

## DreamTeam for Force.com Free Edition Users

Your Salesforce account has 100 free Force.com licenses that you can activate to run third-party applications such as DreamTeam.

You can now extend the reach of the DreamTeam Project Management system to new departments that don't require full Salesforce licenses or to external parties (e.g., contractors) that necessitate limited access.

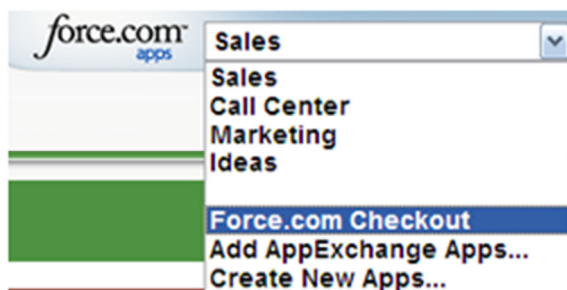
The free force.com licenses are a great way to add new project contributors to your Org and include them in your centralized process for task management and time and expense tracking.

This document explains how to set up DreamTeam to support Force.com Free Edition users in your Org.

### Step 1 – Get Force.com Free Edition Licenses

Visit [www.salesforce.com/platform/freeforce/free\\_force\\_fags.jsp](http://www.salesforce.com/platform/freeforce/free_force_fags.jsp) to learn more about Force.com Free Edition. To set up Free Edition licenses in your Org, follow the steps below:

1. Log in to your Salesforce Org.
2. Select "Force.com Checkout" in the "Force.com Apps" Menu. If this is your first visit to Checkout, a portal user will automatically be created and you will receive an email. After receiving the email, proceed to Force.com Checkout. (Note: If you do not have access to Checkout, contact your Salesforce sales representative).



3. In the Quote window, you will see 5 tabs across the top: Basic Information, Salesforce Edition, Additional Products, Partner Products, Quote Summary. On the Editions tab, select "Force.com Free Edition." The Quantity defaults to 100. The price is \$0.
4. Continue through to the Quote Summary tab and select the "Checkout" button.
5. Continue through to the Order Review tab, click the box to agree to the legal terms, then select "Place Order" button.
6. You will receive an email that your order has been placed.

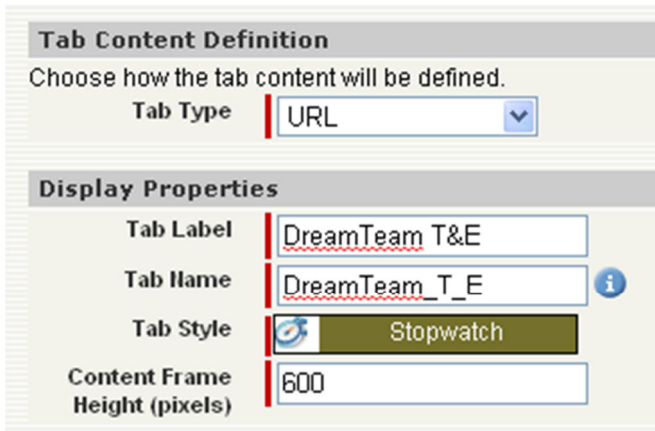
## Step 2 – Install DreamTeam in your Org

If you've already installed DreamTeam, you can skip this step.

1. Go to [www.appexchange.com](http://www.appexchange.com).
2. Search for "DreamTeam."
3. Select "DreamTeam Project Management."
4. Click on the red "Get It Now" button.
5. Follow the instructions to install DreamTeam in your Org. (Note: You must be a Salesforce Administrator to install DreamTeam).

## Step 3 – Create "DreamTeam Time & Expense" Tab

1. In Salesforce Setup, go to App Setup > Create > Tabs.
2. Select to create a new web tab.
3. In Step 1, select Full page width.
4. In Step 2, select URL as tab type and specify tab label, name, style and content frame.



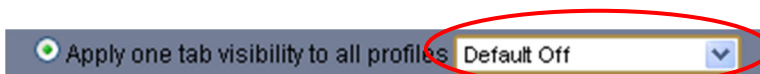
The screenshot shows the configuration interface for a new web tab in Salesforce. It is divided into two main sections: "Tab Content Definition" and "Display Properties".

