AZ Goals

FOR EVERYONE WHO TRACKS A TARGET

User Guide

Package version 1.72.0

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AZMT Digital Solutions, Lda · support@azimute.eu

1. What AZ Goals does

A Salesforce report tells you what happened. AZ Goals tells you whether you are going to hit your number.

You pick something in Salesforce worth measuring — closed revenue, new accounts, cases resolved inside SLA, anything on any object your administrator has allowed. You set a target and a date range. From then on AZ Goals calculates progress from your live records, works out whether that progress is ahead of or behind the pace needed to finish on time, and tells you when it slips.

Nothing is exported, nothing is typed in by hand, and no spreadsheet is involved.

2. Finding your way around

Open the App Launcher, search for **AZ Goals**, and open the app. It has two tabs.

AZ Goals is the main tab: the team dashboard and the full list of goals.

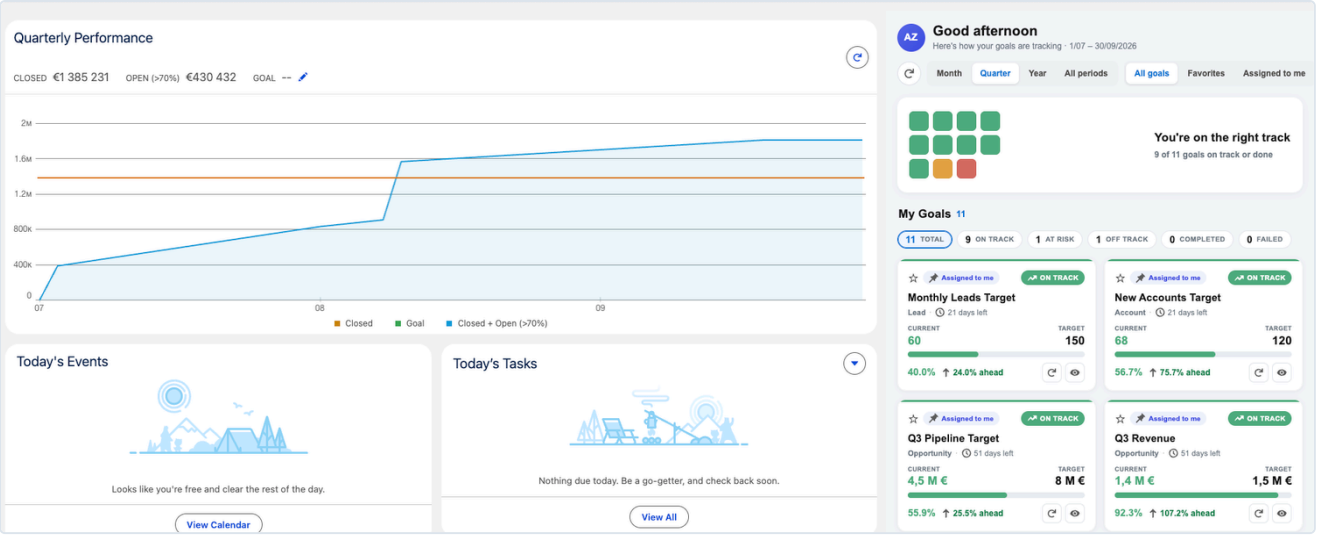
AZ Goals Setup is where administrators configure the app. You will see the tab whatever access you have, but unless you are an administrator it holds only an About panel with version and support details, so there is nothing there you need.

Individual goals open as records, so you can also reach a goal from a report, a search result, or a link a colleague sends you — you do not have to go through the app.

If your org runs in a language other than English, you may find that some labels and screens still appear in English. Translations are activated per org, so ask your administrator if you would like them switched on.

3. Seeing your own goals at a glance

Your administrator can place a component called **My Goals** on a page you already use, most usefully your Salesforce home page. If they have, your own targets are in front of you every morning without you going looking for them.



The My Goals component on a Salesforce home page, beside a performance chart

The panel summarises everything assigned to you. The coloured tiles give you the shape of things at a glance, and the counts break your goals down by status. Each card shows the current value against the target, the percentage achieved, and — most usefully — how far ahead or behind pace you are.

