iTools

Opportunity Status Monitor

Configuration Guide

Last Revised: February 25, 2022

Welcome

Thank you for choosing iTools for Salesforce by InSitu Software. If you recently purchased iTools, welcome to a robust collection of Salesforce.com tools that will enhance your Salesforce experience. If you are currently evaluating our tools, we hope that you, like a growing number of Salesforce users, find them to be an invaluable addition to Salesforce.com.

This configuration guide assumes that the iTools Configuration Manager has already been installed and will lead you through the installation process and configuration of iTools Opportunity Status Monitor.

About iTools Opportunity Status Monitor

Exclusively designed for sales professionals, sales managers and executives, the iTools Opportunity Status Monitor automatically tracks your sales opportunities and provides the information you need to improve sales productivity and effectiveness. With the powerful combination of configurable evaluation criteria, a robust scoring mechanism and continuous analysis, the iTool will help you accelerate your sales pipeline velocity, increase your sales forecast accuracy and ensure sales team accountability. And, since no two sales organizations are alike, it has been engineered with flexibility in mind. Use one configuration for your entire sales team or create custom configurations for specific teams or individuals.

Accelerate Sales Pipeline Velocity

As most experienced sales executives will tell you, *time kills all deals*. If opportunities remain stagnant for too long a period, you risk the chance of losing the deal. Through intelligent measurement and improved communication, iTools Opportunity Status Monitor won't let stagnant or overdue deals go unnoticed. With the iTool, at-risk accounts are identified, and alerts issued, allowing you to quickly pinpoint what needs to be done to move opportunities along for a faster close and positive outcome.

Increase Sales Forecast Accuracy

Forecasting sales is never easy. While there are many different approaches and methodologies to achieving an accurate forecast, they all agree you can't do it with missing or incorrect information. iTools Opportunity Status Monitor's stage dependent required fields helps connect the collection of information with the stage at which it is necessary, known and most accurate. They can also be used to ensure key milestones are achieved on a timely basis. And, since all opportunity data is not necessary or known at the same stage by every team, you have the flexibility to customize the rules accordingly.

Equally as important for a sales manager, is being aware of any unexpected change that impacts the forecast. With iTools, you are instantly alerted of changes in an opportunity that warrant further review, allowing you to respond quickly with the information you need to engage your sales team in a productive conversation.

Ensure Sales Team Accountability

As a sales leader, you know that your sales organization can perform better, but it's hard to improve when you don't have the right measurements and monitoring in place. Use iTools Opportunity Status Monitor to help detect those situations where momentum has stalled, and corrective action is needed to get things back on track. No recent activity, no defined next step and overdue tasks are certain red flags that will negatively influence the sales opportunity if not identified and monitored throughout every stage in the process. The iTool is the automated detection system you need to stay on top of every deal and make sure sales activities are executed according to plan.

Improve Communications

With configurable email alerts, Chatter posts, reports and dashboards, the iTools Opportunity Status Monitor brings critical information to sales leadership in a timely and easily digestible manner. For the ultimate sales analysis view, check out the comprehensive iTools Opportunity Scoreboard which positions opportunities into quadrants based on value and probability while highlighting the overall opportunity status. Instantly, you can identify which at-risk deals need immediate attention based on their relative value and likelihood of closing. With a variety of filter and display options, the Scoreboard view will become sales management's most valued asset.

Align with your Sales Plans and Best Practices

Flexible and robust configuration options make it easy for the iTools Opportunity Status Monitor to seamlessly integrate with your sales methodology and practices. Customize what you want to monitor, the thresholds that define the alert conditions, the overall opportunity status value ranges, your notification preferences and more. Vary the criteria, scoring and actions based on current stage as well as opportunity owner.

But most importantly, no programming skills or formula wizardry is required to create and configure the iTools Opportunity Status Monitor. While careful planning is recommended when designing the overall configuration, simple point and click actions are all that is needed to implement.

Lightning Support

The iTools Opportunity Status Monitor fully supports the Salesforce.com Lightning user interface as well as the Classic user interface. All the user interface components have been designed to style themselves based on the user interface of the current user. This means you can easily use iTools in an all Classic org, an all Lightning org, or one with some users using Classic and some using Lightning. iTools will even support those users that switch between user interfaces depending on their task.

Installation and Configuration Overview

This guide is designed to lead you through the necessary installation and configuration steps for iTools Opportunity Status Monitor. It may look lengthy and complex, but its step-by-step instructions, along with its visual format, will ease you through the process. There are three basic parts to the process. To begin, this guide shows how to install the iTools Opportunity Status Monitor into your Salesforce environment. Second, it leads you through the process of deploying and configuring iTools Opportunity Status Monitor and each of its' feature sets. You do not have to activate and configure every feature of the tool so some sections in this portion of the guide can be skipped. We do encourage you to at least read the introduction to each feature so you become familiar with what iTools Opportunity Status Monitor can do to help monitor your open deals and keep your sales teams on track. Finally, this guide explains how to properly apply Opportunity Status Monitoring licensing. Although every effort has been made to provide complete instructions, if at any time, you encounter issues or have questions, please contact us using any of the methods described in the *Help and Support* section at the end of this document.

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Version Updates

If you are an existing iTools Opportunity Status Monitor customer but haven't kept up with each new release, here is a brief review of the enhancements we have added to the product over the last couple of releases. If you would like to upgrade your current version to the latest release simple follow the installation instructions and install the latest version from AppExchange right over top of your current install. iTools knows when it needs to do an upgrade and will update you to the latest version without impacting your configuration or licensing. It's easy and for current subscribers its free!

New In Version 4.9

Support for the Opportunity Level OSM Profiles: The set of "rules" used to evaluate an Opportunity, called an OSM Profile, is normally determined by the OSM Profile associated with the Opportunity's owner. With this new feature you can override that association and specify a different profile to be used on individual Opportunities.

New In Version 4.0

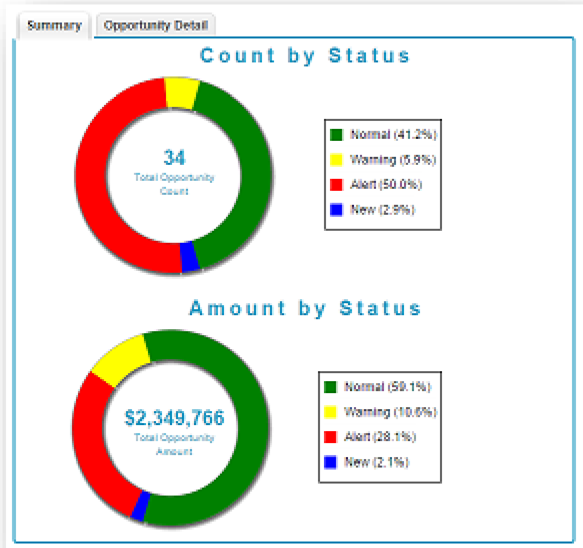
Support for the Salesforce.com Lightning User Interface: All the pages in Opportunity Status Monitor now style themselves dynamically depending on the user interface of the current user. iTools has always worked in Lightning but now it supports that fresh look and feel.

New In Version 3.0

Based on direct feedback from our customers, versions 2.17 through 3.0 include the following feature enhancements:

Include Any Opportunity Field on the Scoreboard Summary: Add any opportunity field(s), including custom fields, to the opportunity detail displayed on the right hand side of the Opportunity Scoreboard.

New Grid Summarization Charts: The Opportunity Scoreboard now includes a graphical summarization of the set of opportunities displayed in the grid.



Support for including any Opportunity field in the Notification Emails: Email messages sent to users when Opportunity Status Alerts are generated can now include tokens for any Opportunity field.

Exclude Opportunities from Monitoring by Rule: You now have the ability to exclude certain opportunities from the status check monitoring process based on a "rule" such as those whose amount is less than a certain value.

Support for Required Formula Fields: Using formula custom fields and the OSM required field monitoring, the types of status checks you can perform is near limitless. For example, a simple rollup summary on Opportunity Product and a checkbox formula that checks if the count is greater than zero can be used to implement a status check requiring a product be defined before a certain stage is reached.

Ability to Designate which Activities Count: You now have the ability to control which activities count when testing for recent activity. Use this new mechanism to exclude Marketing activities and system activities that don't represent activity related to closing the deal.

Hide Unused Fields on the Opportunity Detail: You can now hide the Expected Amount, Last Activity, Created Date, Probability, and Owner fields on the scoreboard's opportunity detail section.

Set the X-Axis Label: Using a field other than Amount for the x-axis of the scoreboard? Now you can change the text of the x-axis label to match the field you are using.

Permission Sets: iTools Opportunity Status Monitor now includes its own set of Permission Sets for sites that wish to control access to the status information and scoreboard. You can also use the permission sets to allow users other than the opportunity owner to run a status check on a specific opportunity.

Before You Begin

iTools are designed for use with Salesforce.com Professional, Developer, Enterprise, Unlimited, and Performance editions and their sandboxes. Installation into any other edition, including Team and Group Editions, is not supported.

If you are installing into a Professional Edition, your account Profile must be System Administrator. To install the iTools Opportunity Status Monitor into any other supported edition, your user profile must include permission to Download AppExchange Packages and Manage Package Licenses. If your user profile is the standard System Administrator, you will, by default, already have these permissions.

In addition to the proper permissions, the iTools Configuration Manager version 5.0 or higher must be installed and a license assigned to your account.

Periodically Salesforce will change the user interface to improve the usability of the Salesforce application or the AppExchange marketplace. Many times, these changes only take effect when you enable an option in the **User Interface** section of Setup. This guide will attempt to reference navigational steps and screen shots using the latest version of the Salesforce user interface. There will be times, however, when Salesforce releases a new interface before a new version of this guide is released. There will also be cases when this guide references a version of the user interface that you have not enabled in your Salesforce environment. If you encounter a situation where you are unable to translate any of these differences, please contact our support organization and they will be more than happy to assist you.

As part of the **iTools Opportunity Status Monitor** installation process a batch job is run that will update all your open opportunities. These updates are made only to fields added by iTools, however, the process will set the Last Modified By field to your user account and the Last Edited Date field to the date and time of the install.

Installing iTools Configuration Manager

In addition to the proper permissions, the iTools Configuration Manager, version 6.0 or higher, must be installed and a license assigned to your account. The iTools Configuration Manager is a prerequisite package and provides license management and configuration setting functionality for all iTools in the collection. If you have already installed the iTools Configuration Manager, you can skip this section and continue with the next section.

To install the iTools Configuration Manager:

1. Go to the AppExchange located at:

   https://appexchange.salesforce.com/

2. Locate the listing for **iTools Configuration Manager** by searching for "iTools Configuration Manager" or direct your browser to:

   https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000001O7eMEAS

3. Click the **Get It Now** button and follow the installation prompts. When asked to choose the initial access to package resources be sure to select **Install for Admin Only**.

If you would like more detailed step-by-step instructions for installing the iTools Configuration Manager, please see the iTools Configuration Manager Configuration Guide available on the tool's AppExchange listing or on our website at https://www.insitusoftware.com/itools-documentation

Installing iTools Opportunity Status Monitor

iTools Opportunity Status Monitor can be installed from the Salesforce AppExchange into your environment by simply following the instructions below:

1. Go to the AppExchange located at:

   https://appexchange.salesforce.com/

2. Locate the listing for **iTools Opportunity Status Monitor** by searching for "iTools Opportunity Status Monitor" or direct your browser to:

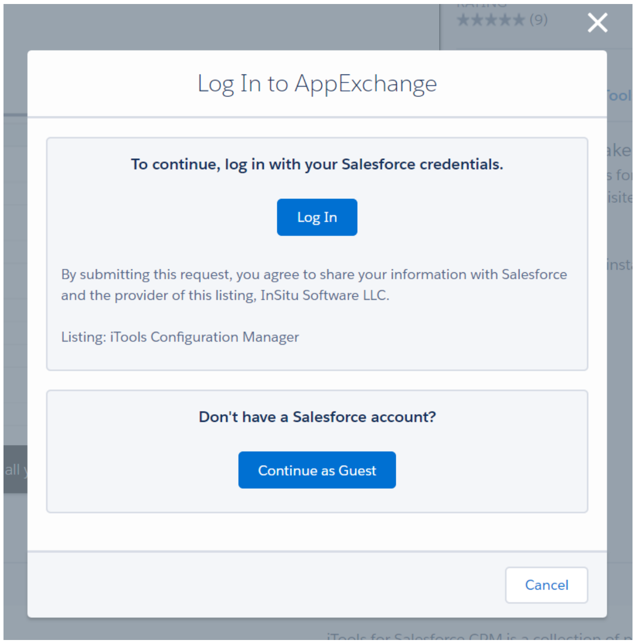
https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000003IS9qEAG

Make sure you are on the AppExchange listing for the **iTools Opportunity Status Monitor**. iTools for Salesforce is sold as a single subscription but each individual iTool is installed separately and has its own similar looking AppExchange listing. Using separate listings ensures that you can install only the iTools that you need in your environment.

If you accessed the AppExchange from the AppExchange Marketplace link in the Setup section of Salesforce.com and are using the Lightning user interface, the next couple of steps may vary slightly in the details but the basic steps for starting the install will be the same.

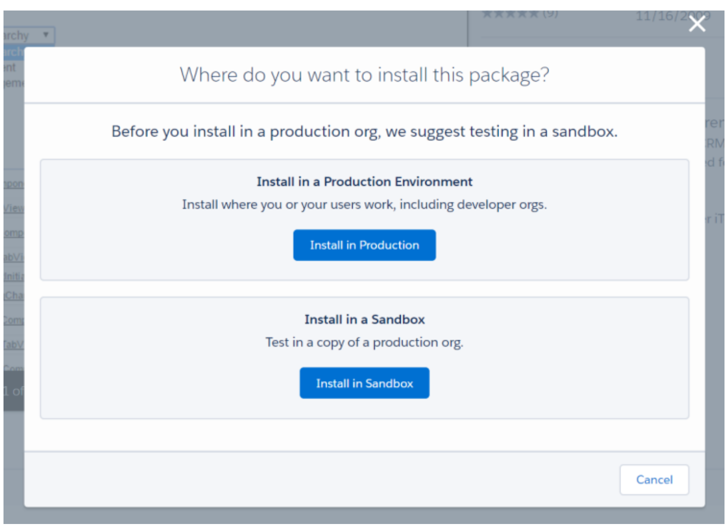
3. Click the **Get It Now** button**.**

4. If you have not already logged into the AppExchange you will be asked to do so before you can continue with the install. If prompted, click the Log In button and provide your Salesforce.com credentials as requested.



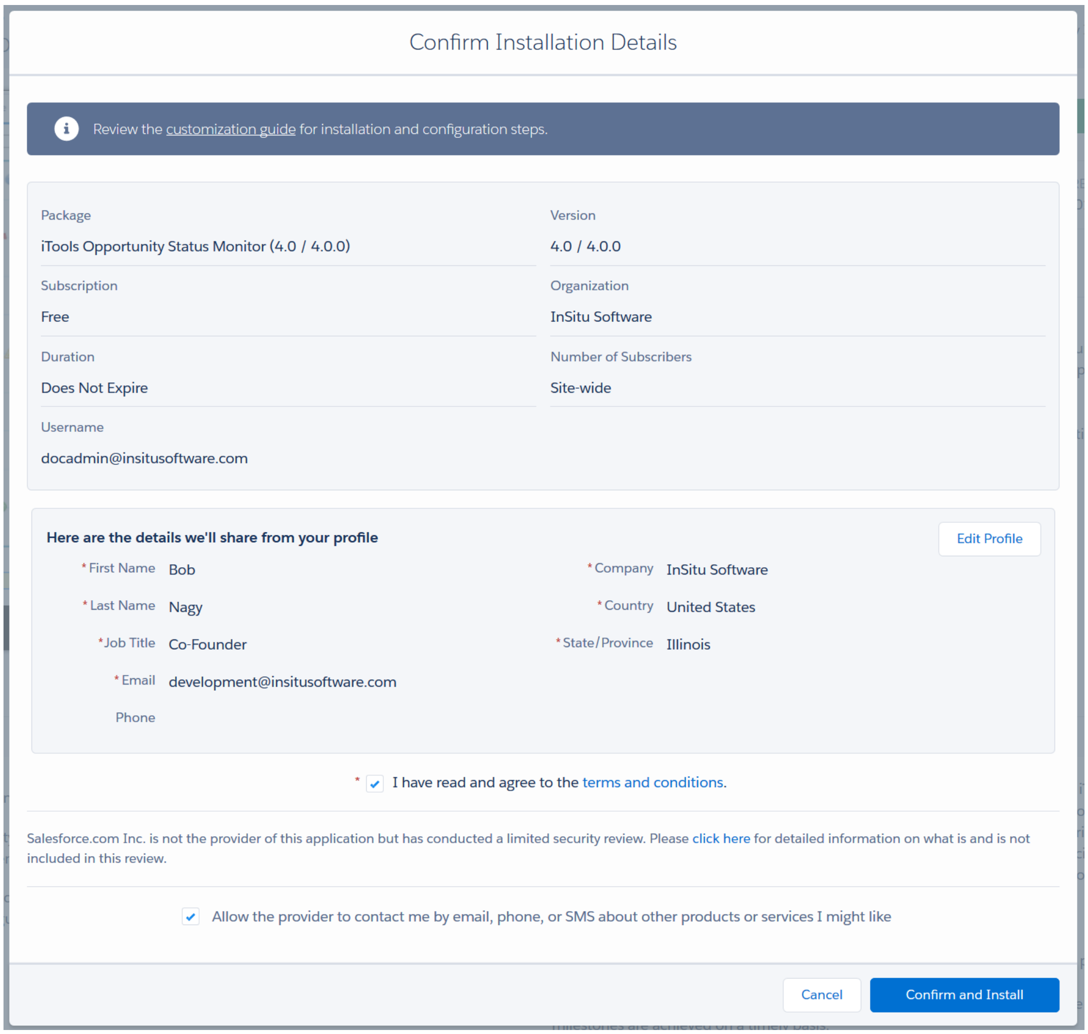
After logging in you may be returned to the iTools Opportunity Status Monitor listing page and will need to click the **Get it Now** button again.

5. Next you must choose whether to install iTools Opportunity Status Monitor into a Production or Sandbox Environment. iTools will work properly in either environment.



If you are installing into a sandbox org, Salesforce may request additional login credentials for the specific sandbox org you will be using.

6. The next step is to confirm the installation details, ensure that all required user profile information is filled in, collect agreement to the package's terms and conditions, and indicate if InSitu Software is permitted to contact you regarding other products and services. When you have provided the required information and agreed to the terms and conditions by checking the check the box at the bottom of the screen labeled **I have read and agree to the above terms & conditions**, click the **Confirm and Install** button.



7. Choose the initial access to package resources.

   For users to be able to use iTools Opportunity Status Monitor they must be granted permission to access the tabs, custom objects, custom fields, Apex classes, and Visualforce pages that make up the application. This access can be granted either by updating the user's profile or by creating and assigning the user the appropriate

Permission Set. At this step in the installation process you must decide between two approaches to granting users access to the Opportunity Status Monitor resources:

Install for All Users

If you chose this option, the installation routine will update all your custom Salesforce account profiles so that all users will have access to all the package's resources. This does not necessarily mean every user will be able to use the Opportunity Status Monitor tool, they must still be allocated licenses, but you will not have the additional configuration step of assigning Permission Sets to the proper iTool users.

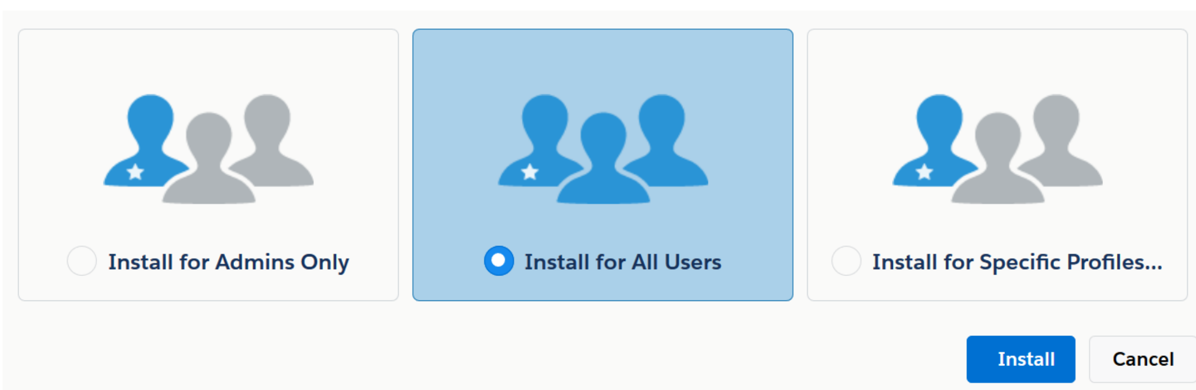
Install for Admins Only

Choose this option if you plan to make iTools Opportunity Status Monitor resources visible to the appropriate users through the assignment of Permission Sets.

Install for Specific Profiles…

Choose this option if you plan to make iTools Opportunity Status Monitor resources visible only to users you know are assigned to a specific set of User Profiles.

InSitu Software recommends you choose the **Install for All Users**.



If you currently use the Professional Edition of Salesforce, you will not be given the option to which set of users have access to the package's resources. iTools Opportunity Status Monitor is, however, fully functional in the Salesforce Professional Edition.

