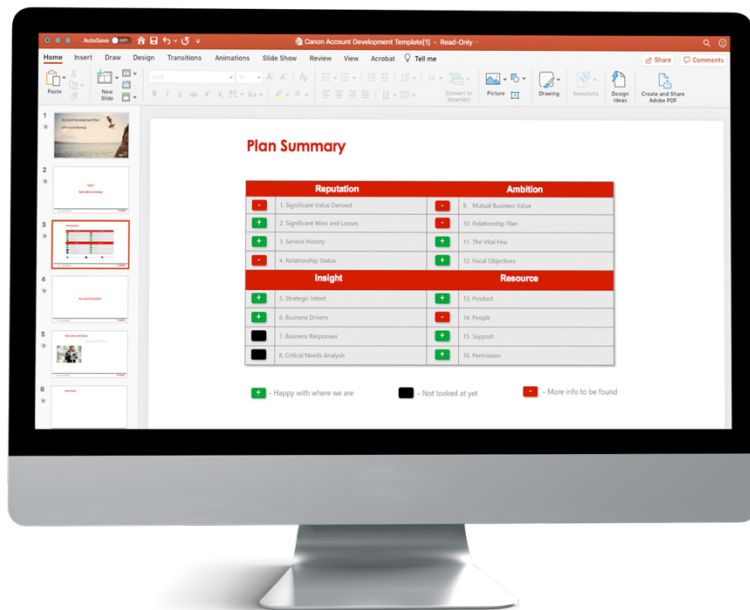




ShowMe

User Guide v1.5+



Contents

ShowMe overview	3
Installing ShowMe.....	4
System Requirements	4
Salesforce.....	4
SalesMethods	4
Installation	4
Adding ShowMe to page layouts.....	5
Template document creation	6
Overview of ShowMe document creation process	6
Understanding the ShowMe “Command Fields”	6
Command Fields Conventions.....	6
Example ShowMe Export commands	6
Special Commands.....	7
WHERE Command: For querying objects based on certain criteria	7
FOR/END FOR Command Set: For tables in template documents	7
Using criteria within WHERE and FOR/END FOR commands	8
P2STATUS Command: For use with Plan2Close or Plan2Prosper apps.....	9
Your PowerPoint templates	10
Incorporating command fields into your templates	10
Template fonts and formats – It’s All Yours!	11
Document activation in Salesforce	12
Account Teams/Sales Reps use of ShowMe	13



ShowMe overview

With SalesMethods ShowMe, you can automatically create Microsoft® PowerPoint presentations with descriptive and status information exported directly from your Salesforce system.

THE VALUE OF SHOWME

ShowMe will enable your Account and Sales Teams to:

- Respond within a matter of minutes versus hours or days to leadership requests for Account or Opportunity information.
- Spend Significantly more time with Clients and prospects as it reduces the administrative burden of manually typing information into internal Account Planning or Deal Review presentations.
- Draw information already stored in Salesforce directly into your sales slides.
- Easily prepare client facing documents such as proposals, quotes, order forms, and presentation decks

ShowMe connects your Salesforce-stored information with your document templates in the following manner:

- From an Account or Opportunity record your document template is obtained from a Salesforce static resource and brought into the user's browser.
- It examines the presentation, searching for commands incorporated into the template.
- ShowMe then queries Salesforce to extract the required object field information.
- The ShowMe export commands are replaced with the information from Salesforce.
- The template is updated, converted into a consumable presentation format, and saved to the user's computer.



Installing ShowMe

System Requirements

Salesforce

- A Salesforce edition with API access, or Salesforce Professional.
- Be assigned the Salesforce system administrator profile.
- Have all of the following user profile administrative permissions:
 - API Enabled.
 - View Setup and Configuration enabled.
 - Modify All Data on any objects (accounts, contacts, or opportunities).

SalesMethods

Must have SalesMethods Plan2Close or Plan2Prosper apps installed via the SalesMethods package.

Installation

- Log into your Salesforce org.
- Find ShowMe on the Salesforce AppExchange here: [ShowMe](#)
- You will be redirected to Salesforce to install the ShowMe package. Select **Install for All Users**, then click Install.
- In the dialog box, select Yes, grant access to All Users, then click Continue.
- Salesforce will then install the ShowMe package. This installation should only take a few minutes.
- You may see a message: This app is taking a long time to install. You will receive an email after the installation has completed.
- Click Done.
- When the installation is successful, you should receive an email confirmation from Salesforce with the subject 'Package ShowMe Integration Install Successful'.



Adding ShowMe to page layouts

Add the **Export** button to the Account and Opportunity Page Layouts in Salesforce.

1. Navigate to either the Account or Opportunity Page Layouts.
2. Select edit for the targeted page layout.
3. Depending on if you are using Salesforce Classic or Lightning, perform the following:
 - a. Classic: In Buttons, find the "Export" button. Click and drag the "Export" button down into *Quick Actions in the Salesforce Classic Publisher section*.
 - b. Lightning: In Mobile & Lightning Accounts, find the "Export" button. Click and drag the "Export" button down into *Salesforce Mobile and Lightning Experience Actions Section*.
4. Click Save.
5. Repeat these steps for either the Account or Opportunity page layout.

