

THE GARY SMITH PARTNERSHIP

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GSP Target Tracker

Configuration / Setup Guide



GSP Target Tracker

USER AND SETUP GUIDE

Version: 1.6



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1 Introduction

Welcome to the GSP Target Tracker!

The Tracker is the most powerful, yet straightforward way to measure sales versus target in Salesforce.

It's ready to use out-of-the-box. However, there are also several items that you can adjust to tailor the app to your specific needs.

The purpose of this guide is to:

- Describe the out-of-the-box features that are ready to use right now.
- Explain how to adjust the app further, should you need to.
- Answer those Frequently Asked Questions.

If you have another question or get stuck, don't hesitate. Get in touch with using the Contact Us page on our website.

<http://garysmithpartnership.com/contact-us>

With that, let's start with how to set up targets for salespeople.

2 Setting Up and Managing Targets

You can create monthly, quarterly or annual salesperson targets in the GSP Target Tracker. There are two ways to create and set up these targets.

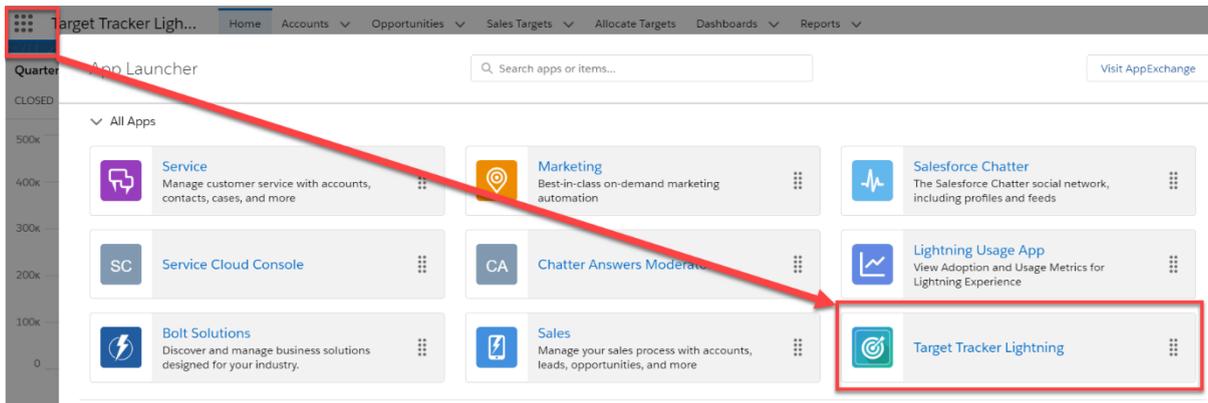
- 1) Use the Allocate Targets page (monthly targets only).
- 2) Use the Apex Data Loader to create monthly, quarterly or annual targets.

The most common approach is to use the Allocate Targets page to create monthly targets, so let's start with that.

2.1 Create Monthly Targets

The Allocate Targets page is a quick and straightforward way to create monthly targets. No technical experience or know-how is needed to use the Allocate Targets page.

To begin, select the GSP Target Tracker app. In Lightning you do this by clicking on the nine-dot matrix at the left-hand end of the tabs, then on the GSP Target Tracker app.