8. Click **Install** to complete the installation process. The install of the iTools Opportunity Status Monitor package generally requires only a minute or two but may take longer if the Salesforce.com services are being heavily utilized. If the install requires more than a minute or so to complete you will be informed on screen of the delay and an email will be sent to you when the install is complete.

If you did not install the iTools Configuration Manager version 6.0 or greater before attempting to install iTools Opportunity Status Monitor, you will receive an email from Salesforce indicating the install failed. The problem section of that email will indicate something like:

> (iTools Configuration Manager 6.0) A required package is missing Package "iTools Configuration Manager", Version 6.0 or later must be installed first.

Check Initialization Results

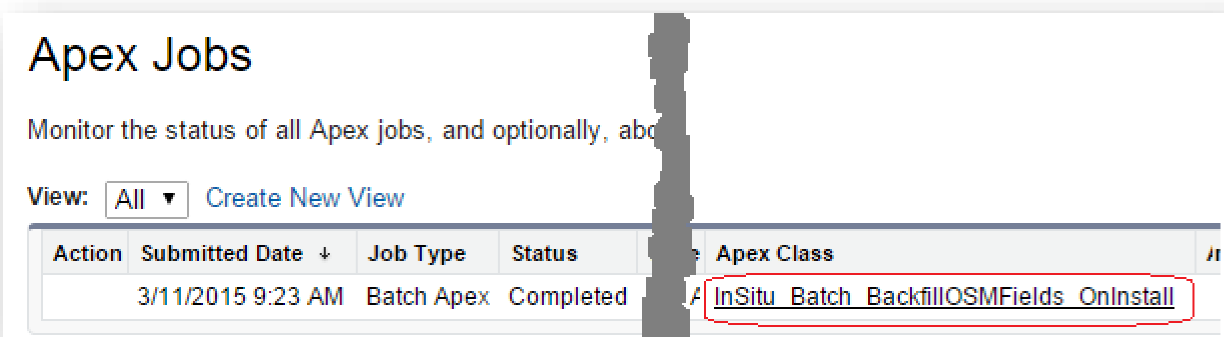
As part of the installation process the iTools Opportunity Status Monitor automatically started a batch Apex job. The purpose of this batch job is to initialize several new Opportunity custom fields. These fields were added to the Opportunity object as part of the iTools Opportunity Status Monitor installation. The values in these fields are used to record monitoring information needed to support the many features provided by the iTool.

The initialization batch Apex job is also important in that it tests to make sure all open opportunities can be updated by the iTools Opportunity Status Monitor. Any opportunity that fails during this initial process is also likely to fail when the status check process is run as part of the on-going monitoring process.

Depending on the number of open Opportunity records in your Salesforce CRM system, it may take a while for all opportunities to be updated by the initialization process. To monitor the progress and status of the batch Apex Job, follow these steps:

a. Access the list of Apex Jobs by going to **Setup | Jobs |Apex Jobs.**

b. Locate the entry in the Apex Jobs list with the value **InSitu_Batch_BackfillOSMFields__OnInstall** listed in the Apex Class column. The iTools Opportunity Status Monitor Initialization job will be completed when the number in the **Batches Processed** column is equal to the number in the **Total Batches** column.



In addition to the status information provided in the Apex Jobs list, the system will also send you an email notification message letting you know if all open opportunities could be updated and how many licenses are required to monitor all your opportunities. If any problems were detected during the initialization details regarding each issue will be included in the body of the email message. To ensure proper message delivery, only the first 50 opportunities that could not be updated will be listed in the notification message.

Subject: iTools Opportunity Status Monitor: Initialization failed

The iTools Opportunity Status Monitor Initialization batch job was not able to properly initialize 2 of your open Opportunities.

The most likely cause of an error during initialization is the failure of a particular validation check. Keep in mind that the initialization process will update every open opportunity and during the update will perform its normal validation checking. If the state of any open opportunity record causes one of the validation checks to fail, then that failure will generate an error for that opportunity.

If this is the cause of the initialization failure, correct the currently invalid opportunity(ies) and run the initialization process again. Details regarding re-running the initialization process are provided in the iTools Opportunity Status Monitor Configuration Guide or contact InSitu Software technical support at support@insitusoftware.com for assistance.

Errors were reported when updating the following opportunities:

INVALID General OSM Test Oppty (ID = 006A0000004Qc1FIAS). Status Code = FIELD_CUSTOM_VALIDATION_EXCEPTION. Error: The opportunity name cannot begin with the word INVALID | To view item click here.

INVALID United Oil Refinery Generators (ID = 006A0000004ePYTIA2). Status Code = FIELD_CUSTOM_VALIDATION_EXCEPTION. Error: The opportunity name cannot begin with the word INVALID | To view item click here.

If you are unable to determine the cause of the errors or would like additional assistance, please contact or forward this message to InSitu Software technical support at support@insitusoftware.com.

If the message includes one or more references to individual opportunity record(s), then the error occurred when the Initialization process was attempting to update the opportunity's new custom fields. The most likely cause of an error during the update of an opportunity record is the failure of a validation check. Keep in mind that any time a record is updated, the system will perform its normal validation checking. So, if the state of any open opportunity record causes one of the validation checks to fail, then that failure will generate an Apex job failure.

The two most common validation checks are:

- Required Field: value must be provided when object is saved.
- Validation Rule: condition (formula expression) evaluates to 'true' when object is saved.

Important Note: When a field is added or updated to be 'required' or a validation rule is created, Salesforce does not execute the validation check on all existing records to determine which ones are not compliant. Instead, the system will 'raise' an error on a non-compliant record the next time it is updated. So, if a non-compliant record exists in your system and happens to be one that is processed by the Initialization process, then that non-compliant opportunity record will fail to initialize and be included in the notification message. To correct the initialization failure, you must correct the non-compliant record.

If the status detail includes the phrase:	Action required:
REQUIRED_FIELD_MISSING, Required fields are missing	Add a value in the required Opportunity field
FIELD_CUSTOM_VALIDATION_EXCEPTION	Update the field value to be in compliance with the validation rule.

The message detail will include the unique Salesforce ID of and a hyperlink to the Opportunity record on which the failure occurred. You can use either of these values to find the specific opportunity that needs correction. Once all non-compliant Opportunity records have been updated, the Apex Job should be re-run. To initiate the Apex Job follow these steps:

1. Access the iTools Settings Tab
2. Select Opportunity Status Monitor in the **iTool** dropdown at the top of the page
3. Click on the **Maintenance** tab
4. Click on the **Add Settings** button

If all non-compliant records have been corrected, then the Initialization Process Completion message will indicate a successful completion. If you continue to receive errors and cannot determine the cause, please contact InSitu Software at support@insitusoftware.com.

When the Initialization process has completed without error, you will receive an email message with the subject line “**iTools Opportunity Status Monitor: Initialization successful**”. This message will not only indicate the successful completion of this configuration task, but the body of the message will indicate the number of unique users that currently own open opportunities. You should make sure that you have purchased at least that many iTool user licenses so that the Status Check process will be able to monitor all your open opportunities. Additional details regarding the licensing of iTools Opportunity Status Monitor can be found in the *Licensing* section of this guide.

iTools Settings

All iTools, including Opportunity Status Monitor, include an extensive set of configuration settings used to control the appearance and behavior of the tool. These settings, called iTools Settings, belong to the iTools Configuration Manager package and are viewed and updated via the iTools Settings tab.

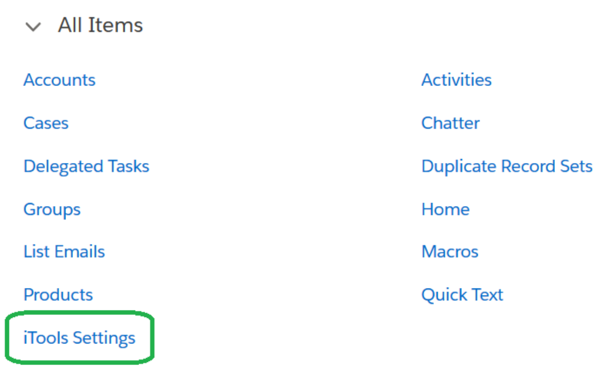
Throughout this guide, specific iTools Settings will be referenced and you may be instructed to set them to a certain value to affect the behavior or appearance of Opportunity Status Monitor. All references to individual iTools Settings will appear in this guide as follows:

ExampleSetting

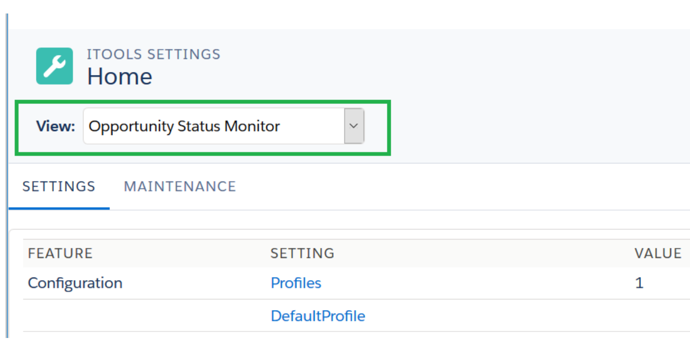
To access a specific setting follow these simple steps:

If you are using the Lightning User Interface

1. Click the "nine dot" icon in the top left of any page.
2. Click the iTools Settings option in the All Items section



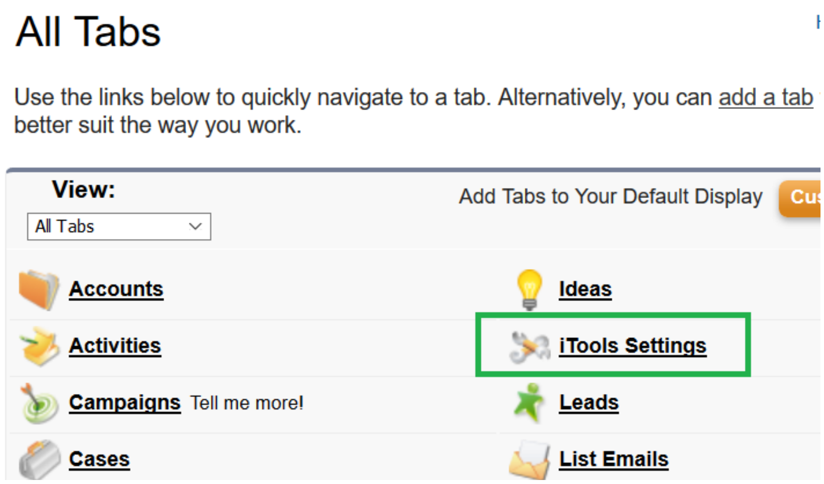
3. Select "Opportunity Status Monitor" in the View dropdown list if it is not already selected.



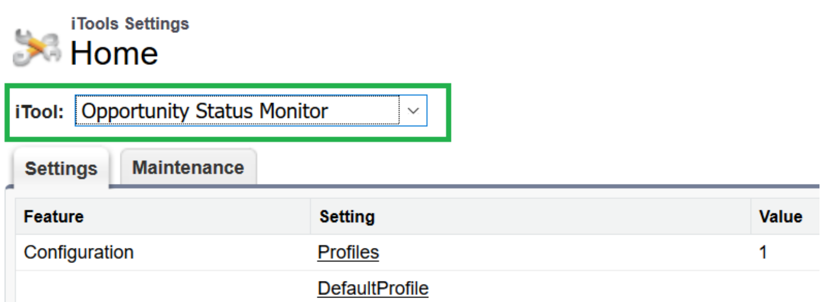
4. Locate the referenced setting in the Setting column and click it.

If you are using the Classic User Interface

1. Click the “plus” tab at the far right of the tab bar.
2. Click the iTools Settings option in the list of All Tabs



3. Select “Opportunity Status Monitor” in the iTool dropdown list if it is not already selected.



4. Locate the referenced setting in the Setting column and click it.

Where screen shots are needed in this guide to point out additional options within an iTools Setting, the Lightning UI version of the page will be used. The Classic UI version of the page will contain the same fields and buttons and behave in an identical manner, it will simply look a bit different. Either user interface can be used to manage any of the individual iTools Settings.

Configuring Status Checks

Total Alert Score

The Total Alert Score is a calculated, numeric score that provides an indication of how well, or not so well, the opportunity is adhering to your organization's prescribed sales process. This score is stored in an iTools custom field and is calculated for each open opportunity processed by the iTools Opportunity Status Monitor during a Status Check.

An opportunity with a Total Alert Score (TAS) of 0 is one that meets all the status check conditions you have enabled and configured. While a TAS of 0 is no guarantee of winning a deal, it does indicate that your sales process is being followed and the chances of losing the deal due to poor execution are much lower. On the other hand, opportunities with a high TAS have a much greater chance of failing and/or inaccurately impacting your forecast.

An opportunity's Total Alert Score is calculated like a Roll-up Summary field, where its value is the summarization of alert score values from individual Status Alerts currently associated with the opportunity. A Status Alert is created for the opportunity when it fails to meet the criteria/rules of a particular Status Check condition. Just like a Roll-up Summary value, the TAS value will adjust as Status Alerts are added to or removed from the Opportunity. Each time an opportunity is evaluated by the iTools Opportunity Status Monitor, new Status Alerts can be added, or existing alerts removed based on the current state of the Opportunity and the Status Check configuration.

Currently, there are 9 different status check conditions, each of which can be enabled and configured with an alert score value. If an opportunity fails to meet a particular condition, iTools will create a Status Alert with the given alert score value. Here is an example of how the Total Alert Score is calculated using a hypothetical configuration:

Condition	Alert Score	Status Check	Status Alert Created?	Status Alert Score
1	5	Fail	Yes	5
2	10	Succeed	No	0
3	15	Succeed	No	0
4	20	Fail	Yes	20
Total Alert Score				**25**

Because all sales organizations are different, the iTools Opportunity Status Monitor status checking process has been designed to be very flexible, allowing you to customize it to fit the specific needs of your organization. As a result, there is no *right* way to configure the individual status check conditions. Simply consider the relative importance or weight that should be applied to a particular condition and assign the alert score accordingly. The more important the condition or the more 'at risk' it would place an opportunity, the higher the alert score should be relative to the other alert score values.

Designing your Alert Score Schema

Here are a few ideas that may help you when designing the alert score schema for your organization:

- An opportunity is assigned an overall status based on its Total Alert Score and the range established for each of the three Opportunity Status values. The Status values and Total Alert Score ranges are set up as follows:

Status	Total Alert Score*	Response to Opportunity
Normal	0	No additional attention needed.
Warning	> **MaximumNormalScore** <= **MaximumWarningScore**	Requires some attention to get the opportunity back on track.
Alert	> **MaximumWarningScore**	Requires additional attention; may need involvement from sales management.

  * The numeric values that determine Total Alert Score ranges are configured using the iTools Settings, **MaximumNormalScore** and **MaximumWarningScore**. See the *Configuration Options* section of this configuration guide for additional details regarding these iTools Settings.

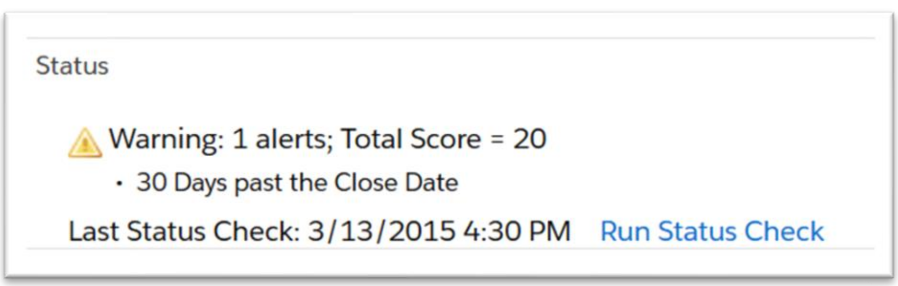
- Since the number of opportunity stages, the types of activities to be performed during each stage and the degree of importance of those activities in those stages may vary quite significantly in your organization, iTools provides the ability to set criteria and assign Alert Scores for each of the status check conditions ***for each stage***. These powerful stage-specific configurations enable you to more closely align the iTool with your sales process and sales management objectives.

For example, while it is usually important to maintain on-going interactions with an account throughout all opportunity stages, you may consider it ***most*** important for activity to be recorded as early as possible when the opportunity is in its initial stage. By setting certain criteria and assigning a higher alert score for conditions related to opportunities in the initial stage, your team can be assured that opportunities are well managed during those critical first days and nothing slips through the cracks.

- A Total Alert Score value for an opportunity is based on the OSM Profile that was used when it was calculated. Therefore, if the opportunity owner should change and the new owner is associated with a different OSM Profile, the Total Alert Score may also change - even though no opportunity actions were taken and no time has passed.
- The Total Alert Score is fully calculated each time the iTools Status Check is run. Therefore, if you change the alert score or criteria for an individual status check condition, the Status Check process will update the Total Alert Score value to reflect those changes the next time it is run.
- When an opportunity is closed, all associated Status Alerts are deleted and the Total Alert Score value is cleared.

Where Used

The most prominent use of the Total Alert Score is in the visual display of the Opportunity Status value shown on the Opportunity detail page:



The Total Alert Score is an incredibly valuable asset that can be used in many ways to more effectively manage your organization's opportunity management process and help you stay on top of your open opportunities. Some of the ways you could extend the use of the Total Alert Score include:

- Create “At-Risk” opportunity reports for salespeople and their managers by adding the criteria: *Total Alert Score greater than 0*.
- Sort Opportunity reports by the Total Alert Score (descending) so the most at-risk opportunities appear at the top. Create a Top-10 version and place it prominently on your Sales Dashboard.
- For those sales managers that prefer reports over email notifications, configure their team’s OSM Profile so no email alerts are sent. Then, set up an At-Risk Opportunities report to be sent to them on a regularly scheduled basis.
- Make it a standard agenda item in weekly meetings for the sales manager to review the At-Risk Opportunities report with each member of their sales team.
- Create dashboard components that rank members of a sales team based on overall or average Total Alert Score across all open opportunities they own.
- Assign a 'cost' value to the Total Alert Score to show the potential financial impact it may have. Simply create a custom formula field on the Opportunity object that multiplies the Amount or Expected Revenue field by the Total Alert Score. Then, use this new value instead of the Total Alert Score in your At-Risk Opportunities reports and dashboard to ensure your sales team stays focused on the $1,000,000 deal with a Total Alert Score of 20 before the $10,000 deal with a score of 60.
- Build email alert workflows based on changes in the value of the Total Alert Score field (and potentially other opportunity fields) to ensure proper management attention is given to significant deals whose execution is less than desired.

OSM Profiles

An Opportunity Status Monitor (OSM) Profile contains the criteria, scores and actions that are used by the iTools Status Check when it processes an opportunity that is owned by a user with that profile. Multiple OSM Profiles can be created so your organization can evaluate opportunities in accordance with the goals for an individual sales person or the team on which that person is a member. There are many different reasons to use multiple OSM Profiles including:

- Different sales teams are selling different products or services which have different sales cycles based on the cost, location, maturity of the market, or complexity of the products and services involved.
- Different sales managers have different styles with respect to the sales process including how closely they want to track their team's opportunities and when they want to be notified when deviations from that process occur.
- Newer members of a sales team need to be monitored more closely than experienced members of the team.
- Status alert descriptions and notification messages need to be in different languages for different teams.

Like Salesforce.com User Profiles, each user can be associated with one and only one OSM Profile. However, a user does not ***have*** to be associated with an OSM profile. This is because not every Salesforce user is an opportunity owner. Only those users who will be assigned as opportunity owners need to be associated with an OSM Profile. In the event a status check encounters an opportunity owned by a user that is not associated with an OSM Profile and a Default Profile is not specified, it will skip the evaluation and set the Opportunity status value set to 'No Profile'.

Each OSM Profile consists of 5 parts, all of which play an important role in the status check process. These parts include:

- General Settings – The profile name and attributes that determine who will receive status alert email notifications as well as the format and content of the message.
- Profile Users – The list of Salesforce.com users assigned to the profile.
- Status Check Settings – The criteria, score and action settings used by the Status Check when it evaluates an open opportunity.
- Required Field Settings – The list of opportunity fields that require a value and the stage in the sales process by which it must be provided.
- Open / Close Alert Settings – The format and type of notification to send when a new opportunity is created or an existing opportunity is closed.

Default Profile

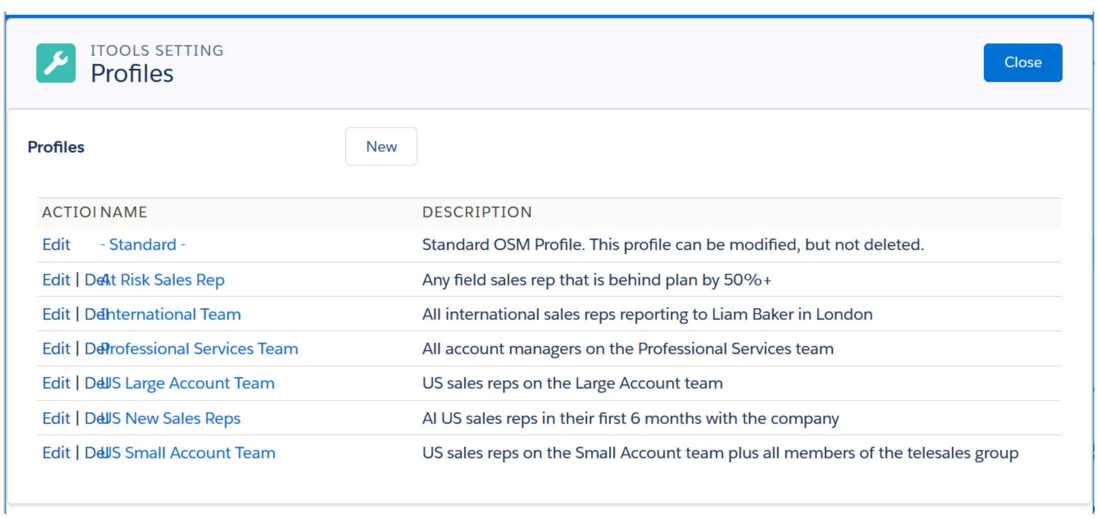
If only one OSM Profile is needed for your organization, you can simplify the process of associating users with that profile by designating a Default Profile. When a Default Profile is designated, it will be the profile used when the Status Check encounters an opportunity owned by a user that is not associated with an OSM Profile. A Default Profile is designated by editing the **DefaultProfile** iTools setting. Initially, the setting value is blank. See the *Configuration Options* section of this configuration guide for more details about updating the iTools **DefaultProfile** setting.

