

How to Install EasySchedule within Your Salesforce.com System – It's Easy!

1. Click on the Get It Now button on the AppExchange
2. The EasySchedule custom link will be downloaded into your system
3. Click on Setup – Customize – Opportunities – Page Layouts
4. Edit the Opportunity page layout or layouts you would like the EasySchedule custom link to be associated with
5. On the View dropdown on the right select “Opportunity Custom Links”
6. Drag and drop the “Update Close and Schedule Dates” custom link onto the Custom Links part of the page layout to the left
7. Save the page layout
8. Note: Schedules MUST be enabled within your Salesforce.com system for this to work. If not, you will receive an error message. To enable schedules, click on Setup – Customize – Products – Schedule Setup and then enable Quantity Scheduling or Revenue Scheduling or both.
9. It's now ready for use by your sales users
10. Contact support@modelmetrics.com with any questions or call 312-587-3037