REDARGYLE

Your information. Our passion. Clear patterns.

High Five!

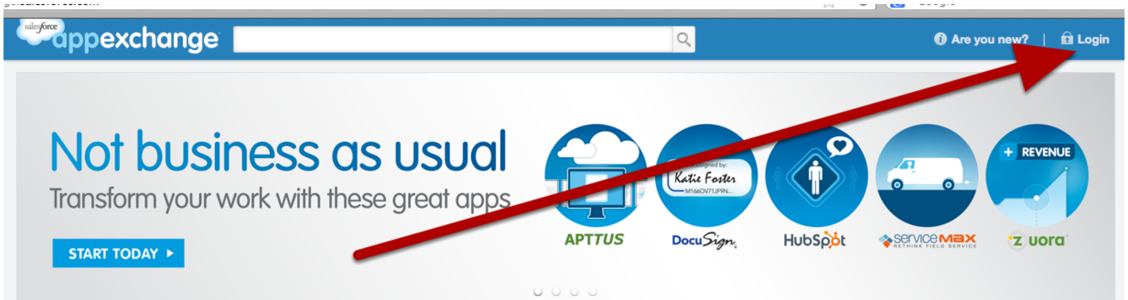
High Five!

Installation

Installing High Five!

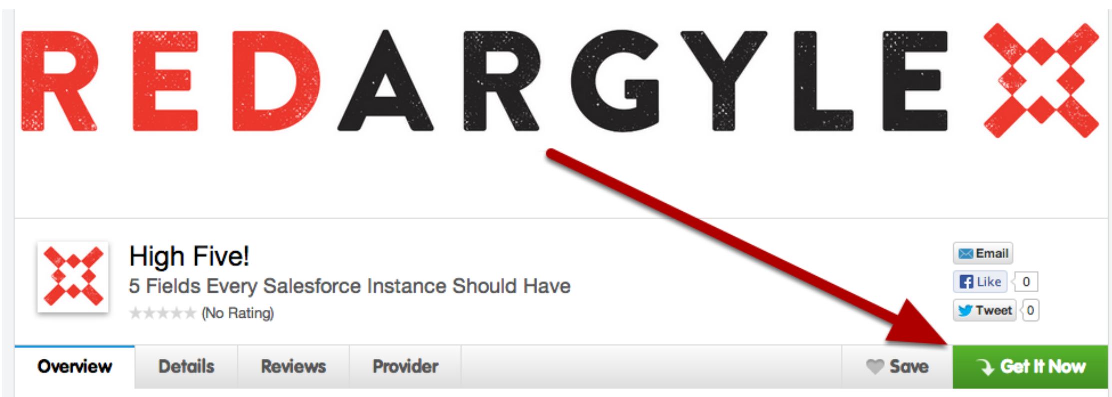
This lesson covers step by step instructions on how to install the High Five! package into your Salesforce instance.

Login to AppExchange



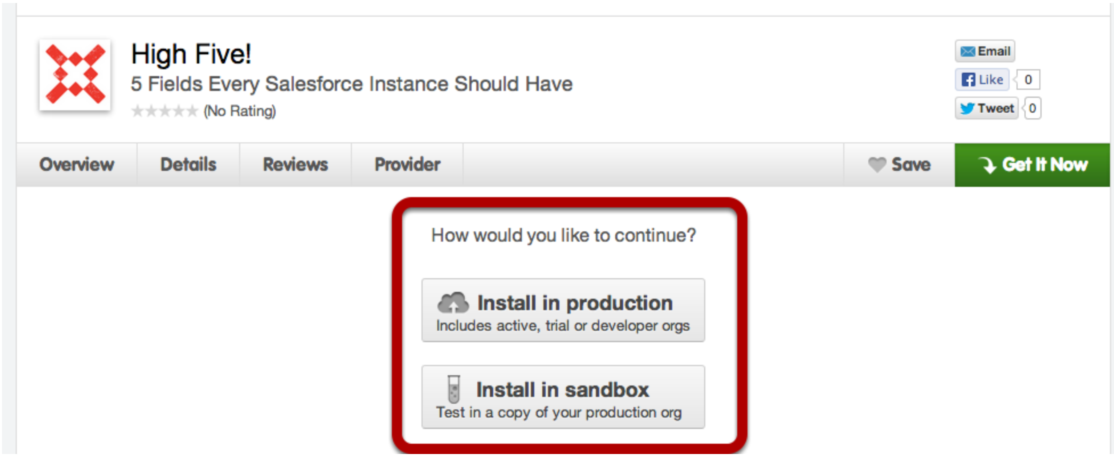
Logging in now will make things easier later on.

From the High Five! AppExchange Page...



Click "Get it now" to essentially... get it now.

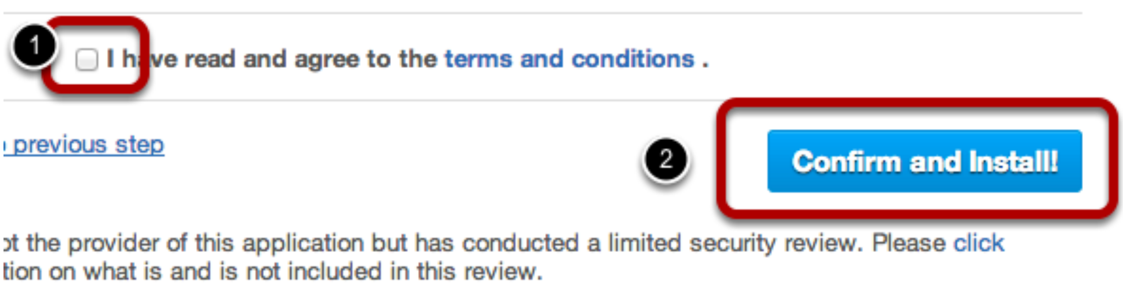
Choose Wisely...



If you wish to install in production or sandbox.

