

GamePlan Quick Start Guide

This document provides step by step instructions regarding the installation and implementation of GamePlan.

How to Install GamePlan

To install the Game Plan application into your Salesforce Org, please follow the steps below:

1. Click on the link below to go to the GamePlan listing on the Salesforce AppExchange

<https://sites.secure.force.com/appexchange/listingDetail?listingId=a0N30000003J5oIEAS>

2. Once on the GamePlan listing click on the red “Get It Now” button.

The screenshot shows the Salesforce AppExchange interface. At the top, the 'appexchange' logo is on the left, and navigation links for 'salesforce.com', 'Customer Resources', and 'Developer Force' are on the right. Below the logo is a navigation bar with 'Home', 'Apps', 'Services', and 'Publishing'. On the left side, there is a search bar and a list of 'Popular Categories' including ChatterExchange, Dashboards & Reports, Project Management, Mass Emails, and Accounting/Finance. The main content area displays the 'GamePlan Strategic Account Mapping' app listing. The app is categorized under 'Sales > Sales Methodologies, Sales > Sales Operations'. The app icon shows a green chalkboard with a diagram. The app title is 'Cloud Powered Collaborative Diagrams' with the subtitle 'Implement Sales Methodologies, Strategic Account Plans, and Opportunity Requirements!'. Below the title, the app is identified as 'GamePlan Strategic Account Mapping' by DreamFactory Software, Inc., dated 2/8/2011. A description states: 'GamePlan is a visual approach to managing Accounts and Opportunities. Enhance collaboration by diagramming strategic sales campaigns involving products, opportunities, partners, and competitors. Create high resolution maps with PDF, picture, or print.' To the right of the description are buttons for 'Never Reviewed', 'Paid', 'Support', and 'Add To Saved'. A red 'Get It Now' button is prominently displayed. Below the description, there are tabs for 'Overview', 'Spec', 'Support', and 'Provider'. The 'Overview' tab is selected, showing 'Highlights' and 'Pricing'. The 'Highlights' section lists features like drag & drop data-driven shapes, dynamic connections, template configuration, and freehand annotations. The 'Pricing' section indicates the app is 'Paid' and offers a '1 Week Free Trial' with contact information for sales@dreamfactory.com. At the bottom right, there are buttons for 'Play App Demo' and 'View Screenshots'.

appexchange²
the cloud computing marketplace

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- Mass Emails
- Accounting/Finance

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- Snapshot Release Manager
- FormFactory Quotes & Invoices
- TableTop Dashboards and Reports
- Enterprise Class Document Manager
- DreamFactory Utilities For Admins

Categories: Sales > Sales Methodologies, Sales > Sales Operations

Cloud Powered Collaborative Diagrams
Implement Sales Methodologies, Strategic Account Plans, and Opportunity Requirements!

GamePlan Strategic Account Mapping
App by DreamFactory Software, Inc. 2/8/2011

GamePlan is a visual approach to managing Accounts and Opportunities. Enhance collaboration by diagramming strategic sales campaigns involving products, opportunities, partners, and competitors. Create high resolution maps with PDF, picture, or print.

Never Reviewed

Paid

Support

Add To Saved

Get It Now

(Write the first)

Overview Spec Support Provider

Highlights

- Drag & drop data-driven shapes, and instantly draw connections that update dynamically in Salesforce.
- Configure templates to implement your sales methodology or take advantage of included templates.
- Create freehand annotations on your opportunity maps and save in Salesforce.com

Pricing

- Paid
- 1 Week Free Trial. Please contact sales@dreamfactory.com for pricing.

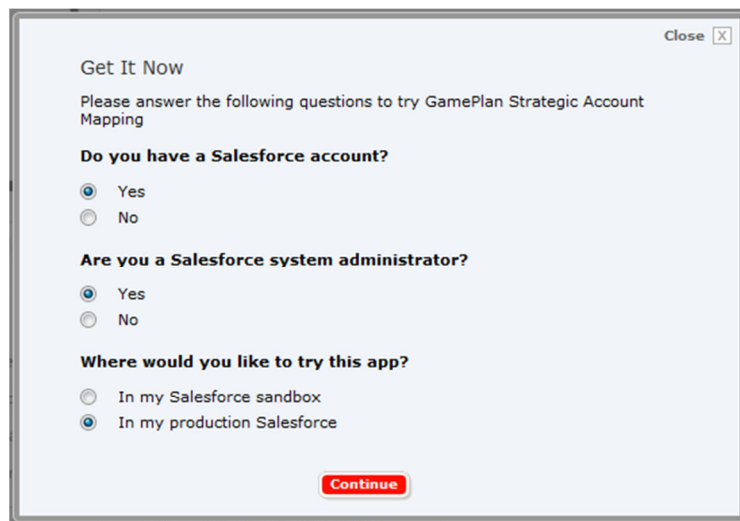
Please contact us for more information.

- 888-399-3732
- [Website](#)
- [Email](#)

Play App Demo

View Screenshots

3. Enter the 3 Get It Now questions from Salesforce in the dialog below and then click the red continue button.



Get It Now Close X

Please answer the following questions to try GamePlan Strategic Account Mapping

Do you have a Salesforce account?

