



# MCA Application Post Installation Configuration Guide

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**Document History**

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## **1 Introduction**

- MCA Application Configuration Guide is designed to provide the steps that need to be configured after installation of the MCA Application. It also provides the pre-requisites required for the MCA application configuration.
- This manual can help you to fix the required post installation configuration settings for MCA application to achieve the effective and efficient performance of the MCA application.

## 2 Prerequisites

Sr. No.	Item	Description
1	MCA Installation	Install the MCA application using the provided URL.
2	Conga Installation	Install the Conga Composer from AppExchange.
3	Lead Scoring Rule	Install the Lead Scoring Rule application from AppExchange.

### 3 Lead Mappings

- Map the fields on Lead as given in *Table 1*.

**Table 1 – Lead Mapping Fields**

Sr. No.	Lead Fields	Fields to Map	Object
1	Average Monthly CC Sale	Monthly CC Avg	Account
2	Convert	ConvertedAccount	Account
3	Credit Score	Credit Score	Opportunity
4	Desired Amount	Amount Requested	Opportunity
5	ISO	ISO	Opportunity
6	ISO Sales Rep	ISO Sales Rep	Opportunity
7	Lead Created Date (Copy for Mapping)	Lead Created Date	Opportunity
8	Monthly Gross Sales	Gross Monthly Sales	Account
9	Set Opportunity Status	Set Opportunity Status	Opportunity
10	Total Lead Score	Lead Score at Conversion	Opportunity
11	Years in Business	Years In Business	Account

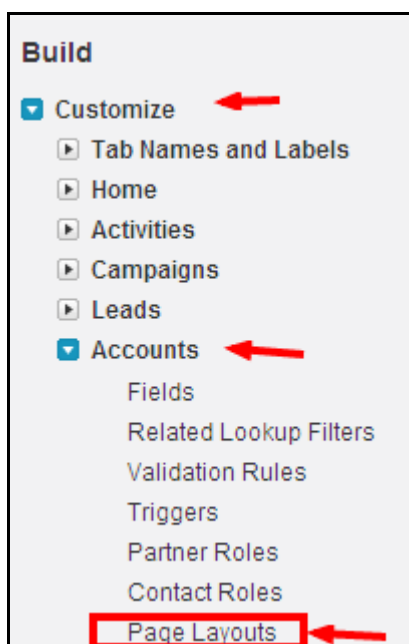
## 4 Page Layout Assignments

- Page Layout need to configure.

**Table 2 – Object Page Layout**

Sr. No.	Page Layout	Object	Description
1	Merchant	Account	Assign <b>Merchant</b> Page Layout as a Master Page Layout for the Account object.
2	Lead Layout	Lead	Default Lead Page Layout from MCA package will be act as Master Page Layout for the Lead object.
3	Opportunity Layout	Opportunity	Default Opportunity Page Layout from MCA package will be act as Master Page Layout for the Opportunity object.
4	Contact Layout	Contact	Default Contact Page Layout from MCA package will be act as Master Page Layout for the Contact object.
5	Contract Layout	Contract	Default Contract Page Layout from MCA package will be act as Master Page Layout for the Contract object.

- By default managed package page layout are not assigned to all objects, therefore manually we have to assign packaged page layouts by going through below mentioned steps:-
  - 1 To assign **Page Layout** to the Opportunity, Contact, Account, Contract, Lead objects
    - 1.1 Click on the **Setup** menu.
    - 1.2 Click on **Customize > Object name > Page Layouts**.



**Figure 1 – Customize Page Layouts**

- 1.3 Click on the **Page Layout Assignment** tab > Edit Assignment.
- 1.4 Click on the Profile, to select the profile on which you need to assign the packaged page layout. If you want to select multiple profile simultaneously, you need to press ctrl +click on that profile. After selection the profile it will display

as shown in the *Figure 2*.

Profiles	Master	Bank	ISO	Merchant
Contract Only User	Merchant	Bank	ISO	Merchant
Contract Manager	Merchant	Bank	ISO	Merchant
Custom: Marketing Profile	Merchant	Bank	ISO	Merchant
Custom: Sales Profile	Merchant	Bank	ISO	Merchant
Custom: Support Profile	Merchant	Bank	ISO	Merchant
Customer Community Login User	Merchant	Bank	ISO	Merchant
Customer Community User	Merchant	Bank	ISO	Merchant
Customer Portal Manager	Merchant	Bank	ISO	Merchant
Customer Portal Manager Custom	Merchant	Bank	ISO	Merchant
Customer Portal Manager Standard	Merchant	Bank	ISO	Merchant
Customer Portal User	Merchant	Bank	ISO	Merchant
Force.com - One App User	Merchant	Bank	ISO	Merchant
Gold Partner User	Merchant	Bank	ISO	Merchant
High Volume Customer Portal User	Merchant	Bank	ISO	Merchant
HighVolumePortal	Merchant	Bank	ISO	Merchant
Marketing User	Merchant	Bank	ISO	Merchant
Partner Community Login User	Merchant	Bank	ISO	Merchant
Partner Community User	Merchant	Bank	ISO	Merchant
Read Only	Merchant	Bank	ISO	Merchant
Solution Manager	Merchant	Bank	ISO	Merchant
Standard Platform User	Merchant	Bank	ISO	Merchant
Standard User	Merchant	Bank	ISO	Merchant
System Administrator	Account Layout	Bank	ISO	Merchant

**Figure 2 – Page Layout Edit Assignment for Standard Object**

- 1.5 Click on **Save** after assigning the profiles and perform a quick round of testing by navigating through **Object** tab > Click on any record > check the Layout.
  
- 2 For all other Objects:
  - 2.1 Click on **Create** > **Object** > select the object for which Page Layout need to assign.
  - 2.2 Go to the **Page Layout** section and click on **Page Layout Assignment** tab as shown in *Figure 3*.
  - 2.3 Follow the steps as described on 1.3 and 1.4.

Page Layouts				
		New	Page Layout Assignment	Page Layouts Help ?
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit   Del	Offer Layout	Henry Abenaim, 3/5/2014 5:16 AM	Henry Abenaim, 5/12/2014 6:08 AM	<input type="checkbox"/>

**Figure 3 – Page Layout Edit Assignment for Custom Object**



## 5 Lead Rating Formula on Lead

- If the “Lead Scoring App” is installed in your org, then only this step is required, otherwise skip this step.
- To create a lead rating field, go to below mentioned steps
  - 1) Go to **Setup > Customize > Lead > Fields > New**.
  - 2) Select the Data Type **Formula** and click Next.

The screenshot shows the 'New Custom Field' wizard for a 'Lead' object. The title is 'New Custom Field' with a 'Help for this Page' link. The current step is 'Step 1. Choose the field type'. At the top right, there are 'Next' and 'Cancel' buttons, with a red arrow pointing to the 'Next' button. Below the step indicator, it says 'Specify the type of information that the custom field will contain.' Under the 'Data Type' section, there are four options: 'None Selected', 'Auto Number', 'Formula', and 'Roll-Up Summary'. The 'Formula' option is selected and highlighted with a red box. A red arrow also points to the 'Formula' option. Each option has a brief description: 'None Selected' (Select one of the data types below.), 'Auto Number' (A system-generated sequence number...), 'Formula' (A read-only field that derives its value from a formula expression...), and 'Roll-Up Summary' (A read-only field that displays the sum, minimum, or maximum value...).

Figure 4 – Field Type Selection Wizard

The screenshot shows the 'New Custom Field' wizard, Step 2: Choose output type. The title is 'Step 2. Choose output type' with 'Step 2 of 5' in the top right. At the top right, there are 'Previous', 'Next', and 'Cancel' buttons. Below the step indicator, there are two input fields: 'Field Label' with the value 'Lead Score Rating' and 'Field Name' with the value 'Lead\_Score\_Rating'. A red box highlights the 'Field Label' input. Below these fields is the 'Formula Return Type' section with several options: 'None Selected', 'Checkbox', 'Currency', 'Date', 'Date/Time', 'Number', 'Percent', and 'Text'. The 'Text' option is selected and highlighted with a red box. A red arrow points to the 'Text' option. Each option has a brief description and an example formula: 'None Selected' (Select one of the data types below.), 'Checkbox' (Calculate a boolean value. Example: TODAY() > CloseDate), 'Currency' (Calculate a dollar or other currency amount... Example: Gross Margin = Amount - Cost\_\_c), 'Date' (Calculate a date... Example: Reminder Date = CloseDate - 7), 'Date/Time' (Calculate a date/time... Example: Next = NOW() + 1), 'Number' (Calculate a numeric value. Example: Fahrenheit = 1.8 \* Celsius\_\_c + 32), 'Percent' (Calculate a percent... Example: Discount = (Amount - Discounted\_Amount\_\_c) / Amount), and 'Text' (Create a text string... Example: Full Name = LastName & ", " & FirstName).

Figure 5 – Field Output Type Selection Wizard

- 3) Type the Field Label as “Lead Score Rating” and select Formula Return Type as “Text”.
- 4) Click Next and write the below logic inside the **Formula Editor** as shown in Figure 6.

