



High Five!

High Five!

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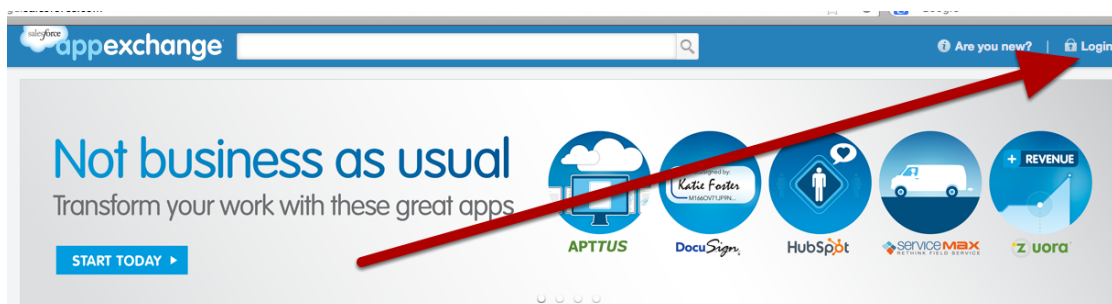
Installation



Installing High Five!

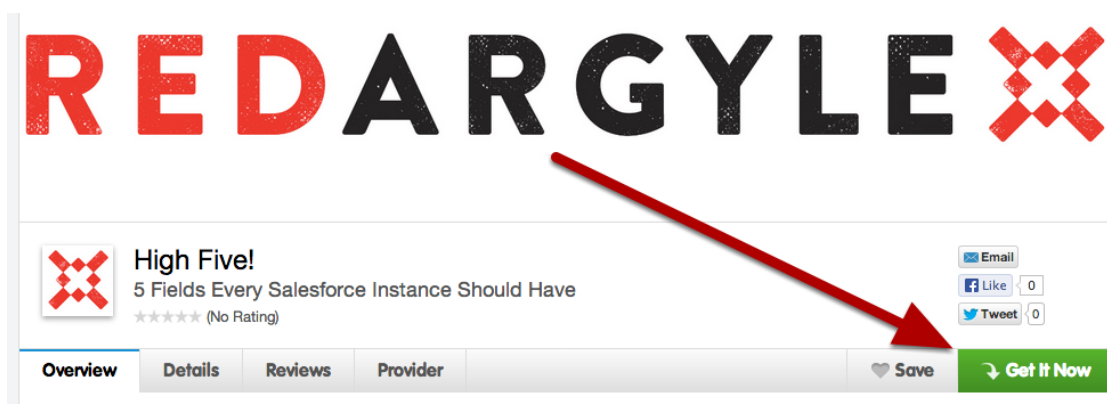
This lesson covers step by step instructions on how to install the High Five! package into your Salesforce instance.

Login to AppExchange



Logging in now will make things easier later on.

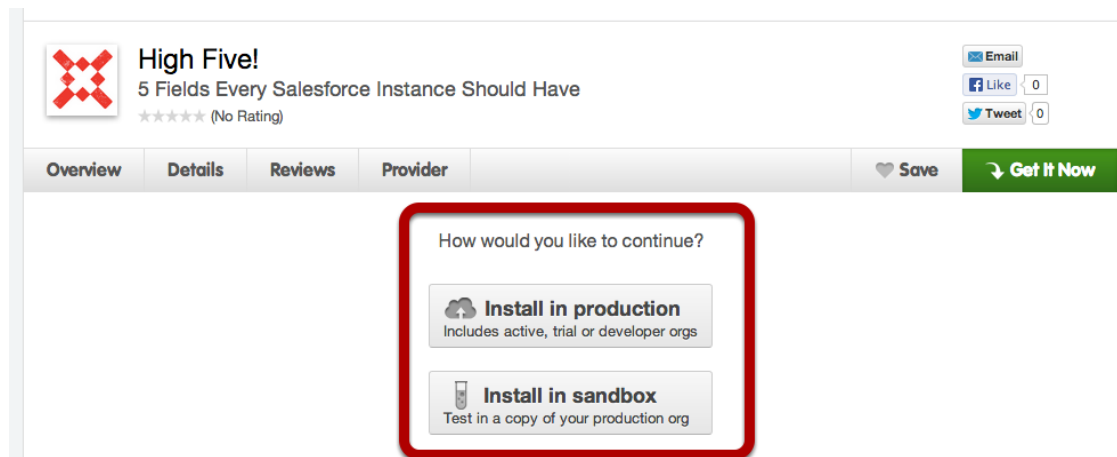
From the High Five! AppExchange Page...



