GSP Target Tracker

Configuration / Setup Guide

THE GARY SMITH PARTNERSHIP
www.garysmithpartnership.com

GSP Target Tracker

USER AND SETUP GUIDE

Version: 1.7

GSP. GARY SMITH PARTNERSHIP

Contents

1 Introduction

Welcome to the GSP Target Tracker!

The Tracker is the most powerful, yet straightforward way to measure sales versus target in Salesforce.

It's ready to use out-of-the-box. However, there are also several items that you can adjust to tailor the app to your specific needs.

The purpose of this guide is to:
- Describe the out-of-the-box features that are ready to use right now.
- Explain how to adjust the app further, should you need to.
- Answer those Frequently Asked Questions.

If you have another question or get stuck, don't hesitate. Get in touch by using the Contact Us page on our website.

http://garysmithpartnership.com/contact-us

With that, let's start with how to set up targets for salespeople.

2 Setting Up and Managing Salesperson Targets

You can create monthly, quarterly or annual salesperson targets in the GSP Target Tracker. There are two ways to create and set up these targets.

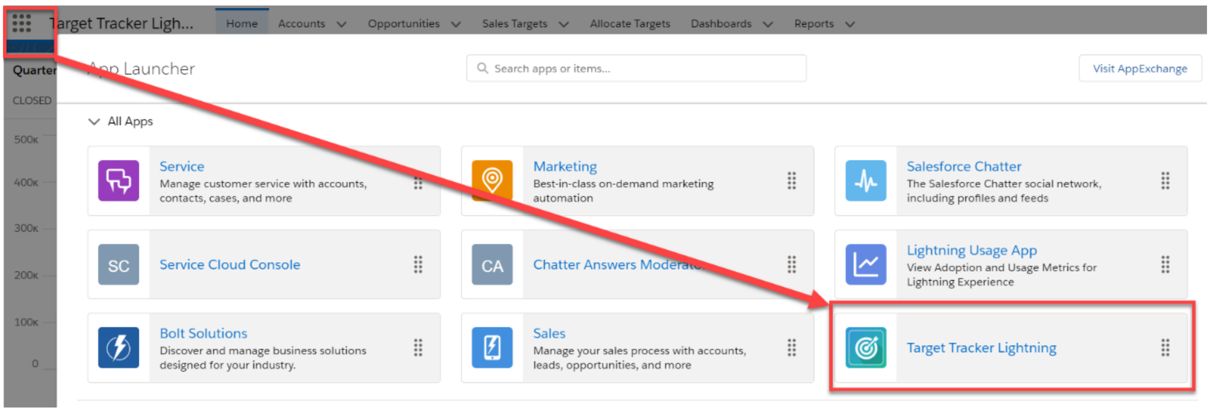
1) Use the Allocate Targets page (monthly targets only).
2) Use the Apex Data Loader to create monthly, quarterly or annual targets.

The most common approach is to use the Allocate Targets page to create monthly targets, so let's start with that.

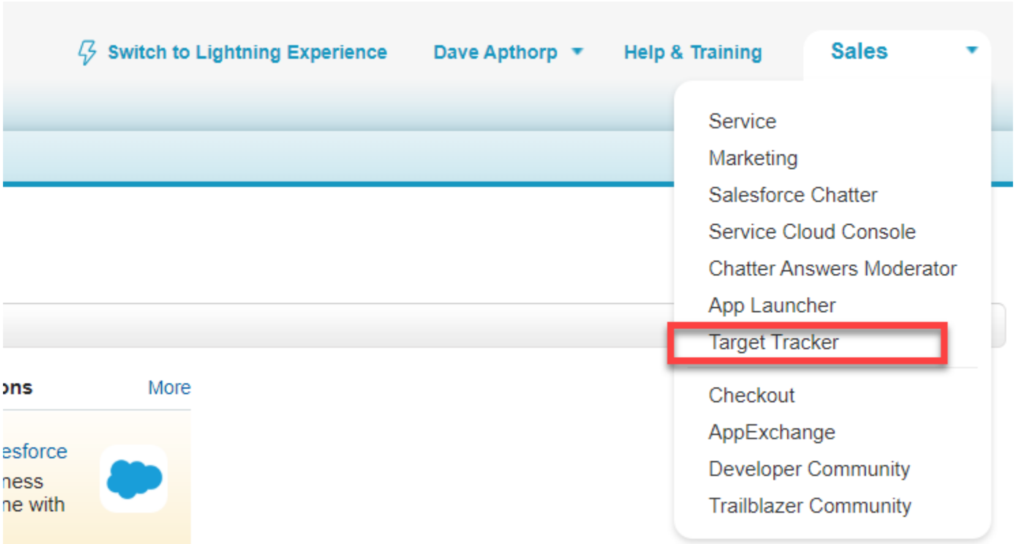
1.1 Create Monthly Targets

The Allocate Targets page is a quick and straightforward way to create monthly targets. No technical experience or know-how is needed to use the Allocate Targets page.

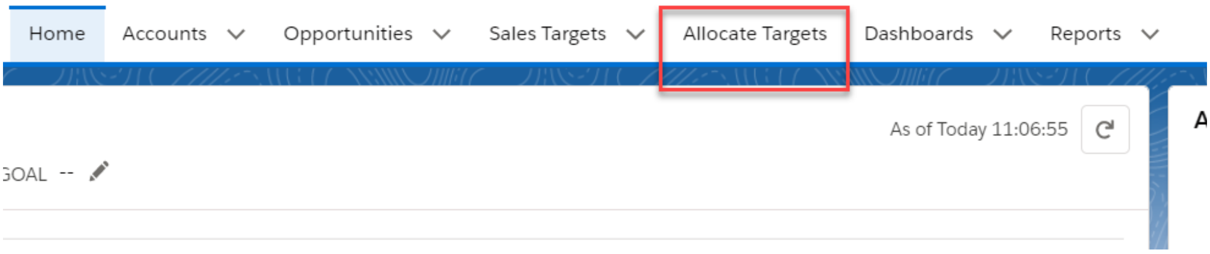
To begin, select the GSP Target Tracker app. In Lightning you do this by clicking on the nine-dot matrix at the left-hand end of the tabs, then on the GSP Target Tracker app.



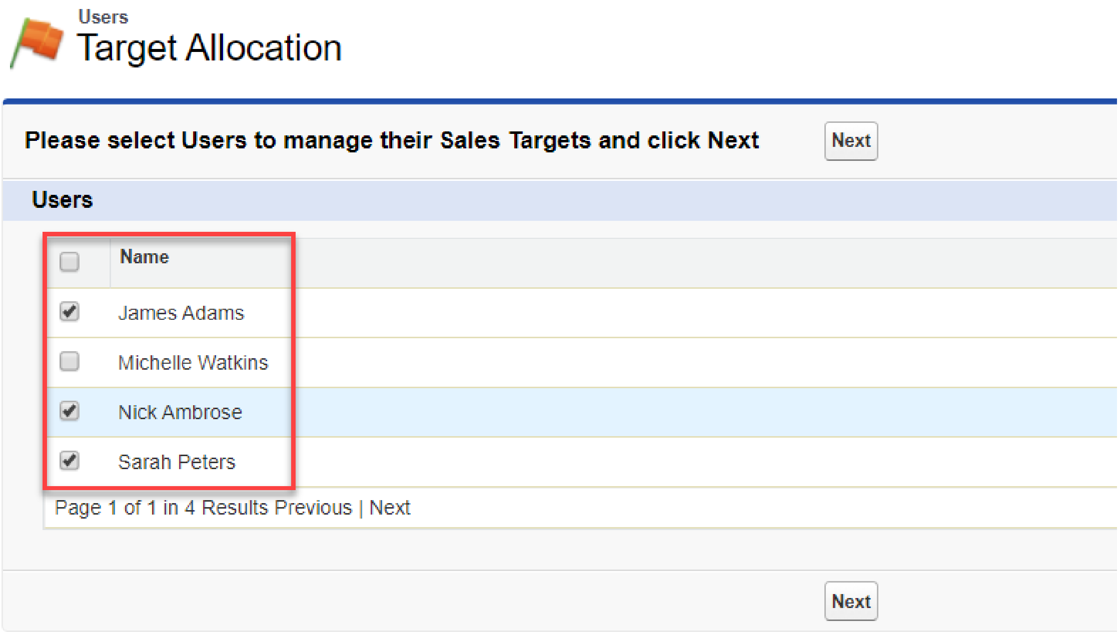
If you're using the Classic interface, select the GSP Target Tracker app from the menu in the top right.



