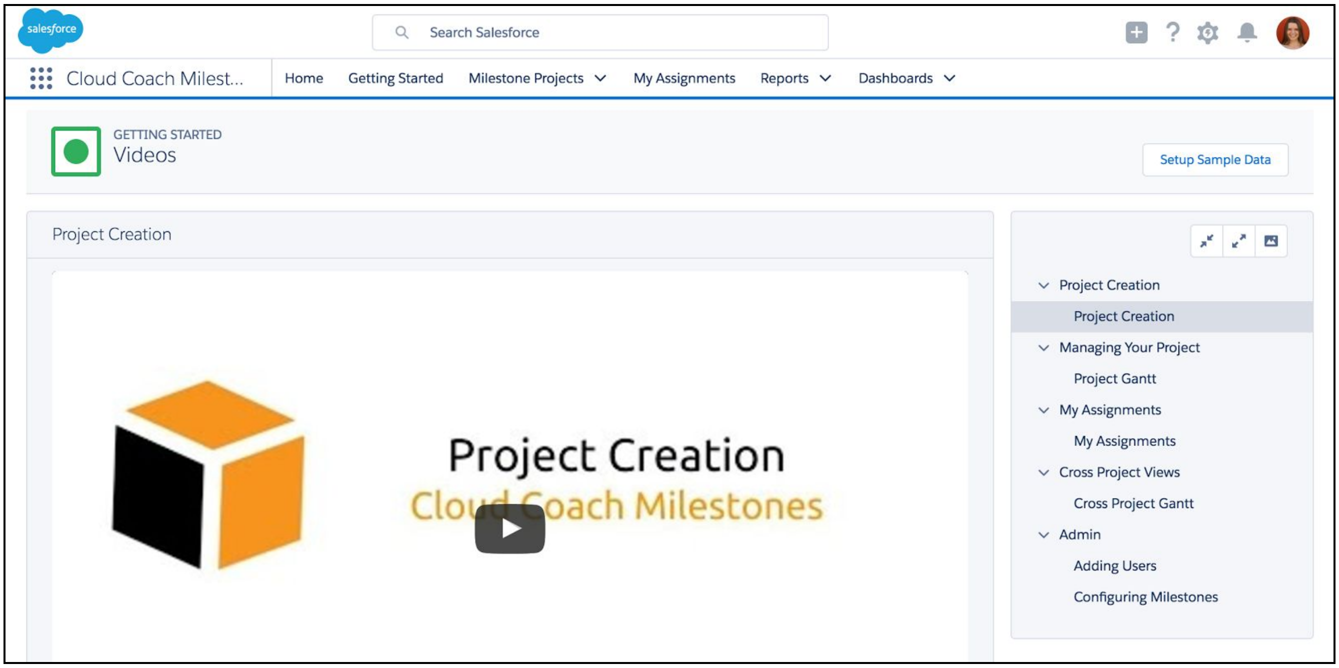
cloud coach

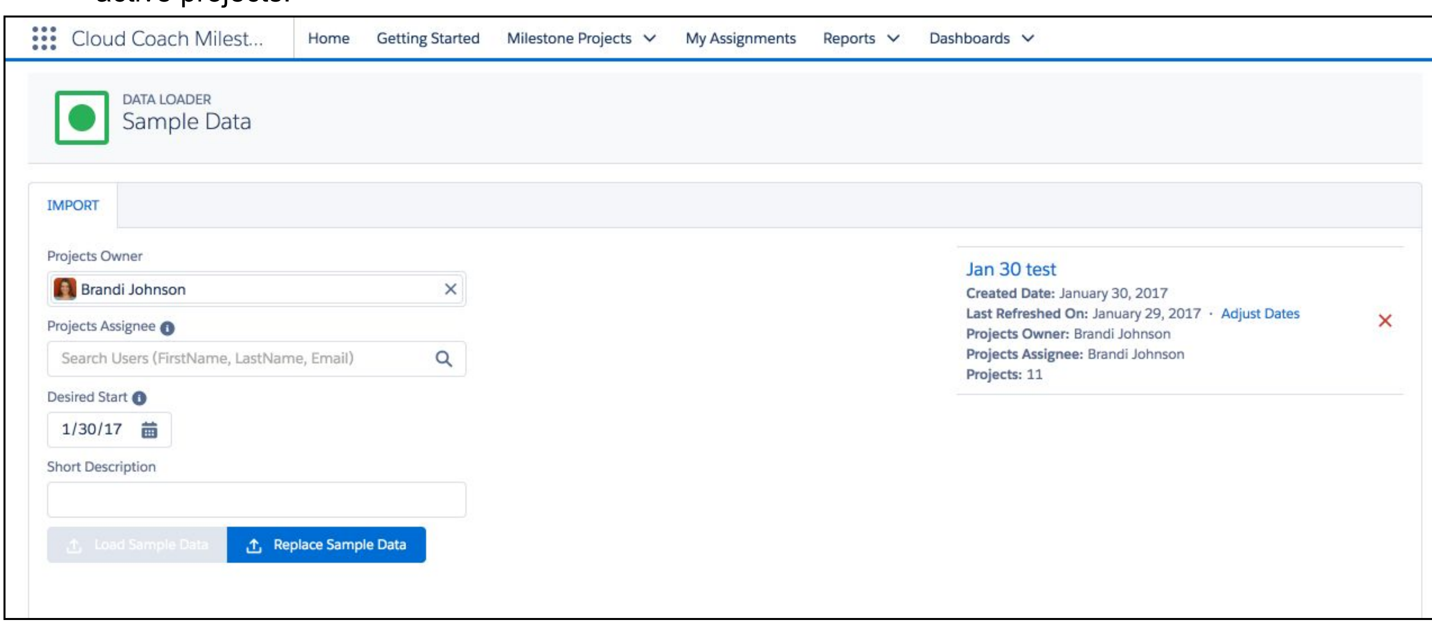
Demo Click Path Template

PRE-DEMO

1. Load Sample Data
    a. Start on the ‘Getting Started’ tab (This tab also includes training videos for end-users)
    b. Click on “Load Sample Data” in the upper right hand corner.



    c. 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.