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



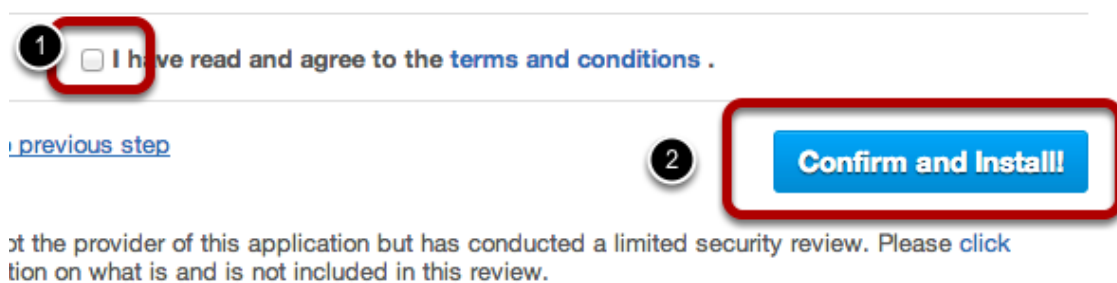
Choose Wisely...



If you wish to install in production or sandbox.

- Install in production if you are SURE you want to introduce 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...

User Name

Password

☒ Remember User Name

Login [Forgot your password?](#)

Don't have an account? [Sign up for free.](#)

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

Verify Package Details

Package Installation Details

Package Name	High Five
Version Name	Super Duper Extreme Beta Version of Excellence
Version Number	1.2
Publisher	Red Argyle, LLC
Description	Now with page layout and other goods

[Continue](#) [Cancel](#)

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

Package Installer
High Five

[Help for this Page](#)

Step 1. Approve Package API Access **Step 1 of 3**

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects
There are no custom objects in this package. Components in this package will not have API access to custom objects

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	☐	☐	☐	☐	Ideas	☐	☐	☐	☐
Assets	☐	☐	☐	☐	Leads	☐	☐	☐	☐
Campaigns	☐	☐	☐	☐	Opportunities	☐	☐	☐	☐
Cases	☐	☐	☐	☐	Price Books	☐	☐	☐	☐
Contacts	☐	☐	☐	☐	Products	☐	☐	☐	☐
Contracts	☐	☐	☐	☐	Public Topics	☐	☐	☐	☐
Documents	☐	☐	☐	☐	Solutions	☐	☐	☐	☐

General User Permissions
This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions
This Package will not be able to use any of the Administrative Privileges from the user's Profile.

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

Choose Security Settings

Package Installer
High Five

[Help for this Page](#)

Step 2. Choose security level **Step 2 of 3**

Select security settings:

☐ Grant access to admins only
Users with your profile get full access (best for limited deployments)

☒ Grant access to all users
All internal custom profiles get full access

☐ Select security settings
User access set by profile (recommended for most packages)

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.

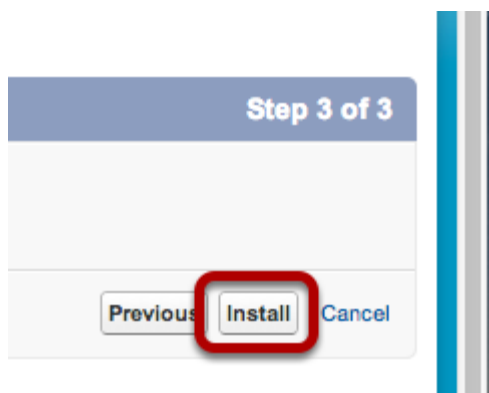
These settings can be modified later on, but it requires a lot less mouse clicks to get them right at the beginning.

