

Installation & Configuration Guide

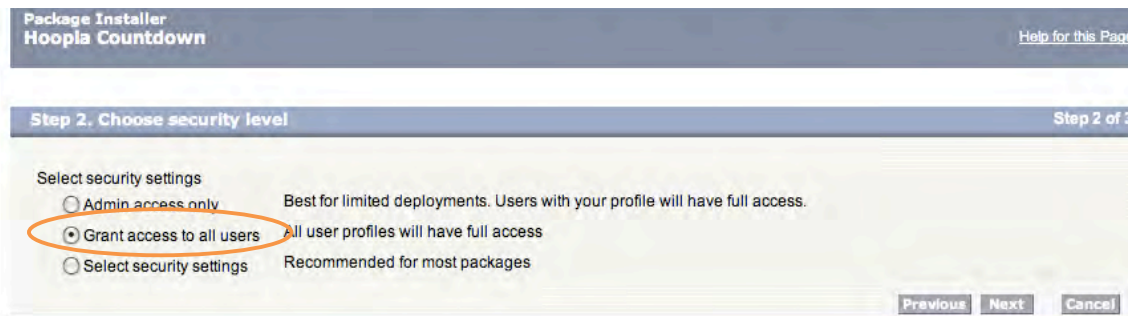
Congratulations on choosing Hoopla Software’s Countdown. You’ve taken the first step in creating a sense of urgency within your sales organization. There are just a few steps you must take to make Countdown available to your users.

Countdown Installation

Step 1: Click “Get it Now” from the Appexchange listing and follow the instructions on the screen.

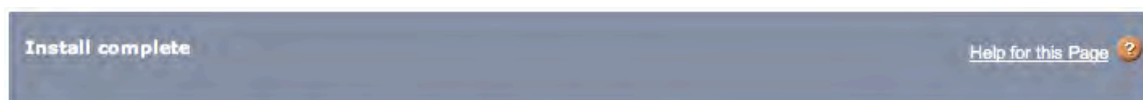
Step 2: Choose Security level.

In order to ensure that your users can view the countdown clock, you must grant access to all users. In a later step, you can restrict their access to the configuration functions.



Step 3: Click “Deploy Now”.

With Countdown, you can deploy and still test before making it available to users by waiting to add it to the general home page layout screens.



The components contained in this package have been successfully installed.

The final steps in the install process are to:

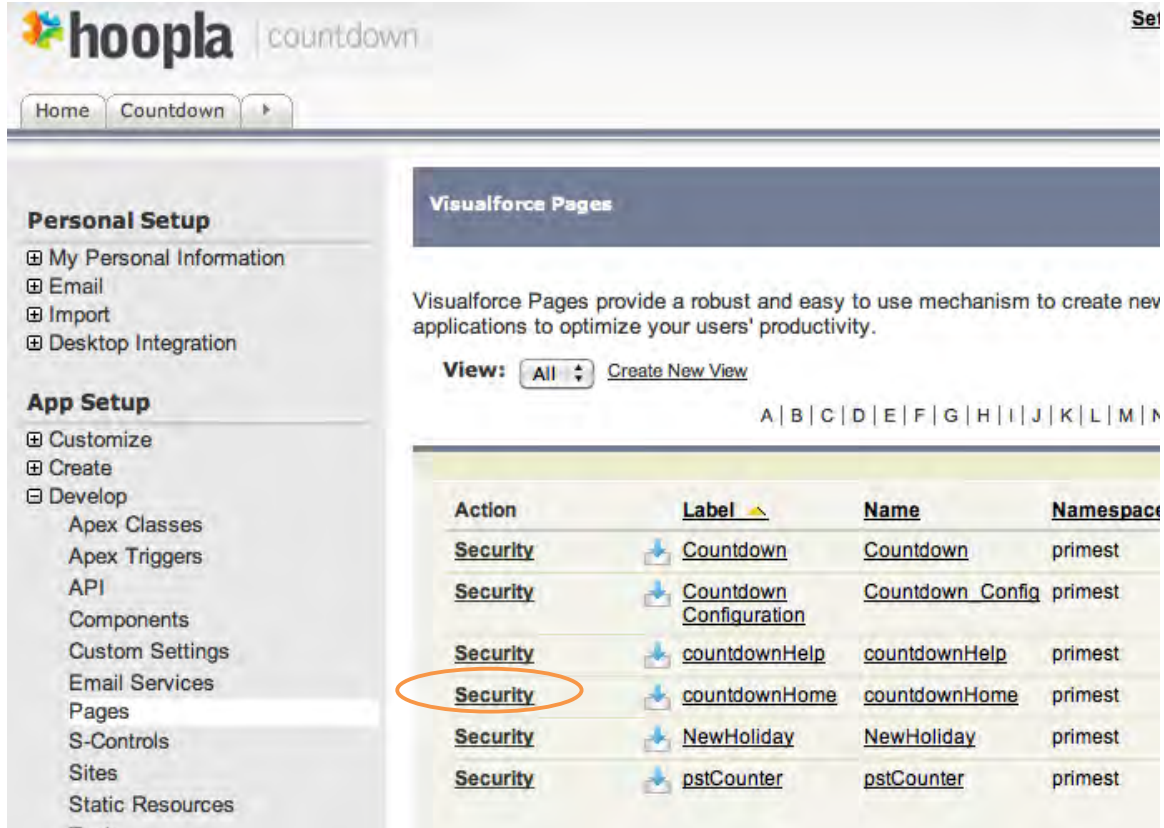
1. Change the visibility settings for any installed documents, reports, dashboards, letterheads, email templates, and custom fields on standard objects. By default, these components are visible to all users.
2. Set the Running User for any installed dashboards or analytic snapshots; by default, it is set to you.
3. Specify the appropriate recipients for any installed workflow tasks.
4. Specify the appropriate assignees for any installed workflow alerts.
5. Specify the appropriate user for workflow field updates that modify the Owner field or user lookups; by default, it is set to you.
6. Create a schedule for any installed analytic snapshots.
7. Configure any additional settings for this package from the package detail page.
8. Deploy the package by clicking Deploy Now below. You can also do this at any time in the future from the package detail page.

Deploy Now **Deploy Later**

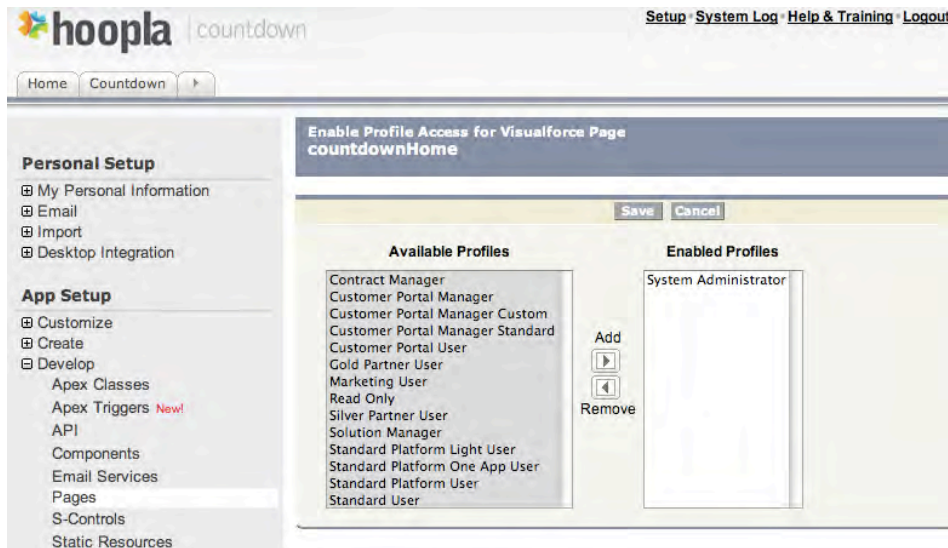
Step 4: Turn off access to configuration screens.

In order to restrict your users from being able to modify configuration settings, you must turn off access to a key Visualforce page called “countdownHome”.

Go to App Setup, Develop, Pages, and click “Security” next to countdownHome.



