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 <u>W-Systems Product Installation Guide</u>.

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 <u>W-Systems Supported Platforms</u> 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.
- <u>Goal Import Tool</u>: 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.
- <u>Time Series Visualization</u>: 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 <u>Create Destination Module of wBenchmarkTarget type</u>.

- <u>Global Configurations</u>
- <u>Deduplication</u>
- <u>Recalculate a Benchmark Definition</u>



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.

wBenchmark Global G	Configurations				Go To 👻	Cancel	Save
Scheduler Configuration Default Crono Job Interval min 5	hrs 4	date 3		mo 2	day 1		
Error							•
Job Execution Concurrency Lir	mits		Job Execution P	ostpone time			
1 running job per record		-	300				

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



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

Job Execution Concurrency Limits				
1 running job per record 🔹				
No Limit				
1 running job per record				
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	
300	

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	
Weekly	
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.



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

ports	
Main Connection	
Reports	
Listviews	

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.

l	Used DB Connection	ns
4	Schedulers	
	Reports	•
	Dashlets	
	Listviews	•
	Main Connection	
	Reports	
	Listviews	

Save Computed Value

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

Save Computed Values	
Trigger Logic Hooks	
Always	▼
Save "No Value" Computations	
Never	•

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)
 - $\circ~{\bf Never}~$ The save of the destination bean is performed with a custom save functionality and the logic hooks will not be triggered.

	Save Computed Values
[Trigger Logic Hooks
	Always 🗸
	Always
	Never

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.
 - $\circ~$ 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

 Image: Global Configurations
 Choose default values for various settings

 Image: 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.



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:

wBenchmark Deduplication		
wBenchmark Name		
B7_C7_ wbenchmark Acc by Users and System/	Global	
Select Computation Type		
Yearly		
Records Created From Date		
03/01/2019		÷
Check For Duplicate Records		
	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.

ords Created To	Date							
/01/2020								
							📋 Dedu	plicate
	De	ates		Per	riod Info	 	 📋 Dedu	plicate

Recalculate a Benchmark Definition

wBenchmark

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.

Perform the needed configurations for	r wBenchmark		
Global Configurations	Choose default values for various settings	Recalculate a Benchmark Definition	Recalculate a Benchmark Definition for a selected Period
Deduplication	Deduplicate the computed values for a Benchmark Definition		

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

📚 🕶 Accounts 👻 Contacts 👻 Opportur	iities 👻 Leads 💌	Calendar 🔻	Reports 👻	Quotes 🔻	Administration
Recalculate wBenchmark for Date(s)				Go	To - Cancel
Interval for Perform the Actions					
Start Date	End	d Date			
(Required) mm/dd/yyyy	I (F	equired) mm/	dd/yyyy		
Record to Perform Actions on					
Action Parameters					
Available Actions					

Here, users can set up the following:

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

Interval for Perform the Actions	
Record to Perform Actions on wBenchmark Name	
Required	•
Action Parameters	
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.

Recalculate wBenchmark for Date(s)		Go To 👻	Cancel
Interval for Perform the Actions			
Start Date	End Date		
(Required) mm/dd/yyyy	(Required) mm/dd/yyyy		

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?	Queue the computation?
Yes	Yes 🗸
Take date created on consideration when compute?	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 R	ecalculate Process	
No		-
Yes	7	
No		
wanable /	terions	

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.



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

Cancel Queued Recalculations	Watch Queued Recalculations Status	 Recalculate
------------------------------	------------------------------------	---------------------------------

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

vailable Actions		
â 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 mod	dule 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
Norkflow Management	Manage workflow conditions, alerts and actions

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



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.

	Save	Duplicate	View Fields	View Relationships	View Layouts	View Mobile Layouts	Delet
Package	wBench	mark_QA		-			
Module Name	wBencl	hmark_QA					
* Plural Labe	wBencl	hmark_QA					
Singular Labe	wBencl	hmark_QA					
Allow Imports Team Security Navigation Tab * Type							

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



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

Package	ider s wPanahmark OA		
	ider > wBenchmark_QA		
	Save Duplicate Deploy	Publish Export Dele	ete
Last Modified:	020-02-14 08:36		
Package Name:	vBenchmark QA		
Author:	-		
* Kov	nana		
Description:	naqa		
			/
1	Readme		
Madulaat			
modules:			
	New Module wBenchmark_Q	A	

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.

Search						
🗲 🛍 Studio > wBe	nchmark_QA > Layo	outs > Search				
Save & Deploy	View History	Restore Default Layout				
Default					Hidden	
Name			 	Ш	Date Created	0
[name]				Ш	[date_entered]	
Benchmark Name			0	Ш	Date Modified	0
[metric_name]				Ш	[date_modified]	
Advanced Related	То		0	Ш	Modified By	\checkmark
[related_to_for_filter]				Ш	[modified_by_name]	
Calculated By			0	Ш	Created By	Ø
[calculated_by]			_	Ш	[created_by_name]	
Grouping Type			0	Ш	Description	\bigotimes
[grouping_type]			_	Ш	[description]	
Frequency			0	Ш	Archived	$\overline{\diamond}$
[calculation_type]			_	Ш	[archived]	
Month			0	Ш	Number of distinct Linked Teams	$\overline{\checkmark}$
[month_identif]			_		[counter_teams]	
Week			0		Number of distinct Linked Users	$\overline{\checkmark}$
[week_identif]			_		[counter_users]	

Save and Deploy your changes.

Using the wBenchmark Module

- <u>Target Module</u>
- <u>wBenchmark Buttons</u>
- Examples of wBenchmark Records

- <u>Goals</u>
- <u>wBenchmark Dashlets</u>

Target Module

Target Modules have the following default fields:

Fields			
🗲 🛍 Module Builder >	Target_Module > Fields		
Add Field Edit Labels			
Name	Display Label	⇒ Type	
parent_name	Related To	Parent	4
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 Inc	lucInteger	
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	-
4			

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.

 ${\bf Teams}\,$ - 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.

moaules	Edit Fields		
🗄 🧰 Bugs	counter_teams	Number of distinct Linked Teams	Integer
- 🔁 Calls	counter_users	Number of distinct Linked Users	Integer
🖣 🛅 Campaigns *	counter_users_total	Number of distinct Linked Users Incl	uc Integer
🗉 🧰 Cases	grouped_by_label	Grouped By Display Value	Wsys_wm_group_b
ColumnSet Configurations	* w_textfield_c	w textfield	TextField
	* w_address_street_c	w address street	TextArea
	* w_address_city_c	w address city	TextField
	* w_address_state_c	w address state	TextField
tini Data Privacy	* w_address_postalcode	_(w address postalcode	TextField
▪ 🚞 Documents *	* w_address_country_c	w address country	TextField
🗉 🚞 DocuSign Envelopes	* w_checkbox_c	w checkbox	Checkbox
🗖 🚞 DocuSign Notes	* w_currency_c	w currency	Currency
🖳 🧰 Dropbox	* w_date_c	w date	Date
Employees *	* w_datetime_c	w datetime	Datetime
	* w_decimal_c	w decimal	Decimal
	* w_dropdown_c	w dropdown	DropDown
	* w_float_c	w float	Float
Meetings	* w_integer_c	w integer	Integer
🗄 🛅 Notes	* w_phone_c	w phone	Phone
🗄 🚞 Opportunities	* base_rate	Base Rate	Decimal
	•)

Custom Target Module Filter

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

📚 -	Accounts 👻	Contacts	Opportunities	Leads 🔻 Ca	alenda	r 🔻 Reports 🖣	Quotes 🔻	Targe	t Mod
Target	Module (20 of	21+)						Crea	ate
Filter 💌	Create 🙁 Search I	by name					0	■	0
Advance	d Related To	× •	Select	•				-	+
Results fo	or Metric "test2"		Selected User(s)	^			Reset Cancel	Save	-
•	Name 🔶	Benchmark	Selected Team(s) Users from Selected Te	am(s)	¢	End Date 🔶	Grouped By So	• •	¢
□ ☆	test1 - User #C	test1	My Team(s)			12/31/2020		۲	•
□ ☆	test1 - User #Ji	test1	Users from My Team(s)			12/31/2020		۲	•
□ ☆	test1 - User #	test1	MySelf			12/31/2020		۲	•
□ ☆	test1 - User #S	test1	User I Report To	-		12/31/2020		۲	•
□ ☆	test1 - User #S	test1	Sarah Smith	01/01/2020		12/31/2020		۲	•
□ ☆	test1 - User #	test1	Will Westin	01/01/2020		12/31/2020		۲	•
□ ☆	test1 - User #C	test1	Chris Olliver	04/01/2020		06/30/2020		۲	•
4	1								-

If a filter is created for 'Advanced Related \mathbf{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:

😝 🕶 Accounts 👻 Contacts 👻	Opportunities 👻 Le	eads 🔻 Calendar 🔹	Reports ▼	Quotes 🔻	wBenchmark
Name					_
wB Required				Cance	el Save
General Definitions Retention					
Automatic Computation Status		Target Module			
Active	-	Required			•
Enable or Disable Benchmark Computation		Module where the com to Sugar Module Builde wBenchmark template.	putations will be sa r and build a new n	ved. To create a n nodule based on	module, go the
Group By Users		Module Field			
Having this option checked should enable the calc metrics and Team metrics (basically no user filter, and per team metrics)	ulation of Global per instance metrics	Having this option chec module and a custom fi clause.	ked should allow th eld which would be	e user to pick a c come an additio	ustom nal Group By
Create metrics for Users	Teams		System/Global		
Calculate a value for each linked user	Calculate a total value fo	or each linked team	Calculate a globa definition	l / system wide v	alue for each

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 **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.

😂 ▾ Accounts ▾ Contacts ▾	Opportunities 🔻	Leads 🔻 Calendar		uotes 🔻 wBenchma	
Name					
wB Required				Cancel Save	
General Definitions Retention					
Automatic Computation Status		Target Module			
Active	-	Required			
nable or Disable Benchmark Computation		Module where the con to Sugar Module Build wBenchmark templat	nputations will be saved. ler and build a new modu e.	To create a module, go le based on the	
Group By Jsers		Module Field			
2					
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)		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.			
Freate metrics for	Tooms		System/Global		
2					
Calculate a value for each linked user	Calculate a total value	for each linked team	Calculate a global / sy definition	stem wide value for each	

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.

📚 🕶 Accounts 👻 Contacts 👻 Opportuniti	es 🔹 Leads 👻 Calendar 👻 Reports 👻 Quotes 👻 wBenchmark
Name	
WB Required	Cancel Save
General Definitions Retention	
Automatic Computation Status	Target Module
Active	✓ Required ✓
Enable or Disable Benchmark Computation	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	Module Field
Having this option checked should enable the calculation of Glo metrics and Team metrics (basically no user filter, per instance and per team metrics)	bal Having this option checked should allow the user to pick a custom metrics module and a custom field which would become an additional Group By clause.
Group By Module	Group By Field
Required	 Nothing selected
Group by Source Module	Group by Source Field

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

 ${\bf Group}\ {\bf By}\ {\bf 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:

 ${\bf Users}\,$ - 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.

 ${\bf System/Global}~$ - 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:

Name	
wB 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 guarters	
4	
How many previous quarters should be kept in addition to the current one	
Delete yearly metrics older than X years	
3	
-	

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**.



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:

Select	×	Select	×
Bool	^	auto_invite_parent	^
Deleted		Following	
Reminders		Favorite	
Email Reminder		Int	
Email reminder sent		Duration Hours	
Send Invites		Repeat Interval	
auto_invite_parent	-	Repeat Occurrences	
Reminders	•	Reminders	•

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
- ${\bf COPY}$ 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:

WB WBe	This field controls record-ownership	o: Manage Stud	lio Fields	🕞 Run Sc	heduler Now	+ Generat	e Scheduler	Car
CALLS [# 1 Ex	ample:	LBL_W_CH	ECKBOX fro	m 🔟 Tai	get Module = SU	JM() filtered	by My Calls	-
Definition # 1 D a red	Choosing 'Assigned To' will create metric which counts how many cords a User is assigned to.	ed as SUM of	(reminder_o	checked) f	rom 🗿 Calls	filtered by M	ly Calls	
saved on field me isplay Name red	Choosing ' Created By ' will create a fr etric which counts how many cords a user has created.	om 🔟 Target	Module					
Definition #1 Hit elect Operation (\ wa	n t: Jse 'Ignore ' if you wish to have a item-wide metric, for example if you it to generate a metric record ¹⁹	data)						
Sum wt ma bu co	ich has a Definition that counts how my Opportunities are in the system, t also another Definition which unts how many records this							•
lect Source Field the	rticular User has assigned to them, ereby allowing you to report on the		Select Desti	ination Field	where to store th	ne result)		
Reminders nu sid	mbers, or use in dashlets, side-by- e.	-	LBL_W_C	HECKBOX				•
ser field used to grou	o records (optional)		Date field u	ised to limit r	ecord selection to	o evaluated time	e period (option	nal)
Assigned to		-	Start Dat	e				-

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:

Select	×
[
Ignore Date Field	A
Datetime	
Repeat Until	
Date Created	
Date Modified	
Recurrence ID of call. Original call start date	
Start Date	-
Start Date	•

A Tooltip is available for this field:

📚 🕶 Accounts 🕶 Contacts 🕶 Opportunities 🕶	Leads Calendar Reports Quotes WBenchma
Name WB Image WBe Image Image Image Image <t< th=""><th>nage Studio Fields 💿 Run Scheduler Now 🗕 🕈 Generate S</th></t<>	nage Studio Fields 💿 Run Scheduler Now 🗕 🕈 Generate S
Display Name	
Definition #1	
Select Operation (what operation we should do with source data) Sum Select Source Field (from where we get data)	Quick Tips: - To SUM opportunity records created in the current selected metric time periods' select 'Date Select Desting' Created'.
Reminders •	LBL_W_CHE - 10 SOM all opportunity records
User field used to group records (optional)	Date field used to limit record selection to evaluated time period (optional)
	Start Date

