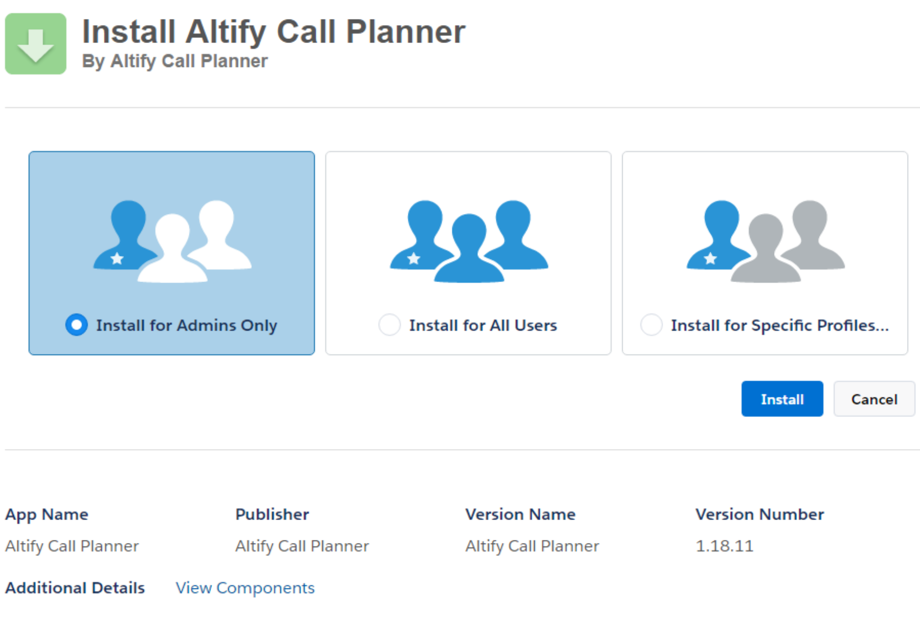
9.9 Installing Call Planner

Contents

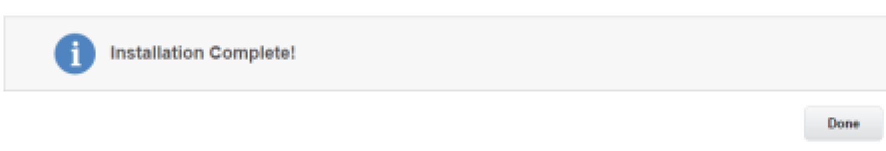
Install the Call Planner Package

1. Open the Call Planner package installation URL in your browser. This is provided by your Altify engagement manager.
2. Log into Salesforce.com with your administration username and password.
3. The Install window opens. Select **Install for Admins Only**.

   IMPORTANT: Do not select either of the other options. This could corrupt user profiles. (These settings are not needed because access to Call Planner is controlled through licensing and permission set allocation.)
4. Click **Install**.



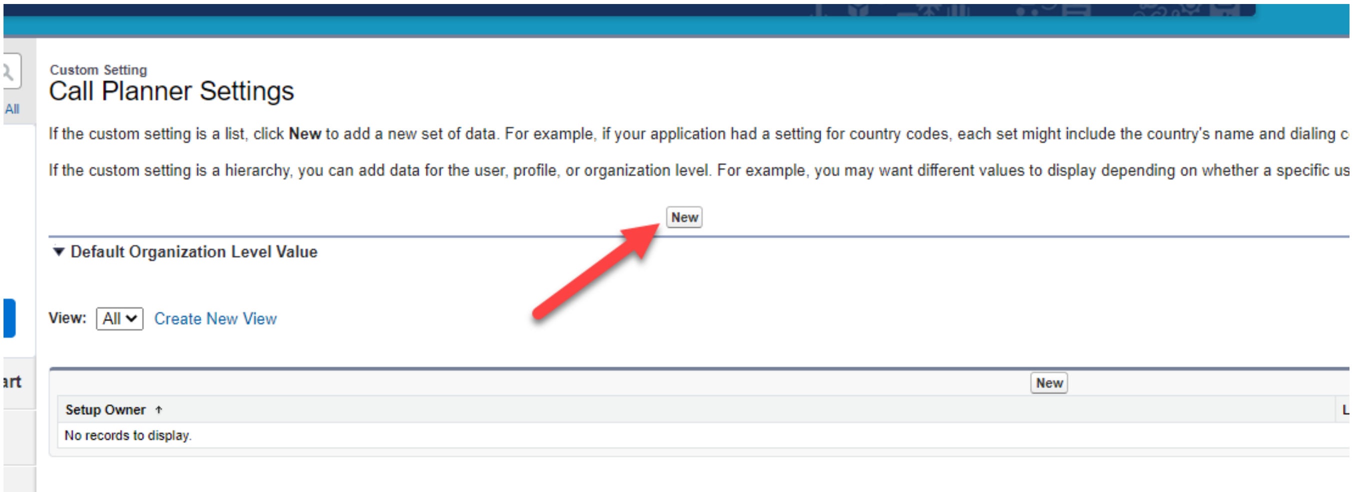
5. After a short interval, a screen appears confirming that the package has been installed. Click **Done**. When the installation is complete, you will receive a confirmation email from support@salesforce.com.