- Standard - Profile

iTools Opportunity Status Monitor provides one OSM Profile named '- Standard -'. This Profile cannot be deleted or renamed, but the setting values can be edited and users can be associated with it. The intent for the Standard Profile is that it be used as the Default Profile and/or the 'template' from which other profiles are created.

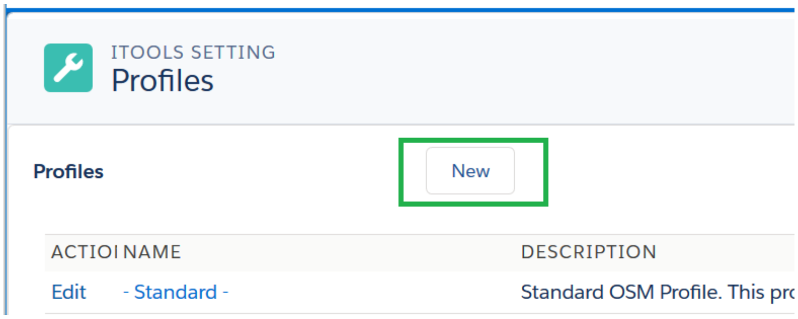
Accessing OSM Profiles

OSM Profiles are an extension of the iTools Settings mechanism and access like all other iTools Settings. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide. The list of all OSM Profiles is available by accessing the **Profiles** iTools Setting.



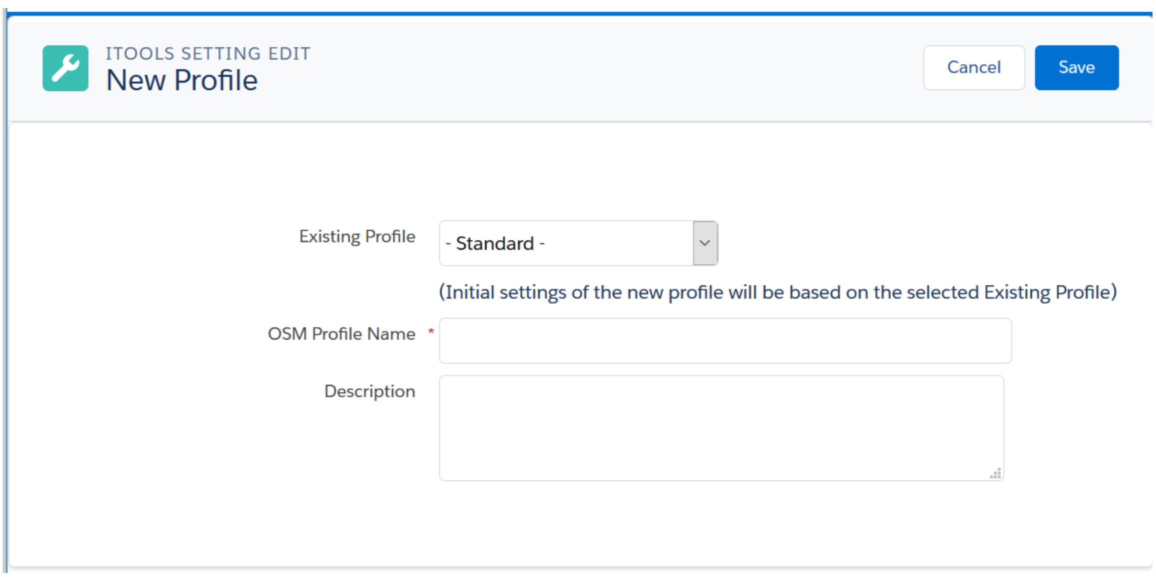
Create a Profile

1. To create a new OSM Profile, access the **Profiles** iTools Setting. Then, click on the **New** button to display the New Profile page.



2. Like Salesforce user profiles, you must select an existing OSM profile from the **Existing Profile** dropdown list to use as a base.
3. Enter an **OSM Profile Name** and **Description** (optional). Then, click the **Save** button.

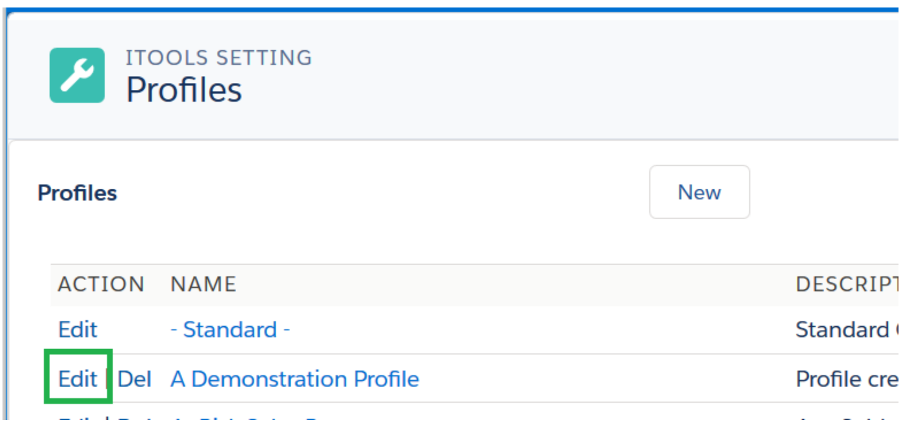
The new profile will be created with the same setting selections as the OSM Profile from which it was based.



General Settings

The OSM Profile General Settings include the profile name, description and attributes that determine who will receive status alert email notifications as well as the format and content of the message. To modify any of these settings:

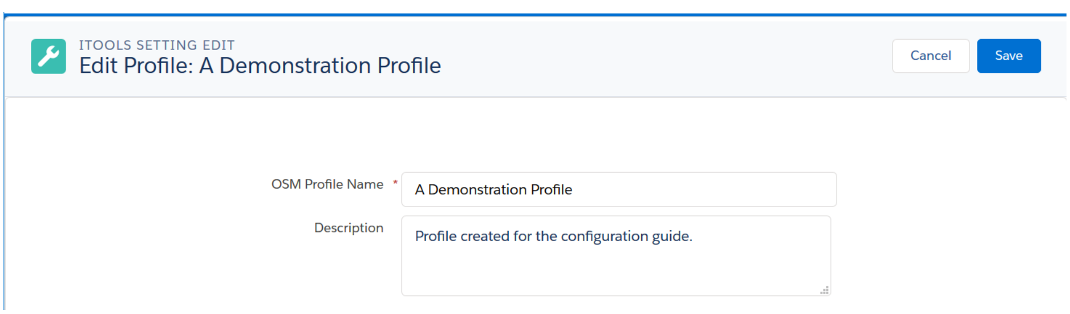
1. Select the **Profiles** setting from the iTools Settings. Then, click the **Edit** link next to the OSM Profile Name.



2. Update the values in any of the fields within the five sections.
3. Click **Save**.

The Edit Profile page is comprised of the following five sections:

OSM Profile Name and Description



OSM Profile Name

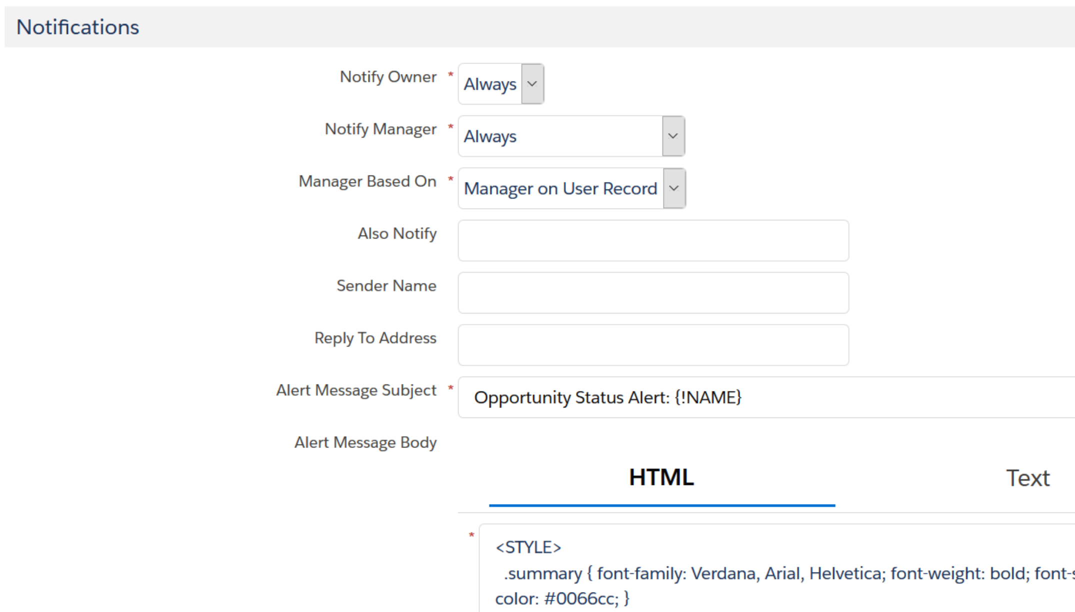
The profile name is used to identify the OSM Profile. A value is required and must be unique within the list of OSM Profiles created by your organization.

Since the '– Standard –' profile cannot be renamed, you will not be able to change the Name when editing that profile.

Description

The description is optional but strongly recommended when you have more than one OSM Profile.

Notifications



Notify Owner

The value designates if the owner of the opportunity is sent a Status Alert email notification. This setting applies to **Status Alert** notifications only. Possible values include:

- **Always** – The opportunity owner is always sent a Status Alert email.
- **Never** – The opportunity owner is never sent a Status Alert email.

Notify Manager

The value designates if and when the manager of the opportunity owner is sent a Status Alert email notification. This setting applies to **Status Alert** notifications only. Possible values include:

- **Always** – The manager of the opportunity owner is always sent a Status Alert email.
- **When Status = Alert** – The manager of the opportunity owner is only sent a Status Alert email when the opportunity is at or above the designated Alert Status level.
- **Never** – The manager of the opportunity owner is never sent a Status Alert email.

Manager Based On

The value designates what mechanism should be used to determine the opportunity owner's manager when iTools is configured to send notifications to the manager of an opportunity owner. This setting applies to both **Status Alert** and **Open / Close Alert** notifications. Possible values are:

- **Manager on User Record** – Select this option if your organization uses the Manager field on the User record to specify the individual that each user reports to. Manager notifications will **not** be sent if there is no user specified or the user specified as the manager is no longer set as an active user in Salesforce.

> Professional Edition only: Since the Manager field is not available on the User Page Layout in the Professional Edition, this option should not be selected.

- **Role Hierarchy** – Select this option if your organization uses the Salesforce Role Hierarchy feature to specify the reporting structure within Salesforce. Manager notifications will be sent to all active users with the Role that is one level above the opportunity owner's role in the hierarchy. Salesforce limits the number of recipients on a single email message to 10, so it is possible (although not likely) that some managers will not receive the notification. Manager notifications will **not** be sent if there is no Role specified for the opportunity owner or there are no active users assigned to the Role that is one level above the opportunity owner.

Also Notify

The value designates the email address of an individual or group that should also be sent the email notifications. This setting is optional and can be left blank.

If your organization would like to send the email notification to several additional people, you should create a group email address and designate that address in the **Also Notify** setting. Since all email messages are sent from the Salesforce.com servers which are external to your organization, you must make sure your group email address is accessible from outside your organization. A common configuration error is to use an email distribution list that is only valid when used from within your company's email system.

Sender Name

The value designates the name that should appear as the sender of all email notifications. If you would like the emails to be sent on behalf of the associated opportunity owner, leave this setting blank. However, keep in mind that it may cause some confusion, especially when users receive email messages that appear to be from themselves. To avoid this situation, enter a value such as "Opportunity Monitor" in this field.

Reply To Address

The value designates the email address to be used when a user replies to a notification message. If you would like the associated opportunity owner to receive the reply, leave this setting blank.

Alert Message Subject

The value designates the subject line to be used for all Status Alert messages. This setting is required and cannot be left blank. The following runtime replaceable tokens are supported:

Token	Meaning
{!NAME}	Name of the opportunity
{!AMOUNT}	Value from the opportunity Amount field

INSITU SOFTWARE

{!ACCOUNT}	Name of the opportunity's associated Account
{!OWNER}	Name of the opportunity owner
{!PROBABILITY}	Value from the opportunity Probability field
{!STAGENAME}	Value from the opportunity Stage field
{!EXPECTEDREVENUE}	Value from the opportunity Expected Revenue field
{!CLOSEDATE}	Value from the opportunity Close Date field

Alert Message Body

The template to be used to generate the body of the email notifications. This setting applies to both **Status Alert** and **Open / Close Alert** notifications. Special Note: there is both an HTML and Text version of the message body. If you make changes to one of the formats you should make the equivalent change to the other.

In addition to the same set of runtime tokens supported for the message subject, the message body also supports the following tokens:

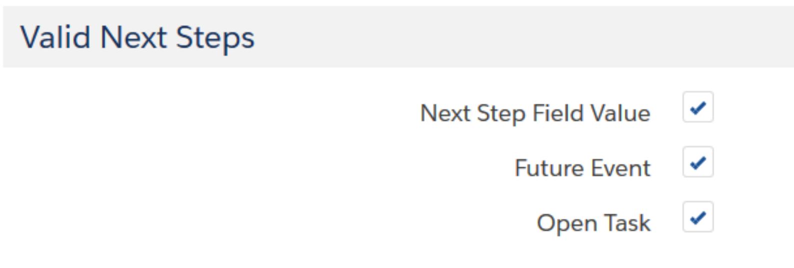
Token	**Meaning**
{!ALERTDETAILS}	A list containing the description of each new status alert
{!ID}	Salesforce.com unique ID of the opportunity
{!SFDCURL}	URL to your organization's instance of Salesforce.com.

In addition to the aforementioned "special" tokens, the iTools message template supports tokens for any Opportunity field. The syntax of an iTools merge field consists of an open curly brace and exclamation point, followed by the field API Name and a closing curly brace: {!Description}. All standard fields are supported as well as any custom Opportunity field your organization has defined.

If you are using a token for a custom field, remember that the API Name of all custom fields end with underscore, underscore, c (e.g. `{!Service_Region__c}`).

Valid Next Steps

The Valid Next Steps section applies specifically to the **Next Step** status check. If your organization intends to enable the **Next Step** status check, then you must indicate what opportunity condition(s) represents a 'next step' for an open opportunity. For more information regarding the **Next Step** status check, see the *Status Check Settings* section in this guide.



Next Step Field Value

Check this option to indicate that a value in the Next Step field on the opportunity is considered a 'next step'.

Future Event

Check this option to indicate that a future Event associated with the opportunity is considered a 'next step'.

Open Task

Check this option to indicate that a Task whose status is open and is associated with the opportunity is considered a 'next step'. The iTools Opportunity Status Monitor considers an open status to be any Task status value that has not been designated as a 'closed' status.

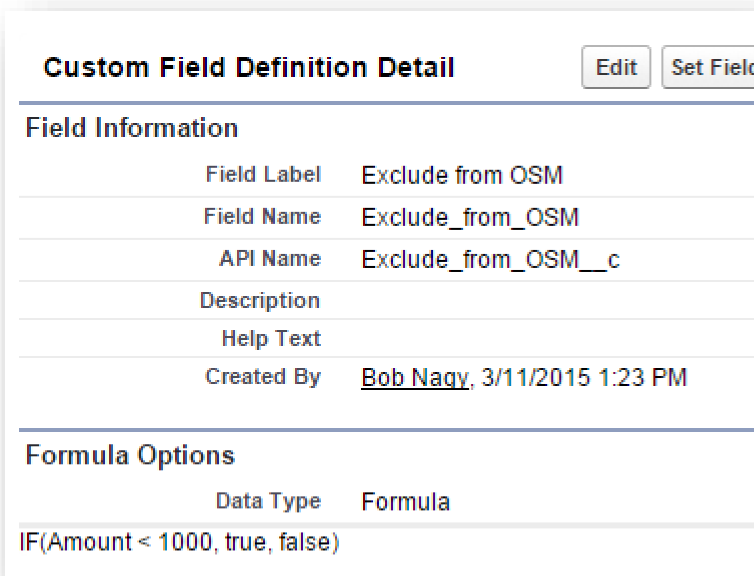
Indicator Fields

Indicator Fields section contains settings which identify custom fields you set up to refine the behavior of the Opportunity Status Monitor.

Exclude Opportunity

If you would like the Opportunity Status Monitor to not process certain open opportunities owned by users associated with this OSM Profile you must create an Opportunity custom formula field of type Checkbox and define the formula so that the checkbox is checked (value = true) when the Opportunity should be excluded. After defining the custom field and testing to make sure it behaves properly, select that field in the dropdown list associated with this setting.

For example, if do not want the iTools Opportunity Status Monitor to process deals worth less than $1,000 you would create a custom formula field such as:



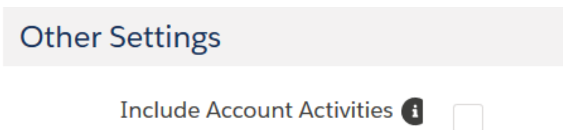
Then select the **Exclude from OSM** field in the settings dropdown.

Valid Activity

If you do not want all Activities associated with the Opportunity or Account to "count" as activity associated with the Opportunity, you must create an Activity custom formula field of type Checkbox and define the formula so that the checkbox is checked (value = true) when the Activity should count with respect to meeting the status check.

Other Settings

The last section, Other Settings, applies to those settings which do not fit into any of the other profile setting categories.



Include Account Activities

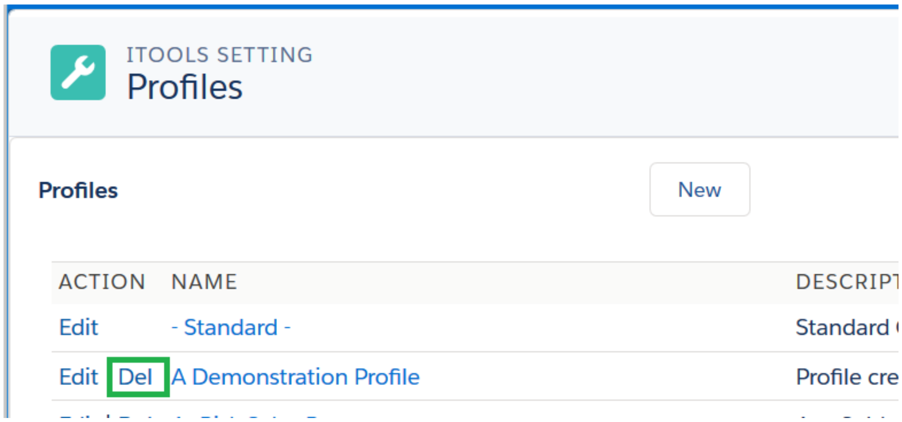
Check this option to indicate that an activity associated with an Opportunity's Account should count the same as an activity associated directly with the Opportunity. This option is designed for organizations/teams that only ever have a single open opportunity per account and are not good about setting the Related To field on activities to a specific Opportunity.

When checked, Account activities will be included in the Recent Activity, Next Step, and Task Due Date status checks.

