

Telecom and Cloud Services Agency Management (“TCAM”) installing TCAM in your Production Org.

Salesforce.com Best Practice is to install apps in a sandbox to ensure they are well suited to your needs. That is not always possible for a variety of reasons. We are providing you this document as a means to help you assess the implications of installing TCAM directly in your Production Salesforce.com org.

TelCloud Install and Setup is Included for Paid Customer - We do the work!

TelCloud includes the Installation and Setup listed in this document not otherwise noted as customization for our paid customers. If you are considering using TCAM, and wish to test it in either a Production org or in your Sandbox, without TelCloud assistance, you may do so. However, history shows that you will be best able to see the benefits of the Application with TelCloud directly involved in the implementation. With the low cost of the application we recommend you

What does TCAM Cost?

TelCloud’s Telecom and Cloud Services Agency Management is priced based on the Term Plan and the manner of payment. Contact sales@telcloud.biz for a quote.

Considerations for Installing TCAM in a Production org begins with understanding what a Managed Package is in Salesforce.

Understanding Managed Packages in Salesforce.com

For the full text of this section please see the Salesforce article [here](#).

Salesforce partners like TelCloud typically use Managed Packages to distribute and sell applications to customers. These packages must be created from a Developer Edition organization. Using the AppExchange and the License Management Application (LMA), developers can sell and manage user-based licenses to the app. Managed packages are also fully upgradeable. To ensure seamless upgrades, certain destructive changes, like removing objects or fields, can not be performed.

Managed packages also offer the following benefits:

- Intellectual property protection for Apex
- Built-in versioning support for API accessible components
- The ability to branch and patch a previous version

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- The ability to seamlessly push patch updates to subscribers
- Unique naming of all components to ensure conflict-free installs

For these reasons and others, installation in a Production org is allowed. It is the customer's decision whether or not to install in a Sandbox or Production org.

Whether or not you are installing TCAM for a test or for actual use, we recommend you contact us to assist you with the setup and configuration of TCAM. TelCloud is ready, willing, and able to complete all of the following for you. This work is included in the License Setup Fees.

TCAM Installation Process

Follow the steps listed on TelCloud's website. [Click here](#) to load the application.

Install in Production Org.

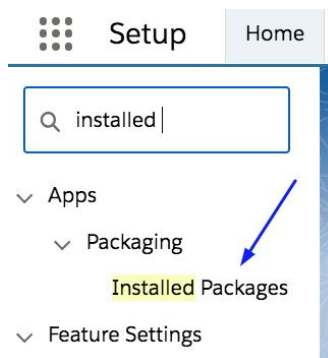
- If you install TCAM in production ***for a trial***, it is recommended that you select load for admin users. This way there will be no impact on others while testing.
- If you install TCAM in production for use, it is recommended that you select load for all users. This way the work of adding rights to the app is reduced. Follow all steps below or modify as best suited to your current Salesforce.com configuration. Contact Support@telcloud.biz for assistance.

TCAM Setup

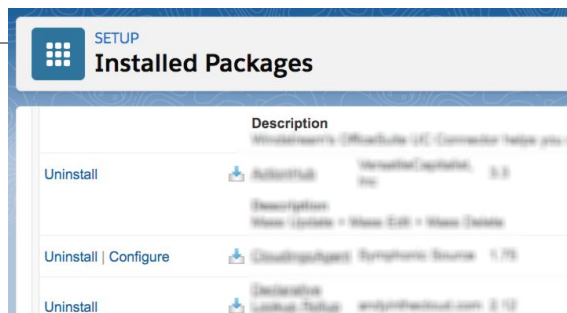
After installing the TCAM app you'll receive an email indicating it has installed successfully. After receiving the email login to your salesforce.com org.

Assign Users.

- Go to Setup / Installed Packages.
- Click on Installed Packages.



- You'll see a screen like this.



in your Production Org.
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[oud.Biz](#) for more information.
[l.Biz](#) for help with install and setup.

- Click the Add Users button
- Select the Users to add. A license is applied to each user selected.

Add one or more Permission Sets

If this is a test setup begin with the Admin Permission Set only

- Admin - Create a permission set for Admins called "TCAM Admin". Give it rights to everything in TCAM.
- Other Permission Sets are addressed below.

Set up of TCAM Commissions

TelCloud will set up the page layouts, functions, set account and opportunity record types, add the test suppliers, test agents, and test commission levels and rates. These and other commissioning capabilities will then be applied to the users with the appropriate TCAM permission set.

Setup of TelCloud Quoting

Typically the first process TelCloud customers want to be implemented is Commission processing. Quoting is a set-up intensive process. We recommend that you do this after the setup of the rest of the TCAM Commissions App is completed prior to setting up TelCloud Quoting.

