Installation Guide for Next Quarter Platform

OCTOBER 2022

CONTENTS

1. Introduction

This document will help you install and configure the Sales Forecasting, Sales Methodology, and Account Planning Suite 1.0 effectively and efficiently.

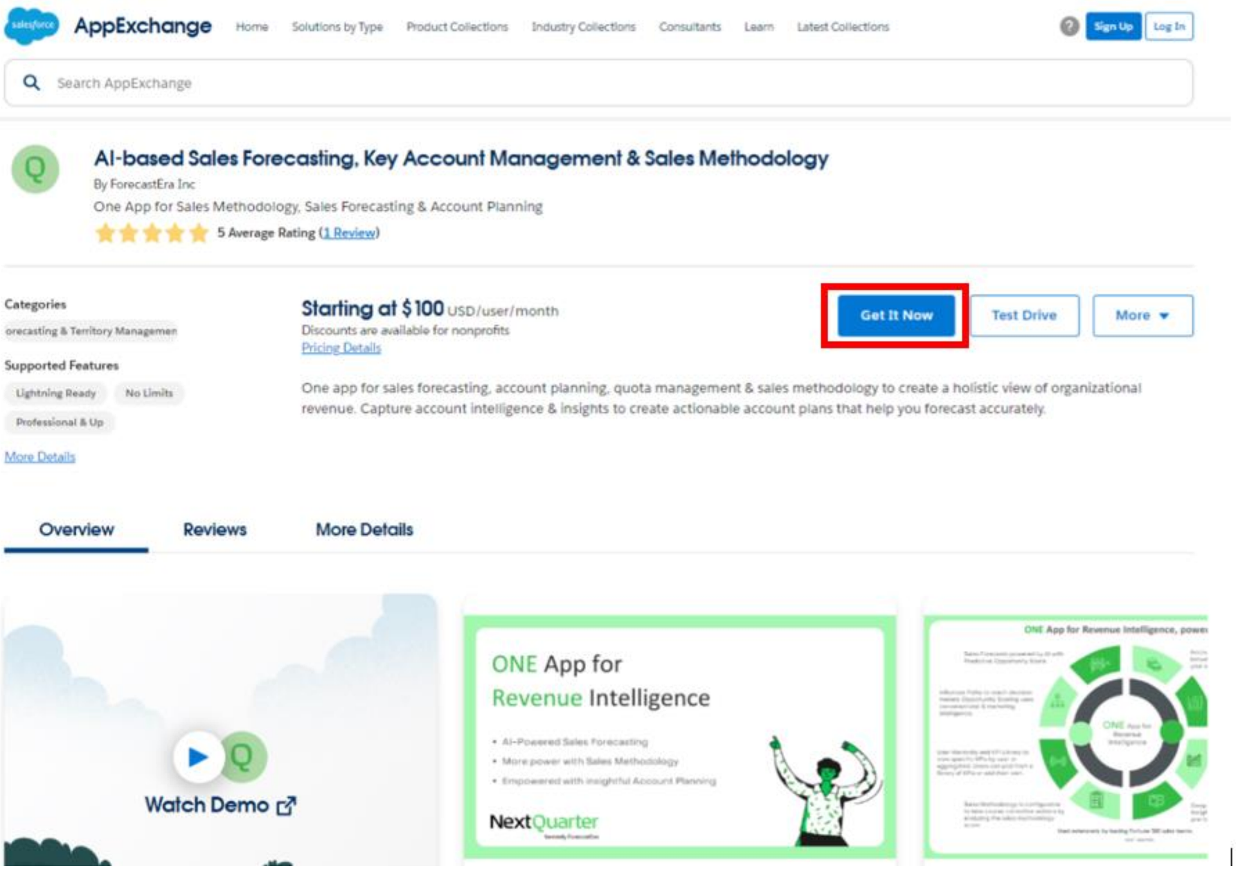
2. Prerequisite

Before you download the Next Quarter Sales Forecasting, Sales Methodology, and Account Planning Suite 1.0, the user must –

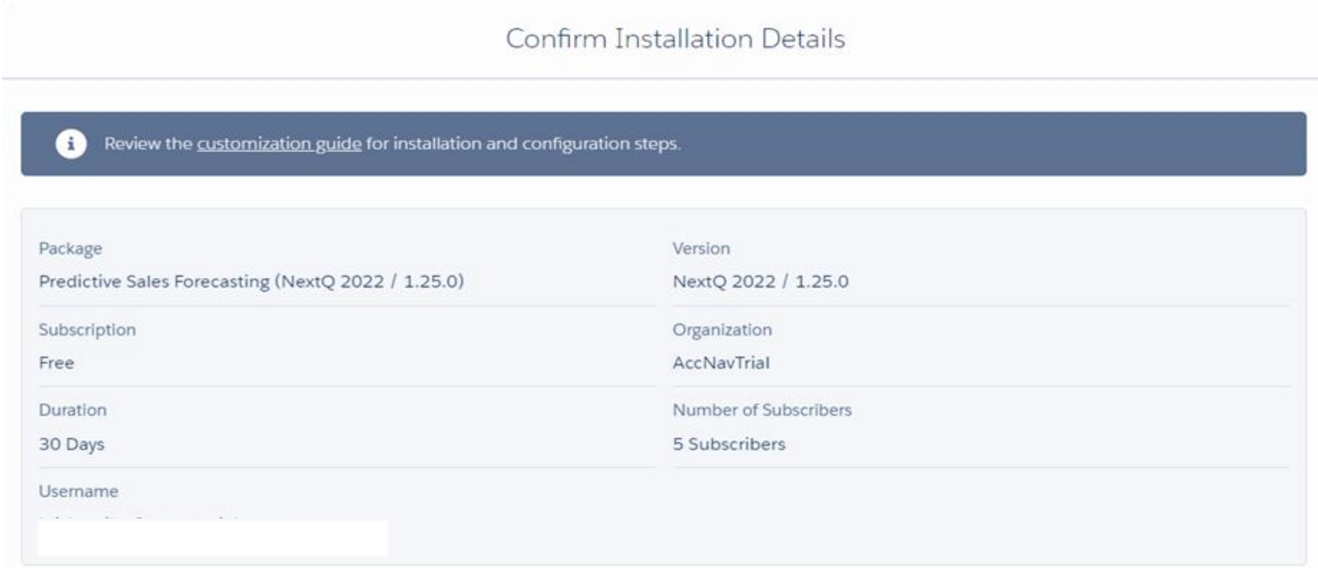
1. Navigate to the AppExchange listing page (*AI-based Sales Forecasting, Key Account Management & Sales Methodology - ForecastEra Inc - AppExchange (salesforce.com)https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EodItUAJ* for the Next Quarter Sales Forecasting, Sales Methodology, and Account Planning Suite 1.0.
2. Have Admin access to the Salesforce org (Production or Sandbox).
3. Have Admin access to install the Sales Forecasting, Sales Methodology, and Account Planning Suite 1.0.

3. Installation Steps

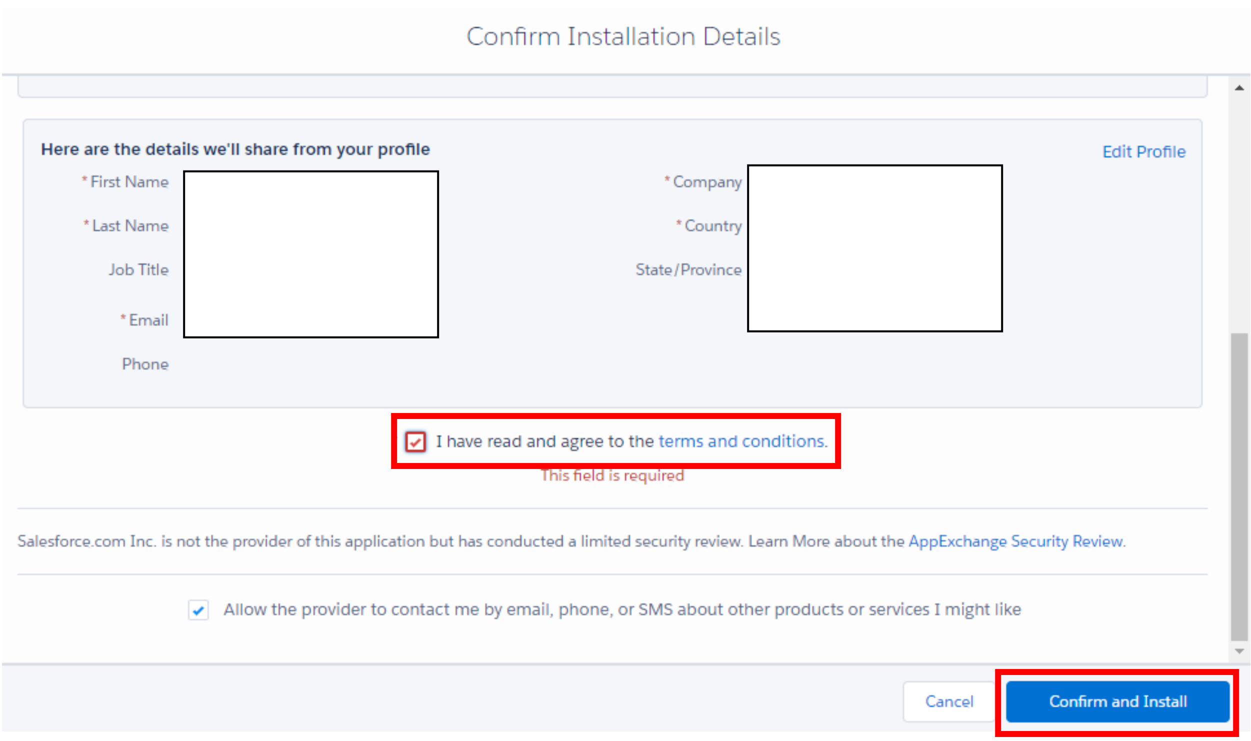
Once you have logged in to Salesforce, go to the AppExchange listing for the suite and click on ***Get It Now*** (outlined in red) to begin the installation.



You will be taken to the ***Confirm Installation Details*** popup.

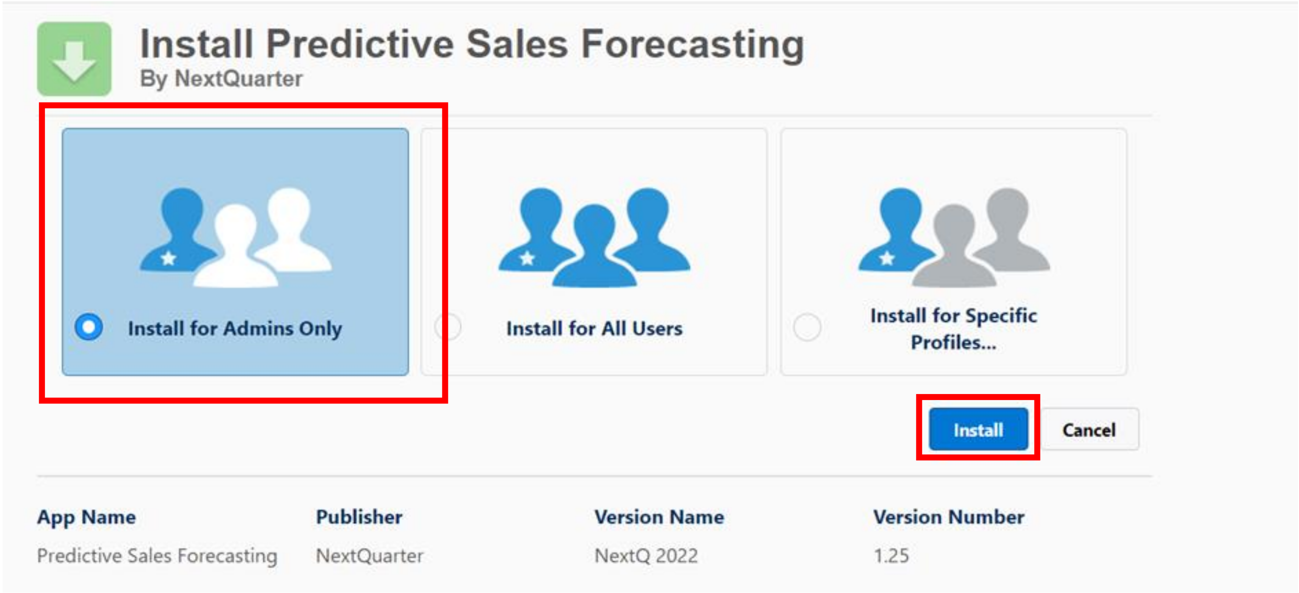


After the details have been populated from your profile, check the ***I have read and agree to the Terms and conditions*** box and click on ***Confirm and Install*** (all outlined in red) to Proceed.