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:

- <u>Manage Goals</u>
- <u>Manage Studio Fields</u>
- Run Scheduler Now
- Generate Scheduler
- Configure Scheduler
- Enable Scheduler
- Edit

WB Image Goals Image Goals <td< th=""></td<>
General Definitions Retention Target Module: M Target Module - Total Number of wBenchmark Defined: #1 of maximum 15 Source Module Create Definition #1 of maximum 15
Target Module: 1 Target Module - Total Number of wBenchmark Defined: #1 of maximum 13 Source Module Create Definition
CALLS [# 1]: LBL_W_CHECKBOX from 🗊 Target Module = SUM () filtered by My Calls –
Definition #1 Displayed as Definition #1 and calculated as SUM of (reminder_checked) from 🚺 Calls filtered by My Calls saved on field LBL_W_CHECKBOX (w_checkbox,c) from 🔞 Target Module
Display Name

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 <u>Creating Goals</u> 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**.

anage Studio Fields					Cance	Close and Reload the metada
odules	Edit Fields					>
Accounts	🔶 🗲 🛍 Studio > Targe	t Module > Fields			^	The Fields that are available for the me are listed here by Field Name.
Calls	Add Field Edit Labe	is			- 1	To configure the properties for a field, of the Field Name.
Campaigns -	Name	Display Label	 Type 	4		To create a new field, click Add Field.
_ Cases	name	Name	Name	-		label along with the other properties of
ColumnSet_Configurations	date entered	Date Created	Datetime			clicking the Field Name.
Contacts	date_modified	Date Modified	Datetime			After the methods is deployed the new
Contracts	description	Description	TextArea			After the module is deployed, the new created in Module Builder are regarded
Data Privacy	deleted	Deleted	Checkhor			standard fields in the deployed module
Documents *	celeted	Deleted To	Decent			Studio.
DocuSign Envelopes	parent_name	Related to	Parent			
DocuSign Notes	calculation_type	Calendariant Day	DropDown			
Dropbox	calculated_by	Calculated By	DropDown			
Employees *	grouping_type	Grouping Type	DropDown			
Knowledge Base	period_start_date	Start Date	Date			
Logda	penod_end_date	End Date	Date			
Leads	week_identif	Week	Integer			
Meetings	month_identif	Month	Integer		-	

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.

睾 -	Accounts		Opportunities 👻	Leads	• (Calendar	 Repo 	rts 🖣	Quotes	• •	wBenchmark 🝷	1	Search	۹	20 +	2 -	· +
wB	wBenchn	nark_Test 🌣		<	>	📰 Man	nage Goal	s	o: Manage S	itudio	o Fields 💿 R	tun Schedu	ler Now	+ Generate S	heduler:	Edit	•
General	Definitions	Retention															
Target Mo	odule: ₥	Target Module	- Total Number o	of wBend	hmai	rk Defin	ed: #1 of	maxir	num 15 + Create	Definit	tion						

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.

Сору

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.

- 🥩	Accounts 🔻	Contacts 👻 Op	oportunities 🔻	Leads 🔻	Calendar 👻 wBench	mark •	Search		Q	20 +	2	• +
wBench	mark (3)								Manag	ge Goal	s Cr	reate
Filter 👻 Cre	search by n	ame									2	III 0
	Name 🌩	Automatic Co 🖨	Target Module	\$	Perform Computation	¢	Group By	¢	Create	metrics f	or	٥
□ ☆ v	wBenchmark_T	Active	Target Module		X Not Generated]	Users		Users	Teams	Syste	• •
□ ☆ t	test2	Active	Target Module		Run Now		Users		Users	Teams	Syste	۰ -
□ ☆ t	test1	Active	Target Module		Run Now		Users		Users	Teams	Syste	• •