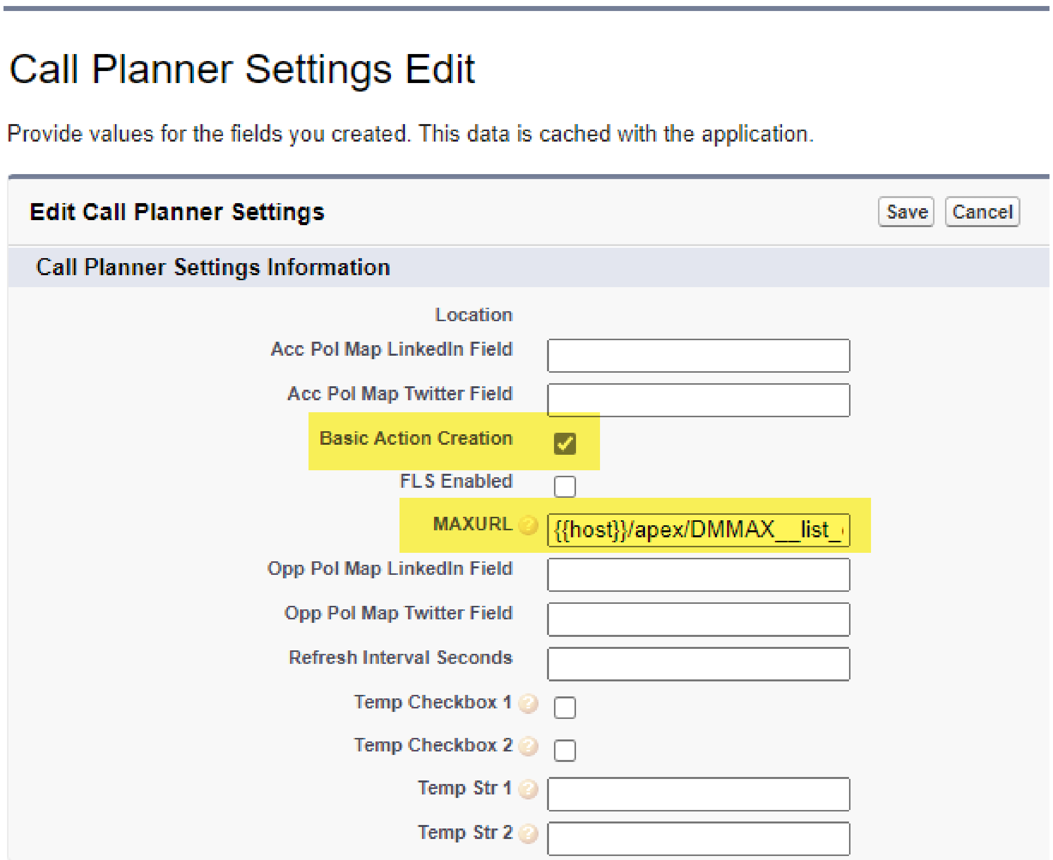
Verifying the Call Planner Install

To verify the install and to avoid DML errors, do the following:

1. Go to **Custom Settings**.
2. Click **Manage** next to Call Planner Settings.
3. Click the **New** button. There are two on the page, select the upper one as shown below.



The Call Planner Settings are created and displayed. See how two settings (Basic Action Creation and MAXURL) are automatically populated with default values. For more information on these settings, see "Call Planner Custom Settings" on page 11.



4. Click **Save**.

   You can now check that you have the required Permission Set by proceeding with step 5.

