MCA Application Post Installation Configuration Guide

July 23, 2014

Document History

Version #	Author	Date (dd/mm/yyyy)	Comments
1.0	Sneha Patil	04.07.2014	Initial Draft
1.1	Sneha Patil	23.07.2014	New enhancement in the application.

Table of Contents

1 Introduction

- MCA Application Configuration Guide is designed to provide the steps that need to be configured after installation of the MCA Application. It also provides the pre-requisites required for the MCA application configuration.
- This manual can help you to fix the required post installation configuration settings for MCA application to achieve the effective and efficient performance of the MCA application.

2 Prerequisites

Sr. No.	Item	Description
1	MCA Installation	Install the MCA application using the provided URL.
2	Conga Installation	Install the Conga Composer from AppExchange.
3	Lead Scoring Rule	Install the Lead Scoring Rule application from AppExchange.

3 Lead Mappings

- Map the fields on Lead as given in *Table 1.*

Table 1 – Lead Mapping Fields

Sr. No.	Lead Fields	Fields to Map	Object
1	Average Monthly CC Sale	Monthly CC Avg	Account
2	Convert	ConvertedAccount	Account
3	Credit Score	Credit Score	Opportunity
4	Desired Amount	Amount Requested	Opportunity
5	ISO	ISO	Opportunity
6	ISO Sales Rep	ISO Sales Rep	Opportunity
7	Lead Created Date (Copy for Mapping)	Lead Created Date	Opportunity
8	Monthly Gross Sales	Gross Monthly Sales	Account
9	Set Opportunity Status	Set Opportunity Status	Opportunity
10	Total Lead Score	Lead Score at Conversion	Opportunity
11	Years in Business	Years In Business	Account

4 Page Layout Assignments

- Page Layout need to configure.

Table 2 – Object Page Layout

Sr. No.	Page Layout	Object	Description
1	Merchant	Account	Assign **Merchant** Page Layout as a Master Page Layout for the Account object.
2	Lead Layout	Lead	Default Lead Page Layout from MCA package will be act as Master Page Layout for the Lead object.
3	Opportunity Layout	Opportunity	Default Opportunity Page Layout from MCA package will be act as Master Page Layout for the Opportunity object.
4	Contact Layout	Contact	Default Contact Page Layout from MCA package will be act as Master Page Layout for the Contact object.
5	Contract Layout	Contract	Default Contract Page Layout from MCA package will be act as Master Page Layout for the Contract object.

- By default managed package page layout are not assigned to all objects, therefore manually we have to assign packaged page layouts by going through below mentioned steps:-

1 To assign **Page Layout** to the Opportunity, Contact, Account, Contract, Lead objects

1.1 Click on the **Setup** menu.

1.2 Click on **Customize > Object name > Page Layouts.**

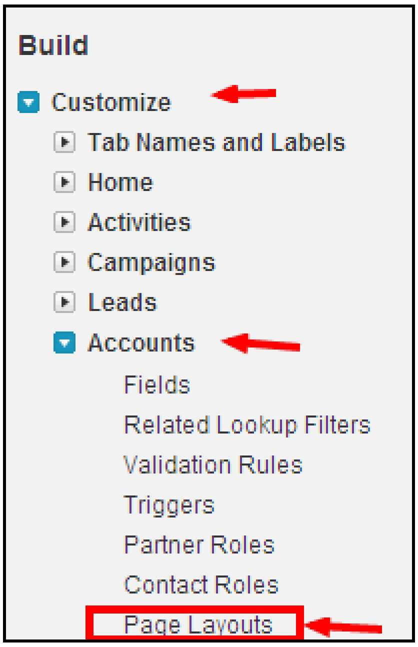

Figure 1 – Customize Page Layouts

1.3 Click on the **Page Layout Assignment** tab > Edit Assignment.

1.4 Click on the Profile, to select the profile on which you need to assign the packaged page layout. If you want to select multiple profile simultaneously, you need to press ctrl +click on that profile. After selection the profile it will display as shown in the *Figure 2.*

Profiles	Master	Bank	ISO	Merchant
Contract Manager	Merchant	Bank	ISO	Merchant
Custom: Marketing Profile	Merchant	Bank	ISO	Merchant
Custom: Sales Profile	Merchant	Bank	ISO	Merchant
Custom: Support Profile	Merchant	Bank	ISO	Merchant
Customer Community Login User	Merchant	Bank	ISO	Merchant
Customer Community User	Merchant	Bank	ISO	Merchant
Customer Portal Manager	Merchant	Bank	ISO	Merchant
Customer Portal Manager Custom	Merchant	Bank	ISO	Merchant
Customer Portal Manager Standard	Merchant	Bank	ISO	Merchant
Customer Portal User	Merchant	Bank	ISO	Merchant
Force.com - One App User	Merchant	Bank	ISO	Merchant
Gold Partner User	Merchant	Bank	ISO	Merchant
High Volume Customer Portal User	Merchant	Bank	ISO	Merchant
HighVolumePortal	Merchant	Bank	ISO	Merchant
Marketing User	Merchant	Bank	ISO	Merchant
Partner Community Login User	Merchant	Bank	ISO	Merchant
Partner Community User	Merchant	Bank	ISO	Merchant
Read Only	Merchant	Bank	ISO	Merchant
Solution Manager	Merchant	Bank	ISO	Merchant
Standard Platform User	Merchant	Bank	ISO	Merchant
Standard User	Merchant	Bank	ISO	Merchant
System Administrator	Account Layout	Bank	ISO	Merchant

Figure 2 – Page Layout Edit Assignment for Standard Object

1.5 Click on **Save** after assigning the profiles and perform a quick round of testing by navigating through **Object** tab > Click on any record > check the Layout.

2 For all other Objects:

2.1 Click on **Create > Object >** select the object for which Page Layout need to assign.

2.2 Go to the **Page Layout** section and click on **Page Layout Assignment** tab as shown in *Figure 3.*

2.3 Follow the steps as described on 1.3 and 1.4.

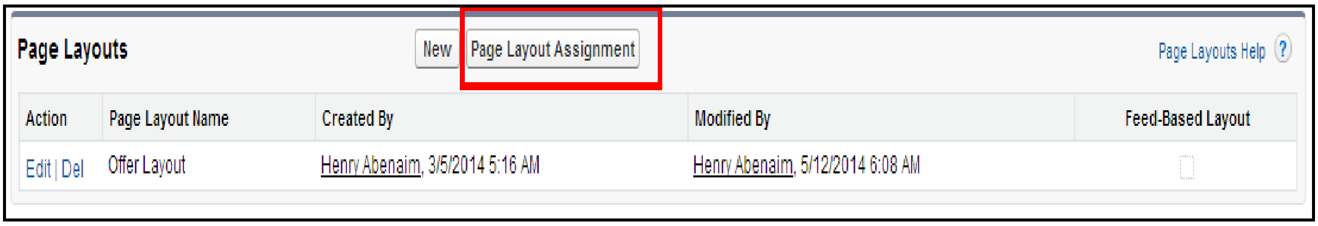

Figure 3 – Page Layout Edit Assignment for Custom Object

3 Merge Page Layout for Standard objects

3.1 Click on the **Setup** menu.

3.2 Click on **Customize > Object name > Page Layouts.**

3.3 To merge Page layout, either add existing fields to MCA page layout or add MCA field to existing standard page layout. OR you can create Legacy structure in which you need to create legacy record type and assign existing standard page layout to it which holds old records of the Standard object.

5 Lead Rating Formula on Lead

- If the "Lead Scoring App" is installed in your org, then only this step is required, otherwise skip this step.
- To create a lead rating field, go to below mentioned steps
  1) Go to **Setup > Customize > Lead > Fields > New.**
  2) Select the Data Type **Formula** and click Next.

Figure 4 – Field Type Selection Wizard

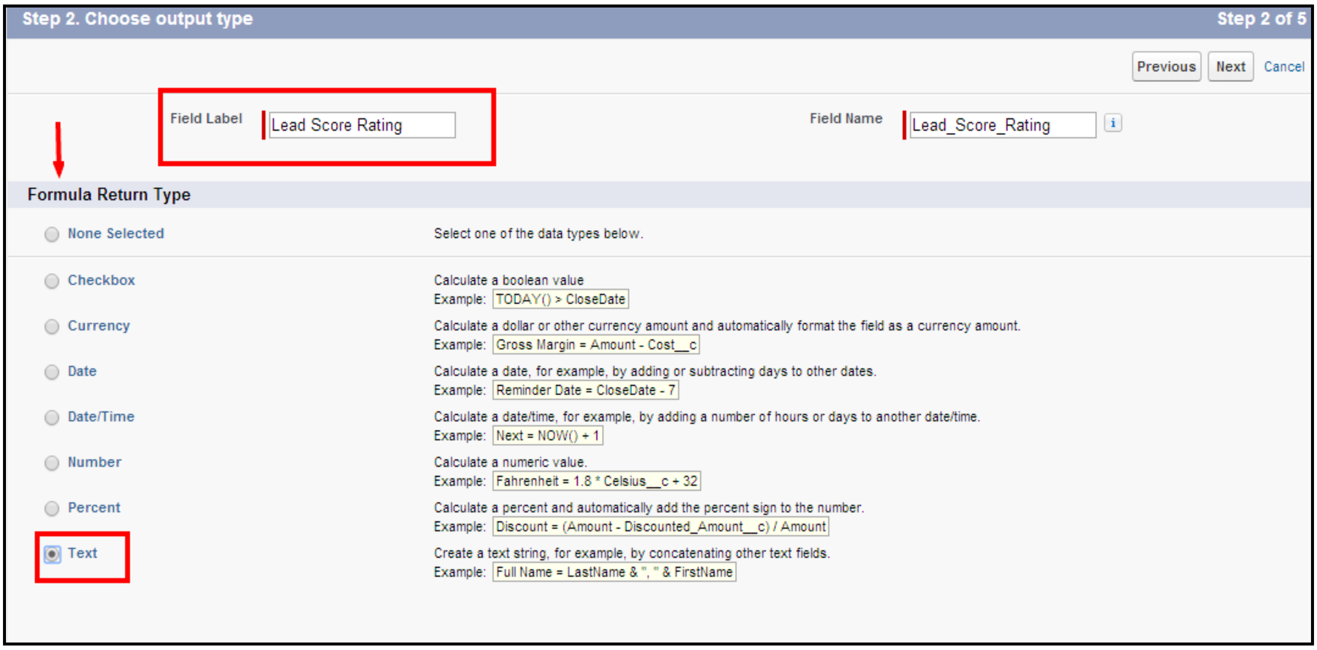

Figure 5 – Field Output Type Selection Wizard

3) Type the Field Label as **"Lead Score Rating"** and select Formula Return Type as **"Text".**
4) Click Next and write the below logic inside the **Formula Editor** as shown in *Figure 6*.

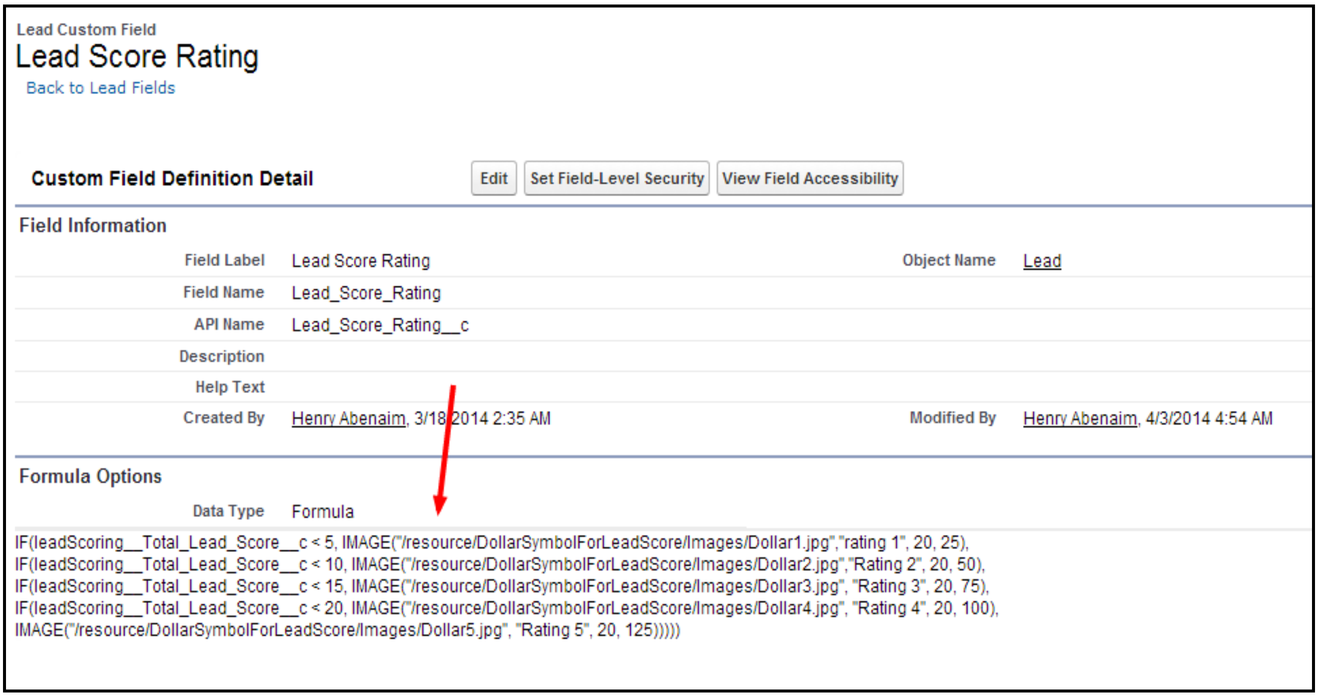

Figure 6 – Formula Editor

Formula for Lead Score rating:
IF(leadScoring__Total_Lead_Score__c < 5,
IMAGE("/resource/MCAApp__DollarSymbolForLeadScore/Images/Dollar1.jpg","rating 1", 20, 25),
IF(leadScoring__Total_Lead_Score__c < 10,
IMAGE("/resource/MCAApp__DollarSymbolForLeadScore/Images/Dollar2.jpg","Rating 2", 20, 50),
IF(leadScoring__Total_Lead_Score__c < 15,
IMAGE("/resource/MCAApp__DollarSymbolForLeadScore/Images/Dollar3.jpg", "Rating 3", 20, 75),
IF(leadScoring__Total_Lead_Score__c < 20,
IMAGE("/resource/MCAApp__DollarSymbolForLeadScore/Images/Dollar4.jpg", "Rating 4", 20, 100),
IMAGE("/resource/MCAApp__DollarSymbolForLeadScore/Images/Dollar5.jpg", "Rating 5", 20, 125)))))

5) Click **Next > Next > Save**.