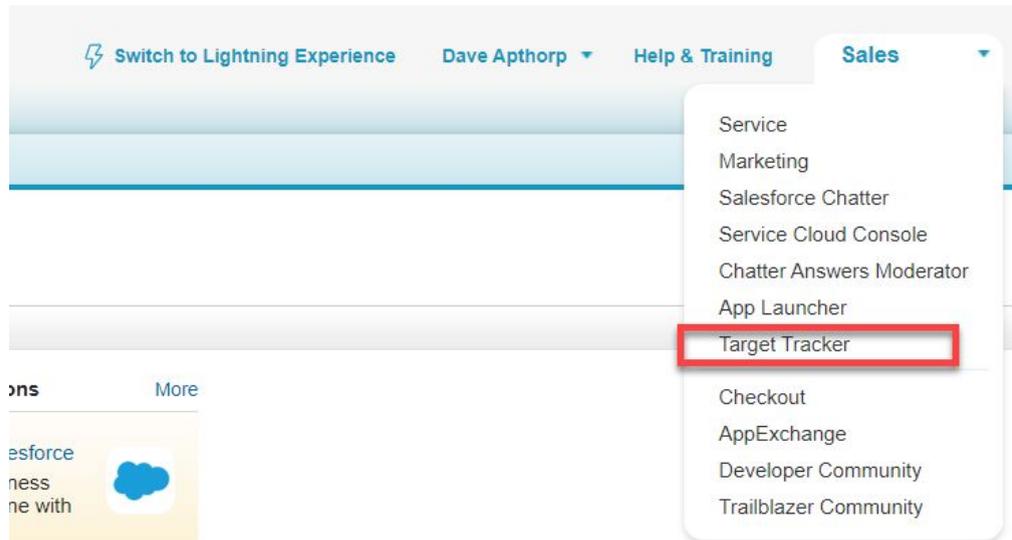


If you're using the Classic interface, select the GSP Target Tracker app from the menu in the top right.

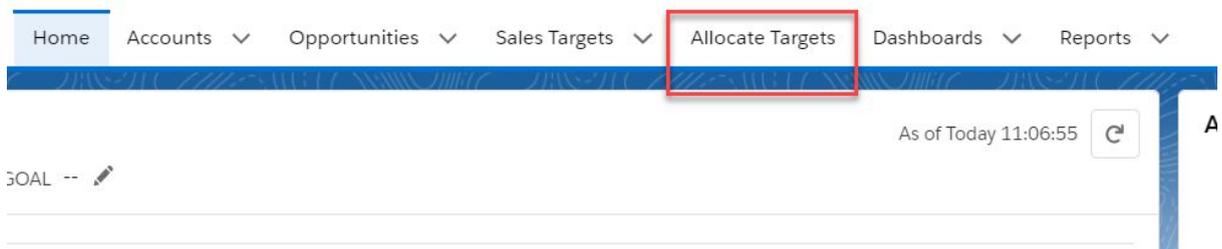
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In either case, you're now ready to click the Allocate Targets tab.



On the Allocate Targets page, start by select the Users for whom you want to create targets. In this case, we'll create targets for three people.

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 **Users**
Target Allocation

Please select Users to manage their Sales Targets and click Next Next

Users

<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	James Adams
<input type="checkbox"/>	Michelle Watkins
<input checked="" type="checkbox"/>	Nick Ambrose
<input checked="" type="checkbox"/>	Sarah Peters

Page 1 of 1 in 4 Results [Previous](#) | [Next](#)

Next

On the following page, select the Calendar Year for which you want to create targets.

If your Financial Year isn't the same as the Calendar Year, allocate targets first for the current calendar year; then repeat the process to allocate targets for the following calendar year.

If you don't yet know the target for the full year, no problem. Create targets with a value of zero and update them later using the Allocate Targets page.

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Monthly Sales Targets Target Allocation

Calendar Year: 2020 ▼			
User	Jan	Feb	Mar
James Adams	01/01/2020 <input type="checkbox"/>	01/02/2020 <input type="checkbox"/>	01/03/2020 <input type="checkbox"/>
	Monthly Target: 0	Monthly Target: 0	Monthly Target: 0
Nick Ambrose	01/01/2020 <input type="checkbox"/>	01/02/2020 <input type="checkbox"/>	01/03/2020 <input type="checkbox"/>
	Monthly Target: 0	Monthly Target: 0	Monthly Target: 0
Sarah Peters	01/01/2020 <input type="checkbox"/>	01/02/2020 <input type="checkbox"/>	01/03/2020 <input type="checkbox"/>
	Monthly Target: 0	Monthly Target: 0	Monthly Target: 0

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After this, you can enter targets individually for each month. However, a quicker way is to enter a target into the Target Amount field; then select the columns or rows to which you want to apply this target.

