Territory Plan Pro Set Up Guide

Version 8

Plan2win software

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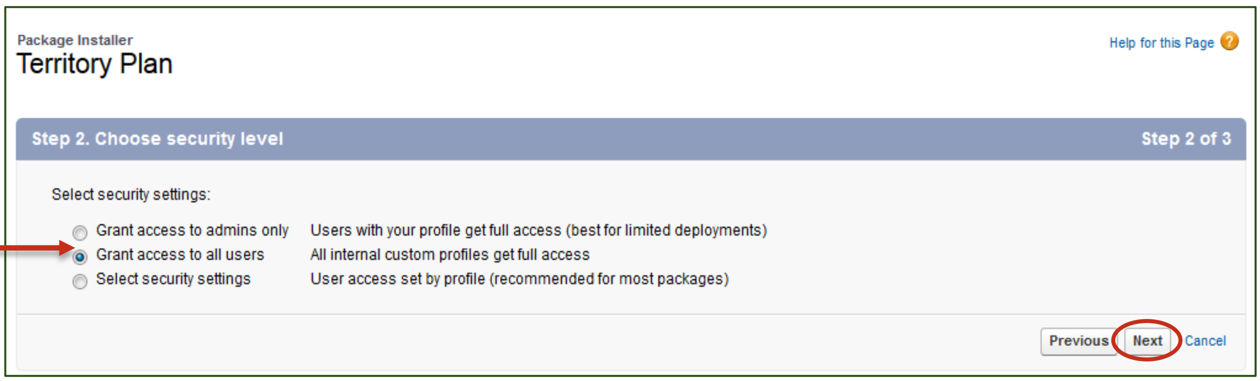
INSTALLING THE APPLICATION

1. Click “Get It Now” on the AppExchange or paste the link you were given into your browser window.
2. In “Package Installation Details,” click continue.
3. In “Package Installer,” click next; bottom right.

For salesforce.com enterprise and unlimited editions. For professional edition, there will only be one choice; select it.

4. On the 2nd screen in “Package Installer”, select the 2nd radio button: Grant access to all users. See below. Click next; bottom right. See image below.
   This will have the app automatically set up permissions for all the objects for your users. However, once you purchase licenses, you will have control over which users you give the license to. Users without a license will not have access to the app.
5. In “Package Installer” 3rd screen, click install.



SET UP CUSTOM PROFILE

There are a number of custom objects that need to be enabled.

CUSTOM PROFILE FOR CUSTOM OBJECTS

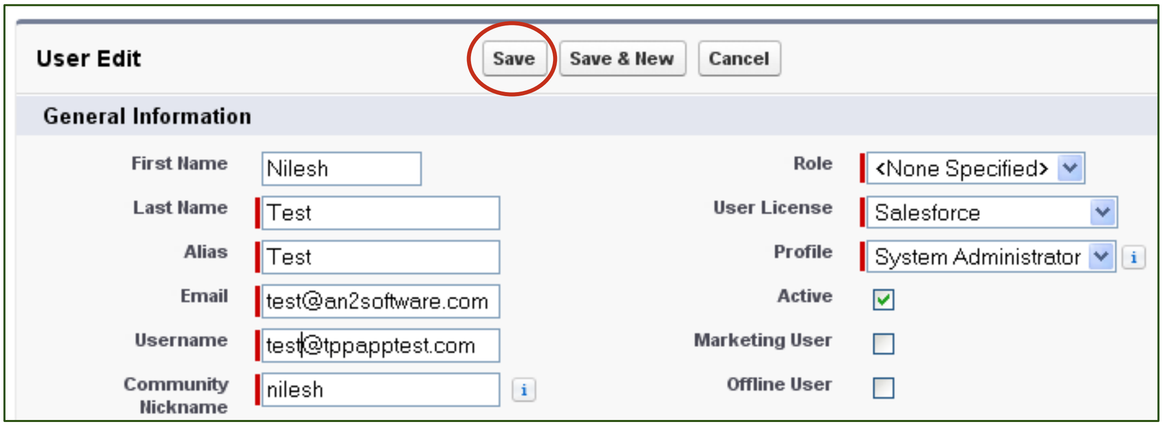
If you are using a standard (out of the box) user profile, you will need to clone it to be able to enable custom objects in that profile.

1. To clone a profile, go to Setup -> Manage users -> Profiles ->
2. Click on the name of the profile to clone
3. At the top, click Clone
4. Type in profile name, i.e. “custom sales rep” and Save

ASSIGN CUSTOM PROFILE TO DESIRED USERS

If you are using a standard (out of the box) user profile, you will need to clone it to be able to enable custom objects in that profile.

1. Go into Set up -> Manage users -> Users (In Lightning: Users -> Users)
2. Click on name of user
3. In User screen, click Edit
4. On the right, in Profile, select desired Profile and Save



SET PERMISSIONS

There are a number of unique objects that need to be enabled.

1. Go into set up -> Manage users -> Profiles (In Lightning: Users -> Profiles)
2. Select the profile for the users of Territory Plan Pro (i.e. sales)
3. Toward the bottom, find the section: **Custom Object Permissions:**
   Enable read, create, edit and delete for the following objects:
   - ⇒ Partners in your Territory
   - ⇒ TerritoryPlans
   - ⇒ Target Accounts
   - ⇒ Target Opportunities
   - ⇒ Opportunities with Current Accounts
   - ⇒ Strategies
   - ⇒ Strength, Weakness, Opportunity, Threat
   - ⇒ My Current top accounts
   - ⇒ Territory Plan Setup (if shown)
   - ⇒ Territory Plan Summary (if shown)

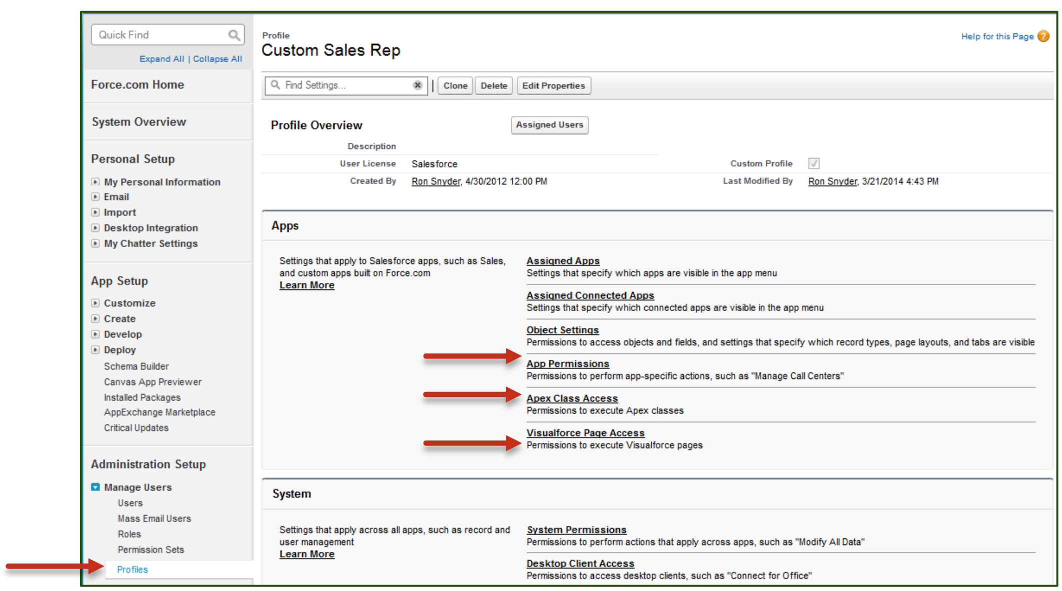
It should look as below.

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Account Channel Partners	✓	✓	✓	✓	✓	✓
AccountPlans	✓	✓	✓	✓	✓	✓
Account Relationships	✓	✓	✓	✓	✓	✓
Account Team	✓	✓	✓	✓	✓	✓
Associated Opportunities	✓	✓	✓	✓	✓	✓
Licenses	✓	✓	✓	✓	✓	✓
Opportunities with Current Accounts	✓	✓	✓	✓	✓	✓
Packages	✓	✓	✓	✓	✓	✓

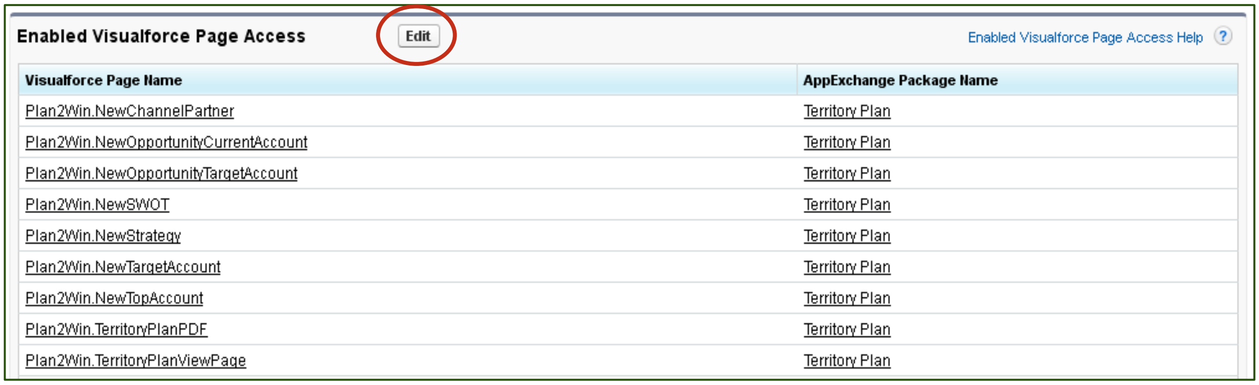
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Package Versions	✓	✓	✓	✓	✓	✓
Partners in your territory	✓	✓	✓	✓	✓	✓
Strategies	✓	✓	✓	✓	✓	✓
Strength, Weakness, Opportunity, Threat	✓	✓	✓	✓	✓	✓
Target Accounts	✓	✓	✓	✓	✓	✓
Target Opportunities	✓	✓	✓	✓	✓	✓
TerritoryPlans	✓	✓	✓	✓	✓	✓
My Top Current Accounts	✓	✓	✓	✓	✓	✓

1. Go into set up -> Manage users -> Profiles (In Lightning: Users -> Profiles)
2. Select the profile for the users of Territory Plan Pro (i.e. Custom Sales Rep below)
3. Click Object Settings -> Check that all Territory Plan Objects have Read, Create, Edit, Delete Permissions. If they do not, click each one, then click and enable each one.
4. Click Visual Force Page Access (In Lightning: Enabled VisualForce Page Access)-> Click Edit -> Make sure all Visual Force Pages starting with Plan2Win are selected in the box on the right.
5. Click Apex Class Access Click Edit (In Lightning: Enabled Apex Class Access)-> Make sure all Apex Classes starting with Plan2Win are selected and in the box on the right. There may not be any.
6. Click Save after each of the changes above.



ENABLE VISUALFORCE PAGE ACCESS

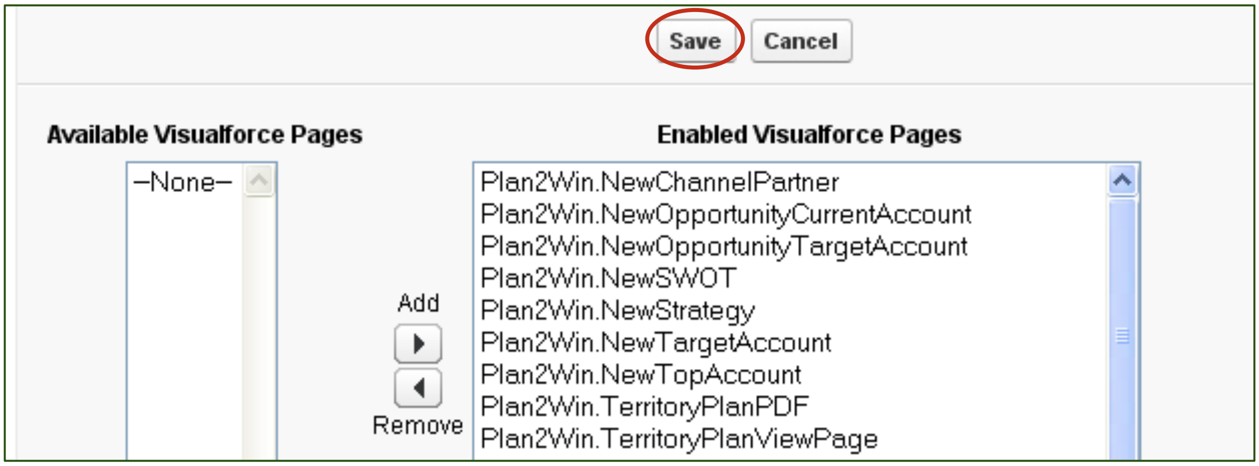
On the same page; lower down, find the section: Enabled Visualforce Page Access and Click Edit.


Enabled Visualforce Page Access Edit Enabled Visualforce Page Access Help

Visualforce Page Name	AppExchange Package Name
Plan2Win.NewChannelPartner	Territory Plan
Plan2Win.NewOpportunityCurrentAccount	Territory Plan
Plan2Win.NewOpportunityTargetAccount	Territory Plan
Plan2Win.NewSWOT	Territory Plan
Plan2Win.NewStrategy	Territory Plan
Plan2Win.NewTargetAccount	Territory Plan
Plan2Win.NewTopAccount	Territory Plan
Plan2Win.TerritoryPlanPDF	Territory Plan
Plan2Win.TerritoryPlanViewPage	Territory Plan

Add these items from the left Available Visual Force Pages to the right Enabled Visualforce Pages and Save.

- ⇒ Plan2Win.NewChannelPartner
- ⇒ Plan2Win.NewOpportunityCurrentAccount
- ⇒ Plan2Win.NewOpportunityTargetAccount
- ⇒ Plan2Win.NewTargetAccount
- ⇒ Plan2Win.NewTopAccount
- ⇒ Plan2Win.TerritoryPlanPDF
- ⇒ Plan2Win.NewSWOT
- ⇒ Plan2Win.NewStrategy

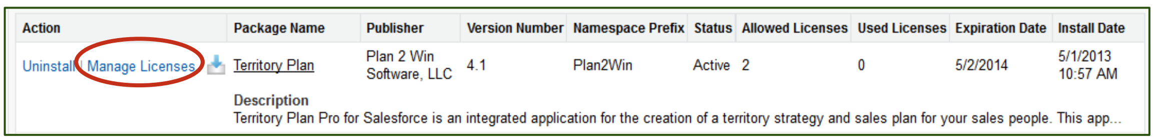


MANAGE LICENSES/ SET UP USERS

Not for Trial installations.

(Trial installations are site licenses, so you do not need to assign licenses)

1. Go to your name -> Set up
2. Under Deploy, click Installed Packages (In Lightning: Apps -> Packaging -> Installed Packages)
3. In the Installed Packages table, find the package name
4. To the left of the package name, click Manage Licenses
5. Select users to apply licenses to.
   Also, this screen shows you the version number of the application installed.



Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date
Uninstall | Manage Licenses	Territory Plan	Plan 2 Win Software, LLC	4.1	Plan2Win	Active	2	0	5/2/2014	5/1/2013 10:57 AM

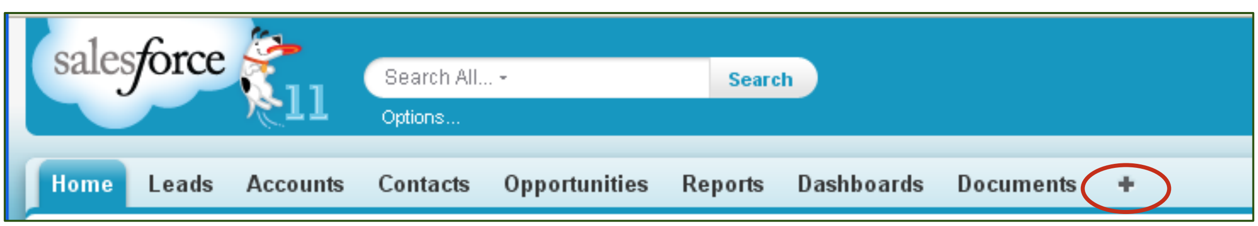
Description
Territory Plan Pro for Salesforce is an integrated application for the creation of a territory strategy and sales plan for your sales people. This app...