5. Go to **Call Plans** on the All Tabs screen.

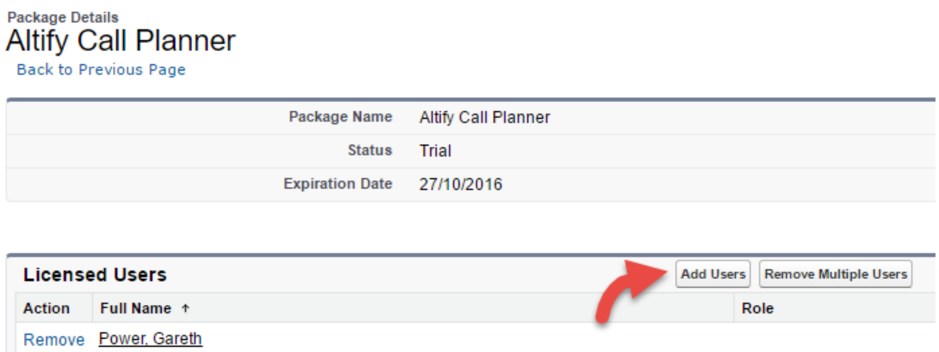
   Verify the success of your installation by creating and viewing plans on the Call Plans screen. For help with creating a Call Plan, see the *Call Planner Quick Start Guide*.

Allocate Call Planner Licenses

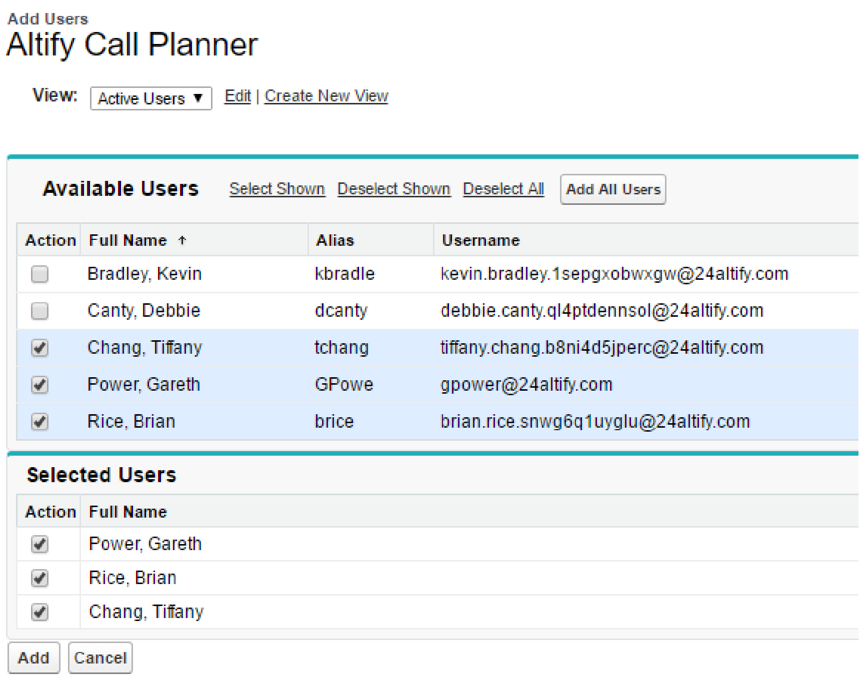
Having installed the Call Planner package, you are taken to the Installed Packages page.

1. Click the Call Planner **Manage Licenses** link.

2. The users currently licensed for Call Planner are listed. Click **Add Users** to assign additional users.



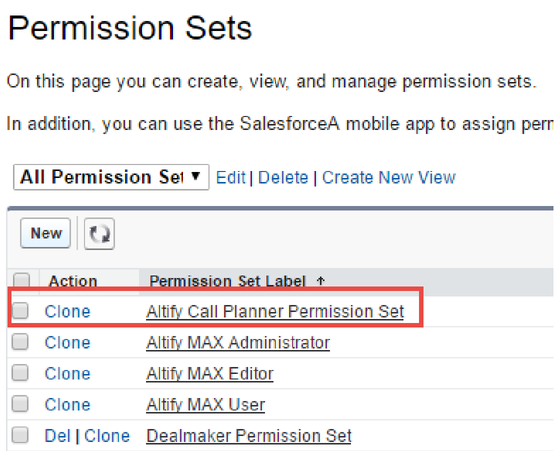
3. Select the additional users you want to license, and then click **Add**.