In either case, you're now ready to click the Allocate Targets tab.



On the Allocate Targets page, start by selecting the Users for whom you want to create targets. In this case, we'll create targets for three people.

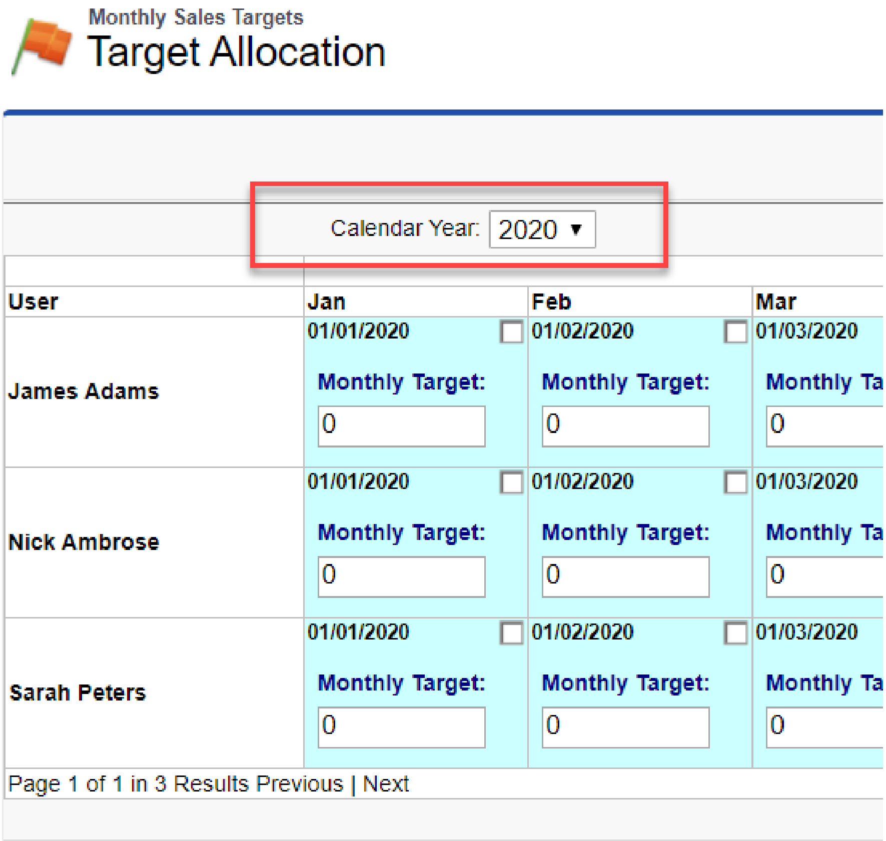


On the following page, select the Calendar Year for which you want to create targets.

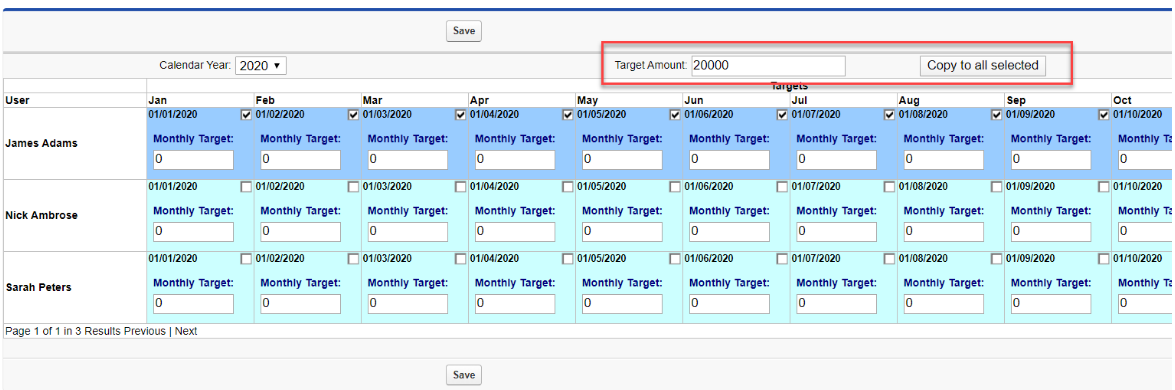
PLEASE NOTE:

1. If your Financial Year isn't the same as the Calendar Year, allocate targets first for the current calendar year; then repeat the process to allocate targets for the following calendar year.

2. If you don't yet know the target for the full year, no problem. Create targets with a value of zero and update them later using the Allocate Targets page or a List View.



After this, you can enter targets individually for each month. However, if your targets are the same for certain months or salespeople then a quicker way is to enter a target into the Target Amount field; then select the relevant columns or rows to which you want to apply this target.



In this case, we are creating a target of $20,000 per month for James Adams.

Enter a target figure for each User / month then click Save.

Pro Tip:
If the target figure is not yet published for all months, it's best practice to create the target with a figure of zero and modify the amount later.

Once saved go to the Sales Targets tab; click on the All Targets List View. You should see the targets you've just created.

(By the way, opportunities will link automatically to the relevant targets when you create the target records. There's no need to manually link opportunities to targets.)

Pro Tip:
When you create Sales Targets, Salesforce will take a few seconds to search through all existing opportunities that should link to target records. Be patient whilst this is happening and don't click the Save button again otherwise you will create duplicate target records! In Lightning, a popup will tell you when the process is complete.

1.2 Create Quarterly or Annual Targets

By default, the Target Tracker app assumes you are using monthly sales targets.

However, if your company uses quarterly or annual targets, you can make some simple adjustments to incorporate these target records.

There are two steps, explained carefully below.

