Installing and Setting Up Strategy Mapper

Table of Contents

Introduction

This guide will step you through the installation and setup of Strategy Mapper. Once you have completed the installation, Strategy Mapper can be configured for your organization utilizing the Strategy Mapper Planning Guide. The following will be detailed in this document:

- Installing Strategy Mapper
- Setting Up Strategy Mapper
    o Account
    o Opportunity
    o Lead
- Enabling Picklist Values
- Configuring Account Mapper Template Page Layout
- Configuring Opportunity Mapper Template Page Layout
- Configuring Meeting Mapper Template Page Layout
- Modify User Object to support quotas.
- Creating Main Influencing Factors (MIF)
- Modifying Account and Opportunity Status dropdowns

This guide was created using the Salesforce Lightning interface. Everything completed in this document can be done in Salesforce Classic.

Installing Strategy Mapper from Salesforce AppExchange

Preinstallation Setup

Strategy Mapper requires Contacts to Multiple Accounts is enabled, this feature is used in the Organizational Map.

Enable Contacts to Multiple Accounts

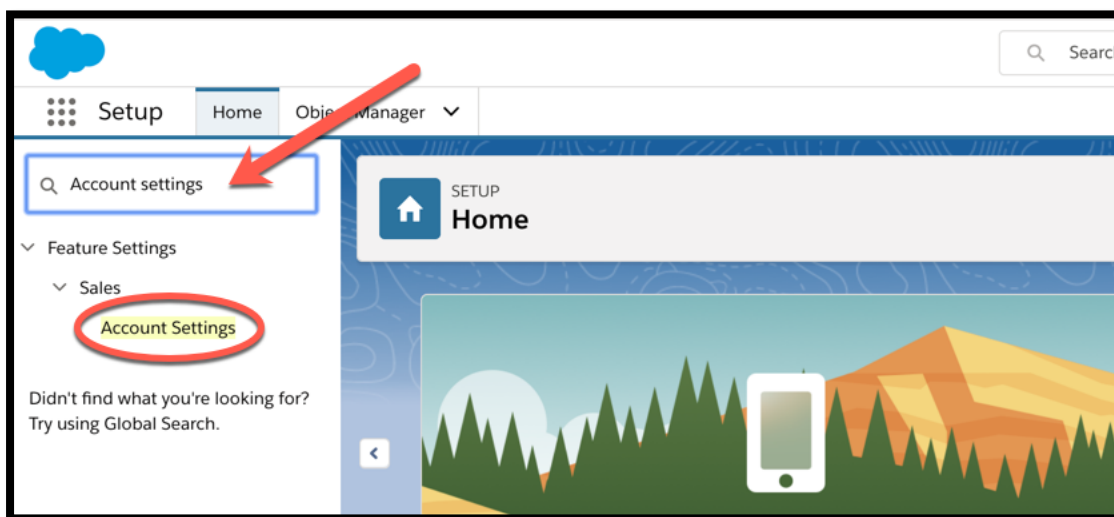1. In setup enter in Account Setting in the search bar, click on Account Settings (figure 1).
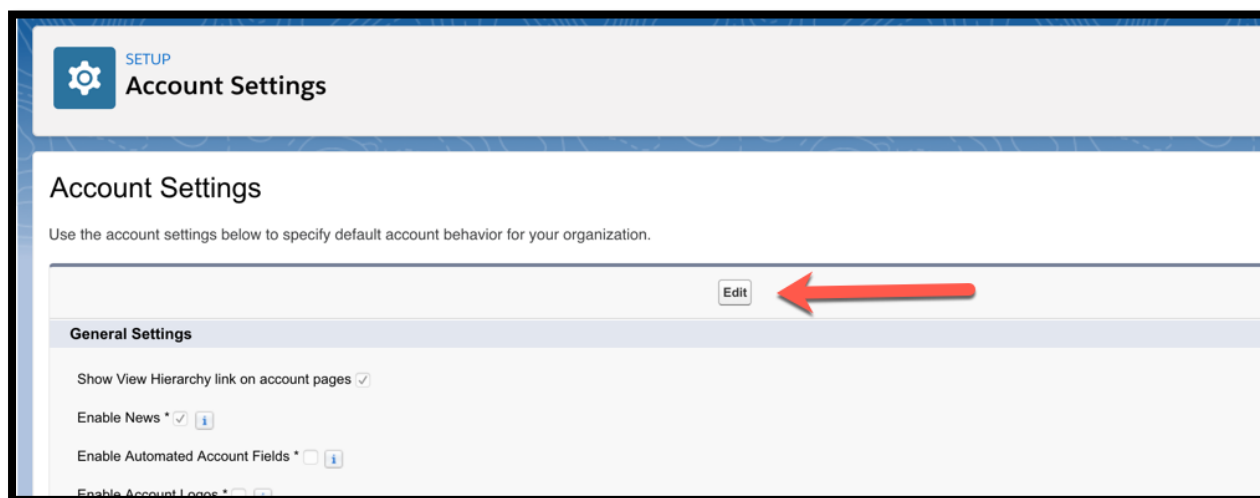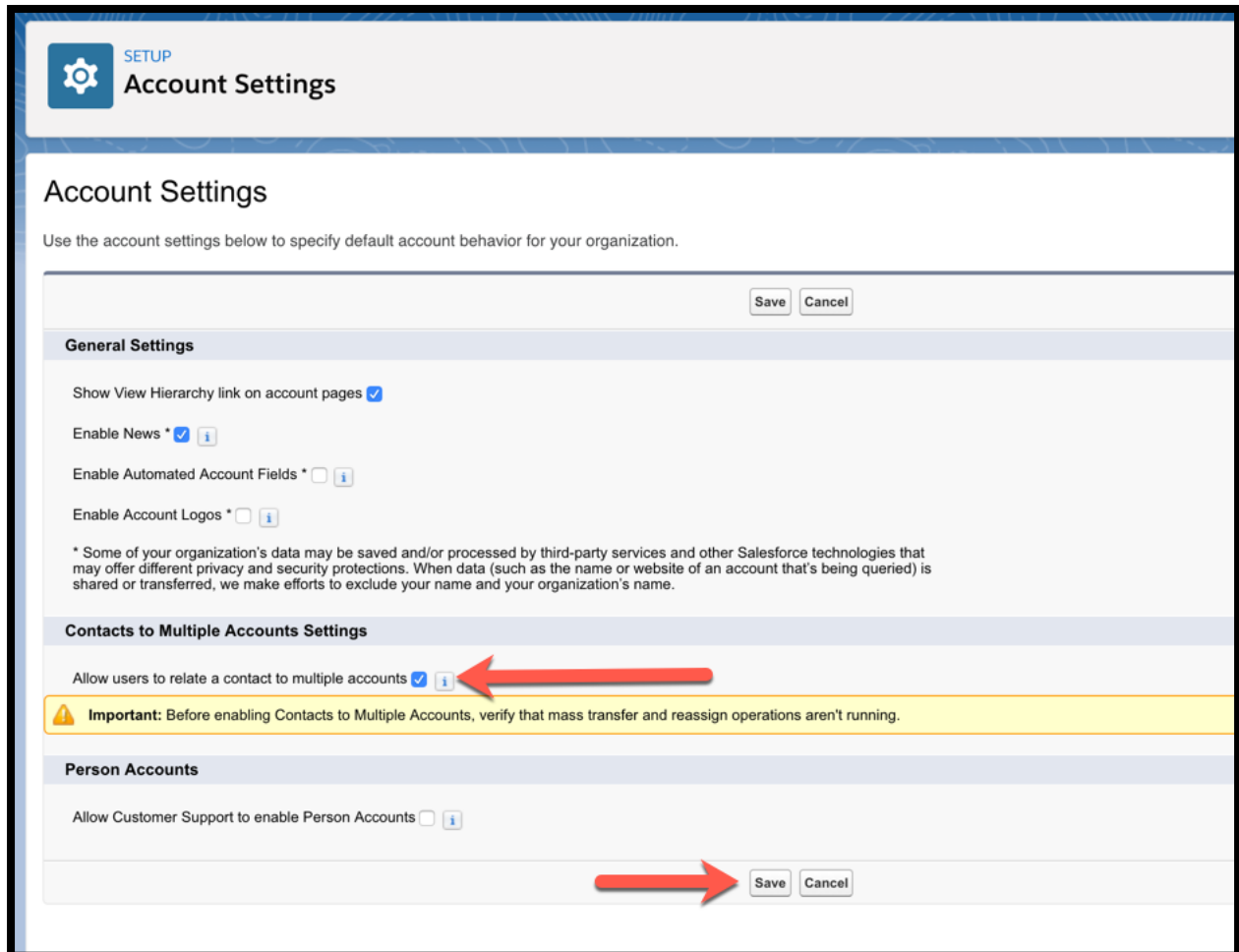

Figure 1

2. Click on Edit (figure 2).

Figure 2

3. In the Contacts to Multiple Account Settings, click the check box, click Save (figure 3). Once this this completed, return to installing Strategy Mapper.

Figure 3

Installing Strategy Mapper

1. In the AppExchange search Strategy Mapper, click on Strategy Mapper.
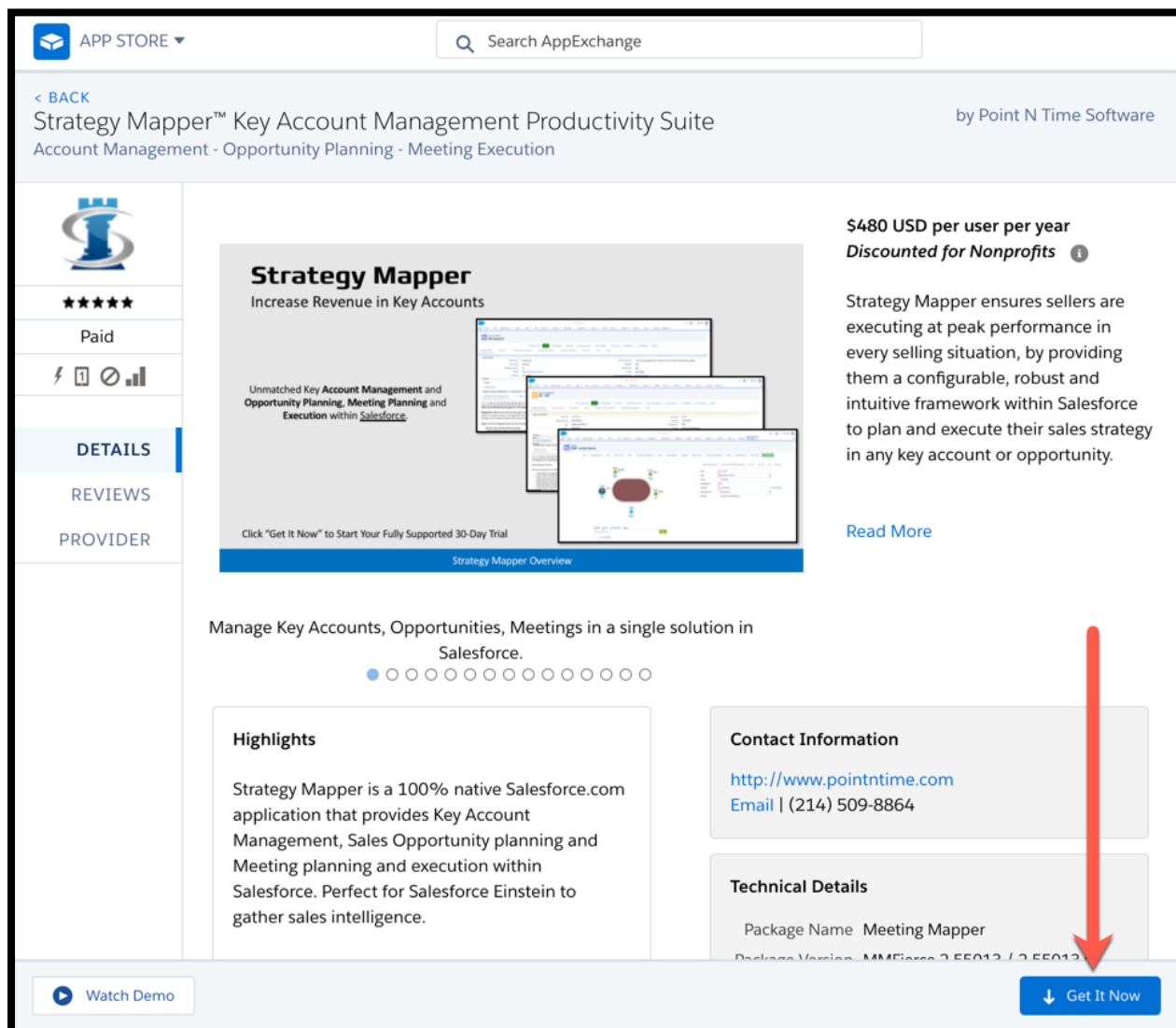2. Click on Get It Now (figure 4).

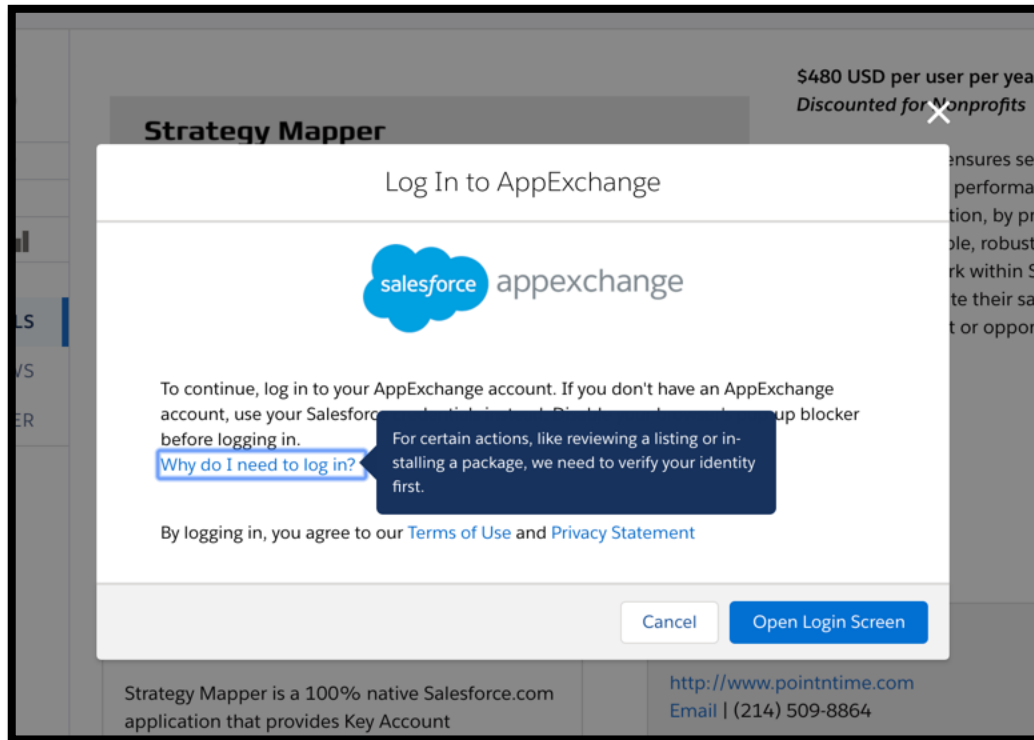*Figure 4*

3. Click on Open Login Screen (figure 5).

Figure 5

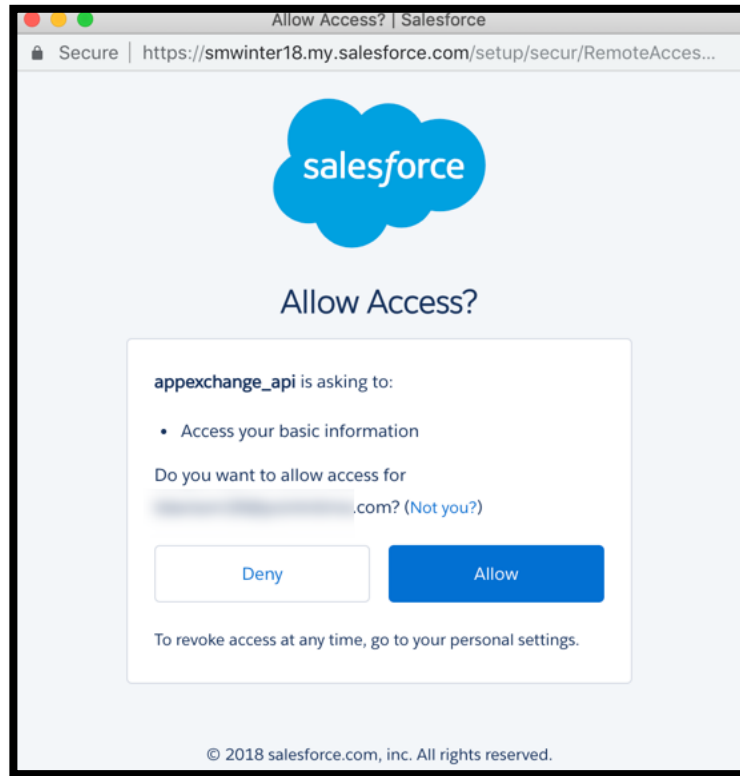4. Click Allow, to allow access to the AppExchange API (figure 6).

Figure 6

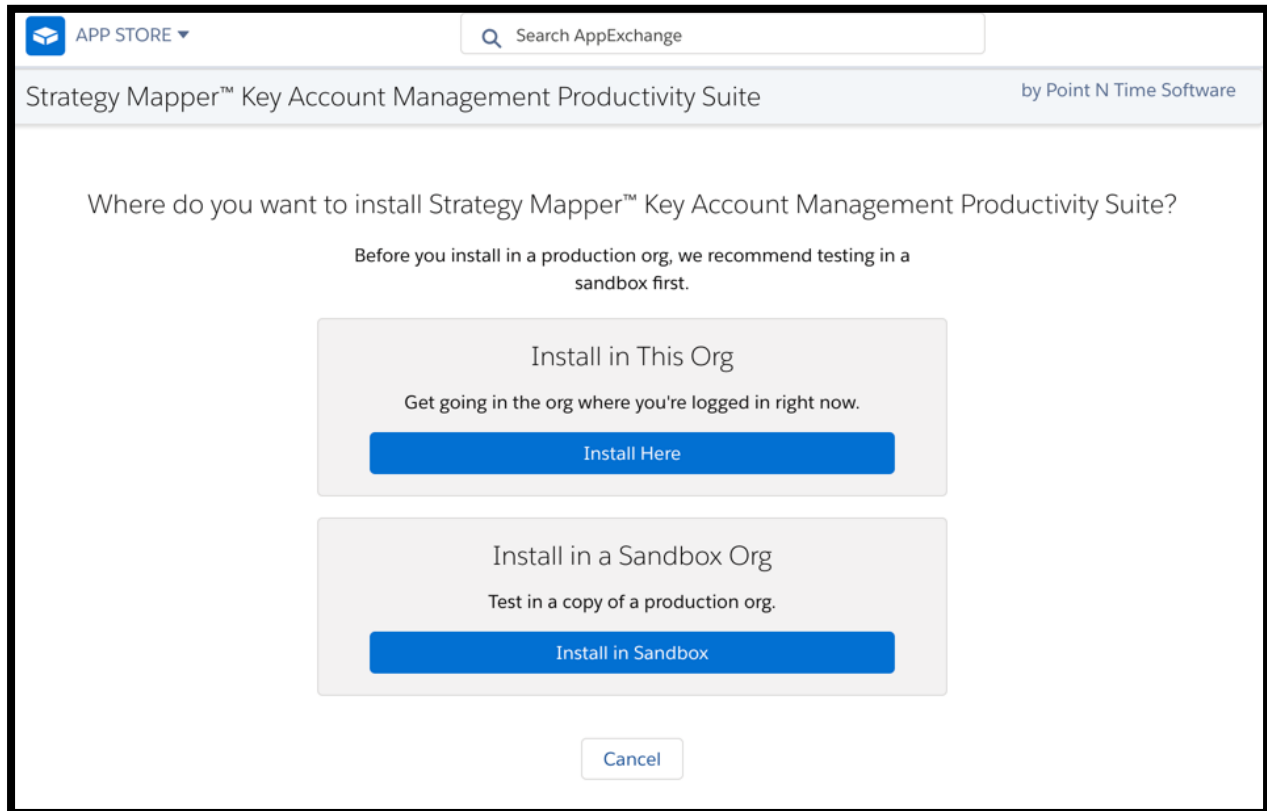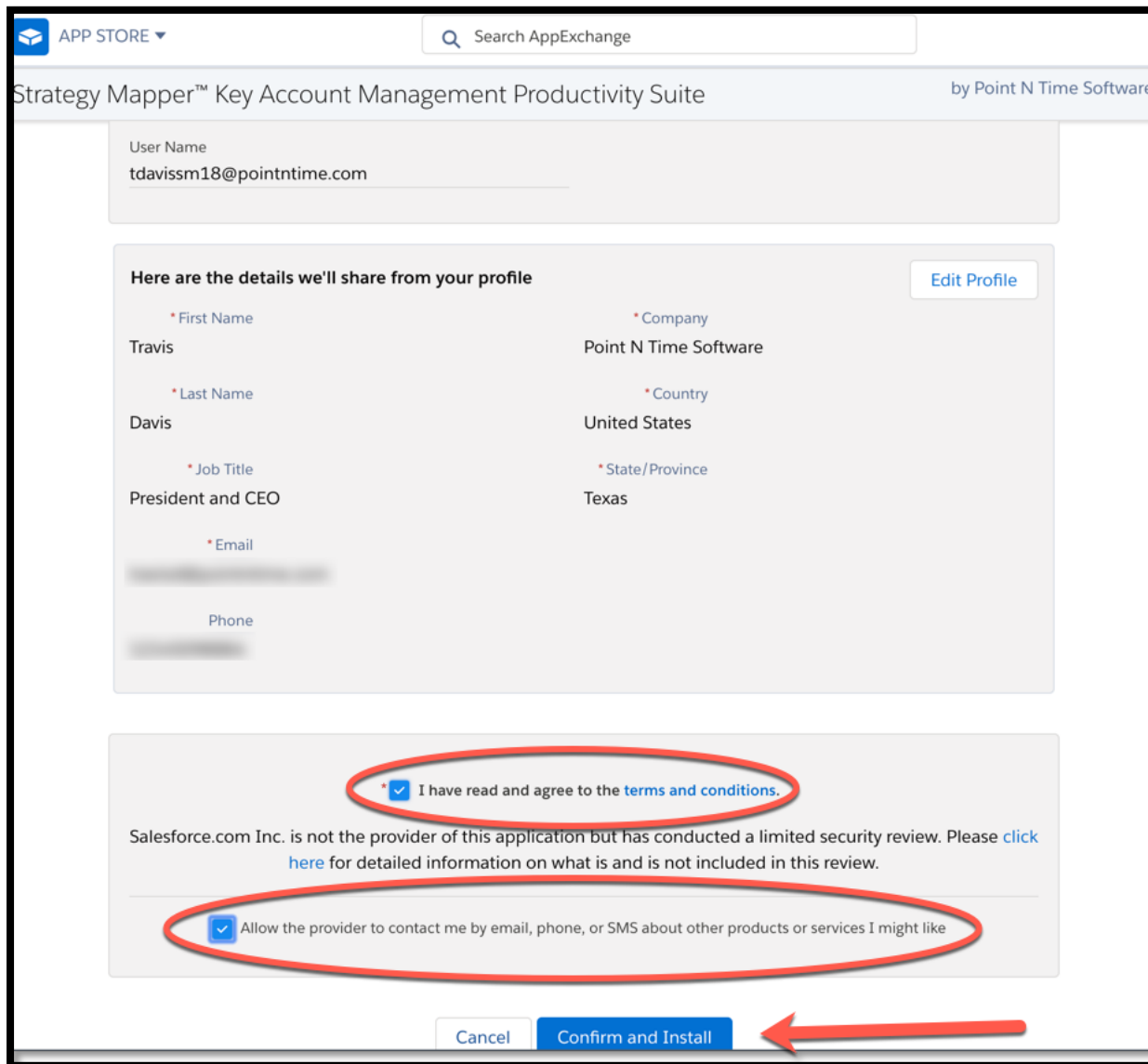5. Select the org you want to install Strategy Mapper (figure 7).

Figure 7

6. Review the information and select *'I have read and reviewed the terms and conditions'* -> click (optional) *'Allow the provider to contact me by email, phone or SMS about other products or services I might like'*.

   NOTE: Allowing the provider to contact is optional and doesn't have to be selected.