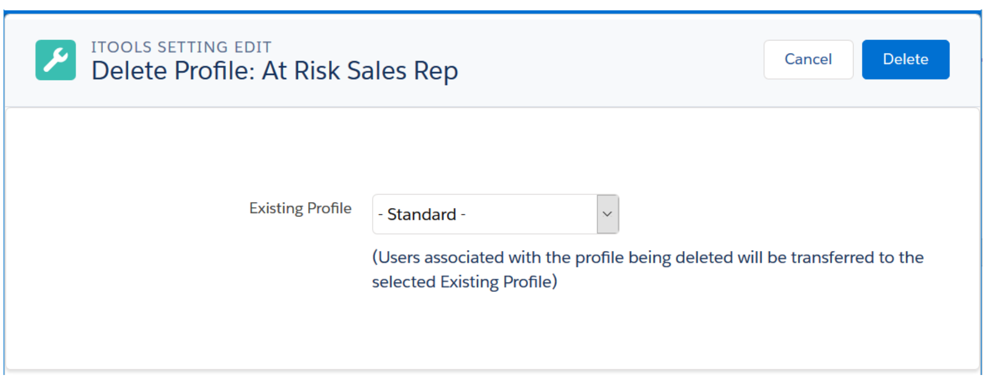
Delete a Profile

All OSM Profiles except the – Standard – profile can be deleted. If you no longer need an OSM Profile and want to delete it, follow these simple steps:

1. Select the **Profiles** setting from the iTools Settings. Then, click the **Del** link next to the OSM Profile Name.



2. Select an existing profile to set as the OSM profile for all users currently associated to the profile being deleted.

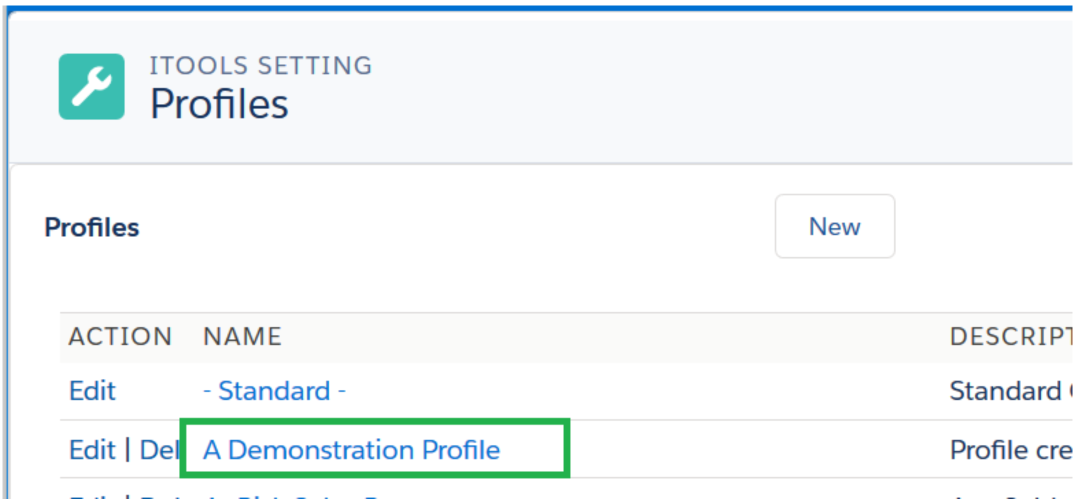


3. Click **Delete** to confirm the deletion.

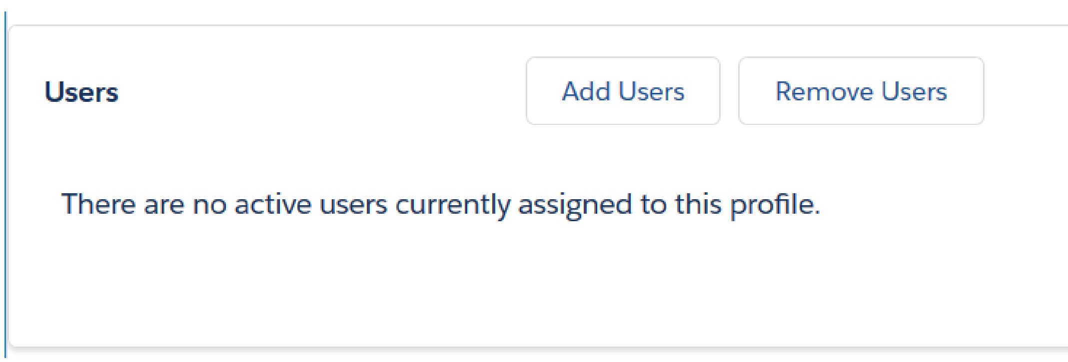
Manage Profile Users

For the iTools Opportunity Status Monitor to properly complete a Status Check for an opportunity, the owner of that opportunity must be associated with an OSM Profile. This is because the OSM Profile contains the criteria, scores and actions that are needed by iTools to perform the Status Check. To add or remove users from an OSM Profile, follow these steps:

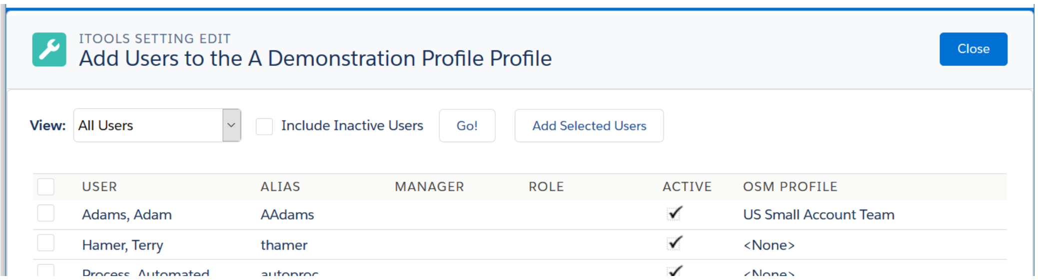
1. Select the Profiles setting from the iTools Settings. Then, click the Name of the OSM Profile.



2. The Users section of the detail page will indicate the number of users associated with the current profile. It will also indicate if the profile has been designated as the **Default Profile**. To add users to the profile, click the **Add Users** button.



3. The Add Users to Profile page contains a list of active users in your organization for you to select.



If you have more than 25 users in your organization, they will not all appear in the list and you may need to scroll through the list to find and select all the users you want to add.

For your convenience, you can filter the list of active users by selecting one of the filter options in the **View** dropdown list. You may be required to enter additional criteria such as user name or role. Click the **Go** button to fill the list with users that meet your criteria. Note: all users who meet the criteria will be included in the list regardless of whether they are currently associated with an OSM Profile. For those users who are already associated with the current profile, the checkbox in the first column will be disabled.

For each user you want to add to the current OSM Profile, check the checkbox in the first column next to their name. Then, click the **Add Selected Users** button and wait for the page to refresh.

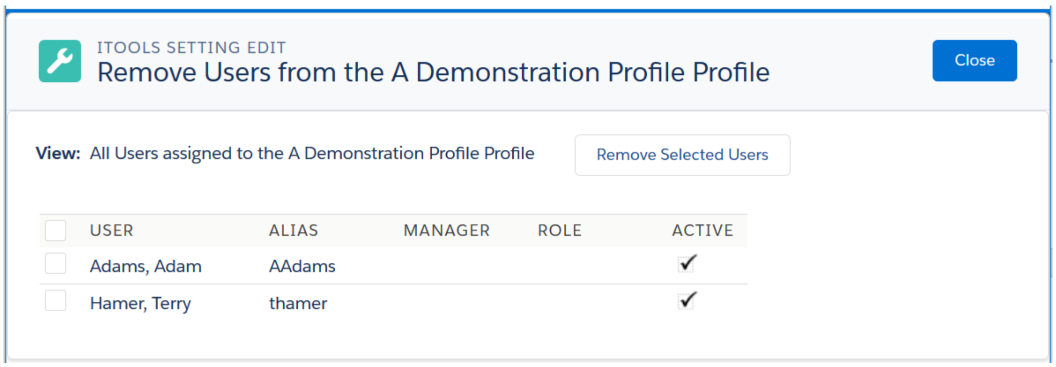
You must click the **Add Selected Users** button before using the **Next** / **Previous** page links or changing the **View** filter. Otherwise, your selections will be lost and the users will ***not*** be added to the current OSM Profile.

You can continue to change the list of users and add additional users to the profile without leaving the Add Users to Profile page. When you have finished, click the **Close** button and you will be returned to the OSM Profile Detail page.

You can use the Add Users to Profile page to find out which profile an individual user is currently assigned. Simply access the Add Users page on any OSM Profile, select the Individual User option in the **View** dropdown, and enter (or lookup) the user of interest in the user field next to the dropdown list, and click on **Go**. The user will be displayed in the list of users and their existing profile will be displayed in the OSM Profile column.

You can use this same technique to identify all users that are not yet assigned to an OSM Profile. These users will have a value of <None> in the OSM Profile column.

4. To remove users from the profile, click the **Remove Users** button. The Remove Users from Profile page contains a list of all users currently associated with the OSM Profile.



For each user you want to remove from the current OSM Profile, check the checkbox in the first column next to their name. Then, click the **Remove Selected Users** button and wait for the page to refresh. Users who are removed from a profile will not be associated with any OSM Profile unless you have designated a Default Profile.

If there are more than 25 users associated with the current OSM Profile, you must click the **Remove Selected Users** button before using the **Next** / **Previous** page links. Otherwise, your selections will be lost and the users will ***not*** be removed from the current OSM Profile.

Status Check Settings

For each opportunity, the iTools OSM Status Check evaluates as many as 9 different conditions to determine the status of the opportunity. Each of these conditions has additional attributes which determine if and how the conditions are evaluated and what actions the iTool should take when the condition fails. It is this combination of status check conditions and attributes that allow you to custom tailor the iTools Opportunity Status Monitor to fit the critical needs of your sales process and management objectives.

Status Check Conditions

1. **Length in Stage** – Checks the length of time (in days) the opportunity has been in its current stage against the maximum number permitted. If the opportunity has been in the stage longer than the maximum number of days permitted, then the check will fail.
2. **Recent Activity** – Checks the length of time (in days) that have passed since an Activity (Task or Event) has been added to the opportunity. If no activity has been recorded for that opportunity within the maximum number of days specified, then the check will fail.
3. **Next Step** – Checks whether or not a qualifying next step has been specified for the opportunity. If the opportunity does not have a qualifying next step specified, then the check will fail. See the *OSM Profiles* section for additional information on Valid Next Steps and how to designate which ones should be used for this Status Check condition.
4. **Probability Value** – Checks the value in the opportunity Probability field to determine if it lies within the permitted range for the stage. If the probability is outside the range permitted, then the check will fail. For this condition, the range is specified by indicating the number of percentage points above or below the default value.
5. **Task Due Date** – Checks to see if the opportunity has any overdue Tasks. For this condition, the number of days 'past due' is specified as the setting value. If the opportunity has any tasks that remain open past the specified due date (Due Date + days past due), then the check will fail.
6. **Amount Decrease** – Checks the value in the opportunity Amount field for a decrease in value to make sure the decrease is within the permitted range. For this condition, the permitted maximum number the value can decrease is specified as the setting value. If, from the last time the status check was performed, the Amount value decreases by a number larger than the permitted maximum value, then the check will fail.
7. **Probability Decrease** – Checks the value in the opportunity Probability field for a decrease in value to make sure the decrease is within the permitted range. For

this condition, the permitted maximum number of percentage points the value can decrease is specified as the setting value. If, from the last time the status check was performed, the Probability value decreases by a number larger than the permitted maximum value, then the check will fail.

8. **Close Date Increase** – Checks the value in the opportunity Close Date field for an increase in value to make sure the increase is within the permitted range. For this condition, the permitted maximum number of days the value can increase is specified as the setting value. If, from the last time the status check was performed, the Close Date value increases (in days) by a number larger than the permitted maximum value, then the check will fail.
9. **Past Close Date** – Checks to see if the opportunity remains open beyond the permitted number of days past its Close date. For this condition, the number of permitted days 'past due' is specified as the setting value. If the opportunity remains open past the permitted number of days (Close Date + days overdue), then the check will fail.

Status Check Attributes

Each of the 9 conditions described above, can be configured using the following 7 attributes:

- **Stage** – For ultimate flexibility, each status check can be configured on a 'per stage' basis, meaning that a different set of criteria and actions can be used based on the current stage of the opportunity. This allows you to turn on/off the status check or dial up/down the conditions according to their relative importance within a particular stage.

  For example, you may not want to enable the 'Recent Activity' check until the opportunity reaches a stage indicating that it has been 'fully qualified.' Then, during the next stage, you may require that at least one activity is recorded every 2 weeks, but may not necessarily want to send any email alerts if the check fails. But, once the opportunity reaches a latter and seemingly more critical stage, you may want a status alert message sent if only a few days pass without a recorded activity.

The **Length in Stage** condition is the only condition that must be configured for each stage. For all other conditions, you have the option to configure the same attribute settings for all stages or to configure on a 'per stage' basis. If you plan to configure the settings on a 'per stage' basis, then it is **strongly** recommended that you finalize your Salesforce opportunity stage configuration before configuring the iTools OSM Status Check Settings.

- **Active** – Indicates whether or not the status condition should be checked. If you want the status condition to be checked or want it checked when the opportunity is in a particular stage, then check the Active checkbox. Otherwise, uncheck the checkbox.
- **Send Email Alert** – Indicates whether or not a Status Alert email notification should be sent if the status check fails. If more than one condition fails during a status check, only one message will be sent; the body of the message will list out each condition that failed when the status check was run. If you want an email alert sent, then check the Send Email Alert checkbox. Otherwise, uncheck the checkbox.
- **Post Chatter Alert** - Indicates whether or not a Chatter Alert message should be posted to the opportunity if the status check fails. If more than one condition fails during the status check, only one Chatter Alert message will be posted; the body of the post will list out each condition that failed when the status check was run. You must have the Salesforce Chatter feature enabled in order for this setting to be used. If you want a Chatter Alert message posted, then check the Post Chatter Alert checkbox. Otherwise, uncheck the checkbox.
- **Setting Value** – Specifies the conditional value to be used during the status check. Eight out of the nine conditions have a specific value that is used to determine if the individual check has succeeded or failed. For the **Length in Stage** condition, the setting value specifies the permitted *Number of Days* that an opportunity can remain in the stage. While a generalized 'Setting Value' label is used in the Status Check Settings list view, a more specific label is used on the Edit page for each individual status condition to better describe its purpose.
- **Status Alert Score** – Designates the alert score value given to the Status Alert that is generated when the status condition fails. The larger the numeric value, the greater the risk that the opportunity will be lost due to the failure to meet the specific condition check. The summarization of alert score values from individual Status Alerts currently associated with the opportunity is called the Total Alert Score. The Total Alert Score is used to define status values, identify opportunities at greatest risk and more. For additional information, see the Total Alert Score description in the *Configuring Status Checks* section of this guide.

- **Alert Text** – A short phrase or sentence used in email notifications, Chatter posts and on-screen to describe a failed condition. For example, "There has been no activity for {!SETTINGVALUE} days".

The **Alert Text** field supports two special "tokens" whose values are substituted when the status alert is generated. Use of these tokens makes it easier to update status check conditions while maintaining specific alert messages.

To dynamically substitute the Setting Value in the Alert Text, use the token **{!SETTINGVALUE}**

To dynamically substitute the Stage Name in the Alert Text, use the token **{!STAGENAME}**

For example, if the Length in Stage status check for the Negotiation stage was set at 30 days, an Alert Text of "The Opportunity has been in the {!STAGENAME} stage for more than {!SETTINGVALUE} days." would result in a Status Alert message of "The Opportunity has been in the Negotiation stage for more than 30 days".

Edit Status Check Conditions

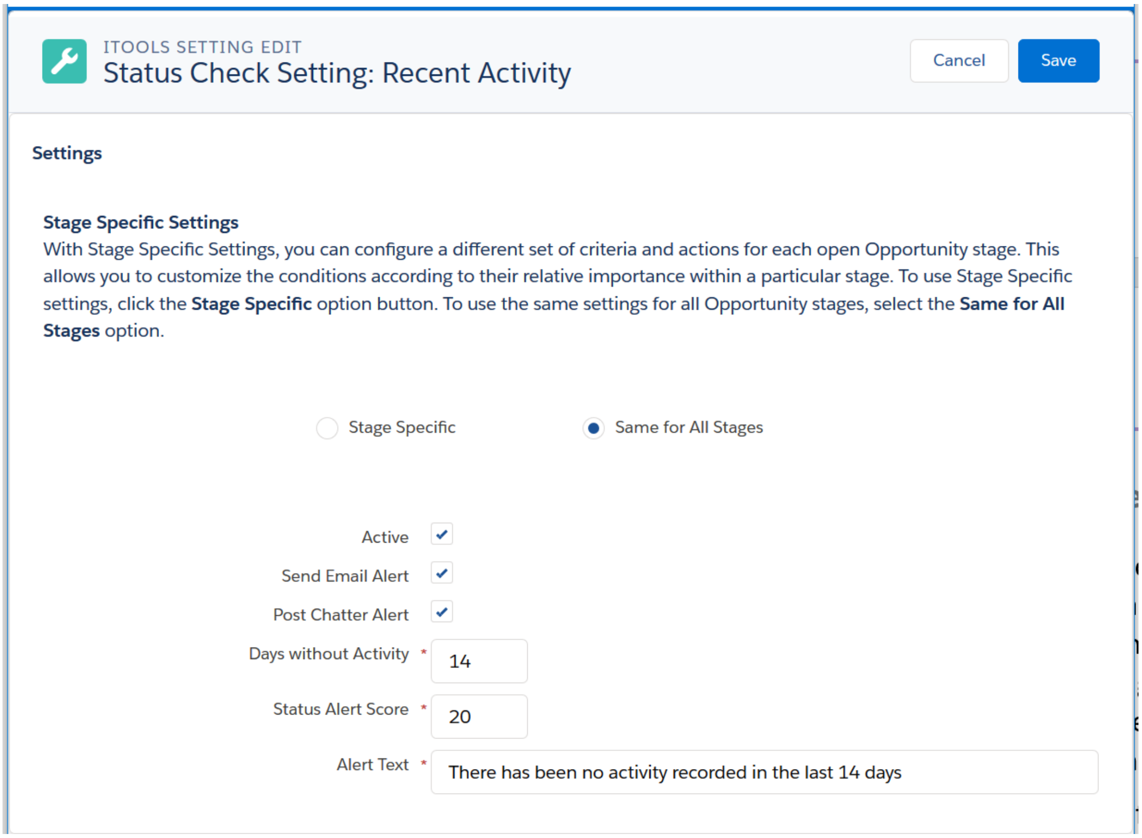
To edit the individual Status Check Settings associated with an OSM Profile, follow these steps:

1. Select the **Profiles** setting from the iTools Settings. Then, click the Name of the OSM Profile. The current setting values are displayed in the Status Check Settings section of the page.

Status Check Settings

ACTION	STATUS CHECK	ACTIVE	EMAIL ALERT	CHATTER POS	SETTING VALU	ALERT SCORE	ALERT TEXT
Edit	Length in Stage						
	Prospecting	✓	✓	✓	30	20	The Opportur
	Qualification	✓	✓	✓	30	20	The Opportur
	Needs Analysis	✓	✓	✓	30	20	The Opportur
	Value Proposition	✓	✓	✓	30	20	The Opportur
	Id. Decision Makers	✓	✓	✓	30	20	The Opportur
	Perception Analysis	✓	✓	✓	30	20	The Opportur
	Proposal/Price Quote	✓	✓	✓	30	20	The Opportur
	Negotiation/Review	✓	✓	✓	30	20	The Opportur
Edit	Recent Activity (All Stages)	✓	✓	✓	14	20	There has bee
Edit	Next Step (All Stages)	✓	✓	✓		20	There is no N
Edit	Probability Value (All Stages)	✓	✓	✓	20	20	The Probabili
Edit	Task Due Date (All Stages)	✓	✓	✓	5	20	A Task is mor
Edit	Amount Decrease (All Stages)	✓	✓	✓	5000	20	Amount signi
Edit	Probability Decrease (All Stages)	✓	✓	✓	20	20	Probability sig
Edit	Close Date Increase (All Stages)	✓	✓	✓	30	20	Close Date sig
Edit	Past Close Date (All Stages)	✓	✓	✓	30	20	30 Days past

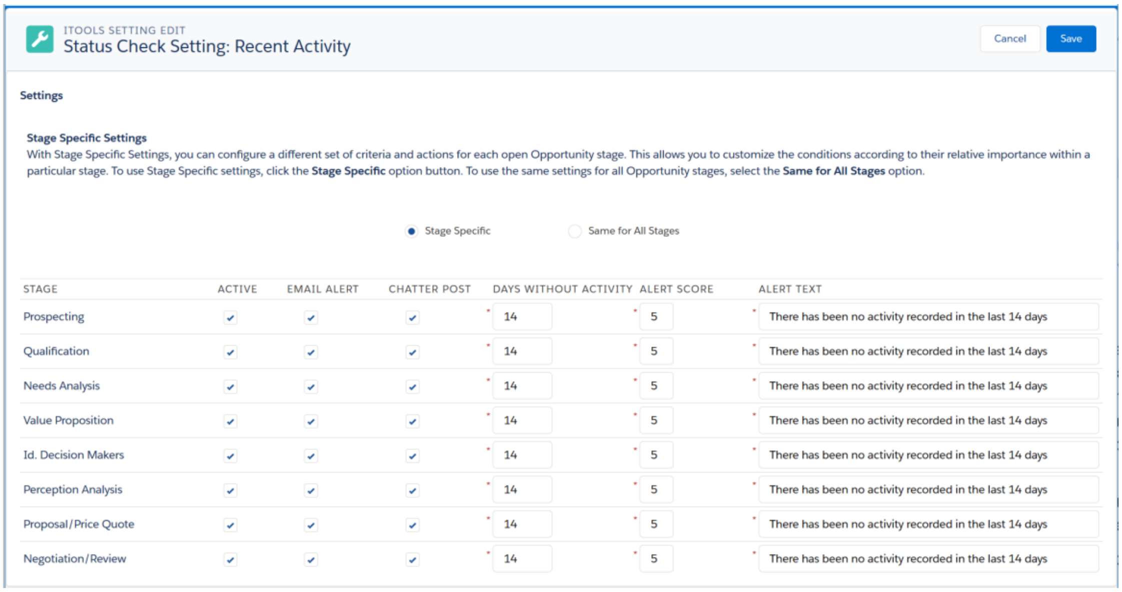
2. Click on the **Edit** link next to the Status Check condition to edit its attributes. The Status Check Setting Edit page will vary depending on the individual Status Check, whether the check is configured to be Stage Specific or the same for All Stages, and the opportunity stage values you have defined for your organization.



3. As noted above, each status check can be configured on a 'per stage' basis, meaning that a different set of criteria and actions can be used based on the current stage of the opportunity. This allows you to turn on/off the status check or dial up/down the conditions according to their relative importance within a particular stage. To configure the setting on a 'per stage' basis, click the **Stage Specific** option button at the top of the page.

