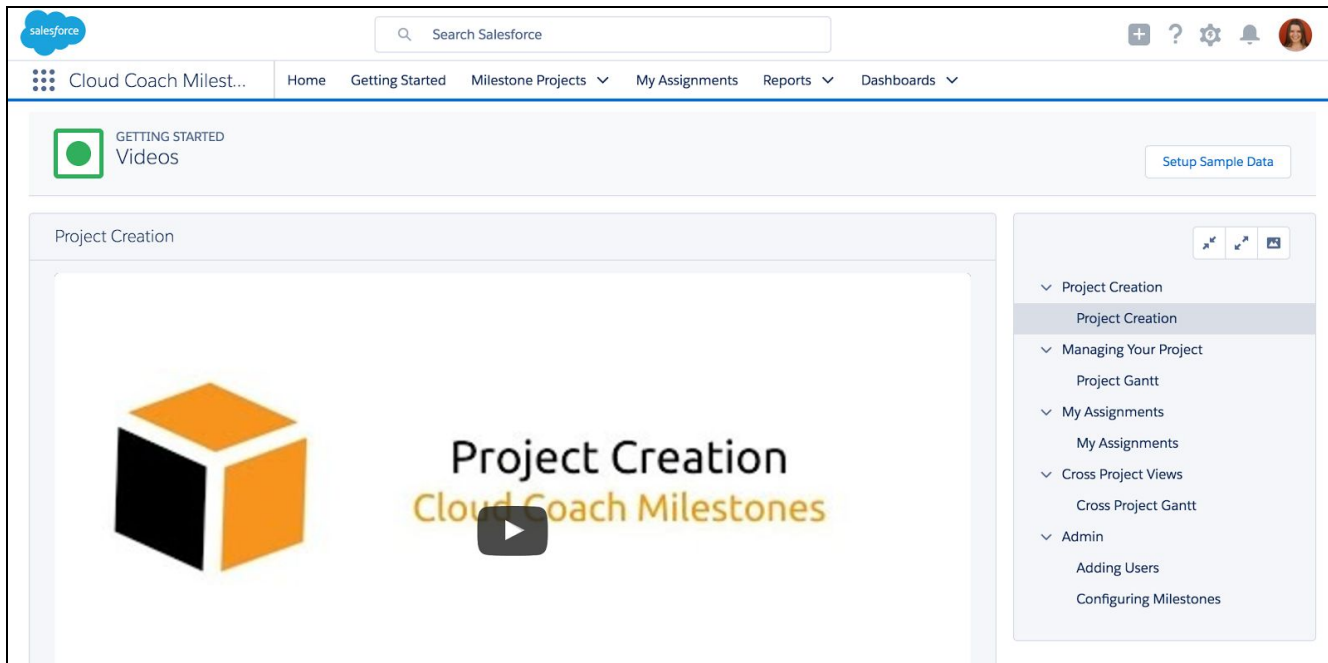


Demo Click Path Template

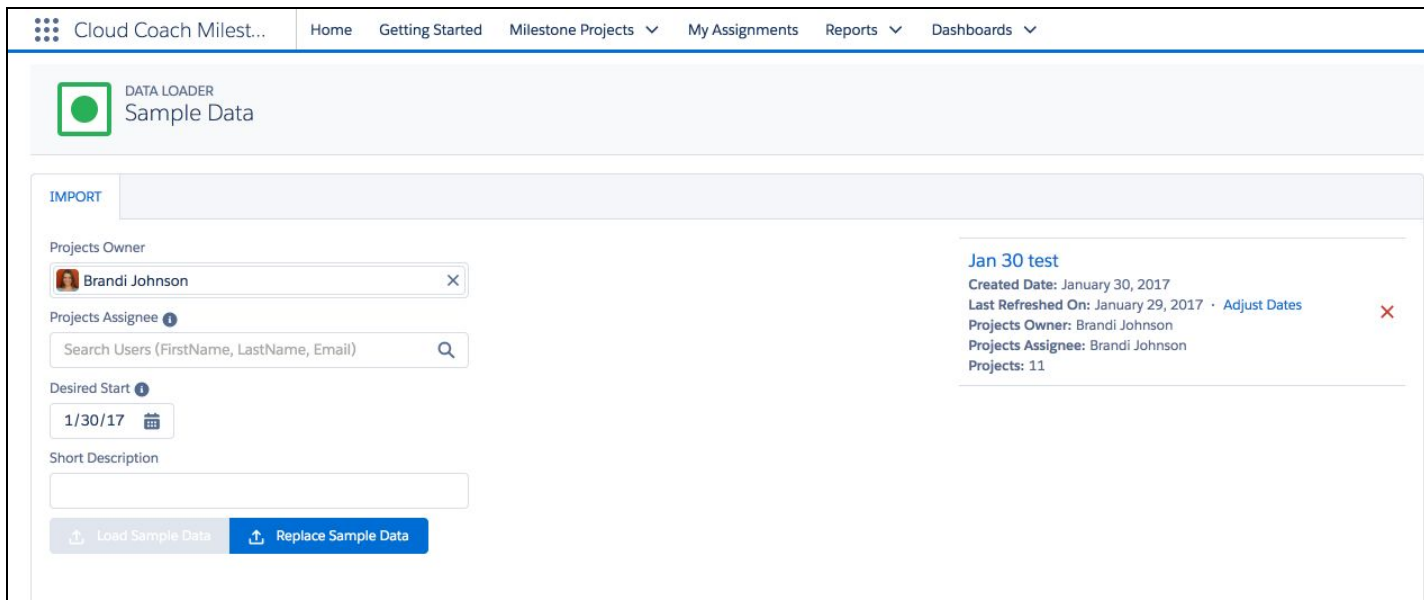
PRE-DEMO

1. Load Sample Data

- Start on the 'Getting Started' tab (This tab also includes training videos for end-users)
- Click on "Load Sample Data" in the upper right hand corner.



- Either choose to load new sample data, refresh existing sample data, or adjust the dates of a previous load. The sample data comes with 11 projects, including 4 project templates and 7 active projects.



- i. Using New Sample Data - *This is the only option the first time you load sample data.*
 1. Project Owner: Set as yourself
 2. Project Assignee: Any other user
 3. Desired Start Date: We recommend backdating this by approximately 1 month, so that some projects have already started when you run your demo.
 4. Short Description - Just a name for your sample data set - could be the date you created, or another description. It is for your use only.
- ii. Refresh Sample Data - *This will replace any existing sample data you have loaded, including any customizations to projects, task assignments, and dependencies. This is a good option if you want to essentially start from scratch.*
 1. Select Project Owner: Set as yourself
 2. Projects Assignee: Any other user
 3. Desired Start: Recommend 30-days backdated so some projects are underway at the time of your demo.
- iii. Adjust Dates - *On the right side of your screen, you'll see a box related to previously loaded sample data. You can choose to refresh the dates of all your sample data to the next Monday. (If the day you are updating data is a Monday, project start dates will be set to today.) This **does not** overwrite any other changes you have made, including task assignments, dependencies, completion percentages, etc.*

DEMO CHECKLIST:

Creating Projects

Start from an Opportunity to show seamless integration with Salesforce. Click on “New” In the Milestones Projects related list.

The screenshot displays the Salesforce CRM interface for an Opportunity record titled "Acme CRM Implementation". The record is in the "Closed Won" stage. The "RELATED" tab is active, showing a list of "Milestone Projects (0)" and "Products (1)". The "Products" list includes "CRM Implementation" with a quantity of 1.00 and a sales price of \$115,000.00. The "ACTIVITY" tab is also visible, showing a "Post" with the text "This record was updated. January 27, 2017 at 10:43 AM".

Project Creation Method 1:

☐ Create New - Only required field is Project Name.

☐ Add Tasks with start dates. You can do each manually or use the auto-fill section (black bar) to set things like start dates, duration, and description, etc.

☐ Add Dependencies

☐ Assign Resources

☐ Create subtasks

Cloud Coach Milestone Project

Getting Started Milestone Projects My Assignments Reports Dashboards

MILESTONE PROJECT
New Project

CREATE NEW CREATE FROM TEMPLATE Save Save as Template

▼ Project Details

* Name Description

Type --None--

| * NAME | * DESIRED START DATE | * DURATION | DESCRIPTION | DEPENDENT ON | ASSIGNED RESOURCES | MILESTONE SUB TASKS |
|--------|----------------------|------------|-------------|--------------|--------------------|---------------------|
| | | | | | | |
| 1 | | | | | Add | Add |

+ Add Task

Project Creation Method 2:

☐ Create from Template - allows you to create one from a project template already loaded from your Salesforce data

☐ Select your template - Sales Cloud Implementation. Automatically carries over tasks, durations, dependencies, assigned resources.

☐ Set your project name & desired start date

Cloud Coach Milest...