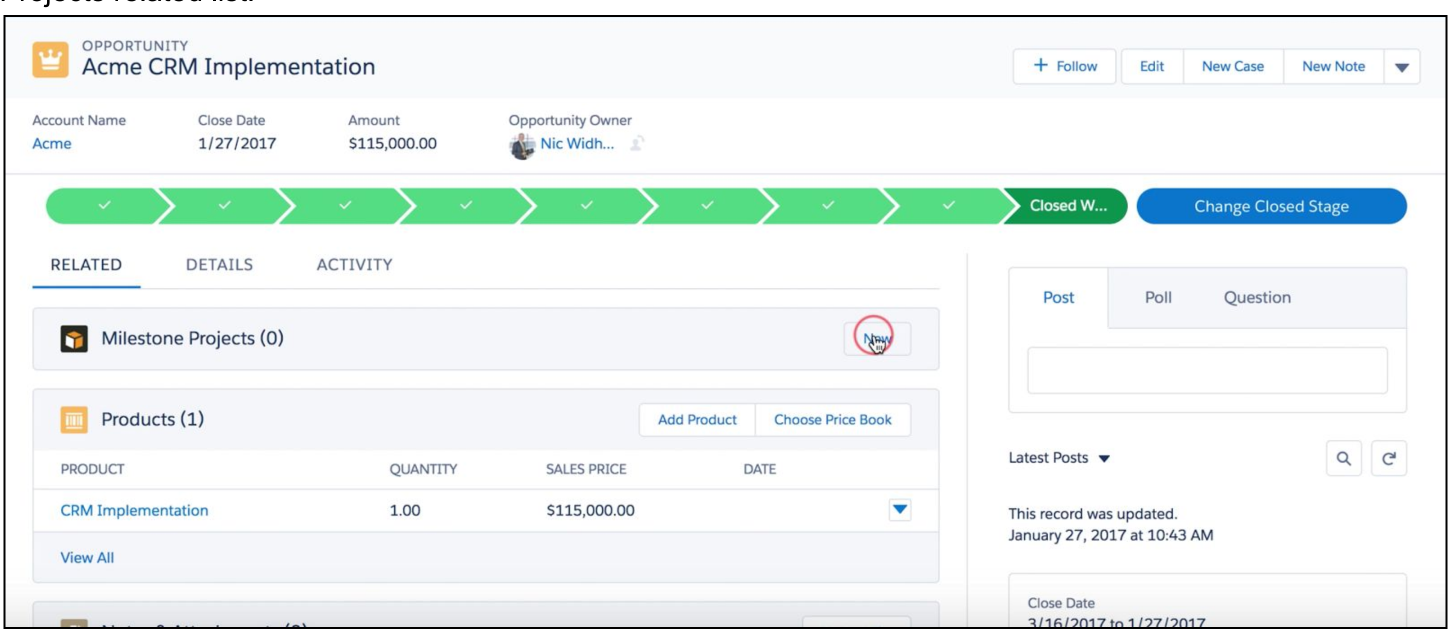
ii. Refresh Sample Data - *This will replace any existing sample data you have loaded, including any customizations to projects, task assignments, and dependencies. This is a good option if you want to essentially start from scratch.*
   1. Select Project Owner: Set as yourself
   2. Projects Assignee: 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.



Project Creation Method 1:

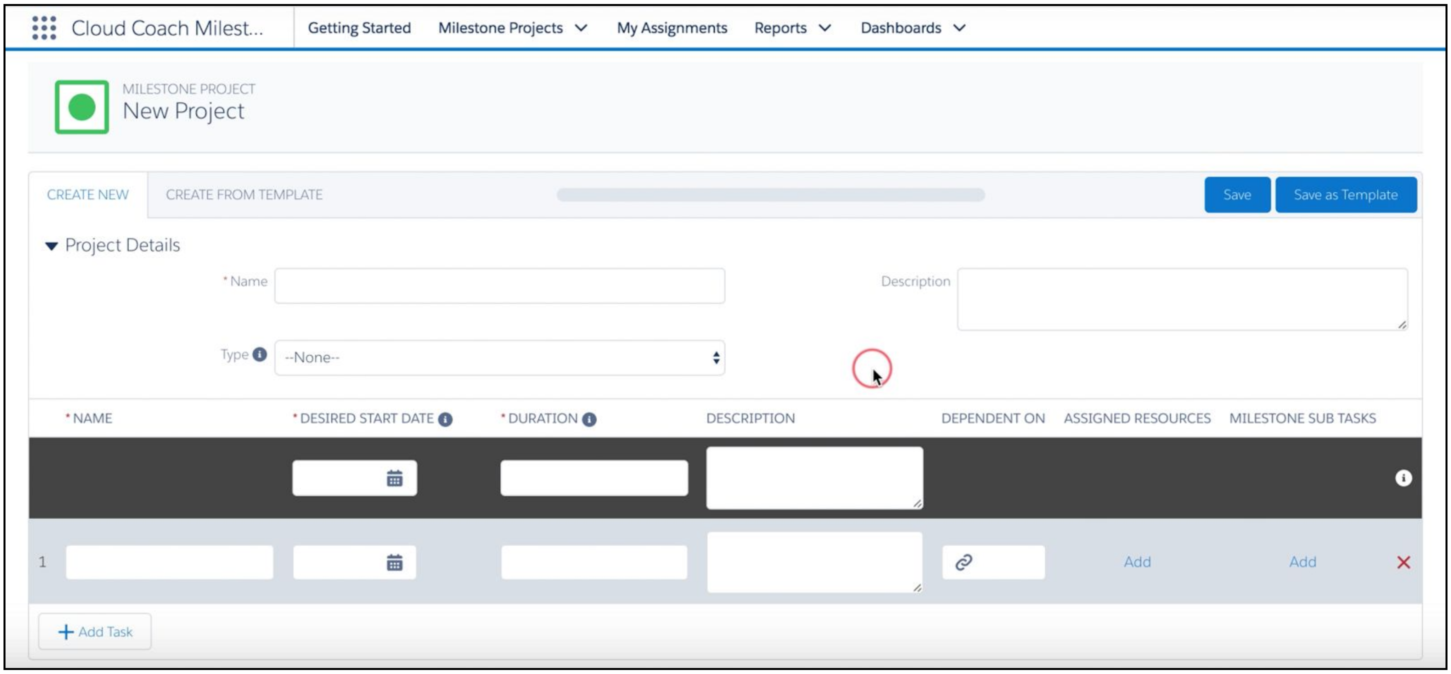
[__] Create New - Only required field is Project Name.