1. Update the MST Target Period custom setting.
2. Use the Data Loader to import Quarterly or Annual Targets.

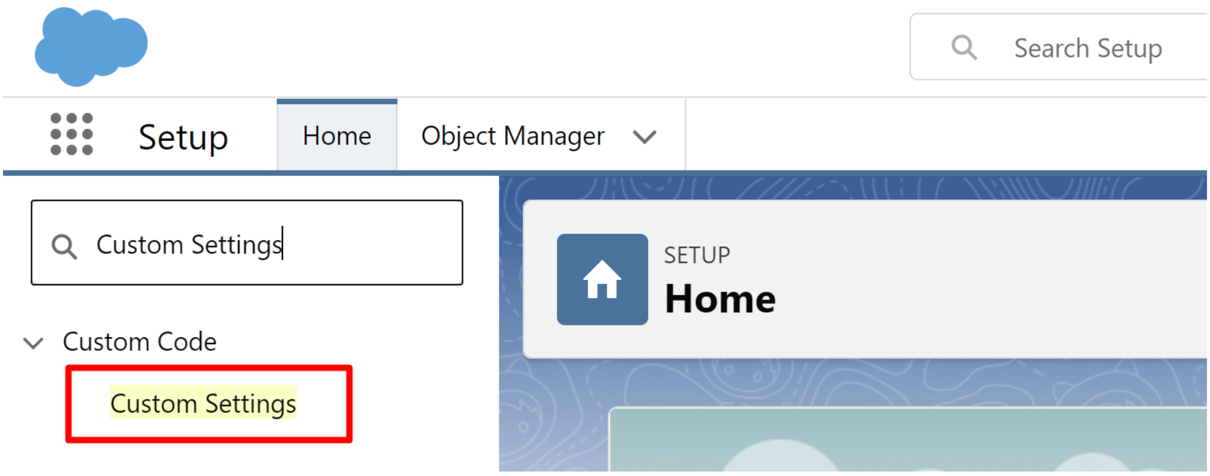
Let's take them one at a time.

1.2.1 Update the MST Target Period Custom Setting

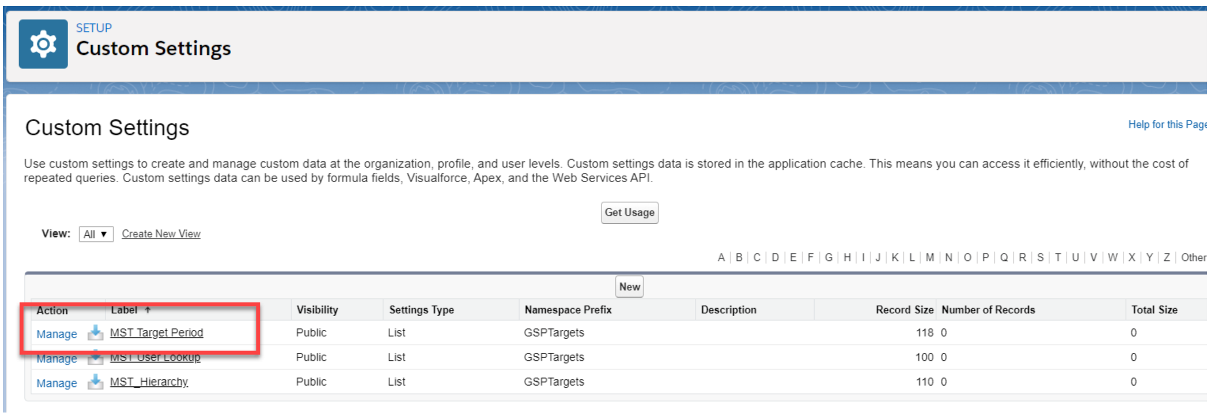
Do the following:

Here's what to do (works in both Lightning and Classic):

1. Go to Setup > Search for Custom Settings in the setup search box.

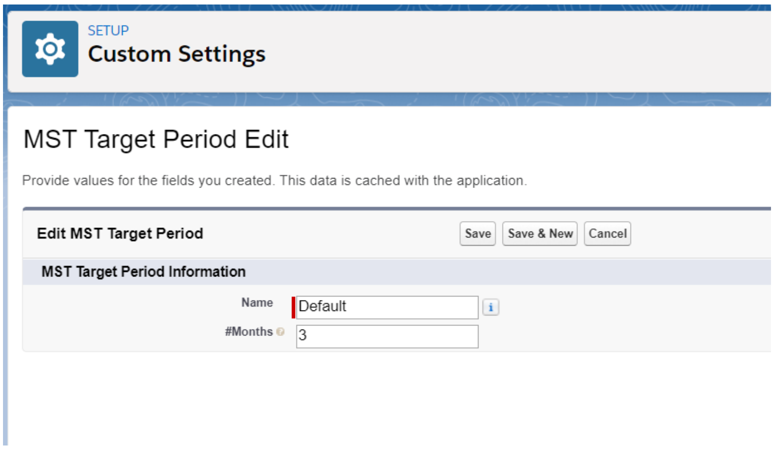


2. Click on Manage next to the MST Target Period custom setting.



3. Hit the New button and create a new record with the following values:
   Name: Default

   For quarterly targets, enter 3 into #Months.
   For annual targets, enter 12 into #Months.

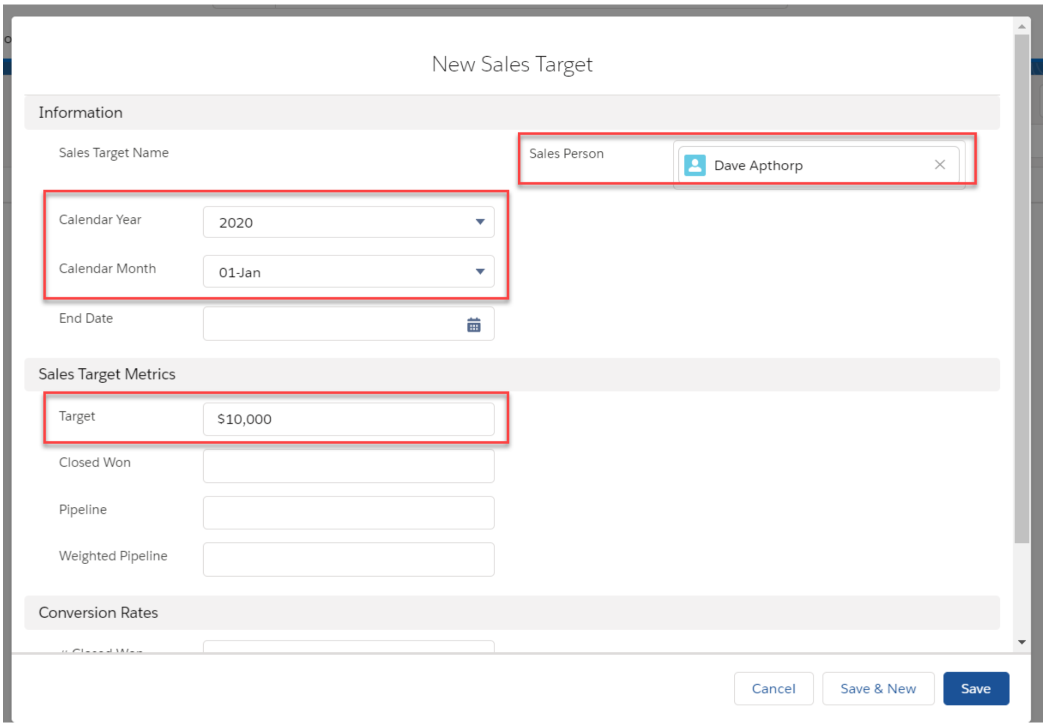

SETUP
Custom Settings
MST Target Period Edit
Provide values for the fields you created. This data is cached with the application.
Edit MST Target Period
Save
Save & New
Cancel
MST Target Period Information
Name
Default
#Months
3

4. Hit Save.

Now you're ready to create the targets. Here's what to do.

