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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” 2<sup>nd</sup> screen, select the 2<sup>nd</sup> 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” 3<sup>rd</sup> screen, click install.

Package Installer

[Help for this Page](#) ?

### Territory Plan

#### Step 2. Choose security level

Step 2 of 3

Select security settings:

- ☐ Grant access to admins only Users with your profile get full access (best for limited deployments)
- ☒ Grant access to all users All internal custom profiles get full access
- ☐ Select security settings User access set by profile (recommended for most packages)

[Previous](#) [Next](#) [Cancel](#)

### 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

**User Edit**

**General Information**

First Name	Nilesh	Role	<None Specified>
Last Name	Test	User License	Salesforce
Alias	Test	<b>Profile</b>	System Administrator
Email	test@an2software.com	Active	<input checked="" type="checkbox"/>
Username	test@ppapptest.com	Marketing User	<input type="checkbox"/>
Community Nickname	nilesh	Offline User	<input type="checkbox"/>

### 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			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Account Channel Partners	✓	✓	✓	✓	✓	✓		Package Versions	✓	✓	✓	✓	✓
AccountPlans	✓	✓	✓	✓	✓	✓		Partners in your territory	✓	✓	✓	✓	✓
Account Relationships	✓	✓	✓	✓	✓	✓		Strategies	✓	✓	✓	✓	✓
Account Team	✓	✓	✓	✓	✓	✓	Strength, Weakness, Opportunity, Threat	✓	✓	✓	✓	✓	✓
Associated Opportunities	✓	✓	✓	✓	✓	✓		Target Accounts	✓	✓	✓	✓	✓
Licenses	✓	✓	✓	✓	✓	✓		Target Opportunities	✓	✓	✓	✓	✓
Opportunities with Current Accounts	✓	✓	✓	✓	✓	✓		TerritoryPlans	✓	✓	✓	✓	✓
Packages	✓	✓	✓	✓	✓	✓		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 <span>Edit</span> <span>Enabled Visualforce Page Access Help ?</span>	
Visualforce Page Name	AppExchange Package Name
<a href="#">Plan2Win.NewChannelPartner</a>	<a href="#">Territory Plan</a>
<a href="#">Plan2Win.NewOpportunityCurrentAccount</a>	<a href="#">Territory Plan</a>
<a href="#">Plan2Win.NewOpportunityTargetAccount</a>	<a href="#">Territory Plan</a>
<a href="#">Plan2Win.NewSWOT</a>	<a href="#">Territory Plan</a>
<a href="#">Plan2Win.NewStrategy</a>	<a href="#">Territory Plan</a>
<a href="#">Plan2Win.NewTargetAccount</a>	<a href="#">Territory Plan</a>
<a href="#">Plan2Win.NewTopAccount</a>	<a href="#">Territory Plan</a>
<a href="#">Plan2Win.TerritoryPlanPDF</a>	<a href="#">Territory Plan</a>
<a href="#">Plan2Win.TerritoryPlanViewPage</a>	<a href="#">Territory Plan</a>

**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:

### Enable Visualforce Page Access

The screenshot shows a Salesforce configuration window titled 'Enable Visualforce Page Access'. At the top right, there are 'Save' and 'Cancel' buttons, with the 'Save' button circled in red. Below the buttons, there are two columns of lists. The left column is titled 'Available Visualforce Pages' and contains a single entry '-None-'. The right column is titled 'Enabled Visualforce Pages' and contains a list of nine Visualforce page names: Plan2Win.NewChannelPartner, Plan2Win.NewOpportunityCurrentAccount, Plan2Win.NewOpportunityTargetAccount, Plan2Win.NewSWOT, Plan2Win.NewStrategy, Plan2Win.NewTargetAccount, Plan2Win.NewTopAccount, Plan2Win.TerritoryPlanPDF, and Plan2Win.TerritoryPlanViewPage. Between the two lists are 'Add' and 'Remove' buttons, represented by right and left arrow icons respectively.

### 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 <b>Manage Licenses</b>	 Territory Plan	Plan 2 Win Software, LLC	4.1	Plan2Win	Active	2	0	5/2/2014	5/1/2013 10:57 AM
<b>Description</b> 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.**

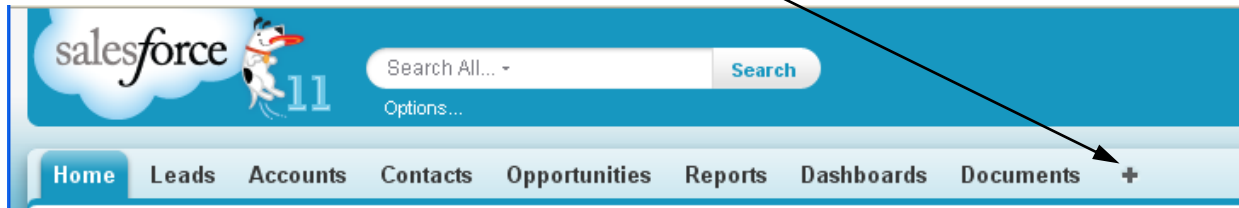
This should be done for or by each user.

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.