[__] 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

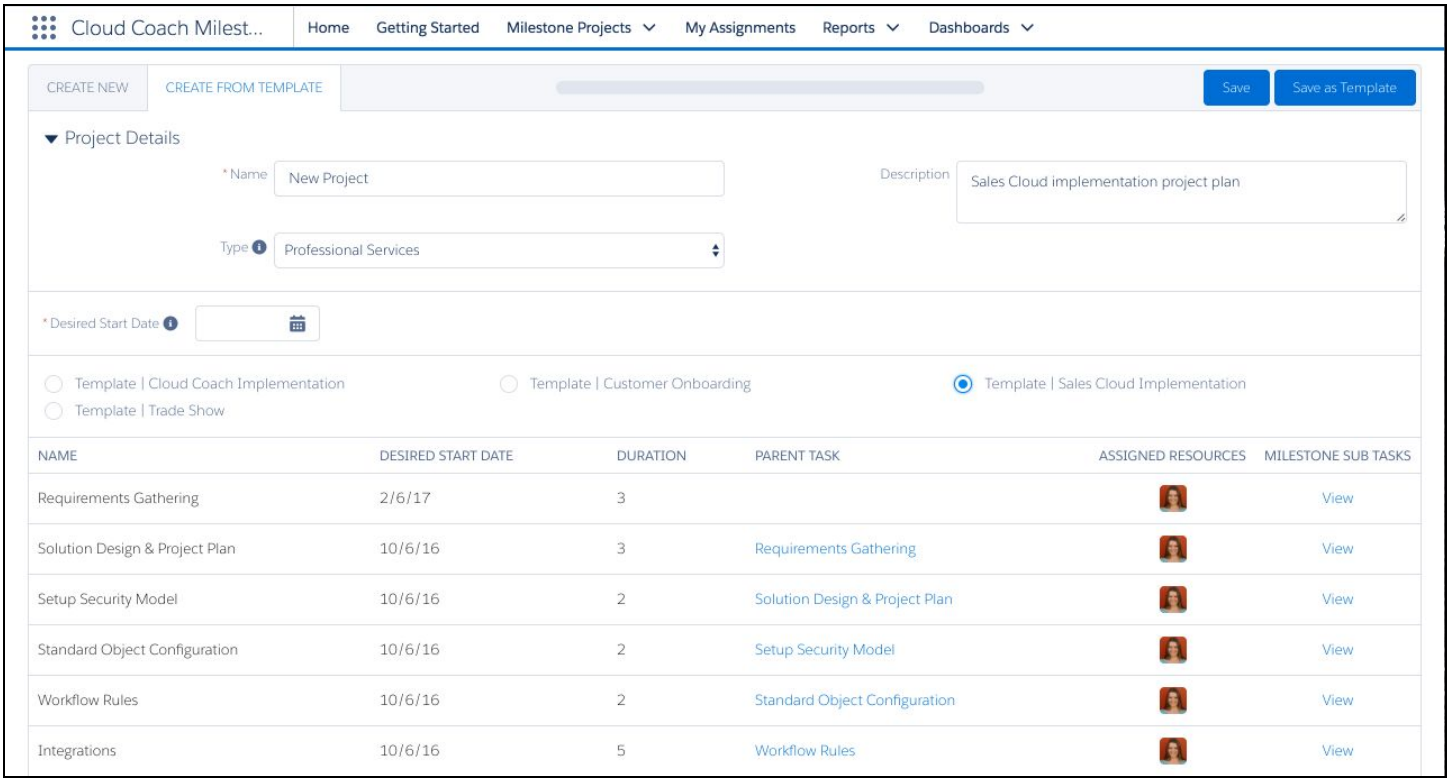


Project Creation Method 2:

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

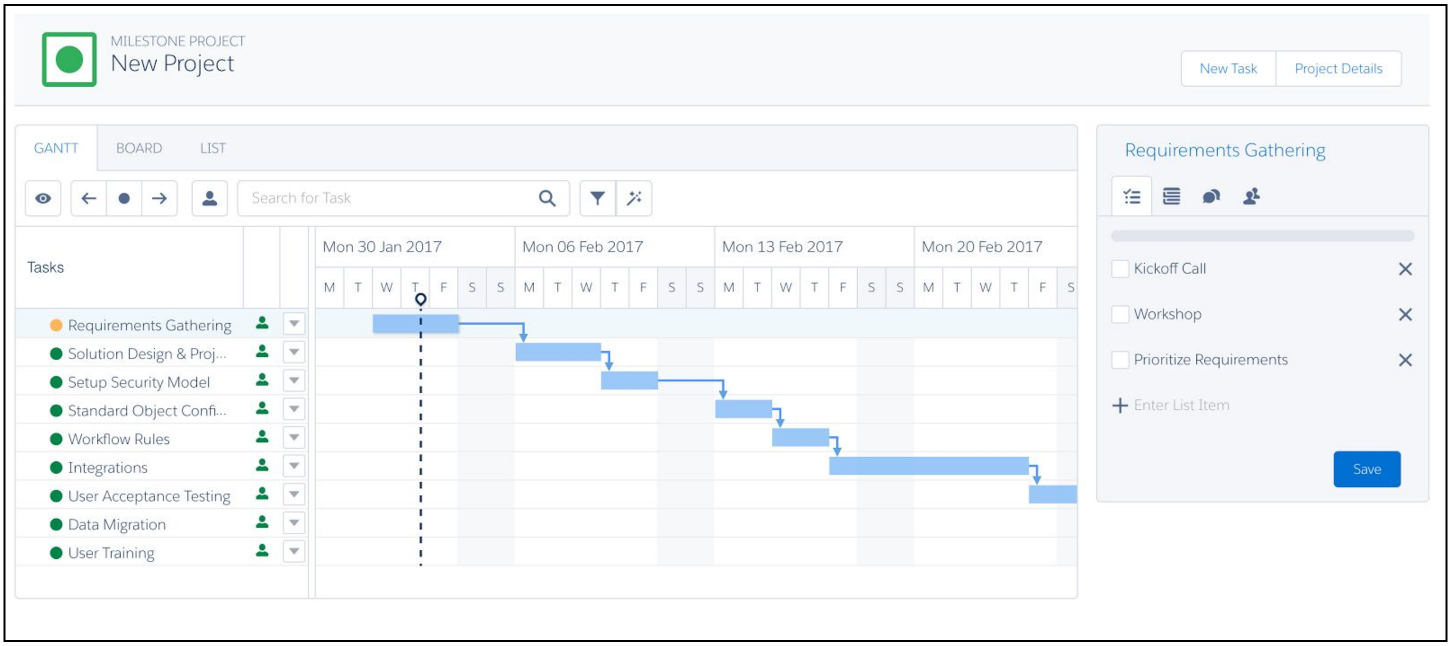
[__] Select your template - Sales Cloud Implementation. Automatically carries over tasks, durations, dependencies, assigned resources.

