

Activity Scorecard Component

Configuration Instructions



Installation

Basic Install



Install the component like any other AppExchange package

- For simplicity, you can choose “Install for all users” if you are unsure of what option to choose.



Install Activity Scorecard Component

By Salesforce Labs



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

InstallCancel

App Name	Publisher	Version Name	Version Number
Activity Scorecard Component	Salesforce Labs	With Auto Reports	1.5

Description

Wouldn't it be great to have a visually stunning component for your team to see exactly how they are performing against their activity goals and KPIs? This Activity Scorecard provides all that in a highly-configurable package to suit your exact needs!

[Additional Details](#) [View Components](#)



Installation

Components



For reference, these are the included components as of release 1.5.0

- Apex Classes → Drive the dynamic reporting aspects of the component.
- Reports → Default reports to populate the component (example reports)
- LWC → Core LWC

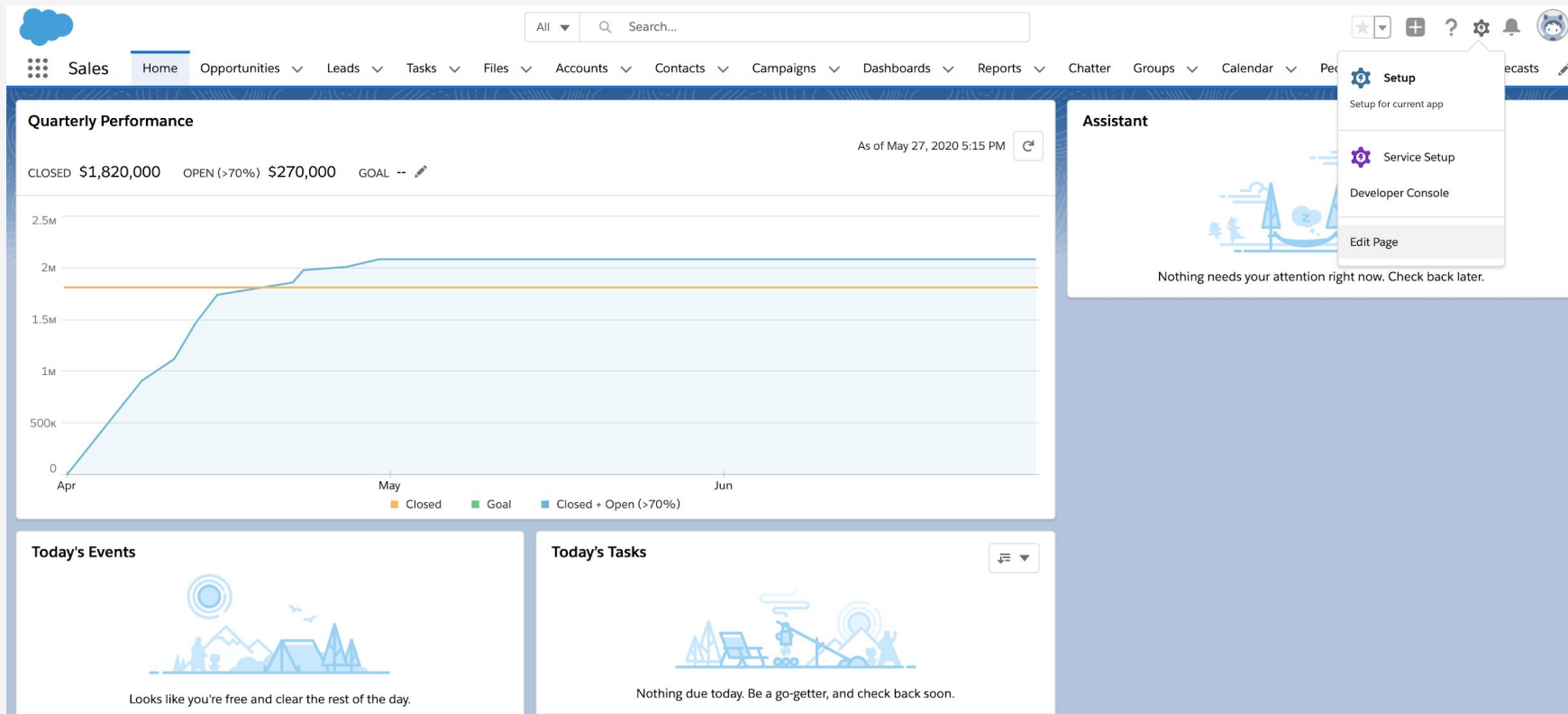
Package Components				
▼ Code (10)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	ReportsPicklistCalls		Apex Class	This is a brand new component.
Create	ReportsPicklistKPI2		Apex Class	This is a brand new component.
Create	ReportsPicklistKPI1		Apex Class	This is a brand new component.
Create	ReportsPicklistEvents		Apex Class	This is a brand new component.
Create	ReportsPicklistTasks		Apex Class	This is a brand new component.
Create	ReportsPicklistTest		Apex Class	This is a brand new component.
Create	ReportsValues		Apex Class	This is a brand new component.
Create	ReportsPicklist		Apex Class	This is a brand new component.
Create	ReportsPicklistEmails		Apex Class	This is a brand new component.
Create	ReportsValuesTest		Apex Class	This is a brand new component.
▼ Resources (7)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	My Completed Calls (Last 7 Days)		Report	This is a brand new component.
Create	Opportunities Created (Last 7 Days)		Report	This is a brand new component.
Create	Leads Created (Last 7 Days)		Report	This is a brand new component.
Create	My Sent Emails (Last 7 Days)		Report	This is a brand new component.
Create	Activity Scorecard Reports - EXAMPLES		Report Folder	This is a brand new component.
Create	My Logged Events (Last 7 Days)		Report	This is a brand new component.
Create	My Completed Tasks (Last 7 Days)		Report	This is a brand new component.
▼ Pages (1)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	activityScorecard		Lightning Web Component Bundle	This is a brand new component.