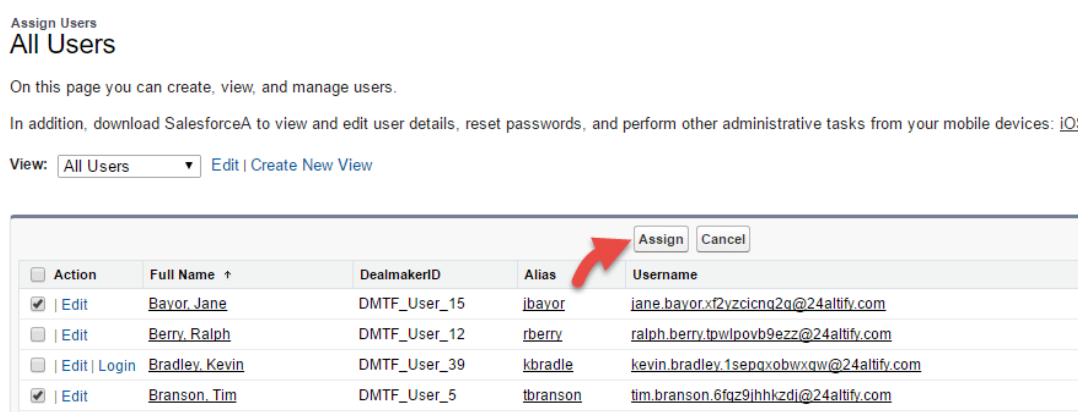
Assign the Call Planner Permission Set

To grant them the necessary level of access, you need to assign the Call Planner permission set to all users who are licensed for Call Planner.

1. In **Setup**, go to **Permission Sets**.
2. Click Altify Call Planner Permission Set.



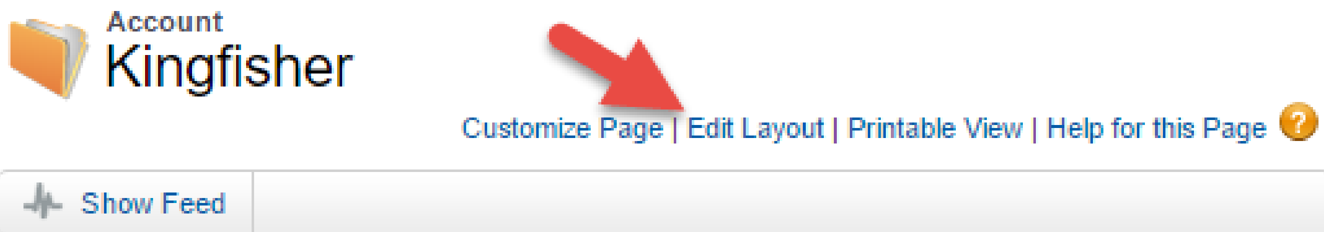
3. Click **Manage Assignments**.
4. In the Assigned Users page, you can see who is currently assigned the permission set. To add further users, click **Add Assignments**.
5. Select the users to whom you want to assign the permission set, and click **Assign**.



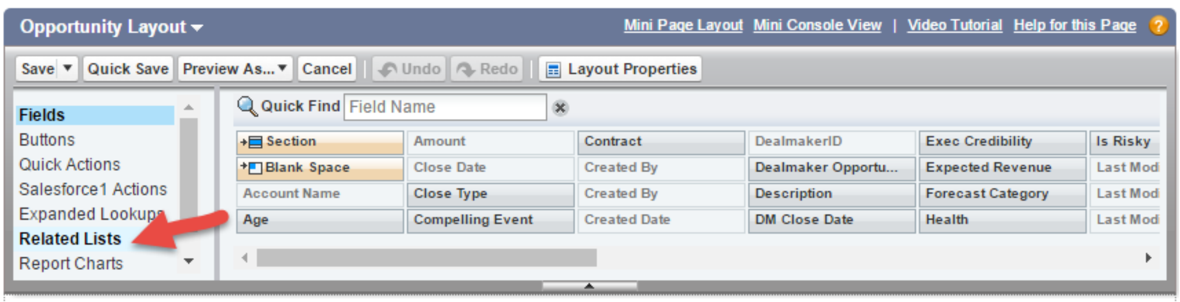
Adding the Call Plans Related List

You need to add the Call Plans related list to the Opportunity and Account page layouts.

