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This is the setup guide for Territory Plan Pro. It is a sales planning app that works within Salesforce.com. It enables sales teams to create and implement strategic territory plans that help them improve their sales results. Further, it provides reporting and dashboards to track and guide progress.

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For Upgrades, contact us for our Upgrade Guide.

VERY IMPORTANT for Salesforce.com Enterprise and Unlimited editions: see installation instructions on page 2.

1. Install the Application

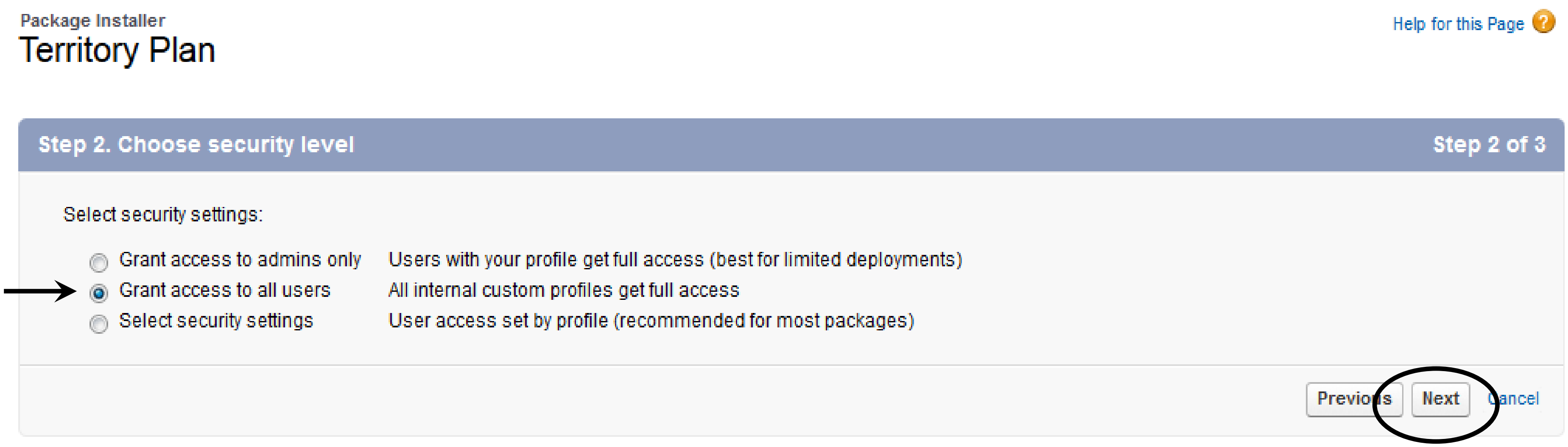
Installing the Application

Click “Get It Now” on the AppExchange or paste the link you were given into your browser window.
In “Package Installation Details,” click continue.
In “Package Installer,” click next; bottom right.

For Salesforce.com Enterprise and Unlimited editions. For professional edition, there will only be one choice; select it.

In “Package Installer” 2nd screen, select the 2nd radio button: Grant access to all users. See below. Click next; bottom right. See image below.
This will have the app automatically set up permissions for all the objects for your users. However, once you purchase licenses, you will have control over which users you give the license to. Users without a license will not have access to the app.

In “Package Installer” 3rd screen, click install.



2. Set Up Custom Profile

For Enterprise, Unlimited Edition only:
There are a number of custom objects that need to be enabled.

Custom Profile for Custom Objects
If you are using a standard (out of the box) user profile, you will need to clone it to be able to enable custom objects in that profile.
To clone a profile, go to Setup -> Manage users -> Profiles ->
Click on the name of the profile to clone
At the top, click Clone
Type in profile name, i.e. “custom sales rep” and Save

Assign Custom Profile to Desired Users
If you are using a standard (out of the box) user profile, you will need to clone it to be able to enable custom objects in that profile.
Go into Set up -> Manage users -> Users
Click on name of user
In User screen, click Edit
On the right, in Profile, select desired Profile and Save

3. Set Permissions

For Enterprise, Unlimited Edition only:

There are a number of custom objects that need to be enabled.

Set up Permissions

Go into Set up -> Manage users -> Profiles ->

Select the profile for the users of Territory Plan Pro (i.e. custom sales rep)

Toward the bottom, find the section: **Custom Object Permissions:**

Enable read, create, edit and delete for the following objects:

Partners in your territory
Target Opportunities
Target Accounts
Territory Plans
My Top Current Accounts
Opportunities with Current Accounts
Strategies
Strength, Weakness, Opportunity, Threat

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Account Channel Partners	✓	✓	✓	✓	✓	✓
AccountPlans	✓	✓	✓	✓	✓	✓
Account Relationships	✓	✓	✓	✓	✓	✓
Account Team	✓	✓	✓	✓	✓	✓
Associated Opportunities	✓	✓	✓	✓	✓	✓
Licenses	✓	✓	✓	✓	✓	✓
Opportunities with Current Accounts	✓	✓	✓	✓	✓	✓
Packages	✓	✓	✓	✓	✓	✓

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Package Versions	✓	✓	✓	✓	✓	✓
Partners in your territory	✓	✓	✓	✓	✓	✓
Strategies	✓	✓	✓	✓	✓	✓
Strength, Weakness, Opportunity, Threat	✓	✓	✓	✓	✓	✓
Target Accounts	✓	✓	✓	✓	✓	✓
Target Opportunities	✓	✓	✓	✓	✓	✓
TerritoryPlans	✓	✓	✓	✓	✓	✓
My Top Current Accounts	✓	✓	✓	✓	✓	✓

3. Set Permissions

For Enterprise, Unlimited Edition only:

If you use the Enhanced User Interface, it will look as below.

Go into set up -> Manage users -> Profiles -> Select the profile for the users of Account Plan Pro (i.e. Custom Sales Rep below)

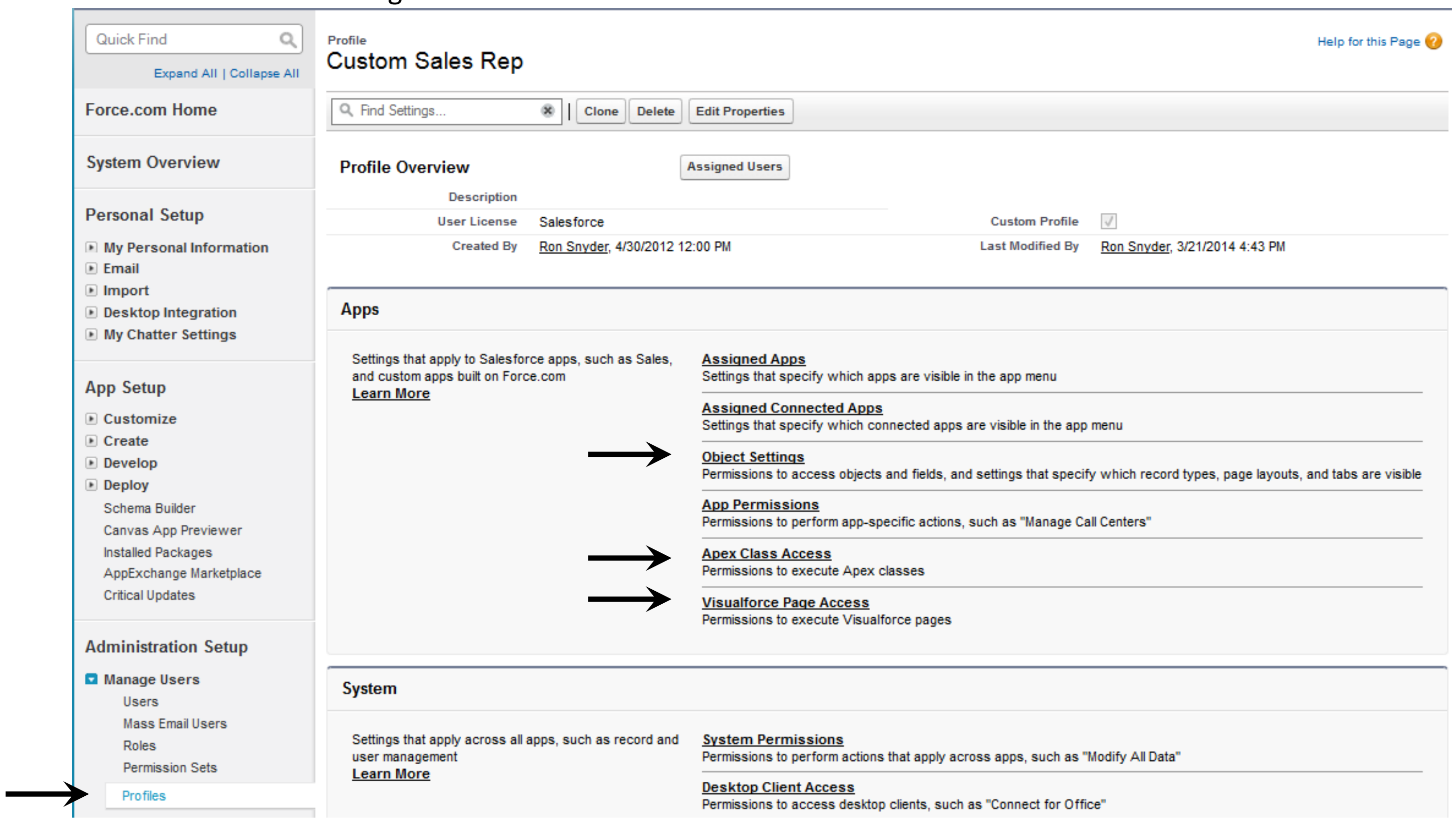
Click Object Settings -> Check that all Account Plan Objects have Read, Create, Edit, Delete Permissions.

If they do not, click each one, then click edit and check the Read, Create, Edit, Delete check boxes.

Click Apex Class Access -> Click Edit -> Make sure all Apex Classes starting with Plan2Win are selected and in the box on the right.

Click Visual Force Page Access -> Click Edit -> Make sure all Visual Force Pages starting with Plan2Win are selected in the box on the right.

Click Save after each of the changes above.



4. Enable Visualforce Page Access

For Enterprise, Unlimited Edition only:

On the same page; lower down, find the section: **Enabled Visualforce Page Access and Click Edit.**

Enabled Visualforce Page Access Edit Enabled Visualforce Page Access Help ?

Visualforce Page Name	AppExchange Package Name
Plan2Win.NewChannelPartner	Territory Plan
Plan2Win.NewOpportunityCurrentAccount	Territory Plan
Plan2Win.NewOpportunityTargetAccount	Territory Plan
Plan2Win.NewSWOT	Territory Plan
Plan2Win.NewStrategy	Territory Plan
Plan2Win.NewTargetAccount	Territory Plan
Plan2Win.NewTopAccount	Territory Plan
Plan2Win.TerritoryPlanPDF	Territory Plan
Plan2Win.TerritoryPlanViewPage	Territory Plan

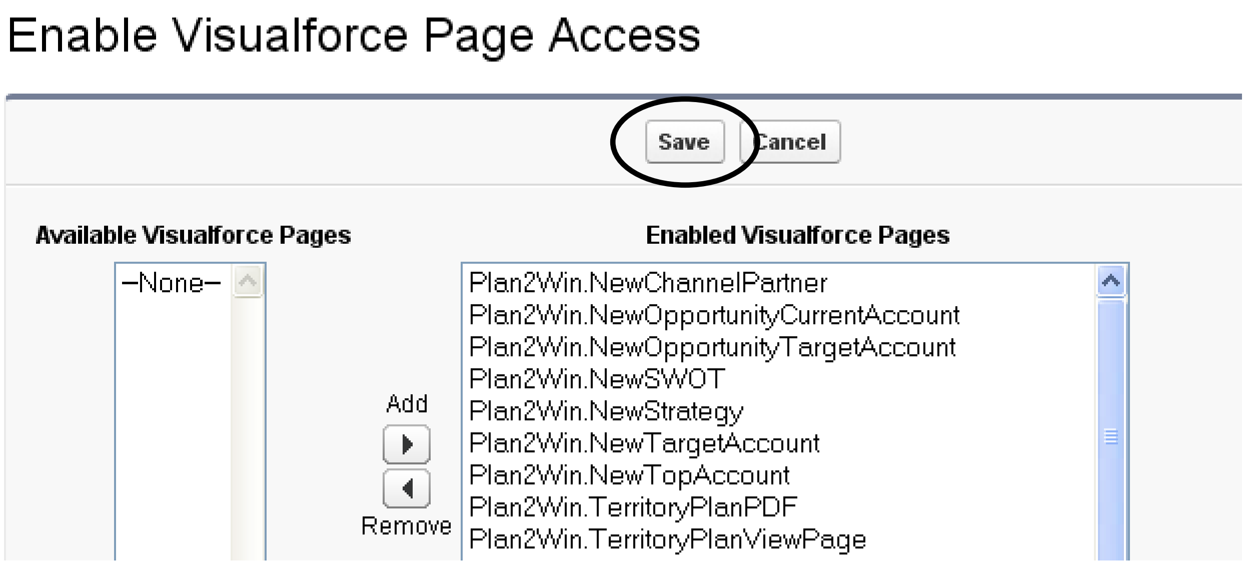
Add these items from the left Available Visual Force Pages to the right Enabled Visualforce Pages and Save.

Plan2Win.NewChannelPartner
Plan2Win.NewOpportunityCurrentAccount
Plan2Win.NewOpportunityTargetAccount
Plan2Win.NewTargetAccount
Plan2Win.NewTopAccount
Plan2Win.TerritoryPlanPDF
Plan2Win.NewSWOT
Plan2Win.NewStrategy

See next page.

4. Enable Visualforce Page Access

For Enterprise, Unlimited Edition only:



5. Manage Licenses/ Set up Users

Not for Trial installations.

What: **Set up users.**

How: Go to your name -> Set up
Under Deploy, click Installed Packages
In the Installed Packages table, find the package name

To the left of the package name, click Manage Licenses
Select users to apply licenses to.

Also, this screen shows you the version number of the application installed.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date
Uninstall | Manage Licenses	Territory Plan	Plan 2 Win Software, LLC	4.1	Plan2Win	Active	2	0	5/2/2014	5/1/2013 10:57 AM
	Description Territory Plan Pro for Salesforce is an integrated application for the creation of a territory strategy and sales plan for your sales people. This app...								

6. Add the TerritoryPlans Tab

Customize your tabs so that Territory Plan Pro is a tab.

This should be done for or by each user.

