
wBenchmark User Guide

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wBenchmark User Guide

Overview

wBenchmark for Sugar is a paid add-on that can capture and store KPIs from any Sugar standard or user-defined module at specific points in time such as daily, weekly, monthly, quarterly, and yearly periods. Create custom goals, metrics, and visualizations for your organization's unique needs. This guide covers how administrators and users can engage with the wBenchmark plug-in after it has been installed to your Sugar instance. For more information on installing wBenchmark, please refer to the [W-Systems Product Installation Guide](#).

Note: This guide pertains to the latest release of wBenchmark. If you are not using the latest version, then you may not have access to some of the features listed on this page. Please refer to the [W-Systems Supported Platforms](#) page for more information on the latest package versions.

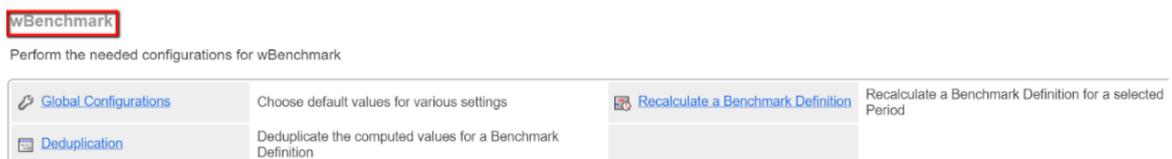
Features

- **[Build Beautiful Charts](#):** wBenchmark enables you to create chart dashlets containing easy to follow data on your KPIs, and add them to your Sugar dashboard.
- **Metrics Definitions:** wBenchmark automatically adds a new **Metrics Definition** module, where users can add new metric definition sets and detailed metric definitions.
- **[User and Team Goals](#):** wBenchmark adds a **Goals module** where Goal sets can be added for users, teams or users in teams. Goals can be defined for any recurring time period and may be different at different points in the year. wBenchmark also adds a **Default Goal Value** tab.
- **[Goal Import Tool](#):** If you need to create several goals for your metric definitions, wBenchmark enables you to import goals and skip the record creation process.
- **[Leaderboard Visualization](#):** wBenchmark adds a new leaderboard chart type to visualize a team's relative performance on a specific KPI. The leaderboard chart can track progress to goals or compare against an average.
- **[Time Series Visualization](#):** wBenchmark adds a new Time Series chart dashlet that displays metrics over time as either an **Area Chart**, a **Line Chart**, or **Stacked Bar Chart**.
- **Track KPIs From Any Time Period:** wBenchmark allows you to measure and compare performance from any time period and can be customized to your specific targets, fiscal years, and company policies.

wBenchmark Administration

Before using the wBenchmark package, an administrator must configure the necessary settings from the **wBenchmark** section on the **Administration** page. There are available three configuration options, and an administrator must also [Create Destination Module of wBenchmarkTarget type](#).

- [Global Configurations](#)
- [Deduplication](#)
- [Recalculate a Benchmark Definition](#)

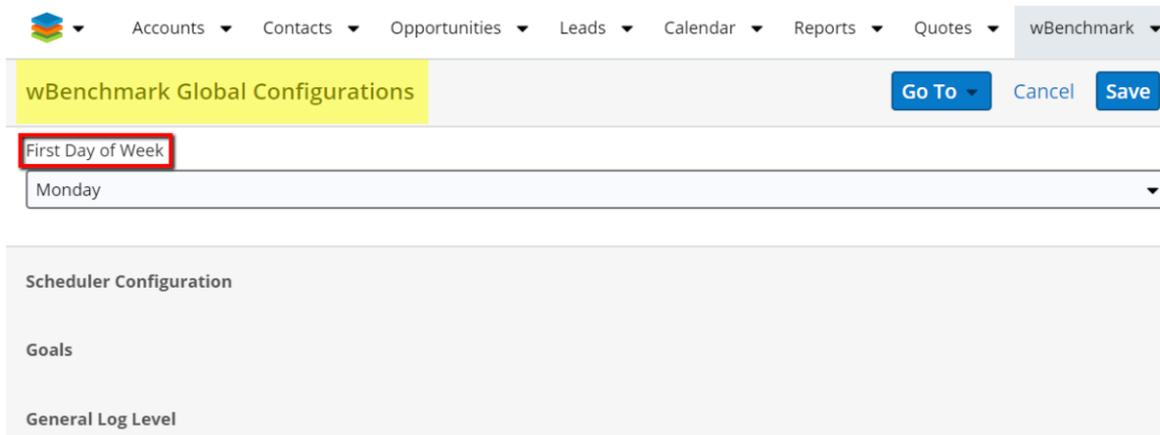


Global Configurations

On the Administration page go to the wBenchmark section and click on the Global Configurations link. Users can configure more setup options in this section.

First Day of the Week.

This dropdown menu allows users to select which weekday represents the first day of the week. Weekly, on the selected day, Benchmarks will be generated.



Scheduler Configurations.

In the Scheduler Configurations section of the **wBenchmark Global Configurations** panel are available 4 configuration options: Default Chrono Job Interval, Log Level, Job Execution Concurrency Limits, and Job Execution Postone

Time.

Default Chrono Job Interval section. Here are configured the default settings for the generated wBenchmark scheduled jobs.

The screenshot shows the 'wBenchmark Global Configurations' interface. At the top right, there are buttons for 'Go To', 'Cancel', and 'Save'. Under the 'Scheduler Configuration' section, the 'Default Crono Job Interval' is highlighted with a red box. It consists of five input fields: 'min' (5), 'hrs' (4), 'date' (3), 'mo' (2), and 'day' (1). Below this is a 'Log Level' dropdown menu currently set to 'Error'. At the bottom, there are two fields: 'Job Execution Concurrency Limits' (set to '1 running job per record') and 'Job Execution Postpone time' (set to '300').

Log Level. This dropdown field allows users to set the message that will be displayed when errors occur.

The screenshot shows the 'Log Level' dropdown menu. The 'Error' option is highlighted with a blue bar and a red box. Other options include Emergency, Alert, Critical, Warning, Notice, and Info.

Job Execution Concurrency Limits. This dropdown field allows users to set the limit of running jobs per record.

The screenshot shows the 'Job Execution Concurrency Limits' dropdown menu. The '1 running job per record' option is highlighted with a blue bar and a red box. Other options include 'No Limit' and '1 running job per entire package'.

Job Execution Postpone Time. This field allows users to set the number of seconds the Job Execution will be delayed by if the record is not available for the Job at the scheduled time.

Job Execution Postpone time

Note: Please note that wBenchmark jobs should run daily for the Benchmarks to be created and the calculated values to be updated accordingly.

Goals.

The **Goals** section lets users set **Daily, Weekly, Monthly, Quarterly, Yearly** goal definitions for the Benchmarks. The default value of this field is Weekly.

Goals

Default Goal Type

- Daily
- Weekly**
- Monthly
- Quarterly
- Yearly

General Log Level. This field allows users to set the Log Level to any value they choose from the dropdown.

General Log Level

Log Level

- Emergency
- Alert
- Critical
- Error**
- Warning
- Notice
- Info

Used DB Connections

This area lets you to **Configure the Preferred DB Instance for Performing Selects:**

wBenchmark Global Configurations Go To Cancel Save

First Day Of Week Configuration

Scheduler Configuration

Goals

General Log Level

Used DB Connections

Schedulers

Reports

Dashlets

Listviews

Save Computed Values

- If you have a DB instance (read replica - for example: reports instance or listview instance) on which the needed queries can be executed you can select it from here.
- By default the value is set to **Main Connection**. All Updates / Inserts are always executed via Sugar Default Connection.

Schedulers:

- The Connection used on Computation Logic.
- The complexity of the queries used by the schedulers are directly influenced by the definitions, filters used on definitions and the number of teams/users linked to a wBenchmark record.
- If you have a faster/powerful db instance it is strongly recommended to use it

Used DB Connections

Schedulers

Reports

Main Connection

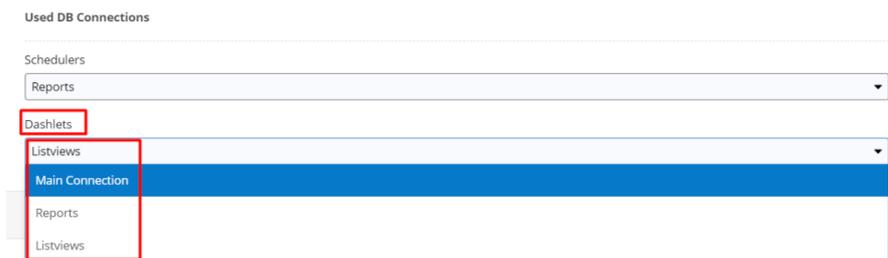
Reports

Listviews

Save Computed Values

Dashlets:

- The Connection used for retrieve the needed data for display the dashlets
- If you have a faster/powerful db instance it is preferable to use it.



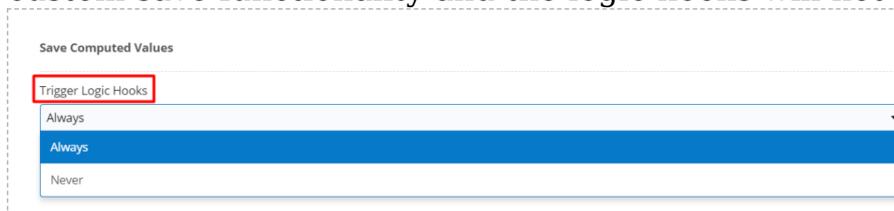
Save Computed Value

This area let you Configure the How the new Computations are saved.

Trigger Logic Hooks:

This option is used for config if SugarCRM Logic Hooks will be triggered or not when save the computed values on the destination bean

- Default value is **Always**
- Available Options are:
 - **Always** - The save of the destination bean is performed via default SugarCRM save functionality (the Logic Hooks are triggered)
 - **Never** - The save of the destination bean is performed with a custom save functionality and the logic hooks will not be triggered.



Save "No Value" Computations:

When a computation is performed it can result in a no value / result for a given user / team + group by field + period + filter applied to definition + definition. It is possible that a wBenchmark record to have no value / result for all of its definitions for a given user / team + group by field + period and in this case, the resulted record is named "No Value"

- Default value is **Never**

- Available Options are:
 - **Always** - All the generated records will be saved.
 - **Never** - Will be saved on the resulted record which has at least one definition with result.

Save Computed Values

Trigger Logic Hooks

Always

Save "No Value" Computations

Never

Always

Never

Deduplicate Calculated Benchmarks

The wBenchmark package allows users to remove the computed values for a Benchmark Definition that are duplicated. On the **Administration** page, go to the wBenchmark section and click on the **Deduplication** link.

wBenchmark

Perform the needed configurations for wBenchmark

Global Configurations	Choose default values for various settings
Deduplication	Deduplicate the computed values for a Benchmark Definition

The **Deduplication** action will not recalculate any values. It will only delete them.

Clicking on the Deduplication link will take the user to a w **Benchmark Deduplication** page where they can configure the Deduplication settings. **wBenchmark Name** is a dropdown field that displays all existing benchmarks.

wBenchmark Deduplication

wBenchmark Name

Required

B10_C10_Invoices calculations by Submit Date/Expected Close Date

B11_C11_Invoices calculations grouped by User and Invoice Status

B12_C12_Proposal/Accounts by Billing City, Team and Users

B13_C13_Account calculations grouped by Account Type AND System/Global

B14_C14_Account calculations grouped by Account Type AND Users, Teams, System/Global

B15_C15_Account calculations grouped by Account Type AND Teams

B16_C16_Account calculations grouped by Account Type AND Teams

Once a benchmark record is selected, three other fields become editable.

Select Computation Type. This is a dropdown field with the following values: Daily/Weekly/Monthly/Quarterly/Yearly. These values allow the user to set how frequently the benchmarks are generated.

Records Created From Date. This is a date-type field.

Records Created to Date. This is a date-type field.

Pressing on the "**Check for Duplicate Records**" button to see if there are any duplicated records. If there are, they will be displayed in a table like in the image below:

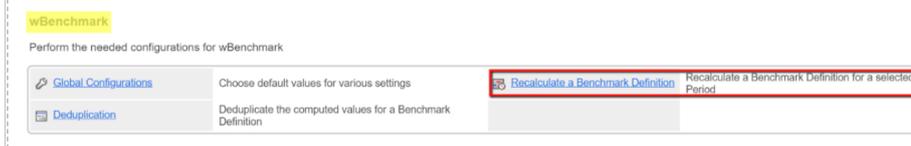
Benchmark Infos		
Current	Previous	Next

To delete duplicate records, select and delete those by using the "**Deduplicate**" button on the right side of the panel.

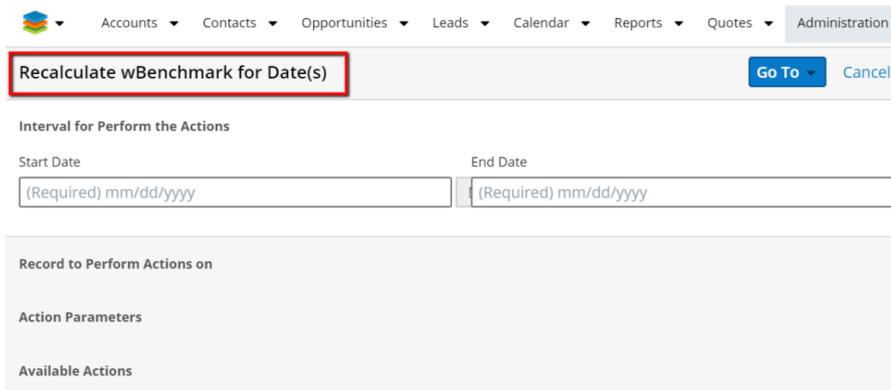
Related To	Dates		Period Info							Probability
	Created	Modified	Type	Start	End	Year	Quarter	Month	Week	
										<input checked="" type="checkbox"/>

Recalculate a Benchmark Definition

Admin users can run the scheduled job of a wBenchmark record for a selected period. To do so, go on the **Administration** page on the **wBenchmark** section. Click the "**Recalculate a Benchmark Definition**" link.

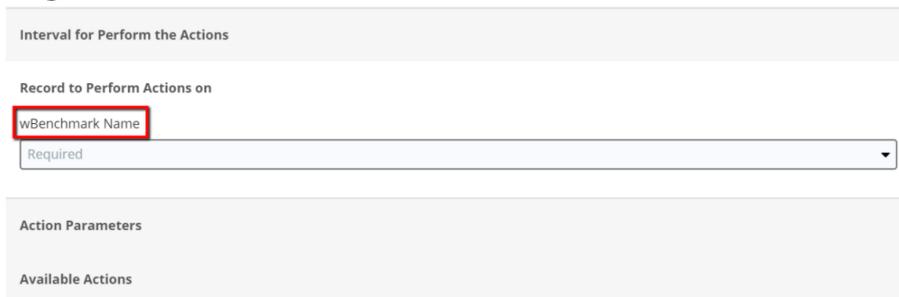


This will take you to the **Recalculate a Benchmark Definition** page.

A screenshot of the 'Recalculate wBenchmark for Date(s)' page. The page has a navigation bar with 'Administration' selected. The main heading is 'Recalculate wBenchmark for Date(s)' with a 'Go To' button and a 'Cancel' link. Below the heading, there are two date picker fields: 'Start Date' and 'End Date', both with the placeholder '(Required) mm/dd/yyyy'. Below the date fields, there are sections for 'Record to Perform Actions on', 'Action Parameters', and 'Available Actions'.

Here, users can set up the following:

wBenchmark Name. This is a dropdown field with all wBenchmark records from Sugar.

A screenshot of the 'wBenchmark Name' dropdown field. The field is labeled 'wBenchmark Name' and has a 'Required' label. The dropdown menu is currently closed, showing only the 'Required' label. Below the dropdown, there are sections for 'Action Parameters' and 'Available Actions'.

Start Date and **End Date** are date picker fields. Users can set up the period in which the wBenchmark scheduled job will run.

A screenshot of the 'Start Date' and 'End Date' date picker fields. The fields are labeled 'Start Date' and 'End Date' and have the placeholder '(Required) mm/dd/yyyy'. The 'Start Date' field is highlighted with a red box.

Snapshot with Date Created? This setting lets users decide if they want to take or not into account the **Date Created** of the records when calculating the benchmarks.

Action Parameters

Snapshot with Date Created?

Yes

Take date created on consideration when compute?

Queue the Computation? This is a setting that allows users to Compute via Queued Jobs, to avoid possible timeouts.

Action Parameters

Snapshot with Date Created?

Yes

Take date created on consideration when compute?

Queue the computation?

Yes

Compute via queued job, in order to avoid possible timeouts

Speed Up Recalculate Process. This **Yes/No** field type allows users to decide if they want to indicate certain dates to perform computations.

Speed Up Recalculate Process

No

Yes

No

Periods for Recalculate. This is a read-only field type that is available only if the **Speed Up Recalculate Process** option is set to **Yes**. It indicates the dates for which the computations will be performed.

Periods for recalculate

Days, Weeks, Months, Quarters, Years

Cancel Queued Recalculations. This button lets admin users cancel the scheduled recalculations.

Available Actions

Cancel Queued Recalculations

Watch Queued Recalculations Status

Recalculate

Watch Queued Recalculations Status. This button lets users see the status of all Queued Recalculations.

Available Actions

Cancel Queued Recalculations

Watch Queued Recalculations Status

Recalculate

Recalculate. Pressing this button will recalculate the Queued Recalculations.

Available Actions

Cancel Queued Recalculations

Watch Queued Recalculations Status

Recalculate

Create Destination Module of wBenchmarkTarget Type

To create a **wBenchmarkTarget** type module, go to the **Developer Tools** section on the Administration page. Click the **Module Builder** link in the section.

Developer Tools

Create and edit modules and module layouts, manage standard and custom fields.

 Studio	Customize module fields, layouts and relationships
 Module Builder	Build new modules to expand the functionality of Sugar
 Module Loader	Add or remove Sugar modules, themes, language packs and other extensions
 Sugar Portal	Manage the Sugar Portal
 Styleguide (Lab)	Documentation and samples
 Workflow Management	Manage workflow conditions, alerts and actions

Add "**wBenchmarkTarget**" module types. These will be used as a destination module for the compound values.

Module

Module Builder > wBenchmark_QA > New Module

Save

Package: wBenchmark_QA

* Module Name:

* Plural Label:

* Singular Label:

Allow Imports:

Team Security:

Navigation Tab:

* Type:

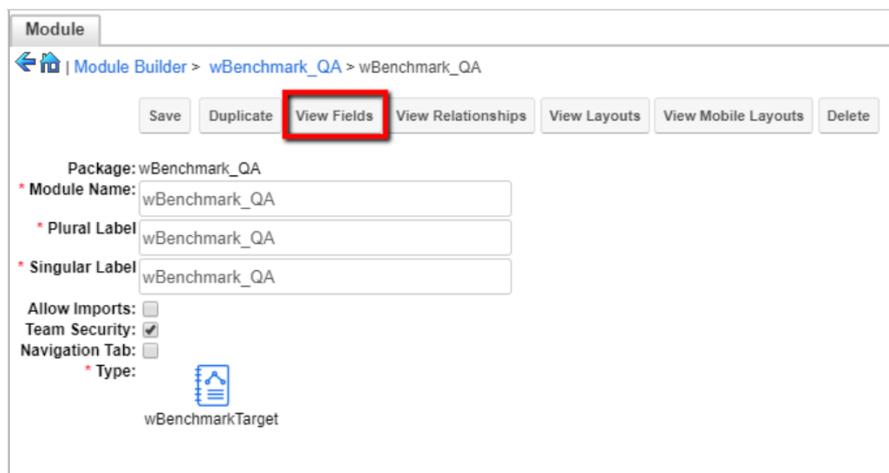
basic company file issue person sale

wBenchmarkTarget

The **wBenchmarkTarget** module type is available only after the

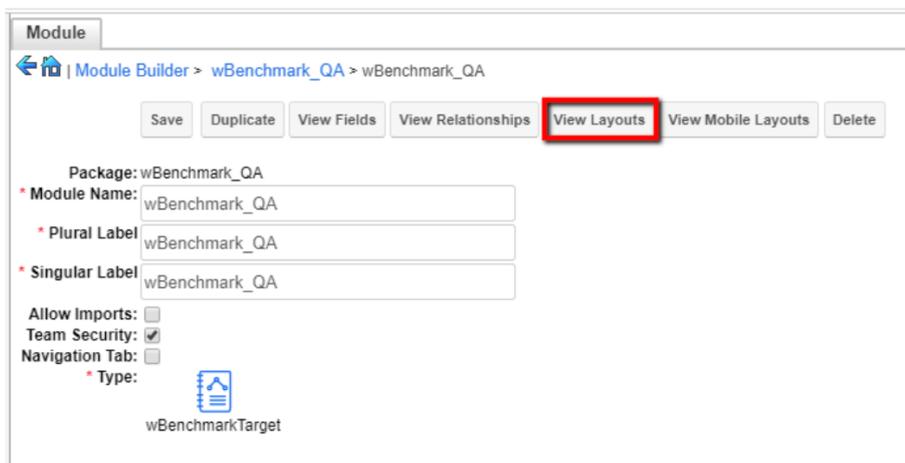
BenchmarkTargetTemplate package is installed on your Sugar instance. **wBenchmarkTarget** modules are not displayed in the Navigation Bar. To access this module types, click on the **Target Module** hyperlink.

After creating the desired modules, users need to navigate to **View Fields** and create destination fields for the calculated Benchmarks.



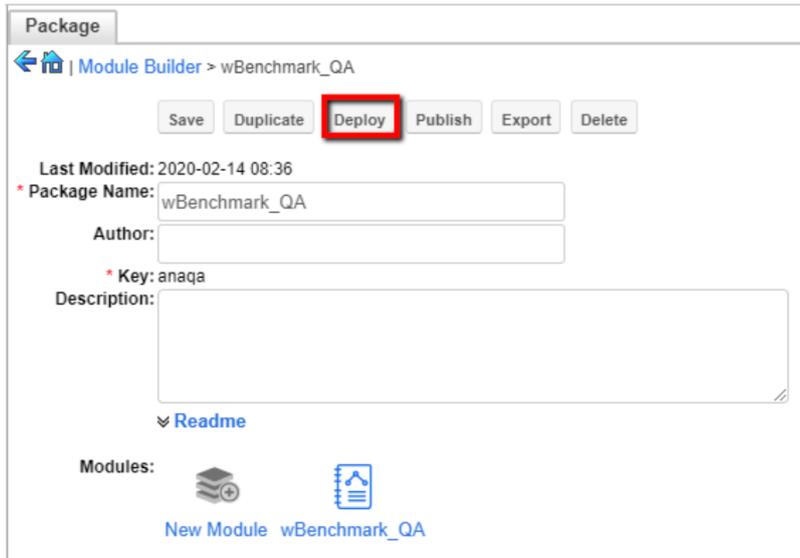
The screenshot shows the SugarCRM Module Builder interface for the 'wBenchmark_QA' module. The breadcrumb trail is 'Module Builder > wBenchmark_QA > wBenchmark_QA'. A toolbar contains buttons for 'Save', 'Duplicate', 'View Fields', 'View Relationships', 'View Layouts', 'View Mobile Layouts', and 'Delete'. The 'View Fields' button is highlighted with a red box. Below the toolbar, the package is 'wBenchmark_QA'. The 'Module Name' is 'wBenchmark_QA', 'Plural Label' is 'wBenchmark_QA', and 'Singular Label' is 'wBenchmark_QA'. There are checkboxes for 'Allow Imports' (unchecked), 'Team Security' (checked), and 'Navigation Tab' (unchecked). The 'Type' is 'wBenchmarkTarget', represented by a blue icon of a document with a checkmark.

Users must configure the fields they create for both **List View** and **Record View**. To manage this, navigate to **View Layouts**.