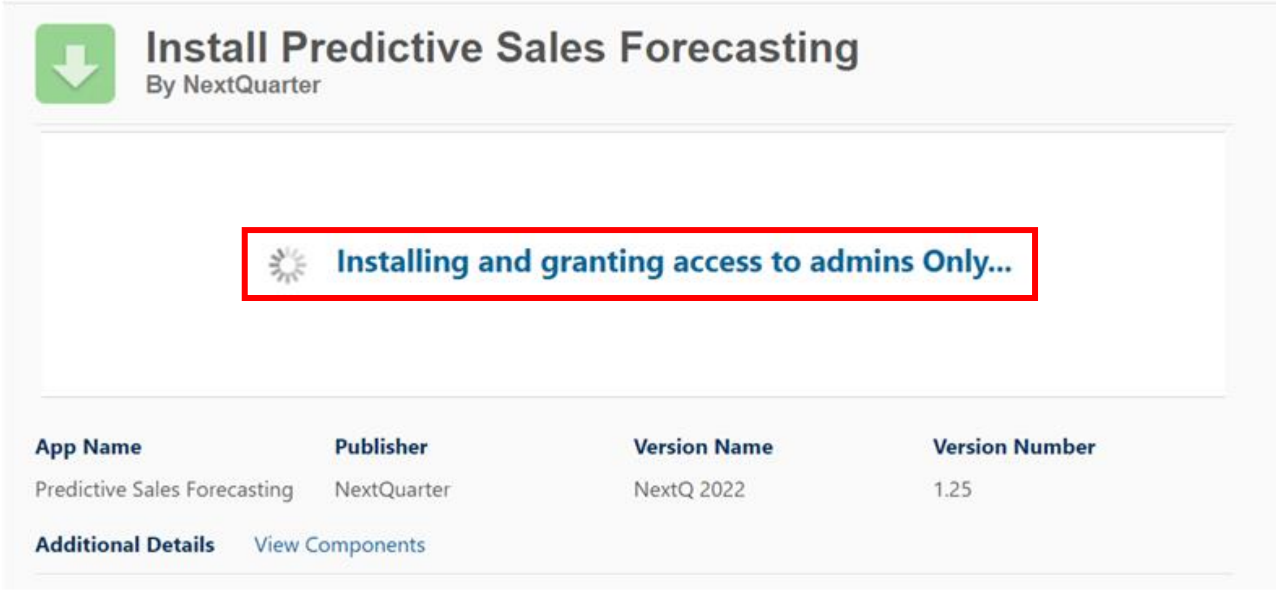


On Clicking the button, the user will be taken to the ***Install Predictive Sales Forecasting*** screen.

Select ***Install for Admins Only*** and click the ***Install*** button (outlined in red) to begin the installation.



*Note – This guide illustrates the admin-only steps. Users can select the three options for the profiles they wish to install.



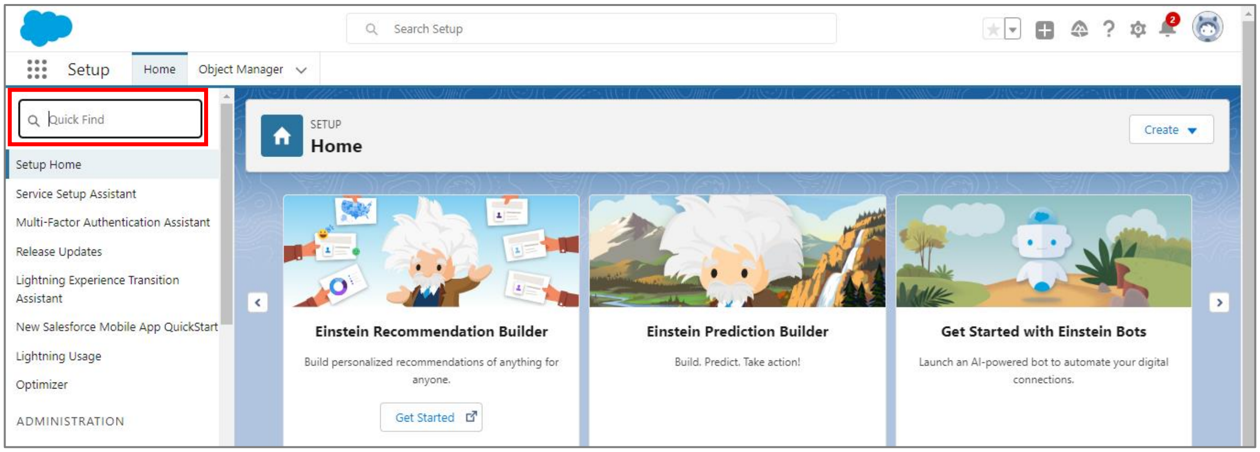
The application installation waiting screen will be displayed, and you may see the notification (outlined in red).

4. Post Installation Steps

Once the application has been installed, the admin must complete two post-installation steps.

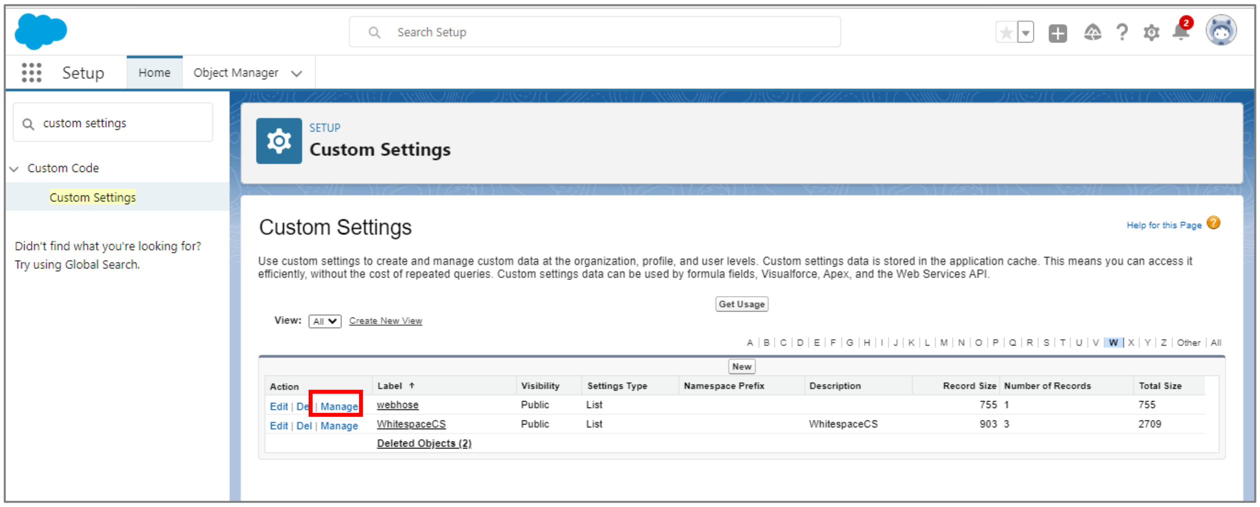
4.1. Custom Settings Setup

Navigate to the Setup page, and search for **Custom Settings** on the **Quick Find** box (outlined in red).



On the Custom Settings, locate the webhose custom setting, and click on **Manage** (outlined in red).

*Note - webhose.io is now webz.io

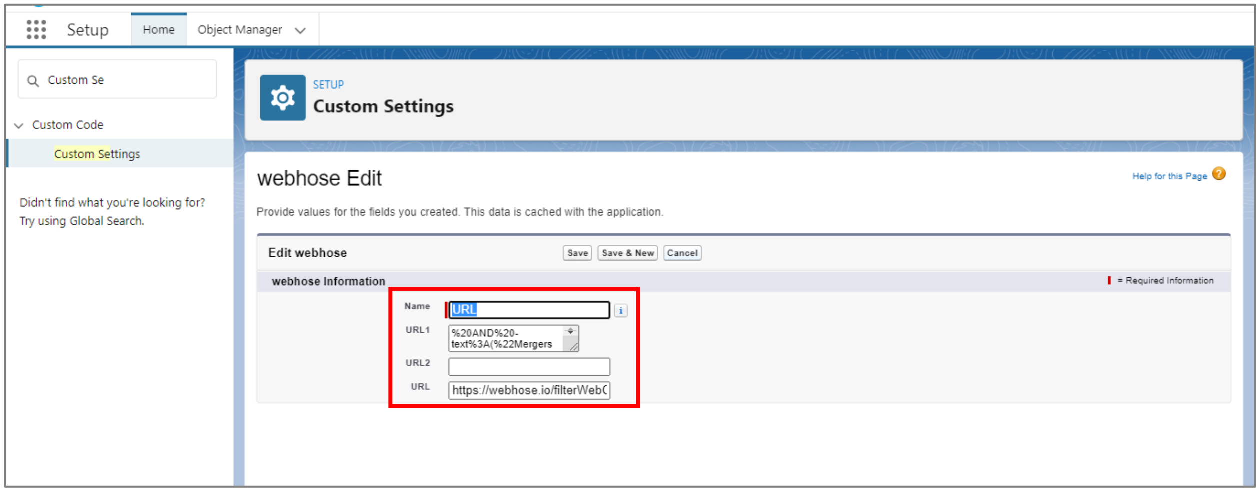


On the screen, click on **New** and enter the following details.

Name - **URL**

URL 1 - %20AND%20-text%3A(%22Mergers%20%26%20Acquisitions%22%20OR%20%22Digital%20Health%20Solutions%22%20OR%20%22Future%20of%20Work%22%20OR%20%22Pension%20Risk%20Management%22%20OR%20%22HR%20Transformation%22%20OR%20%22Global%20Investment%20Research%22)

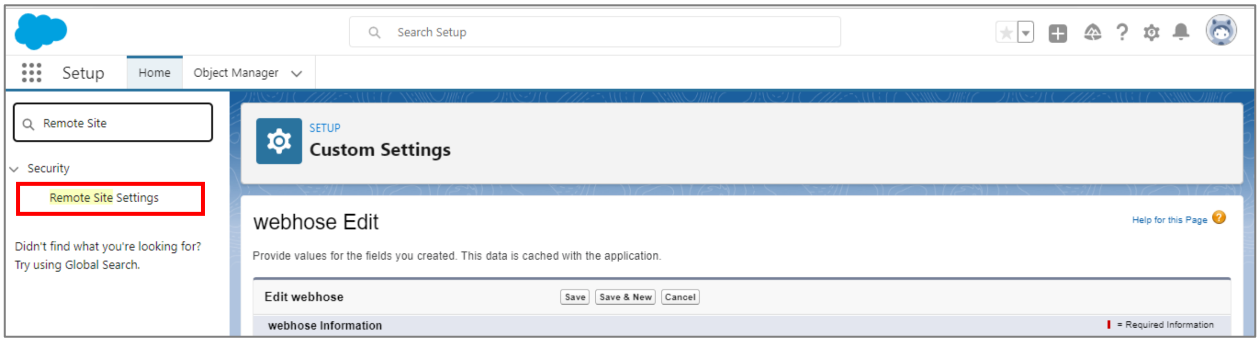
URL - *https://webhose.io/filterWebContent?token=2f534ac8-8a84-437a-81f2-7bb6ae12875d&format=json&size=50&ts=1589881583057&sort=crawled&q=thread.title%3A*



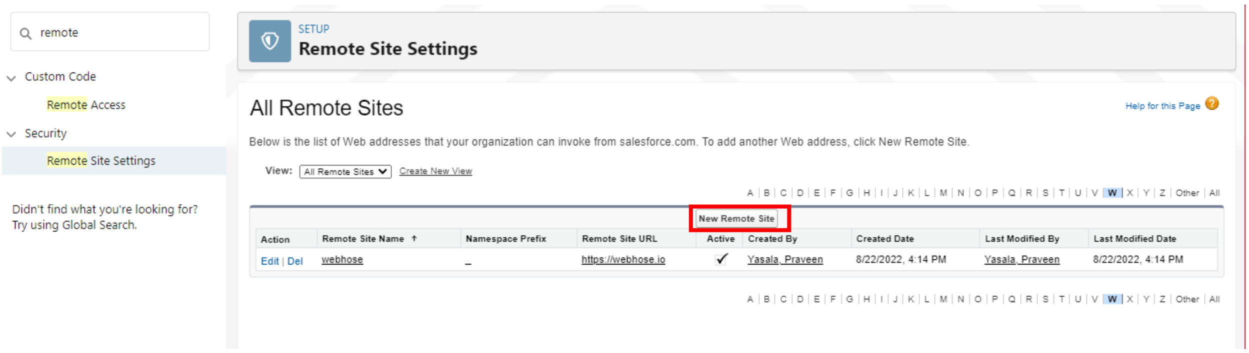
4.2. Remote Site Settings

The admin must complete the second post-installation step, the Remote Site Settings. The Remote Site Setting allows Salesforce to make a callout to webhose.io API and obtain the data.