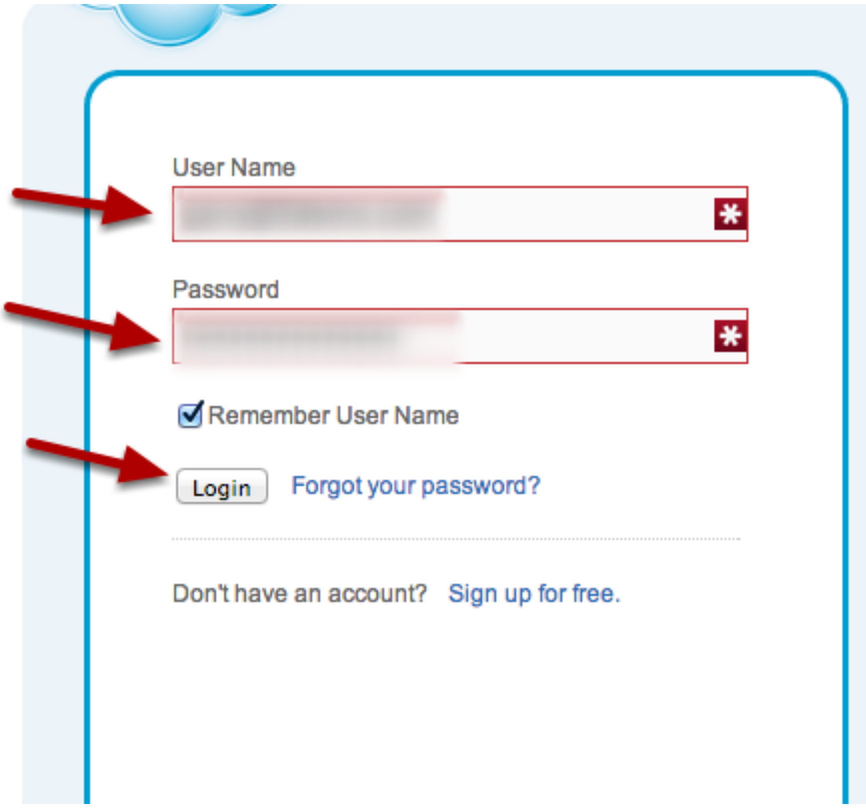
- Install in production if you are SURE you want to intruduce this into your main Salesforce instance and begin implementing the application.
- Install in sandbox if you are simply testing this application and you want to see what it's all about.

Confirm & Install Time!



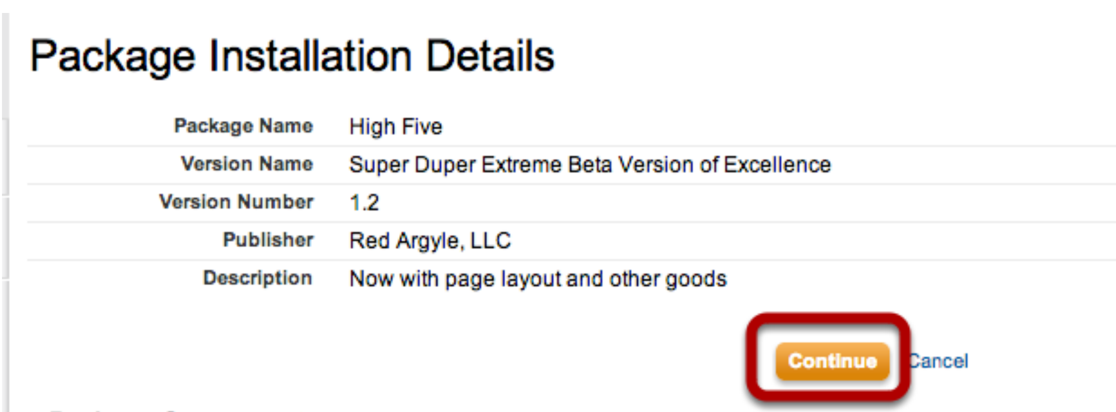
Check that you have read the terms and conditions (After reading them of course!), and click "Confirm and Install"

It might ask you for credentials again...



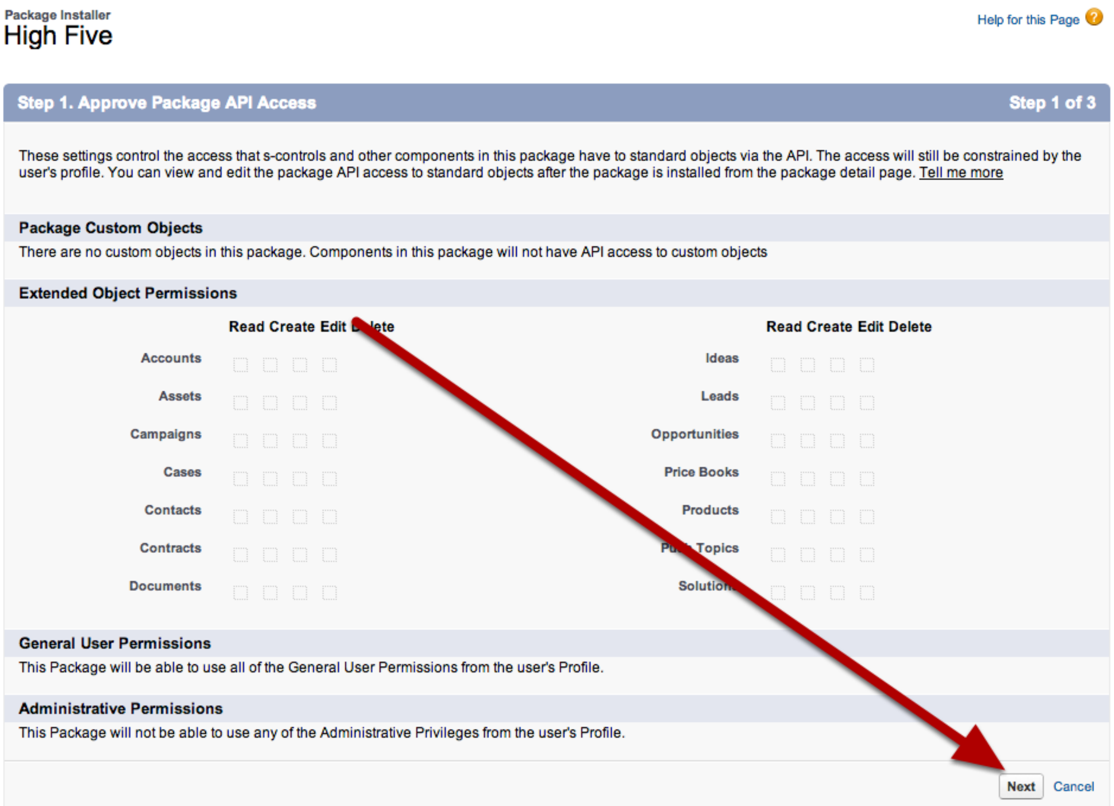
Sometimes, it happens. If so, enter them and login!