> Since, the **Length in Stage** condition is the only condition that **must** be configured for each stage, the option will automatically be set to 'Stage Specific' and the Stage Specific Settings section will not be displayed on its Edit page.

4. When the **Stage Specific** option button is selected, the bottom section will display the Status Check Attributes in a list which lets you conveniently update any attribute for any stage. The number and names of the stages will vary based on your Salesforce configuration.



ITOOLS SETTING EDIT

Status Check Setting: Recent Activity

Cancel Save

Settings

Stage Specific Settings

With Stage Specific Settings, you can configure a different set of criteria and actions for each open Opportunity stage. This allows you to customize the conditions according to their relative importance within a particular stage. To use Stage Specific settings, click the **Stage Specific** option button. To use the same settings for all Opportunity stages, select the **Same for All Stages** option.

Stage Specific   Same for All Stages

STAGE	ACTIVE	EMAIL ALERT	CHATTER POST	DAYS WITHOUT ACTIVITY	ALERT SCORE	ALERT TEXT
Prospecting	✓	✓	✓	14	5	There has been no activity recorded in the last 14 days
Qualification	✓	✓	✓	14	5	There has been no activity recorded in the last 14 days
Needs Analysis	✓	✓	✓	14	5	There has been no activity recorded in the last 14 days
Value Proposition	✓	✓	✓	14	5	There has been no activity recorded in the last 14 days
Id. Decision Makers	✓	✓	✓	14	5	There has been no activity recorded in the last 14 days
Perception Analysis	✓	✓	✓	14	5	There has been no activity recorded in the last 14 days
Proposal/Price Quote	✓	✓	✓	14	5	There has been no activity recorded in the last 14 days
Negotiation/Review	✓	✓	✓	14	5	There has been no activity recorded in the last 14 days

If additional opportunity stages are created after the OSM Profiles have been defined, you must make sure to review the Status Check Settings that are marked as 'Stage Specific' since they will default to **not** Active and will not be displayed in the list of Status Check Settings on the OSM Profile View page. To activate the Status Check for the newly added stage you must go to each OSM Profile and edit each stage specific status check.

Required Field Settings

In addition to the nine status checks, the iTools Opportunity Status Monitor can check for required field values when the opportunity is in a particular stage. In the Required Fields section of the OSM Profile, you select the list of opportunity fields that require a value and the stage in the process by which it must be provided. While it is possible to use Salesforce validation rules and page layouts to designate opportunity fields as required, the iTools Required Field Settings feature has several key advantages including:

- **Stage Specific Configuration** - Each Required Field Setting specifies the opportunity stage at which the field is required. This gives you the flexibility to match the 'required-ness' of a field with the stage at which the information is necessary, known and/or most accurate.
- **Increased Accuracy** – If a field is required, but the value is unknown or not available, then the user will commonly guess and enter inaccurate information just so the opportunity can be saved. With OSM Required Fields, the data entry process is not interrupted when a value in a required field is missing. Instead, a more effective notification approach is used which increases the likelihood that more accurate values are obtained and entered into the system.
- **Incorporated into the Status Alert process** – Each required field check is processed at the same time and in the same manner as the other opportunity status checks. Similarly, you can configure each required field with a different Alert Score and Alert Text. Required fields with missing information will generate Status Alerts, contribute to the overall Total Alert Score value and its alert text will appear in the visual display of the Opportunity Status.
- **Different Requirements for Different Teams/Users** – Not all opportunity data is necessary or known at the same stage in the sales process by every team. By combining OSM Profiles and OSM Required Fields, you can easily create required field settings that are specific to the needs of each team or individual.
- **Quick and Easy Setup** – No programming skills or formula wizardry is required to create and configure an OSM Required Field. Using simple point and click actions, your required fields can be set up in a matter of minutes.

Key Benefits and Additional Configuration Options

The key benefit of using OSM Required Fields is to make sure that data critical to a successful sale is identified in a timely manner. They can also be used to ensure that key milestones in the sales process are achieved on a timely basis. To set up the system to track and monitor key milestones, you can do the following:

1. Create a custom opportunity checkbox field for each key milestone or critical task in your sales process.

2. Configure OSM Required Fields to monitor each of the milestone checkbox fields. The **Stage Required** attribute can be used to designate the stage in which each milestone or task should be completed. You can also set the Alert Score value to indicate how critical each individual task/milestone is if not completed in time.
3. Instruct the members of your sales team to simply “check off” the appropriate checkbox as each milestone is reached or critical task completed.

Finally, you can use OSM Required Fields simply as a means of encouraging users to provide more complete opportunity data without preventing opportunity creation or even impacting opportunity status. By assigning an Alert Score of 0 to a Required Field, you can leverage the Opportunity Status Monitor to encourage more complete data collection without impacting the overall Total Alert Score for open opportunities.

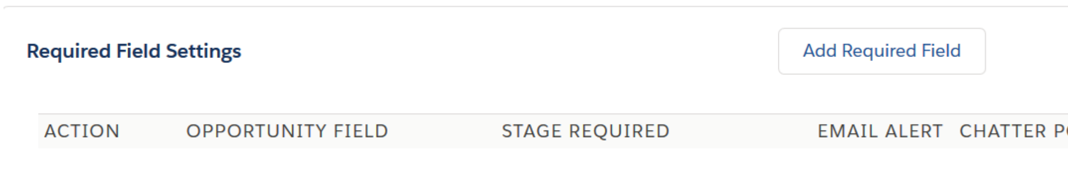
Create Your Own Status Check

Using the OSM Required Field mechanism in conjunction with custom formula fields you can create your own status checks for the status monitor. For example, say your sales process calls for the Opportunity product(s) to be identified by the time the opportunity gets to the Needs Analysis stage. You would first create a custom rollup summary field that counts the number of Opportunity Product records associated with the opportunity. Then create a custom formula checkbox field that is checked when the product count rollup field is greater than 0. Finally, add an OSM Required Field check on the checkbox formula field. This check will test that the field is checked (set to true) by the time the opportunity reaches the Needs Analysis stage otherwise a status alert will be generated. The types of checks that can be added using this approach is nearly endless and with a little creativity you should be able to monitor all aspects of your sales process.

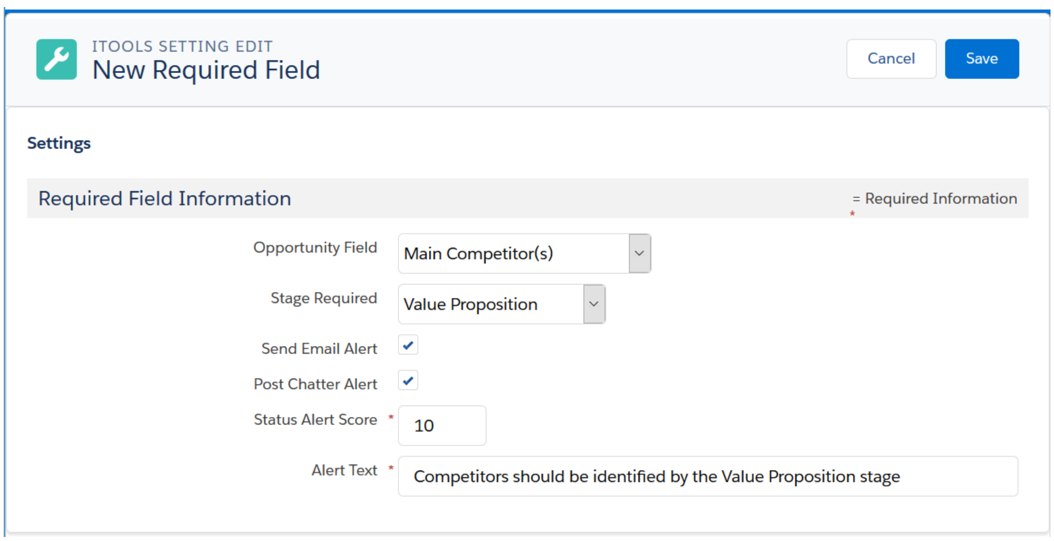
Add OSM Required Field

To add an OSM Required Field to an OSM Profile, follow these simple steps:

1. Select the **Profiles** setting from the iTools Settings. Then, click the Name of the OSM Profile.
2. Scroll down to the Required Field Settings section of the page and click the **Add Required Field** button.



3. In the New Required Field page, enter the appropriate information for each field.



- **Opportunity Field** – Select the opportunity field that will be required.

> If the required opportunity field is a Checkbox, the Opportunity Status Monitor will validate that the field is Checked.

- **Stage Required** – select the opportunity stage at which a value for the field must be provided. For any stage prior to the one chosen, the opportunity field will be treated as optional.

- **Send Email Alert** – Indicates whether or not a Status Alert email notification should be sent when the opportunity reaches the Stage Required stage and the opportunity field is blank. If more than one required field is missing when the check is performed, only one message will be sent; the body of the message will list out each field whose value is missing. If you want an email alert sent, then check the Send Email Alert checkbox. Otherwise, uncheck the checkbox.
- **Post Chatter Alert** - Indicates whether or not a Chatter Alert message should be posted to the opportunity when the opportunity reaches the Stage Required stage and the opportunity field is blank. If more than one required field is missing when the check is performed, only one Chatter Alert message will be posted; the body of the post will list out each field whose value is missing. You must have the Salesforce Chatter feature enabled in order for this setting to be used. If you want a Chatter Alert message posted, then check the Post Chatter Alert checkbox. Otherwise, uncheck the checkbox.
- **Status Alert Score** – Designates the alert score value given to the Status Alert that is generated if a value for the field is not provided by the required stage. The larger the numeric value, the greater the importance placed on the required field. The summarization of alert score values from individual Status Alerts currently associated with the opportunity is called the Total Alert Score. The Total Alert Score is used to define status levels, identify opportunities at greatest risk and more. For additional information, see the Total Alert Score description in the *Configuring Status Checks* section of this guide.
- **Alert Text** – A short phrase or sentence used in email notifications, Chatter posts and on-screen to describe the required field condition. For example, “Main Competitors should be identified by the Value Proposition stage”.

4. Click the **Save** button to add the new required field and return to the OSM Profile View page.

Open / Close Alert Settings

The lifetime of an opportunity begins when an opportunity is created and ends when its status is marked as closed. iTools Opportunity Status Monitor deems these two events as extremely critical to a successful sales process and therefore provides notification support for them in the OSM Profile.

The Opportunity Status Monitor supports three different Open / Close Alerts:

- New Opportunity Alert – created when a new opportunity is added.
- Won Opportunity Alert – created when an opportunity is closed with a 'won' status.
- Lost Opportunity Alert – created when an opportunity is closed with a 'lost' status.

All three alerts support the same set of configuration options which are similar in nature to the Status Alert and Required Fields settings. In addition, a value amount can be specified so that alerts will only be created for those opportunities with a value equal to or greater than that amount.

Edit Open / Close Alert Settings

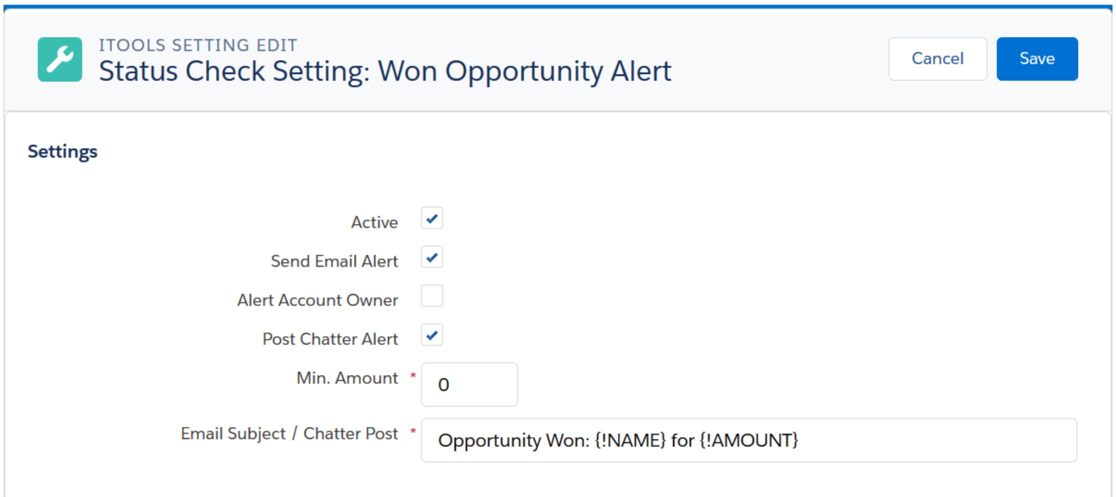
To configure an OSM Open / Close Alert Setting Field for an OSM Profile, follow these simple steps:

1. Select the **Profiles** setting from the iTools Settings. Then, click the Name of the OSM Profile.
2. Scroll down to the Open / Close Alert Settings section of the page. Click the **Edit** link next to the alert you want to configure.

Open / Close Alert Settings

ACTION	ALERT	ACTIVE	EMAIL ALERT	ALE
Edit	New Opportunity Alert	✓	✓	
Edit	Won Opportunity Alert	✓	✓	
Edit	Lost Opportunity Alert	✓	✓	

3. In the Edit Opportunity Alert page, enter the appropriate information for each field.



The Alert Settings support the following options:

- **Active** – Indicates whether or not iTools OSM should generate alerts for the specific Open / Close opportunity condition. If you want the condition monitored, then check the Active checkbox. Otherwise, uncheck the checkbox.
- **Send Email Alert** – Indicates whether or not an email notification should be sent when the Open / Close condition is met. Unlike Status Alert email notifications, the Open / Close Alert notifications are always sent to the opportunity owner's manager, not the opportunity owner. Please note that when a new opportunity is created, it is possible to receive two separate email notifications – a New Alert and a Status Check Alert. If you want an email alert sent, then check the Send Email Alert checkbox. Otherwise, uncheck the checkbox.
- **Alert Account Owner** – Indicates whether or not the owner of the Account associated with the opportunity should also receive the email alert notification. If you want an email alert to be sent to the account owner, then check the Send Email Alert checkbox. Otherwise, uncheck the checkbox.

  Please note that this option only applies when:

  - The opportunity is associated with an account and the account owner is ***not*** the same person as the opportunity owner.
  - The Send Email Alert checkbox is checked.
- **Post Chatter Alert** - Indicates whether or not a Chatter Alert message should be posted to the opportunity's associated Account record in Salesforce. You

must have the Salesforce Chatter feature enabled in order for this setting to be used. If you want a Chatter Alert message posted, then check the Post Chatter Alert checkbox. Otherwise, uncheck the checkbox.

- **Min. Amount** – Specifies the minimum value used to determine whether or not an alert (email notification or Chatter post) should be generated. If the opportunity's Amount field is equal to or greater than the specified minimum amount, then an alert will be generated. If the opportunity's Amount is less than the minimum amount, no alert is generated. If the Amount field for an opportunity is left blank, it will be treated as if the amount is zero.
- **Email Subject / Chatter Post** – A short phrase or sentence used as the Subject line in an email alert and within the body of a Chatter post. This field supports the same set of Tokens as the OSM General Settings **Alert Message Subject** option. A complete list of supported tokens in available in the *General Settings* sub-section of this guide.

To prevent the generation of a massive number of alerts for all existing closed opportunities when the Opportunity Status Check is run the first time, the Closed opportunity alerts will ***not*** be generated if the Opportunity Status Monitor did not process the opportunity at least once while it was open.

The process will, however, send New Opportunity notifications for all your existing open opportunities. If you do not want New Opportunity notifications sent for all existing open opportunities, then you should manually run one Opportunity Status Check with all notifications disabled. See the *Running the Opportunity Status Check* section of this guide for more details.

4. Click the **Save** button to save the updated values and return to the OSM Profile View page.

Opportunity Level OSM Profiles

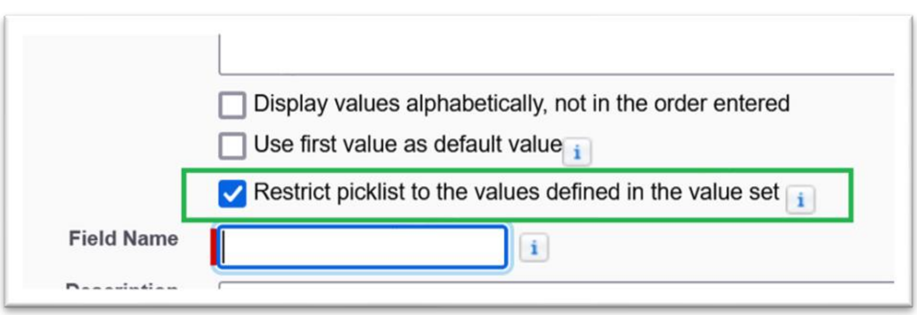
The OSM Profile used to evaluate an opportunity is normally determine by the OSM Profile associated with the opportunity's owner. However, there are times when the appropriate set of evaluation rules should be based not on who owns the opportunity but rather some characteristic of the opportunity itself such as the size of the prospective deal, the market the deal is in, or the strategic importance of the deal. If this is the case for your sales team, iTools Opportunity Status Monitor provides a mechanism for you to "override" the standard OSM Profile assignment and specify, in a field on the Opportunity record, which OSM Profile should be used when performing a Status Check on that opportunity.

Add an Opportunity Custom Field

The first step to enable the OSM Profile override is for you to define a custom field on the Opportunity object which will contain the name of the OSM Profile to be used when performing a status check. This new custom field must be able to contain a text string whose value exactly matches the name of an OSM Profile. There are currently three possible fields types you can define:

Text Field
A Text custom field can be used if the value of this field is set via a custom Apex trigger, workflow, or process builder flow. Since the value in the field, if set, must match the name of an OSM Profile exactly having users enter values in this field has a high probability of error. It is generally recommended that you NOT use a simple Text custom field.

Picklist Field
Values in a Picklist custom field are stored in the Salesforce.com database as text and as such can be used as the OSM Profile Override field. When defining a Picklist custom field for the OSM Profile override be sure to mark the field as being Restricted to the values defined:



Picklist fields are recommended when you will have users selected the OSM Profile or when you have some automation process such as an Apec trigger, workflow, or Process Builder flow setting the field.

Formula Field

In many cases the OSM Profile to be used on an opportunity can simply be defined in a formula field of type Text. The formula sets the value to an OSM Profile name based on some other characteristic of the Opportunity record such as the Amount, Market, or even a simple checkbox field exposed to users for indicating the opportunity requires special monitoring.

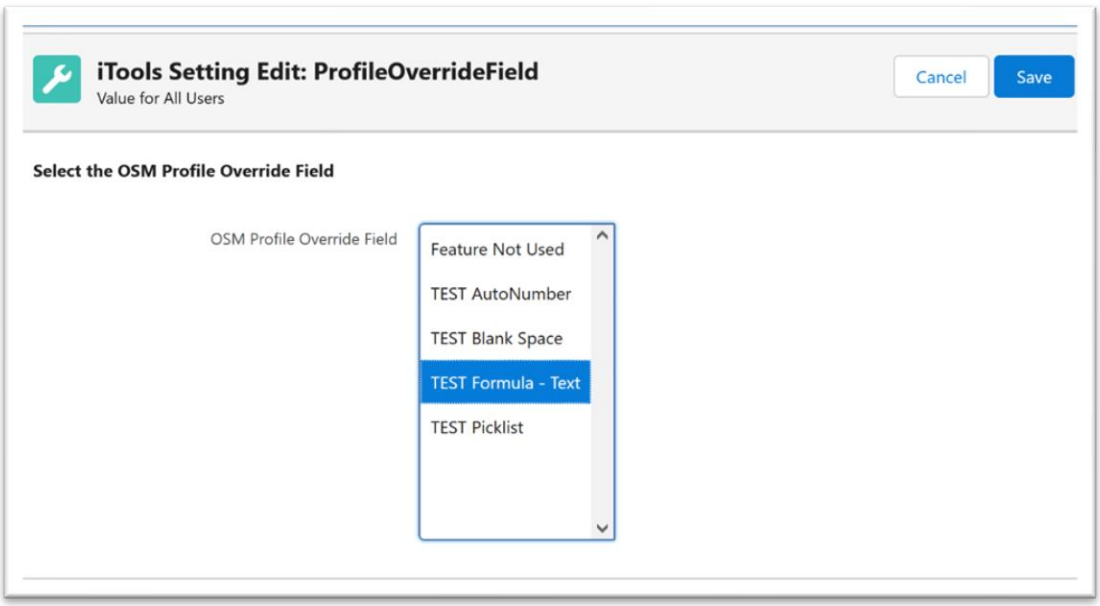
When setting up the OSM Profile Override custom field on your Opportunity object keep the following in mind:

- The Field Label and Field Name attribute of the custom field do not matter to iTools. In the next step of the process you will tell iTools which field you defined.
- The field does NOT have to be on the page layout of the Opportunity unless you want users selecting the OSM Profile rather then setting it by rule / automation.
- You users will need READ access to the field IF you allow them to initiate an Opportunity Status Check of their opportunities from the Opportunity detail page.
- If the field can be specified by a user, say for example a sales manager, those users will obviously have to have edit access to the field.
- The field does NOT have to contain a value on every opportunity, only those that should be using an OSM Profile different than the one associated with the Opportunity's owner.
- If you ever change the Name of an existing OSM Profile or add new profiles that could be used in an override situation, the field's possible values (in the case of a Picklist) and/or the automation process that sets the field may need to be updated.