Click on the Quick Find box, search for **Remote Site Settings**, and click on the link (outlined in red) to navigate the page.



Click the New Remote Site button on the Remote Site Settings page (outlined in red).



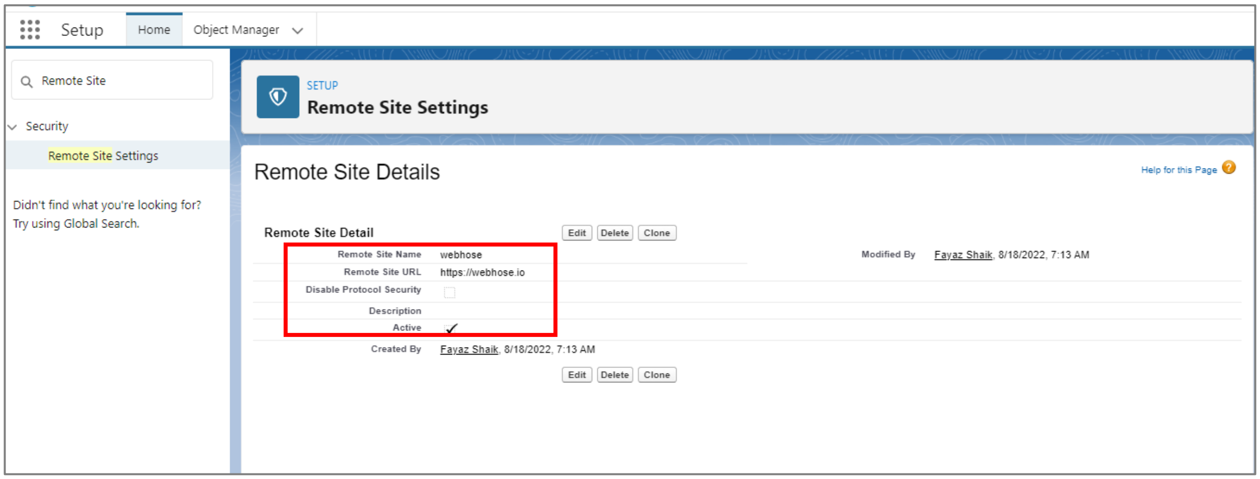
Enter the following details –

Name – Webhose

Remote Site URL - *https://webhose.io*

Active – true

Q

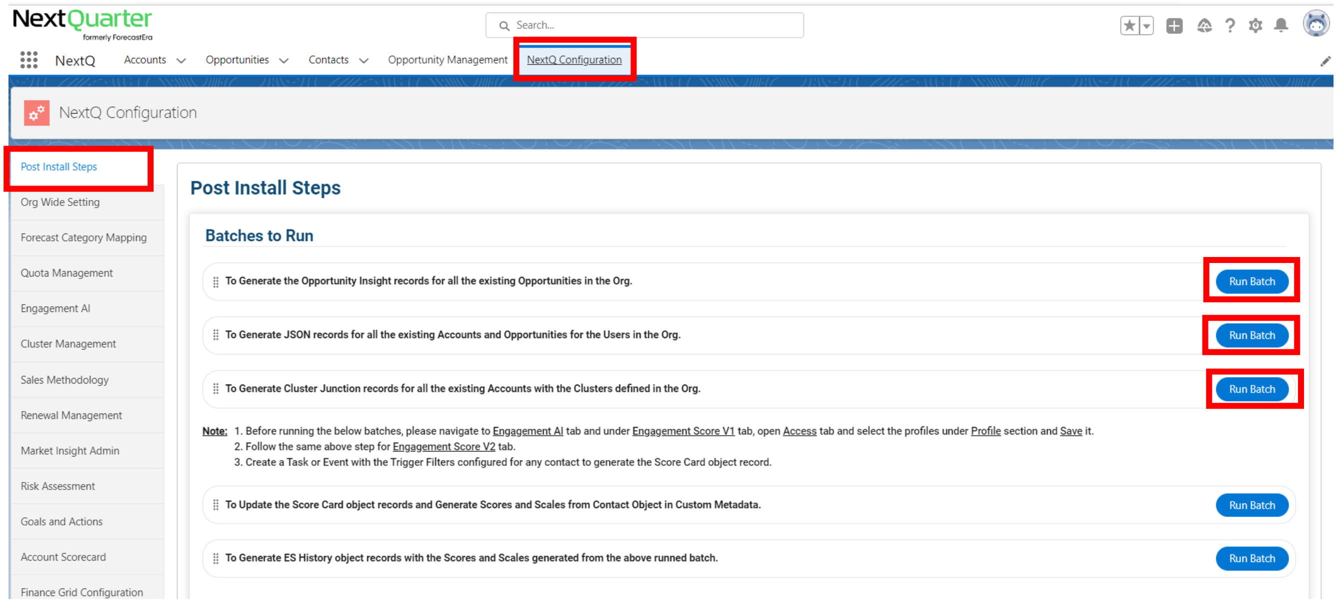


The post-installation steps are now complete.

5. Configuration Steps

5.1. Post Install Steps

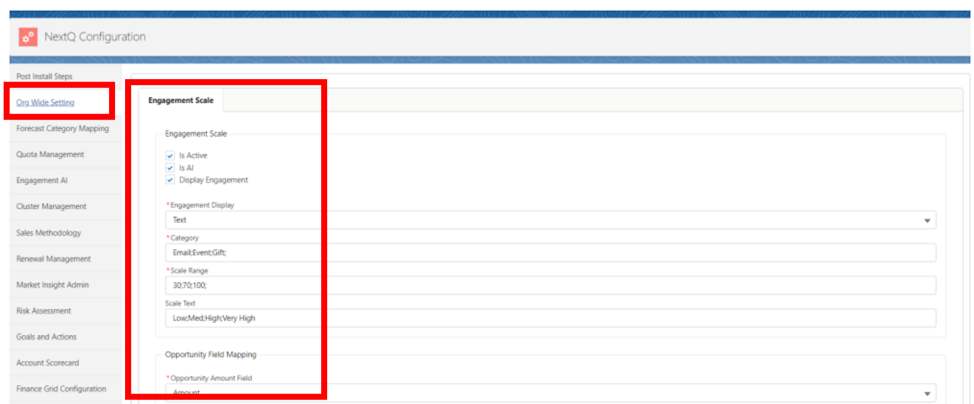
a. Open the NextQ Configuration page, by clicking on the tab, and click on the **Post Install Steps** tab (both outlined in red).



b. Click on the **Run Batch** button (outlined in red) to generate the Opportunity Insights records, JSON, and Cluster Junction records for the historical data in the org.

5.2. Org Wide Setting

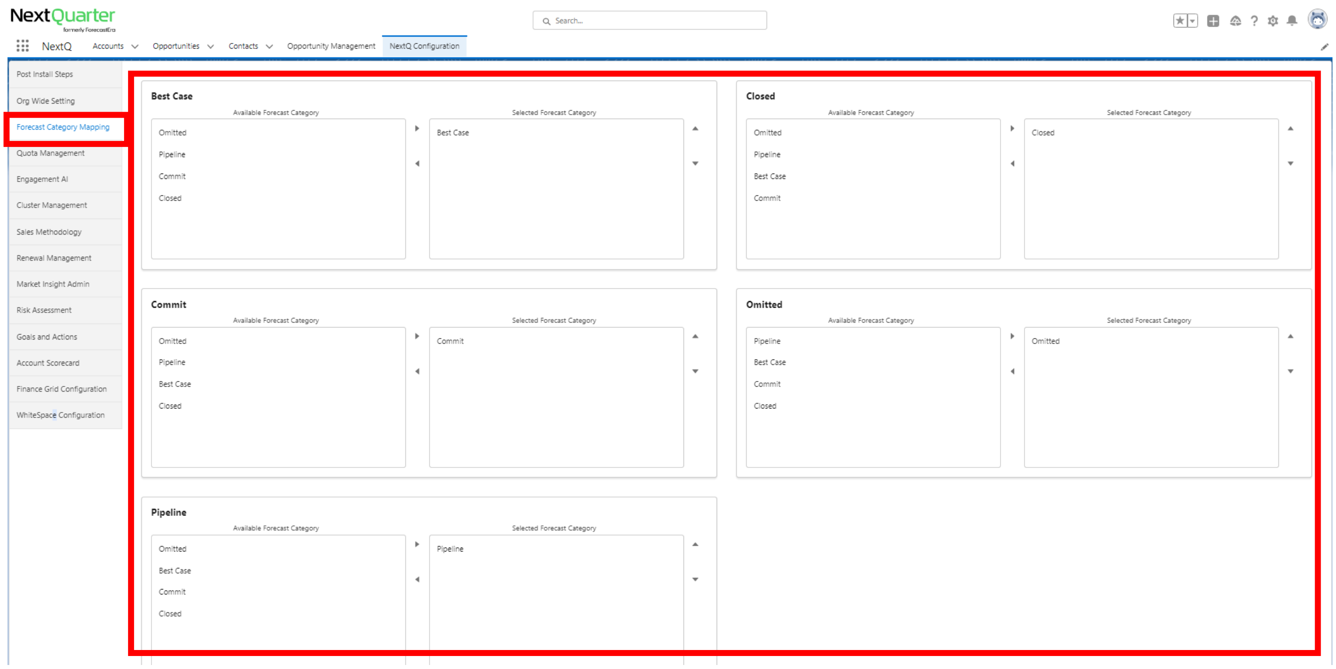
a. Navigate to the Org Wide Setting tab under the NextQ Configuration page.



b. Field values are auto assigned by default on this page. Admins can configure the field values as per their requirements.

5.3. Forecast Category Mapping

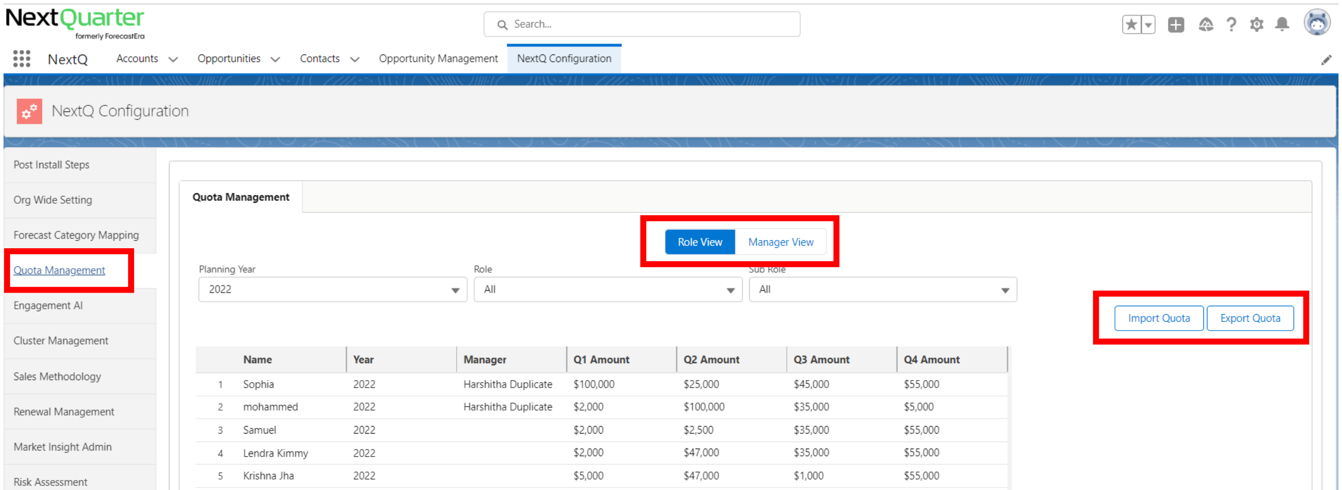
a. Navigate to the **Forecast Category Mapping** tab under the **NextQ Configuration** page.



b. Forecast Category values are assigned by default on this page. Admins can configure the values as per their requirements.