What: **Add the "TerritoryPlans" Tab to your Salesforce instance.**

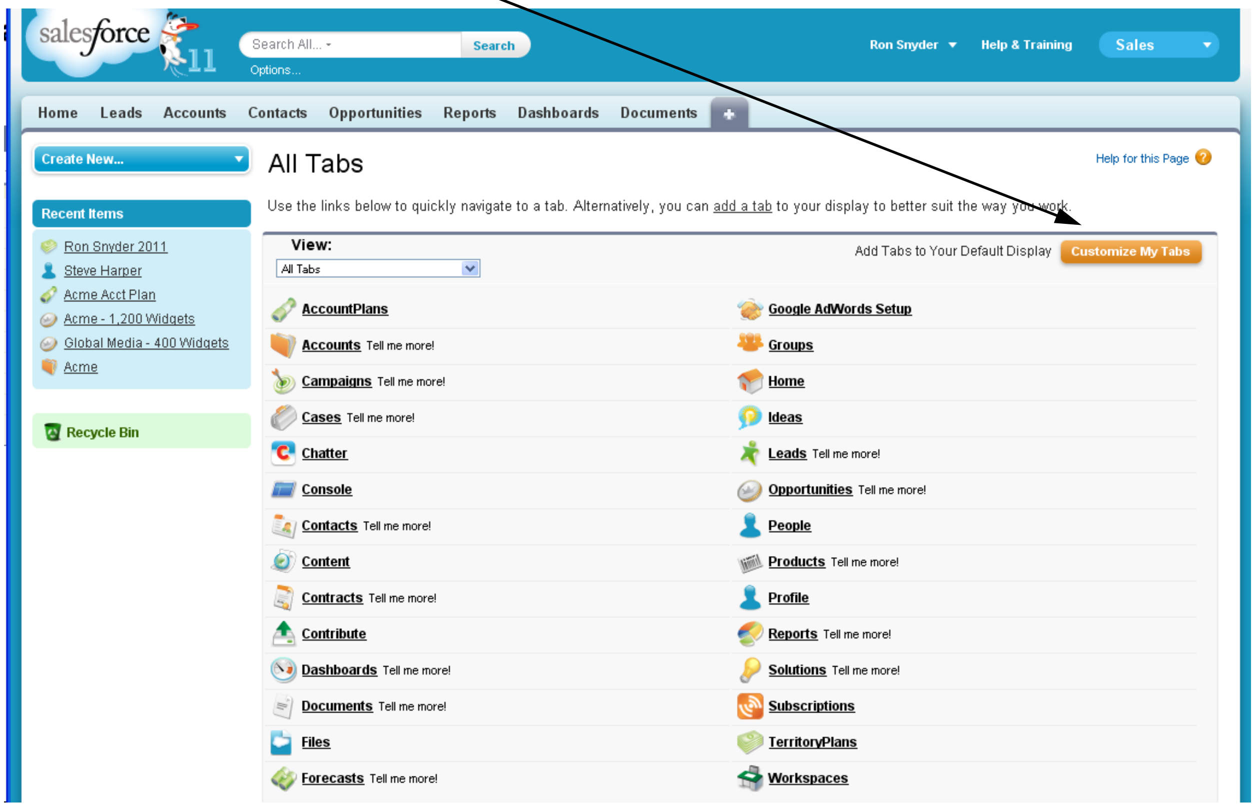
Why: One click access to creation and review of Territory Plans for the Sales user and manager.

How: Add the Custom Tab (see graphics on next two pages)

From any screen, click on "**Tabs**" icon (+)

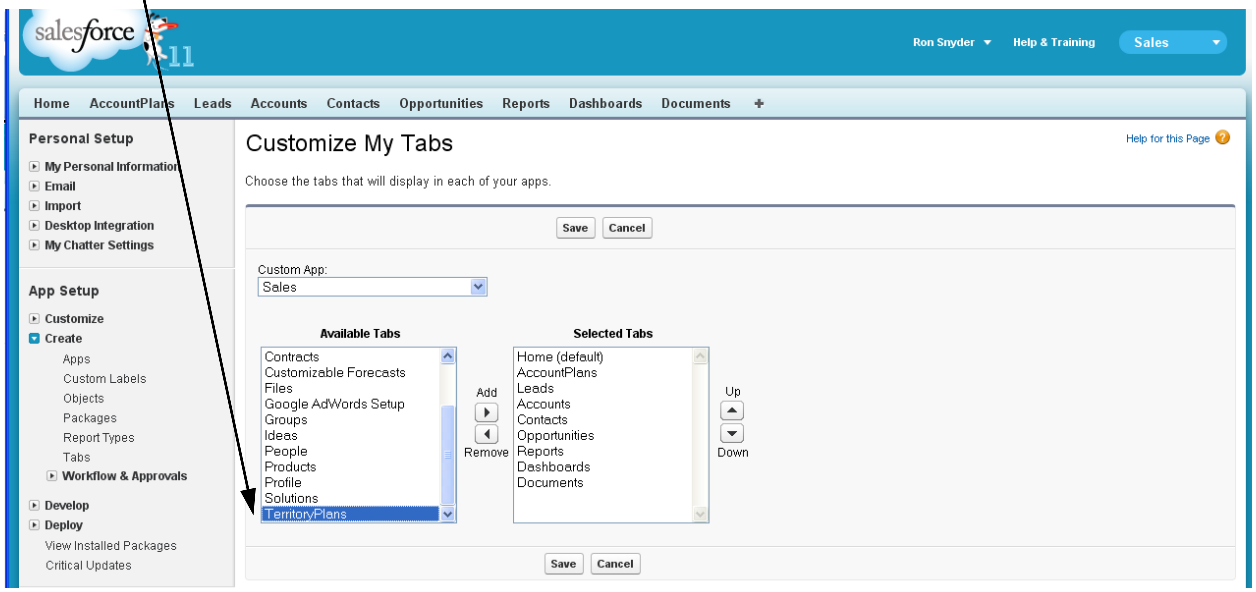
6. Add the TerritoryPlans Tab

Select **Customize My Tabs**



6. Add the TerritoryPlans Tab

Select **TerritoryPlans, Add, Save**

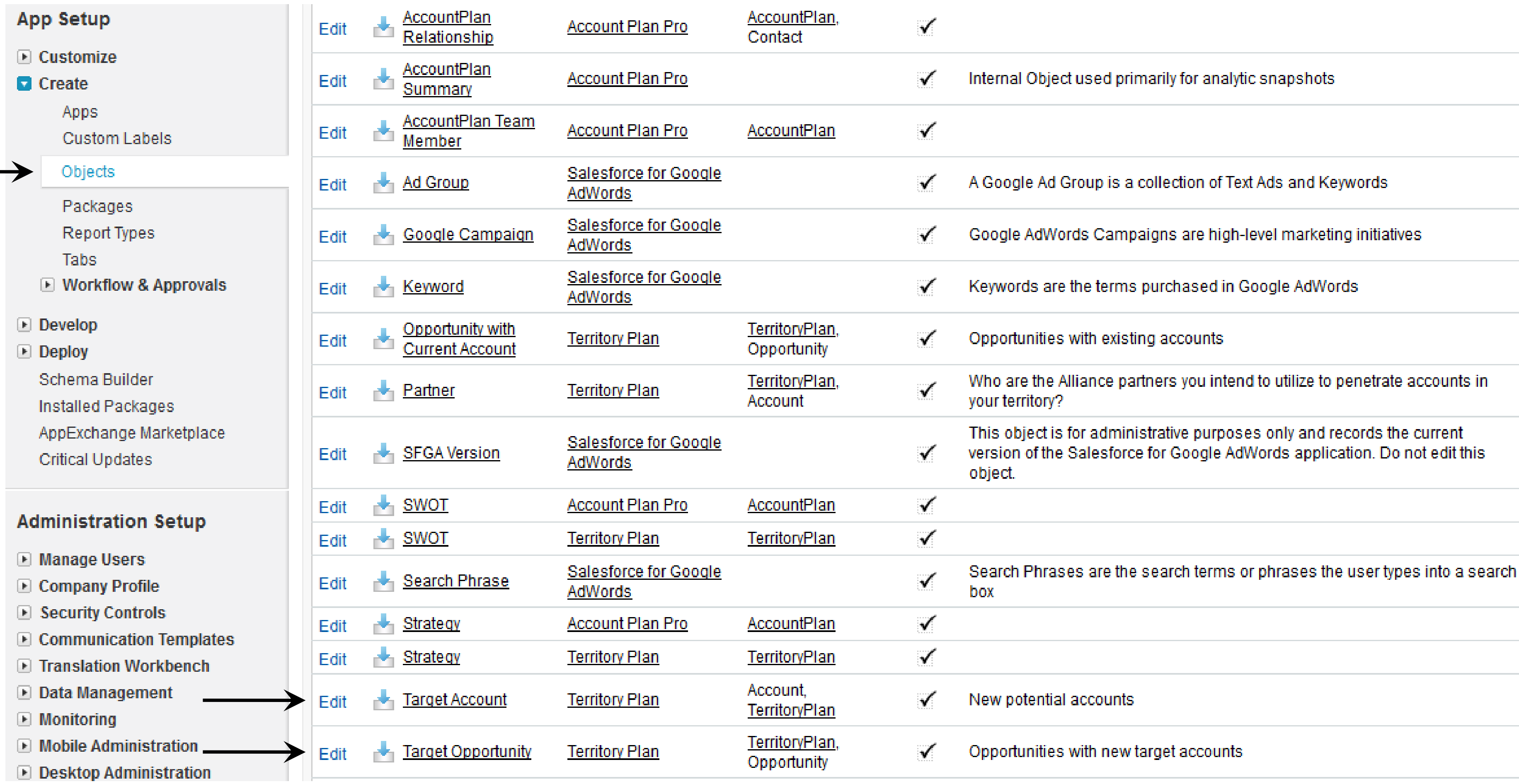


Showing tabs
If Territory Plan Tab is not showing up, do this and then repeat the steps above.

Setup -> Administration Setup -> Manage Users -> Profiles ->
Click on the appropriate Profile -> click Edit -> scroll down to Tab Settings ->
Custom Tab Settings -> Territory Plans -> select Default On.

7. Set up Objects for Reports and Dashboards

Set up -> create -> objects ->
Click edit to the left of TargetAccount and then TargetOpportunity



Edit	AccountPlan Relationship	Account Plan Pro	AccountPlan, Contact	✓	
Edit	AccountPlan Summary	Account Plan Pro		✓	Internal Object used primarily for analytic snapshots
Edit	AccountPlan Team Member	Account Plan Pro	AccountPlan	✓	
Edit	Ad Group	Salesforce for Google AdWords		✓	A Google Ad Group is a collection of Text Ads and Keywords
Edit	Google Campaign	Salesforce for Google AdWords		✓	Google AdWords Campaigns are high-level marketing initiatives
Edit	Keyword	Salesforce for Google AdWords		✓	Keywords are the terms purchased in Google AdWords
Edit	Opportunity with Current Account	Territory Plan	TerritoryPlan, Opportunity	✓	Opportunities with existing accounts
Edit	Partner	Territory Plan	TerritoryPlan, Account	✓	Who are the Alliance partners you intend to utilize to penetrate accounts in your territory?
Edit	SFGA Version	Salesforce for Google AdWords		✓	This object is for administrative purposes only and records the current version of the Salesforce for Google AdWords application. Do not edit this object.
Edit	SWOT	Account Plan Pro	AccountPlan	✓	
Edit	SWOT	Territory Plan	TerritoryPlan	✓	
Edit	Search Phrase	Salesforce for Google AdWords		✓	Search Phrases are the search terms or phrases the user types into a search box
Edit	Strategy	Account Plan Pro	AccountPlan	✓	
Edit	Strategy	Territory Plan	TerritoryPlan	✓	
Edit	Target Account	Territory Plan	Account, TerritoryPlan	✓	New potential accounts
Edit	Target Opportunity	Territory Plan	TerritoryPlan, Opportunity	✓	Opportunities with new target accounts

7. Set up Objects for Reports and Dashboards

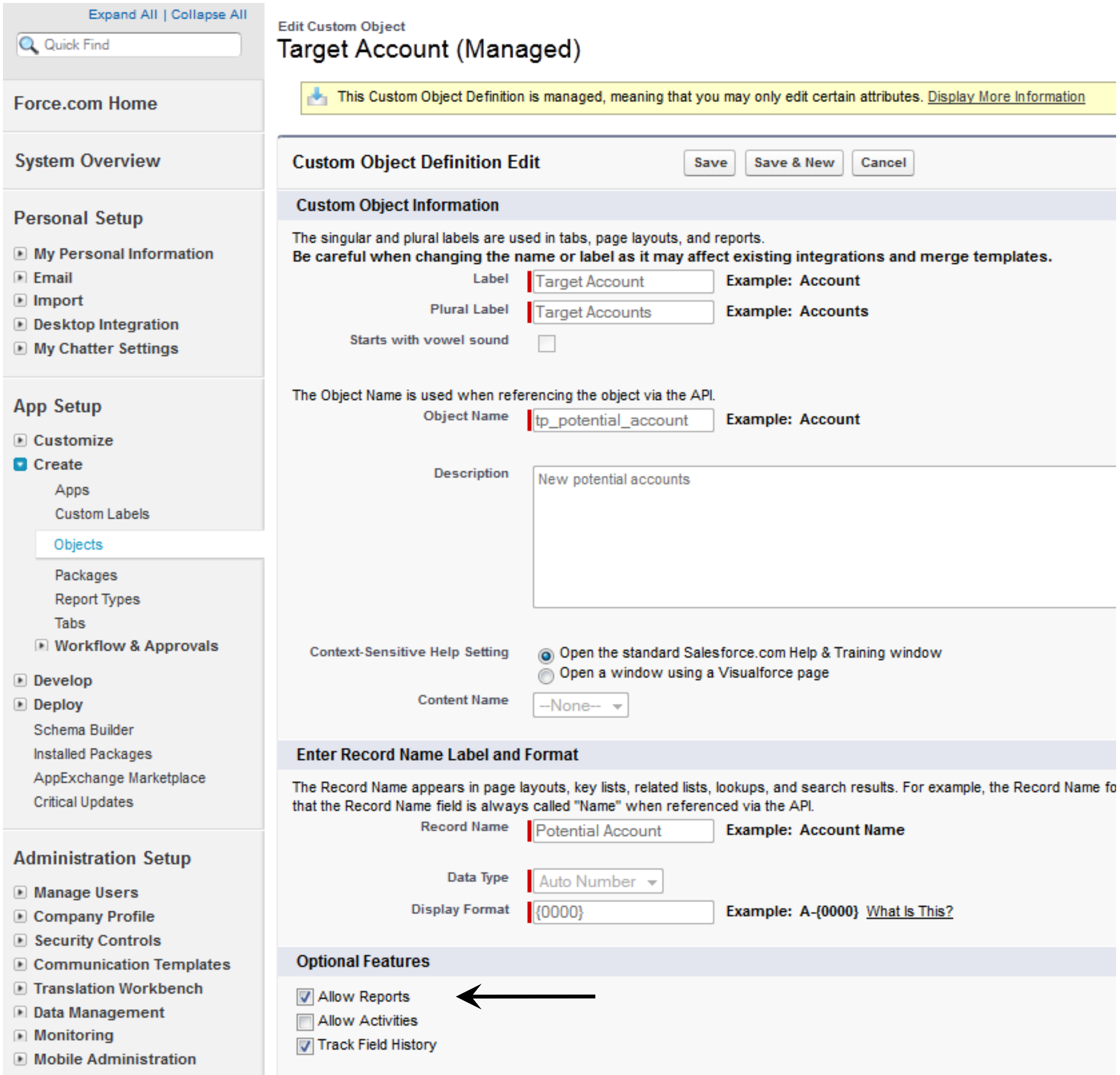
Bottom of page: optional features ->

Verify “Allow Reports” is enabled.

If not, click “Allow Reports.”

