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Note for Users

Per Call Plan adds a section to the Task and Events screens in Salesforce.com. All the user needs to do is to fill that section out as and click Save when done.

1. Pre Call Planning Sample Screen

This is the way it can look when you set it up. You can adjust the layout to your needs.

Call Plan

Objective of the call	<input type="text"/>	What 3 things do you want to learn?	<input type="text"/>
Outcome / Next Steps	<input type="text"/>	What 3 things do you want to convey?	<input type="text"/>
What do you want to ask for?	<input type="text"/>	What can you give?	<input type="text"/>

Send Notification Email

2. Editing the Page Layout for Tasks

The Layout is modified by going to: **Setup > Customize > Activities > Task Page Layout**

Click **Edit**.

Expand All | Collapse All

Quick Find

Force.com Home

System Overview

Personal Setup

- ▶ My Personal Information
- ▶ Email
- ▶ Import
- ▶ Desktop Integration
- ▶ My Chatter Settings

App Setup

- Customize
 - ▶ Tab Names and Labels
 - ▶ Home
 - Activities
 - Task Fields
 - Task Validation Rules
 - Task Triggers
 - Task Buttons and Links

Task Page Layouts

Task Page Layout

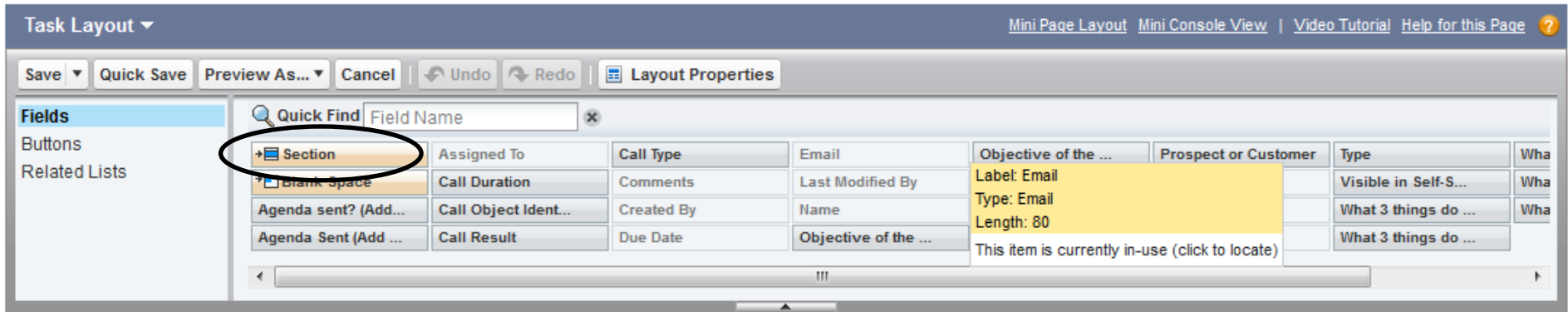
This page allows you to create different page layouts to display Task data. After creating page layouts, click the Page Layout Assignment button to control which page layout is used.