1. Manually create a single target for one User.

   Do this by clicking the Sales Targets tab, then New. You only need to populate the following four fields:
   - Calendar Year
   - Calendar Month
   - Sales Person
   - Target.



2. Export this target using the Apex Data Loader. Doing this is a quick and easy way to create the MS Excel template for importing additional targets.

   Extend the spreadsheet to include targets for the other months and salespeople.

   You only need to include the same four fields in the export. However, if you use multi-currency, include the Currency in a separate column.

   Also, if you are creating annual targets, set the Calendar Month to be the first month of the new financial year.

3. Manually delete the Sales Target you initially created. This is so that you don't get a duplicate when doing the import in Step 4.

4. In the spreadsheet, enter values for:
   - Calendar Year
   - Calendar Month
   - Target Amount
   - Currency (if using multi-currency).

	A	B	C	D
1	GSPTARGETS__CALENDAR_MONTH__C	GSPTARGETS__CALENDAR_YEAR__C	GSPTARGETS__SALES_PERSON__C	GSPTARGETS__MONTH_TARGET__C
2	01-Jan	2020	0053z00000BGxYVAA1	10000
3	02-Feb	2020	0053z00000BGxYVAA1	10000
4	03-Mar	2020	0053z00000BGxYVAA1	10000
5	04-Apr	2020	0053z00000BGxYVAA1	10000
6	05-May	2020	0053z00000BGxYVAA1	10000
7	06-Jun	2020	0053z00000BGxYVAA1	10000
8	07-Jul	2020	0053z00000BGxYVAA1	10000
9	08-Aug	2020	0053z00000BGxYVAA1	10000
10	09-Sep	2020	0053z00000BGxYVAA1	10000
11	10-Oct	2020	0053z00000BGxYVAA1	10000
12	11-Nov	2020	0053z00000BGxYVAA1	10000
13	12-Dec	2020	0053z00000BGxYVAA1	10000

5. Import the Targets using the Data Loader. (Remember to delete the manually created target from the spreadsheet before performing the import).

3 Using a Custom Opportunity Field Instead of Amount

To compare sales performance against target, the GSP Target Tracker app uses the Opportunity Amount field by default.

However, not every business uses the Opportunity Amount field. For example, you may use ARR (Annual Recurring Revenue) or Margin to compare sales revenue with target.

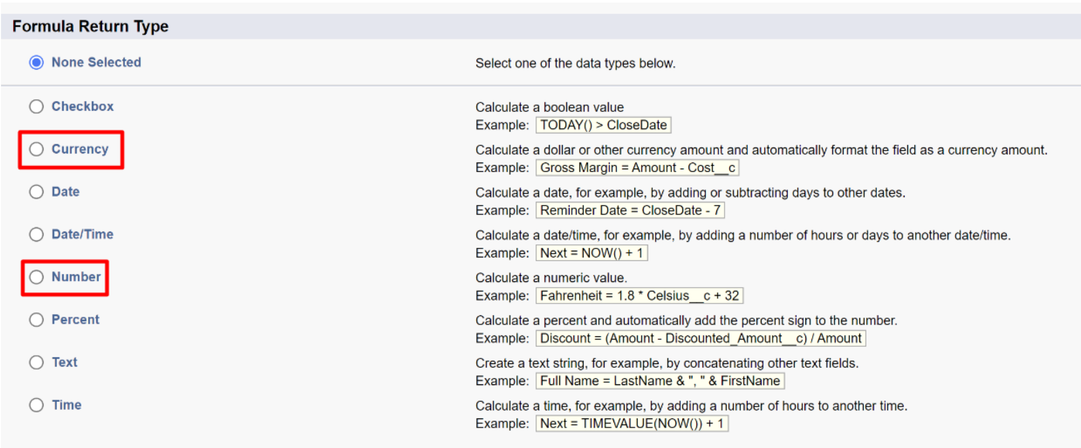
No problem, you can use this custom field with the GSP Target Tracker.

However, there is some configuration you will need to do to get the values rolling up correctly.

Do the following:

1. Create three new formula fields on the Opportunity referencing the custom field you wish to use on the Target Record.

   Depending on your business, your formula return type may be “Number” rather than “Currency”. An example of this would be if you are rolling up physical objects/sales rather than a monetary value.



   These three new formula fields will be used to calculate the following:
   - Target Field Won Amount
   - Target Field Pipeline Amount
   - Target Field Weighted Pipeline Amount

The formulas for each field are:

Target Field Won Amount:
IF (IsWon = TRUE , *CUSTOM AMOUNT FIELD HERE* , 0)

Target Field Pipeline Amount
IF (IsClosed = FALSE , *CUSTOM AMOUNT FIELD HERE* , 0)

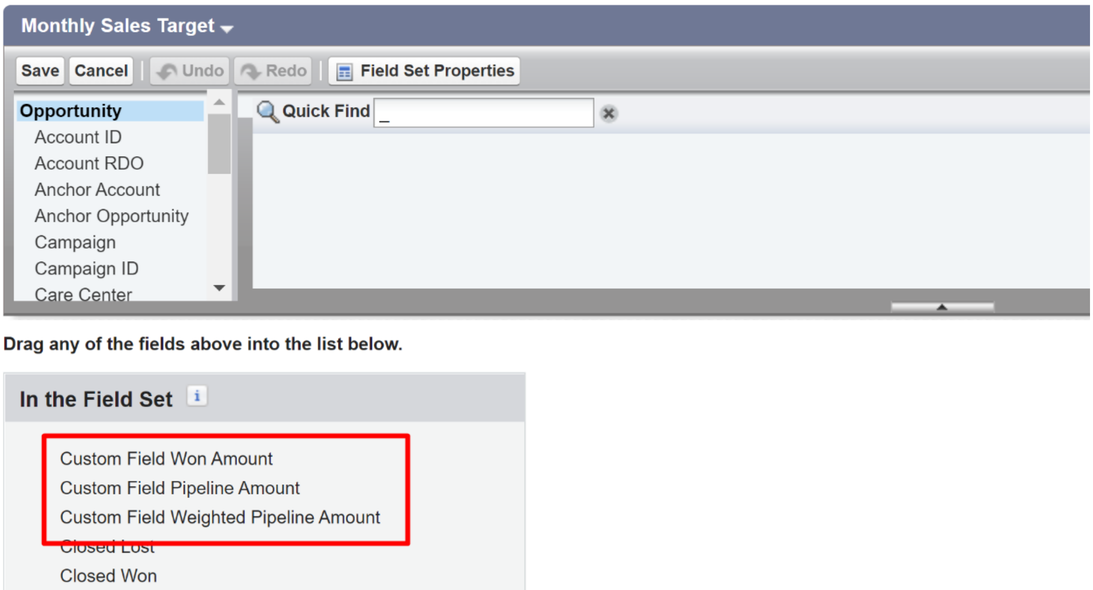
Target Field Weighted Pipeline Amount
IF (IsClosed = FALSE , *CUSTOM AMOUNT FIELD HERE* Probability , 0)

By rolling these values up to the Sales Target, we can now create the required Formula fields on the Sales Target.

Pro Tip:
Keep a note of the exact API names for each of these fields. You will need them again at a later step.

2. Now that you have created the fields on the Opportunity, you need to add them to the Opportunity field set called “Monthly Sales Target”. This field set is included in the GSP Target Tracker package.

   This field set tells the app which fields to attempt to roll up to the Sales Target.