Lead Custom Field  
**Lead Score Rating**  
[Back to Lead Fields](#)


**Custom Field Definition Detail**

**Field Information**

Field Label	Lead Score Rating	Object Name	<u>Lead</u>
Field Name	Lead_Score_Rating		
API Name	Lead_Score_Rating__c		
Description			
Help Text			
Created By	<u>Henry Abenaim</u> , 3/18/2014 2:35 AM	Modified By	<u>Henry Abenaim</u> , 4/3/2014 4:54 AM

**Formula Options**

Data Type	Formula
	IF(leadScoring__Total_Lead_Score__c < 5, IMAGE("/resource/DollarSymbolForLeadScore/Images/Dollar1.jpg", "rating 1", 20, 25), IF(leadScoring__Total_Lead_Score__c < 10, IMAGE("/resource/DollarSymbolForLeadScore/Images/Dollar2.jpg", "Rating 2", 20, 50), IF(leadScoring__Total_Lead_Score__c < 15, IMAGE("/resource/DollarSymbolForLeadScore/Images/Dollar3.jpg", "Rating 3", 20, 75), IF(leadScoring__Total_Lead_Score__c < 20, IMAGE("/resource/DollarSymbolForLeadScore/Images/Dollar4.jpg", "Rating 4", 20, 100), IMAGE("/resource/DollarSymbolForLeadScore/Images/Dollar5.jpg", "Rating 5", 20, 125))))))



**Figure 6 – Formula Editor**

5) Click **Next > Next > Save**.

## 6 Opportunity Contact Role

- Create Business owner role and mark it as **“Default”**.
  - 1) Click on **Setup > Customize > Opportunity > Contact Roles > New**.
  - 2) Create a new role as **“Business Owner”** and mark it as **“Default”**.

Picklist Edit  
Opportunity Contact Role

Below is the master list of picklist values for the Opportunity Contact Role field.  
Click Edit to change the name of the value or make it the default value. Click New to add a value to the picklist. Click Reorder to change the sequence of values in the list.

Action	Values	Default	Chart Colors	Modified By
Edit   Del	Business User	<input type="checkbox"/>	Assigned dynamically	MCA.Development.org, 5/12/2014 4:00 AM
Edit   Del	Decision Maker	<input type="checkbox"/>	Assigned dynamically	MCA.Development.org, 5/12/2014 4:00 AM
Edit   Del	Economic Buyer	<input type="checkbox"/>	Assigned dynamically	MCA.Development.org, 5/12/2014 4:00 AM
Edit   Del	Economic Decision Maker	<input type="checkbox"/>	Assigned dynamically	MCA.Development.org, 5/12/2014 4:00 AM
Edit   Del	Evaluator	<input type="checkbox"/>	Assigned dynamically	MCA.Development.org, 5/12/2014 4:00 AM
Edit   Del	Executive Sponsor	<input type="checkbox"/>	Assigned dynamically	MCA.Development.org, 5/12/2014 4:00 AM
Edit   Del	Influencer	<input type="checkbox"/>	Assigned dynamically	MCA.Development.org, 5/12/2014 4:00 AM
Edit   Del	Technical Buyer	<input type="checkbox"/>	Assigned dynamically	MCA.Development.org, 5/12/2014 4:00 AM
Edit   Del	Other	<input type="checkbox"/>	Assigned dynamically	MCA.Development.org, 5/12/2014 4:00 AM
Edit   Del	<b>Business Owner</b>	<input checked="" type="checkbox"/>	Assigned dynamically	MCA.Development.org, 6/23/2014 10:19 PM

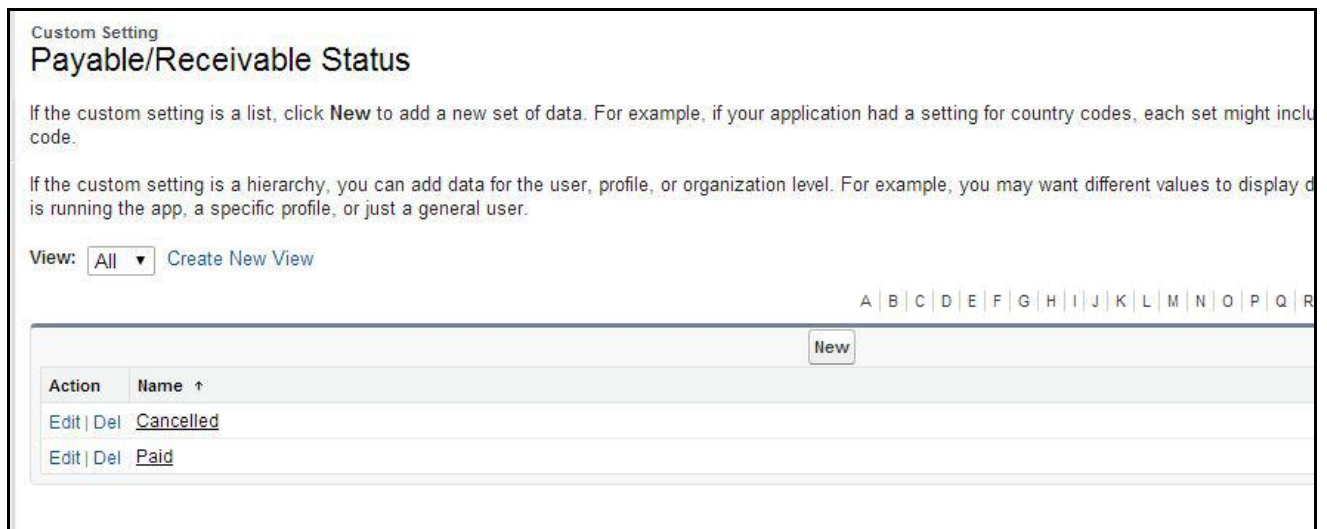
Figure 7 – Opportunity Contact Role

## 7 Custom Setting Configuration

Configure following Custom Settings:

- **Payables/ Receivables Status**

- Custom Setting Stores the Status of the Payables and Receivables (Transaction Line Items) which are not to be displayed on the Transaction while creating Line Items.
- Steps to create Custom Setting Record:
  1. Click on the **Setup** menu and then click on the **Custom Setting**.
  2. Click on the **Payables/ Receivables Status Setting**.
  3. Click on **Manage** button.
  4. Create two records as shown below with Name as:
    - 4.1. Cancelled
    - 4.2. Paid



**Figure 8 – Status of the Payable/ Receivable which are not displayed while creating Transaction**

- **Admin Accounting Setting**

- Stores the Values that are displayed on the Admin Page Accounting Section:
  - **Name** – Stores the Label that is to be displayed on the Accounting section of Admin Page.
  - **URL** – Stores Partial(only id) or complete URL of the link which opens on the click of the Link.
- Steps to create Custom Setting data:
  - 1) Click on the **Setup** menu and then click on the **Custom Setting**.
  - 2) Click on the **Manage** of Admin Accounting Setting.

## Custom Settings

[Help for this Page](#)

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Force.com Web Services API.

Percentage of custom settings data used: 0.14%  
 You are currently using 0.01 MB of custom settings data in your organization, out of an allowed limit of 10 MB.

View: All [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	<a href="#">Action Plans Settings</a>	Public	Hierarchy		Set the basic settings for My Action Plans App	120	1	120
<a href="#">Edit</a>   <a href="#">Del</a>   <b>Manage</b>	<a href="#">Admin Accounting Setting</a>	Public	List			355	6	2130
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	<a href="#">Admin Pipeline Setting</a>	Public	List			355	8	2840
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	<a href="#">Admin Report Setting</a>	Public	List			355	7	2485
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	<a href="#">Admin Setup Setting</a>	Public	List			355	8	2840

**Figure 9 – Manage on Admin Accounting Setting**

- 3) Click on **New** field.
- 4) Create record with Name and the URL of the value that is to be displayed on the Accounting column of Admin Page as shown in *Figure 11*.

## Admin Accounting Setting Edit

Provide values for the fields you created. This data is cached with the application.

**Edit Admin Accounting Setting** Save Save & New Cancel

**Admin Accounting Setting Information**

Name:  ⓘ

URL:

**Figure 10 – Create Admin Accounting Setting Record**

## Admin Accounting Setting Detail

[Back to List](#)

Edit

Name: Accounting - Receivables & Payables ⓘ URL: /01ZF0000000aPuD

**Figure 11 – Record for Admin Accounting Setting**

- Similarly create data for all the following values:

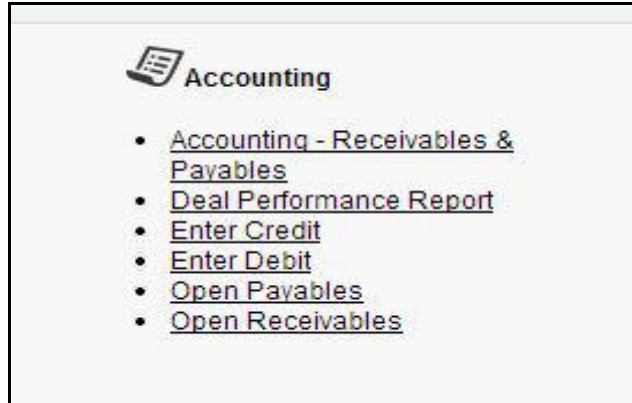


Figure 12 – Accounting Section on Admin Page

- **Admin Report Setting**

- Stores the values that are to be displayed on Report Section of Admin Page.
  - **Name** – Stores the Label that is to be displayed on the Admin Page.
  - **URL** – Stores Partial or complete URL of the link which opens on the click of the Link.
- Steps to create Custom Setting data:
  - 1) Click on the **Setup** menu and then click on the **Custom Setting**.
  - 2) Click on **Manage** of Admin Report Setting.
  - 3) Click on **New** Button.
  - 4) Create records for all the following data with Name and the URL of the value that is to be displayed on Report column of Admin Page.