- Tab Content Definition:** The "Tab Type" is set to "URL".
- Display Properties:**
  - Tab Label:** "DreamTeam T&E"
  - Tab Name:** "DreamTeam\_T\_E" (with an information icon to the right)
  - Tab Style:** "Stopwatch" (with a preview icon to the left)
  - Content Frame Height (pixels):** "600"

5. In Step 3, copy the following text into the Link URL text area:

```
https://www.dreamfactory.net/sforce/dreamteam/collaborative_calendar.html?  
sforce_session_id={!API.Session_ID}&  
sforce_server_url={!API.Partner_Server_URL_120}&  
sforce_user_name={!User.Username}&  
sforce_full_name={!User.Name}&  
sforce_user_id={!User.Id}&  
custom_appl_flags=project manager, database, snapshot, import26%export, document manager,  
timesheet editor, project reporter, application builder
```

6. In Step 4, set default tab visibility to Off for all profiles.

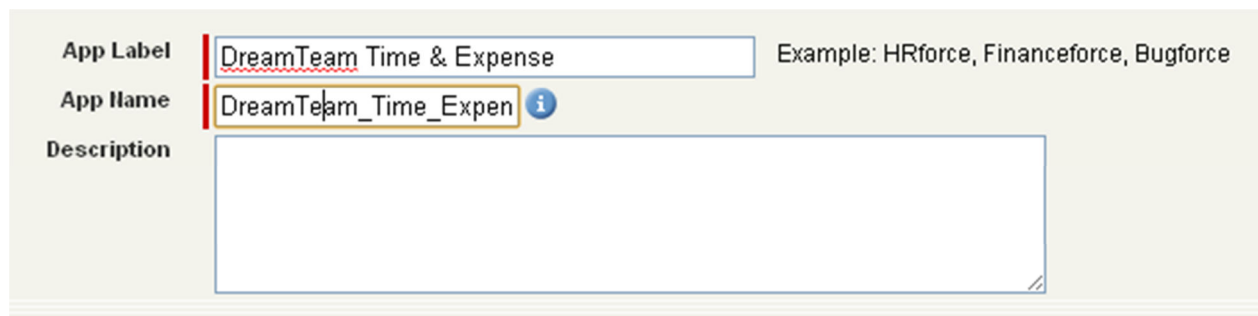


The screenshot shows a dropdown menu with the text "Apply one tab visibility to all profiles" and a selected option "Default Off". The dropdown arrow is visible on the right side.

7. In Step 5, uncheck “Include Field.”
8. Click Save to save the tab.

#### Step 4 – Create “DreamTeam Time & Expense” Application

1. In Salesforce Setup, go to App Setup > Create > Apps.
2. Select to create a new app.
3. In Step 1, specify an app label and name.



App Label: DreamTeam Time & Expense Example: HRforce, Financeforce, Bugforce

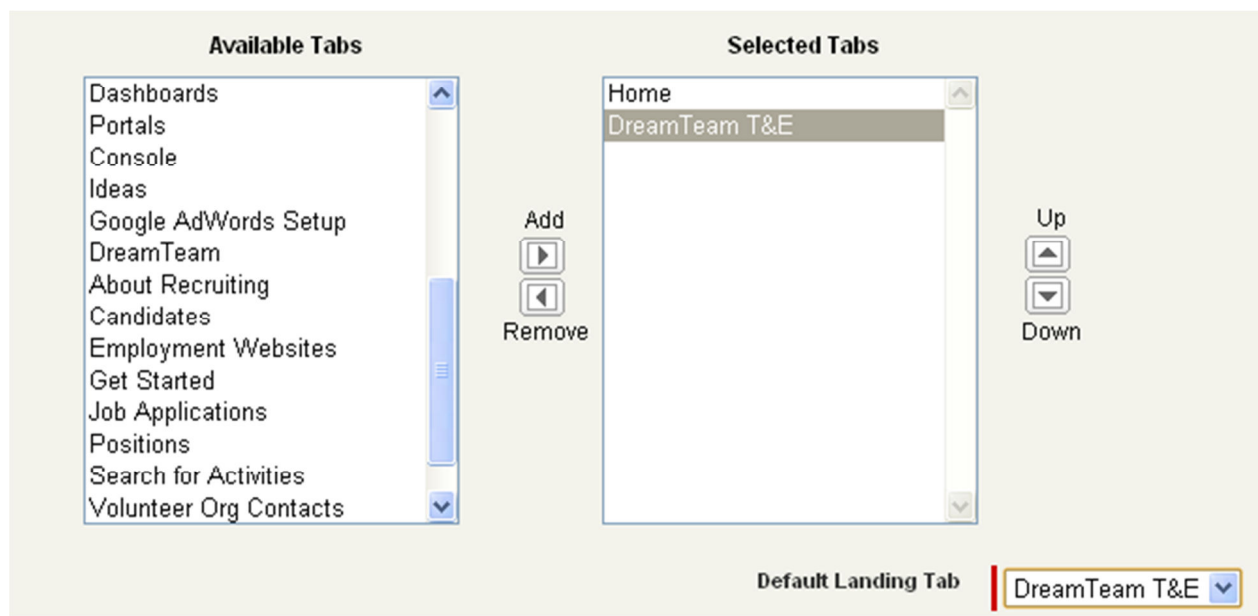
App Name: DreamTeam\_Time\_Expens

Description:

4. In Step 2, select the DreamFactory logo.



5. In Step 3, add the DreamFactory T&E tab to the application and set this tab as the default landing tab.



Available Tabs

- Dashboards
- Portals
- Console
- Ideas
- Google AdWords Setup
- DreamTeam
- About Recruiting
- Candidates
- Employment Websites
- Get Started
- Job Applications
- Positions
- Search for Activities
- Volunteer Org Contacts

Add Remove

Selected Tabs

- Home
- DreamTeam T&E

Up Down

Default Landing Tab: DreamTeam T&E

6. In Step 4, don't make any changes. We'll assign the new application to a profile later.
7. Click Save to save the application.