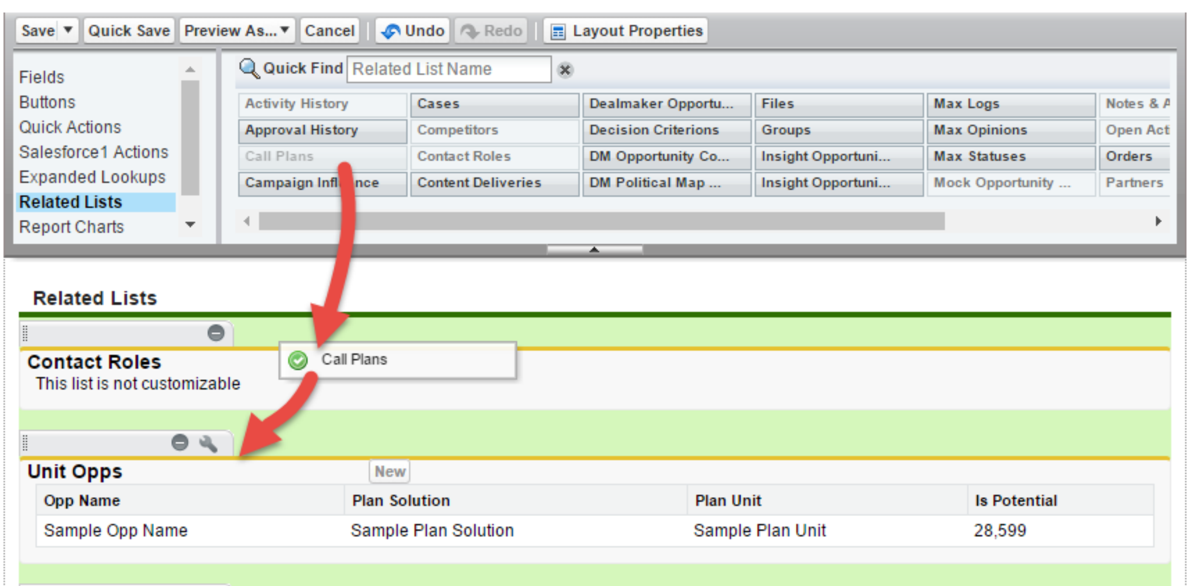
1. Open an opportunity record.
2. Click **Edit Layout** in the top right.



3. The Opportunity page layout opens. Select **Related Lists**.



4. Drag the Call Plans related list to a suitable location in the layout.



5. Click **Save**.
6. Open an Account record, and repeat this process to add the related list to the Account page layout.

Enabling Basic Action Creation

If you have customized task (action) creation in your org with extra validation or other changes, this may affect users' ability to create tasks from Call Planner. If so, you need to make a custom settings change.

1. Check whether a task can be created in Salesforce with only the following fields populated:
    - Subject
    - Assigned To
    - Due Date
    - Priority
    - Status

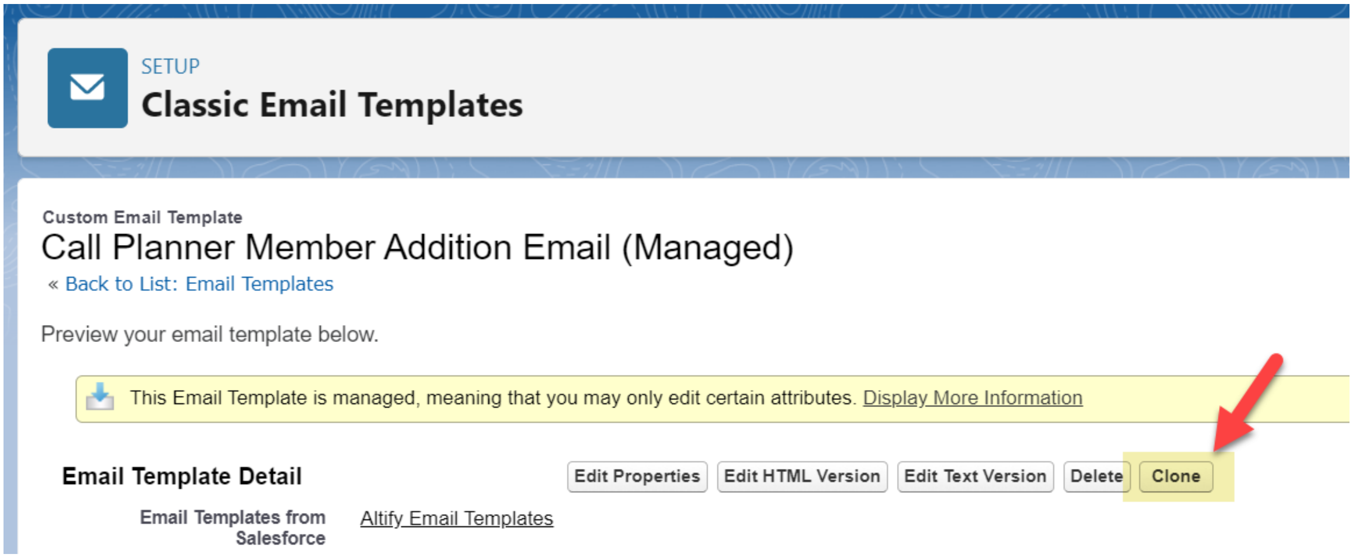
    If this is not possible, task creation will be affected in Call Planner, so you need to make the necessary custom settings change:
2. In **Setup**, go to **Custom Settings**.
3. Click **Manage** beside **Call Planner Settings**.
4. Click **Edit**.
5. Select the **Basic Action Creation** checkbox.
6. Click **Save**.