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

Package Details
High Five
◀ Back to List: Users Help for this Page ?

 **Install Complete**
Follow any remaining steps in the app install guide to complete deployment.

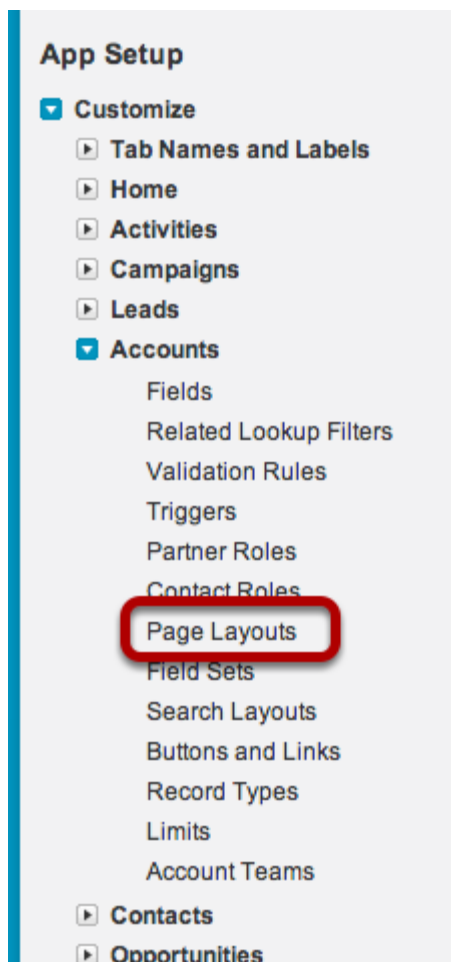
Installed Package Detail Uninstall View Components View Dependencies

Package Name	High Five	Version Number	1.2
Language	English	Package Type	Unmanaged
Version Name	Super Duper Extreme Beta Version of Excellence	Modified By	Garry Polmateer, 5/14/2013 6:24 PM
Publisher	Red Argyle, LLC		
Description	High Five created by Red Argyle. 5 fields that enhance Account performance and open up reporting visibility. Useful for any company that sells using Salesforce!		
Installed By	Garry Polmateer, 5/14/2013 6:24 PM		

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

Account Page Layouts	
Action	Page Layout Name
Edit Del	Account (Marketing) Layout
Edit Del	Account (Sales) Layout
Edit Del	Account (Support) Layout
Edit Del	Account Layout
Edit Del	High Five! Account Layout

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

The screenshot shows a software interface with a 'Fields' panel on the left. The 'Blank Section' option is highlighted with a red box. A red arrow points from this option to the 'Address Information' section in the main content area. The main content area displays various fields and sections, including 'Account Site', 'Type', 'Industry', 'Annual Revenue', 'Billing Address', 'Shipping Address', 'Customer Priority', 'SLA Expiration Date', 'Number of Locations', 'Active', 'System Information', 'Created By', and 'Last Modified'.

Account Site	Sample Account Site	Ticker Sym
Type	Sample Type	Owners
Industry	Sample Industry	Employ
Annual Revenue	\$123.45	SIC C

Address Information (Header visible on edit only)

Billing Address	Shipping Addi
Suite 300, The Landmark @ One Market San Francisco, CA 94105 US	

Additional Information (Header visible on edit only)

Customer Priority	Sample Customer Priority	
SLA Expiration Date	5/14/2013	SLA Serial Num
Number of Locations	734	Upsell Opportu
Active	Sample Active	