6 Opportunity Contact Role

- Create Business owner role and mark it as **"Default".**
    1) Click on **Setup > Customize > Opportunity > Contact Roles > New.**
    2) Create a new role as **"Business Owner"** and mark it as **"Default".**

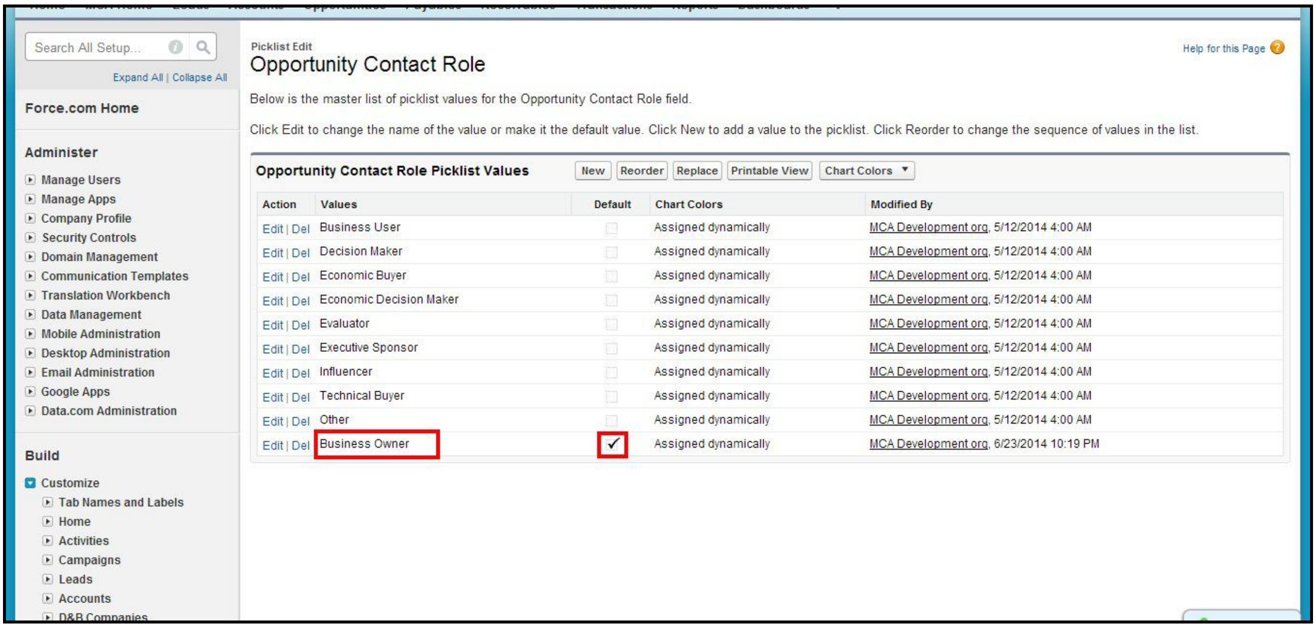

Figure 7 – Opportunity Contact Role

7 Custom Setting Configuration

Configure following Custom Settings:

- **Payables/ Receivables Status**
    - Custom Setting Stores the Status of the Payables and Receivables (Transaction Line Items) which are not to be displayed on the Transaction while creating Line Items.
    - Steps to create Custom Setting Record:
        1. Click on the **Setup** menu and then click on the **Custom Setting.**
        2. Click on the **Payables/ Receivables Status Setting.**
        3. Click on **Manage** button.
        4. Create two records as shown below with Name as:
            4.1. Cancelled
            4.2. Paid

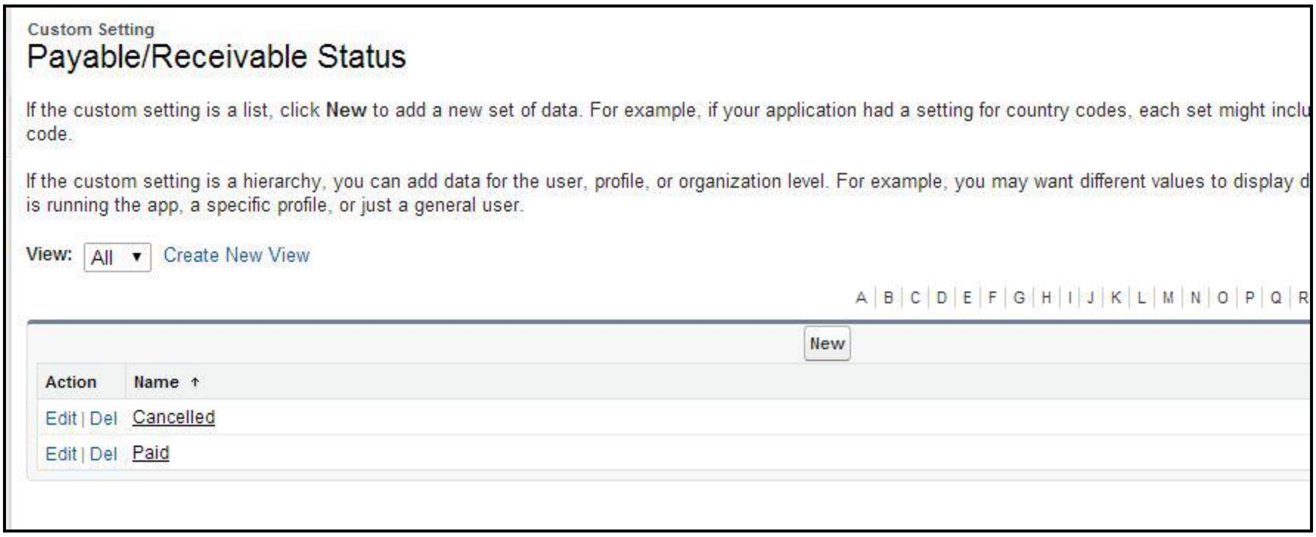

Figure 8 – Status of the Payable/ Receivable which are not displayed while creating Transaction

- **Admin Accounting Setting**
    - Stores the Values that are displayed on the Admin Page Accounting Section:
        - **Name** – Stores the Label that is to be displayed on the Accounting section of Admin Page.
        - **URL** – Stores Partial(only id) or complete URL of the link which opens on the click of the Link.
    - Steps to create Custom Setting data:
        1) Click on the **Setup** menu and then click on the **Custom Setting.**
        2) Click on the **Manage** of Admin Accounting Setting.

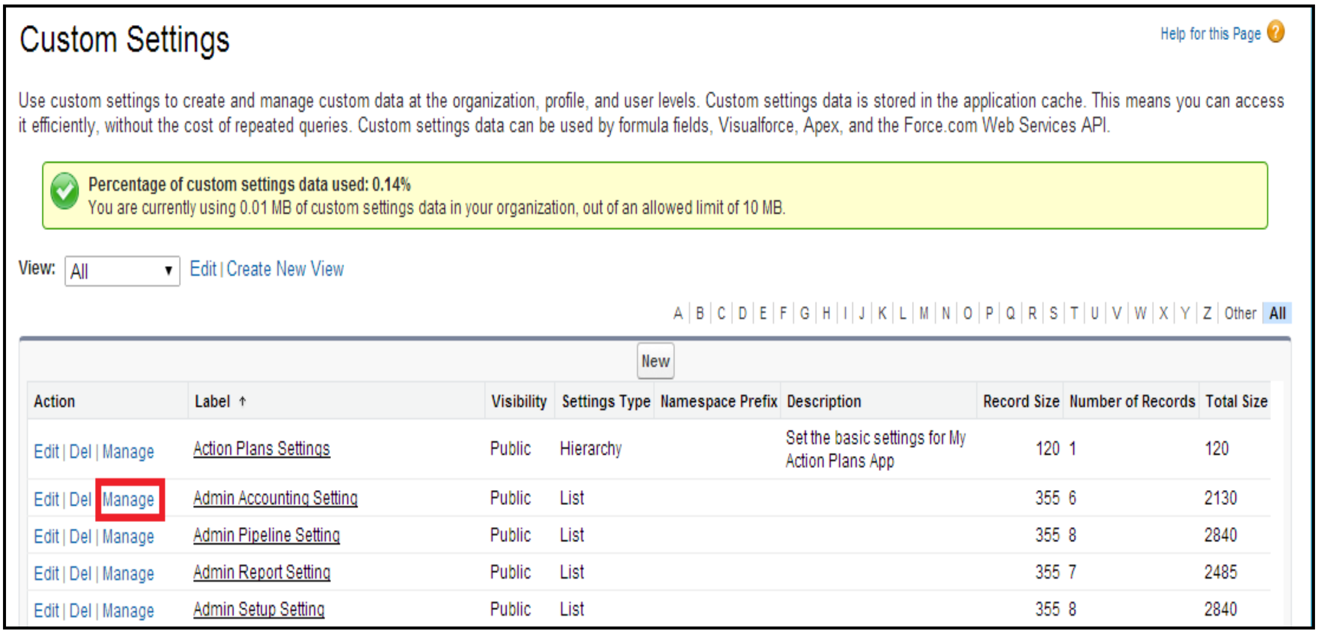

Figure 9 – Manage on Admin Accounting Setting

3) Click on **New** field.
4) Create record with Name and the URL of the value that is to be displayed on the Accounting column of Admin Page as shown in *Figure 11.*

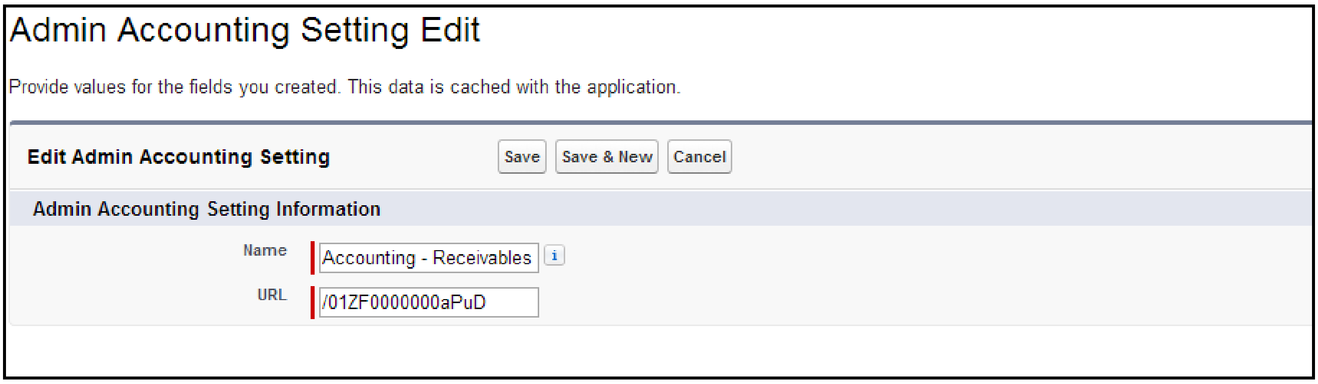

Figure 10 –Create Admin Accounting Setting Record

Figure 11 – Record for Admin Accounting Setting

- Similarly create data for all the following values:

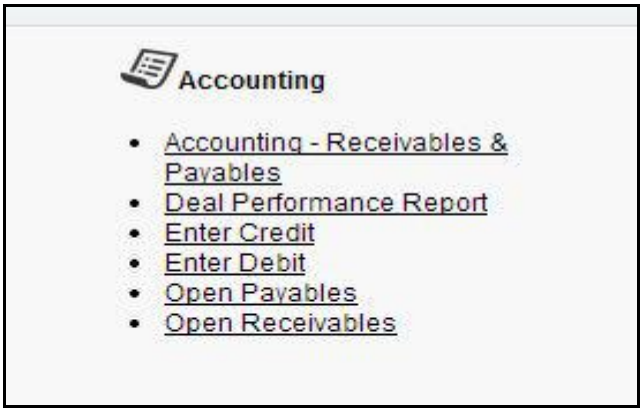

Figure 12 – Accounting Section on Admin Page

- **Admin Report Setting**
  - Stores the values that are to be displayed on Report Section of Admin Page.
    - **Name** – Stores the Label that is to be displayed on the Admin Page.
    - **URL** – Stores Partial or complete URL of the link which opens on the click of the Link.
  - Steps to create Custom Setting data:
    1) Click on the **Setup** menu and then click on the **Custom Setting**.
    2) Click on **Manage** of Admin Report Setting.
    3) Click on **New** Button.
    4) Create records for all the following data with Name and the URL of the value that is to be displayed on Report column of Admin Page.