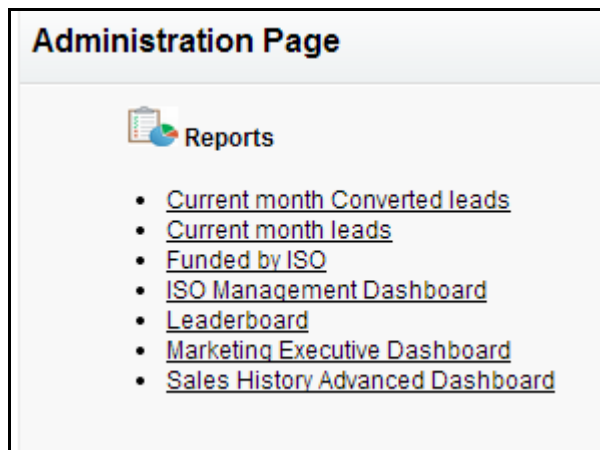


Figure 13 – Report Section of Admin Page

- **Admin Pipeline Setting**

- Similar to Admin setting populate this setting with the values that are to be displayed on Pipeline section of Admin Page.

- **Admin Setup Setting**

- Similar to Admin setting populate this setting with the values that are to be displayed on Setup section of Admin Page.

- **FundingApplicationPage\_ShowCongaButton**

- Stores if the Email PDF and Create PDF button on funding Application should be visible or not on the funding Application.
  - **Name** – Stores the Name of the Button on the Funding Application.
  - **Active** – Checkbox stores whether to display the button on the Funding Application Page (It should be Active if Conga is available in the org, else the Active checkbox should be false).
- Steps to create data:
  1. Click on the **Setup** menu and then click on the **Custom Setting**.
  2. Click on **Manage** of FundingApplicationPage\_ShowCongaButton setting.
  3. Click on **New** button.
  4. Create following Data:
    - 4.1. Create PDF
    - 4.2. Email PDF

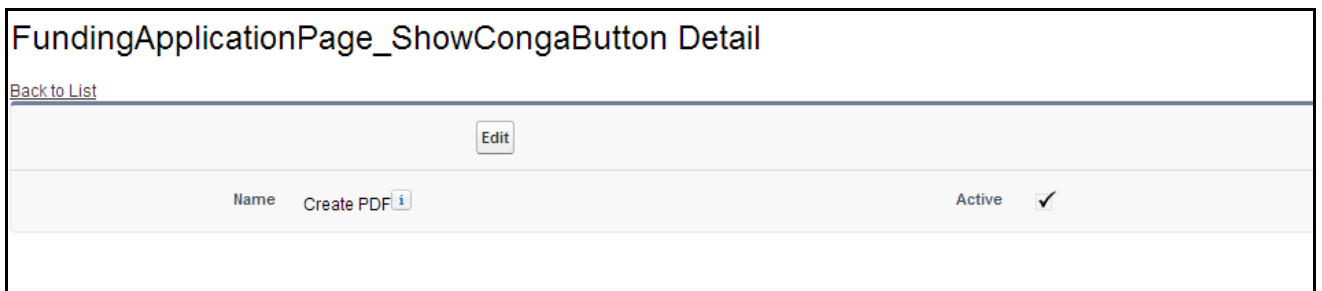


Figure 14 – Create PDF data for Custom Setting

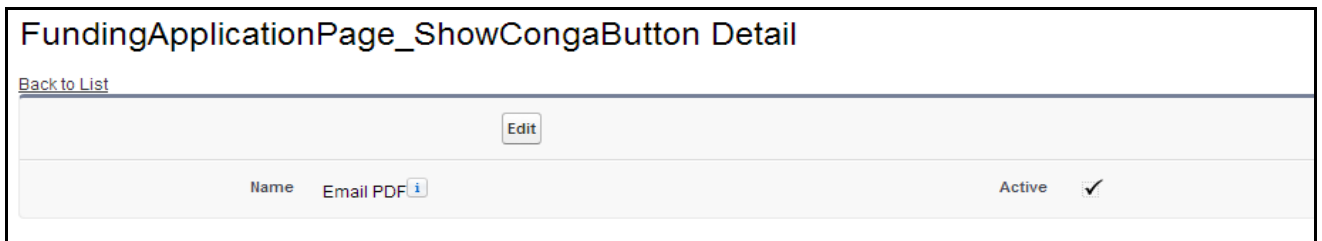


Figure 15 – Email PDF data for Custom Setting

- **Excluded Subjects**

- Add records to ExcludedSubjects custom setting by using Manage button.
- This will exclude count of Activities on Lead having subject name as mentioned in ExcludedSubjects custom setting.

Custom Setting Definition [Help for this Page](#) ?

## ExcludedSubjects

Create the fields for your custom setting. The data in these fields are cached with the application.

**Custom Setting Definition Detail** [Edit](#) [Delete](#) [Manage](#)

Label	ExcludedSubjects	Object Name	ExcludedSubjects
API Name	ExcludedSubjects__c	Setting Type	List
Visibility	Public	Description	The Custom Setting will contain the Subjects that will be excluded from increasing or decreasing Activity Count Logic on Lead Object.
Namespace Prefix		Created Date	3/5/2014 5:16 AM
Last Modified Date	3/5/2014 5:16 AM	Record Size	355

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**Custom Fields** [New](#)

Action	Field Label	API Name	Data Type	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Subject</a>	Subject__c	Text(255)	<a href="#">Henry Abenaim</a> , 3/5/2014 5:16 AM

Figure 16 – Excluded Details Custom Settings



## 8 Configure Custom Labels

- **BankListId**
  - Stores the List View Id of Bank list view on Account.
  - Steps to capture the ID:
    - 1) Click on **Accounts** Tab.
    - 2) Select **Banks** from View drop down list.

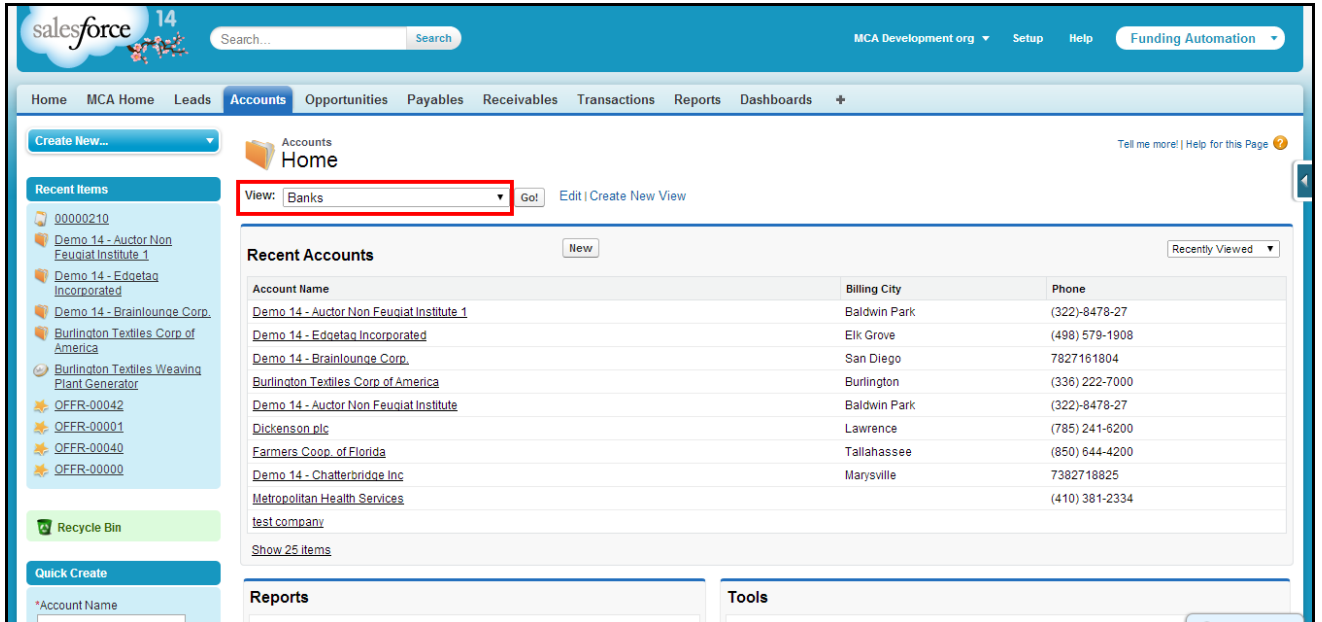


Figure 17 – Bank List View on Account

- 3) Click **Edit** button.