Task Page Layouts New Page Layout Assignment

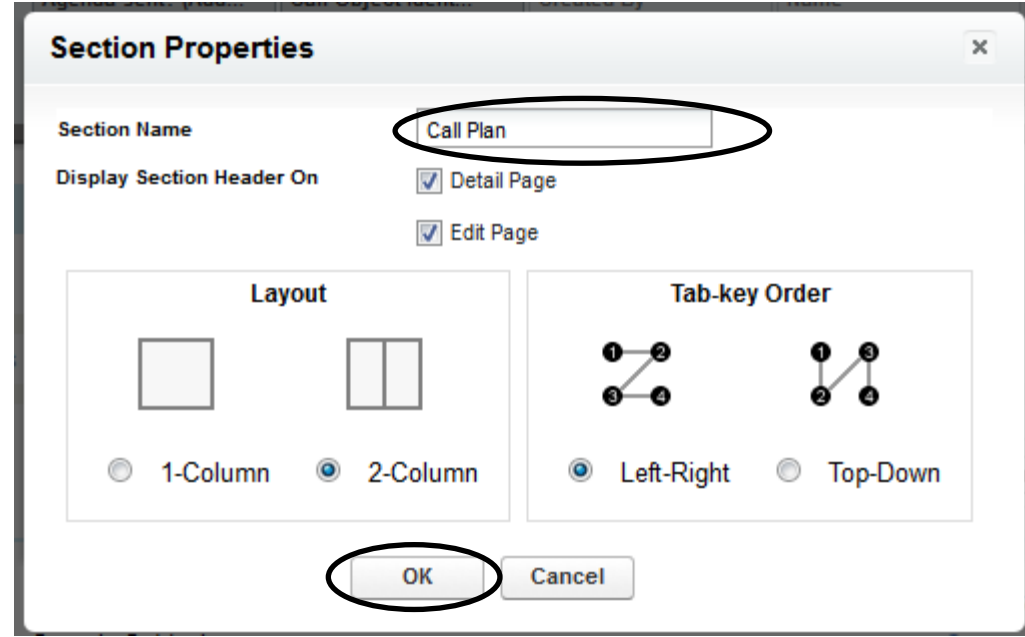
Action	Page Layout Name	Created By
Edit Del	Task Layout	Ron Snyder, 9/4/2012 8:31 PM

2. Editing the Page Layout for Tasks

Drag Section Field to where you want it on the page layout.



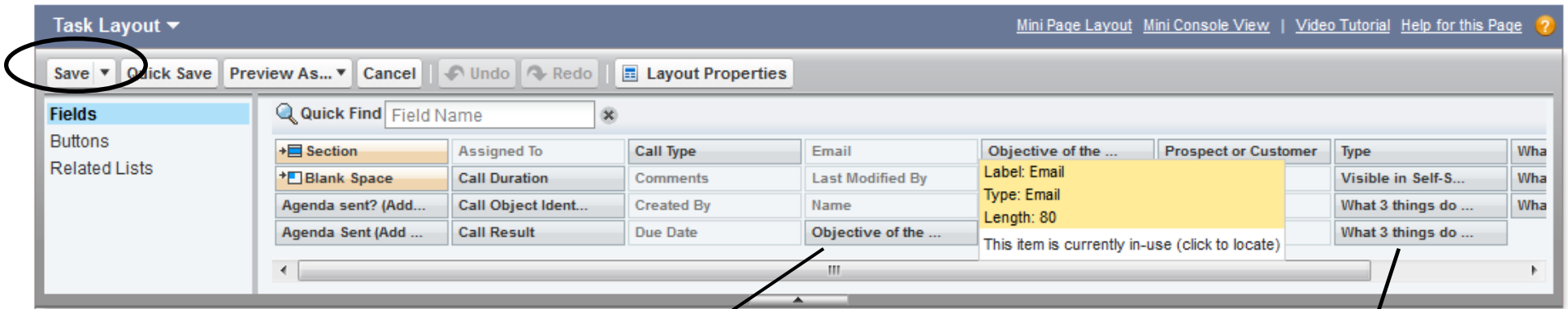
Enter Section Name: Call Plan and click OK.



2. Editing the Page Layout for Tasks

Drag Fields into the Call Plan Section as you want them in the page layout.

Then click Save.



Call Plan			
Objective of the call	Sample Objective of the call	What 3 things do you want to learn?	Sample What 3 things do you want to learn?
Outcome / Next Steps	Sample Outcome / Next Steps	What 3 things do you want to convey?	Sample What 3 things do you want to convey?
What do you want to ask for?	Sample What do you want to ask for?	What can you give?	Sample What can you give?

3. Editing the Page Layout for Events

The Layout is modified by going to: **Setup > Customize > Activities > Event Page Layout**

Click Edit.