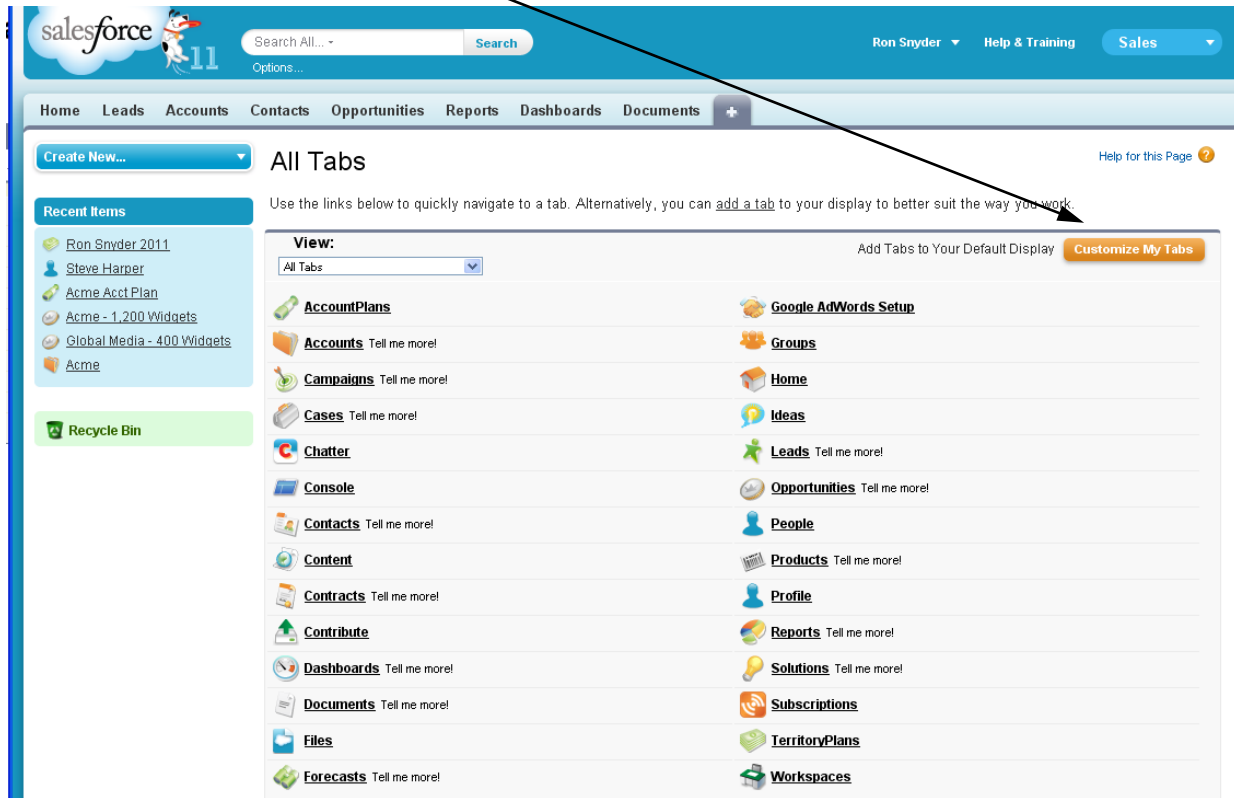
How: Add the Custom Tab (see graphics on next two pages)

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



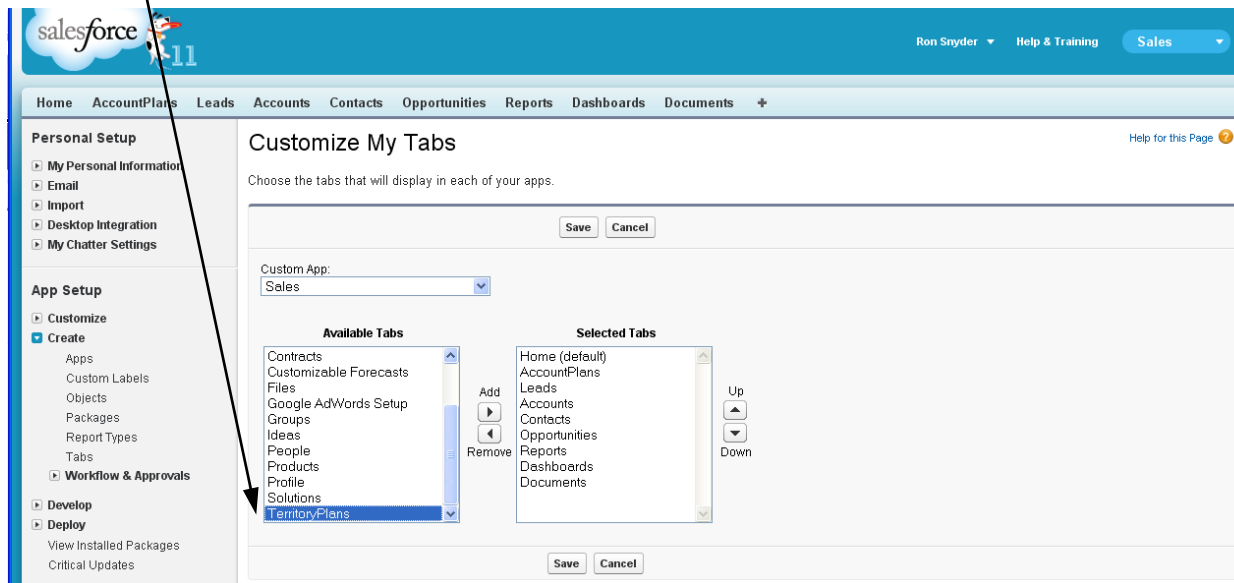
### 6. Add the TerritoryPlans Tab

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

**App Setup**

- Customize
- Create**
  - Apps
  - Custom Labels
  - Objects**
  - Packages
  - Report Types
  - Tabs
- Workflow & Approvals
- Develop
- Deploy
  - Schema Builder
  - Installed Packages
  - AppExchange Marketplace
  - Critical Updates

**Administration Setup**

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- Data Management
- Monitoring
- Mobile Administration
- Desktop Administration

Edit	 <a href="#">AccountPlan Relationship</a>	Account Plan Pro	AccountPlan, Contact	✓	
Edit	 <a href="#">AccountPlan Summary</a>	Account Plan Pro		✓	Internal Object used primarily for analytic snapshots
Edit	 <a href="#">AccountPlan Team Member</a>	Account Plan Pro	AccountPlan	✓	
Edit	 <a href="#">Ad Group</a>	Salesforce for Google AdWords		✓	A Google Ad Group is a collection of Text Ads and Keywords
Edit	 <a href="#">Google Campaign</a>	Salesforce for Google AdWords		✓	Google AdWords Campaigns are high-level marketing initiatives
Edit	 <a href="#">Keyword</a>	Salesforce for Google AdWords		✓	Keywords are the terms purchased in Google AdWords
Edit	 <a href="#">Opportunity with Current Account</a>	Territory Plan	TerritoryPlan, Opportunity	✓	Opportunities with existing accounts
Edit	 <a href="#">Partner</a>	Territory Plan	TerritoryPlan, Account	✓	Who are the Alliance partners you intend to utilize to penetrate accounts in your territory?
Edit	 <a href="#">SFGA Version</a>	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	 <a href="#">SWOT</a>	Account Plan Pro	AccountPlan	✓	
Edit	 <a href="#">SWOT</a>	Territory Plan	TerritoryPlan	✓	
Edit	 <a href="#">Search Phrase</a>	Salesforce for Google AdWords		✓	Search Phrases are the search terms or phrases the user types into a search box
Edit	 <a href="#">Strategy</a>	Account Plan Pro	AccountPlan	✓	
Edit	 <a href="#">Strategy</a>	Territory Plan	TerritoryPlan	✓	
Edit	 <a href="#">Target Account</a>	Territory Plan	Account, TerritoryPlan	✓	New potential accounts
Edit	 <a href="#">Target Opportunity</a>	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