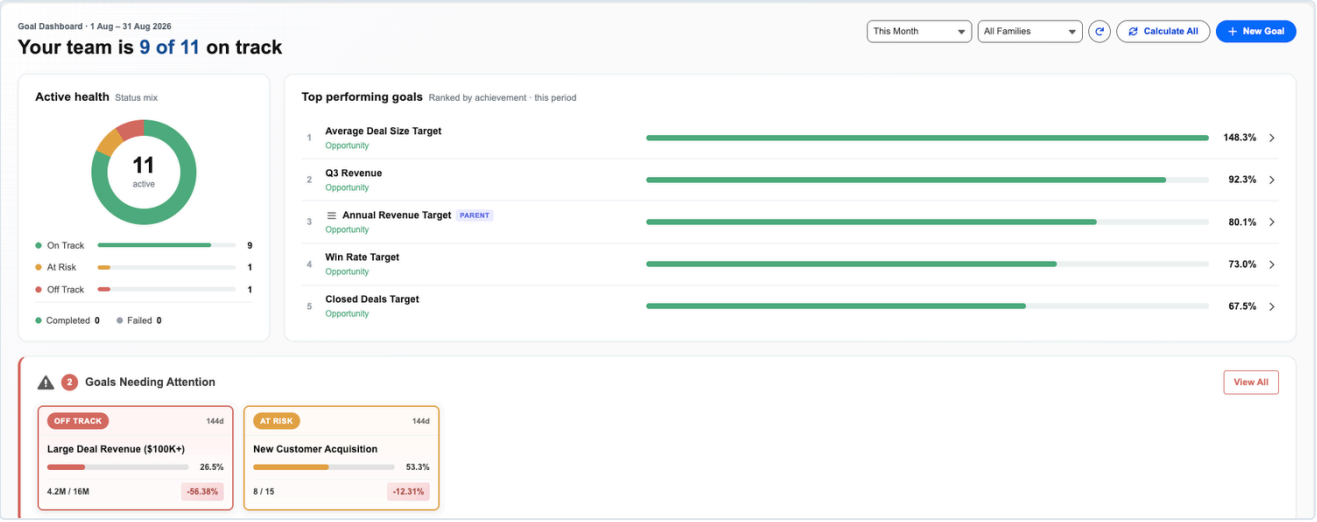
Along the top you can switch the period between month, quarter, year or all periods. The filter dropdown beside it holds two groups: **Views**, which gives you all goals, your favourites, or what is assigned to you; and **Lists**, which holds any goal lists you have access to (see section 12). The two are alternatives rather than filters that stack — picking a list replaces the view, so a list can show you goals you neither own nor are assigned. **Clear filters** appears whenever you are away from the default.

Each card carries two small buttons: one recalculates that goal, the other opens it. Whatever you last selected is remembered for next time.

If you do not have this on your home page and would like it, ask your administrator — it takes them a couple of minutes to add, and it can go on any page, not just the home page.

4. The team dashboard

The **AZ Goals** tab opens the dashboard, which does for a whole team what My Goals does for one person.



The AZ Goals dashboard, showing overall health, top performing goals and goals needing attention

The headline tells you how many goals are on track out of the total. **Active health** breaks the whole portfolio down by status. **Top performing goals** ranks by achievement, so you can see what is working. **Goals Needing Attention** surfaces anything At Risk or Off Track, with how far behind it is — this is the part most people check first.

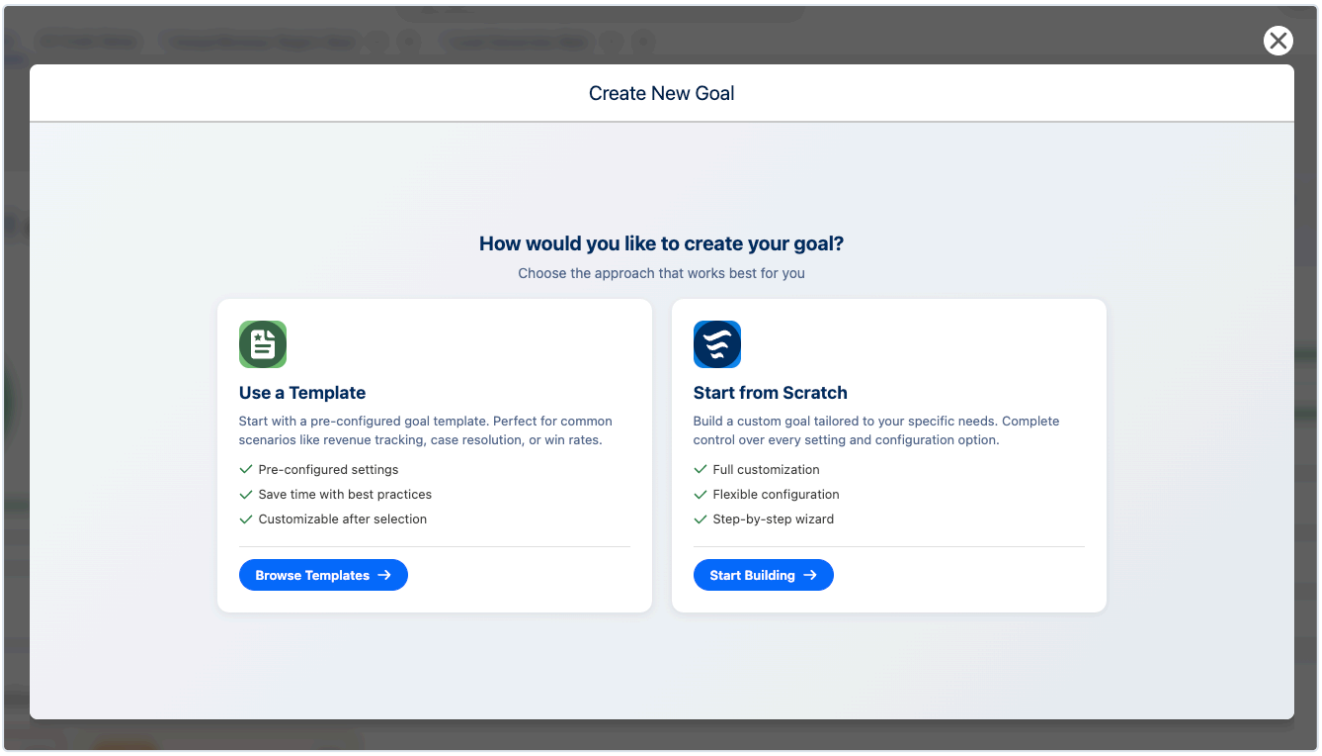
The controls at the top right let you change the period, filter by goal family, refresh the stored figures, run **Calculate All**, or create a goal. Below the header sits a strip of chips for scoping the whole dashboard to a goal list — see section 12.