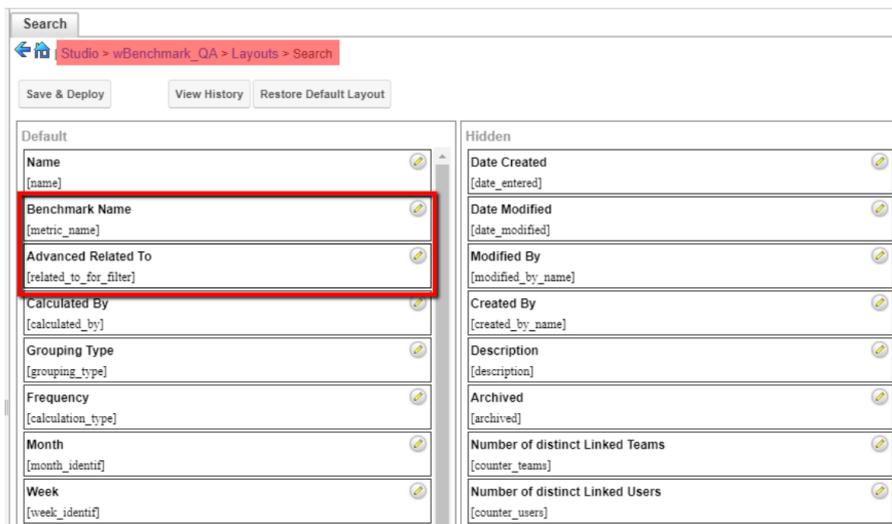
The screenshot shows the SugarCRM Module Builder interface for the 'wBenchmark_QA' module. The breadcrumb trail is 'Module Builder > wBenchmark_QA > wBenchmark_QA'. A toolbar contains buttons for 'Save', 'Duplicate', 'View Fields', 'View Relationships', 'View Layouts', 'View Mobile Layouts', and 'Delete'. The 'View Layouts' button is highlighted with a red box. Below the toolbar, the package is 'wBenchmark_QA'. The 'Module Name' is 'wBenchmark_QA', 'Plural Label' is 'wBenchmark_QA', and 'Singular Label' is 'wBenchmark_QA'. There are checkboxes for 'Allow Imports' (unchecked), 'Team Security' (checked), and 'Navigation Tab' (unchecked). The 'Type' is 'wBenchmarkTarget', represented by a blue icon of a document with a checkmark.

To save your configurations, **Deploy** the package.



Important Note: Please ensure that the Package Name is not equal to "wBenchmark", since this module already exists on your Sugar instance.

Navigate to **Studio > Target Module > Layouts > Search** to add the "**Benchmark Name**" and "**Advanced Related To**" fields to the column.



Save and Deploy your changes.

Using the wBenchmark Module

- [Target Module](#)
- [wBenchmark Buttons](#)
- [Examples of wBenchmark Records](#)

- [Goals](#)
- [wBenchmark Dashlets](#)

Target Module

Target Modules have the following default fields:

Name	Display Label	Type
parent_name	Related To	Parent
calculation_type	Frequency	DropDown
calculated_by	Calculated By	DropDown
grouping_type	Grouping Type	DropDown
period_start_date	Start Date	Date
period_end_date	End Date	Date
week_identif	Week	Integer
month_identif	Month	Integer
quarter_identif	Quarter	Integer
year_identif	Year	Integer
archived	Archived	Checkbox
counter_teams	Number of distinct Linked Teams	Integer
counter_users	Number of distinct Linked Users	Integer
counter_users_total	Number of distinct Linked Users Includ	Integer
grouped_by_label	Grouped By Display Value	Wsys_wm_group_by
name	Name	Name
date_entered	Date Created	Datetime
date_modified	Date Modified	Datetime
description	Description	TextArea
deleted	Deleted	Checkbox

Name: has the format "Benchmark Name - Calculated By #Relate To - Frequency - Start Date".

Calculated by: depending on the Related to Field, this field can be User or Team

Grouped by Display Value: This is a system field that displays the value used when using the Group by Source Field

Grouping Type: This is a dropdown field that displays the definition of the Grouping Type (User / Source Field / User & Source Field)

Related To: this is a hyperlink to the user or team where the benchmark is calculated from.

Frequency: this field can have the values of Daily, Weekly, Monthly, Quarterly, or Yearly, depending on the period for which the benchmark was generated.

Start Date: This field states the start date of the period for which the benchmark is calculated.

End Date: the end date field states the end date of the period for which the benchmark is calculated.

Week: this is a field that attributes a unique week identifier that states the week for which the benchmark was created. **Example:** If Week equals 201810, this means that the benchmark was generated for the 10th week of 2018.

Month: this field's value is a unique month identifier that stands for the month for which the benchmark was calculated. **Example:** if Month equals 201803, the benchmark was generated for the third month (March) of 2018.

Quarter: this is a unique quarter identifier that stands for the quarter for which the benchmark was calculated. **Example:** if the quarter field equals the value 201801, then the benchmark was generated for the first (1) quarter of 2018.

Year: users can identify here the year for which the benchmark was generated.

Number of distinct Linked Teams: this field will display the number of distinct teams linked in the Users subpanel.

Number of distinct Linked Users: this field displays the number of distinct users linked in the Users subpanel.

Number of distinct Linked Users Including from teams: this field displays the number of distinct users linked in the Users subpanel and the members of teams linked in the Teams subpanel.

Three relationships fields will be automatically created as well:

Benchmark Name - this is a hyperlink to the related wBenchmark record.

Previous Benchmark Name - This is a hyperlink to a previously generated Benchmark record with the same **Benchmark Name, Related To, Calculated By, Frequency** filters. This field is populated only if the Benchmark for the previous period exists.

Example: A generated Benchmark for February will have the **Previous Benchmark Name** the generated Benchmark for January.

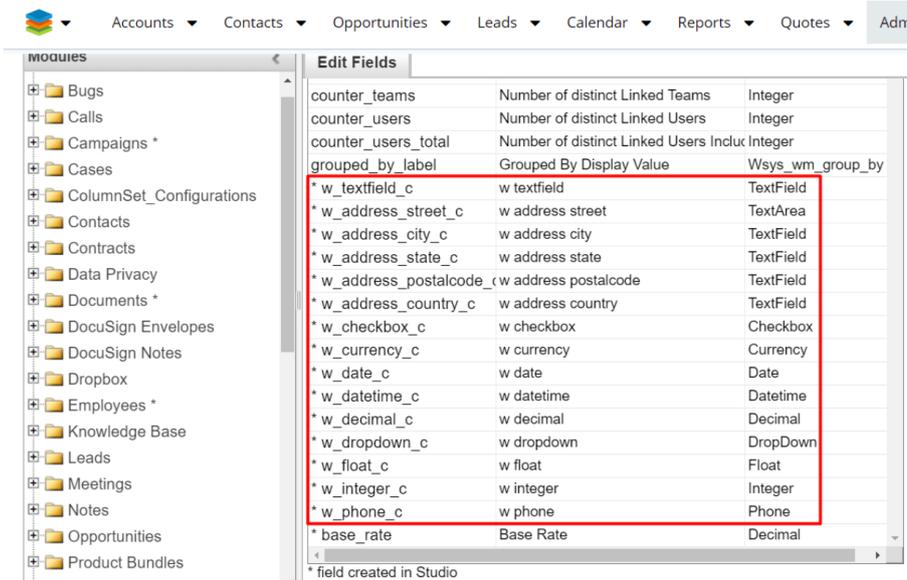
Next Benchmark Name: this is a hyperlink to a to-be-generated Benchmark record with the same **Benchmark Name, Related To, Calculated By, Frequency**. This field is populated when the Benchmark for the next period is generated.

Example: A Benchmark generated for February will have the **Next Benchmark Name** the generated Benchmark for March.

Assigned To - this is the assigned user of the related wBenchmark record.

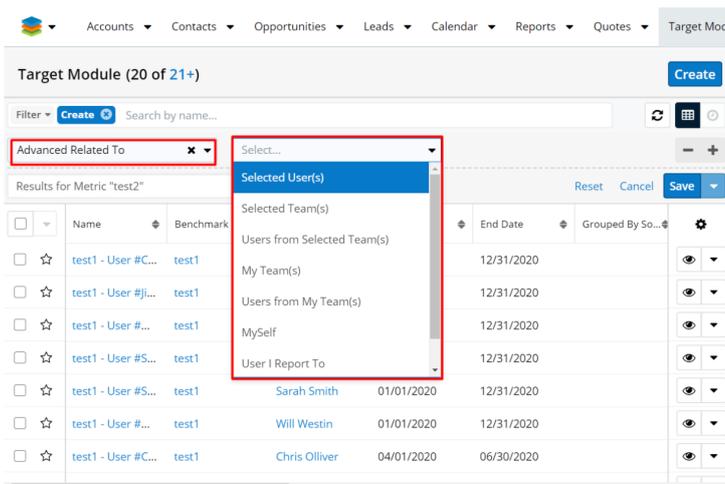
Teams - the value of this field is set to Global for all records. This allows all users to see these records.

All the other fields needed for benchmark calculations must be configured from the **Administration** page, **Studio**, the **Target Module** option.



Custom Target Module Filter

The custom field '**Advanced Related To**' is available for **Targets Modules** in the **Search** dropdown menu.



If a filter is created for '**Advanced Related To**' the following operators are available:

- **Selected User(s)** - Displays only the records related to the selected user(s)
- **Selected Team(s)** - Displays only the records related to the selected team(s)
- **Users from Selected Team(s)** - Displays only the records related to the users from the selected team(s)
- **MySelf** - Displays only the records related to the current user
- **My Team(s)** - Displays only the records related to the teams where the current user is a member
- **Users from My Team(s)** - Displays only the records related to users from the teams where the current user is a member
- **User I Report To** - Displays only the records related to the user which current user reports to
- **Users That Report To Me** - Displays only the records related to users that report to current user

Note: For existing Target Modules the field must be made visible from Studio > Target Module > Layouts > Search.

wBenchmark Record

A wBenchmark record contains the following tabs and fields:

The screenshot shows the configuration for a wBenchmark record. At the top, there are navigation tabs: Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, and wBenchmark. Below these is a 'Name' field with the value 'Required' and 'Cancel' and 'Save' buttons. The main configuration area has three tabs: General, Definitions, and Retention. Under the 'General' tab, there are several settings:

- Automatic Computation Status:** A dropdown menu set to 'Active' with the subtext 'Enable or Disable Benchmark Computation'.
- Target Module:** A dropdown menu set to 'Required' with the subtext 'Module where the computations will be saved. To create a module, go to Sugar Module Builder and build a new module based on the wBenchmark template.'
- Group By:** A dropdown menu set to 'Users' with the subtext 'Having this option checked should enable the calculation of Global metrics and Team metrics (basically no user filter, per instance metrics and per team metrics)'. A checkbox is checked.
- Module Field:** A checkbox that is unchecked with the subtext 'Having this option checked should allow the user to pick a custom module and a custom field which would become an additional Group By clause.'
- Create metrics for:** Three checkboxes:
 - Users:** Checked. Subtext: 'Calculate a value for each linked user'.
 - Teams:** Unchecked. Subtext: 'Calculate a total value for each linked team'.
 - System/Global:** Unchecked. Subtext: 'Calculate a global / system wide value for each definition'.

General Tab

Benchmark Name is a required field that displays the name of the benchmark

Target Module: Help text: Module where the computations will be saved.

To create a module, go to **Sugar Module Builder** and build a new module based

on the wBenchmark template.

The screenshot shows the SugarCRM interface for editing a wBenchmark record. The top navigation bar includes 'Accounts', 'Contacts', 'Opportunities', 'Leads', 'Calendar', 'Reports', 'Quotes', and 'wBenchmark'. The record name is 'Required'. The 'General' tab is active. The 'Automatic Computation Status' is set to 'Active'. The 'Target Module' dropdown is set to 'Required'. The 'Group By' section has 'Users' checked. The 'Create metrics for' section has 'Users' checked, 'Teams' unchecked, and 'System/Global' unchecked.

The **Target Module** dropdown field displays the modules of type **wBenchmarkTarget** and cannot be changed if a definition was created for the current wBenchmark record.

On an existing wBenchmark record, the Target Module is a hyperlink that will open in a new tab the **Target Module** List View filtered by the current related wBenchmark record.

Note: For the list view of the target module to be correctly filtered, the Benchmark Name field needs to be available on Search.(Studio -> Target Module -> Layout -> Search - Add wBenchmark Name)

Group By:

Users - Having this option checked should enable the calculation of Global metrics and Team metrics (basically no user filter, per instance metrics and per team metrics). This field is checked by default.

The screenshot shows the 'wBenchmark' configuration page. The 'Name' field is set to 'Required'. Under the 'General' tab, the 'Automatic Computation Status' is 'Active'. The 'Target Module' is 'Required'. The 'Group By Users' checkbox is checked and highlighted with a red box. Below it, there are three options for 'Create metrics for': 'Users' (checked), 'Teams', and 'System/Global'.

Module Field - Having this option checked should allow the user to pick a custom module and a custom field which would become an additional **Group By** clause.

This screenshot shows the 'wBenchmark' configuration page with the 'Module Field' checkbox checked and highlighted with a red box. The 'Group By Users' checkbox is also checked. The 'Group By Module' dropdown is set to 'Required'. The 'Group By Field' dropdown is set to 'Nothing selected'.

When this option is selected the two other fields are available:

Group By Module - this option requires the creation of a dropdown field that displays all the Modules available.

Group By Field - Group by Source Field

Create Metrics For - The following options are available only if the **Group By User** option is checked:

Users - checked by default, then Benchmarks will be generated for each user from the Users subpanel and for each user from the linked teams in the Teams subpanel

Teams - not checked by default, then Benchmarks will be generated for each user from the Users subpanel and for each user from the linked teams in the Teams subpanel. If a user is linked in the Users subpanel but he is also a member of a linked team, only a Benchmark record will be generated for him.

If Checked, then Benchmarks will be generated for each team selected in the Teams subpanel and for each user from the Users subpanel and for each user from the linked teams in the Teams subpanel.

System/Global - The calculations are global and are ignoring the users and teams assigned to the Source module records.

Calculate For

Day - checked by default; a record will be created per day with the values computed based on the Benchmark Definitions defined on the wBenchmark record. A daily record will not be created and the "**Delete daily Benchmarks older than X days**" option is not available.

Week - checked by default; a record will be created at the beginning of the week with the values computed based on the Benchmark Definitions defined on the wBenchmark record. The calculated values will be updated each time the job will run on that week and only a weekly record will be created for a week.

Month - checked by default; a record will be created at the beginning of the month with the values computed based on the **Benchmark Definitions** defined on the **wBenchmark record** . The calculated values will be updated each time the job will run on that month and only a monthly record will be created for a month.

Quarter - checked by default; a record will be created at the beginning of each quarter based on each **Benchmark Definition** defined on the **wBenchmark record** . The calculated values will be updated each time the job will run on that quarter and only a quarterly record will be created for a quarter.**Year** - checked by default; a record will be created at the beginning of the year with the values computed based on the **Benchmark Definitions** defined on the **wBenchmark record**. The calculated values will be updated each time the job will run on that year and only a yearly record will be created for a year.

Retention Tab:

Old records can be deleted by the benchmark job using the configurations defined in the Retention tab:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails wB

Name
Required Cancel Save

General Definitions **Retention**

Delete daily metrics older than X days
365
How many previous days should be kept in addition to the current one

Delete weekly metrics older than X weeks
52
How many previous weeks should be kept in addition to the current one

Delete monthly metrics older than X months
36
How many previous months should be kept in addition to the current one

Delete quarterly metrics older than X quarters
4
How many previous quarters should be kept in addition to the current one

Delete yearly metrics older than X years
3
How many previous years should be kept in addition to the current one

Delete daily metrics older than X days

The user can decide how many previous computed days should be kept in addition to the current one by adding a numeric value to the field "Delete daily Benchmarks older than X days" .

This field is not available if Calculate by Day checkbox is false.

Delete weekly metrics older than X weeks

By adding a numeric value to the "**Delete weekly Benchmarks older than X weeks**" field, the user can decide how many previous weeks should be kept in addition to the current one. The beginning of the week can be configured by an admin user on **Administration - wBenchmark Global Configurations** page.

Note: This field is not available if the Calculate by Week checkbox is unticked.

Delete monthly metrics older than X months

The user can decide how many previous computed months should be kept in addition to the current one by adding a numeric value to the field "**Delete monthly Benchmarks older than X months**". This field is not available if the **Calculate by Month** checkbox is unticked.

Delete quarterly metrics older than X quarters

The user can decide how many previous computed quarters should be kept in

addition to the current one by adding a numeric value to the "**Delete quarterly Benchmarks older than X quarters**" field. This field is not available if the **Calculate by Quarter** checkbox is unticked.

Delete yearly metrics older than X years

The user can decide how many previous computed years should be kept in addition to the current one by adding a numeric value to the field "**Delete yearly Benchmarks older than X years**". This field is not available if the **Calculate by Year** checkbox is unticked.

Benchmark Definition Tab:

The user can create definitions for Benchmarks equal to the number of numeric fields added to the **Target Module**.

The screenshot shows the 'wBenchmark' record editor. The 'Name' field contains 'wBenchmark_Test'. The 'Definitions' tab is active, showing a 'Target Module' of 'TM Target Module' and a 'Source Module' of 'Calls'. A 'Create Definition' button is visible. Below, a definition is listed: 'CALLS [# 1]: Select Destination Field from TM Target Module = Select Operation filtered by My Calls'. The definition details show it is displayed as 'Enter Display Name' and calculated as 'Select Operation' of 'Calls' filtered by 'My Calls', saved on the 'Select Destination Field' field from the 'Target Module'. A 'Display Name' field is also present.

Target Module - The icon and name of the Target Module selected on the General tab will be displayed. On an existing wBenchmark record, the Target Module is a hyperlink that will open in a new tab the Target Module list view filtered by the current related wBenchmark record.

Note: For the list view of the target module to be correctly filtered, the Benchmark Name field needs to be available on Search.

Total Number of Benchmarks Defined - Displays the total number of Benchmarks defined and the maximum number of Benchmarks that can be defined. The maximum number of Benchmarks that can be defined is given by the number of fields available from the target module. This excludes the numeric fields that are calculated.

If the user tries to add more definitions to a wBenchmark record that the number of available fields defined for the target module, an error message will be displayed.

Select Source Module - All modules from the system will be available.

Generate Definition Template For Selected Module: Is a button that start the creation of a new definition. The creation of a new definition is enabled when the record is in edit mode and only if a Target Module was selected.

Definitions - A definition has the following sections:

Definition Header: Displays a summary of that definition

Definition # <number> Displayed as <Display Name> and calculated as <Select Operation> of <Icon of Source Module> <Select Source Module> filtered by <Default Data Filter> *saved on field* <Select Destination Field> from <Icon of Target Module> <Target Module>Definition

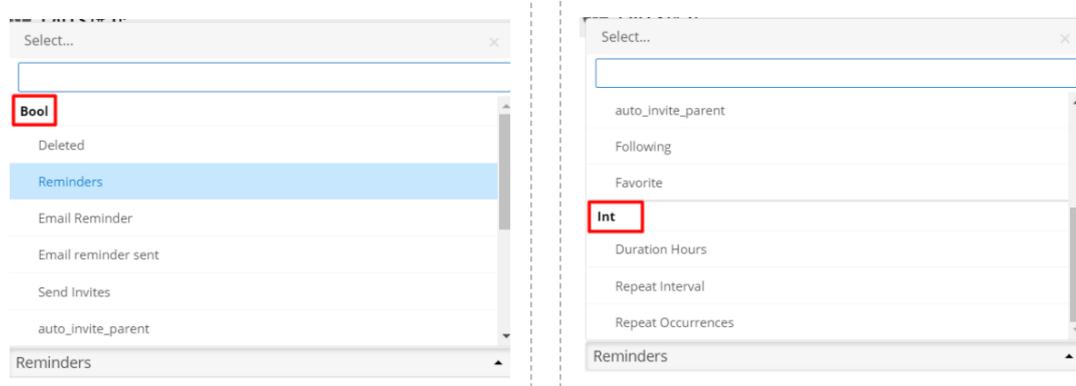
Body:

Display Name: The user can enter a name for the definition.

Select Operation (what operation we should do with source data): A dropdown field that contains the values Sum, Count, Avg, Min, Max, Copy, SQL Calculation representing the operation that will be performed.

Select Source field: the field from where wBenchmark will pull data for benchmark computations.

All fields from the source module, that support the selected operation, are available in this dropdown field. The fields displayed in the dropdown are grouped by type:



The field is visible for **Sum, Avg, Min, Max, Copy, SQL Calculation** operations and is **not visible** for **Count**.

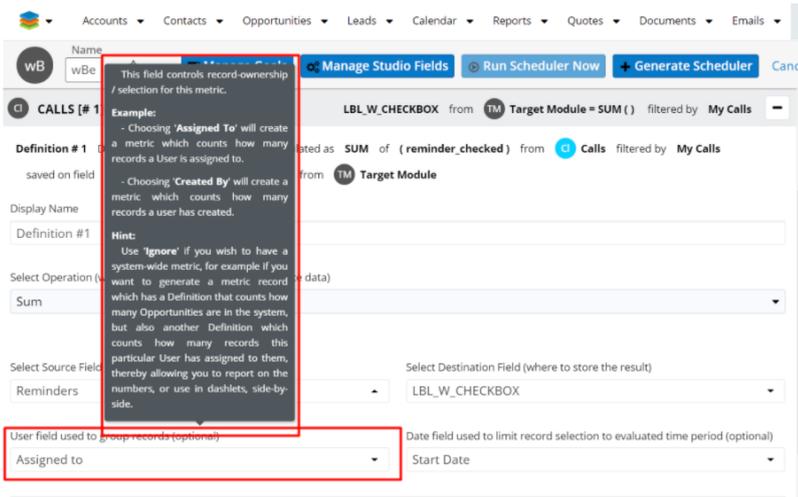
Select Destination Field (where to store the result): All fields from the target module are available in this dropdown field, excluding the calculated fields.

All field types from the Target Module are available in dropdown as it follows, and the operations logic is the next one:

- **SUM** - accept as source field all numeric fields (int, float, decimal, currency) and bool, then store them on numeric or bool fields
- **COUNT** - store in any numerical field
- **AVG** - accept as source field numeric, date, time, datetime, datetimecombo, text, bool and enum + multienum and store on numeric, date, time, datetime, datetimecombo, text, bool and enum + multienum
- **MIN / MAX** - any field type ex accept as source numeric, date, time, datetime, datetimecombo, text, bool and enum + multienum and store on numeric, date, time, datetime, datetimecombo, text, bool and enum + multienum
- **COPY** - accept any field type and store on the same field type
- **SQL Operation** - store in any field type

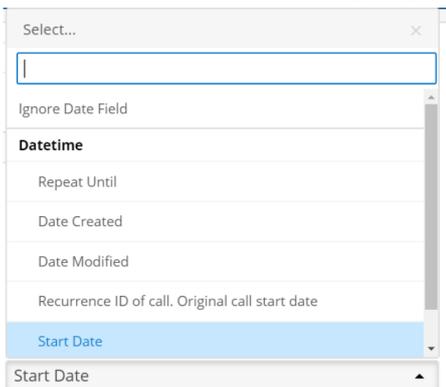
Important Note: Except for the **COPY** operation, for the others, the user is responsible for choosing the correct destination field type. The fields displayed in the dropdown are grouped by type.

Note: A destination field cannot be used for more than one definition for a wBenchmark record. A tooltip is also available for this field:

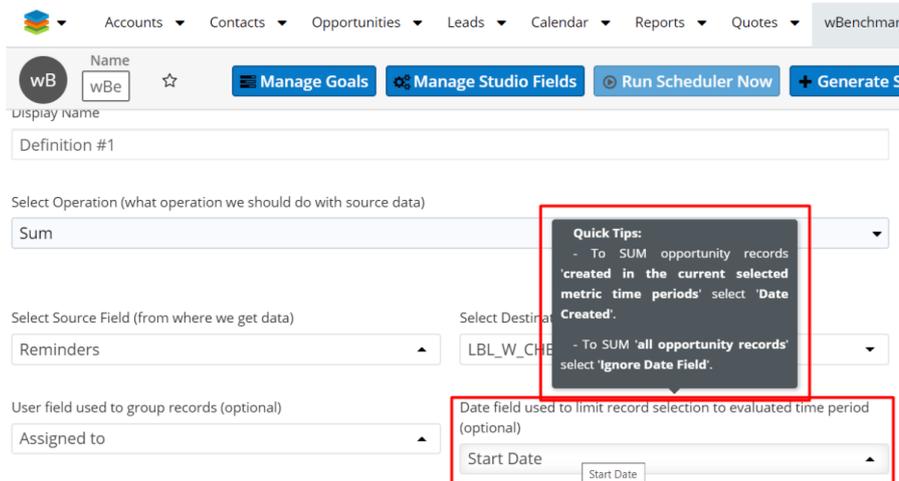


User field used to group records (optional): a dropdown field that contains relationship fields with all users related to the source module records (**Assigned To, Created By, Modified By**). The field has the "Ignore user field" option available to calculate global values in a wBenchmark record with when the "Create metrics for System/Global" value is false. This field is not available in cases when only "Create metrics for System/Global" is true and "Create metrics for Users and Teams" is false.