Activate the Feature

Once you have created your OSM Profile Override custom field on the Opportunity object you must tell iTools which field you are using by setting the **ProfileOverrideField** iTools Setting. Follow these simple steps to specify the override field and activate the feature.

1. Access the **ProfileOverrideField** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click on the **Edit** button.
3. Select the custom field you defined for overriding the OSM Profile. Click the **Save** button to save your changes. The feature is now enabled.



Determining which OSM Prole is Used

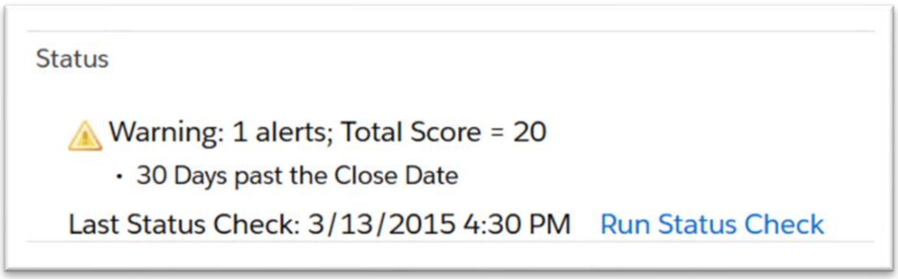
When the iTools Opportunity Status Monitor's Status Check process evaluates an opportunity the following logic is used to determine which OSM Profile is used in the evaluation:

1) The process looks at the value of the **ProfileOverrideField** iTools Setting to see if an override field is defined.
   a) If the iTools Setting is set to "Feature Not Used" the check moves to #2 below to look for an owner association.
   b) If a field is defined the check looks to see if the field still exists on the Opportunity object and if that field contains a value.
      i) If the field no longer exists or contains no value, the check moves to #2 below to look for an owner association.
      ii) If a value is specified, the check looks to see if the value matches the Name of an existing OSM Profile.
         (1) If no OSM Profile is found with the same Name as the value in the custom field the check moves to #2 below to look for an owner association.
         (2) If a matching OSM Profile is found, that profile is used in the evaluation of the opportunity.
2) The process looks to see if the owner of the opportunity has been associated with an OSM Profile.
   a) If no association between the user and an OSM Profile is found the check moves to #3 below to look for a default association.
   b) If the user is associated with an OSM Profile that profile is used in the evaluation of the opportunity.
3) The process looks at the value of the **DefaultProfile** iTools Setting to see if a default OSM Profile is defined.
   a) If a default profile is not specified or no longer exists no Status Check is performed.
   b) If a valid OSM Profile is specified as a default profile that profile is used in the evaluation of the opportunity.

Display Opportunity Status

The iTools Opportunity Status Monitor includes a custom control that you can add to your Opportunity detail page to succinctly communicate the status of the opportunity. Using the data generated by the Opportunity Status Monitor's Status Check process, the control uses a limited amount of space to communicate:

- Last time the status was checked for the opportunity
- Link to run an on-demand status check (optional)



Customizing the Opportunity Display Status

The display of the custom status control can be customized for each of the seven opportunity status values: New, Private, Normal, Warning, Alert, Closed Won, and Closed Lost. Using the appropriate iTools Settings you can change the following items:

- The status label which is used as the tooltip for the status value icon.
- The short, descriptive text associated with a status and displayed as the first line of the custom control immediately following the icon. Token variables for number of status alerts and total status alert score are supported.
- The Icon used as the visual indicator for the Normal, Warning, and Alert statuses.
- The maximum Total Status Alert Score that defines the numeric range for the Normal, Warning, and Alert status.
- The text of the **Last Checked** label.
- The text of the **Run Status Check** label.
- Hide / Show option value which determines whether or not to display the **Run Status Check** link to opportunity owners.

Additional details regarding how to customize the contents of the custom status control are covered in the *Configuration Options* section of this guide.

Add the Custom Opportunity Status Control

To add the Opportunity Status Control to your opportunity page layout(s), complete the following steps:

1. Navigate to the Page Layout editor for the Task page

   Lightning:

   Setup > Objects and Fields > Object Manager >

   Click the **Opportunity** link in the list **> Page Layouts >**

   Click the icon in the last column of the layout to update **>**

   Edit

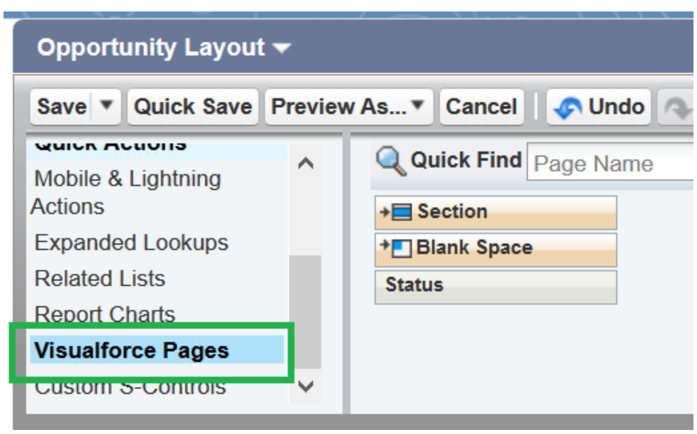
   Classic:

   Setup > Customize > Opportunities > Task Page Layouts >

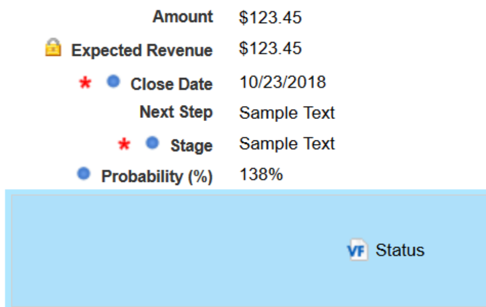
   Click on the **Edit** link next to the layout to update

If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Profession Edition supports only one page layout per object.

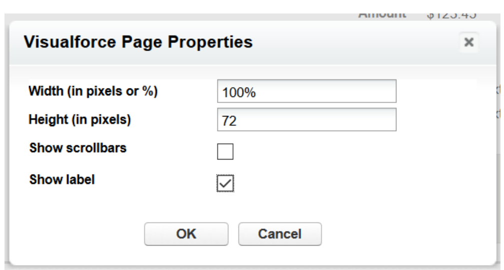
2. In the upper left area of the page, select the **Visualforce Pages** option.



3. Drag the **Status** page to the location on the Opportunity Page Layout that suits your layout best. The exact location does not impact the operation of the feature.



4. After placing the Status control on the layout, a couple of the properties must be updated. To access the control's Property page, double-click the Visualforce control or select the control and click on the configuration “wrench” icon in the upper right-hand corner.
5. In the Visualforce Page Properties popup window, make the following changes:
   - Set the **Height (in pixels)** to 72
   - Check the **Show Label** checkbox.



6. Click **OK** to save the changes.
7. Click the **Save** button at the top of the layout editor to save your changes.

If you have more than one Opportunity Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce.com, you will only have a single Opportunity Page Layout.

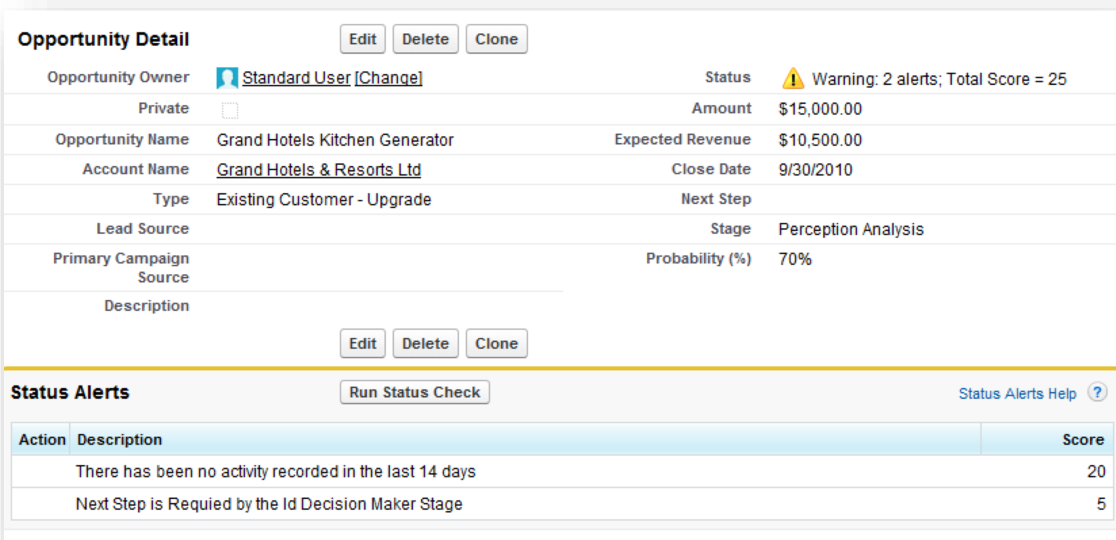
Alternate Display Option

The major benefit of the custom Opportunity Status control is that all information related to the status value and associated alerts are displayed together in a single location on the Opportunity Detail page. This eliminates the need to add the Status

Alerts Related List to the Opportunity Detail page since all the information that would be displayed in the Related List is already displayed in the Opportunity Status control.

If you would like to display the Status Alerts Related List on the Opportunity Detail page, you can eliminate the redundancy of information in the Opportunity Status control by configuring it as a single height control. The combination of a single height Opportunity Status control and the Status Alerts Related List is a nice alternate display option if your Opportunity Detail page contains only a few other related lists.

To configure this alternate display, follow the instructions above, however, in step 5, set the Height attribute in the Visualforce Page Properties popup window to 16. Then, be sure to add the Status Alerts Related List to your opportunity page layout and use its Property page to configure the columns in the list.



Add the Total Alert Score Field – Professional Edition

If your organization is using the Professional Edition of Salesforce.com, you will need to perform a few additional configuration steps for the Total Alert Score to be used in reports and dashboards. Even though the Total Alert Score is displayed in the custom status control, it is not available for reporting until it is explicitly added to the Opportunity detail page. Follow these simple steps to add the Total Alert Score to your Opportunity Page Layout.

1. Navigate to the Page Layout editor for the Task page

   Lightning:

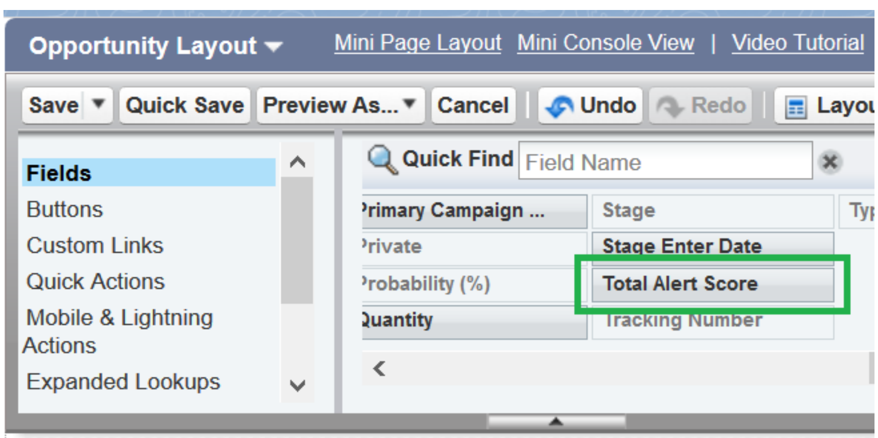
   Setup > Objects and Fields > Object Manager >

   Click the **Opportunity** link in the list **> Page Layout**

   Classic:

   Setup > Customize > Opportunities > Task Page Layout

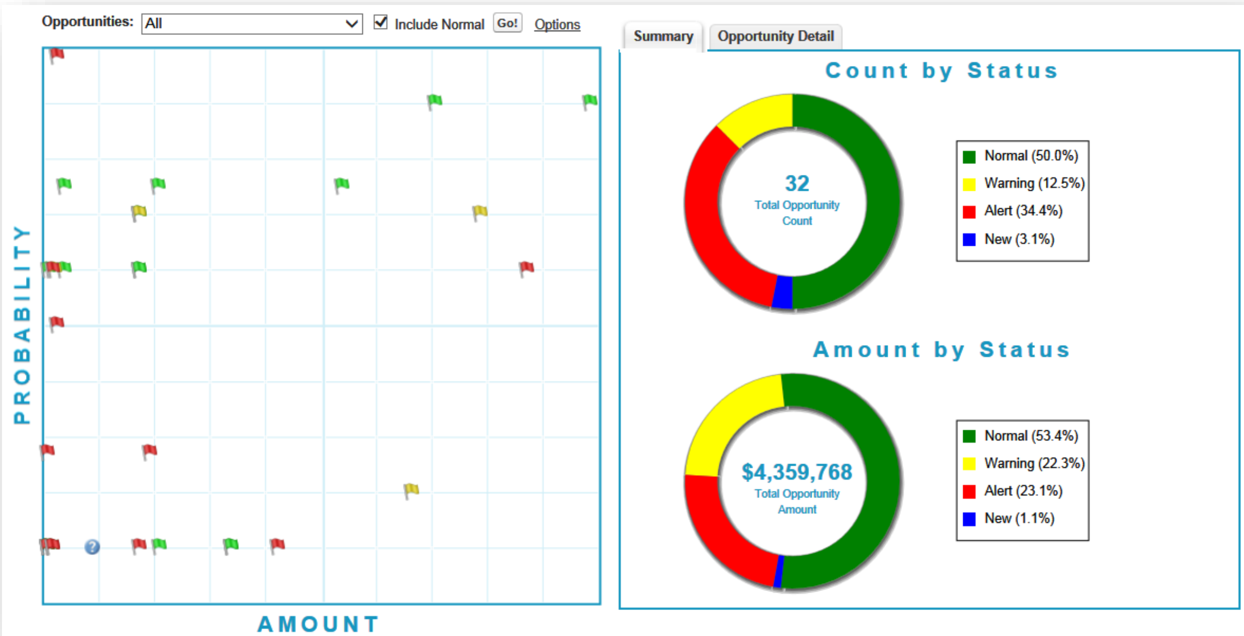
2. Locate the **Total Alert Score** field in the list of fields at the top of the page.



3. Drag the field to the location on the Opportunity Page Layout that suits your layout best. The exact location does not impact the operation of the feature.
4. After placing the field on the layout, you will need to set its Read-Only property so that users will not be able to edit the Total Alert Score value. To access the field's Property page, click on the configuration "wrench" in the upper right-hand corner.
5. Check the **Read-Only** checkbox and click **OK.**
6. Click the **Save** button at the top of the layout editor to save your changes.

Opportunity Scoreboard

iTools Opportunity Status Monitor includes the powerful Opportunity Scoreboard, which is *the* place to go to quickly review the overall status of your opportunities and easily identify those most at-risk.



The iTools Opportunity Scoreboard is a custom Salesforce Tab that positions your opportunities in one of four quadrants based on their relative probability and amount values. Color-coded icons representing the Opportunity status are used as markers on the grid, which when selected, will display additional opportunity details on the right side of the page.

Display Options

You can change the set of opportunities displayed on the Opportunity Scoreboard based on ownership by changing the selection in the **Opportunities** dropdown list. The ownership options available include:

- **All** – Displays all open opportunities on the Scoreboard. The maximum number of opportunities displayed on the Scoreboard is 500.
- **My Team's** – Displays every open opportunity for you and all of your direct reports. Specifically, the opportunities displayed are those owned by you (the current user) and any user in Salesforce who is designated as your direct report as specified by either the Manager or Role field value on their Salesforce User record. Only those users whose Role is one level below in the hierarchy are considered to be direct reports.
- **Mine** – Displays all open opportunities owned by the current user.
- **Other User…** - Displays a user lookup data entry field from which an individual user can be selected. Once selected, the scoreboard will display all open opportunities owned by that user.
- *Direct Report* – Displays all open opportunities owned by the selected direct report. Each user designated as your (the current user) direct report is individually included as an option in the drop-down list. A direct report is specified by either the Manager or Role field value on the person's Salesforce User record. Only those users whose Role is one level below in the hierarchy are considered to be direct reports.

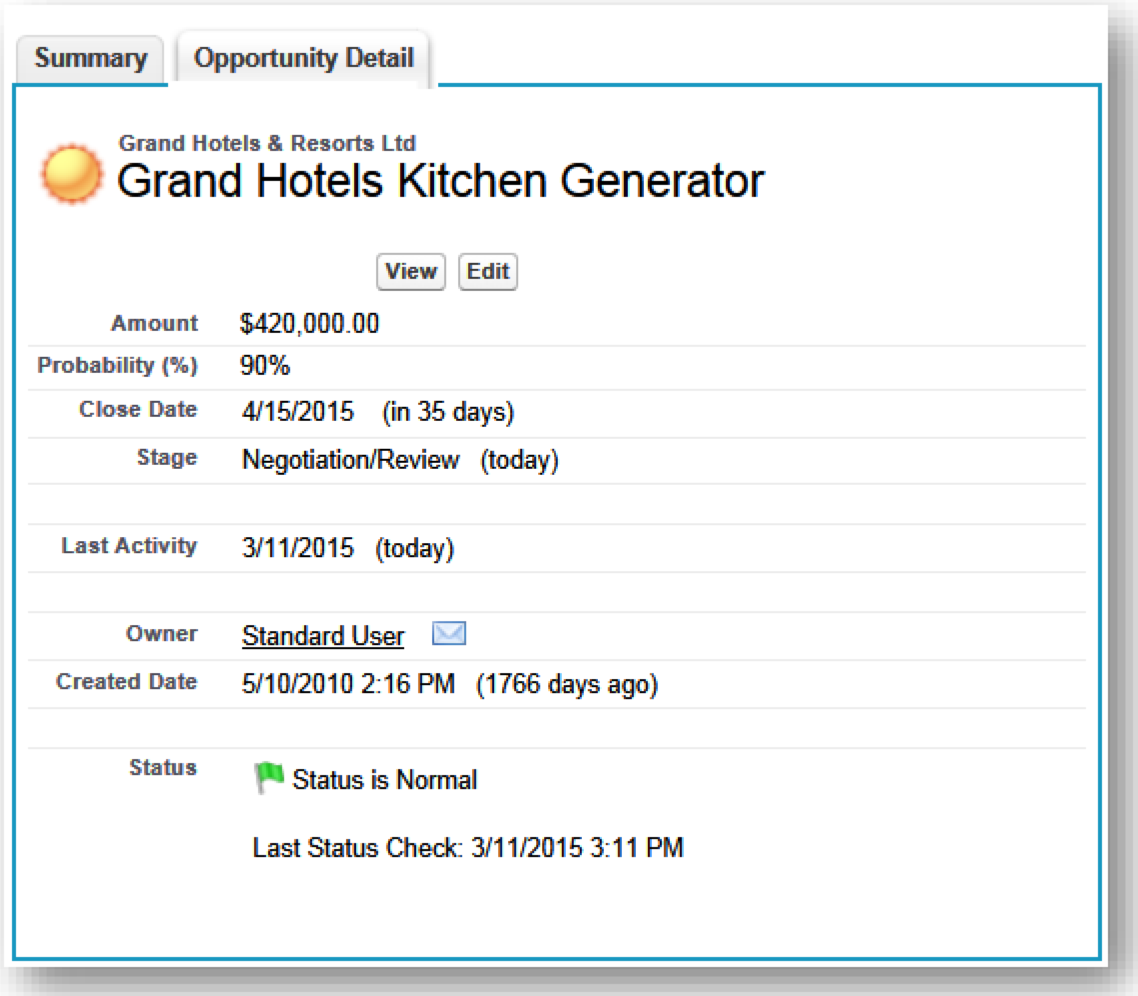
The **Include Normal** checkbox can be used to change the set of opportunities displayed based on the opportunity status value.

- Check the **Include Normal** checkbox to display opportunities of all statuses.
- Uncheck the **Include Normal** checkbox to display only those opportunities with a status of *Warning* or *Alert*.

The option selected in the **Opportunities** drop-down list and the state of the **Include Normal** checkbox when the Opportunity Scoreboard is initially displayed can be configured using the **DefaultScoreboardView** and **IncludeNormalOnScoreboard** iTools Settings. See the *Configuration Options* section of this guide for more details.

Opportunity Detail Fields

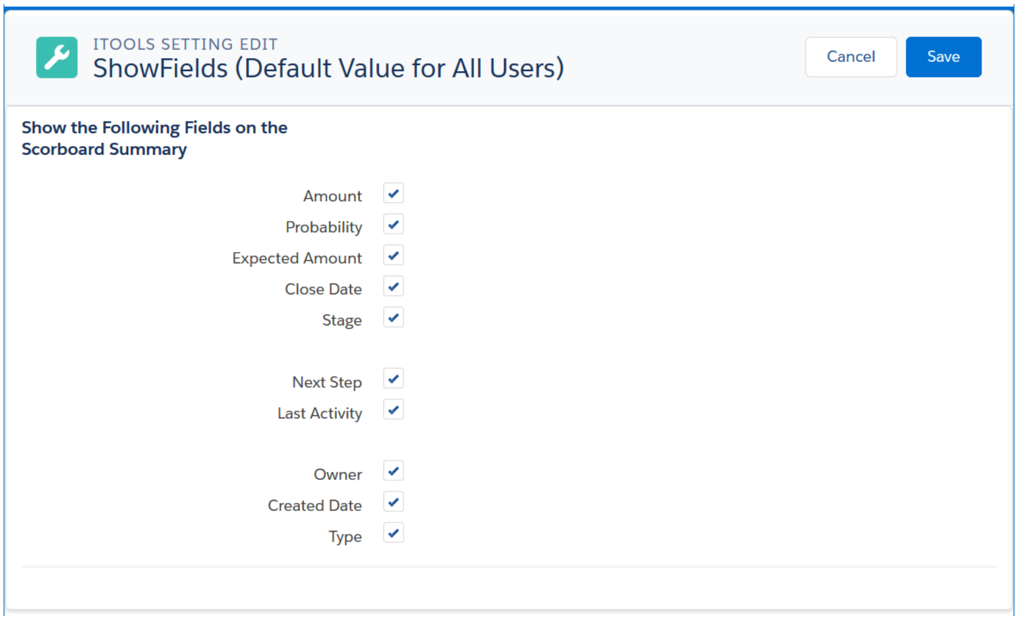
When a user first clicks on an icon in the scoreboard grid, the right-hand side of the scoreboard page will switch from the Summary tab to Opportunity Detail tab and display information about the selected opportunity.