7. Click Confirm and Install (figure 8).

Figure 8

8. Leave the default setting to Install for All Users, Strategy Mapper access is managed by licenses. Salesforce users without a license will not have access to Strategy Mapper or see its components. Click Install (figure 9).
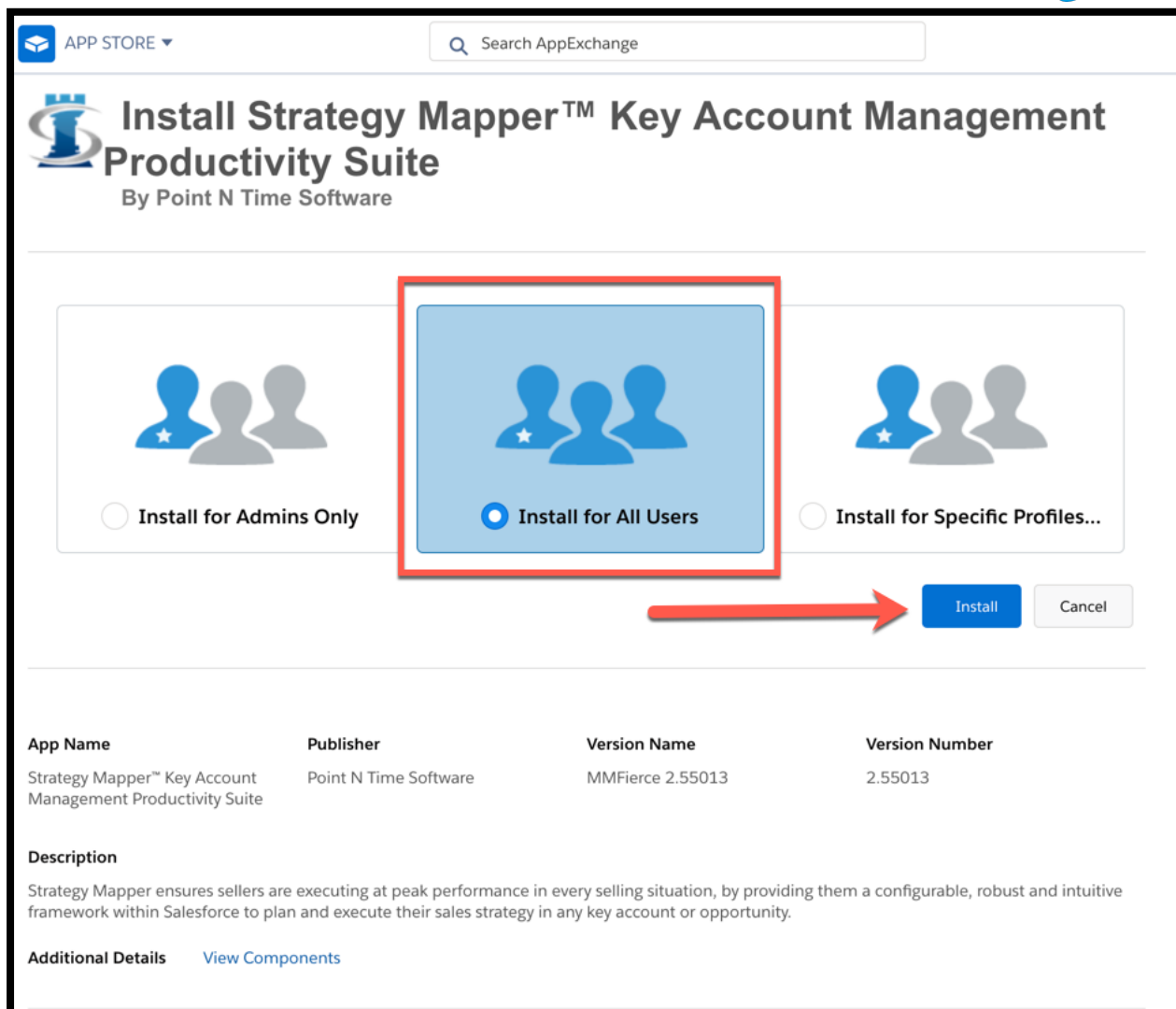
Figure 9

9. Check the box to allow 3rd party API access, click Continue (figure 10).

    NOTE: The LinkedIn APIs are for use in future releases of Strategy Mapper.

Figure 10

10. In the event you receive this error verify Contacts to Multiple Accounts is enabled (figure11). Click Done and enable Contacts to Multiple Accounts.
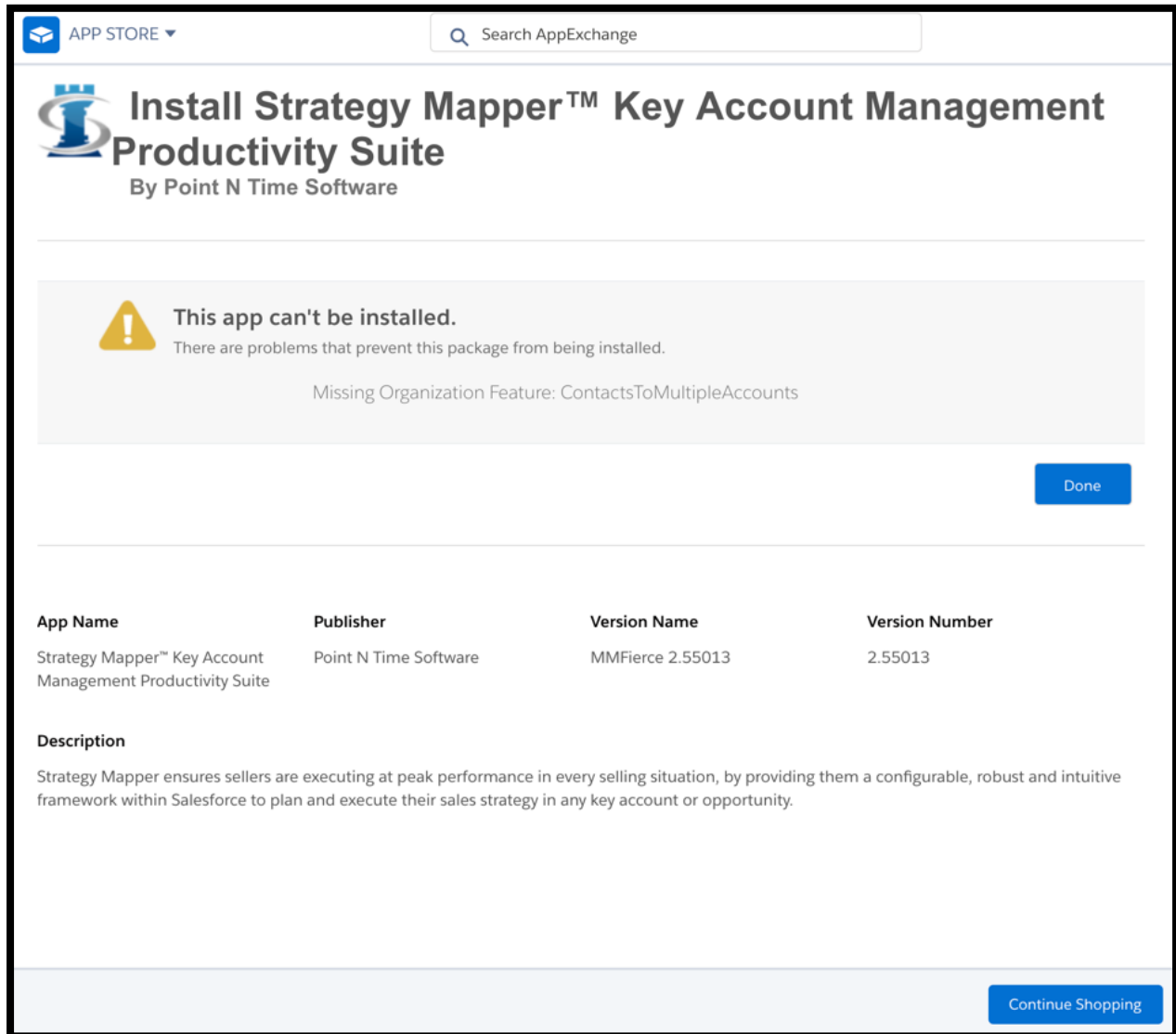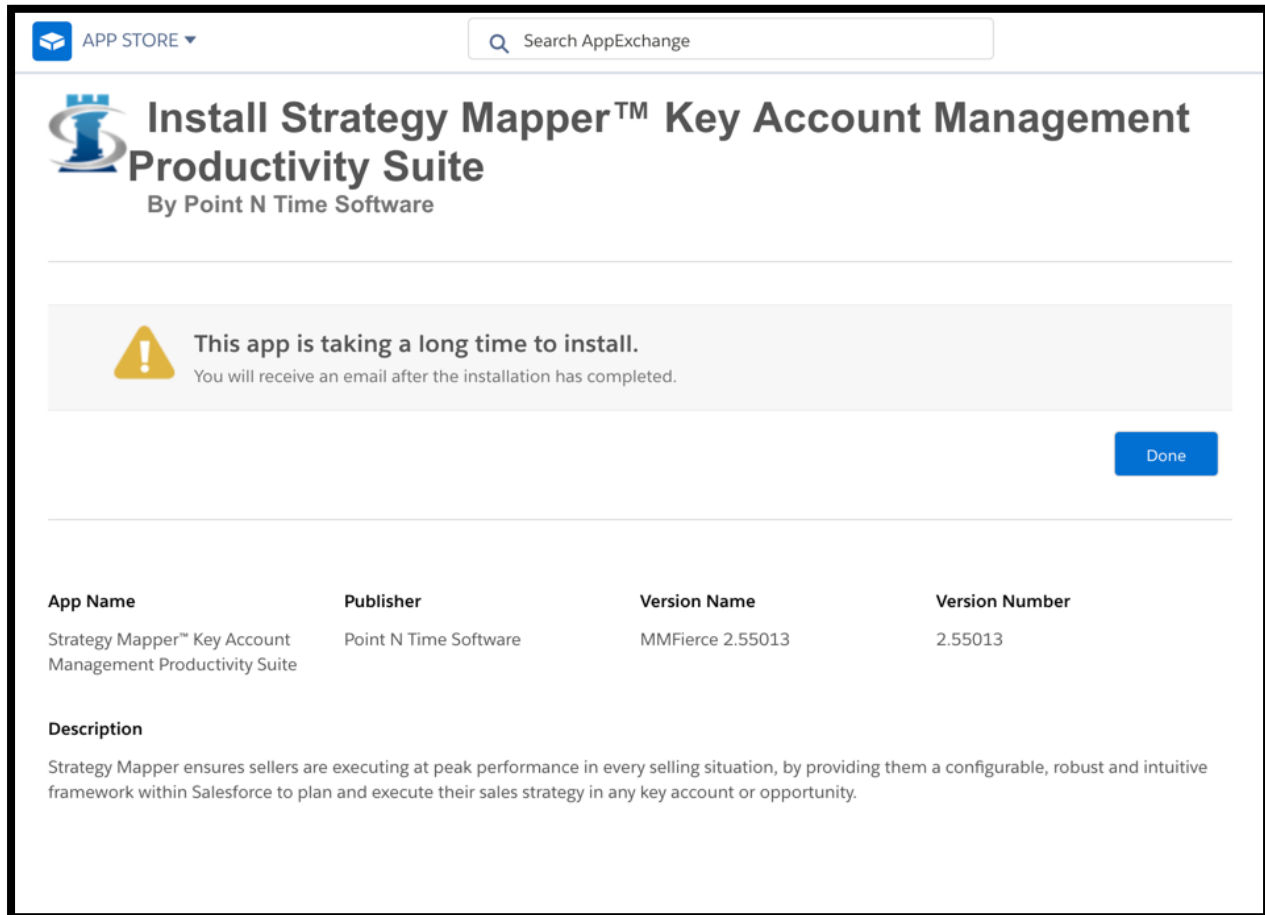
Figure 11

11. Click Done, you will receive an email from Salesforce when Strategy Mapper is installed (figure 12 & 13). After clicking Done, close the AppExchange popup window.

NOTE: The installation takes approximately 6 - 8 minutes.

Figure 12

Figure 13

Setting Up Strategy Mapper

Now that Strategy Mapper is installed it time to set it up.

Setting Up the Account Object

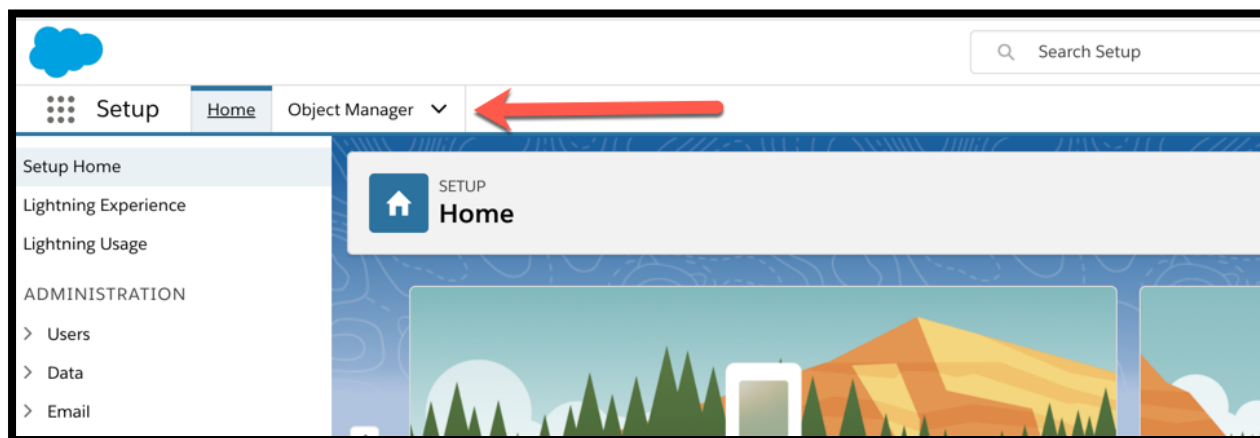1. In setting click on Click Object Manager (figure 14).

Figure 14

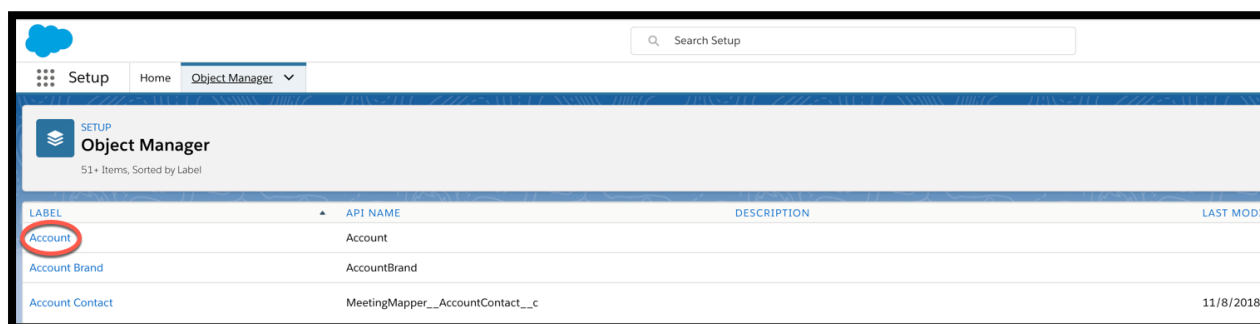2. Click on Account (figure 15).

Figure 15

3. Select Page Layouts (figure 16).

NOTE: Strategy Mapper does include a preconfigured Account page, however we recommend you modify the pages your teams are using and that are already customized to meet your business requirements.
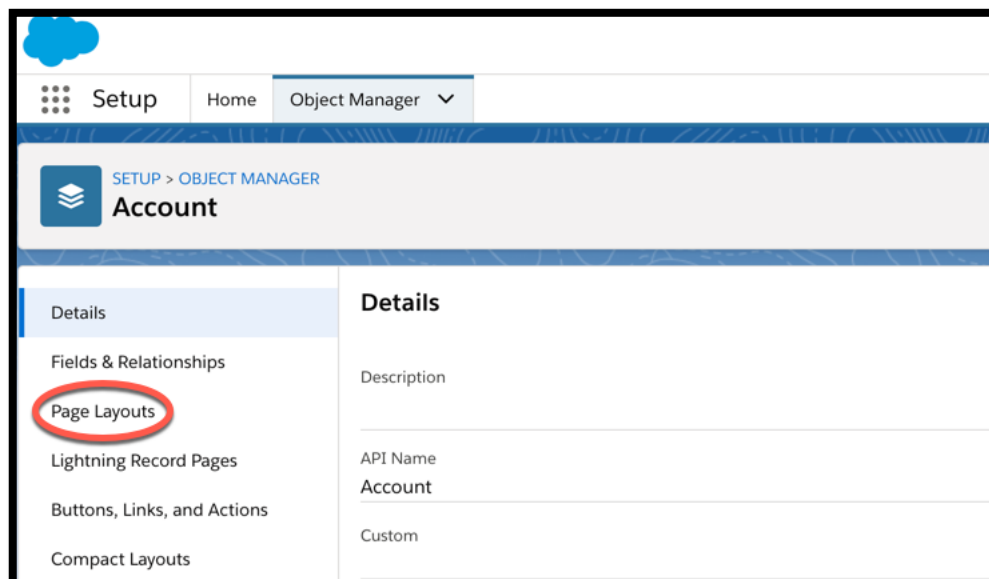
Figure 16

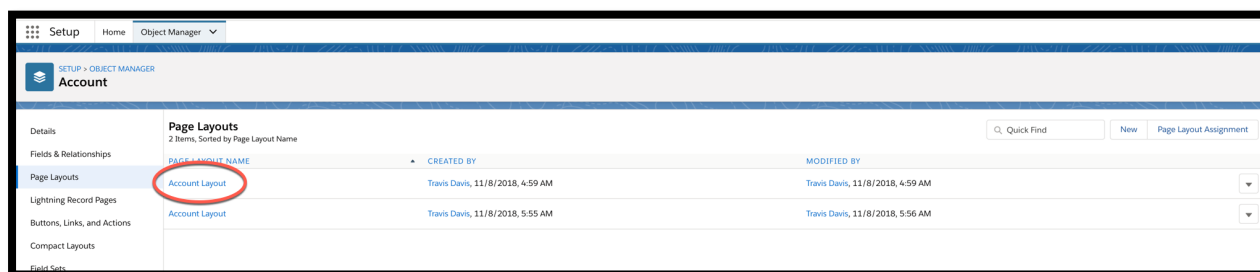4. Click on the account page to edit (figure 17).

Figure 17

5. In the Fields section select the following (figure 18):

- **Delta** – displays the difference between Estimated Total Potential, Won, Lost and Total Estimated Pipeline.
- **Estimated Total Potential** – account owner can input what they feel is the total potential for this account.
- **Lost** – displays total lost potential from opportunities closed lost.
- **Total Pipeline Potential** – displays total pipeline from open opportunities.
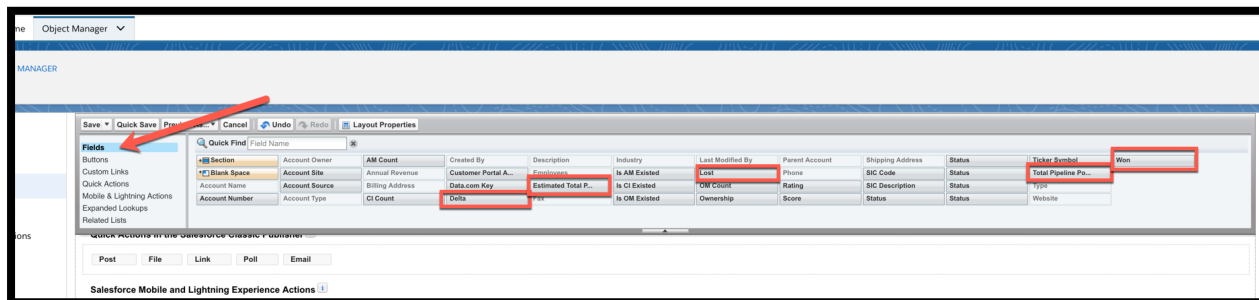- **Won** – displays total won from opportunities closed won.

Figure 18

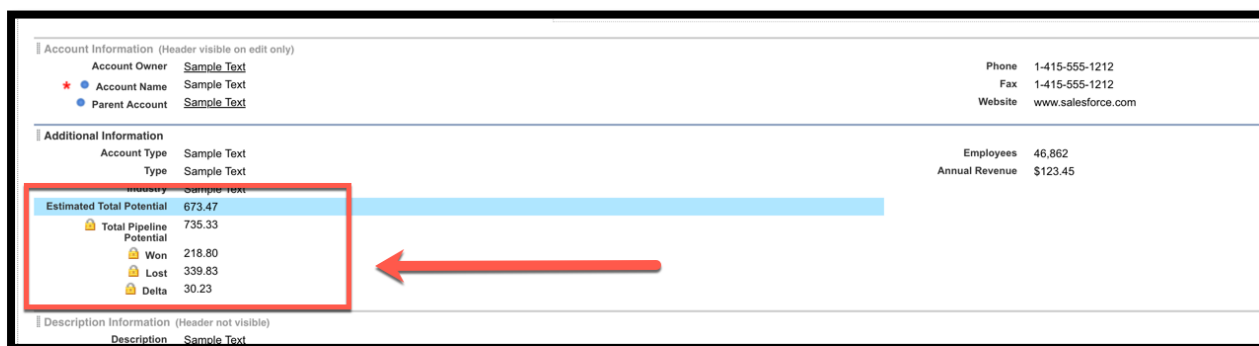6. Drag to Additional Account Information section (figure 19).

Figure 19

7. Click Buttons and select the following (figure 20):

NOTE: Buttons are used in Salesforce Classic, if you are only using Salesforce Lightning, this step doesn't need to be completed.

- **Account Action Plan** – clicking on this button will launch the Account Action Plan in PDF format.
- **Account Mapper** – clicking on this button will launch the Account Plan.
- **Account Playbook** – clicking on this button will launch the Account Playbook in PDF format.
- **Instant Meeting** – clicking on this button will launch the user into a new meeting without having to setup date and time.
- **Meeting Recap** – clicking on this button will launch a list of previous meetings to review newest to oldest.
- **Org Map** – clicking on this button will display the current Org Map.
- **SWOT** – clicking on this button will display the current SWOT+ Analysis.
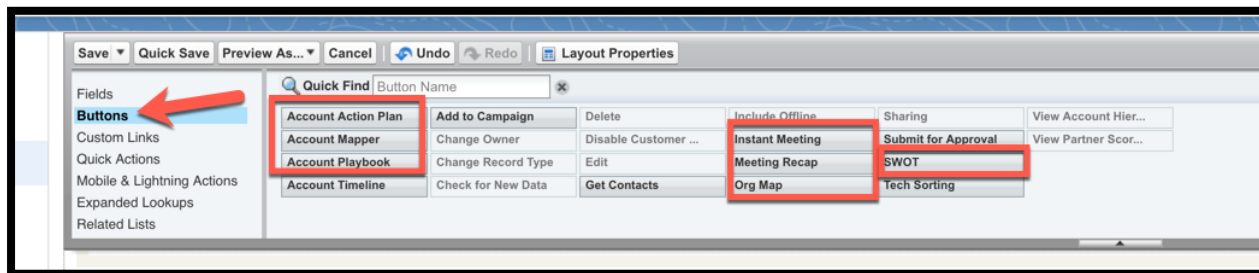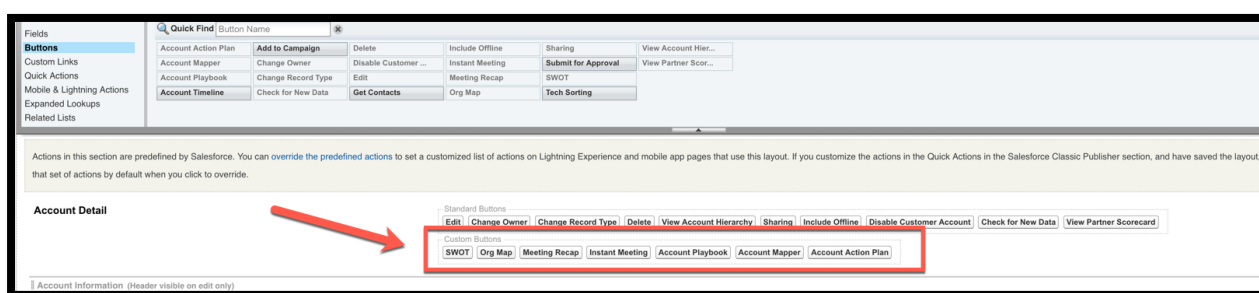
Figure 20

8. Drag to Custom Buttons (figure 21).

Figure 21

9. Click on Override the predefined actions. This allows you to add the actions to be used in Lightning (figure 22).
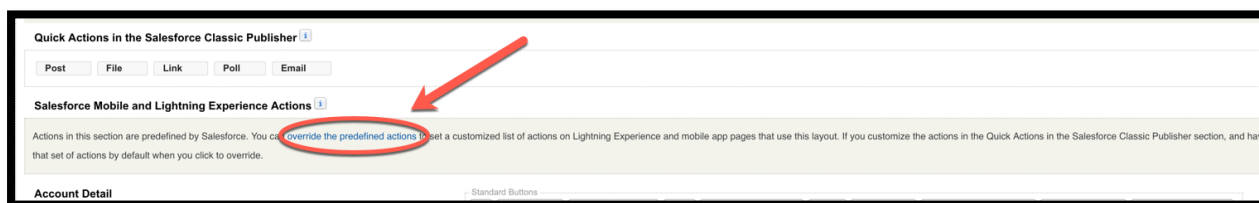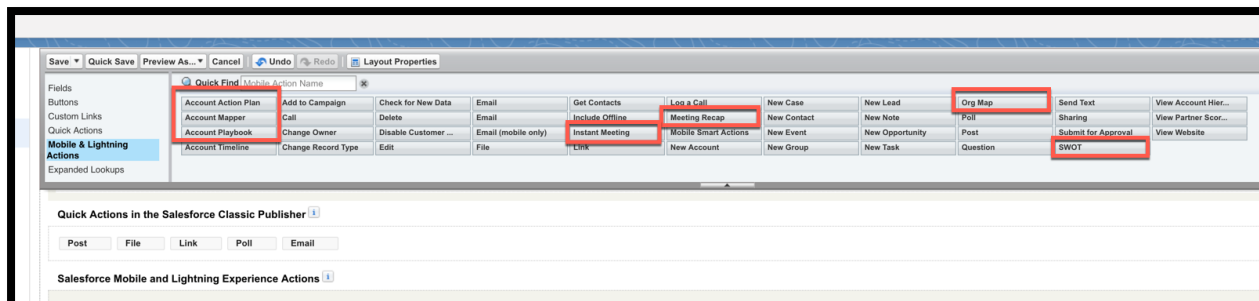

Figure 22

10. Click Mobile & Lightning Actions, select the following (figure 23):

NOTE: Buttons are used in Salesforce Lightning, if you are not using Salesforce Lightning, this step doesn't need to be completed.