Manually run

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

```
<instance_url>/index.php?entryPoint=wMetricCronoEntryPoint&cronoIDS=<Sch
eduledJobID>&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

-	Accounts 🝷	Contacts Op	oportunities 👻 Le	eads 🔻 🤇	Calendar 👻 Reports 👻	Quotes 👻 wBen	chmark 👻 🚦	Search	۹ (• 🧟 -
wBenchm	nark (1)								Manage	Goals
ilter 🔻 Crea	te 🕴 Search I	by name								2
lly Favorites			-							-
nter new filt	ter name								Reset	Cancel Sav
) – Na	ame 🗢	Automatic Co 🖨	Group By	¢	Create metrics for	Calculate daily 🜩	Calculate week♦	Calculate mont\$	Calculate quar 🖨	Calculate year
) ★ 🗤	Benchmark	Active	Users		Users Teams System/Glob	a Yes	Yes	Yes	Yes	Yes

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

Name					
WB Accounts_By_U	Jser				Cancel Save
General Definitions Ret	ention				
Automatic Computation Stat	tus		Target Module		
Active		-	Target Module	e	•
nable or Disable Benchmark (Computation		Module where the Module Builder an	e computations will be saved nd build a new module base	d. To create a module, go to Sugar d on the wBenchmark template.
Group By Jsers			Module Field		
2					
Having this option checked sho Feam metrics (basically no use	ould enable the calculation or filter, per instance metrics	of Global metrics and and per team metrics)	Having this option custom field whic	n checked should allow the u h would become an addition	user to pick a custom module and a nal Group By clause.
Create metrics for					
Jsers		Teams		System/Global	
2					
alculate a value for each linke	d user	Calculate a total value for	each linked team	Calculate a glob definition	al / system wide value for each
alculate For	147	Mar and			M
Jay	Week	Month	Qu	uarter	Year
_					
2					0

Ensure to also add the attached users and teams.

- 🥩	Accounts 👻 Co	ontacts - Opportun	ities 🕶 Leads 💌	Calendar	 wBench 	mark 👻	Searc	h	۹	20+	न्न -	+
wB	Acco ம்	< 🗲 📰 Mana	ge Goals 🛛 😋 Mana	age Studio	Fields) Run Schee	duler No	w + Generat	e Scl	neduler	Edit	•
Us USE	RS (3)										+	•
	Full Name	User Name 🜲	Title \$	Departme	ent ¢	Email Addre	SS	Office Phone	\$	Status		
	Will Westin	will	Sales Manager East			will@exam	ple.com			Active		3
	Sarah Smith	sarah	Sales Manager West			sarah@exa	mple.c			Active		3
	Chris Olliver	chris	Senior Account Rep			chris@exar	nple.c			Active		3
Te TEA	MS (1)										+	•
	Team Name			\$	Date Modifi	ed						
☆	Romania				06/18/2020	10:08am					۲	•

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

WB Accounts By User		Cancel Sav
General Definitions Retention		
arget Module: 🔟 Target Module - Total Number of w	Benchmark Defined: #1 of maximum 16	
ource Module		
Accounts	Create Definition	
ACCOUNTS [# 1]:	Proposal Role from 📆 Target Module = SQ	QL (Raw SQL) filtered by All Accounts
Definition #1 Displayed as SQL Calc and calculated as SQL	of Raw SQL (Raw SQL) from 🔉 Accounts filtered by All Accounts saved on field Pro	oposal Role (proposal_role_c) from
Target Module		
isplay Name		
ispidy norme		
SQL Calc		
SQL Calc elect Operation (what operation we should do with source data)		
SQL Calc elect Operation (what operation we should do with source data) SQL Calculation		-
SQL Calc elect Operation (what operation we should do with source data) SQL Calculation		
SQL Calc elect Operation (what operation we should do with source data) SQL Calculation aw SQL Operation	Select Destination Field (where to store the result)	
SQL Calc elect Operation (what operation we should do with source data) SQL Calculation aw SQL Operation 'Proposal: Assigned To User'	Select Destination Field (where to store the result) Proposal Role	-
SQL Calc elect Operation (what operation we should do with source data) SQL Calculation aw SQL Operation 'Proposal: Assigned To User'	Select Destination Field (where to store the result) Proposal Role	
SQL Calc elect Operation (what operation we should do with source data) SQL Calculation aw SQL Operation 'Proposal: Assigned To User'	Select Destination Field (where to store the result) Proposal Role	
SQL Calc elect Operation (what operation we should do with source data) SQL Calculation aw SQL Operation 'Proposal: Assigned To User'	Select Destination Field (where to store the result) Proposal Role Date field used to limit record selection to evaluated time	• period (optional)
SQL Calc elect Operation (what operation we should do with source data) SQL Calculation aw SQL Operation Proposal: Assigned To User' er field used to group records (optional) Assigned to	Select Destination Field (where to store the result) Proposal Role Date field used to limit record selection to evaluated time Ignore Date Field	- period (optional)

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

- 🥪	Accounts		acts 🔻	Opportunities	•
wB	Accou	☆	E M	anage Goals	¢° M
General	Definitions	Retention			
Delete da	ily metrics old	der than X da	ys		
How many	r previous days	should be ke	pt in add	tion to the curren	t 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:

📚 -	Accounts 👻	Contacts 👻 Op	portunities 🔻	L	eads 🔻 Cale	enda	r 🔻 Reports	•	Quotes 👻 🔳	arget Mo	odule
Target	Module (3)									Create	»
Filter 🔻 🕻	Create 🙁 Search I	by name							2	■	0
Benchma	irk Name	🗙 👻 🛛 is ar	iy of		•		Accounts			_	+
Results fo	or Metric "Accounts I	By User"							Reset Cancel	Save	•
-	Name 🌲	Benchmark Na 🌲	Related To	\$	Start Date	\$	End Date	G	rouped By So♦	¢	ł
□ ☆	Accounts By U	Accounts By U	Sarah Smith		06/18/2020		06/18/2020			۲	•
☆	Accounts By U	Accounts By U	Chris Olliver		06/18/2020		06/18/2020			۲	•
□ ☆	Accounts By U	Accounts By U	Will Westin		06/18/2020		06/18/2020			۲	•

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.

📚 🔹 Accounts 👻 Contacts		alendar 👻 Reports 🗸	▼ Quotes ▼	wBenchmark 👻	I Search	۹	20+ 🧟 + 🕂
WB Name June_B3_C3_wBenchma	rk Acc by User 🗘 🔜 Ma	nage Goals 😽 🏘 Mar	nage Studio Fiel	ds 🕞 Run Sch	eduler Now 🗕 🕇 Ger	nerate Scheduler	Cancel Save
General Definitions Retention							
Automatic Computation Status			Target Module				
Active		-	Target Module	2			-
Enable or Disable Benchmark Computation	n		Module where the module based on	computations will b the wBenchmark ten	e saved. To create a module, nplate.	, go to Sugar Module	Builder and build a new
Group By Users			Module Field				
Having this option checked should enable user filter, per instance metrics and per te	the calculation of Global metrics and Team me am metrics)	trics (basically no	Having this option become an additic	checked should allo onal Group By clause	w the user to pick a custom .	module and a custom	field which would
Create metrics for Users	Teams				System/Global		
					✓		
Calculate a value for each linked user	Calculate	a total value for each linked	team		Calculate a global / system	wide value for each d	efinition
Calculate For							
Day	Week	Month		Quarter		Year	
		Image: A start and a start		~		~	
Enable or Disable calculation and history for each day	Enable or Disable calculation and archive for each week	Enable or Disable calculat each month	ion and archive for	Enable or Disable each quarter	calculation and archive for	Enable or Disable o for each year	alculation and archive

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

e •	Accounts 🔻 Co	ontacts 👻 Opportui	nities 👻 Leads 👻	Calendar	 wBenchr 	mark 👻 İ Sear	rch	Q	20 +	न्	-
WB	Name June_B: ☆	E Manage Go	als 🔷 Manage S	tudio Fields	🕞 Run S	cheduler Now	Generate Sched	luler	Cance	al Sa	ave
Us USER	S (3)									+	٠
1	Full Name	User Name 🜲	Title	Departme	ent 🗢	Email Address	Office Phone	\$	Status		
N N	Will Westin	will	Sales Manager East			will@example.com			Active	Ş	3
5	Sarah Smith	sarah	Sales Manager Wes	t		sarah@example.c			Active	Ş	\$ 5
	Chris Olliver	chris	Senior Account Rep	1		chris@example.c			Active	\$	\$ 5
Te TEAM	IS (1)									+	•
	Team Name			\$	Date Modifie	ed					
☆	Romania				06/18/2020	10:08am				۲	•

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

wB lune F	습 🔳	Manage Goals	o; Manage	e Studio Field	s 🕞 Run	Scheduler N	low +	Generate S	Scheduler	Cancel	Sa
ACCOUNTS [# 1]:				LBL V	INTEGER f	rom 🕅 Ta	rget Modu	le = COUNT	filtered by	All Accour	nts
		-									
Definition # 1 Displayed as No of Acc	ounts and calculated as COUN	T of Accoun	nts filtered by	All Accounts	saved on fi	eld LBL_W_II	NTEGER (W	_integer_c)	from TM	Target Mo	odule
lisplay Name											
No of Accounts											
elect Operation (what operation we should	do with source data)										
Count											
elect Destination Field (where to store the	result)										
LBL_W_INTEGER	esony										
lser field used to group records (optional)			Dat	e field used to l	imit record se	election to eval	uated time	period (optio	inal)		
			- Ia	nore Date Fie	ld						
Assigned to			- Ig								
Assigned to	portunities • Leads • Calenda	ar • Reports •	Quotes •	Documents +	Emails 👻 1	wBenchmark •	I	Search	Q	200	፼ -
Accounts Contacts Op	oortunities ♥ Leads ♥ Calenda User	ar ▼ Reports ▼ ☆ ■Ma	Quotes -	Documents	Emails • 1	wBenchmark 👻	i duler Now	Search	Q ate Schedu	203 ler Cance	👷 🕶
Accounts Contacts Op Name June_B3_C3_wBenchmark Acc by Accounts (# 2):	portunities • Leads • Calenda User	ar • Reports •	Quotes • I	Documents +	Emails - 1 tudio Fields Users from	wBenchmark - © Run Sche 1 M Target M	i duler Now	Search + Gener	Q ate Schedu to) filtered	200 Ier Cance by All Accor	👷 🗸
Accounts Contacts Op Name [une_B3_C3_wBenchmark Acc by Accounts (# 2): Definition #2 Displayed as Copy Users an	ortunities • Leads • Calenda User	ar ♥ Reports ♥ ☆ Main I to (assigned user, na	Quotes - I anage Goals	Documents Comments Comme	Emails • 1 cudio Fields Users from tered by All A	wBenchmark • © Run Sche Target N ccounts saved	i duler Now Iodule = COI on field Us	Search Generation of the second seco	Q ate Schedu to) filtered	er Cance by All Accou	R - I Se unts ule
Assigned to Accounts Contacts Op Mame June_B3_C3_wBenchmark Acc by Accounts (# 2): Definition # 2 Displayed as Copy Users an splay Name	oortunities • Leads • Calenda User d calculated as COPY of Assigned	ar • Reports •	Quotes • I anage Goals	Documents • a: Manage St Accounts fil	Emails The second seco	Run Sche Run Sche Torget M Saved	i duler Now todule = COI	Search Generation Y (Assigned 1 ers (users_c)	Q ate Schedu to) filtered	er Cance by All Accou	a Se unts ule
Assigned to Accounts Contacts Op MB Name [une_B3_C3_wBenchmark Acc by Accounts (# 2): Definition #2 Displayed as CopyUsers ar splay Name Copy Users	oortunities • Leads • Calend User d calculated as COPY of Assigned	ar • Reports •	Quotes • I anage Goals	Documents • C: Manage S Accounts fil	Emails • 1 udio Fields Users from	WBenchmark • © Run Sche Target N Target Saved	i duler Now todule = COI on field Us	Search Gener Y (Assigned 1 PY (assigned 1 ors (users_c)	Q ate Schedu to) filtered i from 1	er Cance by All Accou	R - el Se unts ule
Assigned to Accounts Contacts Op MB Name [une_B3_C3_wBenchmark Acc by Accounts (# 2): Definition # 2 Displayed as Copy Users ar splay Name :opy Users lect Operation (what operation we should do wil	bortunities Leads Calend: User d calculated as COPY of Assigned h source data)	ar • Reports •	Quotes - Innage Goals	C Manage S	Emails • 1 uudio Fields Users from tered by All A	WBenchmark • © Run Schel To Target M ccounts saved	i duler Now todule = COI	Search Gener Y (Assigned 1 ers (users_c)	Q ate Schedu to) filtered	200 J ler Cance by All Accou Target Modu	R ▼ Se unts ule
Assigned to Accounts Contacts Op MB Name [Inne_B3_C3_wBenchmark Acc by Accounts [# 2]: Definition # 2 Displayed as Copy Users ar splay Name Copy Users lect Operation (what operation we should do wit Copy	ortunities - Leads - Calends User d calculated as COPY of Assigned h source data)	ar • Reports •	Quotes Quotes anage Goals	Documents •	Emails • 1 uudio Fields Users from tered by All A	Run Sche Target N Cocounts saved	i duler Now todule = COI on field Us	Search Gener YY (Assigned : ers (users_c)	Q ate Schedu to) filtered	er Cance by All Accou	R - Se unts ule
Accounts Contacts Op Mame [Inne_B3_C3_wBenchmark Acc by ACCOUNTS [# 2]: Definition # 2 Displayed as Copy Users ar splay Name Copy Users Net Operation (what operation we should do with Copy	ortunities - Leads - Calenda User d calculated as COPY of Assigned h source data)	ar • Reports •	Quotes Quotes anage Goals	Documents •	Emails • N tudio Fields Users from tered by All A	WBenchmark Torget N Torget N Saved	i duler Now todule = CO on field Us	Search Gener Y(Assigned 1 Y(users_c)	Q ate Schedu to) filtered i from @	er Cance by All Accou Target Modu	R - el Se unts ule
Accounts Contacts Contacts Accounts Contacts Contacts Accounts Contacts Contacts Accounts (Inc., B3_C3_wBenchmark Acc by Accounts (# 2): Definition # 2 Displayed as Copy Users ar splay Name Copy Users Nect Operation (what operation we should do wit Copy Nect Source Field (from where we get data)	ortunities - Leads - Calenda User d calculated as COPY of Assigned h source data)	ar • Reports •	Quotes • 1 anage Goals arme) from (Cocuments Cocum	Emails • 1 Ludio Fields Users from tered by All A	wBenchmark • © Run Scher © Target N ccounts saved re the result)	i duler Now todule - COI on field Us	Search Gener Y (Assigned rers (users_c)	Q ate Schedu to) filtered	er Cance by All Accou Target Mode	Se v unts ule