HomeGetting StartedMilestone ProjectsMy AssignmentsReportsDashboards

CREATE NEWCREATE FROM TEMPLATE

SaveSave as Template

▼ Project Details

* NameNew Project

DescriptionSales Cloud implementation project plan

TypeProfessional Services







* Desired Start Date

Template | Cloud Coach Implementation

Template | Customer Onboarding

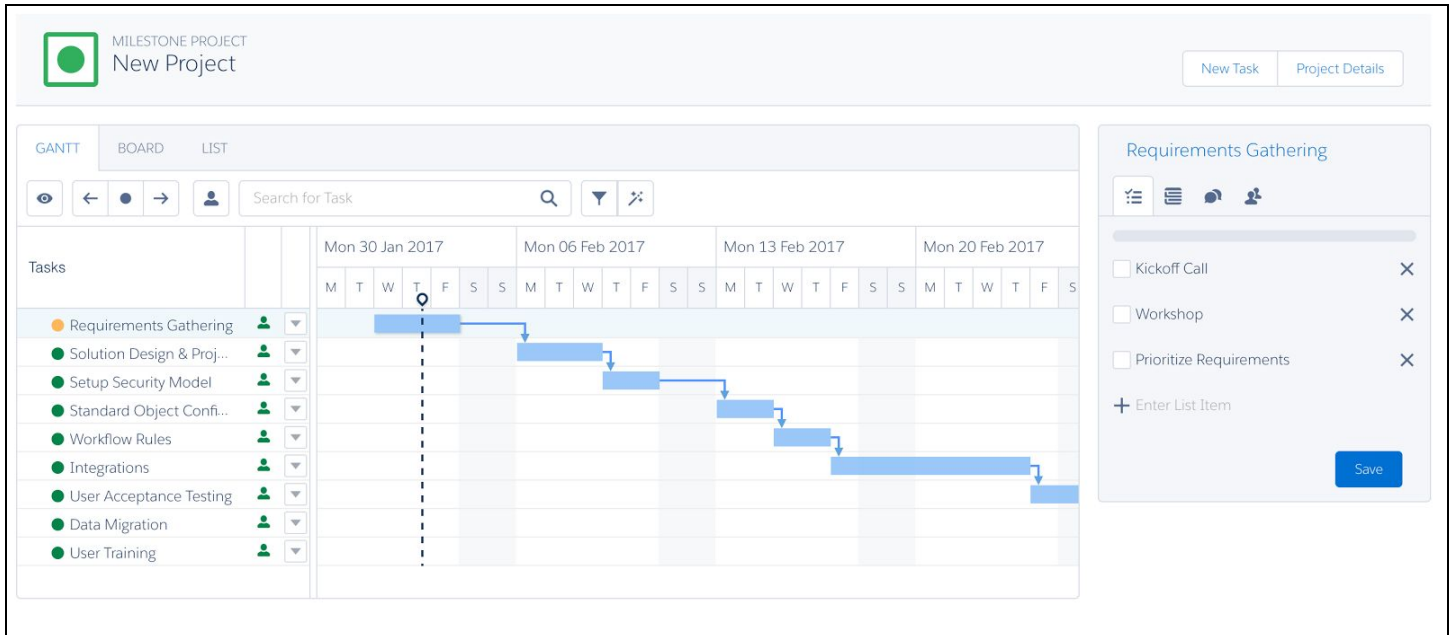
☒ Template | Sales Cloud Implementation

Template | Trade Show

| NAME | DESIRED START DATE | DURATION | PARENT TASK | ASSIGNED RESOURCES | MILESTONE SUB TASKS |
|--------------------------------|--------------------|----------|--|---|----------------------|
| Requirements Gathering | 2/6/17 | 3 | |  | View |
| Solution Design & Project Plan | 10/6/16 | 3 | Requirements Gathering |  | View |
| Setup Security Model | 10/6/16 | 2 | Solution Design & Project Plan |  | View |
| Standard Object Configuration | 10/6/16 | 2 | Setup Security Model |  | View |
| Workflow Rules | 10/6/16 | 2 | Standard Object Configuration |  | View |
| Integrations | 10/6/16 | 5 | Workflow Rules |  | View |

Project Views

Once you have created a new project, you'll see the project Gantt view.



- ☐ Change dependencies with Drag & Drop
- ☐ Change view (fit to screen)
- ☐ Show assigned resources on Gantt view
- ☐ Search for a task
- ☐ Filter tasks to show late or due in the next 7 days
- ☐ View critical path - tasks that drive the duration of the project. If any of these dates slip, the whole project duration slips.
- ☐ Task health status
 - Green = on time
 - Yellow = starting late
 - Red = ending late
- ☐ Resourcing - do we have someone assigned to work on the task?
 - Green = Yes
 - Red = No
- ☐ Add a new task - click on arrow next to task name, then select to add a new task above or below
- ☐ Delete a task

Management Panel

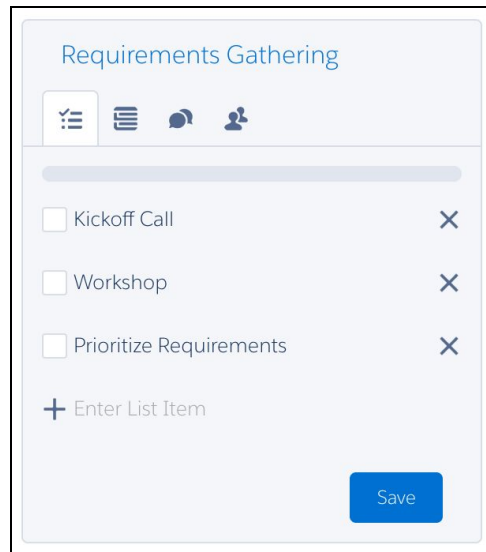
☐ View subtasks on any task

Completion of subtasks drives the completion of the whole task.