- **Account Action Plan** – clicking on this button will launch the Account Action Plan in PDF format.
- **Account Mapper** – clicking on this button will launch the Account Plan.
- **Account Playbook** – clicking on this button will launch the Account Playbook in PDF format.

- **Instant Meeting** – clicking on this button will launch the user into a new meeting without having to setup date and time.
- **Meeting Recap** – clicking on this button will launch a list of previous meetings to review newest to oldest.
- **Org Map** – clicking on this button will display the current Org Map.
- **SWOT** – clicking on this button will display the current SWOT+ Analysis.

Figure 23

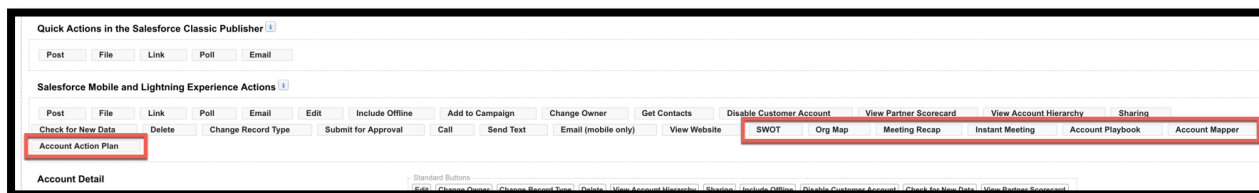11. Drag to Salesforce Mobile and Lightning Experience Actions (figure 24).

Figure 24

12. Click Related Lists add the following (figure 25):

- **Meetings** – displays all meetings linked to this account or opportunities in this account. Users can also click New to plan and schedule meetings in the future or edit meetings.
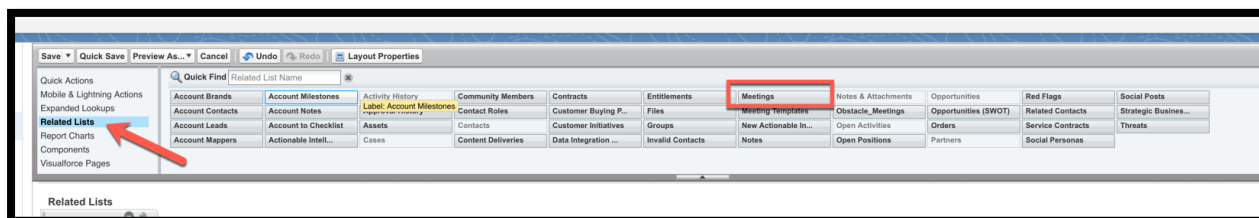
Figure 25

13. Drag Meetings to anywhere in the related list section (figure 26).
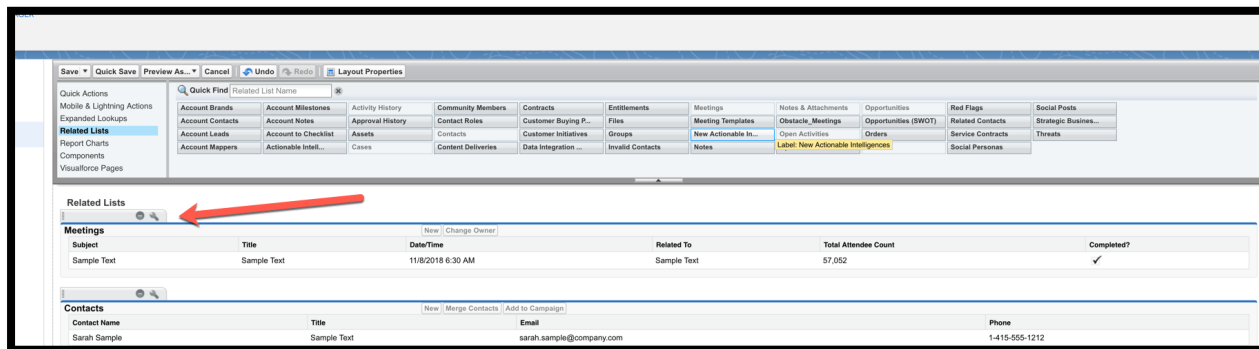
Figure 26

14. Click Save (figure 27).
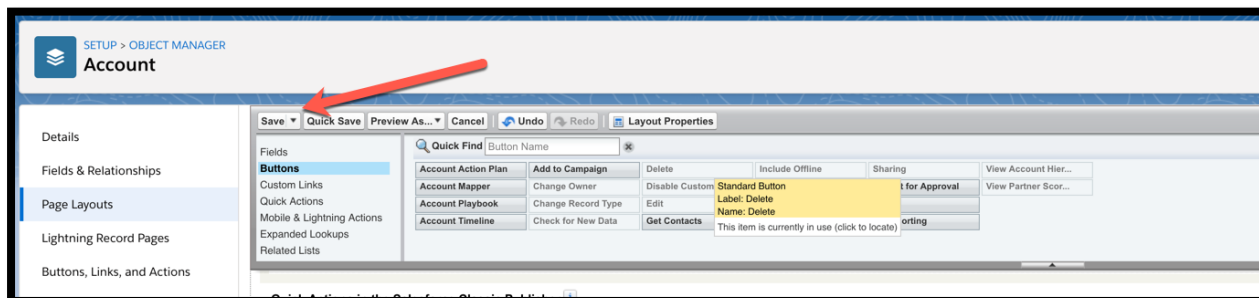
Figure 27

15. Click Save to save your modifications (figure 28).
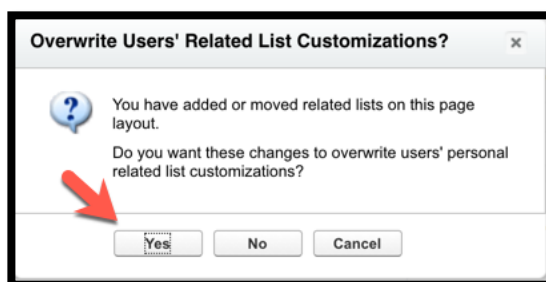
Figure 28

Setting Up the Opportunity Object

1. In setting click on Click Object Manager (figure 29).
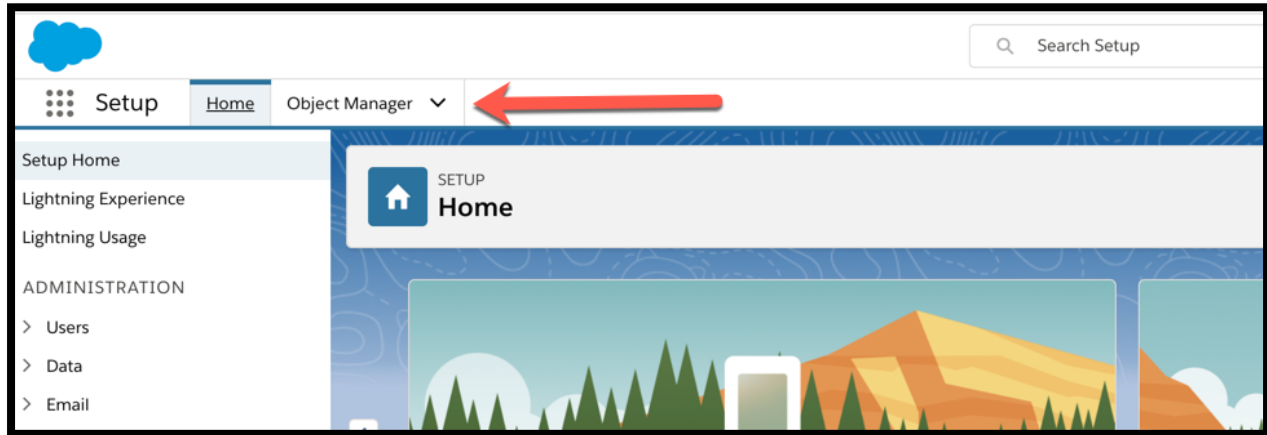
Figure 29

2. Click on Opportunity (figure 30).
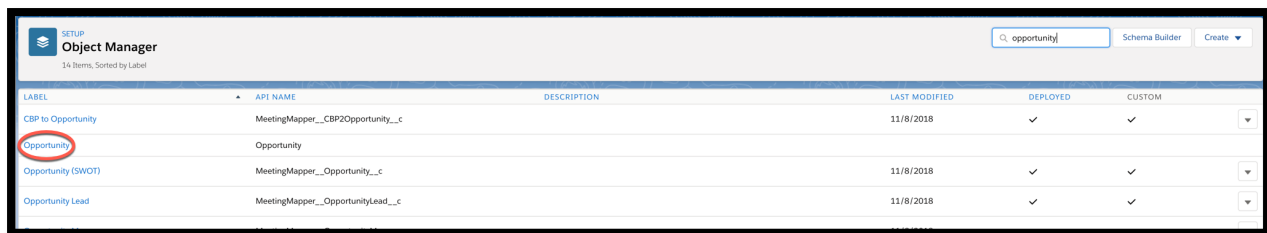
Figure 30

3. Select Page Layouts (figure 31)

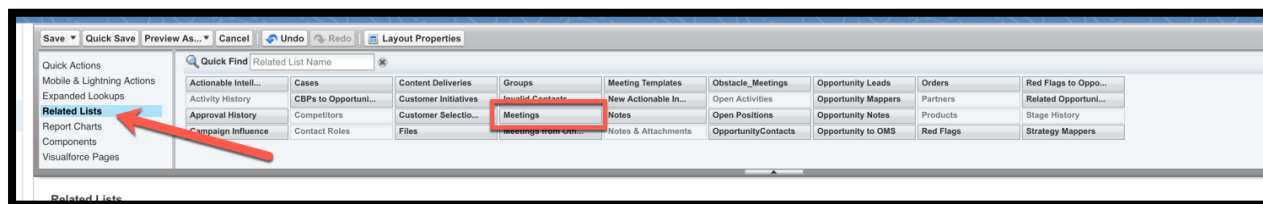*NOTE: Strategy Mapper does include a preconfigured Opportunity page, however we recommend you modify the pages your teams are using and that are already customized to meet your business requirements.*
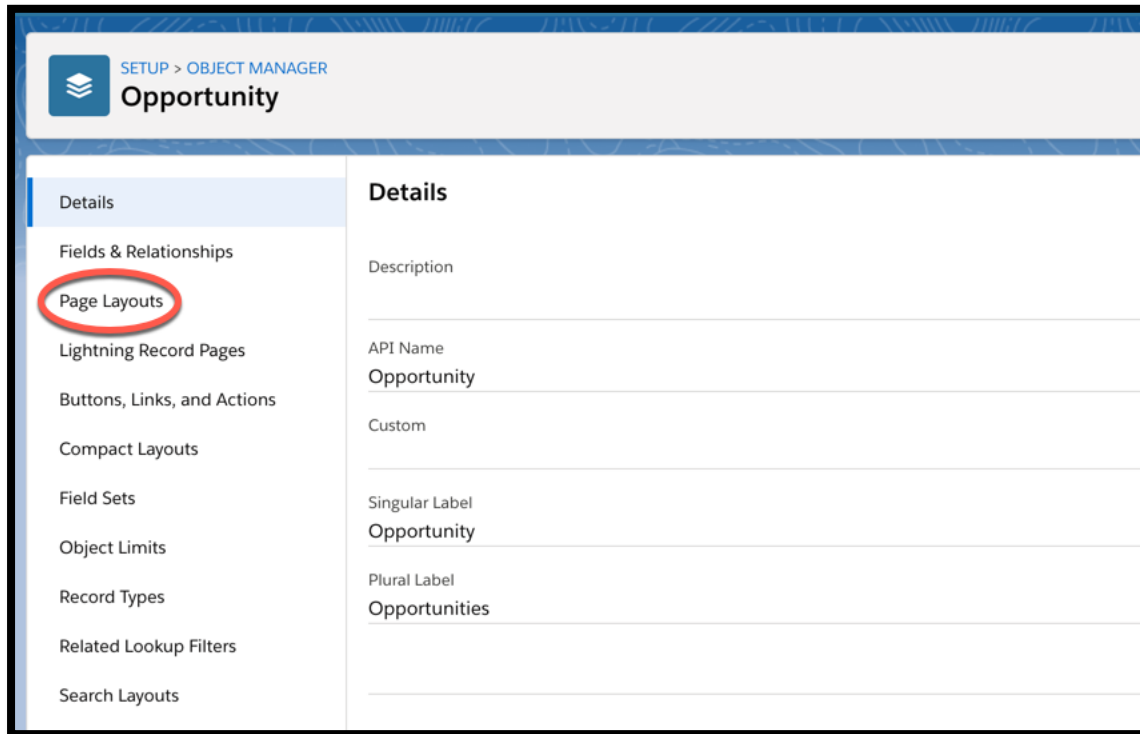
Figure 31

4. Click on the opportunity page to edit (figure 32).
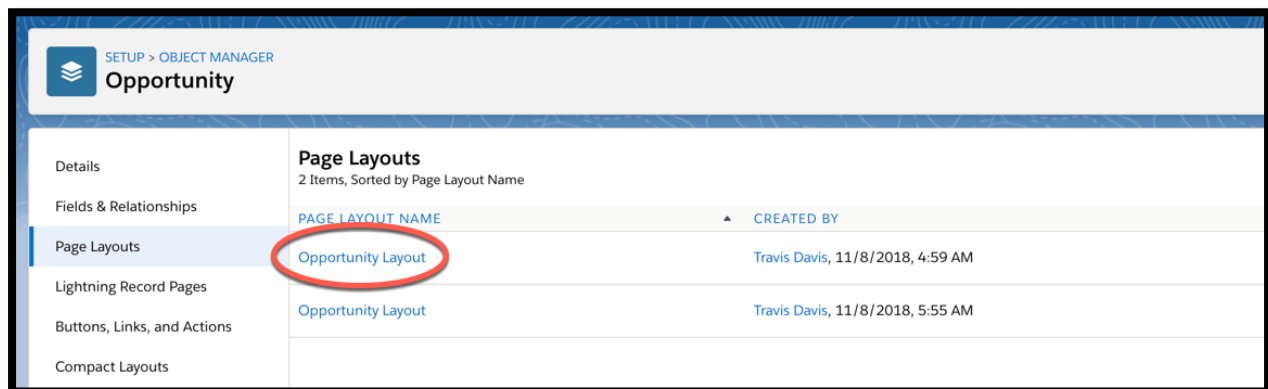
Figure 32

5. Click Buttons and select the following (figure 33):
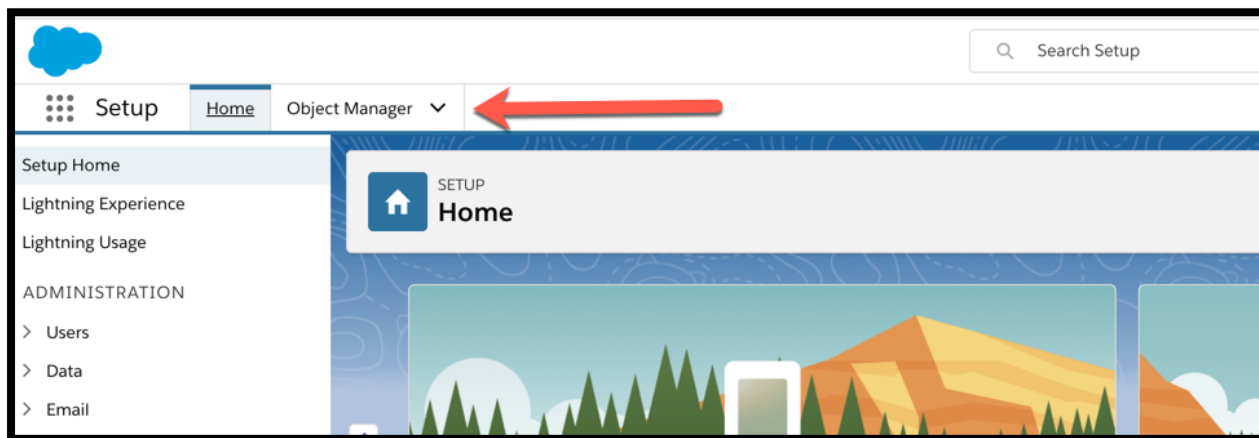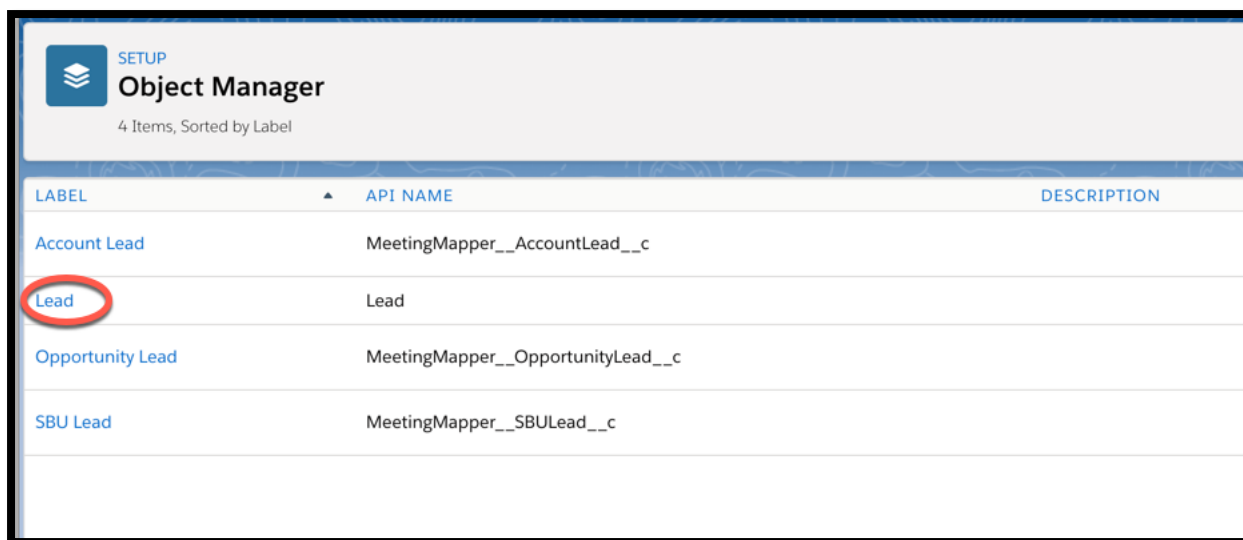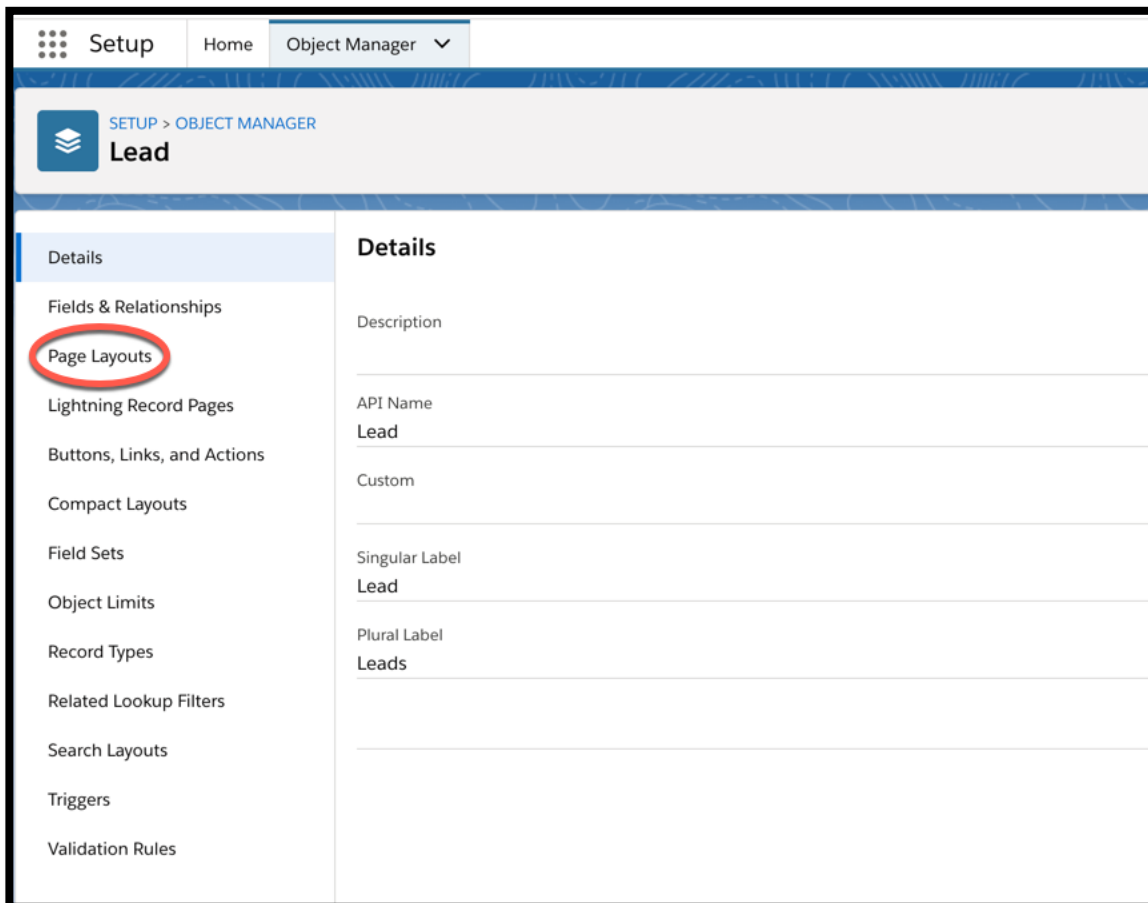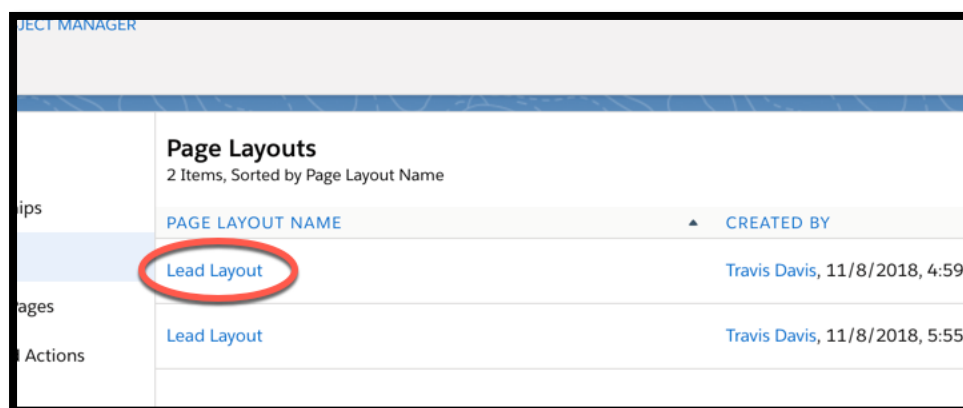
NOTE: Buttons are used in Salesforce Classic, if you are only using Salesforce Lightning, this step doesn't need to be completed.

- **Instant Meeting** – clicking on this button will launch the user into a new meeting without having to setup date and time.

- **Meeting Recap** – clicking on this button will launch a list of previous meetings to review newest to oldest.
- **Opportunity Action Plan** – clicking on this button will launch the Account Action Plan in PDF format.
- **Opportunity Mapper** – clicking on this button will launch the Account Plan.
- **Opportunity Playbook** – clicking on this button will launch the Account Playbook in PDF format.
- **Org Map** – clicking on this button will display the current Org Map.
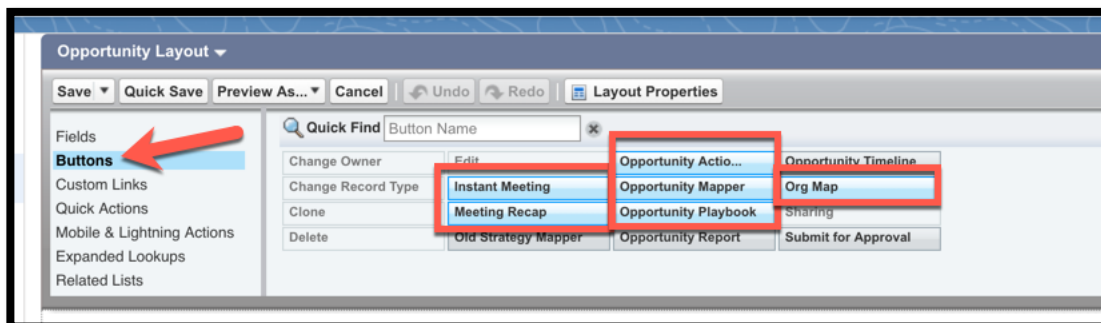
Figure 33

6. Drag to Custom Buttons (figure 34).

Figure 34

7. Click on Override the predefined actions. This allows you to add the actions that are able to be used in Lightning (figure 35).

Figure 35

8. Click Mobile & Lightning Actions, select the following (figure 36):

NOTE: Buttons are used in Salesforce Lightning, if you are not using Salesforce Lightning, this step doesn't need to be completed.

- **Instant Meeting** – clicking on this button will launch the user into a new meeting without having to setup date and time.

- **Meeting Recap** – clicking on this button will launch a list of previous meetings to review newest to oldest.
- **Opportunity Action Plan** – clicking on this button will launch the Account Action Plan in PDF format.
- **Opportunity Mapper** – clicking on this button will launch the Account Plan.
- **Opportunity Playbook** – clicking on this button will launch the Account Playbook in PDF format.
- **Opportunity Report** – clicking will display all the meetings linked to this opportunity in a single PDF for review.
- **Org Map** – clicking on this button will display the current Org Map.