Accounts Contacts Contacts Accounts Contacts Contacts Accounts Contacts Contacts Accounts (June, B3_C3_wBenchmark Acc by Accounts (# 2): Definition # 2 Displayed as Copy Users ar splay Name Copy Users Nect Operation (what operation we should do wit Copy Nect Source Field (from where we get data) Usesigned to	ortunities • Leads • Calenda User d calculated as COPY of Assigned h source data)	ar • Reports •	Quotes • 1 Quotes • 1 anage Goals arme) from (Sele • Noc	Cocuments Cocum	Emails • 1 uudio Fields Users from tered by All A	wBenchmark • © Run Sche © Target N ccounts saved re the result)	i duler Now todule - COI on field Us	Search Gener Y (Assigned I rers (users_c)	ate Schedu to) filtered	er Cance by All Accou Target Modu	C Second
Accounts Contacts Opp Name [June_B3_C3_wBenchmark Acc by ACCOUNTS (# 2): Definition # 2 Displayed as Copy Users ar splay Name Copy Users Net Operation (what operation we should do with Copy Net Source Field (from where we get data) Usergined to set field used to group records (optional)	ortunities - Leads - Calenda User d calculated as COPY of Assigned h source data)	ar • Reports •	Quotes • 1 Quotes • 1 anage Goals arme) from (Sele No Data	Cocuments Cocum	Emails • 1 uudio Fields Users from tered by All A	wBenchmark • © Run Sche © Target N ccounts saved re the result) on to evaluated	i duler Now on field Ur	Search	Q ate Schedu to) filtered i from 11	er Cance by All Accou Target Modu	R - El Se unts ule
Accounts Contacts Op Name [June_B3_C3_wBenchmark Acc by Accounts (# 2): Definition # 2 Displayed as Copy Users ar splay Name locy Users lect Operation (what operation we should do with icopy lect Source Field (from where we get data) ussigned to ar field used to group records (optional) ussigned to	ortunites • Leads • Calenda User d calculated as COPY of Assigned h source data)	ar • Reports •	Quotes • 1 anage Goals ame) from Q Sele • Not Date	Cocuments Cocum	Emails • 1 uudio Fields Users from tered by All A	WBenchmark To Run Scher Target N ccounts saved re the result) on to evaluated to	i duler Now Iodule - CO on field Us	Search	ate Schedu to) filtered i from 🔞	er Cance by All Accou Targot Modu	R - Se unts ule
📚 🔹 Accounts 👻 Contacts 👻 Opportunities 👻 Leads 👻 Calendar 💌 Repo	rts 🕶 Quotes 👻 wBenchmark 👻 i Search 🔍 🥹 🧟 🕈 🕇										
---	--										
WB 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 M Target Module = MIN (Date Created) filtered by My Accounts										
Definition # 3 Displayed as First Acc Created and calculated as MIN of Date Created (dat saved on field LBL_W_DATETIME (w_datetime_c) from Marget Module	e_entered) from A: Accounts filtered by My Accounts										
Display Name											
First Acc Created											
Select Operation (what operation we should do with source data)											
Min	•										
Colore Courses Field (from scheme un out data)	Callert Destination Field (where to store the event)										
Data Granted	Select Destination Field (where to store the result)										
Date created											
User field used to group records (optional)	Date field used to limit record selection to evaluated time period (optional)										
Assigned to -	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 👻 Op	oportunities 🝷	Leads 👻 🛛 Ta	rget Mo	dule 👻	:	
Target	Module (20)						Crea	te
Filter 🔻 🕻	Create 🙁 Search I	by name				C	■	0
Benchma	irk Name 🗙	✓ is any of	-	June_B3_C3			-	+
Results fo	or Metric "June_B3_C	3_wBenchmark Acc	by U		Reset	Cancel	Save	•
-	Name 💠	Benchmark Na 🜩	Related To	Start Date	φE	End Date	4	>
□ ☆	June_B3_C3_w	June_B3_C3_w		01/01/2020	1	2/31/2020	۲	•
□ ☆	June_B3_C3_w	June_B3_C3_w		04/01/2020	(06/30/2020	۲	•
	June_B3_C3_w	June_B3_C3_w		06/01/2020	(06/30/2020	۲	•
□ ☆	June_B3_C3_w	June_B3_C3_w		06/16/2020	(06/22/2020	۲	•
_ ☆	lune B3 C3 w	lune B3 C3 w		06/18/2020	(06/18/2020	۲	•

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 Mod											Iodule		
Target Module (3) Create										e »			
Filter 👻 🛛	Filter • Create 😒 Search by name										■	0	
Benchma	rk Name	× •	is an	y of		•		June_B3_C3Ø)] –	+
Calculate	d By	× •	is an	any of 🗸 User 🕄] –	+	
Frequenc	у	× •	is an	y of		•		Daily 🕄] -	+
Results fo	or Metric "June_B3_C	3_wBenchmar	k Acc	by User"						Reset	Cancel	Save	•
-	Name 🔶	Benchmark N	a 🌩	Related To	\$	Start Date	\$	End Date	\$	Grouped	By So…♦		¢
□ ☆	June_B3_C3_w	June_B3_C3_v	w	Chris Olliver		06/18/2020		06/18/2020				۲	•
□ ☆	June_B3_C3_w	June_B3_C3_	w	Sarah Smith		06/18/2020		06/18/2020				۲	•
□ ☆	June_B3_C3_w	June_B3_C3_v	w	Will Westin		06/18/2020		06/18/2020				۲	•

User Weekly Computations:

📚 🗸	Accounts 👻	Contacts 👻 Op	oportunities 👻	L	eads 🔻 Cal	enda	ar 👻 Reports	•	Quotes	•	Targ	get M	odule
Target Module (3) Create											»		
Filter 🔻 🕻	reate 😢 Search	by name								i	C	⊞	0
Benchma	rk Name	🗙 👻 🛛 is ar	ny of		•		June_B3_C3©					-	+
Calculate	d By	🗙 👻 🛛 is ar	ny of		•		User 😂					-	+
Frequenc	у	🗙 👻 is ar	ny of		•		Weekly 😂					-	+
Results fo	r Metric "June_B3_C	3_wBenchmark Acc	by User"						Reset	Cancel	S	ave	•
-	Name 🔶	Benchmark Na 🖨	Related To	¢	Start Date	¢	End Date	¢	Grouped E	By So\$		¢	5
□ ☆	June_B3_C3_w	June_B3_C3_w	Chris Olliver		06/16/2020		06/22/2020					۲	•
그 ☆	June_B3_C3_w	June_B3_C3_w	Sarah Smith		06/16/2020		06/22/2020					۲	•
	June_B3_C3_w	June_B3_C3_w	Will Westin		06/16/2020		06/22/2020					۲	•

User Monthly Computations:

📚 🗸	Accounts 👻	Contacts 🔻 O	oportunities 🔻	L	eads 🔻 Cal	enda	ir 🔻 Report	s 🔻	Quote	s 🔻 '	Target N	1odule
Target Module (3)										e »		
Filter 🕶 🤇	Create 🙁 Search	by name								£	; 🔳	٢
Benchma	irk Name	🗙 👻 🛛 is a	ny of		-		June_B3_C3©)			-	+
Calculate	d By	× 🗸 is a	ny of		•		User 🛛					+
Frequenc	у	🗙 👻 🛛 is a	ny of		•		Monthly 🕄] -	+
Results fo	or Metric "June_B3_C	23_wBenchmark Acc	by User"						Reset	Cancel	Save	•
-	Name 🔶	Benchmark Na 🜩	Related To	\$	Start Date	\$	End Date	\$	Grouped	By So…♦		0
□ ☆	June_B3_C3_w	June_B3_C3_w	Chris Olliver		06/01/2020		06/30/2020				۲	•
□ ☆	June_B3_C3_w	June_B3_C3_w	Sarah Smith		06/01/2020		06/30/2020				۲	•
	June_B3_C3_w	June_B3_C3_w	Will Westin		06/01/2020		06/30/2020				۲	•

The benchmark computations are calculated for linked the ${\bf Users}\,$, ${\bf Users}\,$ form the linked Team, and for the ${\bf Month}\,$ when the computation was performed.

User Quarterly Computations

📚 🗸 Accounts 🗸	Contacts 🔻 O	oportunities 🔻	Leads 🔻 Cale	endar 🔻 Repor	rts 🔻 Quot	es 🔻 T	arget Mo	dule
Target Module (3)							Create	~
Filter - Create Search	by name					8		Θ
Benchmark Name	🗙 🗕 🛛 is a	ny of	-	June_B3_C3@	3] - ·	+
Calculated By	🗙 🗕 🛛 is a	ny of	-	User 3] - ·	+
Frequency	🗙 👻 is a	ny of	•	Quarterly 😵				÷
Results for Metric "June_B3_	C3_wBenchmark Acc	by User"			Reset	Cancel	Save	•
Name \$	Benchmark Na 🌩	Related To 🔶	Start Date	End Date	Groupe	d By So…♦	¢	
□ ☆ June_B3_C3_w	June_B3_C3_w	Chris Olliver	04/01/2020	06/30/2020			۲	•
□ ☆ June_B3_C3_w	June_B3_C3_w	Sarah Smith	04/01/2020	06/30/2020			۲	•
□ ☆ June_B3_C3_w	June_B3_C3_w	Will Westin	04/01/2020	06/30/2020			۲	•

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

📚 -	Accounts 👻	Contacts 👻 O	oportunities 👻	Leads 🔻	Calenda	r 🔻 Repor	ts 🔻	Quote	s 🗸 -	Farget N	Nodule
Target	Module (3)									Creat	e ×
Filter 👻 🕻	Create 🙁 Search	by name							۲.	; =	Θ
Benchmark Name 🗶 🗸					• (June_B3_C3	3			-	+
Calculated By					•	User 😮				-	+
Frequenc	у	🗙 👻 is a	ny of		• (Yearly 🕄] -	+
Results fo	or Metric "June_B3_C	3_wBenchmark Acc	by User"					Reset	Cancel	Save	•
-	Name 🔶	Benchmark Na 🖨	Related To	Start Date	\$	End Date	\$	Grouped	By So…♦		¢
	June_B3_C3_w	June_B3_C3_w	Chris Olliver	01/01/202	0	12/31/2020				۲	•
	June_B3_C3_w	June_B3_C3_w	Sarah Smith	01/01/202	0	12/31/2020				۲	•
	June_B3_C3_w	June_B3_C3_w	Will Westin	01/01/202	0	12/31/2020				۲	•

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

📚 🕶 Accounts 👻 Contacts	✓ Opportunities ✓ L	.eads 🔻 Calendar	r ▼ Reports ▼	Quotes 👻 -	Farget M	lodule		
Target Module (1) Create								
Filter - Create 🛞 Search by name				6	; =	Ο		
Benchmark Name 🗙 🗸	is any of	-	June_B3_C3 🕄		-	+		
Calculated By	is any of Global 🕄							
Frequency 🗙 🗸	is any of	•	Daily 😮		-	+		
Results for Metric "June_B3_C3_wBench	mark Acc by User"			Reset Cancel	Save	•		
Name 🗢 Benchm	rk N Related To 🗘	Start Date 🔶	End Date 🔶	Grouped By So♦	<	¢		
□ ☆ June_B3_C3_w June_B3	C3_w	06/18/2020	06/18/2020		۲	•		

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

📚 🕶	Accounts 👻	Contacts ·	• Op	oportunities	• L	eads 🔻 Cal	lenda	r 🔻 Reports	▼ Qu	uotes 🔻	Targe	et Mod
Target	Module (5)										Cre	ate
Filter 👻 🕻	Create 🙁 Search	by name								2	; 🔳	0
Benchma	irk Name	× -	is any	is any of] -	+
Calculate	d By	× -	is any	any of 🔹 🚺] -	+
Frequenc	У	× •	is any	y of		•		aily 🕄 Weekly	() Mon	thly 🕄	- [+
	M		1.4		_			Quarterly 😋 Ye	ariy	C 1		
Results fo	or Metric "June_B3_C	.3_wBenchm	ark Acc	by User"					Reset	Cancel	Save	
-	Name 🔶	Benchmar	k N 🗸	Related To	\$	Start Date	\$	End Date	♦ Grou	iped By So	\$	¢
□ ☆	June_B3_C3_w	June_B3_C	3_w			06/18/2020		06/18/2020			۲	•
□ ☆	June_B3_C3_w	June_B3_C	3_w			06/16/2020		06/22/2020			۲	•
□ ☆	June_B3_C3_w	June_B3_C	3_w			06/01/2020		06/30/2020			۲	•
□ ☆	June_B3_C3_w	June_B3_C	3_w			04/01/2020		06/30/2020			۲	•

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 ✓ C	alendar 👻 Reports	▼ Quotes ▼	wBenchmark 👻	Search	٩	20 +		
WB Name June_C9_B9_Invoice_Cal	culations_Grou	inage Goals 🔷 Mar	nage Studio Fiel	ds 💿 Run Sche	eduler Now 🗕 + Gen	erate Scheduler	Cancel Save		
General Definitions Retention									
Automatic Computation Status			Target Module						
Active		•	Target Module				•		
Enable or Disable Benchmark Computation	n		Module where the module based on t	computations will be the wBenchmark temp	saved. To create a module, plate.	go to Sugar Module B	uilder and build a new		
Group By Users			Module Field						
Having this option checked should enable user filter, per instance metrics and per te	the calculation of Global metrics and Team me am metrics)	trics (basically no	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			Group By Field						
Opportunities		•	Sales Stage				•		
Group by Source Module			Group by Source F	ield					
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 calculat each month	tion and archive for	Enable or Disable c each quarter	alculation and archive for	Enable or Disable ca for each year	lculation and archive		

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

📚 🕶 Accounts 👻 Contacts 👻 Opportui	nities 👻 Leads 👻	Calendar 👻	Reports 👻 Qu	otes 🔻 Do	cuments 👻 Emai	ls 🔻
WB June 🏠 Manage Goals	os Manage Stud	dio Fields 💿	Run Scheduler N	ow 📄 Cor	figure Scheduler	Can
OPPORTUNITIES [# 1]:	Invoice Min from	TM Target Mo	odule = MIN (Likely) filtered by	All Opportunities	-
Definition #1 Displayed as Minimum Invoice and	d calculated as MIN	of Likely (am	ount) from op	Opportunities		
filtered by All Opportunities saved on field Invo	oice Min (invoice_mi	n_c) from TM	Target Module			
Display Name						
Minimum Invoice						
Select Operation (what operation we should do with sou	rce data)					
Min						•
Select Source Field (from where we get data)		Select Destinat	ion Field (where to st	ore the result)		
Likely	•	Invoice Min				•
Date field used to limit record selection to evaluated tim	e period (optional)					
Ignore Date Field						-

📚 🗸 Accounts 🗸 Contacts 🗸 Opportunities 👻 Leads	
Name Manage Manage<	udio Fields Run Scheduler Now Configure Scheduler Can
OP OPPORTUNITIES [# 2]: Invoice Max fro	Target Module = MAX (Likely) filtered by All Opportunities
Definition # 2 Displayed as Maximum Imvoice and calculated as M filtered by All Opportunities saved on field Invoice Max (invoice_	IAX of Likely (amount) from Op Opportunities max_c) from Target Module
Display Name	
Maximum Imvoice	
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)
LINCIY	
Date field used to limit record selection to evaluated time period (optional)	
Ignore Date Field	▲
Filter	

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 Module Field for the Sales Stage

-	Accounts 👻	Contacts •	• Op	portunities 🖣	- L	eads 🔻 Cal	enda	ir 🔻 Report	s •	Quot	es 🔻	Target	Mod
Target	Module (10)											Crea	ite
Filter 🔻 🔽	Create 😣 Search I	by name									3	■	0
Benchma	ark Name	× •	is any	/ of		•		une_C9_B9Ø				-	+
Frequenc	-y	× •	is any	/ of		•		Monthly 🕄	_			-	+
Results fo	or Metric "June_C9_B	9_Invoice_Ca	alculatio	ns_Grouped_t	by_					Reset	Cancel	Save	•
-	Name 🔶	Benchmark	Na 🖨	Related To	\$	Start Date	¢	End Date	\$	Groupe	d By So…∉	¢	>
□ ☆	June_C9_B9_In	June_C9_B	9_ln			06/01/2020		06/30/2020		Value F	ropositi	۲	•
☆	June_C9_B9_In	June_C9_B	9_ In .			06/01/2020		06/30/2020		Qualifi	ation	۲	•
□ ☆	June_C9_B9_In	June_C9_B	9_ In			06/01/2020		06/30/2020		Prospe	cting	۲	•
그 ☆	June_C9_B9_In	June_C9_B	9_ln			06/01/2020		06/30/2020		Propos	al/Price	. 👁	•
□ ☆	June_C9_B9_In	June_C9_B	9_ln			06/01/2020		06/30/2020		Percep	tion Ana	۲	•
□ ☆	June_C9_B9_In	June_C9_B	9_ln			06/01/2020		06/30/2020		Negoti	ation/Re	۲	•

The benchmark computations are calculated for each value of the selected ${\bf Module}$ ${\bf Field}\,$, for the ${\bf Month}\,$ when the computation was performed.

Yearly Computations Grouped by Module Field for the Sales Stage

Target	Module (10)										Crea	te
Filter 🔻 🕻	Create 🙁 Search l	by name								0	■	0
Benchma	irk Name	× •	is an	y of		•		une_C9_B9®			-	+
Frequenc	y	× -	is an	y of		-		Yearly 🕲			-	+
Results fo	or Metric "June_C9_B	9_Invoice_Ca	lculatio	ons_Grouped_l	oy_				Res	et Cancel	Save	•
-	Name 🔶	Benchmark	Na 🖨	Related To	\$	Start Date	¢	End Date	♦ Gr	rouped By So¢	¢	\$
☆	June_C9_B9_In	June_C9_B	9_In			01/01/2020		12/31/2020	Va	alue Propositi	۲	•