Verify Package Details



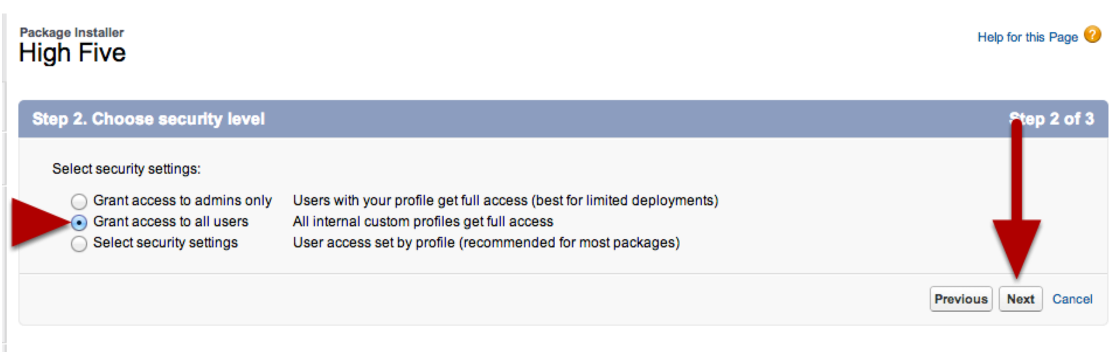
This list will display what is included in the package. As the name states, 5 fields of Awesome, and a few bonus reports to boot. Click the orange "Continue" button if this looks good.

API Access Review



This package does not ask for any API changes, so click next.

Choose Security Settings



This will vary by org, so work with your org administrator or consultant to make the right choice.

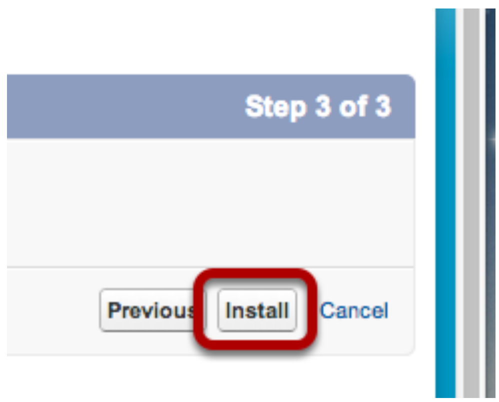
Granting access to admins only will install the package so administrative profiles will have access to the package contents. All users, opens all fields & components up to everyone, or Select Security settings allows you to choose specifically which profiles will have access to the package.

These settings can be modified later on, but it requires a lot less mouse clicks to get them right at the beginning.

For the purposes of this manual, it will be shown to grant access to all users.

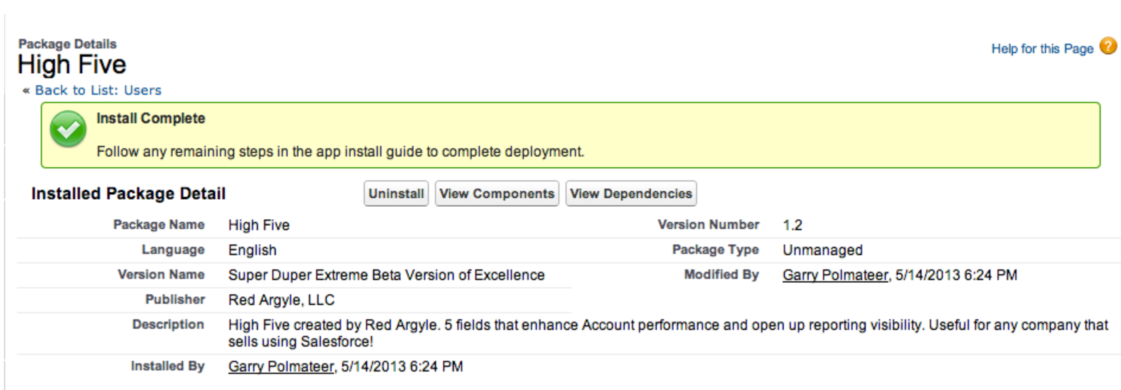
More details on this step located here:
https://help.salesforce.com/htviewhelpdoc?err=1&id=distribution_installing_packages.htm&siteLang

Package Will Now Install..



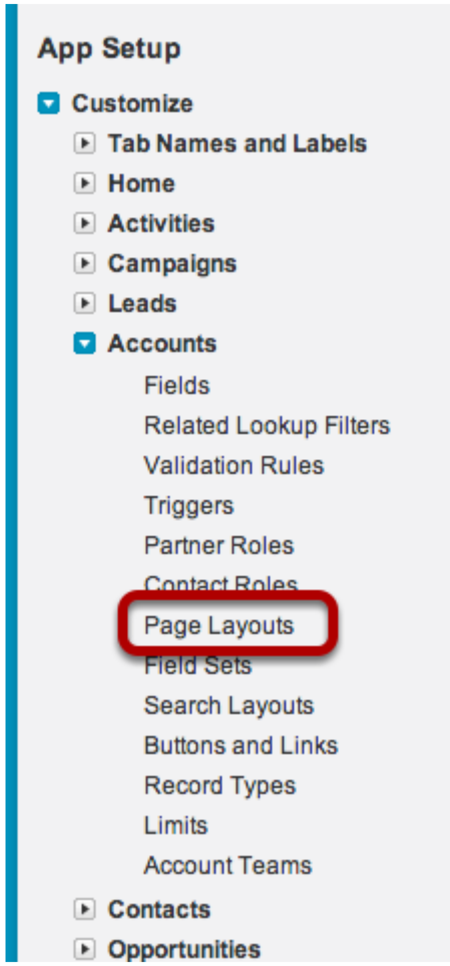
Click Install and LET'S DO THIS!