ADD THE TERRITORYPLANS TAB

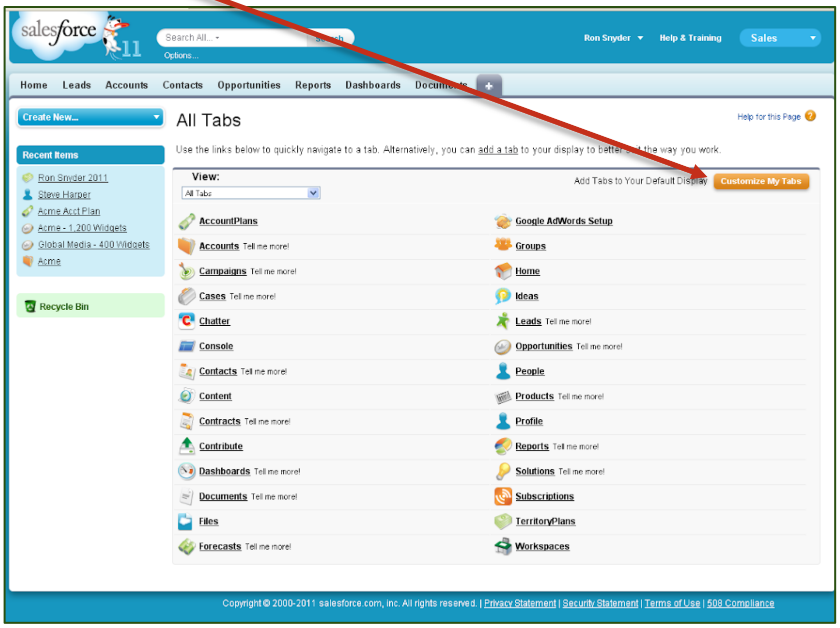
Customize your tabs so that you have one click access to Territory Plan Pro in your Salesforce account. (For Classic UI)

This should be done for or by each user.

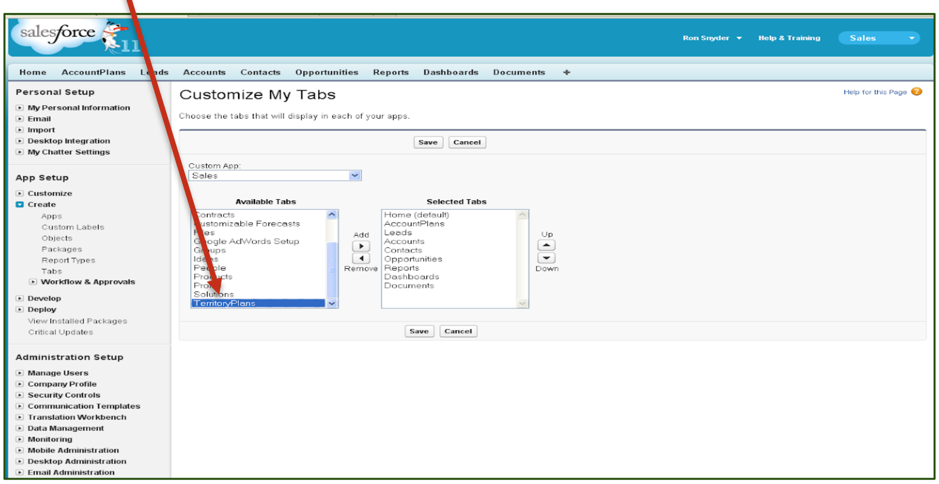
1. Add the Custom Tab (see graphics on next two pages)
2. From any screen, click on "Tabs" icon (+)



3. Select Customize My Tabs



4. Select TerritoryPlans, Add, Save



SHOWING TABS

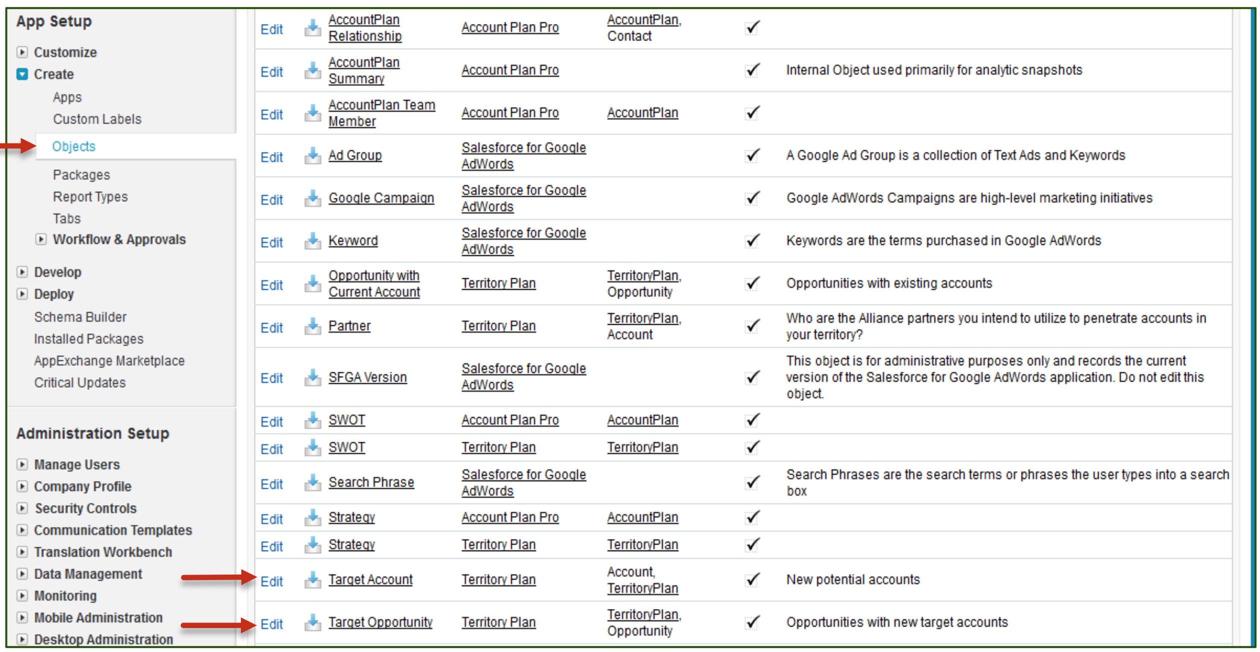
If Territory Plan Tab is not showing up, do this and then repeat the steps above.

1. Setup -> Administration Setup -> Manage Users -> Profiles ->
2. Click on the appropriate Profile -> click Edit -> scroll down to Tab Settings ->
3. Custom Tab Settings -> Territory Plans -> select Default On.

SET UP OBJECTS FOR REPORTS AND DASHBOARDS

(For Classic UI)

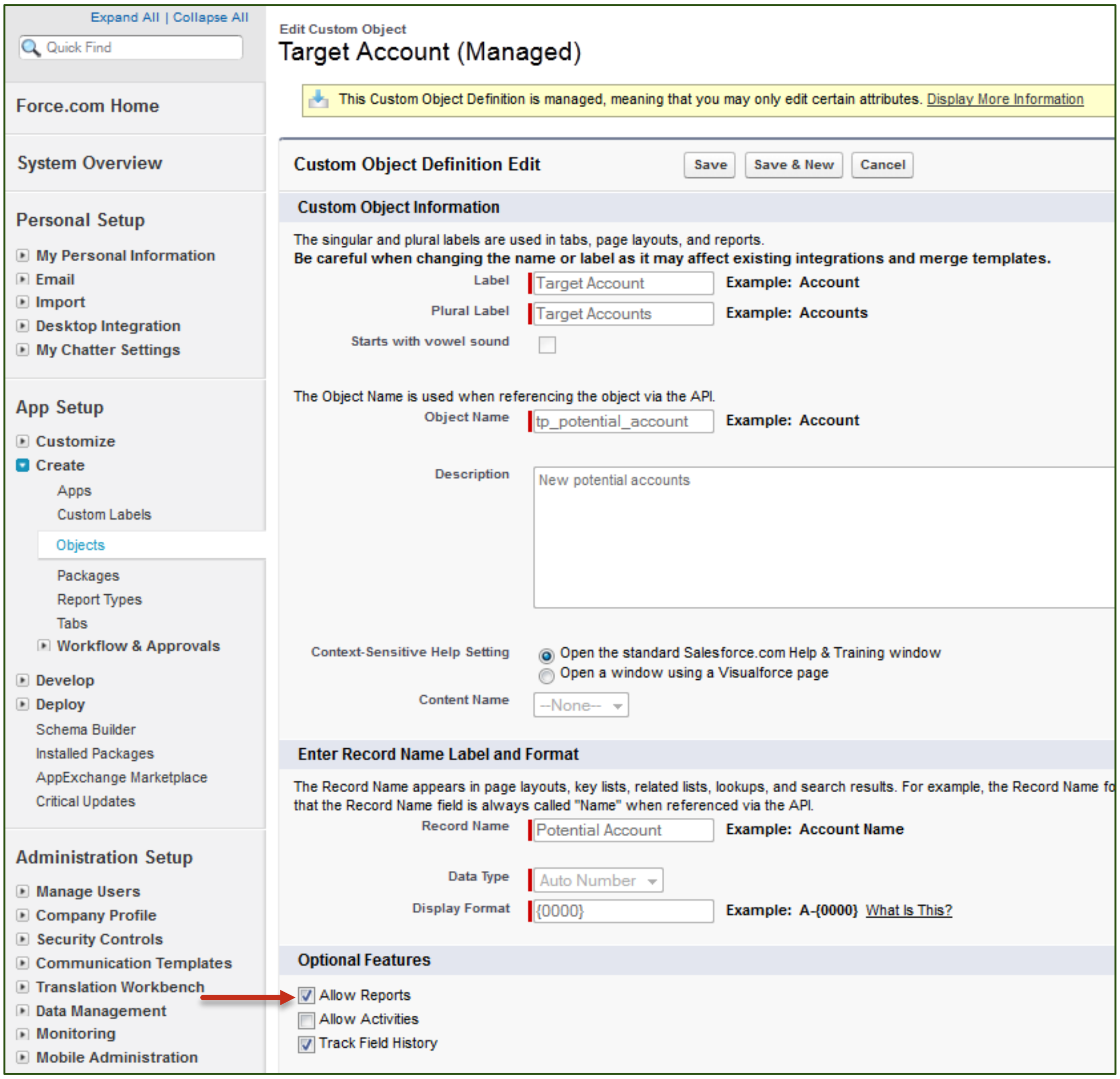
1. Set up -> create -> objects ->
2. Click edit to the left of Target Account and then Target Opportunity



3. Go to the bottom of page, under optional features ->
4. Verify "Allow Reports" is enabled.
   If not, click "Allow Reports."
5. Save

Do this for both object: Target Account and Target Opportunity

If the Dashboard does not show the graphics, use similar steps to ensure that the other Territory Plan objects have "Allow Reports" checked.

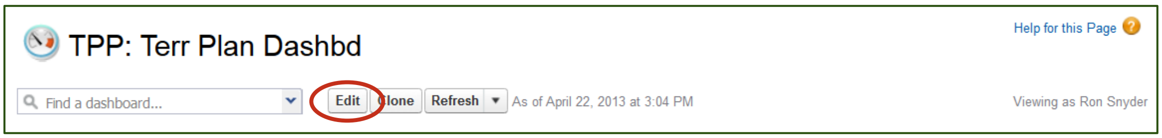

Expand All | Collapse All
Quick Find
Force.com Home
System Overview
Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
App Setup
Customize
Create
Apps
Custom Labels
Objects
Packages
Report Types
Tabs
Workflow & Approvals
Develop
Deploy
Schema Builder
Installed Packages
AppExchange Marketplace
Critical Updates
Administration Setup
Manage Users
Company Profile
Security Controls
Communication Templates
Translation Workbench
Data Management
Monitoring
Mobile Administration
Edit Custom Object
Target Account (Managed)
This Custom Object Definition is managed, meaning that you may only edit certain attributes. Display More Information
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Target Account
Example: Account
Plural Label
Target Accounts
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
tp_potential_account
Example: Account
Description
New potential accounts
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name fo
that the Record Name field is always called "Name" when referenced via the API.
Record Name
Potential Account
Example: Account Name
Data Type
Auto Number
Display Format
{0000}
Example: A-{0000} What Is This?
Optional Features
Allow Reports
Allow Activities
Track Field History

OPTIONAL: SET UP DASHBOARD

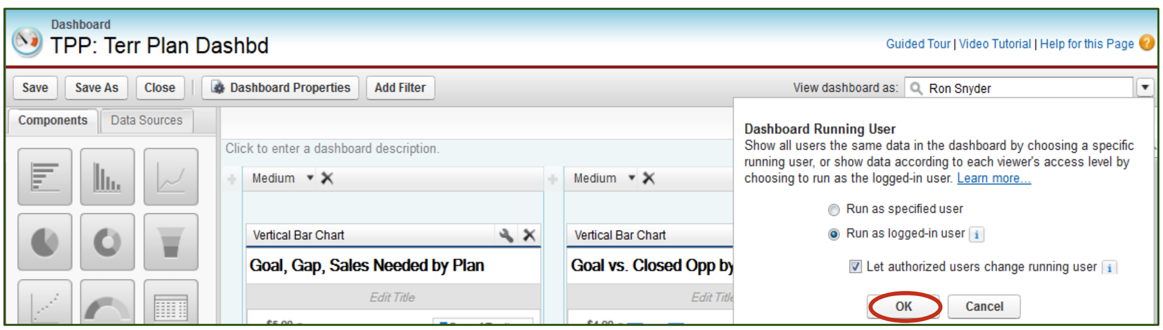
Optional: For Enterprise, Unlimited Edition only: In Classic UI:

If users are having a problem viewing the dashboard, do this.

1. Login as the Salesforce.com admin, and make the following change:
2. Go to dashboards -> Territory Plan Dashboard
3. Click edit



4. On the far right you will see: “view dashboard as:”
5. Click the down arrow on the right side and select: "Run as logged in user"
   You can also, check the box: “let authorized users change running user” if you want.
   Click OK.



In Lightning:

1. Go to Dashboards
2. Select PP: Territory Plan Dashboard
3. On top right, click Edit
4. On top right, click the sprocket symbol (edit properties)
5. In Properties pop up, Change “View Dashboard As” to desired selection

OPTIONAL: SET UP REPORTS FOR LIGHTNING

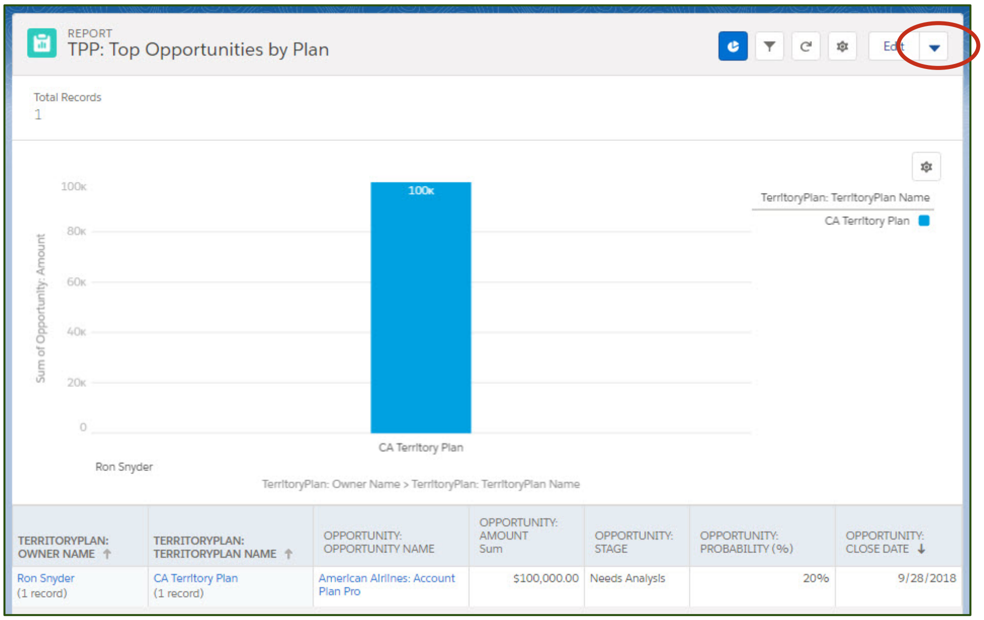
In the Territory Plan Pro Reports folder, here are the reports which need setting up in Lightning:

- TPP: Top Opps by Type by Plan
- TPP: Top Opportunities by Plan
- TPP: Goal, Gap, Sales Needed by Plan
- TPP: Goal, Gap, Open Opps by Plan
- TPP: Goal, Gap, Additional Sales by Plan
- TPP: Goal vs. Closed Opp by Plan
- TPP: Amount by Stage by Plan
- TPP: Amount by Stage by Acct Type
- TPP: Amount by Opp Type by Plan