Users will now see the ShowMe export button wherever you placed it on their Account or Opportunity record pages.



Template document creation

Overview of ShowMe document creation process

To setup ShowMe, you must create a master document, upload it into your Salesforce org, and then make it available for your users. The following steps describe how.

Understanding the ShowMe “Command Fields”

Command Fields Conventions

You will use Command Fields within your PowerPoint PPTX template to designate those Salesforce Objects and Fields you want to incorporate into the template via the ShowMe automation. In general, the fields will come from either the Account or Opportunity objects, objects related to Accounts or Opportunities, or any relevant SalesMethods objects.

The convention for Command Fields is a combination of the target Salesforce Object AND Field with the convention of **Object.Field**, surrounded by two curly brackets on either end: “{{” and “}}”

If you are familiar with Salesforce email merge fields with the single curly brackets around them, these double curly brackets function in a similar manner and are critical for ShowMe to function properly.

Example ShowMe Export commands

To insert text or values from a Salesforce field: {{Object.Field}}

- For Account name: {{Account.Name}}
- For Account Owner: {{Account.Owner.Name}}

To Insert a field value from an object selected based on certain criteria:

- To pull the evidence recorded by a sales rep in response to Plan2Prosper’s question set number 9:

```
{{Account.SalesMethods__ADP_Questions__r(SalesMethods__Number__c=9).SalesMethods__Evidence__c}}
```



Special Commands

WHERE Command: For querying objects based on certain criteria

As shown in Example 2 above, you have the option to pull information into your template from Salesforce based on criteria you specify. We call this the WHERE Command. (You do not actually use the word WHERE in the Command Field, the ShowMe application performs the necessary translation to make the process easier for you.) The ShowMe functionality operates very similar to Salesforce Process Builder execution criteria or Validation Rule error conditions, where you can develop criteria based on an Object's fields and various operators.

Simply reference the Target Object, its Related Object, the Field being referenced as criteria and the criteria condition or required value, followed by the Field containing the target information. The criteria field and condition need to be surrounded by round brackets. **{{Object.Related Object.(Field x=n).Field}}**

FOR/END FOR Command Set: For tables in template documents

Another Command Set is used when you want to use tables within your template and automatically fill in the table across multiple columns and rows of Salesforce values – think a list of sales Opportunities with current Stage, Close Date, and Amount (\$). In these instances, you need to designate the start and end points of the table using **{{FOR}}** (defining the beginning of the table) and **{{END FOR}}** (defining the end of the table). This Command Set runs a loop through multiple fields in an Object, yielding each field's value, and doing so row by row until it reaches the end of the Object's rows – effectively creating a list similar to Salesforce's List Views on Objects.

Here is an example of an opportunities table with the FOR/END FOR Command Set:

Name	Stage	Amount	Close Date
{{FOR}}			
Account.Opportunities AS Opty}} {{Opty.Name}}	{{Opty.StageName}}	{{Opty.Amount}}	{{Opty.CloseDate}} {{END FOR}}



Using criteria within WHERE and FOR/END FOR commands

ShowMe can accommodate conditions within Commands to obtain certain records based on specific criteria. Like Salesforce workflow execution criteria, these conditions can incorporate formula as well and can leverage boolean operators and functions. The conditions focus only on Account or Opportunity records. Below is an example of obtaining multiple opportunities from an Account based on opportunity stages within a FOR/END FOR command in a table.

Name	Stage	Amount	Close Date
<pre>{{FOR Account.Opportunities(StageName='2. Demand Generation' OR StageName='3. Qualifying' OR StageName='4. Proposing' OR StageName='5. Negotiating') AS Opty}} {{Opty.Name}}</pre>			
	{{Opty.StageName}}	{{Opty.Amount}}	{{Opty.CloseDate}} {{END FOR}}

Though in general most Boolean operators and functions are available for use within the ShowMe app, there are some limitations as listed in the table below. Please refer to the following Salesforce help document for more information on Formula and Operators: [Salesforce Formula Operators and Functions](#).

ShowMe supports the following Objects rules:		Supported data types include:		Supported functions include:		
Account	\$Profile	Numeric	Picklist	AND	CONTAINS	TEXT
Opportunity	\$User	Checkbox	Multipicklist	OR	IF	ISBLANK
\$RecordType	\$UserRole	Text		TRUE	INCLUDES	ISNULL
				FALSE	ISPICKVAL	NOT
				NULL	CASE	



P2STATUS Command: For use with Plan2Close or Plan2Prosper apps

Plan2Close or Plan2Prosper apps contain colour coded indicators representing the current positive, neutral, or negative status of a given question. ShowMe enables the ability to bring that same status colour coding into your template documents. This is accomplished using the P2STATUS command, a special function that obtains the P2 status value and translates it to the appropriate colour in a template.

