



NEOMATIC

build your business with NEO experience

NEO.CPO Installation Guide

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Installation

We only allow to install our Apps via the AppExchange.

Navigate to the AppExchange: <https://appexchange.salesforce.com/>

Search for NEOMATIC

Q neomatic

X

Results for "neomatic"

Apps & Solutions (4)

Consultants (1)

Q Search filters...

^ Pricing

☐ Free

☐ Freemium

☐ Paid

☐ Paid Add-On Required

☐ Discounts for Nonprofits

^ Rating

☐ 5 stars & Up

☐ 4 stars & Up

☐ 3 stars & Up

☐ 2 stars & Up

☐ 1 star

Sort by Relevance

NEO.CPO - Customer Portfolio ...

NEOMATIC AG

5 (2)

NEO.CPO is a Salesforce UI component that optimizes a customer 360 view. It visualises essential elements such as opportunities and contracts. NEO.CPO caters to all...

Sales Productivity Sales Intelligence

NEO.UMD - Universal Mini Das...

NEOMATIC AG

No Ratings

NEO.UMD delivers focused, customizable mini dashboards in Salesforce, displaying your KPIs where needed. Solve data overload and accessibility issues with quick, context-speci...

Sales Intelligence Data Visualization

NEO.PRM - Pro-active Sales Pa...

NEOMATIC AG

No Ratings

NEO.PRM - pro-active Partner Relationship Management (PRM) for insurance sales. Efficiently manage all sales partners, brokers and cooperative sales organizations to...

Productivity

Partner GTM Resources

Salesforce Labs

3.67 (3)

Grow faster and become a powerful marketer. This app seamlessly integrates into your Sales Cloud and allows you to market the latest Salesforce product and industry conte...

Click the "NEO.UMD - Universal Mini Dashboards" Tile.



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NEO.UMD - Universal Mini Dashboards

By NEOMATIC AG

Customizable Salesforce KPIs Dashboard – Boost Visibility & Decisions

Component No Ratings

Get It Now

Try It Free



Freemium

Payment required to increase usage, users, or features. Discounts available for nonprofits.
[Pricing Details](#)

Industries

Horizontal Product

Business Need

Sales Intelligence

Data Visualization

Dashboards & Reports

Requires

Sales Cloud

Compatible With

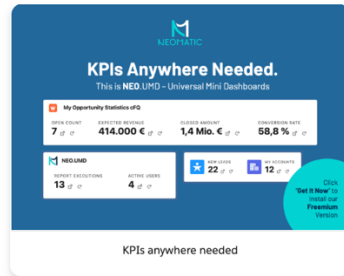
Sales Cloud

Service Cloud

Experience Cloud

[More Details](#)

NEO.UMD delivers focused, customizable mini dashboards in Salesforce, displaying your KPIs where needed. Solve data overload and accessibility issues with quick, context-specific insights for better decisions and productivity. Set up in minutes.



Click the "Get It Now" Button.





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We recommend installing the App on your sandbox first.

×

Where do you want to install this package?

Install in a Production Environment

Install this package in the org where you or your users work, including Developer Edition orgs.

* Connected Salesforce Accounts ⓘ

Choose...

Don't see your account? [More Info](#)

Install in Production

Install in a Sandbox

Test this package in a copy of a production org.

Install in Sandbox

Install in a Trial

Try this package in a free org that includes sample data.

Install in Trial

Cancel

We recommend installing the App for Admins only.

Install SF_CPO_App
By

☒ Install for Admins Only

☐ Install for All Users

☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
SF_CPO_App		2.1.0	2.1





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Permission Sets

With our App you will receive two permission sets to be used to assign to your users.

- (Optional) Clone the provided permission set
- (Optional) Modify the set as needed (no changes should be necessary)
- Assign the permission set to all relevant users

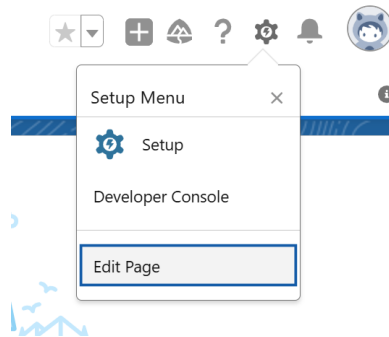
Licenses

There is no license assignment needed on sandboxes. Additional steps may be necessary for productive orgs, depending on the licensing model you have chosen with us.