You can control which fields from the opportunity are displayed on this tab to best meet the needs of your organization. Some of the fields are considered "standard" and have special display rules. Follow these instructions for hiding standard fields you do not use:

1. Access the **ShowFields** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.

2. Click the **Edit** button in the section titled Default Values for All Users to change the display for all users. You can also hide the fields for just certain Profiles or individual users by adding/editing the setting in the appropriate section.
3. Uncheck the setting for any field you wish to remove from the Opportunity Detail tab and click **Save**.



You can also add fields to the Opportunity detail tab section by adding Opportunity fields to a Field Set that was added by the iTools Opportunity Monitor installation process called Scoreboard Summary Fields. To add fields to this Field set, follow these instructions:

1. Navigate to the list of Opportunity Field Sets

    Lightning:

    Setup > Objects and Fields > Object Manager >

    Click the **Opportunity** link in the list **> Field Sets >**

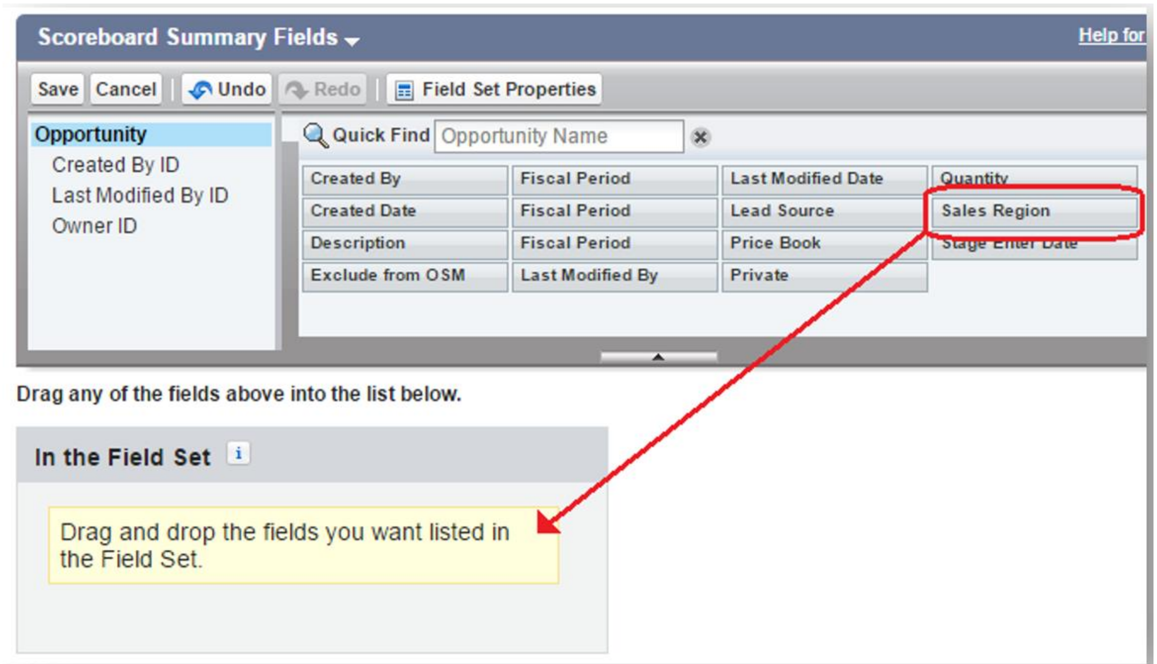
    Click the **Opportunity Summary Fields** field set link

    Classic:

    Setup > Customize > Opportunities > Field Sets >

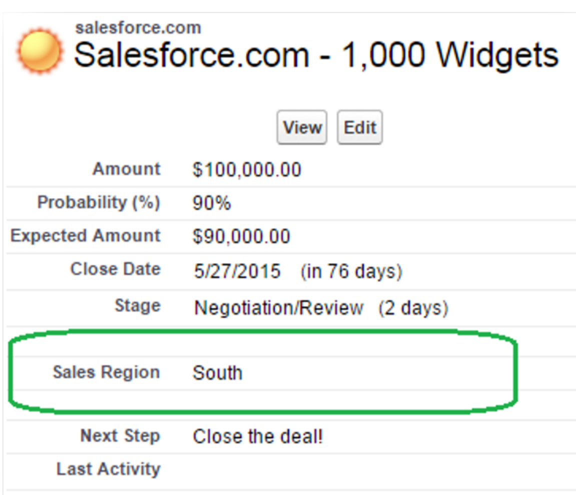
    Click on the **Edit** link next to **Opportunity Summary Fields**

2. Select a field you want added to the scoreboard's Opportunity Detail section and drag it into the field set.



3. Drag and drop other fields as needed. You can also control the display order by dragging the fields up and done within the field set.

4. Click **Save**.



How It Works

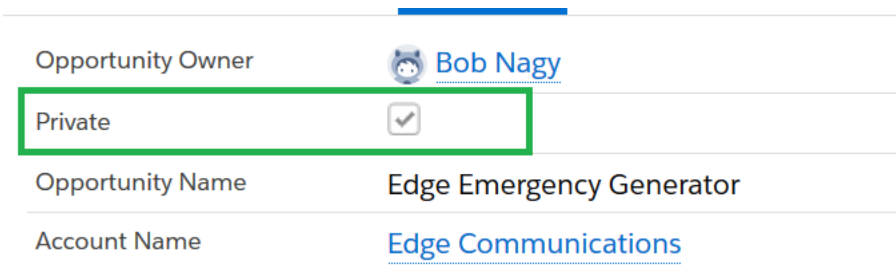
The Opportunity Scoreboard is designed to be simple to use and require little to no training. There are a few features you may want to point out to your users which include:

- A tooltip will display when you hover the mouse cursor over any one of the opportunity icons in the Scoreboard. The information displayed in the tooltip is configurable and can be the Opportunity Name, Account Name or Owner Name. To change the field used for the tooltip, click the **Options** link located to the right of the Go button.

  You can control what field is used for the tooltip when the Scoreboard is initially displayed by setting the **DefaultScoreboardTooltip** iTools Setting value. See the *Configuration Options* section of this guide for more details.
- To update the Opportunity Details displayed on the right side of the page, simply click on any icon in the Scoreboard.
- If one or more opportunities have the same (or very similar) Probability and Amount values, their icons will display 'stacked' on top of each other. To remove the top icon from the Scoreboard in order to access the one(s) beneath, double click the top opportunity icon. To return all icons to the Scoreboard, simply click the **Go** button, which is located to the left of the Options link.
- To send an email message to an opportunity owner, click on the small blue envelope next to the owner’s name in the Opportunity Details section of the page.

Private Opportunities

In Salesforce, if you want to limit who can see an opportunity, you can mark that opportunity as 'private.' Private activities can only be viewed on screen and in reports by 1) the opportunity owner, 2) any user with a role above the opportunity owner in the hierarchy and 3) system administrators.



Because the OSM Status Alert email notifications and Chatter posts could potentially expose information about these private opportunities to others, the Opportunity Status Monitor is initially configured to not include private opportunities in its status checking process. For private opportunities, the opportunity status value will be automatically set to 'Private' and no status alerts will be generated or Total Alert Score calculated.

If, however, you would like private opportunities included in the status check process, you can enable the capability by changing the value of the **IncludePrivate** iTools setting to **Y**(es). Please note that you should only change the setting after you have verified that your Opportunity Status Monitor notifications will only be sent/seen by users that would already have access to the private opportunities anyway. Additional information regarding the **IncludePrivate** setting is provided in the *Configuration Options* section of this guide.

Running the Opportunity Status Check

Once the status check settings have been configured and your users assigned to the appropriate OSM Profiles, you are now ready to run the Opportunity Status Check and start seeing some results. The Opportunity Status Check evaluates each open opportunity and creates Status Alerts, calculates the Total Alert Score, and sends notifications in accordance with your iTools Settings and OSM Profiles configuration.

The status check is a Batch Apex process that can be manually initiated or configured to run on a scheduled basis. When the Status Check is manually initiated, you are given the option to suppress notifications, which is useful in certain situations, such as when the Status Check is run for the first time.

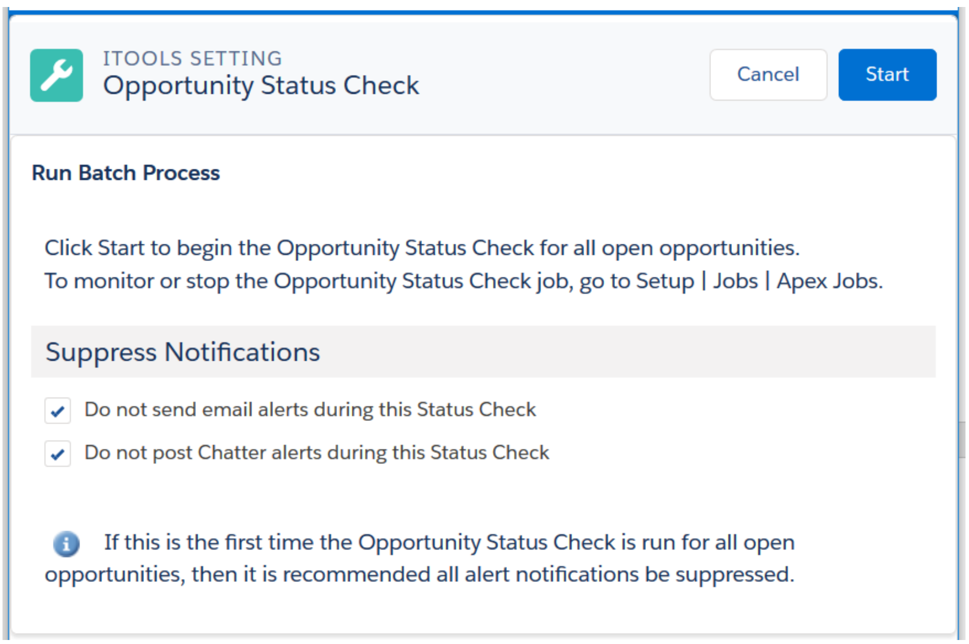
It is strongly recommended that the first Status Check be manually initiated and all notifications suppressed. This will eliminate the potential overwhelming barrage of email notifications that would result as the system establishes its 'initial state'. It also lets you verify that your organization is properly licensed for your current volume of open opportunities. See the *Licensing* section of this guide for complete details regarding Opportunity Status Monitor licensing.

The Opportunity Status Check should always be run or scheduled by a user with the System Administrator profile.

Manually Run the Opportunity Status Check

To manually initiate the Opportunity Status Check batch process, follow these simple steps:

1. Select the **RunStatusCheck** setting from the iTools Settings. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. On the Run Status Check page, check or uncheck the options in the Suppress Notifications section as appropriate. If the Status Check has not previously been run, then the options in the Suppress Notifications section will be automatically checked. Anytime you run the process manually after the initial run, the notification options will be unchecked.
3. Click the **Start** button to begin the Status Check.



After starting the status check, you will be returned to the iTools Settings page. Please note that the value of the **RunStatusCheck** setting will not be updated until the batch process completes.

You can check the status of the batch job by going to:

Lightning:

Setup > Environments > Jobs > Apex Jobs

Classic:

Setup > Jobs > Apex Jobs

Then locate the job with the Apex Class value of **InSitu_BatchStatusCheck**.

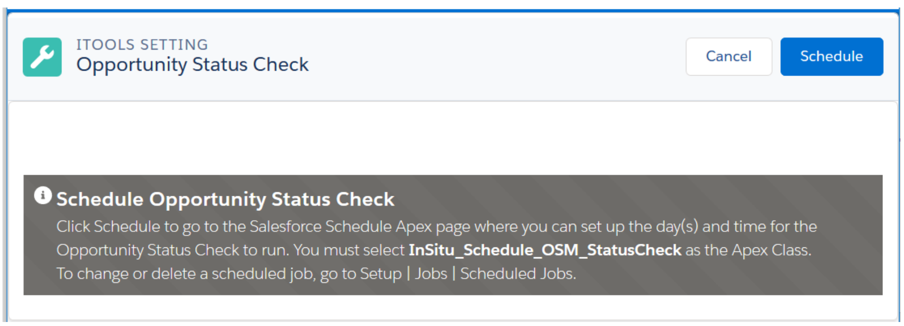
Only those users permitted to view and modify all Opportunity records should manually run the Opportunity Status Check job. This generally means users assigned the System Administrator profile.

Schedule the Opportunity Status Check to Run Automatically

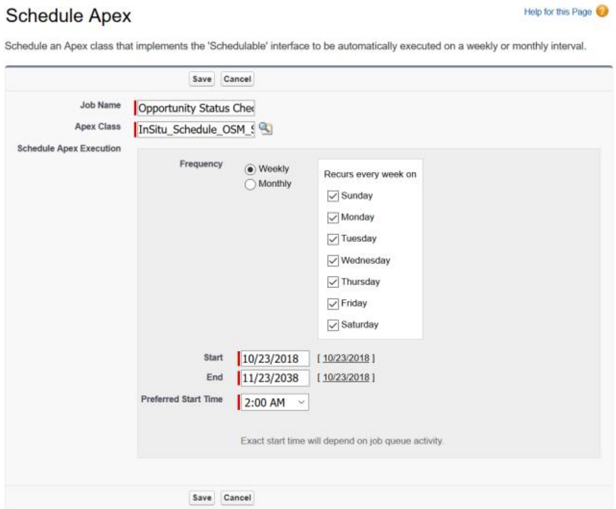
To continually process new opportunities and keep the opportunity status scores up to date, the OSM Status Check needs to run on a regular basis. As a batch Apex job, you can schedule the Status Check to run automatically at a time and frequency that fits the needs of your sales management team. Using the built-in Salesforce scheduler, you can schedule the Status Check to run as frequently as once per day, which is the typical configuration. In addition, you should select a time of day when Salesforce activity is low, such as late in the evening or early in the morning of what you consider your organization's business day.

To schedule the status check batch process to run on a regular basis, follow these simple steps:

1. Access the **ScheduleStatusCheck** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click the **Schedule** button.



3. Enter a Job Name, select the Apex Class `InSitu_Schedule_OSM_StatusCheck`, fill in the execution schedule, and click **Save**.



A scheduled Apex Job cannot be edited or paused. If you need to change the execution schedule or eliminate it completely, you must delete the scheduled job and create a new one with the desired changes.

You can access the list of schedule jobs by going to:

Lightning:

Setup > Environments > Jobs > Scheduled Jobs

Classic:

Setup > Jobs > Scheduled Jobs

Only those users permitted to view and modify all Opportunity records should schedule the Opportunity Status Check job. This generally means users assigned the System Administrator profile.

If the account of the user who schedules a job is made inactive, that scheduled job will fail each time it runs. If possible, you should log in using a dedicated system/integration account or the root account (first account given to your organization in Salesforce which cannot be inactivated) when scheduling jobs.

Run a Status Check on a Single Opportunity

The Opportunity Status Check can be run at any time against a single opportunity by a system administrator or the opportunity owner by simply clicking on the **Run Status Check** link at the bottom of the custom opportunity status control on the opportunity detail page. If your Opportunity detail page is configured with the Status Alerts related list, there is a **Run Status Check** button at the top of the section which can also be used to run the Status Check for the current opportunity.

For the opportunity owner to be able to run an on-demand status check for the current opportunity, the following configuration steps must be performed:

1. The **AllowOwnerRunCheck** iTools Setting must be set to **Y**(es).
2. The opportunity owner must be assigned a license to the iTools Configuration Manager package.

If you have users that should be permitted to run a status check on a specific opportunity but they are not the opportunity owner or a system administrator, assign their user account the **iTools Opportunity Status Checker** permission set. These users must still have been assigned a license to the iTools Configuration Manager and have Read/Write access to the opportunity.

Configuration Options

All iTools, including Opportunity Status Monitor, include an extensive set of configuration settings used to control the appearance and behavior of the tool. These settings, called iTools Settings, belong to the iTools Configuration Manager package and are viewed and updated via the iTools Settings tab. The complete set of configuration options for Opportunity Status Monitor are as follows:

Profiles

This setting is the link to the custom OSM Profiles page where you can create and manage your OSM Profiles. The value of this setting is simply the number of OSM Profiles defined in your organization. For additional details regarding OSM Profiles, see the *OSM Profiles* section in this guide.

DefaultProfile

Specifies the OSM Profile to use when the Status Check encounters an opportunity owned by a user that is not associated with an OSM Profile. Any OSM Profile can be designated as the default profile. If no value is specified, then any opportunity whose owner is not associated with an OSM Profile will be skipped by the Opportunity Status Check and the Opportunity Status will be assigned a value of 'No Profile'.

If only one OSM Profile is needed for your organization, you can skip the process of associating users with that profile and just designate it as the **DefaultProfile**.

LicenseKey

This setting must be set to the special Opportunity Status Monitor License Key value sent to your organization from InSitu Software. Without a valid license key entered into this setting, you will be limited to a maximum of 5 users which may cause the Opportunity Status Check to produce incomplete results. See the *Licensing* section of this guide for more details about iTools Licensing and the OSM License Key.

ProfileOverrideField

This setting identifies an Opportunity custom field that specifies an OSM Profile to be used in a Status Check rather than the one associated with the opportunity's owner.

DefaultScoreboardView

Designates the value to be displayed in the Opportunities dropdown list when the Opportunity Scoreboard is initially displayed. Available options are:

- **All** – Displays all open opportunities on the Scoreboard.
- **My Team's** – Displays every open opportunity for the current user and all of his/her direct reports. Specifically, the opportunities displayed are those owned by the current user and any user in Salesforce who is designated as a direct report as specified by either the Manager or Role field value on their Salesforce User record. Only those users whose Role is one level below in the hierarchy are considered to be direct reports.
- **Mine** – Displays all open opportunities owned by the current user.

IncludeNormalOnScoreboard

Indicates whether the **Include Normal** checkbox on the Opportunity Scoreboard page is checked when the tab in initially displayed.

If you want the **Include Normal** checkbox to be initially checked, select **Y**(es). Otherwise, select **N**(o).

DefaultScoreboardTooltip

Designates which opportunity field value should be used as the tooltip text for the Opportunity icons on the Scoreboard when the Tab is initially displayed. Available options are:

- Opportunity Name
- Account Name
- Owner Name

LowestScoreboardAmount

Designates the minimum value for the Amount value range used to plot opportunities on the Opportunity Scoreboard. If the setting value is blank, the Scoreboard will use the lowest amount from all the open opportunities accessible to the current user as the minimum value. If an amount is specified and an open opportunity has a value less than that amount, the opportunity's icon will be positioned on the left-most edge of the graph.

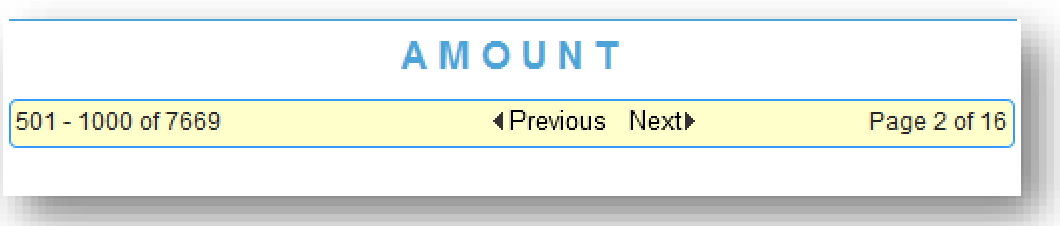
HighestScoreboardAmount

Designates the maximum value for the Amount value range used to plot opportunities on the Opportunity Scoreboard. If the setting value is blank, the Scoreboard will use the highest amount from all the open opportunities accessible to the current user as the maximum value. If an amount is specified and an open opportunity has a value greater than that amount, the opportunity's icon will be plotted on the right-most edge of the graph.

> Specifying a value for the LowestScoreboardAmount and HighestScoreboardAmount settings has the following benefits:
>
> 1. Ensures the scale is consistent for all users all the time.
>   Without fixed endpoints, the scale will vary based on which open opportunities are accessible to the current user. Any change in the status or accessibility of an opportunity with the largest or smallest amount value will change the scale, resulting in a new location for every opportunity on the Scoreboard.
> 2. Eliminates the bunching of opportunities when a small number of outlier values are included in the set displayed on the Scoreboard.
>   Specifying values that more closely represent the expected minimum and maximum Amount values will result in a more even spread of opportunities mapped on the Scoreboard grid, making it easier to read and analyze.

PageSize

Indicates the maximum number of Opportunities plotted on the Opportunity Scoreboard at one time. If the current view criteria results in more than one "page" worth of data, the page navigation controls will be automatically be displayed below the scoreboard grid.



