

INCLOUD LLC

anyGoal Installation Guide

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Overview

AnyGoal is a 100% native Force.com application available on the Salesforce AppExchange. With anyGoal you can set individual goal objectives based on any standard or custom object. Recognize achievement by generating custom Chatter feeds based on performance thresholds. Improve performance by always knowing where you stand compared to goal objectives and peers. Below are a few key features:

- Create custom goal definitions matching your business processes by specifying goal criteria and defining goal measurement intervals.
- View goal performance on actual and relative percentage basis making it quick and easy to compare and rank relative results.
- Recognize top performers across your organization with automatically generated Chatter feeds based on customizable goal achievement thresholds.
- AnyGoal is a 100% native force.com application allowing quick creation of custom goal definitions by specifying the goal data source (e.g. Opportunity, Lead, Quote, Widget) and the Target (e.g. User, Territory, Branch, Factory).
- Customize goal definitions to your business processes by specifying criteria so only the data you want is included in goal results. Enter goal objectives and view results by Week, Month, Every Two Months, Quarter or Year. Fiscal year based intervals are available if your organization has a fiscal calendar configured.
- Motivate employees with instantaneous access to current goal results compared to objectives and peer stack rankings on prebuilt reports and dashboards.
- Incorporate goal performance data throughout Salesforce.com in the same familiar way you work with standard objects. Goal ownership is customizable so access to goal performance results adheres to your organization's security model.
- Stay current and collaborate around goal results with real time Chatter feeds. You setup custom feed messages and the business rules triggering automatic generation of Chatter feeds.

Requirements

The following are requirements for using anyGoal:

- A salesforce.com user license for one of the following editions: Unlimited, Enterprise, Professional, Group, Force.com Platform, Developer.
- The anyGoal 30-day free trial provides unlimited access to anyGoal. To continue using after the trial is over users need an individual license assigned by clicking the Manage Licenses link next to anyGoal on the App Setup-Deploy-Installed Packages screen.

Step 1 - Get It Now

AnyGoal is installed from the Salesforce AppExchange at:

<http://appexchange.salesforce.com/listingDetail?listingId=a0N30000008ZzFNEA0>. Click the green **Get It Now** button to begin the installation. After clicking **Get It Now** you will be asked which environment you want to deploy anyGoal into. We recommend installing in your production Salesforce environment to best evaluate the features with realistic scenarios and make it easy to convert your trial to an active license. Depending on whether you are logged in to your Salesforce organization at the time you click **Get It Now** you may be asked to provide your login credentials. Enter the login credentials for the Salesforce organization you want to install anyGoal into. Click **Continue** after answering these questions.