Date field used to limit record selection to evaluated time period (optional) – this is a dropdown field that contains all date fields from the source module. The fields displayed in the dropdown are grouped by type:

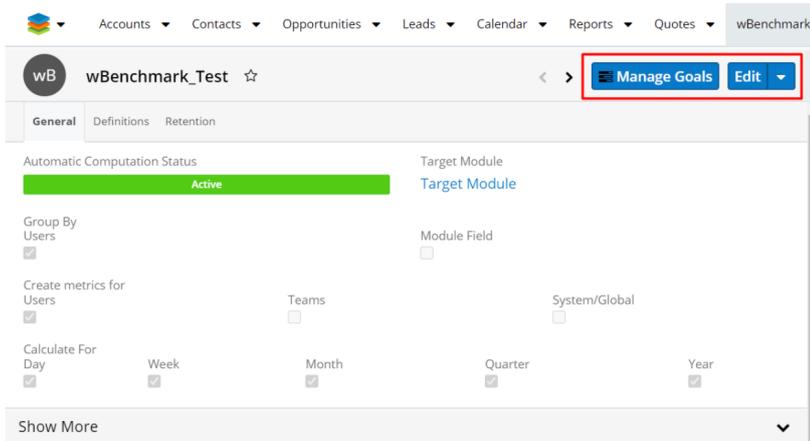


A Tooltip is available for this field:



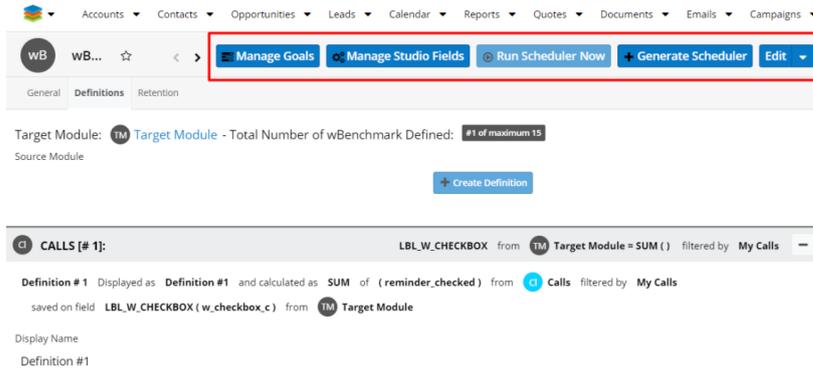
wBenchmark Buttons

On a wBenchmark record, in Record View, are available two custom buttons **Manage Goals** and **Edit** (from the Actions dropdown menu).



Admin users will have the access to more wBenchmark custom buttons:

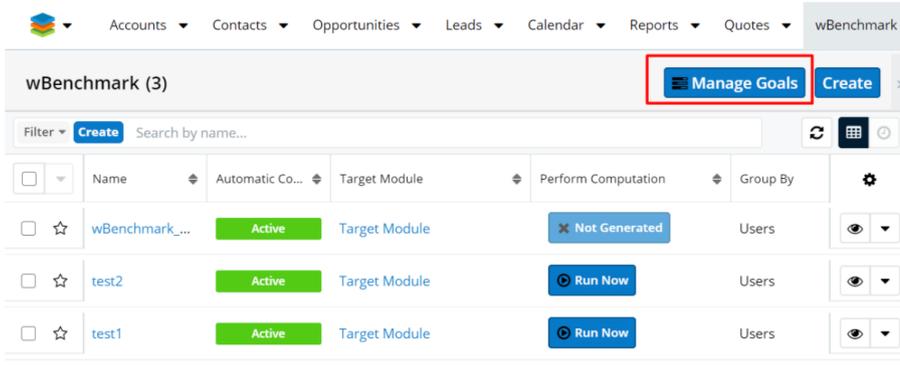
- [Manage Goals](#)
- [Manage Studio Fields](#)
- [Run Scheduler Now](#)
- [Generate Scheduler](#)
- [Configure Scheduler](#)
- [Enable Scheduler](#)
- Edit



Manage Goals

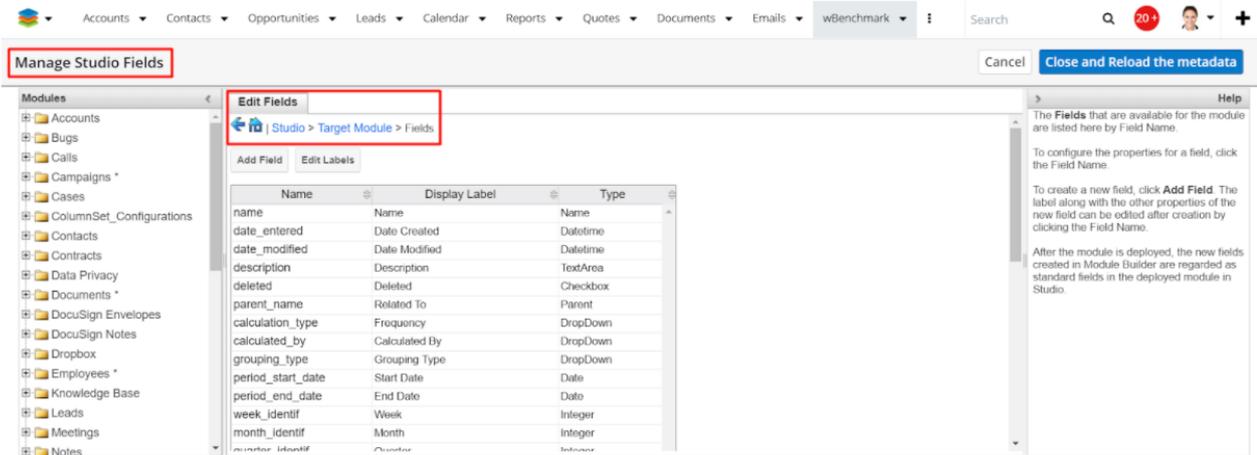
The **Manage Goals** button is available for both admin and regular users. The button redirects users to the **wBenchmark Goal Group** module (#sys_wBenchmarkGoals). (For more details, check the [Creating Goals](#) chapter).

This button is also available on wBenchmark list view, next to the **Create** button.



Manage Studio Fields

This button opens in a drawer the Studio module on the path **Studio -> Target Module -> Fields**.



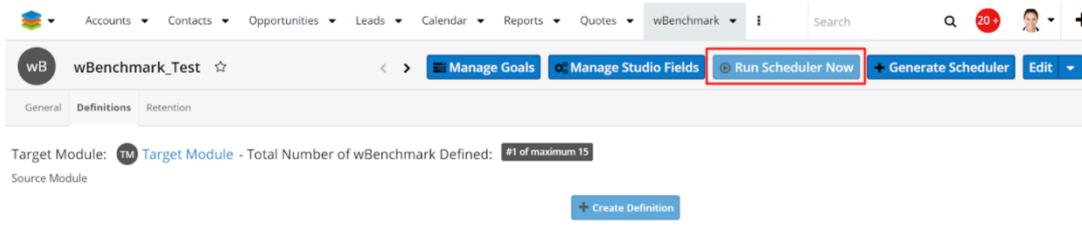
On the opened drawer, the user can add new fields and then press the **Close and Reload the Metadata** button. The wBenchmark record view is reloaded and the Maximum Number of Definitions Available will be increased if any numeric fields were created.

Note: The wBenchmark record should be saved before using the "Manage Studio Fields" button to save and not lose any changes that were made to that record. The "Manage Studio Fields" button can be used when the maximum available definitions has been reached and the user needs more numeric fields on the Target Module.

Run Scheduler Now

The **Run Scheduler Now** button forces the related scheduler job to run for the current date; it is disabled until a scheduled job is generated.

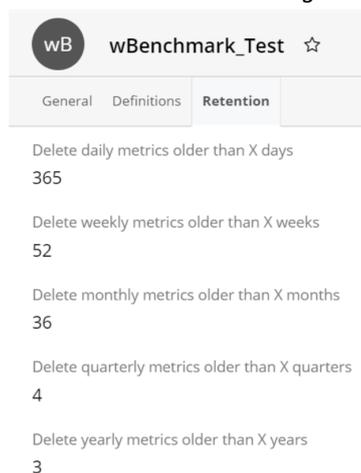
By using this button, the records will be created/updated based on the related wBenchmark, but the old records will not be deleted if the CRON is not set to run automatically.



Generate Scheduler

After a wBenchmark record is created with at least 1 definition, the **Generate Scheduler** button will be displayed next to the **Edit/Save** button on the wBenchmark **Record View** .

The **Generate Scheduler** button creates a scheduler job that will execute the corresponding wBenchmark. When the scheduled job will run, the Benchmark records will be created in the target module based on the corresponding wBenchmark. The job also deletes the records defined in Retention tab:



Note: The wBenchmark record can be updated even if the scheduled job was generated. On the next run the job will take the new configurations.

Configure Scheduler

On a wBenchmark record that has its scheduler job generated, the **Configure Scheduler button** is displayed instead of the "**Generate Scheduler**" button. The Configure Scheduler opens in a new tab of the related scheduler job in **Edit** mode.

Enable Scheduler

If the related scheduler job has the status '**Inactive**' this button will be displayed. The **Enable Scheduler** action opens in a new tab the related scheduler job in **Edit** mode.

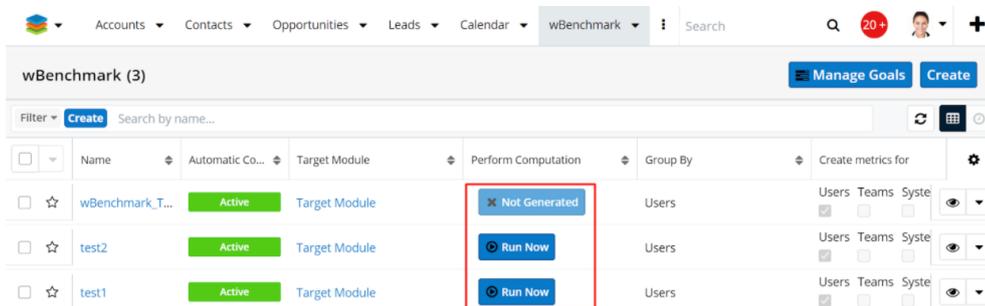
Copy

Using the Copy button will create a new wBenchmark record with the following details copied from the original record:

- General tab fields
- Definitions
- User and Teams

Run Scheduler

The scheduler job can also be executed manually from **wBenchmark List View**, by using the **Run Now** button available on the **Perform Computation** column. If the job is not generated yet, then the button is disabled and **Not Generated** is displayed instead.



Manually run

The generated wBenchmark Scheduled job can be manually run by accessing the following URL:

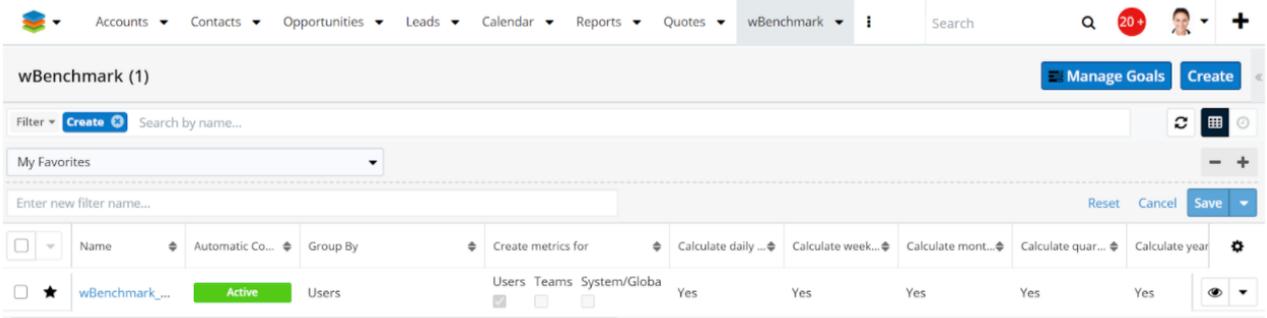
```
<instance_url>/index.php?entryPoint=wMetricCronoEntryPoint&cronoIDS=<ScheduledJobID>&runNow=true&runForDate=<date: format YY-M-D (2018-03-28)>&debugLog=true
```

Examples of Benchmark records

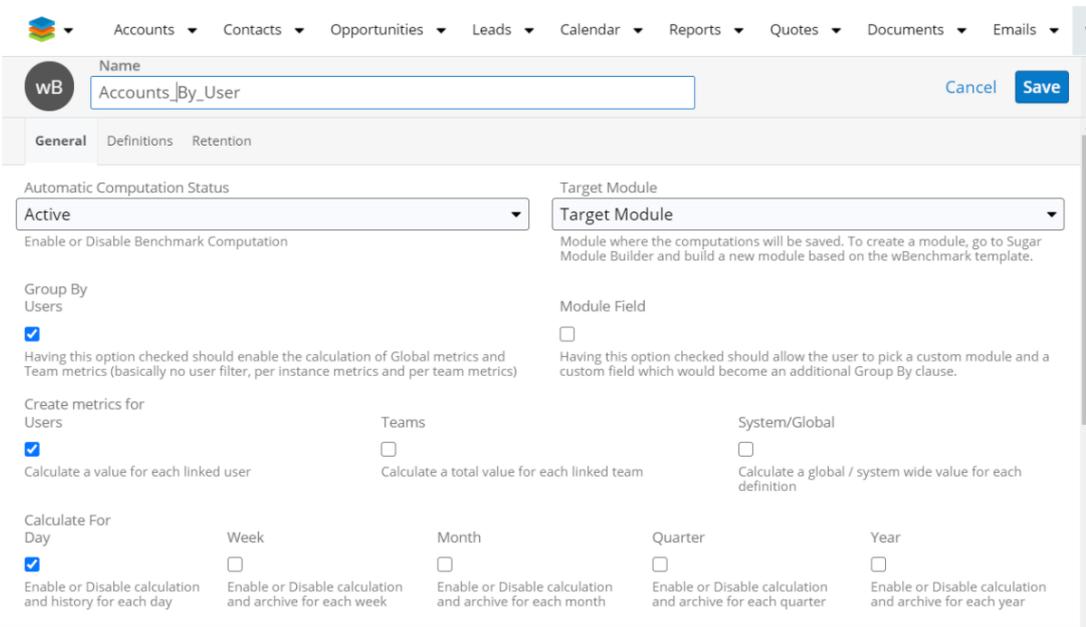
The following benchmarks are created and calculated based on **Grouping Type (Users, Module Field)**, **Calculate Metrics for (Users, Teams, System/Global)** and **Frequency (Day, Week, Month, Quarter, Year)**.

Case 1: Group By Users

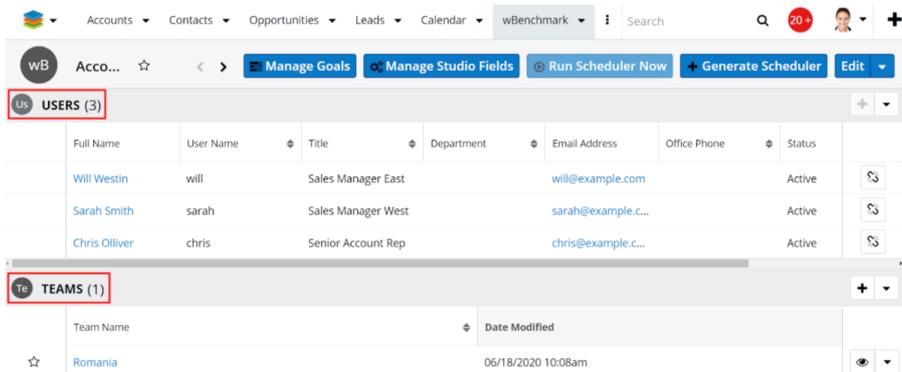
Calculate Metrics for User; Frequency: Day



To use this record type, ensure that you create a new benchmark record and fill in all the fields from the image below.



Ensure to also add the attached users and teams.



Go to the **Definitions** tab and add two definitions as it follows:

Accounts By User

General Definitions Retention

Target Module: **TM Target Module** - Total Number of wBenchmark Defined: **#1 of maximum 16**

Source Module: Accounts **+ Create Definition**

AC ACCOUNTS [# 1]: Proposal Role from **TM Target Module = SQL (Raw SQL)** filtered by **All Accounts**

Definition # 1 Displayed as **SQL Calc** and calculated as **SQL of Raw SQL (Raw SQL)** from **AC Accounts** filtered by **All Accounts** saved on field **Proposal Role (proposal_role_c)** from **TM Target Module**

Display Name: SQL Calc

Select Operation (what operation we should do with source data): SQL Calculation

Raw SQL Operation: 'Proposal: Assigned To User'

Select Destination Field (where to store the result): Proposal Role

User field used to group records (optional): Assigned to

Date field used to limit record selection to evaluated time period (optional): Ignore Date Field

Filter **Create** Search by name...

Go to the **Retention** tab and set the **Delete Daily Metrics** option to a value higher than $X \text{ days} = 1$:

Accounts

WB Accou... **Manage Goals**

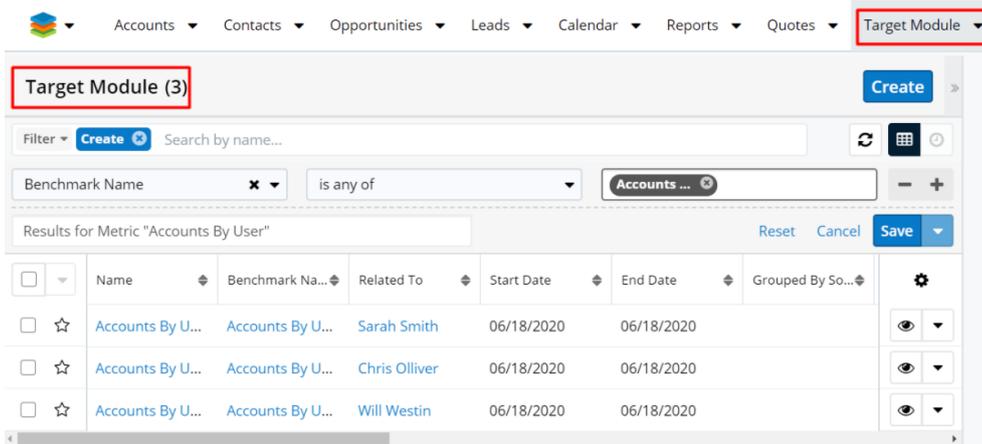
General Definitions **Retention**

Delete daily metrics older than X days

1

How many previous days should be kept in addition to the current one

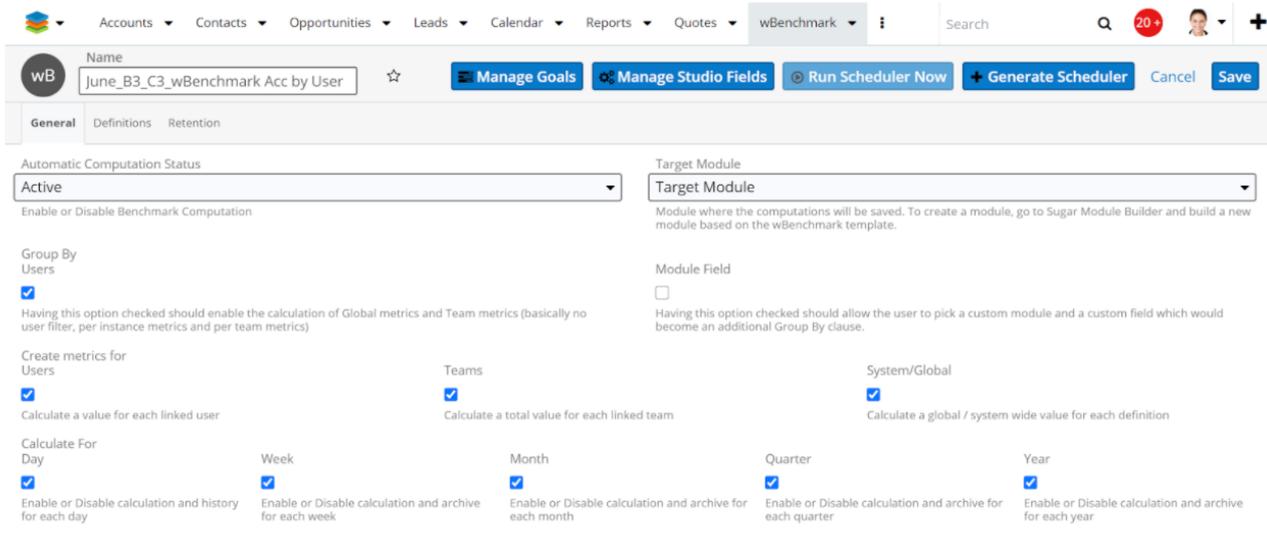
Save the benchmark record, **Generate Scheduler Job, Configure** and **Run Scheduler Now**. Go to the **Target Module** and see that the following computations are generated:



The benchmark computations are calculated only for linked Users, Users form linked Team and for the day when the computation was performed.

Calculate metrics for: User, Teams and System/Global; Frequency: Day, Week, Month, Quarter, Year

Create a new benchmark record and fill in all the fields from the following image. Ensure to also add the attached users and teams.



Ensure to also add the attached **Users** and **Teams**.

Accounts Contacts Opportunities Leads Calendar wBenchmark Search 20+

Name June_B: Manage Goals Manage Studio Fields Run Scheduler Now Generate Scheduler Cancel Save

Us USERS (3)

Full Name	User Name	Title	Department	Email Address	Office Phone	Status
Will Westin	will	Sales Manager East		will@example.com		Active
Sarah Smith	sarah	Sales Manager West		sarah@example.c...		Active
Chris Olliver	chris	Senior Account Rep		chris@example.c...		Active

Te TEAMS (1)

Team Name	Date Modified
Romania	06/18/2020 10:08am

Go to the **Definitions** tab and add three definitions as follows:

Accounts Contacts Opportunities Leads Calendar Reports Quotes wBenchmark Search 20+

Name June_E: Manage Goals Manage Studio Fields Run Scheduler Now Generate Scheduler Cancel Save

Ac ACCOUNTS (# 1): LBL_W_INTEGER from Target Module = COUNT filtered by All Accounts

Definition # 1 Displayed as **No of Accounts** and calculated as **COUNT** of Accounts filtered by All Accounts saved on field **LBL_W_INTEGER (w_integer_c)** from Target Module

Display Name: No of Accounts

Select Operation (what operation we should do with source data): Count

Select Destination Field (where to store the result): LBL_W_INTEGER

User field used to group records (optional): Assigned to

Date field used to limit record selection to evaluated time period (optional): Ignore Date Field

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails wBenchmark Search 20+

Name June_B3_C3_wBenchmark Acc by User: Manage Goals Manage Studio Fields Run Scheduler Now Generate Scheduler Cancel Save

Ac ACCOUNTS (# 2): Users from Target Module = COPY (Assigned to) filtered by All Accounts

Definition # 2 Displayed as **Copy Users** and calculated as **COPY** of Assigned to (assigned_user_name) from Accounts filtered by All Accounts saved on field **Users (users_c)** from Target Module

Display Name: Copy Users

Select Operation (what operation we should do with source data): Copy

Select Source Field (from where we get data): Assigned to

Select Destination Field (where to store the result): Nothing selected

User field used to group records (optional): Assigned to

Date field used to limit record selection to evaluated time period (optional): Ignore Date Field

Filter Create Search by name...

Accounts Contacts Opportunities Leads Calendar Reports Quotes wBenchmark Search 20+

Name: June_B3_C3_wBenchmark Acc by User

Manage Goals Manage Studio Fields Run Scheduler Now Generate Scheduler Cancel Save

ACCOUNTS [# 3]: LBL_W_DATETIME from Target Module = MIN (Date Created) filtered by My Accounts

Definition # 3 Displayed as **First Acc Created** and calculated as **MIN** of **Date Created (date_entered)** from Accounts filtered by **My Accounts**
 saved on field **LBL_W_DATETIME (w_datetime_c)** from **Target Module**

Display Name: First Acc Created

Select Operation (what operation we should do with source data): Min

Select Source Field (from where we get data): Date Created

Select Destination Field (where to store the result): LBL_W_DATETIME

User field used to group records (optional): Assigned to

Date field used to limit record selection to evaluated time period (optional): Ignore Date Field

Save the benchmark record, Generate Scheduler Job, Configure and Runs Scheduler Now. Go to **Target Module** and see that the following computations are generated.

Accounts Contacts Opportunities Leads Target Module

Target Module (20) Create

Filter Create Search by name...

Benchmark Name is any of June_B3_C3...

Results for Metric "June_B3_C3_wBenchmark Acc by U" Reset Cancel Save

Name	Benchmark Na...	Related To	Start Date	End Date
June_B3_C3_w...	June_B3_C3_w...		01/01/2020	12/31/2020
June_B3_C3_w...	June_B3_C3_w...		04/01/2020	06/30/2020
June_B3_C3_w...	June_B3_C3_w...		06/01/2020	06/30/2020
June_B3_C3_w...	June_B3_C3_w...		06/16/2020	06/22/2020
June_B3_C3_w...	June_B3_C3_w...		06/18/2020	06/18/2020

User Daily Computations:

The benchmark computations are calculated for the linked **Users**, **Users form the linked Team**, and for the **Day** when the computation was performed.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Target Module

Target Module (3) [Create](#)

Filter [Create](#) Search by name...