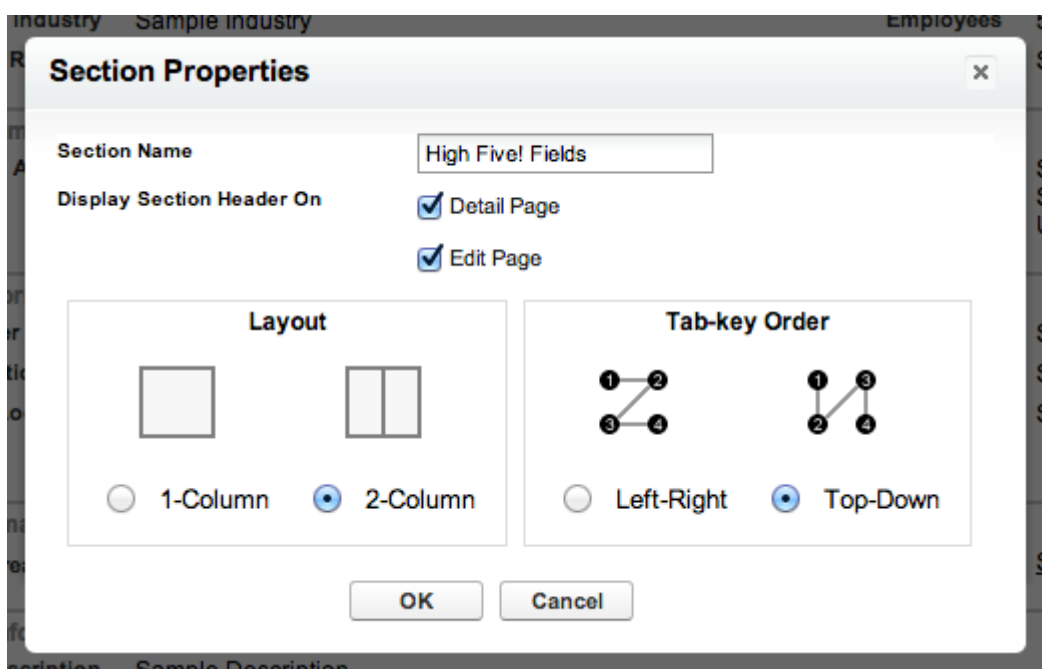
System Information (Header visible on edit only)

Created By	Sample User	Last Modified

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



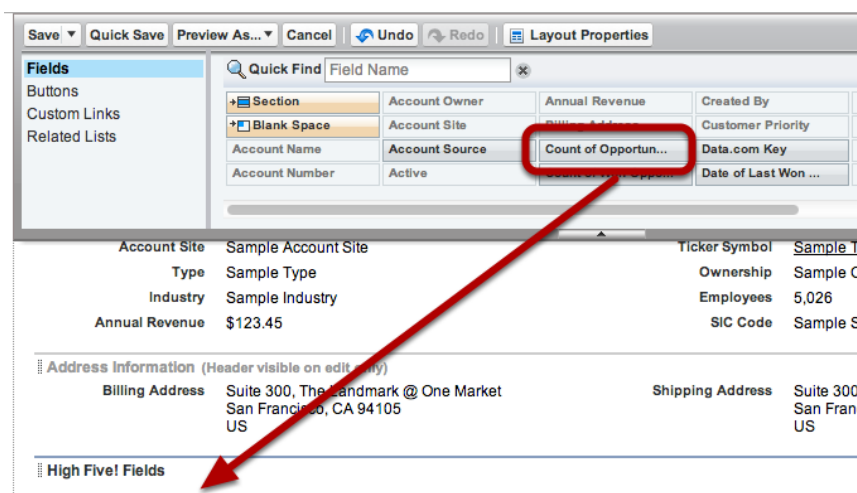
Enter Section Properties



The 'Section Properties' dialog box is shown. It has a title bar with a close button. The 'Section Name' field contains 'High Five! Fields'. Under 'Display Section Header On', both 'Detail Page' and 'Edit Page' are checked. The 'Layout' section shows a 2-column grid icon selected, with '1-Column' and '2-Column' radio buttons, where '2-Column' is selected. The 'Tab-key Order' section shows a top-down sequence icon selected, with 'Left-Right' and 'Top-Down' radio buttons, where 'Top-Down' is selected. 'OK' and 'Cancel' buttons are at the bottom.