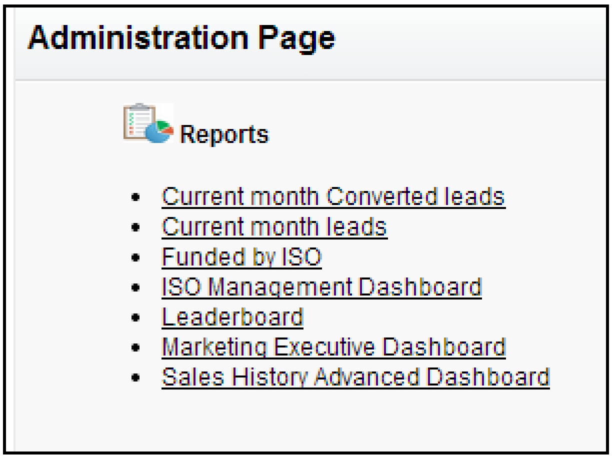

Figure 13 – Report Section of Admin Page

- **Admin Pipeline Setting**
  - Similar to Admin setting populate this setting with the values that are to be displayed on Pipeline section of Admin Page.

- **Admin Setup Setting**
  - Similar to Admin setting populate this setting with the values that are to be displayed on Setup section of Admin Page.

- **FundingApplicationPage_ShowCongaButton**
  - Stores if the Email PDF and Create PDF button on funding Application should be visible or not on the funding Application.
    - **Name –** Stores the Name of the Button on the Funding Application.
    - **Active** – Checkbox stores whether to display the button on the Funding Application Page (It should be Active if Conga is available in the org, else the Active checkbox should be false).
  - Steps to create data:
    1. Click on the **Setup** menu and then click on the **Custom Setting.**
    2. Click on **Manage** of FundingApplicationPage_ShowCongaButton setting.
    3. Click on **New** button.
    4. Create following Data:
       4.1. Create PDF
       4.2. Email PDF

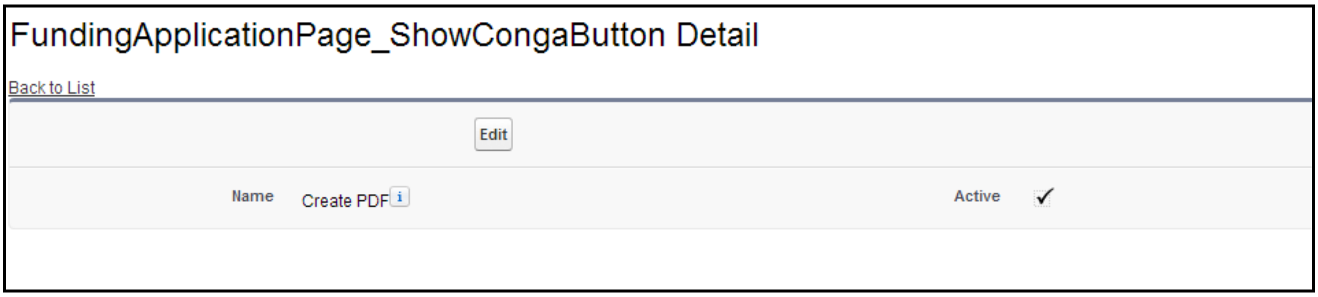

Figure 14 – Create PDF data for Custom Setting

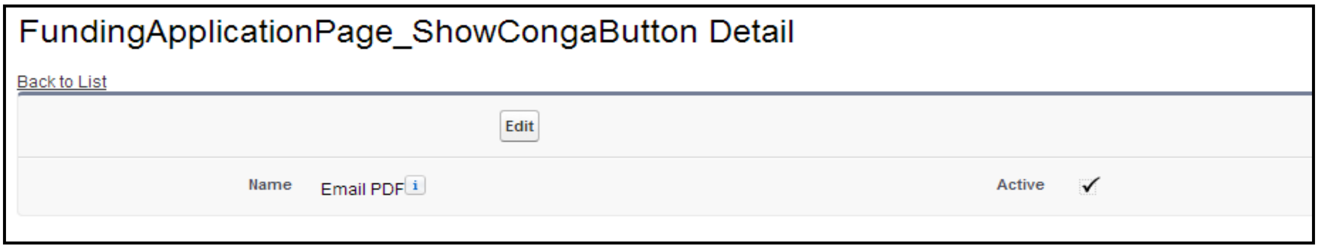

Figure 15 – Email PDF data for Custom Setting

- **Excluded Subjects**
  - Add records to ExcludedSubjects custom setting by using Manage button.
  - This will exclude count of Activities on Lead having subject name as mentioned in ExcludedSubjects custom setting.

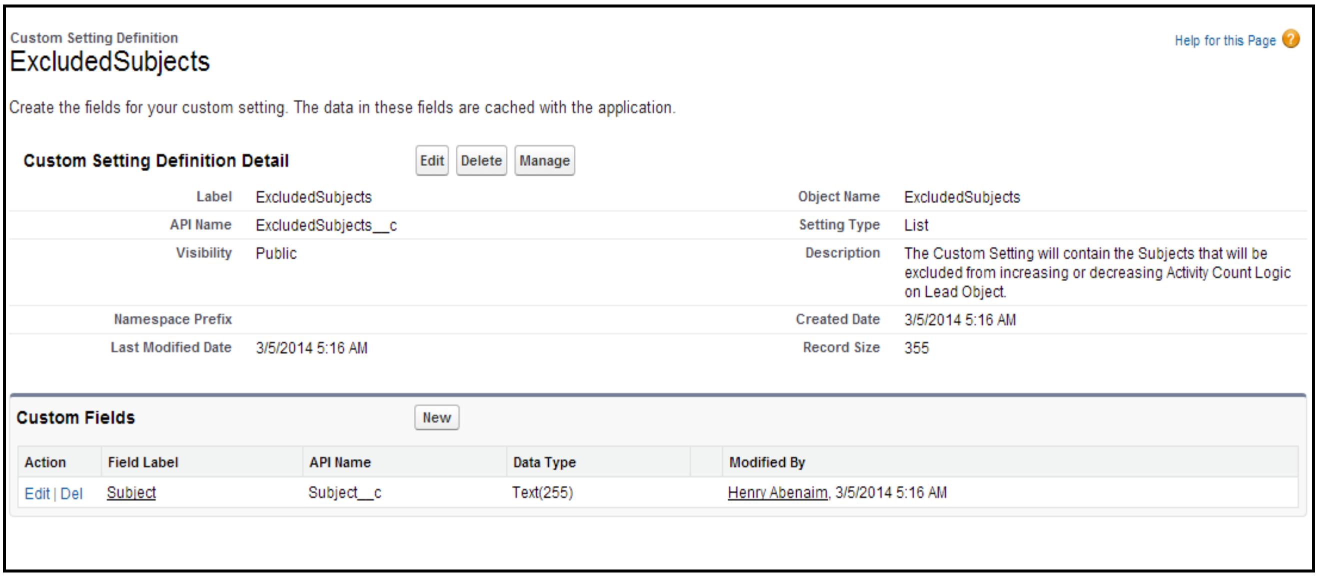

Figure 16 – Excluded Details Custom Settings

8 Configure Custom Labels

- **BankListId**
  - Stores the List View Id of Bank list view on Account.
  - Steps to capture the ID:
    1) Click on **Accounts** Tab.
    2) Select **Banks** from View drop down list.

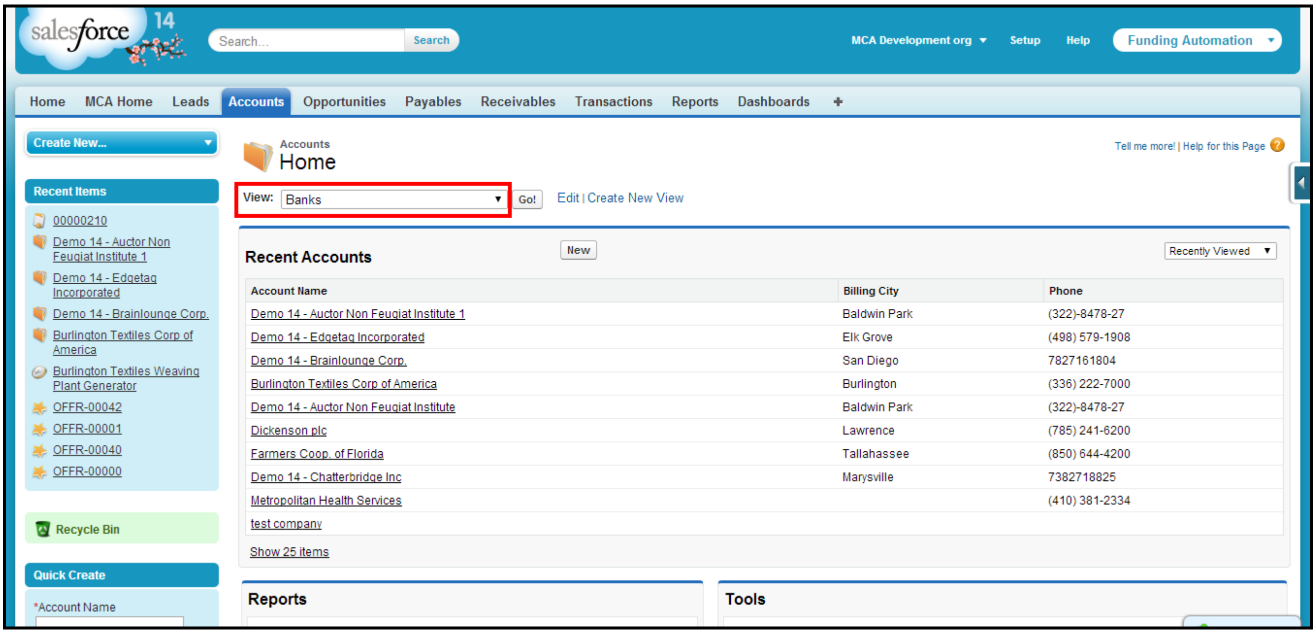

Figure 17 – Bank List View on Account

3) Click **Edit** button.