5.4. Quota Management

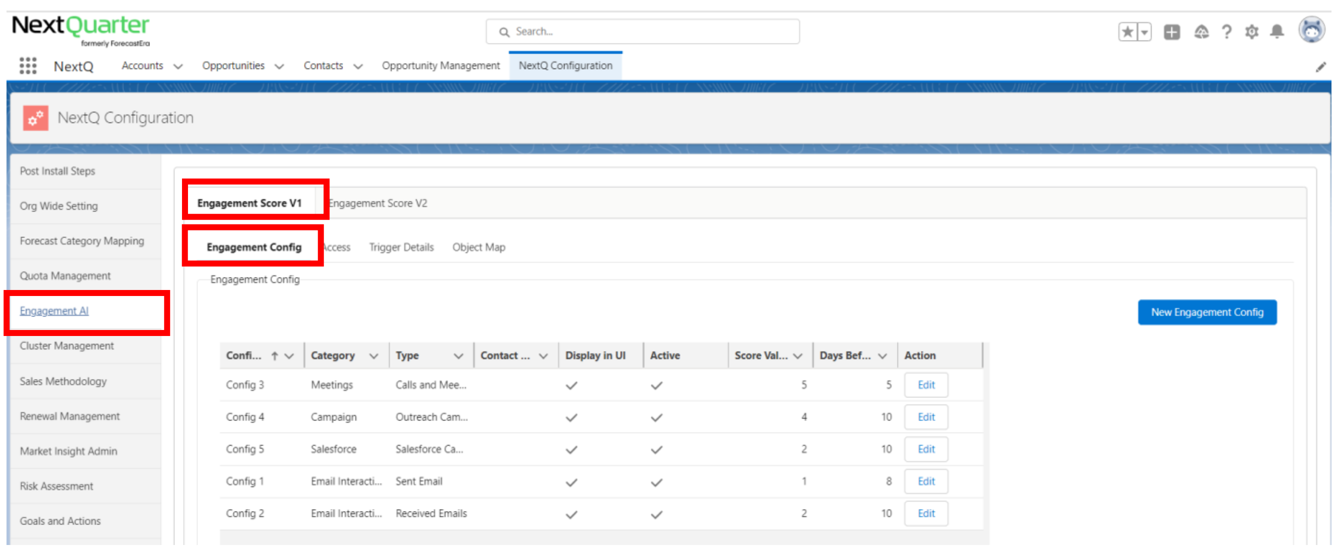
a. Navigate to the **Quota Management** tab under the **NextQ Configuration** page.



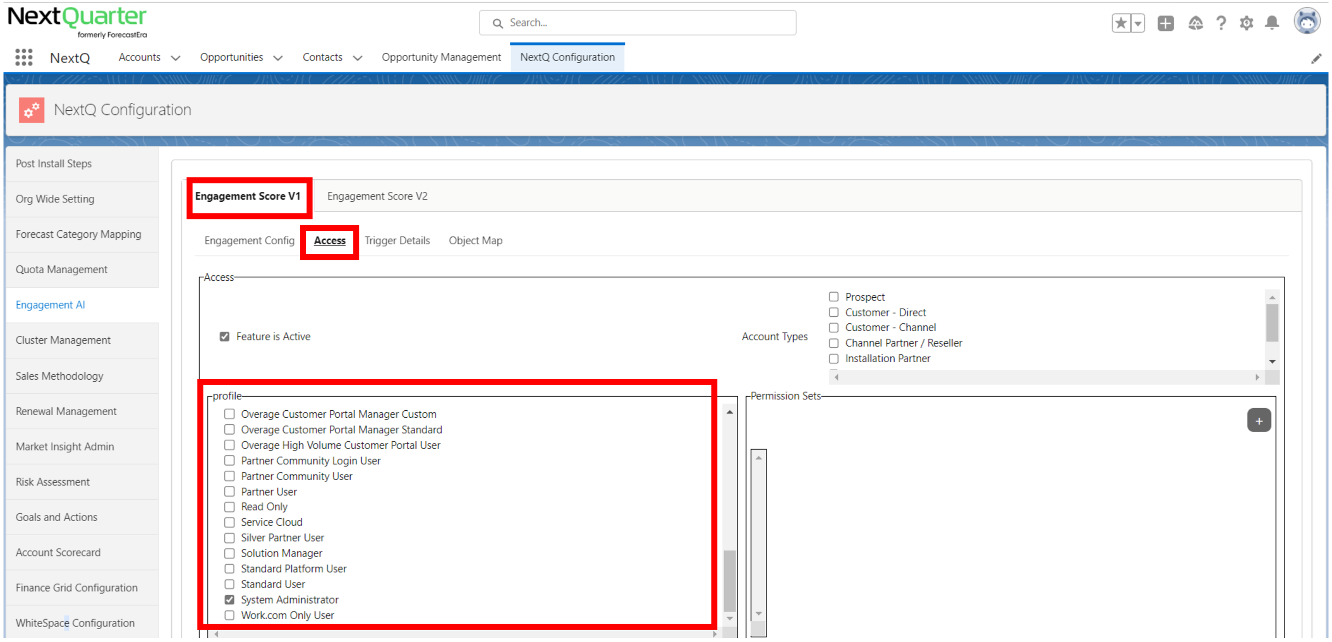
b. Admin can import and export quota data from the buttons (outlined in red) on the page and see the data as Role or Manager view (outlined in red).

5.5. Engagement AI

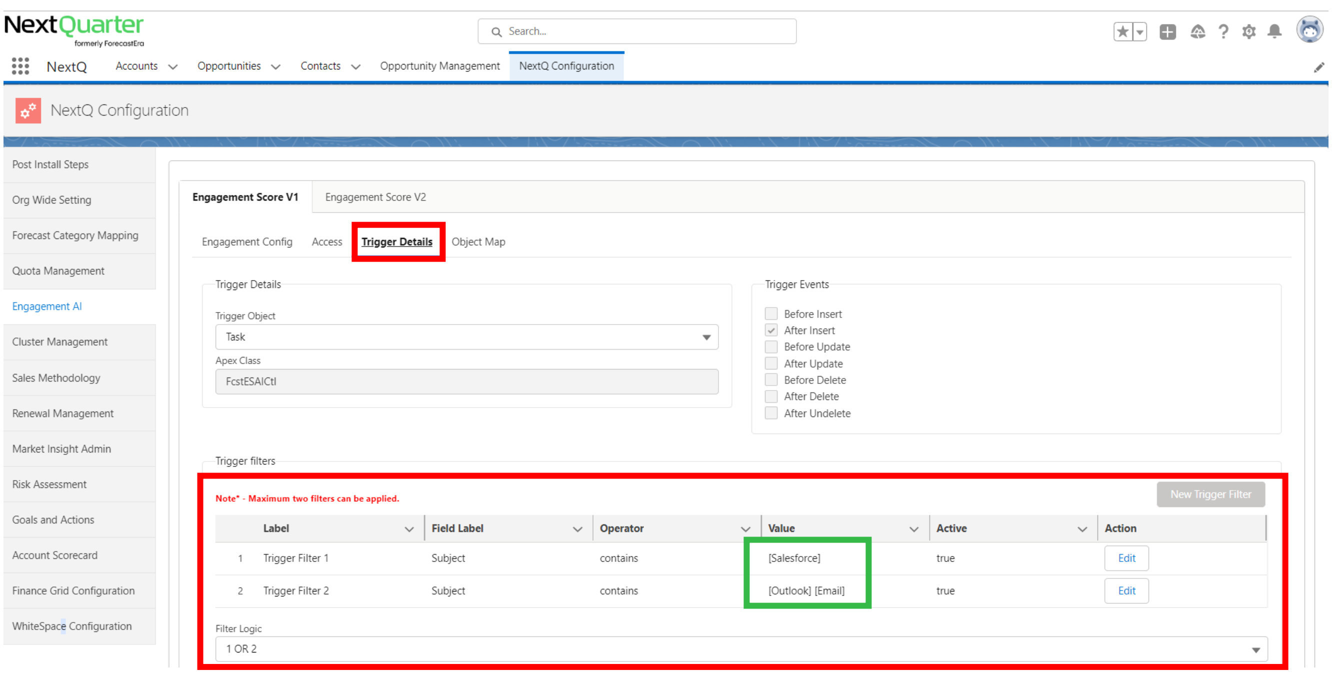
a. Navigate to the **Engagement AI** tab under the **NextQ Configuration** page.



b. On the **Engagement Config** sub-tab under **the Engagement Score V1 tab, configurations are specified by default to generate the number** of scorecards for Contacts with the score value. Admin can add the new config by clicking on the **New Engagement Config** button and make the default configuration inactive or change the values of the default configuration by clicking the **Edit** button as per their requirements.



c. Open the **Access** sub-tab under the **Engagement Score V1** tab, click on the checkbox to make the feature active (outlined in red), and select the profiles (outlined in red) to give feature access to the selected.



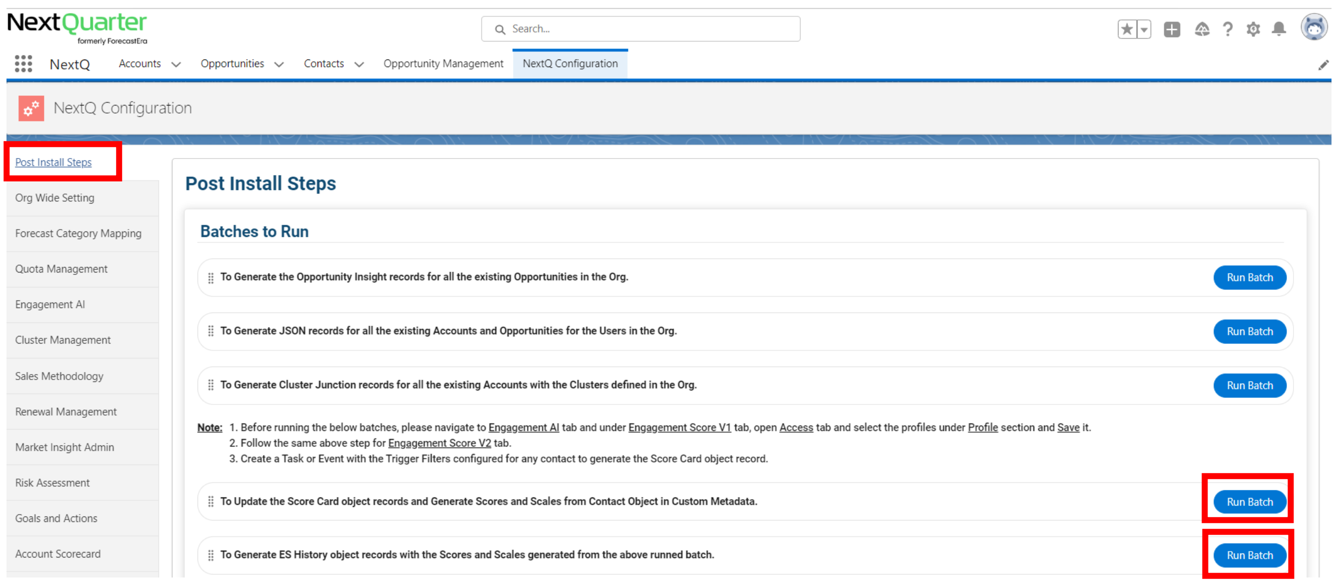
d. Open the **Trigger Details** sub-tab under the **Engagement Score V1** tab. Admins can modify the existing filter by clicking the **Edit** button and create the new filter by clicking the **New Trigger Filter** button. After adding/modifying the trigger filter values, choose the **Filter Logic,** and click the **Save** button to save the configuration.

e. Ensure that the value or text (outlined in green) matches the subject or any selected field on the task record.

*Note – Only two trigger filters can be added.

