AZ Goals

INSTALLATION & ADMINISTRATION

Installation & Administration Guide

Package version 1.72.0

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1. Before you begin

AZ Goals is a native Salesforce application. It installs entirely inside your org, sends nothing to any external service, and uses your existing Salesforce login. There is no integration to build and no separate system to maintain.

Supported editions: Enterprise, Unlimited, Performance and Developer Edition.

Who does the install: a Salesforce administrator. You will need the usual permissions to install an application, assign permission sets and licences, and edit Lightning pages.

How long it takes: the install itself takes five to ten minutes. Setting it up properly takes another twenty minutes or so. Sections 2 to 6 are all required; everything after that is optional and can be revisited later.

Two of those steps are easy to skip and both of them matter. Section 5 turns on the goal page, without which the product looks far less capable than it is. Section 6 tells AZ Goals which objects it is allowed to measure — until you do it, nobody can create a goal at all.

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2. Install from AppExchange

1. Log in to the Salesforce org where you want AZ Goals. If you would rather try it against a copy of your real data first, install into a sandbox.
2. Go to **AppExchange**, search for **AZ Goals**, and open the listing.
3. Click **Get It Now** and choose production or sandbox.
4. When asked who to install for, choose **Install for Admins Only**. This is not a restriction — you decide who gets access afterwards, in section 4 — it simply keeps things tidy while you set up.
5. Approve the access review and click **Install**. You will get an email when it finishes.
6. Check the result under **Setup** → **Installed Packages**. AZ Goals should be listed with version 1.72.0.

Installation adds the **AZ Goals** app to your App Launcher, with two tabs: **AZ Goals** for the dashboard and goal list, and **AZ Goals Setup** for the configuration screens described in this guide.

A fresh installation starts with no objects enabled for measurement. Before anyone can create a goal you need to allow at least one object, which takes a minute and is covered in section 6.

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3. Your subscription and free trial

Every installation starts with a **14-day free trial** with every feature unlocked. It begins the day you install and needs no activation.

Once the trial ends, each person who uses AZ Goals needs a licence assigned to them. A permission set on its own is not enough — someone with the right permission set but no licence will be turned away, so plan to do both. Assigning licences is covered as part of section 4.

You can manage or change your subscription, and see how many licences you hold, from **My Installs and Subscriptions** on AppExchange.

If a trial ends before a subscription is in place, AZ Goals stops opening, but nothing is lost. Every goal, target and piece of history stays exactly as it was, and starting a subscription restores access with all of it intact.

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4. Give people access

Access has two parts, and both are needed: a **licence**, which entitles someone to use the app at all, and a **permission set**, which decides what they can do with it.

Assign a licence

1. Go to **Setup** → **Installed Packages**.
2. Find **AZ Goals** and click **Manage Licenses**.
3. Click **Add Users**, select the people who need AZ Goals, and save.

During the trial everyone can get in without this step, which is why it is easy to miss. The day the trial ends, anyone without a licence loses access — so if you are rolling out to a team, assign their licences at the same time as their permission sets rather than later.

Assign a permission set

Assign one to each person from **Setup** → **Permission Sets** → *(choose the set)* → **Manage Assignments** → **Add Assignments**.

Permission set	Give it to	What they can do
AZ Goals Administrator	Whoever sets the app up, plus operations leads who oversee everyone's targets	Everything, including all the configuration in this guide
AZ Goals Creator	Managers and anyone who sets their own targets	Create goals, edit and delete their own, and edit goals belonging to people below them in the role hierarchy
AZ Goals User	Executives and anyone who only needs to look	View goals, track progress, mark favourites, and build their own goal lists. Cannot create or change goals

Most rollouts end up mostly Users, with Creators for team leads and a couple of Administrators.

Everyone sees the **AZ Goals Setup** tab, whichever set they have, but only Administrators see anything configurable on it. Creators and Users get a single About panel with version and support details, which is harmless — there is no need to hide the tab from them.

Note that goal lists, described in section 12, are the one thing every permission set can create. Somebody with read-only access to goals can still organise those goals into their own lists. This is deliberate.

You will also see a set named **AZ Goals Agentforce User**. It is left over from a retired feature, does nothing at all, and cannot be removed from a published app. Ignore it and never assign it.

5. Turn on the goal page

This step matters more than its length suggests. AZ Goals includes a purpose-built page for viewing a goal — the progress dial, the pace marker showing whether you are ahead or behind, and any child goals beneath it. Until you activate that page, anyone opening a goal sees a plain Salesforce record page with fields on it and none of the visual progress tracking. It is the most common reason a new installation underwhelms.