☒ Yes
☐ No

Are you a Salesforce system administrator?

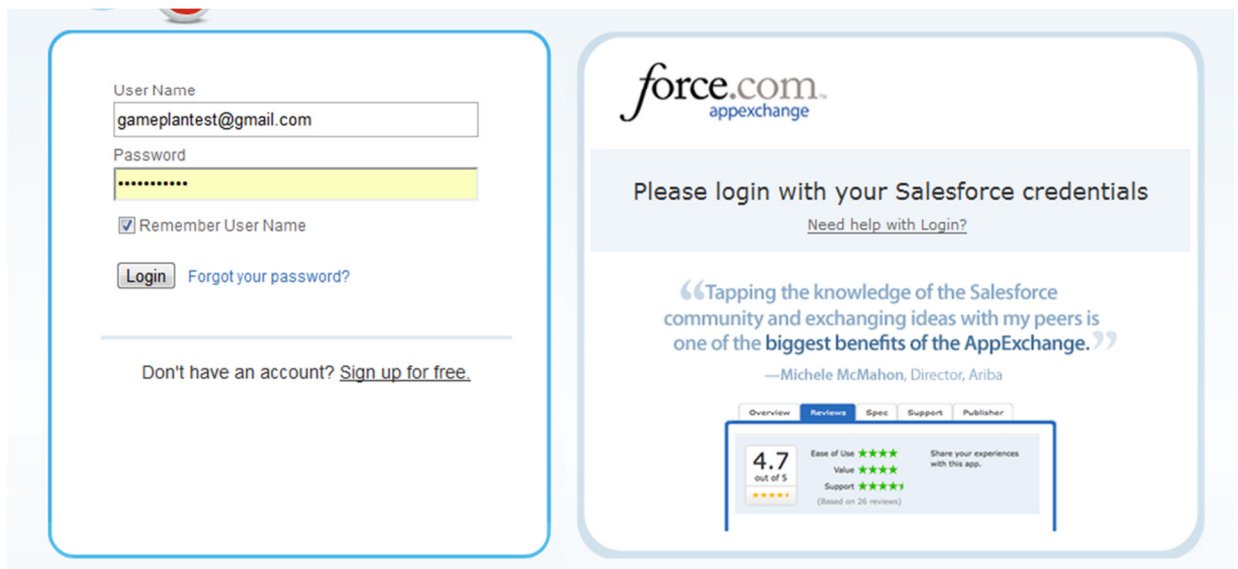
☒ Yes
☐ No

Where would you like to try this app?

☐ In my Salesforce sandbox
☒ In my production Salesforce

Continue

4. Log back in to your Salesforce Org



User Name
gameplantest@gmail.com

Password
.....

☒ Remember User Name

Login [Forgot your password?](#)

Don't have an account? [Sign up for free.](#)

force.com
appexchange

Please login with your Salesforce credentials
[Need help with Login?](#)

“Tapping the knowledge of the Salesforce community and exchanging ideas with my peers is one of the **biggest benefits of the AppExchange.**”
—Michele McMahon, Director, Ariba

Overview **Reviews** Specs Support Publisher

4.7
out of 5
(Based on 26 reviews)

Ease of Use ★★★★★
Value ★★★★★
Support ★★★★★

Share your experiences with this app.

5. Once you log in, the Confirm Installation dialog box will appear. Simply check the I have read and agree to the terms and conditions check box and then click the red Install button to initiate the installation.

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Adam (gameplantest@gmail.com)

Home Apps Services Publishing MY SAVED LIST Logout

Confirm Installation

GamePlan Strategic Account Mapping
App by DreamFactory Software, Inc.

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please click [here](#) for detailed information on what is and is not included in this review.

Installation Instructions

Thank you for your interest in installing GamePlan Strategic Account Mapping. Please take the following steps to install this application:

1. Review the application and subscription information to understand what you are installing.
2. Review the organization and user information to ensure that you are installing this application in the right environment.
3. Read and agree to the terms & conditions.
4. Click the Install button to start the installation process.

What You Are Installing		Where You Are Installing	
Package:	GamePlan Strategic Account Mapping	Organization:	DreamFactory Software
Version:	GamePlan (GamePlan / 1.1.0)	Edition:	Developer Edition
Subscription:	Free	User Name:	gameplantest@gmail.com
Duration:	Does Not Expire		(Logout and try again as a different user)
Number of Subscribers:	Site-wide		

☒ I have read and agree to the [terms & conditions](#).

1-800-NO-SOFTWARE | Home | Privacy Statement | Terms of Use | Choose Your Language

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6. You will be prompted to enter your Salesforce password to proceed.

Close X

Please verify your Password


To protect your account, you need to confirm your Password.

Password:

7. Once you enter your password, the next screen that you see is the Package Installation Details screen. Simply click the orange continue button.