Expand All | Collapse All  
Quick Find  
Force.com Home  
System Overview  
Personal Setup  
My Personal Information  
Email  
Import  
Desktop Integration  
My Chatter Settings  
App Setup  
Customize  
Create  
Apps  
Custom Labels  
Objects  
Packages  
Report Types  
Tabs  
Workflow & Approvals  
Develop  
Deploy  
Schema Builder  
Installed Packages  
AppExchange Marketplace  
Critical Updates  
Administration Setup  
Manage Users  
Company Profile  
Security Controls  
Communication Templates  
Translation Workbench  
Data Management  
Monitoring  
Mobile Administration

Edit Custom Object  
**Target Account (Managed)**  
This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)  
Custom Object Definition Edit  
Save Save & New Cancel  
Custom Object Information  
The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.  
Label Target Account Example: Account  
Plural Label Target Accounts Example: Accounts  
Starts with vowel sound  
The Object Name is used when referencing the object via the API.  
Object Name tp\_potential\_account Example: Account  
Description New potential accounts  
Context-Sensitive Help Setting Open the standard Salesforce.com Help & Training window  
Open a window using a Visualforce page  
Content Name --None--  
Enter Record Name Label and Format  
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for that the Record Name field is always called "Name" when referenced via the API.  
Record Name Potential Account Example: Account Name  
Data Type Auto Number  
Display Format {0000} Example: A-{0000} [What Is This?](#)  
Optional Features  
☒ Allow Reports  
☐ Allow Activities  
☒ Track Field History

### 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

### TPP: Terr Plan Dashbd

[Help for this Page](#) ?

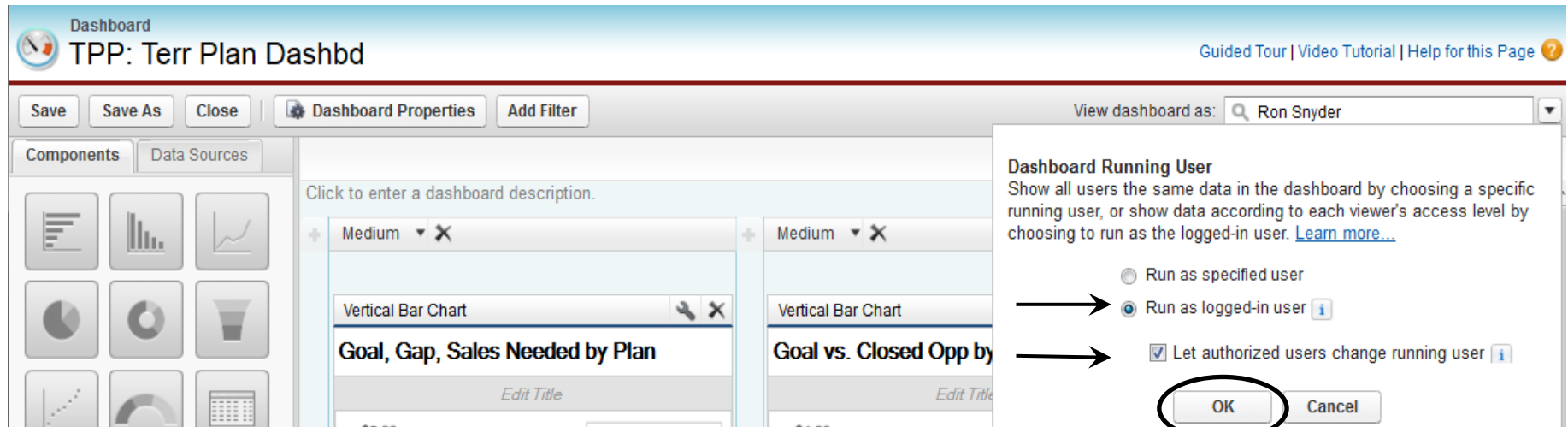
Find a dashboard...  Clone Refresh As of April 22, 2013 at 3:04 PM

Viewing as Ron Snyder

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.



Dashboard

### TPP: Terr Plan Dashbd

Guided Tour | Video Tutorial | [Help for this Page](#) ?

Save Save As Close Dashboard Properties Add Filter

View dashboard as: Ron Snyder

**Dashboard Running User**  
Show all users the same data in the dashboard by choosing a specific running user, or show data according to each viewer's access level by choosing to run as the logged-in user. [Learn more...](#)

☐ Run as specified user

☒ Run as logged-in user

☒ Let authorized users change running user

OK Cancel

### 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

Expand All | Collapse All

Quick Find

**Force.com Home**

**System Overview**

**Personal Setup**

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

**App Setup**

- Customize
- Create
- Develop
- Deploy
  - Schema Builder
  - Installed Packages
  - AppExchange Marketplace
  - Critical Updates

**Administration Setup**

- Manage Users
- Company Profile
- Security Controls**

Sharing Settings

## Sharing Settings

[Criteria-Based Sharing Rules Video Tutorial](#) | [Help for this Page](#) ?

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data.

Manage sharing settings for: All Objects

**Default Sharing Settings**

**Organization-Wide Defaults** Edit [Organization-Wide Defaults Help](#) ?

Object	Default Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	✓
Account, Contract and Asset	Public Read/Write	✓
Contact	Controlled by Parent	✓
Opportunity	Public Read Only	✓
Case	Public Read/Write/Transfer	✓
Campaign	Public Full Access	✓
Activity	Private	✓
Calendar	Hide Details and Add Events	✓
Price Book	Use	✓
AccountPlan	Public Read/Write	✓
AccountPlan Opportunity	Controlled by Parent	
AccountPlan Partner	Controlled by Parent	
AccountPlan Relationship	Controlled by Parent	
AccountPlan Team Member	Controlled by Parent	
Ad Group	Public Read/Write	✓
Google Campaign	Public Read/Write	✓



### 9. OPTIONAL: Set Privacy Settings

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

Object	Default Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	<input checked="" type="checkbox"/>
Account, Contract and Asset	Public Read/Write	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read Only	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	<input checked="" type="checkbox"/>
Campaign	Public Full Access	<input checked="" type="checkbox"/>
Activity	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events	<input checked="" type="checkbox"/>
Price Book	Use	<input checked="" type="checkbox"/>
AccountPlan	Public Read/Write	<input checked="" type="checkbox"/>
Ad Group	Public Read/Write	<input checked="" type="checkbox"/>
Google Campaign	Public Read/Write	<input checked="" type="checkbox"/>
Keyword	Public Read/Write	<input checked="" type="checkbox"/>
Search Phrase	Public Read/Write	<input checked="" type="checkbox"/>
SFGA Version	Public Read/Write	<input checked="" type="checkbox"/>
TerritoryPlan	Public Read/Write	<input checked="" type="checkbox"/>
Text Ad	Public Read/Write	<input checked="" type="checkbox"/>

### 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

**Reporting Snapshots**

Reporting snapshots allow you to load data from a custom report to a custom object on a regularly scheduled basis. Reporting snapshots enable you to work with other records in salesforce.com.

