prezentor.^{2.0}

Salesforce. Setup extra fields for Prezentor meetings

1. Click 'Settings'		
All 👻 🔍 Search Salesforce		🗟 🖬 ? 🔯 🖡 🐻
Contacts 🗸 Campaigns 🗸 Dashboards 🗸 Reports 🗸 Chatter Gr	roups 🗸 Calendar 🗸 People 🗸 Cases 🗸 Forecasts	. /
As of Today 09:18:13	Assistant	
	> 🔀 New lead assigned to you today Bertha Boxer	× V
	> 📩 New lead assigned to you today Jeff Glimpse	×
	New lead assigned to you today Brenda Mcclure	×
ere to view your performance.	New lead assigned to you today Carolyn Crenshaw	×
	> Rew lead assigned to you today Pat Stumuller	2 ×
2. Click 'Service setup'		
Q. Search Setup		🔄 🗄 ? 🔯 🜲 🐻
HERE THAN FOR FERREN THE FERRENCE THAN THE		Service Setup
		Setup :e 🔻
		Developer Console
		View All
	See how Service Cloud Basics If	r customers happy.
3. Click 'Object Manager'		
	Q Search Setup	
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Borne Object Manager		FILES ILLET AVAIL
Q. Quick Find		
Service Setup Home	lome	
ADMINISTRATION		
Users		
Channels		
Omni-Channel		-
PLATFORM TOOLS	20	
> Custom Code	Add Your Users	Customize Case Sta
Add your team to Ser	rvice Cloud in this simple setup flow.	Track and streamline your ager

4. Click 'Activity'

SETUP Object Manager 38 Items, Sorted by Label	
LABEL	API NAME D
Account	Account
Activity	Activity
Asset	Asset
Asset Relationship	AssetRelationship
Campaign	Campaign
Campaign Member	CampaignMember
5. Click 'Field & Relationships'	Q Search Setup
Details Details Fields & Relationships Description Buttons and Links Description Object Limits API Name Object Layouts Custom Singular Label Activity Activity Plural Label Activities Description	Enable Reports Track Activities Track Field History Deployment Status Help Settings Standard salesforce.com Help W

6. Click 'New'

	Sa sharan			S. 254 111-	
			Q Quick Find	New Field Depender	ties
FIELD NAME	DATA TYPE	CONTROLLING FIELD	1	NDEXED	

7. Select 'Picklist'

Service Setup Home	o Object Manager 🗸		
SETUP > OBJECT MANAGER Activity	1995 - Huar - 1995 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -		
Details Fields & Relationships	CLookup Relationship	Creates a minimal proved into this object to another object. The minimonship field allows sames to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list. Creates a minimonity that links this object to an external object whose data is stored cubide the Satesfronco org.	
Buttors and Links Object Limits Search Layouts	Checkbox Currency Date Date Date Email Celocation Wember Prevent Provent Provent Provent Provent Provent Company Provent Company Compa	Alives aues to setter 2 hose (hose address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives aues to setter 2 hose (address of princip) Alives (address of princip) Alives aues to setter 2 hose (address of princip) Alives (address of princip)	
8. Click (Nexť		
O Picklist		Allows users to select a value from a list you define.	
OPicklist (Multi-Select)		Allows users to select multiple values from a list you define.	
OText	Allows users to enter any combination of letters and numbers.		
O Text Area		Allows users to enter up to 255 characters on separate lines,	
Text (Encrypted)		Allows users to enter any combination of letters and numbers and store them in encrypted form.	
Time		Allows users to enter a local time. For example, "2:40 PM", "14:40:0", and "14:40:50.600" are all valid times for this field.	
		Allows users to enter any valid website address. When users click on the field, the URL will open in a separate bowser window.	
		Next Cancel	

9. In input 'Field label' enter 'Prezentor_meeting_status' (without brackets)

New Custom Field		
Step 2. Enter the details		
	Field Label Prezentor_meeting_stati	
	Values O Use global picklist value set	
	Enter values, with each value separated by a new line	
	None 3	
	Rienlaw values sinkshatinativ, not in the order entered	

10. Select radio button 'Enter values, with each value separated by a new line'

Field Label	Prezentor_meeting_stati
Values	Use global picklist value set Enter values, with each value separated by a new line
	Display values alphabetically, not in the order entered Use first value as default value

11. In field 'Values' enter text:

In progress Completed Cancelled

Planned

Values	Ester values, with each value concreted by a new li	lina
	Cinter values, with each value separated by a new i	
	In progress Completed Cancelled Planned	
		2