Benchmark Name is any of

Calculated By is any of

Frequency is any of

Results for Metric "June_B3_C3_wBenchmark Acc by User" [Reset](#) [Cancel](#) [Save](#)

<input type="checkbox"/>	Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...	
<input type="checkbox"/>	June_B3_C3_w...	June_B3_C3_w...	Chris Olliver	06/18/2020	06/18/2020		<input type="checkbox"/>
<input type="checkbox"/>	June_B3_C3_w...	June_B3_C3_w...	Sarah Smith	06/18/2020	06/18/2020		<input type="checkbox"/>
<input type="checkbox"/>	June_B3_C3_w...	June_B3_C3_w...	Will Westin	06/18/2020	06/18/2020		<input type="checkbox"/>

User Weekly Computations:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Target Module

Target Module (3) [Create](#)

Filter [Create](#) Search by name...

Benchmark Name is any of

Calculated By is any of

Frequency is any of

Results for Metric "June_B3_C3_wBenchmark Acc by User" [Reset](#) [Cancel](#) [Save](#)

<input type="checkbox"/>	Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...	
<input type="checkbox"/>	June_B3_C3_w...	June_B3_C3_w...	Chris Olliver	06/16/2020	06/22/2020		<input type="checkbox"/>
<input type="checkbox"/>	June_B3_C3_w...	June_B3_C3_w...	Sarah Smith	06/16/2020	06/22/2020		<input type="checkbox"/>
<input type="checkbox"/>	June_B3_C3_w...	June_B3_C3_w...	Will Westin	06/16/2020	06/22/2020		<input type="checkbox"/>

User Monthly Computations:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Target Module

Target Module (3) [Create](#)

Filter [Create](#) Search by name...

Benchmark Name is any of

Calculated By is any of

Frequency is any of

Results for Metric "June_B3_C3_wBenchmark Acc by User" [Reset](#) [Cancel](#) [Save](#)

<input type="checkbox"/>	Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...	
<input type="checkbox"/>	June_B3_C3_w...	June_B3_C3_w...	Chris Olliver	06/01/2020	06/30/2020		<input type="checkbox"/>
<input type="checkbox"/>	June_B3_C3_w...	June_B3_C3_w...	Sarah Smith	06/01/2020	06/30/2020		<input type="checkbox"/>
<input type="checkbox"/>	June_B3_C3_w...	June_B3_C3_w...	Will Westin	06/01/2020	06/30/2020		<input type="checkbox"/>

The benchmark computations are calculated for linked the **Users** , **Users form the linked Team**, and for the **Month** when the computation was performed.

User Quarterly Computations

The screenshot shows the Salesforce Target Module interface. At the top, there are navigation tabs: Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, and Target Module. Below this, there's a 'Target Module (3)' header with a 'Create' button. A filter section includes a search box and a 'Create' button. The main configuration area has three rows: 'Benchmark Name' set to 'June_B3_C3...', 'Calculated By' set to 'User', and 'Frequency' set to 'Quarterly' (highlighted with a red box). Below the configuration, there's a table of results for the metric 'June_B3_C3_wBenchmark Acc by User'. The table has columns for Name, Benchmark Name, Related To, Start Date, and End Date. Three rows are shown, each associated with a user: Chris Olliver, Sarah Smith, and Will Westin, all with a start date of 04/01/2020 and an end date of 06/30/2020.

The benchmark computations are calculated for the linked **Users**, **Users form the linked Team**, and for the **Quarter** when the computation was performed.

User Yearly Computations

The screenshot shows the Salesforce Target Module interface, similar to the previous one. The 'Frequency' dropdown is now set to 'Yearly' (highlighted with a red box). The table of results for the metric 'June_B3_C3_wBenchmark Acc by User' shows three rows for the same users: Chris Olliver, Sarah Smith, and Will Westin. The start date for all is 01/01/2020 and the end date is 12/31/2020, indicating a yearly calculation period.

The benchmark computations are calculated for the linked Users, Users form the linked Team and for the year when the computation was performed.

Team Daily, Weekly, Monthly, Quarterly and Yearly Computations

The benchmark computations are calculated also for the linked Team, as a whole,

and for the day, week, month, quarter, year when the computation was performed.

System/Global Daily Computations

The screenshot shows the 'Target Module (1)' configuration interface. The 'Frequency' field is highlighted with a red box and set to 'Daily'. The 'Benchmark Name' is 'June_B3_C3...' and 'Calculated By' is 'Global'. Below the configuration, a table shows results for the metric 'June_B3_C3_wBenchmark Acc by User'.

Name	Benchmark N...	Related To	Start Date	End Date	Grouped By So...
June_B3_C3_w...	June_B3_C3_w...		06/18/2020	06/18/2020	

The benchmark computations are also calculated for **System/Global**, for the **Day, Week, Month, Quarter, or Year** when the computation was performed.

The screenshot shows the 'Target Module (5)' configuration interface. The 'Frequency' field is highlighted with a red box and has multiple options: 'Daily', 'Weekly', 'Monthly', 'Quarterly', and 'Yearly'. The 'Benchmark Name' is 'June_B3_C3...' and 'Calculated By' is 'Global'. Below the configuration, a table shows results for the metric 'June_B3_C3_wBenchmark Acc by User'.

Name	Benchmark N...	Related To	Start Date	End Date	Grouped By So...
June_B3_C3_w...	June_B3_C3_w...		06/18/2020	06/18/2020	
June_B3_C3_w...	June_B3_C3_w...		06/16/2020	06/22/2020	
June_B3_C3_w...	June_B3_C3_w...		06/01/2020	06/30/2020	
June_B3_C3_w...	June_B3_C3_w...		04/01/2020	06/30/2020	

Case 2: Group by Module Field

Create a new benchmark record and fill in all the fields from the following image. Also ensure that the Users/Teams subpanels are NOT available.

Accounts Contacts Opportunities Leads Calendar Reports Quotes wBenchmark Search 20+

Name: June_C9_B9_Invoice_Calculations_Grou

Manage Goals Manage Studio Fields Run Scheduler Now Generate Scheduler Cancel Save

General Definitions Retention

Automatic Computation Status: Active
Enable or Disable Benchmark Computation

Group By Users:
Having this option checked should enable the calculation of Global metrics and Team metrics (basically no user filter, per instance metrics and per team metrics)

Group By Module: Opportunities
Group by Source Module

Calculate For Day:
Enable or Disable calculation and history for each day

Week:
Enable or Disable calculation and archive for each week

Month:
Enable or Disable calculation and archive for each month

Quarter:
Enable or Disable calculation and archive for each quarter

Year:
Enable or Disable calculation and archive for each year

Target Module: Target Module
Module where the computations will be saved. To create a module, go to Sugar Module Builder and build a new module based on the wBenchmark template.

Module Field:
Having this option checked should allow the user to pick a custom module and a custom field which would become an additional Group By clause.

Group By Field: Sales Stage
Group by Source Field

Go to the **Definitions** tab and add two definitions as follows:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails

Name: June

Manage Goals Manage Studio Fields Run Scheduler Now Configure Scheduler Cancel

Op OPPORTUNITIES [# 1]: Invoice Min from TM Target Module = MIN (Likely) filtered by All Opportunities

Definition # 1 Displayed as **Minimum Invoice** and calculated as **MIN** of **Likely (amount)** from **Op Opportunities**
 filtered by **All Opportunities** saved on field **Invoice Min (invoice_min_c)** from **TM Target Module**

Display Name: Minimum Invoice

Select Operation (what operation we should do with source data): Min

Select Source Field (from where we get data): Likely

Select Destination Field (where to store the result): Invoice Min

Date field used to limit record selection to evaluated time period (optional): Ignore Date Field

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails

WB Name June Manage Goals Manage Studio Fields Run Scheduler Now Configure Scheduler

Op OPPORTUNITIES [# 2]: Invoice Max from TM Target Module = MAX (Likely) filtered by All Opportunities

Definition # 2 Displayed as Maximum Invoice and calculated as MAX of Likely (amount) from Op Opportunities filtered by All Opportunities saved on field Invoice Max (invoice_max_c) from TM Target Module

Display Name
Maximum Invoice

Select Operation (what operation we should do with source data)
Max

Select Source Field (from where we get data) Select Destination Field (where to store the result)
Likely Invoice Max

Date field used to limit record selection to evaluated time period (optional)
Ignore Date Field

Filter Create Search by opportunity name...

Save the benchmark record, Generate Scheduler Job, Configure and Run Scheduler Now. Go to Target Module and see that the following computations are generated.

Monthly Computations Grouped by Module Field for the Sales Stage

Accounts Contacts Opportunities Leads Calendar Reports Quotes Target Module

Target Module (10) Create

Filter Create Search by name...

Benchmark Name is any of June_C9_B9_In...
Frequency is any of Monthly

Results for Metric "June_C9_B9_Invoice_Calculations_Grouped_by" Reset Cancel Save

Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...
June_C9_B9_In...	June_C9_B9_In...		06/01/2020	06/30/2020	Value Propositi...
June_C9_B9_In...	June_C9_B9_In...		06/01/2020	06/30/2020	Qualification
June_C9_B9_In...	June_C9_B9_In...		06/01/2020	06/30/2020	Prospecting
June_C9_B9_In...	June_C9_B9_In...		06/01/2020	06/30/2020	Proposal/Price ...
June_C9_B9_In...	June_C9_B9_In...		06/01/2020	06/30/2020	Perception Ana...
June_C9_B9_In...	June_C9_B9_In...		06/01/2020	06/30/2020	Negotiation/Re...

The benchmark computations are calculated for each value of the selected **Module Field** , for the **Month** when the computation was performed.

Yearly Computations Grouped by Module Field for the Sales Stage

The screenshot shows the 'Target Module' interface. At the top, there is a navigation bar with 'Target Module' highlighted. Below it, the title 'Target Module (10)' is displayed. A filter section contains two criteria: 'Benchmark Name' with the value 'June_C9_B9...' and 'Frequency' with the value 'Yearly'. Below the filters, a table shows results for the metric 'June_C9_B9_Invoice_Calculations_Grouped_by'. The table has columns for Name, Benchmark Name, Related To, Start Date, End Date, and Grouped By So... The results are grouped by 'Value Proposition', 'Qualification', 'Prospecting', 'Proposal/Price...', 'Perception Ana...', and 'Negotiation/Re...'.

Name	Benchmark Name	Related To	Start Date	End Date	Grouped By So...
June_C9_B9_In...	June_C9_B9_In...		01/01/2020	12/31/2020	Value Proposi...
June_C9_B9_In...	June_C9_B9_In...		01/01/2020	12/31/2020	Qualification
June_C9_B9_In...	June_C9_B9_In...		01/01/2020	12/31/2020	Prospecting
June_C9_B9_In...	June_C9_B9_In...		01/01/2020	12/31/2020	Proposal/Price ...
June_C9_B9_In...	June_C9_B9_In...		01/01/2020	12/31/2020	Perception Ana...
June_C9_B9_In...	June_C9_B9_In...		01/01/2020	12/31/2020	Negotiation/Re...

The benchmark computations are calculated for each value of the selected **Module Field** and for the **Year** when the computation was performed.

Case 3: Group by Users and Module Field

1. Calculate metrics for: Users

Module Field: Sales Stage

Frequency: Month, Year

Create a new benchmark record and fill all the fields from the following image.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails Campaigns

Name: June_B11_C11_Invoice_Calculations_Grouped_by_User [Cancel] [Save]

General Definitions Retention

Automatic Computation Status: Active
Enable or Disable Benchmark Computation

Target Module: Target Module
Module where the computations will be saved. To create a module, go to Sugar Module Builder and build a new module based on the wBenchmark template.

Group By Users:
Having this option checked should enable the calculation of Global metrics and Team metrics (basically no user filter, per instance metrics and per team metrics)

Module Field:
Having this option checked should allow the user to pick a custom module and a custom field which would become an additional Group By clause.

Group By Module: Opportunities
Group by Source Module

Group By Field: Sales Stage
Group by Source Field

Create metrics for Users:
Calculate a value for each linked user

Teams:
Calculate a total value for each linked team

System/Global:
Calculate a global / system wide value for each definition

Calculate For: Day Week Month Quarter Year
Enable or Disable calculation and history for each day Enable or Disable calculation and archive for each week Enable or Disable calculation and archive for each month Enable or Disable calculation and archive for each quarter Enable or Disable calculation and archive for each year

Ensure that the **Users** and **Teams** subpanels are available and will be filled with the attached details.

Accounts Contacts Opportunities Leads Calendar wBenchmark

Name: June [Manage Goals] [Manage Studio Fields] [Run Scheduler N]

Us **USERS (3)** + -

Full Name	User Name	Title	Department
Will Westin	will	Sales Manager East	
Sarah Smith	sarah	Sales Manager West	
Chris Olliver	chris	Senior Account Rep	

Te **TEAMS (1)** + -

Team Name	Date Modified
West	04/07/2020 04:50pm

Go to the **Definitions** tab and add two definitions as follows:

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Documents ▾ Emails ▾

WB Name June ☆ [Manage Goals](#) [Manage Studio Fields](#) [Run Scheduler Now](#) [Generate Scheduler](#) Cancel

Op OPPORTUNITIES [# 1]: Invoice Max from TM Target Module = MAX (Likely) filtered by All Opportunities

Definition # 1 Displayed as Maximum Invoice and calculated as MAX of Likely (amount) from Op Opportunities
 filtered by All Opportunities saved on field Invoice Max (invoice_max_c) from TM Target Module

Display Name

Select Operation (what operation we should do with source data)

Select Source Field (from where we get data) Select Destination Field (where to store the result)

User field used to group records (optional) Date field used to limit record selection to evaluated time period (optional)

Filter [Create](#) Search by opportunity name...

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Documents ▾ Emails ▾

WB Name June ☆ [Manage Goals](#) [Manage Studio Fields](#) [Run Scheduler Now](#) [Generate Scheduler](#) Cancel

Op OPPORTUNITIES [# 2]: Invoice Avg from TM Target Module = AVG (Likely) filtered by All Opportunities

Definition # 2 Displayed as Meium Invoice and calculated as AVG of Likely (amount) from Op Opportunities
 filtered by All Opportunities saved on field Invoice Avg (invoice_avg_c) from TM Target Module

Display Name

Select Operation (what operation we should do with source data)

Select Source Field (from where we get data) Select Destination Field (where to store the result)

User field used to group records (optional) Date field used to limit record selection to evaluated time period (optional)

Filter [Create](#) Search by opportunity name...

Save the benchmark record, Generate Scheduler Job, Configure and Runs Scheduler Now. Go to Target Module and see that the following computations are generated.

Monthly computations **Grouped by User = Sally Bronsen** and module field **Sales Stage:**

Accounts Contacts Opportunities Leads Calendar Reports Quotes Target Module

Target Module (9) Create

Filter Create Search by name...

Benchmark Name is any of June_B11_C11_...
 Frequency is any of Monthly
 Advanced Related To Selected User(s) Sally Brons...

Results for Metric "June_B11_C11_Invoice_Calculations_Grouped_1" Reset Cancel Save

Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...
June_B11_C11_...	June_B11_C11_...	Sally Bronsen	06/01/2020	06/30/2020	Value Propositi...
June_B11_C11_...	June_B11_C11_...	Sally Bronsen	06/01/2020	06/30/2020	Qualification
June_B11_C11_...	June_B11_C11_...	Sally Bronsen	06/01/2020	06/30/2020	Prospecting
June_B11_C11_...	June_B11_C11_...	Sally Bronsen	06/01/2020	06/30/2020	Proposal/Price ...
June_B11_C11_...	June_B11_C11_...	Sally Bronsen	06/01/2020	06/30/2020	Perception Ana...

Yearly computations **Grouped by User = Sally Bronsen** and module field **Sales Stage**:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Target Module

Target Module (9) Create

Filter Create Search by name...

Benchmark Name is any of June_B11_C11_...
 Frequency is any of Yearly
 Advanced Related To Selected User(s) Sally Brons...

Results for Metric "June_B11_C11_Invoice_Calculations_Grouped_1" Reset Cancel Save

Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...
June_B11_C11_...	June_B11_C11_...	Sally Bronsen	01/01/2020	12/31/2020	Value Propositi...
June_B11_C11_...	June_B11_C11_...	Sally Bronsen	01/01/2020	12/31/2020	Qualification
June_B11_C11_...	June_B11_C11_...	Sally Bronsen	01/01/2020	12/31/2020	Prospecting
June_B11_C11_...	June_B11_C11_...	Sally Bronsen	01/01/2020	12/31/2020	Proposal/Price ...
June_B11_C11_...	June_B11_C11_...	Sally Bronsen	01/01/2020	12/31/2020	Perception Ana...

Monthly computations **Grouped by User = Max Jensen** and module field **Sales Stage**:

Accounts Contacts Opportunities Leads Calendar Reports Quotes **Target Module**

Target Module (9) Create

Filter Create Search by name...

Benchmark Name x is any of **June_B11_C11...**

Frequency x is any of **Monthly**

Advanced Related To x Selected User(s) **Max Jensen**

Results for Metric "June_B11_C11_Invoice_Calculations_Grouped_I" Reset Cancel Save

<input type="checkbox"/>	Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...	
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Max Jensen	06/01/2020	06/30/2020	Value Propositi...	
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Max Jensen	06/01/2020	06/30/2020	Qualification	
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Max Jensen	06/01/2020	06/30/2020	Prospecting	
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Max Jensen	06/01/2020	06/30/2020	Proposal/Price ...	
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Max Jensen	06/01/2020	06/30/2020	Perception Ana...	

Yearly computations **Grouped by User = Max Jensen** and module field **Sales Stage**:

Accounts Contacts Opportunities Leads Calendar Reports Quotes **Target Module**

Target Module (9) Create

Filter Create Search by name...

Benchmark Name x is any of **June_B11_C11...**

Frequency x is any of **Yearly**

Advanced Related To x Selected User(s) **Max Jensen**

Results for Metric "June_B11_C11_Invoice_Calculations_Grouped_I" Reset Cancel Save

<input type="checkbox"/>	Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...	
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Max Jensen	01/01/2020	12/31/2020	Value Propositi...	
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Max Jensen	01/01/2020	12/31/2020	Qualification	
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Max Jensen	01/01/2020	12/31/2020	Prospecting	
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Max Jensen	01/01/2020	12/31/2020	Proposal/Price ...	
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Max Jensen	01/01/2020	12/31/2020	Perception Ana...	

Monthly computations **Grouped by User = Chris Oliver** and module field **Sales Stage**:

Accounts Contacts Opportunities Leads Calendar Reports Quotes **Target Module**

Target Module (9) Create

Filter Create Search by name...

Benchmark Name x is any of June_B11_C... - +

Frequency x is any of Monthly - +

Advanced Related To x Selected User(s) Chris Olliver - +

Results for Metric "June_B11_C11_Invoice_Calculations_Grouped_I" Reset Cancel Save

<input type="checkbox"/>	Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...	
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Chris Olliver	06/01/2020	06/30/2020	Value Propositi...	<input type="checkbox"/>
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Chris Olliver	06/01/2020	06/30/2020	Qualification	<input type="checkbox"/>
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Chris Olliver	06/01/2020	06/30/2020	Prospecting	<input type="checkbox"/>
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Chris Olliver	06/01/2020	06/30/2020	Proposal/Price ...	<input type="checkbox"/>
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Chris Olliver	06/01/2020	06/30/2020	Perception Ana...	<input type="checkbox"/>

Yearly computations **Grouped by User = Chris Oliver** and module field **Sales Stage**:

Accounts Contacts Opportunities Leads Calendar Reports Quotes **Target Module**

Target Module (9) Create

Filter Create Search by name...

Benchmark Name x is any of June_B11_C... - +

Frequency x is any of Yearly - +

Advanced Related To x Selected User(s) Chris Olliver - +

Results for Metric "June_B11_C11_Invoice_Calculations_Grouped_I" Reset Cancel Save

<input type="checkbox"/>	Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...	
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Chris Olliver	01/01/2020	12/31/2020	Value Propositi...	<input type="checkbox"/>
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Chris Olliver	01/01/2020	12/31/2020	Qualification	<input type="checkbox"/>
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Chris Olliver	01/01/2020	12/31/2020	Prospecting	<input type="checkbox"/>
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Chris Olliver	01/01/2020	12/31/2020	Proposal/Price ...	<input type="checkbox"/>
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Chris Olliver	01/01/2020	12/31/2020	Perception Ana...	<input type="checkbox"/>

Monthly computations **Grouped by User = Sarah Smith** and module field **Sales Stage**:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Target Module

Dashboard

Target Module (9) Create

Filter Create Search by name...

Benchmark Name is any of June_B11_C11_...

Frequency is any of Monthly

Advanced Related To Selected User(s) Sarah Smith

Results for Metric "June_B11_C11_Invoice_Calculations_Grouped_I" Reset Cancel Save

Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...
June_B11_C11_...	June_B11_C11_...	Sarah Smith	06/01/2020	06/30/2020	Value Propositi...
June_B11_C11_...	June_B11_C11_...	Sarah Smith	06/01/2020	06/30/2020	Qualification
June_B11_C11_...	June_B11_C11_...	Sarah Smith	06/01/2020	06/30/2020	Prospecting
June_B11_C11_...	June_B11_C11_...	Sarah Smith	06/01/2020	06/30/2020	Proposal/Price ...
June_B11_C11_...	June_B11_C11_...	Sarah Smith	06/01/2020	06/30/2020	Perception Ana...

Yearly computations **Grouped by User = Sarah Smith** and module field **Sales Stage**:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Target Module

Dashboard

Target Module (9) Create

Filter Create Search by name...

Benchmark Name is any of June_B11_C11_...

Frequency is any of Yearly

Advanced Related To Selected User(s) Sarah Smith

Results for Metric "June_B11_C11_Invoice_Calculations_Grouped_I" Reset Cancel Save

Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...
June_B11_C11_...	June_B11_C11_...	Sarah Smith	01/01/2020	12/31/2020	Value Propositi...
June_B11_C11_...	June_B11_C11_...	Sarah Smith	01/01/2020	12/31/2020	Qualification
June_B11_C11_...	June_B11_C11_...	Sarah Smith	01/01/2020	12/31/2020	Prospecting
June_B11_C11_...	June_B11_C11_...	Sarah Smith	01/01/2020	12/31/2020	Proposal/Price ...
June_B11_C11_...	June_B11_C11_...	Sarah Smith	01/01/2020	12/31/2020	Perception Ana...

Monthly computations **Grouped by User = Will Westin** and module field **Sales Stage**:

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ **Target Module** ▾

Target Module (9) Create

Filter Create Search by name...

Benchmark Name x ▾ is any of ▾ **June_B11_C...** - +

Frequency x ▾ is any of ▾ **Monthly** - +

Advanced Related To x ▾ Selected User(s) ▾ **Will Westin** - +

Results for Metric "June_B11_C11_Invoice_Calculations_Grouped_I" Reset Cancel Save

<input type="checkbox"/>	Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...	⚙
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Will Westin	06/01/2020	06/30/2020	Value Propositi...	👁 ▾
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Will Westin	06/01/2020	06/30/2020	Qualification	👁 ▾
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Will Westin	06/01/2020	06/30/2020	Prospecting	👁 ▾
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Will Westin	06/01/2020	06/30/2020	Proposal/Price ...	👁 ▾
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Will Westin	06/01/2020	06/30/2020	Perception Ana...	👁 ▾

Yearly computations **Grouped by User = Will Westin** and module field **Sales Stage**:

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ **Target Module** ▾

Target Module (9) Create

Filter Create Search by name...

Benchmark Name x ▾ is any of ▾ **June_B11_C...** - +

Frequency x ▾ is any of ▾ **Yearly** - +

Advanced Related To x ▾ Selected User(s) ▾ **Will Westin** - +

Results for Metric "June_B11_C11_Invoice_Calculations_Grouped_I" Reset Cancel Save

<input type="checkbox"/>	Name	Benchmark Na...	Related To	Start Date	End Date	Grouped By So...	⚙
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Will Westin	01/01/2020	12/31/2020	Value Propositi...	👁 ▾
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Will Westin	01/01/2020	12/31/2020	Qualification	👁 ▾
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Will Westin	01/01/2020	12/31/2020	Prospecting	👁 ▾
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Will Westin	01/01/2020	12/31/2020	Proposal/Price ...	👁 ▾
<input type="checkbox"/>	June_B11_C11_...	June_B11_C11_...	Will Westin	01/01/2020	12/31/2020	Perception Ana...	👁 ▾

Monthly computations **Grouped by User = Jim Brennan** and module field **Sales Stage**:

The screenshot shows the 'Target Module' configuration interface. The filter section is highlighted with a red box and contains the following settings:

- Benchmark Name:** is any of **June_B11_C...**
- Frequency:** is any of **Monthly**
- Advanced Related To:** Selected User(s) **Jim Brennan**

Below the filter section, the results table is shown for the metric 'June_B11_C11_Invoice_Calculations_Grouped_I'. The table has columns: Name, Benchmark Na..., Related To, Start Date, End Date, and Grouped By So... The data rows show results for 'Jim Brennan' with start and end dates of 06/01/2020 and 06/30/2020, and various grouped categories like 'Value Propositi...', 'Qualification', 'Prospecting', 'Proposal/Price ...', and 'Perception Ana...'.