NOTE: There are two Opportunity Mappers and Org Map, ensure you select the ones highlighted below.
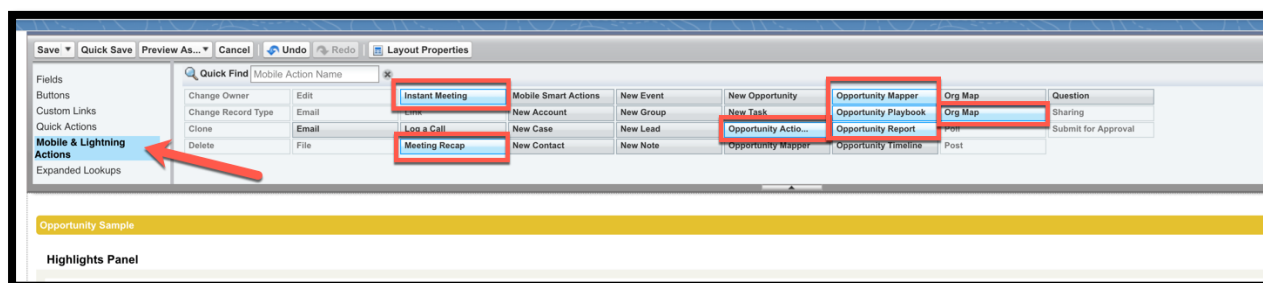
Figure 36

9. Drag to Salesforce Mobile and Lightning Experience Actions (figure 37).
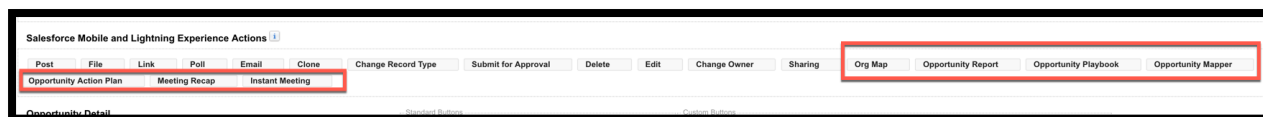
Figure 37

10. Click Related Lists add the following (figure 38):

- **Meetings** – displays all meetings linked to the opportunity. Users can also click New to plan and schedule meetings in the future or edit meetings.
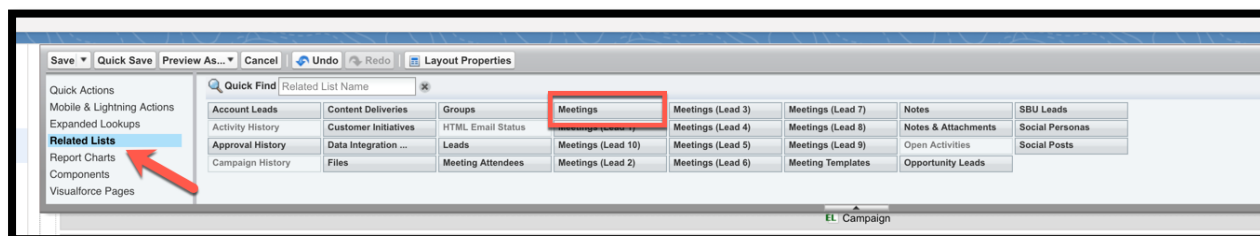

Figure 38

11. Drag Meetings to anywhere in the related list section (figure 39).
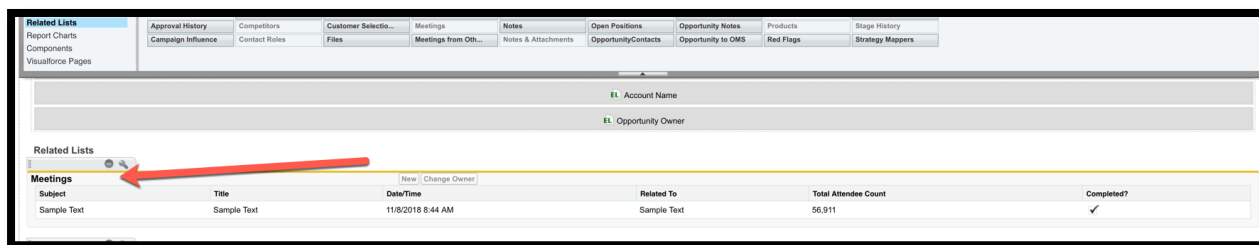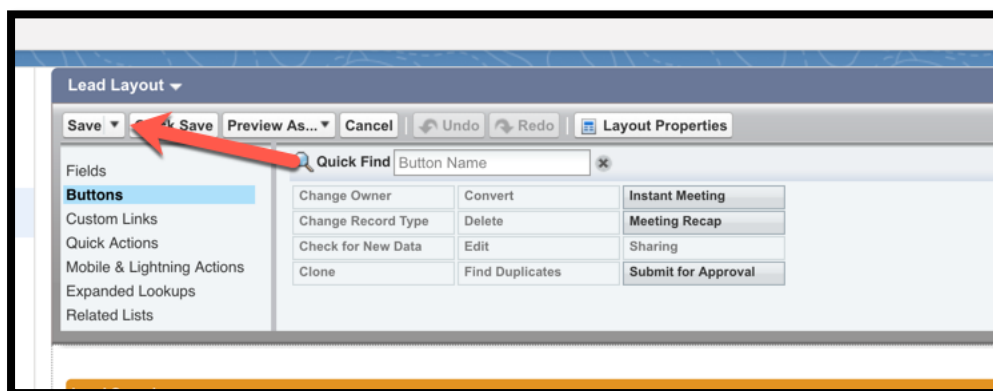

Figure 39

12. Click Save (figure 40).
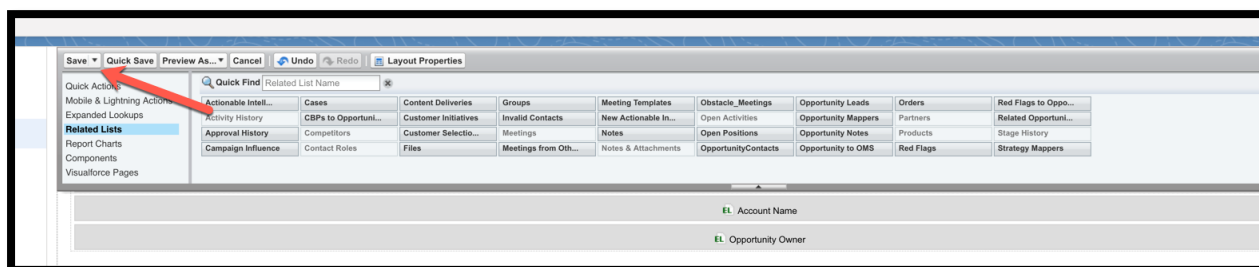
Figure 40

13. Click Yes to save the modifications (figure 41).
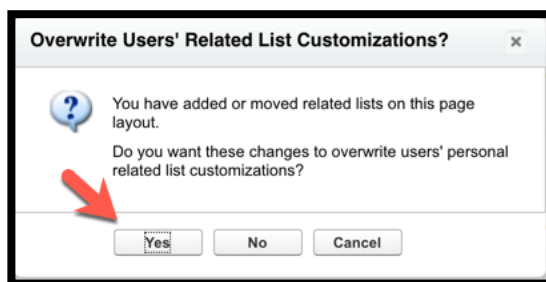
Figure 41

Setting Up the Lead Object

1. In setting click on Click Object Manager (figure 42).
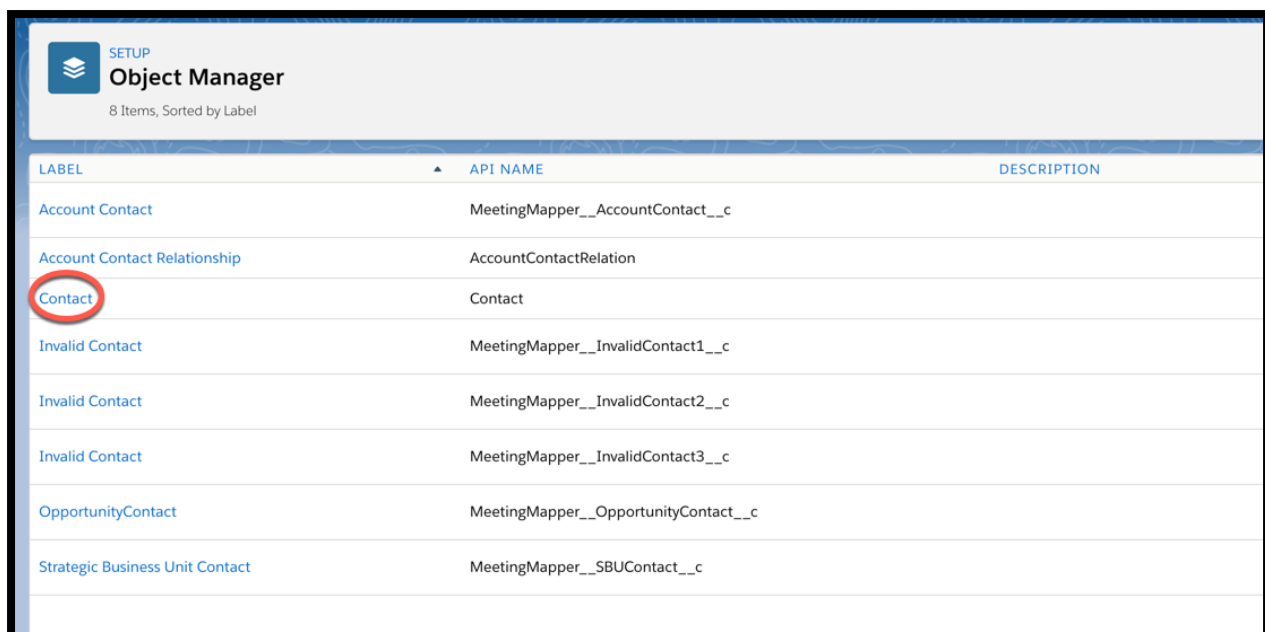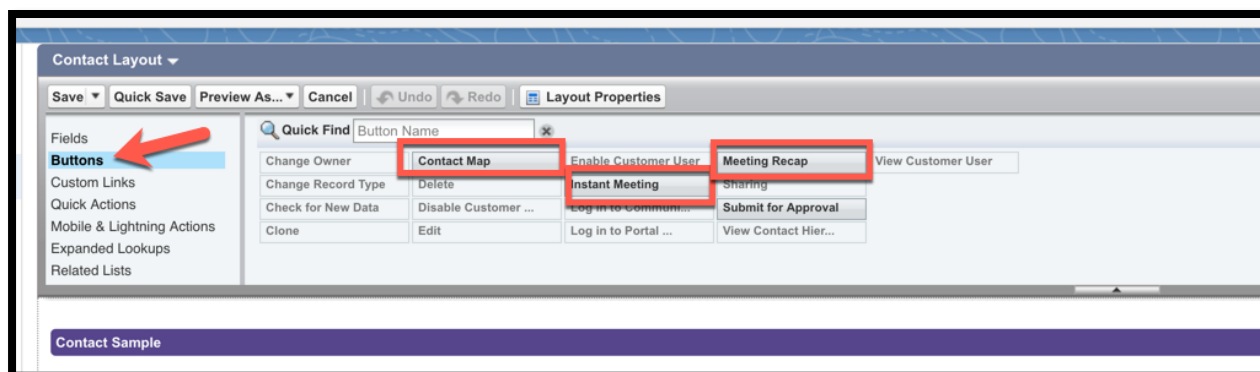

Figure 42

2. Click on Lead (figure 43).

Figure 43

3. Select Page Layouts (figure 44)

NOTE: Strategy Mapper does include a preconfigured Lead page, however we recommend you modify the pages your teams are using and that are already customized to meet your business requirements.

Figure 44

4. Click on the Lead page to edit (figure 45).

Figure 45

5. Click Buttons and select the following (figure 46):

NOTE: Buttons are used in Salesforce Classic, if you are only using Salesforce Lightning, this step doesn't need to be completed.

- **Instant Meeting** – clicking on this button will launch the user into a new meeting without having to setup date and time.
- **Meeting Recap** – clicking on this button will launch a list of previous meetings to review newest to oldest.
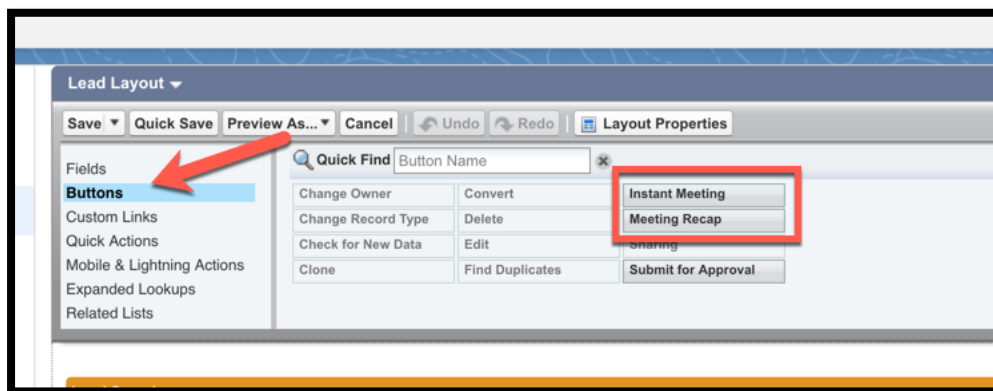
Figure 46

6. Drag to Custom Buttons (figure 47).
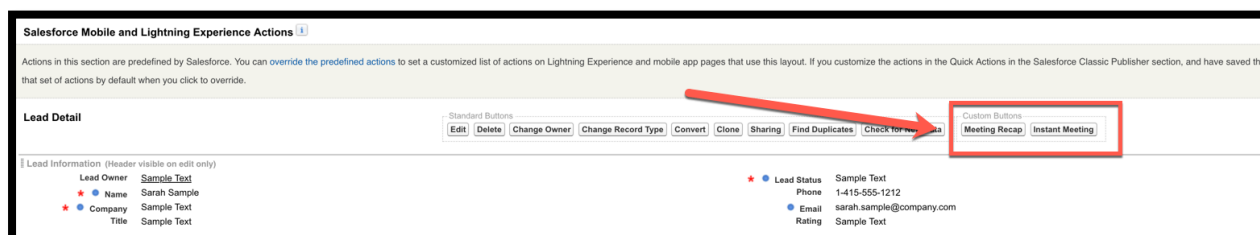
Figure 47

7. Click on Override the predefined actions. This allows you to add the actions being used in Lightning (figure 48).

Figure 48

8. Click Mobile & Lightning Actions, select the following (figure 49):

NOTE: Buttons are used in Salesforce Lightning, if you are not using Salesforce Lightning, this step doesn't need to be completed.

- **Instant Meeting** – clicking on this button will launch the user into a new meeting without having to setup date and time.
- **Meeting Recap** – clicking on this button will launch a list of previous meetings to review newest to oldest.
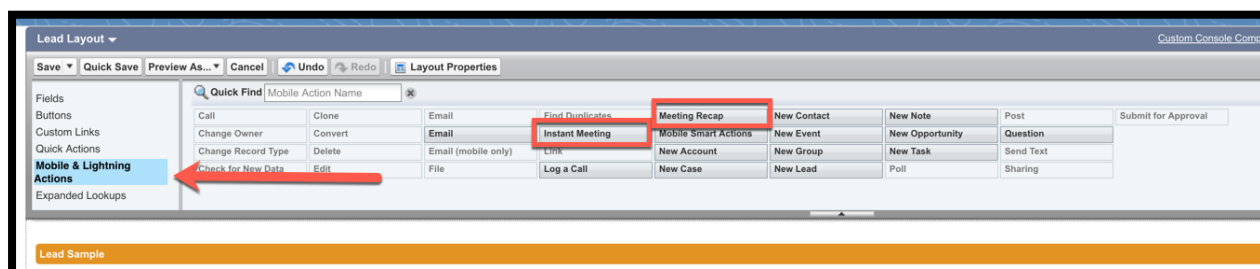
Figure 49

9. Drag to Salesforce Mobile and Lightning Experience Actions (figure 50).
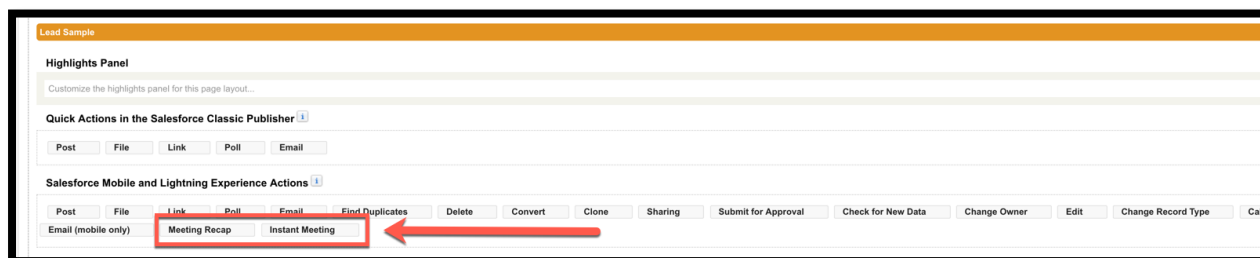
Figure 50

10. Click Related Lists add the following (figure 51):

- **Meetings** – displays all meetings linked to the Lead. Users can also click New to plan and schedule meetings in the future or edit meetings.

Figure 51

11. Drag Meetings to anywhere in the related list section (figure 52).
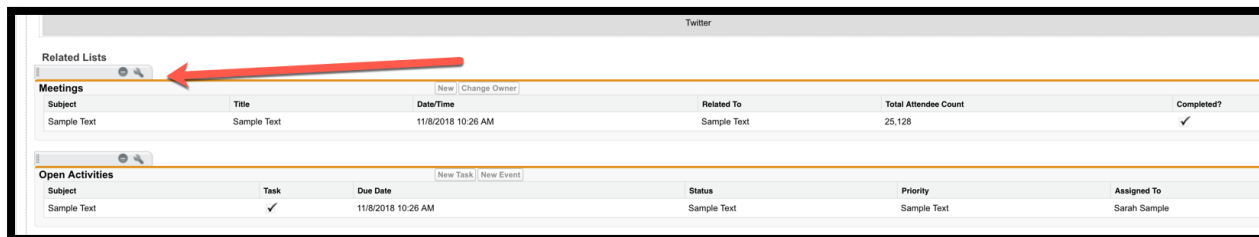
Figure 52

12. Click Save (figure 53).

Figure 53

13. Click Yes to save the modifications (figure 53).
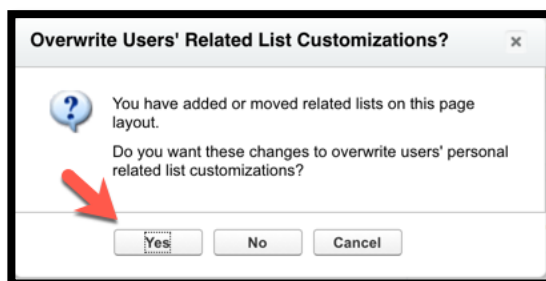
Figure 54

Setting Up the Contact Object

1. In setting click on Click Object Manager (figure 55).
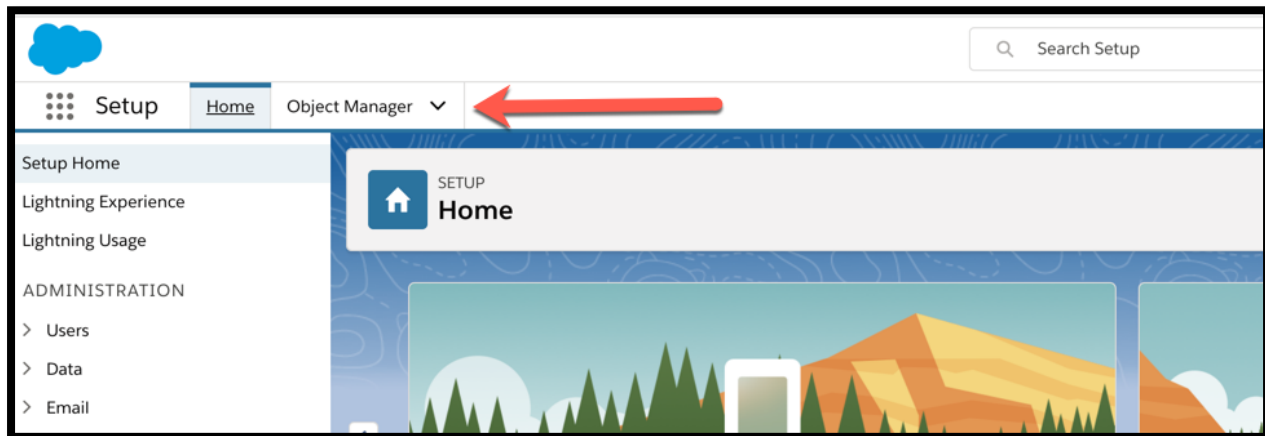
Figure 55

2. Click on Contact (figure 56).

Figure 56

3. Select Page Layouts (figure 57)

NOTE: Strategy Mapper does include a preconfigured Lead page, however we recommend you modify the pages your teams are using and that are already customized to meet your business requirements.
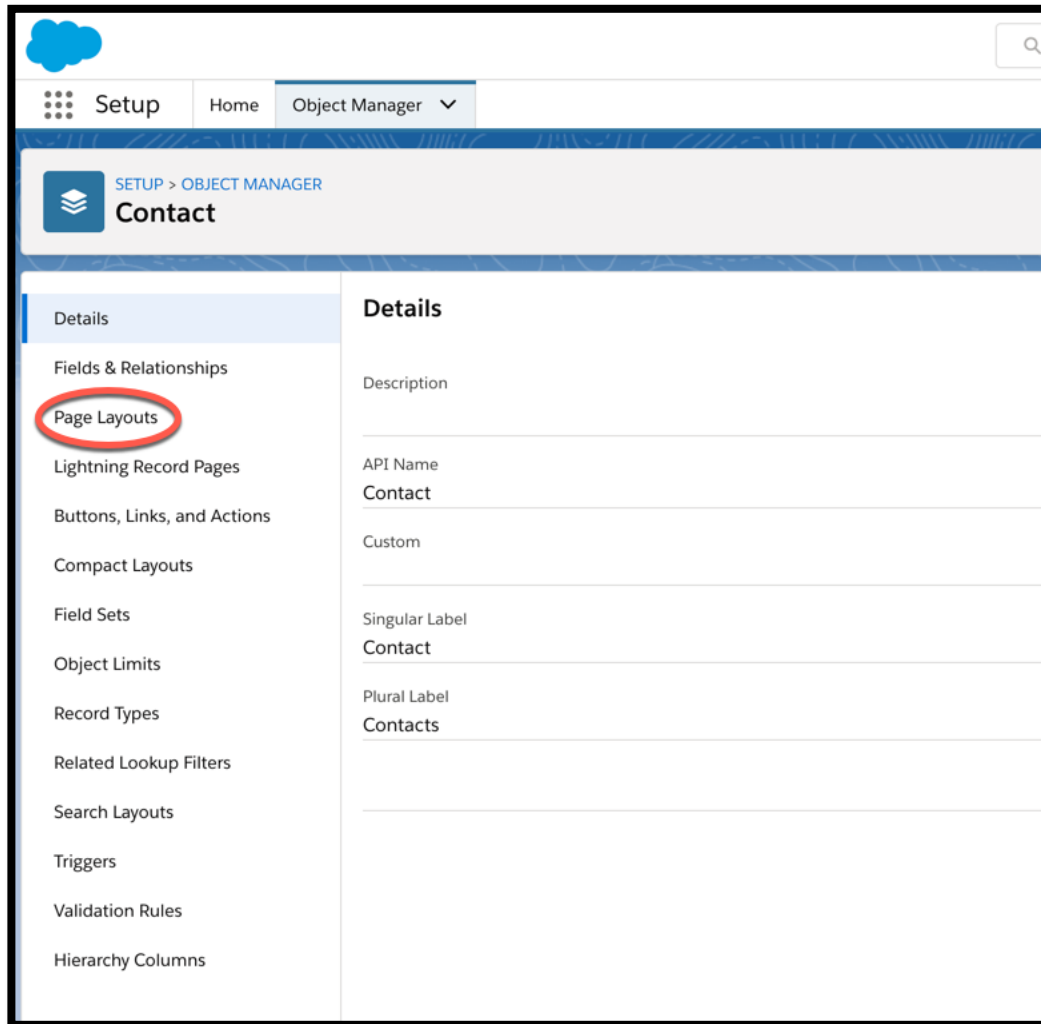
Figure 57

4. Click on the Contact page you want to edit (figure 58).
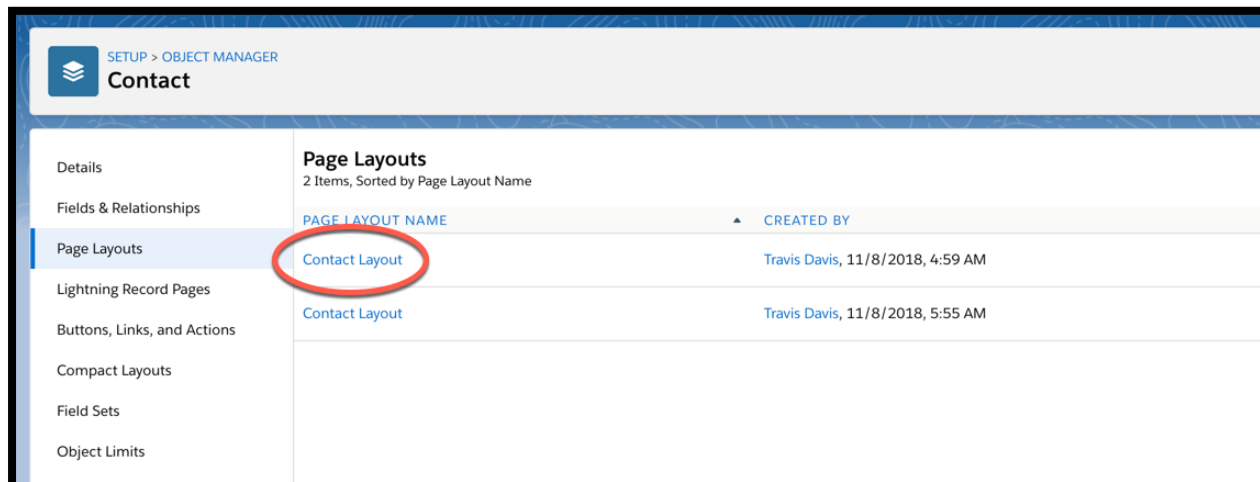
Figure 58

5. Click Buttons and select the following (figure 59):

NOTE: Buttons are used in Salesforce Classic, if you are only using Salesforce Lightning, this step doesn't need to be completed.