Configuration

Placing onto the Home Page

To get started, place the component on any app's homepage

- It can also be placed inside its own Lightning App in a standalone or mobile use case



Configuration

Selecting the component

Drag and drop the component onto the screen

- TIP: Search for 'activity' to help locate the component in your org

The screenshot displays the Salesforce Lightning App Builder interface. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Home Page Default'. Below the navigation bar, there are controls for 'Desktop' view, 'Shrink To View', and a 'Refresh' button. The left sidebar, titled 'Components', contains a search bar with the text 'activity' and a list of component categories: 'Standard (0)', 'Custom (0)', and 'Custom - Managed (1)'. The 'Activity Scorecard' component is highlighted with a green checkmark. The main workspace shows a preview of the configured home page. It features a 'Quarterly Performance' chart with a line graph showing 'Closed' (orange), 'Goal' (green), and 'Closed + Open (>70%)' (blue) over time. Below the chart are sections for 'Today's Events', 'Today's Tasks', 'Recent Records', and 'Key Deals - Recent Opportunities'. The 'Assistant' component is also visible on the right side of the workspace.

Lightning App Builder Pages Home Page Default

Desktop Shrink To View Refresh

Components

activity

Standard (0)

Custom (0)

Custom - Managed (1)

Activity Scorecard

Quarterly Performance

As of May 27, 2020 5:15 PM

CLOSED \$1,820,000 OPEN (>70%) \$270,000 GOAL

2.5M 2M 1.5M 1M 500k 0

Apr May Jun

Closed Goal Closed + Open (>70%)

Today's Events

Looks like you're free and clear the rest of the day.

View Calendar

Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

View All

Recent Records

Jonathan Linn

Sample Flow Report: Screen Flows

Bertha Boxer

Key Deals - Recent Opportunities

No deals yet. Select another filter or check back later.

