Data Analysis Helper and Analytics Package Admin Guide

Contents

Getting Started — Setup

1. If you have not already done so, [install Data Analysis Helper](#) from the AppExchange.

2. Select an Analytics Package by clicking one of the analytics package app tiles
   a. To Start a 14 day free trial you may click the 'Install 14 Day Trial' button, or reach out to sales@passagetech.com
   b. To purchase an analytics package, select "Get it Now", or "Upgrade to Premium Edition" to place your order.
      i. After order is placed installation instructions will be emailed to you including the install links.

3. App Customization:
   a. Setup>AppManager>Data Analysis Helper>Edit
      i. Select Available Tabs that you would like to see when you open the app.
         1. Check the "Overwrite Users' Personal Custom App Customizations" if you would like to update all user's tabs for the Data Analysis Helper app.
      ii. Select "Default Landing Tab" option.
      iii. Assign the app to the Profiles you would like to have access.
      iv. Save

4. User Setup:
   a. For each user that you would like to have access to Data Analysis Helper and installed extension package(s) go to Setup>Manage Users>Users
      i. Click on a user's record that you would like to access the application(s).
      ii. In Permission Set Assignments, click "Edit Assignments"
      iii. From "Available Permission Sets" select "Data Analysis Helper All Access" and any installed analytics packages respectively and Add to Enabled Permission Sets.
      iv. Save

Sales Performance Intelligence

1. Open the Data Analysis Helper app.

2. Select the Sales Performance Intelligence tile.

3. Selecting the Metrics you would like to track, Select configuration option
    a. **Default Configuration** – will set up Sales Performance Intelligence for you. This is a good option if you would like to use out of the box configuration options or you don't have a lot of customizations to make. You will be able to customize configuration options at a later time if you find that you have changes you need to make.
        i. Select the "Default Configuration" Button.
        ii. Review the lists of Apex Triggers, Custom Fields, Lookup Settings and Rollup Settings that will be added to your org.
        iii. If you are satisfied with the defaults, select "Finish".
        iv. To customize, select "Back" and select Advanced Configuration.
    b. **Advanced Configuration** - will walk you through a setup wizard that will allow you to customize what objects the information is being taken from, filters you may want to add, and notifications that will be sent.
        i. Select the "Advanced Configuration" Button.
        ii. What Metrics Would You Like To Track?
            1. "What Granularity Should Performance Be Tracked At?"
                a. Initial Setup: From the dropdown, select whether you would like to track performance Monthly, Quarterly, or Yearly
            2. Deselect any metrics you are not interested in tracking at this time (you can change this later).
                a. Note: Sales Performance Intelligence option to track metrics for Quote Status Information will only be available if you have Quotes enabled in your organization.
            3. Click "Next"
        iii. Where Is Your Data Stored? Object Selections
            1. Select the Salesforce object(s) where the data is stored in your org.
            2. Click "Next"
        iv. Custom Object Logic
            1. For each Metric, expand the accordion section to review/edit default filter criteria by object.
                a. If you add or remove filter criteria, be sure to also update the Filter Logic.
            2. Click "Next"
        v. Custom Field Selection

1. For each Metric, expand the accordion section to review default field information for which field the source data is stored in, or edit the option if this is different in your org.
2. Click "Next"
   vi. Follow-up Action / Notification Settings
      1. For each metric, expand the accordion to review/edit notification filter(s), Email Subject, Email Body, and to Activate notifications.
         a. If you add or remove filter criteria, be sure to update the Filter Logic.
         b. If you would like to use merge fields in the Email Subject, or Email Body, use: '{!' before the field api name and '}' after to include a records value in an email.
            i. For example: The record's name is: {!name}
      2. Click "Next"
   vii. Review Configuration
      1. Review the lists of Apex Triggers, Custom Fields, Lookup Settings and Rollup Settings that will be added to your org.
      2. If you are satisfied with the configuration, select "Finish".
   c. You will be directed to a Thank You page where Sales Performance Intelligence will update you on the status of your setup. **Please do not leave the page until you see the notification that setup is complete**, or rollups and lookup settings are running and it is safe to do so.
   d. Once setup is complete, check to ensure deployment was successful. Navigate to Setup>Deployment Status
      i. If you are experiencing deployment failures and need assistance, please email: support@passagetech.com