Package Installation Details Help for this Page

Package Name	GamePlan
Version Name	GamePlan
Version Number	1.1
Publisher	DreamFactory Software, Inc.
Description	

 **Continue** Cancel

Package Components

▼ Apps (1)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	GamePlan		App	This is a brand new component.

▼ Fields (45)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Extra Field	Map Information	Custom Field	This is a brand new component.
Create	Over3	Map Information	Custom Field	This is a brand new component.
Create	Over2	Map Template	Custom Field	This is a brand new component.
Create	Importance	Requirements Object	Custom Field	This is a brand new component.
Create	Flag3	Map Information	Custom Field	This is a brand new component.
Create	Mission Critical	Requirements Object	Custom Field	This is a brand new component.
Create	Flag2	Map Template	Custom Field	This is a brand new component.
Create	Flag3	Map Template	Custom Field	This is a brand new component.
Create	Flag1	Map Information	Custom Field	This is a brand new component.

8. Next, click on the Next button on the Approve Package API Access page to continue

Package Installer Help for this Page

GamePlan

Step 1. Approve Package API Access Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

Components in this package will have the user's full API access to the following custom objects included in the package:

- Requirements Object
- Map Information
- Initiatives Object
- Map Template

Extended Object Permissions


	Read	Create	Edit	Delete
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

This Package will not be able to use any of the Administrative Privileges from the user's Profile.

 **Next** Cancel

9. Next, choose the desired security level and click next

Package Installer
GamePlan

Help for this Page

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

10. Click the Install button to continue

Package Installer
GamePlan

Help for this Page

Step 3. Install Package Step 3 of 3

The package is ready to be installed. Click install to continue.

Previous Install Cancel

11. Once the installation is complete, you will be prompted to either Deploy Now or Later. I tis recommended to Deploy Now.

Install complete

Help for this Page

The components contained in this package have been successfully installed.

The final steps in the install process are to:

1. Change the visibility settings for any installed documents, reports, dashboards, letterheads, email templates, and custom fields on standard objects. By default, these components are visible to all users.
2. Set the Running User for any installed dashboards or analytic snapshots; by default, it is set to you.
3. Specify the appropriate recipients for any installed workflow tasks.
4. Specify the appropriate assignees for any installed workflow alerts.
5. Specify the appropriate user for workflow field updates that modify the Owner field or user lookups; by default, it is set to you.
6. Create a schedule for any installed analytic snapshots.
7. Configure any additional settings for this package from the package detail page.
8. Deploy the package by clicking Deploy Now below. You can also do this at any time in the future from the package detail page.

Deploy Now Deploy Later

12. Then you will be prompted to Deploy the Package contents which is also recommended

Deploy Package

Help for this Page

Click Deploy to make Custom Objects, Workflow Rules, or Custom Report Types in this package available to users who have access to them based on their profile.

Package Components

Action	Name	Parent Object	Type
	Initiatives Object		Custom Object
	Map Information		Custom Object
	Map Template		Custom Object
	Requirements Object		Custom Object

Deploy Cancel

13. Once GamePlan has officially been installed, it will be accessible from the Force.com Menu in the top right corner of the Salesforce Screen.

The screenshot displays the Salesforce user interface. At the top right, the user's name 'Adam Buxbaum' is shown next to a 'Force.com' dropdown menu. The dropdown menu is open, showing a list of applications: Sales, Call Center, Marketing, Community, Salesforce Chatter, GamePlan (which is circled in green), Add AppExchange Apps..., and Create New Apps... A red arrow points from the 'Force.com' text to the dropdown menu.

The main content area shows the 'Package Details' for 'GamePlan'. It includes a 'Back to List: Accounts' link, 'Uninstall', 'Deploy', and 'Show Dependencies' buttons. The package information is as follows:

Field	Value
Package Name	GamePlan
Language	English
Version Number	1.1
Package Type	Unmanaged
Version Name	GamePlan
Publisher	DreamFactory Software, Inc.
Modified By	Adam Buxbaum, 2/8/2011 11:59 AM
Description	Strategic account mapping and visualization tool.
Installed By	Adam Buxbaum, 2/8/2011 11:59 AM

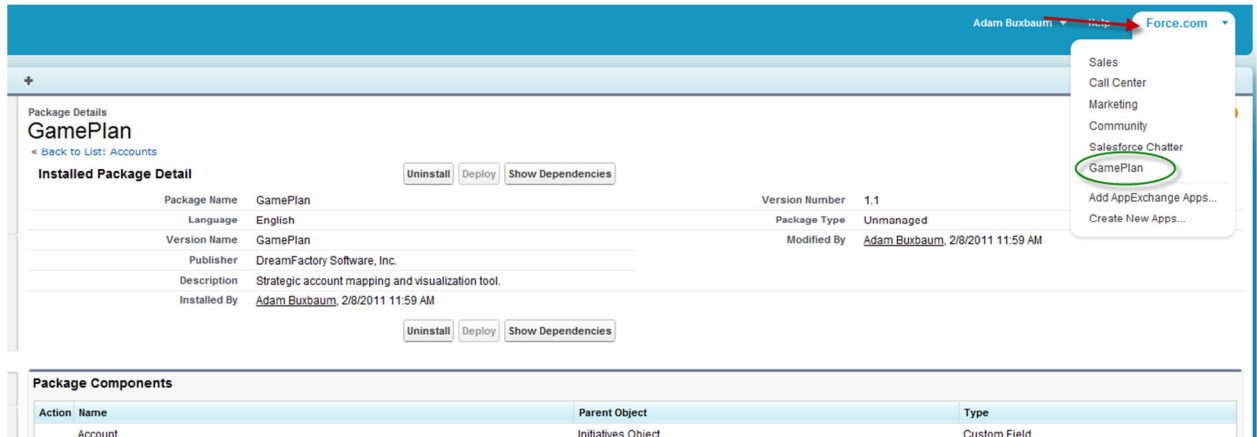
Below the package details, there is a 'Package Components' section with a table showing the relationship between the package and its components:

Action	Name	Parent Object	Type
	Account	Initiatives Object	Custom Field

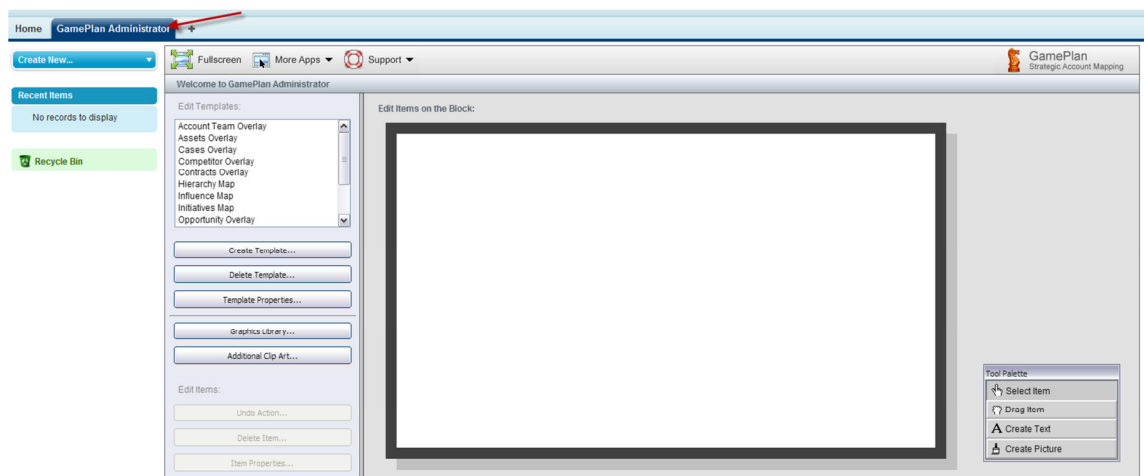
How to Initiate a Free Trial of GamePlan

To initiate a free trial of GamePlan follow the directions below:

1. Select GamePlan from the Force.com Menu



2. Next, click on the GamePlan Administrator tab to launch GamePlan



3. Once GamePlan loads, click on the Support Menu and select the License Manager



4. Next, select the I want to evaluate GamePlan radio button and click the Next button

The screenshot shows the 'DreamFactory License Manager' interface with the 'GamePlan' logo. The 'Select Users' tab is active. A message states: 'Step 1) Your organization does not currently have a GamePlan license. Please tell us what you would like to do, then click the button at right to advance.' Below this, the 'Select Product' dropdown is set to 'GamePlan'. There are four radio button options: 'I want to evaluate GamePlan' (selected), 'I want to purchase GamePlan', 'I want to renew our existing GamePlan license', and 'I want to add users or make other changes to our current GamePlan license'. A red arrow points to the selected radio button, and another red arrow points to the 'Next' button in the top right corner.

5. Type either the word All or the name of the user that you want to give access to GamePlan to and click the search button. A list of users will appear in the Found User box.

The screenshot shows the 'Step 2) Please select the named users to be included in your GamePlan evaluation. When your list of named users is complete, click the button at right to advance.' The 'Include all users in evaluation' checkbox is unchecked. The 'Search for Users:' dropdown is set to 'by user name'. Below it, the 'Enter a user name:' field contains the text 'All'. A red arrow points to the 'Search' button. To the right, the 'Found Users:' box contains a single entry: 'Adam Burbaum'. The 'Named Users:' box is empty. A green arrow button is visible between the 'Found Users' and 'Named Users' boxes.

6. Select the name of the user in the Found User Box and click the green arrow to move them over to the Named Users box and then click the Next button.


This screenshot shows the same interface as the previous one, but now the 'Named Users:' box contains the entry 'Adam Burbaum'. The green arrow button between the 'Found Users' and 'Named Users' boxes is highlighted with a green circle. A red arrow points to the 'Next' button in the top right corner.

7. Enter the information in the red highlighted boxes and then click Next

DreamFactory License Manager GamePlan™

Account Login | Request Action | Select Users | **Contact Information** | License Agreement | Generate Order

Step 3) Please verify your contact and billing information. The Promotional Code has been set for product evaluation.