You can also select rows in the table with the checkboxes, which brings up a bar for adding everything selected to a list or toggling favourites in one go.

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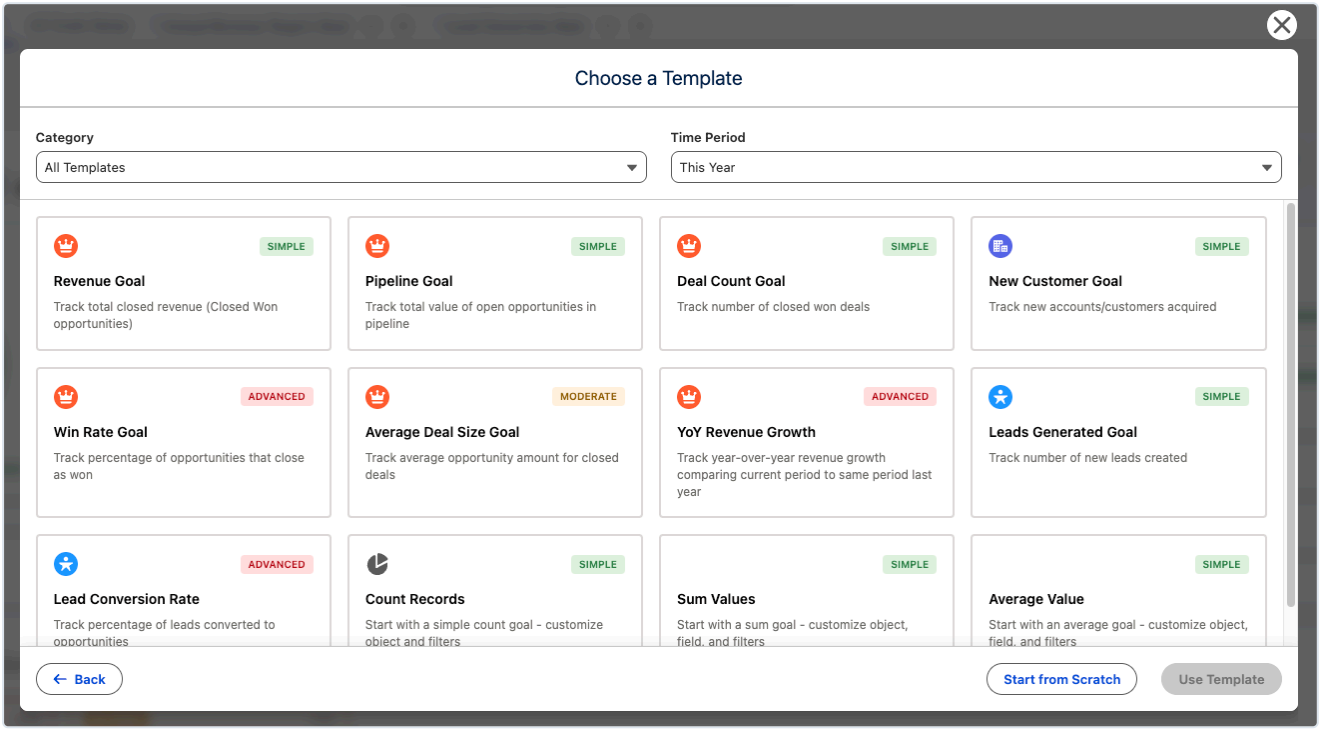
5. Creating a goal from a template

Templates are the fastest way to start, and the best way to learn what the product can do. Click **New Goal** and choose **Use a Template**.