☐ Add subtasks

☐ Complete subtasks

☐ Complete task early to see how project timeline changes






The screenshot shows a modal window titled "Requirements Gathering". At the top, there are four icons: a list view icon (selected), a table view icon, a speech bubble icon, and a user icon. Below the icons is a horizontal scrollbar. The main area contains a list of subtasks, each with a checkbox, the subtask name, and a close button (X):

| Subtask | Close |
|--|-------|
| <input type="checkbox"/> Kickoff Call | X |
| <input type="checkbox"/> Workshop | X |
| <input type="checkbox"/> Prioritize Requirements | X |


Below the list is a text input field with a plus icon and the placeholder text "Enter List Item". At the bottom right is a blue "Save" button.

[] Details tab - show details of the task. Can change some details from this view. *The fields in this panel are controlled using a field set.*

Requirements Gathering



Completion Percent


Status 

Not Started


Name


Requirements Gathering

Description


* Desired Start Date 

2/1/17


Parent End Date 


Calculated Start Date 

2/1/17


Calculated End Date 

2/3/17


Completed Date 

* Duration 

3

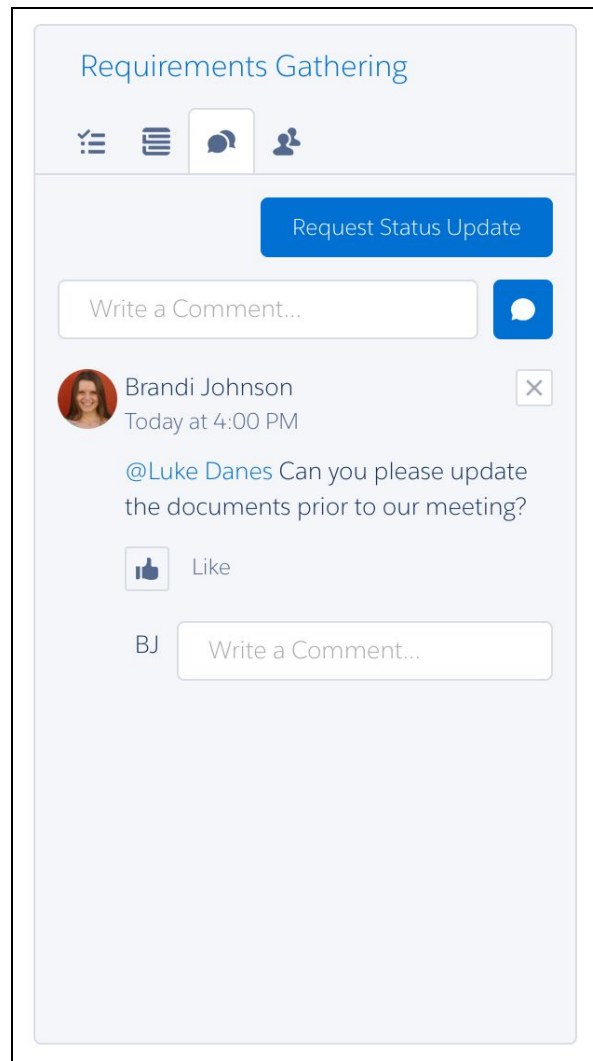
Calculated Duration 

3

Timeline Health 

Yellow

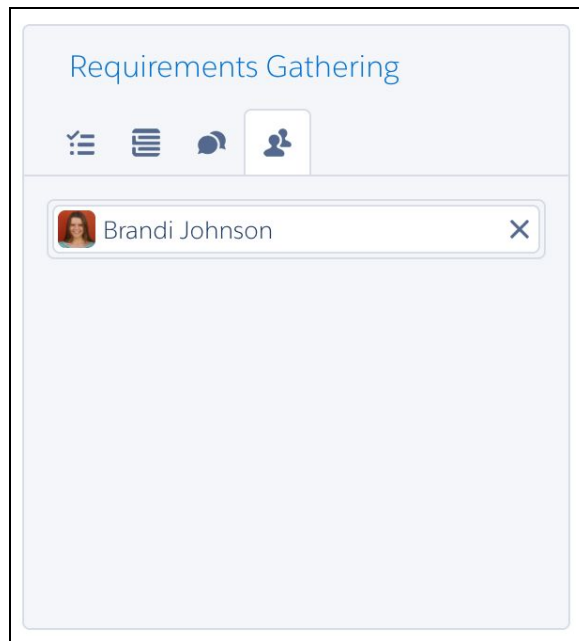
[] Chatter - @ mention team members and see discussion