Activation happens inside the Lightning App Builder, not on the list of record pages. Open the page first, then activate it:

1. Go to **Setup** → **Object Manager** and open **Goal**.
2. Click **Lightning Record Pages**.
3. Open **Goal Record Page** in the Lightning App Builder — click the page name, or use its **View** action. Do not stop at the list row.

4. In the App Builder header, click **Activation**.
5. Choose **Assign as Org Default**, with **Desktop** selected, and click **Save**.

If the list only offers Clone and View, nothing is wrong. A record page that arrives with a managed package often shows just those two actions, and there is no Activation button among them. Activation is in the App Builder toolbar, which is why step 3 opens the page. You do not need to clone the page first — the packaged page activates directly.

Open any goal afterwards and you should see the progress view rather than a list of fields. If you have your own record page for Goal that you would rather keep, you can instead copy the progress component onto it using the Lightning App Builder.

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6. Choose which objects goals can measure

Goals can only measure objects you have explicitly allowed. This keeps the choice short and relevant for your users, and stops goals being pointed at objects you would rather they left alone.

A fresh installation has an empty list, and an empty list means nobody can create a goal — the object picker in goal creation will have nothing in it. Do this before you tell anyone the app is ready.

1. Open the **AZ Goals** app, then the **AZ Goals Setup** tab.
2. Go to **Goal Settings**. **Allowed Target Objects** is the first section on that panel.
3. Click **Add Object**, pick what you want to allow, and save.

Most organisations start with Opportunity, Account and Lead, then add Case, Contact, Task and Event if they are relevant. Add your own custom objects here too — they behave exactly like the standard ones, and this is where a lot of the product's value shows up for businesses that track something unusual.

Take an object off the list and no new goals can be created against it. Existing goals that use it will stop calculating, so check before removing anything.

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7. Optional: put My Goals on the home page

Your users will get more out of AZ Goals if their own targets are in front of them without having to go looking. The **My Goals Dashboard** component shows a person their goals, their progress, and how far ahead or behind pace they are — and it can sit on the Salesforce home page your users already see every morning.

1. Go to **Setup** → **Lightning App Builder**.
2. Either edit the Home page your users already have, or click **New** → **Home Page** to create one.

3. From the component list on the left, drag **My Goals Dashboard** onto the page. It works well in a wide column beside your existing charts.
4. Save, then click **Activation** and choose who gets it — the whole org, particular apps, or specific profiles if you want to start with one team.

This is optional, and it is the single change that does most to get people using the product. The component can also be placed on an app page or a record page if the home page is already crowded.

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8. Decide who can see which goals

Every goal is either Private or Public. Private, the default, means it is visible to its owner, the person it is assigned to, and their management chain. Public means everyone in the org can see it, while only the owner and administrators can change it.

For those settings to mean anything, the org-wide default for Goal must be Private:

1. Go to **Setup** → **Sharing Settings**.
2. Find **Goal** in the Organization-Wide Defaults table and click **Edit**.
3. Set **Default Internal Access** to **Private**, then save.

If you leave it as Public Read, every goal is visible to everyone whatever its visibility setting says, because Salesforce sharing only ever adds access. Public goals are shared out automatically, and AZ Goals keeps that sharing current whenever a goal's visibility or assignment changes.

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9. Keep the numbers up to date

Opening a page does not recalculate anything. This is deliberate — it keeps dashboards fast and stops figures shifting while somebody is reading them — but it does mean you should understand where the numbers come from.

A goal recalculates when it is created, when its conditions change, and whenever somebody asks it to. Each goal displays a **Last calculated** line beside its status, which is the first thing to check when a figure looks wrong. Quite often it is simply older than the data.

Users can refresh figures themselves in two ways, and the distinction is worth passing on: **Refresh** on the dashboard re-reads figures that have already been calculated and is instant, while **Calculate All** actually recalculates. On an individual goal, **Recalculate** does that goal and every goal beneath it.

For everything else, use the schedule under **AZ Goals Setup** → **Automation**.

Frequency	When it runs	Worth using when
Daily (1:00 AM)	Overnight, at 1am	Almost always. Everyone's dashboard is current when the day starts
Hourly (8 AM – 6 PM)	Every hour, 8am to 6pm	Teams who watch progress during the day and want it to move as deals close

Scheduling is off until you switch it on, and **one frequency is active at a time** — choosing a different one replaces the existing schedule rather than adding to it. Times follow the timezone of whoever switches the schedule on, so turn it on as a user whose timezone matches your business day.