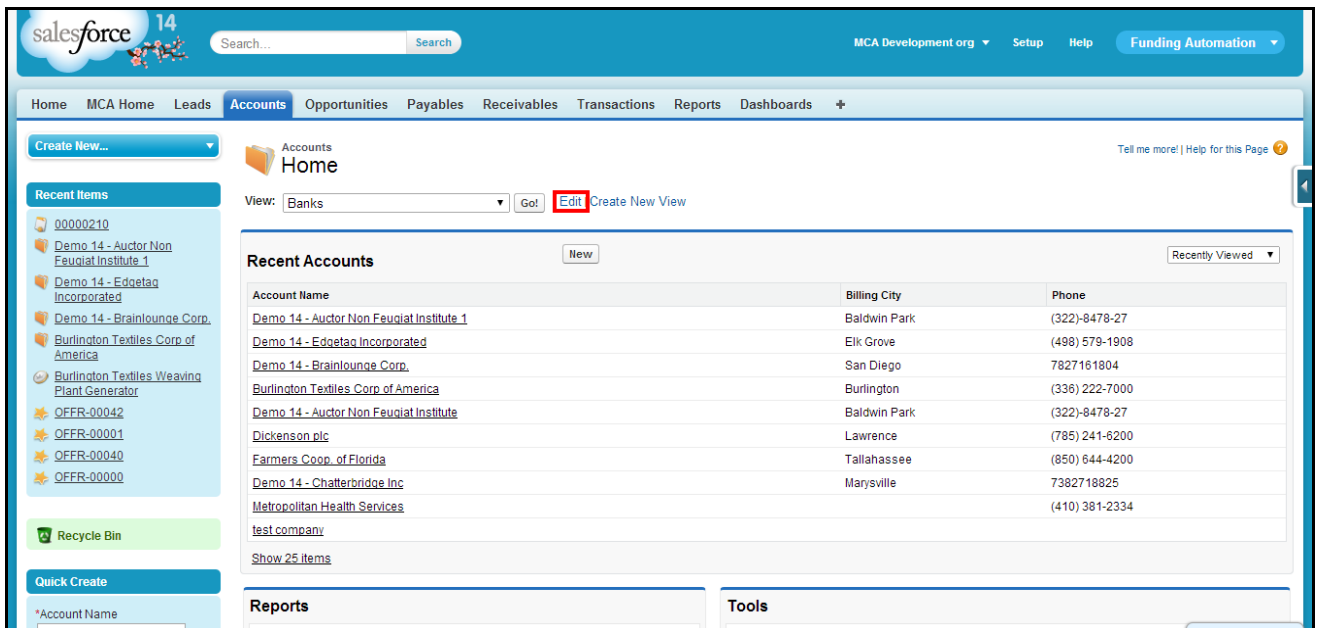


Figure 18 – Edit button on Bank List View

- 4) Copy the **ID** as shown in Figure 19.

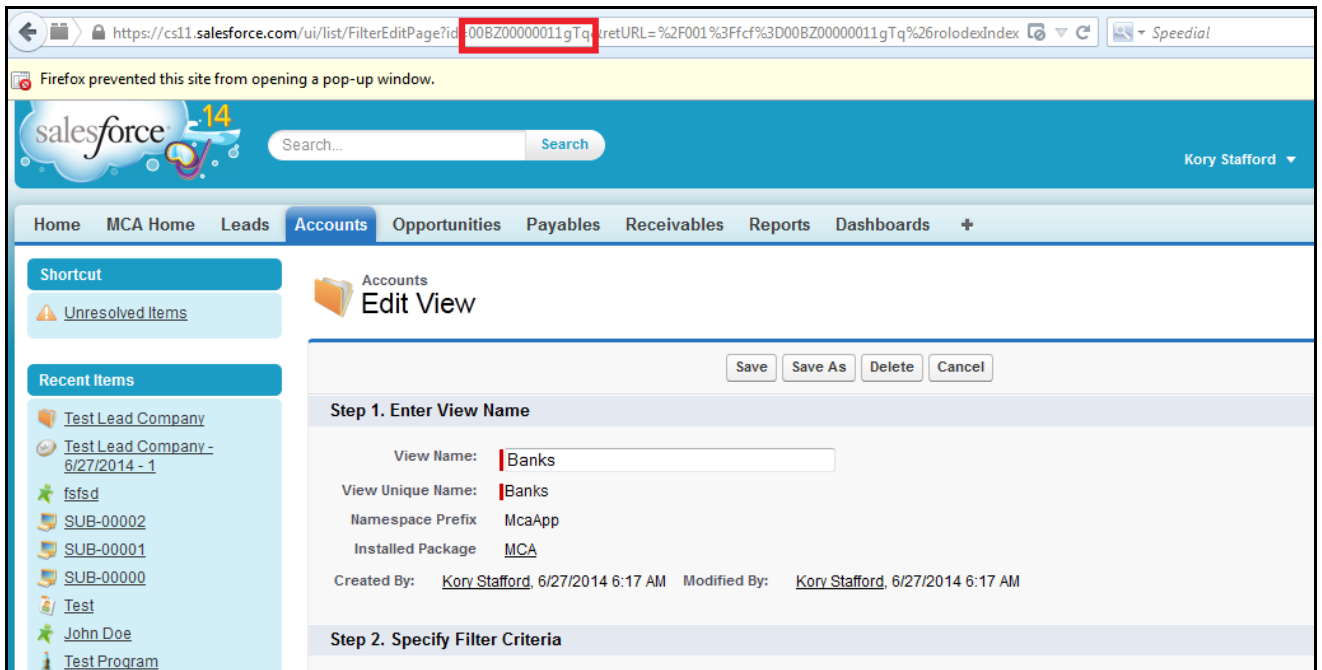


Figure 19 – Copy the ID of Bank List View

- 5) Click on the **Custom Label** and then click on **BankListId** label.
- 6) Click on **New Local Translations/ Overrides** and paste the ID as shown in *Figure 20*.

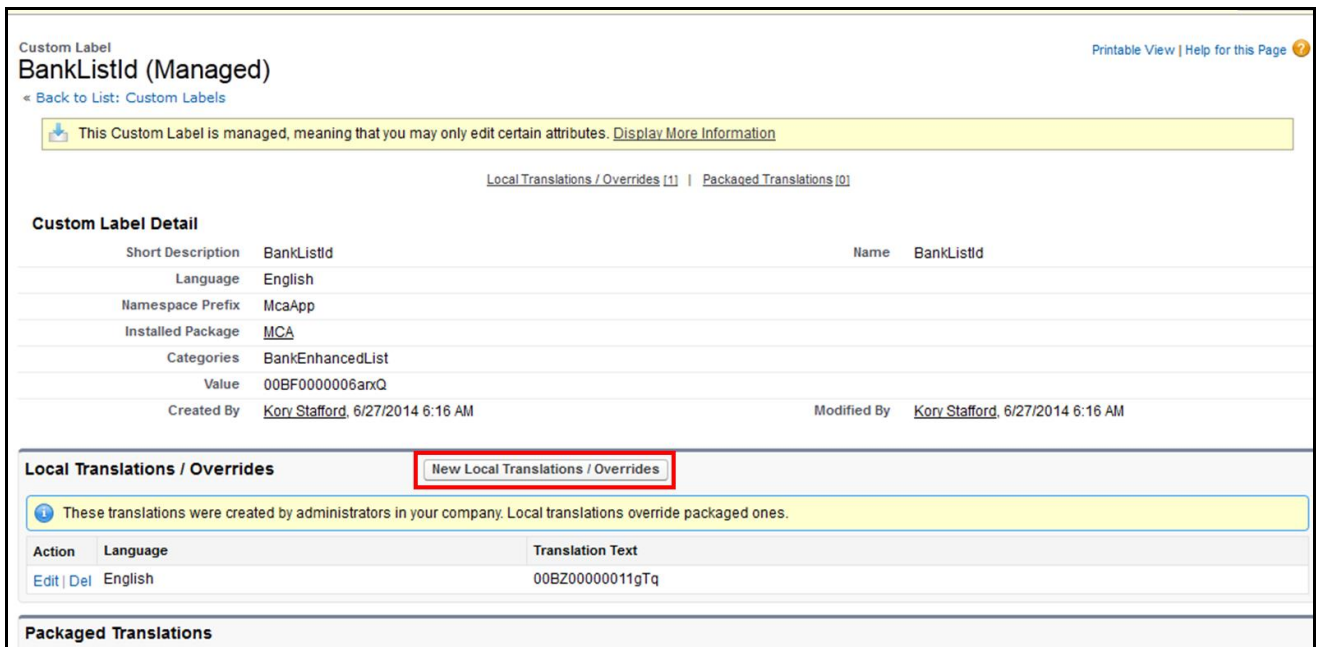


Figure 20 – BankListId Label with the New Value

- **ISOListId**
  - Stores the List View ID of ISO list view on Account Steps to capture the ID.
  - Similar to Bank List view ID, capture the ISO list view Id and store it in ISOListId Custom Label.
- **DashboardIdeas\_CampaignsUrl**
  - Stores the ID of the component that is displayed on MCA Home Campaign link. The component that is displayed is Campaign Metrics Dashboard.

- Steps to populate the Label
  - 1) Click on **Dashboards** tab.
  - 2) Go to the folder **Campaign Dashboard**.
  - 3) Click on **Campaign Metrics Dashboard**.
  - 4) Copy the ID of the dashboard.
  - 5) Go to custom Labels, open DashboardIdeas\_Campaigns URL label.
  - 6) Click on 'New Local Translations / Overrides' and paste the ID.