CurrencySymbol

Specifies the character(s) to use as the currency symbol when displaying monetary values on the Opportunity Scoreboard. This setting is only used if you are a single currency Salesforce environment. If you have enabled multiple currency support,

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currency values on the scoreboard page are formatted using the Salesforce standard for multiple currency environments.

XAxisField

Specifies the opportunity field you would like to use for the X-Axis of the Opportunity Scoreboard grid. By default, iTools uses the standard Amount field but if your organization prefers to identify the value of an opportunity using a different Number or Currency field, you can specify that field using this setting.

XAxisLabel

Specifies the text to be used along the X-Axis of the Opportunity Scoreboard grid. This setting is generally changed when the **XAxisField** setting is changed.

NOTE: The Y-Axis label is always “PROBABILITY” so for visual consistency the label text should be entered in all capital letters.

ShowFields

Provides access to a collection of settings used to hide standard fields on the Opportunity Detail tab that your organization is not using.

NewWindow

Indicates if you would like the View and Edit buttons in the Opportunity detail section of the Opportunity Scoreboard page to display the Detail and Edit pages in a new browser window/tab or use the existing.

If you want the View and Edit buttons to display the Opportunity Detail and Edit Opportunity pages in a new browser window, select **Y**(es). Otherwise, to navigate to those windows using the current browser window, select **N**(o).

NOTE: This setting only applies to users using the Salesforce.com Classic user interface.

IncludeOSMProfiles

Indicates if you want each OSM Profile included in the user filter list on the Opportunity Scoreboard page. If the OSM Profiles are included and one is selected, all open opportunities owned by users assigned to that OSM Profile will be displayed on the Scoreboard page (assuming the current user has view access to those opportunities).

NOTE: If you have set the DefaultProfile setting, users that are associated with that profile by default rather than explicitly associated will NOT be included when the profile is selected as the filter.

If you want all the OSM Profiles included in the user filter list, select **Y**(es). Otherwise select **N**(o).

IncludePrivate

Indicates whether the Opportunity Status Check should process private opportunities. If private opportunities are not included in the Opportunity status check, they will automatically be assigned a status value of 'Private'.

If you want Private opportunities to be processed, select **Y**(es). Otherwise, select **N**(o). See the *Private Opportunities* section of this guide for more details about iTools OSM and Private Opportunities.

RunStatusCheck

Link to the custom Run Status Check page where you can manually initiate the Opportunity Status Check. The value of this setting is simply the date and time this process was last run - either manually or as a scheduled process. For additional details, see the *Running the Opportunity Status Check* section in this guide.

ScheduleStatusCheck

Link to the custom Schedule Status Check page where you can schedule the status check batch process to run on a regular basis. The value of this setting will always be blank. For additional details, see the *Running the Opportunity Status Check* section in this guide.

IncludeWeekends

Indicates whether Saturdays and Sundays should be included when calculating age or duration when performing a status check. If you include weekends, durations are calculated using the standard Salesforce Date object's daysBetween method. If you chose not to include weekend days, durations are calculated using a custom routine designed to work in the same manner as the Excel WORKDAYS function.

NOTE: iTools Opportunity Status Monitor does not currently support the ability to exclude holidays in the calculation of age and duration.

If you want to include Saturday and Sunday when calculating age and duration, select **Y**(es). Otherwise, select **N**(o).

MaximumNormalScore

When an opportunity is open and processed by the Status Check, it will be assigned one of three status values: Normal, Warning or Alert. The status value is assigned based on the calculated Total Alert Score for the opportunity and the numeric range specified for each of the 3 statuses. The **MaximumNormalScore** setting is used to set the highest possible Total Alert Score in the numeric range for the 'Normal' status. Generally, this value is left at 0, so that Opportunities with a status of 'Normal' are those without any Status Alerts.

For additional details, see the *Total Alert Score* section in this guide.

MaximumWarningScore

When an opportunity is open and processed by the Status Check, it will be assigned one of three status values: Normal, Warning or Alert. The status value is assigned based on the calculated Total Alert Score for the opportunity and the numeric range specified for each of the 3 statuses. The **MaximumWarningScore** setting is used to set the highest possible Total Alert Score in the numeric range for the 'Warning' status. Opportunities with Total Alert Scores greater than the **MaximumNormalScore** but less than or equal to the **MaximumWarningScore** will be assigned a status of 'Warning'. Opportunities with Total Alert Scores higher than this setting value will be assigned a status of 'Alert'.

For additional details, see the *Total Alert Score* section in this guide.

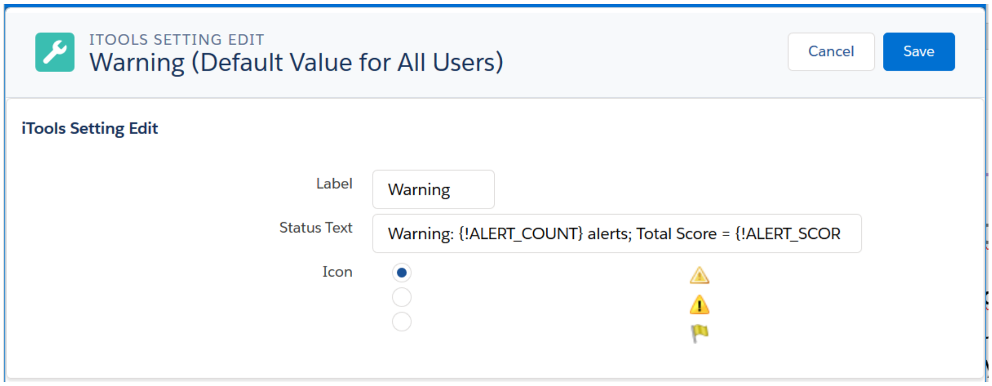
Status Value

There are nine different Status Value settings, one for each of the possible values for the custom opportunity status field: Normal, Warning, Alert, New, No Profile, Closed – Won, Closed – Lost, Excluded, and Private. The Status Value setting is unique in that it is comprised of multiple display options (rather than a single option) that are updated using a custom Edit page.

To edit the display options associated with a **Status Value** setting, simply follow the instructions below:

1. Select the **Status Value** Setting name in the list of settings for the iTools Opportunity Status Monitor. For this example, the **Warning** setting is chosen.
2. Select **Edit** in the Default Value for All Users section of the page.

   The following custom edit page will display:



- **Label** – The text used as the tooltip for the status value icon.
- **Status Text** – The text displayed on the first line of the custom status control immediately following the icon. This field supports the following tokens:

Token	Meaning
{!ALERT_COUNT}	The number of Status Alerts currently associated with the opportunity.
{!ALERT_SCORE}	The Total Alert Score for the opportunity.

- **Icon** – The visual indicator of the opportunity status. Not all Status Value setting allow you to specify an icon.

AllowOwnerRunCheck

Indicates whether the owner of an open opportunity is permitted to run an on-demand status check using the **Run Status Check** link. If you would like to show the **Run Status Check** link and allow the owner of an open opportunity to run an on-demand status check, select **Y**(es). Otherwise, select **N**(o).

If you select **Y**(es)for this option, you must also assign each opportunity owner a license to the iTools Configuration Manager package. See the *Run the Status Check for the Current Opportunity* section of this guide for more details about initiating an on-demand Status Check.

LastCheckLabel

Text used in the custom status control that precedes the date and time the last status check was run against the opportunity. A common reason to change this setting is to support users whose native language is not English.

RunCheckLabel

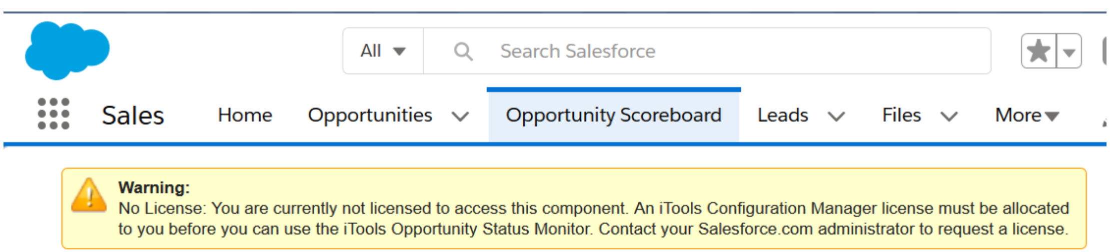
Text used in the custom status control for the link that initiates an on-demand status check. A common reason to change this setting is to support users whose native language is not English.

Licensing

The iTools Opportunity Status Monitor uses a combination of the Salesforce.com package licensing mechanism and its own License Key to control which users have access to its functionality. All Salesforce users will be able to view the results of the status check process and receive email notifications if appropriate.

iTools for Salesforce License

A license to the iTools Configuration Manager package is required for a user to access the 'Run Status Check' feature for opportunities they own or view the Opportunity Scoreboard page. Your organization receives one Configuration Manager license for every iTools subscription that has been purchased. Only users who have been assigned a Configuration Manager license will be able to successfully run the Opportunity Status Check from the **Run Status Check** link in the opportunity custom status control or the **Run Status Check** button on the Status Alert related list. Users who have not been assigned an iTool Configuration Manager license will see the following message of they attempt to access the Opportunity Scoreboard tab:



Automated Status Check of all Opportunities

The iTools Opportunity Status Monitor is most effective when configured and licensed to monitor all opportunities on a regularly scheduled basis. For full coverage, your organization must purchase an iTools license for each opportunity owner. If you do not have enough licenses for all opportunity owners, then the status check process will fail to evaluate certain opportunities, leaving them unchecked or in an outdated state.

How Many Licenses Do I Need?

The iTools Opportunity Status Monitor requires one iTools license for each unique opportunity owner, plus an additional license for the system administrator to access the various iTools configuration and settings options. Therefore, if your organization has 120 open or recently closed opportunities owned by 9 different salespeople, you will need to purchase 10 user licenses (9 owners plus 1 system administrator) to iTools for Salesforce. Please keep in mind that a license is required if an opportunity is open or closed since it was last checked, even if the owner is no longer an active Salesforce user at your organization.

The iTools Opportunity Status Monitor provides a couple ways to help you determine if you have purchased a sufficient number of licenses. First, the iTool will send an email message after the initialization process has successfully completed (see the *Check Initialization Results* section of this guide for more information regarding OSM Initialization). In the body of the text message, it will indicate how many users are currently owners of open opportunities and how many Opportunity Status Monitor licenses have been purchased. In addition, you will receive an email message when the Status Check is run. In the body of that email message, it will remind you that you do not have enough iTools licenses and indicate how many licenses are required to process all of your opportunities.

Subject: iTools Opportunity Status Monitor - Insufficient Licenses

The iTools Opportunity Status Check has successfully completed without errors.

At this time, your organization has 20 open Opportunities owned by 7 different users.

Warning: 2 opportunities were not processed. In order for all open opportunities to be included in the iTools OSM Status Check, you need to purchase a license for every opportunity owner. Currently, you have 5 licenses, but have 7 opportunity owners. If you purchased more than 5 user licenses, make sure you have entered your OSM License Key in the iTools LicenseKey Setting.

Additional details regarding Licensing and the OSM License Key are available in the iTools Opportunity Status Monitor Configuration Guide (http://chilp.it/f6bd01).

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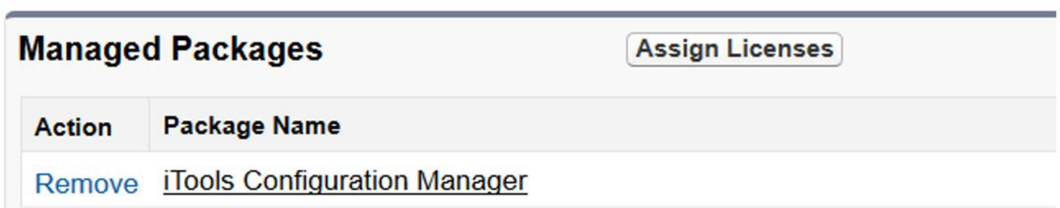
Unfortunately, it is not possible to control the order or selection of the opportunities processed by the OSM Status Check batch job. In addition, the Status Check will not be able to tell you which opportunities were skipped. To ensure all opportunities are regularly checked, the sufficient number of iTools licenses must be purchased.

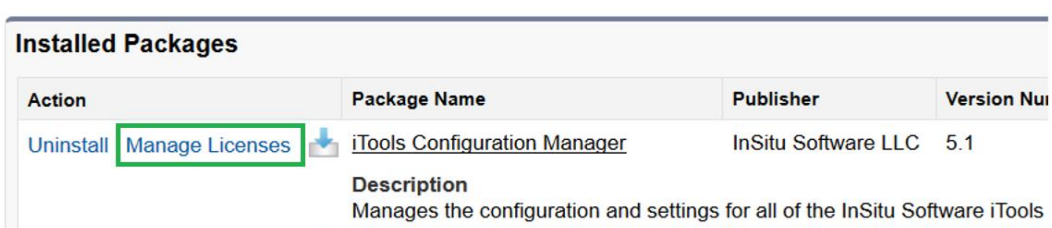
Assigning iTools Licenses

Only users who have been assigned an iTools Configuration Manager license will be able to successfully run the Opportunity Status Check 'on-demand' - from the Run Status Check link in the opportunity custom status control or the Run Status Check button on the Status Alert related list. If you want your users to be able to run 'on-demand' status checks for individual opportunities, you will need to assign each of them a license to the iTools Configuration Manager.

When adding one or a few new users to your Salesforce environment the easiest method of granting the required package license is to use the Managed Packages section of the User detail page. This section lists the currently applied licenses and includes an **Assign Licenses** button for accessing the administrative page used to apply (or remove) other managed package licenses.



However, if you are deploying the Opportunity Status Monitor tool to a significant number of users, you will find it easier to mass assign licenses from the license management page of the iTools Configuration Manager package. To access this, locate the **Installed Packages** section in Setup and click on the Manage Licenses link in the Action column next to the iTools Configuration Manager package.



From this page you can see all users already assigned a license to the package as well as add additional users using the **Add Users** button.

If you have installed iTools in a sandbox org, there is no license control and all users are automatically assigned a license to every managed package. If you need to test the impact of iTools on unlicensed users, please contact InSitu Software Technical Support and request that license control be enabled in your sandbox.

Opportunity Status Monitor License Key

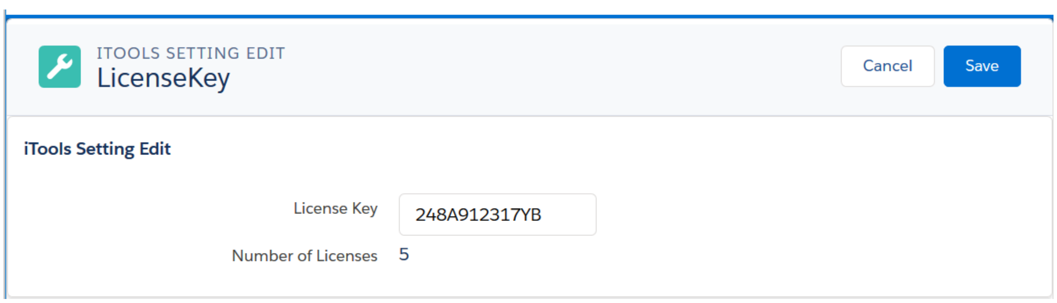
The iTools Opportunity Status Monitor relies on a special iTools License Key to properly monitor Opportunities based on the number of user licenses your organization has purchased. This License Key is specific to your organization and will be sent to you from InSitu Software upon purchase of iTools. Without a license key, you will be limited to a maximum of 5 users.

If you cannot locate your license key, contact InSitu Software technical support at support@insitusoftware.com and a new key will be sent to you.

To enter your license key, follow these simple step by step instructions.

1. Access the **LicenseKey** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.

2. Enter your key in the **License Key** field and click **Save**. The key is case-sensitive so you must enter the value exactly as it appears in the message you received from InSitu Software.



The value displayed for the Number of Licenses represents the number as of the last License Key update. To check that your newly entered key represents the correct number of licenses, access this page again ***after*** clicking Save. The value displayed for the Number of Licenses should now display the updated amount.

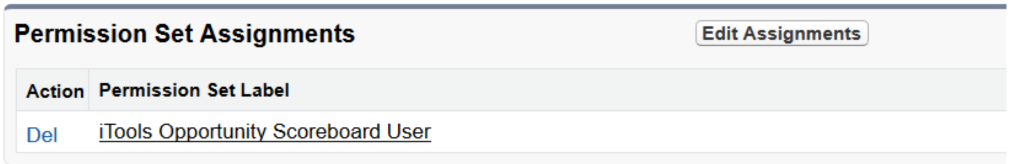
Package Resource Access

Before any user can access the tabs, custom objects, custom fields, code, or pages owned by an installed package they must first be granted the proper access to those resources. This access can be granted either by updating each of the account profiles used by your iTools users or by assigning one or more of the package's Permission Sets to the appropriate users. If, during the installation wizard you chose the **Install for All Users** option or you are using the Professional Edition of Salesforce.com, all your editable account profiles were automatically updated to grant full access to all the iTools Opportunity Status Monitor resources.

If you chose **Install for Admins Only** during the installation, then you will need to assign one or more Permission Sets to your users. Most of your users who are licensed for iTools Opportunity Status Monitor will only need to be assigned one Permission Set – ***iTools Opportunity Scoreboard User***. If you want to limit access to the scoreboard or allow users other than opportunity owners to run status checks on a single opportunity, use the table below to determine which permission set(s) should be added to your user accounts:

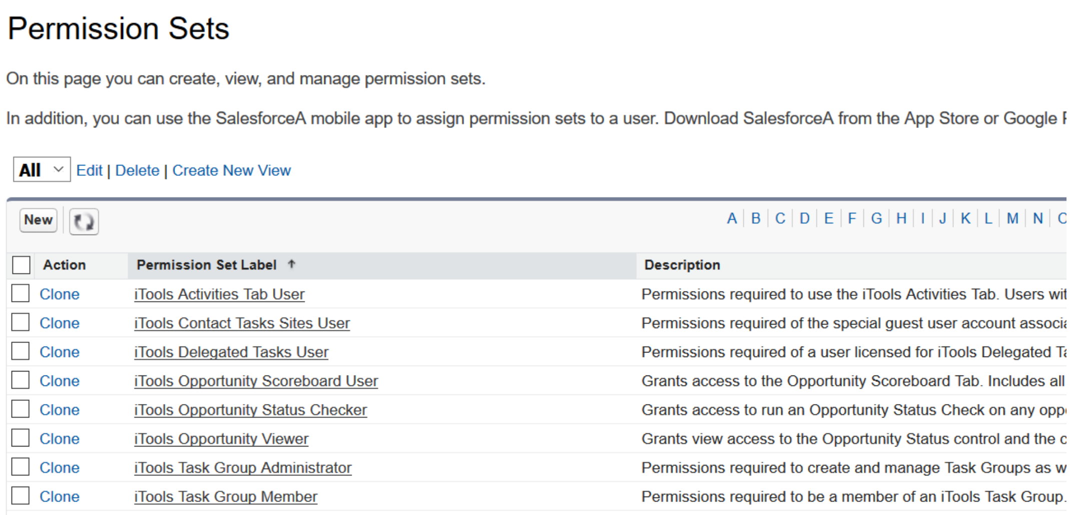
Permission Set	Usage
iTools Opportunity Viewer	Grants view access to the Opportunity Status control and the code and data that support it. Grant this permission set to any user that can view an opportunity if the Opportunity Status control is added to the Opportunity Detail page.
iTools Opportunity Status Checker	Grants access to run an Opportunity Status Check on any opportunity to which the user has View & Edit access even if they are not the opportunity owner. Includes all the permissions associated with the iTools Opportunity Viewer permission set.
iTools Opportunity Scoreboard User	Grants access to the Opportunity Scoreboard Tab. Includes all the permissions associated with the iTools Opportunity. Does NOT give user permission to view opportunities they would not normally be able to view.

When adding one or a few new users to your Salesforce environment the easiest method of granting the required Permission Set(s) is to use the **Permission Set Assignments** section of the User detail page. This section lists the currently applied Permissions Sets and includes an **Edit Assignments** button for accessing the administrative page for applying (or removing) other Permission Sets.



However, if you are deploying the Opportunity Status Monitor tool to a significant number of users, you will find it easier to mass assign the necessary Permission Set(s). To apply, or remove, iTools Opportunity Status Monitor related permission sets to/from your Salesforce user accounts just follow these simple steps:

1. Locate the Permission Sets section in Setup.



2. Click on the iTools permission set you wish to assign to users.
3. Click the **Manage Assignments** button at the top of the Permission Set detail page.
4. Click the **Add Assignments** button.
5. Select the users you want to assign by checking the checkbox in the Action column.
6. Click the **Assign** button.
7. Click the **Done** button.

Help and Support

Customer Focus is not just a phrase we toss around lightly at InSitu Software – it is the cornerstone of everything we do. Your success is vitally important to us. Whether you are a long-standing customer or just trying iTools for the first time with our no obligation free trial, if you are having trouble or just have a simple question we want to hear from you.

Email

This is our preferred method of providing support. It's not that we don't want to talk to you it's just that email is a much more efficient way to route your question/issue to the person who can best respond. We can also respond with more detailed instructions and screenshots.

Support@InSituSoftware.com

We are checking email all the time

Phone

If your question is easier to explain over the phone than in an email or you just want to hear a friendly voice, you can also call technical support at:

+1 (630) 557-9109

Monday thru Friday 9:00AM - 5:00PM CST