The New Goal dialog offering a template or building from scratch

You will see a catalogue of ready-made goals, filterable by category and time period, each marked simple, moderate or advanced.



The template catalogue, showing revenue, pipeline, win rate and other pre-built goals

Revenue, pipeline, deal count, new customers, win rate, average deal size, year-over-year growth, leads generated, lead conversion rate, cases resolved and case resolution rate are all covered, alongside generic starting points for counting records, summing a field, or averaging a value — fourteen in total.

Pick the closest match, adjust the target and the dates, and save. Everything a template sets can be changed afterwards — a template is a head start, not a constraint.

6. Creating a goal from scratch

Choose **Start from Scratch** when nothing in the catalogue fits. You will be asked for the following.

What to measure. Pick the object, then the field to measure. Only objects your administrator has allowed appear here.

Which date decides whether a record counts. Every goal needs a date field — a close date, a created date, a resolution date. A record counts toward the goal when the value in that field falls inside the goal's date range. Choosing the wrong date field here is the single most common reason a goal calculates to zero.

The date range. Start and end dates. These also drive the pace line described in section 9.

How to calculate. Seven options:

Calculation	What it does
Count	Counts matching records
Sum	Adds up a field across matching records
Average	Averages a field across matching records
Max / **Min**	Takes the highest or lowest value of a field
YoY Same Period	Compares this period against the same period last year
YoY Rolling 12M	Compares a rolling twelve months against the previous twelve

The target. Either an absolute value — €6,000,000, 40 deals, 150 leads — or a percentage. Percentage targets are covered in section 8.

Which direction counts as success. Most targets are something you want to reach or exceed. Some are the opposite: keep churn under 5%, keep days-to-close under 30, keep cost per case down. Set the direction to **Below** for those, and the goal treats getting further under the number as doing better — the achievement figure, the pace comparison and the status all follow suit.

Who owns it. Assign the goal to a user. You can also give it a goal family, which is simply a label for grouping related goals so they can be filtered together later.

Who can see it. Private, the default, means the goal is visible to you, whoever it is assigned to, and their management chain. Public means everyone in your org can see it, though only you and administrators can edit it.

7. Choosing which records count

Conditions are optional. A goal with none counts every record on its object that falls inside its date range, which is exactly what you want for something like "all new leads this quarter". Add conditions only when you need to narrow that down — closed-won opportunities only, cases from one region, accounts above a certain size.

Where you do need them, add conditions on the goal, choosing a field, an operator and a value. Conditions fall into four groups, and the group matters:

Filter conditions narrow which records count. This is the group you will use most.

Base and **Target** conditions belong to percentage goals, and are explained in the next section.

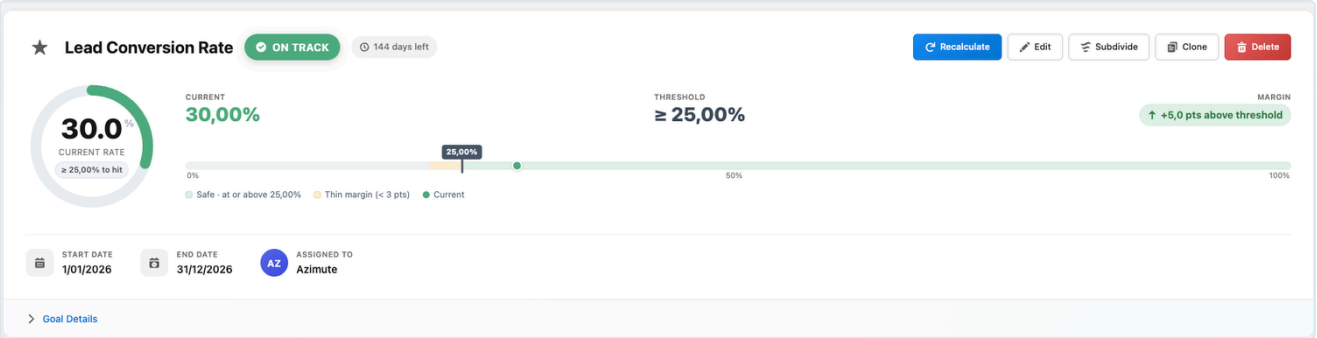
Parent conditions filter on a field of a related parent record, so you can build a goal about opportunities that is scoped by something on the account — an industry, a region, a tier.

By default conditions combine with AND, so a record must satisfy all of them. Where you need something more involved, custom filter logic lets you express combinations such as "the first condition, and then either the second or the third". Your administrator caps how many conditions a single goal can carry, at twenty unless they have changed it.

If a goal is not returning what you expect, remove conditions one at a time until it does. Whichever one you removed when the number jumped is the one to look at.

8. Goals where the target is a percentage

Some targets are not a total at all. "Keep lead conversion at or above 25%." "Resolve 90% of cases inside SLA." "Ensure 80% of key accounts have an open opportunity." These are ratios, and a standard report cannot track them as a living target.