[__] Set your project name & desired start date



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

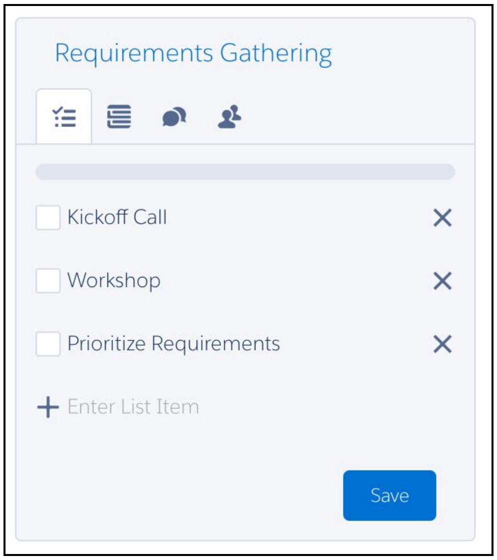
[__] View subtasks on any task

Completion of subtasks drives the completion of the whole task.

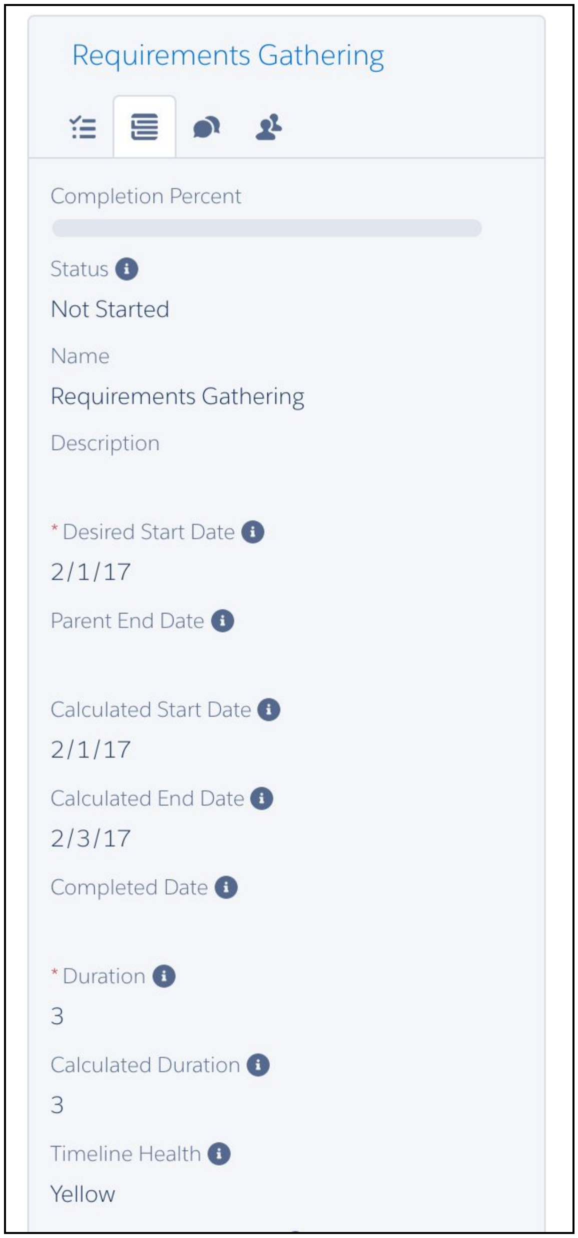
[__] Add subtasks

[__] Complete subtasks

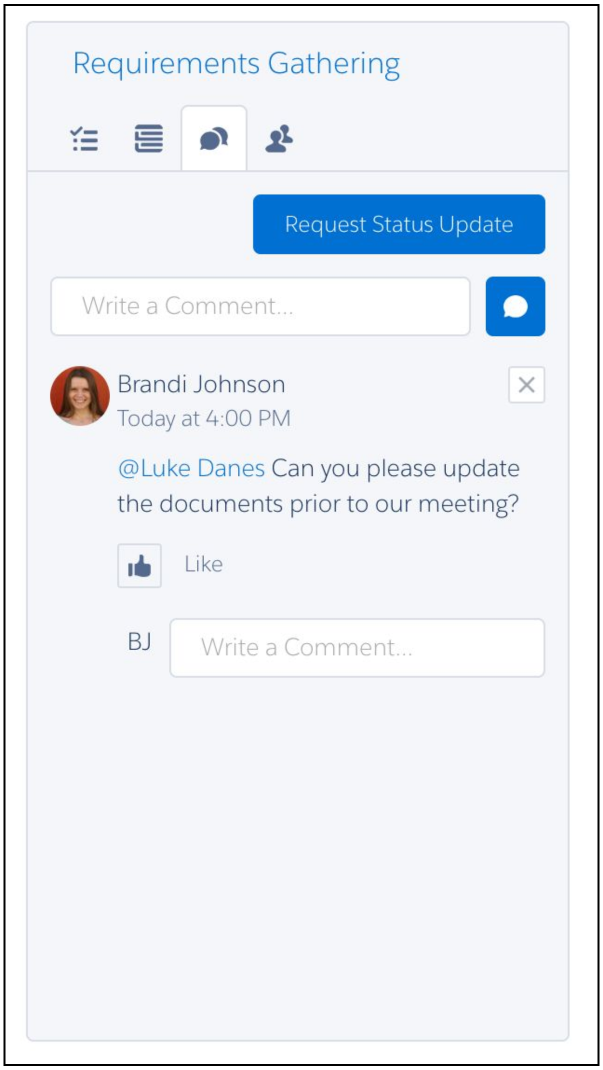
[__] Complete task early to see how project timeline changes