Save

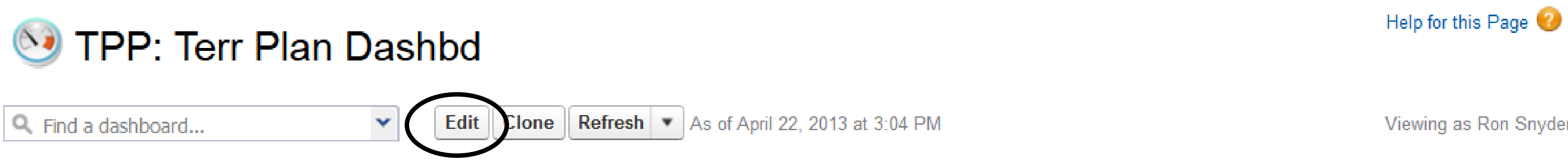
Do this for both objects:
TargetAccount and TargetOpportunity



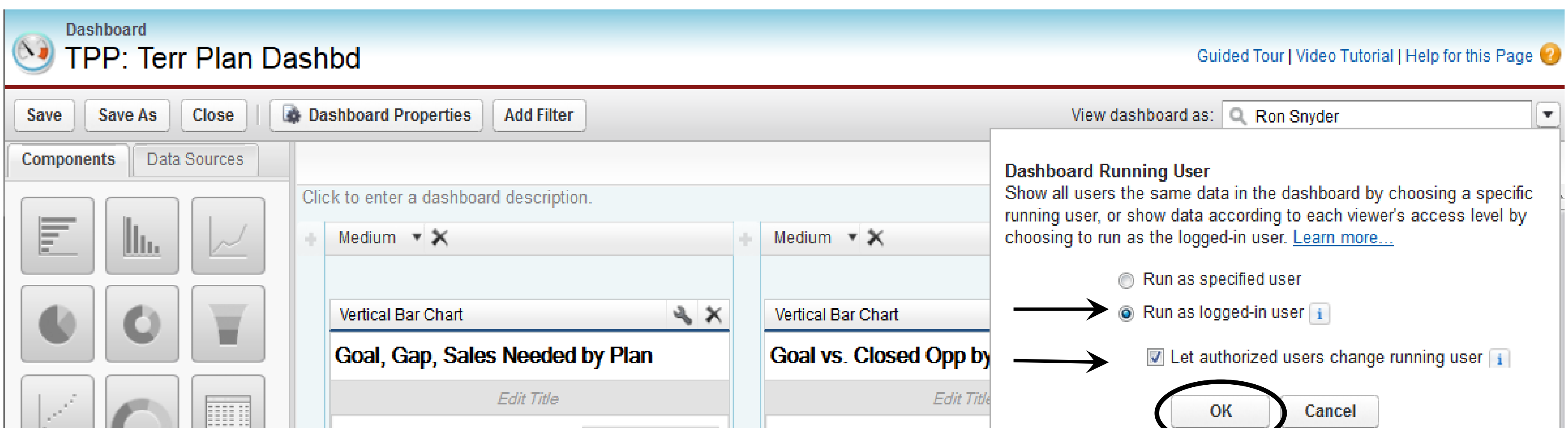
8. OPTIONAL: Set up Dashboard

Optional: For Enterprise, Unlimited Edition only:
If users are having a problem viewing the dashboard, do this.

Login as the Salesforce.com admin, and make the following change:
Go to dashboards -> Terr Plan Dashboard
Click edit



On the far right you will see: “view dashboard as:”
Click the down arrow on the right side and select: "Run as logged in user"
You can also, check the box: “let authorized users change running user” if you want. Click OK.



9. OPTIONAL: Set Privacy Settings

Set the Organization Wide Defaults for the Territory Plan Pro object to make plans:

Public= everyone can see each other's plans.

Private= people can only see their own plan or see plans in your hierarchy- if you "grant access using hierarchy."

Click ***Your Name*** | **Setup** | **Security Controls** | **Sharing Settings**.

Click **Edit** in the Organization-Wide Defaults area.

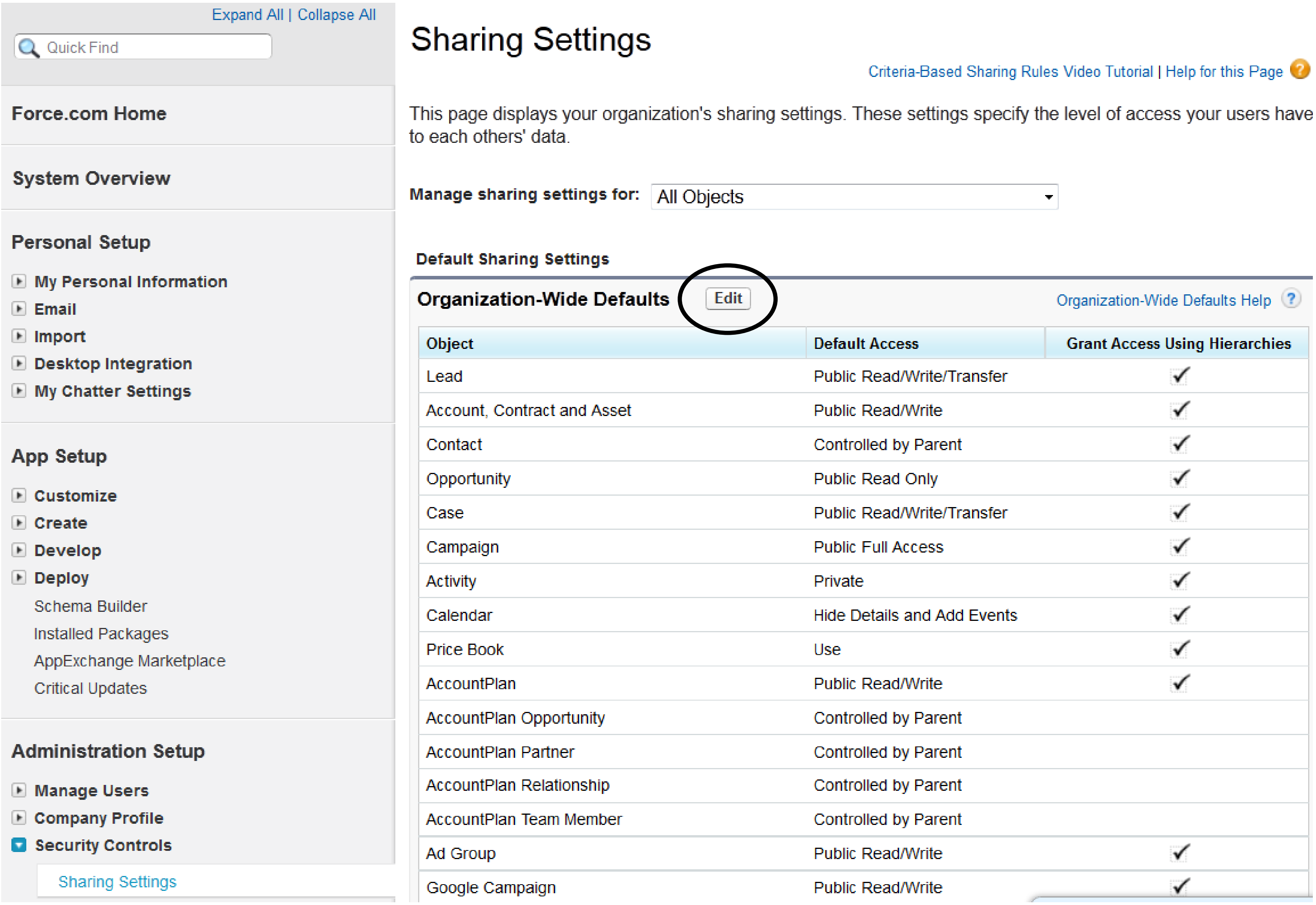
For each object, select the access you want to use.

To enable automatic access to plans using your hierarchies, select **Grant Access Using Hierarchies** for Territory Plan Pro.

The default is that this is enabled.

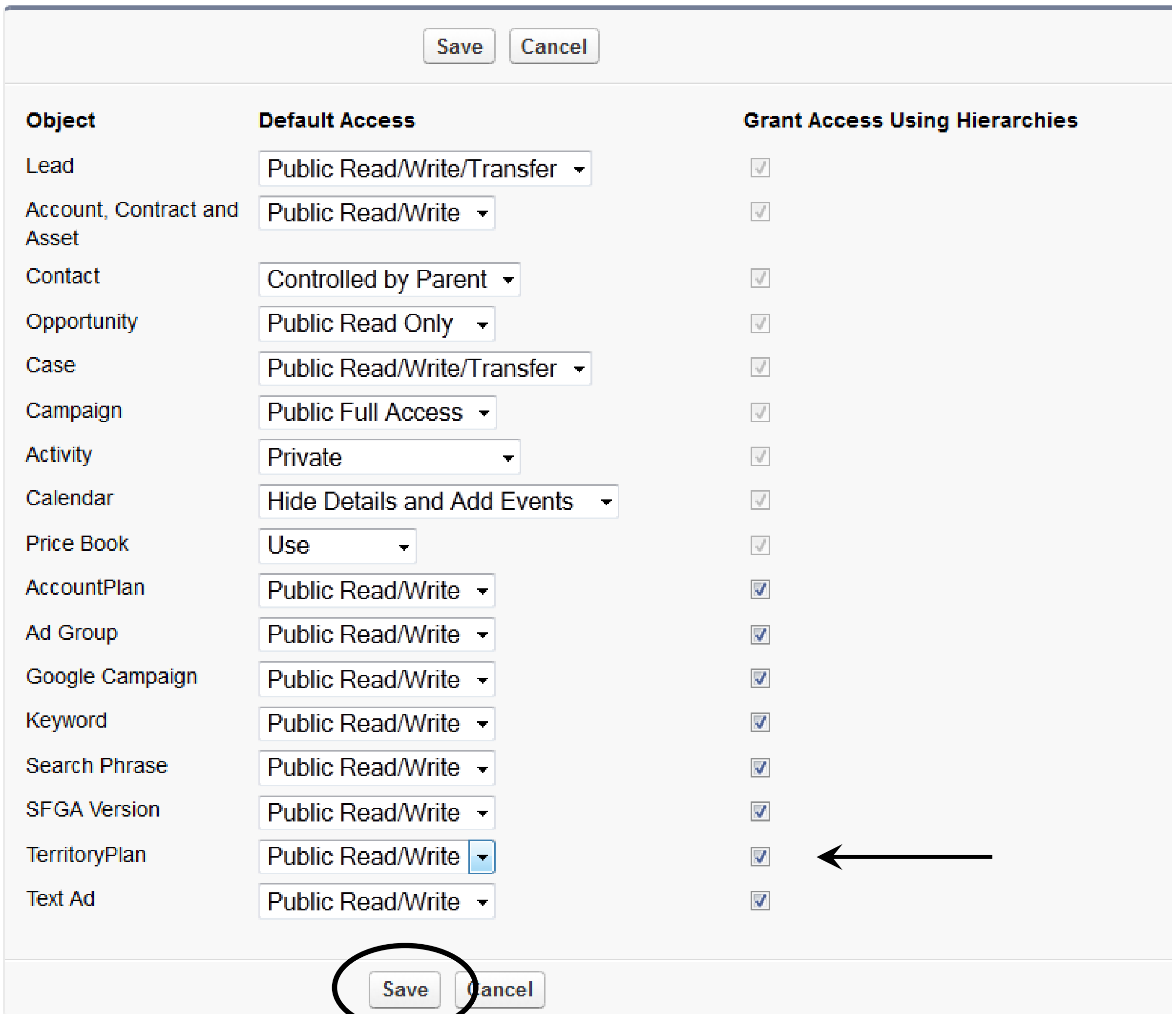
See graphics that follow.

9. OPTIONAL: Set Privacy Settings



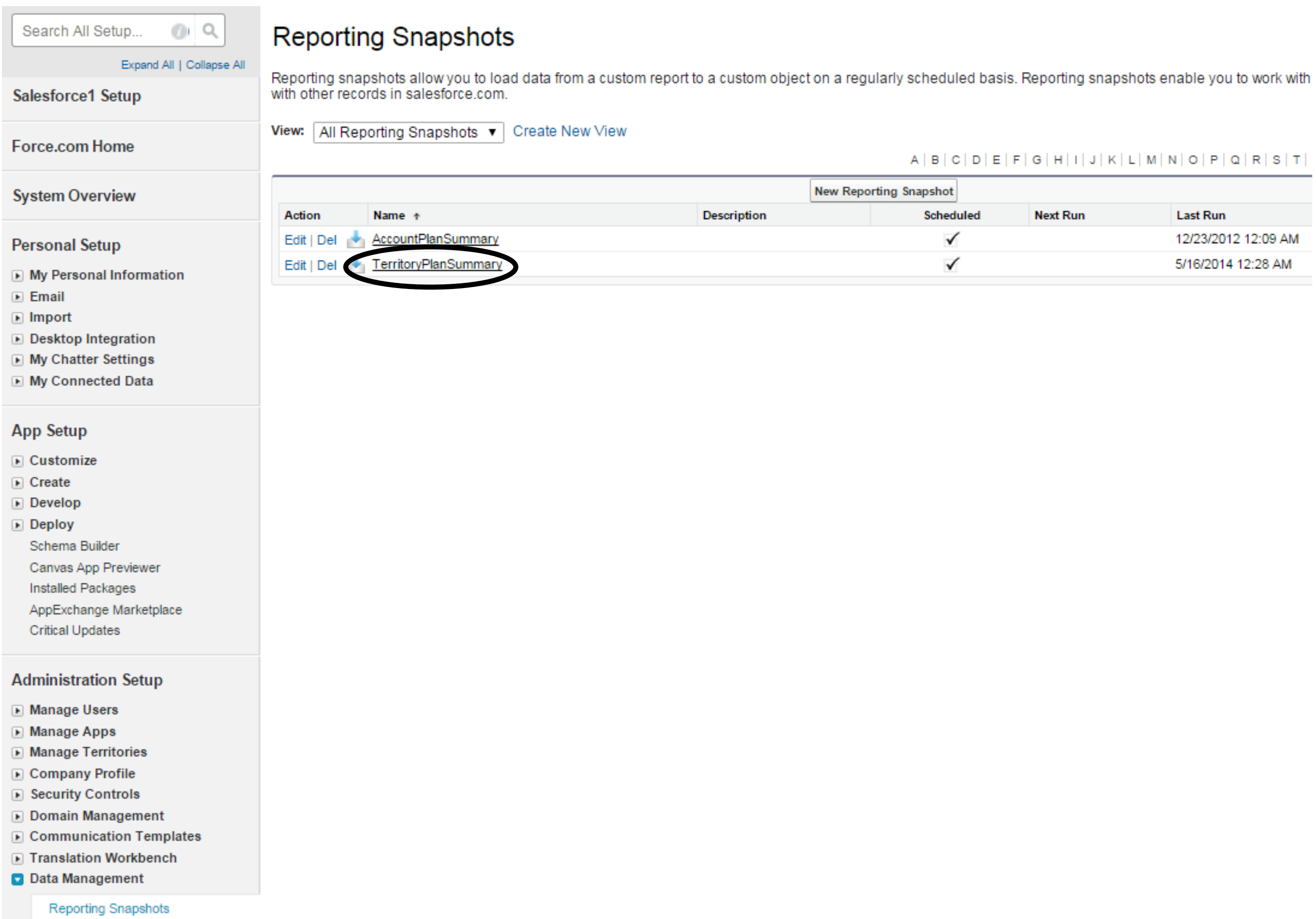
9. OPTIONAL: Set Privacy Settings

To the right of TerritoryPlan, Select Public Read/Write, Public Read or Private… and “Grant Access Using Hierarchy” per your preference.