- **Contact Map** – clicking will launch the contact map for the contact, this allows the users to build relationship between contacts.
- **Instant Meeting** – clicking on this button will launch the user into a new meeting without having to setup date and time.
- **Meeting Recap** – clicking on this button will launch a list of previous meetings to review newest to oldest.

Figure 59

6. Drag to Custom Buttons (figure 60).
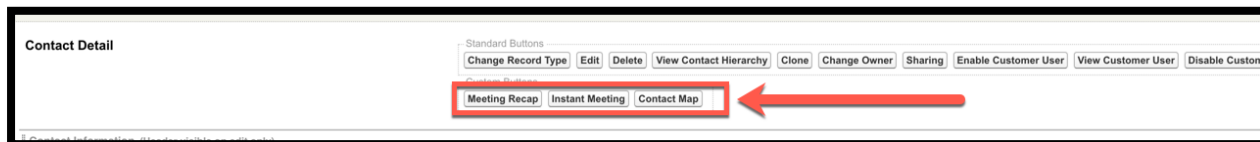
Figure 60

7. Click on Override the predefined actions. This allows you to add the actions that are able to be used in Lightning (figure 61).
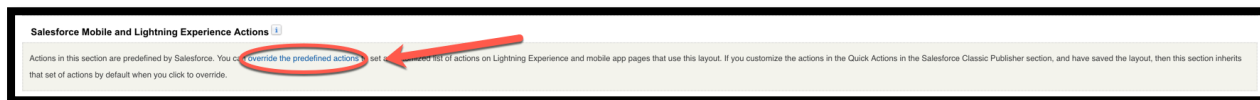
Figure 61

8. Click Mobile & Lightning Actions, select the following (figure 62):

NOTE: Buttons are used in Salesforce Lightning, if you are not using Salesforce Lightning, this step doesn't need to be completed.

- **Instant Meeting** – clicking on this button will launch the user into a new meeting without having to setup date and time.
- **Meeting Recap** – clicking on this button will launch a list of previous meetings to review newest to oldest.
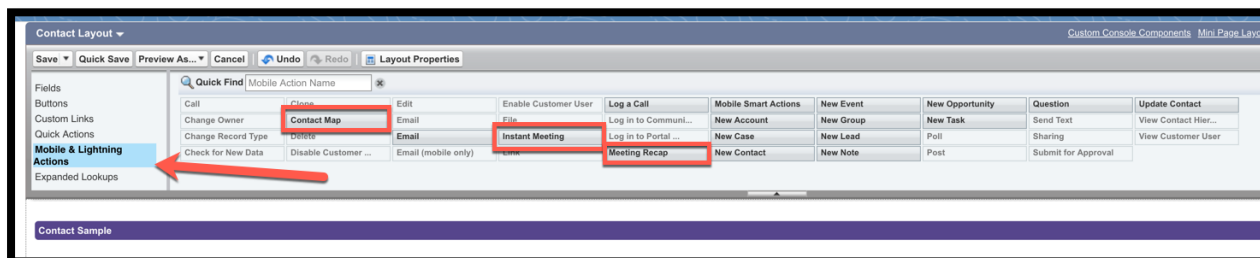
Figure 62

9. Drag to Salesforce Mobile and Lightning Experience Actions (figure 63).
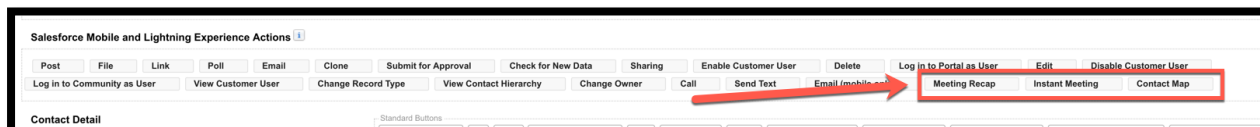
Figure 63

10. Click Related Lists add the following (figure 64):

- **Meeting Attendee** – displays meetings this contact has attended in related to Accounts or Opportunities.
- **Meetings** – displays all meetings linked to Contact (one-on-one). Users can also click New to plan and schedule meetings in the future or edit meetings.
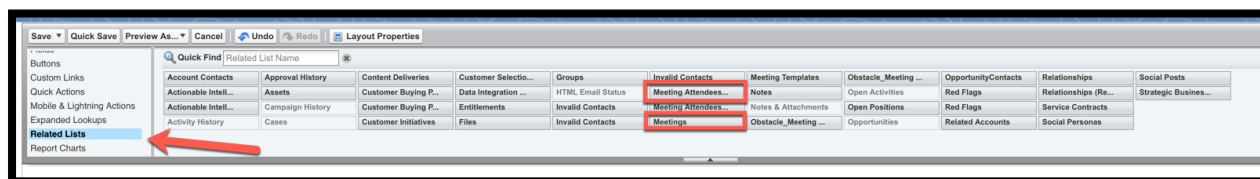
Figure 64

11. Drag Meetings to anywhere in the related list section (figure 65).
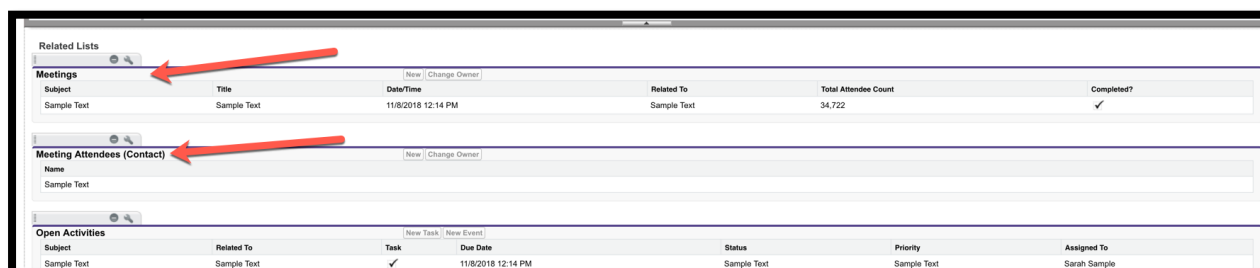
Figure 65

12. Click Save (figure 66).
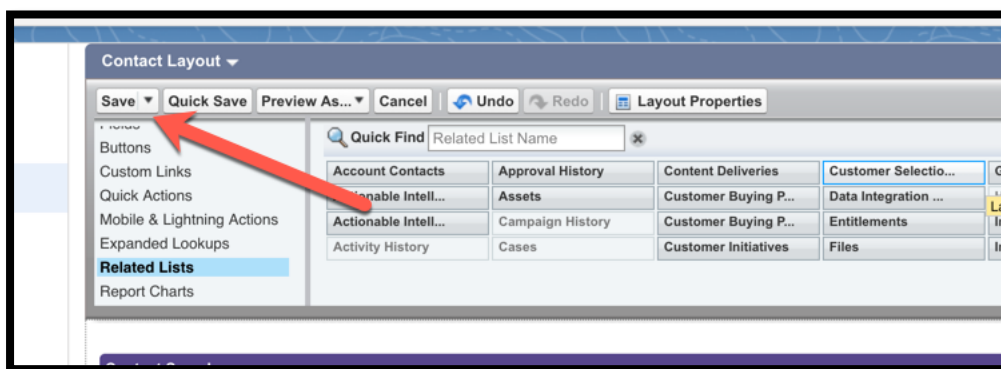
Figure 66

13. Click Yes to save the modifications (figure 67).
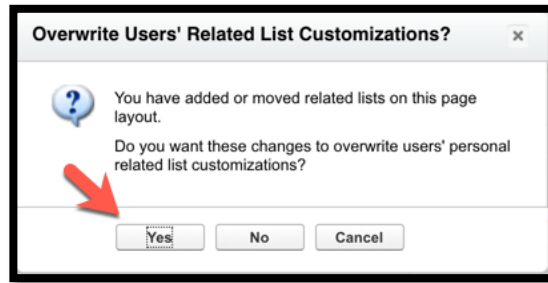
Figure 67

Enabling Picklist Values

NOTE: Organizations using Salesforce Professional Edition, may encounter the following error when attempting to access Picklist values. This is because of an API used by Strategy Mapper is not included in Professional edition. Please go to next section for the "work around" to configure the Picklist values. To edit Picklist Values in Professional Edition see Appendix A*.*

"Web service callout failed: WebService returned a SOAP Fault: API_DISABLED_FOR_ORG: API is not enabled for this Organization or Partner faultcode=sf:API_DISABLED_FOR_ORG faultactor= Error is in expression '{!init}' in page meetingmapper:addpicklistvalues: (MeetingMapper)"

1. Launch App Launcher by clicking on the nine dots (figure 68).
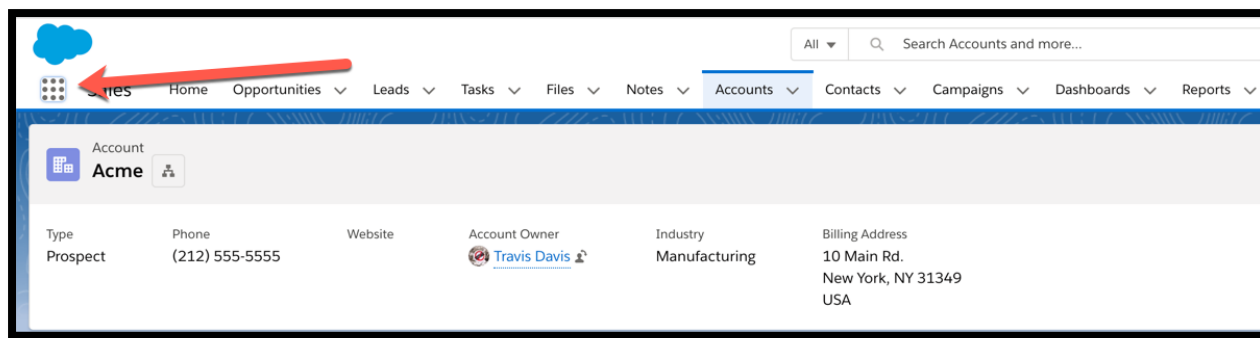
Figure 68

2. Click on Add Picklist Values (figure 69).
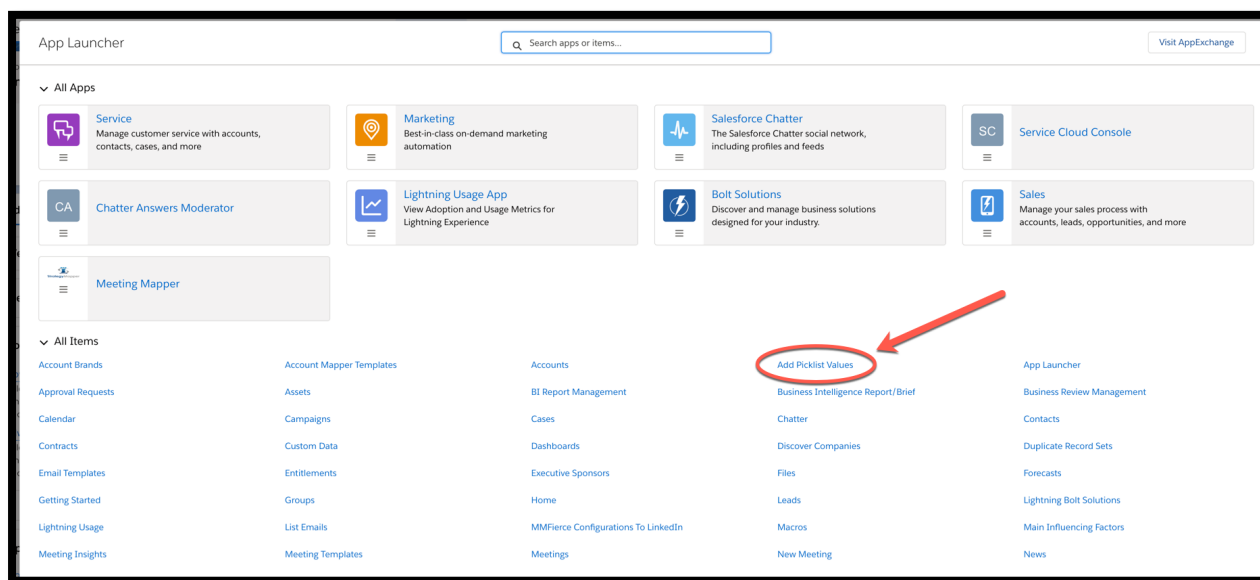
Figure 69

In the event you get this error please complete the following steps (figure 70).
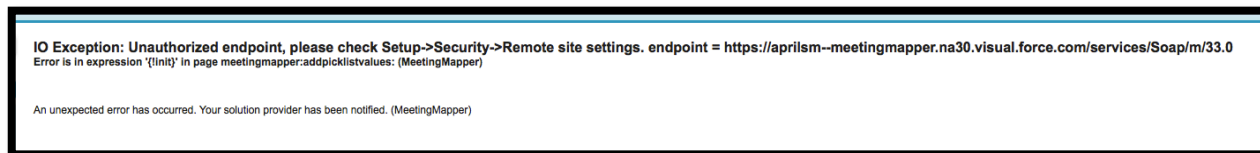
Figure 70

3. Copy the text highlighted in blue (figure 71).
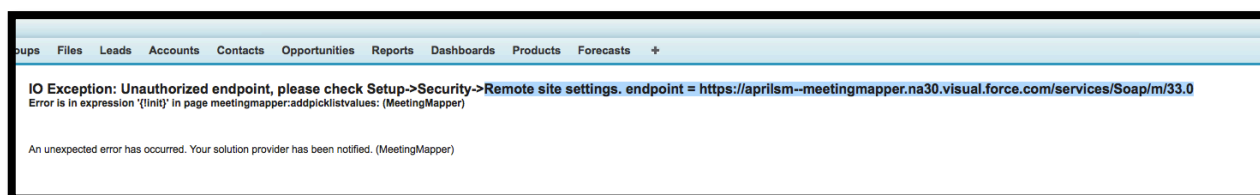
Figure 71

4. Click on Setup, search for remote site, click on Remote Site Settings (figure 72 &73).
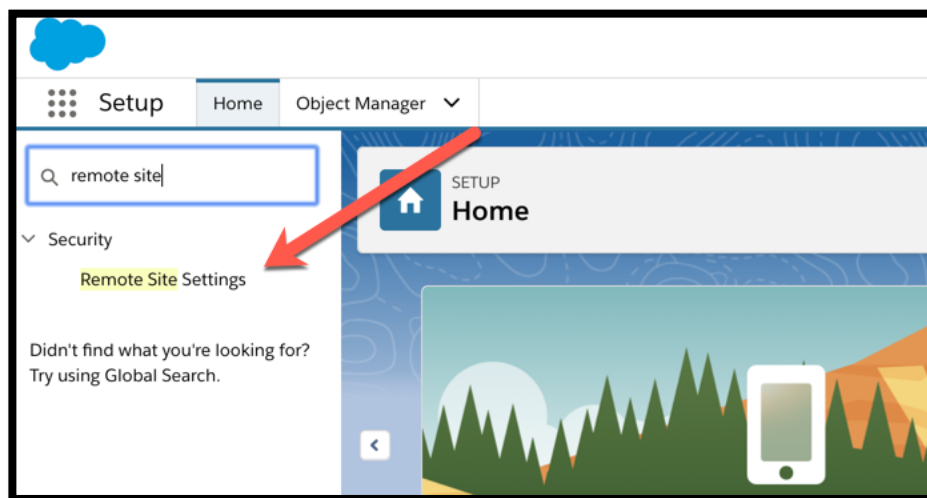
Figure 72
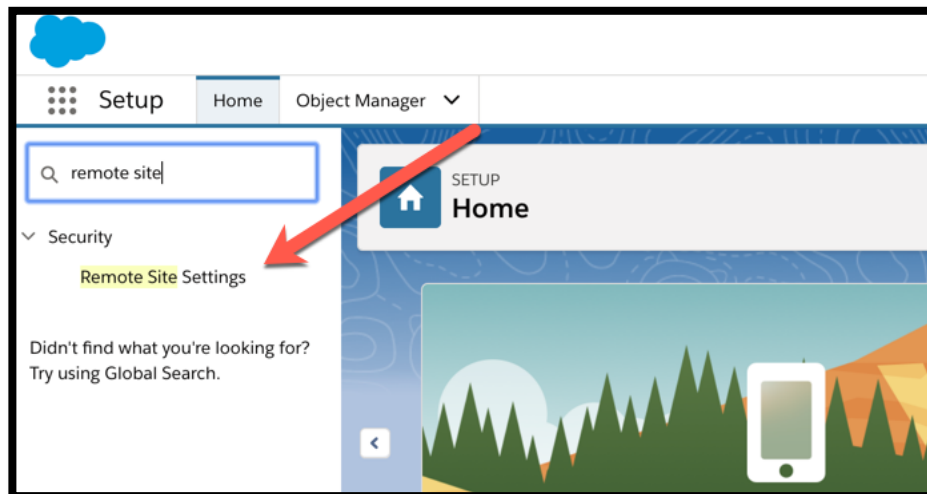
Figure 73

5. Click New Remote Site (figure 74)
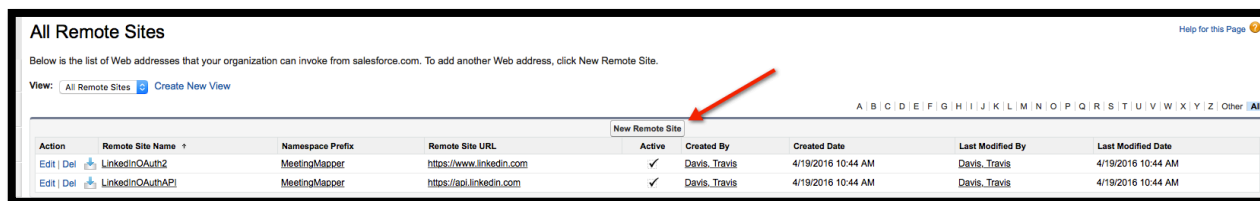
Figure 74

6. Enter in the following information (figure 75).

- Remote Site Name
- Paste the URL string into Remote Site URL
- Add a Description
- Click Save.

Figure 75

7. Click on Add Picklist Values in the App Launcher (figure 76 & 77) to verify usability.
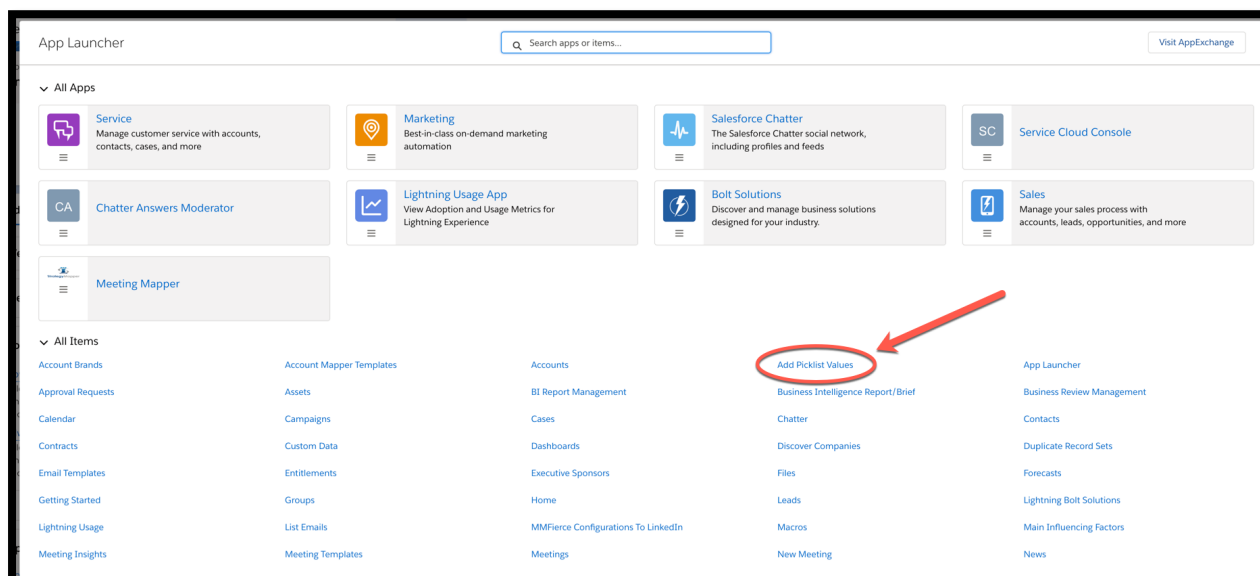
Figure 76

Figure 77

Configuring Opportunity Mapper Template Page Layout

1. In setup, click on Object Manager and search Opportunity Mapper, select Opportunity Mapper Templates (figure 78).
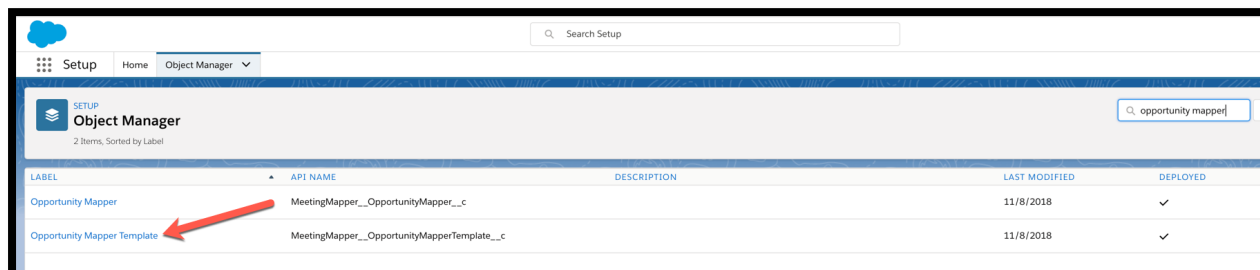
Figure 78

2. Select Page Layouts, click on Opportunity Mapper Template Layout (figure 79).
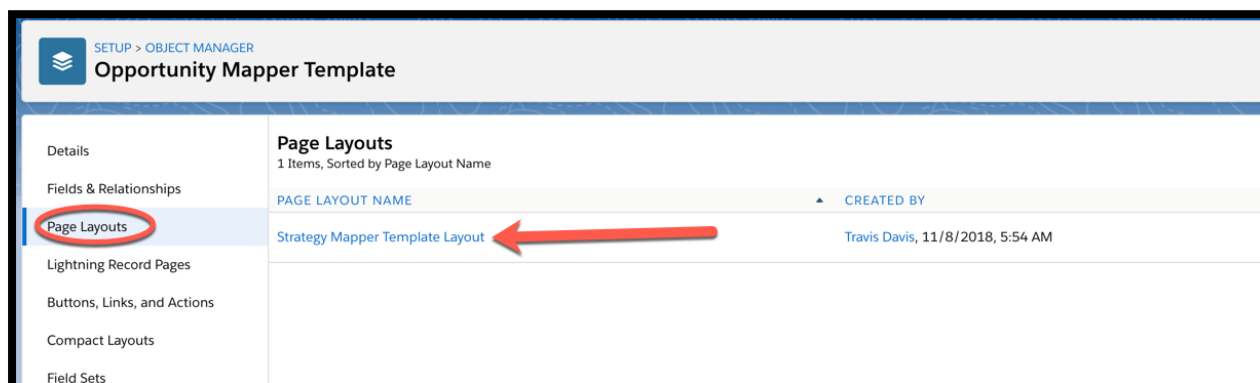
Figure 79

3. Select Fields, select Opportunity Milestones, Org Map Tab (figure 80).

Figure 80

4. Place them in section named Tabs (figure 81).

Figure 81

5. Click Save (figure 86).

Configuring Meeting Mapper Templates Page Layout
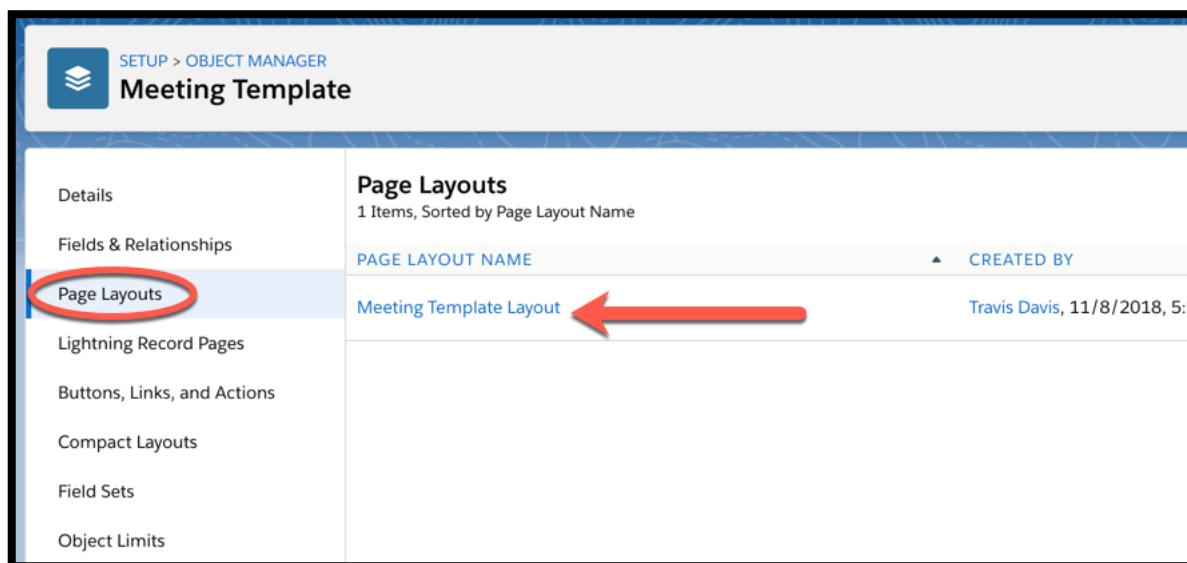
1. In setup, click on Object Manager and search Meeting, select Meeting Templates (figure 82).