☆	June_C9_B9_In	June_C9_B	9_In			01/01/2020		12/31/2020	Q	ualification	۲	•
· ☆	June_C9_B9_In	June_C9_B	9_In			01/01/2020		12/31/2020	Pr	ospecting	۲	•
☆	June_C9_B9_In	June_C9_B	9_In			01/01/2020		12/31/2020	Pr	oposal/Price	۲	•
_ ☆	June_C9_B9_In	June_C9_B	9_ln			01/01/2020		12/31/2020	Pe	erception Ana	۲	•
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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.

June_B11_C11_Inv	oice_Calculations_Grou	ped_by_User			Cancel Sav
General Definitions Retenti	on				
Automatic Computation Status			Target Modu	le	
Active		•	Target Mod	lule	
nable or Disable Benchmark Com	putation		Module where Builder and b	e the computations will be saved. To c uild a new module based on the wBen	reate a module, go to Sugar Module ichmark template.
iroup By Jsers			Module Field		
2			~		
aving this option checked should netrics (basically no user filter, per	enable the calculation of Globa r instance metrics and per team	al metrics and Team n metrics)	Having this op field which wo	tion checked should allow the user to uld become an additional Group By cl	pick a custom module and a custom lause.
Group By Module			Group By Fie	ld	
Opportunities		•	Sales Stage		•
roup by Source Module			Group by Sou	rce Field	
Treate metrics for	1	leams		System/Global	
reate metrics for Isers					
reate metrics for Isers	(
ireate metrics for Isers 2 alculate a value for each linked u	ser (Calculate a total value for ea	ch linked team	Calculate a global /	system wide value for each definition
reate metrics for isers al alculate a value for each linked u: ialculate For iav	ser (Calculate a total value for ear Month	ch linked team	Calculate a global / Ouarter	system wide value for each definition Year
reate metrics for Jsers a calculate a value for each linked u: calculate For Jay	(ser c	 Calculate a total value for ear Month	ch linked team	Calculate a global / Quarter	system wide value for each definition Year

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

📚 🗸	Accounts 🝷 C	ontacts 👻 Opp	ortuni	ties 🔻	Leads 🔻	0	Calendar	•	wBen	chmark 🔻
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Us USE	RS (3)									+ •
	Full Name	User Name	¢	Title		\$	Departm	ent		
	Will Westin	will		Sales N	lanager East					۶š
	Sarah Smith	sarah		Sales N	lanager West	t				\$ 5
	Chris Olliver	chris		Senior	Account Rep					్లో
Te TEA	MS (1)									+ -
	Team Name			⇔ Da	te Modified					
☆	West			04	07/2020 04:5	50p	m			• •

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

Name Image Image <th>😂 🕶 Accounts 👻 Contacts 👻 Opportunities 👻</th> <th>Leads 🕶 Calendar 🕶 Reports 🕶 Quotes 💌 Documents 🕶 Emails 💌</th>	😂 🕶 Accounts 👻 Contacts 👻 Opportunities 👻	Leads 🕶 Calendar 🕶 Reports 🕶 Quotes 💌 Documents 🕶 Emails 💌
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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 🖣	Ор	portunities 🔻	L	eads 🔻 Cale	enda	r 🔻 Report	s 🔻	Quotes 👻	Target	t Mod	ul
Target	Module (9)										Crea	ate	
Filter 👻 🖸	create 😢 Search l	by name								3	■	٢	
Benchma	rk Name	× -	is any	/ of		•		une_B11_CØ			-	+	
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Yearly computations **Grouped by User = Sally Bronsen** and module field **Sales Stage**:

- 🥩	Accounts 👻	Contacts	• Ор	portunities 🔻	L	eads 🔻 Cale	enda	r 🔻 Reports	•	Quotes 🔻 🔳	arget	Modul
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Filter 🔻 🕻	Create 🙁 Search	by name								0	▦	0
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Frequenc	у	× -	is any	/ of		-	C	early 😮			-	+
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二 ☆	June_B11_C11	June_B11_0	C11	Sally Bronsen		01/01/2020		12/31/2020		Qualification	۲	•
□ ☆	June_B11_C11	June_B11_0	C11	Sally Bronsen		01/01/2020		12/31/2020		Prospecting	۲	•
□ ☆	June_B11_C11	June_B11_0	C11	Sally Bronsen		01/01/2020		12/31/2020		Proposal/Price	۲	•
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Monthly computations **Grouped by User = Max Jensen** and module field **Sales Stage**:

Create Filter * Create & Search by name Benchmark Name X is any of (une_B11_C) -	-	Accounts 👻	Contacts 👻	Ор	portunities 👻	L	eads 🔻 Cal	enda	ar 🔻 Repor	ts 🔻	Quotes	- T	arget l	Mod
Filter * Create S Search by name Image: Search by name Ima	Target N	Module (9)											Creat	e
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Advanced Related To X < Selected User(s) Max Jensen © Reset Cancel Save Results for Metric "June_B11_C11_Invoice_Calculations_Grouped_I Reset Cancel Save <	Frequency		× -	is any	r of		•		Monthly 🕄				-	+
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□ ☆ June_B11_C11 June_B11_C11 Max Jensen 06/01/2020 06/30/2020 Perception Ana	□ ☆ J	June_B11_C11	June_B11_C		Max Jensen		06/01/2020		06/30/2020		Perception A	Ana	۲	•

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

📚 -	Accounts 🔻	Contacts	• Op	oportunities 🔻	L	eads 👻 Cale	enda	r 🔻 Report	s 🔻	Quotes 👻 🧧	arget	Modul
Target	Module (9)									l	Crea	te
Filter 🔻 🕻	Create 🙁 Search	by name								3	■	0
Benchma	rk Name	× •	is an	y of		•	0	une_B11_C©			-	+
Frequenc	у	× -	is any	y of		-	ſ	early 🛛			-	+
Advanced	d Related To	× -	Selec	ted User(s)		-		/lax Jensen 🛛			-	+
Results fo	or Metric "June_B11_	C11_Invoice_	Calcula	itions_Grouped_	ł					Reset Cancel	Save	•
-	Name 🔶	Benchmark	Na�	Related To	¢	Start Date	\$	End Date	¢	Grouped By So¢	¢	•
	June_B11_C11	June_B11_C		Max Jensen		01/01/2020		12/31/2020		Value Propositi	۲	•
그 ☆	June_B11_C11	June_B11_C		Max Jensen		01/01/2020		12/31/2020		Qualification	۲	•
	June_B11_C11	June_B11_C		Max Jensen		01/01/2020		12/31/2020		Prospecting	۲	•
	June_B11_C11	June_B11_C		Max Jensen		01/01/2020		12/31/2020		Proposal/Price	۲	•
	June_B11_C11	June_B11_C	.11	Max Jensen		01/01/2020		12/31/2020		Perception Ana	۲	•

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

-	Accounts 👻	Contacts	• Ор	portunities 👻	L	eads 🔻 Cale	nda	r 🔻 Reports	▼ Qu	uotes 🔻	Tar	rget Mo	dule
Target	Module (9)										C	reate	»
Filter 🔻 🕻	Create 😣 Search	by name									2		1
Benchma	ark Name	× •	is any	/ of		•		une_B11_C©				- +	
Frequenc	-y	× •	is any	/ of		•		Monthly 😂				- +	
Advanced	d Related To	× •	Selec	ted User(s)		•		Chris Olliver 🕲				- +	
Results fo	or Metric "June_B11_	C11_Invoice	_Calcula	tions_Grouped_	ł				Reset	Cance	Sav	ve 👻	
-	Name 🌲	Benchmark	Na 🖨	Related To	\$	Start Date	¢	End Date 🗧	¢ Grou	ped By So	o¢	٥	
□ ☆	June_B11_C11	June_B11_	C11	Chris Olliver		06/01/2020		06/30/2020	Valu	e Propos	iti	• •	
□ ☆	June_B11_C11	June_B11_	C11	Chris Olliver		06/01/2020		06/30/2020	Qual	ification		• •	
□ ☆	June_B11_C11	June_B11_	C11	Chris Olliver		06/01/2020		06/30/2020	Pros	pecting		• •	
□ ☆	June_B11_C11	June_B11_	C11	Chris Olliver		06/01/2020		06/30/2020	Prop	osal/Pric	:e	• •	
□ ☆	June_B11_C11	June_B11_	C11	Chris Olliver		06/01/2020		06/30/2020	Perc	eption A	na	• •	

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

-	Accounts 👻	Contacts 👻 O	pportunities 🔻	Leads 🔻	Calendar		• Quotes •	Target N	lodu
Target	Module (9)							Create	e
Filter 🔻 🕻	Create 🙁 Search	by name					2		Э
Benchma	ark Name	🗙 👻 is ar	ny of		▼ Jun	e_B11_C			÷
Frequenc	:y	🗙 👻 is ar	ny of		• Yea	arly 🕲			÷
Advanced	d Related To	X - Sele	cted User(s)		- Chr	is Olliver 🛛			÷
Results fo	or Metric "June_B11_	_C11_Invoice_Calcul	ations_Grouped_I				Reset Cancel	Save	•
-	Name 🔶	Benchmark Na 🗢	Related To	Start Date	¢ E	nd Date 🔶	Grouped By So♦	٥	
습 다	June_B11_C11	June_B11_C11	Chris Olliver	01/01/202	20 1	2/31/2020	Value Propositi	۲	•
· ☆	June_B11_C11	June_B11_C11	Chris Olliver	01/01/202	20 1	2/31/2020	Qualification	۲	•
_ ☆	June_B11_C11	June_B11_C11	Chris Olliver	01/01/202	20 1	2/31/2020	Prospecting	۲	•
☆	June_B11_C11	June_B11_C11	Chris Olliver	01/01/202	20 1	2/31/2020	Proposal/Price	۲	•
· · ·	June_B11_C11	June_B11_C11	Chris Olliver	01/01/202	20 1	2/31/2020	Perception Ana	۲	•

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

-	Accounts	Contacts 🝷	Ор	portunities 🔻	L	eads 🔻 Cal	enda	r 🔻 Report	ts 🔻	Quotes	- [arget	Mod
Target	Module (9)											Creat	e
Filter 🔻 🕻	Create 🙁 Search I	by name									0	■	0
Benchma	rk Name	× •	is any	/ of		•		une_B11_C©				-	+
Frequenc	у	× •	is any	/ of		•		Monthly 😣				-	+
Advanced	Related To	× -	Selec	ted User(s)		•		arah Smith 🗿				-	+
Results fo	or Metric "June_B11_	C11_Invoice_(Calcula	tions_Grouped_	ł					Reset Can	cel	Save	•
-	Name 🜲	Benchmark N	\a♦	Related To	\$	Start Date	¢	End Date	\$	Grouped By	So¢	٥	
□ ☆	June_B11_C11	June_B11_C	11	Sarah Smith		06/01/2020		06/30/2020		Value Prop	ositi	۲	•
	June_B11_C11	June_B11_C	11	Sarah Smith		06/01/2020		06/30/2020		Qualificatio	n	۲	•
□ ☆	June_B11_C11	June_B11_C	11	Sarah Smith		06/01/2020		06/30/2020		Prospecting	g	۲	•
□ ☆	June_B11_C11	June_B11_C	11	Sarah Smith		06/01/2020		06/30/2020		Proposal/P	rice	۲	•
☆	June_B11_C11	June_B11_C	11	Sarah Smith		06/01/2020		06/30/2020		Perception	Ana	۲	•

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

-	Accounts 👻	Contacts 👻 🤇	Opportunities 🔻	L	eads 👻 Caler	nda	r 🔻 Reports	•	Quotes 👻	Targe	t Mod	ule
Target	Module (9)									Crea	ate	>>
Filter 🔻 🕻	Create 😵 Search	by name							2	■	0	Î
Benchma	ark Name	🗙 🛨 is a	ny of		•	C	une_B11_CØ			-	+	I
Frequenc	-y	× 🗸 is a	ny of		•	ſ	early 🕲			-	+	
Advanced	d Related To	× - Sel	ected User(s)		•	G	arah Smith 😵			-	+	I
Results fo	or Metric "June_B11_	_C11_Invoice_Calcu	llations_Grouped_	ł					Reset Cancel	Save	-	l
-	Name 🔶	Benchmark Na 4	Related To	¢	Start Date	¢	End Date	¢	Grouped By So\$	4	¢	1
□ ☆	June_B11_C11	June_B11_C11	Sarah Smith		01/01/2020		12/31/2020		Value Propositi	۲	•	I
□ ☆	June_B11_C11	June_B11_C11	Sarah Smith		01/01/2020		12/31/2020		Qualification	۲	•	
□ ☆	June_B11_C11	June_B11_C11	Sarah Smith		01/01/2020		12/31/2020		Prospecting	۲	•	
□ ☆	June_B11_C11	June_B11_C11	Sarah Smith		01/01/2020		12/31/2020		Proposal/Price	۲	•	
□ ☆	June_B11_C11	June_B11_C11	Sarah Smith		01/01/2020		12/31/2020		Perception Ana	۲	•	

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

📚 🔹 Accounts 👻	Contacts 👻 C	Opportunities	• L	.eads 🔻 Caler	ndar		s 🔻	Quotes 👻	Targe	: Moc
Target Module (9)									Crea	ite
Filter • Create ⑧ Search	by name							C	■	0
Benchmark Name	🗙 🔻 is a	ny of		•	Ju	ine_B11_CØ			-	+
Frequency	🗙 👻 🛛 is a	ny of		-	M	onthly 🕴			-	+
Advanced Related To	×	ected User(s)		•	W	ill Westin 🛛			-	+
Results for Metric "June_B11_	C11_Invoice_Calcu	lations_Groupe	d_ł					Reset Cancel	Save	•
Name \$	Benchmark Na 🕯	Related To	\$	Start Date	¢	End Date	¢	Grouped By So4	•	>
☐ ☆ June_B11_C11	June_B11_C11	Will Westin		06/01/2020		06/30/2020		Value Propositi	۲	•
☐ ☆ June_B11_C11	June_B11_C11	Will Westin		06/01/2020		06/30/2020		Qualification	۲	•
☐ ☆ June_B11_C11	June_B11_C11	Will Westin		06/01/2020		06/30/2020		Prospecting	۲	•
☐ ☆ June_B11_C11	June_B11_C11	Will Westin		06/01/2020		06/30/2020		Proposal/Price		•

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

📚 -	Accounts 🔻	Contacts 👻	Opportunitie	s ▼ L	.eads 🔻 Ca	lendar	▼ Reports ▼	Quotes 👻	Target Modu
Target	Module (9)								Create
Filter 🔻 🖸	reate 🙁 Search	by name						C	
Benchmar	k Name	× -	is any of		•	ŀ	ine_B11_C8		- +
Frequency	1	× •	is any of		•	Y	early 🕄		- +
Advanced	Related To	× -	Selected User(s	.)	-	W	/ill Westin 🛛 🛞		- +
Results for	Metric "June_B11_	_C11_Invoice_C	Calculations_Gro	uped_ł				Reset Cancel	Save 👻
•	Name 🌲	Benchmark N	la♦ Related T	·	Start Date	\$	End Date 🔶	Grouped By So 🕯	٥
☆	June_B11_C11	June_B11_C1	11 Will Wes	tin	01/01/2020		12/31/2020	Value Propositi	• •
□ ☆	June_B11_C11	June_B11_C1	11 Will Wes	tin	01/01/2020		12/31/2020	Qualification	• •
□ ☆	June_B11_C11	June_B11_C1	11 Will Wes	tin	01/01/2020		12/31/2020	Prospecting	• •
	June_B11_C11	June_B11_C1	11 Will Wes	tin	01/01/2020		12/31/2020	Proposal/Price	•
☆	June_B11_C11	June_B11_C1	11 Will Wes	tin	01/01/2020		12/31/2020	Perception Ana	•

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

Filter 🔻	Create 😧 Search	by name		f						2	■	•
		• •	is any									
Frequen	cy	X -	is any	/ of		•		Nonthly			-	+
Advance	d Related To	× •	Selec	ted User(s)		•		im Brennan 🕹			-	+
Results f	or Metric "June_B11_	C11_Invoice	_Calcula	tions_Grouped_	J				Re	set Cancel	iave	•
-	Name 🜲	Benchmark	Na 🌩	Related To	¢	Start Date	¢	End Date	¢ G	Grouped By So¢	<	5
	lupe B11 C11	June_B11_	C11	Jim Brennan		06/01/2020		06/30/2020	V	alue Propositi	۲	•
<u></u>	Jane_Brit_erit_iii											
□ ☆ □ ☆	June_B11_C11	June_B11_	C11	Jim Brennan		06/01/2020		06/30/2020	Ç	(ualification	۲	•
□ ☆ □ ☆	June_B11_C11 June_B11_C11	June_B11_ June_B11_	C11 C11	Jim Brennan Jim Brennan		06/01/2020		06/30/2020	C P	Qualification	۲	•
	June_B11_C11 June_B11_C11 June_B11_C11	June_B11_ June_B11_ June_B11_	C11 C11 C11	Jim Brennan Jim Brennan Jim Brennan		06/01/2020 06/01/2020 06/01/2020		06/30/2020 06/30/2020 06/30/2020	C P P	Qualification Prospecting Proposal/Price	۲ ۲ ۲	• •

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

📚 🗸	Accounts 👻	Contacts 👻 O	pportunities 👻	Leads 🔻 Cale	endar 👻 Reports	▼ Quotes ▼	arget Modu
Target	Module (9)					I	Create
Filter 🔻 🕻	Create 🙁 Search	by name				C	
Benchma	irk Name	X 🔻 is ar	ny of	-	June_B11_C 🕲		- +
Frequenc	у	🗙 👻 is ar	ny of	-	Yearly 🕴		- +
Advanced	d Related To	× - Sele	cted User(s)	-	Jim Brennan 🕲		- +
Results fo	or Metric "June_B11_	C11_Invoice_Calcul	ations_Grouped_I			Reset Cancel	Save 👻
-	Name 🔶	Benchmark Na 🔷	Related To 🔶	Start Date	End Date	Grouped By So¢	۰
_ ☆	June_B11_C11	June_B11_C11	Jim Brennan	01/01/2020	12/31/2020	Value Propositi	• •
□ ☆	June_B11_C11	June_B11_C11	Jim Brennan	01/01/2020	12/31/2020	Qualification	• •