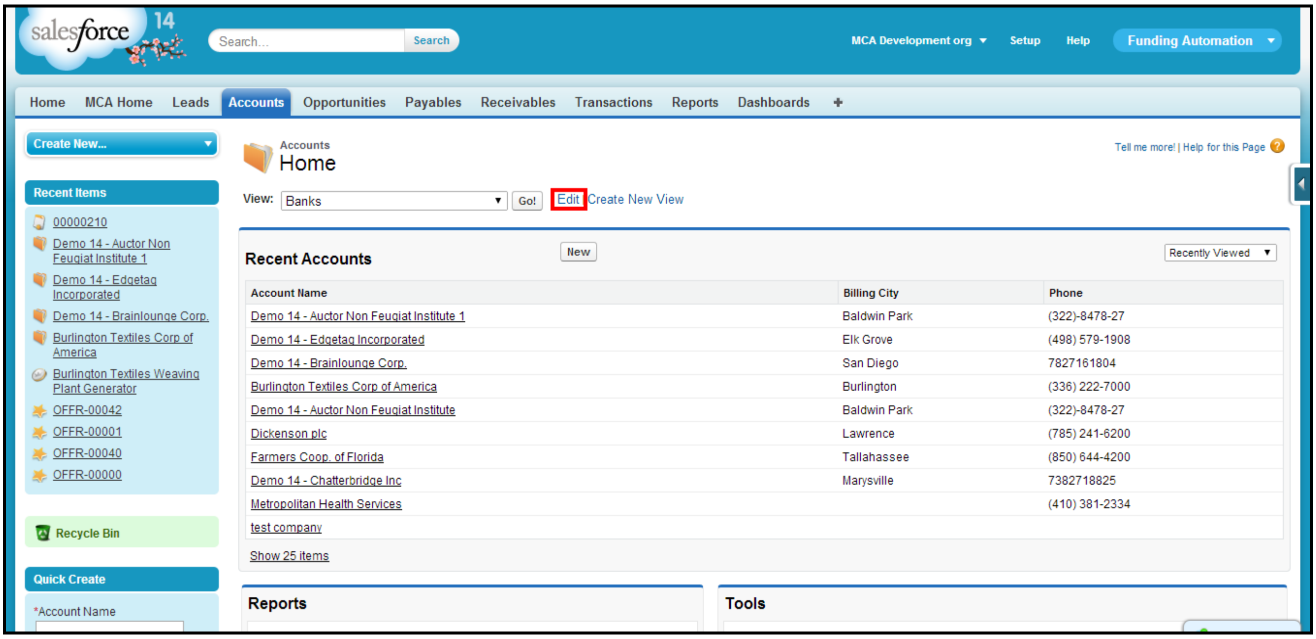

Figure 18 – Edit button on Bank List View

4) Copy the **ID** as shown in *Figure 19.*

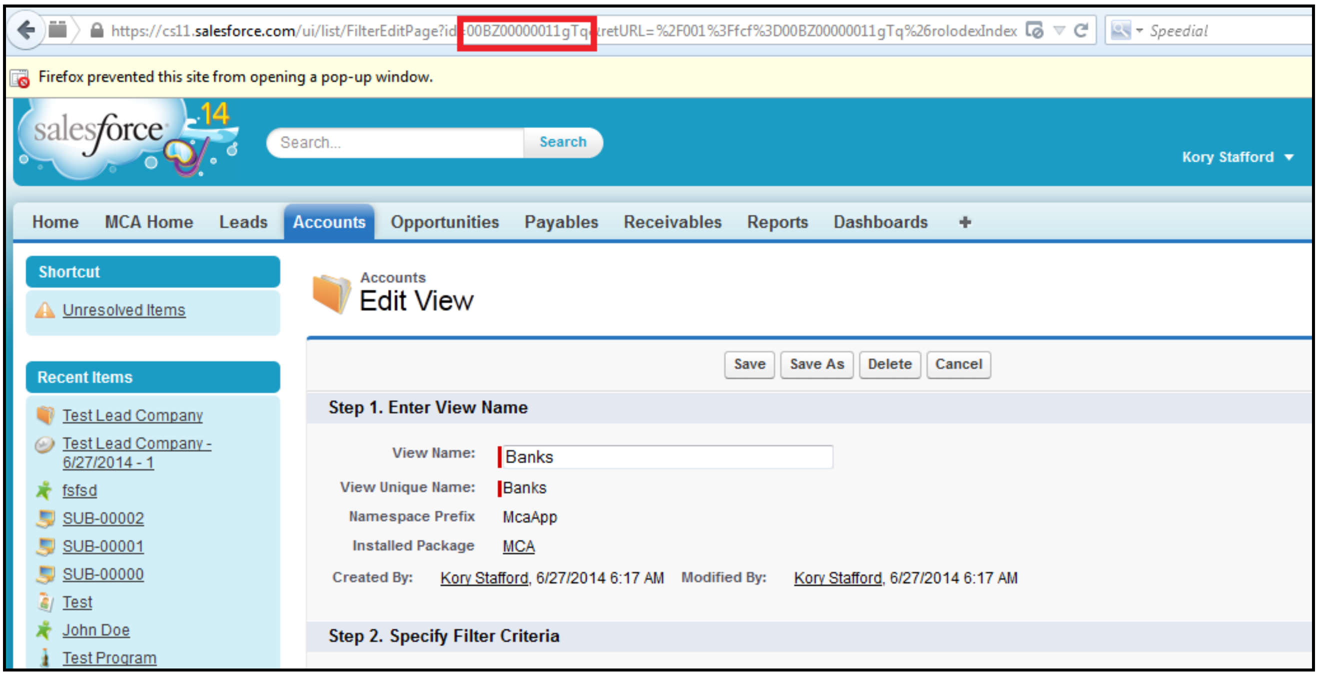

Figure 19 – Copy the ID of Bank List View

5) Click on the **Custom Label** and then click on **BankListId** label.
6) Click on **New Local Translations/ Overrides** and paste the ID as shown in *Figure 20.*

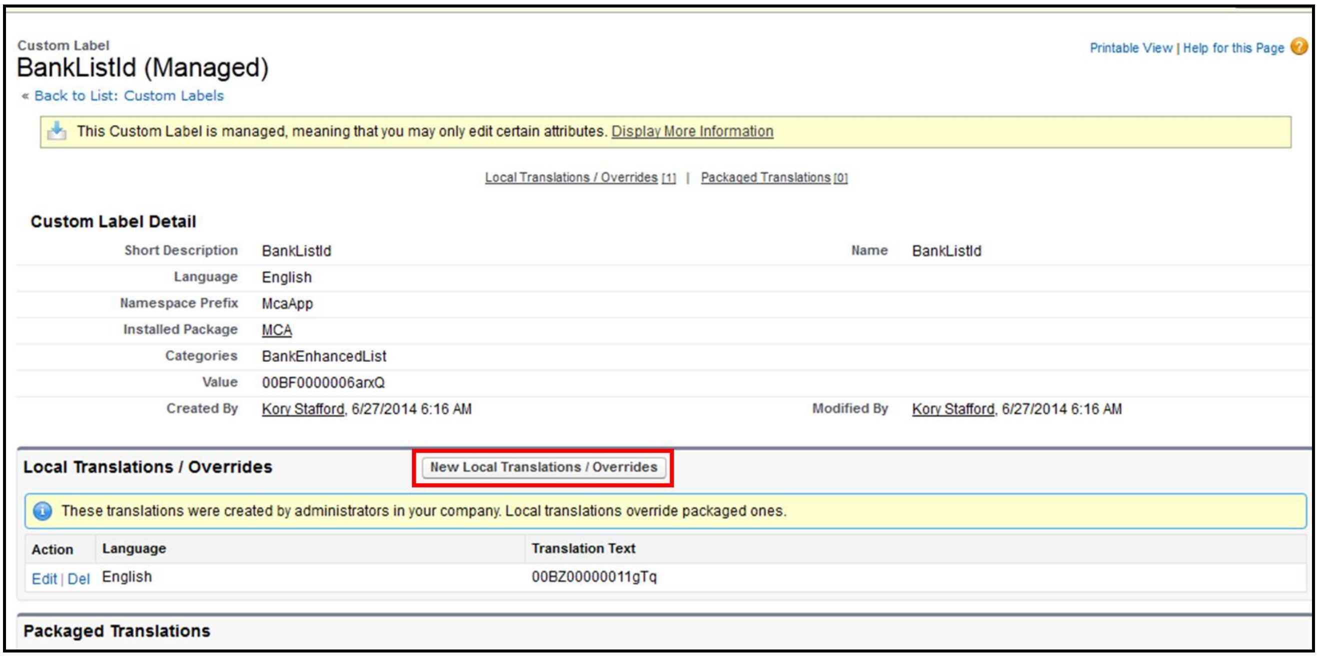

Figure 20 – BankListId Label with the New Value

- **ISOListId**
  - Stores the List View ID of ISO list view on Account Steps to capture the ID.
  - Similar to Bank List view ID, capture the ISO list view Id and store it in ISOListId Custom Label.

- **DashboardIdeas_CampaignsUrl**
  - Stores the ID of the component that is displayed on MCA Home Campaign link. The component that is displayed is Campaign Metrics Dashboard.

- Steps to populate the Label
  1) Click on **Dashboards** tab.
  2) Go to the folder **Campaign Dashboard.**
  3) Click on **Campaign Metrics Dashboard.**
  4) Copy the ID of the dashboard.
  5) Go to custom Labels, open DashboardIdeas_Campaigns URL label.
  6) Click on 'New Local Translations / Overrides' and paste the ID.

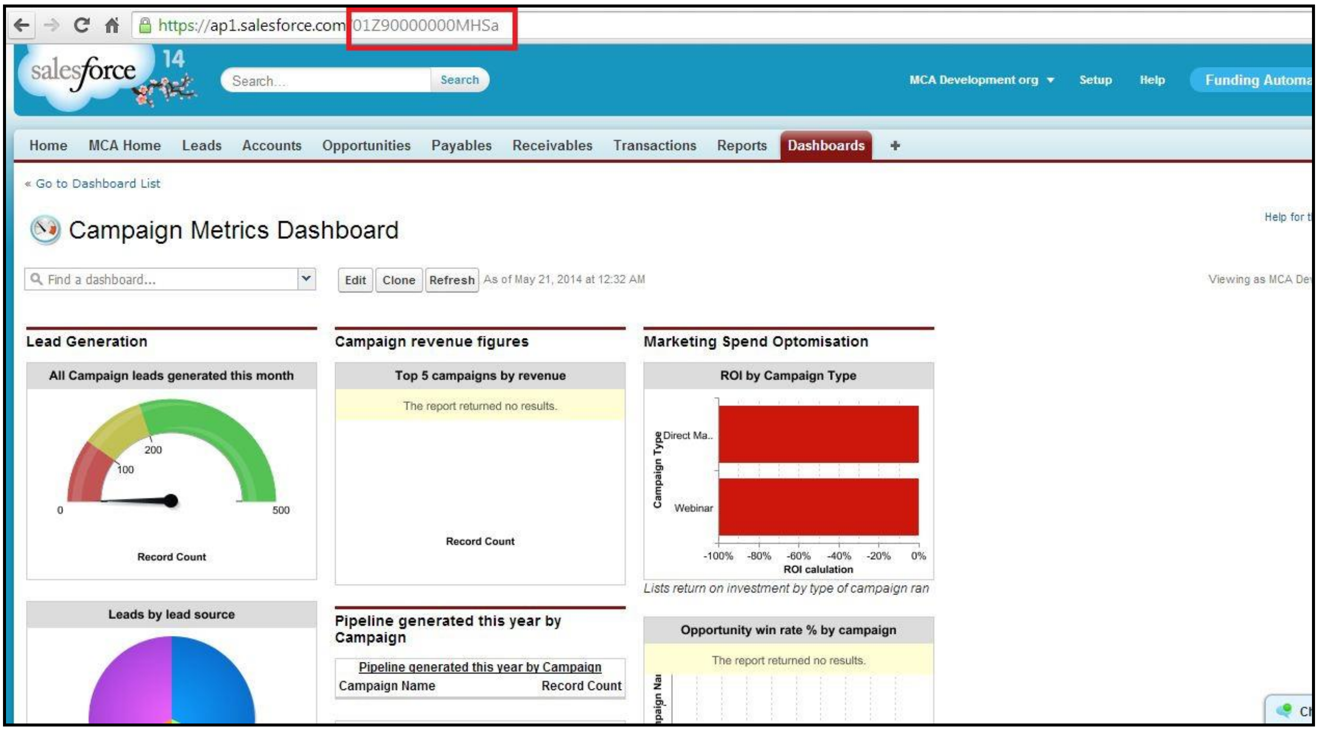

Figure 21 – ID of Campaign Metrics Dashboard

- **DashboardIdeas_Lead**
  - Stores the Id of the component that is displayed on MCA Home Lead image link. The component that is displayed is Leads Management Dashboard.
  - Similar to the above label store the Id of Leads Management Dashboard in DashboardIdeas_Lead label.

- **DashboardIdeas_DealsDashboard**
  - Stores the Id of the component that is displayed on MCA Home Deals image link .The component that is displayed is Deal Management Dashboard.
  - Similar to the above label store the Id of Deal Management Dashboard in DashboardIdeas_ DealsDashboard

- **Dashbaord_Renewal_Path_Url**
  - Stores the partial URL of the component that is displayed on MCA Home Renewals image link. The component that is displayed is Manage Renewal Page.