View: All Reporting Snapshots [Create New View](#)

Action	Name	Description	Scheduled	Next Run	Last Run
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AccountPlanSummary</a>		✓		12/23/2012 12:09 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">TerritoryPlanSummary</a>		✓		5/16/2014 12:28 AM

### 10. OPTIONAL: Set Up Reporting Snapshot

**Optional:** Scroll to Schedule Reporting Snapshot -> click Edit

[Expand All](#) | [Collapse All](#)

Salesforce1 Setup

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings
- My Connected Data

App Setup

- Customize
- Create
- Develop
- Deploy
  - Schema Builder
  - Canvas App Previewer
  - Installed Packages
  - AppExchange Marketplace
  - Critical Updates

Administration Setup

Reporting Snapshots

### TerritoryPlanSummary

« [Back to List: Reporting Snapshots](#)

This Reporting Snapshot is managed, meaning that you may only edit certain attributes. [Display More Information](#)

**Identification** [Edit](#) [Delete](#)

Reporting Snapshot Name	TerritoryPlanSummary	Next Run	
Reporting Snapshot Unique Name	tp_territoryplansummary_snapshot	Last Run	5/16/2014 12:28 AM
Namespace Prefix	Plan2Win	Installed Package	<a href="#">Territory Plan</a>
Description		Created By	<a href="#">Ron Snyder</a> , 4/15/2014 11:02 PM
Running User	<a href="#">Ron Snyder</a>	Last Modified By	<a href="#">Ron Snyder</a> , 4/15/2014 11:02 PM
Source Report	<a href="#">TPP: Territory Plan Summary</a>	Target Object	<a href="#">TerritoryPlan Summary</a>

[Edit](#) [Delete](#)

**Field Mappings** [Edit](#) Columns in Source Report: 6 Fields in Target Object: 6 [Field Mappings Help](#)

Source Report Column	Target Object Field
New sales needed	New sales needed (Currency(18, 0))
Pipeline gap	Pipeline gap (Currency(18, 0))
Pipeline needed	Pipeline needed (Currency(18, 0))
TerritoryPlan: TerritoryPlan Name	TerritoryPlan Name (Text(250))

**Schedule Reporting Snapshot** [Edit](#) [Schedule Reporting Snapshot Help](#)

Frequency	Preferred Start Time	Start Time	End Time
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### 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

Schedule Reporting Snapshot

TerritoryPlanSummary

Schedule Reporting Snapshot

SaveCancelUnschedule Snapshot

Email Reporting Snapshot☒ To me☐ To others...

Scheduled Run

Frequency

☐ Daily☒ Weekly☐ Monthly

Recurs every week on

☒ Sunday☐ Monday☐ Tuesday☐ Wednesday☐ Thursday☐ Friday☐ Saturday

Start3/3/2015[3/3/2015]

End4/26/2015[3/3/2015]

Preferred Start TimeFind available options...

Exact start time will depend on job queue activity.

SaveCancelUnschedule Snapshot

salesforce.com®  
AppExchange Partner

[www.plan2winsoftware.com](http://www.plan2winsoftware.com)

650-508-0622

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### 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

New

Page Layout Assignment

Page Layouts Help ?

Action	Page Layout Name	Installed Package	Created By	Modified By
<a href="#">Edit</a>   <a href="#">Del</a> 	TerritoryPlan Layout	<a href="#">Territory Plan</a>	<a href="#">Ron Snyder</a> , 5/1/2013 10:57 AM	<a href="#">Ron Snyder</a> , 5/1/2013 10:57 AM
<a href="#">Edit</a>   <a href="#">Del</a> 	TerritoryPlan Layout 1.10 Legacy	<a href="#">Territory Plan</a>	<a href="#">Ron Snyder</a> , 5/1/2013 10:57 AM	<a href="#">Ron Snyder</a> , 5/1/2013 10:57 AM
<a href="#">Edit</a>   <a href="#">Del</a> 	TerritoryPlan Layout 2.0	<a href="#">Territory Plan</a>	<a href="#">Ron Snyder</a> , 5/1/2013 10:57 AM	<a href="#">Ron Snyder</a> , 5/1/2013 10:57 AM
<a href="#">Edit</a>   <a href="#">Del</a> 	TerritoryPlan Layout 3.0	<a href="#">Territory Plan</a>	<a href="#">Ron Snyder</a> , 5/1/2013 10:57 AM	<a href="#">Ron Snyder</a> , 5/1/2013 10:57 AM
<a href="#">Edit</a>   <a href="#">Del</a> 	TerritoryPlan Layout 4.0	<a href="#">Territory Plan</a>	<a href="#">Ron Snyder</a> , 5/1/2013 10:57 AM	<a href="#">Ron Snyder</a> , 5/1/2013 10:57 AM
<a href="#">Edit</a>   <a href="#">Del</a> 	bacup	<a href="#">Territory Plan</a>	<a href="#">Ron Snyder</a> , 5/1/2013 10:57 AM	<a href="#">Ron Snyder</a> , 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

TerritoryPlan Layout 4.0 ▾
[Mini Page Layout](#)
[Mini Console View](#)
[Help for this Page](#)
?

[Save](#) ▾
[Quick Save](#)
[Preview As...](#) ▾
[Cancel](#)
[Undo](#)
[Redo](#)
[Layout Properties](#)

Fields
Buttons
Visualforce Pages
**Related Lists**

Quick Find
×

Activity History

Approval History

Content Deliveries

My Top Current Ac...

Notes & Attachments

Open Activities

Opportunities wit...

Partners in your ...

Strategies

Strength, Weaknes...

Target Accounts

Target Opportunities

TerritoryPlan His...

### 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.

The screenshot shows the Salesforce Territory Plan Layout 4.0 editor. The top bar includes the title "TerritoryPlan Layout 4.0" and links for "Mini Page Layout", "Mini Console View", and "Help for this Page". Below the top bar is a toolbar with buttons: "Save" (circled), "Quick Save", "Preview As...", "Cancel", "Undo", "Redo", and "Layout Properties".