4. Package Version Updates
   a. Please email support@passagetech.com for links to the most recent version.
   b. Post-update, please return to the Data Analysis Helper setup page and select the Sales Performance Intelligence tile.
   c. Create Missing Components
      i. If additional components were included in the version update, a button will be available. Click: "Create Missing Components"
      ii. You will be directed to a Thank You page where Sales Performance Intelligence will update you on the status of your setup. **Please do not leave the page until you see the notification that setup is complete**.
   d. Once setup is complete, check to ensure deployment was successful. Navigate to Setup>Deployment Status
      i. If you are experiencing deployment failures and need assistance, please email: support@passagetech.com

5. Using Performance Comparisons: The analytics granularity (monthly, quarterly, or yearly) will be determined by your selection in the configuration step, "What Granularity Should Performance Be Tracked At?"
    a. Org Historic Comparison
        i. Select the number of previous periods you would like to display
        ii. Click "Search"
    b. Rep Historic Comparison
        i. Enter the name of a sales rep you would like to see historic performance analytics for
        ii. Select the number of previous periods you would like to display
        iii. Click "Search"
    c. Rep Leaderboard
        i. Select the Number of sales reps you would like to display
        ii. Click "Search"

Territory & Segmentation Intelligence Free Edition

1. If you have not done so already, install Territory & Segmentation Intelligence Free Edition by clicking the "Install Free Version" button after clicking on the Territory & Segment Intelligence AppTile.
2. Select the Territory & Segmentation Intelligence Tile after the install has completed.
3. Selecting the Metrics you would like to track, Select configuration option
   a. **Default Configuration** – Will set up Territory & Segmentation Intelligence for you. This is a good option if you would like to use out of the box configuration options or you don't have a lot of customizations to make. You will be able to customize configuration options at a later time if you find that you have changes you need to make.
      i. Select the "Default Configuration" Button.
      ii. Review the lists of Apex Triggers, Custom Fields, Lookup Helper Settings and Rollup Helper Settings that will be added to your org.
      iii. If you are satisfied with the defaults, select "Finish".
      iv. To customize, select "Back" and select Advanced Configuration.
   b. **Advanced Configuration** – Will walk you through a setup wizard that will allow you to customize what objects the information is being taken from, filters you may want to add, and notifications that will be sent.
      i. Select the "Advanced Configuration" Button.
      ii. What Metrics Would You Like To Track?
         1. What Granularity Should Performance Be Tracked At?
            a. Initial Setup: From the dropdown, select whether you would like to track performance Monthly, Quarterly, or Yearly
         2. How do you define territories in your organization?
            a. Initial Setup: From the dropdown, select whether you would like to track territories at the City, State, Country, or using another field on the Account object.
         3. What field on the Account object should be used to segment your data?
            a. Initial Setup: From the dropdown, select whether you would like to segment your data by Industry, Number of Employees, Annual Revenue, Account Type, or another field on the Account object.
         4. Deselect any metrics that you do not wish to track.
         5. Click "Next"
      iii. Where Is Your Data Stored? Object Selections
         1. Select the Salesforce object(s) where the data is stored in your org.
         2. Click "Next"

        iv.   Custom Object Logic
1. For each Metric, expand the accordion section to review/edit default filter criteria by object.
     a. If you add or remove filter criteria, be sure to also update the Filter Logic.
2. Click "Next"
        v.   Custom Field Selection
1. For each Metric, expand the accordion section to review default field information for which field the source data is stored in, or edit the option if this is different in your org.
2. Click "Next"
        vi.   Follow-up Action / Notification Settings
1. There are currently no Follow-up Action/Notification Settings for Territory & Segmentation Intelligence Free Edition.
2. Click "Next"
        vii.   Review Configuration
1. Review the lists of Apex Triggers, Custom Fields, Lookup Settings and Rollup Settings that will be added to your org.
2. If you are satisfied with the configuration, select "Finish".

c. You will be directed to a Thank You page where Data Analysis Helper will update you on the status of your setup. **Please do not leave the page until you see the notification that setup is complete**, or rollups and lookup settings are running and it is safe to do so.

d. Once setup is complete, check to ensure deployment was successful. Navigate to Setup>Deployment Status
        i.   If you are experiencing deployment failures and need assistance, please email: support@passagetech.com

4. Package Version Updates
a. Please email support@passagetech.com for links to the most recent version.
b. Post-update, please return to the Data Analysis Helper setup page and select the Territory & Segmentation Performance Intelligence tile.
c. Create Missing Components
        i.   If additional components were included in the version update, a button will be available. Click: "Create Missing Components"
        ii.   You will be directed to a Thank You page where Territory & Segmentation Performance Intelligence will update you on the status of your setup. **Please do not leave the page until you see the notification that setup is complete**.
d. Once setup is complete, check to ensure deployment was successful. Navigate to Setup>Deployment Status
        i.   If you are experiencing deployment failures and need assistance, please email: support@passagetech.com