View Results

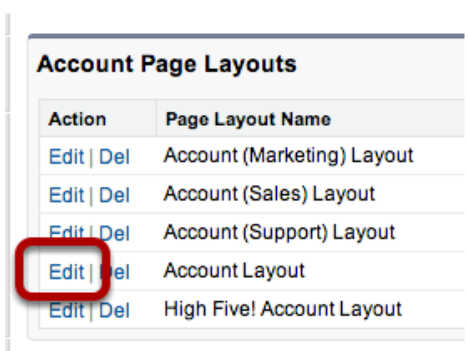


Woo hoo, it worked! Now let's drop those fields on the Account page layout...

Modify Account Page Layout

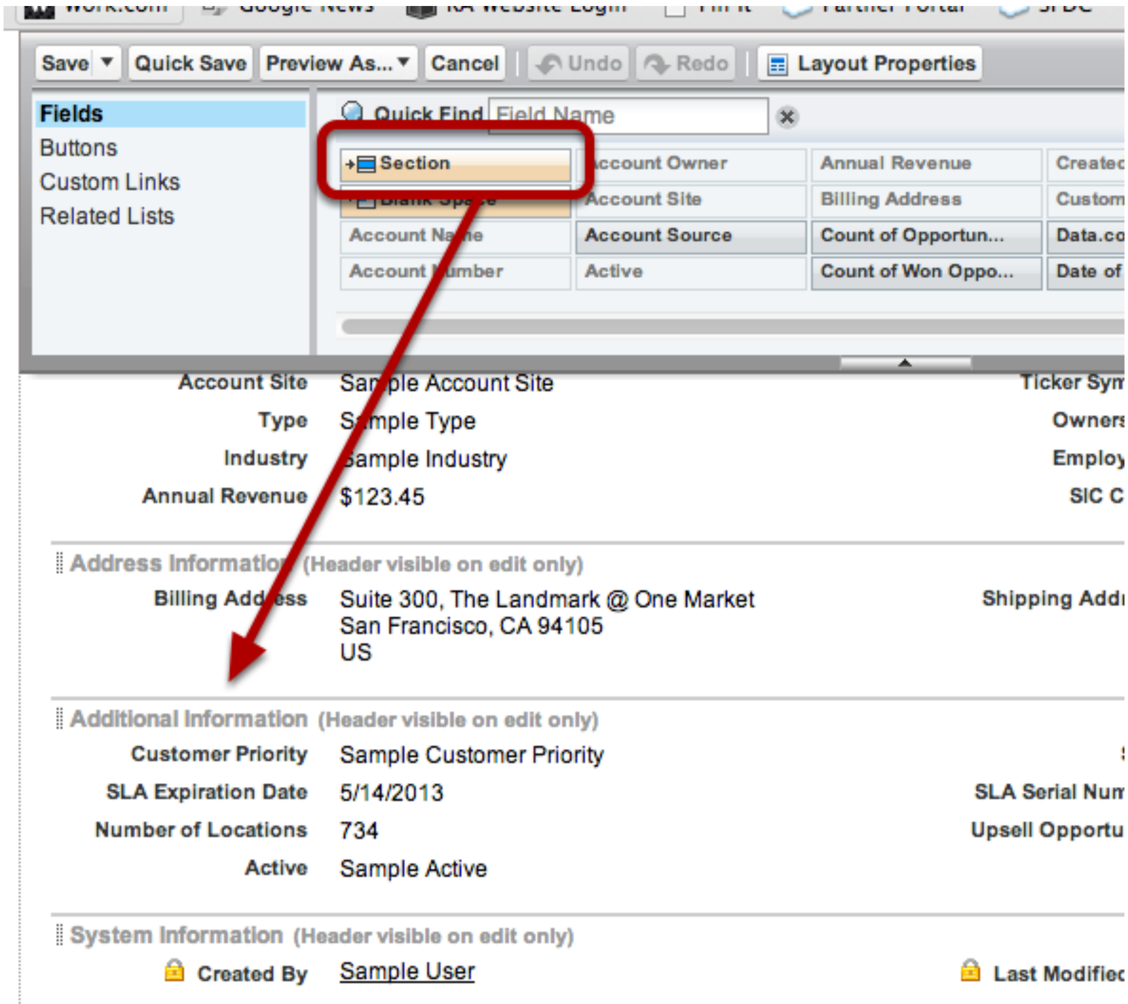


Click Setup > Customize > Accounts > Page Layouts



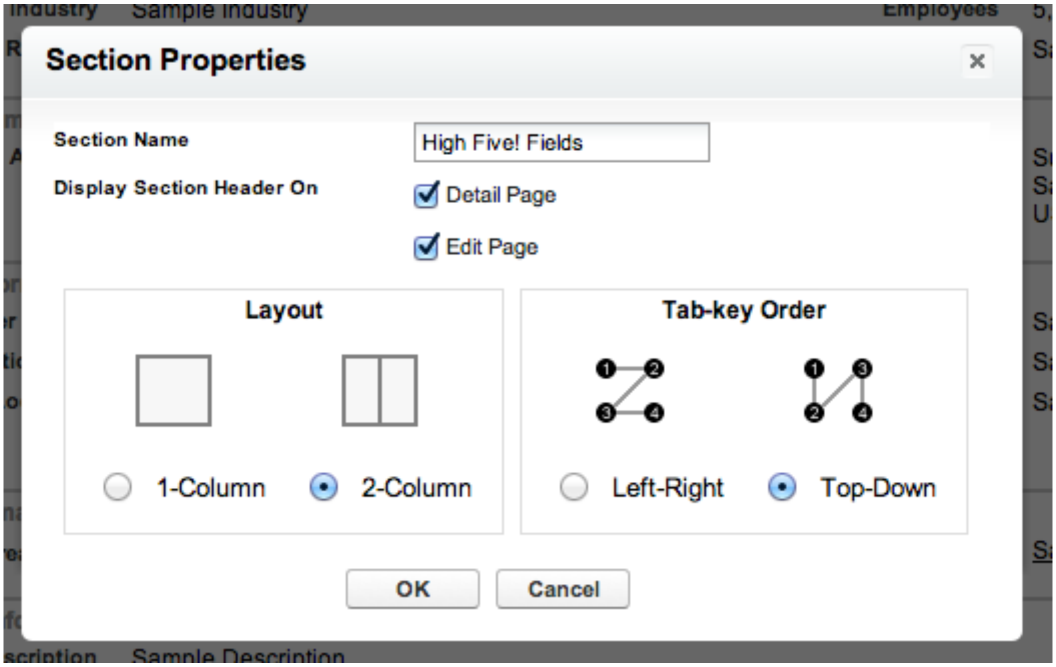
The specific layouts may vary in your org. To add to a page layout, select "Edit" next to the desired page layout you wish to edit.

Add a New Section



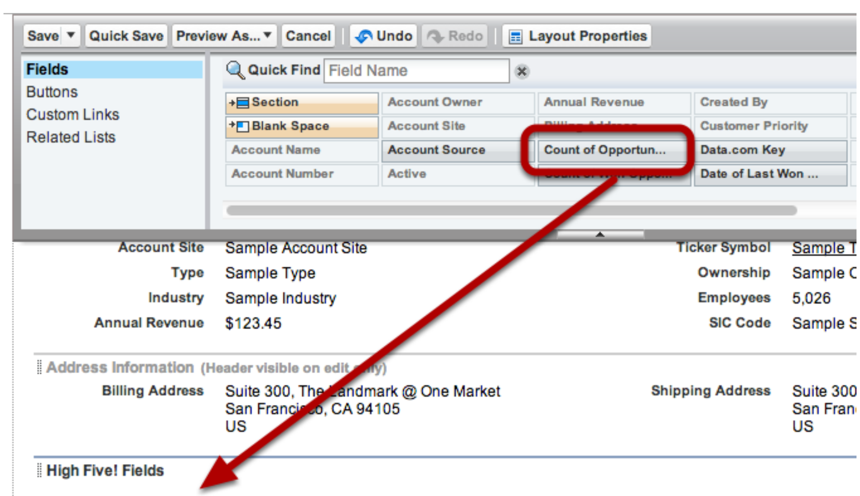
Select "Blank Section" and drag to the page area.