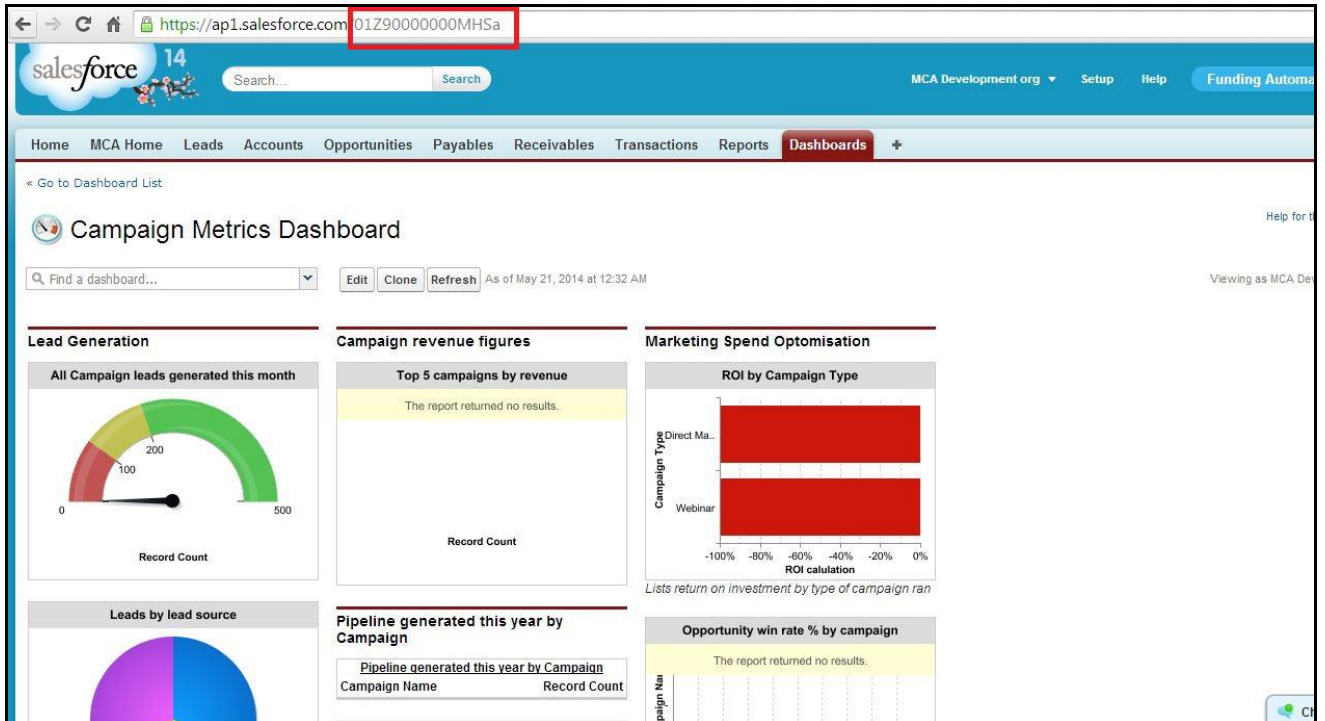


Figure 21 – ID of Campaign Metrics Dashboard

- **DashboardIdeas\_Lead**
  - Stores the Id of the component that is displayed on MCA Home Lead image link. The component that is displayed is Leads Management Dashboard.
  - Similar to the above label store the Id of Leads Management Dashboard in DashboardIdeas\_Lead label.
- **DashboardIdeas\_DealsDashboard**
  - Stores the Id of the component that is displayed on MCA Home Deals image link .The component that is displayed is Deal Management Dashboard.
  - Similar to the above label store the Id of Deal Management Dashboard in DashboardIdeas\_DealsDashboard
- **Dashbaord\_Renewal\_Path\_Url**
  - Stores the partial URL of the component that is displayed on MCA Home Renewals image link. The component that is displayed is Manage Renewal Page.

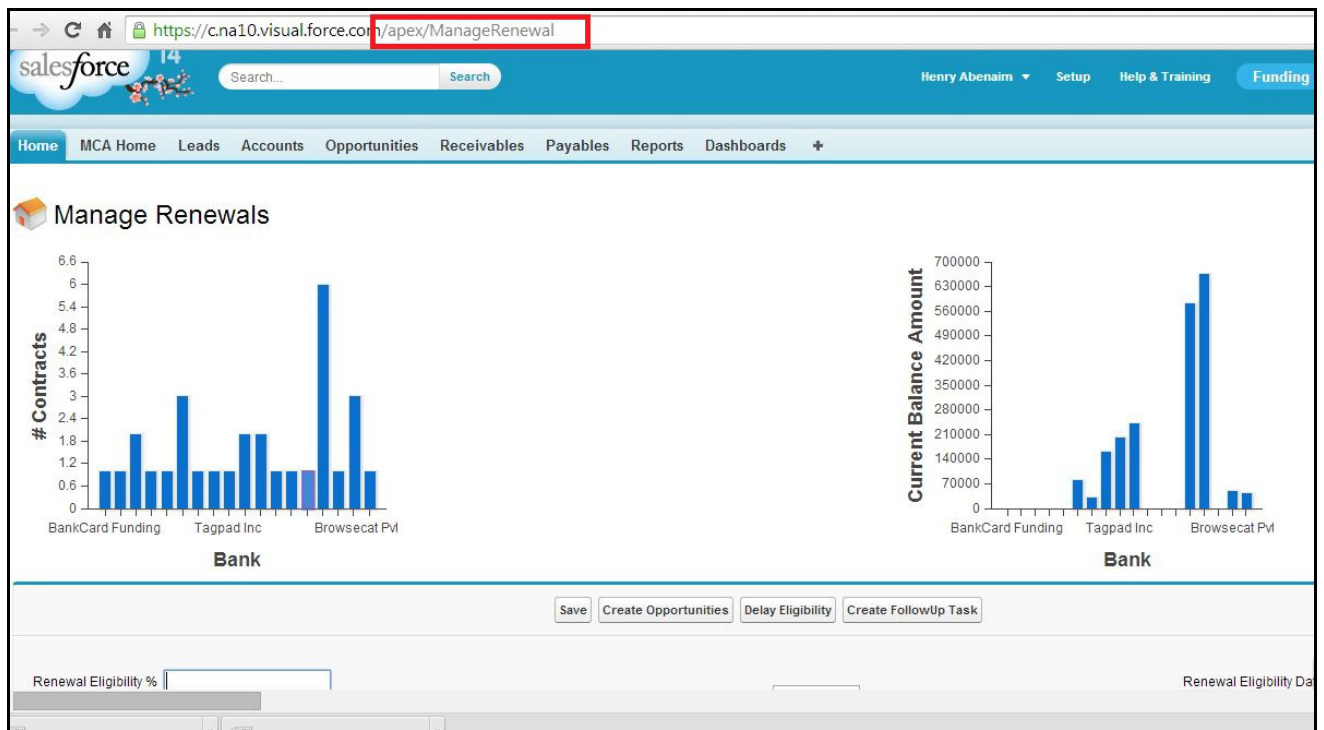


Figure 22 – Partial URL for Manage Renewal Page

- **DashbaordIdeas\_Commissions\_Path\_Url**
  - Stores the Id the component that is to be displayed on MCA Home Commissions image link. The component that is displayed is Accounting – Receivables & Payables Dashboard.
  - Store the Id of Accounting – Receivables & Payables Dashboard in the label.
  
- **DashboardIdeas\_Syndication\_Dashboard**
  - Stores the Id the component that is to be displayed on MCA Home Syndication image link. The component that is displayed is Syndication Dashboard.
  - Store the Id of Syndication Dashboard in the label.
  
- **DashbaordIdeas\_Dashboard\_Path\_Url**
  - Stores the Id the component that is to be displayed on MCA Home Dashboards image link. The component that is displayed is Company Performance Dashboard.
  - Store the Id of Company Performance Dashboard in the label.
  
- **DashboardIdeas\_MyInbox**
  - Stores the Id the component that is to be displayed on MCA Home My Inbox image link.
  - Store the URL of Activities Page if the Activities Package exist else add the home Page URL in the label.
  
- **DashboardIdeas\_Admin**
  - Stores the partial URL of the component that is displayed on MCA Home Admin image link. The component that is displayed is Admin Page.

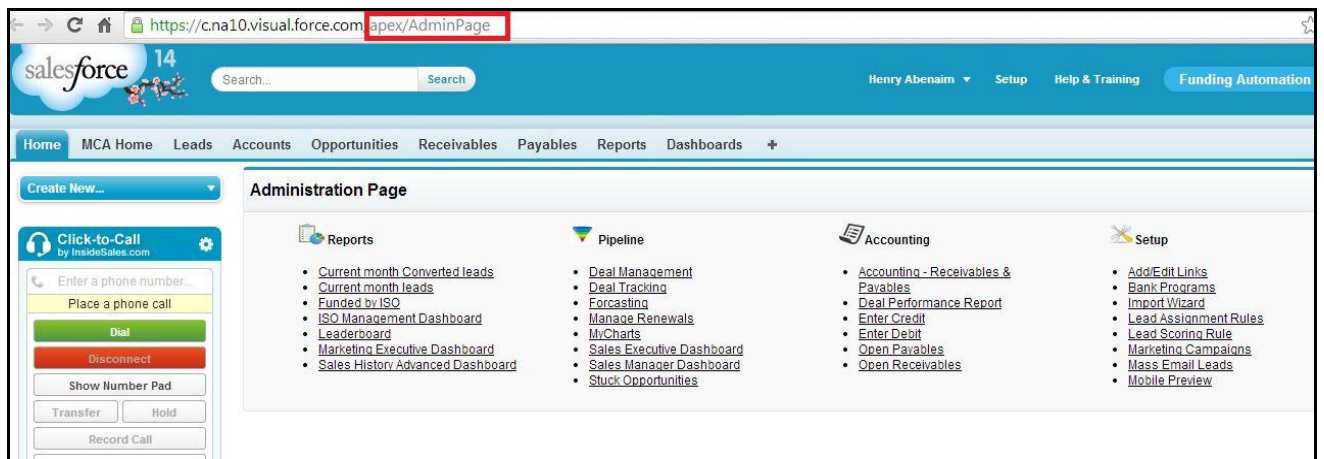


Figure 23 – Partial URL for Admin Page

- **MCA\_Home\_Task\_Activities\_Management\_Dashboard**
  - Stores the Id the component that is to be displayed on MCA Home Tasks image link. The component that is displayed is Sales activity dashboard
  - Store the Id of Sales activity dashboard in the label.
  