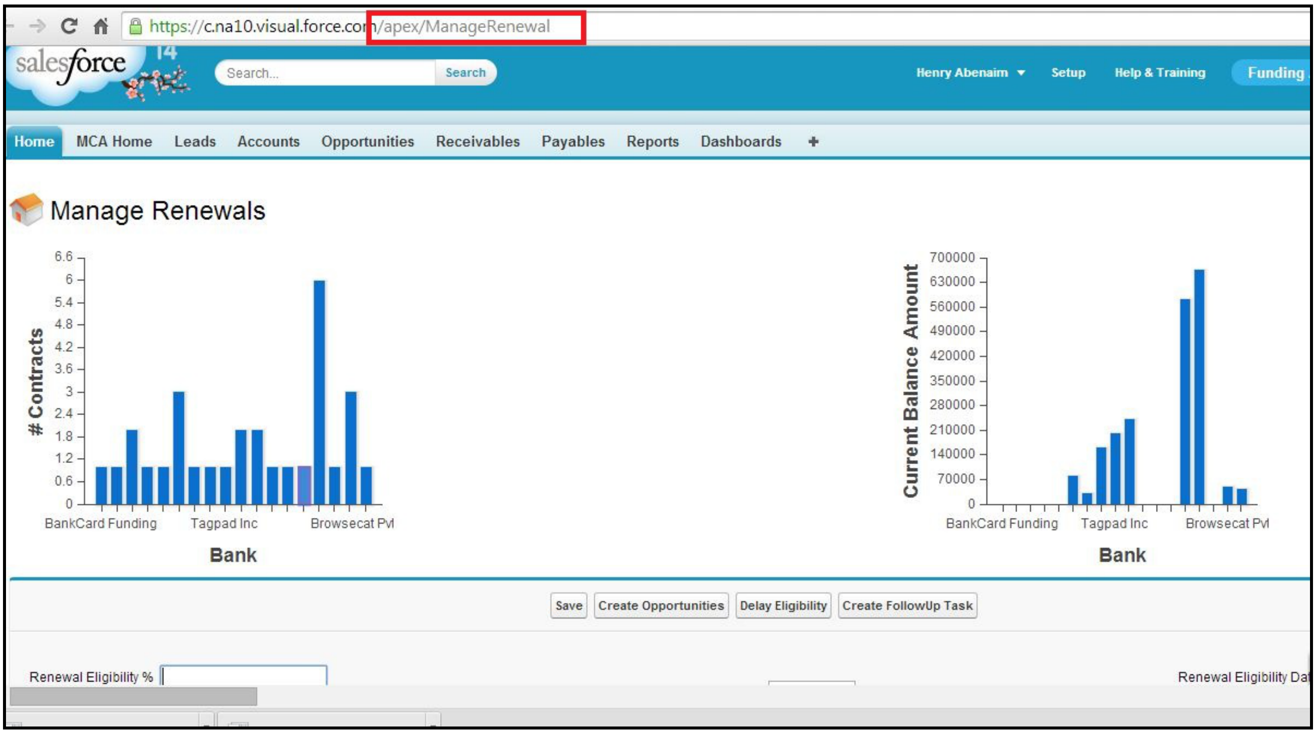

Figure 22 – Partial URL for Manage Renewal Page

- **DashbaordIdeas_Commissions_Path_Url**
  - Stores the Id the component that is to be displayed on MCA Home Commissions image link. The component that is displayed is Accounting – Receivables & Payables Dashboard.
  - Store the Id of Accounting – Receivables & Payables Dashboard in the label.

- **DashboardIdeas_Syndication_Dashboard**
  - Stores the Id the component that is to be displayed on MCA Home Syndication image link. The component that is displayed is Syndication Dashboard.
  - Store the Id of Syndication Dashboard in the label.

- **DashbaordIdeas_Dashboard_Path_Url**
  - Stores the Id the component that is to be displayed on MCA Home Dashboards image link. The component that is displayed is Company Performance Dashboard.
  - Store the Id of Company Performance Dashboard in the label.

- **DashboardIdeas_MyInbox**
  - Stores the Id the component that is to be displayed on MCA Home My Inbox image link.
  - Store the URL of Activities Page if the Activities Package exist else add the home Page URL in the label.

- **DashboardIdeas_Admin**
  - Stores the partial URL of the component that is displayed on MCA Home Admin image link. The component that is displayed is Admin Page.

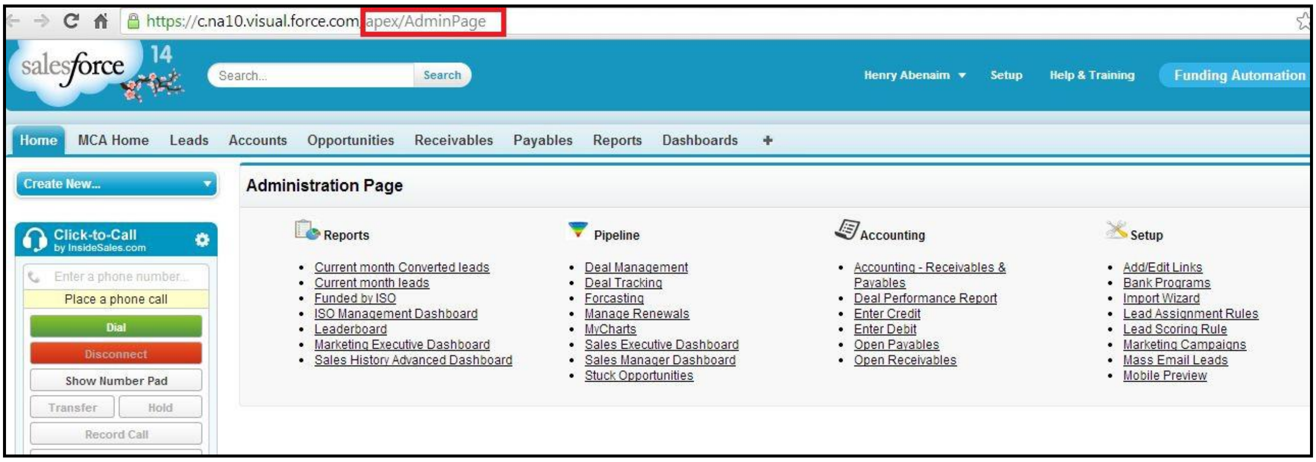

Figure 23 – Partial URL for Admin Page

- **MCA_Home_Task_Activities_Management_Dashboard**
  - Stores the Id the component that is to be displayed on MCA Home Tasks image link. The component that is displayed is Sales activity dashboard
  - Store the Id of Sales activity dashboard in the label.

- **Email_Stips_Template_Id**
  - Stores the Id the Email Stips Visualforce Email Template.
  - Steps:
    1) Go to Visualforce Email template.
    2) Open Email Stips template.
    3) Copy the ID of the template.
    4) Paste it to Email_Stips_Template_Id label.

- **FundingApplicationTemplateId**
  - Add the ID of Funding Application Conga template.

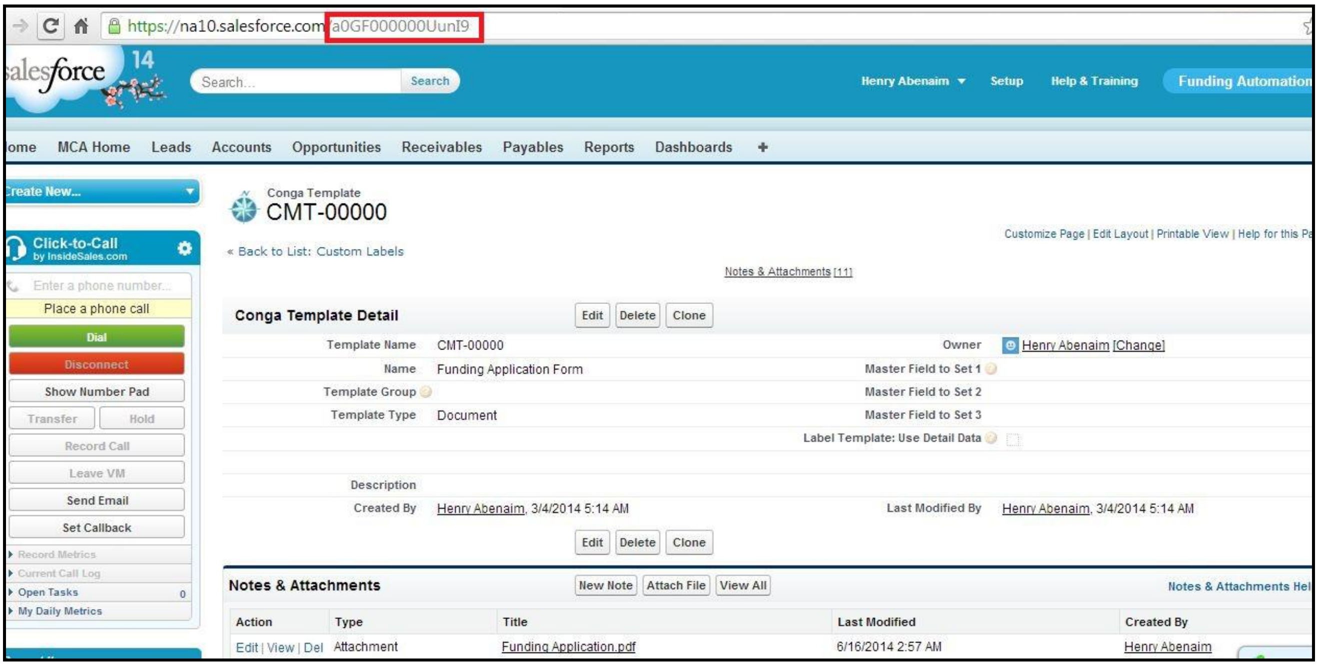

Figure 24 – Funding Application Template ID

- **CongaTemplateId**
  - Stores the Funding Application Email Template ID.

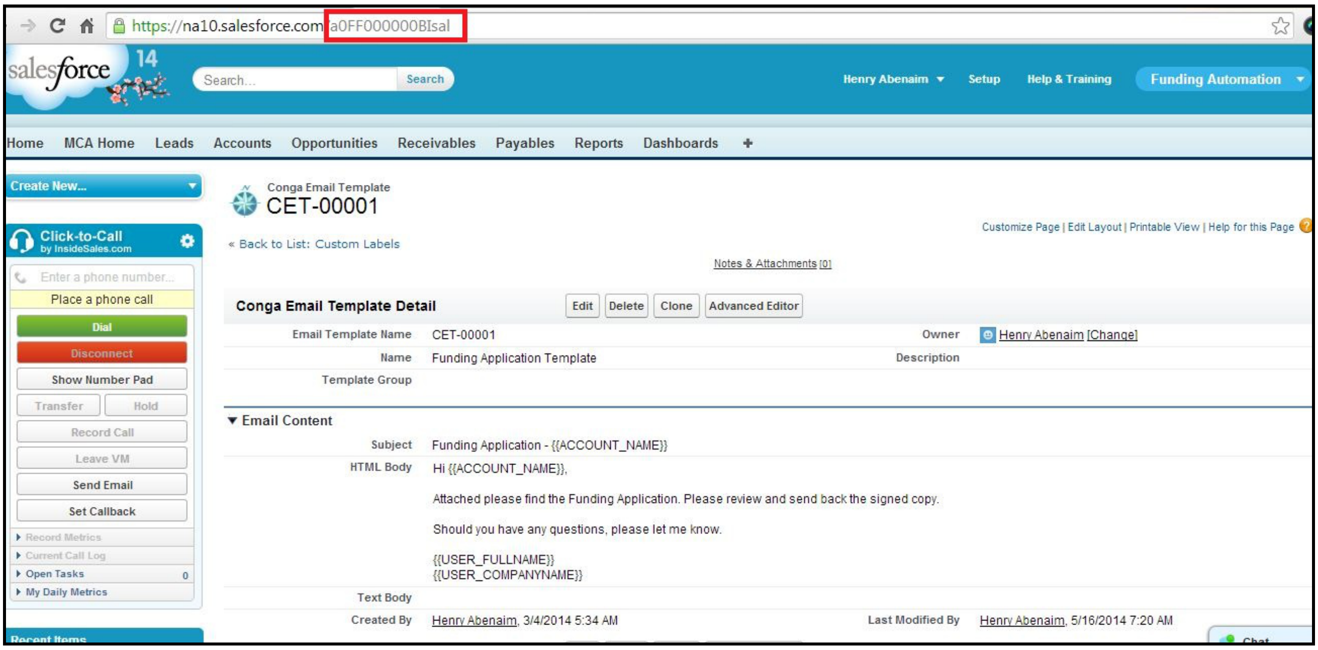

Figure 25 – Funding Application Conga Email Template ID

- **CongaQueryId_Offer**
  - Store the ID Conga Query named Offer.