Enter Section Properties



Enter Section Properties (Preferred title, # of Columns, and Tab Key Order). These are my preferred settings.

Add Fields to the Section

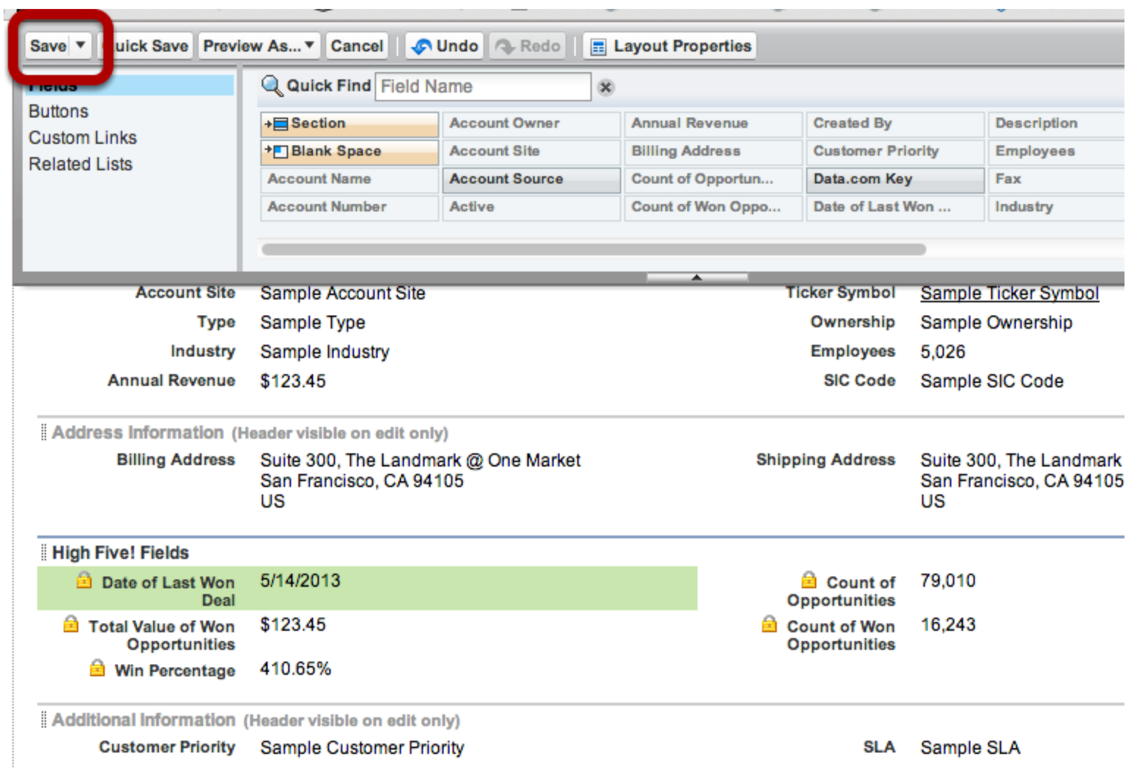


Drag each of the High Five! fields to the newly created section by selecting the field and dragging it to the new section. There are 5 fields -

1. Count of Opportunities
2. Count of Won Opportunities
3. Date of Last Won Sale
4. Total Value of Won Business
5. Win Percentage

Repeat until all 5 fields are in the section.