On the left side, there is a sidebar with a tree view containing "Fields", "Buttons" (selected), "Visualforce Pages", and "Related Lists". The "Buttons" section is expanded, showing a "Quick Find" search bar and a list of buttons:

Bring in My Accounts	Edit	Select from My Ac...
Bring in My Oppor...	Generate PDF	Select from My Op...
Clone	Select from All A...	Sharing
Delete	Select from All O...	Submit for Approval

An arrow points from the "Select from All O..." button in the palette to the "Select from My Opportunities" button in the "Custom Buttons" section of the layout canvas.

The layout canvas shows a "TerritoryPlan Sample" header, a "Highlights Panel" with a text area "Customize the highlights panel for this page layout...", and a "TerritoryPlan Detail" section. The "Standard Buttons" section contains "Edit", "Delete", "Clone", and "Sharing". The "Custom Buttons" section contains "Generate PDF", "Select from All Accounts", "Select from My Accounts", "Bring in My Accounts", and "Select from My Opportunities".

### 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.

The screenshot shows the Salesforce Page Layout Editor interface. At the top, there are buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below these is a 'Quick Find' bar with the text 'Related List Name'. The main area displays a grid of buttons for various related lists. The 'Related Lists' section is expanded, showing a grid of buttons. The 'Target Accounts (Account)' button is highlighted. An arrow points from the 'Target Accounts (Account)' button to the 'Activity History' section below it. Another arrow points from the 'Target Accounts (Account)' button to the 'Target Accounts (Account)' section below it. A third arrow points from the 'Target Accounts (Account)' button to the 'Target Accounts (Account)' section below it.

Subject	Name	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Sample Subject	Sample Name	Sample Related To	✓	6/2/2016 4:56 PM	Sarah Sample	6/2/2016 4:56 PM

**Target Accounts (Account)** New

Target Account: Potential Account

Sample Target Account: Potential Account

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.”

**Related List Properties - Target Accounts (Account)**

[Help](#) ?

**Columns**

Select fields to display on the related list. You can also re-order the selected fields.

**Available Fields**

- TerritoryPlan: Territory Goal #2
- TerritoryPlan: Territory Goal #3
- TerritoryPlan: Territory Goal #4
- TerritoryPlan: Territory Goal - All Opp
- TerritoryPlan: Territory Goal - Closed
- TerritoryPlan: Territory narrative
- TerritoryPlan: Territory sales goal
- TerritoryPlan: Territory sales goal

**Selected Fields**

- Target Account: Potential Account
- TerritoryPlan: TerritoryPlan Name

Sort By: --Default--

☒ Ascending

☐ Descending

**Buttons**

OK Cancel Revert to Defaults

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.

**Target Accounts (Account)** [New Target Account](#) [Target Accounts \(Account\) Help](#) ?

Action	Target Account: Potential Account	TerritoryPlan Name
<a href="#">Edit</a>   <a href="#">Del</a> 0039		BT Mid Mkt Phoenix

### 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

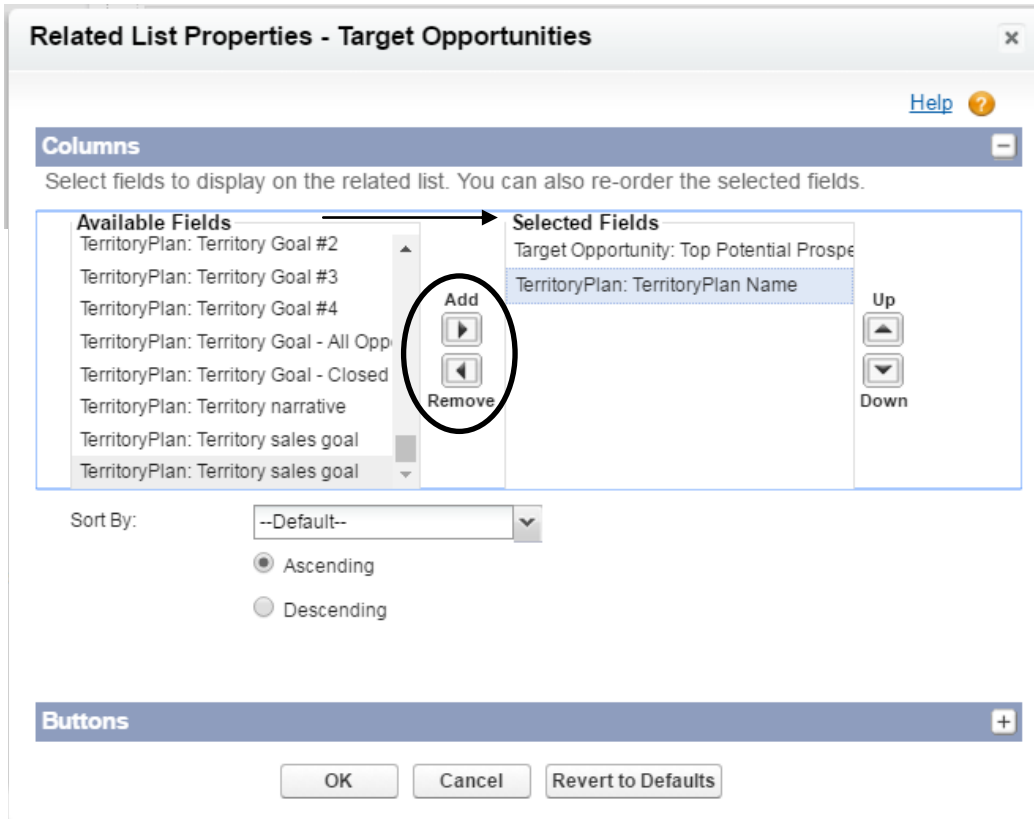
On the left side, select: Related Lists -> Drag Target Opportunities and place it where you want it in the page layout.  
Save.

The screenshot shows the Salesforce Page Layout Editor interface. At the top, there are buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below these is a 'Quick Find' bar with the text 'Related List Name'. A table of related lists is displayed, with columns for 'Related List Name' and 'Add to Page Layout'. The lists include 'Content Deliveries', 'Keywords', 'Partners', 'Target Opportunities', 'Files', 'Notes & Attachments', 'Products', 'Text Ads', 'Google Campaigns', 'Open Activities', 'Search Phrases', 'Groups', 'Opportunities wit...', and 'Stage History'. Below the table, the 'Target Opportunities' section is visible, showing a 'New' button and a sample target opportunity: 'Sample Target Opportunity: Top Potential Prospect'.

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.”



**Related List Properties - Target Opportunities**

[Help](#) ?