The screenshot shows the Salesforce Setup interface. On the left is a navigation sidebar with sections: Force.com Home, System Overview, Personal Setup (with sub-items like My Personal Information, Email, Import, Desktop Integration, My Chatter Settings), and App Setup (with sub-items like Customize, Tab Names and Labels, Home, and Activities). Under Activities, there is a list of options including Task Fields, Task Validation Rules, Task Triggers, Task Buttons and Links, Task Page Layouts, Task Field Sets, Task Record Types, Task Limits, Event Fields, Event Validation Rules, Event Triggers, and Event Buttons and Links. An arrow points to the 'Event Page Layouts' link at the bottom of this list. The main content area is titled 'Event Page Layout' and contains a table of existing layouts. The table has columns for Action, Page Layout Name, and Created By. One row is visible for 'Event Layout' created by 'Ron Snyder' on 9/4/2012 at 8:31 PM. The 'Edit' link in the Action column for this row is circled in red.

Expand All | Collapse All

Quick Find

Force.com Home

System Overview

Personal Setup

- ▶ My Personal Information
- ▶ Email
- ▶ Import
- ▶ Desktop Integration
- ▶ My Chatter Settings

App Setup

- ▣ Customize
 - ▶ Tab Names and Labels
 - ▶ Home
 - ▣ Activities
 - Task Fields
 - Task Validation Rules
 - Task Triggers
 - Task Buttons and Links
 - Task Page Layouts
 - Task Field Sets
 - Task Record Types
 - Task Limits
 - Event Fields
 - Event Validation Rules
 - Event Triggers
 - Event Buttons and Links