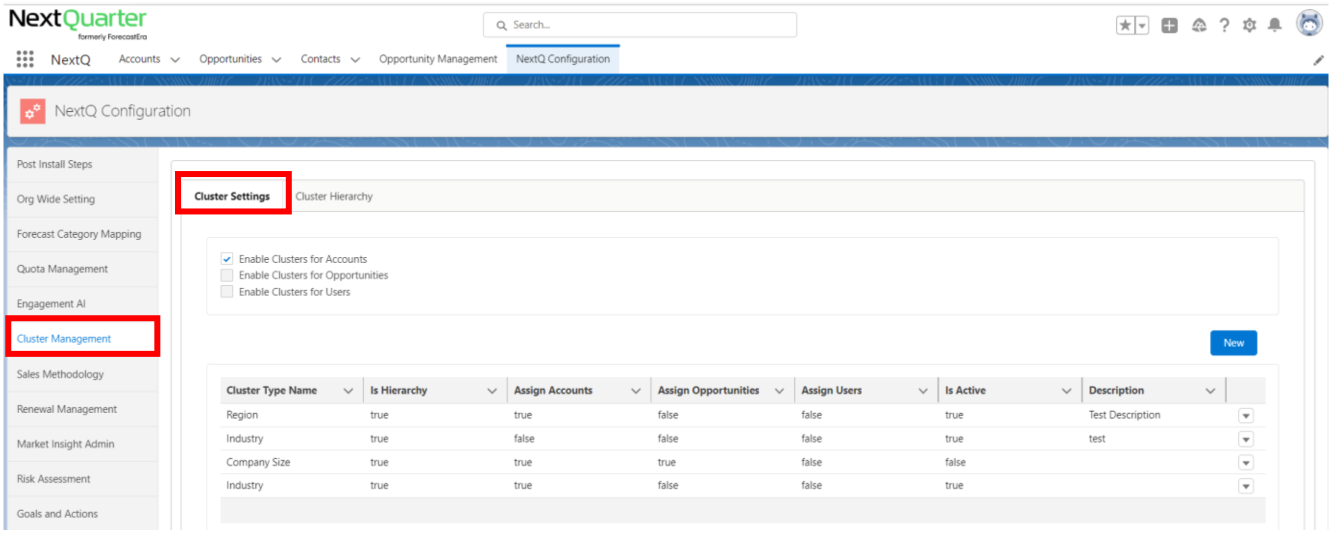
*Note – Admins must complete the same steps to configure **Events** under the **Engagement Score V2** tab.

f. Once the above steps are completed, Click the **Post Install Steps** tab to open and click the **Run Batch** button (outlined in red) to update the Scorecard record and generate ES Scores and ES Scales for the contact record.

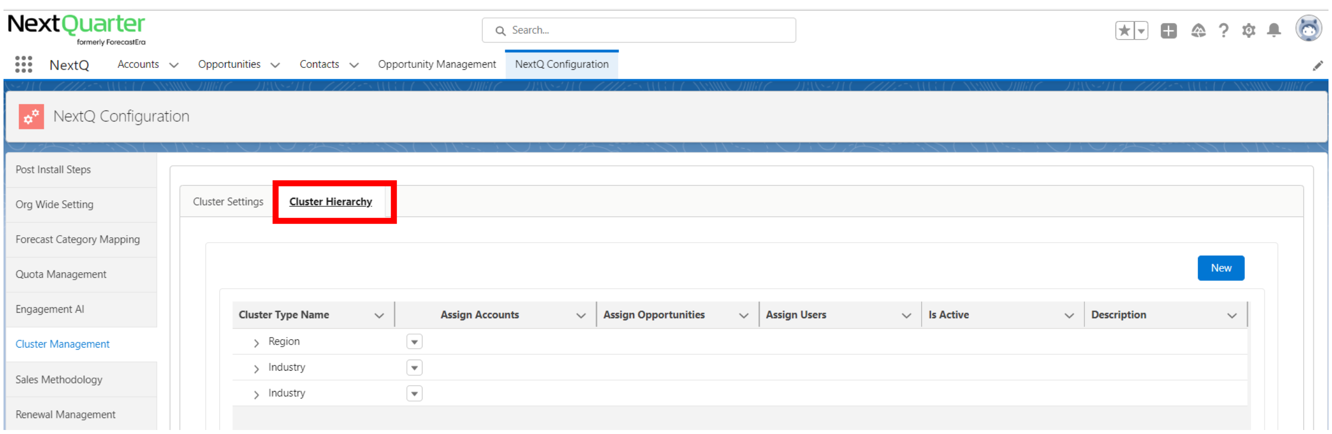


5.6. Cluster Management

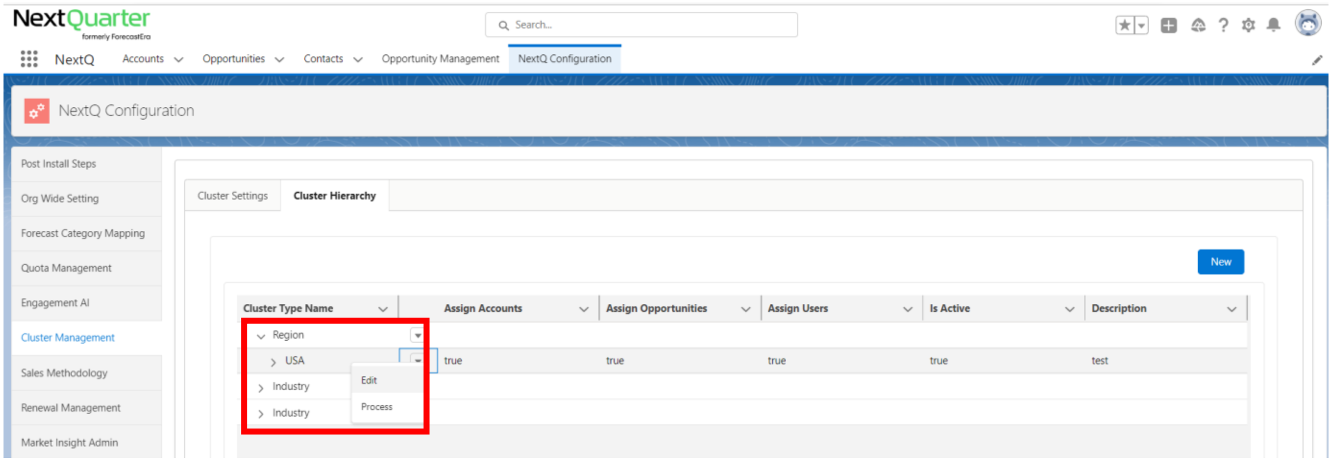
a. Navigate to the **Cluster Management** tab under the **NextQ Configuration** page.



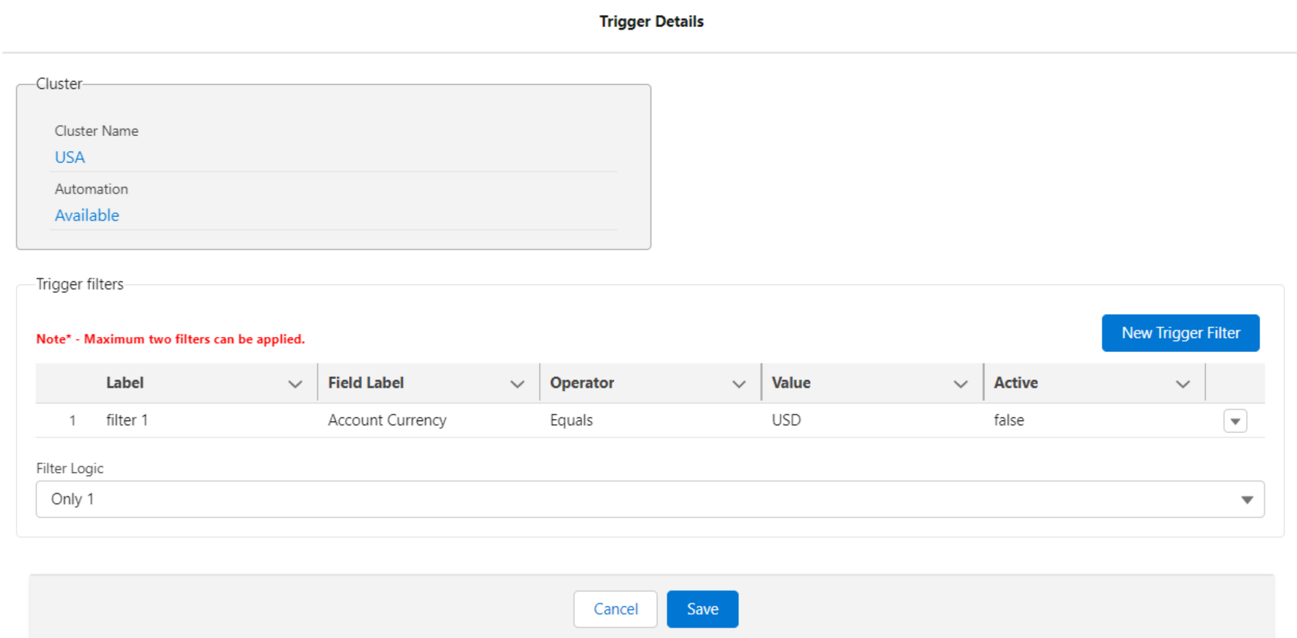
b. Under the **Cluster Settings** sub-tab, create a Cluster Type record.



c. Navigate to the **Cluster Hierarchy** sub-tab and create a Cluster record under the Cluster Type records.



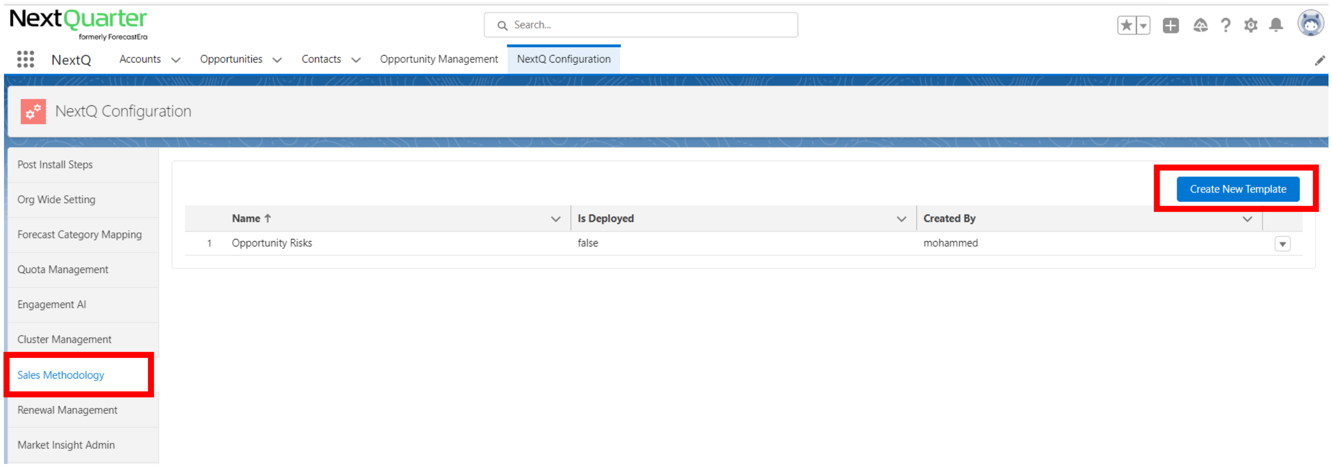
d. Once the Cluster records are created, open the carrot button beside the cluster and click the **Process** option.



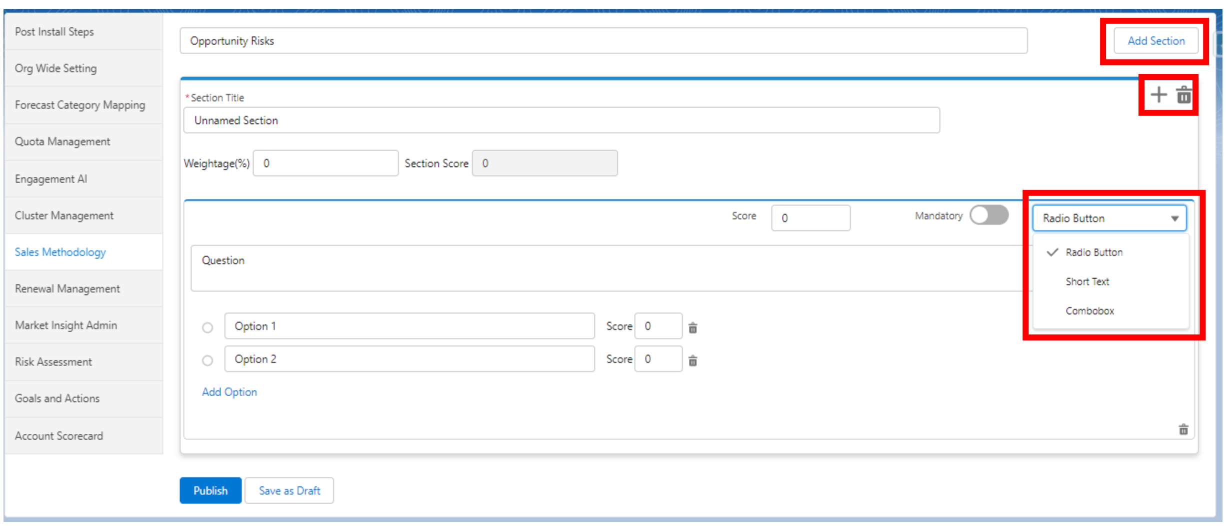
e. Create a **New Trigger Filter**, choose the Filter Logic, and click the **Save** button.