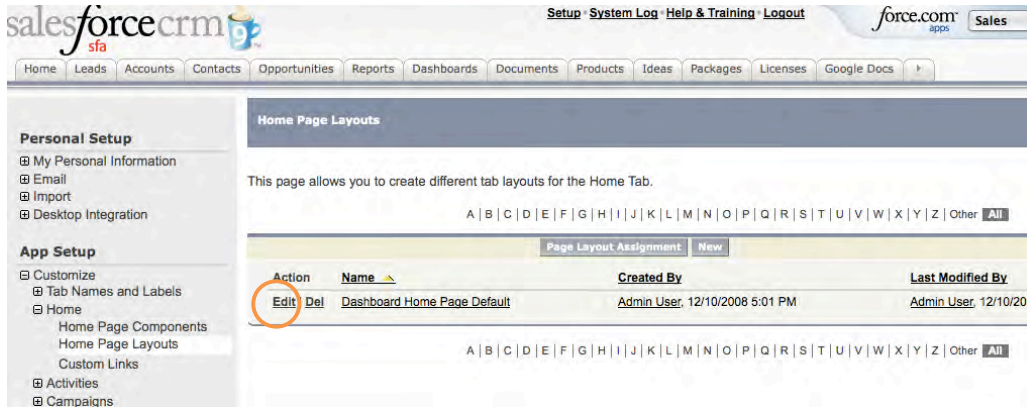
Next, move all profiles except System Administrator from “Enabled Profiles” to “Available Profiles” and click Save.



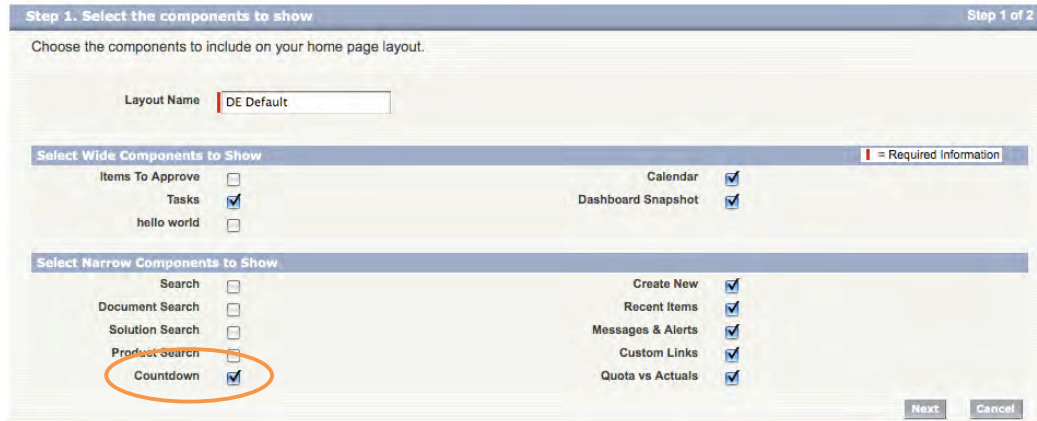
Step 5: Update Home Page Layout

In order for users to see Countdown on their sidebars, you must modify each home page layout that your users are assigned to include the Countdown component (Please refer to Salesforce Help & Training for guidance on page layout assignment).

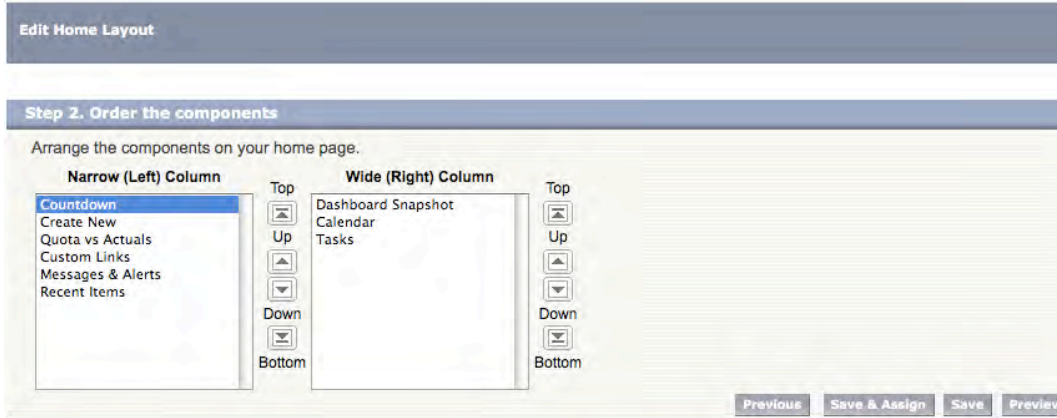
Go to “Setup” then under App Setup choose “Customize” then “Home Page Layouts” and select the layout you wish to modify and click “edit”.