Company: DreamFactory Software

Admin Name: Adam Buxbaum (The administrator is notified about license status)

Admin Email: gameplantest11@gmail.com


Admin Telephone:

Billing Contact: Adam Buxbaum (The invoice is sent to the billing contact)

Billing Email: gameplantest11@gmail.com

Billing Telephone:

Billing Address: GA 30022 (The billing address is required information)




8. Check the check box that says I agree on the left side of the screen and then click the Next button to continue.


DreamFactory License Manager GamePlan™

Account Login | Request Action | Select Users | **Contact Information** | **License Agreement** | Generate Order

Step 4) Please read the following License Agreement carefully and click the check box below to continue.

☒ I Agree 

☐ I Am A Referenceable Client



IMPORTANT-READ CAREFULLY: YOUR USE OF THE DREAMFACTORY PRODUCTS AND ASSOCIATED PRODUCTS IS CONDITIONED UPON YOUR COMPLIANCE AND ACCEPTANCE OF THESE TERMS. BY CLICKING THE "I AGREE" BUTTON OR BY UTILIZING THE DREAMFACTORY PRODUCTS YOU AGREE TO BE BOUND BY THESE TERMS AND CONDITIONS. THE DREAMFACTORY PRODUCTS ARE NOT AVAILABLE TO PERSONS UNDER 13 YEARS OF AGE. This is a legal agreement ("Agreement") between You and DreamFactory Software, Inc. ("DreamFactory"), for use of the DreamFactory products which You selected or initiated, which may include DreamTeam, Carousel, FormFactory, DealFlow, SnapShot, OrgView, or other products provided by DreamFactory ("Products"). "You" refers to the individual who registered and/or provided DreamFactory his or her credit card or other payment mechanism for the Products or, if the Products are being purchased on behalf of an entity by an individual authorized to purchase the Products on behalf of such entity, then "You" refers to such entity. If You do not agree with the terms of this Agreement, click the "Cancel" button and do not use the Products. Any software associated with the Products is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties.

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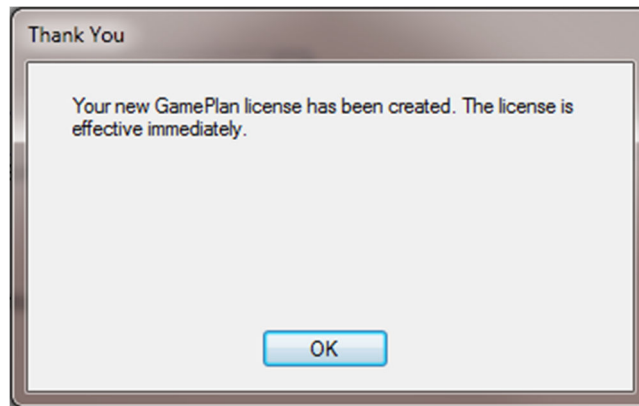
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9. On the Generate Order tab, simply click on the Finish button

The screenshot shows the 'DreamFactory License Manager' interface. At the top, there's a navigation bar with tabs: 'Account Login', 'Request Action', 'Select Users', 'Contact Information', 'License Agreement', and 'Generate Order'. The 'Generate Order' tab is active. Below the tabs, a message reads: 'Step 5) Please select a term for the license and make sure that the following order looks correct, then click the button at right to enable your license.' There is a 'Select License Term:' dropdown menu currently set to 'One Year'. To the right of this menu are 'Save' and 'Finish' buttons. A red arrow points to the 'Finish' button. Below the menu is a scrollable box titled 'GamePlan Order Form' containing the following details: Company Name: DreamFactory Software, Product: GamePlan, Platform: sfcore, License Date: 2/8/2011 3:14 PM, Referenceable: true, Organization Type: Developer Edition, Total Users in Org: 1, Named User Count: 1, Purchased User Count: 99999, Evaluation: false, Credit Card Authorization: NA, Admin Name: Adam Buxbaum, Admin Email: gameplantest11@gmail.com, Admin Telephone: 650-641-8227, Billing Name: Adam Buxbaum, Billing Email: gameplantest11@gmail.com, Billing Telephone: 650-641-8227, Billing Address: DreamFactory Software. To the right of the scrollable box are two radio buttons: 'Bill me later' (selected) and 'Pay by Credit Card'.