- **Email\_Stips\_Template\_Id**
  - Stores the Id the Email Stips Visualforce Email Template.
  - Steps:
    - 1) Go to Visualforce Email template.
    - 2) Open Email Stips template.
    - 3) Copy the ID of the template.
    - 4) Paste it to Email\_Stips\_Template\_Id label.
  
- **FundingApplicationTemplateId**
  - Add the ID of Funding Application Conga template.

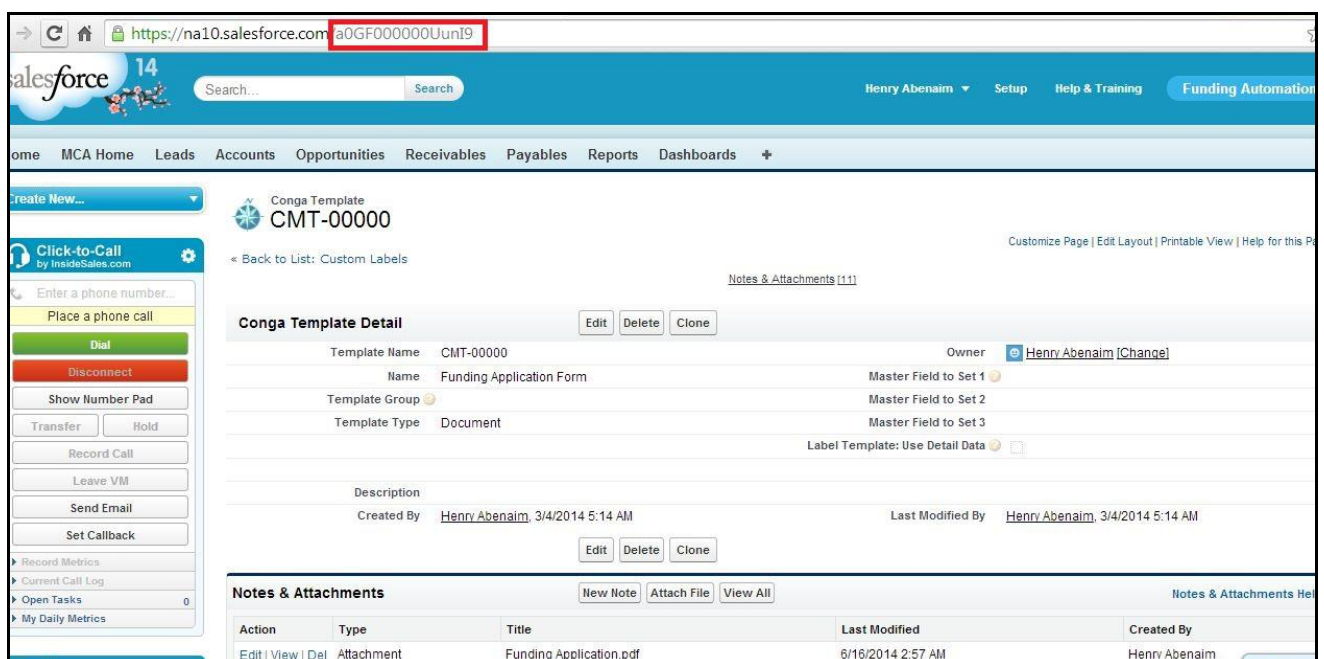


Figure 24 – Funding Application Template ID

- **CongaTemplateId**
  - Stores the Funding Application Email Template ID.

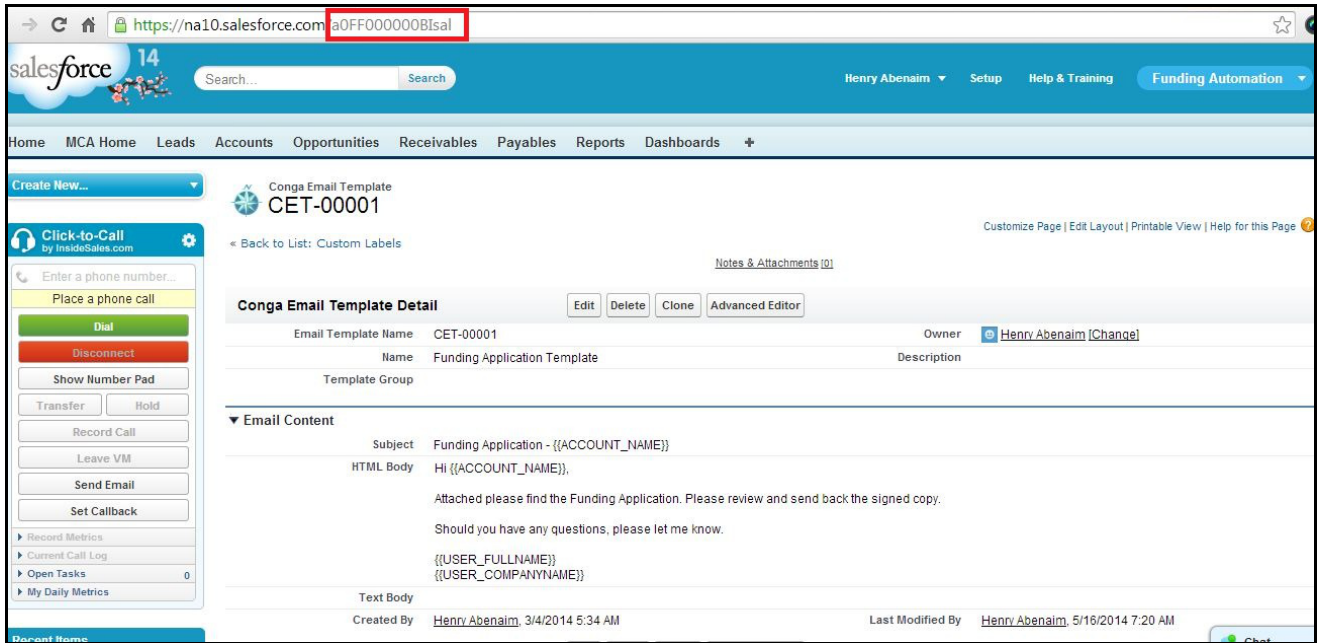


Figure 25 – Funding Application Conga Email Template ID

- **CongaQueryId\_Offer**
  - Store the ID Conga Query named Offer.

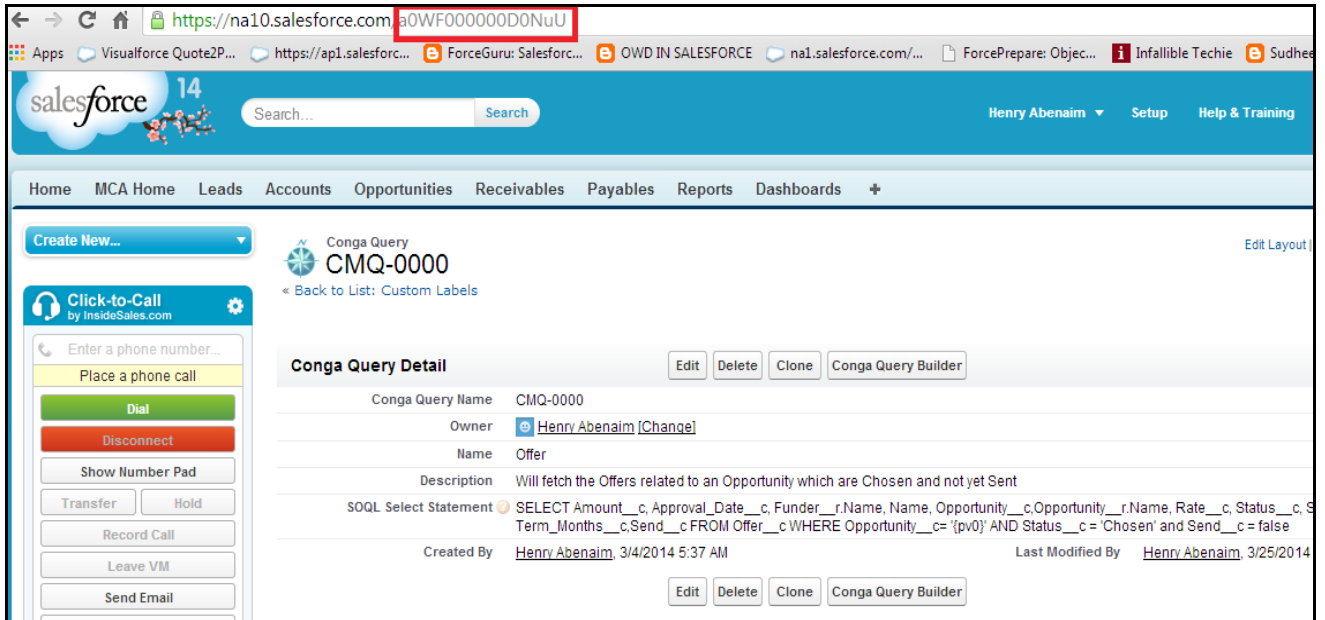


Figure 26 – Conga Query for Offer

- **CongaEmailTemplate\_Offer**
  - Stores the Id of the Conga Email Template Offer.