As an overview only: TelCloud Quoting requires the setup of the following additional Custom Objects.

- Suppliers - creates the reference to allow selection of the supplier in the Quoting Process. (Lookup to the Supplier Account record).
- Offerings - List the product information that is included in the Supplier Quote Request. (Lookup to Suppliers object record. Lookup to the Supplier's Contact record.)
- Offerings Junction - Created=s a direct relationship between a Parent offering the child offering. This allows the insertion of add-on items automatically into the Supplier Quote Request.

The screenshot shows the 'Package Manager' interface with a 'SETUP' header. The main content area is titled 'Package Details' and 'TelCloud Telecom and Cloud Agency Management'. Below this is a table with the following data:

Package Name	TelCloud Telecom and Cloud Agency Management	Publisher	TCAM Development
Status	Active	Allowed Licenses	10
Expiration Date	Does not Expire	Used Licenses	3

Below the table is a navigation bar with 'A B C D E F G H I J K L M N O P Q R' and a 'Licensed Users' section with 'Add Users' and 'Remove Multiple Users' buttons.

TCAM Implementation Steps

TelCloud will do all of the following for you:

- Create all Page Layouts and apply them by user type, profile and/or permission set.
- Setup Supplier, Agent/Partner, Master Agent, and Customer account records by Record Type.
- Update the Opportunity layout to conform to commission processing requirements.
- Create Commission Levels and rates and assign them to the Agents/Partners.
- Add any custom naming you wish to identify the various Commission Levels and Rates needed and ensure the correlation between the Commission Level and Rates object, the Opportunity, and the Agent/Partner Account record.
- Add your suppliers in the Supplier record type.
- Add your Agents to the Agent account record type.
- Apply the correct Commission Levels to the Agents.
- Setup the Commissions Due and Bank reconciliation function that validates your supplier deposits versus what is reported in their commission import reports.
- Set up the Assets records for tracking the product and service inventory related to each account and opportunity.
- Setup Case records

Optional Set-Up Item

Optionally, you may set up the Supplier/Master Agent object. It is not needed for Commission processing and/or reporting.

- Setting up the Supplier /Master Agent object associates a supplier's product types with opportunities to allow granular a level of supplier commission payment validation.
 - Note: The creation of Business Processes, Flows, Workflows, Apex Triggers, Apex Classes, Visualforce, Actions or any other customer-specific method to attain the commission validation offered by this object is done as a customization and is not a part of the TCAM setup fee.

Leaving the optional setup mentioned above, the time-frame from loading to full usability is typically about a week. Again, we do this for you. It's part of the install charge.

Release to Users

To extend the application to your users, apply the appropriate TCAM Permission set to users needing access to the application.

It is a good idea to clone the initial TCAM Permission set and save it in one or more Permission Set variations. But you do not need to do this. All users can get access to some or all by their User Profile or other existing Permission sets that can be modified to allow access.

- You may want the initial Permission Set which has full access to everything to be applicable to Users who are management and/or admins.
- A second Permission set could be for Sales Reps so they have read/write access to the fields on objects that may relate to commissions.
- Another Permission Set could be for the Commission team granting them access to commission fields but not other objects and fields the Sales People use.
- And so on...

Here is an example comparing the Permissions for a Salesperson and a Commission Team member.

- The Opportunity fields Split Method, Compensation Levels and Rates, Agent or Rep Company, and Agent or Rep Contact are fields logically completed by the Sales Person or automatically by a Business Process or Flow, during the sale process.
 - Access to these fields would be dictated by the Sales Person Permission Set.
 - The salesperson may not need access to the more detailed Commission fields on the Opportunity.
- The Commission Team Permission set would let them see the fields they need but not sales-related fields of no concern to the Commission team member.

Once you define the Permissions you apply them to the Users they relate to. It's then fully implemented.

What if you decide Not to use TCAM after your trial?

If you're not pleased then you have no further liability. If TelCloud has done the install and setup for you, that fee is not refundable. Any charges paid for License fees paid will be refunded for the remaining period of the term.

How to delete the App.

To delete the TCAM APP use the standard salesforce function to delete an Installed Package. (Setup/Installed Packages del). That process allows you to delete an installed managed app such as TCAM with the option to keep or delete the data.

Once you've used the delete Installed Package function everything in TCAM from the page layouts to objects and APEX classes and triggers to Visualforce pages, everything in TCAM is gone. The last step would be to revert the record types on Account and Opportunity to your original record types. For more info on deleting a managed package see the [Help Article here](#).

That's why literally 100% of our agent and master agent customers have loaded it directly into production. Not one had an issue.

Just a reminder that we will do this all for you.

We will load it. Set it up. And teach you how to use it. That will help prevent your uninstalling it.

For more information: Support@TelCloud.biz.