Figure 82

2. Select Page Layouts, click on Meeting Template Layout (figure 83).

Figure 83

3. Under Meeting Template Details in the Information section, remove Objective 1 – 5 (figure 84).
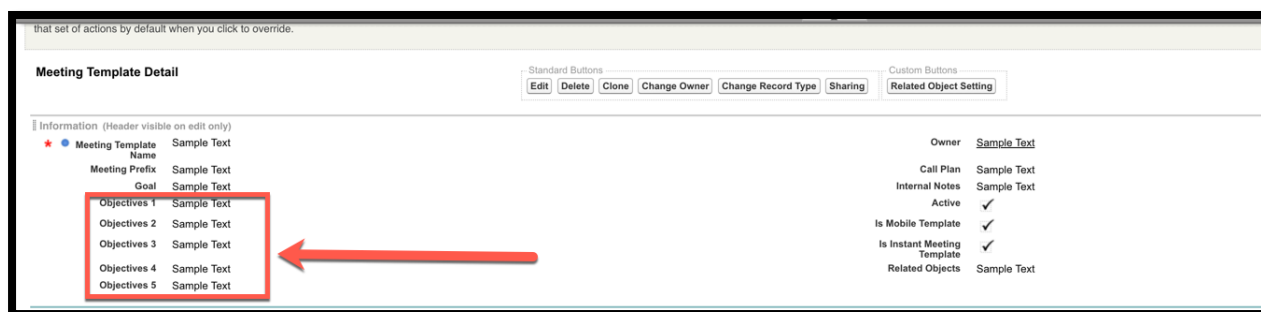
Figure 84

4. Click Mobile & Lightning Actions, click on 'override the global publisher layout (figure 85).
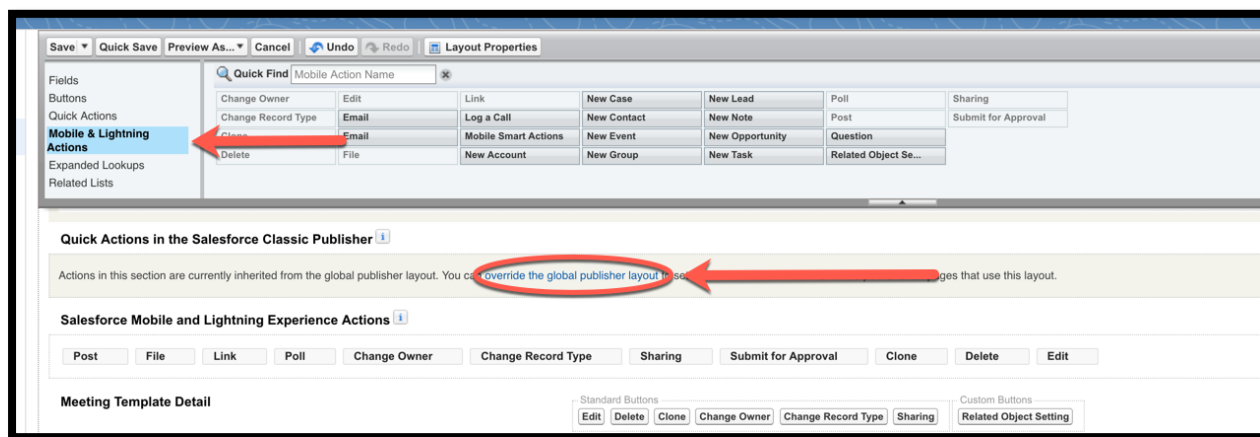
Figure 85

5. Select Related Object Settings (figure 86).

Figure 86

6. Place them in the Salesforce Mobile and Lightning Publisher (figure 87).
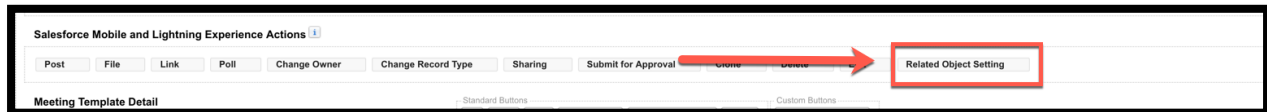
Figure 87

7. Select Related List, select Follow Up (figure 88).
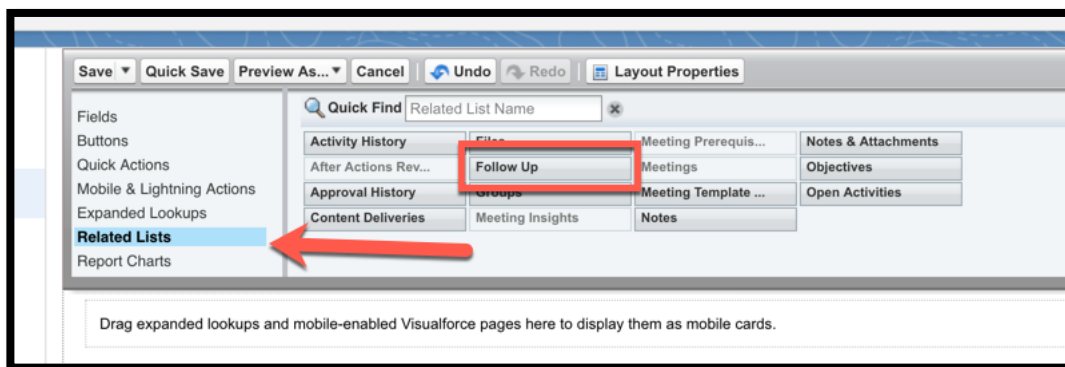
Figure 88

8. Place between Meeting Prerequisites and After Actions Reviews (figure 89).
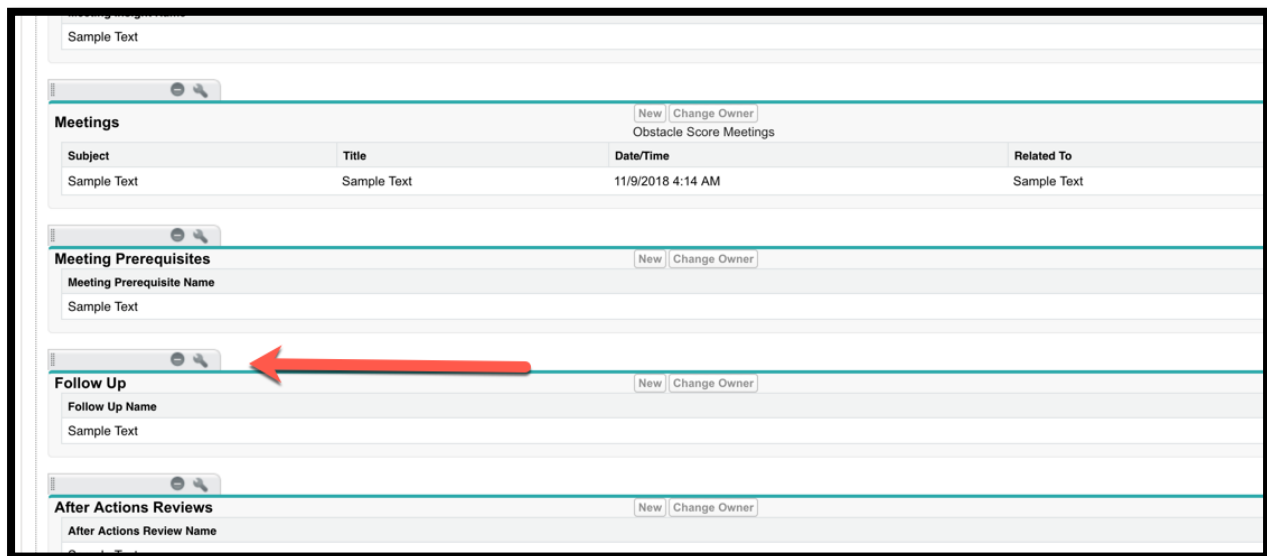
Figure 89

9. Click Save (figure 90).
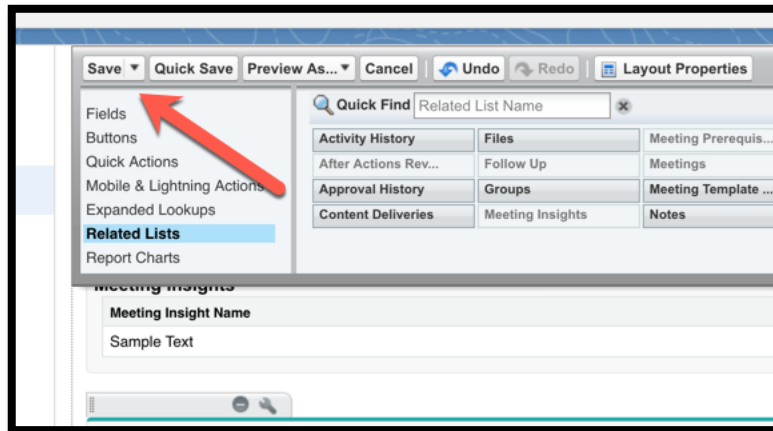
Figure 90

10. Click Yes (figure 91).
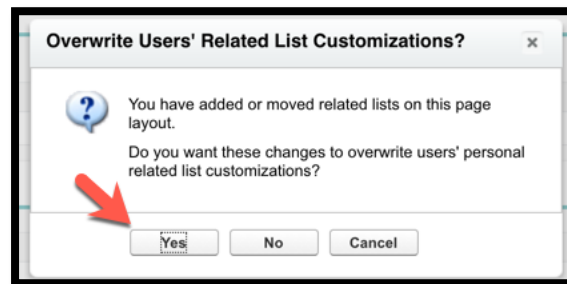
Figure 91

Configuring the Meeting Prerequisite Page Layout

1. In setup, click on Object Manager and search Pre, select Meeting Prerequisite (figure 92).
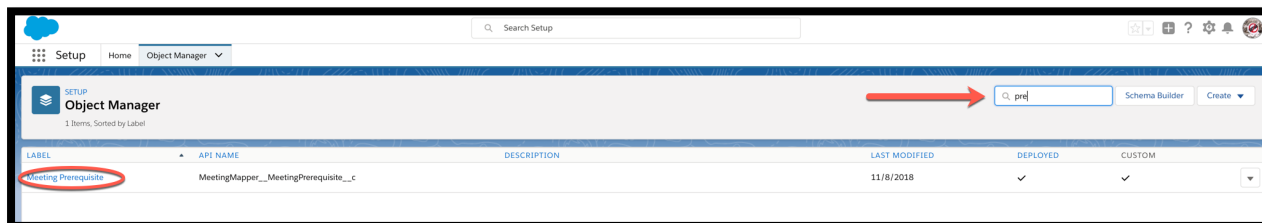
Figure 92

2. Select Page Layouts, click on Meeting Template Layout (figure 93).
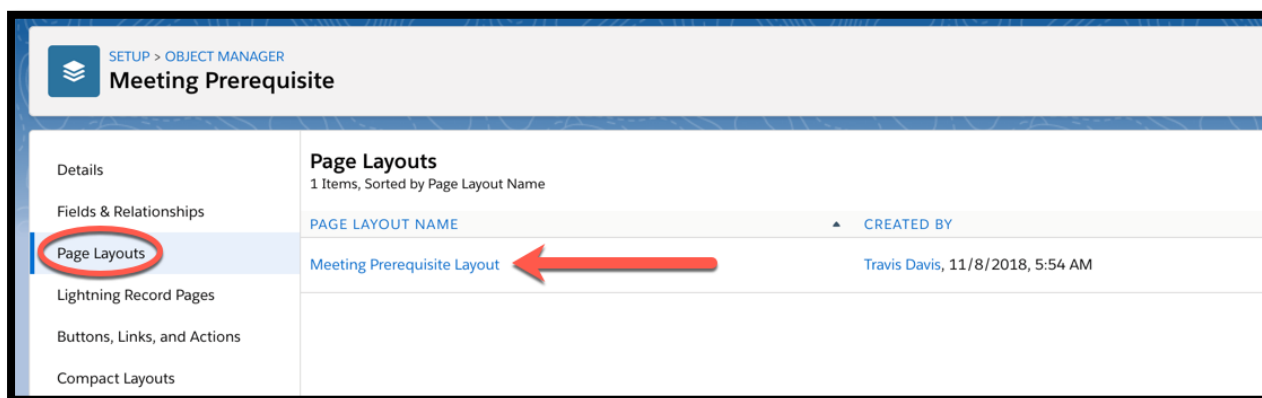
Figure 93

3. Click on Fields, remove Old Meeting Prerequisite Name (figure 94).
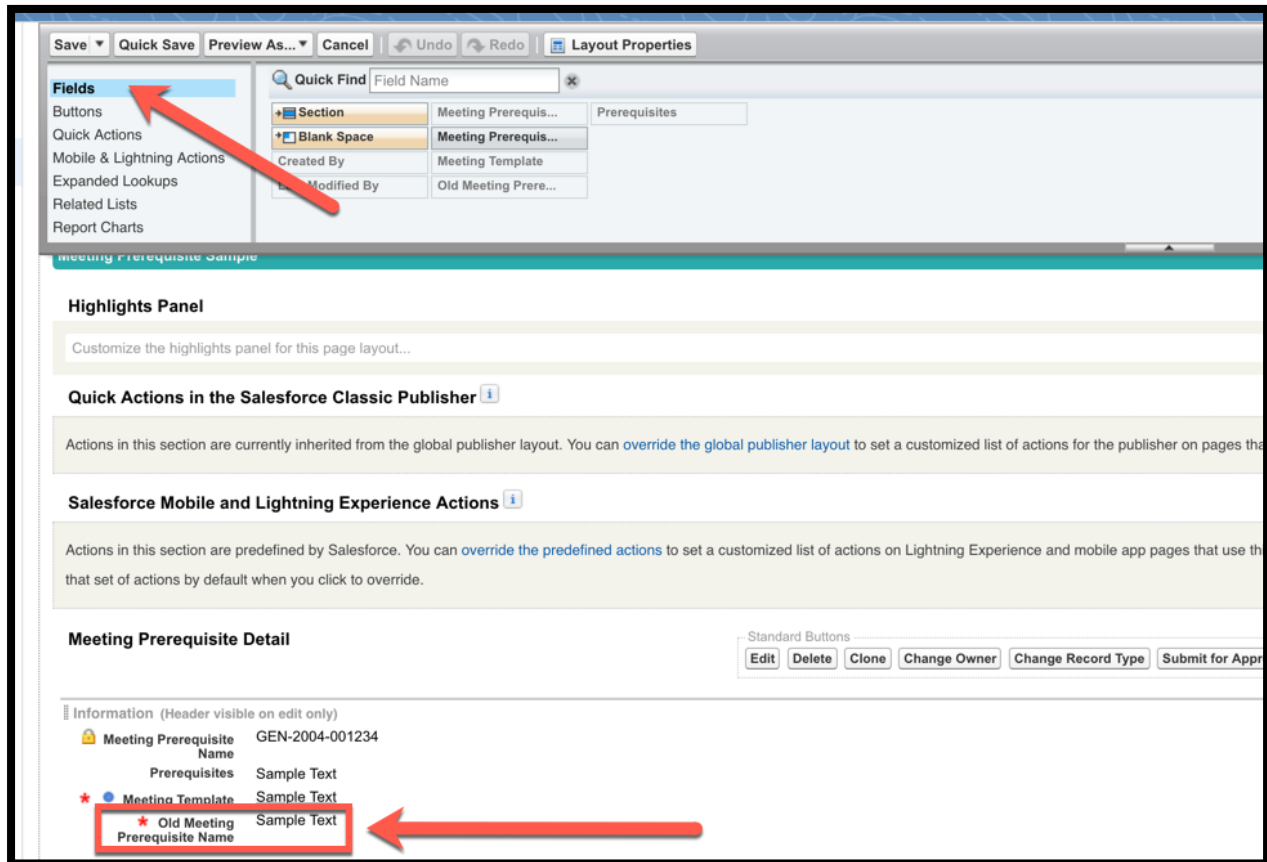
Figure 94

4. Click Save (figure 95).
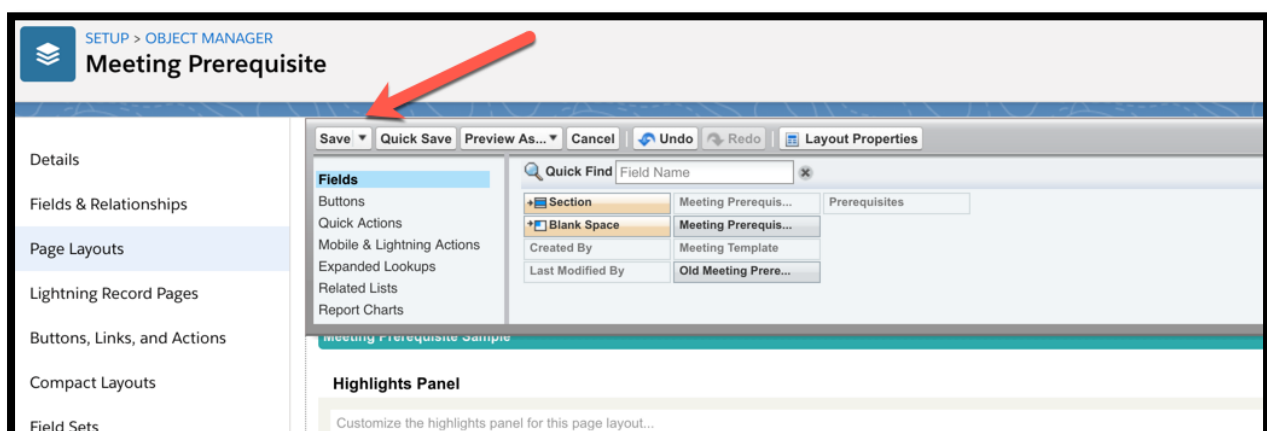
Figure 95

Configuring the Follow Up Page Layout

1. In setup, click on Object Manager and search Follow, select Follow Up (figure 96).
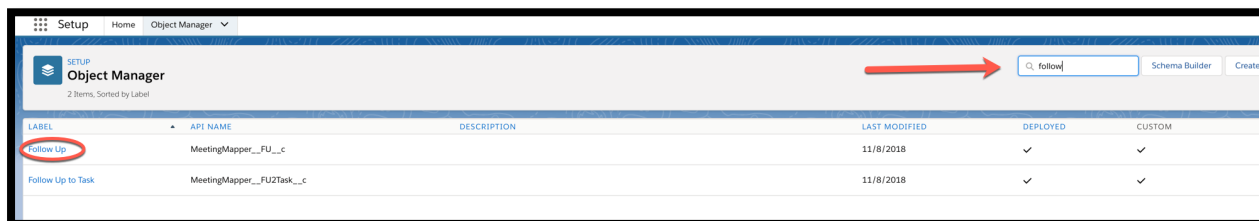
Figure 96

2. Select Page Layouts, click on Meeting Template Layout (figure 97).
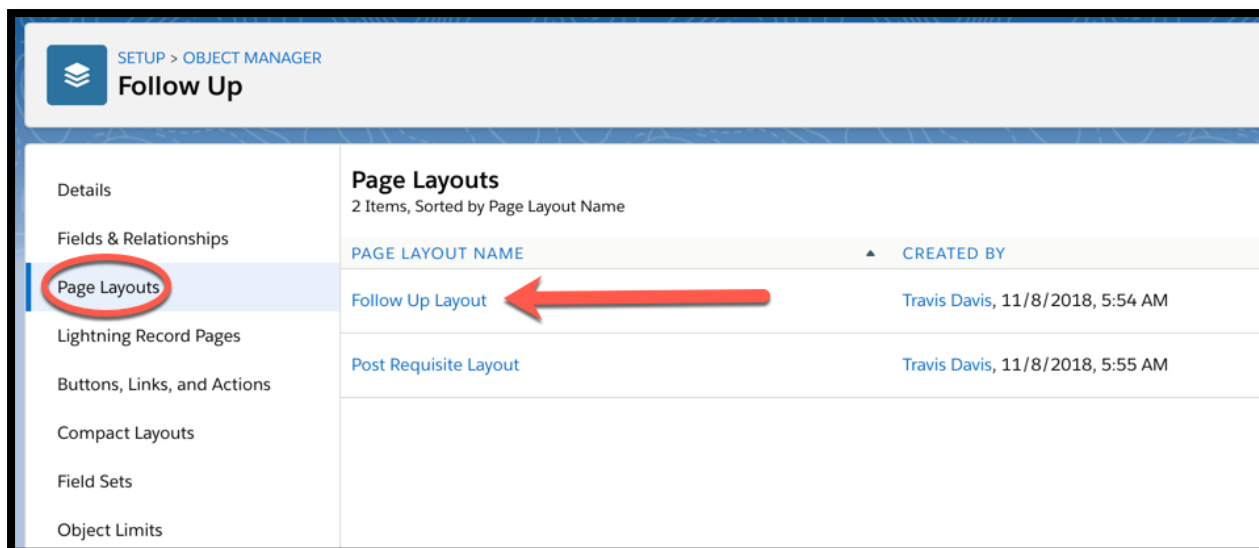
Figure 97

3. Click on Fields, select the following (figure 98):

    • **Details** – details regarding the Follow Up
    • **Follow Up** – title/subject of the Follow Up
    • **How Long** – how long after the meeting to complete the Follow Up
    • **How Long Type** – Day, Week, etc..
    • **Send Mail** – send an email to remind the user
    • **Sequence**- if there is more than one Follow Up
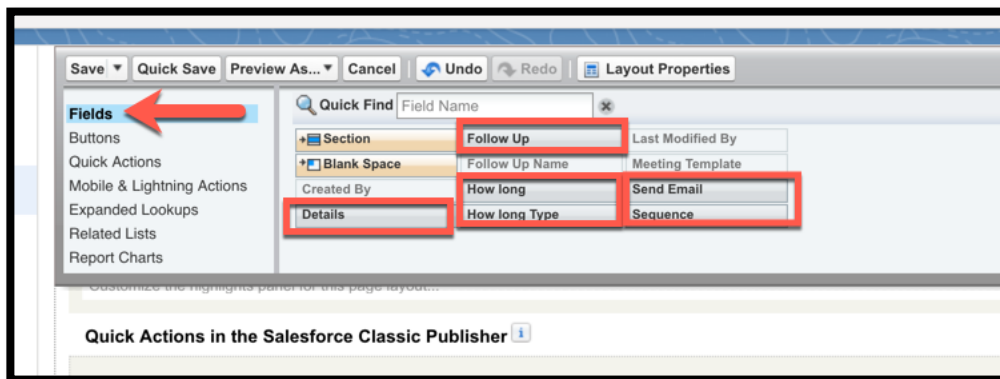
Figure 98

4. Move the fields to the Information section (figure 99).

    NOTE: Place the fields in the same order as in these steps.
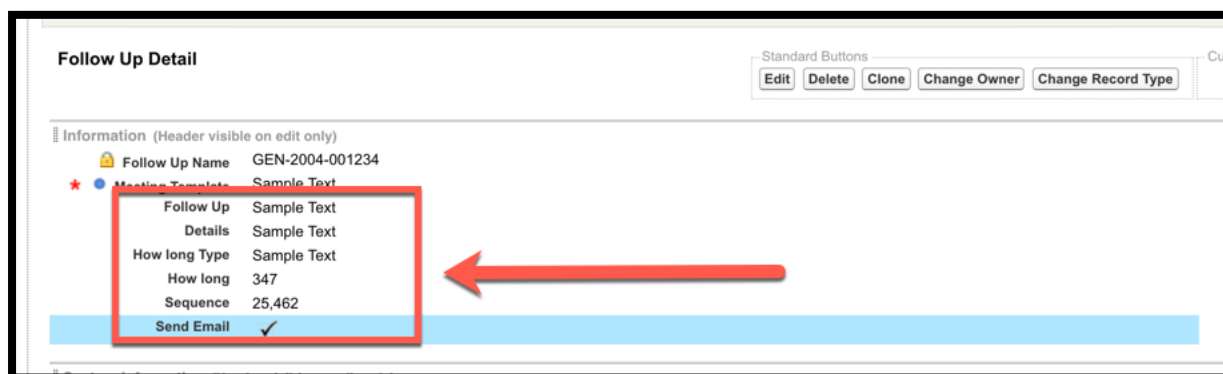
Figure 99