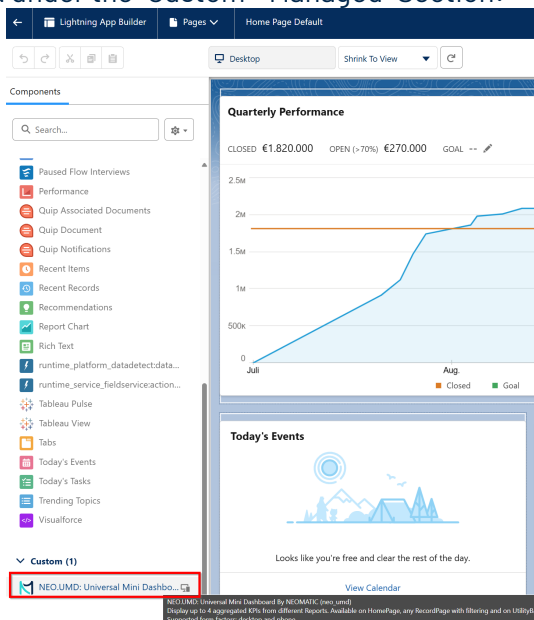
Administration

Adding the UMD Component

- Open the Lightning App Builder for the Homepage, App page or Record page where the component is to be added



- Drag the component from the component library on the left on to the page. The UMD component will be listed under the "Custom - Managed" Section:

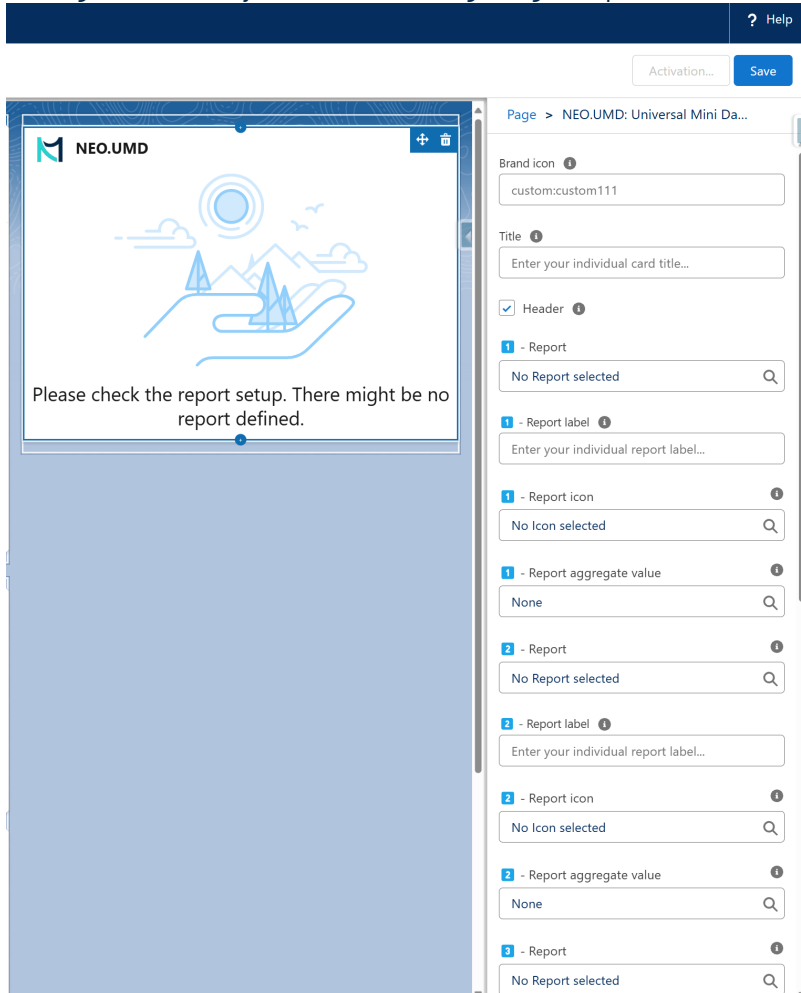


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Configuring the component

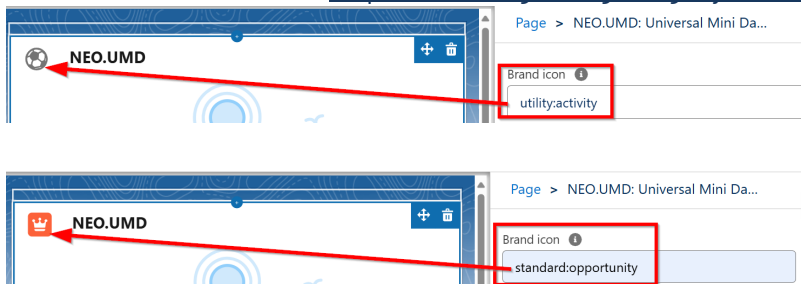
- Configure it like any other custom Lightning component via the settings area on the right