Save											
Calendar Year: 2020 ▼											
Target Amount: 20000 Copy to all selected											
Targets											
User	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	
James Adams	01/01/2020 <input checked="" type="checkbox"/>	01/02/2020 <input checked="" type="checkbox"/>	01/03/2020 <input checked="" type="checkbox"/>	01/04/2020 <input checked="" type="checkbox"/>	01/05/2020 <input checked="" type="checkbox"/>	01/06/2020 <input checked="" type="checkbox"/>	01/07/2020 <input checked="" type="checkbox"/>	01/08/2020 <input checked="" type="checkbox"/>	01/09/2020 <input checked="" type="checkbox"/>	01/10/2020 <input checked="" type="checkbox"/>	
	Monthly Target: 0										
Nick Ambrose	01/01/2020 <input type="checkbox"/>	01/02/2020 <input type="checkbox"/>	01/03/2020 <input type="checkbox"/>	01/04/2020 <input type="checkbox"/>	01/05/2020 <input type="checkbox"/>	01/06/2020 <input type="checkbox"/>	01/07/2020 <input type="checkbox"/>	01/08/2020 <input type="checkbox"/>	01/09/2020 <input type="checkbox"/>	01/10/2020 <input type="checkbox"/>	
	Monthly Target: 0										
Sarah Peters	01/01/2020 <input type="checkbox"/>	01/02/2020 <input type="checkbox"/>	01/03/2020 <input type="checkbox"/>	01/04/2020 <input type="checkbox"/>	01/05/2020 <input type="checkbox"/>	01/06/2020 <input type="checkbox"/>	01/07/2020 <input type="checkbox"/>	01/08/2020 <input type="checkbox"/>	01/09/2020 <input type="checkbox"/>	01/10/2020 <input type="checkbox"/>	
	Monthly Target: 0										

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Save

In this case, we are creating a target of \$20,000 per month for James Adams.

Enter a target figure for each User / month then click Save.

If the target figure is not yet published for all months, it's best practice to create the target with a figure of zero and modify the amount later.

Now go to the Sales Targets tab; click on the All Targets List View. You should see the targets you've just created.

By the way, opportunities will link automatically to the relevant targets when you create the target records. There's no need to manually link opportunities to targets.

2.2 Create Quarterly or Annual Targets

By default, the Target Tracker app assumes you are using monthly sales targets.

However, if your company uses quarterly or annual targets, you can make some simple adjustments to incorporate these target records.

There are two steps, explained carefully below.

1. Update the MST Target Period custom setting.
2. Use the Data Loader to import Quarterly or Annual Targets.

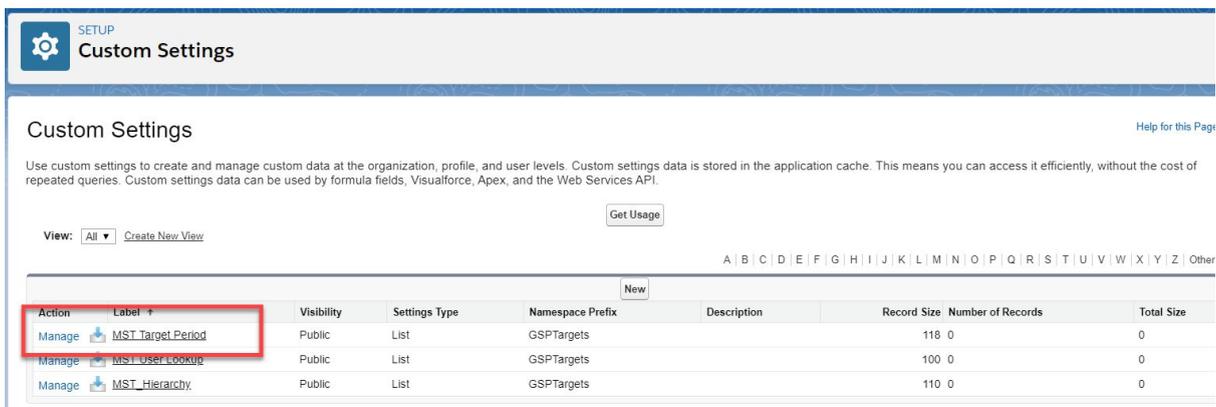
Let's take them one at a time.