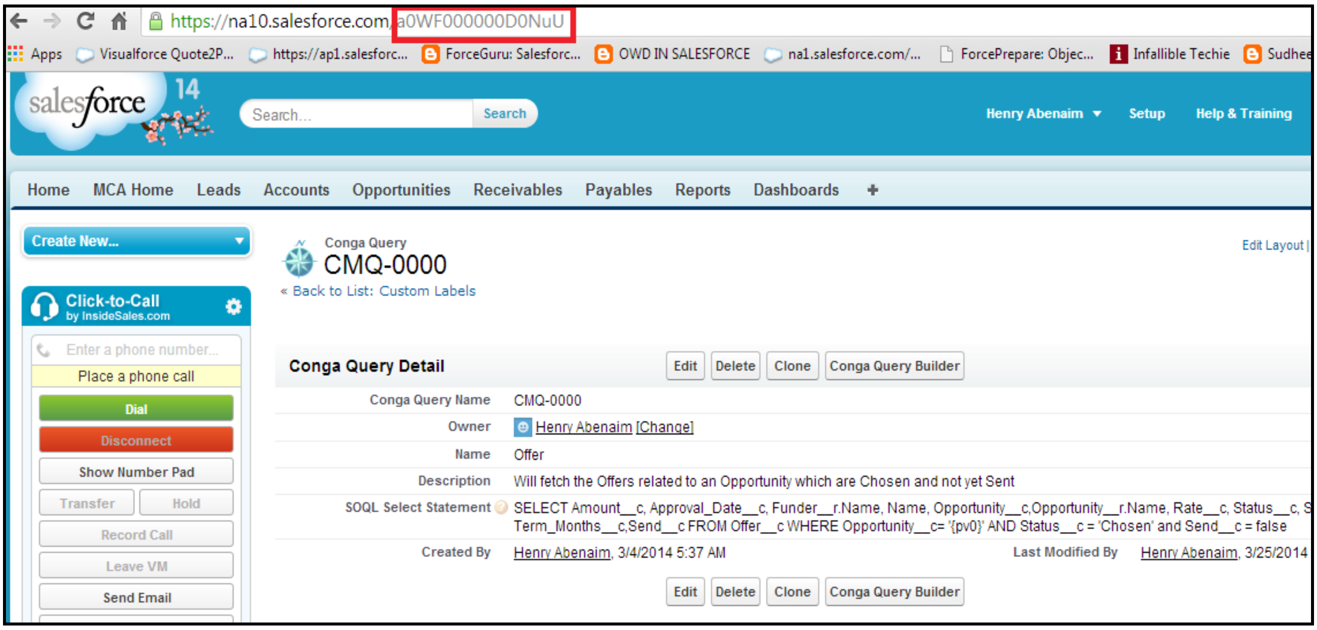

Figure 26 – Conga Query for Offer

- **CongaEmailTemplate_Offer**
  - Stores the Id of the Conga Email Template Offer.

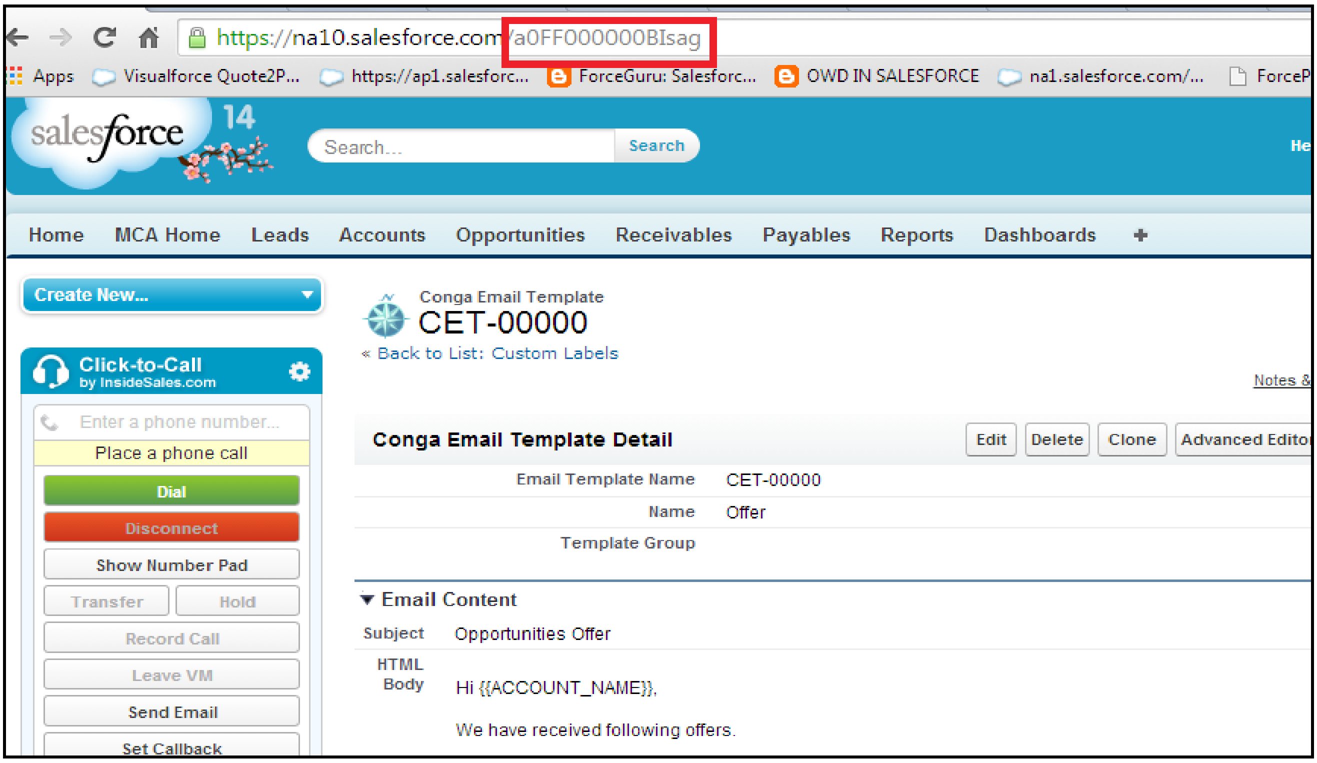

Figure 27 – Conga Email Template for Offer

- **SubmissionWizard_LogoName(Optional) -**
    - Put the name of **Document Name** (e.g. Here in above image Document Name is specified as Submission Email Logo, which is mentioned as a value in ubmissionWizard_LogoName value) in value of **SubmissionWizard_LogoName** custom Label.

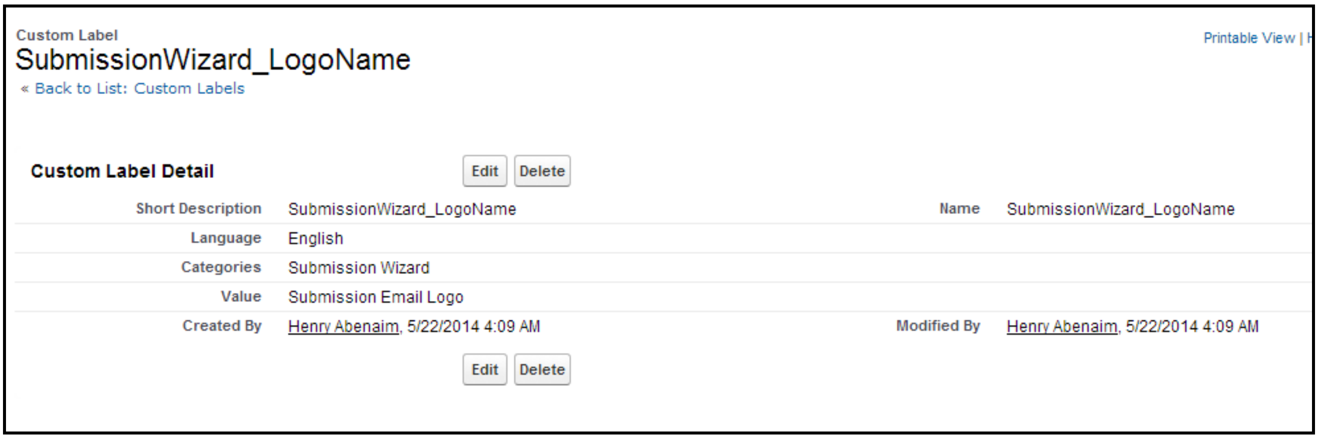

Figure 28 – Label for Submission Wizard Logo

8.1 Enable Translations for the Org

To enable the translations for the Org follow the steps as given below:

1) Go to **Translation settings** from Setup as shown in *Figure 29.*

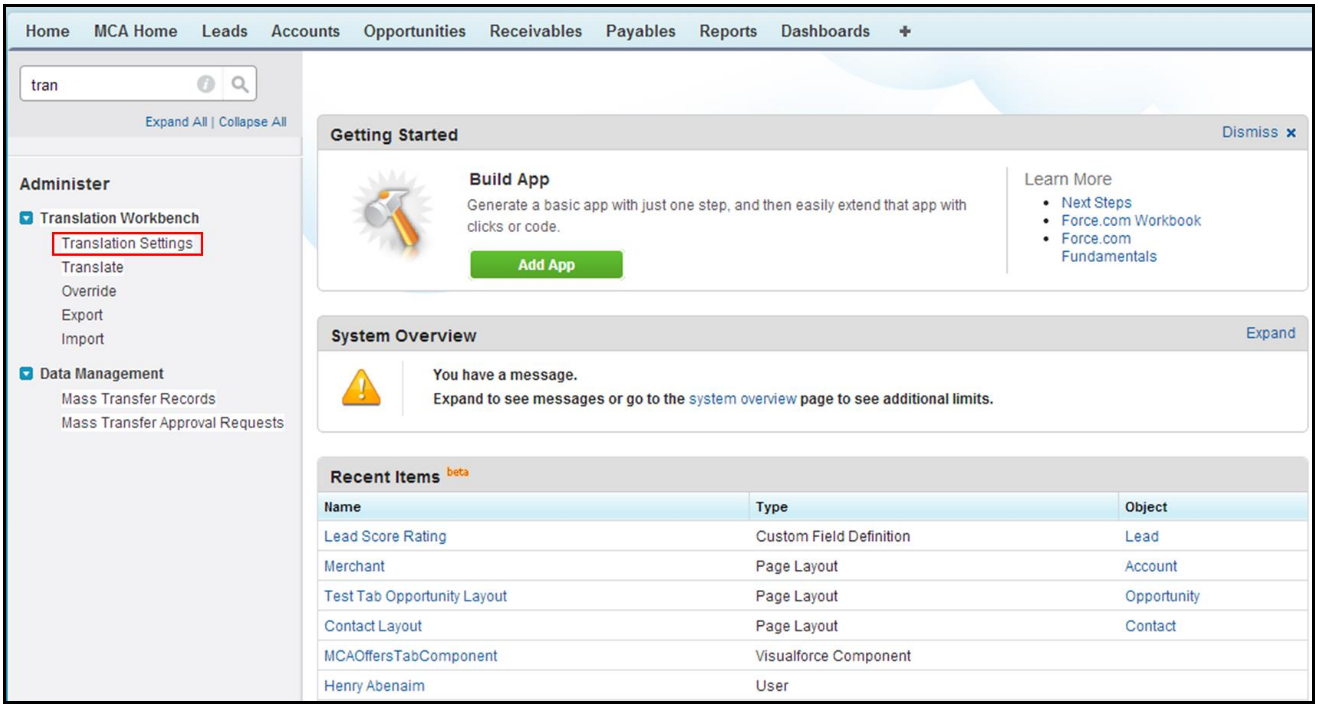

Figure 29 – Go to Translation Settings from Setup

2) Check if the **Translation Workbench** is enabled, if not click on **Enable** button as shown in *Figure 30.*

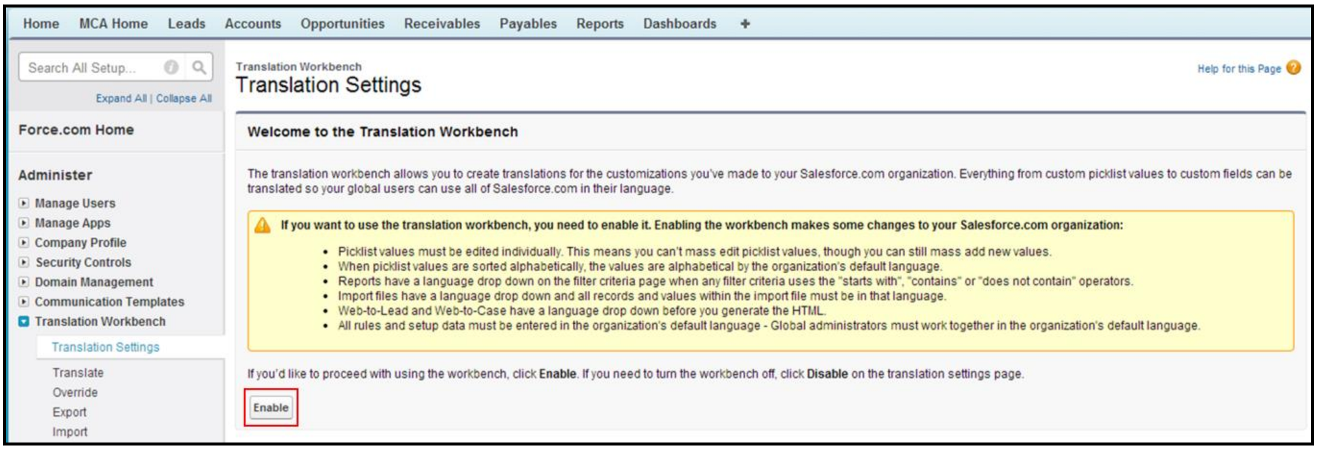

Figure 30 – Enable Translations

3) Go to **Custom Labels** and then click on **New Local Translation/ Overrides** button as shown in *Figure 31.*

