

The Complex Sale (TCS): GPS RADAR and GPS PROPHET for salesforce.com (sfdc)

Getting Started Guide for Administrators

In order for your users to gain access to the GPS Suite applications and to further configure your set-up please refer to the notes below regarding your GPS Admin tab in sfdc.

GPS Admin Tab

General

- The GPS Admin Tab is only visible to sfdc users with profile "Systems Administrator."
- The different options available under the GPS Admin tab are only available to see if the user is defined in "user maintenance" as "administrator".
- The sign in you supplied for set up is defined with both the required administrator's authority above and will be the only ID able to access and use the GPS Admin options until you have granted these rights to others.
- In the Professional edition of salesforce.com any custom fields that are added must be added and visible to the e.g. Opportunity page layout. If they are not then they will not be available for use and would affect the integration. sfdc have plans to allow this in future releases.
- In all editions of sfdc there are certain fields that must **NOT** have their "visibility" removed in the security setup (setup→customize → opportunities →fields → e.g. amount→set field level security →the "visible" box must be ticked). In this same area these fields must **NOT** be defined as "read-only" otherwise they will not be able to be written to in the integration. If these are not visible or are defined as "read only" then the TCS Integration will not work. The affected fields are:
 - Opportunity → Opportunity_Amount
 - Opportunity_ID
 - Opportunity_Name
 - Opportunity_Link
 - Account → Opportunity_Account_ID
 - Account_Name
- Note: You must always keep at least one user defined as "administrator" in user maintenance otherwise nobody will be able to access the GPS Admin tab options.
- Any user wishing to update any of the GPS RADAR must have the authority in SFDC to update the Opportunity with which these these are associated. If they do not have this authority then they will not be able to save changes made in any sheets.

continued

Options

1. User Maintenance

- This shows the sfdc users set up in your Org. You need to visit here to make users active, define them as administrators, and to grant them licenses. Only you as administrator can do this. We are not allowed to grant licenses to your users if they send us mails asking to do so.
- The available number of licenses you have is displayed here. The sign in you supplied for set up will have one license for each product attached for set up. These can be removed and applied to others.
- If a licensed user leaves your company or no longer needs access then their license must be manually removed here.
- Note 1: If you have sfdc users who will see the new custom links inside the Opportunity etc layout but who will not have access, please can you send a mail to all these users explaining why they cannot access the software to avoid us receiving mails from them asking why they cannot access the software.
- Note 2: New users are added to your sfdc Org by yourself via the normal sfdc user setup routine. This is not part of the GPS Suite software.

2. Refresh user list

- When you add a new sfdc user, in order for them to be incorporated into the GPS Admin area you will need to visit this option, which upon opening will import all new users.

3. Radar Reference Data

- **3.1 Field Labels**
Define your own field labels here if required.
- **3.2 Lookup data**
List of all the predefined data for GPS Suite.
- **3.3 Products /Services Option**
Products / Services are currently defined as being mapped into GPS RADAR from your salesforce Opportunity
You are able to change this option so that Products are only entered in Radar and not mapped into salesforce (you cannot have both)
You can request that this is actioned for all of your users here.
- **3.4 Show Account Name Option**
Account Names are not currently displayed in Contact Selection lists within Radar. This option allows Account Names to be added, but has the effect of slowing down the start up of Radar if there are large numbers of contacts associated with accounts. Action this change here.
- **3.5 Account Contacts List Option**
This option allows you to specify whether Account Contacts are listed in Contact selection lists or not.
- **3.6 Action Plan Mapping Option**
SFDC activity changes are not currently reflected in the Radar Action Plan. This option allows you to start bi-directional changes i.e. changes made in SFDC are reflected in RADAR and vice versa.

4. Sales Prophet Reference Data (GPS Prophet customers use only)

- 4.1 Field Labels
Define your own field labels here if required.
- 4.2 Sales Stage Graph Names
Define the short names to be displayed on the GPS Prophet Graph

5. Field Mapping

Figure 1.

