



# SalesMethods

## Installation instructions

Version 3.2



# Contents

Quick Install.....	3
Install SalesMethods .....	3
Setup Wizard.....	4
Assign Licenses .....	4
SalesMethods is ready to use .....	4
Configuring SalesMethods .....	5
Open the SalesMethods Configuration page .....	5
Configure Common Features .....	5
Set the Product Feature Types.....	5
Add Product Families .....	5
Configure Plan2Close .....	6
Configure Plan2Prosper .....	6
Customising the methodology .....	7
Notes .....	8
Configuring Profiles and Permission Sets .....	9



# Quick Install

Thank you for choosing to evaluate or purchase SalesMethods. These instructions will guide you through the installation and configuration of the product.

Please follow the guide carefully and complete all instructions before trying to use the product.

If you have any problems then please contact SalesMethods support:  
[support@salesmethods.com](mailto:support@salesmethods.com).

## Install SalesMethods

1. Open the SalesMethods App Exchange web page:  
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000003JIKWEA0>
2. Click 'Get It Now'. You can install SalesMethods into a Sandbox, a Developer org, or a Production org.
  - a. You should always test with a Sandbox before installing into your Production org.
3. View and agree the Terms & Conditions, then click Install. On the next page click Continue.
4. On the 'Approve Package API Access' page, click Next.
5. On the 'Choose security level' page you should choose 'Select security settings' and then set Full Access to each sales profile that should be using SalesMethods. Click Next.
6. On the 'Install Package' page click Install. Salesforce will send you an e-mail when the package is ready to configure.



## Setup Wizard

SalesMethods comes with a setup wizard to guide you through the initial configuration process. You must follow these steps before you can use the applications.

1. From the Setup page click Installed Packages and then Configure next to SalesMethods.
2. Follow the on-screen prompts to set which applications you wish to use, to configure the user profiles, and to configure the page layouts.

## Assign Licenses

If you have installed a trial of SalesMethods or have purchased a limited number of licences you should now assign the licences to your users. Note. Do not be alarmed if the number of licences does not match the number you have purchased. SalesMethods have to manually configure your licence and this can only be done after you have installed your product.

1. From the Setup page click Installed Packages.
2. Click Manage Licenses and assign each licence to the required users.

## SalesMethods is ready to use

You should read the following section on configuring SalesMethods and you should also read the Administration on-line help which is available from any of the configuration pages.

Your sales users will now see the Plan2Close and Plan2Prosper components in their Opportunity and Account layouts. Users are encouraged to watch the on-line training videos at [P2P](#) and [P2C](#) to understand how to use the product.

Sales managers can contact SalesMethods to arrange for manager training and coaching aids.



# Configuring SalesMethods

## Open the SalesMethods Configuration page

1. From the Setup page click Installed Packages and then Configure next to SalesMethods.

## Configure Common Features

1. Click OrgChartPlus Team Members.
2. The OrgChartPlus tool holds information about the people in a sales team. These people can be drawn from the Salesforce Users list and also a
3. list of non-Salesforce users. You can choose where these users are stored; either as Contacts in a special Account or in the custom object 'Non-
4. SFDC Person'. You need to make this choice before adding any non-Salesforce users.
5. The default is to use the custom object. If you are happy with this then there is nothing to do here.
6. If you want to use a specific Account then select the Account and click the Set Account button.

## Set the Product Feature Types

SalesMethods includes a feature that allows products to be compared based on data gathered from specification sheets. You need to define each of the criteria by which the products can be compared. Please consult your account managers to find what feature types should be added.

## Add Product Families

Salesforce.com includes a facility to group your products by family (Product Family picklist). SalesMethods includes the same facility for your competitors' products. Use the Product Families page to add the competitor product families.



## Configure Plan2Close

If you have purchased Plan2Close you will need to configure the product.

1. Click Settings below Plan2Close.

If you have a policy that locks Opportunities after being closed you can extend this policy by;

2. Selecting 'Lock Plan2Close after Opportunity close'. This will prevent changes to any Plan2Close data after the opportunity has been closed. It will also remove any New, Edit, or Delete links and buttons.

You can choose to customise the Plan2Close help. You would most likely do this to provide guidance to sales staff that is unique to your organisation. This is normally done in cooperation with SalesMethods consulting advisors.

3. Click Save after making any changes.

## Configure Plan2Prosper

If you have purchased Plan2Prosper you will need to configure the product.

1. Click Settings below Plan2Prosper.

You can choose to customise the Plan2Prosper help. You would most likely do this to provide guidance to sales staff that is unique to your organisation. This is normally done in cooperation with SalesMethods consulting advisors.

2. Click Save after making any changes.



## Customising the methodology

SalesMethods comes with a standard methodology for use in Plan2Close and Plan2Prosper. This comprises the 16 Questions (in a 4x4 grid) and the guide sheets. You can adjust or replace the methodology questions for some or all of your users. In a typical configuration you would have a different methodology for each sales process. Each configuration in SalesMethods is called a Question Set. Use the Custom Question Set configuration to:

- Create one or more groups of questions for Plan2Close and/or Plan2Prosper so as to supply your own methodology.
- Edit, add or remove questions.
- Change the grouping of questions.
- Replace the default guide sheets with your own.
- Enable or disable tools.
- Enable the risk assessment feature of Plan2Close.