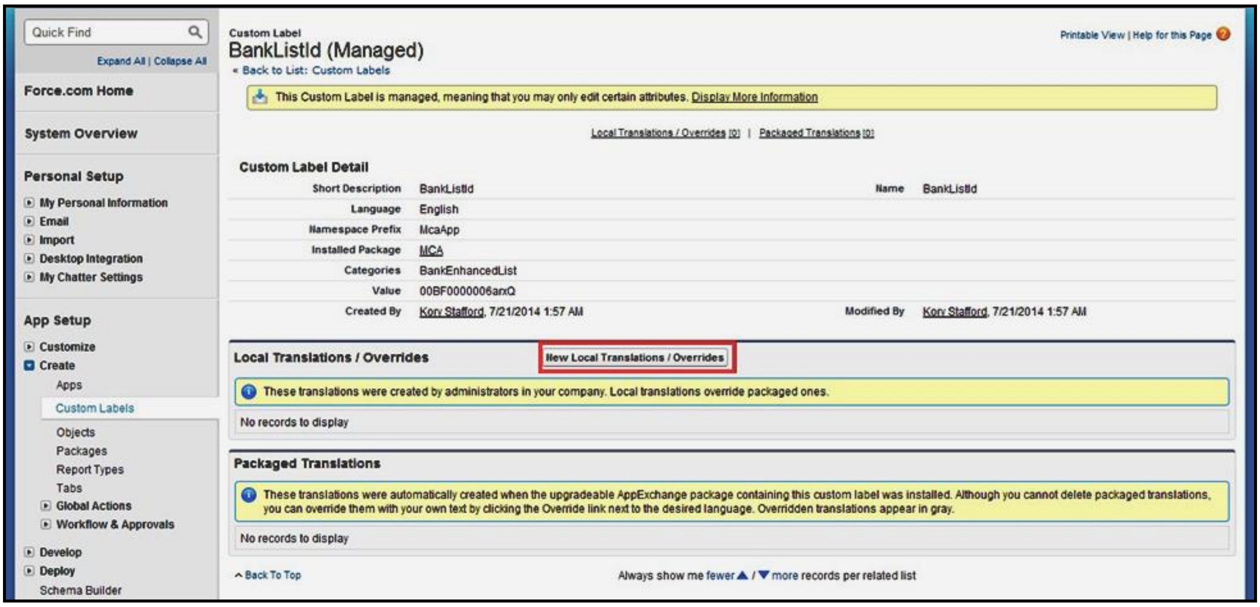

Figure 31 – Click on New Local Translations / Overrides

4) Enter the value for the label that you want to override in the **Translation Text** box as show in *Figure 32.*

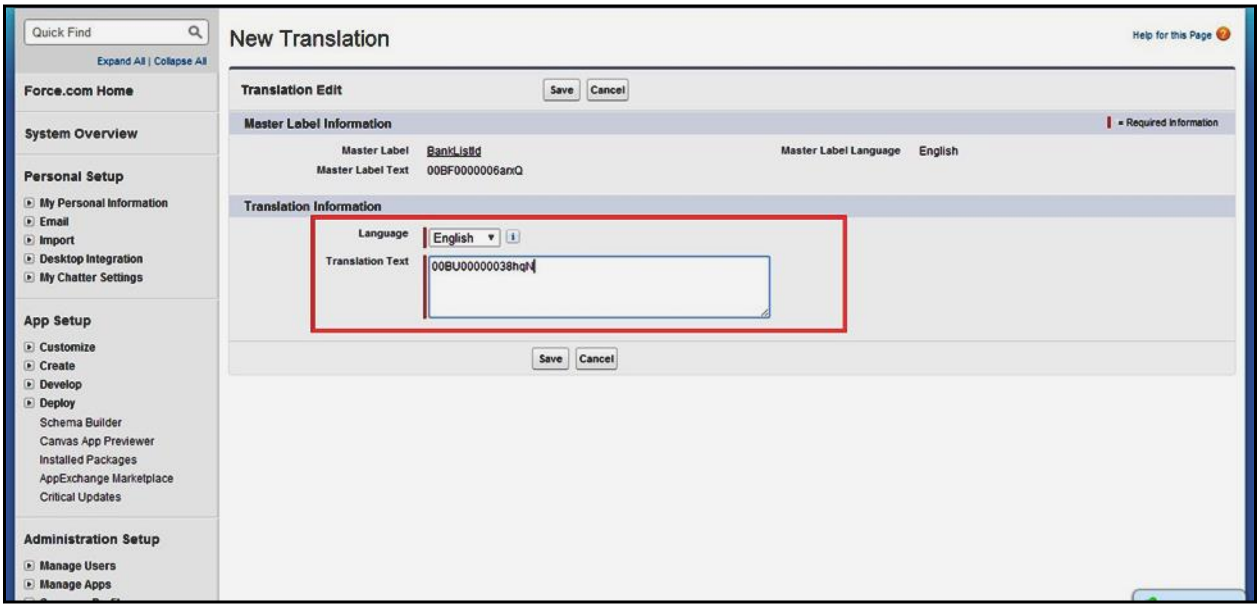

Figure 32 – Enter the Value for the Label

9 Create record for Submission Mail Detail Object

- Click on All tabs to create record of **Submission Email Detail** object.

Figure 33 – Submission Email Detail Tab

- To create record of **Submission Email Detail** object, put the details as shown in *Figure 34.*

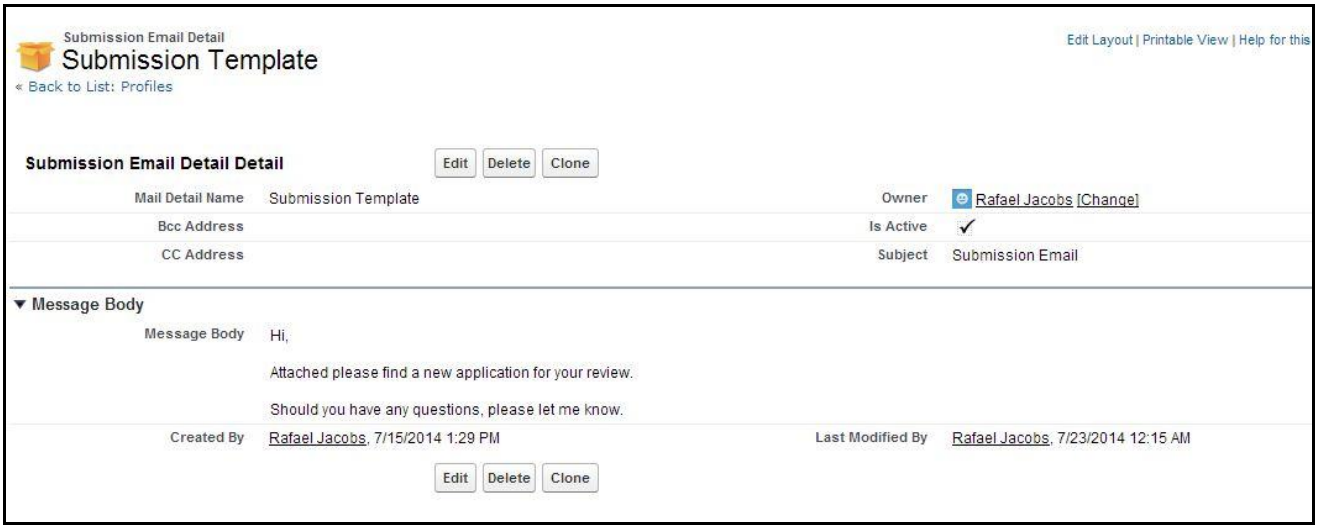

Figure 34 – Submission Email Detail Record

10 Create a document record (Optional) to display image in Submission Email

- Create a record of **Document**, which holds the image.

  e.g. In below Image, Record of Document contains Logo Cloud My Biz, which is referred in Email send on click of **Send Without Attachment** and **Send With Attachment** button in **Submission Wizard.**

Figure 35 – Submission Email Logo

11 Set Funding Application as a Default App

- Set Funding Application as a Default App for All Profiles and Make Custom Tab Visible
- Go to the Profiles and make Funding App as a default app.

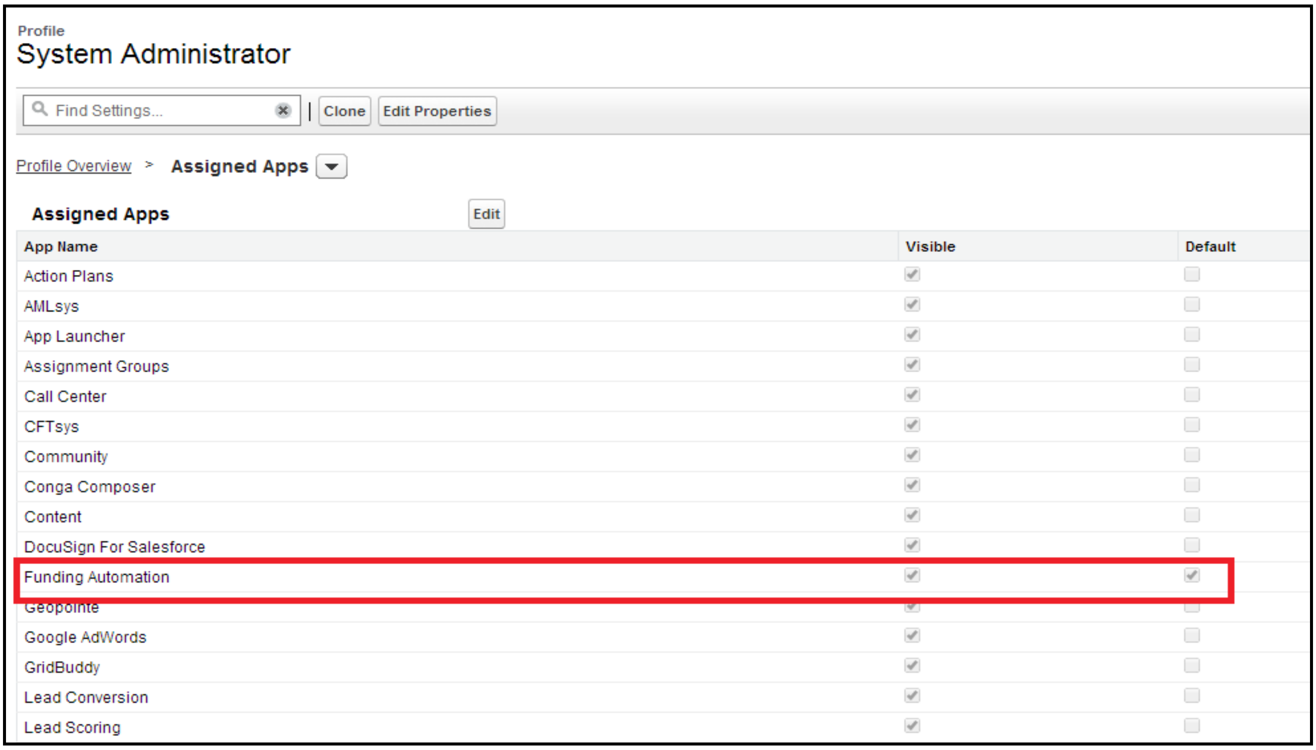

Figure 36 – Profile Setting

12 Opportunity Stage Field Changes

- To display proper progress bar on Opportunity detail page, we need to match the Opportunity Stages as in Progress Bar formula field.
- Go to the **Opportunity Stage** field and match the Stage values as mentioned below or as used in **Progress_Bar__c** formula field.
- **Opportunity Stages -**
    - Prospecting
    - Application Sent
    - Application In
    - Application Missing Info
    - Underwriting
    - Approved
    - Declined
    - Agreement Requested
    - Agreement Sent
    - Agreement Signed
    - Funded
    - Closed Lost
    - Renewal Prospecting
    - Renewal Requested

13 Conga Template Configuration

- **Funding Application Template**
  - Upload the Funding Application PDF in Conga Template
  - Steps:
    1) Create a Funding Application PDF.
    2) Open Conga Template.
    3) Create a new Funding Application Template.