□ ☆	June_B11_C11	June_B11_C11	Jim Brennan	01/01/2020	12/31/2020	Prospecting	• •
□ ☆	June_B11_C11	June_B11_C11	Jim Brennan	01/01/2020	12/31/2020	Proposal/Price	۰ .
□ ☆	June_B11_C11	June_B11_C11	Jim Brennan	01/01/2020	12/31/2020	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 👻 Co	ontacts Opportunities 	Leads 🔻 Calendar 🖣	■ Reports ■ Quotes ■	Documents Emails	Campaigns
wB June_ ☆	📰 Manage Goals 🛛 😋 M	anage Studio Fields	Run Scheduler Now	Generate Scheduler	ancel Save
General Definitions Retention	on				
Automatic Computation Status		Tar	get Module		
Active		 Targ 	get Module		
Enable or Disable Benchmark Com	putation				
Group By Users		Mo	dule Field		
 ✓ 		~			
Having this option checked should metrics (basically no user filter, per	enable the calculation of Global metr instance metrics and per team metri	rics and Team Hav ics) field	ing this option checked should allo I which would become an addition	w the user to pick a custom module al Group By clause.	and a custom
Group By Module		Gro	oup By Field		
Accounts		▼ Mc	dified By		•
Group by Source Module		Gro	up by Source Field		
Create metrics for Users	Teams		Syster	m/Global	
✓	✓		~		
Calculate a value for each linked us	calcula	te a total value for each linke	d team Calcul	ate 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 calculati archive for each month	on and Enable or Disable calc archive for each quart	ulation and Enable or Disable ter archive for each ye	calculation and ear
Show More					~
Related - All Filter All Recor	ds Search				2 🖩 0

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

₩ •	Accounts 👻 Co	ontacts 🝷	Opportuni	ties 🔻	Leads 🔻	(Calendar	• \	vBenchma	irk 🔻
wB	Name June ☆	📑 Manag	e Goals	Ø ^e Ma	anage Stud	dio	Fields	⊛ Ru	ın Sched	uler N
Show Mo	ore									~
Related 👻	All Filter All Recor	ds Search							2 🖿	0
Us USER	RS (1)								+	•
	Full Name	User Name	\$	Title		¢	Departme	nt	:	
	Mihaela Bulacu	mbulacu								<u>\$</u> 5
Te TEAN	MS (1)								+	•
	Team Name			♦ Da	te Modified					
☆	West			04	/07/2020 04:	:50pi	m		۲	• •

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

Accounts Contact		
wB June 🏠	Manage Goals 🛛 😋 Manage S	Studio Fields 💿 Run Scheduler Now 📃 🚍 Configure Scheduler
ACCOUNTS [# 1]:	LBL_W_DATETIME from	m 🔟 Target Module = MIN (Date Created) filtered by All Accounts
efinition #1 Displayed as Minim filtered by All Accounts saved or splay Name	um Date Created and calculated	as MIN of Date Created (date_entered) from 🔥 Accounts
linimum Date Created		
ect Operation (what operation we sh	ould do with source data)	
lin		
ect Source Field (from where we get	data)	Select Destination Field (where to store the result)
ate Created		- LBL_W_DATETIME
er field used to group records (option	nal)	Date field used to limit record selection to evaluated time period (optional
er field used to group records (option ssigned to Filter • Create Search by name • Accounts • Contact Name	nal) s ▼ Opportunities ▼ Lead	Date field used to limit record selection to evaluated time period (optional Ignore Date Field s ◆ Calendar ◆ Reports ◆ Quotes ◆ Documents ◆ Emails
er field used to group records (option ssigned to Filter • Create Search by name • Accounts • Contact WB June ☆ E	nal) s • Opportunities • Lead Manage Goals Ø: Manage	Date field used to limit record selection to evaluated time period (optional Ignore Date Field s Calendar ▼ Reports ▼ Quotes ▼ Documents ▼ Emails Studio Fields
er field used to group records (option ssigned to Filter • Create Search by name • Accounts • Contact WB June ☆ E ACCOUNTS [# 2]:	nal) s • Opportunities • Lead Manage Goals @ Manage LBL_W.	Date field used to limit record selection to evaluated time period (optional Ignore Date Field s • Calendar • Reports • Quotes • Documents • Emails Studio Fields Image: Reports • Quotes • Documents • Emails Studio Fields Image: Reports • Quotes • Documents • Emails INTEGER from Target Module = COUNT
er field used to group records (option ssigned to Filter Create Search by name Filter Create Search by name Accounts Contact Mame Contact Mame Contact Accounts (Eagle) Accounts (Ea	s ▼ Opportunities ▼ Lead Manage Goals of Manage LBL_W Accounts and calculated as CO v_integer_c) from ऒ Target	Date field used to limit record selection to evaluated time period (optional Ignore Date Field s Calendar Reports Quotes Documents Emails Studio Fields Run Scheduler Now Generate Scheduler INTEGER from Target Module = COUNT filtered by All Accounts UNT of Accounts filtered by All Accounts Module
er field used to group records (option ssigned to Filter Create Search by name Accounts Contact MB Name June Accounts Contact Accounts [# 2]: efinition # 2 Displayed as No of saved on field LBL_W_INTEGER (sapay Name No of Accounts	nal) s Opportunities Lead Manage Goals Manage LBL_W. Accounts and calculated as CO v_integer_c) from M Target	Date field used to limit record selection to evaluated time period (optional Ignore Date Field
er field used to group records (option ssigned to Filter • Create Search by name • Accounts • Contact • June \$\Phi = Contact • ACCOUNTS [# 2]: • ACCOUNTS [# 2]: • Contact •	nal) s • Opportunities • Lead Manage Goals @Manage LBL_W Accounts and calculated as CO v_integer_c) from M Target nould do with source data)	Date field used to limit record selection to evaluated time period (optional Ignore Date Field s Calendar Reports Quotes Studio Fields Image: Reports INTEGER from Target Module = COUNT filtered by All Accounts Filtered by Module Counts
er field used to group records (option ssigned to Filter Create Search by name Filter Create Search by name Accounts Contact Mame Contact Mame Contact Accounts Contact Accounts Contact Filter Create Search by name Accounts Contact Filter Create Search by name Accounts Contact Filter Create Search by name Filter Create Search by name	nal) s ← Opportunities ← Lead Manage Goals @ Manage LBL_W. Accounts and calculated as CO w_integer_c) from ஂ Target nould do with source data)	Date field used to limit record selection to evaluated time period (optional Ignore Date Field s Calendar s Calendar Quotes Documents Emails Studio Fields Image Run Scheduler Now INTEGER from Intreser Field Module = COUNT UNT of Accounts filtered by All Accounts Module
er field used to group records (option ssigned to Filter Create Search by name Accounts Contact Mame June Accounts Contact Accounts [# 2]: efinition # 2 Displayed as No of saved on field LBL_W_INTEGER (saved on field (saved on field LBL_W_INTEGER (saved on field (saved on	nai) s Opportunities Lead Manage Goals Manage LBL_W. Accounts and calculated as CO v_integer_c) from M Target nould do with source data)	Date field used to limit record selection to evaluated time period (optional Ignore Date Field s • Calendar • Reports • Quotes • Documents • Emails Studio Fields • Run Scheduler Now • Generate Scheduler INTEGER from • Target Module = COUNT filtered by All Accounts UNT of Accounts filtered by All Accounts Module
er field used to group records (option ssigned to Filter	s Opportunities Lead Manage Goals Manage Goals Manage Manage LBL_W Accounts and calculated as CO w_integer_c) from Target hould do with source data) e the result)	Date field used to limit record selection to evaluated time period (optional Ignore Date Field s • Calendar • Reports • Quotes • Documents • Emails Studio Fields Run Scheduler Now • Generate Scheduler INTEGER from Target Module = COUNT filtered by All Accounts UNT of Accounts filtered by All Accounts Module
er field used to group records (option ssigned to Filter Create Search by name Accounts Contact MB June Accounts ACCOUNTS [# 2]: efinition # 2 Displayed as No of saved on field LBL_W_INTEGER (saved on field LBL_W_INTEGER (splay Name loo of Accounts lect Operation (what operation we sh count lect Destination Field (where to store BL_W_INTEGER	s ▼ Opportunities ▼ Lead Manage Goals Ø; Manage LBL_W. Accounts and calculated as CO v_integer_c) from M Target hould do with source data) e the result)	Date field used to limit record selection to evaluated time period (optional lgnore Date Field Ignore Date Field s • Calendar • Reports • Quotes • Documents • Emails Studio Fields Image: Reports • Quotes • Documents • Emails JNTEGER from Image: Reports • Quotes • Documents • Emails JNTEGER from Image: Reports • Quotes • Documents • Emails UNT of Accounts Accounts filtered by All Accounts Module Image: Reports • Quotes • Documents
er field used to group records (option ssigned to Filter Create Search by name Accounts Contact MB Name Contact Name Contact Accounts (# 2): efinition # 2 Displayed as No of saved on field LBL_W_INTEGER (v splay Name loo of Accounts lect Operation (what operation we sh count lect Destination Field (where to store BL_W_INTEGER er field used to group records (ontion	s Copportunities Lead Manage Goals Manage LBL_W LBL_W Accounts and calculated as CO v_integer_c) from Target nould do with source data) the result) nal)	Date field used to limit record selection to evaluated time period (optional Ignore Date Field Calendar Reports Quotes Documents Emails Studio Fields ORUN Scheduler Now Generate Scheduler INTEGER from Target Module = COUNT filtered by All Accounts UNT of Accounts filtered by All Accounts Module Date field used to limit record selection to evaluated time period (optional)

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:

📚 🔹 Accounts 👻	Contacts 👻 C)pportunities 👻 L	eads 🔻 Calenda	ar 🔻 Reports 🔻	Quotes 👻 Ta	arget Module
Target Module (1)						Create »
Filter - Create 🙁 Search	by name				Ø	III 0
Benchmark Name	× 🗸 is a	any of	•	June_B14_C®		- +
Calculated By	🗙 👻 is a	any of	•	User 🕄		- +
Advanced Related To	× • Sel	ected User(s)	•	Mihaela B 🔇		- +
Results for Metric "June_B14_	_C14_Account Calcu	llations Grouped by			Reset Cancel	Save 👻
Name 🗢	Benchmark Na 🖨	Related To	Start Date 🔶	End Date 🔶	Grouped By So🖨	٥
□ ☆ June_B14_C14	June_B14_C14	Mihaela Bulacu	01/01/2020	12/31/2020	Administrator	•

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
- <u>Creating Goals</u>
- <u>Uploading Goals</u>

Goal Formulas

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

Modules	C Edit Fields Edit Field ×			>	He for the second state.
🖲 🧰 Dropbox 🗟 🛅 Employees *	Save Cancel	Formula Builder		Select a Data Type	mines what kind of tered for the field.
	Data Type: Decimal Image: Comparison of Com	Related Field Rollup	15")		red into fields that a type. he field. The name c and must not underscores are the label that will n the module Label is used to a code.
🗄 🚞 Projects * 🕀 🚞 Quoted Line Items	Default Value:	Search Functions X	Search Fields	×	ta type selected for of the following
8 🚰 Quotes 8 🔄 Referrals 9 🚰 Referrals Type 8 🚰 Revenue Line Items	Max Size: 18 Enable Range Search: Precision: 8 Centerated Water @	dayofweek in a second s	\$calculation_type \$date_entered \$date_modified	3	for the field: mporarily while a field and can be ser for the type of
Target Module Targets Targets Tasks Tasks	Formula Uependent: Required Field:	monthotyear max	\$description \$goal_valid_start_date \$goal_valid_until \$goal_value	2 2	ly seen within Studi and can be used to administrators. pear in the field.
WBenchmark wBenchmark	Reportable: 2 Audit: Personal Information:	min III -	\$my favorite	0	ue. late checkbox in

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.

Name					
Won Sale	s Opportunities Goal			Cancel	Save
Business Card Def	ault Goal Values				
Goal Key		Goal Fo	ormula (add to wBenchma	rk Target module using	Sugar
won_sales opportu	inities goal	Studio)			
Assigned to		Teams			
Administrator		🗙 👻 Globa	I	- *	+
Related wBenchmark	Goals				
		Cool Valid Chart Date	Cool Valid Lintil	Coolycelyce	

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 ("_")

wG Won Sales	Opportunities Goal			☆ Cancel	Save
Business Card Defau	lt Goal Values				
oal Key		Goal For Studio)	mula (add to wBenchma	rk Target module using	Sugar
/on_sales_opportun	ities_goal	goal("w	on_sales_opportuniti	es_goal")	
ssigned to		Teams			
dministrator		🗙 👻 Global		→ ★	+
elated wBenchmark G	pals				
Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	

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").

WG Won Sales Opportunities Goal				☆	Cancel
Business Card Default C	Goal Values				
Goal Key			Goal Formula (add to wB	enchmark Target mod	ule using Sugar Studio
won_sales_opportuniti	es_goal		goal("won_sales_opp	ortunities_goal")	
Assigned to			Teams		
Administrator		× -	Global		- *
Related wBenchmark Goal	S				
Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	+
Related wBenchmark Goal	S Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	+

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

Won Sales Opportunities Goal Business Card Default Goal Values Default User Daily Goal Default User Veekly Goal 1 11 Default User Weekly Goal Default Default User Veekly Goal	efault Team Daily Goal
Business Card Default Goal Values Default User Daily Goal Default User Daily Goal 1 11 Default User Weekly Goal Default Default User Veekly Goal 2 22	efault Team Daily Goal I efault Team Weekly Goal
Default User Daily Goal Default User Daily Goal Default User Weekly Goal Default User Weekly Goal Default User Weekly Goal 22	efault Team Daily Goal I efault Team Weekly Goal
1 11 Default User Weekly Goal De 2 22	l efault Team Weekly Goal
Default User Weekly Goal De 2 2	efault Team Weekly Goal
2 22	
	2
Default User Monthly Goal De	efault Team Monthly Goal