Almost Done!



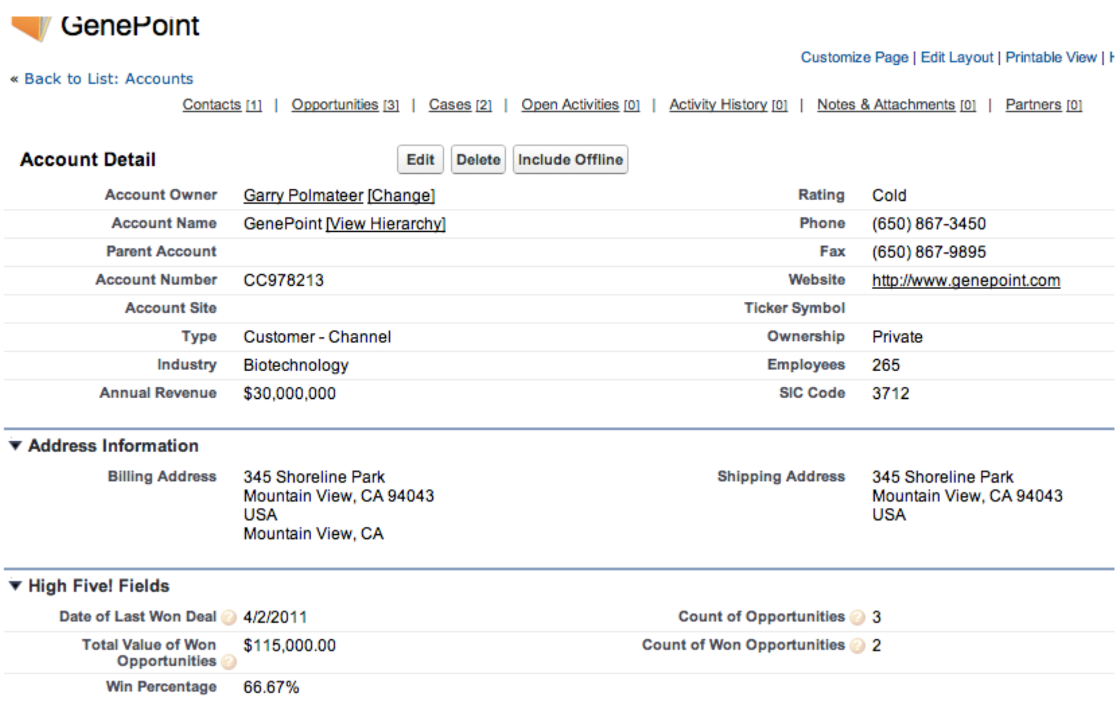
Now just save the page layout and setup is complete!

Usage

Using High Five

This lesson describes how to use High Five

New Fields



High Five has 5 new fields which open up additional visibility related to deals on accounts. The values on these fields are calculated automatically!

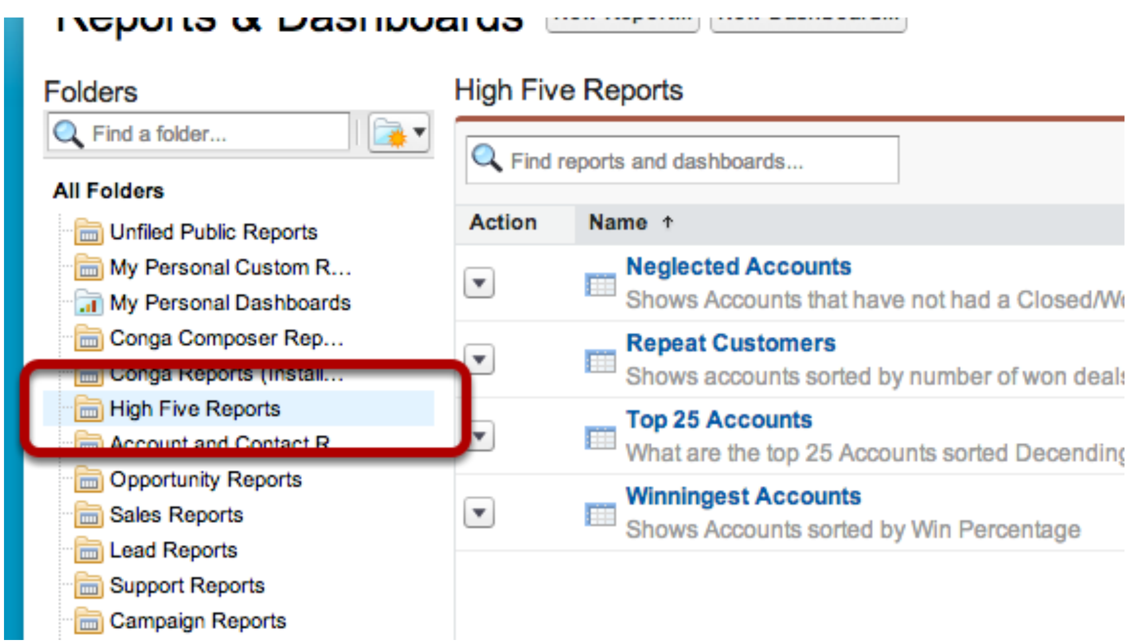
To view the new fields, you must be logged in as a user that has access to the fields, and also on a record which displays the correct page layout that the fields were added to.

This test record, GenePoint has some data that may help. With the 5 new fields, we can quickly gain some insight into the customer.