14 Conga Email Template Configuration

- **Offer Email Template**
  - Create Email Template with name as 'Offer' as shown in *Figure 37.*

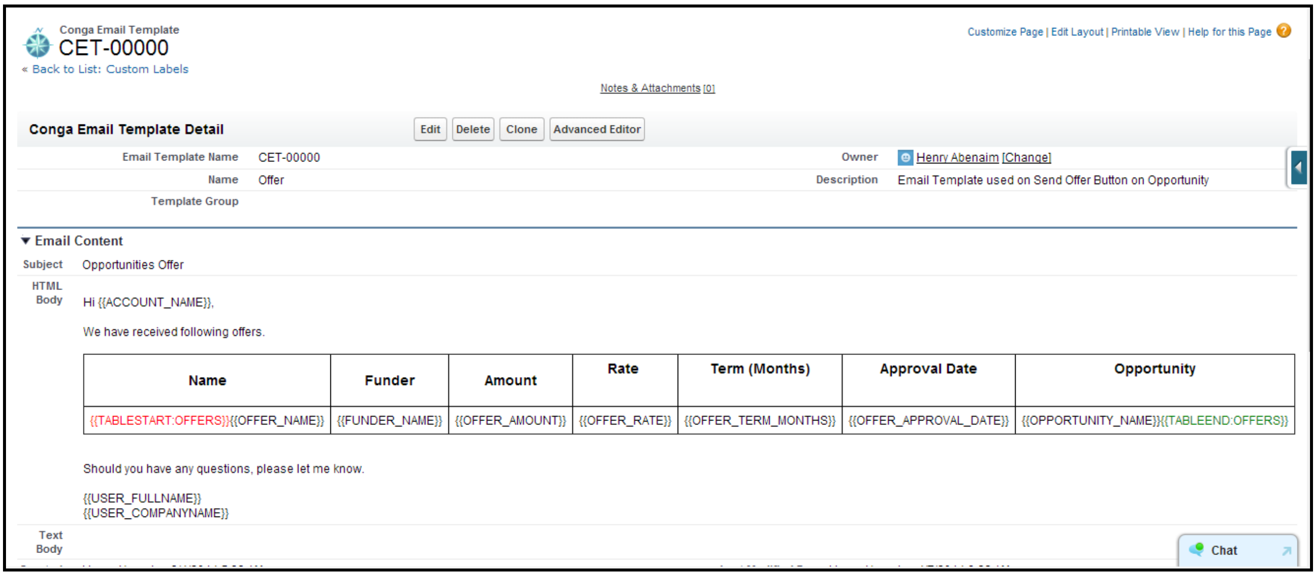

Figure 37 – Offer Email Template

- **Funding Application Template**
  - Create Funding Application Email Template as shown in *Figure 38.*

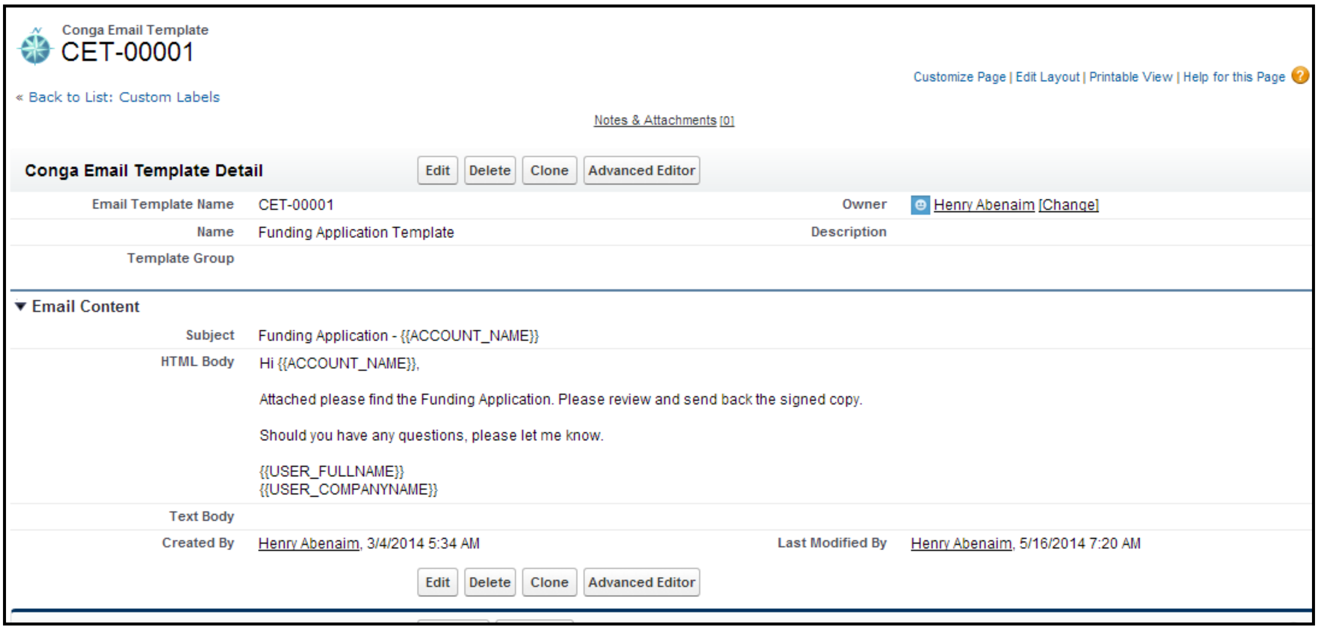

Figure 38 – Funding Application Conga Email Template

15 Conga Queries Configuration

- **Applicable only if there is Conga in the Org.**
  - Offer Query
    - Used in Send Offer functionality.
    - Create a Conga Query with Name as 'Offer'.
    - Steps:

1) Click **Conga Query Builder.**

Figure 39 – Conga Query Builder button on Conga Query

2) Create Query as shown in *Figure 40.*

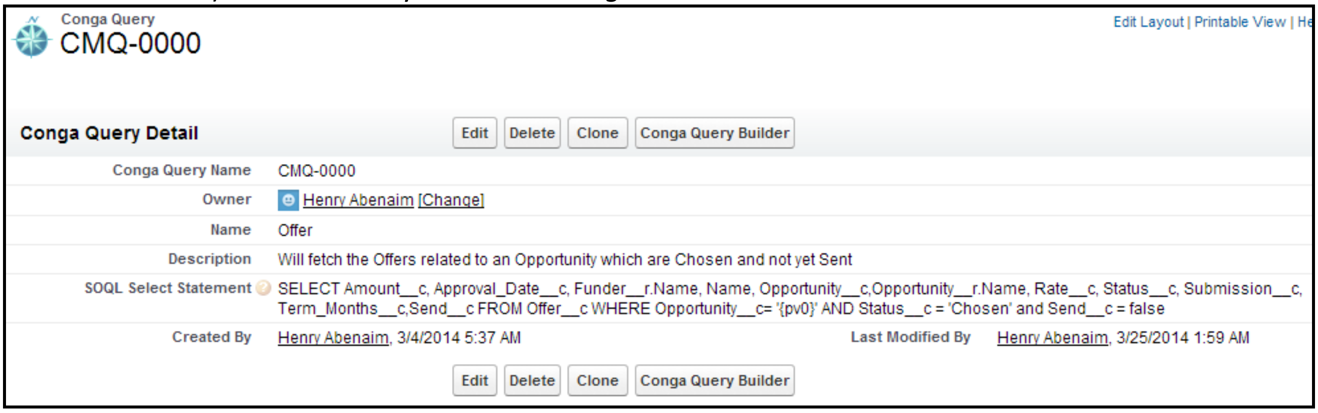

Figure 40 – Offer Conga Query

NOTE – The field names will change in the query, append the Package prefix with the fields

- Owner1 Query
  - Used in Funding Application PDF.
  - Create a Conga Query as shown below.

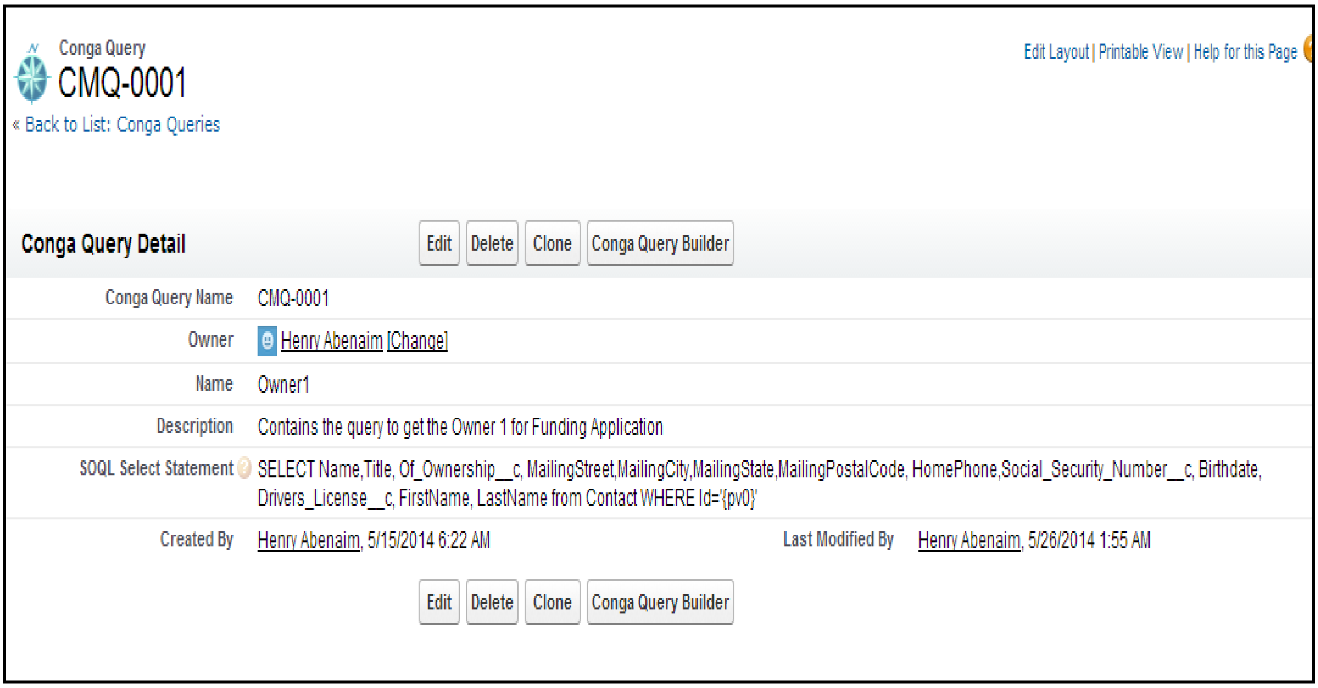

Figure 41 – Owner1 Conga Query

- Owner2 Query
  - Create a Conga Query as following Query.

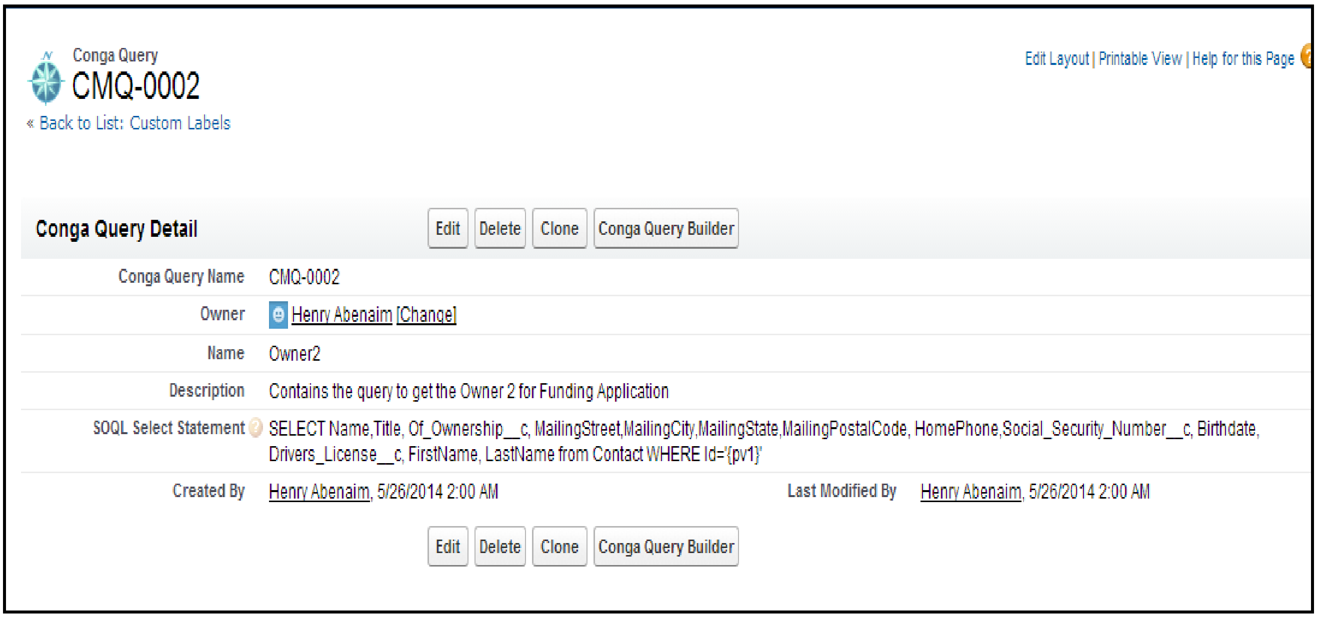

Figure 42 – Owner2 Conga Query