Display values alphabetically, not in the order entered

12. Click 'Next'

		1

13. Click again 'Next'

Step 3 of 4
Previou Next Cancel

14. Click 'Save & New'

	Step 4 of 4	
	Previous Save & New Save Cancel	
15. Select 'URL' (on page 'Field & Relationships')		
	rector double to other any complication of letters and numbers.	
O Text Area	Allows users to enter up to 255 characters on separate lines.	
O Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in	
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", a	
O URL	Allows users to enter any valid website address. When users click on the field,	



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16. Click 'Next'
Next
17. In input 'Field label' enter 'Prezentor_presentation_pdf1' (without brackets)
Field Label Prezentor_presentation_ i
18. Click 'Next'
Step 2 of 4
Previous Next Cancel
19. Click again 'Next'
Step 3 of 4
Previous Next Cancel
20. Click 'Save & New'
Step 4 of 4
Previous Save & New Save Cancel
21. Select again 'URL' (on page 'Field & Relationships')
Text Area Allows users to enter up to 255 characters on separate lines.
Text (Encrypted) i Allows users to enter any combination of letters and numbers and store them in
Time Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00",
Allows users to enter any valid website address. When users click on the field, t



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22.	Click	'Next
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23. In input 'Field label' enter 'Prezentor_presentation_pdf2' (without brackets) Field Label prezentor_presentation i () 24. Click 'Next' 25. Click again 'Next' 25. Click again 'Next' 26. Click 'Save & New' 27. Select again 'URL' (on page 'Field & Relationships') 27. Select again 'URL' (on page 'Field & Relationships') 27. Select again 'URL' (on page 'Field & Relationships') 28. Click 'Save & New'	22. Click 'Next'	
23. In input 'Field label' enter 'Prezentor_presentation_pdf2' (without brackets) Field Label prezentor_presentation i 24. Click 'Next' 25. Click again 'Next' 25. Click again 'Next' 26. Click 'Save & New' 27. Select again 'URL' (on page 'Field & Relationships') 27. Select again 'URL' (on page 'Field & Relationships') 27. Select again 'URL' (on page 'Field & Relationships') 28. Click 'Save & New'		
23. In input 'Field label' enter 'Prezentor_presentation_pdf2' (without brackets) Field Label Prezentor_presentation : 24. Click 'Next' Step 2 of 4 Previous Next Cancel 25. Click again 'Next' 25. Click again 'Next' Cancel Next Cancel 26. Click 'Save & New' 26. Click 'Save & New' 27. Select again 'URL' (on page 'Field & Relationships') Cancel Next Next Cancel Next Next Next Next Next Next Next Next		Cancel
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26. Click 'Save & New' Step 4 of 4 Previous Save & New Save Cancel 27. Select again 'URL' (on page 'Field & Relationships') 10xt Text Area Allows users to enter up to 255 characters on separate lines. Text (Encrypted) Allows users to enter any combination of letters and numbers and store them in e Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40", and	Previous Next Cancel	
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27. Select again 'URL' (on page 'Field & Relationships') Text Text Area Text (Encrypted) i Time Allows users to enter any combination of letters and numbers and store them in end Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and Allows users to enter any valid website address. When users click on the field, the		
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Time Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", a URL Allows users to enter any valid website address. When users click on the field, the	O Text (Encrypted) i Allows users to enter any c	combination of letters and numbers and store them in e
O URL Allows users to enter any valid website address. When users click on the field, the	Time Allows users to enter a loca	al time. For example, "2:40 PM", "14:40", "14:40:00", a
	URL Allows users to enter any v	valid website address. When users click on the field, the



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28. Click 'Next'

	Next

29. In input 'Field label' enter 'Prezentor_presentation_pdf3' (without brackets)

Field Label	Prezentor_presentation_
0. Click 'Next'	
	Step 2 of 4
	Previous Next Cancel

31. Click 'Save & New'

	Step 4 of 4
	Previous Save & New Save Cancel
32. Select again 'URL' (on page 'Field	& Relationships')
U lext	/ norma applie to entry any complication or resold and normalized.
Text Area	Allows users to enter up to 255 characters on separate lines.
O Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00",
O URL	Allows users to enter any valid website address. When users click on the field, t

33. Click 'Next'

	Next



Field Label	Prezentor_pre	esentation_	i	
Click 'Next'				
			Ster	2 of 4

34. In input 'Field label' enter 'Prezentor_report_url'' (without brackets)

Previous Save & New Save Cancel

37. In Prezentor's backend or application click 'Sync with CRM'

User profile	Access rights	Email templates	Email settings	Agenda templates	Presentations	Integration
Select CRM Provider	ovider Select translation agency					
Salesforce CRM			Xplanation		J) ire	
CRM data			Translatio	on login		
			Please typ	e in your translation creden	tials	
Login			Username:	hs@wmt.dk		
 Enable synchronization 	n with CRM		Password:			
Sync exists emails and	meetings to CRM		Process coo	de:		
Sync CRM data						
Last synchronization: 12-0	6-2019 14:27					
					Cano	el Save