[__] 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.*



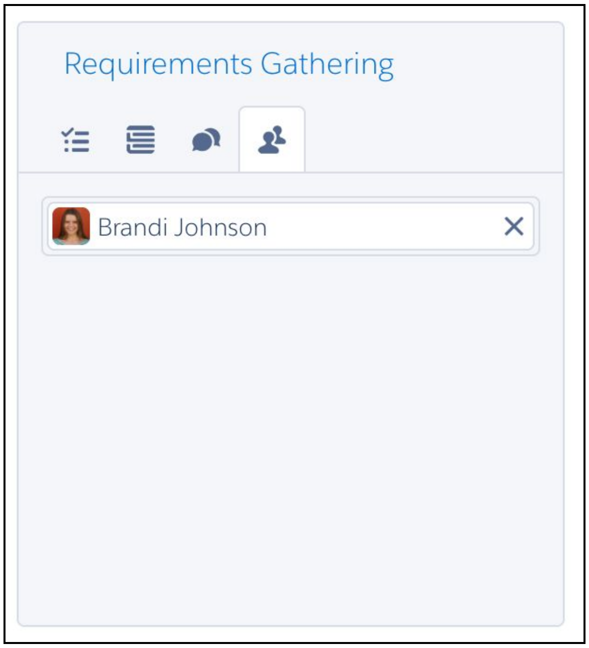
[__] Chatter - @ mention team members and see discussion



[__] Assignments

[__] See who is assigned to work on the task

[__] Change task assignment



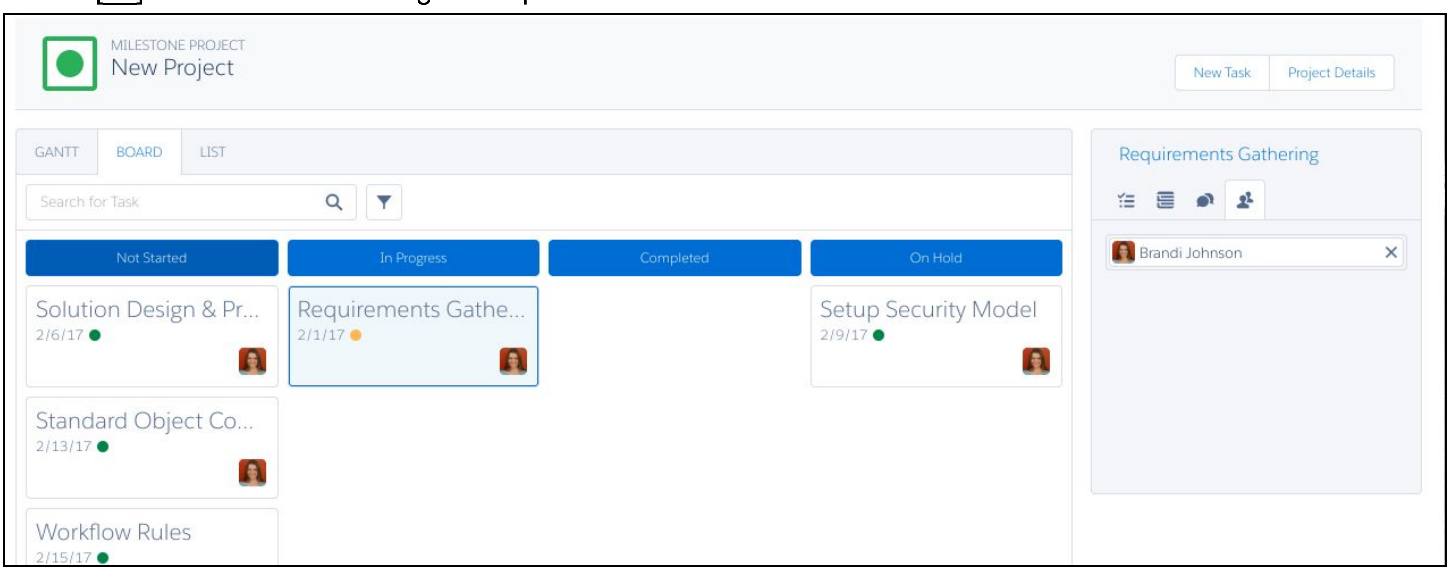
Project Management Views

By default, will go to timeline or Gantt view

[__] Board view

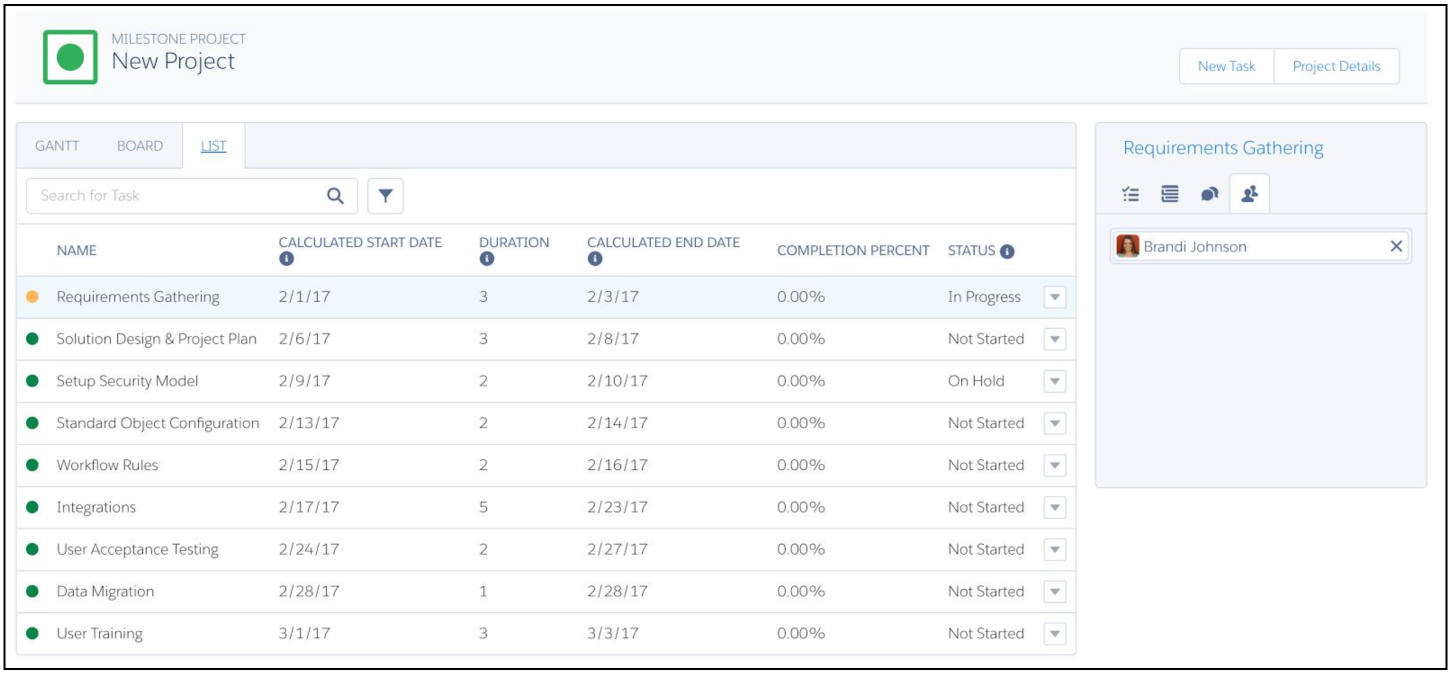
[__] Drag and drop cards to change status