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

Add Fields to the Section



The screenshot shows the application interface. At the top is a menu bar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below is a 'Fields' panel on the left with a tree view containing 'Section', 'Blank Space', 'Account Name', 'Account Number', 'Account Site', 'Account Source', 'Active', 'Annual Revenue', 'Created By', 'Customer Priority', 'Data.com Key', and 'Date of Last Won ...'. A red box highlights 'Count of Opportun...' in the 'Fields' list. A red arrow points from this box to a newly created section titled 'High Five! Fields' at the bottom of the page. The main content area displays account information for 'Sample Account Site'.

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!

The screenshot shows a software interface with a 'Save' button highlighted by a red box. The interface includes a 'Quick Find' search bar, a table of fields, and a 'High Five! Fields' section.

Field Name	Field Name	Field Name	Field Name	Field Name
Section	Account Owner	Annual Revenue	Created By	Description
Blank Space	Account Site	Billing Address	Customer Priority	Employees
Account Name	Account Source	Count of Opportun...	Data.com Key	Fax
Account Number	Active	Count of Won Oppo...	Date of Last Won ...	Industry

Account Site: Sample Account Site
Type: Sample Type
Industry: Sample Industry
Annual Revenue: \$123.45
Ticker Symbol: Sample Ticker Symbol
Ownership: Sample Ownership
Employees: 5,026
SIC Code: Sample SIC Code

Address Information (Header visible on edit only)

Billing Address	Shipping Address
Suite 300, The Landmark @ One Market San Francisco, CA 94105 US	Suite 300, The Landmark San Francisco, CA 94105 US

High Five! Fields

Field Name	Field Value	Field Name	Field Value
Date of Last Won Deal	5/14/2013	Count of Opportunities	79,010
Total Value of Won Opportunities	\$123.45	Count of Won Opportunities	16,243
Win Percentage	410.65%		

Additional Information (Header visible on edit only)

Customer Priority	SLA
Sample Customer Priority	Sample SLA

Now just save the page layout and setup is complete!



Usage



Using High Five

This lesson describes how to use High Five

New Fields

 **GenePoint**

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help](#)

[Back to List: Accounts](#)

[Contacts \[1\]](#) | [Opportunities \[3\]](#) | [Cases \[2\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#) | [Partners \[0\]](#)

Account Detail [Edit](#) [Delete](#) [Include Offline](#)

Account Owner	Garry Polmateer [Change]	Rating	Cold
Account Name	GenePoint [View Hierarchy]	Phone	(650) 867-3450
Parent Account		Fax	(650) 867-9895
Account Number	CC978213	Website	http://www.genepoint.com
Account Site		Ticker Symbol	
Type	Customer - Channel	Ownership	Private
Industry	Biotechnology	Employees	265
Annual Revenue	\$30,000,000	SIC Code	3712

▼ Address Information

Billing Address	345 Shoreline Park Mountain View, CA 94043 USA Mountain View, CA	Shipping Address	345 Shoreline Park Mountain View, CA 94043 USA
-----------------	---	------------------	--

▼ High Five Fields

Date of Last Won Deal 🕒	4/2/2011	Count of Opportunities 🕒	3
Total Value of Won Opportunities 🕒	\$115,000.00	Count of Won Opportunities 🕒	2
Win Percentage 🕒	66.67%		

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 worth 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

Reports & Dashboards

Folders

Find a folder...

All Folders

- Unfiled Public Reports
- My Personal Custom R...
- My Personal Dashboards
- Conga Composer Rep...
- Conga Reports (Install...
- High Five Reports**
- Account and Contact R...
- Opportunity Reports
- Sales Reports
- Lead Reports
- Support Reports
- Campaign Reports

High Five Reports

Find reports and dashboards...

