

INSTALL & SETUP INSTRUCTIONS

Welcome

Welcome to the Visual Calendar, we hope you find this tool easy to use and a powerful app to help organize your information, such as marketing and sales content. Your sales happen in cycles and you often have new products and promotions running throughout the year, well now you can easily plot that information on the calendar and make it visible and interactive.

AppExchange Process

- Click on the “Get it Now” button from the listing on the AppExchange (appexchange.com).
- Select “Yes” or “No” if you have a Salesforce.com account. If you don’t have an account, you will be asked to open a free trial account with Salesforce.com.
- Select “Yes” or “No” if you are a Salesforce.com Administrator. You will need to be an administrator to install the application.
- Select to install the application to a Sandbox or Production organization.
- Select “Continue”.
- You will be taken to a Salesforce.com login screen to enter in your login credentials.

Installing the Application

- Review the Installation Instructions provided by Salesforce.com.
- Review “What You Are Installing” and “Where You Are Installing”.
- Check the box to agree with the “terms & conditions”.
- Click on the “Install” button.
- Enter the password credential again.
- You will then be taken to the “Package Installation Details” page where you can review the contents of the application that you are about to install.
- Click the “Continue” button.

Step 1 - “Approve Package API Access”

- Review and then click “Next”.

Step 2 - “Choose security level”

- Select what is appropriate for your installation.

NOTE | If you want to test it the select “Grant access to admins only”.

- Click “Next”.

Step 3 - “Install Package”

- Click “Install” when you are ready.

NOTE | You will receive an email from Salesforce.com once the package has been installed. You can go back to other things in the meantime.

After Installation

FIRST | Select “Visual Calendar” from the application drop down.

SECOND | Click on the “Install” button that appears after the “Visual Calendar” tab loads.

NOTE | You may want to have open the Visual Calendar and Visual Calendar HomePage Admin tabs to see how the information you are entering into the Admin tabs is displaying on the Visual Calendar tab.

THIRD | Select “Visual Calendar HomePage Admin” tab.

- Select the “Visual Calendar Homepage” record will contain all of the related information that is used to appear on the Visual Calendar tab.
- Scroll down to “Visual Calendar Priorities” and click “Edit” on the “2011” record.
- Check the box to make it “Active”.
- Click on the Save button.

NOTE | This made the 2011 calendar year appear on the “Visual Calendar” tab. You can then go back to the admin and edit or add records to make your own custom calendar.

FOURTH | Review the other fields that are located on the “Visual Calendar HomePage Admin” tab and enter your custom information.

Visual Calendar HomePage Admin Detail

- Name - Name of Visual Calendar
- Active - Yes or No
- Enable Quicklinks Panel - Show or Hide the Quicklinks
- Enable Center Panel 1 - Show or Hide 1st panel under calendar
- Enable Center Panel 2 - Show or Hide 2nd panel under calendar
- Enable Side Panel 1 - Show or Hide 1st panel under Quicklinks
- Enable Side Panel 2 - Show or Hide 2nd panel under Quicklinks
- Center Panel 1 Title - Title Name that appears on 1st panel under calendar
- Center Panel 2 Title - Title Name that appears on 2nd panel under calendar
- Side Panel 1 Content - Text that displays on 1st panel under Quicklinks
- Side Panel 2 Content - Text that displays on 2nd panel under Quicklinks

- Center Panel 1 ImageID - Image displayed in 1st panel under calendar. The ImageID is the end of the URL from an image that is stored in the Documents object. Example: salesforce.com/[015E000000gMU7](#). Note: image size is 50x50 (no greater than 200x50) pixels and can be replaced with an image of your choice.
- Center Panel 2 ImageID - Image displayed in 2nd panel under calendar. The ImageID is the end of the URL from an image that is stored in the Documents object. Example: salesforce.com/[015E000000gMU7](#) Note: image size is 50x50 (no greater than 200x50) pixels and can be replaced with an image of your choice.
- Enable Ticker - Show or Hide news ticker on Visual Calendar tab
NOTE | Ticker is not enabled by default.
- Ticker Speed - Slow down or speed up the ticker. Note: 0.01 is slow and 0.99 is very fast (0.05 is a nice speed to keep this setting at).