A percentage goal showing the current rate against its threshold, with the margin above it

Set the target type to percentage and AZ Goals asks you for two things: the **base**, which is the denominator, and the **target**, which is the numerator. For a win rate, the base is every closed opportunity and the target is the ones that closed won. You define each with Base and Target conditions.

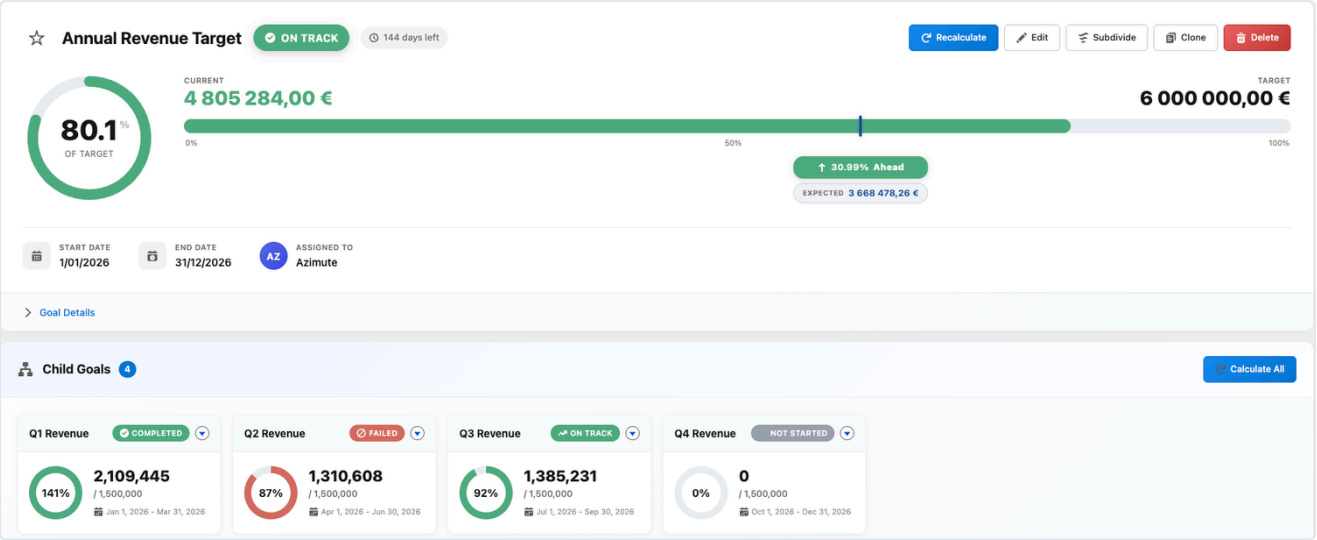
You then choose whether the ratio should be measured by **record count** or by **summing a field** — the difference between "what proportion of deals did we win" and "what proportion of pipeline value did we win" — and whether you need to stay **above** the threshold or **below** it. Above suits conversion and compliance rates; below suits things like error or churn rates.

The result reads as a rate rather than a total. The screen shows the current rate, the threshold you must hold, and your **margin** — how many percentage points of headroom you have. The band beneath makes the same point visually, with a thin-margin zone that warns you when you are close to the line even though you have not crossed it.

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9. Reading progress and status

Open any goal to see the full picture.



A goal detail view showing achievement against target, the pace marker, and four quarterly child goals

The dial gives you achievement as a percentage of target. Beside it, the current value and the target in full. The bar underneath is where the useful information is: alongside your progress it marks the point you should have reached by today, labelled with how far **ahead** or **behind** you are and the value that would have put you exactly on pace.

That distinction matters. Achievement tells you how much of the target you have banked. The pace comparison tells you whether that is good news. Forty per cent of an annual target is excellent in February and alarming in November, and it is the pace comparison — not the raw percentage — that drives the status:

Status	What it means
Not Started	No progress recorded yet
On Track	At or ahead of the pace needed to finish on time
At Risk	Behind pace, but recoverable
Off Track	Significantly behind pace
Completed	Target reached
Failed	The goal ended without reaching its target

So a goal can read On Track at 40% achieved, and Off Track at 70%. If that ever looks wrong, check how much of the period has elapsed before assuming the number is broken. Your administrator sets the exact thresholds, so the boundaries may differ from another org's.

Once a goal's end date has passed, the date reads **Ended 3 days ago** rather than describing it as overdue. Whether that ending was good or bad is carried by the status badge — Completed or Failed — not by the date.

Last calculated. In the goal's header, beside the status badge, you will see how long ago the figures were worked out — "Last calculated: 12 minutes ago", with the exact timestamp if you hover it. This is the first thing to check when a number looks wrong: quite often it is simply older than the data. It appears once a goal has been calculated at least once.