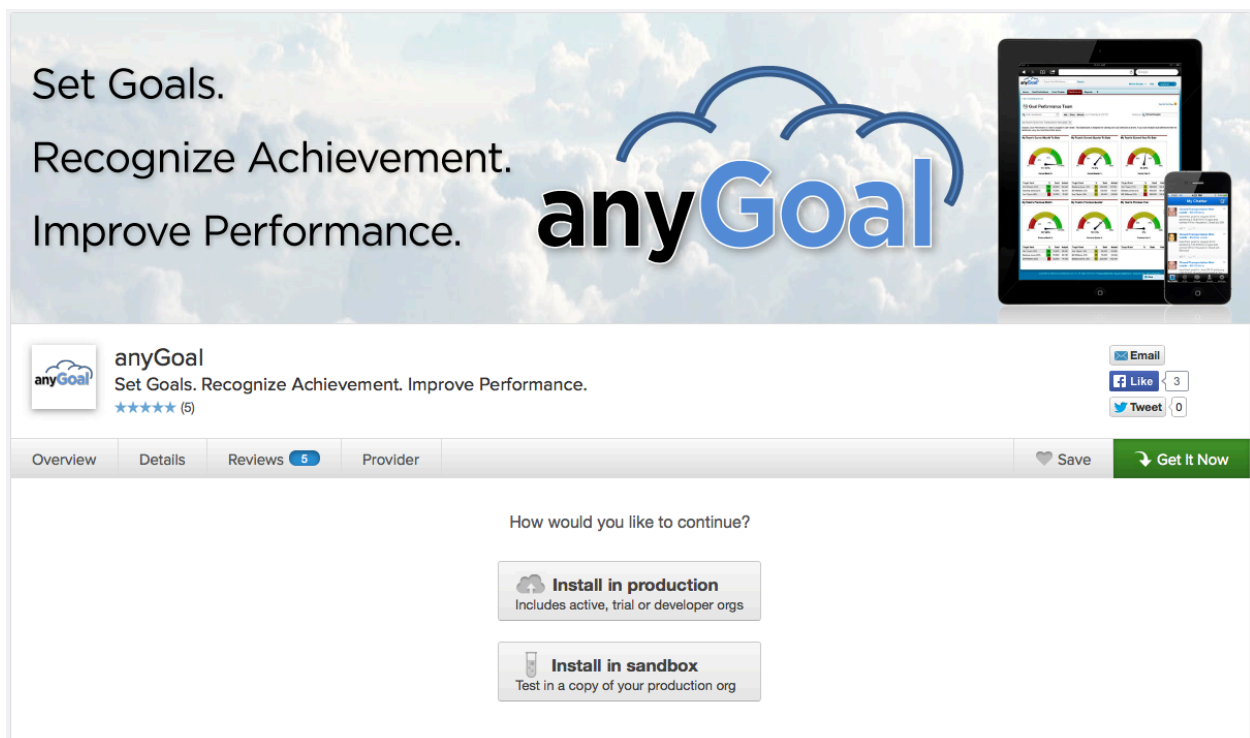


Figure 1 – Get It Now

Click the environment you want to install anyGoal into. After clicking the appropriate button, you may be asked to re-enter your user name and password. Be sure to enter the correct user name and password for the environment you selected.

Step 2 - Confirm Installation

Next, review and agree to the Terms and Conditions to continue.

Set Goals.
Recognize Achievement.
Improve Performance.

anyGoal

anyGoal
Set Goals. Recognize Achievement. Improve Performance.
★★★★★ (5)

Overview Details Reviews 5 Provider Save Get It Now

Almost there!

i Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING
PACKAGE anyGoal	ORGANIZATION inCloud LLC
VERSION anyGoal (Summer 2014 / 1.126.0)	EDITION Developer
SUBSCRIPTION Free Trial	USER NAME michael@92demo.com
DURATION 30 Days	
NUMBER OF SUBSCRIBERS Site-wide	

☒ I have read and agree to the [terms and conditions](#) .

[Cancel Install](#) | [Back to previous step](#) **Confirm and Install!**

Figure 2 – Confirm Installation

Click **Confirm and Install!** to continue. After clicking **Confirm and Install**
1. You may be asked to re-enter your user name and password. Be sure to enter the correct user name and password for the environment you selected.

Step 3 – Install anyGoal

Next, you have three installation options:

- Install for Admins Only – Choose this option if you only want the Administrators to access to anyGoal.
- Install for All Users – Choose this option if you want all users to have full access to anyGoal (including goal configuration).
- Install for Specific Profiles – This is the recommended option because it allows you to specify anyGoal access levels by profile.

If you click **Install for Specific Profiles** you are shown the screen below so specify anyGoal access levels by your organization's profiles. Admins are automatically given full access so you do not need to specify for admins. The following anyGoal access levels are available:

- anyGoal Administrator – Enables all anyGoal functionality including goal definition creation and editing of individual goal targets, data and target criteria setting, and anyGoal system settings.
- anyGoal Edit Targets – Enables the ability to view and edit individual goal targets from the *My Goals* tab. Does not provide the ability to create new goal definitions or edit goal definition criteria. This is typically used when you want to allow a user to view and enter goal targets for themselves or users beneath them in role hierarchy.
- anyGoal Read Only – Enables the ability to view goal information without the ability to configure goal definitions. Typically used for users that are assigned goals or managers who will view their subordinates goal performance, but do not need the ability to configure the goal setup.




☐ Install for Admins Only


☐ Install for All Users


☒ Install for Specific Profiles...

Select Specific Profiles

These security settings determine access to the custom objects and components installed in the package. It doesn't affect permissions for existing objects.



Standard profiles (including the Read-Only profile) don't receive access to any installed custom objects. Because permissions are not editable for standard profiles, you must clone your profile to grant access.

Set access level for all profiles to

anyGoal Read Only

Profile	Access Level
System Administrator	Full Access (Your profile must have full access to the package)
Customer Portal Manager	No Access
Authenticated Website	No Access
High Volume Customer Portal	No Access
Service Cloud	No Access
Partner User	No Access
Standard Platform User	No Access

Once you have selected your install option click **Install** and the installation process begins.

Post installation you can modify anyGoal security settings using similarly named permission sets or manually.

Depending on how long the installation takes, you will either get a message 'This app is taking a long time to install' stating you will receive an email when the install is complete

or you will get a screen stating 'Install Complete'. Typically the install should less than 2 minutes.