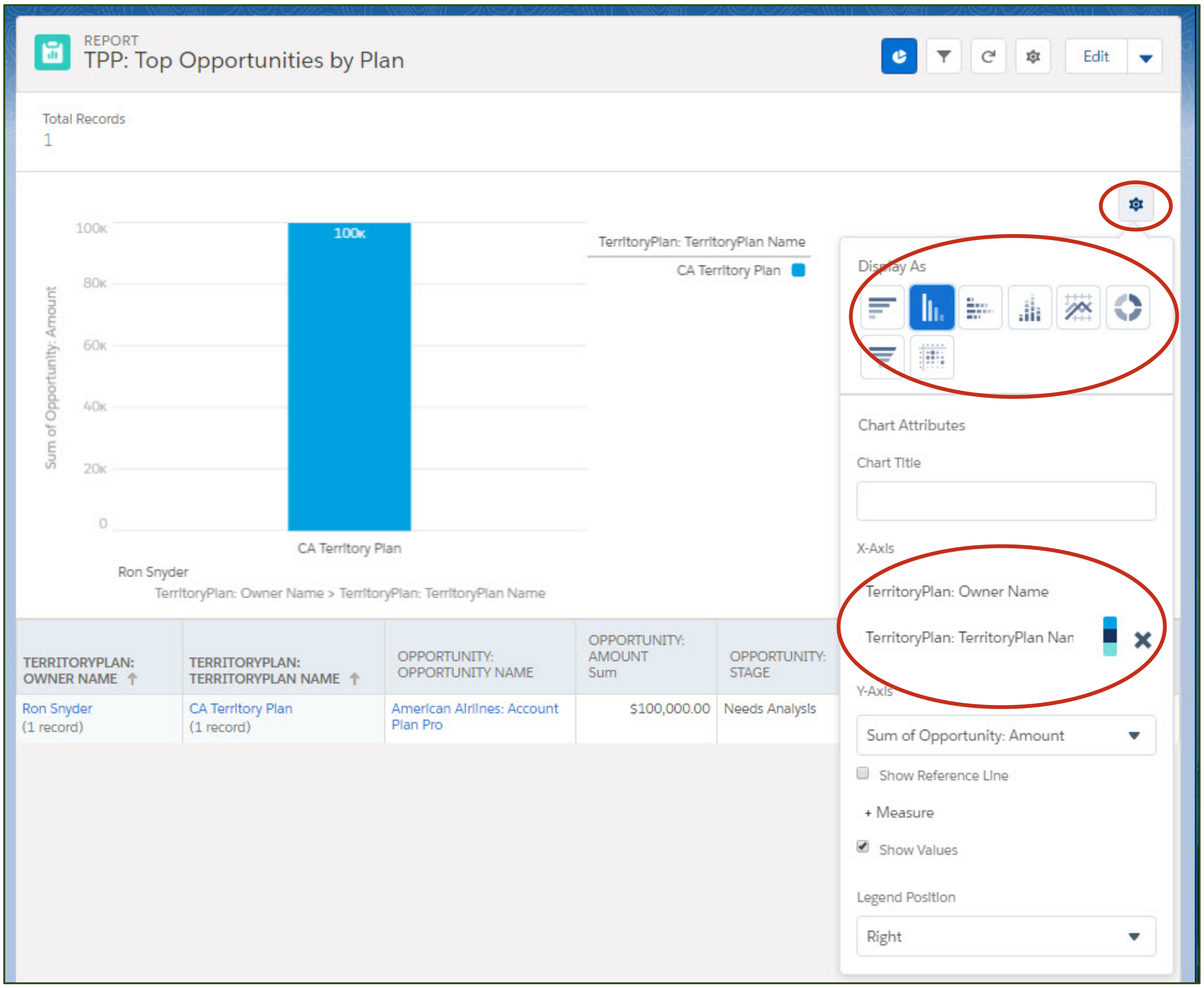
These reports Summarize the data by two variables. The first grouping is Territory Plan Owner. You may want to show the data by the other variable rather than this one. In order to do this, make the following change. This only needs to be done once.

If you are going to use the following reports in Lightning, use these settings.

1. Go to Reports -> All Folders -> Territory plan Reports
2. From the Territory Plan Reports folder, click on the report name to show the report.
3. Once in the report, click on the chart. Then click on the Settings button (see below).



4. Now, click the "Display as" choice you want.
5. Then select the X Axis choice (in this case, Territory Plan Name). In some cases, you will be changing the Y Axis selection.
6. Click the carrot to the right of Edit and click Save or Save As.



NOTE: WORKING IN LIGHTNING

In order to use Lightning components, Salesforce requires that you set up My Domain.

Go to Set Up -> Company Settings -> My Domain and follow instructions to set up My Domain.

In addition, you must enable Chatter in your organization. In Set Up, search for Chatter and check box to enable Chatter. See Salesforce instructions.

SETTING UP LIGHTNING

Set up Buttons for Lightning.

Go to: Set up -> Object Manager

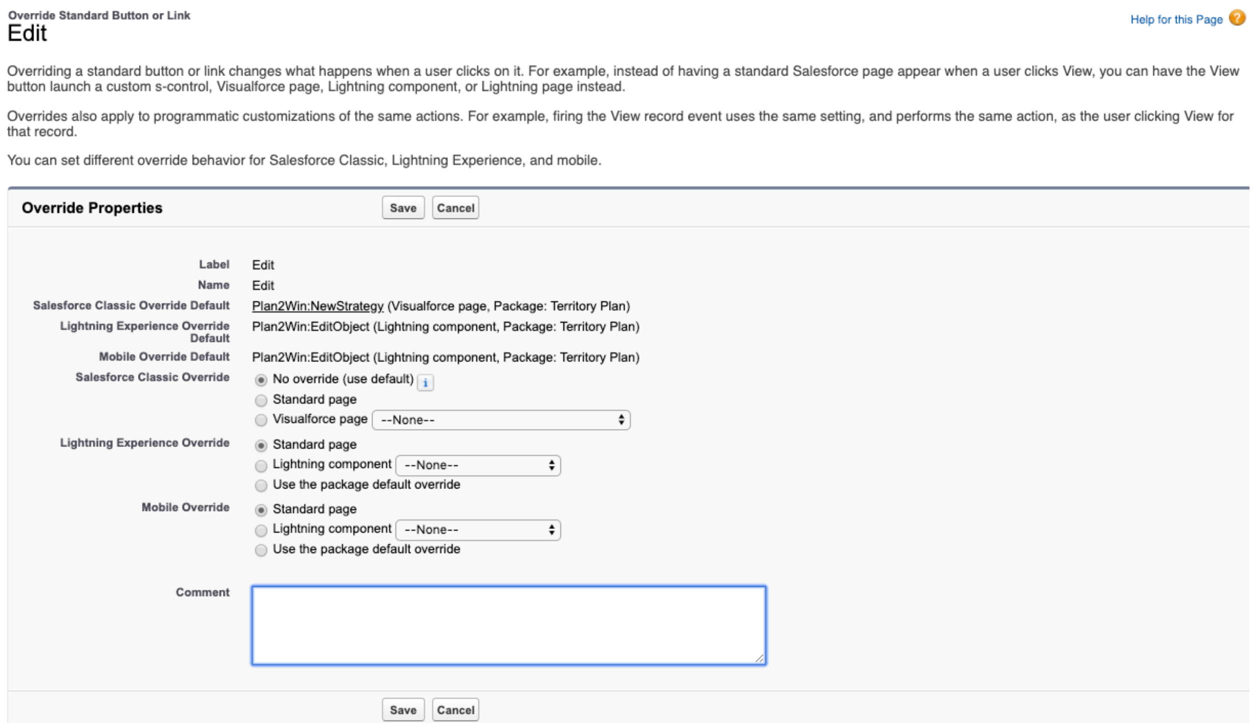
Choose each Territory Plan Object:

Partner, SWOT, Strategies, Target Account, Target Opportunities

Click that object (i.e. Strategies)

Click Buttons, Links, and Actions

On the Edit line, click the drop-down arrow on the right and click Edit. Change the radio buttons to look as below… change Lightning Experience Override and Mobile Override to the standard radio button. Save.



On the New line, click the drop-down arrow on the right and click Edit. Change the radio buttons to look as above… change Lightning Experience Override and Mobile Override to the standard radio button. Save.

Do this for each of the Territory Plan objects per above.

USER NOTE: WORKING IN LIGHTNING

A limitation of the Lightning user interface is that it does not always refresh the data after a change has been saved. Please let your users know that, when this occurs, they can click the “refresh button” on their browser and Lightning will update the information. For example, if a user makes a change to a SWOT, Strategy, Target Accounts, Target Opportunities or Partners in Your Territory and the information on their screen is not updated, they can click the “refresh button” on their browser and Lightning will update the information. Sometimes, they may have to click the refresh button twice.

We have been told that Salesforce.com is working to resolve this issue.

Please let you users know:

- In the Dashboard, there is a refresh button on the top right that can be used.
- In the related list tabs at top- there are refresh buttons on the top right of the section.
- To show Territory Plans in the Nav Bar at the top, click on the Territory Plans tab (that shows temporarily), click on the down button to the right of the tab and select “Add to Nav Bar.”

SETTING UP LIGHTNING FOR INTERNET EXPLORER

Because Internet Explorer does not support certain security contracts that Salesforce uses, Salesforce has discontinued standard support of it. However, one can enable it using these steps to use the lightning user interface in Internet Explorer:

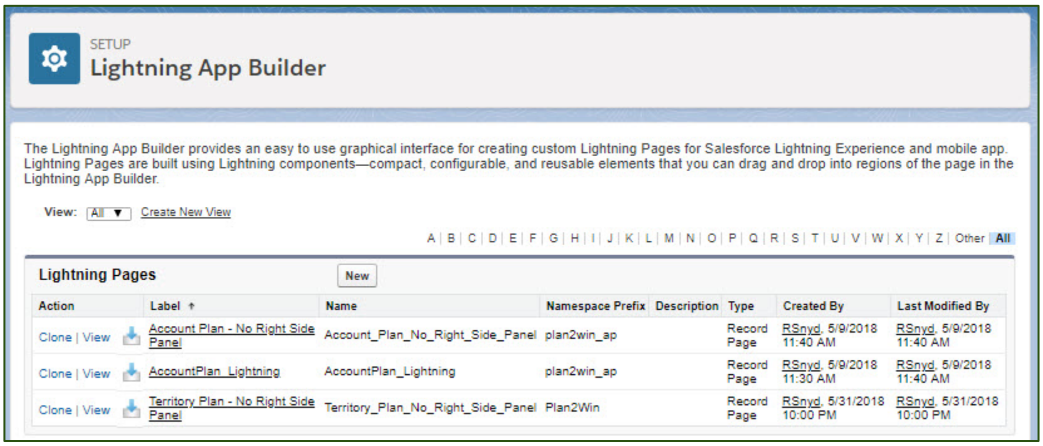
- Users must use the latest rev; Internet Explorer 11.
- To enable the use of Internet Explorer 11, go to Set Up, and type in Session Settings in the Quick Find Box. You'll see the check box to extended support for Internet Explorer 11. Click Save.

USER NOTE: WORKING ON A SMARTPHONE OR TABLET

On a Smart Phone or tablet, in Mobile 1 or a browser: when looking for reports, use the search bar at the top of the screen to find reports- start with “TPP” and the Territory Plan reports will appear. Select the one you want to view.

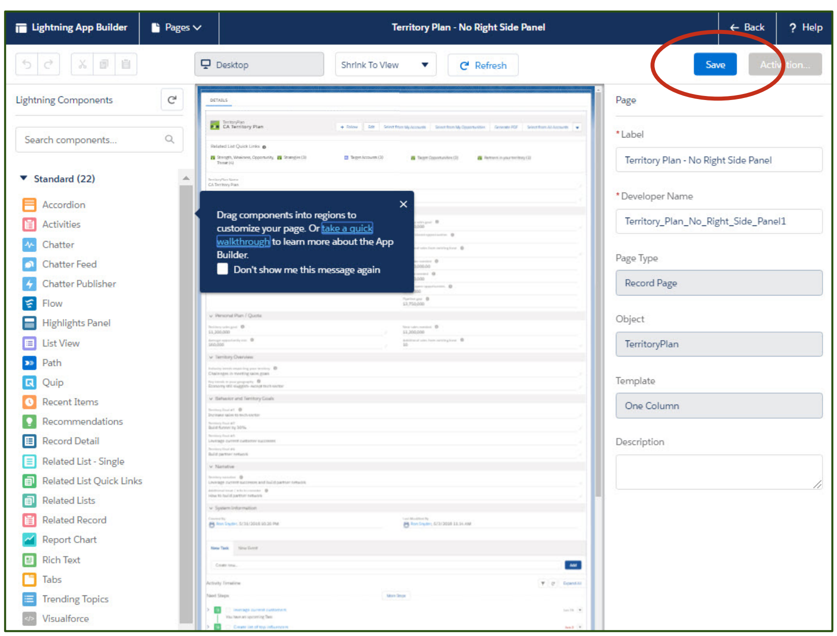
OPTIONAL: CHANGE LIGHTNING PAGE LAYOUT

1. Go to Set Up -> type in Lightning App Builder -> Click it. (You may need to enable it first.)
2. Click Clone: “Territory Plan- No Right Side Panel”



3. Make Changes in the Page Layout -> Click Save -> Click Activation.
4. See next page.

When activating, you may need to choose the option to make this page layout the default for the organization.

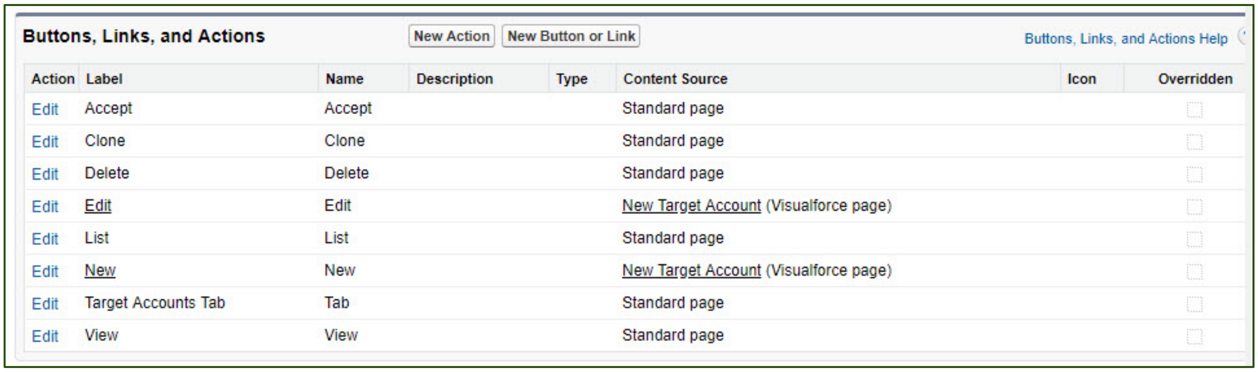


OPTIONAL: CHANGE BUTTONS, LINKS & ACTIONS FOR LIGHTNING

For organizations using Lighting UI only, you may choose to remove our overrides and use the Lightning functionality to customize pages and buttons to your needs.

From the Classic UI view of Set Up:

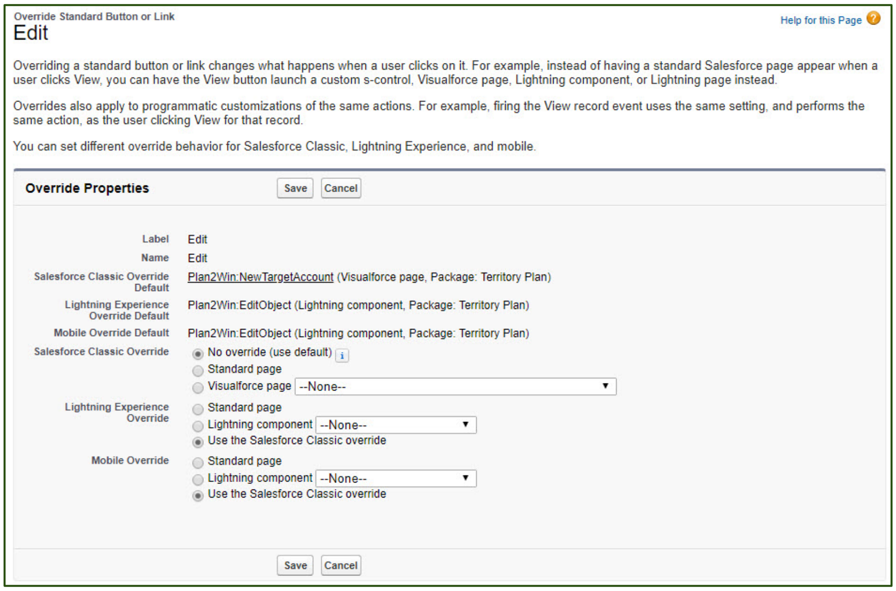
1. Go to Set Up -> Create -> Objects (In Lightning: Set Up -> Objects and Fields -> Object Manager)
2. Click on the object (any or all Territory Plan objects, i.e. Target Account) ->
3. Scroll down to Buttons, Links & Actions -> click edit on the one you want to change ->


Buttons, Links, and Actions New Action New Button or Link Buttons, Links, and Actions Help

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accept	Accept			Standard page		
Edit	Clone	Clone			Standard page		
Edit	Delete	Delete			Standard page		
Edit	Edit	Edit			New Target Account (Visualforce page)		
Edit	List	List			Standard page		
Edit	New	New			New Target Account (Visualforce page)		
Edit	Target Accounts Tab	Tab			Standard page		
Edit	View	View			Standard page		

In Territory **Plan Pro rev 7.4 and before- if you use Lightning only**: In Salesforce Classic Override, Lightning Experience Override and Mobile Override, select standard page.