**Columns**

Select fields to display on the related list. You can also re-order the selected fields.

**Available Fields**

- TerritoryPlan: Territory Goal #2
- TerritoryPlan: Territory Goal #3
- TerritoryPlan: Territory Goal #4
- TerritoryPlan: Territory Goal - All Opp
- TerritoryPlan: Territory Goal - Closed
- TerritoryPlan: Territory narrative
- TerritoryPlan: Territory sales goal
- TerritoryPlan: Territory sales goal

**Selected Fields**

- Target Opportunity: Top Potential Prospe
- TerritoryPlan: TerritoryPlan Name

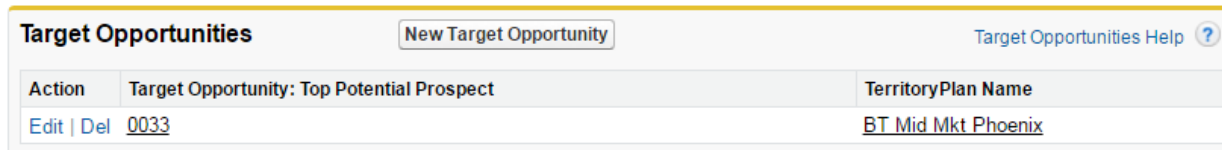
Sort By: --Default--

☒ Ascending  
☐ Descending

**Buttons**

OK Cancel Revert to Defaults

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.



**Target Opportunities** [New Target Opportunity](#) [Target Opportunities Help](#) ?

Action	Target Opportunity: Top Potential Prospect	TerritoryPlan Name
<a href="#">Edit</a>   <a href="#">Del</a> 0033		<a href="#">BT Mid Mkt Phoenix</a>

## 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

## Chatter

### Chatter

- Manage your Chatter settings
- Manage Chat for Chatter Users
- Customize field tracking in your feeds
- Manage Chatter Influence

### 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.

### Feed Tracking

[Help for this Page](#) ?

Enable feed tracking for objects so users can follow records of that object type. Select fields to track so users can see feed updates when those fields are changed on records they follow.

**Fields in territoryplans**

Save Cancel ☒ Enable Feed Tracking [Restore Defaults](#)

You can select up to 20 fields.

Additional issue / info to consider	<input type="checkbox"/>	Additional sales from existing base	<input type="checkbox"/>
Additional sales from existing base	<input type="checkbox"/>	Average opportunity size	<input checked="" type="checkbox"/>
Average opportunity size	<input type="checkbox"/>	Close ratio	<input type="checkbox"/>
Currency	<input type="checkbox"/>	Industry trends impacting your territory	<input type="checkbox"/>
Key trends in your geography	<input type="checkbox"/>	Owner	<input type="checkbox"/>
Territory Goal #1	<input type="checkbox"/>	Territory Goal #2	<input type="checkbox"/>
Territory Goal #3	<input type="checkbox"/>	Territory Goal #4	<input type="checkbox"/>
Territory Goal - All Opportunities	<input type="checkbox"/>	Territory Goal - Closed Opportunities	<input type="checkbox"/>
Territory narrative	<input type="checkbox"/>	Territory sales goal	<input checked="" type="checkbox"/>
Territory sales goal	<input type="checkbox"/>	TerritoryPlan Name	<input checked="" type="checkbox"/>

Save Cancel ☒ Enable Feed Tracking [Restore Defaults](#)

## 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	 <a href="#">Opportunity with Current Account</a>	<a href="#">Territory Plan</a>	<a href="#">TerritoryPlan, Opportunity</a>	<input checked="" type="checkbox"/>	Opportunities with existing accounts
Edit	 <a href="#">Partner</a>	<a href="#">Territory Plan</a>	<a href="#">TerritoryPlan, Account</a>	<input checked="" type="checkbox"/>	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

Partner

### New Custom Field

[Help for this Page](#) ?

Step 2. Enter the details

Step 2 of 4

Previous

Next

Cancel

Field Label

TPP Partner Date

i

Field Name

TPP\_Partner\_Date

i

Description

Date in Partner edit screen

Help Text

Enter Date

i

Required

☐ Always require a value in this field in order to save a record

Default Value

Show Formula Editor

Use formula syntax: e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

### 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

Partner

### New Custom Field

[Help for this Page](#) ?

#### Step 4. Add to page layouts

Step 4 of 4

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Field Label TPP Partner Date  
Data Type Date  
Field Name TPP\_Partner\_Date  
Description Date in Partner edit screen

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Channel Partner Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