### Step 5 – Create “DreamTeam Time & Expense” Profile

1. In Salesforce Setup, go to Administration Setup > Manage Users > Profiles.
2. Select to create a new profile.
3. Select “Force.com – Free User” as the existing profile and enter a name for the new profile (e.g., DreamTeam Time & Expense).

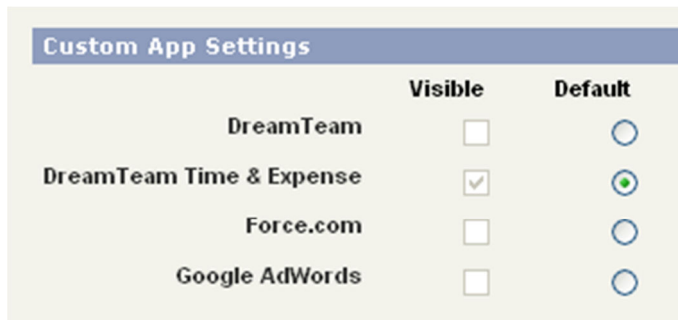


Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Force.com - Free User
User License	Force.com - Free
Profile Name	DreamTeam Time & Expe

4. Click Save to save the profile.
5. Click Edit to edit profile settings.
6. In Custom App Settings, set “DreamTeam Time & Expense” as the default application.



	Visible	Default
DreamTeam	<input type="checkbox"/>	<input type="radio"/>
DreamTeam Time & Expense	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Force.com	<input type="checkbox"/>	<input type="radio"/>
Google AdWords	<input type="checkbox"/>	<input type="radio"/>

7. In Tab Settings, hide all tabs except DreamTeam T&E.

**Tab Settings**

Overwrite users' personal tab customizations

**Standard Tab Settings**

Home Default On

Console Tab Hidden

Dashboards Tab Hidden

Documents Tab Hidden

Reports Tab Hidden

**Custom Tab Settings**

About Recruiting Tab Hidden

Candidates Tab Hidden

DreamTeam Tab Hidden

DreamTeam T&E Default On

Employment Websites Tab Hidden

Get Started Tab Hidden

Google AdWords Setup Tab Hidden

Job Applications Tab Hidden

Positions Tab Hidden

Search for Activities Tab Hidden

Volunteer Activities Tab Hidden

Volunteer Organizations Tab Hidden

Volunteer Org Contacts Tab Hidden

- In Custom Object permissions, check Read, Write, Edit and Delete permissions for all DreamTeam custom objects.

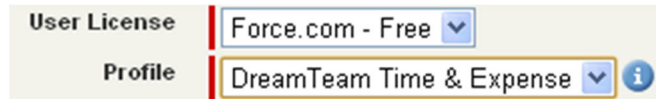
**Custom Object Permissions**

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Ad Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Candidates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carousels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DreamFactory Shared Views	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DreamTeam Action Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DreamTeam Discussions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DreamTeam Expenses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DreamTeam Highlights	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DreamTeam Issues	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DreamTeam Linkers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DreamTeam Projects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DreamTeam Resources	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DreamTeam Tasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DreamTeam Times	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Click Save to save profile settings.

## Step 6 – Assign Free Edition Users to “DreamTeam Time & Expense” Profile

1. In Salesforce Setup, go to Administration Setup > Manage Users > Users.
2. Select to create a new user.
3. Fill in all required user fields. Set user license to “Force.com – Free” and profile to “DreamTeam Time & Expense.”

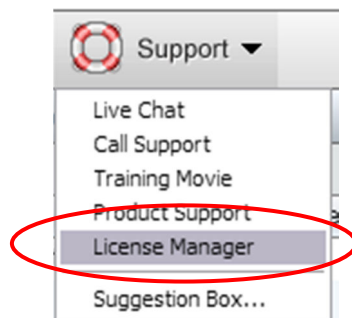


The screenshot shows two dropdown menus. The first is labeled "User License" and is set to "Force.com - Free". The second is labeled "Profile" and is set to "DreamTeam Time & Expense".

4. Click Save to save the new user.

## Step 7 – Add DreamTeam Licenses

1. In DreamTeam, select Support > License Manager.



2. Follow licensing instructions.