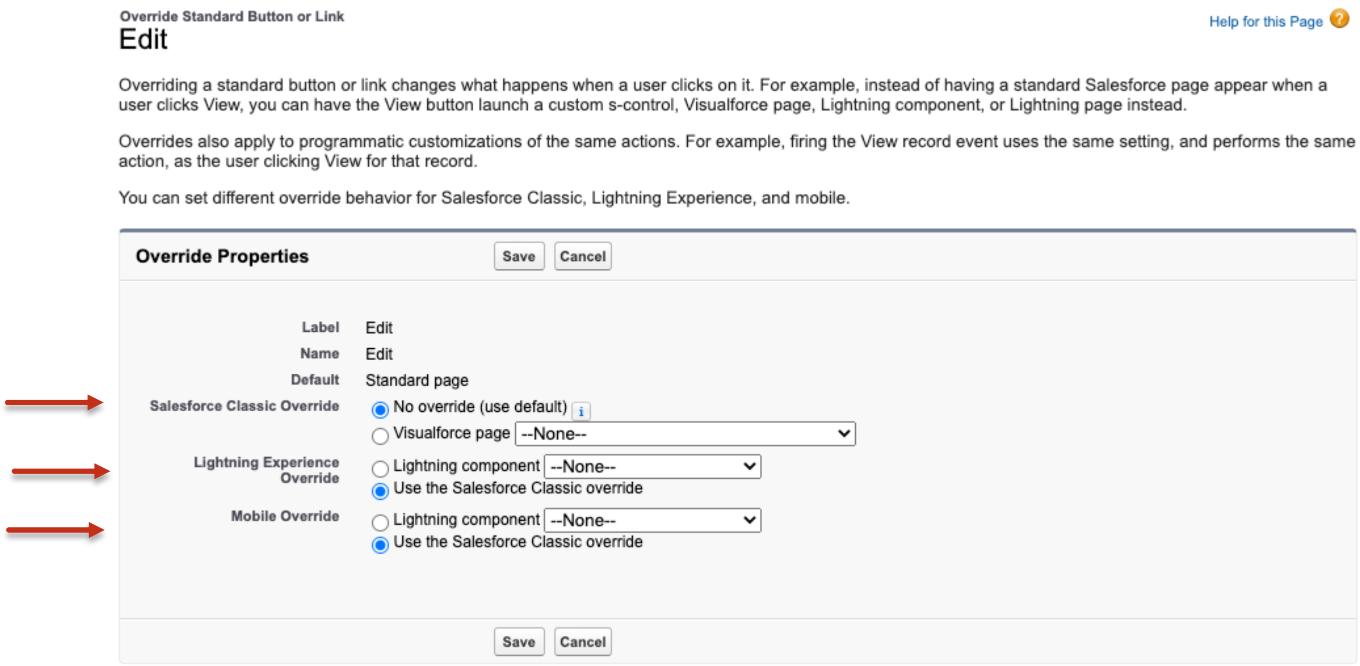
If you use Classic UI or mobile, in Classic override, Visual Force page, select New P2W page.



In Territory Plan Pro rev 7.5 and beyond- if you use Lightning only:

In Salesforce Classic Override, Lightning Experience Override and Mobile Override, leave the set up as below.

If you use Classic UI and mobile, in Classic override, Visual Force page, select New P2W page.



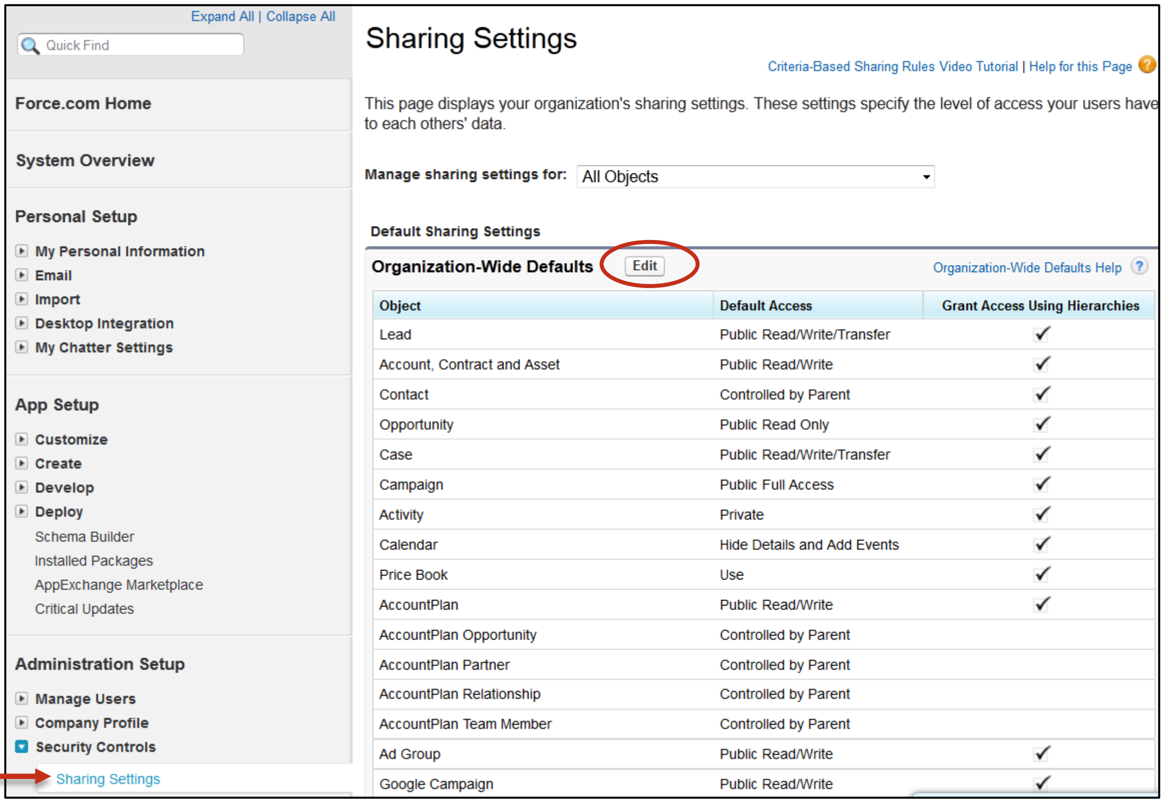
OPTIONAL: SET PRIVACY SETTINGS

Set the Organization Wide Defaults for the Territory Plan Pro object to make plans:

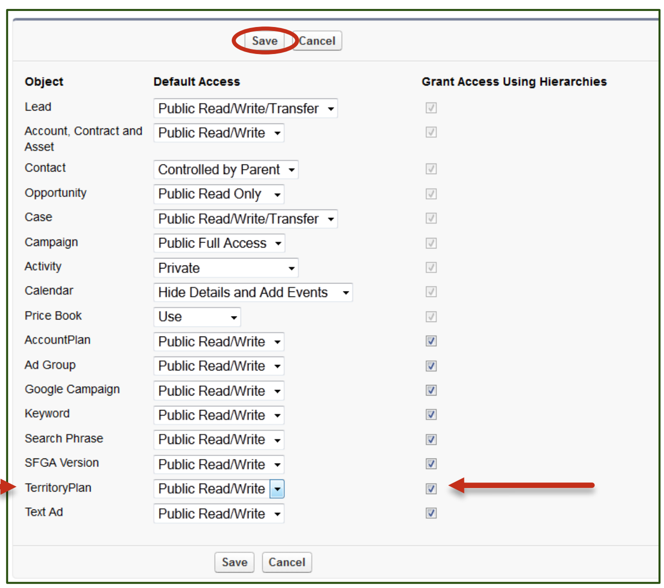
Public= everyone can see each other’s plans.

Private= people can only see their own plan or see plans in your hierarchy- if you “grant access using hierarchy.”

1. Click Your Name -> Setup -> Security Controls -> Sharing Settings.
2. Click Edit in the Organization-Wide Defaults area.
3. For each object, select the access you want to use.
4. To enable automatic access to plans using your hierarchies, select Grant Access Using Hierarchies for Territory Plan Pro.
   By default this is enabled.



5. To the right of TerritoryPlan, Select Public Read/Write, Public Read or Private and "Grant Access Using Hierarchy" per your preference. See below.

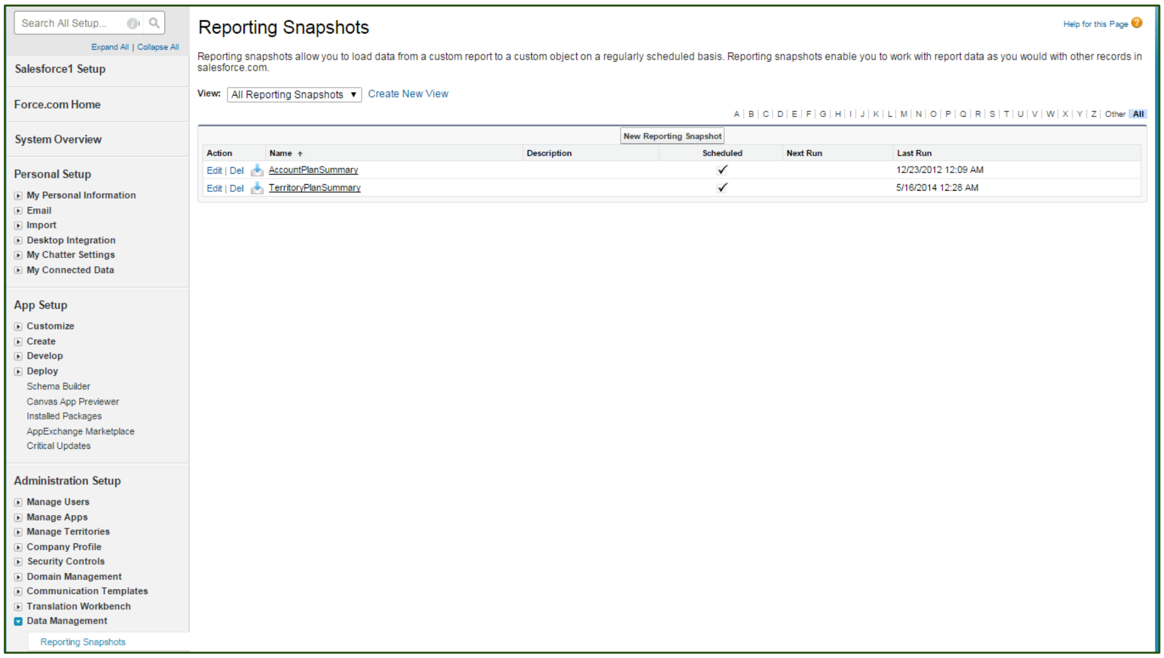


OPTIONAL: SET UP REPORTING SNAPSHOT

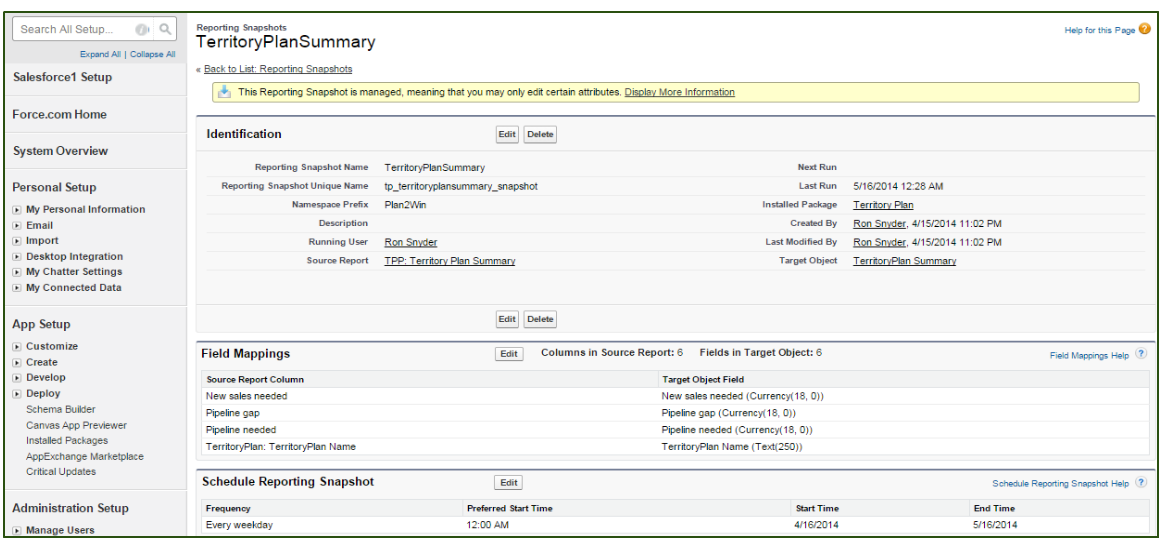
Optional: If you are upgrading from rev 2 to 3, you must update plans first (see Upgrade Guide).

This Reporting Snapshot captures the progress of Territory Plan variables: Sum of Sales Needed, Pipeline Needed and Pipeline Gap over time.

1. Setup -> Administration Setup -> Data Management -> Reporting Snapshot
2. Click Territory Plan Summary

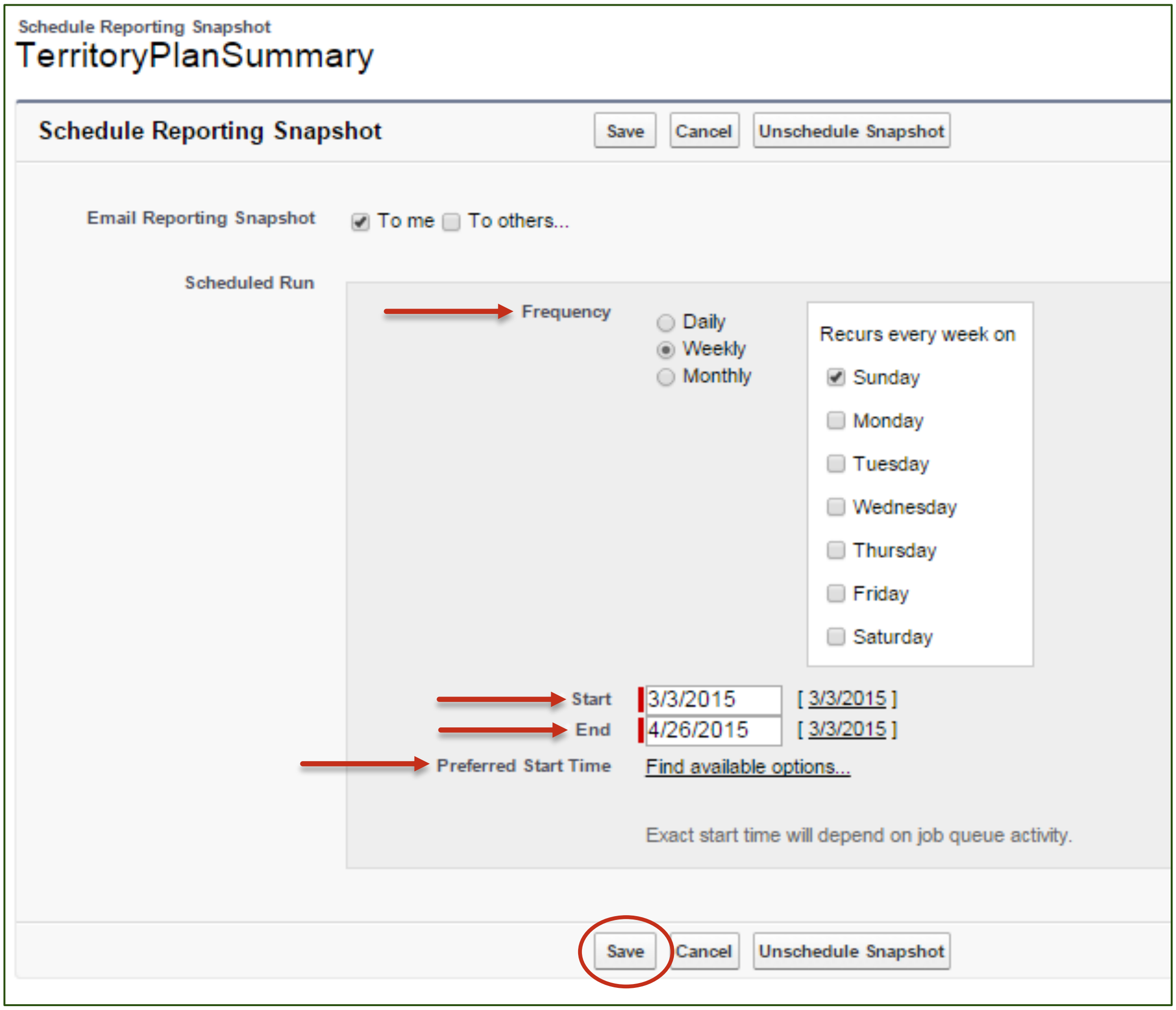


3. Scroll to Schedule Reporting Snapshot -> click Edit. See below.



4. Select Frequency and start and end dates

5. Preferred Start Time: click show available. Select the time Salesforce gives you
6. Save

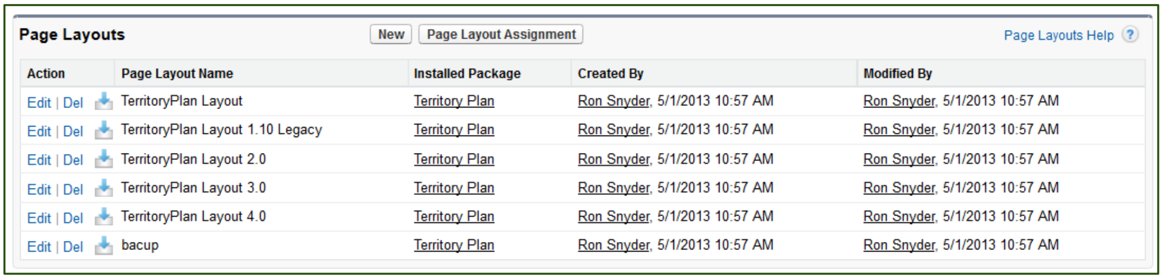


OPTIONAL: ATTACH FILES TO PLAN

1. Setup -> create -> objects
2. Click on TerritoryPlan -> edit

   In Enterprise, Unlimited Edition:
3. Scroll down to page layouts -> edit the most recent TerritoryPlan layout.

