

Abstract

WikiAccount package contains a custom Visualforce component that displays the history sales analytics on the account layout.
The component is added into the Standard Account Details Page as an in-line section.

Description

A good salesman needs to know his customers, in order to win deals.

With WikiAccount you are one step ahead to succeed.

WikiAccount provides the analysis your sales team needs for strategizing their future sales. It will help the team to optimize their effort and shorten the sales cycle.

Embedded into the account page, you will find the analysis, based on the current and past opportunities related to this customer.

Key Charts

Should I start a deal now?

See the starting point of already won opportunities. It will help you to decide, when it is the best moment, to start a deal with this customer.

When should I push to close?

See the closing point of already won opportunities. It will help you to decide, when to push the customer to close the deal.

Is there a pattern?

Analyzing the sales activities with a certain customer, over a period of 4 years, will help you to forecast the future deal.

Key Fields

Avg Won Cycle

Average time (in days) since the opportunity was created until it was closed. ***Should it really take so long?***

Avg Lost Cycle

Average time (in days) since the opportunity was created until it was closed. ***How can time be shortened in order to focus on winning deals?***

Avg Sales Amount

Look at this value to ***better assess your future quote.*** Analysis is based on won opportunities.

Win Ratio

See the ***chances of winning a future deal.*** Number of won opportunities/ number of closed opportunities

Actual Revenue

See how much the customer already bought. This can help you ***to choose your approach in the next deal.*** It is the sum of all won opportunities

Expected Revenue

Are you aware of ***the potential of this customer?*** Sum of expected revenue in all open opportunities.

WikiAccount – Data Sheet

Feature	
Change chart title/ field name	Support custom label
Translate chart title/ field name	Support custom label

Requirements	
External Service	None
Salesforce.com Edition	Enterprise, Unlimited, Developer

Specification	
Publisher	WikiApps4U
Type	Native
Salesforce.com Certification	None
Pricing	Free

Privacy

By default, WikiAccount component is using the sharing setting that runs on your organization. Meaning, the analytics is based on records which the running user has permission to view.

There is an option to remove the security setting from the component, so any user will be able to see the analytics based on all the opportunities related to a specific account. Find the explanation on how to remove the sharing settings for the component on the “WikiAccountCustomizationGuide”.

WikiAccount Component