- Brand icon

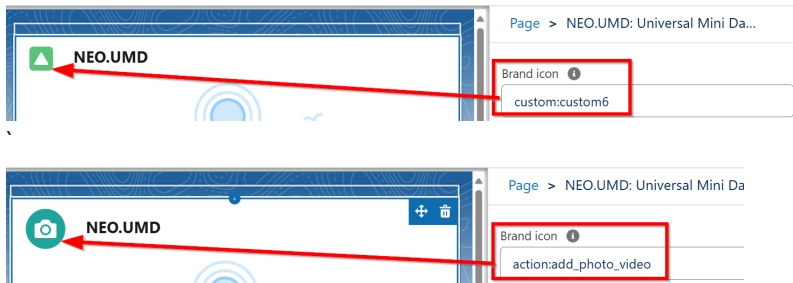
It is possible to overwrite default NEOMATIC logo with SF icons (utility / standard / custom / action)

List of all available icons: <https://www.lightningdesignsystem.com/icons/>

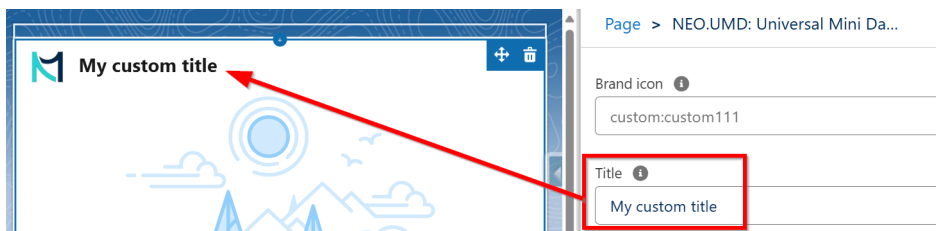


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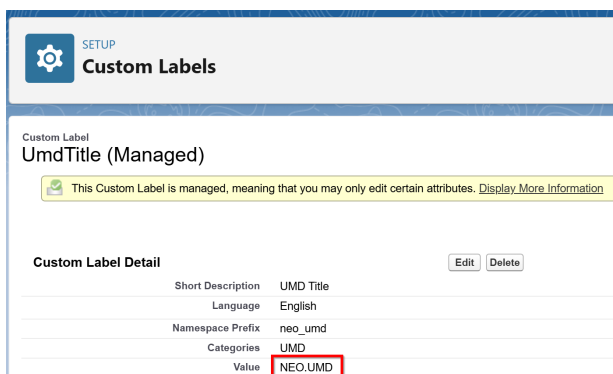
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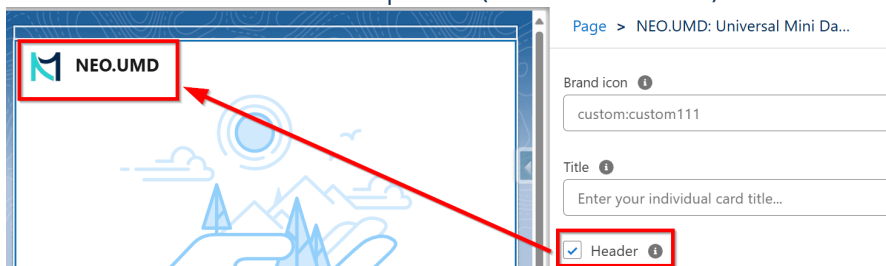
- **Tilte**
It is possible (optional) to overwrite default Report Title via Title textbox



but recommended is to modify it via Custom Label (with translations if required)



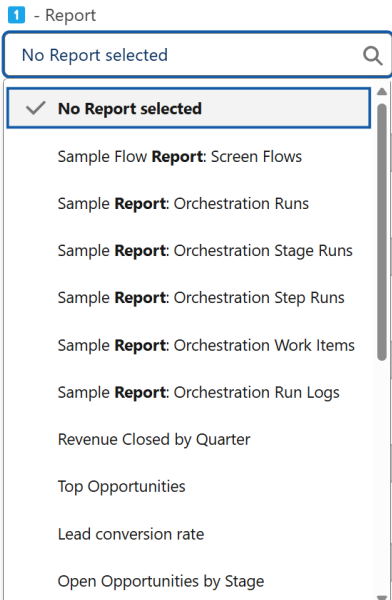
- **Header**
Whole header of the UMD component (Brand icon + Title) can be hidden via this checkbox



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- Report
Add a report by selecting any of the available ones via the boxes **X-Report** (where **X** is a report number 1,2,3 &4)