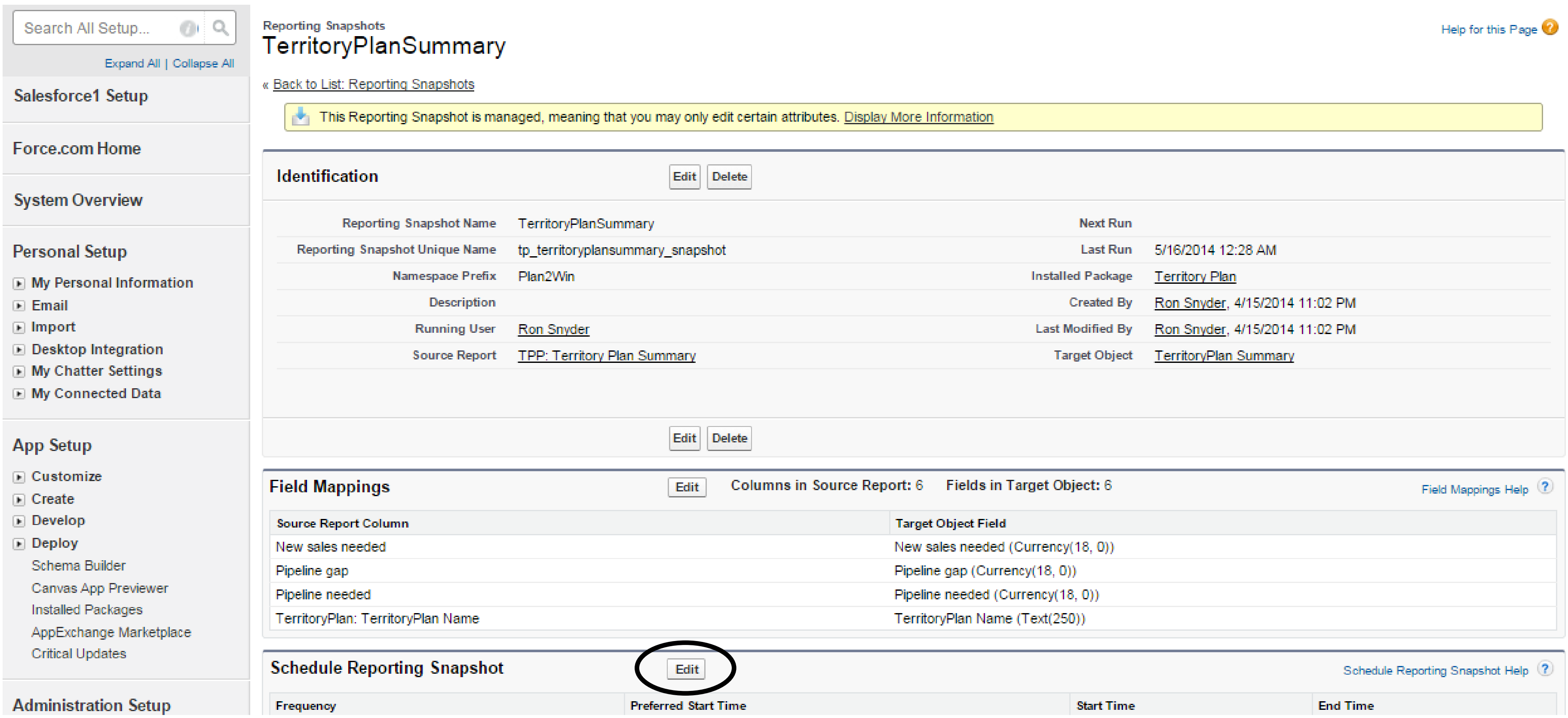
10. OPTIONAL: Set Up Reporting Snapshot

Optional: If you are upgrading from rev 2 to 3, you must update plans first (see Upgrade Guide).
This Reporting Snapshot captures the progress of Territory Plan variables: Sum of Sales Needed, Pipeline Needed and Pipeline Gap over time.
Setup -> Administration Setup -> Data Management -> Reporting Snapshot
Click Territory Plan Summary



10. OPTIONAL: Set Up Reporting Snapshot

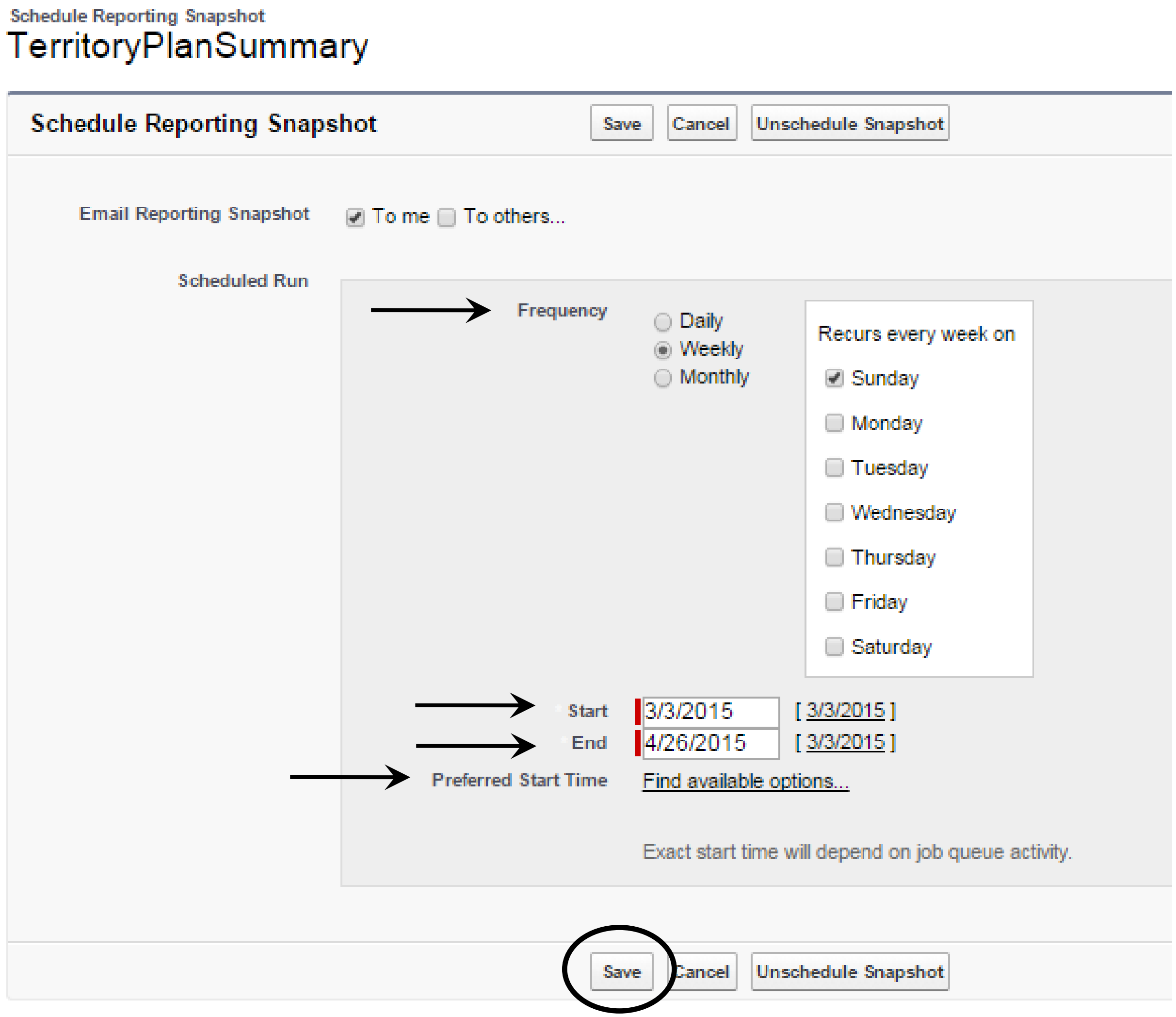
Optional: Scroll to Schedule Reporting Snapshot -> click Edit



10. OPTIONAL: Set Up Reporting Snapshot

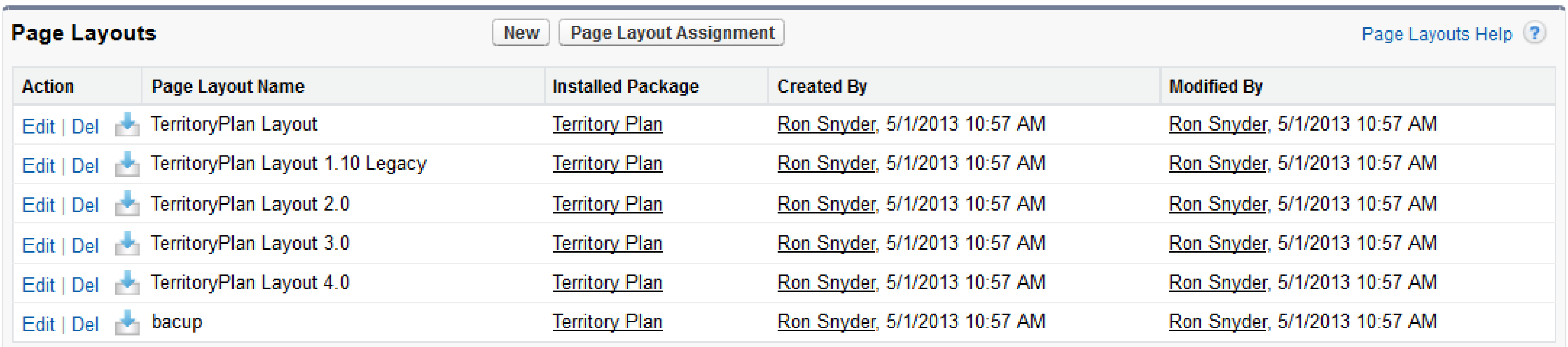
Optional: Select Frequency and start and end dates

Preferred Start Time: click show available. Select the time Salesforce.com gives you
Save



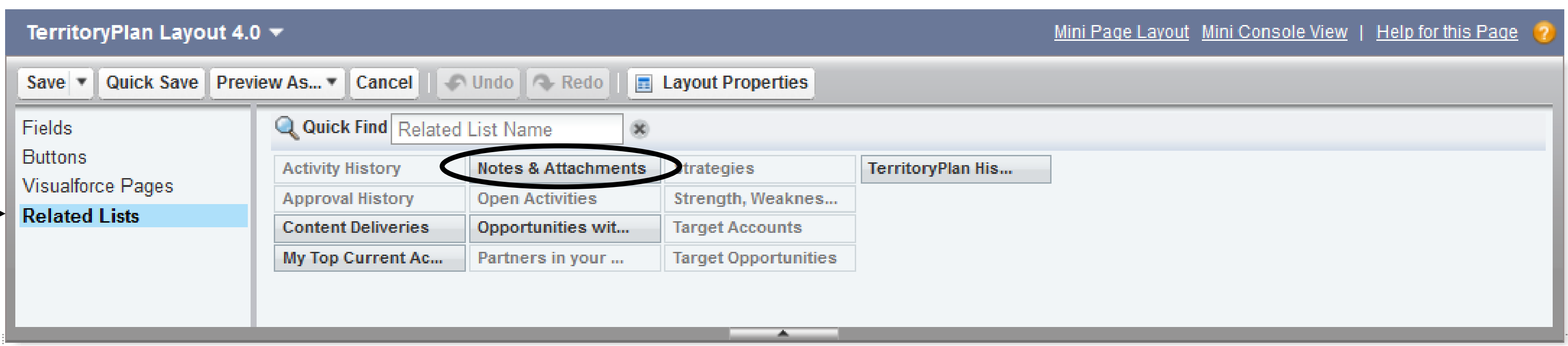
11. OPTIONAL: Attach Files to Plan

Optional: To set up to attach files to plans:
Setup -> create -> objects
Click on TerritoryPlan -> edit
In Enterprise, Unlimited Edition:
Scroll down to page layouts -> edit the most recent TerritoryPlan layout.
In Professional Edition: there is only one Account Plan Layout. Click Edit to the left of it.


Page Layouts

Action	Page Layout Name	Installed Package	Created By	Modified By
Edit | Del	TerritoryPlan Layout	Territory Plan	Ron Snyder, 5/1/2013 10:57 AM	Ron Snyder, 5/1/2013 10:57 AM
Edit | Del	TerritoryPlan Layout 1.10 Legacy	Territory Plan	Ron Snyder, 5/1/2013 10:57 AM	Ron Snyder, 5/1/2013 10:57 AM
Edit | Del	TerritoryPlan Layout 2.0	Territory Plan	Ron Snyder, 5/1/2013 10:57 AM	Ron Snyder, 5/1/2013 10:57 AM
Edit | Del	TerritoryPlan Layout 3.0	Territory Plan	Ron Snyder, 5/1/2013 10:57 AM	Ron Snyder, 5/1/2013 10:57 AM
Edit | Del	TerritoryPlan Layout 4.0	Territory Plan	Ron Snyder, 5/1/2013 10:57 AM	Ron Snyder, 5/1/2013 10:57 AM
Edit | Del	bacup	Territory Plan	Ron Snyder, 5/1/2013 10:57 AM	Ron Snyder, 5/1/2013 10:57 AM

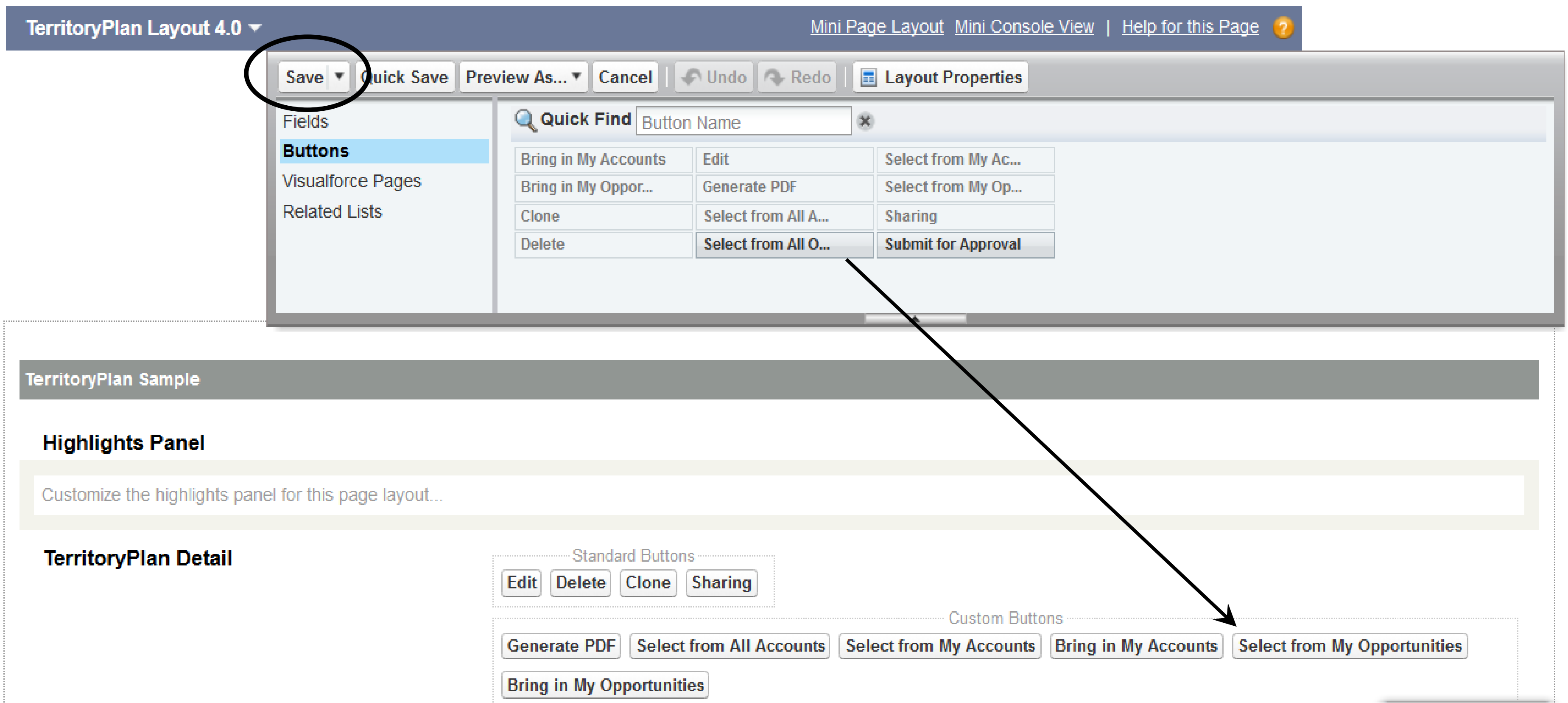
Click on related lists and drag notes an attachment to where you want them to be in the layout. Click Save



12. OPTIONAL: Update Buttons

Optional: Update Buttons to add “Select from All Opportunities” button.
If your permissions are set up in a typical manner, do not use “Select from All Opportunities” as the user will receive an error if they try to bring in an opportunity that they do not have read and write permissions for. See the next topic for details on permissions and insufficient privileges errors.