2.2.1 Update the MST Target Period Custom Setting

Do the following:

Here's what to do (works in both Lightning and Classic):

1. Search for Custom Settings in the setup search box.
2. Click on Manage next to the MST Target Period custom setting.



Custom Settings

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

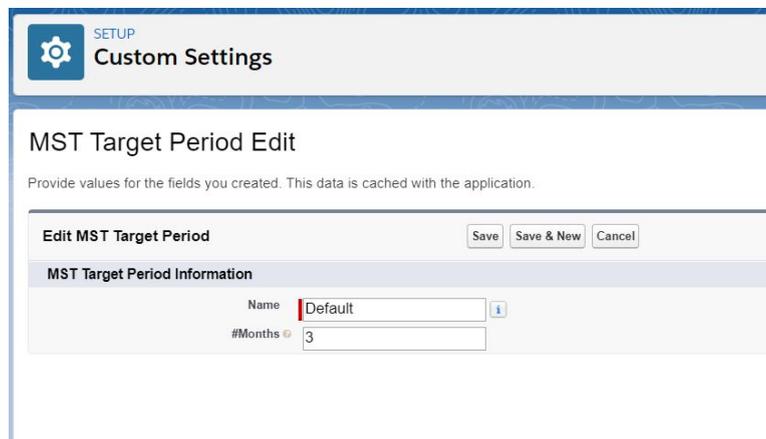
View: All Create New View

Get Usage

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	MST Target Period	Public	List	GSPTargets		118	0	0
Manage	MST User Lookup	Public	List	GSPTargets		100	0	0
Manage	MST Hierarchy	Public	List	GSPTargets		110	0	0

3. Hit the New button and create a new record with the following values:
Name: Default
#Months: 3 or 12

For quarterly targets, enter 3 into #Months. For annual targets, enter 12.



MST Target Period Edit

Provide values for the fields you created. This data is cached with the application.

Edit MST Target Period Save Save & New Cancel

MST Target Period Information

Name Default

#Months 3

4. Hit Save.

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Now you're ready to create the targets. Here's what to do.

1. Manually create a single target for one User.

Do this by clicking the Sales Targets tab, then New. You only need to populate the following four fields:

- Calendar Year
- Calendar Month
- Sales Person
- Target.

	A	B	C	D
	GSPTARGETS__CALENDAR_MONTH__C	GSPTARGETS__CALENDAR_YEAR__C	GSPTARGETS__SALES_PERSON__C	GSPTARGETS__MONTH_TARGET__C
1				
2	01-Jan	2020	0053z00000BGxYVAA1	10000
3	02-Feb	2020	0053z00000BGxYVAA1	10000
4	03-Mar	2020	0053z00000BGxYVAA1	10000
5	04-Apr	2020	0053z00000BGxYVAA1	10000
6	05-May	2020	0053z00000BGxYVAA1	10000
7	06-Jun	2020	0053z00000BGxYVAA1	10000
8	07-Jul	2020	0053z00000BGxYVAA1	10000
9	08-Aug	2020	0053z00000BGxYVAA1	10000
10	09-Sep	2020	0053z00000BGxYVAA1	10000
11	10-Oct	2020	0053z00000BGxYVAA1	10000
12	11-Nov	2020	0053z00000BGxYVAA1	10000
13	12-Dec	2020	0053z00000BGxYVAA1	10000

2. Export this target using the Apex Data Loader. Doing this is a quick and easy way to create the MS Excel template for importing additional targets.

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You only need to include the same four fields in the export. However, if you use multi-currency, include the Currency field.

Also, if you are creating annual targets, set the Calendar Month to be the first month to be the first month of the new financial year.