Yearly computations **Grouped by User = Jim Brennan** and module field **Sales Stage**:

The screenshot shows the 'Target Module' configuration interface. The filter section is highlighted with a red box and contains the following settings:

- Benchmark Name:** is any of **June_B11_C...**
- Frequency:** is any of **Yearly**
- Advanced Related To:** Selected User(s) **Jim Brennan**

Below the filter section, the results table is shown for the metric 'June_B11_C11_Invoice_Calculations_Grouped_I'. The table has columns: Name, Benchmark Na..., Related To, Start Date, End Date, and Grouped By So... The data rows show results for 'Jim Brennan' with start and end dates of 01/01/2020 and 12/31/2020, and various grouped categories like 'Value Propositi...', 'Qualification', 'Prospecting', 'Proposal/Price ...', and 'Perception Ana...'.

2. Calculate metrics for: Users, Teams, and System/Global

Module Field: Account - Type

Frequency: Yearly

Create a new benchmark record and fill in all the fields from the following image.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails Campaigns

WB Name June

Manage Goals Manage Studio Fields Run Scheduler Now Generate Scheduler Cancel Save

General Definitions Retention

Automatic Computation Status: Active

Target Module: Target Module

Group By Users:

Group By Module: Accounts

Group By Field: Modified By

Create metrics for Users:

Calculate For: Day Week Month Quarter Year

Show More

Related All Filter All Records Search...

Ensure that the **Users** and **Teams** subpanels are available and will be filled with the attached details.

Accounts Contacts Opportunities Leads Calendar wBenchmark

WB Name June

Manage Goals Manage Studio Fields Run Scheduler No

Show More

Related All Filter All Records Search...

Us **USERS (1)**

Full Name	User Name	Title	Department
Mihaela Bulacu	mbulacu		

Te **TEAMS (1)**

Team Name	Date Modified
West	04/07/2020 04:50pm

Go to the **Definitions** tab and add two definitions as follows:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails

WB Name June Manage Goals Manage Studio Fields Run Scheduler Now Configure Scheduler

Ac ACCOUNTS [# 1]: LBL_W_DATETIME from TM Target Module = MIN (Date Created) filtered by All Accounts

Definition # 1 Displayed as Minimum Date Created and calculated as MIN of Date Created (date_entered) from Accounts filtered by All Accounts saved on field LBL_W_DATETIME (w_datetime_c) from Target Module

Display Name
Minimum Date Created

Select Operation (what operation we should do with source data)
Min

Select Source Field (from where we get data)
Date Created

Select Destination Field (where to store the result)
LBL_W_DATETIME

User field used to group records (optional)
Assigned to

Date field used to limit record selection to evaluated time period (optional)
Ignore Date Field

Filter Create Search by name...

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails

WB Name June Manage Goals Manage Studio Fields Run Scheduler Now Generate Scheduler

Ac ACCOUNTS [# 2]: LBL_W_INTEGER from TM Target Module = COUNT filtered by All Accounts

Definition # 2 Displayed as No of Accounts and calculated as COUNT of Accounts filtered by All Accounts saved on field LBL_W_INTEGER (w_integer_c) from Target Module

Display Name
No of Accounts

Select Operation (what operation we should do with source data)
Count

Select Destination Field (where to store the result)
LBL_W_INTEGER

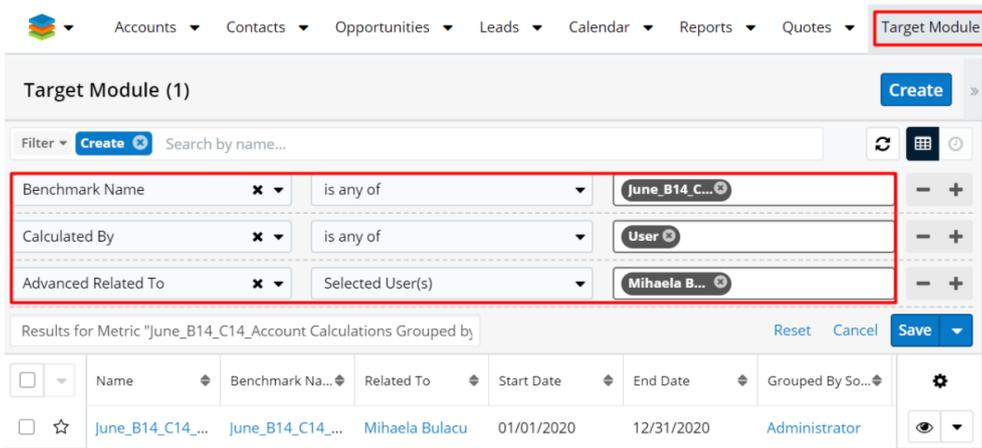
User field used to group records (optional)
Assigned to

Date field used to limit record selection to evaluated time period (optional)
Ignore Date Field

Filter Create Search by name...

Save the benchmark record, Generate Scheduler Job, Configure and Runs Scheduler Now. Go to Target Module and see that the following computations are generated.

Yearly Computations Grouped by User and Module Field Set to Account Type:



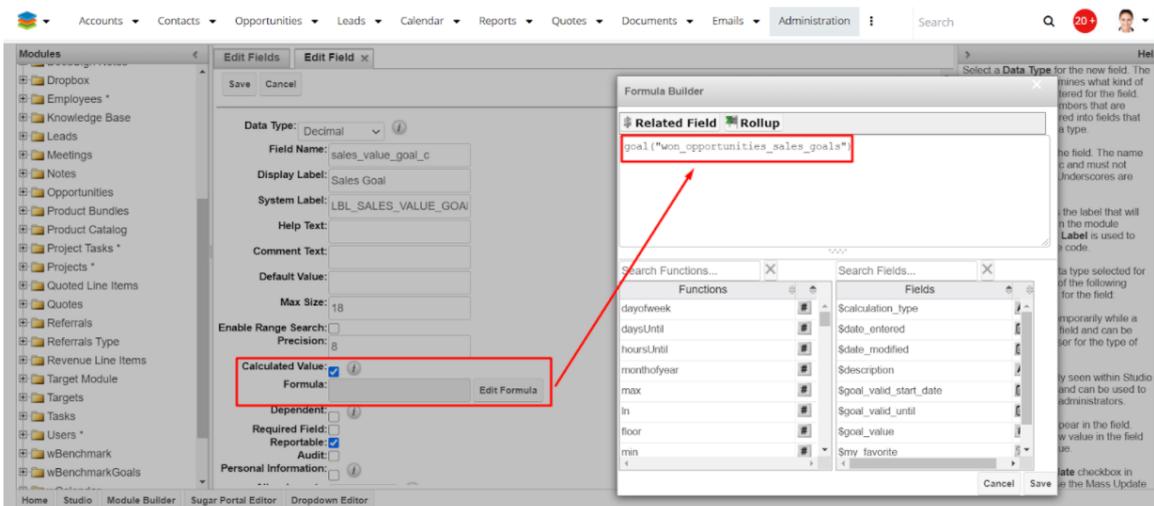
The benchmark computations are calculated for each value of the selected **Module Field** , for each **Linked User** , and for the **Year** when the computation was performed.

Goals

- [Goal Formulas](#)
- [Creating Goals](#)
- [Uploading Goals](#)

Goal Formulas

The **Goal Formula** will be added in the **Formula Builder** (on **Target Module**) of a **calculated field in Sugar Studio**:



Creating Goals

Two modules are used to create a goal:

- **The wBenchmark Goal Group module** (#sys_wMetricGoals) this is the main module, where we will define types of goals. The module can be accessed via "Manage Goals" buttons from wBenchmark list view and record view.
- **'wBenchmark Goal Detail' module** (#sys_wTargetGoals) this module will store the Related wBenchmark Goals. The module is hidden by default as these records are created from a wBenchmark Goal Group record view.

The first step is to create a record on '**wBenchmark Goal Group**' (sys_wMetricGoals) module.

The screenshot shows the 'wBenchmark Goal Groups' form in SugarCRM. The 'Name' field is highlighted with a red box and contains the text 'Won Sales Opportunities Goal'. Below the name field, there are several sections: 'Business Card' with 'Default Goal Values', 'Goal Key' with the value 'won_sales opportunities goal', 'Goal Formula' (add to wBenchmark Target module using Sugar Studio), 'Assigned to' with 'Administrator', and 'Teams' with 'Global'. At the bottom, there is a table for 'Related wBenchmark Goals' with columns: Relate to, Calculation Type, Goal Valid Start Date, Goal Valid Until, and Goal value.

Name is required and the other fields are calculated.

Note: The name should always have a unique value, therefore the record cannot be saved if a duplicate record is found. If the name is changed to a unique value and click on the drawer, the record can be saved.

The Goal Key is calculated with the text from Name to lowercase where spaces are replaced with under- score (" _ ")

Accounts Contacts Opportunities Leads Calendar Reports wBenchmark Goal Groups

Name: Won Sales Opportunities Goal

Business Card Default Goal Values

Goal Key: won_sales_opportunities_goal

Goal Formula (add to wBenchmark Target module using Sugar Studio): goal("won_sales_opportunities_goal")

Assigned to: Administrator

Teams: Global

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value

Related wBenchmark Goals

Related All Filter All Records Search...

Note: If the name of the wBenchmark Goal Group record is "Won Sales Opportunities Goal" the Goal Key will be "won_sales_opportunities_goal".

'Goal Formula (add to wBenchmark Target module using Sugar Studio)' - this is an auto generated goal formula based on the Goal key.

Note: If the value of Goal Key is won_sales_opportunities_goal the value for Goal Formula will be goal("won_sales_opportunities_goal").

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents wBenchmark

Name: Won Sales Opportunities Goal

Business Card Default Goal Values

Goal Key: won_sales_opportunities_goal

Goal Formula (add to wBenchmark Target module using Sugar Studio): goal("won_sales_opportunities_goal")

Assigned to: Administrator

Teams: Global

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value

Related wBenchmark Goals

Related All Filter All Records Search...

Note: This formula will be added to a calculated numeric field from the wBenchmarkTarget module.

The Default Goal Values tab contains fields that will be used for users and teams that do not have Related wBenchmark Goals defined individually or if the defined Related wBenchmark Goals are in a different time period.

The fields are the following:

- **Default User Daily Goal:** for daily goal calculated for user
- **Default User Weekly Goal:** for weekly goal calculated for user
- **Default User Monthly Goal:** for monthly goal calculated for user
- **Default User Quarterly Goal:** for quarterly goal calculated for user
- **Default User Yearly Goal:** for yearly goal calculated for user
- **Default Team Daily Goal:** for daily goal calculated for team
- **Default Team Weekly Goal:** for weekly goal calculated for team
- **Default Team Monthly Goal:** for monthly goal calculated for team
- **Default Team Quarterly Goal:** for quarterly goal calculated for team
- **Default Team Yearly Goal:** for yearly goal calculated for team

The screenshot shows a CRM form for a record named "Won Sales Opportunities Goal". The form has two tabs: "Business Card" and "Default Goal Values". The "Default Goal Values" tab is active and contains ten input fields arranged in two columns. The left column contains fields for "Default User Daily Goal" (value: 1), "Default User Weekly Goal" (value: 2), "Default User Monthly Goal" (value: 3), "Default User Quarterly Goal" (value: 4), and "Default User Yearly Goal" (value: 5). The right column contains fields for "Default Team Daily Goal" (value: 11), "Default Team Weekly Goal" (value: 22), "Default Team Monthly Goal" (value: 33), "Default Team Quarterly Goal" (value: 44), and "Default Team Yearly Goal" (value: 55). At the bottom of the form, there is a "Related" section with a filter set to "All Records" and a search bar.

After saving the "**wBenchmark Goal Group**" record, the following section is available on record view:

The Related **wBenchmark Goals** are wTargetGoal records linked to the current **wBenchmark Goal Group**.

On the **Related wBenchmark Goals** sections, from '**wBenchmark Goal Group**' record view, new goals can be added by using the "+" button.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents wBenchmark Goal

WG Won Sales Opportunities Goal ☆ [+ Create Goal](#) [Upload Goals](#) [Edit](#)

Business Card Default Goal Values

Goal Key: won_sales_opportunities_goal
Goal Formula: goal("won_sales_opportunities_goal")

Assigned to: Administrator
Teams: Global (Primary)

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	+
-----------	------------------	-----------------------	------------------	------------	---

Related Filter All Records Search...

When the "+" button is pressed, a new row in edit mode is added to the Related wBenchmark Goals.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents wBenchmark Goal

WG Won Sales Opportunities Goal ☆ [Create Goal](#) [Upload Goals](#) [Edit](#)

Business Card Default Goal Values

Goal Key: won_sales_opportunities_goal
Goal Formula: goal("won_sales_opportunities_goal")

Assigned to: Administrator
Teams: Global (Primary)

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	+	
Us...	Requi...	Monthly	(Required) mm	(Required) mm	Required	Cancel Save

Related Filter All Records Search...

On Related wBenchmark Goals all fields are required; an error will be displayed if a field is empty:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents wBenchmark Goal

WG Won Sales Opportunities Goal ☆ [Error Please fill in all fields for related goal](#)

Business Card Default Goal Values

Goal Key: won_sales_opportunities_goal
Goal Formula: goal("won_sales_opportunities_goal")

Assigned to: Administrator
Teams: Global (Primary)

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	+	
Us...	Mih...	Monthly	(Required) mm	(Required) mm	Required	Cancel Save

Related Filter All Records Search...

Relate To: On the **Relate To** column, the following options are available:

- **User:** a user can be selected and goals can be defined for that user
- **Team:** a team can be selected and goals can be defined for that team
- **User in Team:** a team can be selected and goals can be defined for the users from that team

The screenshot shows the 'Won Sales Opportunities Goal' form. The 'Relate to' dropdown menu is open, showing options: 'User', 'Team', and 'User in Te...'. The 'Calculation Type' is set to 'Monthly'. The 'Goal Valid Start Date' and 'Goal Valid Until' fields are both set to '(Required) mm' with calendar icons. The 'Goal value' field is set to 'Required'. There are 'Cancel' and 'Save' buttons.

Calculation Type is the equivalent for the **Frequency** field from a wBenchmarkTarget module. The calculation types are: Daily, Weekly, Monthly, Quarterly, Yearly.

The screenshot shows the 'Won Sales Opportunities Goal' form. The 'Calculation Type' dropdown menu is open, showing options: 'Daily', 'Weekly', 'Monthly', 'Quarterly', and 'Yearly'. The 'Relate to' dropdown is set to 'User'. The 'Goal Valid Start Date' and 'Goal Valid Until' fields are both set to '(Required) mm' with calendar icons. The 'Goal value' field is set to 'Required'. There are 'Cancel' and 'Save' buttons.

Goal Valid Until and **Goal Valid Start Date** are date pickers:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails wBenchmark Goal

WG Won Sales Opportunities Goal ☆ Create Goal Upload Goals Edit

Business Card Default Goal Values

Goal Key: won_sales_opportunities_goal
Goal Formula: goal("won_sales_opportunities_goal")

Assigned to: Administrator
Teams: Global (Primary)

Related wBenchmark Goals

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value
User	Required Monthly	(Required) mm/dd	(Required) mm	Required

Calendar: June 2020
 Su Mo Tu We Th Fr Sa
 31 1 2 3 4 5 6
 7 8 9 10 11 12 13
 14 15 16 17 18 19 20
 21 22 23 24 25 26 27
 28 29 30 1 2 3 4
 5 6 7 8 9 10 11

The value of the **Goal Valid Until** field must be a date equal or earlier than the **Goal Valid Start Date** value, otherwise an error will be raised:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails wBenchmark Goal Gr

WG Won Sales Opportunities Goal ☆ Error Please fill in all fields for related goal with correct values

Business Card Default Goal Values

Goal Key: won_sales_opportunities_goal
Goal Formula: goal("won_sales_opportunities_goal")

Assigned to: Administrator
Teams: Global (Primary)

Related wBenchmark Goals

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value
User	Mihaela Bul... Monthly	06/23/2020	06/14/2020	5

Goal value is a numeric field; an error will be raised if its value is not numeric:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails wBenchmark Goal Group

WG Won Sales Opportunities Goal ☆ Error Please fill in all fields for related goal with correct values

Business Card Default Goal Values

Goal Key: won_sales_opportunities_goal
Goal Formula: goal("won_sales_opportunities_goal")

Assigned to: Administrator
Teams: Global (Primary)

Related wBenchmark Goals

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value
User	Mihaela Bul... Monthly	06/23/2020	06/25/2020	w

After all fields are filled in, upon clicking the **Save** button, a new **wTargetGoal** record will be created and will be displayed in the **Related wBenchmark Goals** section.

The screenshot shows the 'Won Sales Opportunities Goal' record in SugarCRM. The 'Related wBenchmark Goals' section is highlighted with a red box. It contains a table with the following data:

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	
Us Mihaela Bulacu	Monthly	06/23/2020	06/25/2020	50.00	[Edit] [Delete] [Add]

On the **Related wBenchmark Goals** section, the following buttons are available:

The screenshot shows the 'Won Sales Opportunities Goal' record in SugarCRM. The 'Related wBenchmark Goals' section is highlighted with a red box. It contains a table with the following data:

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	
Us Mihaela Bulacu	Monthly	06/23/2020	06/25/2020	50.00	[Edit] [Delete] [Add]

Create Goal - pushing this button will add another row of fields necessary to define a new goal.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents wBenchmark Goal

WG Won Sales Opportunities Goal ☆ [+ Create Goal](#) [Upload Goals](#) [Edit](#)

Business Card Default Goal Values

Goal Key: won_sales_opportunities_goal
 Goal Formula (add to wBenchmark Target module using Sugar Studio): goal("won_sales_opportunities_goal")

Assigned to: Administrator
 Teams: Global (Primary)

Related wBenchmark Goals

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	
Us Mihaela Bulacu	Monthly	06/23/2020	06/25/2020	50.00	+

Related **All** Filter **All Records** Search...

Edit Goal - pushing this button will open a goal previously created in Edit mode.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents wBenchmark Goal

WG Won Sales Opportunities Goal ☆ [+ Create Goal](#) [Upload Goals](#) [Edit](#)

Business Card Default Goal Values

Goal Key: won_sales_opportunities_goal
 Goal Formula (add to wBenchmark Target module using Sugar Studio): goal("won_sales_opportunities_goal")

Assigned to: Administrator
 Teams: Global (Primary)

Related wBenchmark Goals

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	
Us Mihaela Bulacu	Monthly	06/23/2020	06/25/2020	50.00	 + 

Related **All** Filter **All Records** Search...

Edit Goal

Remove Goal - pushing this button will remove the goal from the wTargetGoal module.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents wBenchmark Goal

WG Won Sales Opportunities Goal ☆ [+ Create Goal](#) [Upload Goals](#) [Edit](#)

Business Card Default Goal Values

Goal Key: won_sales_opportunities_goal
 Goal Formula (add to wBenchmark Target module using Sugar Studio): goal("won_sales_opportunities_goal")

Assigned to: Administrator
 Teams: Global (Primary)

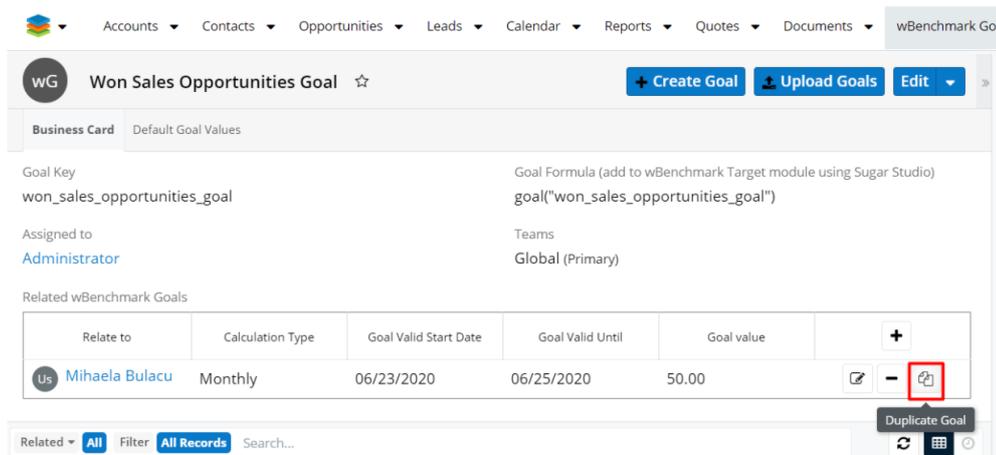
Related wBenchmark Goals

Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	
Us Mihaela Bulacu	Monthly	06/23/2020	06/25/2020	50.00	 - 

Related **All** Filter **All Records** Search...

Remove Goal

Duplicate Goal - this option allows the user to create another goal with the same field values.



Related wBenchmark Goals Visibility

When a Related wBenchmark Goal record is created, the **Assigned To** field is by default populated with the **System Administrator**.

If the **Related To is a user**, the teams of the Related wBenchmark Goal record will be:

- User private team
- If the user reports to another user then the private team of that user will be added
- Teams from goal group except for Global team
- Administrator team

If the **Related To is a team**, the teams of the Related wBenchmark Goal record will be:

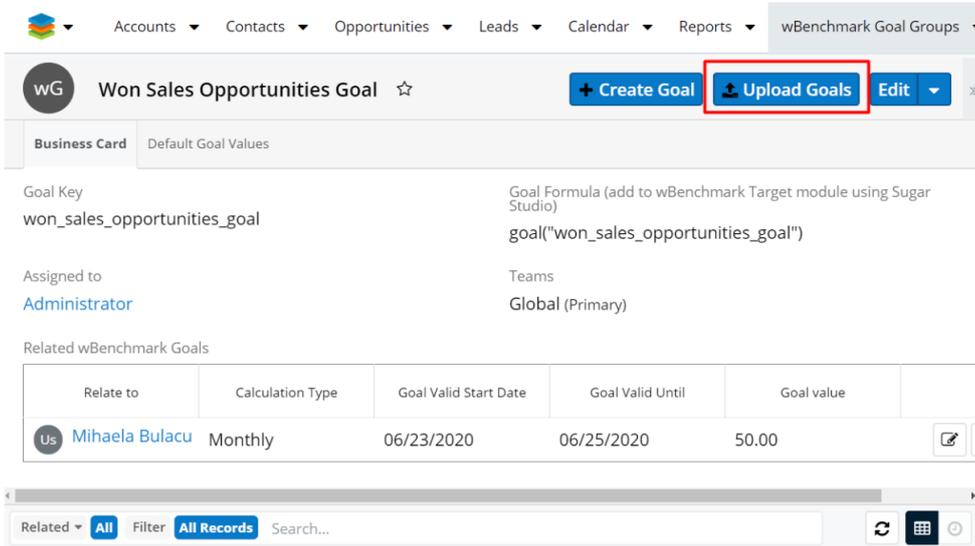
- Teams from goal group except for Global team
- Related To team
- Administrator team

Due to the above, user and team assignment, the Goals visibility is as follows:

- An admin user will see all Goals from the system
- A regular user will see:
 - Their Goals
 - Goals of users that report to him
 - Goals of teams he is a member of
 - Goals of other users from the same team that he is a member of, only if that team was added on the wBenchmark Goal Group record

Uploading Goals

On the header of wBenchmark Goal Group record view the button **"Upload Goals"** is available for admin users and regular users that have the role **"Market Admin"** or **"Market Admin - Goals"**.



The screenshot shows the wBenchmark Goal Groups interface. At the top, there are navigation tabs: Accounts, Contacts, Opportunities, Leads, Calendar, Reports, and wBenchmark Goal Groups. Below this, the record view for 'Won Sales Opportunities Goal' is shown. The header includes a 'wG' icon, the goal name, and three buttons: '+ Create Goal', 'Upload Goals' (highlighted with a red box), and 'Edit'. Below the header, there are two tabs: 'Business Card' and 'Default Goal Values'. The main content area displays goal details: Goal Key (won_sales_opportunities_goal), Goal Formula (goal("won_sales_opportunities_goal")), Assigned to (Administrator), and Teams (Global (Primary)). A table titled 'Related wBenchmark Goals' shows one record for Mihaela Bulacu with a value of 50.00. At the bottom, there is a search bar and a 'Next Step >' button.

The button opens a page where the user can upload a **CSV** file containing Goals for users and teams. Each row in the CSV will be used to create a new Goal record. The goal record that is created will be related to the wBenchmark Goal Group record where the Upload Goal button is clicked.