Set up -> create -> objects -> click Territory Plan->Page Layout section->Edit current page layout (4.0).
On the left side of the Territory Plan Layout, select Buttons.
Drag “Select from All Opportunities” buttons into position on the page layout. Save.



13. NOTE: Permissions, Insufficient Privileges Errors

NOTE: Regarding "Select from All Opportunities" button and Insufficient Privileges Errors. Also see previous topic.

If your permissions are set up in a typical manner, do not use "Select from All Opportunities" as the user will receive an error if they try to bring in an opportunity that they do not have read and write permissions for.

If you want to enable users to include in their plans opportunities that they are not the owners of, use the "Select from All Opportunities" button as this will give them access to opportunities they are not the owners of. However, it is important that you set it up so that users have read and write permission/privileges for those opportunities. Again, should they try to bring in opportunities they do not have read and write privileges for, they will get an Insufficient Privileges Error. This is all based on Salesforce.com permissions, rather than our app.

The most likely positive intent for setting it up this way is to enable inclusion of other opportunities they are involved in but not the owner of. This would include opportunities with a headquarters account or other regional accounts that they do not own.

Further, if users have permission to read and write a territory plan and, within that plan, attempt to delete an opportunity that they do not own, they will receive an Insufficient Privileges Error.

14. OPTIONAL: Add Accounts and Opportunities from Account and Opportunity Pages

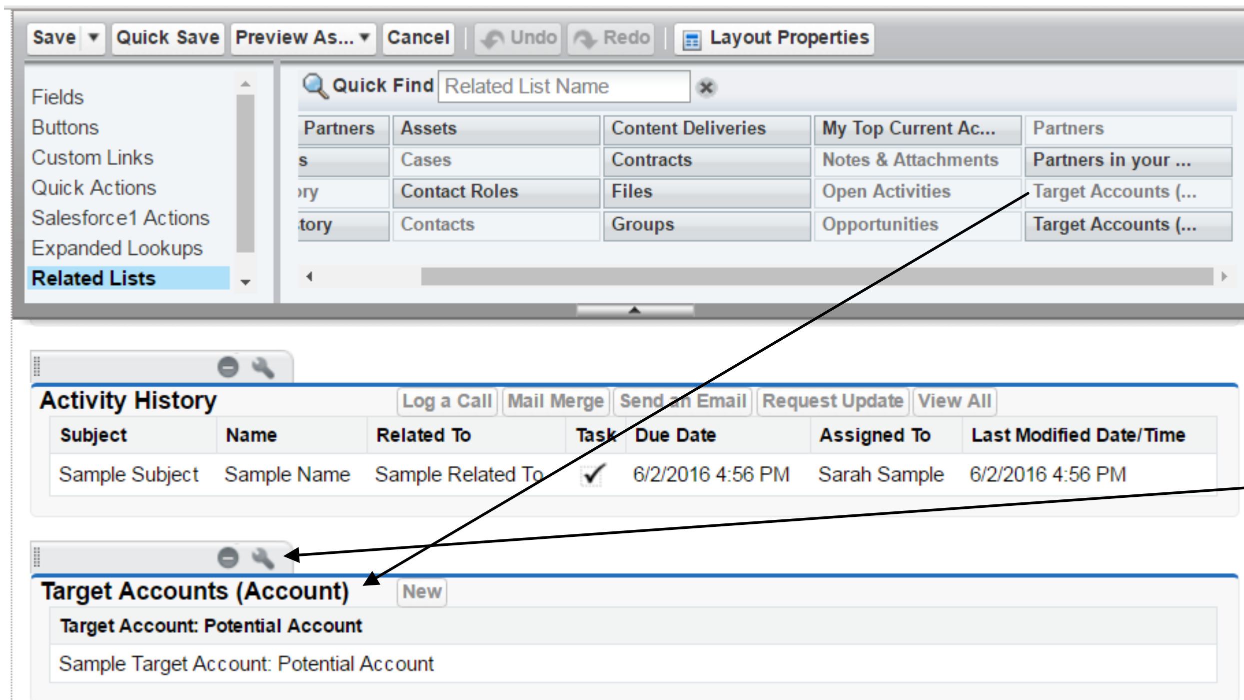
Optional: Add buttons to enable users to add Accounts from the Account Page and Opportunities from the Opportunity Page.

Add button to enable users to add Accounts from the Account Page.

Setup -> App Setup -> Customize -> Accounts -> Page Layouts

Click: Edit the Account Page Layout

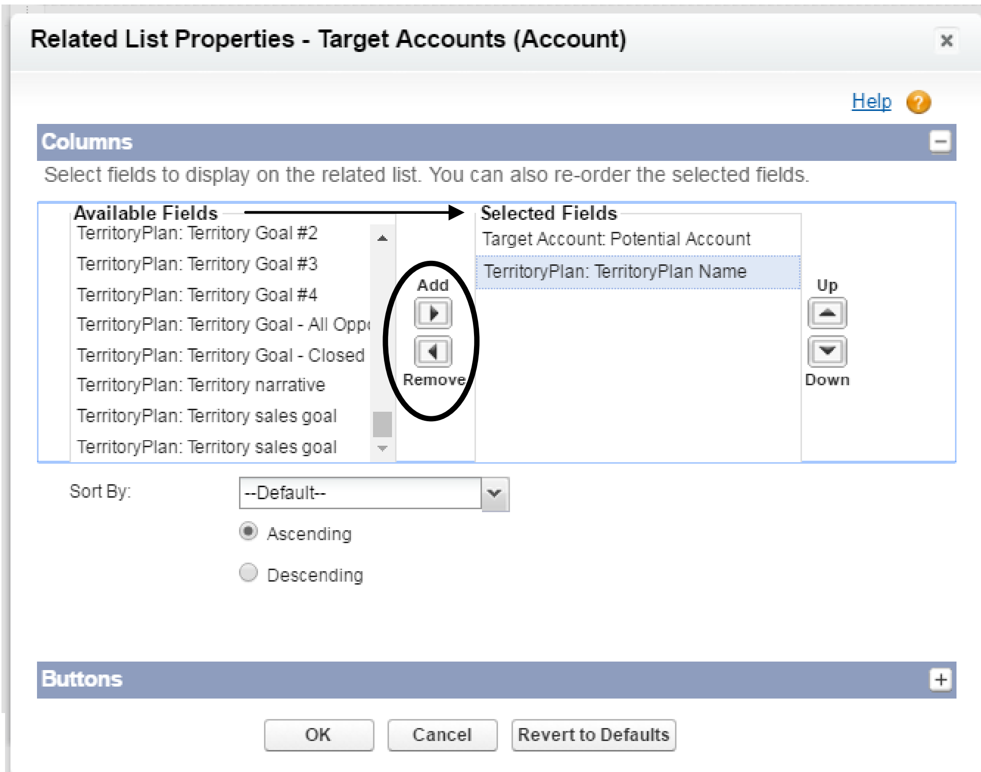
On the left side, select: Related Lists -> Drag and place the first Target Accounts button where you want it in the page layout.
Save.



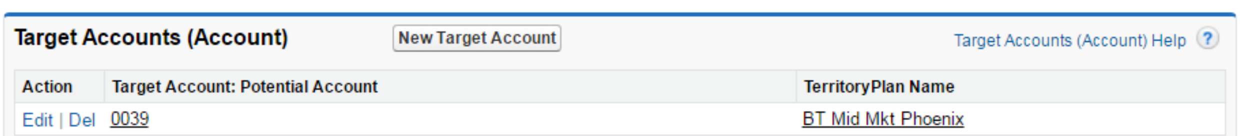
Add additional fields to the section by clicking the wrench in the Account Plan Opportunities section.

14. OPTIONAL: Add Accounts and Opportunities from Account and Opportunity Pages (continued)

After clicking the wrench, select available fields you want to include in the section by selectin the field and clicking “Add” then “Save.”



The Account page will now have this section in it. Users can add the account into the Territory Plan from the Account page using this section.



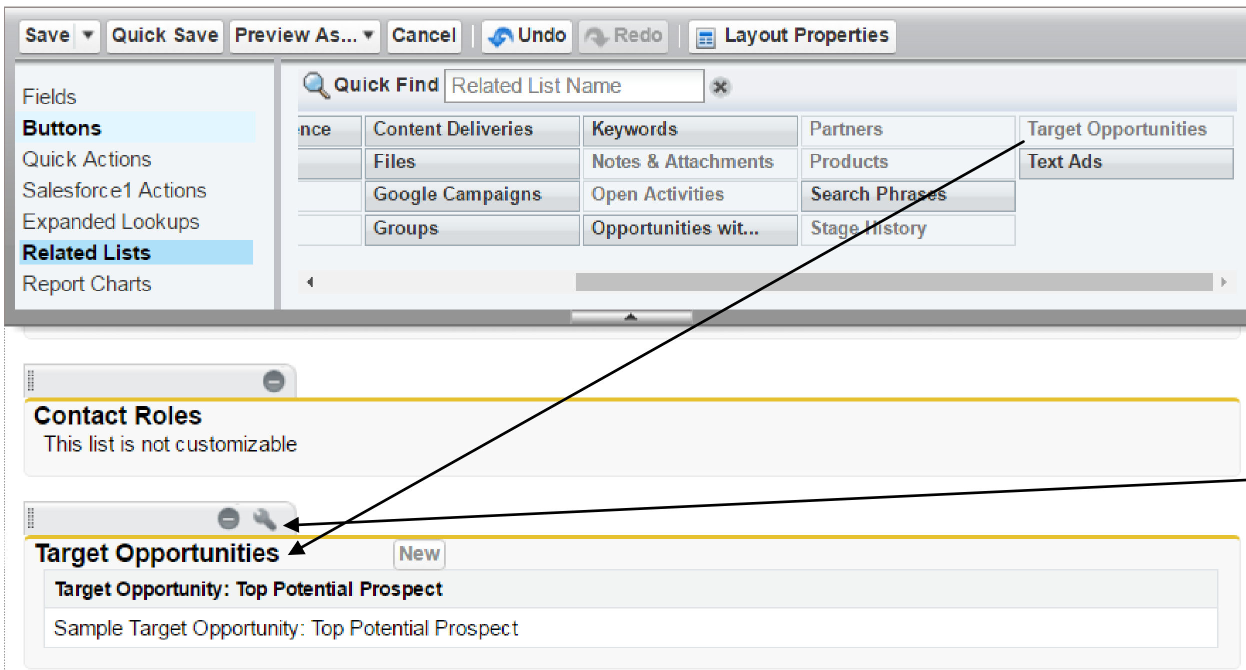
14. OPTIONAL: Add Accounts and Opportunities from Account and Opportunity Pages (continued)

Add button to enable users to add Opportunities from the Opportunity Page.

Setup -> App Setup -> Customize -> Opportunities -> Page Layouts

Click: Edit the Opportunity Page Layout

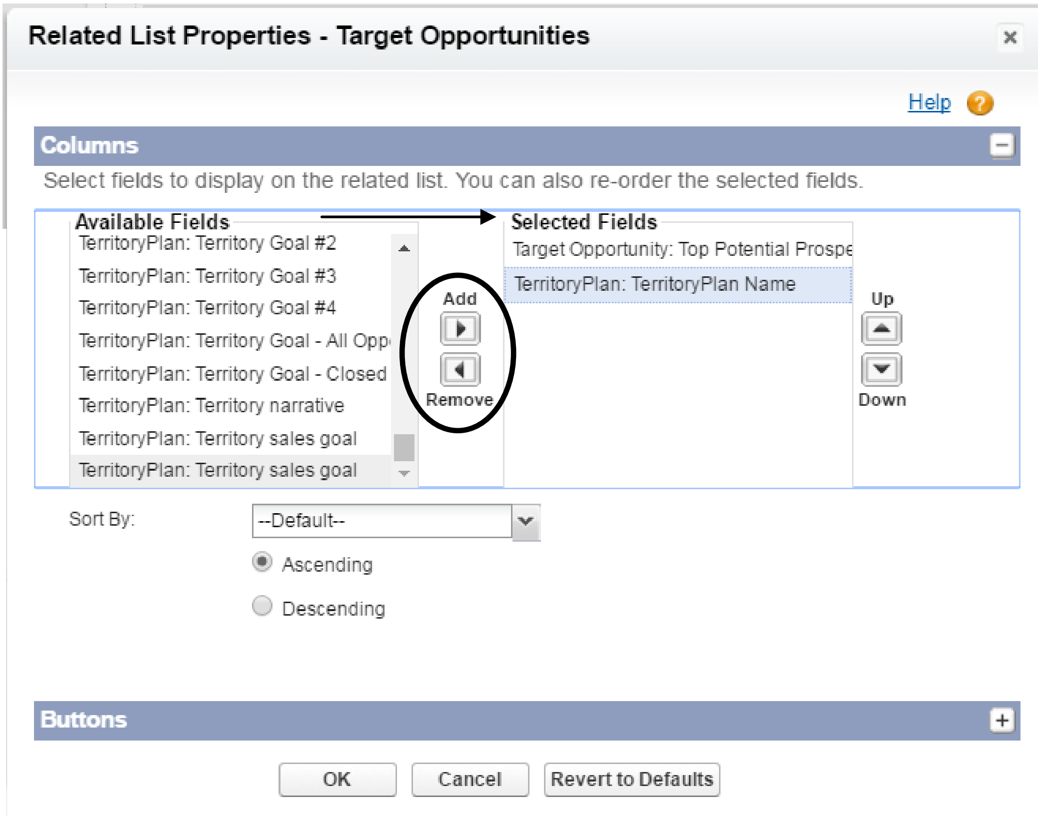
On the left side, select: Related Lists -> Drag Target Opportunities and place it where you want it in the page layout.
Save.



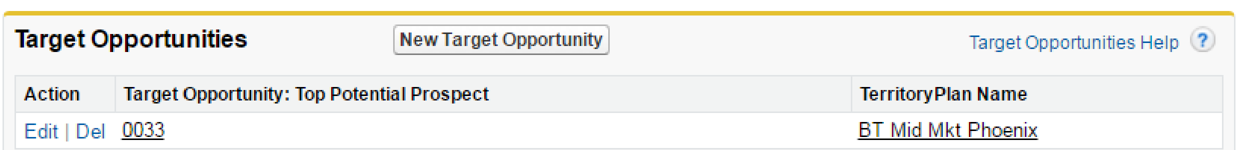
Add additional fields to the section by clicking the wrench in the Account Plan Opportunities section.

14. OPTIONAL: Add Accounts and Opportunities from Account and Opportunity Pages (continued)

After clicking the wrench, select available fields that you want to include in the section by selectin the field and clicking “Add” then “Save.”



The Opportunity page will now have this section in it. Users can add the opportunity into the Territory Plan from the Opportunity page using this section.