The same screen has a **Run Calculation Now** button under Manual Calculation, for an immediate refresh of everything — the thing to reach for after a data import or a bulk update. Large volumes are processed in the background without interrupting anyone, and goals are always calculated in the right order so parent totals reflect their children.

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10. Status thresholds

AZ Goals gives every goal one of six statuses: **Not Started**, **On Track**, **At Risk**, **Off Track**, **Completed** and **Failed**.

The important thing to understand — and to explain to your users — is that On Track, At Risk and Off Track are judged against **the pace needed to finish on time**, not against the final target. A goal that has reached 40% of its target is comfortably on track in February and in real trouble in November. This is what makes the status useful in the middle of a quarter, and it is behind almost every "why does this say Off Track when the number looks fine?" question you will be asked.

To change where the boundaries sit, go to **AZ Goals Setup → Goal Settings** and scroll to **Goal Status Management**, below Allowed Target Objects. Each status has a percentage range, a colour and an icon. Narrowing the At Risk band makes warnings appear earlier; widening it means fewer alerts. Set these before you roll out rather than after, because changing them changes the status of existing goals at the next recalculation.

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11. Notifications

Two things can notify your users, both under **AZ Goals Setup → Notifications**.

At-risk alerts are the standard Salesforce bell notifications, and they are on by default. They fire when a goal moves *into* At Risk or Off Track, not every time it recalculates, so a goal that stays At Risk all week

produces one alert rather than seven. By default both the goal's owner and the person it is assigned to are told; you can narrow that to one or the other.

The weekly digest is also on by default and goes out **Monday mornings at 9am**. You can change the day and time, choose who receives it, and set it to send from an organisation-wide email address so it arrives from your company rather than from an individual. The same screen has a **Send Test Email** control, which is worth using before you rely on the digest.

If alerts are not arriving, check under **Setup → Custom Notifications** that **At-Risk Goal Alert** is enabled for desktop and mobile, and that the person has not turned notifications off in their own settings.

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12. Goal lists

Goal families group goals by something they already share. Favourites are a personal shortlist. Goal lists sit between the two: an arbitrary set of goals somebody has chosen, named and coloured, because that is how they actually review them.

Most of what there is to know about lists belongs to the people using them, and the User Guide covers it. Four things are worth an administrator's attention.

Everybody can create them. All three permission sets include full access to goal lists, including AZ Goals User. Somebody with read-only access to goals can still build and share their own lists. You do not need to do anything to enable this, and there is no setting that turns it off.

Lists have their own sharing, separate from goals. A list is Private by default. Its owner can change it to Shared, choosing particular people and public groups, or Public to the whole org, and can grant either View or View & edit. Renaming, recolouring, resharing and deleting always stay with the owner.

Sharing a list does not share the goals in it. This is the one that generates support questions. Each goal still follows its own visibility, so the same list can legitimately show four goals to its owner and two to a colleague. The list is not hiding anything — those goals were never visible to that person. If somebody should see the goals themselves, that is a change to the goals' visibility, not to the list.

Lists treat a hierarchy as a unit. Adding a parent goal adds every goal beneath it, and new children created later join the list automatically. The consequence catches people out: removing a parent removes the whole branch, including a child that was added on its own earlier.

Lists allow 80 characters for a name and 255 for a description, and up to 1,000 goals can be added in a single action.

13. Sensible limits

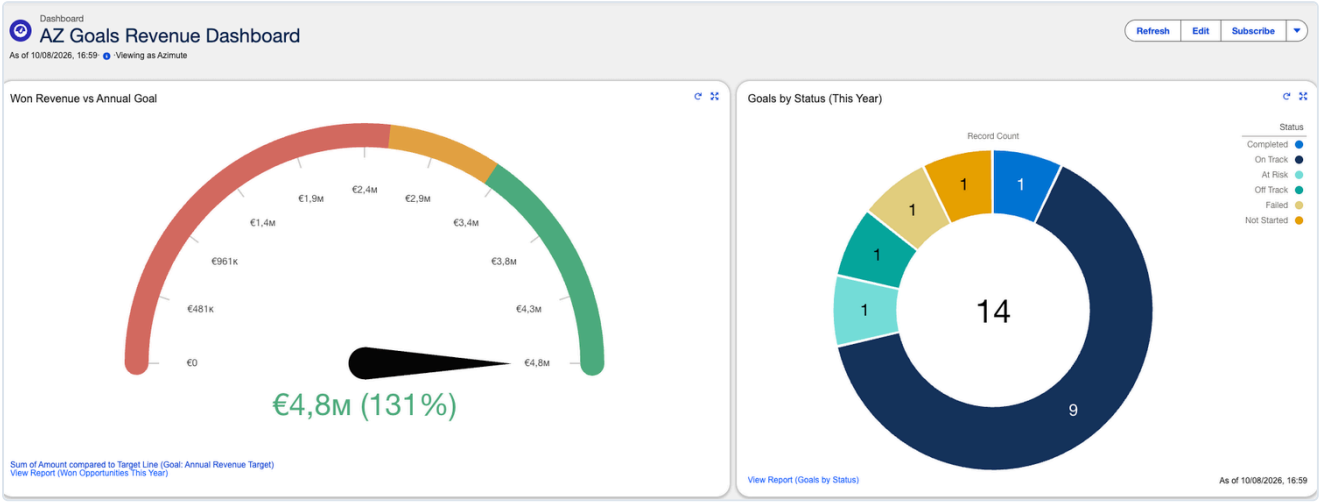
A few limits protect the org from a runaway configuration. By default one person can own up to **100 goals**, a single goal can carry up to **20 conditions**, a parent goal can have up to **50 children**, and a dashboard will load up to **1,000 goals** at a time.