Action	Name ↑
▼	Neglected Accounts Shows Accounts that have not had a Closed/Wi
▼	Repeat Customers Shows accounts sorted by number of won deal
▼	Top 25 Accounts What are the top 25 Accounts sorted Decending
▼	Winningest Accounts Shows Accounts sorted by Win Percentage

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:

Show

Time Frame

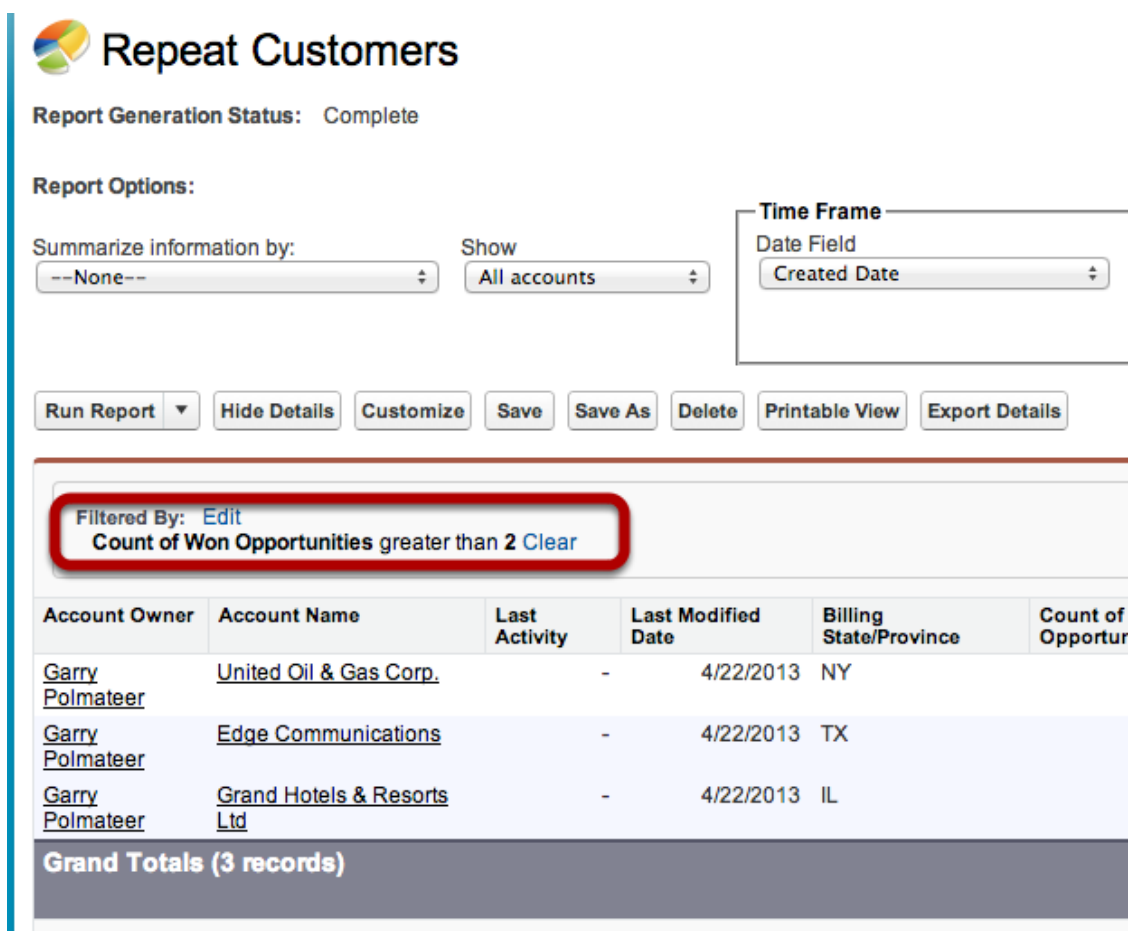
Filtered By: [Edit](#)
Date of Last Won Deal not equal to **LAST 6 MONTHS** [Clear](#)
AND Count of Opportunities greater or equal **1** [Clear](#)

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

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame

Filtered By: [Edit](#)
Count of Won Opportunities greater than 2 [Clear](#)

Account Owner	Account Name	Last Activity	Last Modified Date	Billing State/Province	Count of Opportur
Garry Polmateer	United Oil & Gas Corp.	-	4/22/2013	NY	
Garry Polmateer	Edge Communications	-	4/22/2013	TX	
Garry Polmateer	Grand Hotels & Resorts Ltd	-	4/22/2013	IL	
Grand Totals (3 records)					

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

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.