Get more on the AppExchange

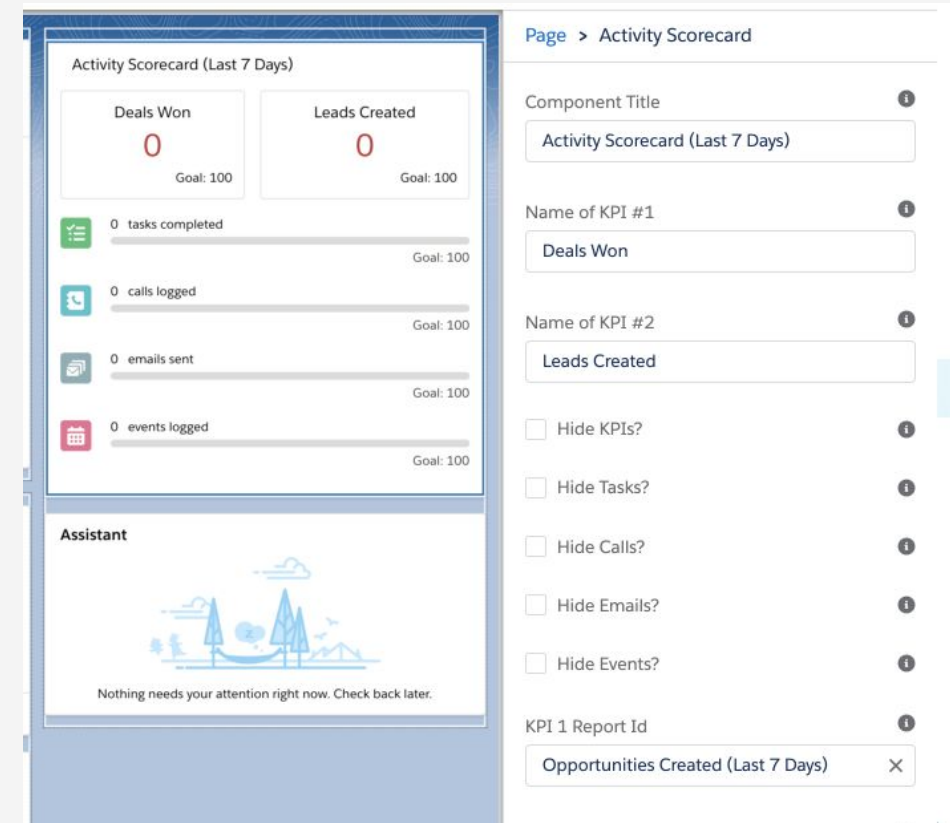


Configuration

Basic Settings

The component should render once on the page

- Its default settings will look similar to this image



Configuration

Basic Options

Title and KPI names

- You can customize these to make them specific to your use case

“Hide” options

- If there are certain KPIs or metrics that you do not track, you can choose to hide them from the component
- NOTE: These options are universal and effect all users of the component in an org

Page > Activity Scorecard

Component Title ⓘ
Activity Scorecard (Last 7 Days)