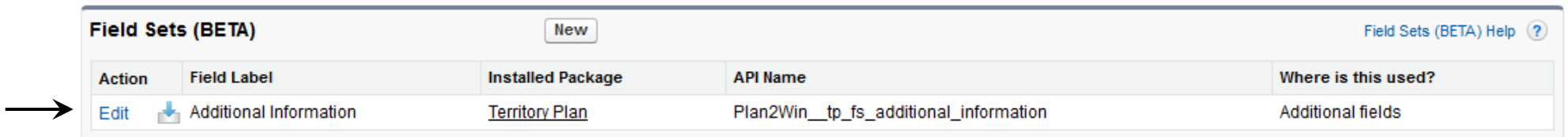


### 16. OPTIONAL: Adding Fields to Edit Pages (Continued)

Set up -> Create -> Click Objects

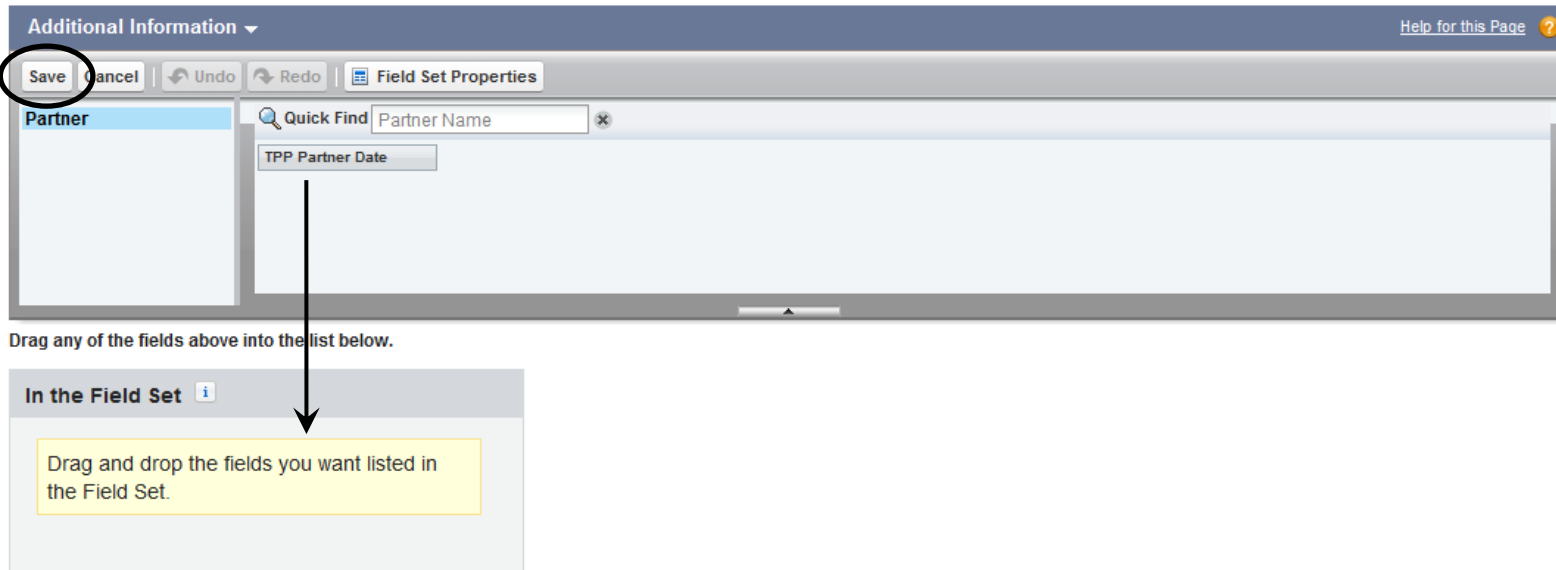
Click on the Object you added the new field to, i.e. Partner (you may already be on this page)

Scroll down to Field Sets -> Click Edit



Action	Field Label	Installed Package	API Name	Where is this used?
<a href="#">Edit</a>	Additional Information	<a href="#">Territory Plan</a>	Plan2Win__tp_fs_additional_information	Additional fields

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



Additional Information ▾ [Help for this Page](#) ?

**Save** **Cancel** **Undo** **Redo** **Field Set Properties**

**Partner**

Quick Find  ✕

TPP Partner Date

Drag any of the fields above into the list below.

**In the Field Set** ⓘ

Drag and drop the fields you want listed in the Field Set.

### 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.

**Partner**

SaveCancelNew Account

**Basic Information**

TerritoryPlanCA Territory

AccountGlobal Media

ContactHoward Jones

Partner relationshipStrategic Alliance (Local)

Our Value to themWe provide great products

Their Value to usThey help customers use our products

Partner strategyWork together to increase business

**Additional Information**

TPP Partner Date2/26/2014 [ 2/26/2014 ]

## 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	 <a href="#">Target Opportunity</a>	<a href="#">Territory Plan</a>	<a href="#">TerritoryPlan, Opportunity</a>	✓	Opportunities with new target accounts
Edit	 <a href="#">TerritoryPlan</a>	<a href="#">Territory Plan</a>		✓	Maintains information regarding Territory Plans
Edit	 <a href="#">TerritoryPlan Summary</a>	<a href="#">Territory Plan</a>		✓	

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.

The screenshot shows the Plan2Win Territory Plan Pro interface. At the top, there is a toolbar with buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below the toolbar is a 'Fields' dialog box. The dialog box has a 'Quick Find' search bar and a list of fields. The 'Section' field is selected, and its details are shown in the table below.

Section	Additional sales ...	Average opportuni...	Existing base % o...	New sales needed	Owner	Sum of Closed Opp...
Blank Space	Average deal % of...	Close ratio	Industry trends i...	New sales needed	Pipeline gap	Sum of Closed Opp...
Additional issue ...	Average deal % of...	Created By	Key trends in you...	Number of new win...	Pipeline needed	Sum of open oppor...
Additional sales ...	Average opportuni...	Existing base % o...	Last Modified By	Number of new win...	Sum of closed opp...	Sum of Open Oppor...

Below the 'Fields' dialog box, there is a table with the following data:

Account: Account Name	Target Account: Priority	Account: Type	Target Account: Account's compelling needs	Target Account: Our differentiators	Target Account: Our sales approach
Sample Account: Account Name	Sample Target Account: Priority	Sample Account: Type	Sample Target Account: Account's compelling needs	Sample Target Account: Our differentiators	Sample Target Account: Our sales approach

Below the table, there is a 'Target Opportunities' section with a 'New' button. The table below shows the data for this section:

Opportunity: Opportunity Name	Account: Account Name	Opportunity: Type	Opportunity: Amount	Opportunity: Stage	Opportunity: Probability (%)	Opportunity: Close Date
Sample Opportunity: Opportunity Name	Sample Account: Account Name	Sample Opportunity: Type	\$123.45	Sample Opportunity: Stage	723%	2/26/2014

Below the 'Target Opportunities' section, there is a 'Partners in your territory' section with a 'New' button. The table below shows the data for this section:

Account: Account Name	Partner: Contact	Partner: Partner relationship	Partner: Our Value to them	Partner: Their Value to us	Partner: Partner strategy
Sample Account: Account Name	Sarah Sample	Sample Partner: Partner relationship	Sample Partner: Our Value to them	Sample Partner: Their Value to us	Sample Partner: Partner strategy

### 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.

**Related List Properties - Partners in your territory**

[Help](#) ?

**Columns**

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields		Selected Fields	
Partner: Created Date	Add Remove	Account: Account Name	Up Down
Partner: Last Modified By		Partner: Contact	
Partner: Last Modified By Alias	Partner: Partner relationship		
Partner: Last Modified Date	Partner: Our Value to them		
Partner: Past Revenue generated		Partner: Their Value to us	
Partner: Record ID		Partner: Partner strategy	
Partner: TPP Partner Date			

Sort By: Account: Account Name

☒ Ascending  
☐ Descending

Apply column information to other page layouts:

**Buttons**

OK Cancel Revert to Defaults

## 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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Global Media</a>	<a href="#">Howard Jones</a>	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