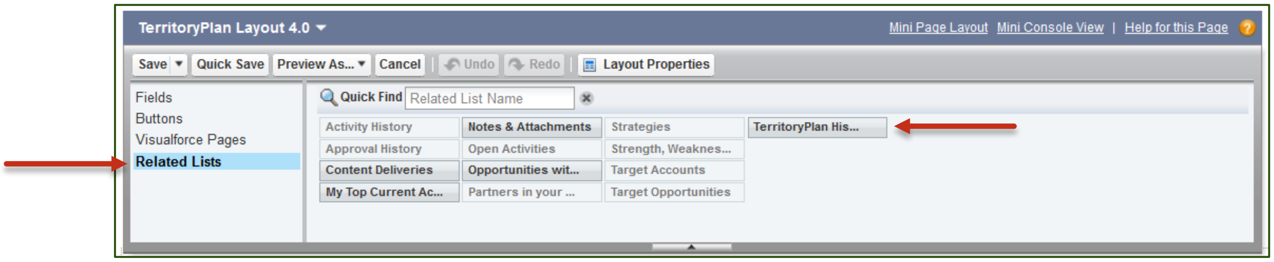
   In Professional Edition: there is only one Territory Plan Layout. Click Edit to the left of it.
4. Click on related lists and drag notes an attachment to where you want them to be in the layout.



Page Layouts | New | Page Layout Assignment | Page Layouts Help

Action	Page Layout Name	Installed Package	Created By	Modified By
Edit | Del	TerritoryPlan Layout	Territory Plan	Ron Snyder, 5/1/2013 10:57 AM	Ron Snyder, 5/1/2013 10:57 AM
Edit | Del	TerritoryPlan Layout 1.10 Legacy	Territory Plan	Ron Snyder, 5/1/2013 10:57 AM	Ron Snyder, 5/1/2013 10:57 AM
Edit | Del	TerritoryPlan Layout 2.0	Territory Plan	Ron Snyder, 5/1/2013 10:57 AM	Ron Snyder, 5/1/2013 10:57 AM
Edit | Del	TerritoryPlan Layout 3.0	Territory Plan	Ron Snyder, 5/1/2013 10:57 AM	Ron Snyder, 5/1/2013 10:57 AM
Edit | Del	TerritoryPlan Layout 4.0	Territory Plan	Ron Snyder, 5/1/2013 10:57 AM	Ron Snyder, 5/1/2013 10:57 AM
Edit | Del	bacup	Territory Plan	Ron Snyder, 5/1/2013 10:57 AM	Ron Snyder, 5/1/2013 10:57 AM

5. Save

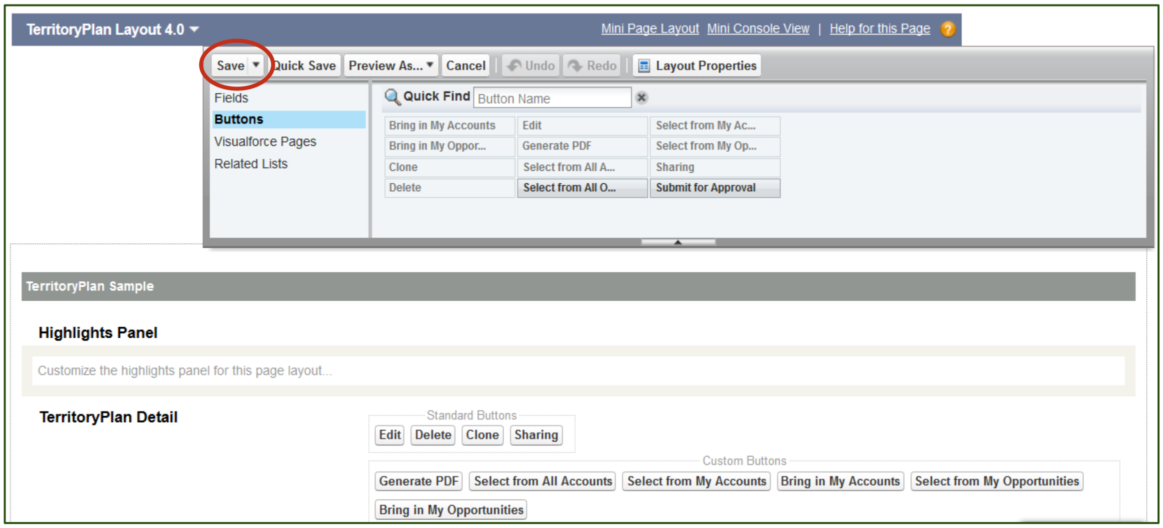


OPTIONAL: UPDATE BUTTONS

Optional: Update Buttons to add “Select from All Opportunities” button.

If your permissions are set up in a typical manner, do not use “Select from All Opportunities” as the user will receive an error if they try to bring in an opportunity that they do not have read and write permissions for. See the next topic for details on permissions and insufficient privileges errors.

1. Set up -> create -> objects -> click Territory Plan->Page Layout section->Edit current page layout (4.0).
2. On the left side of the Territory Plan Layout, select Buttons.
3. Drag “Select from All Opportunities” button into the page layout.
4. Save.



NOTE: PERMISSIONS, INSUFFICIENT PRIVILEGES ERRORS

NOTE: Regarding “Select from All Opportunities” button and Insufficient Privileges Errors. Also see previous topic.

If your permissions are set up in a typical manner, do not use “Select from All Opportunities” as the user will receive an error if they try to bring in an opportunity that they do not have read and write permissions for.

If you want to enable users to include in their plans opportunities that they are not the owners of, use the “Select from All Opportunities” button as this will give them access to opportunities they are not the owners of. However, it is important that you set it up so that users have read and write permission/privileges for those opportunities. Again, should they try to bring in opportunities they do not have read and write privileges for, they will get an Insufficient Privileges Error. This is all based on Salesforce.com permissions, rather than our app.

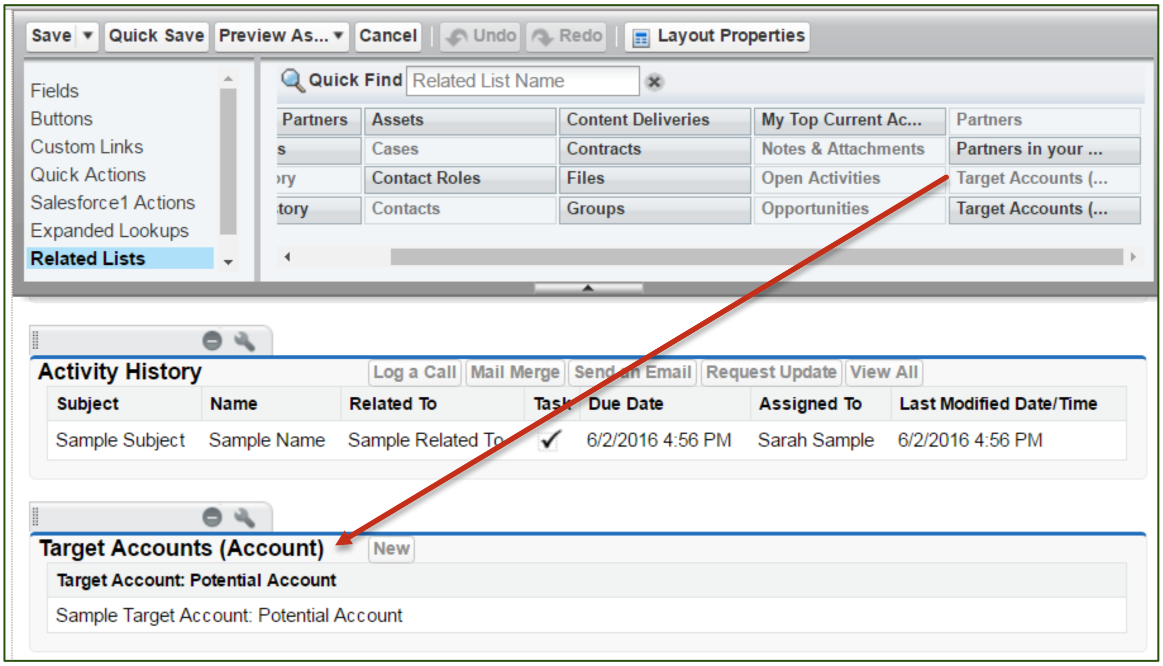
The most likely positive intent for setting it up this way is to enable inclusion of other opportunities they are involved in but not the owner of. This would include opportunities with a headquarters account or other regional accounts that they do not own.

Further, if users have permission to read and write a territory plan and, within that plan, attempt to delete an opportunity that they do not own, they will receive an Insufficient Privileges Error.

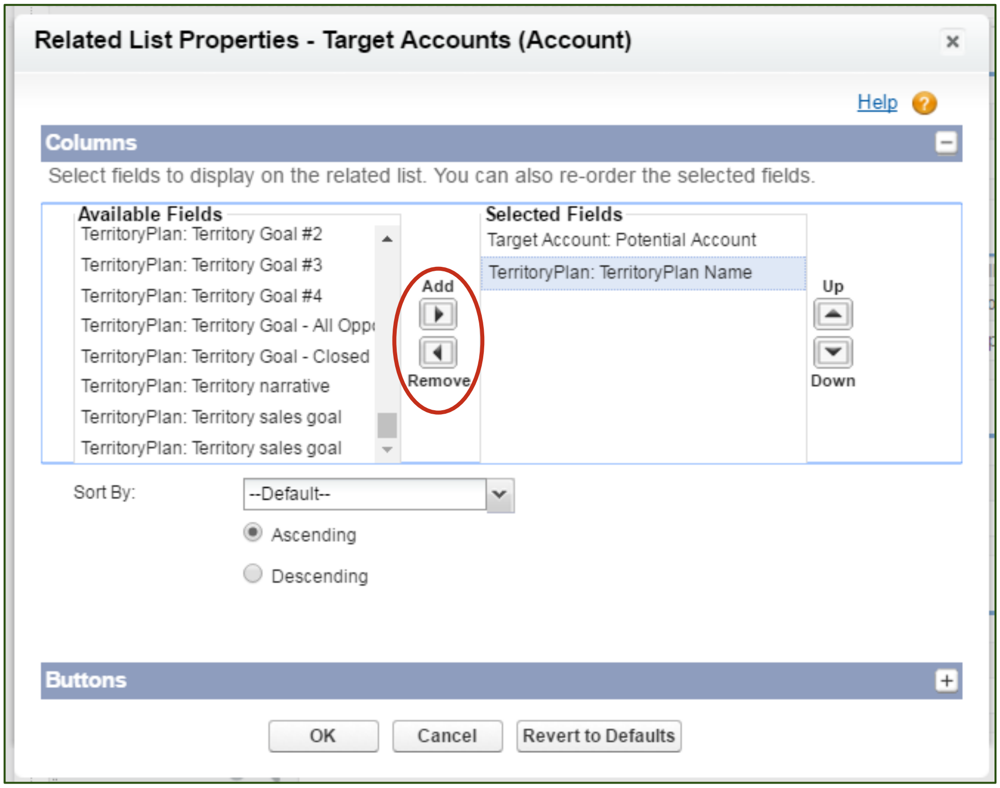
OPTIONAL: ADD ACCOUNTS AND OPPORTUNITIES FROM ACCOUNT AND OPPORTUNITY PAGES

ADD BUTTON TO ENABLE USERS TO ADD ACCOUNTS FROM THE ACCOUNT PAGE

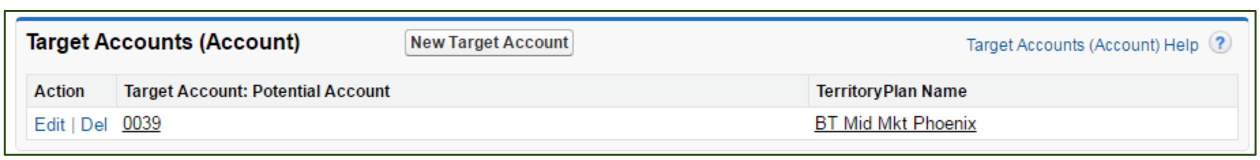
1. Setup -> App Setup -> Customize -> Accounts -> Page Layouts
2. Click: Edit the Account Page Layout
3. On the left side, select: Related Lists -> Drag and place the first Target Accounts button where you want it in the page layout.
4. Save.



5. Add additional fields to the section by clicking the wrench in the Account Plan Opportunities section.
6. After clicking the wrench, select available fields you want to include in the section by selectin the field and clicking "Add" then "Save."

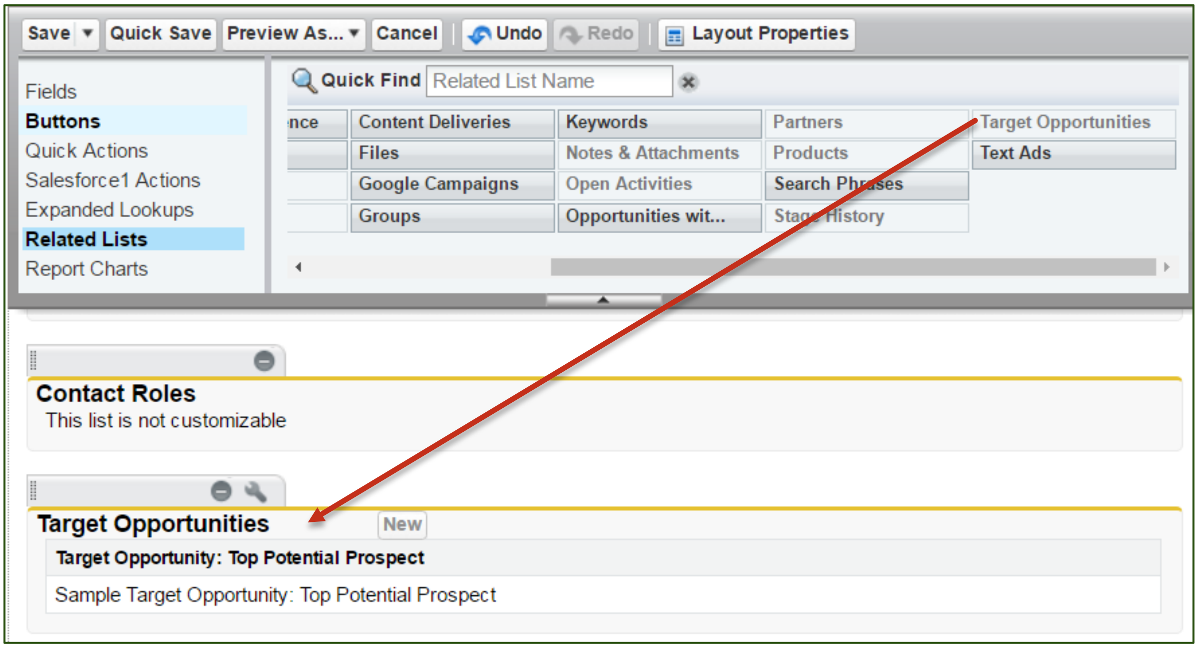


The Account page will now have this section in it. Users can add the account into the Territory Plan from the Account page using this section.