Before creating your own question sets you might want to talk to your SalesMethods account manager who can help you define and configure your questions. If you change the meaning or number of questions then you will need to replace the standard guide sheets. Please contact SalesMethods support who can provide you with a template.



# Notes

SalesMethods contains two separate products, Plan2Close and Plan2Prosper. These may be used by different groups of users. You can lock down the product so that each application can only be accessed by a group of users. Please contact SalesMethods support for help.

You may notice that the objects, pages, and classes contained within SalesMethods have a two or three character prefix. These define the section of the product that the components belong to:

Prefix	Product	Meaning
ADP	Plan2Prosper	Account Development Planning was the original product name.
MSO	Plan2Close	Managing Sales Opportunities was the original product name.
SM	SalesMethods	Components that are common to all products.

A number of objects contained in the SalesMethods package begin with the word obsolete. These objects were used in an earlier version of the product and can now be ignored.



# Configuring Profiles and Permission Sets

Over time you may want to extend access to SalesMethods to new user groups. This can be achieved with profile permissions or permission sets.

1. You should ensure that standard user profiles can access the Competitors tab but not the SalesMethods Config tab. This is for administrators
2. only.
3. You also need to ensure that API Enabled is checked for all users.
4. Under Custom Object Permissions ensure the permissions are as follows.

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
ADP BlueSpace	✓	✓	✓	✓	MSO Offering Items	✓	✓	✓	✓
ADP BlueSpace Competitor	✓	✓	✓	✓	MSO Offering Ratings	✓	✓	✓	✓
ADP BlueSpace Data	✓	✓	✓	✓	MSO OrgCharts	✓	✓	✓	✓
ADP BlueSpace Regions	✓	✓	✓	✓	MSO OrgChart Entities	✓	✓	✓	✓
ADP BlueSpace Unit	✓	✓	✓	✓	MSO OrgChart Entity Common	✓	✓	✓	✓
ADP CompetingForces	✓	✓	✓	✓	MSO OrgChart Relationships	✓	✓	✓	✓
ADP CompetingForces Statements	✓	✓	✓	✓	MSO OrgChart TeamMembers	✓	✓	✓	✓
ADP CompetingForces Threat	✓	✓	✓	✓	MSO Questions	✓	✓	✓	✓
ADP Objectives	✓	✓	✓	✓	MSO ValueMill	✓	✓	✓	✓
ADP OrgCharts	✓	✓	✓	✓	MSO VMStatements	✓	✓	✓	✓
ADP OrgChart Entities	✓	✓	✓	✓	Non-SFDC People	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADP OrgChart Entity Common	✓	✓	✓	✓	obsolete MSO OrgCharts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADP OrgChart Relationships	✓	✓	✓	✓	obsolete MSO OrgChart Entities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADP OrgChart TeamMembers	✓	✓	✓	✓	obsolete MSO OrgChart Intimacies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADP Questions	✓	✓	✓	✓	obsolete MSO OrgChart NonSFEntities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADP SWOT Statements	✓	✓	✓	✓	obsolete MSO OrgChart NonSFUsers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Units	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	obsolete MSO OrgChart Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Unit Groups	✓	✓	✓	✓	obsolete MSO OrgChart TeamMembers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Accounts	✓	✓	✓	✓	Product Families	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competitors	✓	✓	✓	✓	Product Features	✓	✓	✓	✓
Competitor Families	✓	✓	✓	✓	Product Feature Types	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competitor Products	✓	✓	✓	✓	Question Sets	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Intimacies	✓	✓	✓	✓	Question Set Groups	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MSO Buying Criteria	✓	✓	✓	✓	Question Set Questions	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MSO Objectives	✓	✓	✓	✓	Sales Regions	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MSO Offerings	✓	✓	✓	✓	Sales Region Groupings	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Note. If you wish to grant different permissions to various groups then contact SalesMethods support who can provide you with the permissions to fit your needs.



1. Save the profile and on the profile view page.
2. Edit the Enabled Visualforce Page Access.
3. Remove access to the following configuration pages:

ADPSettings  
MSOOrgChartUpgrade  
MSOSettings  
SMBusinessUnitSettings  
SMConfig  
SMFeatureTypeList  
SMProductFamilies  
SMProductFeatureNew  
SMProductFeatureView  
SMQuestionSetConfig  
SMQuestionSetEdit  
SMQuestionSetEditAutoMatch  
SMQuestionSetEditDetail  
SMQuestionSetEditGrid  
SMQuestionSetEditTools  
SMRegionAdd  
SMRegionCreationScripts  
SMRegionSettings  
SMSuperRegionAdd  
SMTeamMemberList

If you have multiple sales profiles then you will need to perform these changes for each profile.



## Thank you for reading

For any questions or further support on using SalesMethods apps, please contact [support@salesmethods.com](mailto:support@salesmethods.com).

