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The following updates have been made to DealSheet

**Version:** 2.25

**Updated:**

1. **NEW: DealCoach.** This is a guided opportunity review process aligned with DealSheet for managers to use to help them to structure reviews and capture ratings/notes. Data from DealCoach is available with opportunity and DealSheet data in reports and dashboards.
2. **NEW: Resource Links.** This allows superusers to assign a URL link to each question used in DealSheet which can be used to house specific sales enablement materials on a user support page. This url can be any URL for your company intranet or public internet. Links open in a new browser tab.
3. **Updated labels for fields:** the following page labels have been updated. the functionality of the pages remains the same.
  - a. Activity → Closure Plan
  - b. Criteria Map → Buying Criteria (this has also changed order in this menu)
4. A few minor bug fixes.
5. The User guide and videos available from the app, and the [implementation guide](#) for admins, have been updated to reflect the changes.

**Upgrade package link**

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0I0000016EhC>

**Notes for upgrade process:**

The following process should be used to upgrade to this version

1. Use the link to update the package for Admins only. Remember: do not unpack additional information.
2. ***If you are planning to use the resources link on the questions:***

As the admin you must add the field “Resource page link” to the page layout for DS Questions. This will enable the superusers to add a single resource link to each question. Adding a link is optional. As shown below

The screenshot shows the 'Details' tab for a question named 'RECOGNISED PAIN GAIN'. The form includes the following fields:

- \* Question Name: RECOGNISED PAIN GAIN
- Section: Why Buy
- \* Display Order: 1
- \* Weighting: 12
- Is Active: ☒
- Help Text: When there is some pain or possible gain the customer accepts in relation to their business they may be open to... (text is partially obscured)
- Resource page link: <https://oism.co.uk>
- Created By: David Smith, 15/01/2019 12:27
- Last Modified By: David Smith, 15/01/2019 12:27

Buttons for 'Cancel', 'Save', and 'Submit for Approval' are visible at the bottom.

### 3. *If you are NOT planning to use the DealCoach capability:*

Navigate to the app “Deal Sheet set up” and toggle the checkbox off for “Allow users to use the DealCoach tab” as shown below

The screenshot shows the 'Deal Sheet Set Up' page. It includes the following content:

- For Upgrades do not follow this installation process and do not unpack your data. This will overwrite your existing question data!**
- Welcome to Deal Sheet**
- Soon you will be using this application to win more of the opportunities you pursue. There is a short installation process to complete before you can get started.
- 1. Do you want to use our templated Reports and Dashboards?**  
If so please use the link to install them into your org BEFORE you move on to the next step > <http://oism.co.uk/dealsheet/reports-dashboards/dealsheet-dashboards-packages>
- 2. Once you have installed the dashboards (if required) unpack the application data and have this added to your Salesforce org.**  
This unpack process will add all of the questions, answers and other information that helps the application to work. To do this now click the button below:
- UNPACK** button
- Allow users to use the Timeline tab** ☒
- Allow users to use the DealCoach tab** ☒
- Next in the set up is the setting up of the licenses and page layouts for Deal Sheet.**  
Further information on configuration installation for each of these can be found in the 'Installation guide'. You can find this on our website at <http://oism.co.uk/dealsheet/support/dealsheet-university-guides> (registration required)
- Finally, for some it will be important to customise the application to your specific needs.** This may require that you change or add questions, weightings, answers or scores. Further details on how to do this can be found in the 'Administrators guide'. You can find this on our website at <http://oism.co.uk/dealsheet/support/dealsheet-university-guides> (registration required)
- If we can help get you set up please call us on +44(0)3333 444 015.

### 4. *If you want to customise the DealCoach guidance notes:*

Follow the process defined in the Dealsheet installation guide to change and customise the user guidance notes for DealCoach users. [Find that information here.](#)

5. ***If you want DealCoach data to be available for reports and dashboards:***

Create a Report Type to include Opportunity + DealSheet + DealCoach. Select the A/B toggles you need but be sure to include all three.

Be sure to check the report page layouts to include fields you want to report on. The report type page looks something like this:

**SETUP**  
**Report Types**

Edit Custom Report Type  
Opps, DS and DC

Changes you make to this report type will affect existing reports created from it.  
We recommend that you clone any report type you wish to edit, rather than change a working report type.

**Object Relationships** [Save] [Cancel]

This report type will generate reports about Opportunities. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

**A Opportunities**  
Primary Object

**B Deal Sheets**  
A to B Relationship:  
☐ Each "A" record must have at least one related "B" record.  
☒ "A" records may or may not have related "B" records.

**C DealCoach**  
B to C Relationship:  
"B" records may or may not have related "C" records.

(Click to relate another object)

[Save] [Cancel]

Following this activity, the application will be upgraded and new functionality available

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