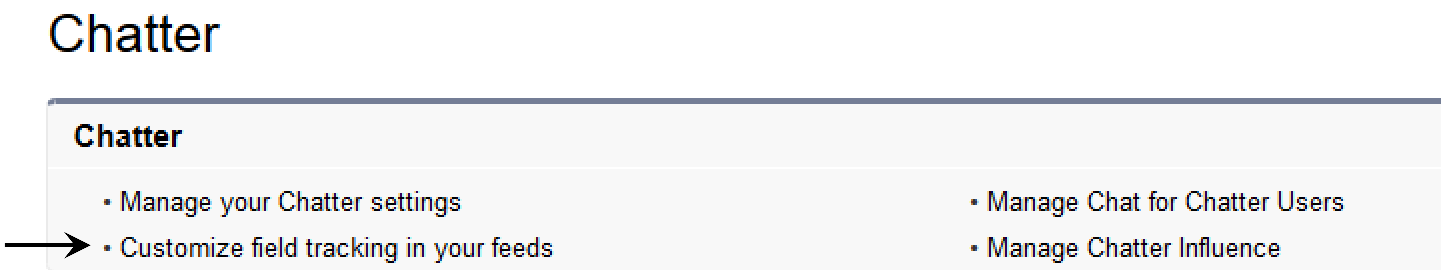
15. OPTIONAL: Follow Plan Changes on Chatter

Optional: Following your plans on Chatter.

Overview

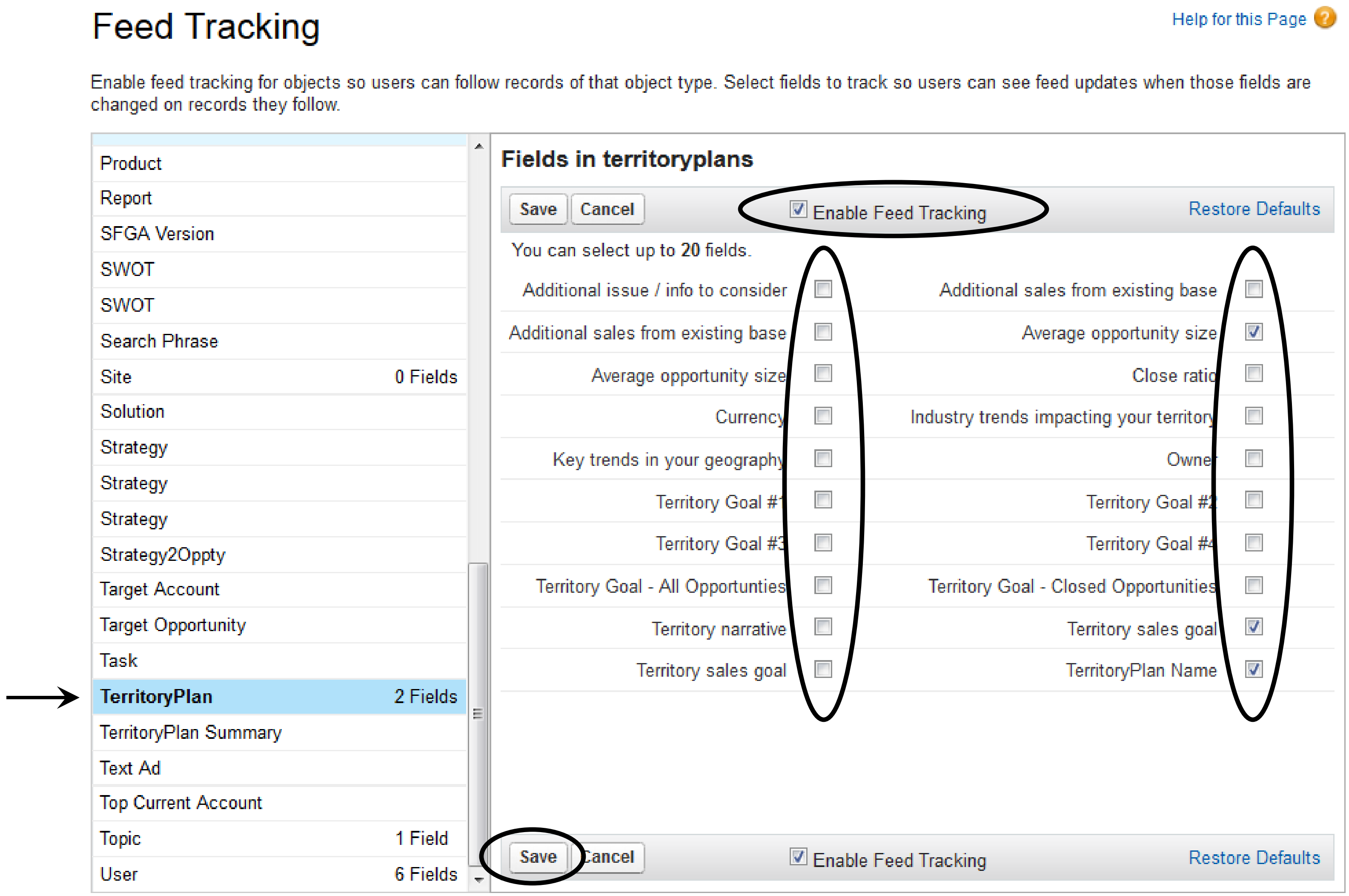
The way Chatter is set up, you can follow changes in fields unique to that object- for example fields that are unique to the territory plan. If you want to follow changes in fields from other custom fields or standard fields, you need to track them through the feed tracking of that object. For example, if you want to follow changes to the amount field associated with the opportunity object, you would track that through the opportunity object in Chatter.

Set up -> Customize -> Chatter -> Customize field tracking in your feeds



15. OPTIONAL: Follow Plan Changes on Chatter (continued)

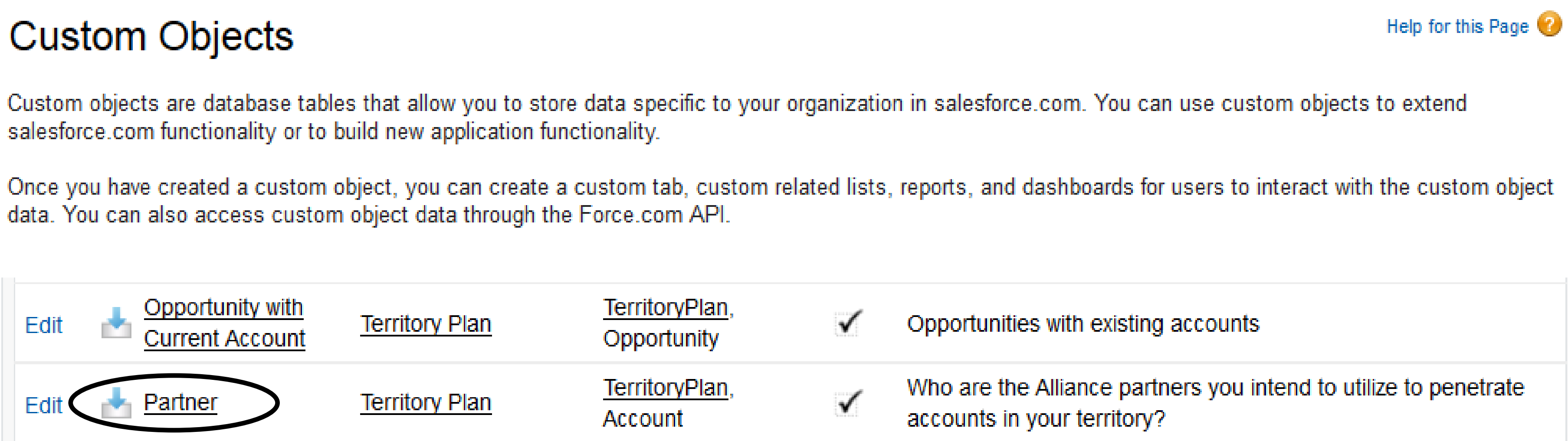
In the Feed Tracking screen, select the object in which the fields reside- i.e. Territory Plan
Click "enable feed tracking" and check the fields in territory plans to track and click Save.



16. OPTIONAL: Adding Fields to Edit Pages

Set up -> Create -> Objects

Scroll down and Click on the object of the edit page you want to add a field to; for example, the Partner object in the Territory Plan and edit page.



Custom Objects

Help for this Page

Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

Edit	Opportunity with Current Account	Territory Plan	TerritoryPlan, Opportunity	✓	Opportunities with existing accounts
Edit	Partner	Territory Plan	TerritoryPlan, Account	✓	Who are the Alliance partners you intend to utilize to penetrate accounts in your territory?

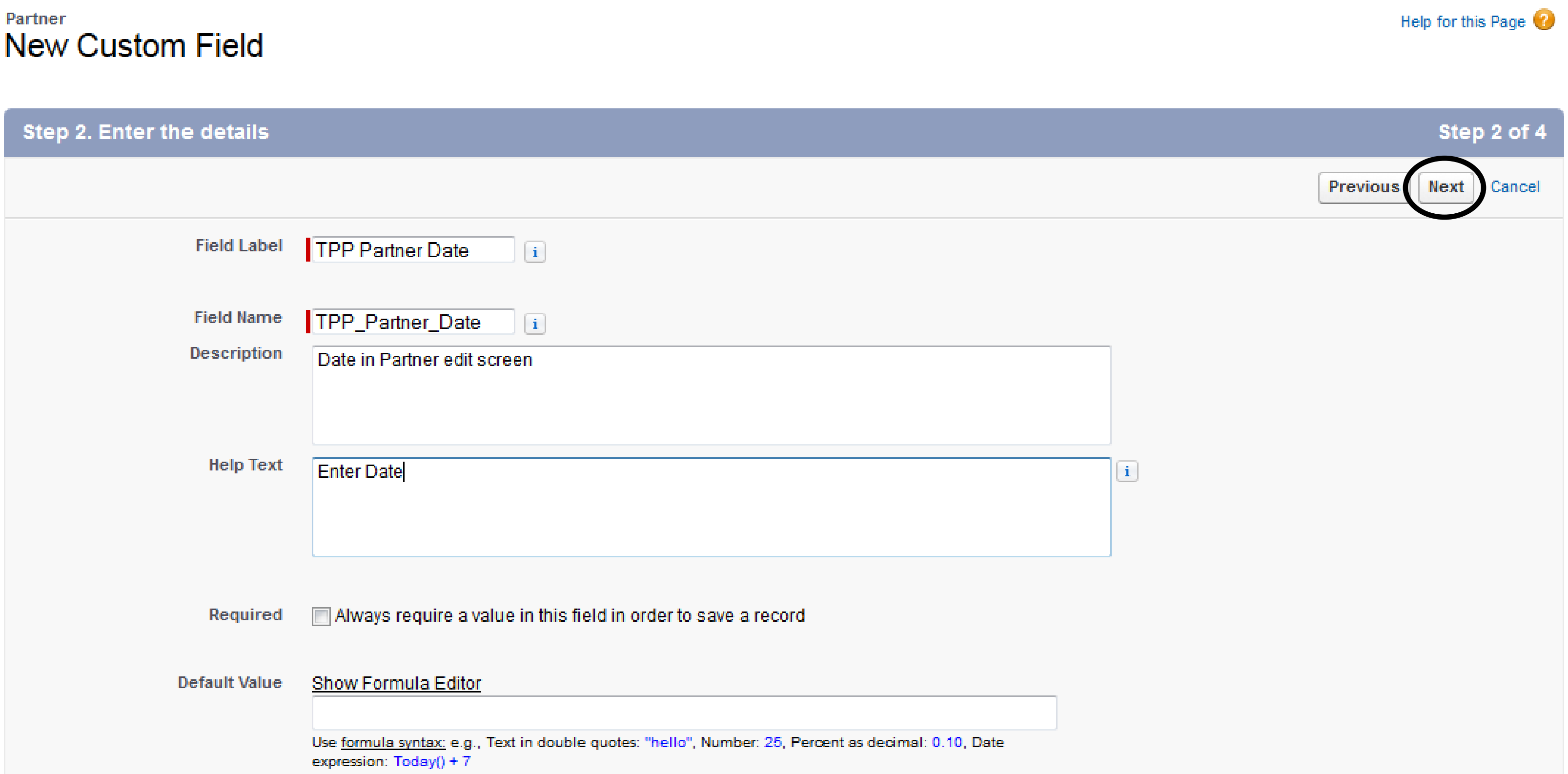
16. OPTIONAL: Adding Fields to Edit Pages (Continued)

In the Custom Object page (i.e. Partner), scroll down to Custom Fields and Relationships and Click New.

Follow the steps:

Step 1: Choose the Field Type -> click the radio button of the appropriate field type -> Next

Step 2: Enter Details -> input required fields, i.e. Field Label and Field Name… and other elements, i.e. Description -> Next



16. OPTIONAL: Adding Fields to Edit Pages (Continued)

Step 3: Establish Field Level Security -> check appropriate boxes: Visible, Read-Only - > Next

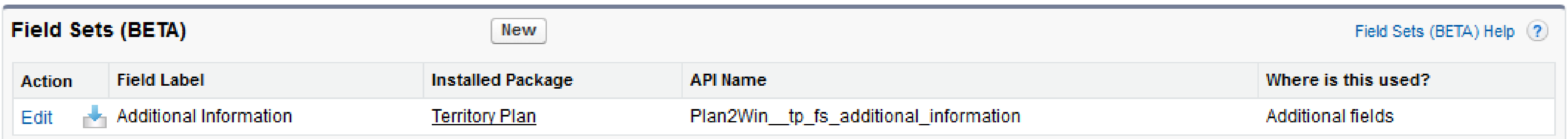
Step 4: Add to Page Layouts -> Select page layout- typically, use the default -> Save

16. OPTIONAL: Adding Fields to Edit Pages (Continued)

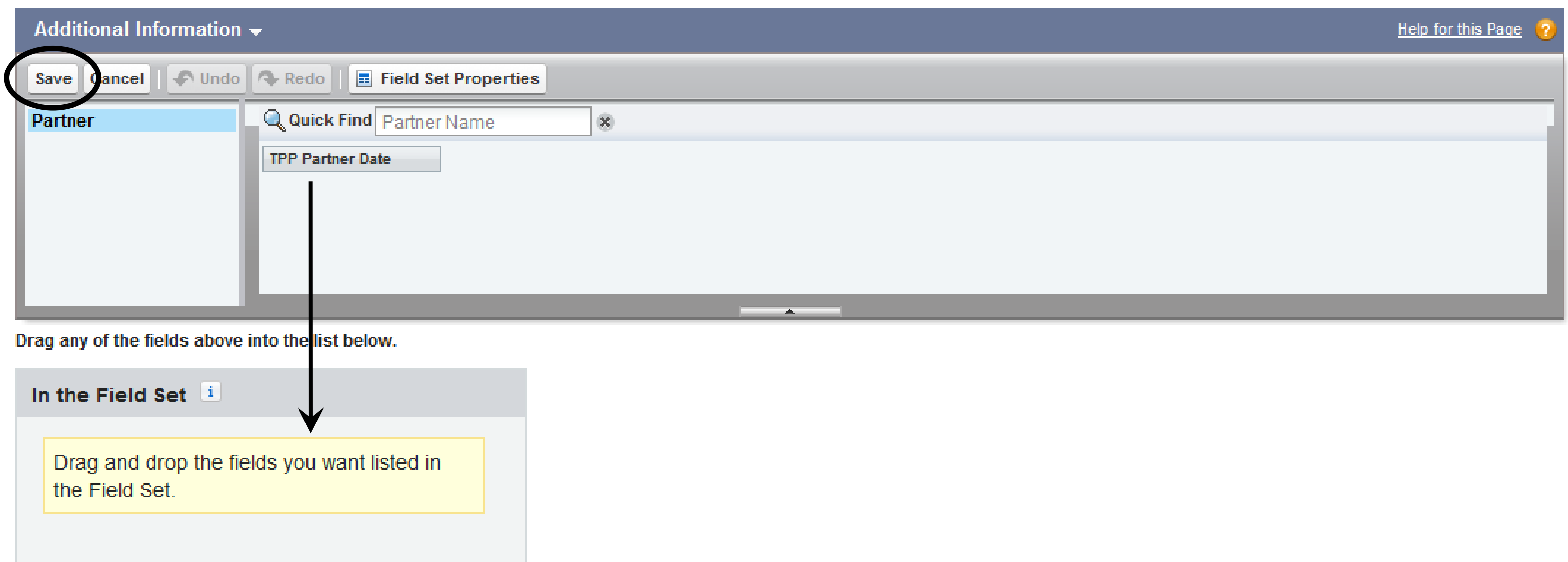
Set up -> Create -> Click Objects

Click on the Object you added the new field to, i.e. Partner (you may already be on this page)

