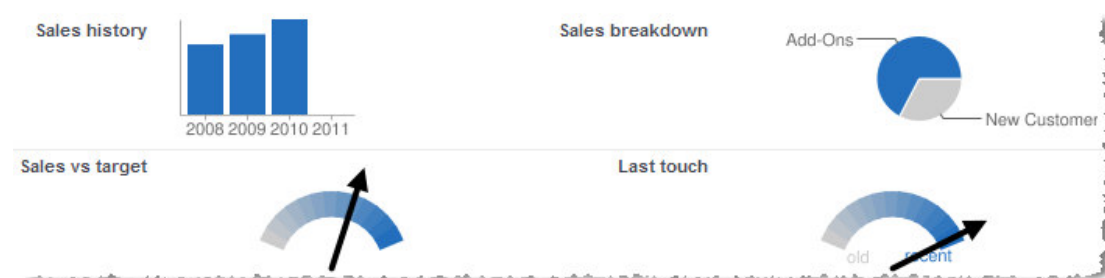


Analyze your accounts with Google Charts – Setup Guide

Installation

You just need to follow the steps and automatically, this will create:

- 4 formulas displaying google charts



- 8 fields used by these formulas

Sales target this year	\$150,000	Days since last update or activity	3
Sold 2008	\$70,000.00	Sold 2009	\$80,000.00
Sold 2010	\$95,000.00	Sold 2011	\$0.00
Sold - Add-ons	\$165,000.00	Sold - New Customer	\$80,000.00

You will just need to edit the account page layout :



And to add the relevant fields to the page layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields
Buttons
Custom Links
Related Lists

Quick Find Field Name

ed By	Parent Account	Sales history	SIC Code	Sold 2008
	Phone	Sales target this...	SLA	Sold 2009
Locations	Rating	Sales vs target	SLA Expiration Date	Sold 2010
	Sales breakdown	Shipping Address	SLA Serial Number	Sold 2011

Account Detail

Standard Buttons: Edit Delete Sharing Include Offline Enable As Partner
Custom Buttons: Disable Customer Portal Account Disable Partner Account

Account Information (Header visible on edit only)

Account Owner	Sample User	Rating	Sample Rating
* Account Name	Sample Account Name	Phone	1-415-555-1212
Parent Account	Sample Account	Fax	1-415-555-1212
Account Number	Sample Account Number	Website	www.salesforce.com
Account Site	Sample Account Site	Ticker Symbol	Sample Ticker Symbol
Type	Sample Type	Ownership	Sample Ownership
Industry	Sample Industry	Employees	59,380
Annual Revenue	\$123.45	SIC Code	Sample SIC Code

Google charts

Sales history	Sample Sales history	Sales breakdown	Sample Sales breakdown
Sales vs target	Sample Sales vs target	Last touch	Sample Last touch
Sales target this year	\$123.45	Days since last update or activity	17,033 Last touch

Sales history



This google chart is showing the evolution of your sales between 2008 and 2011. It is using the 4 new custom fields Sold 2008, Sold 2009, Sold 2010 and Sold 2011.

These fields are rollup summary fields doing the sum of won opportunities for a specific year

Field Information

Field Label: Sold 2008

Field Name: GC_Sold_2008

Description:

Help Text:

Roll-Up Summary Options

Data Type: Roll-Up Summary

Calculation Options:

☒ Automatic calculation (Recommended)

☐ Force a mass recalculation of this field

Select Object to Summarize

Master Object: Account

Summarized Object: Opportunities

Select Roll-Up Type

☐ COUNT

☒ SUM

☐ MIN

☐ MAX

Field to Aggregate: Amount

Filter Criteria

☐ All records should be included in the calculation

☒ Only records meeting certain criteria should be included in the calculation

Field	Operator	Value	
Close Date	greater or equal	1/1/2008	AND
Close Date	less or equal	12/31/2008	AND
Web			AND

The formula used to display the chart is using the following syntax:

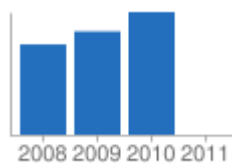
```
if(max(GC_Sold_2008__c,GC_Sold_2009__c, GC_Sold_2010__c,GC_Sold_2011__c)>0,  
/* We want to display the chart only if something has been sold between 2008 and 2011 */
```

```
image("http://chart.apis.google.com/chart?cht=bvs  
/* google chart : type bar chart */
```

```
&chf=bg,s,ffffff  
/* white background */
```

```
&chco=236FBD  
/* Color of the chart */
```

```
&chd=t:"  
&text( GC_Sold_2008__c/max(GC_Sold_2008__c,GC_Sold_2009__c,  
GC_Sold_2010__c,GC_Sold_2011__c)*100 )&," "  
&text( GC_Sold_2009__c/max(GC_Sold_2008__c,GC_Sold_2009__c,  
GC_Sold_2010__c,GC_Sold_2011__c)*100 )&," "  
&text( GC_Sold_2010__c/max(GC_Sold_2008__c,GC_Sold_2009__c,  
GC_Sold_2010__c,GC_Sold_2011__c)*100 )&," "  
&text( GC_Sold_2011__c/max(GC_Sold_2008__c,GC_Sold_2009__c,  
GC_Sold_2010__c,GC_Sold_2011__c)*100 )&"  
/* These are the value of the chart for each year. In order to get a better display, we show these values  
as a percentage of the maximum value of all years.  
Example if the sales per year are as follow : 2008: 70K, 2009: 80K, 2010: 95K, 2011: 0K, we obtain  
2008: 70/95, 2009: 80/95, 2010: 95/95=1, 2011: 0 */
```



```
&chs=200x80  
/* Chart size in pixels */
```

```
&chl=2008|2009|2010|2011","history"),  
/* Chart legend */
```

```
image("http://chart.apis.google.com/chart?cht=bvs&chf=bg,s,ffffff&chco=236FBD&chd=t:0,0,0,0&chs=20  
0x80&chl=2008|2009|2010|2011","history"))  
/* If there are no sales between 2008 and 2011, we display an empty chart */
```