Check the “Countdown” box and click “next”.

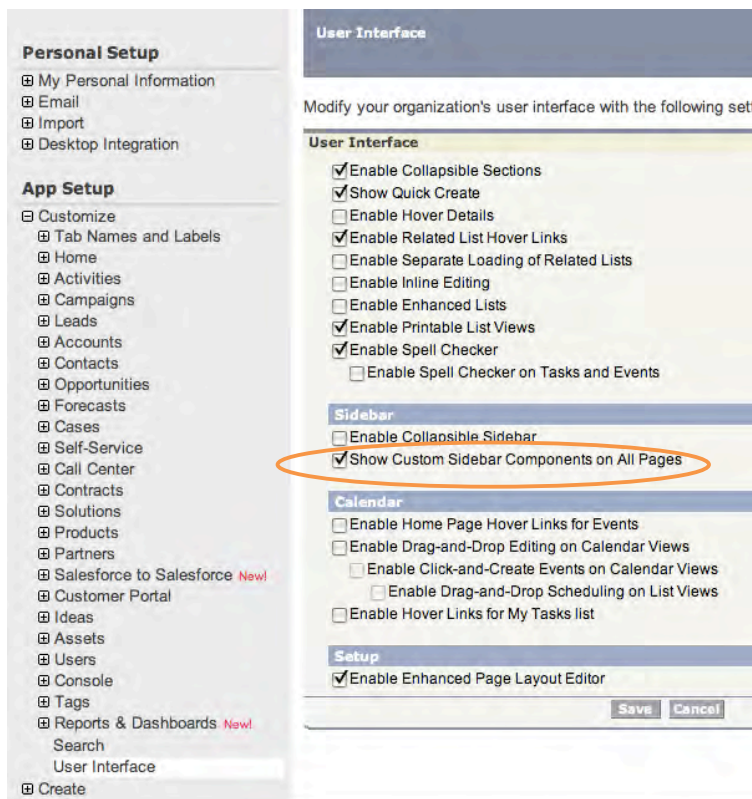


Countdown always appears on the Narrow (Left) Column. Move Countdown to the desired position on the column (our recommendation is at the top) and click “save”.



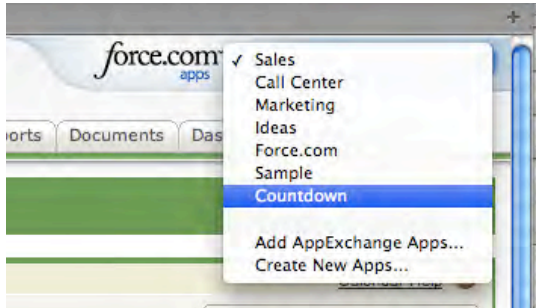
The next time your users refresh their Salesforce screen, Countdown will appear.

** If you want Countdown and all of your custom sidebar components to show on every Salesforce.com page and haven't already done so, you can go to Setup, App Setup, User Interface and check "Show Custom Sidebar Components on All Pages" under the Sidebar section.