☐ Assignments

☐ See who is assigned to work on the task

☐ Change task assignment



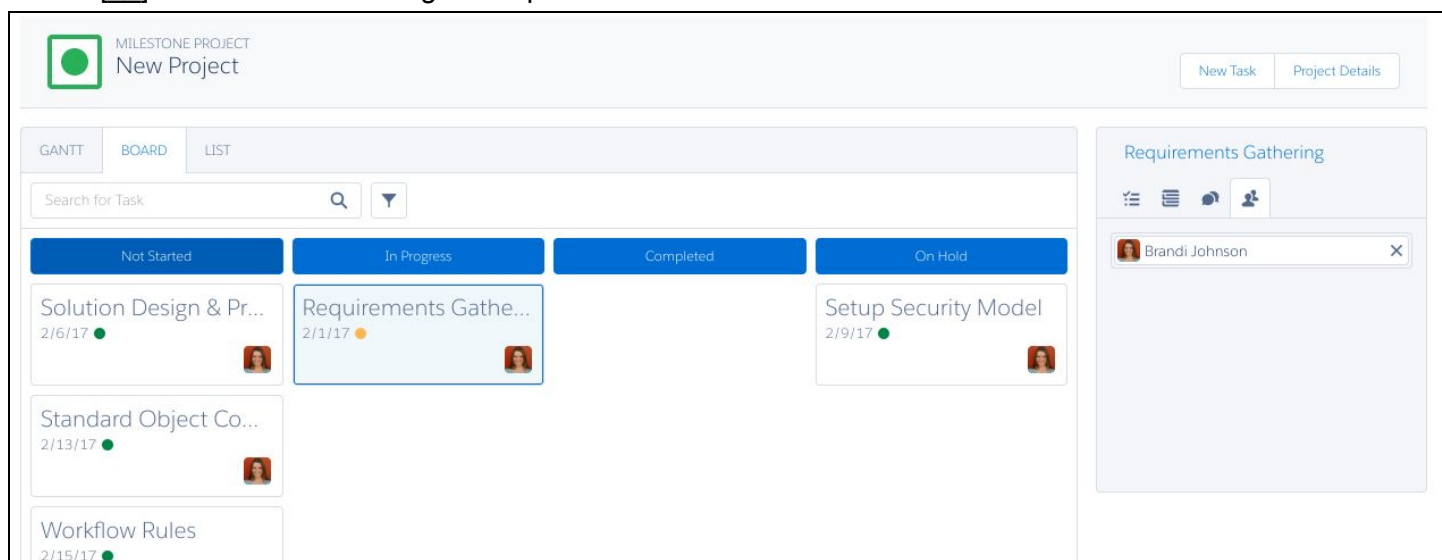
Project Management Views

By default, will go to timeline or Gantt view

☐ Board view


☐ Drag and drop cards to change status

☐ Still use same management panel





☐ List view

☐ Still use same management panel

 MILESTONE PROJECT
New Project





[New Task](#) [Project Details](#)



[GANTT](#) [BOARD](#) [LIST](#)

| NAME | CALCULATED START DATE | DURATION | CALCULATED END DATE | COMPLETION PERCENT | STATUS |
|--------------------------------|-----------------------|----------|---------------------|--------------------|-------------|
| Requirements Gathering | 2/1/17 | 3 | 2/3/17 | 0.00% | In Progress |
| Solution Design & Project Plan | 2/6/17 | 3 | 2/8/17 | 0.00% | Not Started |
| Setup Security Model | 2/9/17 | 2 | 2/10/17 | 0.00% | On Hold |
| Standard Object Configuration | 2/13/17 | 2 | 2/14/17 | 0.00% | Not Started |
| Workflow Rules | 2/15/17 | 2 | 2/16/17 | 0.00% | Not Started |
| Integrations | 2/17/17 | 5 | 2/23/17 | 0.00% | Not Started |
| User Acceptance Testing | 2/24/17 | 2 | 2/27/17 | 0.00% | Not Started |
| Data Migration | 2/28/17 | 1 | 2/28/17 | 0.00% | Not Started |
| User Training | 3/1/17 | 3 | 3/3/17 | 0.00% | Not Started |

Requirements Gathering


 Brandi Johnson 


Cross-Project Gantt View


☐ Milestones Projects tab - list view defaults to all projects, but can see all of the list views we created in our initial setup






☐ Project Templates

☐ My Projects

 CROSS PROJECT GANTT VIEW




[All](#) 

 [New Project](#)