[__] Still use same management panel



[__] List view

[__] Still use same management panel

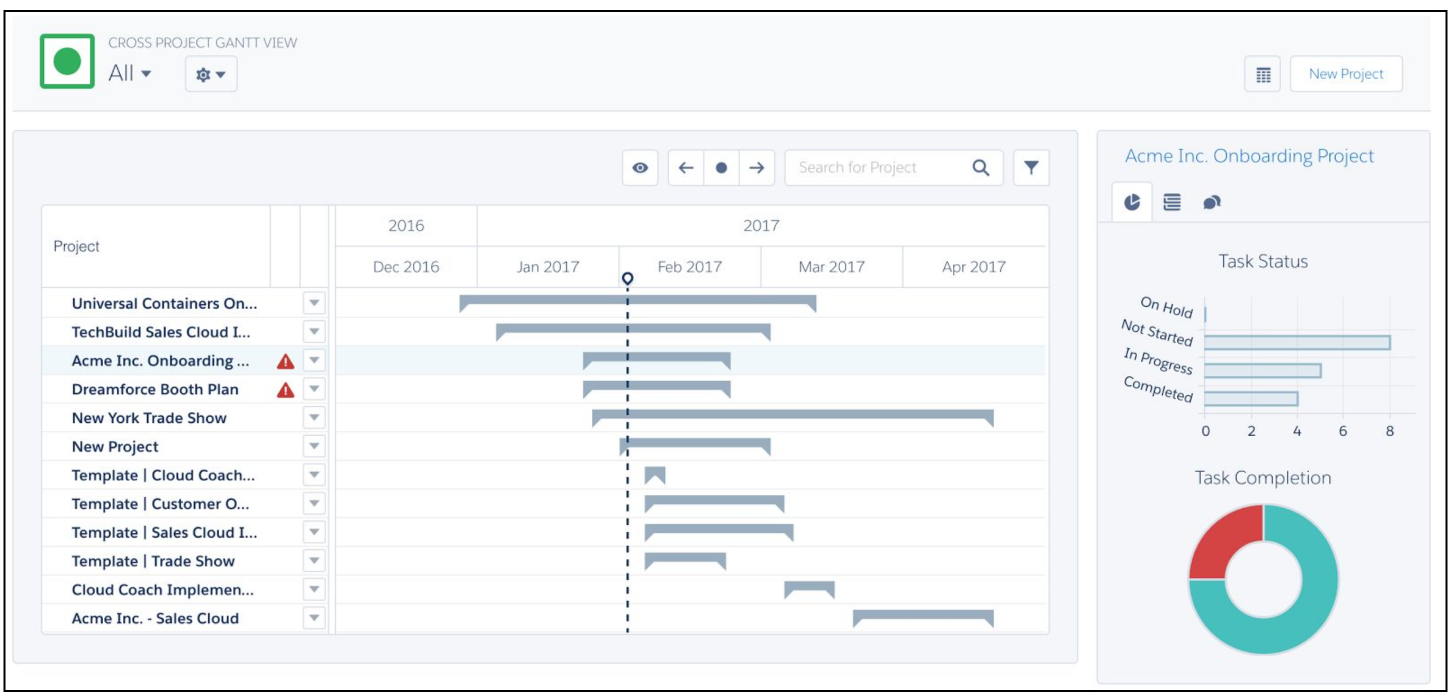


Cross-Project Gantt View

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

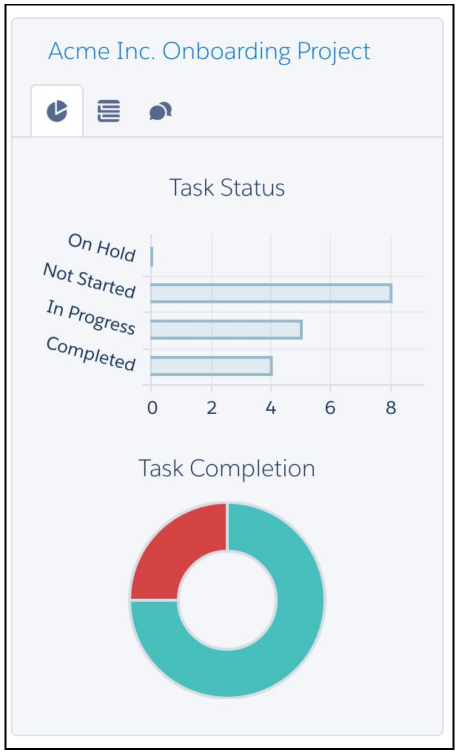
[__] Project Templates

[__] My Projects



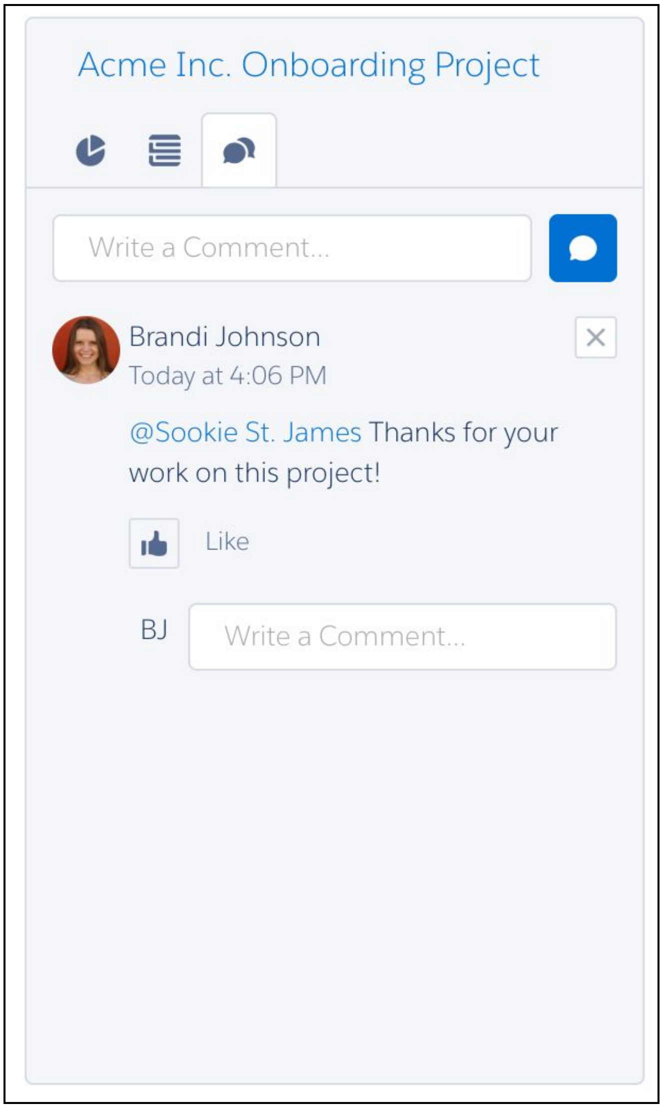
[__] Management panel

[__] Charts view - at a glance insights into project performance like task completion