At this point, the configuration on the Opportunity is complete - remember to click save. Next, you need somewhere to store the rolled-up values on the Sales Target.

3. Create the same fields on the Sales Target, but this time, create them as either Number or Currency fields depending on your Opportunity formulas.

   This time, we are only storing the values, so there is no need to create formula fields.

   <u>Here is the important part:</u>
   Make sure the API names of your custom Sales Target fields match the API names of your custom Opportunity fields.

   This allows the system to match the fields accurately

   Once this has been done, your Opportunity fields will correctly roll up to the Sales Target record.

4 Using Different Types of Salesperson Target

With the GSP Target Tracker, you can also segment your Sales Targets based on the Type.

New Customer targets compared to Existing Customer targets, for example.

Do the following:

1. Go to Setup > Object Manager > Opportunity > Fields & Relationship > Target Type.
   (Type is a default field on the Opportunity Object, Target Type is GSP's custom field).

2. Add the values you would like to use to split your Sales Targets. This might align with a separate picklist you have been previously using.

3. Now that you have added the values to the Target Type picklist on the Opportunity, it's time to add the same fields to the Target Type picklist on the Sales Target.

   Go to Setup > Object Manager > Sales Target > Fields & Relationship > Target Type.

   From here, add the same values to the Target Type picklist on the Sales Target.

   Once this has been done, your Opportunities will automatically link to Sales Targets with the corresponding Close Date **AND Target Type**. Remember to click the save button.

   Pro-tip:
   Create a workflow that automatically updates the Target Type field on the Opportunity based on the value of your pre-existing "type" field. That way, users can continue using the fields they are already used to!

5 Setting Up and Managing Team Targets

You can also use the GSP Target Tracker to create and manage Team Targets.

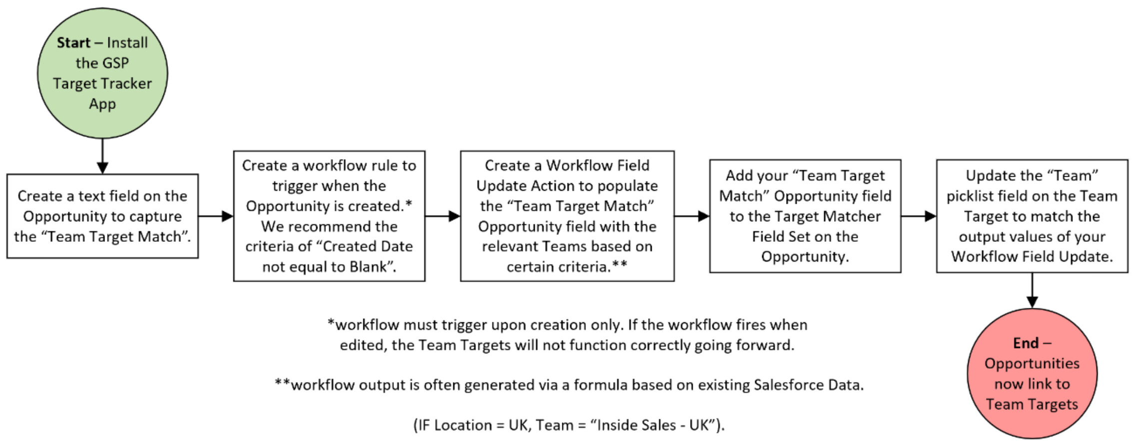
For example, you can set targets by territory or region. The Team Targets do not need to be the sum of the individual Salesperson Targets within each team.

Pro tip:
Usually, you don't need a company-level Team Target. Instead, use a report to sum the values of the teams within the company. For example, if you teams are North, South, East and West, you need four Team Targets, and a report that summarizes performance at the company level.

5.1 Configure Team Targets

This diagram shows how you configure and setup Team Targets within the app. There are step-by-step instructions and screenshots in the following sections.

Of course, if you get stuck or need help don't hesitate to use our Contact Us page to get in touch, and we'll give you a hand or answer any questions.



Let's start.

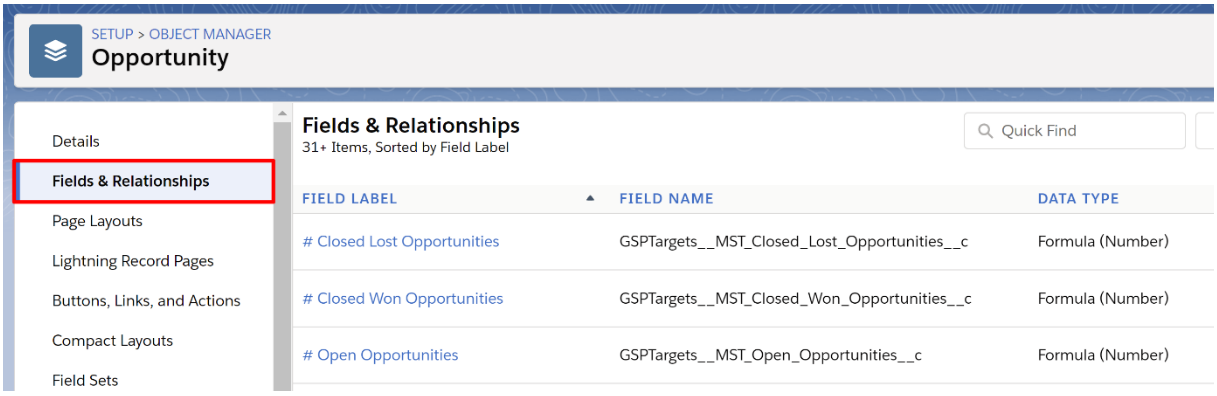
5.1.1 Create the Team Target Match Field

Rather than matching the Opportunities to target records via the Opportunity Owner, the Team Targets rely on a separate Opportunity-level field which identifies the relevant team.

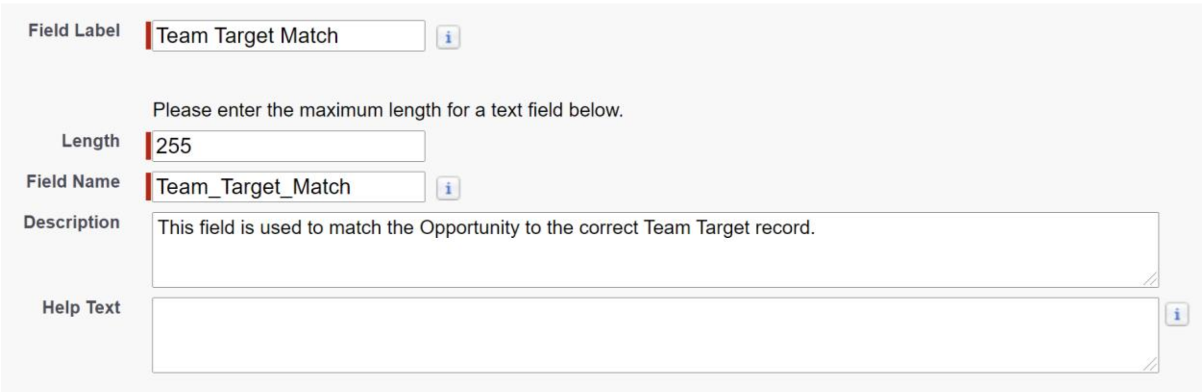
To get started, create a new Text field directly on the Opportunity record. This field is used to match the Opportunity to the correct Team Target.