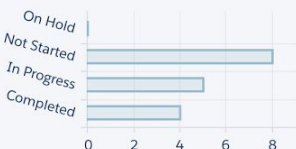
    

| Project | 2016 | 2017 | | | |
|-----------------------------|----------|----------|----------|----------|----------|
| | Dec 2016 | Jan 2017 | Feb 2017 | Mar 2017 | Apr 2017 |
| Universal Containers On... | | | | | |
| TechBuild Sales Cloud I... | | | | | |
| Acme Inc. Onboarding ... | | | | | |
| Dreamforce Booth Plan | | | | | |
| New York Trade Show | | | | | |
| New Project | | | | | |
| Template Cloud Coach... | | | | | |
| Template Customer O... | | | | | |
| Template Sales Cloud I... | | | | | |
| Template Trade Show | | | | | |
| Cloud Coach Implemen... | | | | | |
| Acme Inc. - Sales Cloud | | | | | |

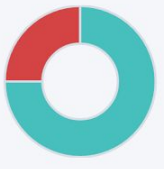
Acme Inc. Onboarding Project

Task Status

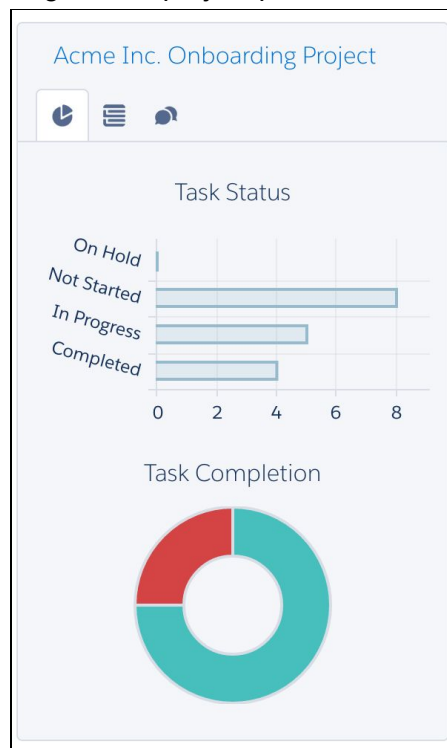


Task Completion



☐ Management panel

☐ Charts view - at a glance insights into project performance like task completion



☐ Project Details

Acme Inc. Onboarding Project

☐ ☒ ☐

* Name
Acme Inc. Onboarding Project

Status ⓘ
In Progress

Description
Onboarding of Acme Inc.