Name of KPI #1 ⓘ
Deals Won

Name of KPI #2 ⓘ
Leads Created

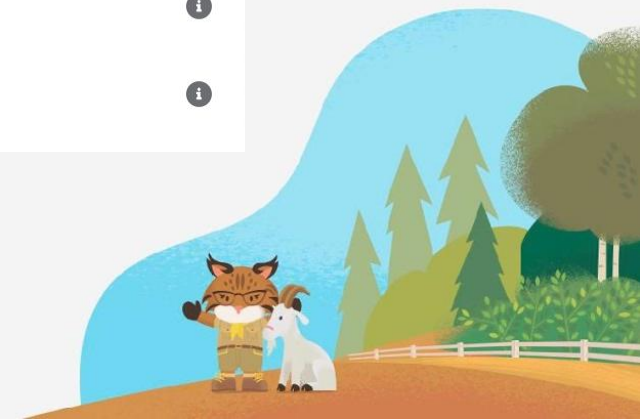
☐ Hide KPIs? ⓘ

☐ Hide Tasks? ⓘ

☐ Hide Calls? ⓘ

☐ Hide Emails? ⓘ

☐ Hide Events? ⓘ



Configuration

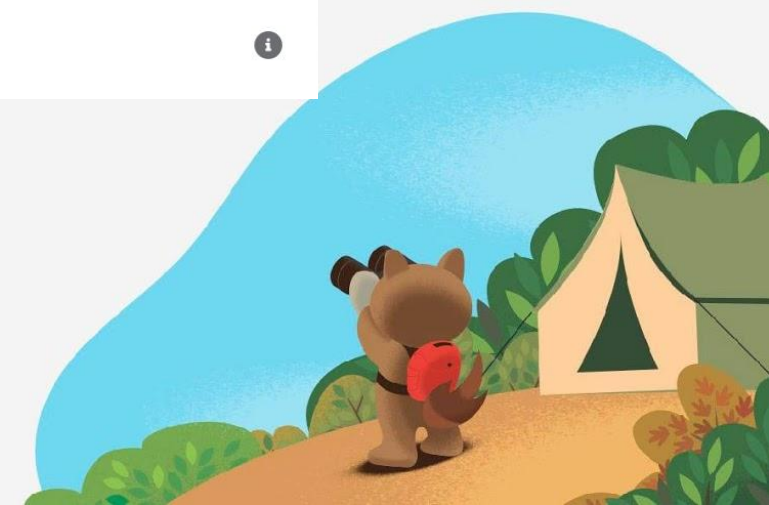
KPIs

The two largest numbers are the ‘KPIs’

- Like all metrics, they are driven by selectable reports (more info later)
- They also have goal values that can be customized

“Goal Flip” Options

- Allow to use the KPIs in cases where you are trying to *minimize* the KPI as opposed to *maximize* an outcome
- EXAMPLE: Average first-call resolution time [minimize] vs. Cases closed this week [maximize]



KPI 1 Report Id	Opportunities Created (Last 7 Days) X
KPI 1 Goal	100
☐ KPI 1 Goal Flip	
KPI 2 Report Id	Leads Created (Last 7 Days) X
KPI 2 Goal	100
☐ KPI 2 Goal Flip	

Configuration

Activity Goals

Activity metrics can be customized

- They follow the same logic as the KPIs
- The naming (Task, Call etc.) matches the icon, but could be any report you would like.

Task Report

My Completed Tasks (Last 7 Days)

Task Goal

100

Call Report

My Completed Calls (Last 7 Days)

Call Goal

100

Email Report

My Sent Emails (Last 7 Days)

Email Goal

100

Event Report

My Logged Events (Last 7 Days)

Event Goal

100



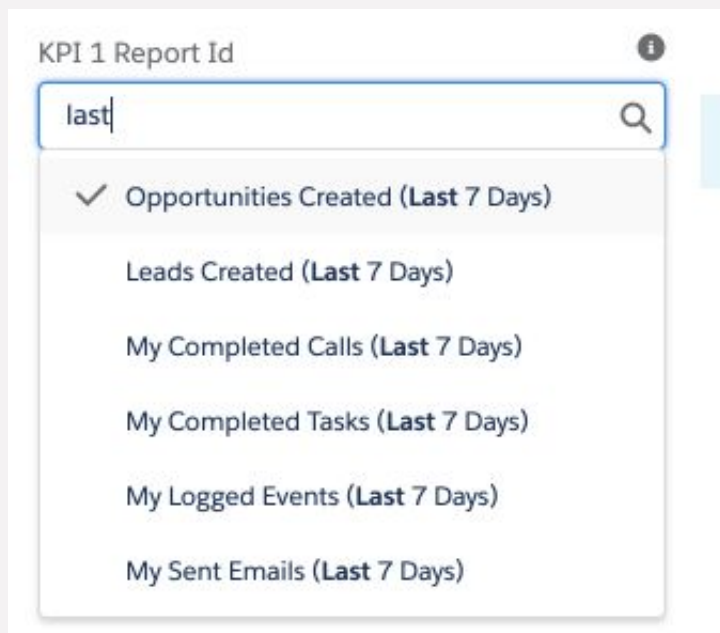
Configuration

Report Selection



All metrics on the component are driven by reports

- You can choose any report you have access to inside of the org.
- The component includes and selects a few 'Last 7 Days' reports to get you started
- To select a different report, begin typing the name of the report, and the list will auto-filter



Configuration

Report Considerations



The value displayed is the **FIRST** summarized value on the report

- If a value *is not* specifically selected, it will return a 'record count'

Metrics **can be** affected by the logged-in user

- For example, if the opportunities are filtered on 'owned by me', then the report will return only *my opportunities* and the component will reflect this.





thank
you

BLAZE
YOUR
TRAIL

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