3 33	3
Default User Quarterly Goal De	efault Team Quarterly Goal
4 44	4
Default User Yearly Goal Default User Yearly Goal	efault Team Yearly Goal
5 55	5

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.

wG Won Sales	Opportunities Goal	☆	+	Create Goal 🔔 Uploa	ad Goals Edit 👻
Business Card Default	Goal Values				
Goal Key won_sales_opportunit	ies_goal		Goal Formula (add to wl goal("won_sales_opp	Benchmark Target module portunities_goal")	using Sugar Studio)
Assigned to			Teams		
Administrator			Global (Primary)		
Related wBenchmark Goa	ls				
Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	+

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

wG Won Sales (Opportunities Goal	☆	0	Create Goal 🔹 Up	load Goals 🛛 Edit 👻
Business Card Default G	ioal Values				
oal Key on_sales_opportunitie	es_goal		Goal Formula (add to wi goal("won_sales_opp	Benchmark Target modu portunities_goal")	ule using Sugar Studio)
signed to			Teams		
dministrator			Global (Primary)		
elated wBenchmark Goals	5				
Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	+
Us • Requi •	Monthly X -	(Required) mm 🛍	(Required) mm 🛍	Required	X Cancel

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



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

📚 🗸 Accounts 👻 Contact	s 🔻 Opportunities 🔻 Le	ads 🔻 Calendar 👻	Reports 🔻 Quotes 🔹	Documents 👻 I	Emails 🔻 wBenchmark Goal
wG Won Sales Opportu	nities Goal 🕁		0	Create Goal 👲 Up	oload Goals Edit 👻 »
Business Card Default Goal Values					
Goal Key won_sales_opportunities_goal Assigned to Administrator		Goal F goal(' Team: Globa	ormula (add to wBenchm "won_sales_opportunit s al (Primary)	ark Target module using t ies_goal")	; Sugar Studio)
Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	+
User Required	▼ Monthly × ▼	(Required) mm 🛗	(Required) mm 🛍	Required	Cancel Save
User Re Team ter All Records S User in Te	earch				2 🖩 🔿

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

📚 🕶 Accounts 👻 Contacts 👻	Opportunities 👻 Le	ads 🔻 Calendar 👻	Reports 👻 Quotes	▼ Documents ▼ E	Emails 🔻 wBenchmar	k Goa
WON Sales Opportunitie	s Goal ☆		0	Create Goal 🔔 Up	load Goals Edit 👻	2
Business Card Default Goal Values						
Goal Key won_sales_opportunities_goal		Goal I goal(Formula (add to wBenchm "won_sales_opportuni	ark Target module using ties_goal")	s Sugar Studio)	
Assigned to Administrator		Team Glob	s al (Primary)			
Related wBenchmark Goals						_
Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	+	
User Required	Monthly 🗙 🗸	(Required) mm 🛍	(Required) mm 🛗	Required	Cancel Save	
Related - All Filter All Records Search	Daily				2 🖩	0
	Weekly					
	Monthly					
	Quarterly					
	Yearly					

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



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:



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

wG Won Sales Opportunitie	s Goal 🟠		Error Plea with corre	ese fill in all fields for r ect values	elated goal
Business Card Default Goal Values				4	
soal Key won_sales_opportunities_goal ussigned to Administrator Related wBenchmark Goals		Goal F goal(Team Glob	ormula (add to wBenchm 'Won_sales_opportuni s al (Primary)	ark Target module using S ties_goal")	iugar Studio)
Relate to	Calculation Type	Goal Valid Start Date	Goal Valid Until	Goal value	+
User 🔹 Mihaela Bul 🗙 👻	Monthly x -	06/23/2020 🛗	06/25/2020 🛗	w	X Cancel
elated - All Filter All Records Search.					2 🖩 0

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.



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

al Key Goal Formula (add to wBenchmark Target module using Sugar St on_sales_opportunities_goal goal("won_sales_opportunities_goal") siened to Teams	tudio)
izned to Teams	
Iministrator Global (Primary)	
lated wBenchmark Goals	
Relate to Calculation Type Goal Valid Start Date Goal Valid Until Goal value	+
Js Mihaela Bulacu Monthly 06/23/2020 06/25/2020 50.00 ₢ ┏ –	e An

 $\ensuremath{\textbf{Create Goal}}$ - pushing this button will add another row of fields necessary to define a new goal.

wG Won Sales (Opportunities Goa	☆	+	Create Goal 🔔 Up	load Goals 🛛 Edit 👻
Business Card Default G	ioal Values				
ioal Key von_sales_opportunitie	es_goal		Goal Formula (add to goal("won_sales_o	wBenchmark Target modu pportunities_goal")	le using Sugar Studio)
ssigned to			Teams		
dministrator			Global (Primary)		
elated wBenchmark Goal	5				
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	C – 41

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

wG Won Sales (Opportunities Goa	☆	-	- Create Goal 🔔 Up	load Goals 🛛 Edit 🚽
Business Card Default G	ioal Values				
ioal Key von_sales_opportunitie	es_goal		Goal Formula (add to goal("won_sales_o	wBenchmark Target mode pportunities_goal")	ule using Sugar Studio)
ssigned to Administrator			Teams Global (Primary)		
elated wBenchmark Goals	5				
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	C • 4
					Edit Goal

 $\ensuremath{\textbf{Remove Goal}}$ - pushing this button will remove the goal from the wTargetGoal module.

wG Won Sales (Opportunities Goal	☆		Create Goal	L Upload Goals	Edit 👻
Business Card Default G	oal Values		_			
ioal Key von_sales_opportunitie	es_goal		Goal Formula (add to goal("won_sales_o	wBenchmark Target pportunities_goal	: module using Suga ")	r Studio)
ssigned to			Teams			
dministrator			Global (Primary)			
elated wBenchmark Goals	5					
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	ľ	- 4
					Remo	ove Goal
lated 🔻 📶 Filter All R	Records Search					C 🖩 0

 $\ensuremath{\textbf{Duplicate Goal}}$ - this option allows the user to create another goal with the same field values.

wG Won Sales C	Opportunities Goa		-	Create Goal	load Goals Edit 👻
Business Card Default G	oal Values				
oal Key von_sales_opportunitie	es_goal		Goal Formula (add to goal("won_sales_o	wBenchmark Target modu pportunities_goal")	ule using Sugar Studio)
ssigned to			Teams		
dministrator			Global (Primary)		
elated 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	c – 2

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
- $\bullet\,$ 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**".

📚 🔹 Accounts 👻	Contacts 🔻 Opp	oortunities 🔻 Leads 🔻	Calendar 🔻 Repo	orts 👻 wBenchmark	Goal Groups 🗨
wG Won Sales	Opportunities Go	al ☆	+ Create Goal	🛓 Upload Goals	Edit 👻 »
Business Card Default	Goal Values				
Goal Key won_sales_opportunit	ies_goal	Goal Studi goal	Formula (add to wBench o) ("won_sales_opportu	imark Target module usi nities_goal")	ng Sugar
Assigned to		Team	ıs		
Administrator		Glob	al (Primary)		
Related wBenchmark Goa	ls				
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	I
Related - All Filter All	Records Search				2 🖩 0

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.



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 - mm + Numeric representation of a month, with leading zeros - dd - D & Q of the month, 2 digits with leading zeros - yyyy = A full numeric representation of a year, 4 digits	
	Goal Valid Until	Goal Valid Until	Accepted format mm-dd-yyyy - mm = Numeric representation of a month, with leading zeros - dl = 0 Boy of the month, 2 digits with leading zeros - yyyy = 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: * Choose File No file chose	en 🕡 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.

Step	1: Upload Import Select a file on your compute Click to : Click to Hide Imp	File r that contains the data that you would like to im ort Template File Guidelines Or Download	Download a sample import file containing a header row of the module fields. The file can be used as a template to create an import file containing the data that you would like to import. Import File Template 3			
	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 Goal Valid Start Date Goal Valid Start Date		Accepted Values: Daily, Weekly, Monthly, Quarterly OR Yearly			
			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	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	Goal Value	lies only noint () for desimal constator. Don't include other senarators or use other formats_			

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 Tovalue is a user**, the teams of the created record will be:

- User private team
- $\bullet\,$ 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
- <u>wBenchmark Bullet Leader Chart Dashlet</u>
- wBenchmark Pie and Area Chart Dashlet

📚 🕶 Accounts 👻 Contacts	 Opportun 	ities 👻 Leads 👻 Calendar	✓ Reports ▼	Quotes 🔻	wBenchmark
Add a Sugar Dashlet®					Cancel
wBenchmark					
Title	\$	Description		\$	
wBenchmark Bullet Leader Chart Dashlet		Display the wBenchmark compute	d results against a g		
wBenchmark Line and Area Chart Dashlet		Display the wBenchmark compute	d results on a line o	r 👁	
wBenchmark Pie and Area Chart Dashlet		Display the wBenchmark compute	d results on a pie ch		

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.

Woenermark eine and Area Chart Dashlet					Concer
Chart Type			Auto Refresh		
Line Chart 🔹		None			
Select wBenchmark Record			Select Benchmark Definition		
Select		-	Select		
Select Calculation type			Select "Grouped By" type		
select		-	Ignore this option		
Disolay Only for Time Period					
This Week					
elect I shel Field			Currency Symbol		
Nothing selected		-	User Preference		
-			Convert Currencies when available	e to	
elect Order by Field			Select Order By Direction		
lothing selected		-	Nothing selected		
Irder Results by			Order Direction		
Decimal Precision		Decimal Separator			Thousand Separator
Jser Preference	-	User Preference		•	User Preference
isplay Numbers with decimals number		Display Numbers using following deci	imal separator		Display Numbers using following thousand separator
ate Format		Time Format			Week Days And Months Language
mplicit Format (mm/dd/yyyy)	•	Implicit Format (hh:mm am)		•	Default to English
/hen 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
elect linked users for display					
lothing selected					
Jsers linked to selected wBenchmark record.					
elect linked teams for display					
Nothing selected					
eams linked to selected wBenchmark record. Important: The comp rom selected teams.	utations for teams v	will be displayed only if the selected wBend	chmarkrecord is configured with "Calculate	For Tea	ams? " to "Yes", otherwise will be displayed only the computation for the selected u
elect users from linked teams for display					
ser from the linked teams to the selected wBenchmark record					
The second second second second matched matched fillers (1900) second.					

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

\$	•	Accounts •	 Contacts 	Opportunities	✓ Leads ✓			
wBe	wBenchmark							
wBe Dash	nchm hlet	nark Line a	and Area Char	t 🖬	~ ~ ¢			
Ma	ximur	n Invoice			Show legend			
	\$100k							
inities	\$90k							
from Opportu	\$80k			•				
MAX(Likely)	\$70k							
	\$60k							
			06/0	1/2020				

• Vertical Stacked Bar



• Stacked Area



Auto Refresh - this option will automatically refresh the dashlet.



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.

 ${\bf Currency}\ {\bf Symbol}\$ - This field displays all system currency values and Convert Currencies when available

Select Order by Field - Order results by the selected field

 ${\bf Select} \ {\bf Order} \ {\bf By} \ {\bf Direction} \$ - This field have two options available: Ascending and Descending

wBenchmark Line and Area Cha	rt Dashlet			Cancel Save
Chart Type		Auto Refresh		
Line Chart	•	None		•
Display Only for Benchmark Record		Benchmark Definition	n	
Select	•	Select		
Display only Calculation Type	Display only "Groupe	ed By" type	Frequency	
Ignore this option Ignore this option		• •	Select	•
Display Only for Time Period				
This Week				•
Select Label Field		Currency Symbol		
Nothing selected 🔹		User Preference •		
		Convert Currencies wh	en available to	
Select Order by Field		Select Order By Direc	tion	
Nothing selected	•	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.

× •
Deselect All
~
~

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.

wBenchmark Line and Area Chart Da	shlet	Cancel Save
Decimal Precision	Decimal Separator	Thousand Separator
User Preference 🔹	User Preference 👻	User Preference
Display Numbers with decimals number	Display Numbers using following decimal separator	Display Numbers using following thousand separator
Date Format	Time Format	Week Days And Months Language
Implicit Format (mm/dd/yyyy) 🛛 👻	Implicit Format (hh:mm am) 🛛 👻	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
Break Down Result by Module Field Values?		
No		-
Break down by Module Field Values		
Select linked users for display		
Nothing selected		-
Users linked to selected wBenchmark record.		
Select linked teams for display		
Nothing selected		-

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

Select users from linked teams for display			
1			
Select All	Deselect All		
West	R		
Jim Brennan	~		
Max Jensen	~		
Sally Bronsen	~		
Sarah Smith	~		
Jim Brennan, Max Jensen, Sally Bronsen, Sarah Smith	× -		
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 X - is any of - +
Enter new filter name

 ${\bf Save}\,$ - Saves the configurations made for the dashlet

 ${\bf Cancel}\,$ - 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:

		we as Image to Cliphoard
Ma	ximum Invoice	Hide legen
	\$100k	User: Chris Olliver
		🔵 User: Jim Brennan
	•	User: Max Jensen
s	\$90k	User: Sally Bronser
nitie		User: Sarah Smith