Going down instead of up. Not every target is something you want to increase. A goal can be set to succeed by staying **below** its target — error rates, churn, days to close, cost per case. When a goal is set that way, dropping further below the number counts as doing better, and the status and pace comparison follow the same logic in reverse.

Deviation. Where you see a deviation figure, positive always means ahead of plan and negative means behind, whichever direction the goal is aiming in. You do not have to remember which way round it is for a given goal.

10. Breaking a goal into smaller goals

An annual target that lives as a single number is hard to act on. AZ Goals lets you split any goal into children — quarters, months, teams, individuals — and keeps the parent in step automatically.

Open the goal and click **Subdivide**.



The Subdivide Goal dialog, allocating an annual target across four quarters with sliders

Choose the levels you want, then set how the parent's target is distributed. Drag the sliders, or type the percentages directly. **Distribute Evenly** splits the target equally in one click, which is the right starting point before you weight it for seasonality — the example above gives Q3 thirty-five per cent because that is when the business peaks.

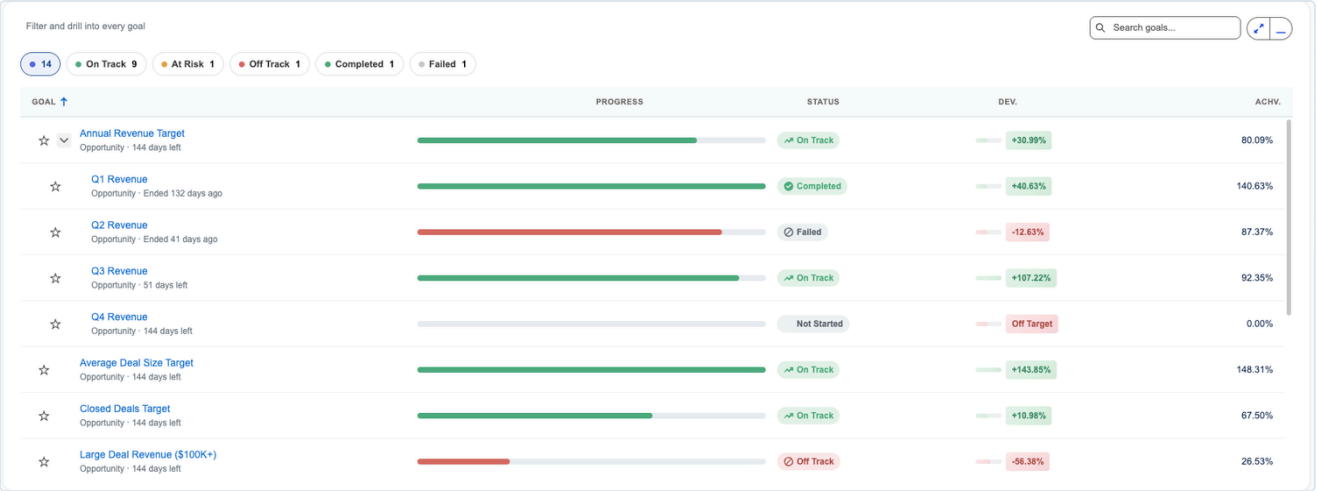
The running total at the top right must reach 100%, and the dialog will not let you create a hierarchy that does not add up. If your allocation already exists in a spreadsheet, **Paste from Spreadsheet** takes it directly rather than making you re-enter it. Click **Create Goal Hierarchy** when you are happy.

From then on, each child tracks its own period or team independently, and the parent's achievement is aggregated from its children. You never update the parent by hand. Hierarchies can go deeper than one level, so a year can become quarters, and each quarter can become months or reps.

Conditions and filter logic from the parent carry down to the children, so a hierarchy built from a carefully scoped parent goal stays correctly scoped all the way down.

11. Finding goals

The **AZ Goals** tab holds the full list of everything you can see.



The goal list, filtered by status, with a parent goal expanded to show its quarterly children

The chips across the top filter by status — click At Risk to see only what needs attention. Search by name, sort by any column, and expand any parent goal with the arrow beside it to see its children inline without leaving the list.

Each row shows the goal's family — or its object, where no family is set — beneath its name, so you can tell at a glance what a target relates to. **Dev.** shows the deviation from pace and **Achv.** the percentage achieved.

Star any goal to make it a favourite, which pins it to the favourites filter in My Goals. Most people end up with a handful of starred goals they check daily and leave the rest to the alerts.

For anything more structured than favourites — a set of goals you review together in a particular meeting, for instance — use goal lists, described next.

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12. Goal lists

Goal families group goals by an attribute they already share. Favourites are a personal shortlist. Goal lists are for everything in between — an arbitrary set of goals you choose, named and coloured, because that is how you actually review them. The set you look at in the Monday pipeline meeting. The goals belonging to one region. The handful the board asks about.

A list can hold goals from any family and any period, and **a goal can be in as many lists as you like**. A list is a filter rather than a folder: putting a goal in a list changes nothing about the goal, and deleting a list never deletes any goal in it.