5. Click Save (figure 100).
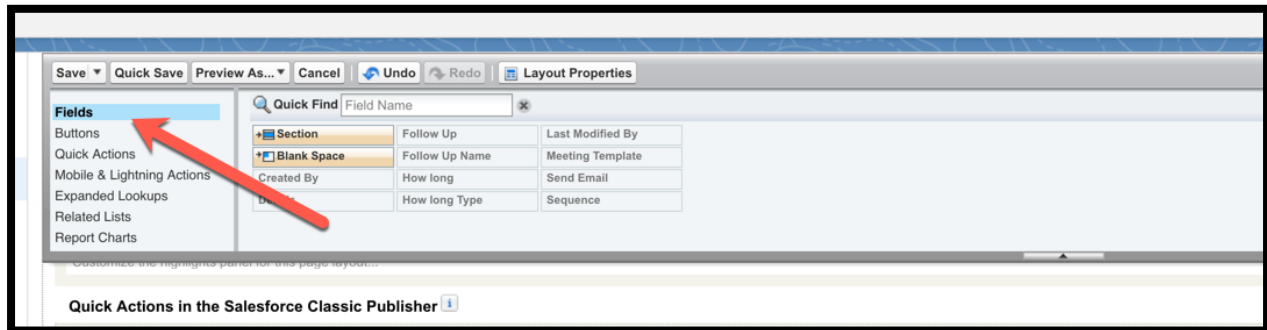
Figure 100

Configuring the Objective Page Layout

1. In setup, click on Object Manager and search Objective, select (figure 101).
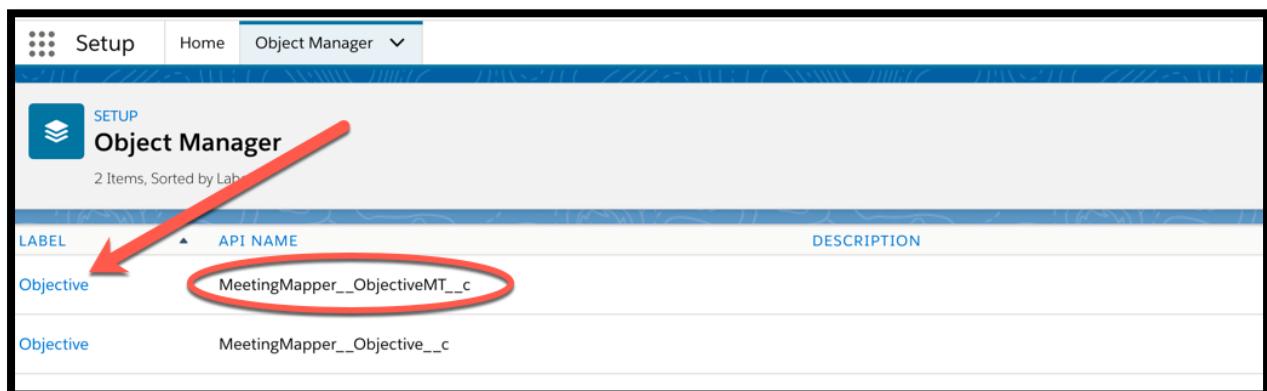
Figure 101

2. Select Page Layouts, click on Objective Layout (figure 102).
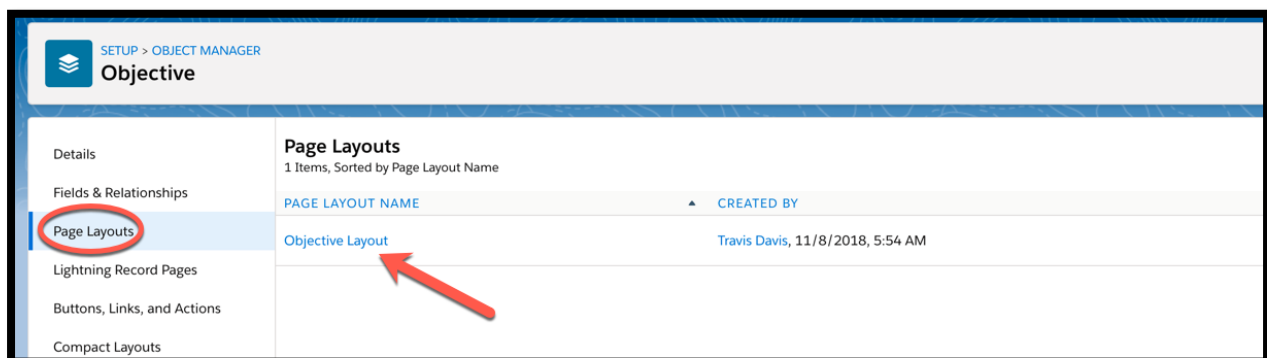
Figure 102

3. Click on Fields, select Objective (figure 103) and drag to Information in Objective Details section (figure 104).
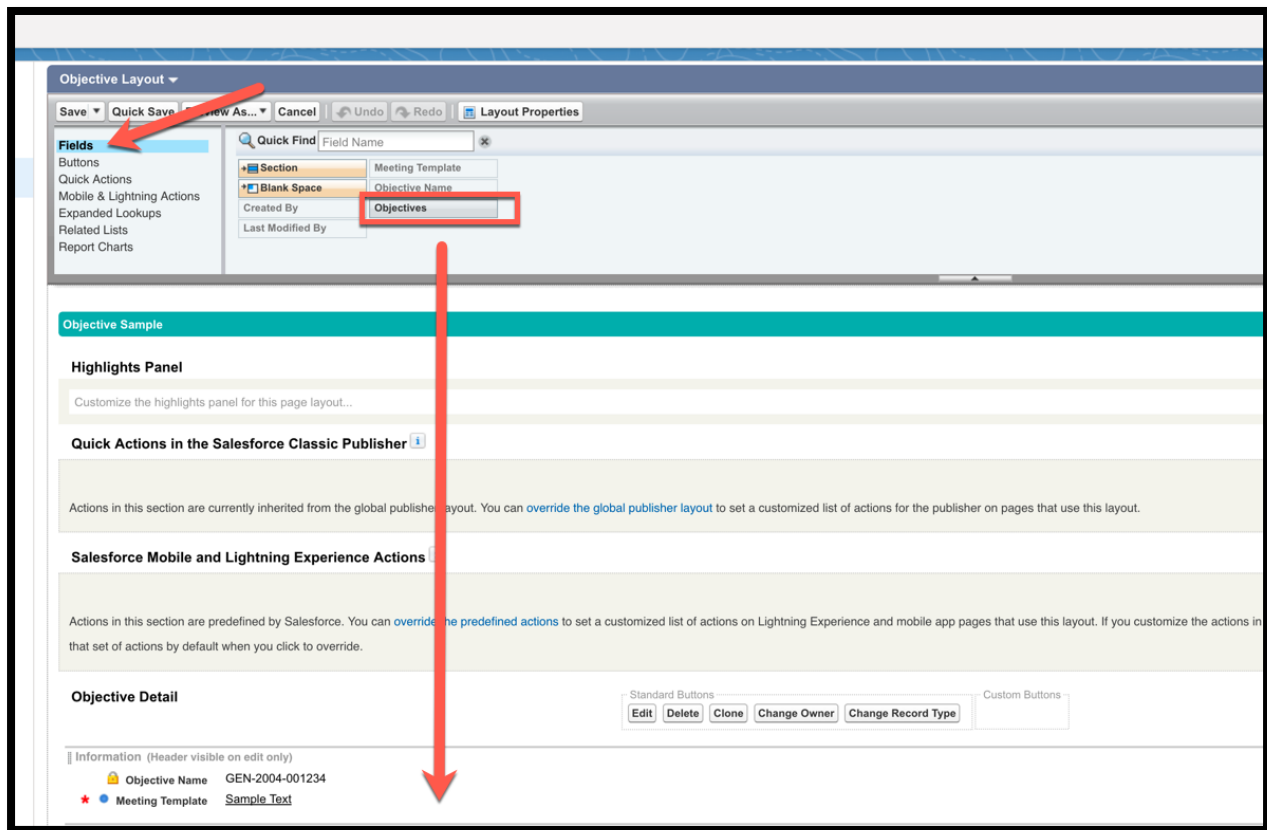
Figure 103

4. Click Save (figure 104).
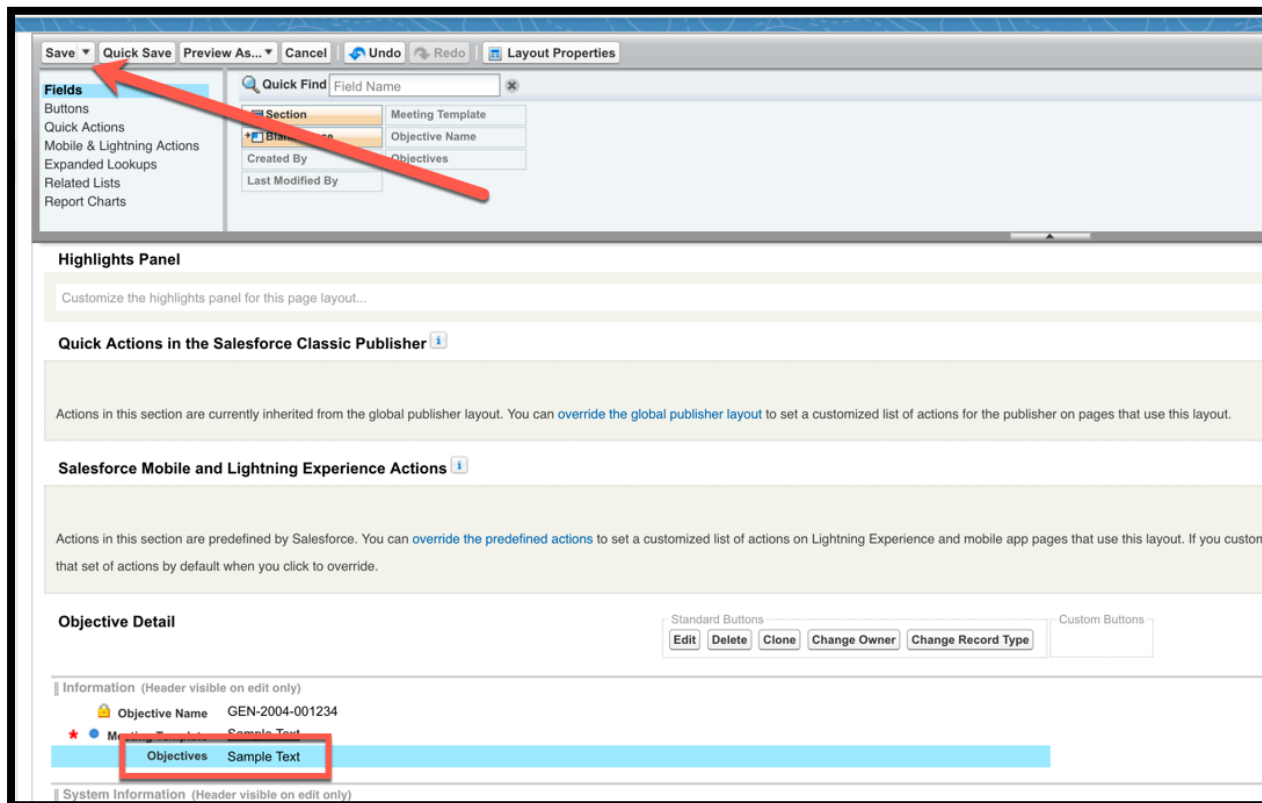
Figure 104

Add Quota to User Object

Strategy Mapper allows you to assign quota values to users. These values are used to track attainment for the QT and FY.

1. In Setup -> Object Manager, search User, click User (figure 105).
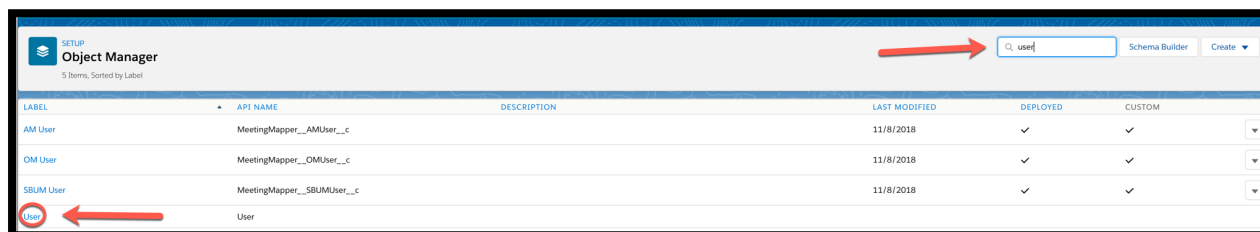
Figure 105

2. Click on User Page Layouts, click on User Layout (figure 106).
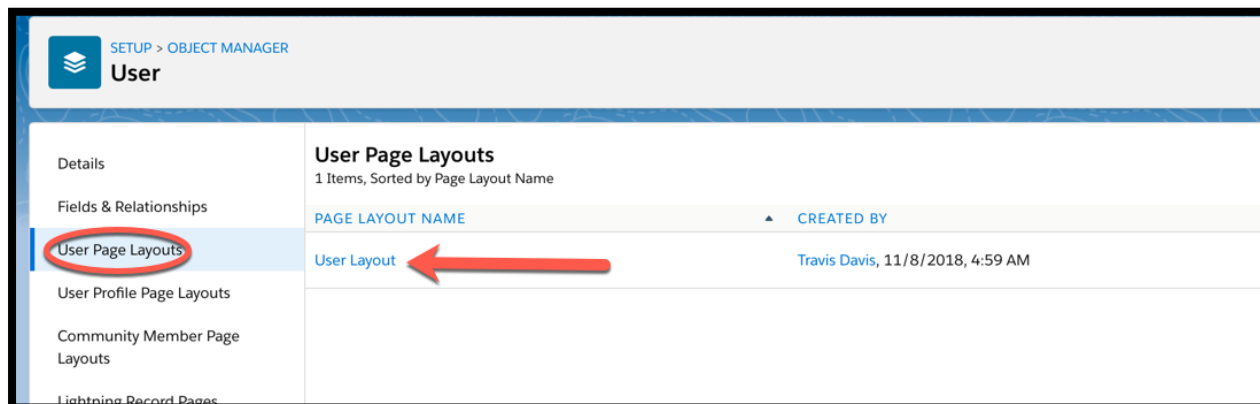
Figure 106

3. In Fields, select (figure 107) and drag to User Detail -> Additional Information (figure 108).

- Current FY Quota
- Current Q1 Quota
- Current Q2 Quota
- Current Q3 Quota
- Current Q4 Quota
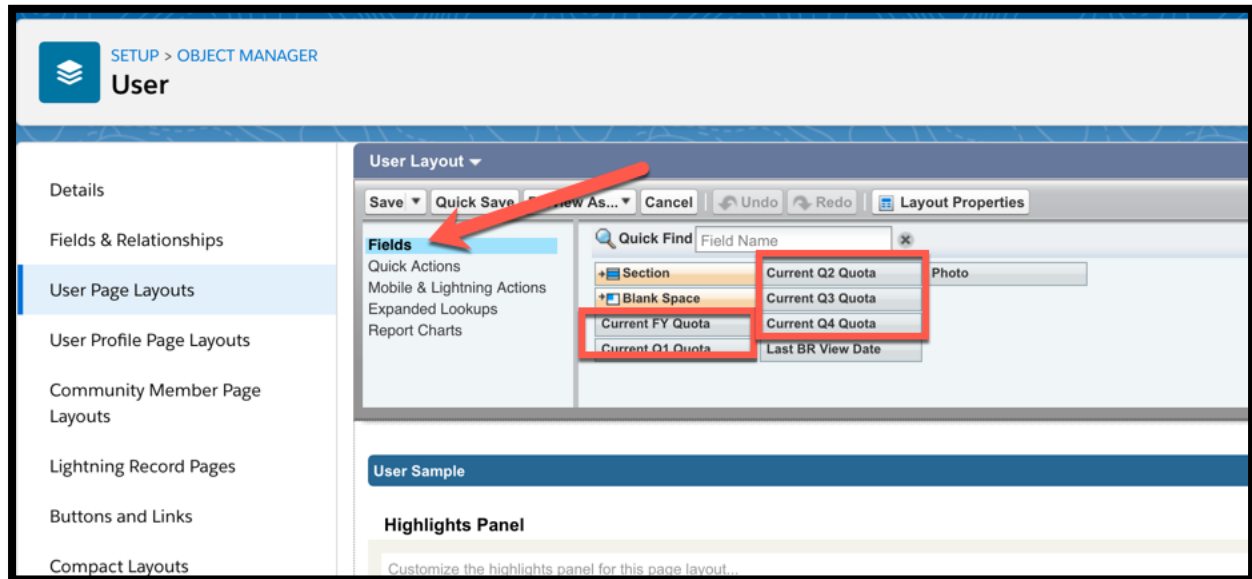
Figure 107
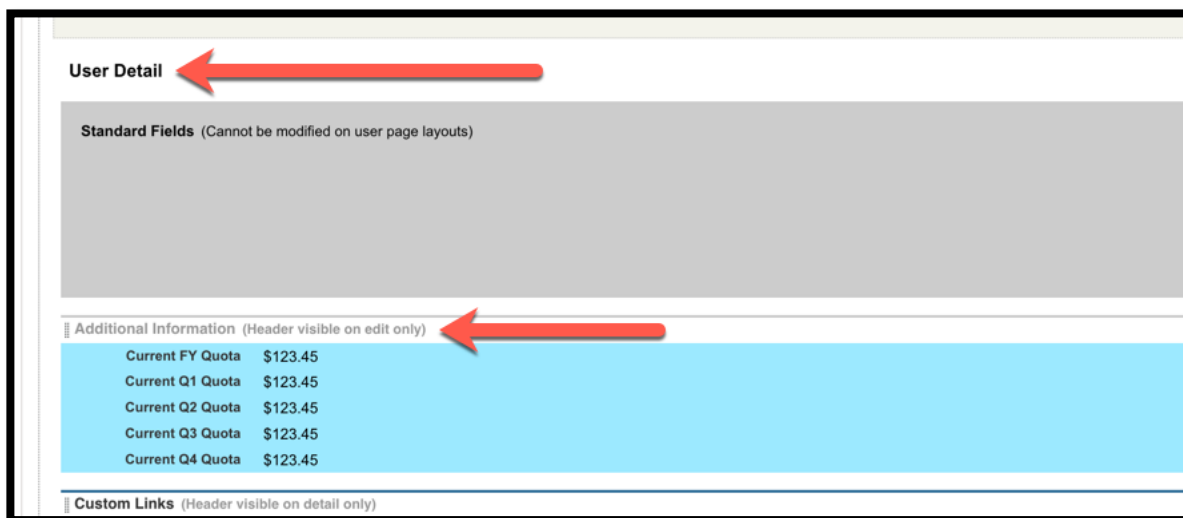
Figure 108

4. Click Save (figure 109).
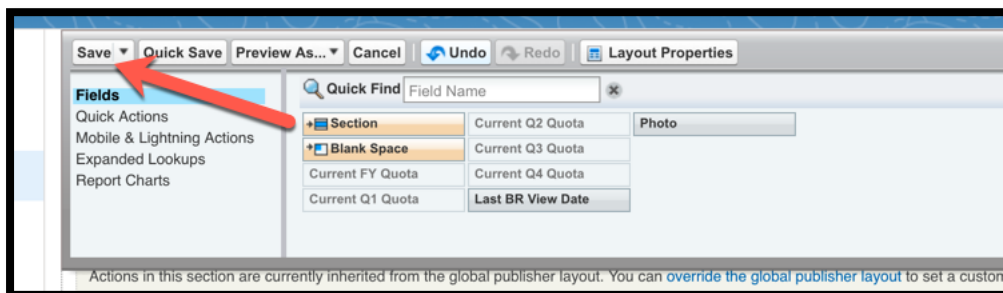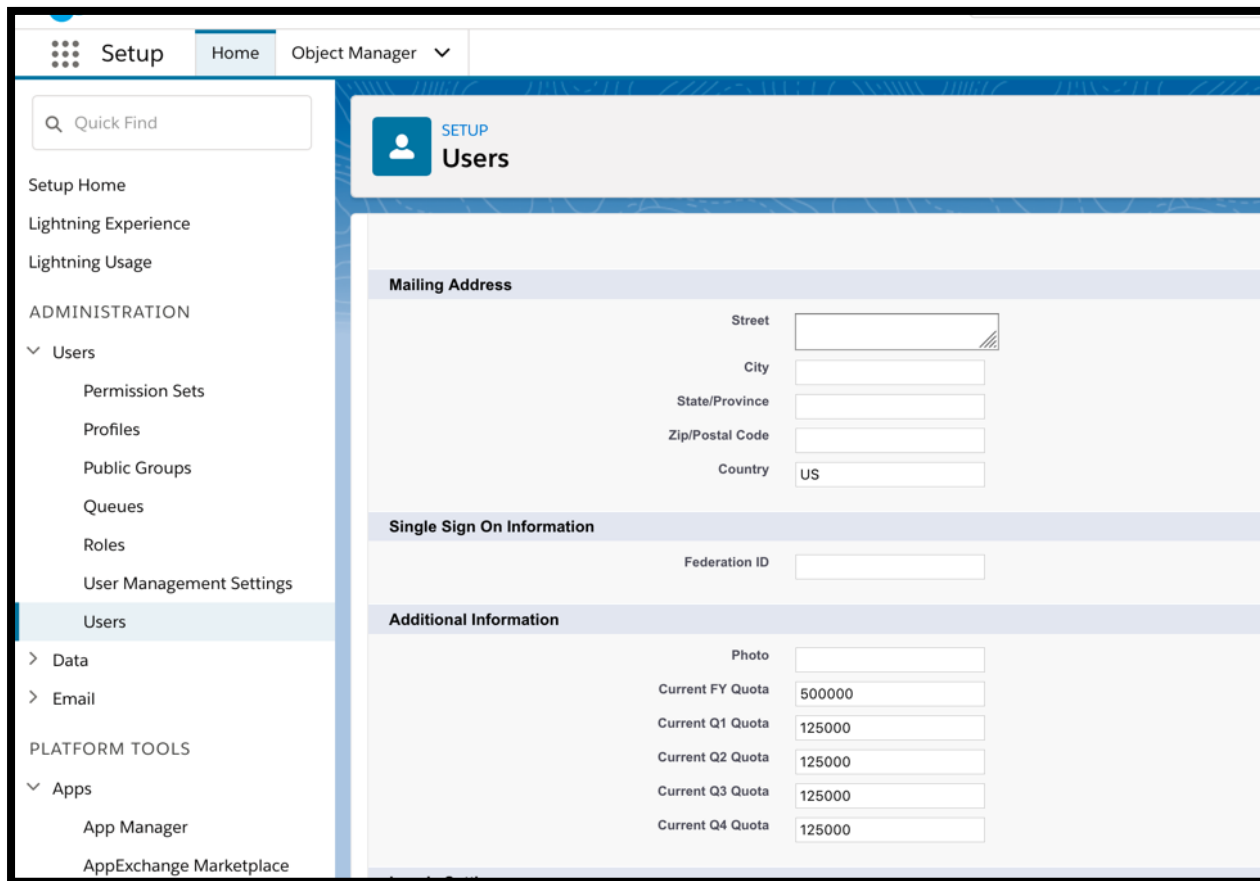
Figure 109

You can now edit the users and enter in their quota for Current FY and Current QTs (figure 110).