Once the installation is complete you can begin configuring Goal Definitions by clicking on anyGoal in the application menu dropdown and then clicking **Goal Definitions**. For additional user documentation and explanation of terms click on the **Help For This Page** link on any page within the anyGoal application.

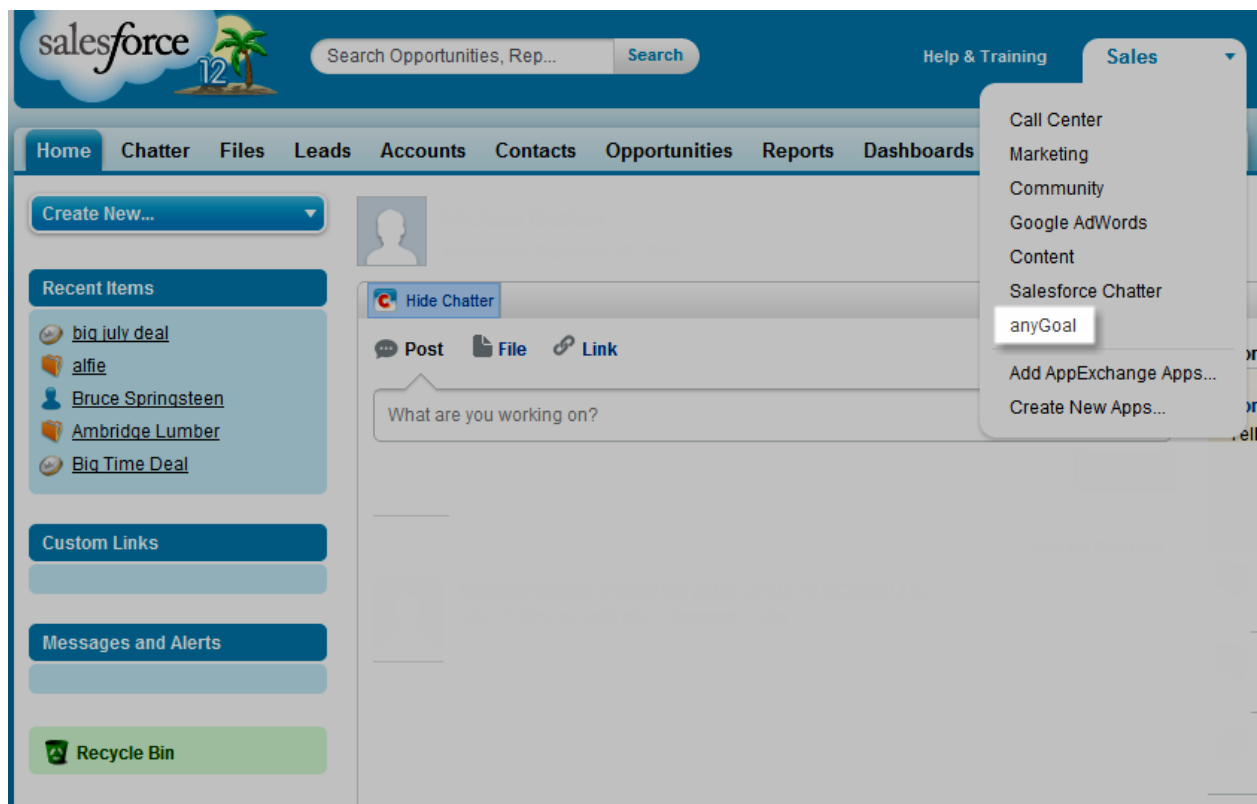


Figure 7 – Accessing anyGoal

The screenshot displays the 'anyGoal' web application interface. The top navigation bar includes 'Goal Definitions', 'Goal Chatter', 'Dashboards', and 'Reports'. The left sidebar features a 'New...' dropdown, 'Items', and a list of goal definitions: 'Widgets Delivered By Factory' and 'Weekly Calls'. The main content area shows a 'Home' header and a 'Recent Goal Definitions' table. A 'Help for this Page' button is visible in the top right corner.

Name	Function	Active	Last Update Started	Last Update Completed	Goal Object	Interval Period	Field To Aggregate	Interval Determined By	Target Object
Widgets Delivered By Factory	Sum	✓	2/20/2013 5:38 PM	2/20/2013 5:38 PM	Widget Line Item	Month	Widget Line Item: Quantity	Widget: Delivery Date	Factory
Weekly Calls	Count	✓	2/20/2013 4:55 PM	2/20/2013 4:55 PM	Task	Week	Task: Activity ID	Task: Due Date Only	User

Figure 8 – Accessing anyGoal User Documentation

For additional assistance email support@incloudonline.com or call 724-934-3847.