Unlike other commands that may be placed anywhere throughout a template, this special function is placed in a different location. Additionally, this function is specifically applied to a shape within the template.

The following is the command convention:

{{ P2STATUS(SalesMethods Object.SalesMethods__StatusValue__c)}}

Note that the entire Object/Field reference must be flanked with parentheses.

Perform the following steps to use the special function within your template:

- Insert a shape, such as a square, into your template.
- Click on the shape and find the **Alt Text** function contained in the Microsoft menu option.
- Enter the P2STATUS command in the Alt Text box.

Now, when exporting information from Salesforce via ShowMe, that shape will be the same colour as the Status field in your Plan2Close or Plan2Prosper app in Salesforce.



Your PowerPoint templates

Incorporating command fields into your templates

Using the Command Fields conventions noted above, you can place the fields anywhere you would prefer within your template. Our recommended process to prepare a ShowMe template document is as follows:

1. Obtain an existing presentation that your team already utilizes, such as an Account Management Plan or Deal Review deck, or create one.
2. In those areas where your teams would normally manually type information into the template, think about the Salesforce Objects and Fields that would be used to automatically fill in the information with ShowMe instead.
3. Using Excel, develop a list of the Salesforce Objects and Fields that will be used.
4. In Salesforce, go to Object Manager for either the Account or Opportunity objects, then go to Fields & Relationships. Here, you will find each field and note their Field Names.
5. Back in the Excel file, in a column next to the target Objects / Fields you documented, record the corresponding Salesforce Field Name.
6. For standard Salesforce Fields, you will refer to the Field Name
7. For custom Salesforce Fields you need to record and utilize the API Name
8. In the Excel file, create a third column and using an Excel formula, concatenate the fields based on the Command Field conventions shared in the prior section of this document. Be sure to include the curly brackets "{ }" and round brackets "()" for the where applicable.
9. Copy / paste the command fields from the Excel file into your template documents.



Template fonts and formats – It's All Yours!

A key advantage of ShowMe is that it works within YOUR template. ShowMe does not require limiting the overall look, feel, and formatting of your document – you can use all MS functions within your template without impacting ShowMe's function. From font size and colours to using shapes and backgrounds, ShowMe can work within your desired template structure.

In fact, the Command Fields can also be formatted however you want as well such that when the Salesforce information is incorporated into the template it will reflect the formatting you set for the field. So, be as creative as you want with your templates; ShowMe can adapt.



Document activation in Salesforce

Once you have prepared your template document with the ShowMe commands discussed in prior sections, you perform the following steps to make the document available for use on Accounts and Opportunities for your Salesforce users. All of the following steps are performed in your Salesforce org.

1. Upload one or more PowerPoint template file as static resources into your Salesforce instance. **Be sure to note the resource names.** (More info here: [Managing Static Resources](#))
2. Find the “ShowMe Templates” App in Salesforce Apps
3. Once in the “ShowMe Templates” App, click “New” and fill in the fields as follows:
 - a. Enter the **Template Label**. This is the label that will be displayed to end users. keep in mind that you may have multiple templates available to your users so be sure to label your templates in a manner that distinguishes one versus another.
 - b. Enter the **Resource Name**. This will be the name of the template when you added it to the static resources.
 - c. Enter **Question Set** (optional). If the template is for a particular Question Set (from either the SalesMethods Plan2Close or Plan2Prosper Apps), select the Question Set. If the template is for Accounts or Opportunities without Question Sets, it is OK to leave this field blank.
 - d. Enter **Related Object**. Specify whether the templated will be used on Accounts or Opportunities.
 - e. **Enabled** Check Box. Check this box to make the template available to your users. If this box is unchecked, users will not be able to use the template.
 - f. Enter **Rule** (optional). You can enter a rule that will be evaluated based on the Account or Opportunity values. Use this to make templates for use only in certain circumstances (account value, opportunity stage, etc.)
 - g. Click Save.
4. If you are supporting translations, click “Add translation”:
 - a. Enter the translated template label.
 - b. Enter the language such as “en” or “fr”.
 - c. If the template has been translated, enter the template static resource name.
5. Test the ShowMe function of your template document via an Account and Opportunity.



Account Teams/Sales Reps use of ShowMe

For account teams and sales reps to automatically populate documents using ShowMe, they perform the following simple steps:

- Go to the Account or Opportunity record containing the information you want to incorporate into a template.
- Find and Click the Export button.
- On the next screen, you will see a dropdown box called Available Templates. Click that dropdown box to select the desired template.
- Once you have selected desired template, click the Export Presentation button. (A message will appear stating the show me export app is preparing the presentation).
- The final file will appear at the bottom of your window and is available to open or save.

Your file, prepared by SalesMethods ShowMe,
is now ready for your review and/or sharing with other people.



Thank you for reading

For any questions or further support on using ShowMe, please contact support@salesmethods.com.