5.7. Sales Methodology

a. Navigate to the **Sales Methodology** tab under the **NextQ Configuration** page.



b. Click the **Create New Template** button to create a template for the sales methodology page for the opportunity.



c. Admin can add and delete sections by clicking the **Add Section** button (outlined in red) and **Delete** icon (outlined in red) on the template.

d. Admin can add the questions to each section by clicking the + icon (outlined in red) under **Section**, choosing the question type (outlined in red) for each question, and clicking **Publish**.

*Note –

1. The sum of all sections' weightage in the template should not exceed 100.

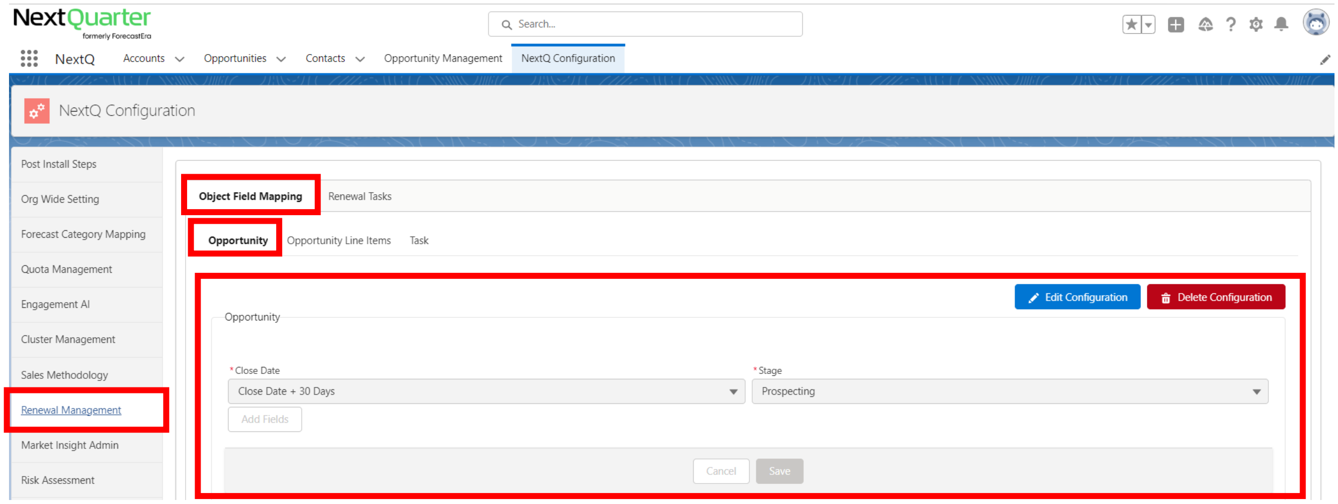
2. The sum of all questions in one section should not be more than 100.

3. Admin can create more than one Sales Methodology template.

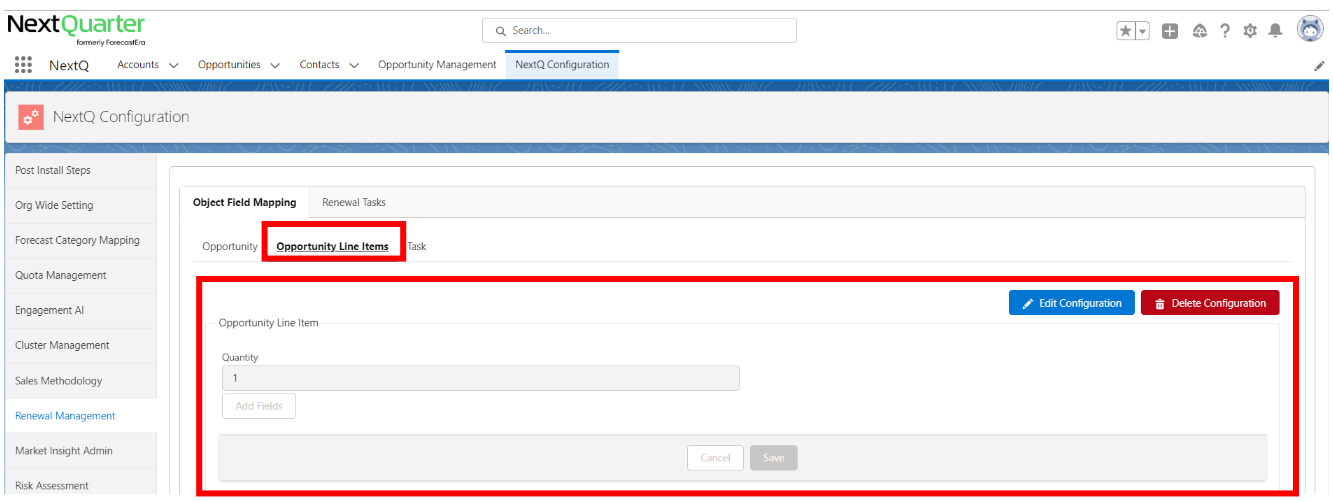
5.8. Renewal Management

a. Click the **Renewal Management** tab under the **NextQ Configuration** page.

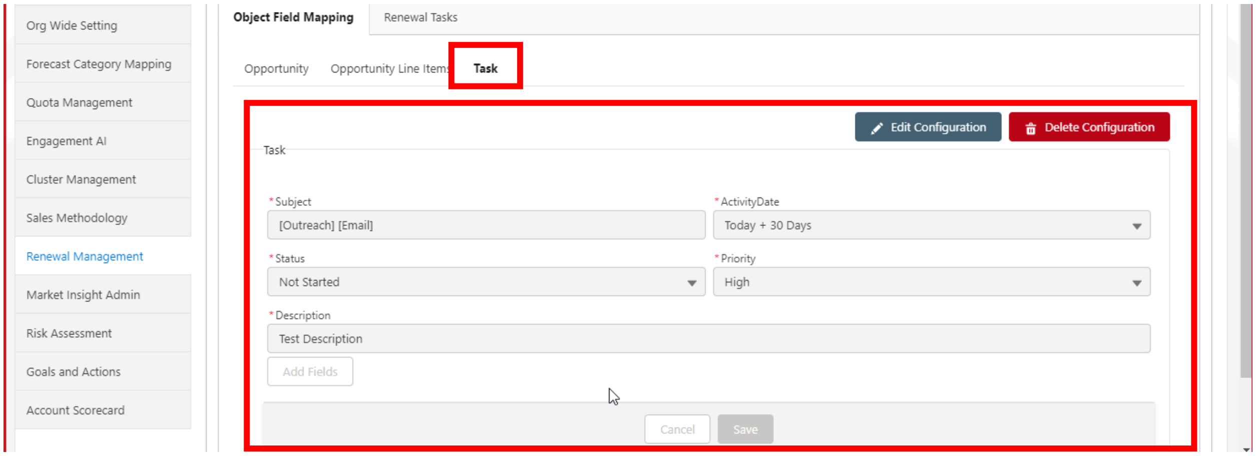
b. Admin needs to map the related Opportunity – To display the renewal opportunity on the account level.



c. Admin needs to map the related opportunity line items (Standard Product) - to display the renewal opportunity line Item on the account level.

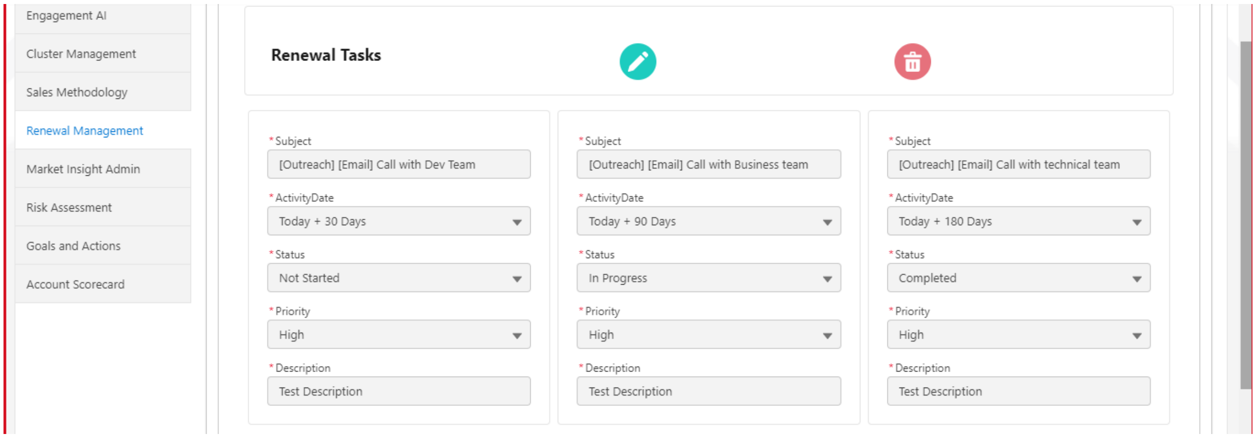


d. Admin needs to map the related task object – to display the data related to the selected fields.



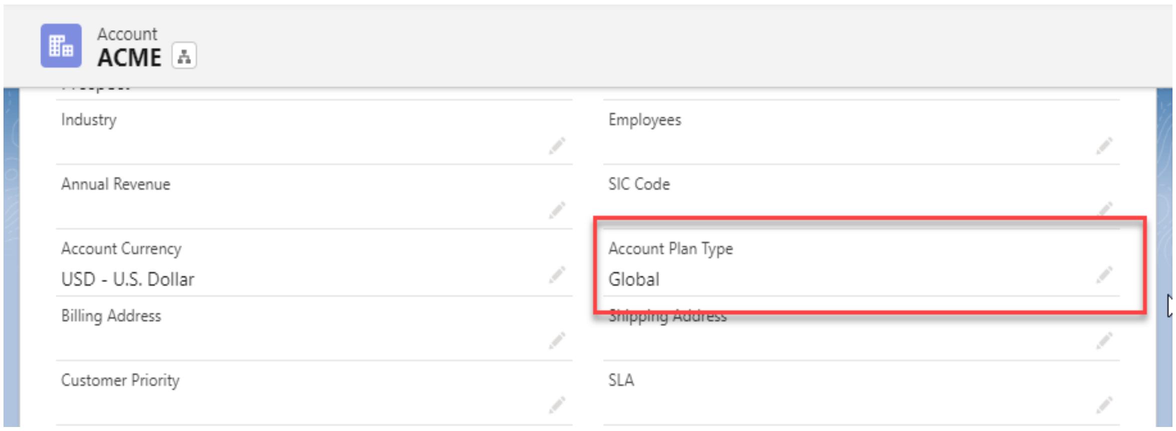
e. Renewal Tasks

I. Admin needs to create the task data – by default, task level defined data will be displayed when the user clicks the + button, and then the user can modify field values and save the renewal tasks records.



5.9. Market Insights Admin

Add the **Account Plan Type** field on the account layout to display data related to Market Insights.