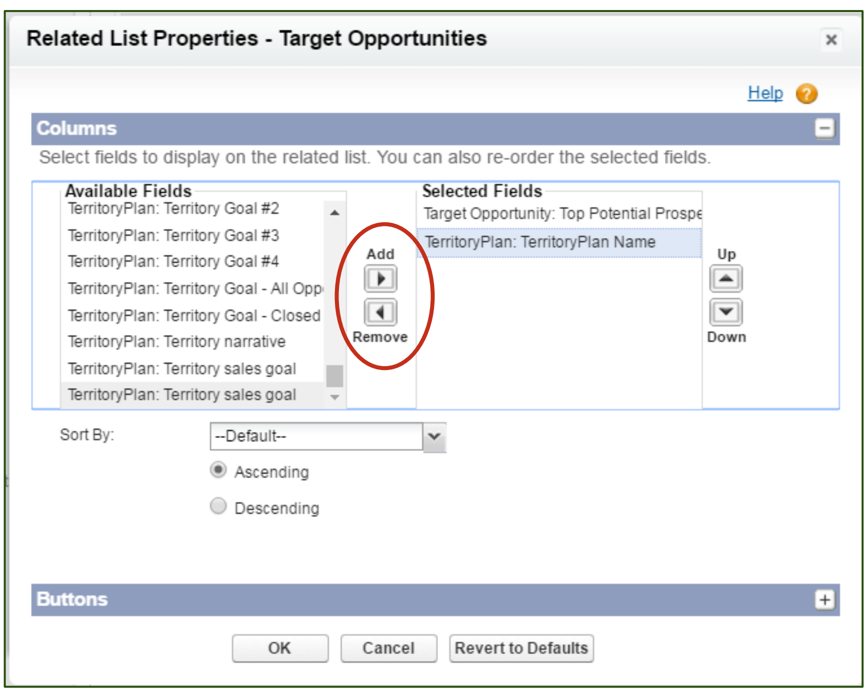


ADD BUTTON TO ENABLE USERS TO ADD OPPORTUNITIES FROM THE OPPORTUNITY PAGE

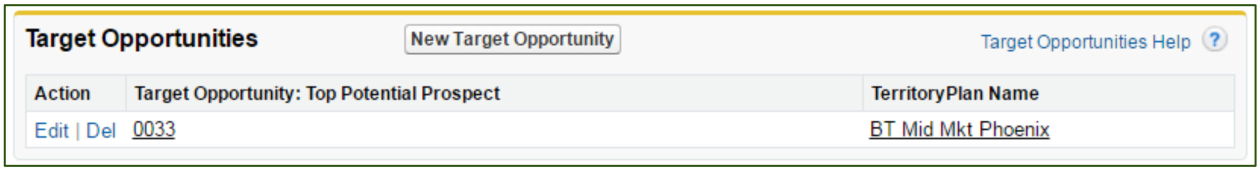
1. Setup -> App Setup -> Customize -> Opportunities -> Page Layouts
2. Click: Edit the Opportunity Page Layout
3. On the left side, select: Related Lists -> Drag Target Opportunities and place it where you want it in the page layout.
4. Save.



5. Add additional fields to the section by clicking the wrench in the Territory Plan Opportunities section.
6. After clicking the wrench, select available fields you want to include in the section by selecting the field and clicking “Add” then “Save.”



The Opportunity page will now have this section in it. Users can add the opportunity into the Territory Plan from the Opportunity page using this section.



OPTIONAL: CHANGE DROP-DOWN MENU VALUES

To change drop-down menu values (including adding new, reordering, replacing the values):

1. Set up -> Customize -> Objects
2. Click on the object (i.e. Target Account)- not on the Edit button
3. Scroll down to Custom Fields & Relationships and click the field label of the field that has the drop-down menu you want to change (i.e. Buying Role). Check the data type. It should be a Picklist.
4. Scroll down to Values and make the changes you want to make.

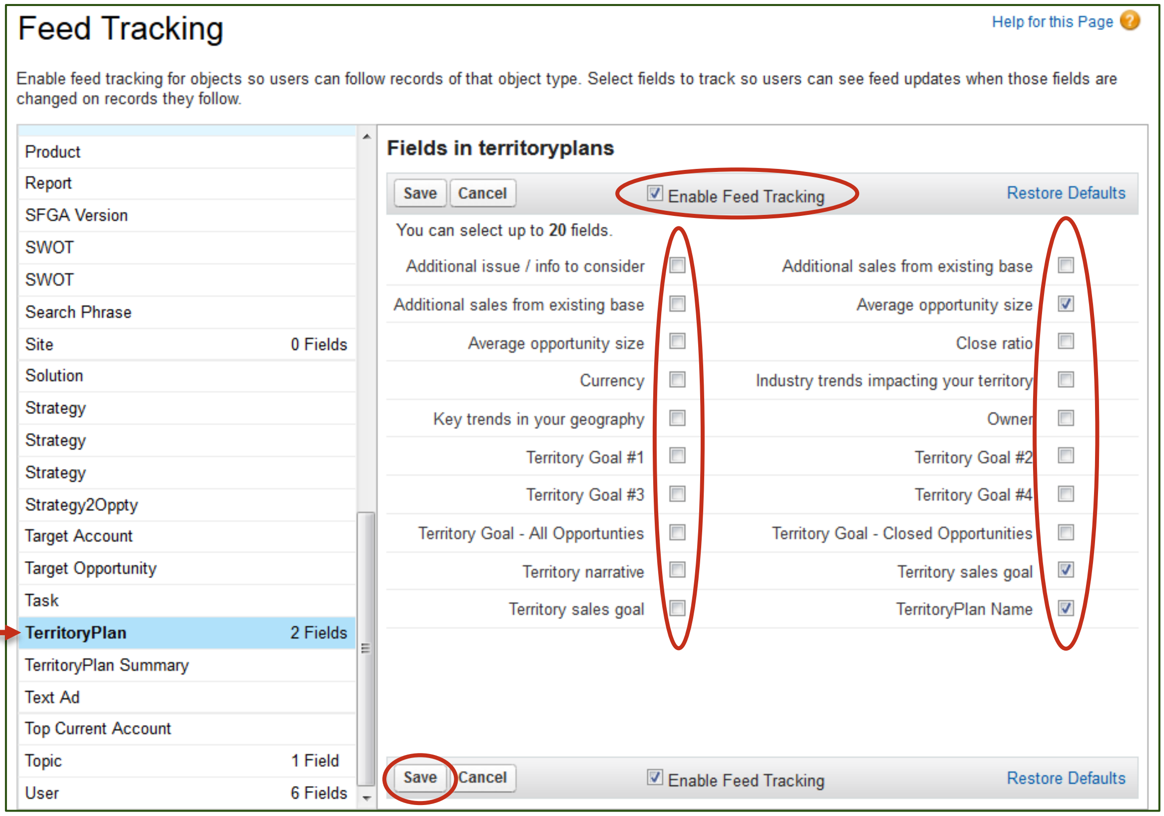
OPTIONAL: FOLLOW PLAN CHANGES ON CHATTER

OVERVIEW

The way Chatter is set up, you can follow changes in fields unique to that object- for example fields that are unique to the Territory Plan. If you want to follow changes in fields from other custom fields or standard fields, you need to track them through the feed tracking of that object. For example, if you want to follow changes to the amount field associated with the opportunity object, you would track that through the opportunity object in Chatter.

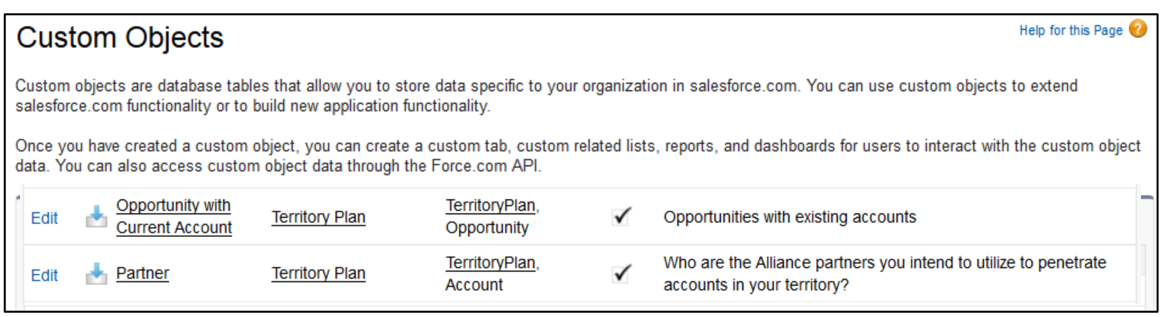
5. Set up -> Customize -> Chatter -> Customize field tracking in your feeds

6. In the Feed Tracking screen, select the object in which the fields reside- i.e. Territory Plan
7. Click “enable feed tracking” and check the fields in Territory Plans to track and click Save. See below.



OPTIONAL: ADD FIELDS TO EDIT PAGES

1. Set up -> Create -> Objects
2. Scroll down and Click on the object of the edit page you want to add a field to; for example, the Partner object in the Territory Plan and edit page.

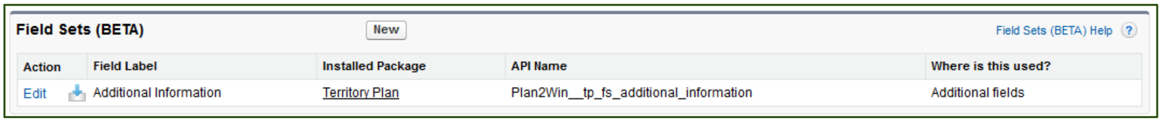


3. In the Custom Object page (i.e. Partner), scroll down to Custom Fields and Relationships and Click New.
4. Choose the Field Type -> click the radio button of the appropriate field type -> Next
5. Enter Details -> input required fields, i.e. Field Label and Field Name… and other elements, i.e. Description -> Next

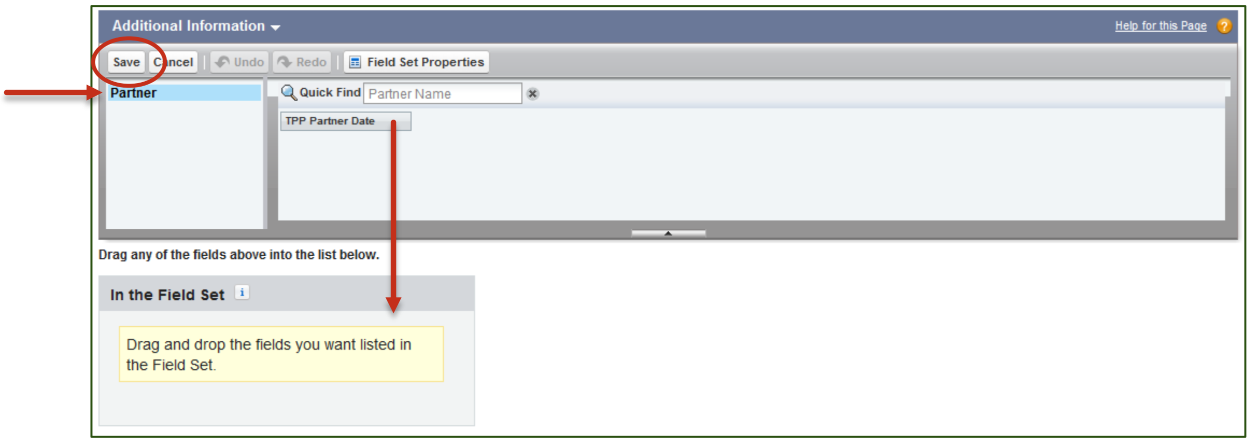
6. Establish Field Level Security -> check appropriate boxes: Visible, Read-Only - > Next
7. Add to Page Layouts -> Select page layout- typically, use the default -> Save. See below.

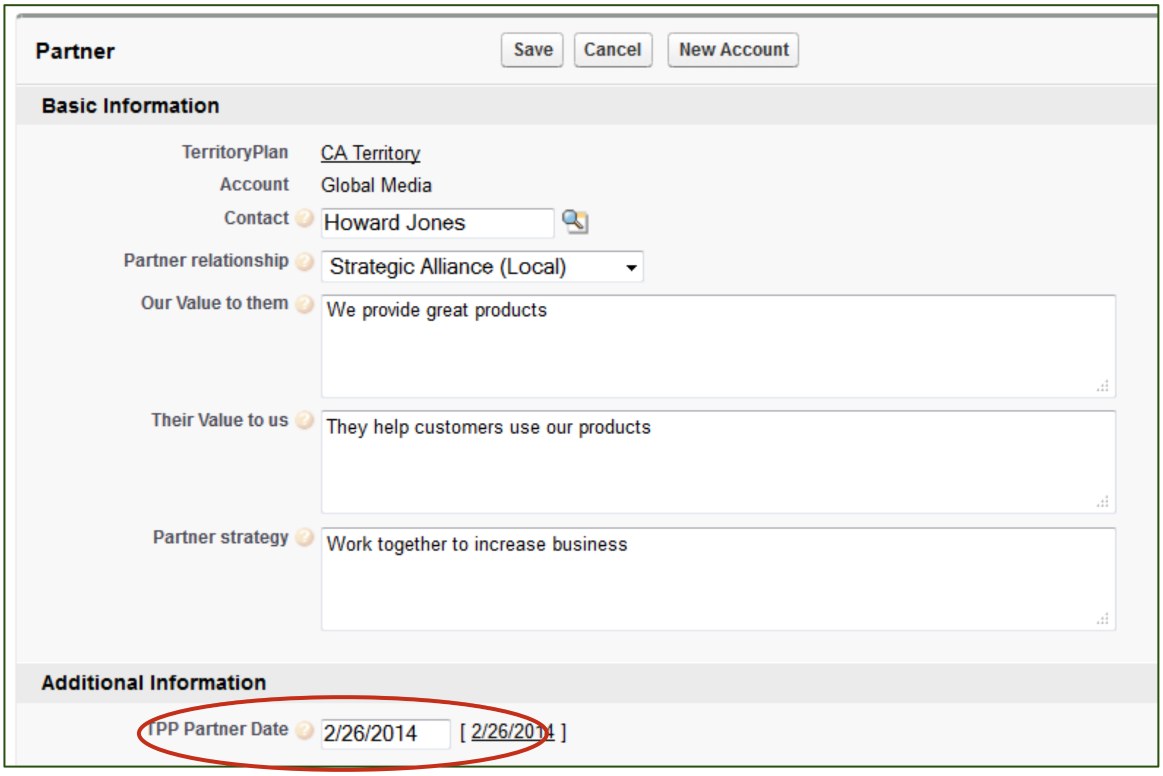
OPTIONAL: ADD FIELDS TO FIELD SETS

1. Set up -> Create -> Click Objects
2. Click on the Object you added the new field to, i.e. Territory Plan Partner (you may already be on this page)
3. Scroll down to Field Sets -> Click Edit



4. Drag the New Field into the “In the Field Set” area and Click Save.

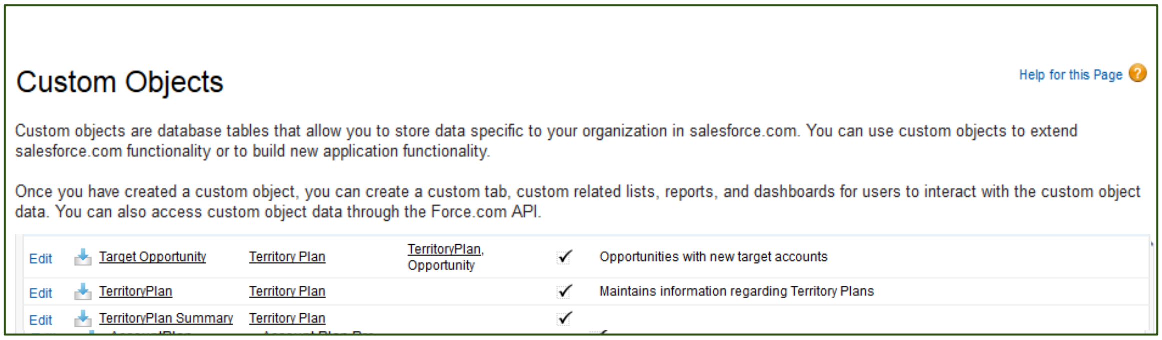




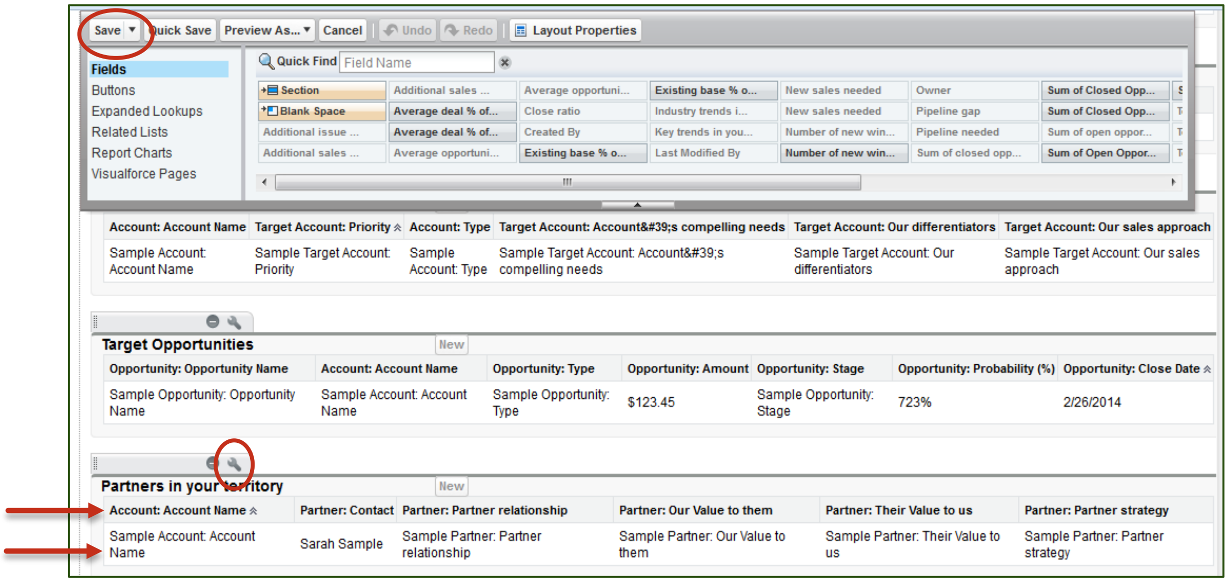
The new field will show up in the bottom section (Additional Information) in the edit page, i.e. Territory Plan Partner page.