Where lists show up

On the dashboard, a strip of chips sits at the bottom of the header — All goals, Favorites, then one chip per list you have access to. Click a chip and the entire dashboard narrows to that list: the headline count, the health donut, the top performers, the attention cards and the table all follow. Click it again, or choose

All goals, to clear. A chip carries a red badge when the list contains anything At Risk or Off Track, so you can see which of your lists needs attention without opening any of them.

In My Goals, lists appear in the filter dropdown under a **Lists** heading, alongside the standard Views.

On a goal, the lists it belongs to are shown as small badges in the progress panel, with **Add to list** beside them.

Whatever you last selected is remembered per person and per screen, so the dashboard opens where you left it. Your choice does not affect what anyone else sees.

Creating a list and putting goals in it

Click **New list** on the dashboard chip strip, or open **Manage lists…** for the full dialog. Give it a name and pick one of seven colours. The colour is worth a moment's thought — it is what makes a chip findable at a glance.

There are three ways to add goals, and they suit different moments:

From a goal. Open it and click **Add to list**. Best when you are already looking at something and realise it belongs in a set.

In bulk from the dashboard. Tick the checkboxes on the rows you want, then use **Add to list** in the bar that appears. Best for assembling a list quickly. The same bar can toggle favourites for everything selected.

From the Manage lists dialog. Its **Add goals** pane lets you search and filter candidates by family, period and assignee. Best when you are building a list deliberately rather than from what happens to be on screen.

To take a goal out, click the small remove control on its badge on the goal page, or manage membership from the dialog.

One behaviour worth knowing about

Lists understand hierarchies. Add a parent goal and every goal beneath it joins the list too. That is almost always what you want — a list of "EMEA revenue" should contain the quarters under the annual goal, not just the annual goal.

The consequence is worth remembering: **removing a parent removes everything beneath it**, even a child you had added on its own earlier. The list does not record how each goal got there.

And if you create a new child under a parent that is already in a list, the new child joins that list automatically. A list built around a hierarchy stays complete as the hierarchy grows.

Sharing a list

A new list is **private** to you. You can change that in the Manage lists dialog:

Visibility	Who can see it
Private	Only you
Shared	The people and public groups you choose
Public	Everyone in your org

For Shared and Public you also choose what recipients can do: **View** lets them look, and **View & edit** additionally lets them add and remove goals. Renaming, recolouring, resharing and deleting stay with you as the owner, whatever access level you grant.

Two things behave in ways people find surprising, so they are worth stating plainly:

Going back to Private forgets who you had shared with. Access is revoked immediately, and if you later switch back to Shared you start from an empty audience rather than the old one.

A list can look different to different people. Sharing a list does not grant access to the goals inside it — Salesforce sharing still applies to each goal individually. So a list you can see four goals in might legitimately show only two to a colleague who cannot see the other two. The list is not hiding anything; the goals were never visible to them.

Only the owner can delete a list. Deleting removes the list and everyone's access to it, and leaves every goal exactly as it was.

A note on permissions

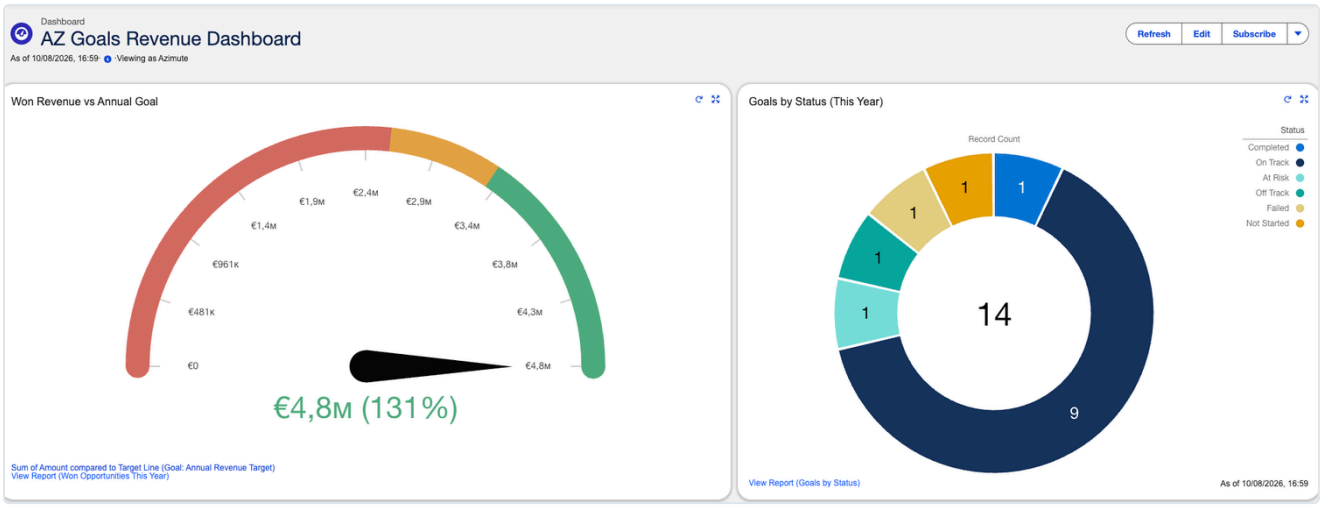
Goal lists are the one part of AZ Goals that everybody can create, including people with read-only access to goals themselves. If you can see goals, you can organise them into your own lists — you simply cannot change the goals.