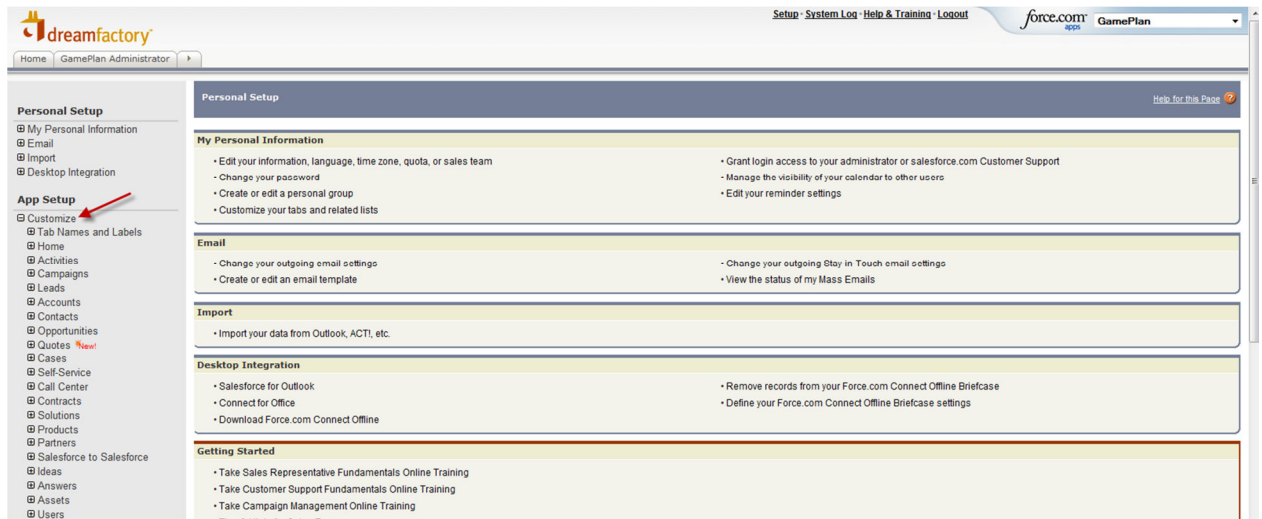
10. Once you click on the finish button, the following dialog box will appear activating your trial.



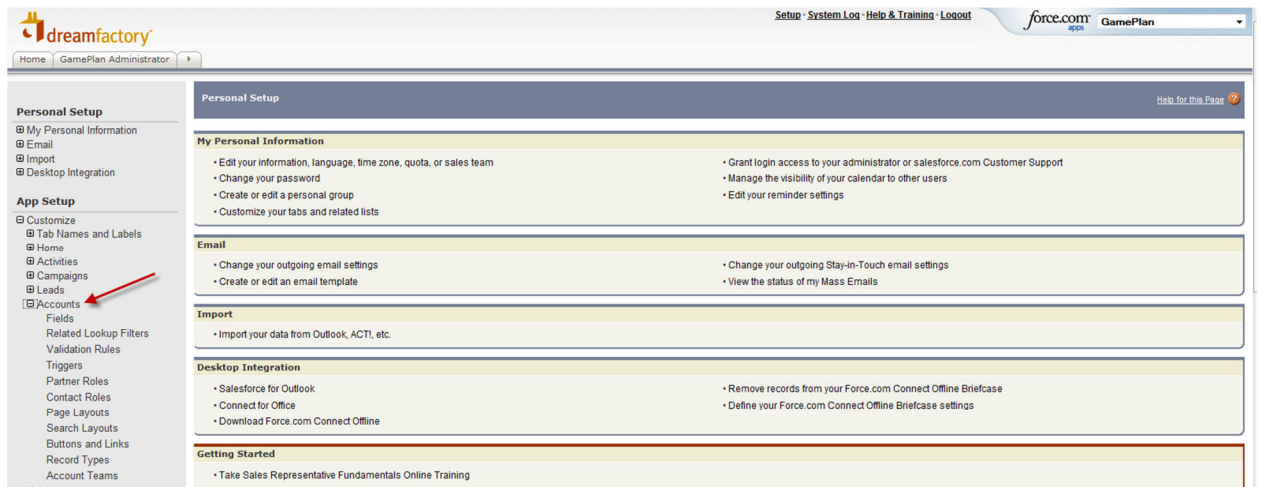
Linking a Template in Salesforce Account

Once you have setup your templates, you can easily create links to these templates in your Salesforce Account. To do this is extremely easy. A number of buttons are shipped with GamePlan, but to add a new button or link simply follow the directions below.

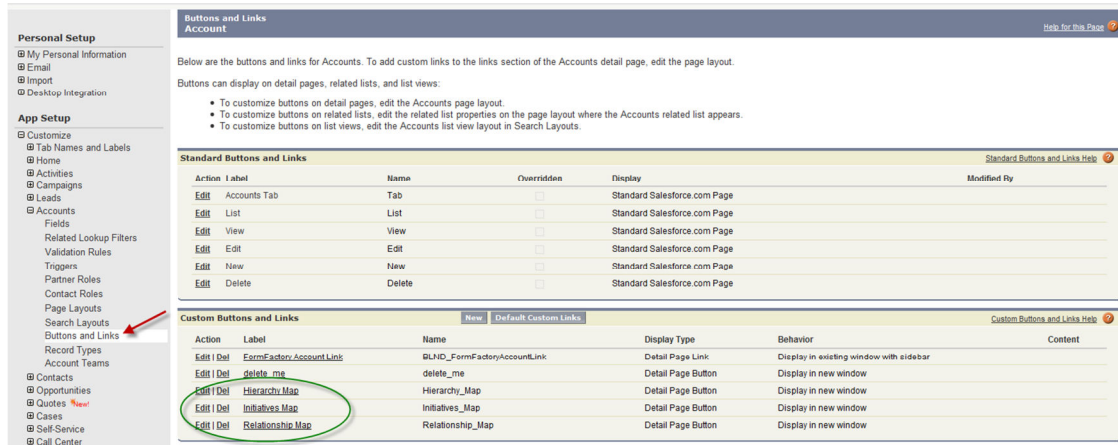
1. Go into Salesforce Setup
2. Go to Customize



3. Next, click on Accounts



- Buttons and Links. You will see the buttons and links that are installed with GamePlan on the bottom including Relationship Map, Initiatives Map and Hierarchy Map.