Do the following:

1. Go to Setup > Object Manager > Opportunity > Fields & Relationships. From there, click the "New" button to create a new field on the object.



2. Create the new field with the data type of Text and add a relevant field label/name. You can see our example of "Team Target Match" below.



3. Position your newly created field in the Opportunity Page Layout as you see fit.

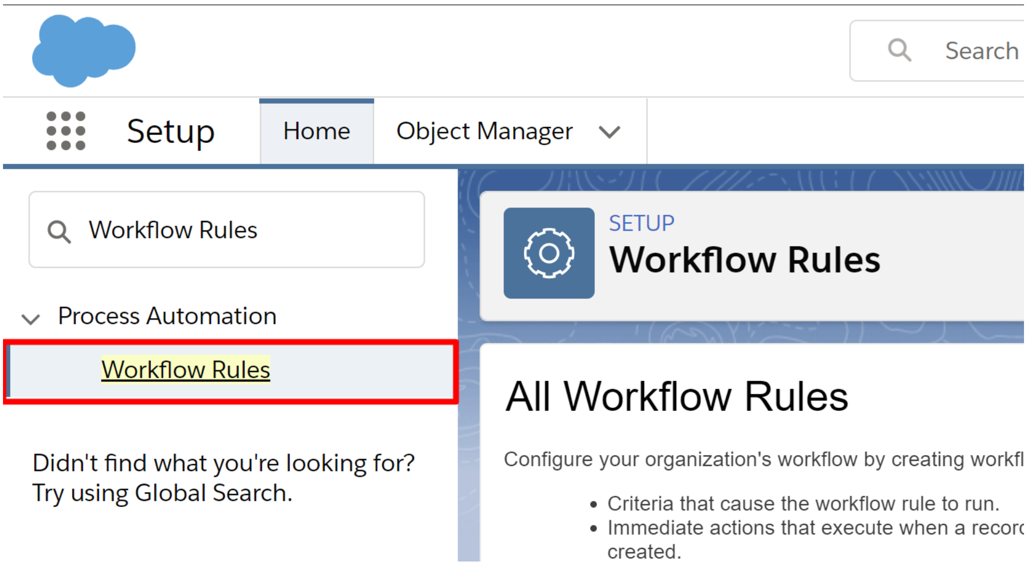
Next, you need a process to populate this field with the correct information.

5.1.2 Create a Workflow Rule & Field Update

Now that you have a field to store the Team Target matching data on the Opportunity, the next thing to do is create a Workflow Rule & Field Update to update the field with the relevant Team value.

Do the following:

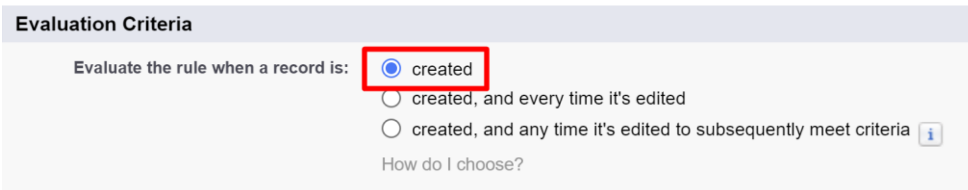
1. Go to Setup > Workflow Rules. Then, click the “New Rule” button to begin creating the Workflow Rule.



2. Select Opportunity as the object to which this Workflow applies.

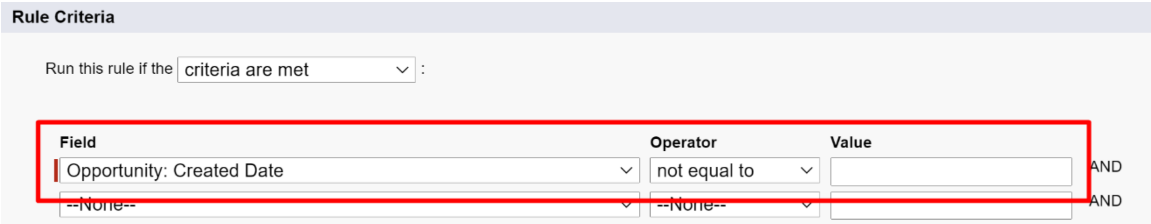
3. Populate the Workflow Rule fields. Give the Workflow Rule a relevant name and include a description if you wish.

   Under the Evaluation Criteria, select “Evaluate the rule when a record is: **created**”.



4. This Workflow Rule should trigger as soon as the Opportunity is created.

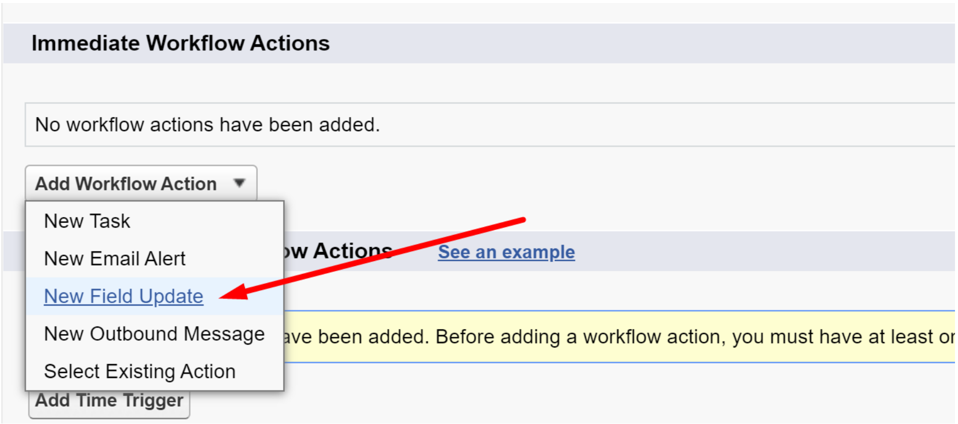
In our example below, we have configured our Workflow Rule to trigger when the Opportunity Created Date is not equal to "blank". This means the workflow rule will fire as soon as every Opportunity is created.



Now that you have created the Workflow Rule trigger, it's time to create the Workflow Field Update Action.

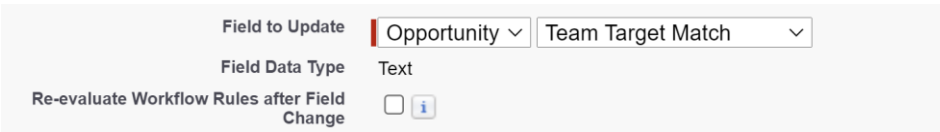
Do the following:

1. Click "Add Workflow Action" on your newly created Workflow Rule and select "New Field Update".

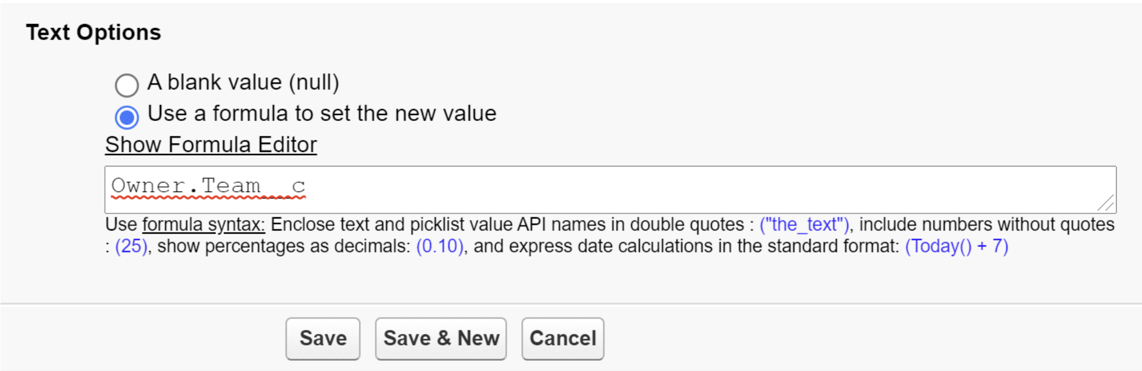


2. Populate the Workflow Action fields. Give the Workflow Action a relevant name and again, include a description if you wish.