Step 1: Upload Import File

Select a file on your computer that contains the data that you would like to import, or download the template to get a head start on creating the import file.

Click to: [See Import Template File Guidelines](#) Or [Download Import File Template](#) ⓘ

Select file: * No file chosen ⓘ

First line from the uploaded file is the Header: ⓘ

What would you like to do with the imported data?

- Create new records only ⓘ
- Create new records and update existing records ⓘ

[Next Step >](#)

By clicking on the **Click to See Import Template File Guidelines** hyperlink, details about the fields imported in the csv file will be displayed.

Step 1: Upload Import File

CSV column	Goal Field	Explication / Restrictions
Team/User	Related to (Module)	Accepted Values: Teams or Users
Name	Related to (Record from Module)	This will be a lookup of users/teams by name. ID of the User/Team will be added here
Calculation Type	Calculation Type	Accepted Values: Daily, Weekly, Monthly, Quarterly OR Yearly
Goal Valid Start Date	Goal Valid Start Date	Accepted format mm-dd-yyyy - <i>mm</i> = Numeric representation of a month, with leading zeros - <i>dd</i> = Day of the month, 2 digits with leading zeros - <i>yyyy</i> = A full numeric representation of a year, 4 digits
Goal Valid Until	Goal Valid Until	Accepted format mm-dd-yyyy - <i>mm</i> = Numeric representation of a month, with leading zeros - <i>dd</i> = Day of the month, 2 digits with leading zeros - <i>yyyy</i> = A full numeric representation of a year, 4 digits
Goal Value	Goal Value	Use only point(.) for decimal separator. Don't include other separators or use other formats

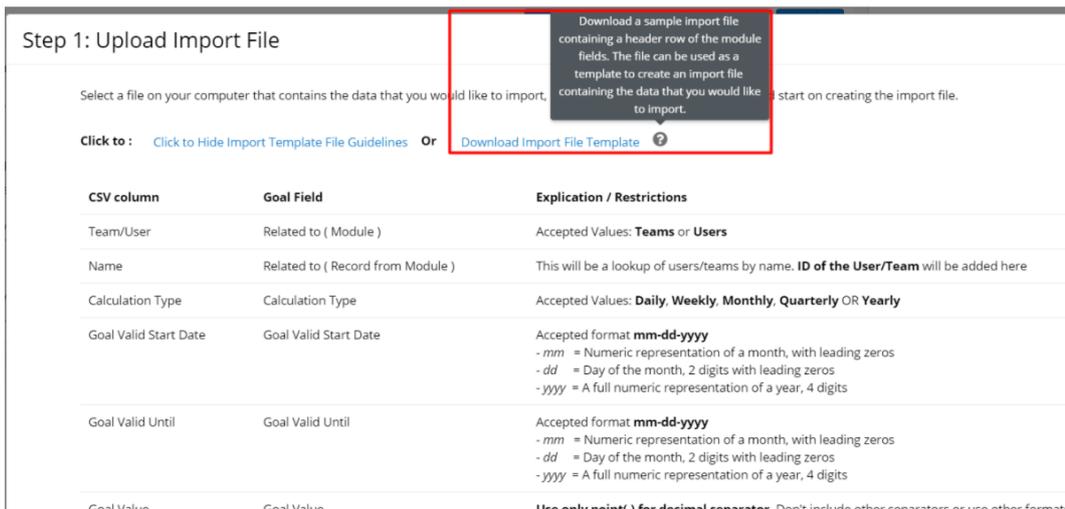
Select file: * No file chosen ?

First line from the uploaded file is the Header: ?

What would you like to do with the imported data?

- Create new records only ?
- Create new records and update existing records ?

Users can download a template of the **CSV** by clicking on the **Download Import File Template** hyperlink.



The header of the CSV file that will be imported is:

"Team/User", "Name", "Calculation Type", "Goal Valid Start Date", "Goal Valid Until", "Goal Value"

The CSV columns are set up as below:

- **Team/User:** the values accepted are Teams or Users
- **Name:** here will add the ID of the User/Team
- **Calculation Type:** the values accepted are Daily, Weekly, Monthly, Quarterly OR Yearly
- **Goal Valid Start Date:** accepted format mm-dd-yyyy

mm = Numeric representation of a month, with leading zeros

dd = Day of the month, 2 digits with leading zeros

yyyy = A full numeric representation of a year, 4 digits

- **Goal Valid Until:** accepted format mm-dd-yyyy

mm = Numeric representation of a month, with leading zeros

dd = Day of the month, 2 digits with leading zeros

yyyy = A full numeric representation of a year, 4 digits

- **Goal Value:** a numeric value is accepted here and point(.) as decimal separator

The **First line from the uploaded file is the Header** option needs to be checked if the CSV file contains the header:

"Team/User","Name","Calculation Type","Goal Valid Start Date","Goal Valid Until","Goal Value"

What would you like to do with the imported data?

Create new records only: if this is selected new records will be created

Create new records and update existing records: if this option is selected, the existing record will be updated. The Goal Value will be updated on existing records if a match will be found based on the following fields: Related To, Calculation Type, Goal Valid Start Date, Goal Valid Until

If the **Related To value is a user**, the teams of the created record will be:

- User private team
- If the user reports to another user then the private team of that user will be added
- Teams from goal group except for global team
- Administrator team

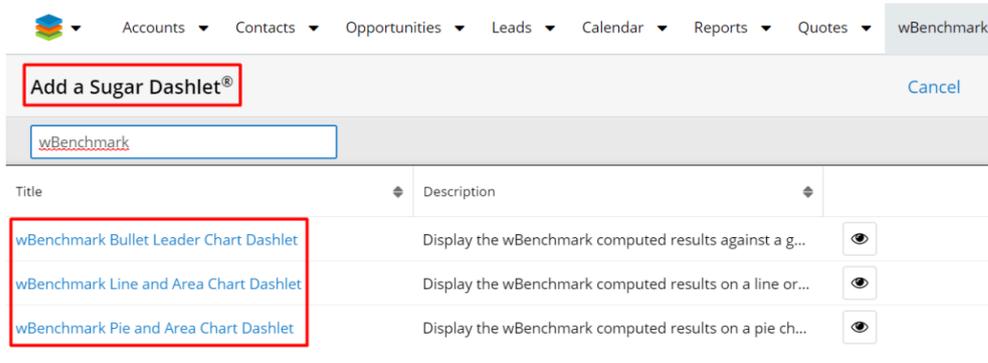
If the **Related To is a team**, the teams of the created record will be:

- Teams from goal group except for global team
- Related To team
- Administrator team

wBenchmark Dashlets

The **wBenchmark package** provides 3 dashlets:

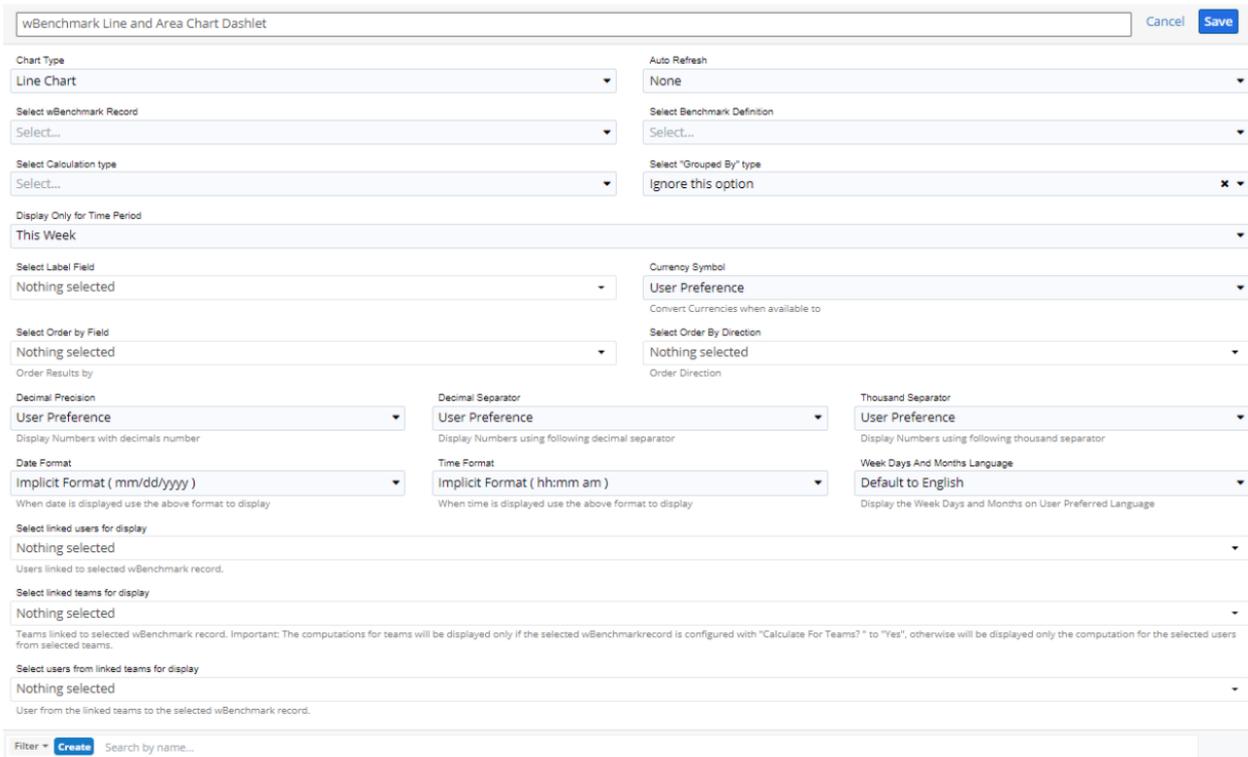
- [wBenchmark Line and Area Chart Dashlet](#)
- [wBenchmark Bullet Leader Chart Dashlet](#)
- [wBenchmark Pie and Area Chart Dashlet](#)



The new dashlets will be available on both the **Home** dashboard and **Intelligence Pane** of all modules' **List Views** and **Record Views**.

wBenchmark Line and Area Chart Dashlet

The dashlet displays the computed results of the wBenchmark record on a chart.

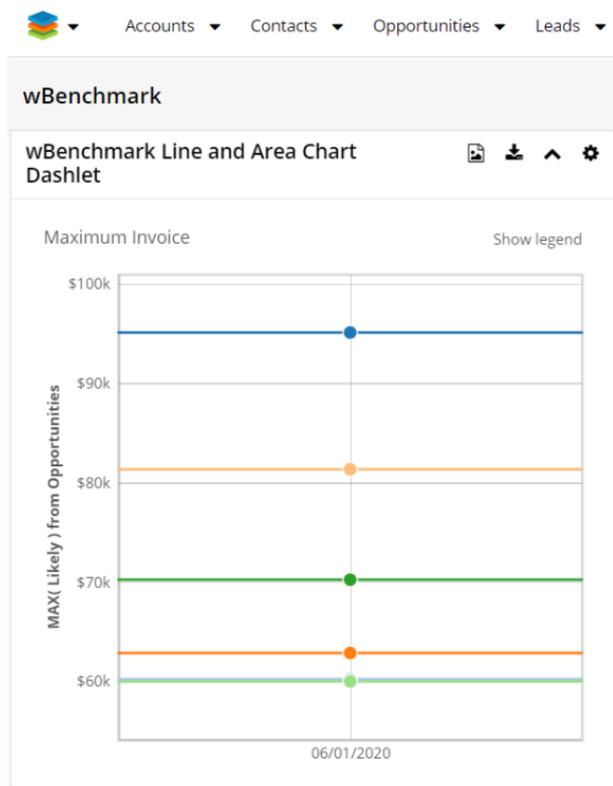


The wBenchmark Line and Area Chart Dashlet configuration drawer contains:

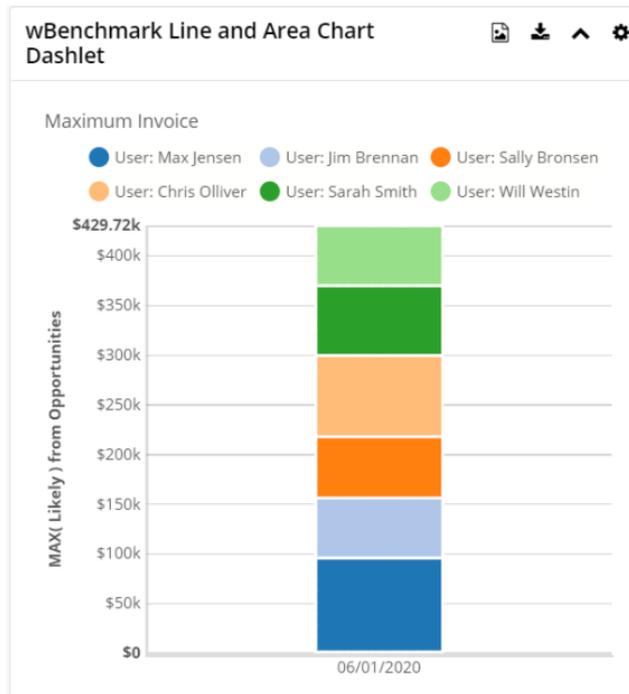
Name - this field is set by default to **wBenchmark Line and Area Chart Dashlet** and can be changed by the user. The Name field should not be empty.

Chart Type - The chart type options are:

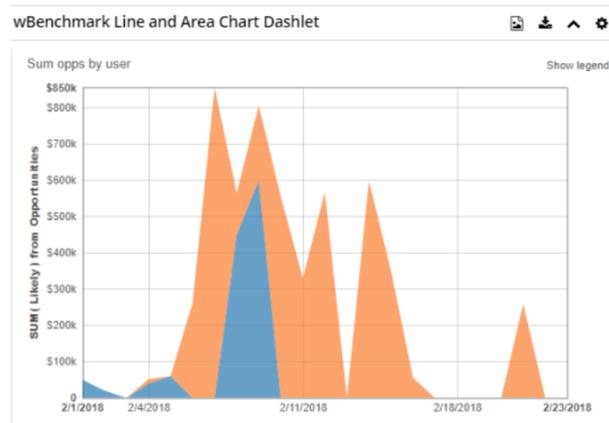
- Line Chart



- Vertical Stacked Bar



- Stacked Area



Auto Refresh - this option will automatically refresh the dashlet.

Auto Refresh

None

None

Every 1 Minutes

Every 5 Minutes

Every 10 Minutes

Every 15 Minutes

Every 30 Minutes

Select wBenchmark Record - Is a dropdown with all wBenchmark records. The field is required and needs to be selected first for the next fields to be populated.

Select Benchmark Definition - Is a required dropdown field that contains the definitions from the selected wBenchmark record.

Select Calculation Type - Is a required dropdown field that contains the calculations types (Daily, Weekly, Monthly, Quarterly, Yearly) marked with "Yes" on the selected wBenchmark record.

Select "Grouped By" type - This field could have four options: User, Module Field, Users & Module Field, and Ignore this option. See that only the selected benchmark grouped by type is available.

Display Only for Time Period - Is a dropdown list that will define the period displayed on the chart. The options are: This Week, Last Week, This Month, Last Month, This Quarter, Last Quarter, This Year, Last Year, All Times, Custom Date Range

Select Label Field - This field defines the label. The value of this field will almost always be the **Relate To** (parent_name) field.

Currency Symbol - This field displays all system currency values and Convert Currencies when available

Select Order by Field - Order results by the selected field

Select Order By Direction - This field have two options available: Ascending and Descending

The screenshot shows a web application interface for configuring a 'wBenchmark Line and Area Chart Dashlet'. At the top, there is a navigation bar with tabs for 'Accounts', 'Contacts', 'Opportunities', 'Leads', 'Calendar', 'Reports', 'Quotes', and 'wBenchmark'. Below the navigation bar is a search bar containing the text 'wBenchmark Line and Area Chart Dashlet' and buttons for 'Cancel' and 'Save'. The main configuration area consists of several dropdown menus:

- Chart Type:** Line Chart
- Auto Refresh:** None
- Display Only for Benchmark Record:** Select...
- Benchmark Definition:** Select...
- Display only Calculation Type:** Ignore this option
- Display only "Grouped By" type:** Ignore this option
- Frequency:** Select...
- Display Only for Time Period:** This Week
- Select Label Field:** Nothing selected
- Currency Symbol:** User Preference
- Convert Currencies when available to:** (checkbox)
- Select Order by Field:** Nothing selected
- Select Order By Direction:** Nothing selected

Decimal Precision - Display Numbers with decimals number

Decimal Separator - Display Numbers using following decimal separator

Thousand Separator - Display Numbers using following thousand separator

Date Format - When date is displayed use this format to display

Time Format - When time is displayed use this format to display

Week Days And Months Language - Display the Week Days and Months on User Preferred Language

Select linked users for display - This is a multi-select box with **Select All** and **Search** feature that contains the **Users** linked to the selected wBenchmark record. The users displayed can be selected/deselected all by using the buttons "**Select All** " and "**Deselect All**"; users can also be selected/deselected one by one.

Select linked users for display

Chris Olliver, Sarah Smith, Will Westin

Select linked users for display

Select All Deselect All

Chris Olliver ✓

Sarah Smith ✓

Will Westin ✓

Select linked teams for display - this is a multi-select box with both a **Select All** and **Search** feature that contains the **Teams** linked to the selected wBenchmark record. The teams displayed can be selected/deselected all by using the buttons "**Select All**" and "**Deselect All** ; teams can also be selected/deselected one by one.

Select linked teams for display

West

Select linked teams for display

Select All Deselect All

West ✓

Select users from linked teams for display - Is a multi-select box with Select All and Search feature that contains the members of all teams linked to the

wBenchmark record. The users displayed can be selected/ deselected all by using the buttons "**Select All**" and "**Deselect All**" or can be selected/deselected one by one.

The screenshot shows the 'wBenchmark' configuration dashlet. At the top, there is a navigation bar with 'wBenchmark' selected. Below it is a search bar containing 'wBenchmark Line and Area Chart Dashlet' and 'Cancel' and 'Save' buttons. The main area contains several settings:

- Decimal Precision:** User Preference (dropdown)
- Decimal Separator:** User Preference (dropdown)
- Thousand Separator:** User Preference (dropdown)
- Date Format:** Implicit Format (mm/dd/yyyy) (dropdown)
- Time Format:** Implicit Format (hh:mm am) (dropdown)
- Week Days And Months Language:** Default to English (dropdown)
- Break Down Result by Module Field Values?:** No (dropdown)
- Select linked users for display:** Nothing selected (dropdown)
- Select linked teams for display:** Nothing selected (dropdown)

The available users are grouped by team; all members of a team can be selected if the checkbox corresponding to that team is checked.

The screenshot shows a dialog box titled 'Select users from linked teams for display'. It has a search bar at the top and two buttons: 'Select All' and 'Deselect All'. Below the buttons is a list of users grouped by team:

Team	User	Selection
West	Jim Brennan	<input checked="" type="checkbox"/>
	Max Jensen	<input checked="" type="checkbox"/>
	Sally Bronsen	<input checked="" type="checkbox"/>
	Sarah Smith	<input checked="" type="checkbox"/>
Jim Brennan, Max Jensen, Sally Bronsen, Sarah Smith		<input checked="" type="checkbox"/>

At the bottom, there is a note: 'User from the linked teams to the selected wBenchmark record.'

Filter - a filter can be created for wBenchmarkTarget Module records that will be displayed on the chart. This section is populated with the corresponding filters of the target module only after a wBenchmark record is selected on the dashlet.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ ⋮

wBenchmark Line and Area Chart Dashlet Cancel Save

Nothing selected ▾

Teams linked to selected wBenchmark record. Important: The computations for teams will be displayed only if the selected wBenchmarkrecord is configured with "Calculate For Teams?" to "Yes", otherwise will be displayed only the computation for the selected users from selected teams.

Select users from linked teams for display

Nothing selected ▾

User from the linked teams to the selected wBenchmark record.

Filter ▾ Create ✕ Search by name...

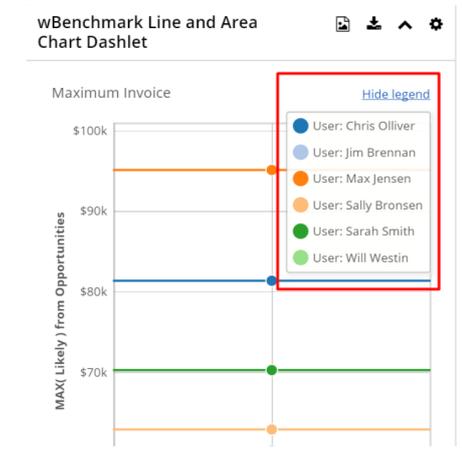
Benchmark Name ✕ ▾ is any of ▾ June_B14_C... ⓧ - +

Enter new filter name...

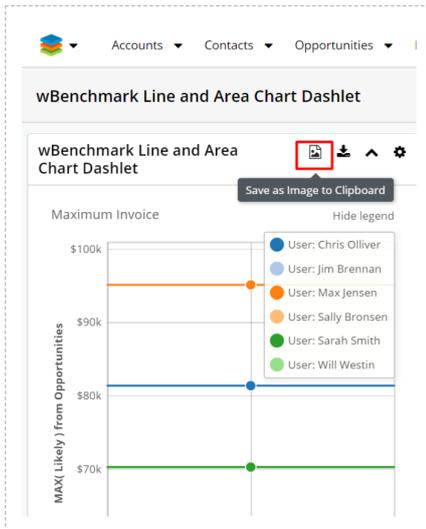
Save - Saves the configurations made for the dashlet

Cancel - The configurations made for the dashlet are canceled

Legend - Users and teams that are represented on the chart can be selected/deselected from the Legend option from the upper right corner of the dashlet.



Save as Image to Clipboard - This button is displayed on the dashlet header. When this button is clicked a popup will appear on the screen with the image of the chart generated. The users can download the image via right click and "**Save image as...**" or they can click on the image in order to copy it on clipboard:



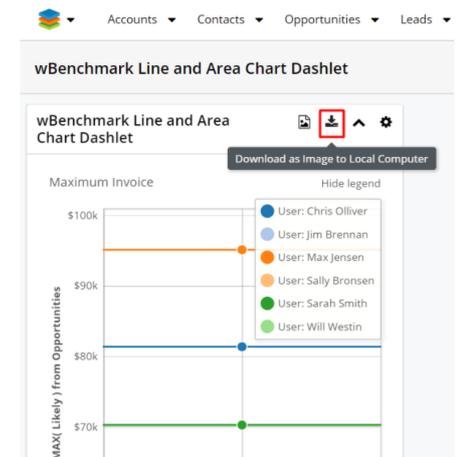
Dashlet wBenchmark Line and Area Chart Dashlet

- Image Generated with success .

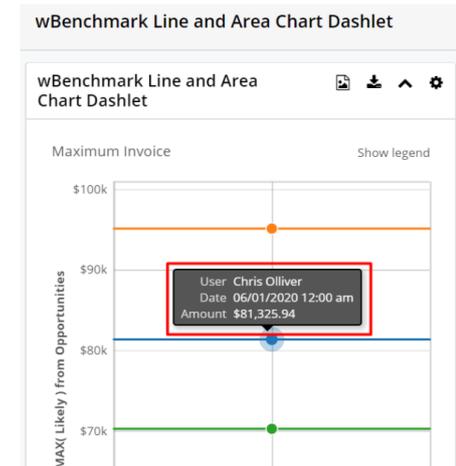
- You can:

1. **directly download** via Right Click and 'Save image as ...' option
2. **copy to clipboard** via click on it

Save as Image to Local Computer at Full HD Resolution - This button will download the chart as a PNG image.



The available tooltips will display the details on all types of chart.



wBenchmark Leader Bullet Chart

The **wBenchmark Leader Bullet Chart Dashlet** is a dashlet that displays the computed results against a goal.

The configuration drawer for the 'wBenchmark Bullet Leader Chart Dashlet' includes the following settings:

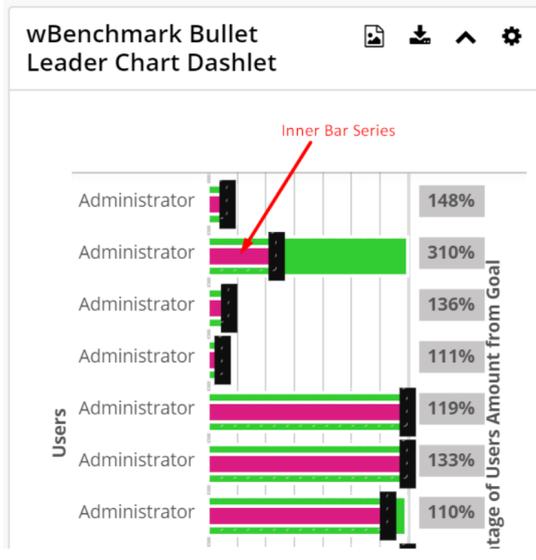
- Module:** Target Module
- Inner Bar Series:** Invoice Avg
- Inner Bar Color Series:** #000080
- Outer Bar Series:** Invoice Max
- Outer Bar Color Series:** #32cd32
- Goal Series:** Ignore this series
- Goal Color Series:** #0e0f0e
- Series Label:** Nothing selected
- Ranking sort field:** Inner Series
- Ranking sort type:** Descending
- X axis label:** X axis label
- Max value to show on X axis:** Max value to show on X axis
- Currency symbol:** User Preference
- Y axis label:** Y axis label
- Display % on right Y axis:** Ignore this option
- Y axis right label:** Y axis right label
- Display Only for Benchmark Record:** Ignore this option
- Display only Calculation Type:** Ignore this option
- Display only "Grouped By" type:** Ignore this option
- Frequency:** Ignore this option

The configuration drawer for wBenchmark Line Chart Dashlet contains the following fields:

Name - By default is "**wBenchmark Bullet Leader Chart Dashlet**" and can be changed by the user. This field should always be populated.