Visual Calendar QuickLinks

- This section is used to create three different links that appear on the Visual Calendar tab.
 - Quick Link - Create, edit, order and create hierarchies for the Quick Link side panel
 - Ticker Link - Create, edit, order the links on the Ticker
 - Calendar Link - Create, edit, order the links right below the Calendar

Visual Calendar Priorities

- This section is used to create the calendar Years (Example: 2012, 2013)
- Once a Priority is created then select the “Priority Name” to add the details to the calendar

Visual Calendar Priority Detail - This contains the details of the calendar field created above.

Visual Calendar Moments - Assign the calendar Moments.

- Moment Name - Name that appears on the calendar Moment
- Priority - The **Visual Calendar Priorities** (example: calendar year) record that you want this Moment to be assigned to.
- Image ID - Calendar Moment Image. Note: The ImageID is the end of the URL from an image that is stored in the Documents object. Example: salesforce.com/[015E000000gMU7](#)
- Month - Month that the Calendar Moment will appear
- URL - Link to Content, Content Pack, Campaign, Opportunity, Internal Website, External Website, Task, etc.
- Category - Which section in the calendar the Moment will be placed

Visual Calendar Quarterly Moments - Create quarterly initiatives that are directly under the calendar.

- Q Moment Name - Name of the Quarterly Moment
- Priority - The **Visual Calendar Priorities** (example: calendar year) record that you want this Moment to be assigned to.
- Quarters - Calendar quarters you wish to assign the moment to
- URL - Link for the Moment if it spans across the whole year
- Category - Which colored bar you want the quarterly Moment to be on
- Link 1-4 - URL for individual quarter Moment
- Link 1-4 label - Label for each Moment

Visual Calendar Paragraphs - Information related to the Center Panels (News, Metrics, etc.). There may be one or many entries per Center Panel

- Paragraph Name - Title of paragraph section.
- Homepage - Master record detail
- Category - Which center panel the information will appear
- Text - Text that appears in the paragraph
- Link - URL link for the “Paragraph Name”
- ImageID - Image that can be placed in the paragraph. Note: The ImageID is the end of the URL from an image that is stored in the Documents object. Example: salesforce.com/015E0000000gMU7
- Item Order - Order that the paragraphs will appear
- View Larger - Views an image full size if it has been reduced

Visual Calendar Categories - Define the Monthly and Quarterly Calendar Categories

- Category Name - Name of category
- Type - Monthly or Quarterly
- Visual Calendar Home Page Admin - This defines which Home Page the categories belong to
- ImageID - Image that can be used to identify the category. Image should be no wider than 50 pixels if a custom image is used. Note: The ImageID is the end of the URL from an image that is stored in the Documents object. Example: salesforce.com/015E0000000gMU7

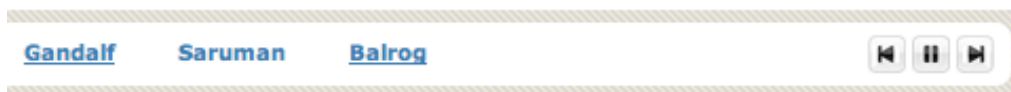
Navigating the Application

Visual Calendar tab - This tab contains information that is displayed on the calendar, quick links, news, metrics, etc. It can be customized in many ways by using the “visual calendar homepage admin tab”

Visual Calendar Home Page Admin tab - The administration tab for all of the text and links that appear on the Visual Calendar tab, such as calendar items, quarterly moments, quick links, news, metrics, etc.

Sections

Ticker & Ticker Links



Quick Links



Side Panel 1

Sales Communication
test content

Side Panel 2

Sales Learning & Training

Calendar Priorities

Switch View: **2011** 2012

Calendar Moments & Categories

	Quarter 1		
	Jan	Feb	Mar
Monthly 1	M1 Jan	M2 Feb	
Monthly 2			

Calendar Quarterly Moments & Categories



Calendar Links

Test 5

[test link under calendar 2](#) [test link under calendar](#) [C1](#) [C](#)

Center Panel 1 & Links

News Title
test

Center Panel 2 & Links

Metrics Title

Support

Product Page: <http://letsstrategize.com/visual-calendar/> or
Product Blog: <http://letsstrategize.com/category/blog/visual-calendar/> or
Visit www.letsstrategize.com or
Email: support@letsstrategize.com