[__] Project Details

[__] Project Chatter

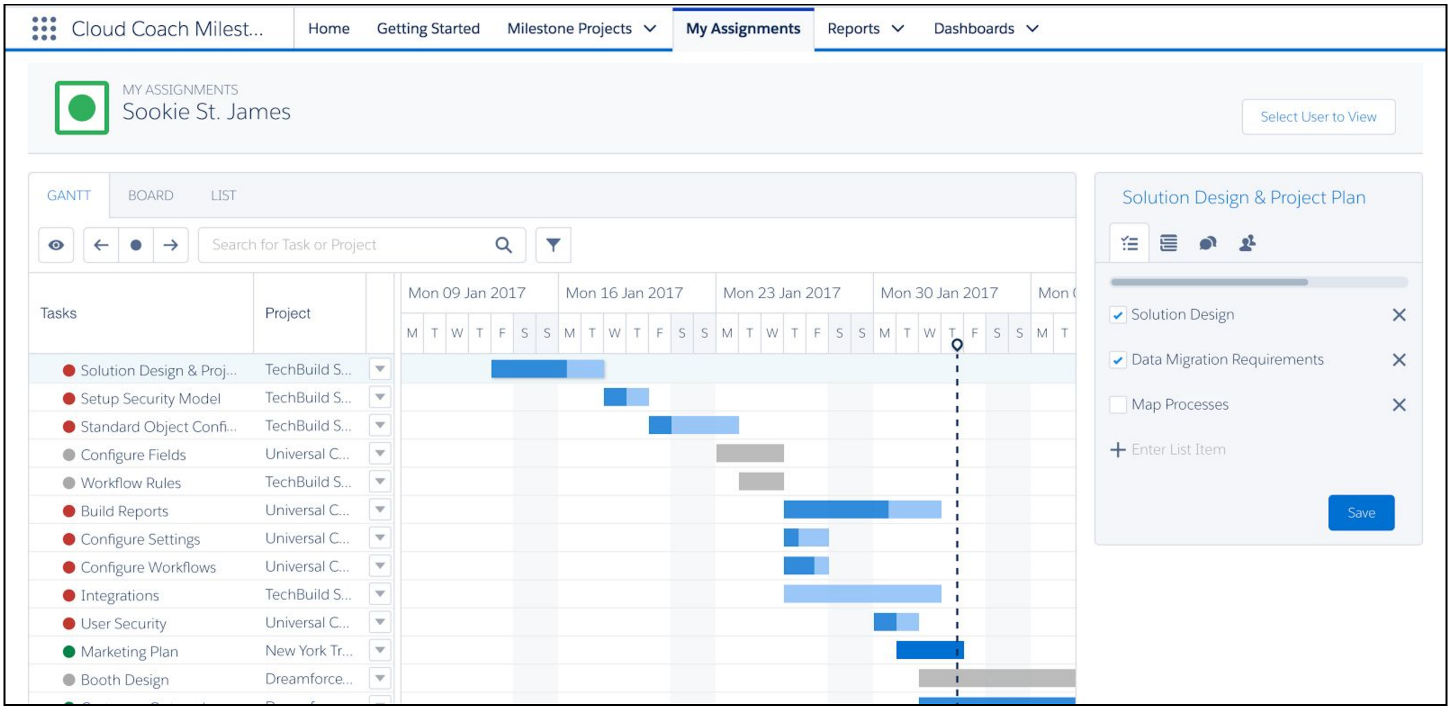


[__] Double Click on any project name to open individual project view

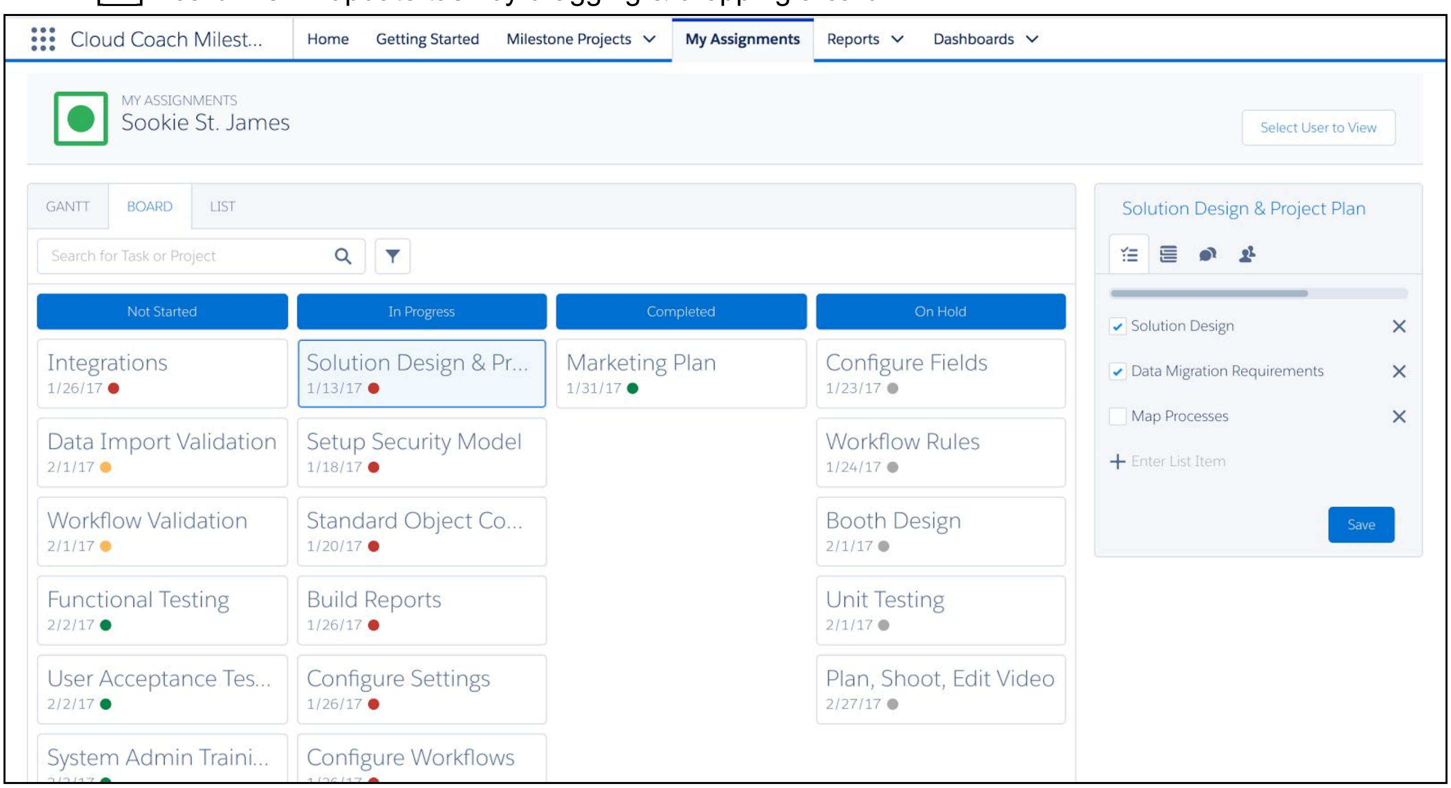
User View