   Make sure to select your newly created Opportunity text field as the field to update.



3. The output of the Field Update will be a formula. In the example below, the formula is outputting the opportunity field with the Team Name from the Owner record.



This means, when the Opportunity is created, the team of the user that owns the Opportunity will be copied into the Team Target Match field on the Opportunity.

For example, the User team might be “UK – Inside Sales”.

However, you can use whatever formula field makes sense in your business.

Now that you’ve created an Opportunity field to store the team value, you’re ready to update the Field Set.

5.1.3 Add New Opportunity Field to Target Matcher Field Set

We’ve created an Opportunity Field Set that comes included in the GSP Target Tracker App.

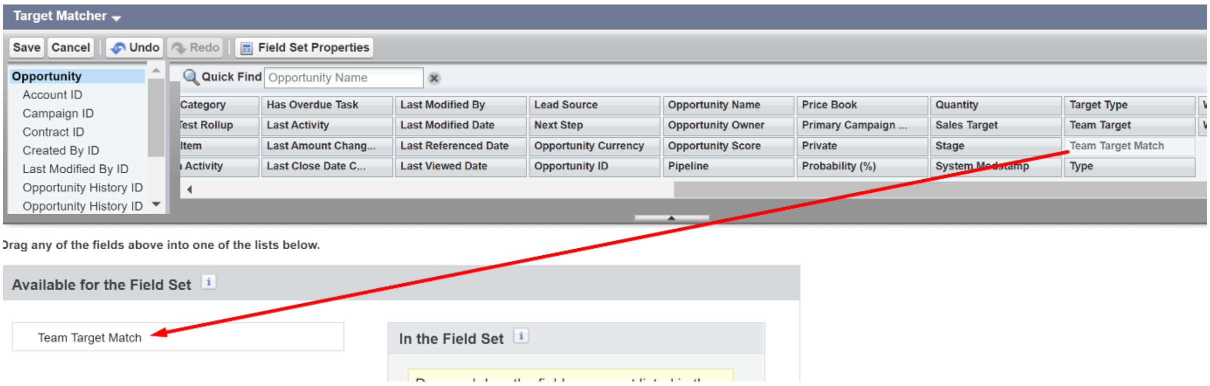
This allows the Team Target to understand which field on the Opportunity defines the team.

Do the following:

1. Go to Setup > Object Manager > Opportunity > Field Sets.

2. In the Opportunity Field Sets, you’ll find the “Target Matcher” Field Set.

3. Open the Field Set and drag your newly created Opportunity field into the fields available for the Field Set. Then, click Save.



Great, you're almost there.

5.1.4 Update Team Target Picklist

The final step is to update the Team picklist on the Team Target.

Pro Tip:
Take care to make sure the values you add to this picklist match all possible outcomes of the formula you created on the Workflow Field Update.

Do the following:

1. Go to Setup > Object Manager > Team Target > Fields & Relationships.

2. Go to the "Team" picklist field.

3. Update the picklist field values with the values included in your Field Update Workflow.

   For example, if you are using the Team field on the User Record, the Team values might be:

   UK – Inside Sales
   UK – Field Sales
   USA – Inside Sales
   USA – Field Sales

   That's it. New Opportunities will automatically link to the Team Targets you create.

To link existing Opportunities, populate the Team Target Match field you created on the Opportunity with the relevant team value. You can do this using the Apex Data Loader or a List View.

If you do this before creating the Team Targets, it means the app will automatically search through all opportunities and link them to relevant targets when you create them.

5.2 Creating Team Targets

There are two ways to create Team Targets:

1) Use the Apex Data Loader to create Team Targets.
2) Manually create the Team Target records inside the Team Targets tab.

Pro Tip:
Set the Batch Size on the Data Loader to 1 when creating Team Targets. This gives each new Target the time to find matching opportunities before processing the next target record.

5.3 Roll Up Additional Team Target Fields

The ability to roll up additional fields from the Opportunity to the Team Target is also built into the GSP Target Tracker app.

To roll these fields up to the Team Target, you need to:

1. Include the desired field in the Team Target field set on the Opportunity (in the same way we added the custom Opportunity field to the Target Matcher change set in the previous steps).

   Go to Setup > Object Manager > Opportunity > Field Sets > Team Target.

   Once here, edit the field set to include your roll up fields.

2. Ensure a corresponding field on the Team Target exists with an identical API name.

   Note: *An exact match on the API name is* ***required****. If the API name is not identical, the roll up process will not work.*

3. Once added to the field set, standard fields will roll up and relink automatically. Formula fields derived from any of the below fields will also be rolled up automatically.

These fields are:
1. CloseDate
2. IsClosed
3. IsWon
4. Amount

After adding standard fields or formula fields derived from the above fields, no further work is required. These fields will roll up to the Opportunity as expected.

4. Roll ups from custom fields will need a workflow rule on the Opportunity which triggers a field update to the 'Auto Update' checkbox included with the app.

   This field update should set the 'Auto Update' checkbox to True.

   The GSP Target Tracker underlying code is already connected to the Auto Update field. By setting the value to True, the app knows to update the value from the Opportunity to the Team Target record as normal.

   After this process has completed, the 'Auto Update' checkbox is automatically returned to the value of False.

6 Editing Target Records

Now that you've setup the targets, you might want to change them. For example, the target amounts have changed.

No problem.

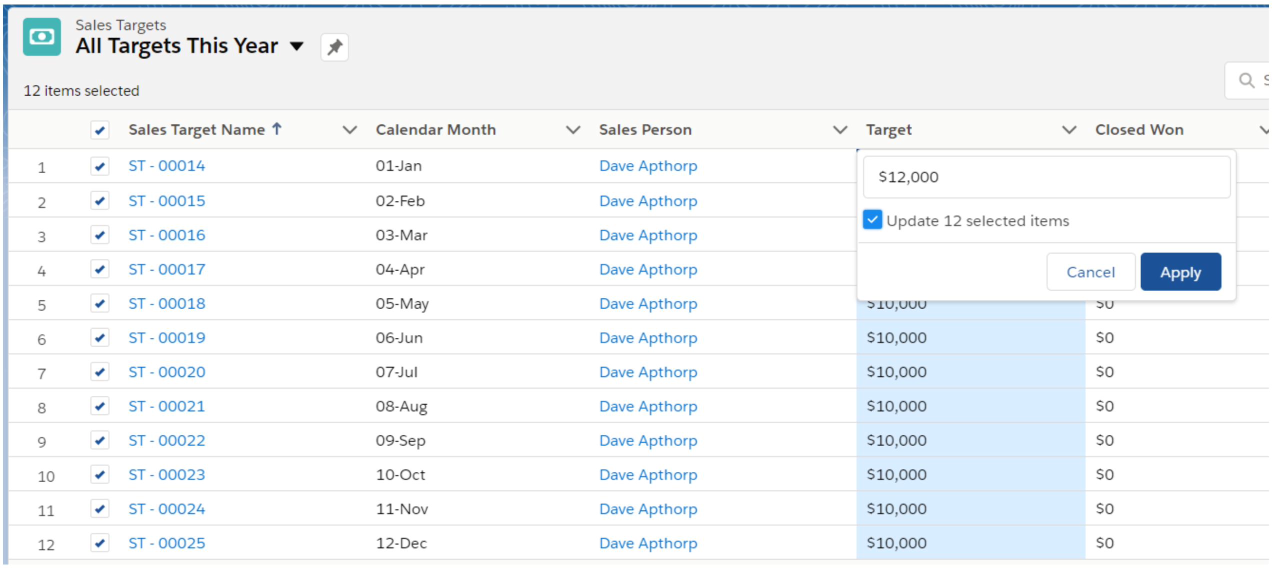
There's three easy ways to do this.