ortur		User: Will Westin
dd0 I	\$80k	
from		
(ely)		
X(Lil	\$70k	
MAX(Li		
	Dashlet wBenchmark Lir	ne and Area Chart
	Dashler	
	Dashlet wBenchmark Lir Dashlet	ne and Area Char

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.

wBenchmark Bullet Leader Chart Dashl	et		Cancel Sa	
Module				
Target Module				
Inner Bar Series		Inner Bar Color Series		
Invoice Avg 👻		#000080		
Outer Bar Series		Outer Bar Color Series		
Invoice Max 🔹		#32cd32		
Goal Series		Goal Color Series		
Ignore this series	× •	#0e0f0e		
Series Label	Ranking sort field		Ranking sort type	
Nothing selected	 Inner Series 	•	Descending	
X axis label	Max value to show on X a	xis	Currency symbol	
X axis label	Max value to show on	X axis	User Preference	
Y axis label	Display % on right Y axis		Y axis right label	
Y axis label	Ignore this option	-	Y axis right label	
Display Only for Benchmark Record	Display only Calculation T	уре	Display only "Grouped By" type	
Ignore this option	 Ignore this option 	•	Ignore this option	
Frequency	.0		.0.101 C 111 C 111	
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.

	Chart Dashlet			Cancel Sav
Module				
Target Module				
Inner Bar Series		Inner Bar Color S	eries	
Invoice Avg 👻		#000080		
Outer Bar Series		Outer Bar Color S	Series	
Invoice Max 👻		#32cd32		
Goal Series		Goal Color Series		
Ignore this series × •		#0e0f0e		
Series Label	Ranking sort field		Ranking sort type	
Nothing selected	 Inner Series 	•	- Descending	
X axis label	Max value to show	on X axis	Currency symbol	
X axis label	Max value to sho	ow on X axis	User Preference	

 ${\bf Module}~$ - 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.

wBenchmark Bullet Leader Chart Dashlet Module Target Module Invoice Avg Outer Bar Series Invoice Max	Cancel Save
Module Target Module Target Module Invoice Avg Outer Bar Series Invoice Max	•
Target Module #000080 Invoice Avg #000080 Outer Bar Series Outer Bar Color Series Invoice Max #32cd32	•
Target Module #000080 Invoice Avg Øuter Bar Series Outer Bar Series Outer Bar Color Series Invoice Max #32cd32	
Invoice Avg #000080 Outer Bar Series Outer Bar Color Series Invoice Max #32cd32	
Outer Bar Series Outer Bar Color Series Invoice Max #32cd32	-
Invoice Max • #32cd32	
Goal Series Goal Color Series	
Ignore this series × • #0e0f0e	
Series Label Ranking sort field	Ranking sort type
Nothing selected Inner Series	Descending -
X axis label Max value to show on X axis	Currency symbol
X axis label Max value to show on X axis	User Preference

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.

📚 🕶 Accounts 💌 Contacts 👻	Opportunities 👻	Leads 🔻 Calendar ·	✓ Reports ▼ Quotes ▼ Documents
wBenchmark Bullet Leader Chart Das	shlet		Cancel Save
Module			
Target Module			▼
Inner Bar Series		Inner Bar Color Series	3
Invoice Avg	•	#000080	•
Outer Bar Series		Outer Bar Color Serie	s
Invoice Max	-	#32cd32	•
Goal Series		Goal Color Series	
Ignore this series	× •	#0e0f0e	
Series Label	Ranking sort field		Ranking sort type
Nothing selected -	Inner Series	-	Descending -
X axis label	Max value to show o	n X axis	Currency symbol
X axis label	Max value to show	w on X axis	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.

wBenchmark Bullet Leader	Chart Dashlet			Cancel Save
Module				
Target Module				-
Inner Bar Series		Inner Bar Color Se	eries	
Invoice Avg 👻		#000080		
Outer Bar Series		Outer Bar Color S	eries	
Invoice Max 👻		#32cd32		
Goal Series		Goal Color Series		
Ignore this series	× •	#0e0f0e		
Series Label	Ranking sort field		Ranking sort type	
Nothing selected Inner Series		✓ Descending		
X axis label	Max value to show o	on X axis	Currency symbol	
X axis label	Max value to sho	w on X axis	User Preference	-



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'.

wBenchmark Bullet Leader	Cancel Save								
Module									
Select				•					
Inner Bar Series Nothing selected Outer Bar Series Nothing selected		Inner Bar Color S	Series	_					
		#000080 Outer Bar Color Series #32cd32							
					Goal Series		Goal Color Serie	S	
					Nothing selected	•	#0e0f0e		
Series Label	Ranking sort field		Ranking sort type	1					
Nothing selected	✓ Inner Series		▼ Descending	•					
X axis label	Max value to show	on X axis	Ascending						
X axis label	Max value to sho	w on X axis	Descending						

 $\boldsymbol{X} \text{ axis label }$ - 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.

😻 🔻 Accounts 👻 Col	ntacts 👻 Opportunities 👻	Leads 🔻 Calen	dar ▼ Reports ▼ Quotes ▼ Docume	
wBenchmark Bullet Leader	Chart Dashlet		Cancel Save	
Inner Bar Series		Inner Bar Color	Series	
Nothing selected	•	#000080		
Outer Bar Series		Outer Bar Color Series		
Nothing selected	•	#32cd32		
Goal Series		Goal Color Serie	15	
Nothing selected -		#0e0f0e		
Series Label	Ranking sort field		Ranking sort type	
Nothing selected	▼ Inner Series		- Descending	
X axis label	Max value to show	on X axis	Currency symbol	
Sum of Amount	700000		User Preference	
Y axis label	Display % on right Y	axis	Y axis right label	
Y axis label	Ignore this option	n	 Y axis right label 	



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

 ${\bf Display\ currency\ symbol\ }$ - 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:

- ${\bf Users}\,$ - 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.



- ${\bf Global}\,$ - 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 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.

wBenchmark Bullet Leader Chart Dashlet	t			Cancel Sav
		U		
Display Only for Benchmark Record	Display only Calculation T	уре	Display only "G	rouped By" type
une_B11_C11_Invoice_Calculations 🝷	User		▪ Users & Mod	ule Field
Frequency	[Number of previou	s months to display	
Monthly	•	5		
Decimal Precision	Decimal Separator			۵
User Preference 🔹	User Preference	Show all		
Display Numbers with decimals number	Display Numbers using follo			
Date Format	Time Format	1		
mplicit Format (mm/dd/yyyy) 🔹	Implicit Format (hh:m	2		
When date is displayed use the above format to display	When time is displayed use display	3		
Auto Refresh		4		
Every 1 Minutes				
		5		

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.

WBenchmark Bullet Leader Chart Dashlet	t		Cancer	
		0	0	
Display Only for Benchmark Record	Display only Calculation Type		Display only "Grouped By" type	
une_B11_C11_Invoice_Calculations 🝷	User	-	Users & Module Field	
requency Number of		Number of previous mo	evious months to display	
Monthly	•	5		
Decimal Precision	Decimal Separator		Thousand Separator	
User Preference 🔹	User Preference	•	User Preference	
Display Numbers with decimals number	Display Numbers using follow	ving decimal separator	Display Numbers using following thousand separa	
Date Format	Time Format		Week Days And Months Language	
mplicit Format (mm/dd/yyyy) 🔹	Implicit Format (hh:mr	mam) 🔻	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	
Auto Refresh				
Every 1 Minutes				

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.



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

wBenchmark Pie and Area Chart Dashle	et		Cancel Sa		
Module		Display Only for Benchm	nark Record		
Target Module 🔹		June_B11_C11_Invoic	June_B11_C11_Invoice_Calculations_Grouped_by_User		
Display only Calculation type	Display only "Grouped I	3y" type	Frequency		
User	Users & Module Fiel	d 👻	Monthly		
Display Only for Time Period					
All Times					
Label Field		Value Field			
Related To	× •	Invoice Avg	×		
Order by Field		Order By Direction			
nvoice Avg	•	Ascending			
Order Results by		Order Direction			
Γορ / Bottom N source	Display Top / Bottom N	Records	Group Non Top / Bottom as		
Order by Field 🗸	0		Others O		
Choose from where "Top / Bottom N" will be calculated	Display only Top / Bottom display the TOP records, o BOTTOM records, 0 or em	N results. If N > 0 we will otherwise we will display the poty will disable this	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.

			Capcal			
wBenchmark Pie and Area Chart Dashle	et		Cancel Sav			
Module		Display Only for Benchn	nark Record			
Target Module	•	June_B11_C11_Invoice_Calculations_Grouped_by_User				
Display only Calculation type	Display only "Grouped I	By" type Frequency				
User	 Users & Module Fiel 	d 🗸 Monthly				
All Times Label Field		Value Field	•			
Related To	× •	Invoice Avg				
Order by Field		Order By Direction				
Invoice Avg	-	Ascending -				
Order Results by		Order Direction				
Top / Bottom N source	Display Top / Bottom N	Records Group Non Top / Bottom as				
Order by Field -	0		Others O			
Choose from where "Top / Bottom N" will be calculated	Display only Top / Bottom display the TOP records, o BOTTOM records. 0 or em	N results. If N > 0 we will otherwise we will display the noty 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.



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

 ${\bf Currency\ Symbol}~$ - This field displays all system currency values and Convert Currencies when available

Select Order by Field - Order results by the selected field

 ${\ensuremath{\textbf{Select}}\xspace{\ensuremath{\textbf{Order}}\xspace{\ensuremath{\textbf{By Direction}}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{C}}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{C}}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{C}}\xspace{\ensuremath{\textbf{B}}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{Order By Direction}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{Order By Direction}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{Select Order By Direction}\xspace{\ensuremath{\textbf{B}}\xspace{\ensuremath{\textbf{D}}\xspace{\ensuremath{\textbf{Order By Direction}\xspace{\ensuremath{\textbf{O}}\xspace{\ensuremath{\textbf{O$

 $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 $% \mathcal{A}$ - 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.

 ${\bf Save}\,$ - Saves the configurations made for the dashlet

 ${\bf Cancel}\,$ - The configurations made for the dashlet are canceled

 ${\bf Legend}\,$ - 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.







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.

Ta	Target Module (6)									
Filt	er 🕶 🕻	create 🙁 Search by name								
Ber	nchma	rk Name 🗙 👻				•	Count	Calls 🛛		
Fre	quenc	y X -	is any of	is any of 🗸 🗸 🦉 🦉						
Res	Results for Metric "Count Cells" Top 3									
	-	Name	Related To	\$	count -	Start Date	\$	End Date		
	☆	Count Calls - User #Max Jensen - Weekly - 2019-08-25 - Grou	Max Jensen		13	08/25/20	9	08/31/2019		
	☆	Count Calls - User #Sarah Smith - Weekly - 2019-08-25 - Gro	Sarah Smith		11	08/25/20	9	08/31/2019		
	☆	Count Calls - User #Chris Olliver - Weekly - 2019-08-25 - Gro	Chris Olliver		8	08/25/20	9	08/31/2019		
	☆	Count Calls - User #Jim Brennan - Weekly - 2019-08-25 - Gro	Jim Brennan		5	08/25/20	9	08/31/2019		
	☆	Count Calls - User #Oana Lusca - Weekly - 2019-08-25 - Gro	Oana Lusca		5	08/25/20	9	08/31/2019		
	☆	Count Calls - User #Will Westin - Weekly - 2019-08-25 - Grou	Will Westin		4	08/25/20	9	08/31/2019		
4						Botto	m 3			

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							
larget Module							
Display Only for Benchmark Record		Display only Calculation type		Display only "Grouped By" type			
Count Calls	•	Weekly -		Users			
Display Only for Time Period		Start Date		End Date			
Custom Date Range	-	08/10/2019		08/17/2019			
Label Field			Value Field				
Assigned to		× •	count		×		
Drder by Field			Order By Direction				
count		•	Descending				
Order Results by			Order Direction				
Top / Bottom N source	A source Display Top / Bottom N !			Group Non Top / Bottom as			
Order by Field	•	3		Others			
Choose from where "Top / Bottom N" will be calculated		Display only Top / Bottom N results. otherwise we will display the BOTTO	If N > 0 we will display the TOP records, M records. 0 or empty will disable this	Label under which should display results from outs	ide of "Top / Bottom		
Decimal Precision		Decimal Separator		Thousand Separator			
User Preference	-	User Preference	•	User Preference			
Display Numbers with decimals number		Display Numbers using following dee	cimal separator	Display Numbers using following thousand separator			
Date Format	Time Format			Week Days And Months Language			
Implicit Format (mm/dd/yyyy)	-	Implicit Format (hh:mm am) –	Default to English			
When date is displayed use the above format to display		When time is displayed use the above	e format to display	Display the Week Days and Months on User Prefer	red Language		
Currency Symbol			Auto Refresh				
User Preference		•	None				



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.



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			Value Field				
Assigned to		× •	count				
Order by Field			Order By Direction				
count		•	Ascending				
Order Results by			Order Direction				
Top / Bottom N source		Display Top / Bottom N Records					
Order by Field	•	0					
Please Select Top / Bottom N source	×	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					
Don"t use Top / Bottom functionality							
		Display Numbers using following decir	mal separator				
Label Field		Time Format					
Value Field		Implicit Format (hh:mm am) -					
Table Field		When time is displayed use the above format to display					
Order by Field			Auto Refresh				
User Preference		•	None				
Convert Currencies when available to							



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

Last Modified: 2021-05-18 03:50:03