3. Manually delete the Sales Target you initially created. This is so that you don't get a duplicate when doing the import in Step 4.
4. In the spreadsheet, enter values for:
 - Calendar Year
 - Calendar Month
 - Target Amount
 - Currency (if using multi-currency).

	A	B	C	D
1	GSPTARGETS__CALENDAR_MONTH__C	GSPTARGETS__CALENDAR_YEAR__C	GSPTARGETS__SALES_PERSON__C	GSPTARGETS__MONTH_TARGET__C
2	01-Jan	2020	0053z00000BGxYVAA1	10000
3	02-Feb	2020	0053z00000BGxYVAA1	10000
4	03-Mar	2020	0053z00000BGxYVAA1	10000
5	04-Apr	2020	0053z00000BGxYVAA1	10000
6	05-May	2020	0053z00000BGxYVAA1	10000
7	06-Jun	2020	0053z00000BGxYVAA1	10000
8	07-Jul	2020	0053z00000BGxYVAA1	10000
9	08-Aug	2020	0053z00000BGxYVAA1	10000
10	09-Sep	2020	0053z00000BGxYVAA1	10000
11	10-Oct	2020	0053z00000BGxYVAA1	10000
12	11-Nov	2020	0053z00000BGxYVAA1	10000
13	12-Dec	2020	0053z00000BGxYVAA1	10000

5. Import the Targets using the Data Loader. (Remember to delete the manually created target from the spreadsheet before performing the import).

3 Editing Target Records

Now that you've setup the targets, you might want to change them. For example, the target amounts have changed.

No problem.

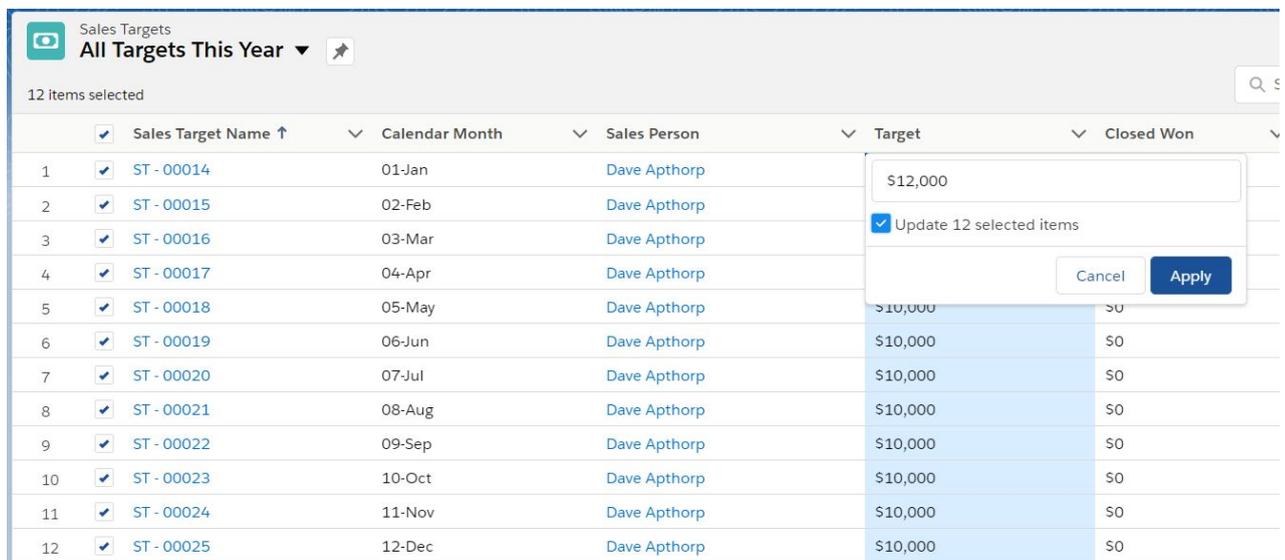
There's three easy ways to do this.

1. Use the Allocate Targets page to update monthly targets.

The process is very similar to when you created the targets. This time, just change the target amounts.