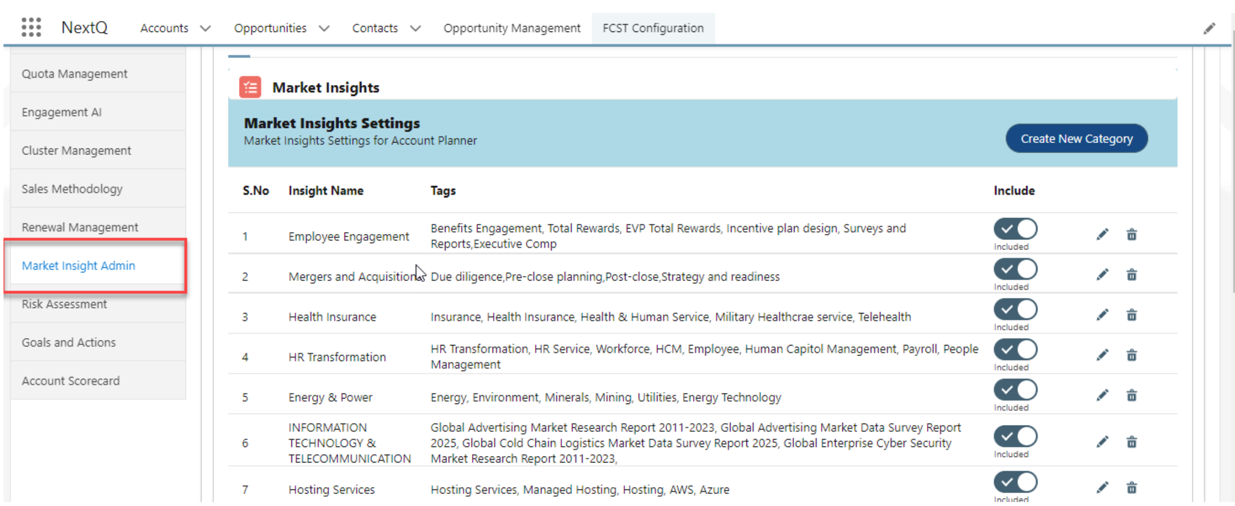


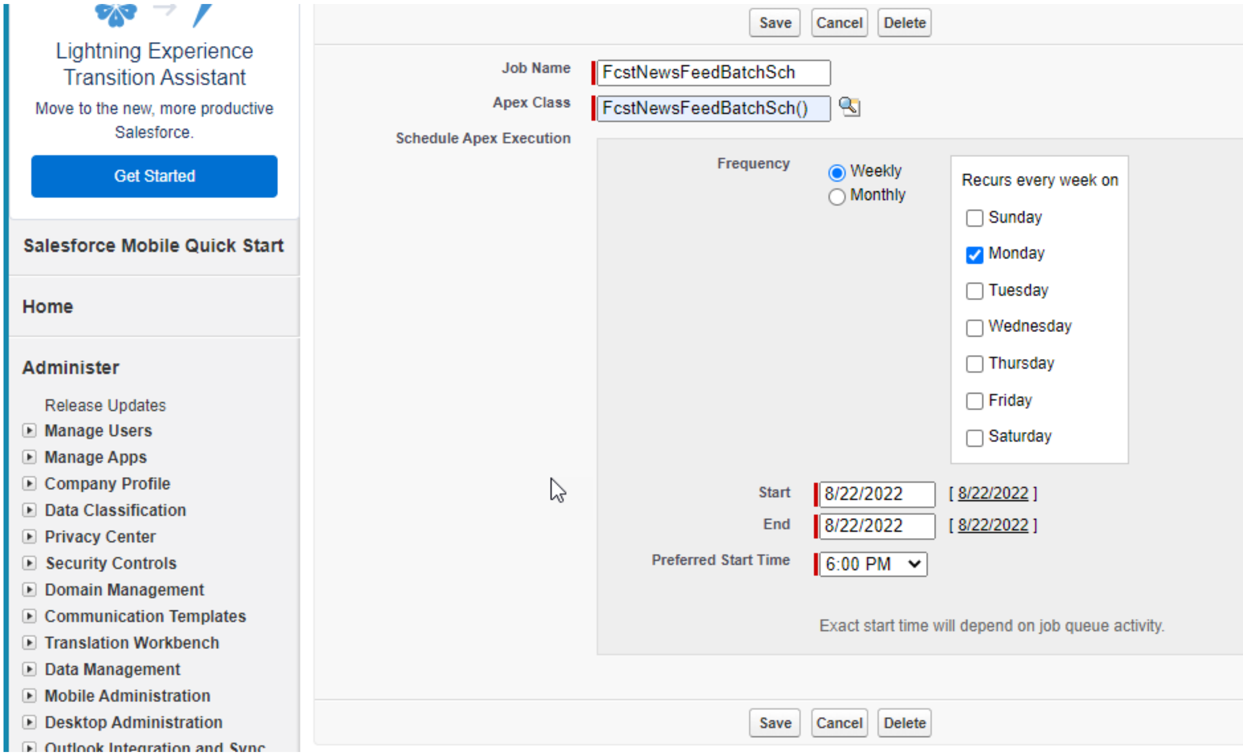
NextQ Configurations > **Market Insight** tab > Make sure to Include the record.

Only Included records data will display under **Account** in the **Market Insights** tab.

* Note - After including the data, the user needs to schedule the batch to see the news feed data on the account level.

Batch Name - FcstNewsFeedBatchSch()




Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Save
Cancel
Delete
Job Name
FcstNewsFeedBatchSch
Apex Class
FcstNewsFeedBatchSch()
Schedule Apex Execution
Frequency
Weekly
Monthly
Recurs every week on
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Start
8/22/2022
[8/22/2022]
End
8/22/2022
[8/22/2022]
Preferred Start Time
6:00 PM
Exact start time will depend on job queue activity.

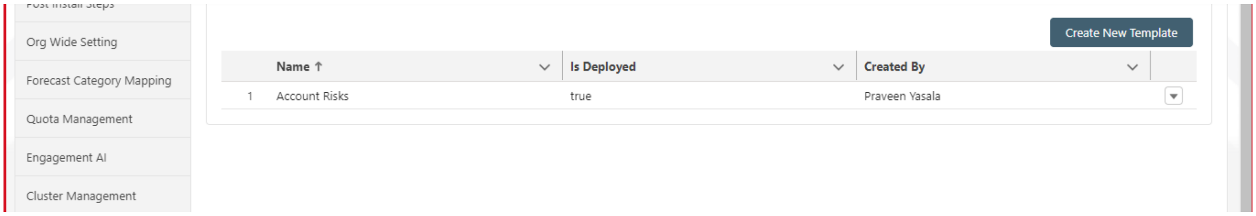
5.10. Risk Assessment

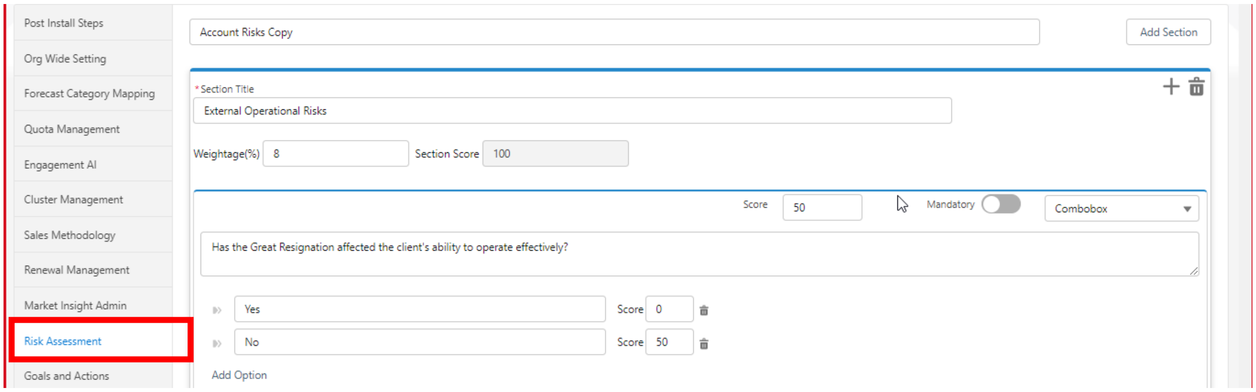
Admin needs to create the template for Risk Assessment on the account level.

*Note -

1. Combination of all sections' weightage in the template should not be more than 100.

2. Combination of all questions in one section should not be more than 100.

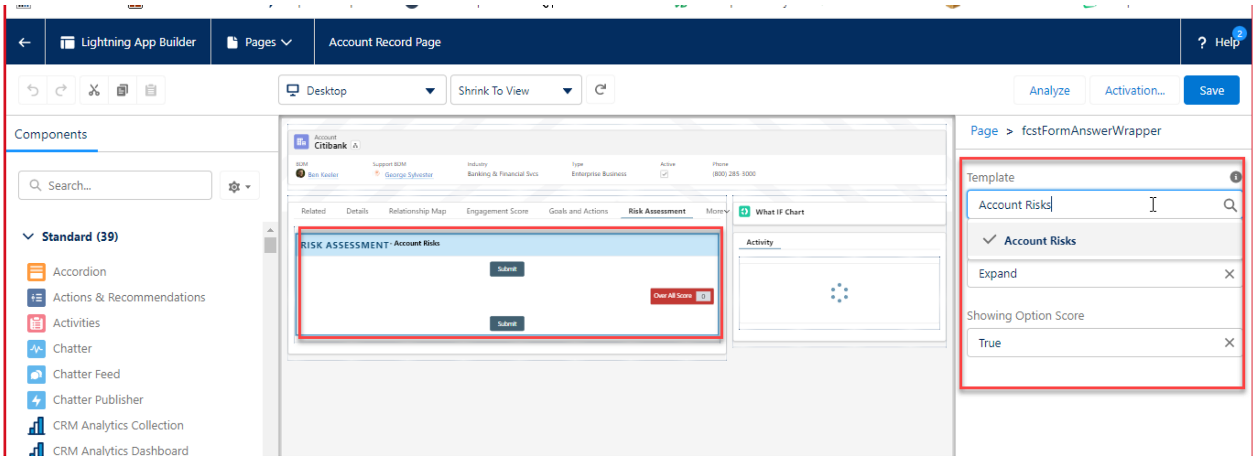




*Note - Admin can create more than one Risk Assessment template.

To display the New Risk Assessment Template:

a. Navigate to the gear icon.
b. Click **Edit Page**.
c. Click the **Risk Assessment** tab.
d. Click on the middle panel in the **Risk Assessment**.
e. Assign the new template to the right-side panel.
f. Click **Save**.

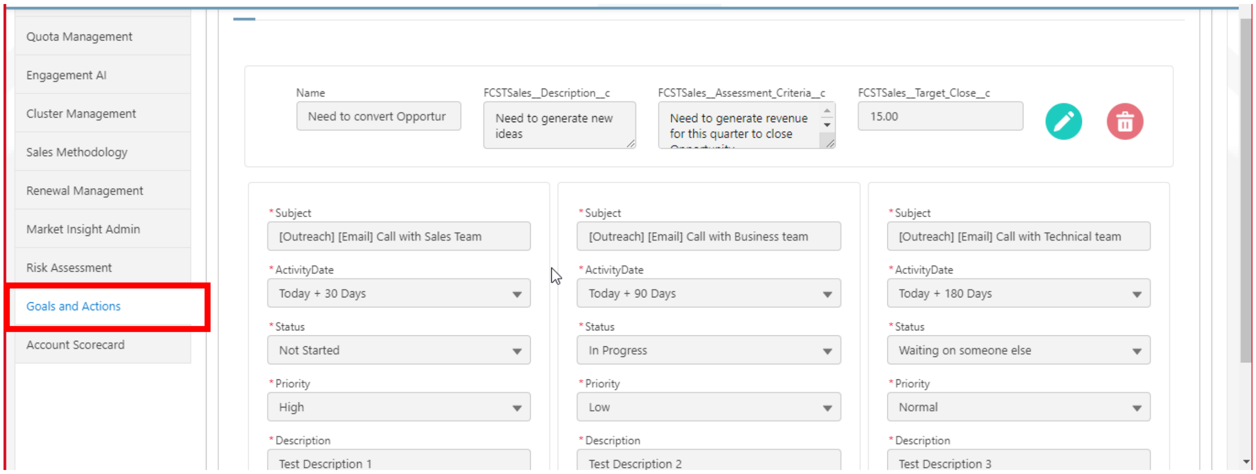


5.11. Goals and Actions

Note - The user should define data in the Renewal Management tab before creating data in Goals and Actions.