Sales breakdown



This google chart is showing the breakdown of your sales by opportunity type. It is using 2 new custom fields “Sold Add-Ons” and “Sold New Customer”:

- o “Sold New customer” is doing the sum of won opportunities with type equal “New Customer”
- o “Sold Add-ons” is doing the sum of won opportunities with type not equal to “New Customer”

Field Information		
Field Label	Sold - Add-ons	
Field Name	GC_Sold_Add_ons	
Roll-Up Summary Options		
Data Type	Roll-Up Summary	
Calculation Options	☒ Automatic calculation (Recommended)	
	☐ Force a mass recalculation of this field	
Select Object to Summarize		
Master Object	Account	
Summarized Object	Opportunities	
Select Roll-Up Type		
☐ COUNT		
☒ SUM	Field to Aggregate Amount	
☐ MIN		
☐ MAX		
Filter Criteria		
☐ All records should be included in the calculation		
☒ Only records meeting certain criteria should be included in the calculation		
Field	Operator	Value
Type	not equal to	New Customer
Won	equals	true

Feel free to customize these fields to use your own opportunity types

The formula used to display the chart is using the following syntax:

```
IF(GC_Sold_New_Customer__c+GC_Sold_Add_ons__c>0,  
/* If there are sales in one of the type */
```

```
Image("http://chart.apis.google.com/chart?cht=p  
/*Google chart with type "pie" */
```

```
&chd=t:&TEXT( GC_Sold_New_Customer__c*100/  
(GC_Sold_New_Customer__c+GC_Sold_Add_ons__c) )&,"&TEXT( GC_Sold_Add_ons__c*100/(GC_  
Sold_New_Customer__c+GC_Sold_Add_ons__c) )&"  
/* Values as a percentage of the total */
```

```
&chs=230x75  
/* Chart size in pixels */
```

```
&chco=CCCCCC,236FBD  
/* Chart Colors */
```

```
&chl=New Customer|Add-Ons","Sales breakdown"),  
/* Chart legend */
```

```
image("http://chart.apis.google.com/chart?cht=p&chd=t:0,0&chs=230x75&chco=CCCCCC,236FBD","Sa  
les breakdown"))  
/* if there are no sales, we display an empty chart */
```

Sales vs target



This google chart is showing you the situation of your current sales against the sales target for the year. It is using 2 new custom fields :

- o “Sales Target” which is an editable currency field where you can store your sales target for the account.
- o “Sold 2010” which calculates the amount sold in 2010 (in the future, you will need to replace this field with “sold 2011”, “sold 2012”, etc...)

The formula used to display the chart is using the following syntax:

```
IF( GC_Sales_target_this_year__c <> 0,  
/* If a yearly sales target is defined */
```

```
image("http://chart.apis.google.com/chart?cht=gom  
/* Google Chart with type "Speedometer" */
```

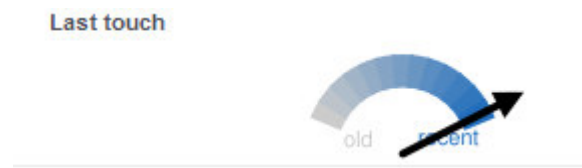
```
&chd=t:&TEXT(100 * GC_Sold_2010__c /  
GC_Sales_target_this_year__c )&"&chs=200x75&chco=CCCCC,236FBD&chl=","Sales vs target"),  
/* Value as a percentage of the sales target */
```

```
image("http://chart.apis.google.com/chart?cht=gom&chco=CCCCC,236FBD&chd=t:&TEXT(0 )&"&chs  
=200x75&chl=","Sales vs target"))  
/* If a yearly sales target is not defined, displays an empty chart */
```

This Google Chart requires a yearly maintenance:

- o Each year, you will need to edit the formula and replace GC_Sold_2010__c with the amount sold in the current year.
- o If your sales target for this account has changed, you will need to edit it as well

Last touch



This Google chart is showing you how recent was your last action on an account. If it is recent the arrow will be in the blue area, if there has not been any action in the last 100 days, it will be in the very gray.

This chart is using a new custom field which is a formula "Days since last update or activity". This formula calculates the number of days since the last record update or the last related activity (unless the last activity completed is in the future)

The formula used to display the chart is using the following syntax:

```
image("http://chart.apis.google.com/chart?cht=gom  
/* Google Chart with type "Speedometer" */
```

```
&chd=t:"&TEXT(100- GC_Days_since_last_update_or_activity__c )&"  
/* Value, minimum if the account has not been touched since 100 days or more ; maximum if the  
account has been touched today */
```

```
&chs=200x75  
/* Chart size in pixels */
```

```
&chco=cccccc,236FBD  
/* Chart colors */
```

```
&chxt=x,y&chxl=0:||1:|old|recent","Last touch")  
/* Legend */
```