Editing the Call Planner Email

A notification email is automatically sent to call plan attendees. If you want to make changes to this default email, we recommend that you take the following steps rather than editing the email template directly. This is because changes you make to the default email would be overwritten in the event of an upgrade.

To change the Call Planner email, do the following:

1. In **Setup**, go to **Classic Email Templates**.
2. Click the template name 'Call Planner Member Addition Email' (you may need to switch the **Folder** to 'Altify Email Templates' to see this template).
3. Click the **Clone** button on the template record (as shown below).



4. On the New Template page, do the following:
   a. Change the **Folder** value to 'Unfiled Public Classic Email Templates'.
   b. Enter a new **Email Template Name** so that the new template can be easily distinguished from the original template.
   c. Enter a new **Template Unique Name** for your cloned template.
   d. Click **Save**.
5. On the Custom Email Template page for your new template, click the button **Edit HTML version** (or **Edit Text Version** for recipients who cannot view HTML emails).
6. On the Custom Email Template Edit page, make your changes to the template and click **Save**.

   Next, you need to clone the email alert that triggers the delivery of the Call Planner email.
7. In **Setup**, go to **Email Alerts**.
8. Click the Description 'Call Planner Member Addition Email'.
9. Click the **Clone** button on the alert record.
10. On the Email Alert Edit page, do the following:
    a. Enter a new **Description** so that the new alert can be easily distinguished from the original alert.
    b. Enter a new **Unique Name** for your cloned alert.
    c. In the **Email Template** field, select the template you created in steps 1-6.
    d. Click **Save**.

    Next, you need to clone the workflow that handles the Call Planner email.
11. In **Setup**, go to **Workflow Rules**.

12. Click the Rule Name 'Altify Call Planner - Team Member Addition'.
13. Click the **Deactivate** button.
14. Click the **Clone** button.
15. In the Edit Rule section (Step 2), enter a new **Rule Name** so that the new workflow can be easily distinguished from the original workflow.
16. Click **Save & Next**.
17. In the Immediate Workflow Actions section (Step 3), click **Add Workflow Action** and **Select Existing Action** in the drop-down menu that is displayed.
18. On the Select Existing Actions page, **Add** the alert that you created in steps 7-10 to the Selected Actions.
19. Click **Save**.
20. On returning to Step 3, click **Done**.
21. Finally, click **Activate** on returning to your new Workflow Rule record.

    To verify your new Call Planner email, simply add a user (whose email you can view) as a Call Plan attendee.

Testing Call Planner Email

In sandbox orgs, email deliverability is set to **System Email Only** by default. This prevents Call Planner emails from being generated.

So if you want to test Call Planner's email functionality in a sandbox org, you need to change the deliverability setting:

1. In **Setup**, go to **Deliverability**.
2. Set the Access Level to **All Email**.
3. Click **Save**.

You can now test email functionality in Call Planner.

Note: This task is not necessary in production orgs, which are set to **All Email** by default.

Call Planner Custom Settings

Custom Setting	Description
Basic Action Creation	This checkbox needs to be selected when task (action) creation in your org has extra validation or other customizations that prevent task creation using only the following standard fields: • Subject • Priority • Status • Due Date • Owner For more information, see "Enabling Basic Action Creation" on page 7.
FLS Enabled	When this checkbox is selected, Field-Level Security is enabled.
MAXURL	This is the URL where Altify MAX insights are located.