These defaults are built into the app and apply with nothing configured, which is how most organisations leave them. To change any of them, go to **Setup** → **Custom Settings** → **Goal Limit Settings** → **Manage** and create the organisation-level values. The screen starts out empty on a new installation — that is expected, and it means the built-in defaults above are in force. Once you have created org-level values you can also override them for particular profiles or users.

Raise the goal and child limits if you are cascading targets across a large sales team. If recalculating unusually complex goals ever takes too long, lowering the batch size on the same screen makes each pass smaller and more reliable.

14. Goals in reports and dashboards

Goals are ordinary Salesforce records, so your users can report on them with no extra work — build a report, chart it, and put it on any dashboard beside everything else they already track.



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

Show your users this early. Nothing else makes the point as quickly that AZ Goals is part of their Salesforce rather than another tool to remember to open.

15. Upgrades and uninstalling

Upgrades install over the top of what you already have. Goals, targets, conditions, lists, settings and history are all preserved, permission set and licence assignments are untouched, and nothing needs reconfiguring. If your setup is business-critical, install the upgrade into a sandbox first.

Deleting a goal deletes its children. This is not part of upgrading, but it belongs with the other things worth knowing before they happen: removing a parent goal removes every goal beneath it in the hierarchy, and it cannot be undone. Warn anyone with Creator or Administrator access.

Uninstalling removes the app and its data, from **Setup → Installed Packages → Uninstall**. Salesforce will offer to save a copy of the data first — take it, because it is your only way back. Any scheduled refreshes are removed cleanly. Allow up to fifteen minutes.

16. Troubleshooting

Nobody can create a goal, and the object list is empty. No objects have been allowed yet. See section 6. This is the normal state of a fresh installation.

Someone cannot see the AZ Goals app. Check they have both a licence (section 4) and one of the three permission sets, then ask them to refresh their browser. If the app is missing from their App Launcher entirely, check the app's visibility for their profile.

Someone had access during the trial and lost it. They have a permission set but no licence. During the trial that works; afterwards it does not. Assign them a licence under Setup → Installed Packages → AZ Goals → Manage Licenses.

A goal opens as a plain page with no progress dial. The goal record page has not been activated. See section 5.

Goals show zero. Almost always the date field. Check that the field the goal uses actually contains dates inside the goal's date range — a revenue goal measured on close date shows nothing if all the opportunities are still open. Failing that, the conditions are excluding everything; relax them one at a time to find out which.

Everyone can see everybody's goals. The org-wide default for Goal is not Private. See section 8.

A status looks wrong. Remember it is measured against pace, not against the finish line. A goal at 45% one month into a year-long target is ahead, not behind. If the bands genuinely do not fit how your business thinks, adjust them in Goal Status Management.

Notifications are not arriving. Confirm alerts are switched on, that **At-Risk Goal Alert** is enabled under Setup → Custom Notifications, and that the recipient has not muted notifications personally. Remember they only fire on a change *into* At Risk or Off Track.

Numbers look out of date. Check the **Last calculated** line on the goal. Opening a page does not recalculate, so if no schedule is switched on under AZ Goals Setup → Automation, goals only update when somebody asks them to.

A shared list shows fewer goals to one person than another. Working as intended. Sharing a list does not grant access to the goals inside it. See section 12.

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17. Support

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Including your Org ID, the AZ Goals version from Installed Packages, and the name of an affected goal will usually let us answer on the first reply.

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