5. Using Territory/Segment Comparisons
    a. Segment Historic Comparison
        i. Segment Type
            1. Type in the name of the segment you would like to display. For example, if you are segmenting by Industry, type in an Industry name.
        ii. Select the number of previous periods you would like to display
        iii. Click "Search"
    b. Segment Leaderboard
        i. Select the number of Segments you would like to display
        ii. Click "Search"
    c. Territory Historic Comparison
        i. Name of Territory
            1. Enter the City, State, or Country you would like to display based on how you defined territories
            2. Select the number of previous periods you would like to display
            3. Click "Search"
    d. Territory Leaderboard
        i. Select the number of Segments you would like to display
        ii. Click "Search"

Territory & Segmentation Intelligence Premium Edition

1. If you have not done so already, install Territory & Segmentation Intelligence Free Edition by clicking the "Install Free Version" button on the AppTile.
2. Click "Upgrade to Premium Edition" above the AppTile, then place your order by clicking "Order Premium Version"
    a. Installation instructions will be emailed to you including the install links.
    b. For a 14 day trial, or any other further assistance, please contact sales@passagetech.com.
3. Update/Enable your configuration
    a. Click the Territory & Segmentation Intelligence app tile, then click the "Edit" button if you have already configured the free edition of Territory & Segmentation Intelligence, or click the "Advanced Configuration" or "Default Configuration" button if you have not used Territory & Segmentation Intelligence before.
    b. What Metrics Would You Like to Track?
        i. Configure the granularity, territory, and segmentation definitions.
        ii. Update your preferences by selecting/deselecting the checkbox for each metric.
        iii. Click "Next"
    c. Where is Your Data Stored?
        i. Select the Salesforce object(s) where the data is stored in your org.
        ii. Click "Next"
    d. Custom Object Logic
        i. For each Metric, expand the accordion section to review/edit default filter criteria by object.
            1. If you add or remove filter criteria, be sure to also update the Filter Logic.
        ii. Click "Next"
    e. Custom Field Selection
        i. For each Metric, expand the accordion section to review default field information for which field the source data is stored in, or edit the option if this is different in your org.
        ii. Click "Next"
    f. Follow-up Action / Notification Settings
        i. For each metric, expand the accordion to review/edit notification filter(s), Email Subject, Email Body, and to Activate notifications.
            1. If you add or remove filter criteria, be sure to update the Filter Logic.
            2. If you would like to use merge fields in the Email Subject, or Email Body, use: '{!' before the field api name and '}' after to include a records value in an email.
                a. For example: The record's name is - {!name}
        ii. Click "Next"

g. Review Configuration
    i. Review the lists of Apex Triggers, Custom Fields, Lookup Helper Settings and Rollup Helper Settings that will be added to your org.
    ii. If you are satisfied with the configuration, select "Finish".
h. You will be directed to a Thank You page where Data Analysis Helper will update you on the status of your setup. **Please do not leave the page until you see the notification that setup is complete**, or rollups and lookup settings are running and it is safe to do so.
i. Once setup is complete, check to ensure deployment was successful. Navigate to Setup>Deployment Status
    i. If you are experiencing deployment failures and need assistance, please email: support@passagetech.com

Editing/Disabling Configuration After Initial Setup

1. Click on the app tile for the configuration you would like to edit/disable.
2. To edit the configuration, click the 'Edit' button.
   a. After clicking the edit button, you advance through the same setup wizard described in the steps above for the corresponding analytics package.
3. To disable configuration, you may click the 'Disable Configuration' button.
   a. Disabling configuration will disable all rollup and lookup settings preventing data from being populated and created going forward.
   b. Disabling configuration will not delete the rollup and lookup settings that were created. If you would like to delete the settings, please reach out to support@passagetech.com
4. To enable a previously disable configuration you may click the 'Enable Configuration' button.

Removing Realtime Triggers After Initial Setup

1. Click on the app tile for the configuration you would like to remove the realtime triggers for.
2. To remove the realtime triggers click the 'Remove Created Triggers' button.
   a. Once the button is pressed please **do not navigate away from the page until it states on the page that setup has completed**.
   b. Only custom realtime triggers will be removed that are used for the currently selected package. If realtime triggers were created for another extension package you will have to repeat this process for all extensions.
3. If you would like to create realtime triggers that were previously removed click on the app tile for the app you would like to create the realtime triggers for and click the 'Create Missing Components' button.
   a. After the create missing components button is pressed please **do not navigate away from the page until it states on the page that setup has completed**.