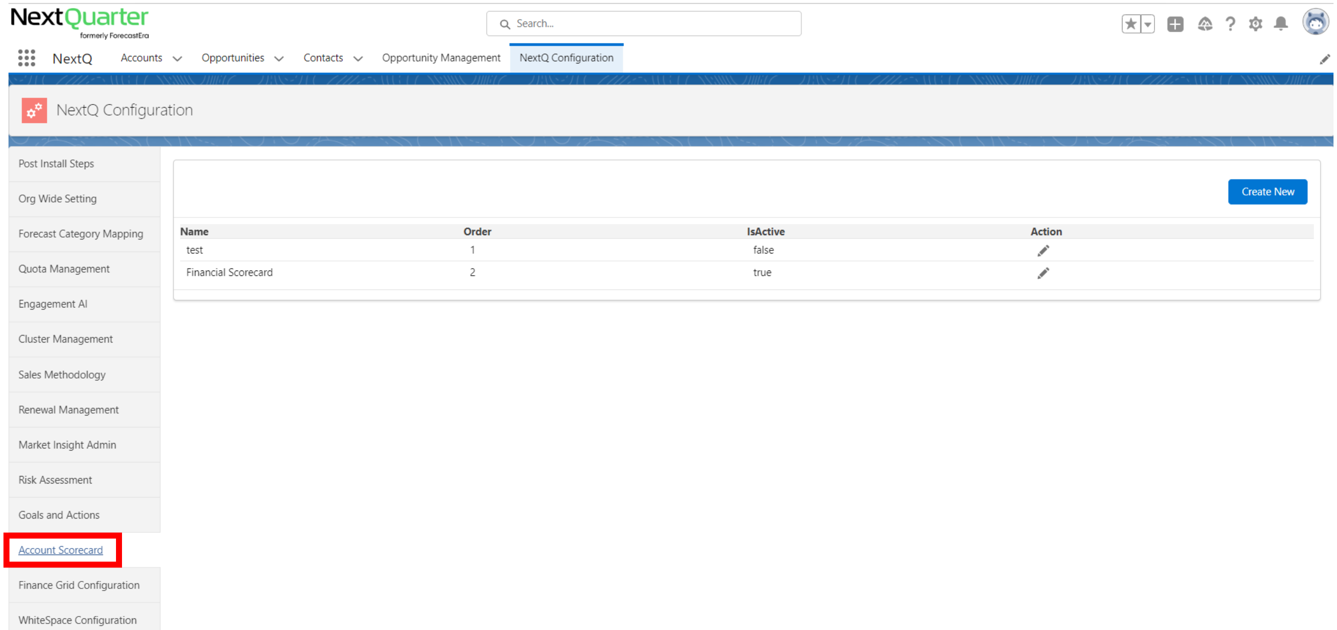
The user needs to create the data in **Goal & Tasks**.

Default task records data is displayed from **Renewal Management** > **Task** sub-tab.

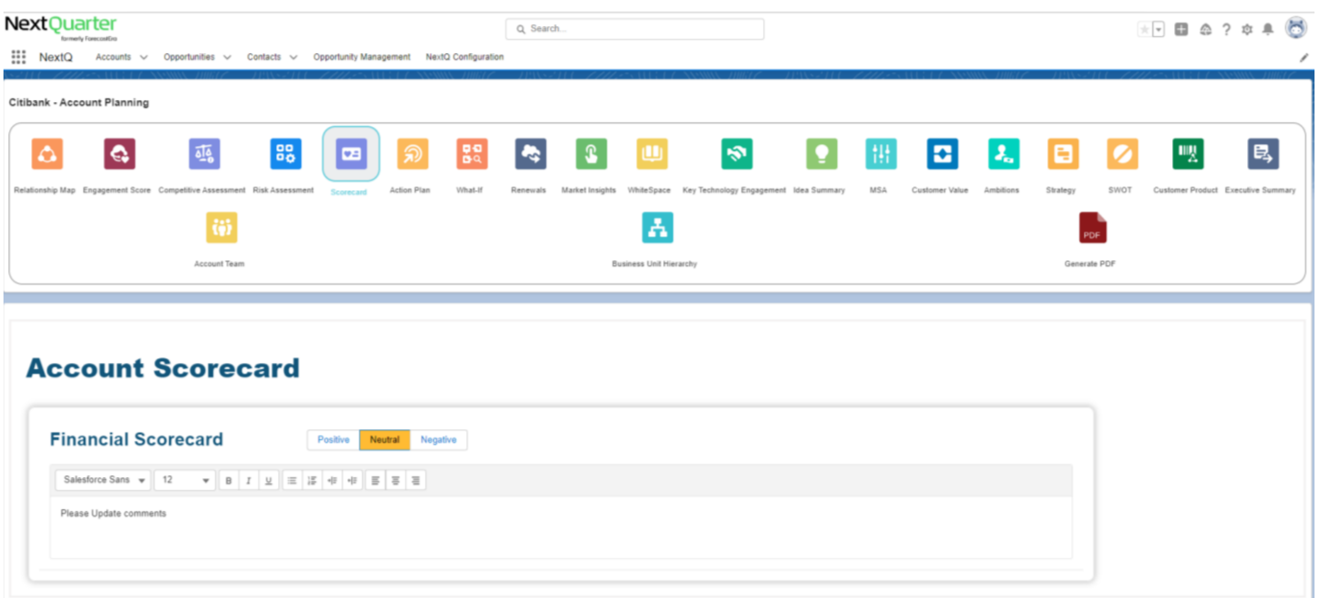


a. Admin needs to create the record to be displayed at the account level.

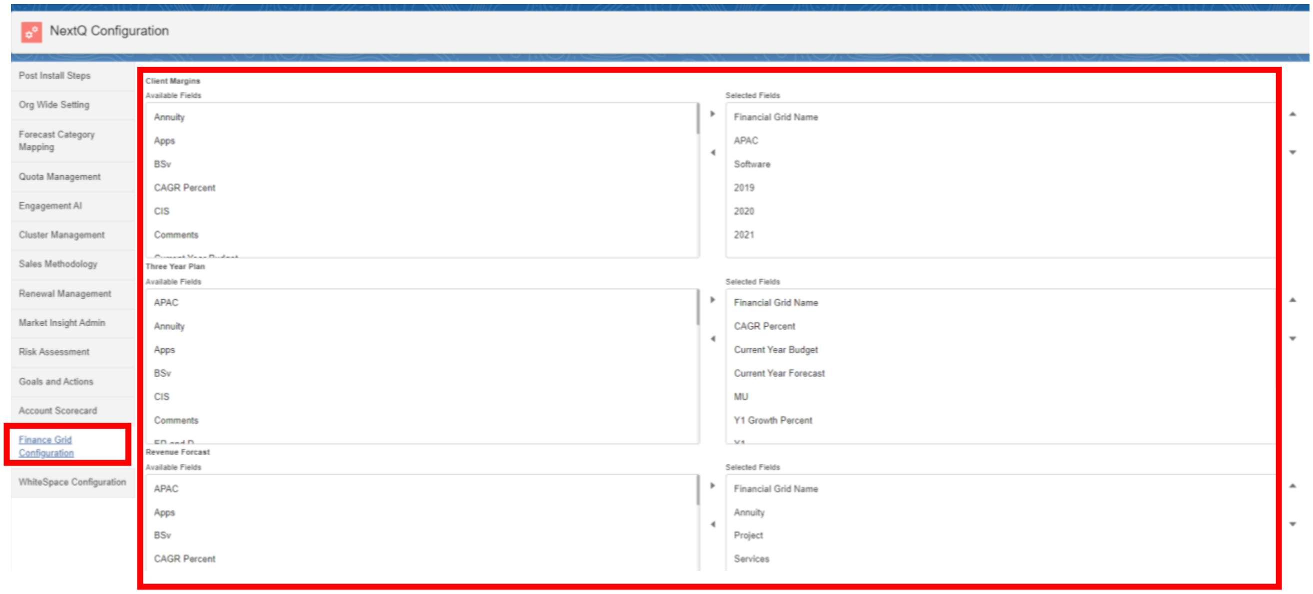
5.12. Account Scorecard



Account Level Scorecard



5.13. Finance Grid Configuration



Navigate to the Finance grid section (outlined in red) under NextQ Configuration.

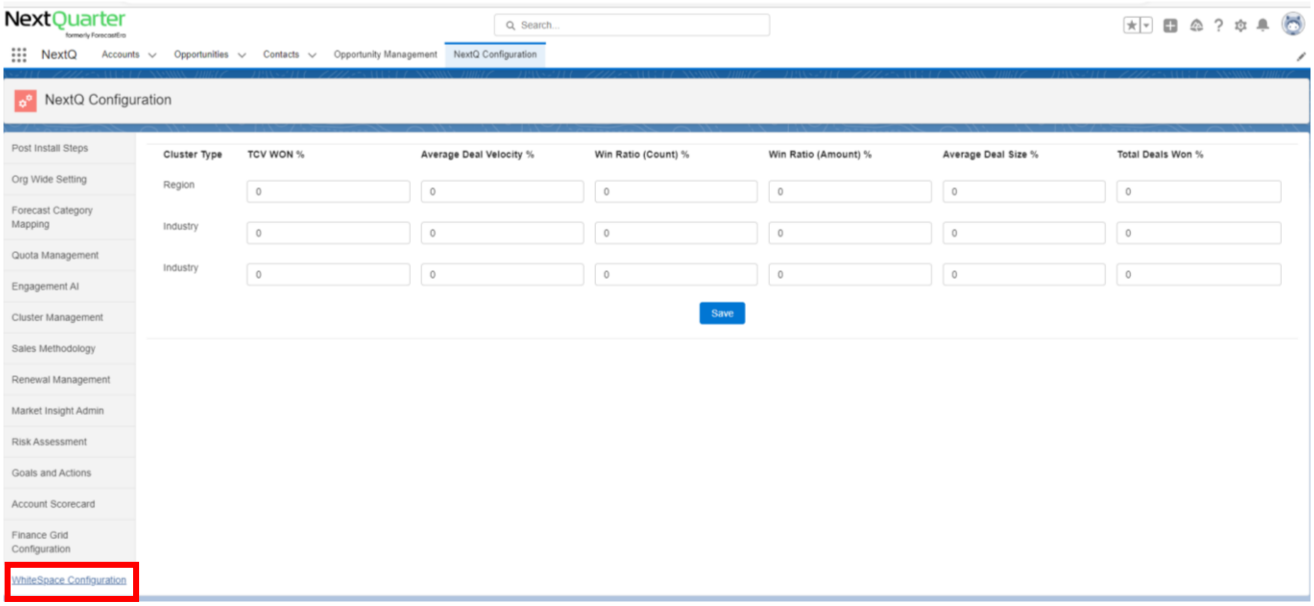
By default, all the fields will be selected for all the sections visible on the Finance Grid section (outlined in red).

Admin can include more fields or exclude existing fields from any section. These will be displayed for the specific finance type table on the application UI under the Finance grid tab.

More details on this will be available in the subsequent release.

5.14. WhiteSpace Configuration

The last section under NextQ Configuration is WhiteSpace Configuration (outlined in red).

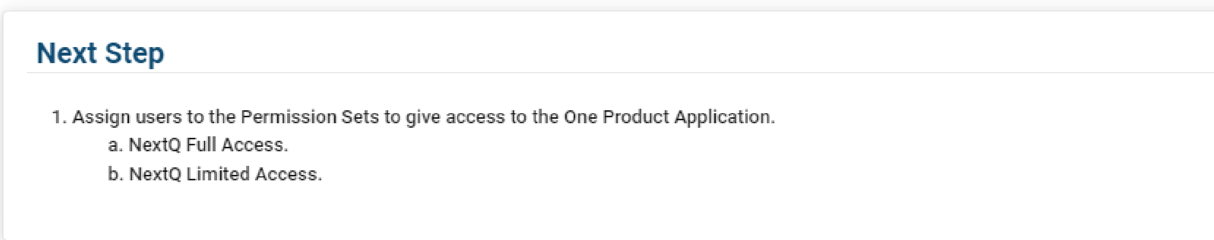


Here, the Admin can view the cluster type records created and can configure weightage of each KPI for the specific cluster type to help calculate the recommendation percentage for every product under Whitespace Tab on the application UI.

*Note – All the active Cluster types defined under the ***Cluster Management*** section will be displayed on this section.

6. Next Steps

a. Open the **Post Install Steps** tab on the **NextQ Configuration** page and follow the next steps mentioned in the section.



7. Standard Layout – Custom Fields

The admin must create records for all the fields listed in the table below to ensure that the application features work as desired.

Account	Parent Account
	Ultimate Parent
	Account Plan Type
	Industry
	YearStarted
	Annual Revenue
	Employees
	President & CEO
	Executive Sponsor
	ES Score Average
	ESScore
	ESHistoryCount
	Region
	Primary BU
	Key products
	Headquarters
Opportunity	Fcst Days to Close
	DAYS IN CURRENT STAGE
	FCST Opportunity Insight
	FCST Is Renewable
	FCST Days Before Renewal
	FCST Previous Renewal
	FCST Strategic Opportunity
	FCST RM Contact
	Forecast In
	Days to close
	Notes

	Rating
Contact	Title
	Department
	Reports To
	Budget Owner
	Relationship
	Influencer
	FCST RMScore
	FCST RM Scoring
	FCST Dont display in ForecastEra
	FCST Default Chart
	FCST Engagement Score
	ESScore
	ES Score
	FCST is Strategic Contact
	Facebook URL
	Linkedin URL
	Twitter URL
	Email
	Mobile

*Note – This step is critical for the application to work correctly.

ForecastEra is now Next Quarter.