Scroll down to Field Sets -> Click Edit

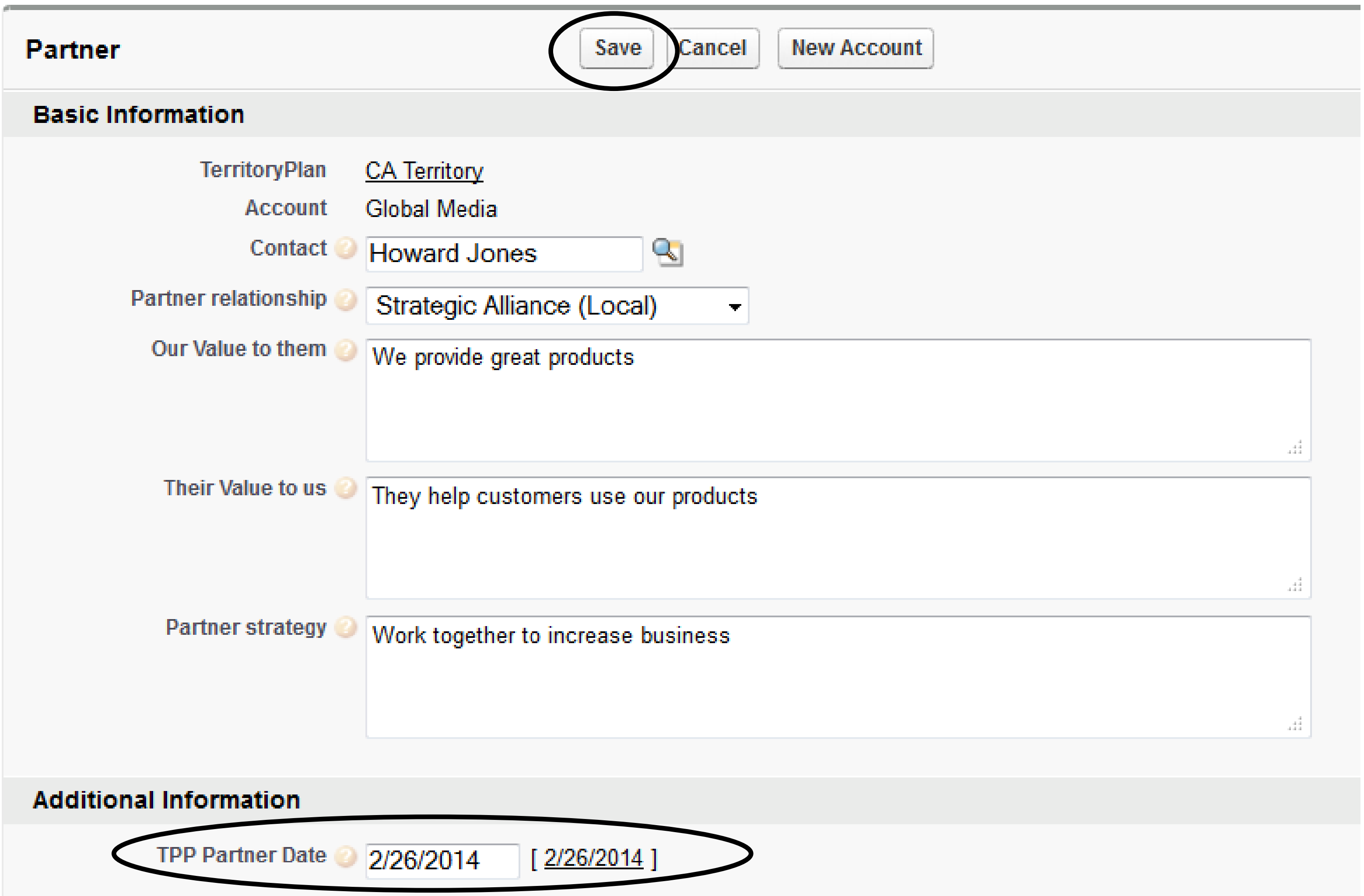


Drag the New Field into the “In the Field Set” area and Click Save.



16. OPTIONAL: Adding Fields to Edit Pages (Continued)

The new field will show up in the bottom section (Additional Information) in the edit page, i.e. Partner page.



17. OPTIONAL: Adding Fields to Sections

Set up -> Create -> Objects

Scroll down and Click on the Territory Plan object

Custom Objects

Help for this Page

Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

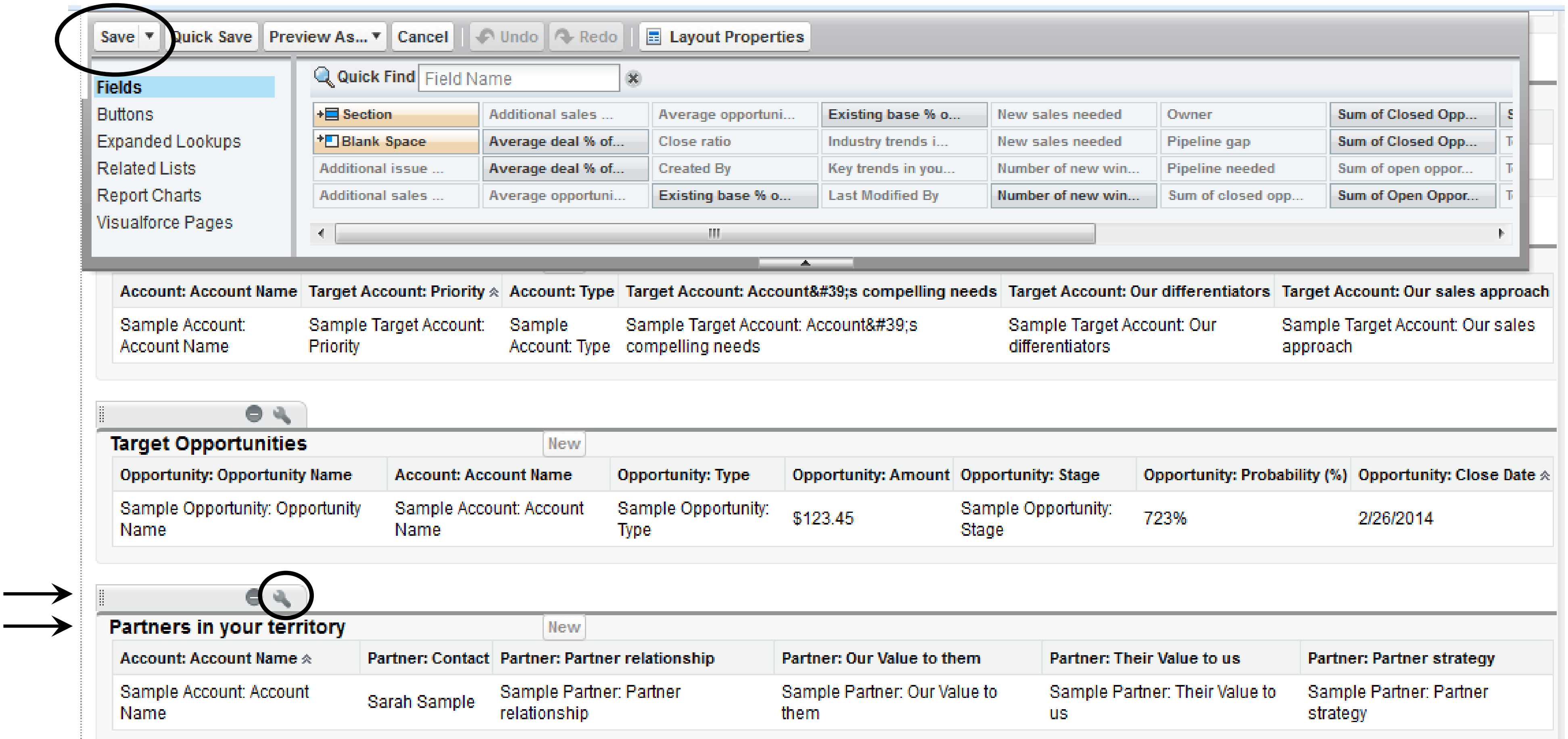
Edit	Target Opportunity	Territory Plan	TerritoryPlan, Opportunity	✓	Opportunities with new target accounts
Edit	TerritoryPlan	Territory Plan		✓	Maintains information regarding Territory Plans
Edit	TerritoryPlan Summary	Territory Plan		✓	

Scroll down to Page Layouts and click Edit to the left of the Page Layout you are using (typically the most recent one at the bottom of the list).

17. OPTIONAL: Adding Fields to Sections (continued)

Scroll down and Click on the section you wish to modify, i.e. the Partner Section.

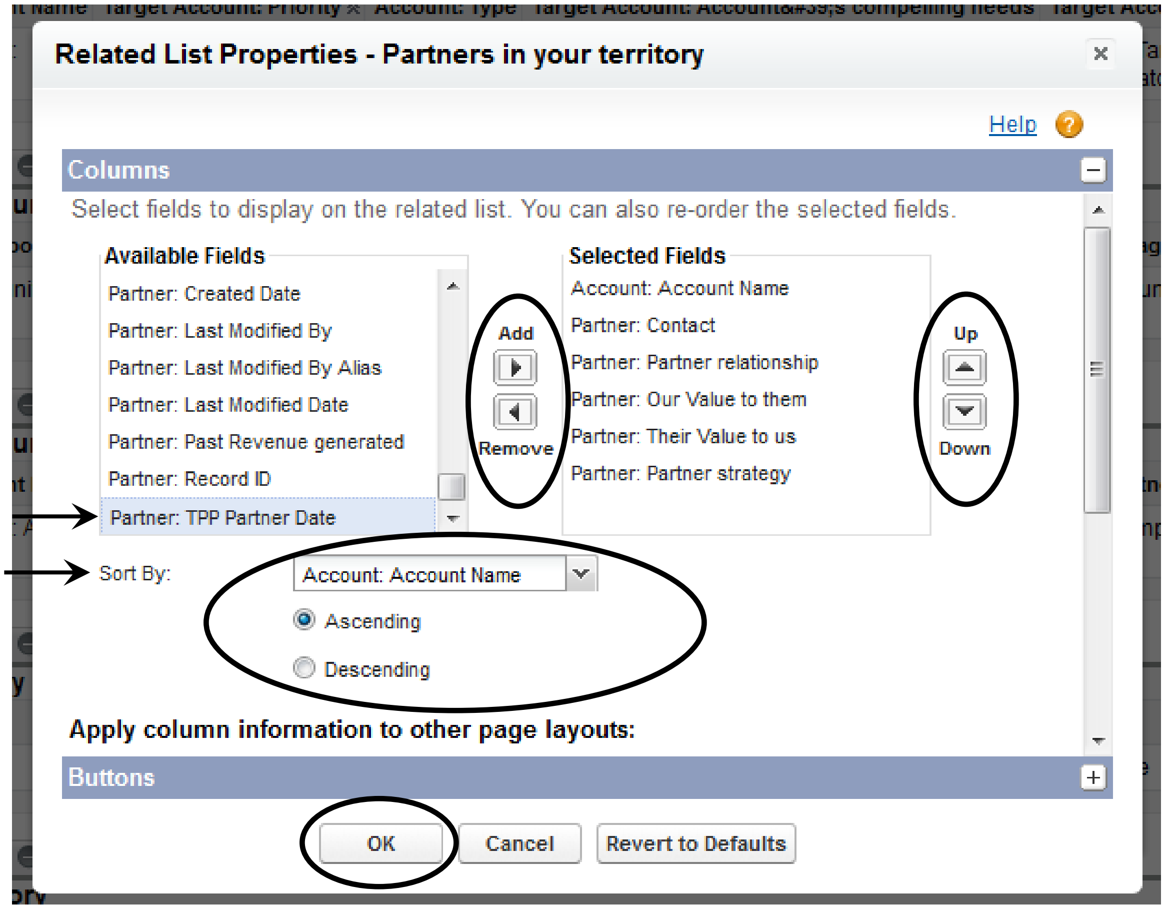
Click the wrench on top of the Section Label.



17. OPTIONAL: Adding Fields to Sections (continued)

Select from the available fields on the left, click the Add button in the middle and the selected field will appear in the Selected Fields on the right.
You can remove fields from the Selected Fields using the Remove button.

Use the Up/Down arrows to put the fields in the desired order in the Section.
Select the field you want to sort by and if in Ascending or Descending order. Click OK at the bottom.
Click Save in the Territory Plan Layout screen.



17. OPTIONAL: Adding Fields to Sections (continued)

Your field is now in the section.

Partners in your territory New Partner

Action	Account Name	Contact	Partner relationship	Our Value to them	Their Value to us	Partner strategy	TPP Partner Date
Edit | Del	Global Media	Howard Jones	Strategic Alliance (Local)	We provide great products	They help customers use our products	Work together to increase business	2/26/2014

18. OPTIONAL: Adding Approval History Section

You may want to add the Approval History Section to your page layout. In it you, the system administrator, can add workflows to enable approval of plans.

Go to: Setup -> App Setup -> Create -> Objects

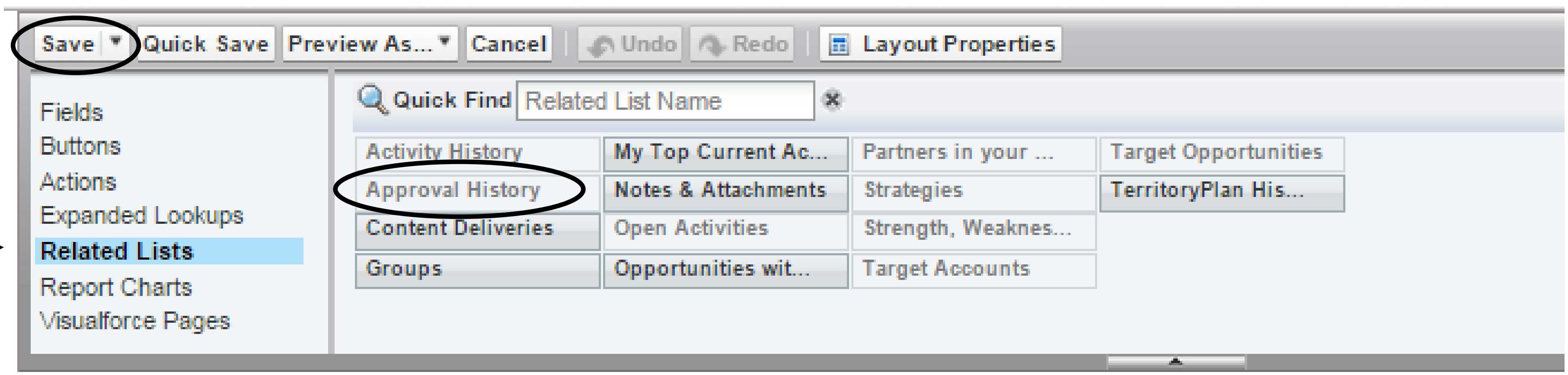
Click on TerritoryPlan.