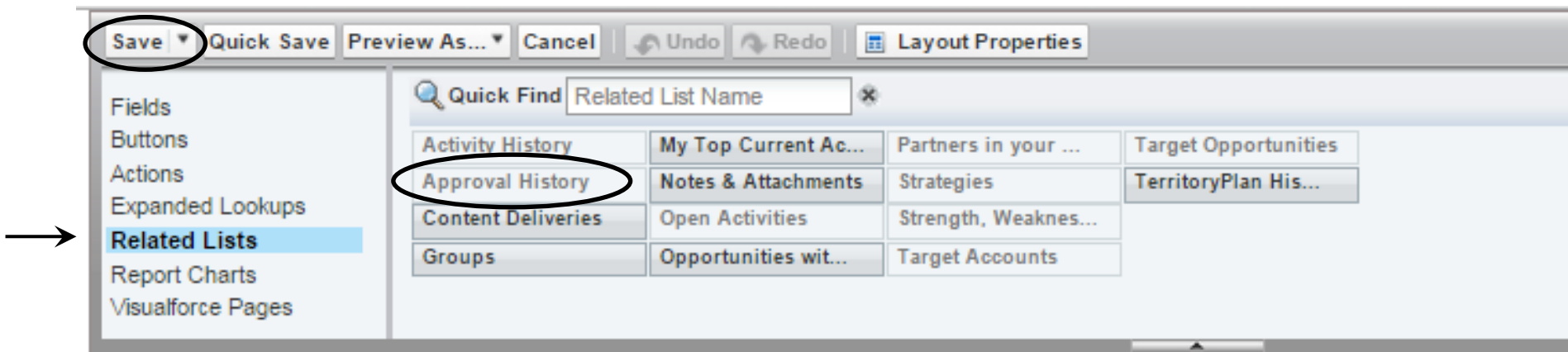
Click on TerritoryPlan.

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.

Opportunity Custom Fields & Relationships						
		New	Field Dependencies		Opportunity Custom Fields & Relationships Help ?	
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Opportunity Booking</a>	<u>Opportunity_Booking__c</u>	Currency(18, 0)			<a href="#">Nilesh Shroff</a> , 11/8/2014 1:50 PM



### 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

[Expand All](#) | [Collapse All](#)

**Salesforce1 Setup**

Force.com Home

System Overview

**Personal Setup**

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings
- My Connected Data

**App Setup**





























- Customize
- Create
- Develop**
  - Apex Classes
  - Apex Triggers
  - Apex Test Execution
  - API
  - Components
  - Custom Permissions
  - Custom Settings
  - Email Services
  - Lightning Components **BETA**
  - Pages**

### Visualforce Pages

Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your users.

View: All [Create New View](#)

A | B | C | D

Action	Label	Name	Namespace Prefix	Api Version	Description
Security    	<a href="#">OpportunityPageSelector</a>	<a href="#">OpportunityPageSelector</a>	Plan2Win	27.0	
Security    	<a href="#">TerritoryPlanSetup</a>	<a href="#">TerritoryPlanSetup</a>	Plan2Win	33.0	
Security    	<a href="#">OpportunityMyPageSelector</a>	<a href="#">OpportunityMyPageSelector</a>	Plan2Win	27.0	
Security    	<a href="#">TerritoryPlanPDF</a>	<a href="#">TerritoryPlanPDF</a>	Plan2Win	21.0	
Security    	<a href="#">OpportunityPageSelector</a>	<a href="#">OpportunityPageSelector</a>	plan2win_ap	27.0	
Security    	<a href="#">OpportunityMyPageSelector</a>	<a href="#">OpportunityMyPageSelector</a>	plan2win_ap	27.0	
Security    	<a href="#">AccountPlanSetup</a>	<a href="#">AccountPlanSetup</a>	plan2win_ap	33.0	
Security    	<a href="#">AccountPlanPDF</a>	<a href="#">AccountPlanPDF</a>	plan2win_ap	15.0	
Security    	<a href="#">AccountMyPageSelector</a>	<a href="#">AccountMyPageSelector</a>	Plan2Win	27.0	
Security    	<a href="#">AccountPageSelector</a>	<a href="#">AccountPageSelector</a>	Plan2Win	27.0	
Security    	<a href="#">TerritoryPlanViewPage</a>	<a href="#">TerritoryPlanViewPage</a>	Plan2Win	22.0	
Security    	<a href="#">UpdateTerritoryPlans</a>	<a href="#">UpdateTerritoryPlans</a>	Plan2Win	25.0	
Security    	<a href="#">NewTopAccount</a>	<a href="#">NewTopAccount</a>	Plan2Win	25.0	
Security    	<a href="#">New Opportunity Target Account</a>	<a href="#">NewOpportunityTargetAccount</a>	Plan2Win	21.0	

### 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.

**Territory Plan Setup**

**Field Setup**

Changing this field changes the field that Territory Plan Pro uses as the opportunity amount. This is used in the Sum of Closed and Open Opportunities and displayed elsewhere in the application. You can use the "Update Territory Plans" button from the View All Territory Plans Page to update this field in plans you have already created.


Opportunity Amount Field API Name

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.


 TerritoryPlans  
**Home**




View: All ▼ Go! [Create New View](#)

**Recent TerritoryPlans** New

TerritoryPlan Name	Created By
<a href="#">CA Territory Plan FY 2015</a>	<a href="#">Ron Snyder</a> , 4/16/2014 9:44 AM
<a href="#">Healthcare Territory Plan</a>	<a href="#">Ron Snyder</a> , 4/15/2014 11:08 PM
<a href="#">Meetify Territory Plan</a>	<a href="#">Ron Snyder</a> , 11/11/2014 12:27 PM

 All ▼ [Create New View](#)

New TerritoryPlan Change Owner Update Territory Plans 

<input type="checkbox"/> Action	TerritoryPlan Name ↑
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   	<a href="#">CA Territory Plan FY 2015</a>
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   	<a href="#">Healthcare Territory Plan</a>
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   	<a href="#">Meetify Territory Plan</a>

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

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

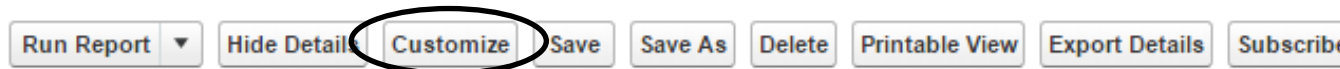
#### Changing Reports:

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

**Select the filter criteria:**

Package

Language

Setup Component

Object

Aspect

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.

Edit TerritoryPlan Custom Field

[Help for this Page](#) ?

### Key trends in your geography (Managed)

 This Custom Field Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Custom Field Definition Edit

Save Cancel

Field Information ! = Required Information

Field Label	Key trends in your geograp	Data Type	Long Text Area
Field Name	tp_what_is_happening_in_		
Namespace Prefix	Plan2Win		
Description	Think about YOUR territory, whether geographic or vertical. There could be a very different perspective, especially if there are significant events in your geography or vertical.		
Help Text	Significant trends/ events in your geography or vertical market. 