Target Automate

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Description

Target Automate gives businesses the ability to create, configure, manage, and report on targets ranging from company-wide to user-specific. The need for hard-coded targets in reports and dashboards is replaced by a centralized place to view and track past, present, and future targets.

Quick Start

The Target Automate Quick Start guide gives a high level overview of the steps needed to begin leveraging fully automated target tracking. Please read the documentation to understand all app components.

Quick start steps:

1. Assign **Target Automate - Full Access** and **Target Automate - Standard User** permission sets to appropriate users
2. Go to **Setup** > **Custom Settings** > **Target Automate Settings** > **Manage** > **New** > **Save**
3. Configure target records
4. Add **Target Attainments related list** to Opportunity page layouts
5. If you have existing opportunities that need to be related to targets, a mass touch will be needed to trigger the calculation for each opportunity
    a. You can also mass import Target Attainment records to manually associate opportunities to targets

Permissions

Two permission sets are included with the installation of Target Automate:

1. **Target Automate - Full Access** - full read, write, delete access to Target Automate objects and settings. Assign this permission set only to users who should be configuring and managing targets.
2. **Target Automate - Standard User** - read, create, edit, delete access to Target Attainment, and read access to Target. ***This permission set must be assigned to any user that should trigger target calculations through record edits.*** If you want to prevent manual updates to Target Attainment records, it is recommended to update page layouts to remove related lists and/or make fields read-only for Target Automate non-admins.

Create custom permission sets if the above do not meet your needs.

Settings

One custom setting is included with the app. The **Disable All Target Automate Triggers** checkbox can be checked in Target Automate Settings custom setting to disable all target processing in your org. It can be managed on the Setup page in the Target Automate app. **Please ensure triggers are enabled if you need target calculations active.**

Target Configuration

Configure a New Target

1. Navigate to the Targets tab
2. Click the **New** button in the Targets list view
3. Populate the fields below.
4. Click **Save** - that's it!

Target Fields

- **Name** - give your target a descriptive name
- **Description** - describe the purpose of your target
- **Active** - when checked, processing will be enabled and records will get related to this target as they are updated to meet the target criteria. Uncheck to deactivate and exclude this target from automation
- **Object API Name** - the object to which the target applies. The default and only option is Opportunity, but more objects will be supported in the future
- **Attainment Lookup Field API Name** - reference field on the Target Attainment object that references the record being related to this target. The default and only option is Opportunity__c, but this field will help support the roll out of other objects on our roadmap
- **Number API Name** - API name of the number field we are tracking with this target. For example, if we were tracking a quantity target, you would select TotalOpportunityQuantity. Any number field, including custom fields, can be added as a picklist value, as long as the field exists on the object selected in Object API Name
- **Amount API Name** - API name of the currency field we are tracking with this target. For example, if we were tracking our yearly dollar amount target, we would select Amount. Any currency field, including custom fields, can be added as a picklist value, as long as the field exists on the object selected in Object API Name
- **Target Number and Target Amount** - set the target you are trying to track. For example, if your annual company sales goal is $1,000,000, you would populate the Target Amount field
- **Date API Name** - all targets must be scoped by a date range. Any Date or Date/Time field can be added as a picklist value, as long as it exists on the object selected in Object API Name. For example, a Q2 target would have a Start Date of April 1st and an End Date of June 30th
- **Filter Field API Name** and **Filter Field Value** - field filter functionality gives you another layer of filtering beyond a date range. Any text, boolean, picklist, or multiselect picklist field that exists on the object selected in Object API Name can be selected, and the corresponding value can be populated. For example, we would select IsWon and populate "true" if we wanted to apply only won opportunities to this target

- **People Field API Name** and **People ID** - allows for filtering targets by user. We could set a yearly target per sales rep, select OwnerId as the People Field API Name, and populate the rep's user ID in the People ID. Only opportunities that fit the date range, field filter, and people filter would get related to this target. Any user lookup field can be added as a picklist value as long as it exists on the object selected in the Object API Name

Best Practices, Limitations, and Recommendations

- **Formula fields cannot be used in Date API Name, Filter Field API Name, and People Field API Name**. Formula field values can change without edits to the record, so the target automation would not be triggered.
- If you have field filter logic that is too complex for Filter Field API Name and Filter Field Value, we recommend working with your admin to use a flow to update a field, or reach out to support@highroll.app for assistance
- Deactivate historical targets to avoid accidental overwrites of target attainment information
- Updating target information or creating a new target for a current date period may require a mass update to ensure existing records are processed appropriately

Target Attainments

When a record applies to an active target, a Target Attainment record is automatically created to relate the record to the target. Target Attainment records can also be created and managed manually.

Two Target Attainment fields allow for more flexibility when tracking targets:

- **Do Not Update -** when checked, it prevents the Target Attainment record from being updated by the automation when a related record is edited. For example, an opportunity has an Amount value of 100,000, but there was an exception in the sales process and we want the deal to count for 110,000 toward the target as long as the opportunity meets the target criteria. Checking the Do Not Update checkbox and updating Target Amount Attained to 110,000 will ensure the amount stays the same as long as the opportunity fits the target.
- **Do Not Delete -** when checked, it prevents removal of the Target Attainment record when an update to the related record triggers recalculation of its target attainments. For example, an opportunity has a Close Date of January 1st, but an approved exception allows us to count the deal in December. Checking Do Not Delete will prevent removal of the Target Attainment record even if the opportunity is updated and no longer meets the target criteria. Target Attainment Amount will still stay in sync with the opportunity's Amount, but we have locked the opportunity into the target, regardless of criteria.

Both checkboxes can be used at the same time.

It is recommended to add the Target Attainments related list to Opportunity page layouts. The list will provide visibility into what targets the record applies.

Support

Please reach out to support@highroll.app for assistance or if you have any issues with Target Automate.