Buttons and Links Account

Below are the buttons and links for Accounts. To add custom links to the links section of the Accounts detail page, edit the page layout.

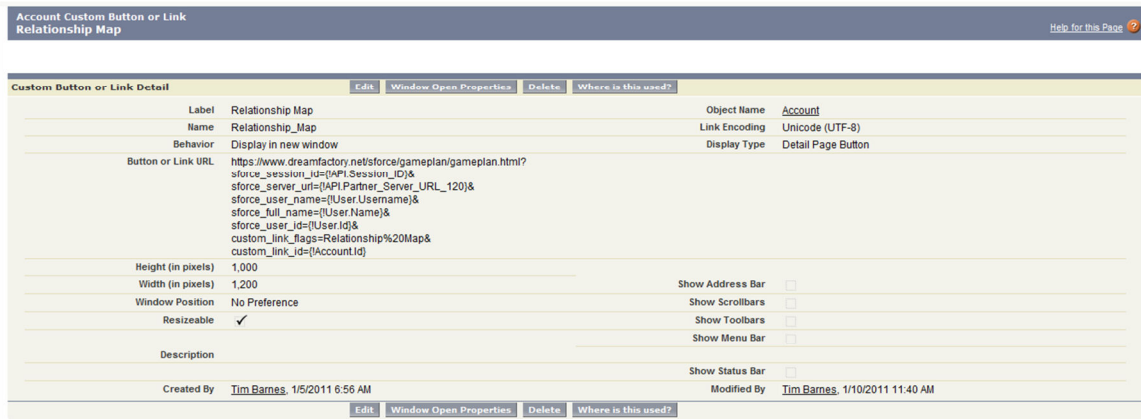
Buttons can display on detail pages, related lists, and list views:

- To customize buttons on detail pages, edit the Accounts page layout.
- To customize buttons on related lists, edit the related list properties on the page layout where the Accounts related list appears.
- To customize buttons on list views, edit the Accounts list view layout in Search Layouts.

Action	Label	Name	Overridden	Display	Modified By
Edit	Accounts Tab	Tab	<input type="checkbox"/>	Standard Salesforce.com Page	
Edit	List	List	<input type="checkbox"/>	Standard Salesforce.com Page	
Edit	View	View	<input type="checkbox"/>	Standard Salesforce.com Page	
Edit	Edit	Edit	<input type="checkbox"/>	Standard Salesforce.com Page	
Edit	New	New	<input type="checkbox"/>	Standard Salesforce.com Page	
Edit	Delete	Delete	<input type="checkbox"/>	Standard Salesforce.com Page	

Action	Label	Name	Display Type	Behavior	Content
Edit Del	FormFactory Account Link	DLID_FormFactoryAccountLink	Detail Page Link	Display in existing window with sidebar	
Edit Del	delete_me	delete_me	Detail Page Button	Display in new window	
Edit Del	Hierarchy Map	Hierarchy_Map	Detail Page Button	Display in new window	
Edit Del	Initiatives Map	Initiatives_Map	Detail Page Button	Display in new window	
Edit Del	Relationship Map	Relationship_Map	Detail Page Button	Display in new window	

- Click on one of the buttons to look at the actual link. Each one of these links needs a single URL that links to the runtime side of GamePlan. You need to add two special parameters at the bottom of the link. One for custom link flags which is for the name of the custom map and one for custom link ID which is the ID for the object that the button is for.



Account Custom Button or Link Relationship Map

Custom Button or Link Detail

Label: Relationship Map

Name: Relationship_Map

Behavior: Display in new window

Button or Link URL: https://www.dreamfactory.net/force/gameplan/gameplan.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_link_flags=Relationship%20Map&custom_link_id={Account.Id}

Height (in pixels): 1,000

Width (in pixels): 1,200

Window Position: No Preference

Resizable: ☒

Description:

Object Name: Account

Link Encoding: Unicode (UTF-8)