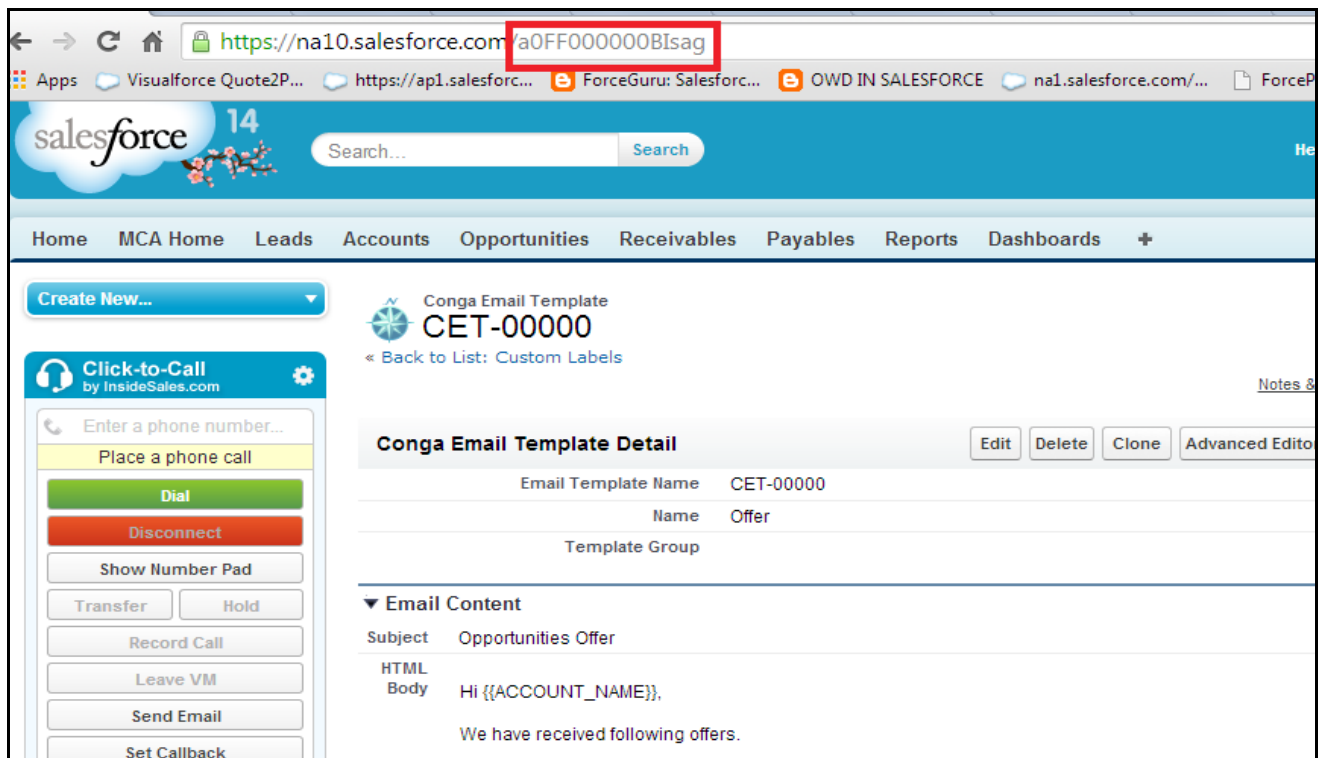


Figure 27 – Conga Email Template for Offer

- **SubmissionWizard\_LogoName(Optional) -**
  - Put the name of **Document Name**(e.g. Here in above image Document Name is specified as Submission Email Logo, which is mentioned as a value in SubmissionWizard\_LogoName value) in value of **SubmissionWizard\_LogoName** custom Label.

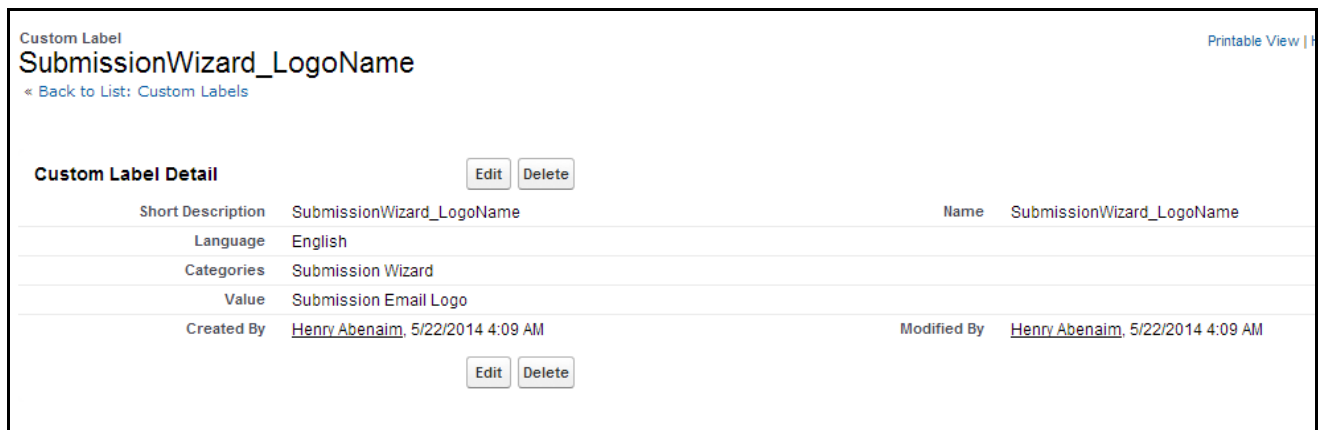


Figure 28 – Label for Submission Wizard Logo

## 9 Create record for Submission Mail Detail Object

- Click on All tabs to create record of **Submission Email Detail** object.

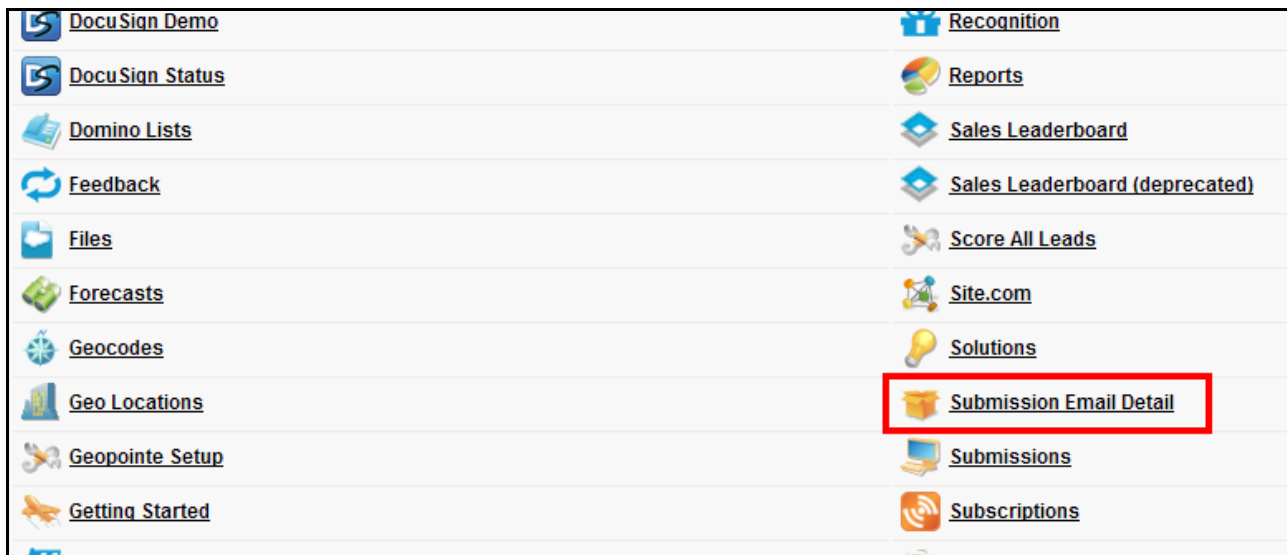


Figure 29 – Submission Email Detail Tab

- To create record of **Submission Email Detail** object, put the details as shown in *Figure 30*

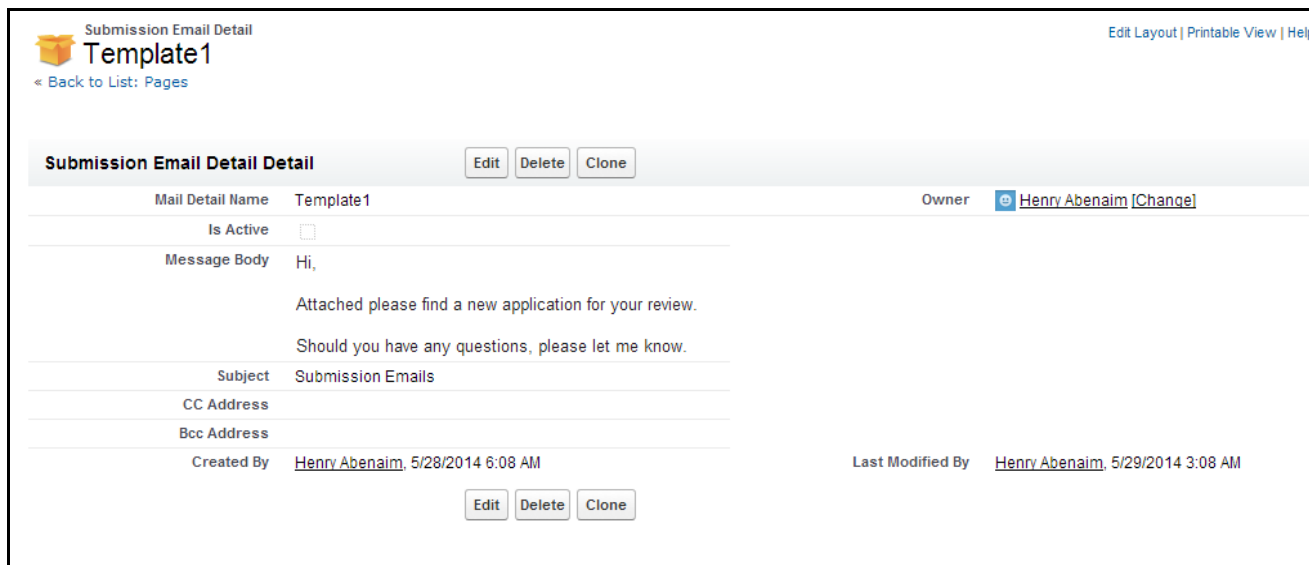


Figure 30 – Submission Email Detail Record



## 10 Create a document record (Optional) to display image in Submission Email

- Create a record of **Document** which holds the image.  
e.g. In below Image, Record of Document contains Logo Cloud My Biz, which is referred in Email send on click of **Send Without Attachment** and **Send With Attachment** button in **Submission Wizard**