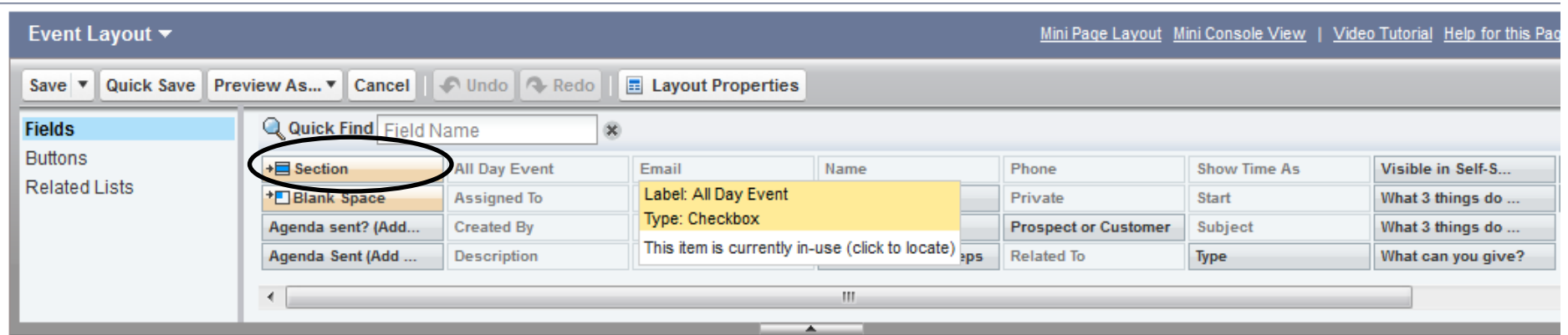
Event Page Layouts

New Page Layout Assignment

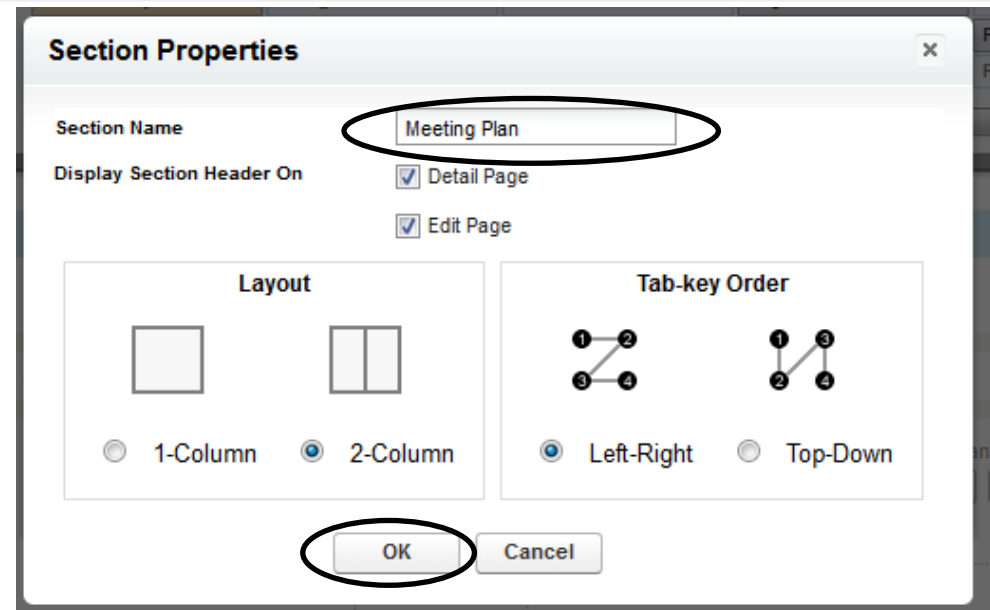
Action	Page Layout Name	Created By
Edit Del	Event Layout	Ron Snyder, 9/4/2012 8:31 PM

3. Editing the Page Layout for Events

Drag Section Field to where you want it on the page layout.



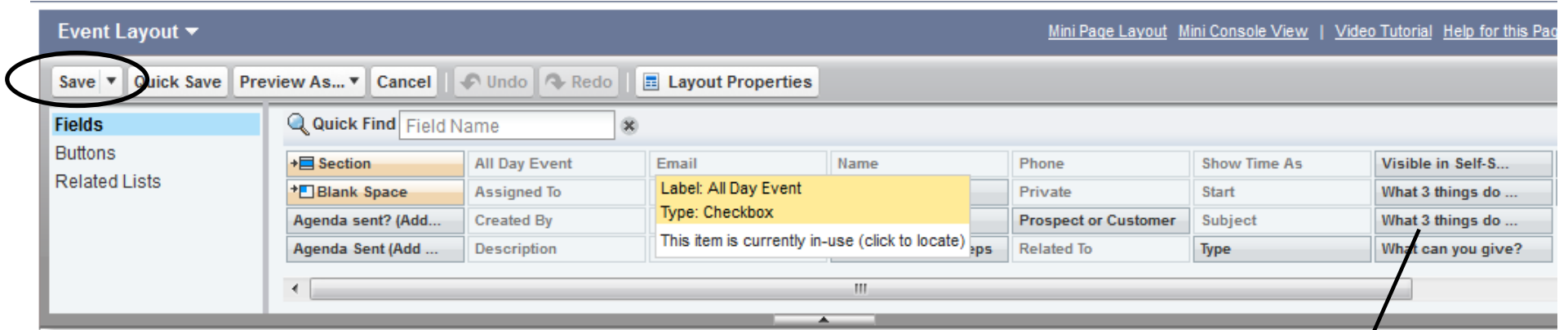
Enter Section Name: Meeting Plan and click OK.



3. Editing the Page Layout for Events

Drag Fields into the Meeting Plan Section as you want them in the page layout.

Then click Save.



Meeting Plan

Objective of the Meeting	Sample Objective of the Meeting	What 3 things do you want to learn?	Sample What 3 things do you want to learn?
Outcome / Next Steps	Sample Outcome / Next Steps	What 3 things do you want to convey?	Sample What 3 things do you want to convey?
What do you want to ask for?	Sample What do you want to ask for?	What can you give?	Sample What can you give?