[__] 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.

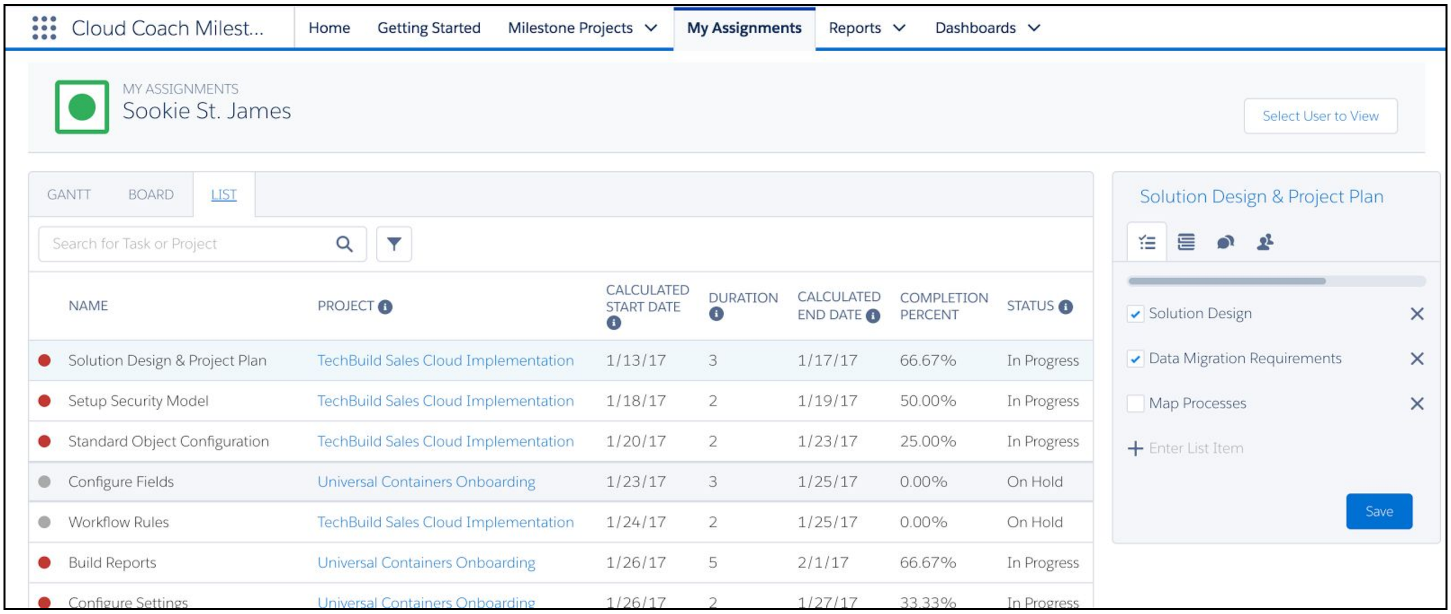
[__] Timeline view



[__] Board View - update task by dragging & dropping a card



[__] List View



[__] 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.