Module - Is a dropdown with all modules of type wBenchmarkTarget that have wBenchmark records created for them. This field needs to be selected first in order to be able to select the series fields.

Inner Bar Series - is a dropdown with all types of fields from the selected wBenchmarkTarget module. This field is required and its value will be displayed on the chart on top of the Outer Bar Series if that is selected.



Inner Bar Color Series - is a color picker with the default value #000080 (blue) and represents the color displayed for each of the Inner Bar Series.

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wBenchmark Bullet Leader Chart Dashlet Cancel Save

Module: Target Module

Inner Bar Series: Invoice Avg Inner Bar Color Series: #000080

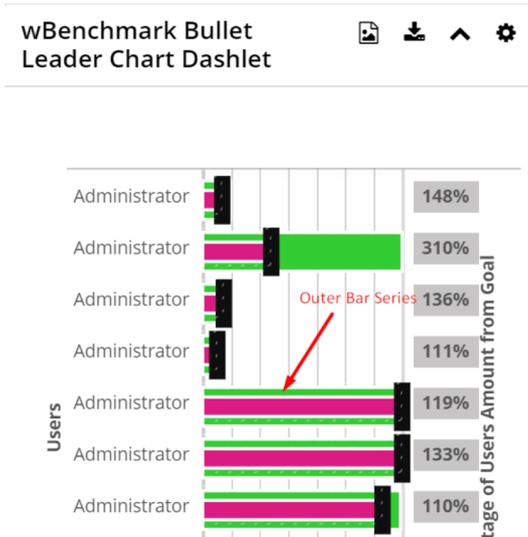
Outer Bar Series: Invoice Max Outer Bar Color Series: #32cd32

Goal Series: Ignore this series Goal Color Series: #0e0f0e

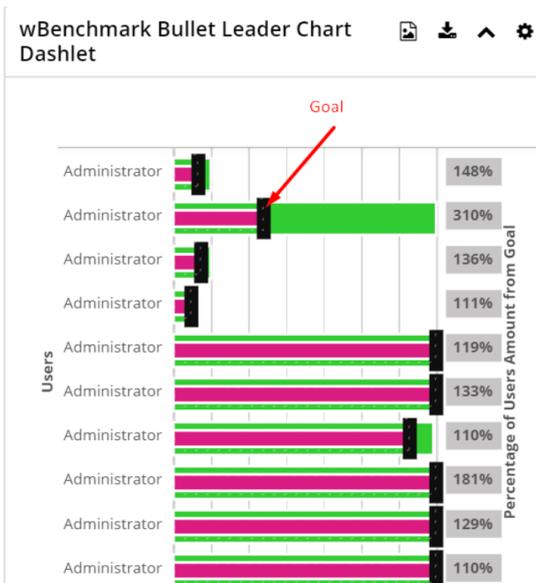
Series Label: Nothing selected Ranking sort field: Inner Series Ranking sort type: Descending

X axis label: X axis label Max value to show on X axis: Max value to show on X axis Currency symbol: User Preference

Outer Bar Series - is a dropdown with all numeric fields (integer, decimal, float, currency) from the selected wBenchmarkTarget module. Its value will be displayed on the chart under Inner Bar Series. This field has the option "Ignore this series".



Goal Series - is a dropdown with all fields from the selected wBenchmarkTarget module. The value of this field represents the value used as the Goal amount and is represented by a vertical line. This field has the option "Ignore this series".



Usually, this field is a calculated field using a formula generated by a wBenchmark Goal Groups record. The creation of the Goal formula will be detailed in the next chapters.

Goal Color Series - is a color picker with the default value #0e0f0e (black) and represents the color displayed for each of the Goal Series.

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wBenchmark Bullet Leader Chart Dashlet Cancel Save

Module
Target Module

Inner Bar Series: Invoice Avg Inner Bar Color Series: #000080

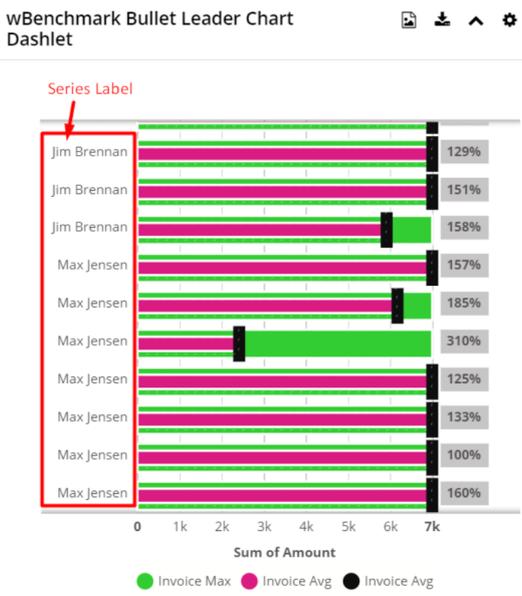
Outer Bar Series: Invoice Max Outer Bar Color Series: #32cd32

Goal Series: Ignore this series Goal Color Series: #0e0f0e

Series Label: Nothing selected Ranking sort field: Inner Series Ranking sort type: Descending

X axis label: X axis label Max value to show on X axis: Max value to show on X axis Currency symbol: User Preference

Series Label - is a dropdown with all fields from the selected wBenchmarkTarget module and represents what is to be used as a Y-axis value. The value of this field will almost always be the **Relate To** (parent_name) field.



Ranking Sort Field - this field represents which series field is to be used as a Y-axis value. This is a dropdown list with the following values:

- 'Inner Series' - the resulting value of the Inner Bar Series
- 'Outer Series' - the resulting value of the Outer Bar Series
- 'Series Label' - the resulting value of the Series Label

Ranking sort type - is a dropdown field and represents the sorting type for the chosen field in the Ranking Sort Field. The default value is set to 'Descending'.

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wBenchmark Bullet Leader Chart Dashlet Cancel Save

Module
Select...

Inner Bar Series: Nothing selected
Inner Bar Color Series: #000080

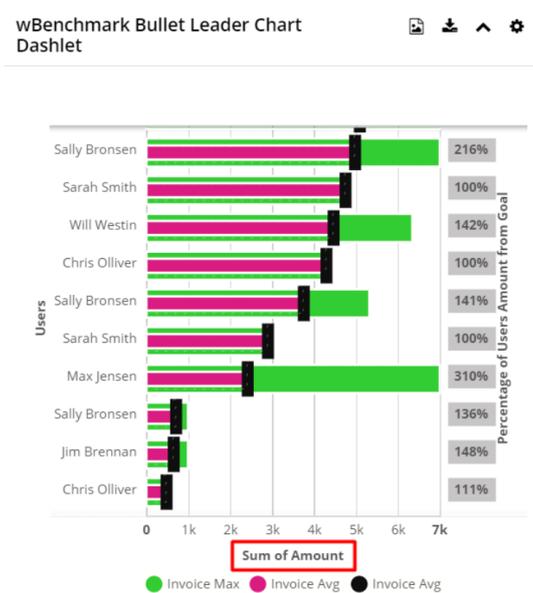
Outer Bar Series: Nothing selected
Outer Bar Color Series: #32cd32

Goal Series: Nothing selected
Goal Color Series: #0e0f0e

Series Label: Nothing selected
Ranking sort field: Inner Series
Ranking sort type: **Descending** (selected), Ascending

X axis label:
X axis label:
Max value to show on X axis:
Max value to show on X axis:

X axis label - what text should be displayed under the X-axis values.



Max value to show on X axis - a number value to use as the farthest right X axis value. Users can use this to determine the white space between the longest bar and the right edge of the chart.

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wBenchmark Bullet Leader Chart Dashlet Cancel Save

Inner Bar Series: Nothing selected Inner Bar Color Series: #000080

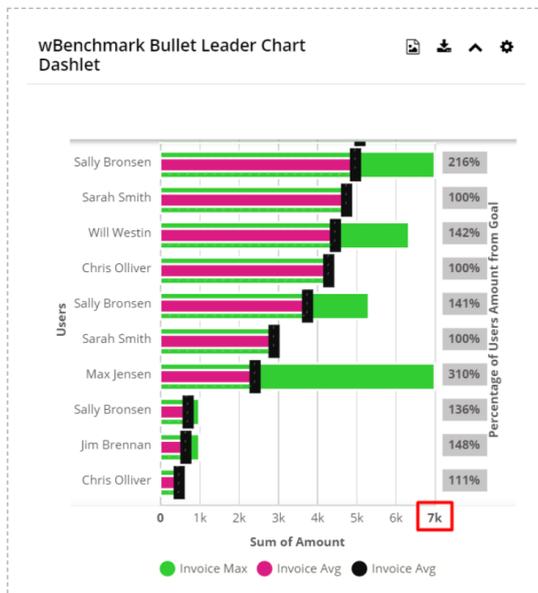
Outer Bar Series: Nothing selected Outer Bar Color Series: #32cd32

Goal Series: Nothing selected Goal Color Series: #0e0f0e

Series Label: Nothing selected Ranking sort field: Inner Series Ranking sort type: Descending

X axis label: Sum of Amount Max value to show on X axis: 700000 Currency symbol: User Preference

Y axis label: Y axis label Display % on right Y axis: Ignore this option Y axis right label: Y axis right label

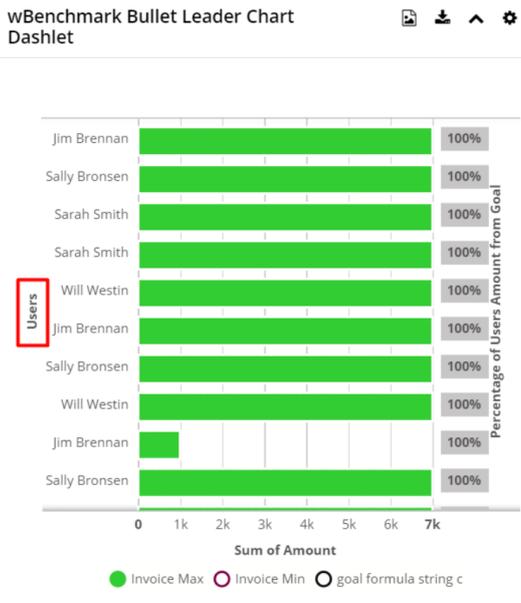


If the User leaves this field blank, the white space needed will be auto calculated.

Display currency symbol - option to display the currency symbol on the tooltip that will pop up on the chart.



Y axis label - what text should be displayed outside the Y-axis values.



Display % on right Y axis - Is a dropdown with the option generated based on the selected series. When this is selected a percentage will be displayed on the right Y axis.



If the following fields are selected on the series fields:

- Inner Bar Series = Sales Amount
- Outer Bar Series = Company Average
- Goal Series = Goal
- The options available on "**Display % on right Y axis**" will be:
- Ignore this option
- Sales Amount / Company Average %
- Sales Amount / Goal %
- Company Average / Sales Amount %
- Company Average / Goal %

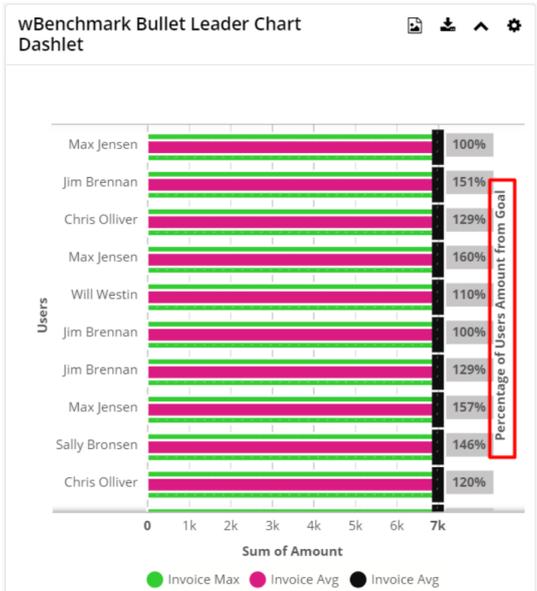
For very big values these are displayed abbreviated:

4 000 000 000 => 4B

2 000 000 => 2M

297 342 => 297K

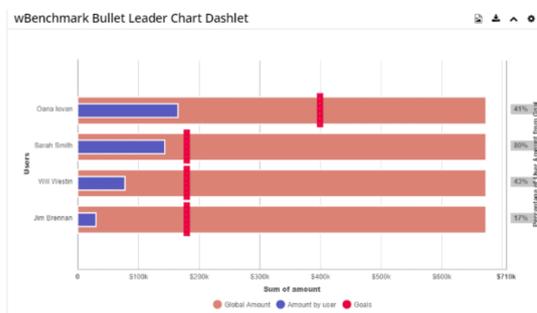
Y axis right label - what text should be displayed outside the right Y axis values. The right Y axis is the Percentages values area.



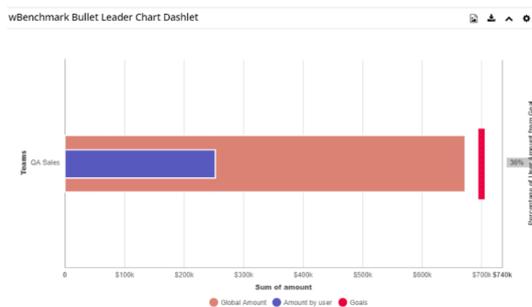
The Y axis right label is not displayed on the chart if the value of the **Display % on the right Y axis** field is set to **Ignore this option**.

Calculated By - is a required dropdown field with the following options:

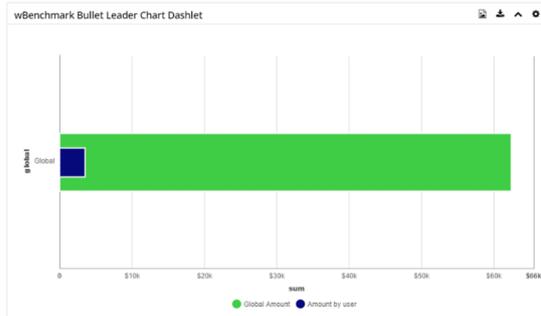
- **Users** - shows on chart the values calculated by users from the selected wBenchmarkTarget module.



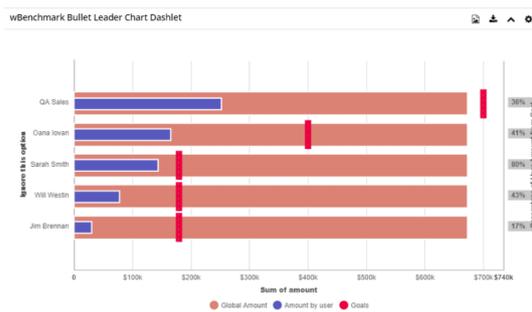
- **Teams** - shows on chart the values calculated by teams from the selected wBenchmarkTarget module.



- **Global** - shows on chart the global values calculated from the selected wBenchmarkTarget module



- **Ignore this option** - shows on chart all the values calculated from the selected wBenchmarkTarget module



Display only Grouped by computations - This field could have four options: User, Module Field, Users & Module Field, and Ignore this option. See that only the selected benchmark grouped by type is available.

Decimal Precision - Display Numbers with decimals number

Decimal Separator - Display Numbers using following decimal separator

Thousand Separator - Display Numbers using following thousand separator

Date Format - When date is displayed use this format to display

Time Format - When time is displayed use this format to display

Week Days And Months Language - Display the Week Days and Months on User Preferred Language

Frequency: - is a required dropdown field with the following options:

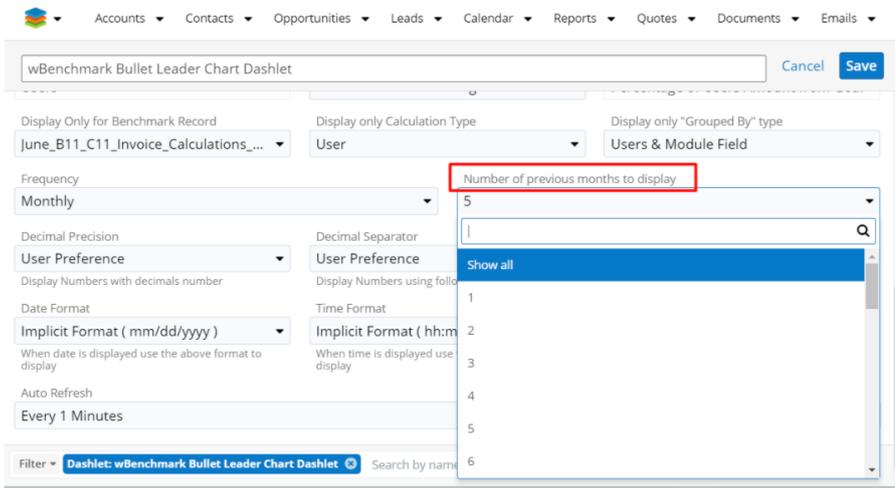
- Daily - shows on chart all the values calculated for days; Frequency is Daily on the records from the selected wBenchmarkTarget module
- Weekly - shows on chart all the values calculated for weeks; Frequency is Weekly on the records from the selected wBenchmarkTarget module
- Monthly - shows on chart all the values calculated for months; Frequency is Monthly on the records from the selected wBenchmarkTarget module
- Quarterly - shows on chart all the values calculated for quarters; Frequency is Quarterly on the records from the selected wBenchmarkTarget module

- is Quarterly for the records from the selected wBenchmarkTarget module
- Yearly - shows on chart all the values calculated for years; Frequency is Yearly on the records from the selected wBenchmarkTarget module
- Ignore this option - shows on chart all the values calculated; shows the records from the selected wBenchmarkTarget module with all types of Frequency

Number of previous days/weeks/months/quarters/years to display -> Has a dynamic label which changes based on the Frequency selected:

- If Frequency is **Daily**, then the label is "**Number of previous days to display**"
- If Frequency is **Weekly**, then it will show "**Number of previous weeks to display**"
- If Frequency is **Monthly**, then it will show "**Number of previous months to display**"
- If Frequency is **Quarterly**, then it will show "**Number of previous quarters to display**"
- If Frequency is **Yearly**, then it will show "**Number of previous years to display**"
- If the value of the **Frequency** field is set to "**Ignore this option**", then the field is not displayed.

If the value selected for the **Number of previous days/weeks/months/quarters/years to display** field is set to **Show All**, all records generated for that Frequency will be represented on the chart.



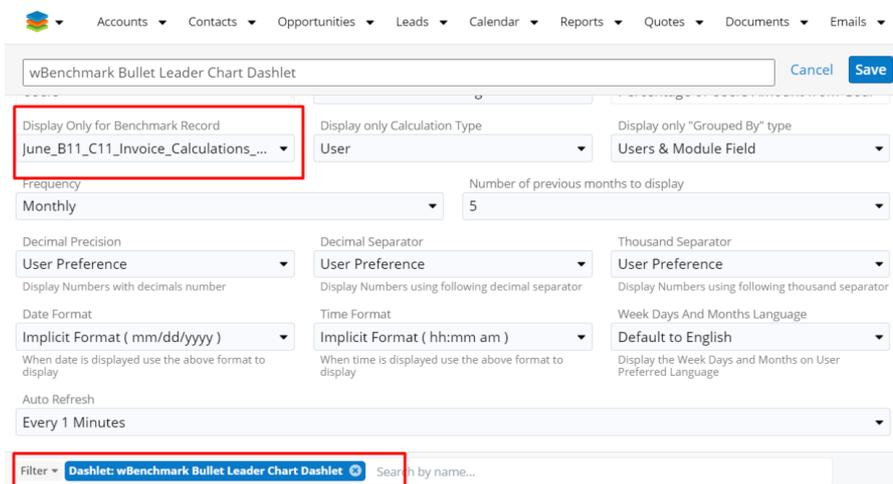
If the value selected for the **Number of previous days/weeks/months/quarters/years to display** field is **1**, then the records generated for the current day/week/month/quarter/year will be represented on the chart.

If the value selected for the **Number of previous days/weeks/months/quarters/years to display field** is **2**, on the chart will be the records generated for the current day / week / month / quarter / year and the records generated for the previous day/week/month/quarter/year.

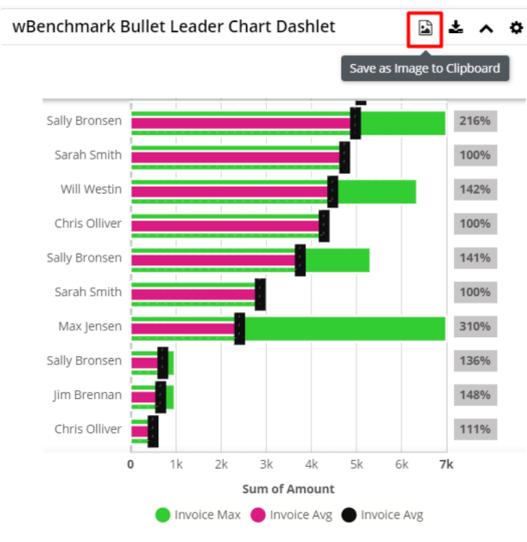
Display Only for Benchmark Record - A dropdown with all records from wBenchmark module. This field is used to filter the records by a wBenchmark record in case the Module selected holds the computed Benchmarks for multiple wBenchmark records.

Auto Refresh - used to determine the refresh rate of the chart.

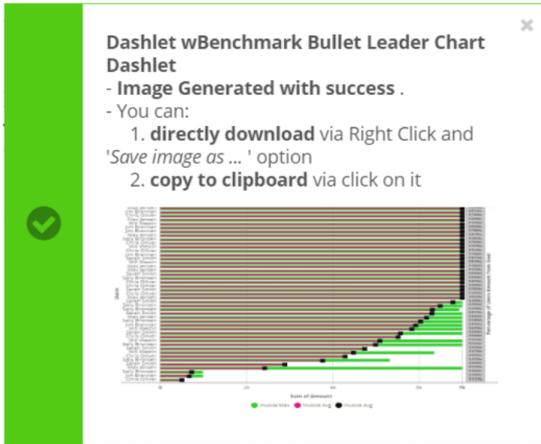
Filter - a filter can be created for wBenchmarkTarget Module records that will be displayed on the chart. This section is populated with the corresponding filters of the target module only after a Module is selected on the dashlet.