Document

### Submission Email Logo

← Back to List: Documents

**Document Detail**

[Edit Properties](#)
[Delete](#)
[Replace Document](#)
[Email Document](#)

Document Name	Submission Email Logo
Document Unique Name	Submission_Email_Logo
Internal Use Only	<input type="checkbox"/>
Externally Available Image	<input checked="" type="checkbox"/>
Document Content Searchable	<input type="checkbox"/>
Folder	<a href="#">Shared Documents</a>
Author	<a href="#">Henry Abenaim</a> <a href="#">[Change]</a>
File Extension	png
MIME Type	image/png
Size	3KB
Description	
Keywords	
Image	
Created By	<a href="#">Henry Abenaim</a> , 5/15/2014 5:56 AM
Modified By	<a href="#">Henry Abenaim</a> , 5/19/2014 4:25 AM

**Figure 31 – Submission Email Logo**

## 11 Set Funding Application as a Default App

- Set Funding Application as a Default App for All Profiles and Make Custom Tab Visible
- Go to the Profiles and make Funding App as a default app.

Profile  
System Administrator

Find Settings... | Clone Edit Properties

Profile Overview > Assigned Apps

Assigned Apps Edit

App Name	Visible	Default
Action Plans	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AMLSys	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assignment Groups	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Call Center	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CFTsys	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Conga Composer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Content	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DocuSign For Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Funding Automation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Geopointe	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Google AdWords	<input checked="" type="checkbox"/>	<input type="checkbox"/>
GridBuddy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lead Conversion	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lead Scoring	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Figure 32 – Profile Setting

## 12 Opportunity Stage Field Changes

- To display proper progress bar on Opportunity detail page, we need to match the Opportunity Stages as in Progress Bar formula field.
- Go to the **Opportunity Stage** field and match the Stage values as mentioned below or as used in **Progress\_Bar\_\_c** formula field.
- **Opportunity Stages** -
  - Prospecting
  - Application Sent
  - Application In
  - Application Missing Info
  - Underwriting
  - Approved
  - Declined
  - Agreement Requested
  - Agreement Sent
  - Agreement Signed
  - Funded
  - Closed Lost
  - Renewal Prospecting
  - Renewal Requested

## **13 Conga Template Configuration**

- **Funding Application Template**
  - Upload the Funding Application PDF in Conga Template
  - Steps:
    - 1) Create a Funding Application PDF.
    - 2) Open Conga Template.
    - 3) Create a new Funding Application Template.

## 14 Conga Email Template Configuration

- Offer Email Template

- Create Email Template with name as 'Offer' as shown in *Figure 33*.

Conga Email Template  
CET-00000

Customize Page | Edit Layout | Printable View | Help for this Page

Notes & Attachments (0)

Conga Email Template Detail

Buttons: Edit, Delete, Clone, Advanced Editor

Email Template Name: CET-00000  
Owner: Henry Abenaim [Change]

Name: Offer  
Description: Email Template used on Send Offer Button on Opportunity

Template Group

▼ Email Content

Subject: Opportunities Offer

HTML Body: Hi {{ACCOUNT\_NAME}},  
We have received following offers.

Name	Funder	Amount	Rate	Term (Months)	Approval Date	Opportunity
{{TABLESTART.OFFERS}}{{OFFER_NAME}}	{{FUNDER_NAME}}	{{OFFER_AMOUNT}}	{{OFFER_RATE}}	{{OFFER_TERM_MONTHS}}	{{OFFER_APPROVAL_DATE}}	{{OPPORTUNITY_NAME}}{{TABLEEND.OFFERS}}

Should you have any questions, please let me know.  
{{USER\_FULLNAME}}  
{{USER\_COMPANYNAME}}

Text Body

Chat

Figure 33 – Offer Email Template

- Funding Application Template

- Create Funding Application Email Template as shown in *Figure 34*.

Conga Email Template  
CET-00001

Customize Page | Edit Layout | Printable View | Help for this Page

Notes & Attachments (0)

Conga Email Template Detail

Buttons: Edit, Delete, Clone, Advanced Editor

Email Template Name: CET-00001  
Owner: Henry Abenaim [Change]

Name: Funding Application Template  
Description

Template Group

▼ Email Content

Subject: Funding Application - {{ACCOUNT\_NAME}}

HTML Body: Hi {{ACCOUNT\_NAME}},  
Attached please find the Funding Application. Please review and send back the signed copy.  
Should you have any questions, please let me know.  
{{USER\_FULLNAME}}  
{{USER\_COMPANYNAME}}

Text Body

Created By: Henry Abenaim, 3/4/2014 5:34 AM  
Last Modified By: Henry Abenaim, 5/16/2014 7:20 AM

Buttons: Edit, Delete, Clone, Advanced Editor

Figure 34 – Funding Application Conga Email Template

## 15 Conga Queries Configuration

- **Applicable only if there is Conga in the Org.**
  - Offer Query
    - Used in Send Offer functionality.
    - Create a Conga Query with Name as 'Offer'.
    - Steps:
      - 1) Click **Conga Query Builder**.



Figure 35 – Conga Query Builder button on Conga Query

- 2) Create Query as shown in *Figure 36*.

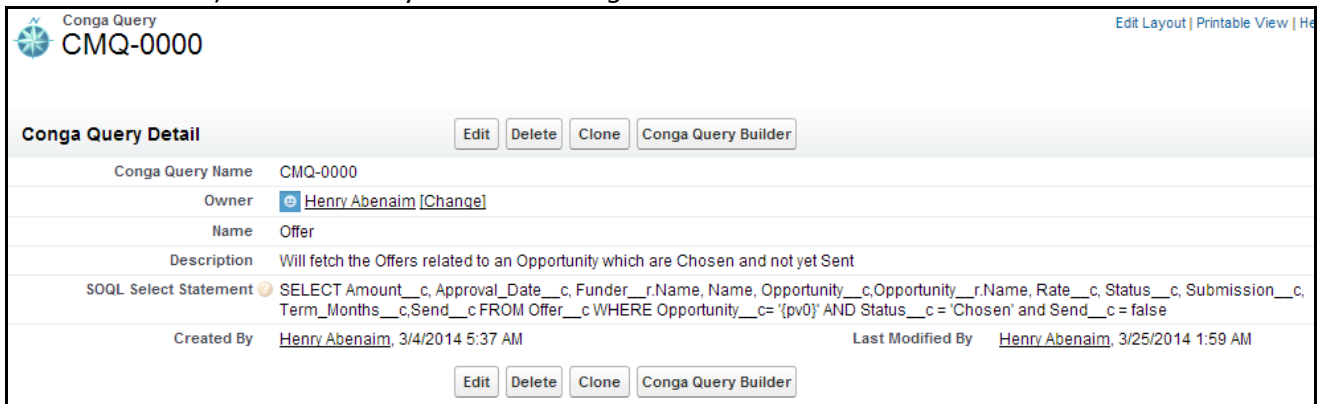


Figure 36 – Offer Conga Query

**NOTE** – The field names will change in the query, append the Package prefix with the fields

- Owner1 Query
  - Used in Funding Application PDF.
  - Create a Conga Query as shown below.

Conga Query CMQ-0001

« Back to List: Conga Queries

**Conga Query Detail** Edit Delete Clone Conga Query Builder

Conga Query Name	CMQ-0001
Owner	Henry Abenaim [Change]
Name	Owner1
Description	Contains the query to get the Owner 1 for Funding Application
SOQL Select Statement	SELECT Name, Title, Of_Ownership__c, MailingStreet, MailingCity, MailingState, MailingPostalCode, HomePhone, Social_Security_Number__c, Birthdate, Drivers_License__c, FirstName, LastName from Contact WHERE Id='{pv0}'
Created By	Henry Abenaim, 5/15/2014 6:22 AM
Last Modified By	Henry Abenaim, 5/26/2014 1:55 AM

Edit Delete Clone Conga Query Builder

Figure 37 – Owner1 Conga Query

- Owner2 Query
  - Create a Conga Query as following Query.

Conga Query CMQ-0002

« Back to List: Custom Labels

**Conga Query Detail** Edit Delete Clone Conga Query Builder

Conga Query Name	CMQ-0002
Owner	Henry Abenaim [Change]
Name	Owner2
Description	Contains the query to get the Owner 2 for Funding Application
SOQL Select Statement	SELECT Name, Title, Of_Ownership__c, MailingStreet, MailingCity, MailingState, MailingPostalCode, HomePhone, Social_Security_Number__c, Birthdate, Drivers_License__c, FirstName, LastName from Contact WHERE Id='{pv1}'
Created By	Henry Abenaim, 5/26/2014 2:00 AM
Last Modified By	Henry Abenaim, 5/26/2014 2:00 AM

Edit Delete Clone Conga Query Builder

Figure 38 – Owner2 Conga Query