Calculated Start Date ⓘ
1/24/17

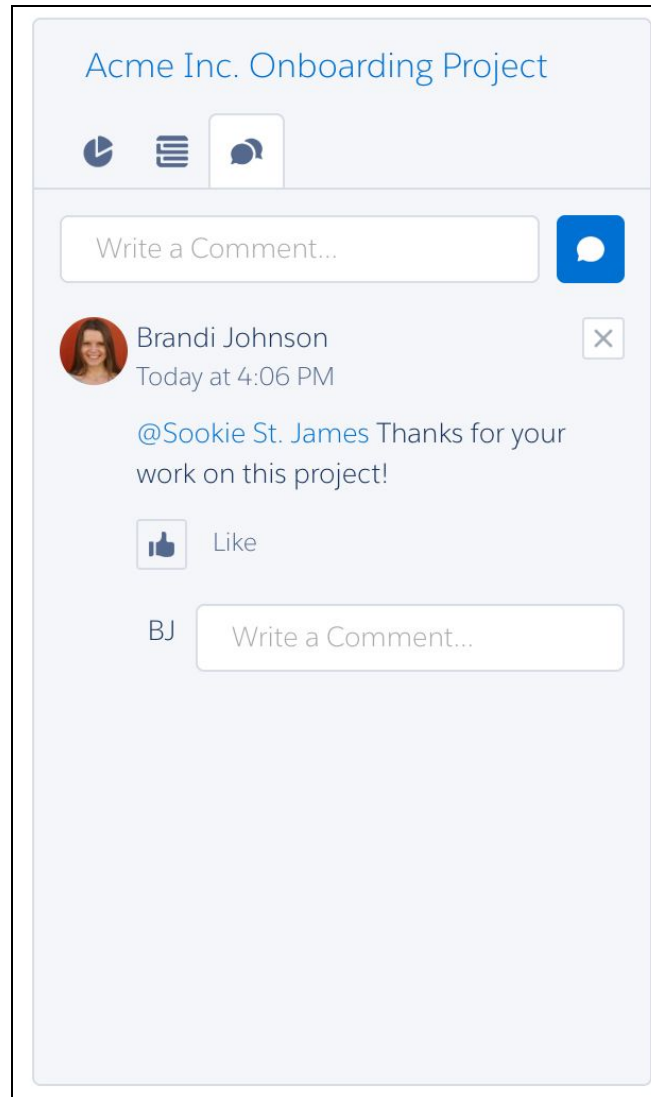
Calculated End Date ⓘ
2/23/17

Status Override ⓘ
--None--

* Owner ID
Brandi Johnson

Cancel Save

[] Project Chatter

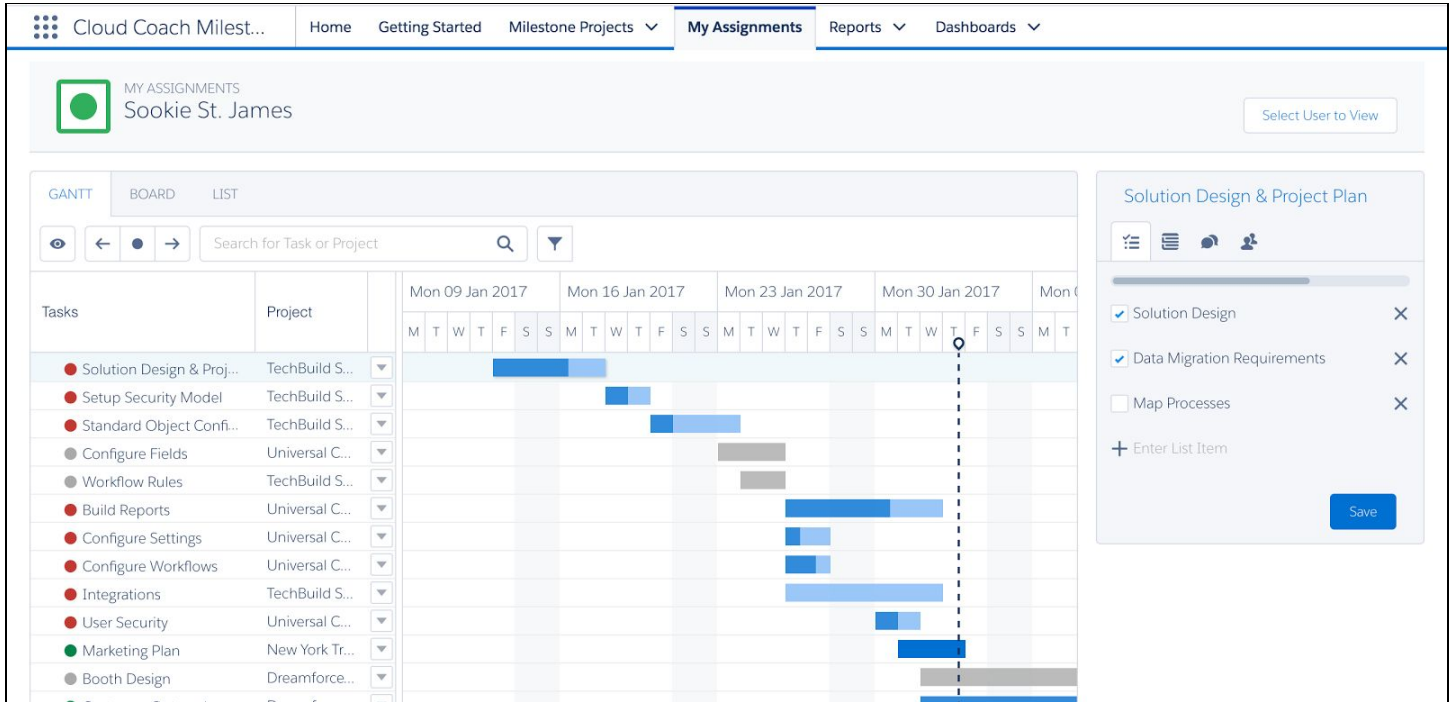


[] Double Click on any project name to open individual project view

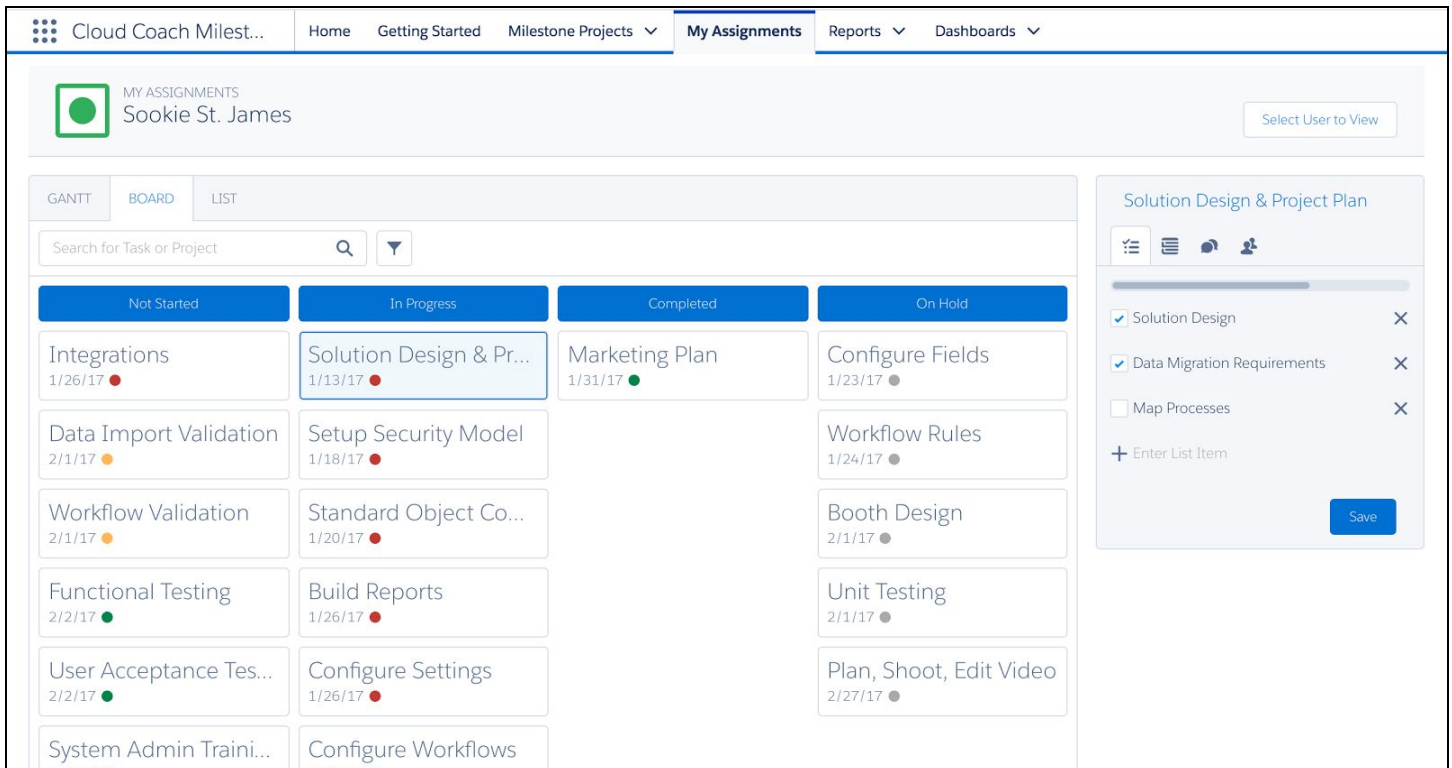
User View

☐ My Assignments - see every task assigned to me across all the projects. Use “Select User to View” button to pick the person we assigned tasks to in our sample data setup.

☐ Timeline view



☐ Board View - update task by dragging & dropping a card



List View

Cloud Coach Milest...

Home

Getting Started

Milestone Projects

My Assignments

Reports

Dashboards

MY ASSIGNMENTS

Sookie St. James

Select User to View

GANTT

BOARD

LIST

Search for Task or Project

Q

Y

| NAME | PROJECT | CALCULATED START DATE | DURATION | CALCULATED END DATE | COMPLETION PERCENT | STATUS |
|--|--------------------------------------|-----------------------|----------|---------------------|--------------------|-------------|
| <div></div> Solution Design & Project Plan | TechBuild Sales Cloud Implementation | 1/13/17 | 3 | 1/17/17 | 66.67% | In Progress |