2. Use a List View.

This approach works for monthly, quarterly and annual targets. Use the mass inline editing facility on List Views to update multiple records.



The screenshot shows a web application interface for 'Sales Targets'. At the top, it says 'All Targets This Year' with a search icon. Below that, it indicates '12 Items selected'. The main part of the interface is a table with columns: 'Sales Target Name', 'Calendar Month', 'Sales Person', 'Target', and 'Closed Won'. The table contains 12 rows, each representing a target for a specific month from January to December, all assigned to 'Dave Apthorp'. The 'Target' column shows values ranging from \$10,000 to \$12,000. A dialog box is open over the table, showing a text input field with '\$12,000', a checked checkbox for 'Update 12 selected items', and 'Cancel' and 'Apply' buttons.

	<input checked="" type="checkbox"/>	Sales Target Name ↑	Calendar Month	Sales Person	Target	Closed Won
1	<input checked="" type="checkbox"/>	ST - 00014	01-Jan	Dave Apthorp	\$12,000	\$0
2	<input checked="" type="checkbox"/>	ST - 00015	02-Feb	Dave Apthorp	\$10,000	\$0
3	<input checked="" type="checkbox"/>	ST - 00016	03-Mar	Dave Apthorp	\$10,000	\$0
4	<input checked="" type="checkbox"/>	ST - 00017	04-Apr	Dave Apthorp	\$10,000	\$0
5	<input checked="" type="checkbox"/>	ST - 00018	05-May	Dave Apthorp	\$10,000	\$0
6	<input checked="" type="checkbox"/>	ST - 00019	06-Jun	Dave Apthorp	\$10,000	\$0
7	<input checked="" type="checkbox"/>	ST - 00020	07-Jul	Dave Apthorp	\$10,000	\$0
8	<input checked="" type="checkbox"/>	ST - 00021	08-Aug	Dave Apthorp	\$10,000	\$0
9	<input checked="" type="checkbox"/>	ST - 00022	09-Sep	Dave Apthorp	\$10,000	\$0
10	<input checked="" type="checkbox"/>	ST - 00023	10-Oct	Dave Apthorp	\$10,000	\$0
11	<input checked="" type="checkbox"/>	ST - 00024	11-Nov	Dave Apthorp	\$10,000	\$0
12	<input checked="" type="checkbox"/>	ST - 00025	12-Dec	Dave Apthorp	\$10,000	\$0

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3. Use the Apex Data Loader.

Likewise, this approach can be used on monthly, quarterly or annual targets.

Export the existing targets (remember to include the Sales Target Id). Update the Month Target field in Excel. Perform an update on the Sales Target object.

4 Exclude Opportunities from Targets

Sometimes you want to exclude certain types of opportunity from the Target Tracker app.

For example, let's say you have New Customer and Renewal opportunities. Let's also assume only the New Customer opportunities count towards the target.

No problem, all you need do is exclude the Renewal opportunities.

Here's how to do that.

You need to automatically populate a checkbox field on the Opportunity, 'Do Not Link To Target'.

If this checkbox is True (in other words, has a tick mark in it) the opportunity will not link to a target. This means the values from the opportunity will not roll up to the target record.

In most cases, the easiest way to automatically set this field to True, is to create a Workflow Rule and Field Update. Use the business logic that's relevant to your business to set the Do Not Link To Target checkbox to True, for the relevant records.

5 Use a custom Opportunity field instead of Amount

To compare sales performance against target, the GSP Target Tracker app uses the Opportunity Amount field by default.

However, not every business uses the Opportunity Amount field. For example, you may use ARR (Annual Recurring Revenue) or Margin to compare sales revenue with target.

No problem.

We offer a free service to modify the app so that it uses a custom field on the Opportunity, rather than the Amount.

Visit our [Contact Us](#) page and get in touch to take advantage of this free customization service.

<https://garysmithpartnership.com/contact-us/>

6 Change the Reports and Dashboard Charts

The GSP Target Tracker comes with a pre-built Dashboard and set of reports.