Display Type: Detail Page Button

Show Address Bar: ☐

Show Scrollbars: ☐

Show Toolbars: ☐

Show Menu Bar: ☐

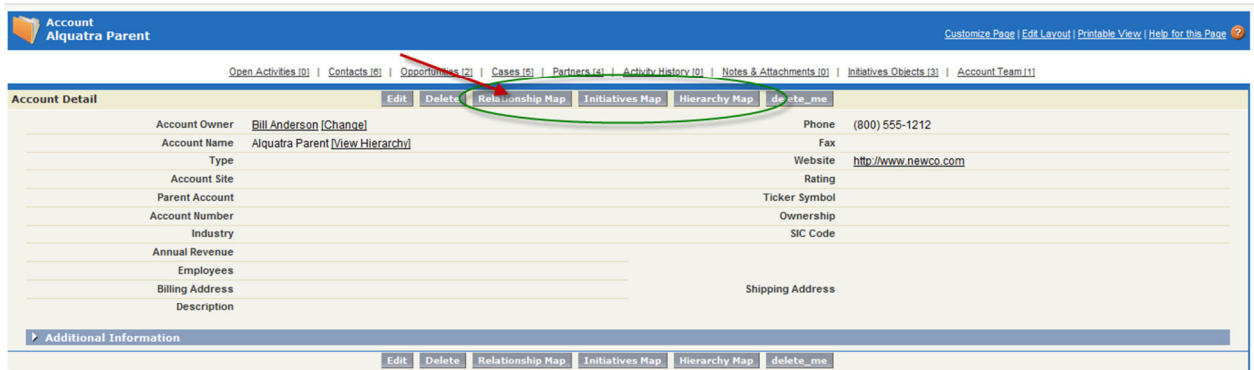
Show Status Bar: ☐

Created By: Tim Barnes, 1/5/2011 6:56 AM

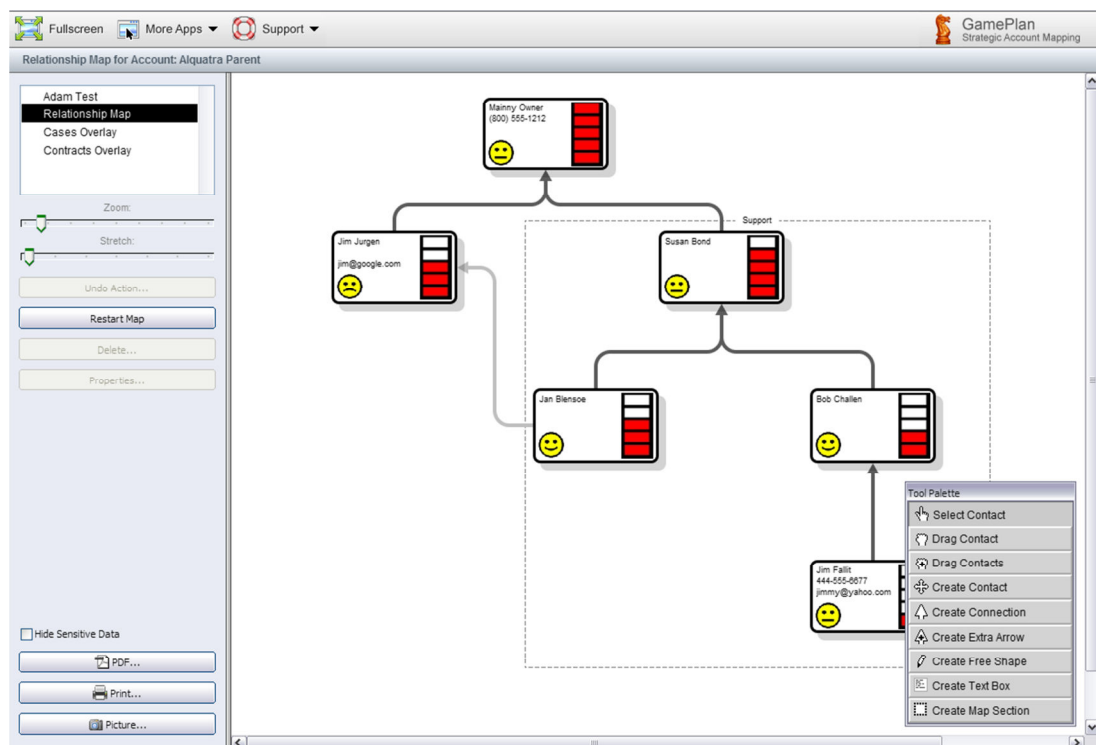
Modified By: Tim Barnes, 1/10/2011 11:40 AM

- Then place the button on the page layout. Then you have created a link to that particular map that will launch from within the context of the selected entity be it an Account, Opportunity, Case, etc...

7. So when you are ready to launch the map, at Runtime, you go to the Account and then click on one of the buttons that you created to launch the map.



8. For example, if you click on the Relationship Map button, it will launch the runtime for that Account with the ID for the account and linked to the relationship at setup.
9. When the runtime side appears, you will see the Relationship Map on your screen.



Product Support

For additional product support, please refer to one of the following support options:

Live Chat – You can initiate a Live Chat with one of our Success Engineers by simply clicking on the Support Menu and selecting the Live Chat option.

Phone Support – You can contact our Support Engineers by phone at 1-877-577-3453 or by selecting the Phone Support option from the Support Menu.

Email Support – You can also email DreamFactory Support at support@dreamfactory.com.

Support Wiki – You can access additional information by accessing the DreamFactory Support Wiki online at <https://dreamfactory.pbworks.com/DreamTeam-Suite>.

DreamFactory Support is available 5:00 AM until 5:00 PM PST (8:00 AM – 8:00PM EST) M-F.