| <div></div> Setup Security Model | TechBuild Sales Cloud Implementation | 1/18/17 | 2 | 1/19/17 | 50.00% | In Progress |
| <div></div> Standard Object Configuration | TechBuild Sales Cloud Implementation | 1/20/17 | 2 | 1/23/17 | 25.00% | In Progress |
| <div></div> Configure Fields | Universal Containers Onboarding | 1/23/17 | 3 | 1/25/17 | 0.00% | On Hold |
| <div></div> Workflow Rules | TechBuild Sales Cloud Implementation | 1/24/17 | 2 | 1/25/17 | 0.00% | On Hold |
| <div></div> Build Reports | Universal Containers Onboarding | 1/26/17 | 5 | 2/1/17 | 66.67% | In Progress |
| <div></div> Configure Settings | Universal Containers Onboarding | 1/26/17 | 2 | 1/27/17 | 33.33% | In Progress |

Solution Design & Project Plan

✓

Solution Design

×

✓

Data Migration Requirements

×

Map Processes

×

+

Enter List Item

Save

Color Coding Key:

- Red = task will finish late
- Grey = on hold
- Green = on time
- Yellow = task is starting late

Management panel

- Subtasks
- Chatter

Dashboards & Reports

[] All built on Salesforce reporting engine, so can be customized based on your own business needs.