Scroll down to Page Layouts and click edit to the left of the most recent Page Layout Name.

Click Related Lists on the left of the section at the top.

Drag Approval History to where you want it to be in the page layout; usually the bottom.

Set up the Approval history section as you want it to be, including workflows for approval, and click Save



19. OPTIONAL: Changing to a Custom Opportunity Amount Field

If you use a custom opportunity amount field, here is how you can use that field in the Territory Plan Sums and other features.

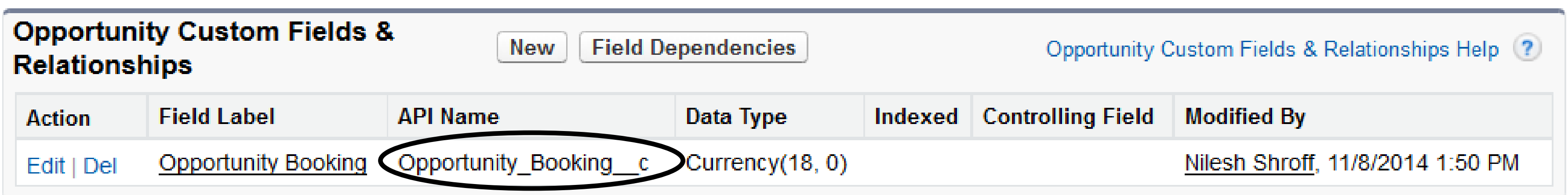
If the custom amount field, here is how you can set it up… associated with the Opportunity object.

Setup -> App Setup -> Customize -> Opportunity -> Fields
On the Opportunities Fields page, scroll down to the Opportunity Custom Fields and Relationships section

Click New

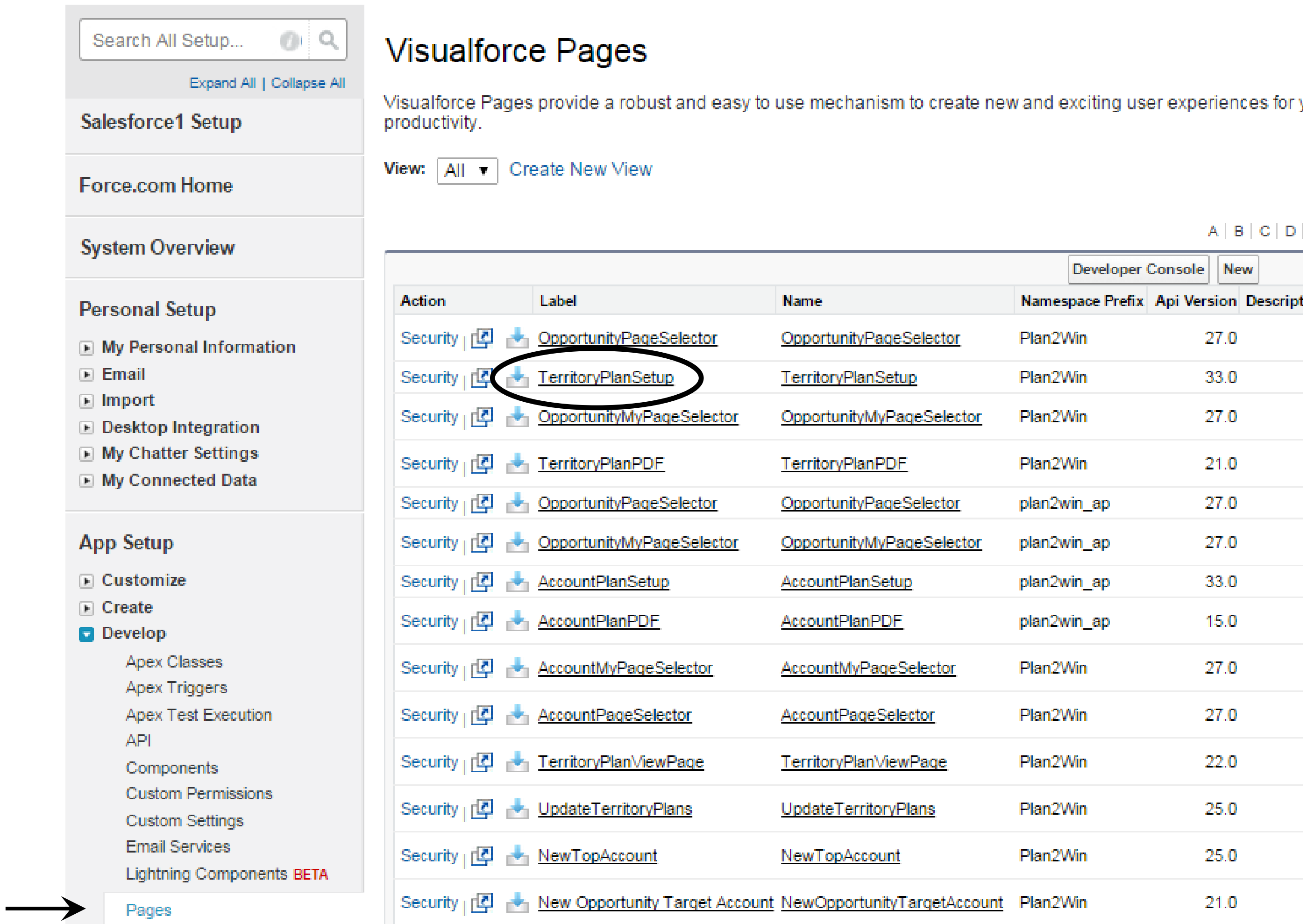
Follow the instructions to create the new amount field you desire.

When you are done, it will show up in the Opportunity Custom Fields and Relationships section.
Note the API name as you will need it in the next step.



19. OPTIONAL: Changing to a Custom Opportunity Amount Field (continued)

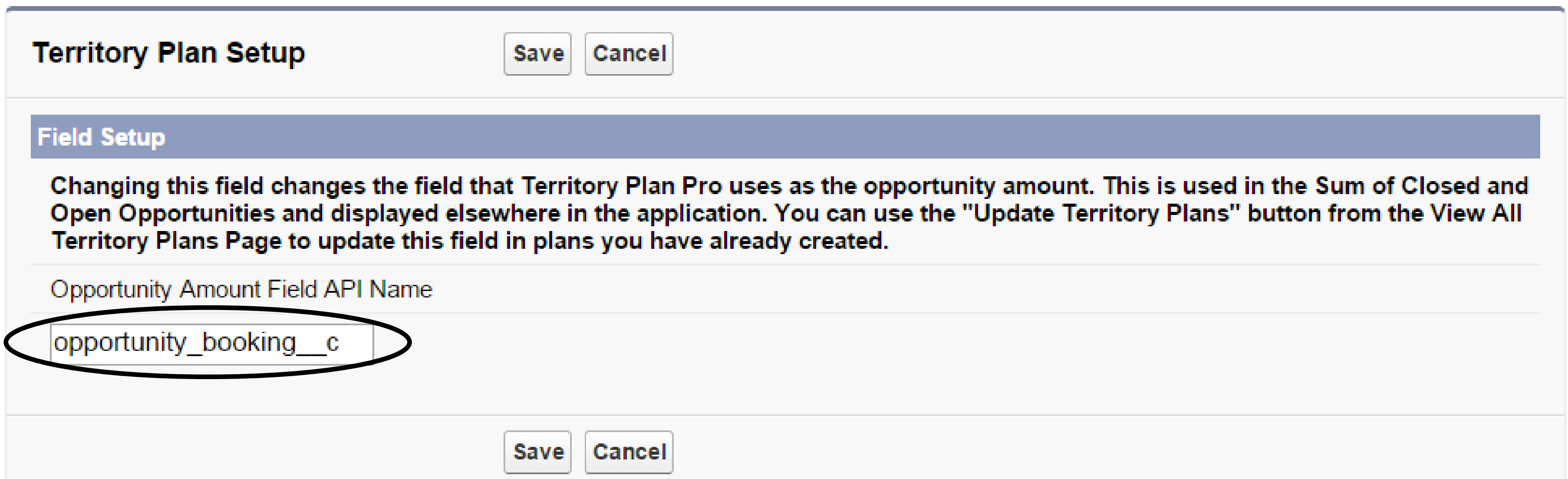
With your custom amount field set Up (you may have had it set up), here is how you proceed.
Setup -> App Setup -> Develop -> Pages
Click TerritoryPlanSetup



19. OPTIONAL: Changing to a Custom Opportunity Amount Field (continued)

On the Visual Force page: plan2win_ap_AccountPlanSetup:
Click Preview in the middle of the top of the page.

Enter the API name of your custom opportunity amount field.
Click Save.

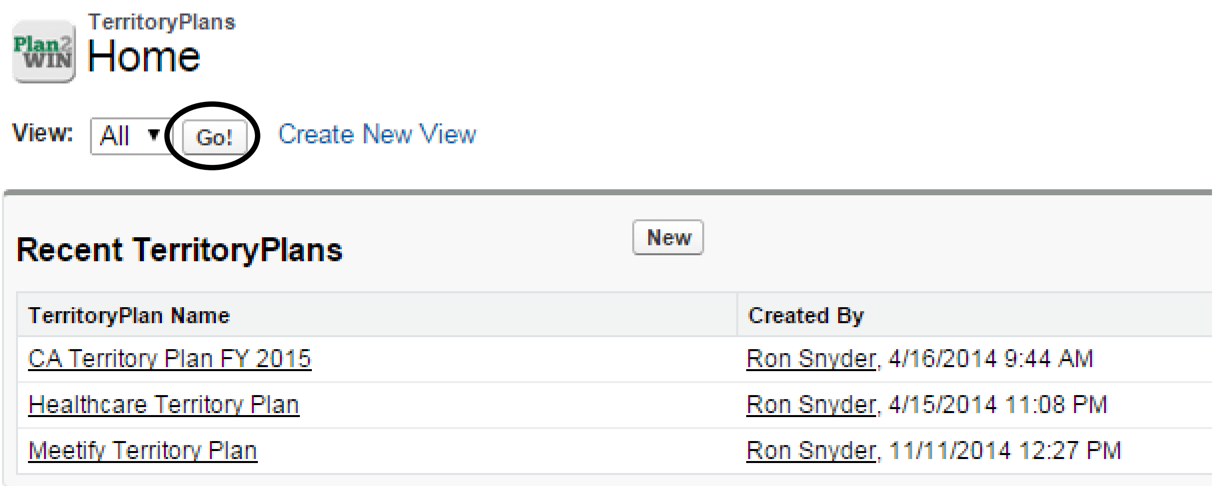


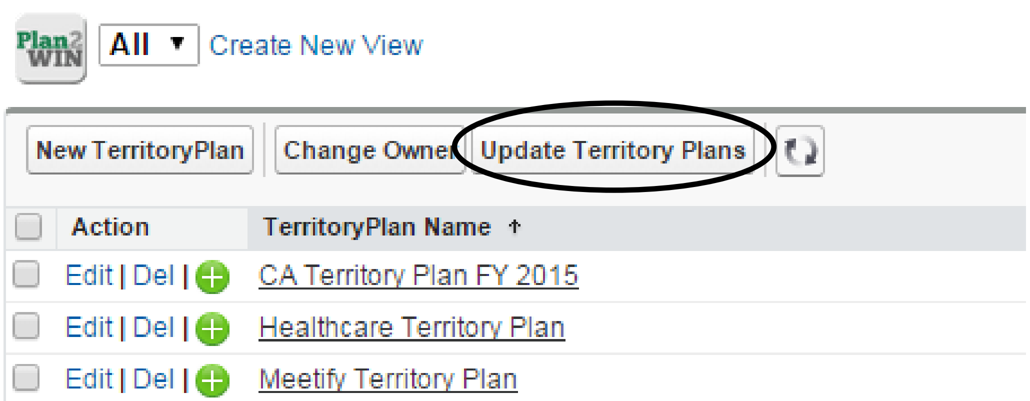
To add your custom opportunity amount field to the Territory Plan Opportunity Section, see the topic: Adding Fields to Sections in this guide.

19. OPTIONAL: Changing to a Custom Opportunity Amount Field (continued)

If your team has created plans prior to you setting up the plans to use your custom opportunity amount field, update plans as follows. This only needs to be done once- after you have made the above change.

Click on the TerritoryPlans tab then click the Go! button.





19. OPTIONAL: Changing to a Custom Opportunity Amount Field (continued)

You may want to add your custom opportunity amount into our reports and dashboard.

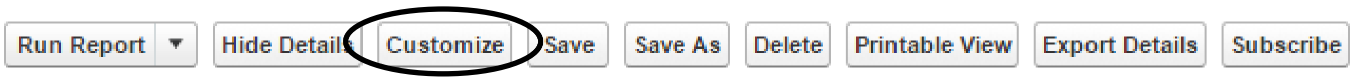
Changing Reports:

Click the reports tab.

In the Folders section, click Territory Plan Reports.

Click on a report that uses the amount field.

Click Customize



Scroll down on the left side until you find your custom opportunity amount field. Drag it where you want it to be in the report.

You may want to remove the Amount field.

Set up the report as you wish and Click Save. You may want to rename the report.

Changing Dashboard:

Click the Dashboards tab.

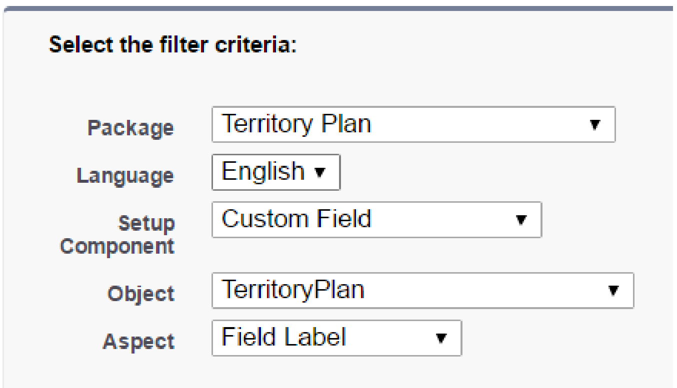
In the drop-down menu, click Territory Plan Dashbd.

Click Edit and add in the new or modified reports. You may want to remove some of the standard reports.

20. OPTIONAL: Translation Workbench to Change Field Labels

Here is how to work with Translation Workbench to change field labels

Go to Set Up -> under Administration Set Up -> Translation Workbench -> Override.
On that page, under Select filter criteria:
Package: Territory Plan
Set up component: Custom field
Object: choose from drop down
Aspect: Field label



Then:
Find the Master field label you want to change
Under Field label override, click in the box to make the change and type in the new field label.
Save.

Master Field Label	Field Label Override	Field Type
Additional issue / info to consider		Long Text Area(2000)
Additional sales from existing base		Currency(18, 0)

21. OPTIONAL: Change Help Text

Here is how to change Help Text.

Go to Set Up -> Create -> Objects.
Click on the Object in which the field you want to change resides (i.e. TerritoryPlan, Strategy, SWOT, etc.).
Scroll down to **Custom Fields and Relationships.**
Select the Field (under Field Labels) for which you would like to change the help text. Click on the Field Label.
Click Edit.
In the Help Text box, type in the new Help Text you want. Click Save.