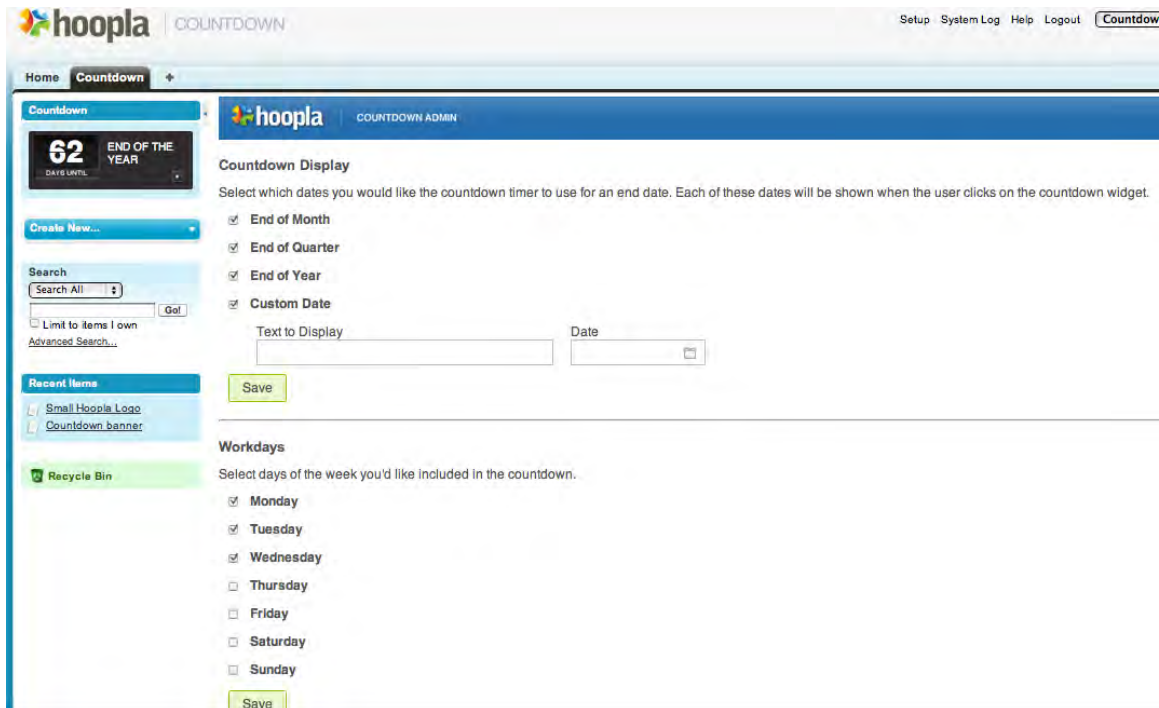


Countdown Configuration

Countdown is centrally managed by the administrator and can easily be deployed to hundreds and thousands of users with very few steps. To begin configuring Countdown, select the application from the drop down menu.



On the Countdown tab, there are 2 areas to configure:



Countdown Display determines what is displayed to the users. Just one choice can be selected to ensure that all users are viewing the same timeframe or users can be allowed to toggle between multiple choices. A custom date with custom text can be set for non-standard countdowns such as a product launch date or the beginning of a sales conference. (Be sure to hit the save button to save the changes.)

Workdays sets the standard company workdays. This keeps non-workdays such as weekends from being included in the remaining days count. (Be sure to hit the save button to save the changes.)

Days to Exclude

Set custom days that the countdown will exclude. You can set company holidays, etc.

Current Exclusions

10/31/10 - Halloween
12/25/10 - Christmas
08/19/10 - Pizza Day!
11/25/10 - Thanksgiving
09/06/10 - Labor Day

Add New Exclusion

Name Date

[+ Add Exclusion](#)

Days To Exclude determines any additional days to be deducted from the countdown. Company holidays and other non-work days can be entered to ensure that the correct number of remaining days are displayed.

The Countdown User Experience

Once Countdown is installed and configured, each user should see Countdown showing them exactly how much time they have left in the selling period.

Users can select the sales period they want displayed by clicking on the arrow that toggles the display between all of the options selected by the administrator.



For additional support or to submit ideas and suggestions, check out our support site at <http://getsatisfaction.com/hoopla> or send an email to support@hoopla.net. You can also call us at 888-748-1960.



Hoopla Software was founded to create tools and applications that improve the effectiveness of sales teams. Hoopla Countdown is designed to create the proper sense of urgency within the entire sales organization and Hoopla Performance makes sales projections much clearer and easier to manage. Watch for other useful applications coming soon from Hoopla Software.