OPTIONAL: ADD FIELDS TO SECTIONS

1. Set up -> Create -> Objects
2. Click on the Territory Plan object

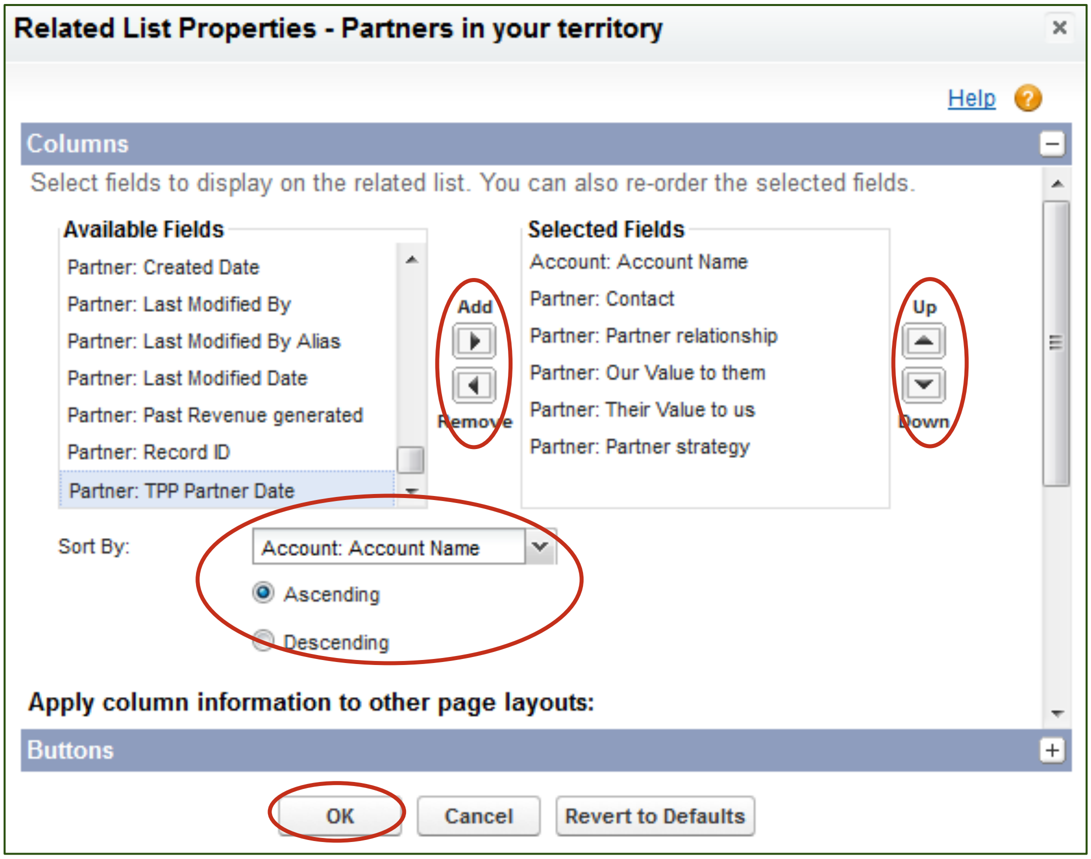


3. Scroll down to Page Layouts and click Edit to the left of the Page Layout you are using (typically the most recent one at the bottom of the list)
4. Scroll down and Click on the section you wish to modify, i.e. the Partner Section.
5. Click the wrench on top of the Section Label.

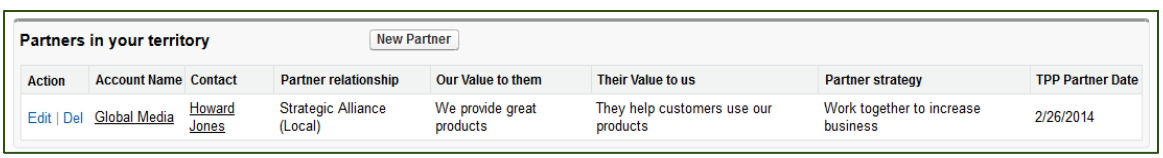


6. Select from the available fields on the left, click the Add button in the middle and the selected field will appear in the Selected Fields on the right.
7. You can remove fields from the Selected Fields using the Remove button.
8. Use the Up/Down arrows to put the fields in the desired order in the Section.
9. Select the field you want to sort by and if in Ascending or Descending order. Click OK at the bottom.

10. Click Save in the Territory Plan Layout screen.

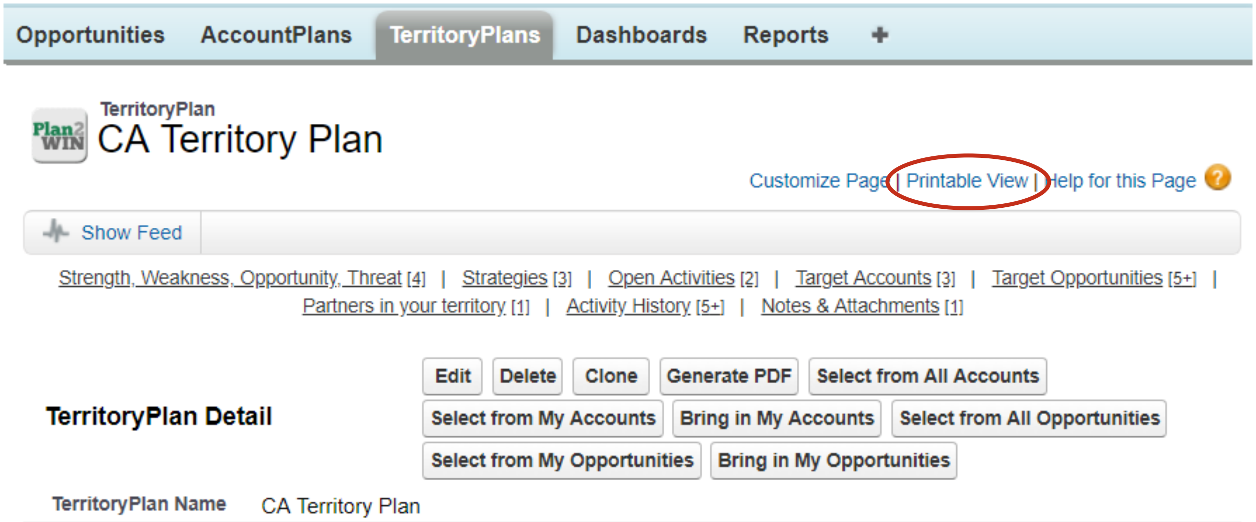


Your field is now in the section.



OPTIONAL: USE PRINTABLE VIEW

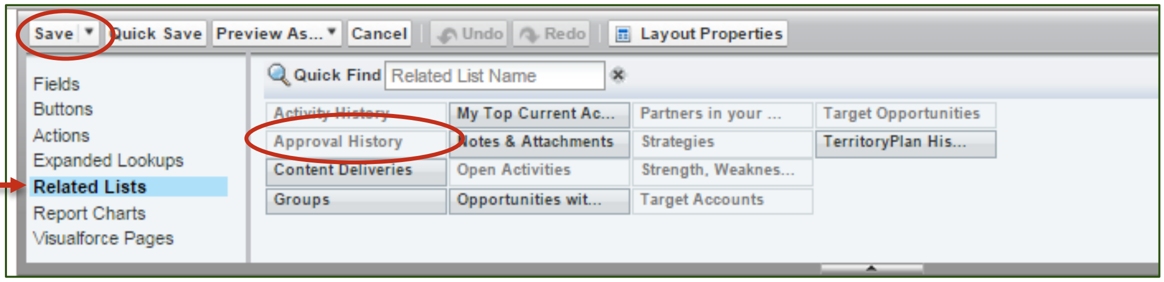
If you have made significant changes to the account plan user interface by adding, removing or changing some of the sections or adding, removing or changing fields and you want to print a copy of the account plan as you have changed it, you can use the "Printable View" function. It is in the top right of the account plan user interface (see below). Click "Printable View" and then follow instructions to print as you would like. If the user has pdf capability, they should be able to print to a pdf.



OPTIONAL: ADD APPROVAL HISTORY SECTION

You may want to add the Approval History Section to your page layout. In it you, the system administrator, can add workflows to enable approval of plans.

1. Go to: Setup -> App Setup -> Create -> Objects
2. Click on TerritoryPlan.
3. Scroll down to Page Layouts and click edit to the left of the most recent Page Layout Name.
4. Click Related Lists on the left of the section at the top.
5. Drag Approval History to where you want it to be in the page layout; usually the bottom.
6. Set up the Approval history section as you want it to be, including workflows for approval, and click Save

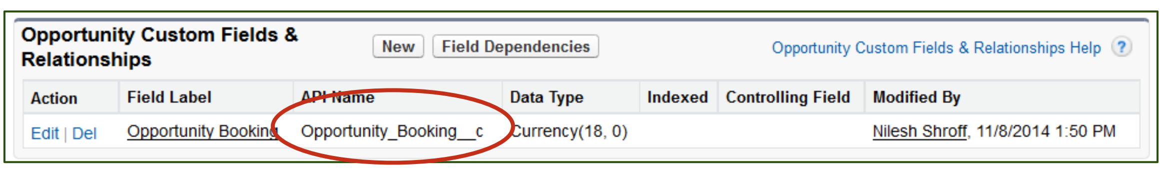


OPTIONAL: CHANGE TO A CUSTOM OPPORTUNITY AMOUNT FIELD

If you use a custom opportunity amount field, here is how you can use that field in the Territory Plan Sums and other features.

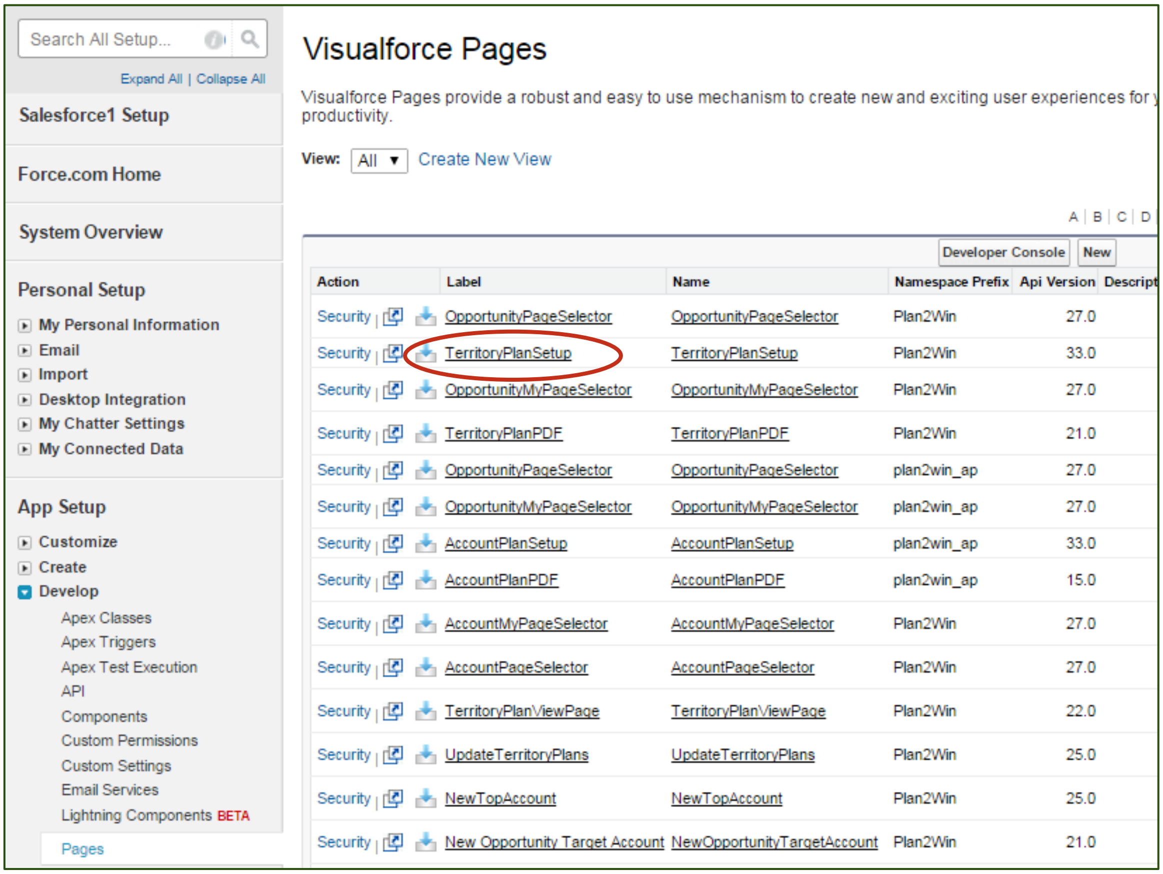
If the custom amount field, here is how you can set it up… associated with the Opportunity object.

1. Setup -> App Setup -> Customize -> Opportunity -> Fields
2. On the Opportunities Fields page, scroll down to the Opportunity Custom Fields and Relationships section
3. Click New
4. Follow the instructions to create the new amount field you desire.
5. When you are done, it will show up in the Opportunity Custom Fields and Relationships section.
6. Note the API name as you will need it in the next step.



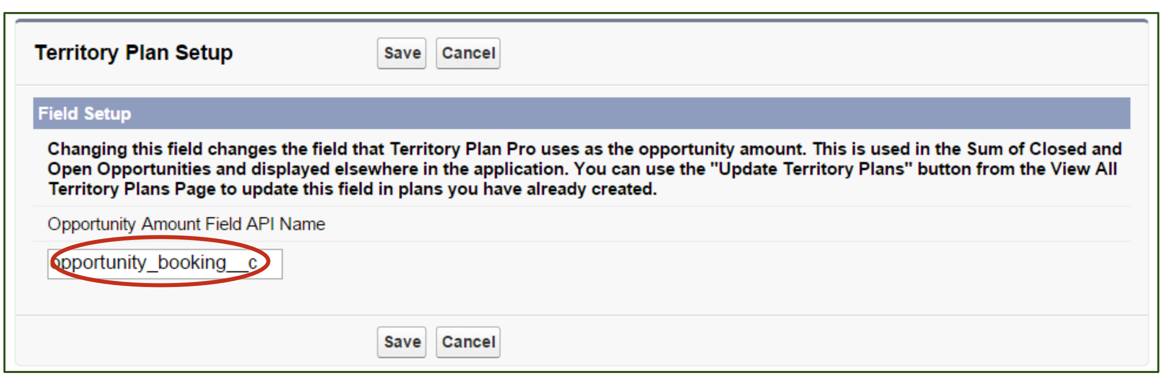
With your custom amount field set Up (you may have had it set up), here is how you proceed.

1. Setup -> App Setup -> Develop -> Visualforce Pages
2. Click TerritoryPlanSetup



On the Visual Force page: plan2win_TerritoryPlanSetup:

1. Click Preview in the middle of the top of the page.
2. Enter the API name of your custom opportunity amount field.
3. Click Save. See below.



To add your custom opportunity amount field to the Territory Plan Opportunity Section, see the topic: Adding Fields to Sections in this guide.

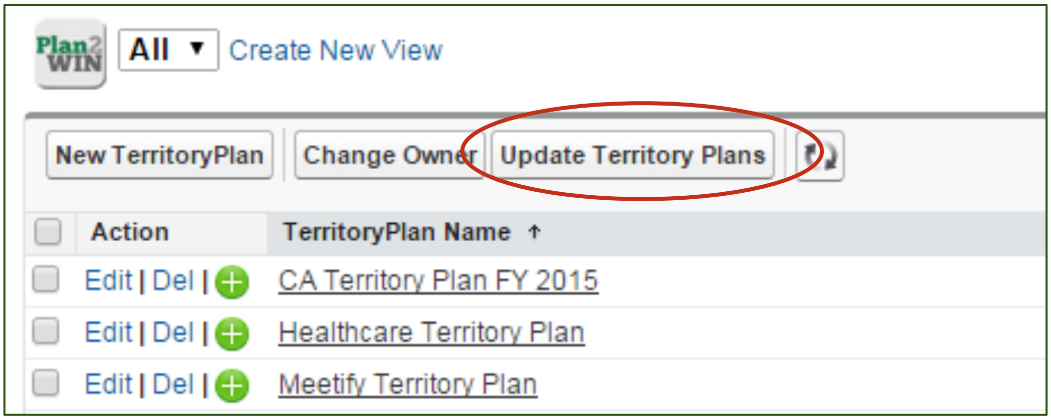
OPTIONAL: UPGRADE APP, UPDATING TERRITORY PLANS

If your team has created plans prior to you setting up the plans to use your custom opportunity amount field, update plans as follows.