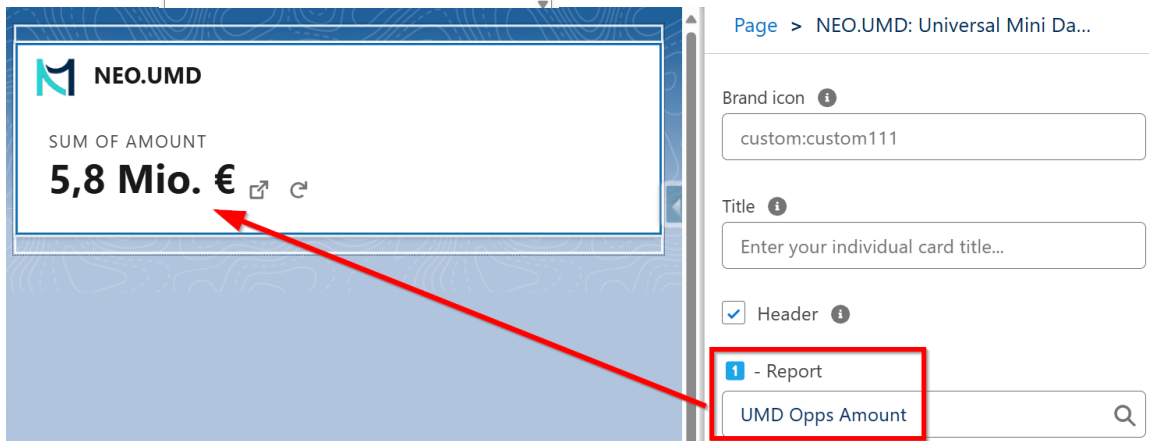


Up to **4 reports** can be configured

2 - Report

3 - Report

4 - Report



Report KPI values will be rendered from left to right:



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The screenshot shows the NEO.UMD dashboard with four KPI cards at the top: SUM OF AMOUNT (5,8 Mio. €), AVERAGE AMOUNT (185.806 €), RECORD COUNT (31), and REPORT COUNT (20). Below these are three placeholder boxes labeled 'Add Component(s) Here'. On the right, a configuration panel for 'NEO.UMD: Universal Mini Da...' lists four reports. Red boxes highlight the 'Report label' field for each report, and red arrows point from these fields to the corresponding KPI cards on the dashboard.

Report	Report label	Report icon	Report aggregate value
1 - Report	UMD Opps Amount	No icon selected	1st aggregated KPI
2 - Report	UMD Opps Amount	No icon selected	2nd aggregated KPI
3 - Report	UMD Opps Amount	No icon selected	3rd aggregated KPI
4 - Report	UMD Reports Record Count	No icon selected	

- Report Label
Default KPI label 1,2,3 & 4 from selected report 1,2,3 & 4 can be overwritten via this text field (it is to be capitalized)

The screenshot shows the 'Opportunities pipeline' dashboard with a KPI card for 'SUM OF OPP AMOUNT' (5,8 Mio. €). A red box highlights the label 'SUM OF OPP AMOUNT' on the card, and a red arrow points from the 'Report label' field in the configuration panel to it. The configuration panel on the right shows settings for the dashboard, including a brand icon, title, header, and a list of reports. The 'Report label' field for the first report is highlighted with a red box.

Report	Report label
1 - Report	sum of opp amount

- Report icon
Individual icon can be assigned for each UMD KPI value from the selected report 1,2,3 & 4



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The screenshot shows the 'Opportunities pipeline' dashboard. A red box highlights the 'Report icon' (a crown icon) in the top left corner. A red arrow points from this icon to a search bar on the right side of the dashboard. The search bar contains the text 'standard:opportunity'. Below the search bar, a list of results is shown, including 'standard:opportunity', 'standard:opportunity_contact_role', and 'standard:opportunity_splits'.

- Report aggregate value
Up to 9 KPI values from report can be selected **(only available in freemium version)**

The screenshot shows the 'Opportunities pipeline' dashboard. A red box highlights the 'Report aggregate value' (a crown icon) in the top left corner. A red arrow points from this icon to a search bar on the right side of the dashboard. The search bar contains the text '1st aggregated KPI'. Below the search bar, a list of results is shown, including '1st aggregated KPI', '2nd aggregated KPI', and '3rd aggregated KPI'.

Report: Opportunities

 **UMD Opps Amount**

Test report for testing NEO UMD component on Account Record Page

1st agg KPI 2nd agg KPI 3rd agg KPI

Total Records	Total Amount	Average Amount	Average Probability (%)
31	5.760.000,00 €	185.806,45 €	81 %

last agg KPI

	Account Name	Opportunity Name	Amount	Expected Revenue	Probability (%)
1	United Oil & Gas Corp.	United Oil Office Portable Generators	125.000,00 €	112.500,00 €	90 %
2	Express Logistics and Transport	Express Logistics Standby Generator	220.000,00 €	220.000,00 €	100 %
3	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	15.000,00 €	9.000,00 €	60 %





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Once **Page is saved and activated** via App bulder than UMD component will be rendered.

Each KPI value will be followed with **two buttons**:

1. Navigate to the report of the KPI
2. Refresh the report