Figure 110

Creating Main Influencing Factors

Edit Main Influencing Factors (Lightning Only)

1. In Setup -> Object Manager, search on Main (figure 111). Click on Main Influencing Factor.

Figure 111

2. Select Page Layouts -> click on Main Influencing Factors Layout (figure 112).
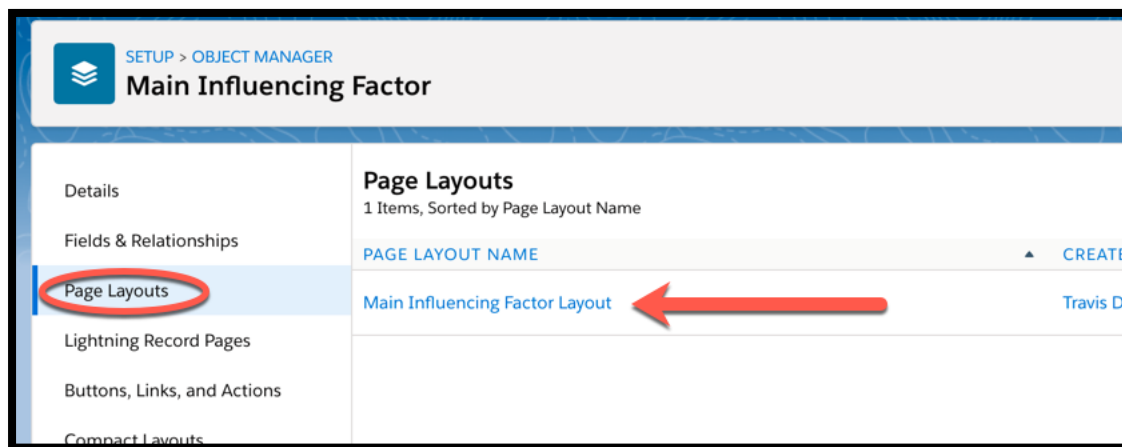
Figure 112

3. Select Related List -> Select Notes & Attachments and Drag to Related List (figure 113). Click Save (figure 114).
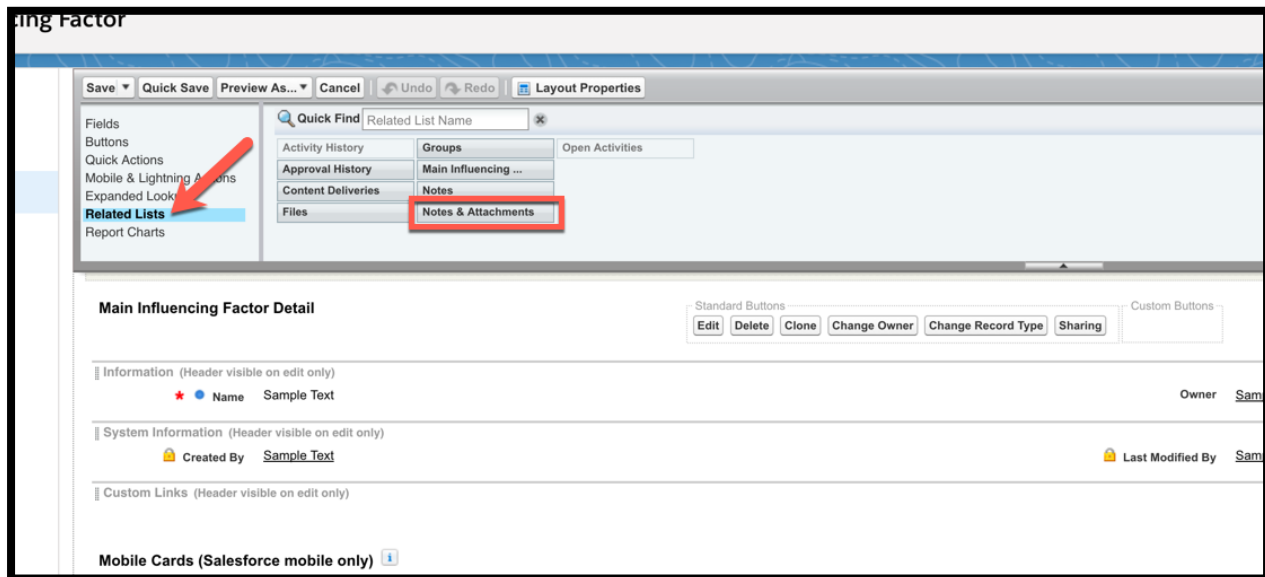
Figure 113
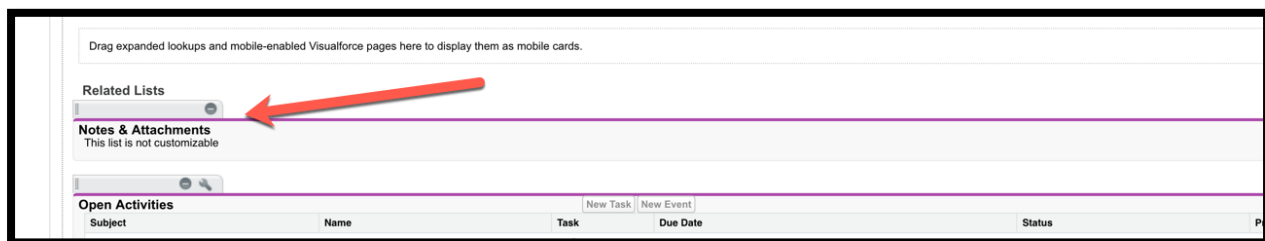
Figure 114

4. Click Save (figure 115).
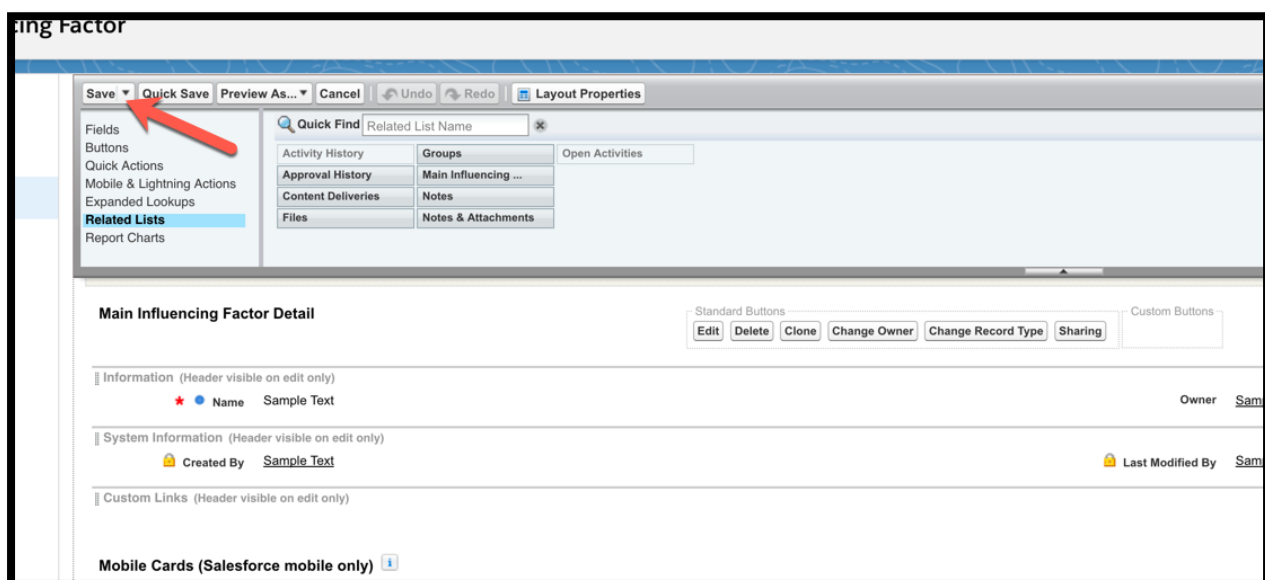
Figure 115

5. Click Yes to save your changes (figure 116).
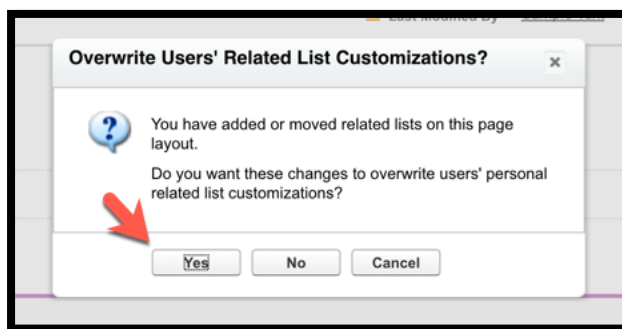
Figure 116

Create a New Main Influencing Factors

1. In App Launcher, click on Main Influencing Factors (figure 117).
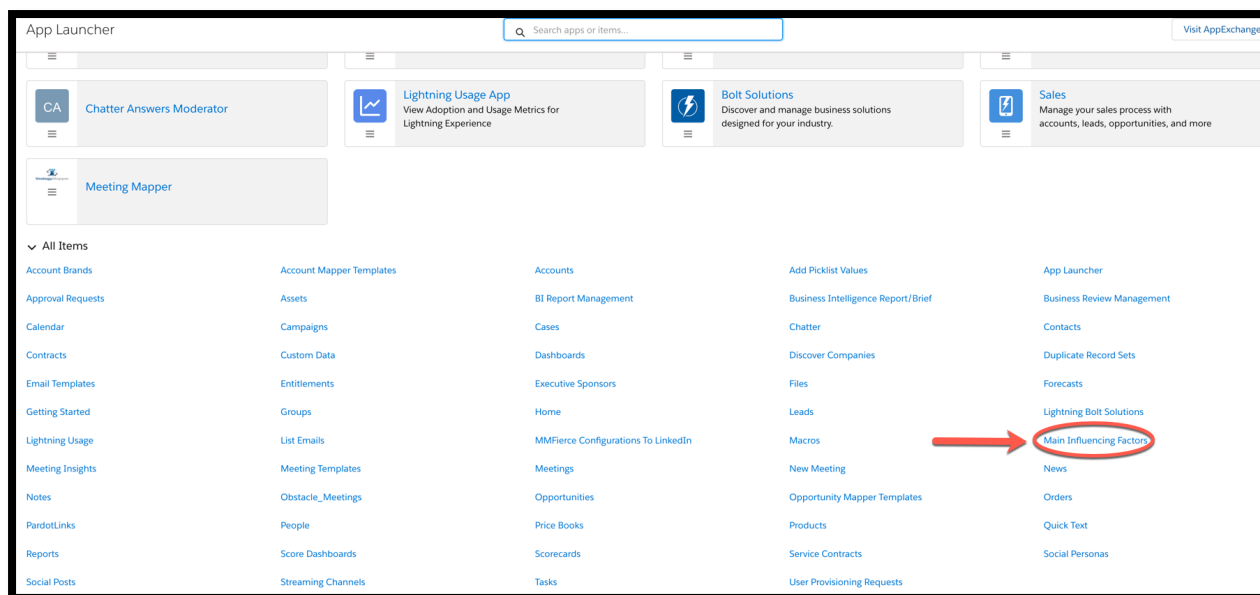
Figure 117

2. On the Main Influencing Factors page, click All from the dropdown. Click New (figure 118).
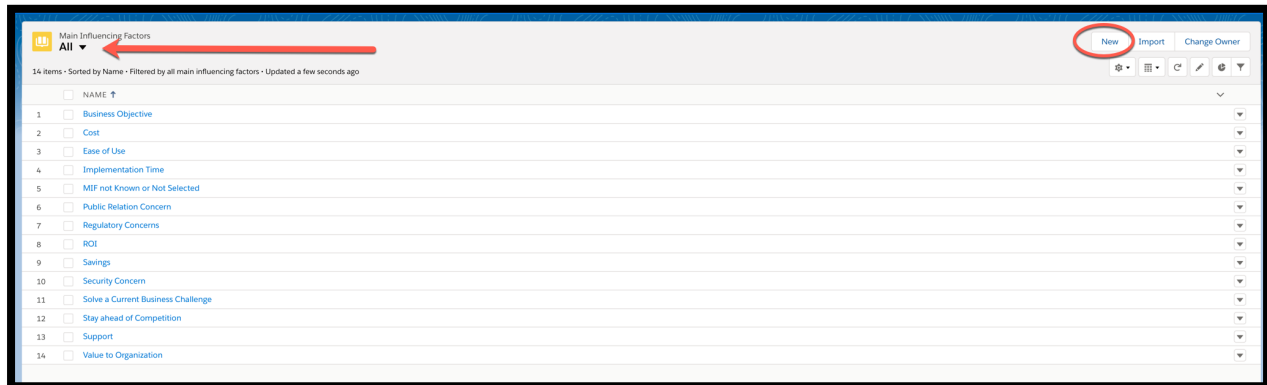
Figure 118

3. Enter in a Name for the Main Influencing Factor (figure 119), click Save.
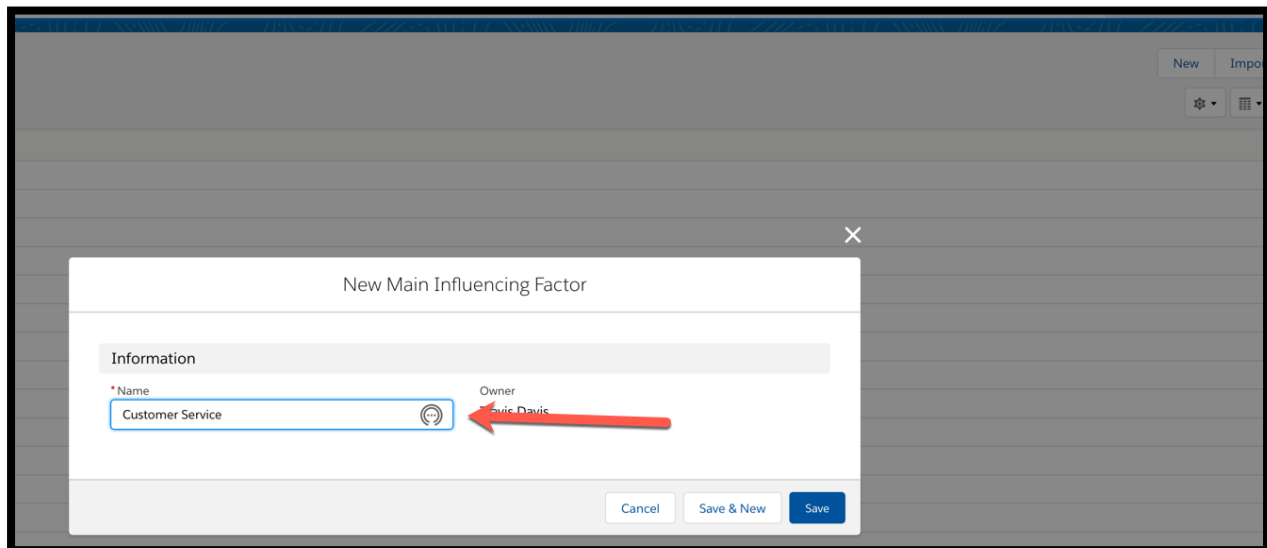
Figure 119

4. Click on Related -> Upload Files (figure 120).
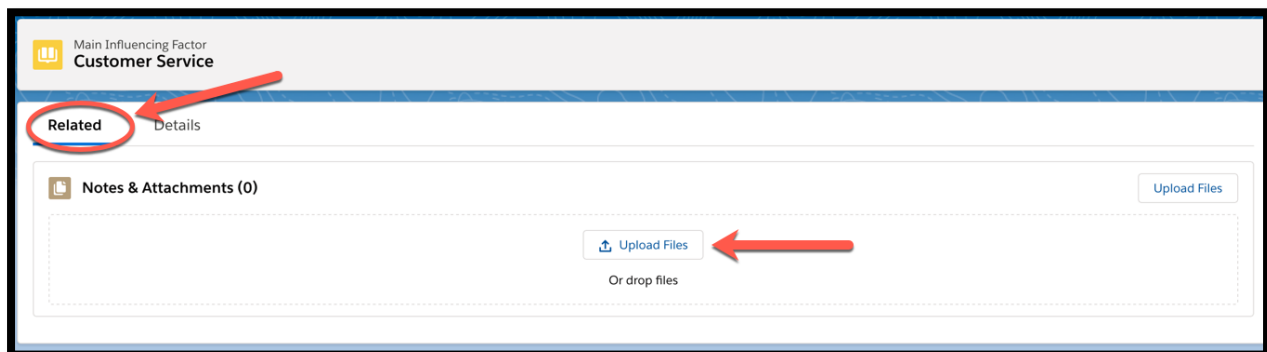
Figure 120

5. Select an icon (jpg or png file format) -> click Open (figure 121).

Figure 121

6. Click Done (figure 122).
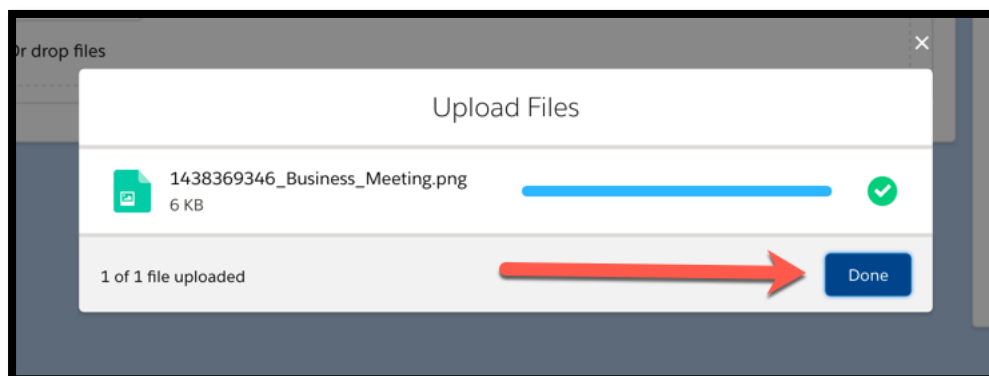
Figure 122

7. The new Influencing Factor has been added (figure 123).
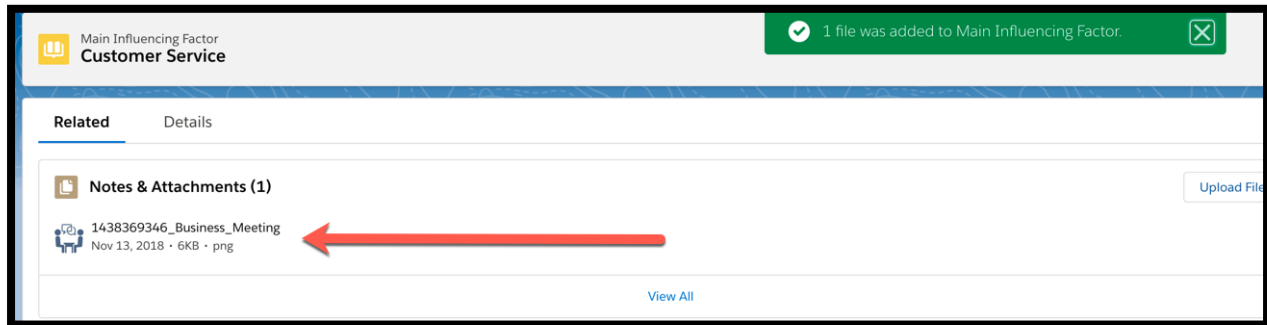
Figure 123

Hide Status Dropdown from Account Mapper

In this version Strategy Mapper status dropdown are no longer used:

- Account Milestones
- Customer Initiatives
- Objectives
- Red Flags

To remove them from the pages, complete the following:

NOTE: Using Classic mode to complete the steps.

1. In Setup, search Fields, in Accounts select Fields (figure 124).

Figure 124

2. Click on Status for MeetingMapper_CBPStatus_c (figure 126).

Figure 125

3. Click Field Level Security (figure 126).

Figure 126

4. Click in Visible to check all boxes (figure 126 & 127).

Figure 127

Figure 128

5. Click in Visible to remove all the check boxes (figure 129), click Save.

Figure 129

Complete the above steps for the following:

- MeetingMapper_CIStatus_c
- MeetingMapper_CadenceStatus_c
- MeetingMapper_ChallengeStatus_c

Hide Status Dropdown from Opportunity Mapper

In this version Strategy Mapper status dropdown are no longer used:

- Opportunity Milestones
- Opportunity Red Flags

To remove them from the pages, complete the following:

NOTE: Using Classic mode to complete the steps.

6. In Setup, search Fields, in Opportunities select Fields (figure 130).

Figure 130

7. Click on Status for MeetingMapper_CBPStatus_c (figure 132).

Figure 131

8. Click Field Level Security (figure 133).

Figure 132

9. Click in Visible to check all boxes (figure 134 & 135).

Figure 133

Figure 134

10. Click in Visible to remove all the check boxes (figure 136), click Save.

Figure 135

Complete the above steps for the following:

- MeetingMapper_ChallengeStatus_c

Modify Departments

1. In Setup click on Object Manager -> enter contact in the search field, click on Contact (figure 136).
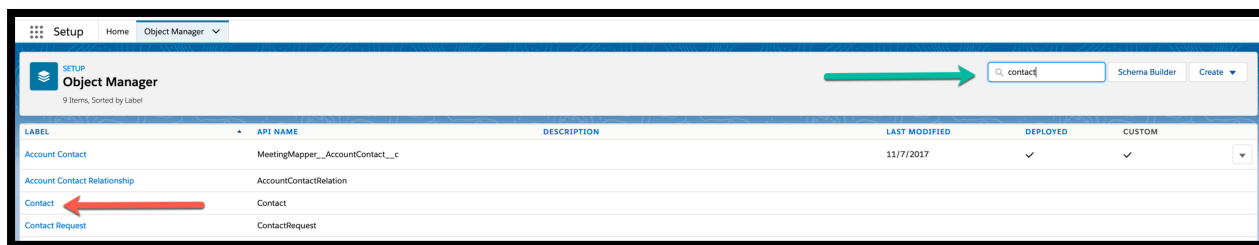
Figure 136

2. Click on Fields & Relationships -> select <u>Departments</u> not Department (figure 137).
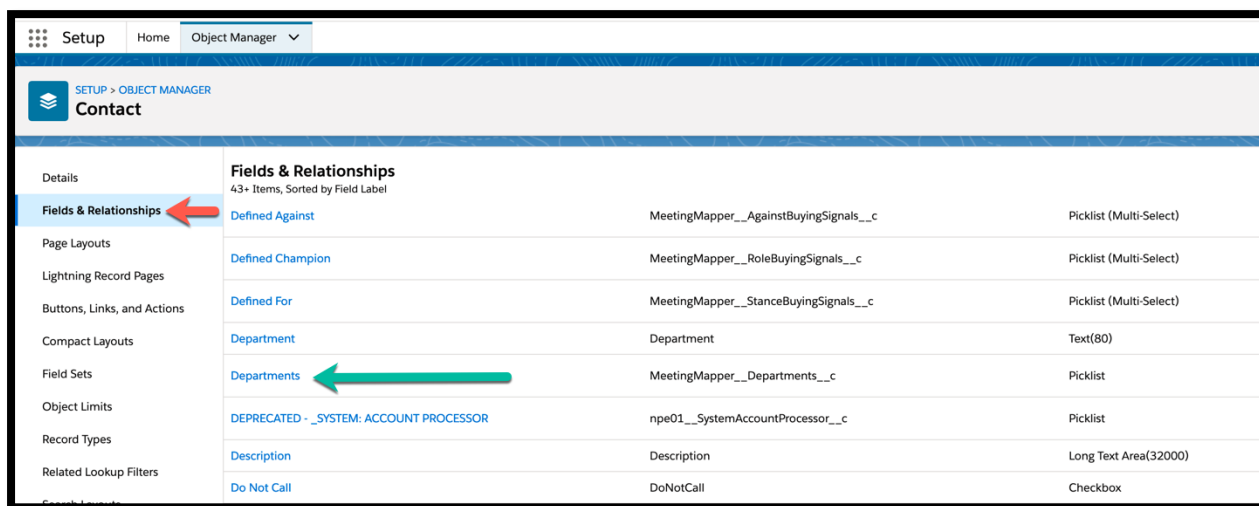
Figure 137

3. Select New (figure 138).
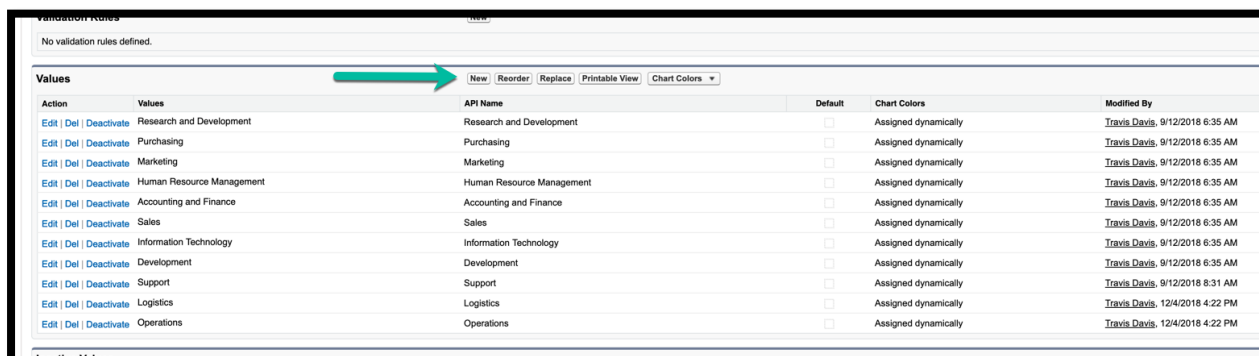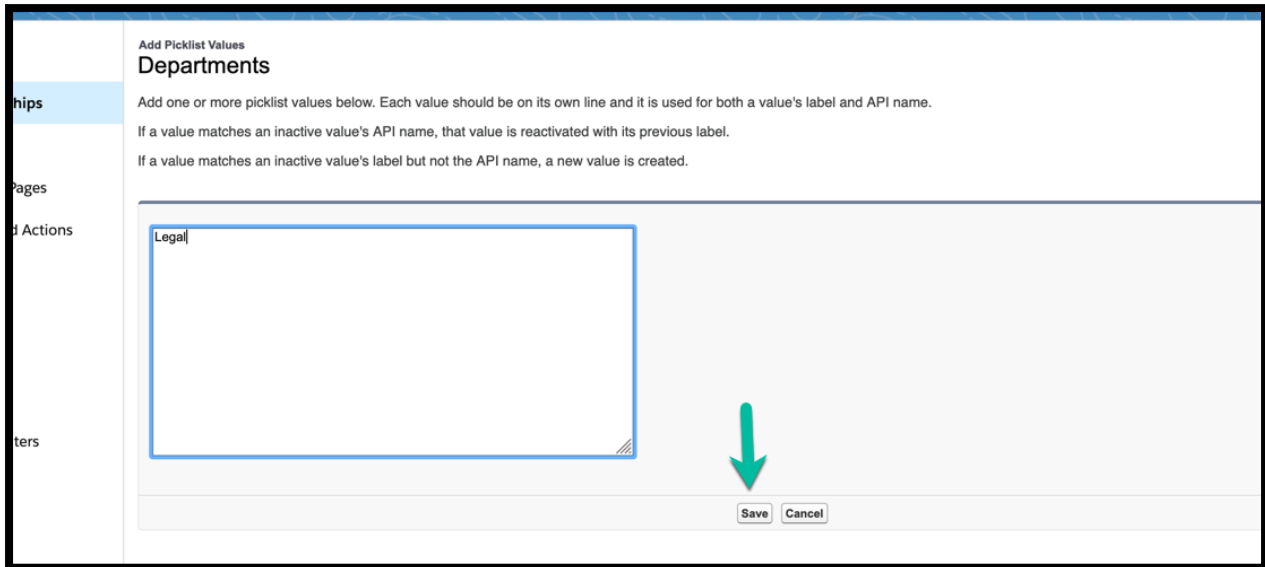
Figure 138

4. Enter in the new departments (to enter more than one at a time, type in the department and hit Enter) -> click on Save (figure 139). The new value will be displayed in the values (figure 140).

Figure 139

Figure 140