Here's how to view the dashboard:

- In Lightning, click on the Dashboards tab. Then, on the left-hand side click All Folders. Click on the Targets Dashboard folder, then on the Company Target Dashboard (Lightning).
- In Classic, click on the Dashboards tab. In the dashboard picklist select Company Target Overview (Classic).

You can modify the reports in both Lightning and Classic. To do this, start by navigating to the underlying report. Click Save As, to create a new version of the report. Then adjust the report to reflect your sales structure.

It's also possible to create a new version of the dashboard. A good place to start is by creating a new version of the dashboard; use Save As to create the new dashboard.

7 Frequently Asked Questions

Here's the answer to some common questions:

I want to schedule revenue from opportunities over time. It's the scheduled revenue I want to compare to targets, rather than the total opportunity amount. How do I do this?

You need our GSP Revenue Schedules app. This allows salespeople to quickly and easily schedule opportunity product revenue over time. You can create targets based on the scheduled revenue rather than the full opportunity amount.

Here's where you can find the Revenue Schedules app on the AppExchange:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FeFdGUAV>

Alternatively, search for revenue schedules in the AppExchange search box.

Can I install the Target Tracker in my sandbox to test it?

Yes, login to the AppExchange using your normal production username and password. Click the Get It Now button on the Target Tracker listing. You'll be asked whether you want to install the app into your production or sandbox environment.

I got an install error 'User doesn't have permission to create dashboard with colors'.

We've changed some of the colors on the Target Tracker dashboard from the standard colors in order to improve the impact. This installation error happens if the system administrator (or other user installing the app) hasn't previously been given the permission to change dashboard colors.

There are some simple steps to correct this that you can find here.

https://help.salesforce.com/articleView?id=000349418&language=en_US&mode=1&type=1

Follow the instructions, then re-install the Target Tracker app.

I got an install error 'The ActionId specified was invalid for ActionType Quick Action'.

You haven't got Chatter enabled in your Salesforce environment. Your company doesn't need to use Chatter, but you need to have it enabled (including the Actions In the Publisher setting).

To do this, search for Chatter Settings in the configuration search box. Click the Edit button. Enable Chatter AND the "Actions In the Publisher" setting further down the page.

You should now be good to install the Target Tracker app.

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Can I have a free trial?

Yes, everyone gets a 14-day free trial to test and evaluate the app. You can uninstall the app at any time if you decide not to go ahead.

How do I buy the GSP Target Tracker?

After you've installed the trial version of the app, go back to the AppExchange listing. Login to the AppExchange using your username and password.

The Get It Now button will have changed to a Buy Now button. Click the button and follow the instructions.

If you've previously installed a trial version of the app in Production, you won't lose your existing data. The app will be upgraded to a paid-for version which means you can continue to use both the app and the data you've already created.

I want to go ahead and purchase the app. How long is the contract for?

There's no long-term contract or commitment. We charge a monthly fee via the AppExchange. You can uninstall the app at any time and the monthly subscription will be automatically cancelled.

Does any data in the Target Tracker leave my Salesforce environment?

No, all data remains within your Salesforce system.

Can GSP see the target or opportunity data?

No, we have no visibility of any data within your Salesforce environment.

Is it possible to customize the GSP Target Tracker further?

Yes, many of our customers have unique customizations based on company-specific needs. Get in touch (see below) to talk to us.

I have a question or need some help. What do I do?

Don't hesitate, get in touch with us. Here's the link to our Contact Us page.

<https://garysmithpartnership.com/contact-us/>

Alternatively, search for The Gary Smith Partnership in Google. Click on the Contact Us tab on our website.

Remind me where I can find the GSP Target Tracker on the AppExchange.

Here's the Listing:

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000Fvlf6UAF>

Or search for Targets in the AppExchange search box.

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8 Get More Help

Do not hesitate to get in touch if you have any questions about the GSP Target Tracker, or any of our other apps.

It's easy to do; simply go to our website and enter your details into the Contact Us form. We'll reply to you and arrange a good time to talk.

<https://garysmithpartnership.com/contact-us>