1. The last won deal was in 2011. It's been awhile. Maybe it's time to push for something new!
2. This account has earned $115,000 for my company. They're not worh ignoring
3. We've won 66% of our deals with GenePoint
4. Total deals was 3. Our average # of deals is 7, we need to get more proposals in front of these guys.
5. Total won deals was 2. If we won 2 out of 3, we REALLY need to get more proposals in front of

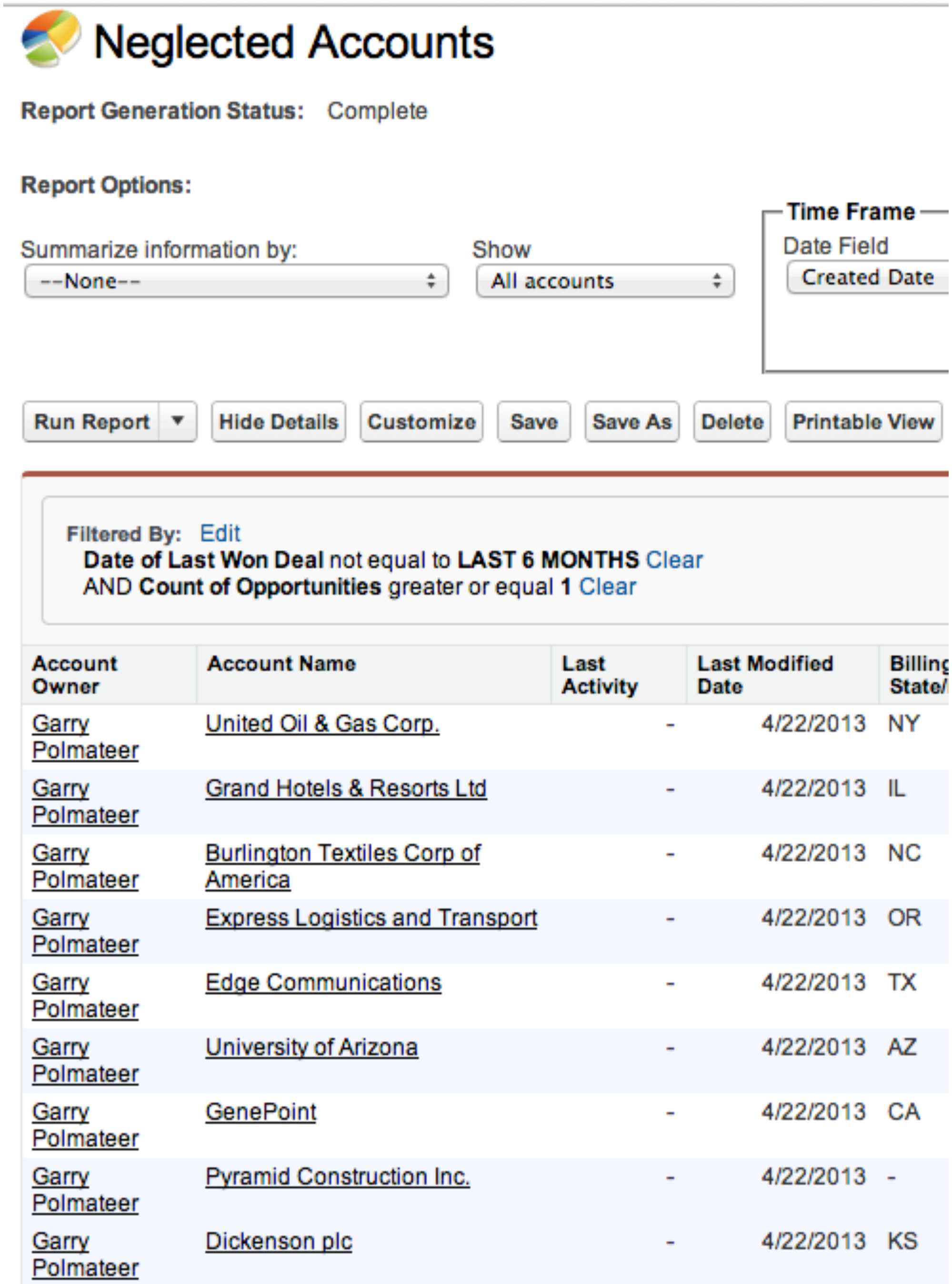
these guys!

New Reports



High Five also includes 4 "Bonus" reports to help use the fields. These reports are just a starting off place. They are located in a folder called "High Five Reports". To view the folder and reports, you must be logged in as a user with access. If you don't have access, contact your system administrator.

Neglected Accounts



Neglected Accounts

Report Generation Status: Complete

Report Options:

Summarize information by: --None--

Show: All accounts

Time Frame
Date Field: Created Date

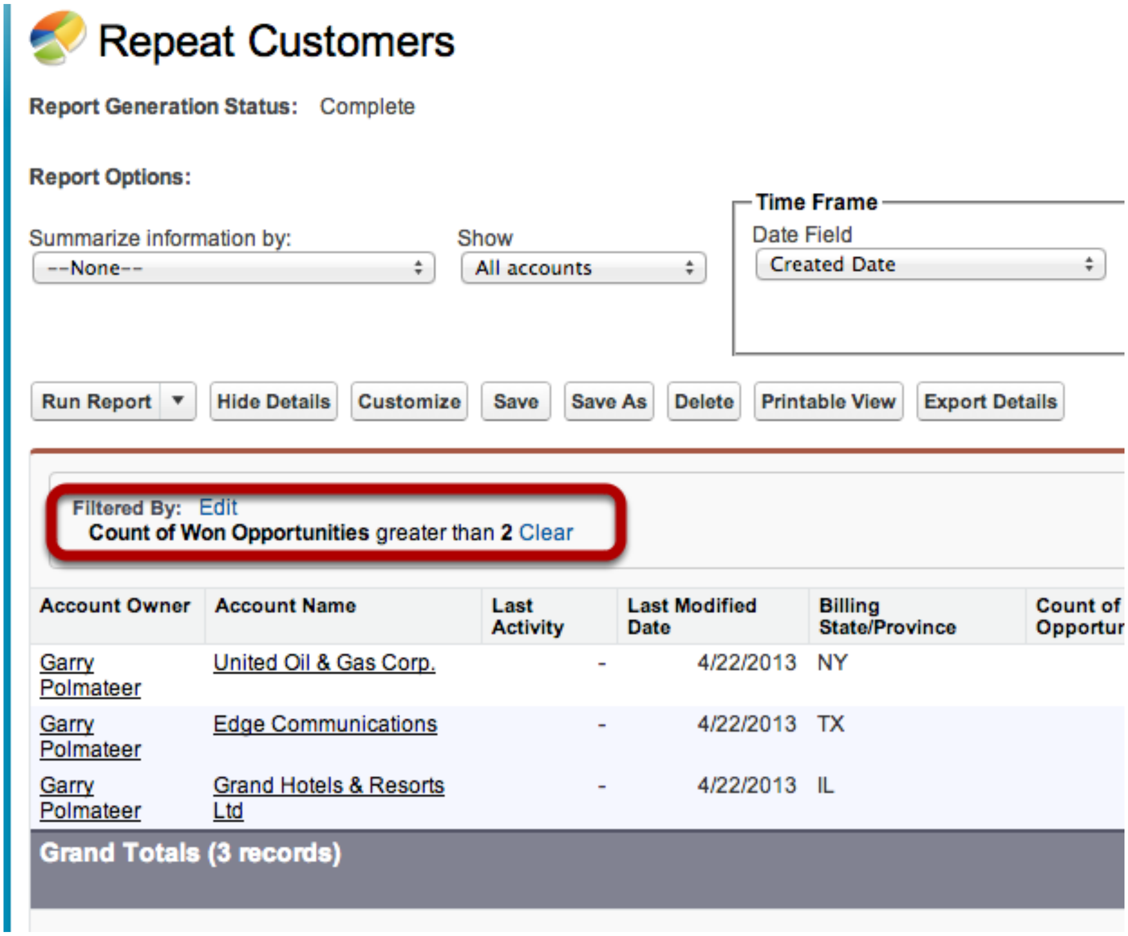
Run Report | Hide Details | Customize | Save | Save As | Delete | Printable View

Filtered By: Edit
Date of Last Won Deal not equal to **LAST 6 MONTHS** Clear
AND **Count of Opportunities** greater or equal **1** Clear

Account Owner	Account Name	Last Activity	Last Modified Date	Billing State/
Garry Polmateer	United Oil & Gas Corp.	-	4/22/2013	NY
Garry Polmateer	Grand Hotels & Resorts Ltd	-	4/22/2013	IL
Garry Polmateer	Burlington Textiles Corp of America	-	4/22/2013	NC
Garry Polmateer	Express Logistics and Transport	-	4/22/2013	OR
Garry Polmateer	Edge Communications	-	4/22/2013	TX
Garry Polmateer	University of Arizona	-	4/22/2013	AZ
Garry Polmateer	GenePoint	-	4/22/2013	CA
Garry Polmateer	Pyramid Construction Inc.	-	4/22/2013	-
Garry Polmateer	Dickenson plc	-	4/22/2013	KS

Shows Accounts that Have Not had a Closed/Won deal in 6 months. It's easy to change the value if your definition of "neglect" is a different time period. Look at all that money on the table!

Repeat Customers



Repeat Customers shows companies that have purchased from your organization multiple times. Simply change the criteria for "Count of Won Opportunities greater than X" to set your definition of what constitutes a repeat customer.

A repeat customer that is also a neglected account is someone your sales people need to get in touch with!

Top X Accounts

Run Report ▼ | Hide Details | Customize | Save | Save As | Delete | Printable View | Export Details

Limited Display:
Limited to **5 rows**, sorted **Descending** by **Total Value of Won Opportunities** Clear

Account Owner	Account Name	Last Activity	Last Modified Date	Billing State/Province
Garry Polmateer	United Oil & Gas Corp.	-	4/22/2013	NY
Garry Polmateer	Grand Hotels & Resorts Ltd	-	4/22/2013	IL
Garry Polmateer	Burlington Textiles Corp of America	-	4/22/2013	NC
Garry Polmateer	Express Logistics and Transport	-	4/22/2013	OR
Garry Polmateer	Edge Communications	-	4/22/2013	TX
Grand Totals (5 records)				

Top 25 Accounts will show the top "X" accounts for your company, sorted on their Total Value of Won Opportunities.

The number of accounts can be changed by modifying the limit criteria. Keeping your top accounts in mind will help your staff prioritize their efforts!

Winningest Accounts

t Won Deal	Total Value of Won Opportunities	Win Percentage ↓
4/2/2011	$235,000.00	100.00%
4/2/2011	$185,000.00	75.00%
4/2/2011	$115,000.00	66.67%
4/2/2011	$140,000.00	66.67%
4/2/2011	$650,000.00	60.00%
4/2/2011	$2,100,000.00	60.00%
4/2/2011	$220,000.00	33.33%
-	$0.00	0.00%
-	$0.00	0.00%
-	$0.00	0.00%
-	$0.00	0.00%
-	$0.00	0.00%

Shows Accounts sorted by Win Percentage. Maybe it's time to give up the ghost on some of those old accounts that you've never won a deal on and go pursue some accounts more likely to bear some fruit!

To Infinity and Beyond!

High Five... What's Next?

A few ideas on what else can be done with High Five

So now what?

High Five brings 5 simple fields into the mix that open up a lot of analytic power of Salesforce. Here's a few more ideas on how to take more advantage of these fields and reports:

- Add the High Five! fields to Account list views to enhance their sorting power
- Add High Five! fields to related list views
- Add High Five! fields to "mini page layouts" so when mousing over an Account name, you get instant analytic power on their key stats.
- Create additional reports using the High Five! fields (such as "Neglected Accounts that are also Repeat Customers"
- Create a Matrix Report showing Number of Won Opportunities vs. Account Value (or other combinations of fields) to determine analytic trends.
- Create a dashboard showing High Five! metrics and visualizations.
- Create Workflow rules (Enterprise Edition Only) that trigger when deals close and Accounts achieve new sales thresholds or win percentages.