Action	Radar Item	Salesforce Item
Edit Clear	Associated GPS RADAR	Associated GPS RADAR
Edit Clear	Stage	Stage
Edit Clear	Source Of Urgency	Source Of Urgency
Edit Clear	Decision-Making Process	
Edit Clear	Close Date	Close Date
Edit Clear	Considered	
Edit Clear	Strategy Statement	
Edit Clear	Action Plan	Task
Edit Clear	Complete Radar (encrypted)	

Figure 1 shows the data that is mapped from GPS RADAR into sfdc.

- The only required field is “Associated GPS RADAR” and is a custom field set up to associate the GPS RADAR details with the sfdc Opportunity. This is added to the Opportunity page layout as read only and shows as ticked from the first time that a GPS RADAR record is saved.
- The other mapped fields (except “Task”) are examples of GPS RADAR data we have mapped to the sfdc Opportunity. These are all one to one relationships with the sfdc Opportunity. You can map these fields to existing text fields on the Opportunity or create a custom text field for each on the Opportunity to which you can map.
- The only item which is not a field is “Task” which creates a task record in sfdc when an action plan task is created in GPS RADAR. The action plan is mapped to the task table in sfdc.
- Complete Radar (encrypted) : This field is used to store all of your GPS Radar Data within the salesforce.com taking full advantage of their security / backup / network speed. This is for internal use only and should not be used. (This option is not currently available in Professional edition as sfdc do not allow it to be hidden and not placed on the Opportunity page layout)
- These are the only fields that can be currently mapped from GPS RADAR to sfdc.
- This mapping is one way only i.e. GPS RADAR updates sfdc with the above information but changing the data in sfdc will not update GPS RADAR.
- ***IMPORTANT*** All fields that are used to map to in this mapping setup must be defined as visible and must NOT be defined as “read only ” in the security setup (setup→customize → opportunities →fields → e.g. amount→set field level security →the “read only” box must NOT be ticked)

6. Setup Web Link

- This is used for set up and future configuration by ourselves and is not needed or used by the administrator.

7. Product Registration

- This is used for set up and future configuration by ourselves and is not needed or used by the administrator.

Pre-Requisites

1. The GPS Suite of applications within sfdc uses the sfdc web links to integrate. These web links send a sfdc session ID to our server which is used to get data and subsequently save data to sfdc.

There is a security setting in sfdc which, when set, prevents this ID from being sent to us and therefore must **not** be set in order for the integration to work. The details of this setting are shown below :

Setup → Security Controls → Session settings → The tickbox next to “Lock sessions to the IP address from which they originated” must not be ticked. (See fig. 2 below)

Figure 2.

The screenshot shows the 'Session Settings' configuration page in Salesforce. The page title is 'Session Settings'. Below the title, there is a subtitle: 'Set the session security and session expiration timeout for your organization.' The main content area is divided into two sections: 'Session Timeout' and 'Session Settings'. In the 'Session Timeout' section, there is a 'Timeout value' dropdown menu set to '2 hours' and a checkbox for 'Disable session timeout warning popup'. In the 'Session Settings' section, there are two checkboxes: 'Lock sessions to the IP address from which they originated.' and 'Require secure connections (https)'. The checkbox for 'Lock sessions to the IP address from which they originated.' is circled in red. Below this checkbox, there is a red-bordered box containing the text 'This cannot be ticked.'. At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

2. Users must have a valid printer installed to be able to print any of the GPS RADAR reports.
3. Pop-Up Blockers: Any pop-up blocker you may have installed must be configured to allow the site "www.websprint.com". If this site is not allowed you may have problems viewing the reports.

TCS Support

Should you require any assistance during your deployment of TCS, please do not hesitate to contact us at : GPS@whitesprings.co.uk

Please note that all support questions must be channeled to TCS Support via your Administrator.