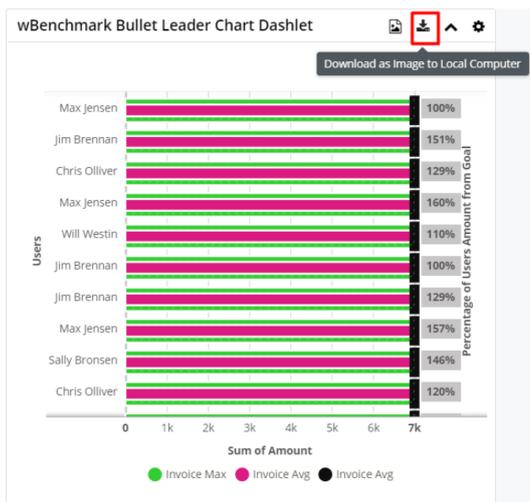
Save as Image to Clipboard - This button is displayed on the dashlet header



When this button is clicked, a popup will appear on the screen with the image of the chart generated. The users can download the image via right click and "**Save image as...**" or they can click on the image in order to copy it on clipboard:



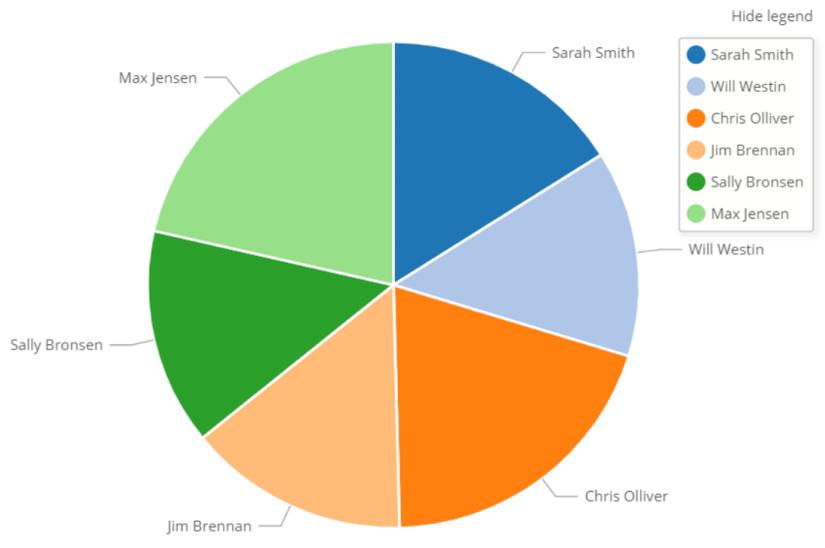
Download as Image to Local Computer - This button displayed on the dashlet header will download the chart as a PNG image.



wBenchmark Pie and Area Chart

The dashlet displays the computed results of the wBenchmark record on a chart.

wBenchmark Pie and Area Chart Dashlet



The configuration drawer for **wBenchmark Pie and Area Chart Dashlet** contains the following fields:

The configuration drawer for the wBenchmark Pie and Area Chart Dashlet is shown. It features a search bar at the top with the text "wBenchmark Pie and Area Chart Dashlet" and buttons for "Cancel" and "Save". Below the search bar are several configuration fields:

- Module:** Target Module (dropdown)
- Display Only for Benchmark Record:** June_B11_C11_Invoice_Calculations_Grouped_by_User (dropdown)
- Display only Calculation type:** User (dropdown)
- Display only "Grouped By" type:** Users & Module Field (dropdown)
- Frequency:** Monthly (dropdown)
- Display Only for Time Period:** All Times (dropdown)
- Label Field:** Related To (dropdown)
- Value Field:** Invoice Avg (dropdown)
- Order by Field:** Invoice Avg (dropdown)
- Order By Direction:** Ascending (dropdown)
- Order Results by:** Order by Field (dropdown)
- Top / Bottom N source:** Order by Field (dropdown)
- Display Top / Bottom N Records:** 0 (input field)
- Group Non Top / Bottom as:** Others O (input field)

Small text below the input fields provides additional context: "Choose from where 'Top / Bottom N' will be calculated", "Display only Top / Bottom N results. If N > 0 we will display the TOP records, otherwise we will display the BOTTOM records. 0 or emotv will disable this", and "Label under which should display results from outside of 'Top / Bottom N'".

Name - is by default "**wBenchmark Line and Area Chart Dashlet**" and can be changed by the user. The Name field should not be empty.

Module - this is a dropdown list that displays all the existing Target Modules.

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wBenchmark Pie and Area Chart Dashlet Cancel Save

Module **Target Module** Display Only for Benchmark Record June_B11_C11_Invoice_Calculations_Grouped_by_User

Display only Calculation type User Display only "Grouped By" type Users & Module Field Frequency Monthly

Display Only for Time Period All Times

Label Field Related To Value Field Invoice Avg

Order by Field Invoice Avg Order By Direction Ascending

Order Results by Top / Bottom N source Order by Field Display Top / Bottom N Records 0 Group Non Top / Bottom as Others O

Choose from where "Top / Bottom N" will be calculated. Display only Top / Bottom N results. If N > 0 we will display the TOP records, otherwise we will display the BOTTOM records. 0 or empty will disable this. Label under which should display results from outside of "Top / Bottom N"

Auto Refresh - Option that will automatically refresh the dashlet at the set interval.

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wBenchmark Pie and Area Chart Dashlet Cancel Save

Order Results by Order Direction

Top / Bottom N source Order by Field Display Top / Bottom N Records 0 Group Non Top / Bottom as Others O

Choose from where "Top / Bottom N" will be calculated. Display only Top / Bottom N results. If N > 0 we will display the TOP records, otherwise we will display the BOTTOM records. 0 or empty will disable this. Label under which should display results from outside of "Top / Bottom N"

Decimal Precision User Preference Decimal Separator User Preference Thousand Separator User Preference

Display Numbers with decimals number. Display Numbers using following decimal separator. Display Numbers using following thousand separator.

Date Format Implicit Format (mm/dd/yyyy) Time Format Implicit Format (hh:mm am) Week Days And Months Language Default to English

When date is displayed use the above format to display. When time is displayed use the above format to display. Display the Week Days and Months on User Preferred Language.

Currency Symbol \$ - USD **Auto Refresh** None

Convert Currencies when available to

Filter Create Search by name...

Display Only for wBenchmark Record - Is a dropdown with all wBenchmark records. The field is not required and if Ignore this Option is selected, then all computed records from the selected Target Module will be displayed on the chart.

Display only Calculation type - Is a required dropdown field that contains the calculations types (Daily, Weekly, Monthly, Quarterly, Yearly) marked with "Yes" on the selected wBenchmark record. Ignore this Option is also available, and if this is selected then all types of calculations will be displayed.

Display only "Grouped By" type - This field could have four options: User, Module Field, Users & Module Field, and Ignore this option. See that only the selected benchmark grouped by type is available.

Display Only for Time Period - Is a dropdown list that will define the period displayed on the chart. The options are: This Week, Last Week, This Month, Last Month, This Quarter, Last Quarter, This Year, Last Year, All Times, Custom Date Range

Label Field - This field defines the label. This will almost always be the **Relate To** (parent_name) field.

Value Field - there are available all fields from the selected Target Module

Currency Symbol - This field displays all system currency values and Convert Currencies when available

Select Order by Field - Order results by the selected field

Select Order By Direction - This field have two options available: Ascending and Descending

Top/Bottom N source - this option allows the user to choose from where "Top / Bottom N" will be calculated

Display Top/Bottom N Records - Display only Top / Bottom N results. If $N > 0$ we will display the TOP records, otherwise we will display the BOTTOM records. 0 or empty will disable this

Group Non Top/Bottom as - label under which should display results from outside of "Top/Bottom N"

Decimal Precision - Display Numbers with decimals number

Decimal Separator - Display Numbers using following decimal separator

Thousand Separator - Display Numbers using following thousand separator

Date Format - When date is displayed use this format to display

Time Format - When time is displayed use this format to display

Week Days And Months Language - Display the Week Days and Months on User Preferred Language

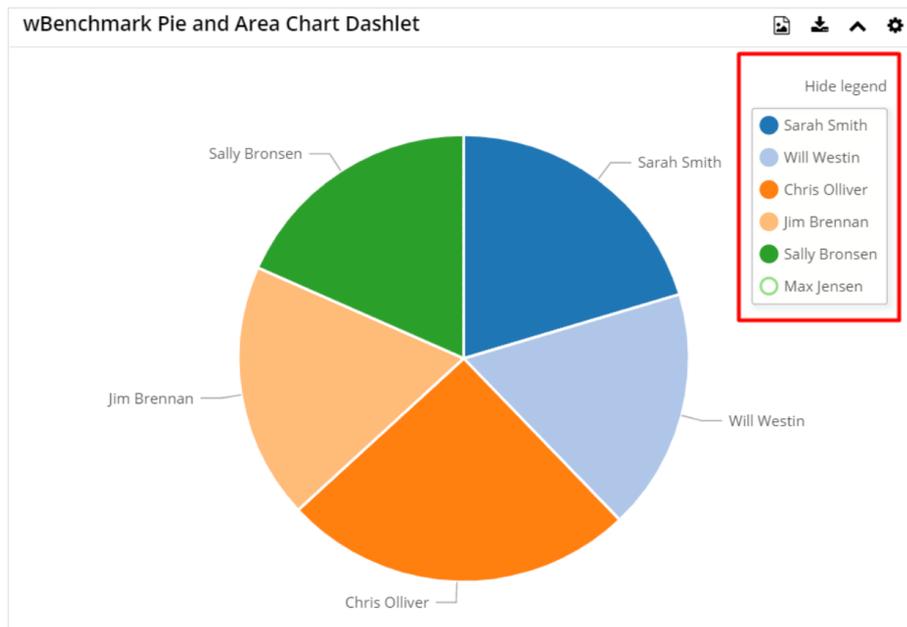
Filter - a filter can be created for wBenchmarkTarget Module records that will be

displayed on the chart. This section is populated with the corresponding filters of the target module only after a Target Module is selected on the dashlet.

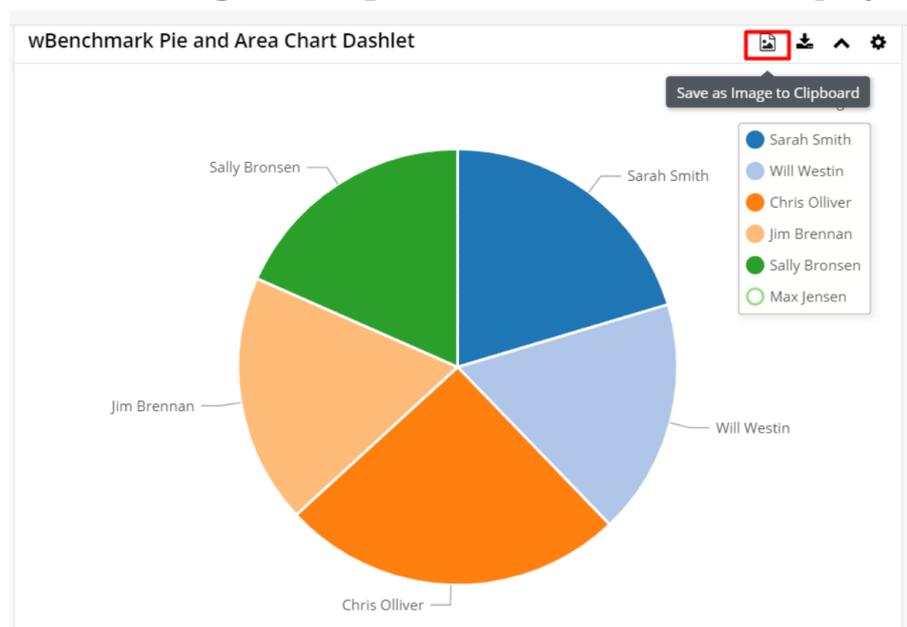
Save - Saves the configurations made for the dashlet

Cancel - The configurations made for the dashlet are canceled

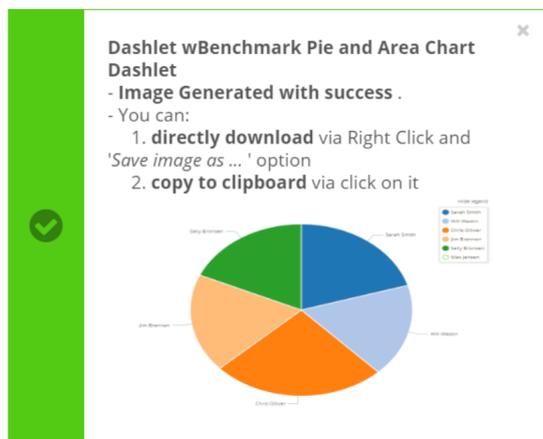
Legend - Users and teams that are represented on the chart can be selected/deselected from the Legend option from the upper right corner of the dashlet.



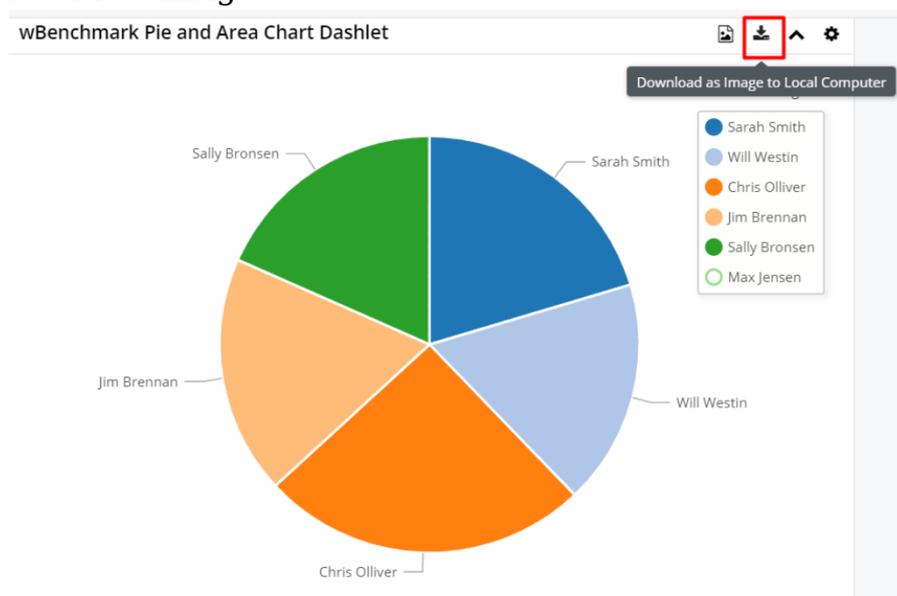
Save as Image to Clipboard - This button is displayed on the dashlet header:



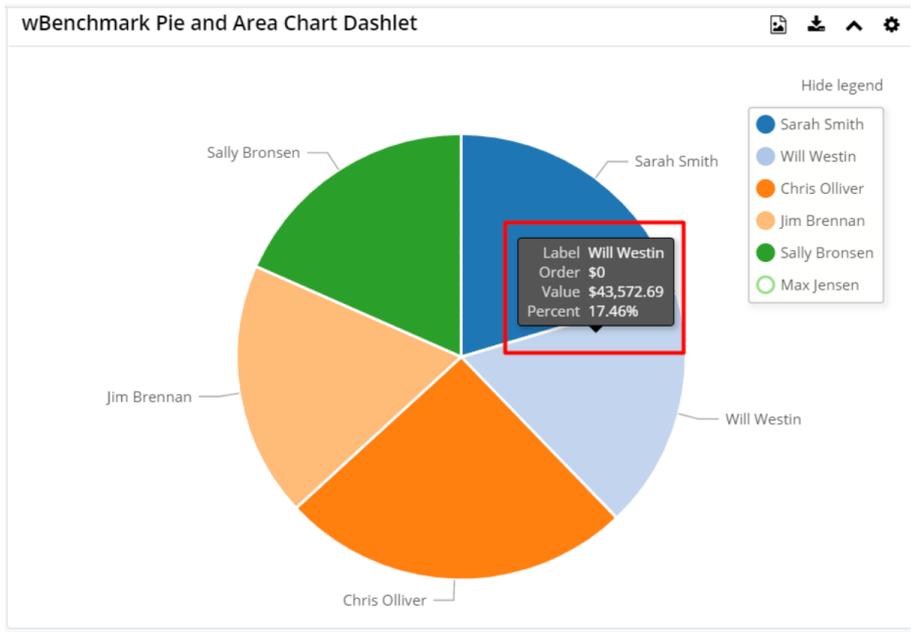
When this button is clicked a popup will appear on the screen with the image of the chart generated. The users can download the image via right click and **"Save image as..."** or can click on the image in order to copy it on clipboard:



Download as Image to Local Computer - This button will download the chart as a PNG image.



The tooltip will display the details on the chart.



The Top/Bottom N Functionality

The **TOP N/BOTTOM N** function sorts the incoming data ascending or descending and then only returns a specific N number of records. Additionally, the records not included in the N number can be grouped together as a summary.

Example 1: Top N

A client wishes to have a pie chart that displays all numbers of the Calls by user, in a given time period. However, the users have too many calls that can be easily displayed on a pie chart. The chart either is unreadable or won't display at all. Instead, the pie chart would be based on this result set and display the "top 3" Users with the bigger number of Calls. All other records would be grouped in an "Others" category.

Target Module (6)

Filter ▼ Create 🔍 Search by name...

Benchmark Name ✕ ▼ is any of ▼ Count Calls 🔍

Frequency ✕ ▼ is any of ▼ Weekly 🔍

Results for Metric "Count Calls"

<input type="checkbox"/>	<input type="checkbox"/>	Name	Related To	count	Start Date	End Date
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Count Calls - User #Max Jensen - Weekly - 2019-08-25 - Group #None	Max Jensen	13	08/25/2019	08/31/2019
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Count Calls - User #Sarah Smith - Weekly - 2019-08-25 - Group #None	Sarah Smith	11	08/25/2019	08/31/2019
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Count Calls - User #Chris Olliver - Weekly - 2019-08-25 - Group #None	Chris Olliver	8	08/25/2019	08/31/2019
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Count Calls - User #Jim Brennan - Weekly - 2019-08-25 - Group #None	Jim Brennan	5	08/25/2019	08/31/2019
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Count Calls - User #Oana Lusca - Weekly - 2019-08-25 - Group #None	Oana Lusca	5	08/25/2019	08/31/2019
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Count Calls - User #Will Westin - Weekly - 2019-08-25 - Group #None	Will Westin	4	08/25/2019	08/31/2019

Top 3 (blue arrow pointing to count 13)

Bottom 3 (green arrow pointing to count 4)

In the above case the **Top/Bottom N Source** is created by "**Order by Field = count**", and only the first three Users are displayed, all the other results being grouped as "Others":

wBenchmark Pie and Area Chart Dashlet - this month Cancel Save

Module
Target Module

Display Only for Benchmark Record
Count Calls

Display only Calculation type
Weekly

Display only "Grouped By" type
Users

Display Only for Time Period
Custom Date Range

Start Date
08/10/2019

End Date
08/17/2019

Label Field
Assigned to

Value Field
count

Order by Field
count

Order By Direction
Descending

Order Direction

Order Results by

Top / Bottom N source
Order by Field

Display Top / Bottom N Records
3

Group Non Top / Bottom as
Others

Choose from where "Top / Bottom N" will be calculated

Display only Top / Bottom N results. If N > 0 we will display the TOP records, otherwise we will display the BOTTOM records. 0 or empty will disable this

Label under which should display results from outside of "Top / Bottom N"

Decimal Precision
User Preference

Decimal Separator
User Preference

Thousand Separator
User Preference

Display Numbers with decimals number

Display Numbers using following decimal separator

Display Numbers using following thousand separator

Date Format
Implicit Format (mm/dd/yyyy)

Time Format
Implicit Format (hh:mm am)

Week Days And Months Language
Default to English

When date is displayed use the above format to display

When time is displayed use the above format to display

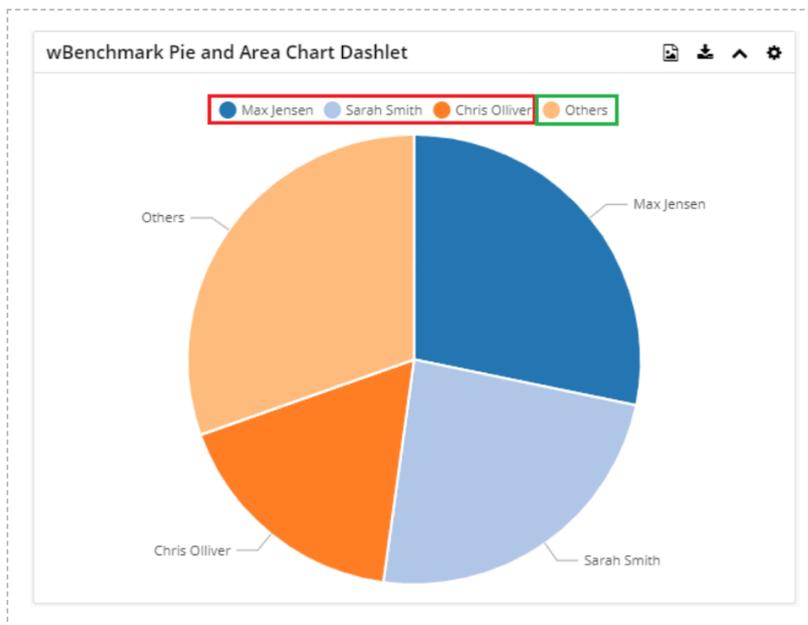
Display the Week Days and Months on User Preferred Language

Currency Symbol
User Preference

Auto Refresh
None

Convert Currencies when available to

Filter Create Search by name...



Example 2: Bottom N

A client wishes to have a pie chart that displays all numbers of the Calls by user, in a given time period. However, the users have too many calls that can be easily displayed on a pie chart. The chart either is unreadable or won't display at all. Instead, the pie chart would be based on this result set and display the "bottom 3" Users with the lower number of Calls. All other records would be grouped in an "Others" category.

Top / Bottom N source

Order by Field

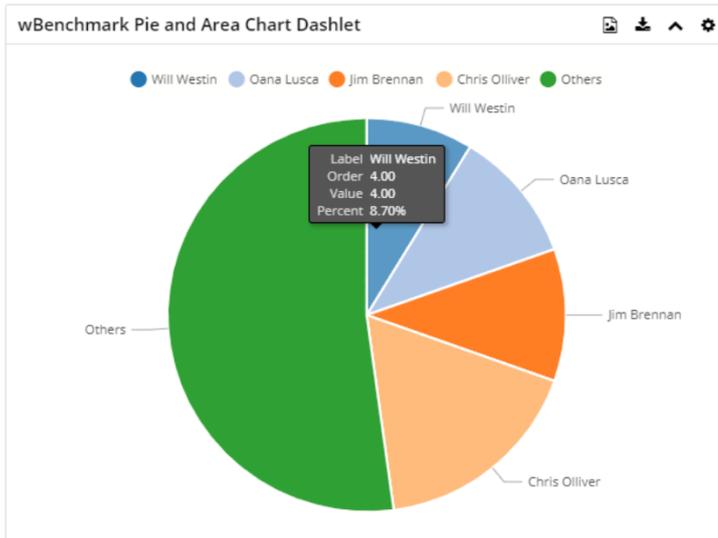
Choose from where "Top / Bottom N" will be calculated

Display Top / Bottom N Records

-3

Display only Top / Bottom N results. If N > 0 we will display the TOP records, otherwise we will display the BOTTOM records. 0 or empty will disable this

Note: When a negative value is used for the 'Display Top/Bottom N Records' field then, only the bottom record will be displayed.



Example 3: Disable the Top/Bottom N functionality

If the user needs to disable the Display Top/Bottom N Functionality, then the field Display Top / Bottom N Records = 0 or Top/Bottom N source = Don't Use Top/Bottom Functionality.

Label Field: Assigned to

Value Field: count

Order by Field: count

Order Results by:

Order By Direction: Ascending

Order Direction:

Top / Bottom N source: Order by Field

Please Select Top / Bottom N source

Don't use Top / Bottom functionality

Label Field:

Value Field:

Order by Field:

User Preference

Convert Currencies when available to:

Display Top / Bottom N Records: 0

Display only Top / Bottom N results. If N > 0 we will display the TOP records, otherwise we will display the BOTTOM records. 0 or empty will disable this

Decimal Separator: User Preference

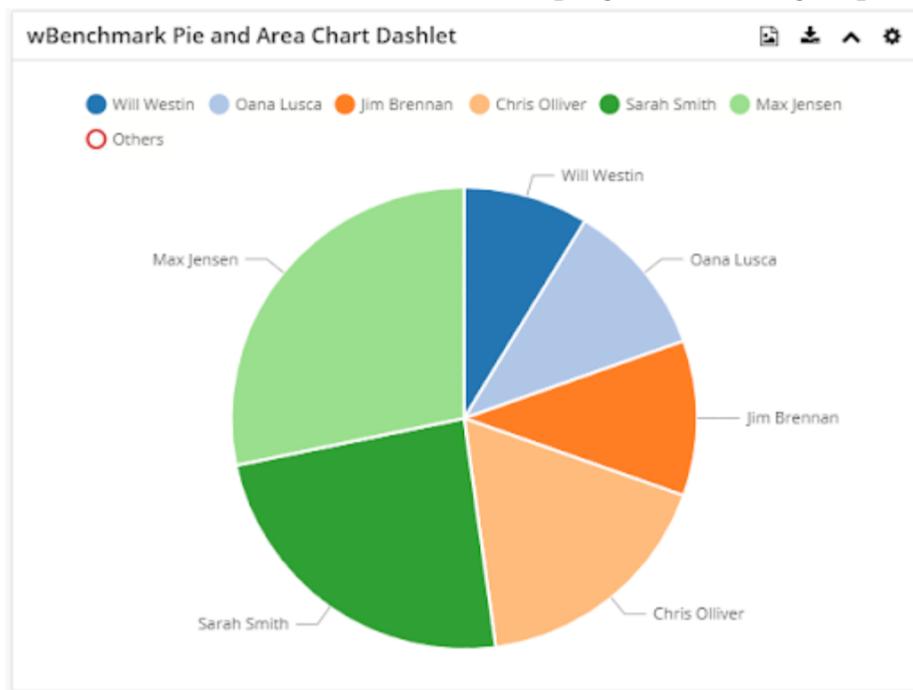
Display Numbers using following decimal separator:

Time Format: Implicit Format (hh:mm am)

When time is displayed use the above format to display:

Auto Refresh: None

In this case all records will be displayed, not only top or bottom.



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