Lists are limited to 80 characters for a name and 255 for a description, and you can add up to 1,000 goals to a list in a single action.

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13. Using goals in reports and dashboards

Goals are ordinary Salesforce records, which means everything you already know about reporting applies to them.



A standard Salesforce dashboard combining a revenue gauge against an AZ Goals target with a goals-by-status breakdown

Build a report on Goal, group and chart it however you like, and drop it onto any dashboard next to the rest of your reporting. You can also reference a goal's target as a target line on a report of the underlying records, which is what the gauge above is doing — won revenue measured against the annual goal, in a standard Salesforce dashboard component.

There is no export step and no connector. If you can report on it in Salesforce, you can report on your goals the same way.

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14. Keeping numbers current

Recalculating is now something you ask for rather than something that happens whenever you open a page. That is deliberate: it makes the dashboard open quickly, and it means the figures you are looking at do not shift underneath you while you read them. The trade is that you should know how to refresh them, and how to tell how old they are.

Reading stored figures. The **Refresh** button on the dashboard re-reads what has already been calculated. It is instant and it recalculates nothing — useful when someone else has just run a calculation and you want to see the result.

Recalculating everything. Calculate All on the dashboard is the control that actually recalculates, for the period you have selected. A banner appears while it runs, with a count of how many goals have been processed, and you can carry on working while it finishes.

Recalculating one goal. Open it and click **Recalculate**. This does the goal *and every goal beneath it*, so recalculating an annual target also refreshes its quarters. There is no separate button for the children because it would be doing the same job — and running one without the other is how a parent and its children end up disagreeing.

How long it takes. Most goals come back immediately. Percentage goals are worked out in the background because they involve two passes over your data, so those will tell you the calculation has

been queued and update themselves shortly afterwards.

Automatically. Your administrator can enable overnight recalculation, hourly recalculation during business hours, or both. Where those are switched on, your figures are current each morning without anyone doing anything, and the **Last calculated** line on each goal tells you when they were last worked out.

Data changes in Salesforce do not update a goal the instant they happen. A deal that closes at 10:47 appears in the goal at the next recalculation, scheduled or requested.

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15. Common questions

Why is my goal showing zero? Usually the date field. Check that the field you chose actually holds dates inside your goal's range — a revenue goal using close date will show nothing if all the opportunities are still open. After that, suspect the conditions; relax them one at a time to find the culprit.

Why does the number not match my report? Compare three things: the date field, the date range, and the conditions. A goal counting on close date and a report filtered on created date will legitimately disagree. Also check whether the goal has recalculated since the data changed.

Why does this say Off Track when we are at 70%? Because 70% is measured against the pace for today, not against the finish line. See section 9.

Can I track something on a custom object? Yes, as long as your administrator has added it to the allowed list. Custom objects behave exactly like standard ones.

Can I change a goal after creating it? Yes — target, dates, conditions and assignment can all be edited, and the goal recalculates against the new configuration. Note that changing a parent's target does not redistribute existing children automatically; subdivide again if you want to reallocate.

Who can see my goals? Private goals are visible to you, whoever the goal is assigned to, and their management chain. Public goals are visible to everyone in your org. You control this with the visibility field on each goal.

I cannot create goals. Creating requires the Creator or Administrator permission set. If you only have the User permission set, you can view goals, favourite them and organise them into your own goal lists, but not create or change the goals themselves. Ask your administrator.

Why does a shared list show fewer goals to my colleague than to me? Because sharing a list does not share the goals in it. Each goal still follows its own visibility, so a colleague sees only the members they already had access to. If they should see the goals themselves, that is a change to the goals' visibility, not to the list.

I removed one child goal from a list and they all disappeared. You most likely removed the parent. Lists treat a hierarchy as a unit — adding a parent adds everything beneath it, and removing a parent

removes the whole branch. Add the individual goals back, or add the parent again and remove the ones you do not want.

Why do the figures not update when I open the dashboard? Opening a page no longer triggers a recalculation, which is why it loads quickly. Use **Calculate All** to recalculate, or **Refresh** to re-read figures someone else has just calculated. Every goal shows when it was last calculated.

Support

AZMT Digital Solutions, Lda · support@azimute.eu

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