This only needs to be done once - after you have made the above change.

1. Click on the TerritoryPlans tab then click the Go! button.

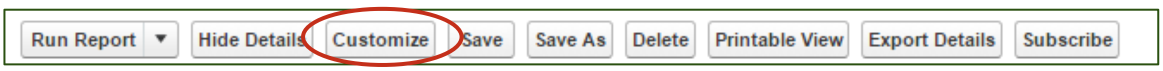
2. Click update Territory Plans



You may want to add your custom opportunity amount into our reports and dashboard.

CHANGING REPORTS:

1. Click the reports tab.
2. In the Folders section, click Territory Plan Reports.
3. Click on a report that uses the amount field.
4. Click Customize



5. Scroll down on the left side until you find your custom opportunity amount field. Drag it where you want it to be in the report.
6. You may want to remove the Amount field.
7. Set up the report as you wish and Click Save. You may want to rename the report.

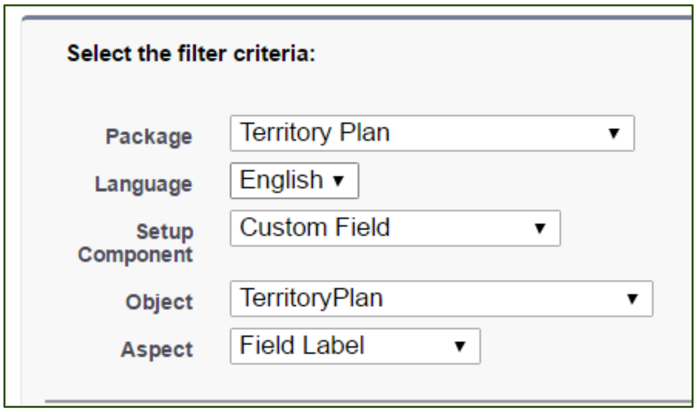
CHANGING DASHBOARD:

1. Click the Dashboards tab.
2. In the drop-down menu, click Territory Plan Dashboard.
3. Click Edit and add in the new or modified reports. You may want to remove some of the standard reports.

OPTIONAL: TRANSLATION WORKBENCH TO CHANGE FIELD AND RELATED LIST LABELS

WORKING WITH TRANSLATION WORKBENCH TO CHANGE FIELD LABELS.

1. Go to Set Up -> under Administration Set Up -> Translation Workbench -> Override.
2. On that page, under Select filter criteria:
   Package: Territory Plan
   Set up component: Custom field
   Object: choose from drop down
   Aspect: Field label



3. Find the Master field label you want to change
4. Under Field label override, click in the box to make the change and type in the new field label.
5. Save.

Master Field Label	Field Label Override	Field Type
Additional issue / info to consider		Long Text Area(2000)
Additional sales from existing base		Currency(18, 0)

WORKING WITH TRANSLATION WORKBENCH TO CHANGE RELATED LIST LABELS

1. Go to Set Up -> under Administration Set Up -> Translation Workbench -> Override.
2. On that page, under Select filter criteria:
   Package: Territory Plan
   Set up component: Custom field
   Object: choose from drop down

Aspect: Related List label
See below.

Select the filter criteria:

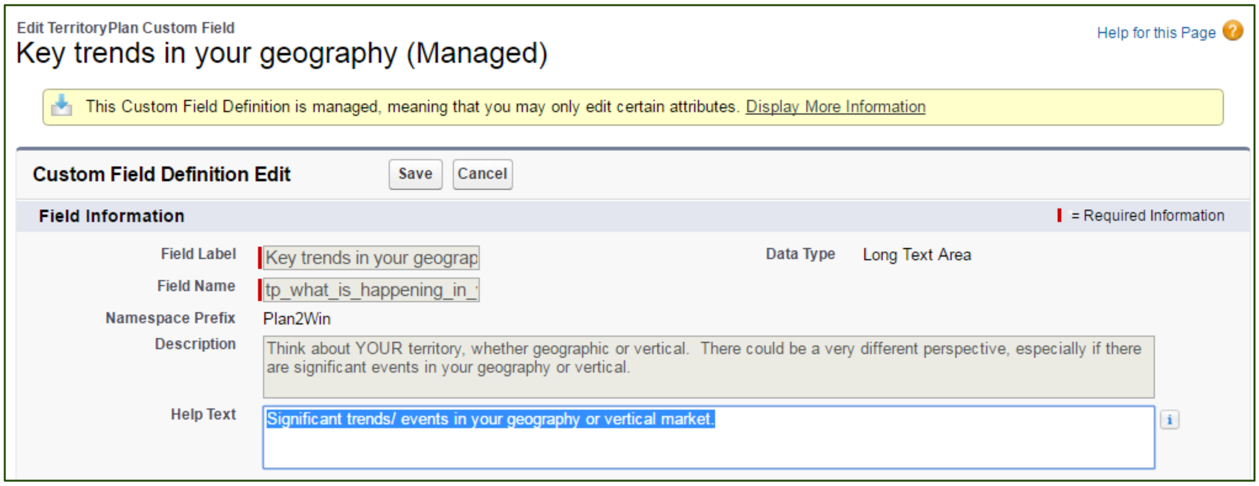
Package	Territory Plan
Language	English
Setup Component	Custom Field
Object	Target Account
Aspect	Related List Label

3. Find the Master field label you want to change
4. Under Field label override, click in the box to make the change and type in the new field label.
5. Save.

Master Related List Label	Related List Label Override	Custom Field Label
Target Accounts		TerritoryPlan
Target Accounts (Account)		Account

OPTIONAL: CHANGE HELP TEXT

1. Go to Set Up -> Create -> Objects.
2. Click on the Object in which the field you want to change resides (i.e. TerritoryPlan, Strategy, SWOT, etc.).
3. Scroll down to Custom Fields and Relationships.
4. Select the Field (under Field Labels) for which you would like to change the help text. Click on the Field Label.
5. Click Edit.
6. In the Help Text box, type in the new Help Text you want.
7. Click Save.



INSTALLING UPGRADE: ENABLE CHATTER

In some cases, you may need to enable Chatter to install the upgrade.

Go to Set Up -> Quick Find/Search: type in: Chatter Settings

Click Chatter Settings -> Click Edit: In Chatter Settings section, click Enable -> Save.

INSTALLING UPGRADE: ENABLE LIGHTNING APP BUILDER

Go to Set Up -> Quick Find/Search: type in: Lightning App Builder

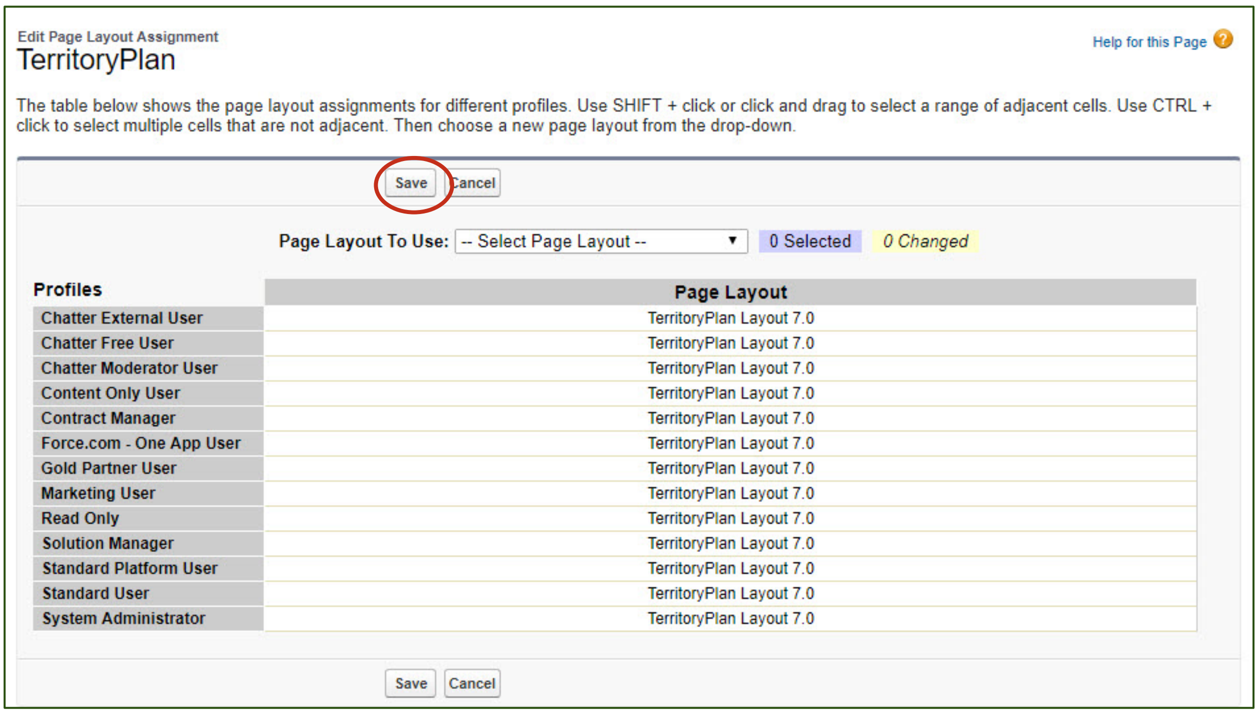
Click Lightning App Builder -> Enable -> Save.

This feature should already be enabled in the org. If it is not, enabling it is not the same as requiring your users to use Lightning. They can still use the Classic UI.

UPGRADE FROM A PREVIOUS REV: CHANGE PAGE LAYOUT

This is especially important if some or all of your users use the Lightning User Interface.

1. Go to Set Up -> Create -> Click Objects
2. Click Territory Plan
3. Click Page Layouts
4. On the far right of the screen, click Page Layout Assignment
5. Click Edit Assignment
6. Select the Profiles that will be using Territory Plan Pro
7. Select Page Layout to use: Page Layout 7.0. Click Save



UPGRADE FROM PREVIOUS REV: CHANGE RELATED LIST PAGE LAYOUTS

This is especially important if some or all of your users use the Lightning User Interface.

Here are the Related List objects that you will want to change the page layout for.

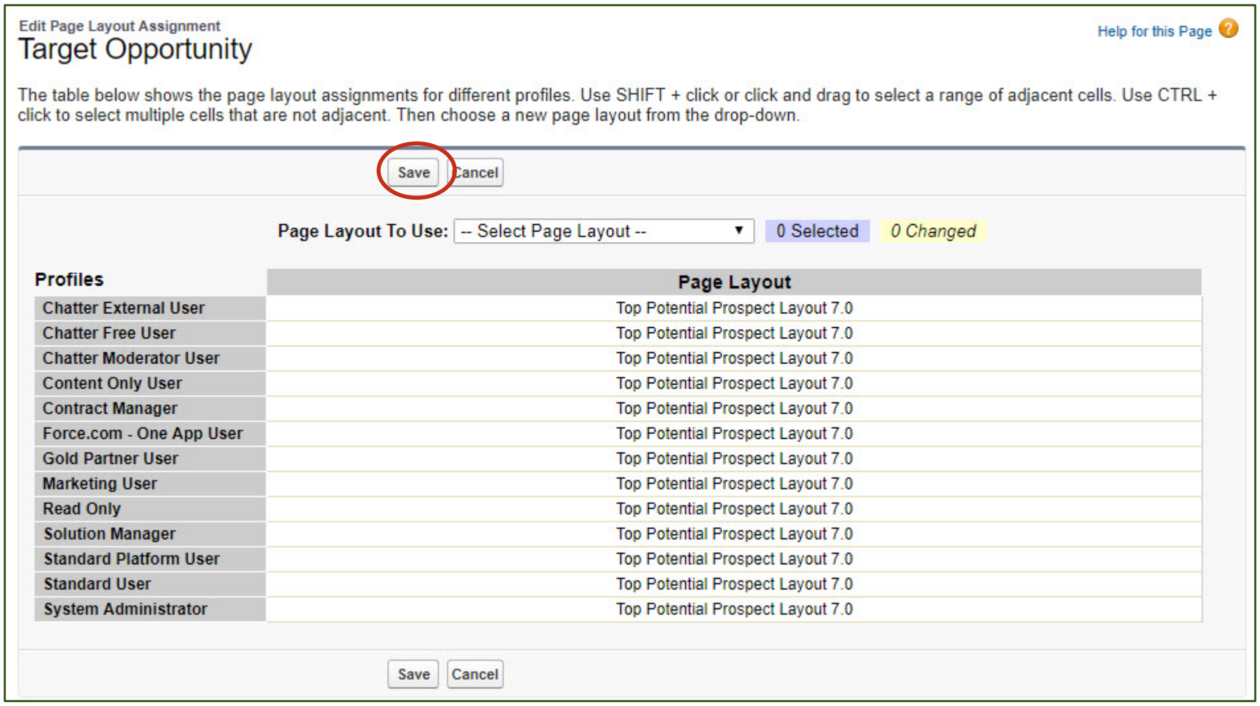
1. Go to Set Up -> Create -> Click Objects
2. Select the objects associated with the Territory Plan object shown below.

New Custom Object | Schema Builder

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Account Plan Setup	Account Plan Pro		✓	
Edit	AccountPlan	Account Plan Pro		✓	
Edit	AccountPlan Opportunity	Account Plan Pro	AccountPlan, Opportunity	✓	
Edit	AccountPlan Partner	Account Plan Pro	Account, AccountPlan	✓	
Edit	AccountPlan Relationship	Account Plan Pro	AccountPlan, Contact	✓	
Edit	AccountPlan Summary	Account Plan Pro		✓	Internal Object used primarily for analytic snapshots
Edit	AccountPlan Team Member	Account Plan Pro	AccountPlan	✓	
Edit	Ad Group	Salesforce for Google AdWords		✓	A Google Ad Group is a collection of Text Ads and Keywords
Edit	Google Campaign	Salesforce for Google AdWords		✓	Google AdWords Campaigns are high-level marketing initiatives
Edit	Keyword	Salesforce for Google AdWords		✓	Keywords are the terms purchased in Google AdWords
Edit	Opportunity with Current Account	Territory Plan	TerritoryPlan, Opportunity	✓	Opportunities with existing accounts
Edit	Partner	Territory Plan	TerritoryPlan, Account	✓	Who are the Alliance partners you intend to utilize to penetrate accounts in your territory?
Edit	SFGA Version	Salesforce for Google AdWords		✓	This object is for administrative purposes only and records the current version of the Salesforce for Google AdWords application. Do not edit this object.
Edit	SWOT	Account Plan Pro	AccountPlan	✓	
Edit	SWOT	Territory Plan	TerritoryPlan	✓	
Edit	Search Phrase	Salesforce for Google AdWords		✓	Search Phrases are the search terms or phrases the user types into a search box
Edit	Strategy	Account Plan Pro	AccountPlan	✓	
Edit	Strategy	Territory Plan	TerritoryPlan	✓	
Edit	Target Account	Territory Plan	Account, TerritoryPlan	✓	New potential accounts
Edit	Target Opportunity	Territory Plan	TerritoryPlan, Opportunity	✓	Opportunities with new target accounts
Edit	Territory Plan Setup	Territory Plan		✓	
Edit	TerritoryPlan	Territory Plan		✓	Maintains information regarding Territory Plans
Edit	TerritoryPlan Summary	Territory Plan		✓	
Edit	Text Ad	Salesforce for Google AdWords		✓	Text Ads are the advertising copy that displays on the search results page
Edit	Top Current Account	Territory Plan	TerritoryPlan, Account	✓	My top performing accounts

Here is how to update the page layout:

1. Go to Set Up -> Create -> Click Objects
2. Click Related List object (i.e. Target Opportunity)
3. Click Page Layouts
4. On the far right of the screen, click Page Layout Assignment
5. Click Edit Assignment
6. Select the Profiles that will be using Territory Plan Pro
7. Select Page Layout to use: Page Layout 7.0. Click Save


Edit Page Layout Assignment

Target Opportunity

Help for this Page

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Save Cancel

Page Layout To Use: -- Select Page Layout -- 0 Selected 0 Changed

Profiles	Page Layout
Chatter External User	Top Potential Prospect Layout 7.0
Chatter Free User	Top Potential Prospect Layout 7.0
Chatter Moderator User	Top Potential Prospect Layout 7.0
Content Only User	Top Potential Prospect Layout 7.0
Contract Manager	Top Potential Prospect Layout 7.0
Force.com - One App User	Top Potential Prospect Layout 7.0
Gold Partner User	Top Potential Prospect Layout 7.0
Marketing User	Top Potential Prospect Layout 7.0
Read Only	Top Potential Prospect Layout 7.0
Solution Manager	Top Potential Prospect Layout 7.0
Standard Platform User	Top Potential Prospect Layout 7.0
Standard User	Top Potential Prospect Layout 7.0
System Administrator	Top Potential Prospect Layout 7.0

Save Cancel