1. Use the Allocate Targets page to update monthly targets.

   The process is very similar to when you created the targets. This time, just change the target amounts.

2. Use a List View.

   This approach works for monthly, quarterly and annual targets. Use the mass inline editing facility on List Views to update multiple records.



		Sales Target Name	Calendar Month	Sales Person	Target	Closed Won
1	✔	ST - 00014	01-Jan	Dave Apthorp		
2	✔	ST - 00015	02-Feb	Dave Apthorp		
3	✔	ST - 00016	03-Mar	Dave Apthorp		
4	✔	ST - 00017	04-Apr	Dave Apthorp		
5	✔	ST - 00018	05-May	Dave Apthorp	$10,000	$0
6	✔	ST - 00019	06-Jun	Dave Apthorp	$10,000	$0
7	✔	ST - 00020	07-Jul	Dave Apthorp	$10,000	$0
8	✔	ST - 00021	08-Aug	Dave Apthorp	$10,000	$0
9	✔	ST - 00022	09-Sep	Dave Apthorp	$10,000	$0
10	✔	ST - 00023	10-Oct	Dave Apthorp	$10,000	$0
11	✔	ST - 00024	11-Nov	Dave Apthorp	$10,000	$0
12	✔	ST - 00025	12-Dec	Dave Apthorp	$10,000	$0

3. Use the Apex Data Loader.

   Likewise, this approach can be used on monthly, quarterly or annual targets.

   Export the existing targets (remember to include the Sales Target Id). Update the Month Target field in Excel. Perform an update on the Sales Target object.

7 Exclude Opportunities from Targets

Sometimes you want to exclude certain types of opportunity from the Target Tracker app.

For example, let's say you have New Customer and Renewal opportunities. Let's also assume only the New Customer opportunities count towards the target.

No problem, all you need to do is exclude the Renewal opportunities.

Here's how to do that.

You need to automatically populate a checkbox field on the Opportunity, 'Do Not Link To Target'.

If this checkbox is True (in other words, has a tick mark in it) the opportunity will not link to a target. This means the values from the opportunity will not roll up to the target record.

In most cases, the easiest way to automatically set this field to True, is to create a Workflow Rule and Field Update. Use the business logic that's relevant to your business to set the Do Not Link To Target checkbox to True, for the relevant records.

8 Change the Reports and Dashboard Charts

The GSP Target Tracker comes with a pre-built Dashboard and set of reports.

Here's how to view the dashboard:

- In Lightning, click on the Dashboards tab. Then, on the left-hand side click All Folders. Click on the Targets Dashboard folder, then on the Company Target Dashboard (Lightning).

- In Classic, click on the Dashboards tab. In the dashboard picklist select Company Target Overview (Classic).

You can modify the reports in both Lightning and Classic. To do this, start by navigating to the underling report. Click Save As, to create a new version of the report. Then adjust the report to reflect your sales structure.

It's also possible to create a new version of the dashboard. A good place to start is by creating a new version of the dashboard; use Save As to create the new dashboard.

9 Frequently Asked Questions

Here's the answer to some common questions:

I want to schedule revenue from opportunities over time. It's the scheduled revenue I want to compare to targets, rather than the total opportunity amount. How do I do this?
You need our GSP Revenue Schedules app. This allows salespeople to quickly and easily schedule opportunity product revenue over time. You can create targets based on the scheduled revenue rather than the full opportunity amount.

Here's where you can find the Revenue Schedules app on the AppExchange:
https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FeFdGUAV

Alternatively, search for revenue schedules in the AppExchange search box.

Can I install the Target Tracker in my sandbox to test it?
Yes, login to the AppExchange using your normal production username and password. Click the Get It Now button on the Target Tracker listing. You'll be asked whether you want to install the app into your production or sandbox environment.

I got an install error 'User doesn't have permission to create dashboard with colors'.
We've changed some of the colors on the Target Tracker dashboard from the standard colors in order to improve the impact. This installation error happens if the system administrator (or other user installing the app) hasn't previously been given the permission to change dashboard colors.

There are some simple steps to correct this that you can find here.
https://help.salesforce.com/articleView?id=000349418&language=en_US&mode=1&type=1

Follow the instructions, then re-install the Target Tracker app.

I got an install error 'The ActionId specified was invalid for ActionType Quick Action'.
You haven't got Chatter enabled in your Salesforce environment. You company doesn't need to use Chatter, but you need to have it enabled (including the Actions In the Publisher setting).

To do this, search for Chatter Settings in the configuration search box. Click the Edit button. Enable Chatter AND the "Actions In the Publisher" setting further down the page.

You should now be good to install the Target Tracker app.

Can I have a free trial?
Yes, everyone gets a 14-day free trial to test and evaluate the app. You can uninstall the app at any time if you decide not to go ahead.

How do I buy the GSP Target Tracker?
After you've installed the trial version of the app, go back to the AppExchange listing. Login to the AppExchange using your username and password.

The Get It Now button will have changed to a Buy Now button. Click the button and follow the instructions.

If you've previously installed a trial version of the app in Production, you won't lose your existing data. The app will be upgraded to a paid-for version which means you can continue to use both the app and the data you've already created.

I want to go ahead and purchase the app. How long is the contact for?
There's no long-term contract or commitment. We charge a monthly fee via the AppExchange. You can uninstall the app at any time and the monthly subscription will be automatically cancelled.

Does any data in the Target Tracker leave my Salesforce environment?
No, all data remains within your Salesforce system.

Can GSP see the target or opportunity data?
No, we have no visibility of any data within your Salesforce environment.

Is it possible to customize the GSP Target Tracker further?
Yes, many of our customers have unique customizations based on company-specific needs. Get in touch (see below) to talk to us.

I have a question or need some help. What do I do?
Don't hesitate, get in touch with us. Here's the link to our Contact Us page.
https://garysmithpartnership.com/contact-us/

Alternatively, search for The Gary Smith Partnership in Google. Click on the Contact Us tab on our website.

Remind me where I can find the GSP Target Tracker on the AppExchange.
Here's the Listing:
https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000FvIf6UAF

Or search for Targets in the AppExchange search box.

10 Get More Help

Do not hesitate to get in touch if you have any questions about the GSP Target Tracker, or any of our other apps.

It's easy to do; simply go to our website and enter your details into the Contact Us form. We'll reply to you and arrange a good time to talk.
https://garysmithpartnership.com/contact-us

