

Installation & User Guide

Congratulations on choosing Hoopla Performance. You're just a few steps away from gaining better visibility of your sales projections.

Hoopla Performance Installation

Click "Get it Now" from the Appexchange listing and follow the instructions on the screen.

Package Installation Details Help for this Page ?

Package Name	Performance
Version Name	August 2010
Version Number	1.0
Publisher	Hoopla Software
Description	Hoopla Performance lets you know where you stand at all times through powerful visualizations of your closed business and projections.

Continue **Cancel**

Step 1. Approve Package API Access Step 1 of 2

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects
This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Ideas	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Products	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Solutions	✓	✓	✓	✓

General User Permissions
This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions
This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next **Cancel**

Step 2. Choose security level Step 2 of 3

Select security settings:

Grant access to admins only Users with your profile get full access (best for limited deployments)

Grant access to all users All internal custom profiles get full access

Select security settings User access set by profile (recommended for most packages)

[Previous](#) [Next](#) [Cancel](#)

Step 3. Install Package Step 3 of 3

The package is ready to be installed. Click Install to continue.

Ignore Apex test failures that may cause the installed application not to function properly.

[Previous](#) [Install](#) [Cancel](#)

Install complete [Help for this Page](#)

The components contained in this package have been successfully installed.

The final steps in the install process are to:

1. Change the visibility settings for any installed documents, reports, dashboards, letterheads, email templates, and custom fields on standard objects. By default, these components are visible to all users.
2. Set the Running User for any installed dashboards or analytic snapshots; by default, it is set to you.
3. Specify the appropriate recipients for any installed workflow tasks.
4. Specify the appropriate assignees for any installed workflow alerts.
5. Specify the appropriate user for workflow field updates that modify the Owner field or user lookups; by default, it is set to you.
6. Create a schedule for any installed analytic snapshots.
7. Configure any additional settings for this package from the package detail page.


[View Package Contents](#)

Manage Licenses.

Before your users can view the Performance chart, you must add them to the active users list. Click “manage licenses” and then “add users”. You can access this screen at any time by going to Setup=>App Setup=>View Installed Packages and clicking “Manage Licenses” next to Performance.

Package Details
Performance (Managed) [Help for this Page](#)

[Back to List: Installed Package](#)

 If you selected to **Deploy Later** the installed package is not available for use. This package contains active licensing, therefore you must assign licenses to users before they can access the package. [Tell me more!](#)

Installed Package Detail		Uninstall	Manage Licenses	Show Dependencies
Package Name	Performance			Version Number 1.0
Language	English			First Installed Version Number 1.0
Version Name	August 2010			Package Type Managed
Namespace Prefix	performance			Allowed Licenses 25
Publisher	Hoopla Software			Used Licenses 0
Status	Trial			API Access Unrestricted [Enable Restrictions]
Expiration Date	8/27/2010			Modified By Michael Smalls, 7/29/2010 2:20 PM

Package Details Performance [Help for this Page](#)

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Package Name	Performance	Publisher	Hoopla Software
Status	Trial	Allowed Licenses	25
Expiration Date	8/27/2010	Used Licenses	0

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Licensed Users [Add Users](#)

Full Name	Role	Active	Profile
Data not available for this view.			

Add Users Performance [Help for this Page](#)

View: **All** [Create New View](#) [<Previous Page](#) | [Next Page>](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Available Users
[select shown](#) [deselect shown](#) [deselect all](#)

Action	Full Name ↑	Role	Active	Profile
<input type="checkbox"/>	Anderson, Rachel		✓	Standard User
<input type="checkbox"/>	Brown, Linda		✓	Standard User
<input type="checkbox"/>	Clark, Kim		✓	Standard User
<input type="checkbox"/>	Davis, James		✓	Standard User
<input type="checkbox"/>	Garcia, Carol		✓	Standard User
<input type="checkbox"/>	Harris, Donald		✓	Standard User
<input type="checkbox"/>	Jackson, Sharon		✓	Standard User
<input type="checkbox"/>	Johnson, Michael		✓	System Administrator
<input type="checkbox"/>	Jones, Robert		✓	Standard User
<input type="checkbox"/>	Lewis, Susan		✓	Standard User

Show me fewer ▲ / ▼ more records per list page

Final Steps & Considerations

Hoopla Performance relies on many of your Salesforce CRM settings to display the correct information. Here are the settings to be aware of:

Manager Field

Closed sales and projections automatically roll up based on the manager field for each user. To update this field go to **Settings=>Administration Setup=>Manage Users=>Users** and then select the user.

Note for Professional & Group Edition Users: There is no manager field in the users settings, however the manager can also be set through the Chatter profile page by editing Contact information. If this field is left blank, only the user will be able to view their sales projections.

Home Performance Leads



Update Photo | Delete

Contact 

Edit Contact Information ✕

First Name

Last Name

Title

Manager

Email

Work Phone

Mobile Phone

Fax

Street Address

Quotas

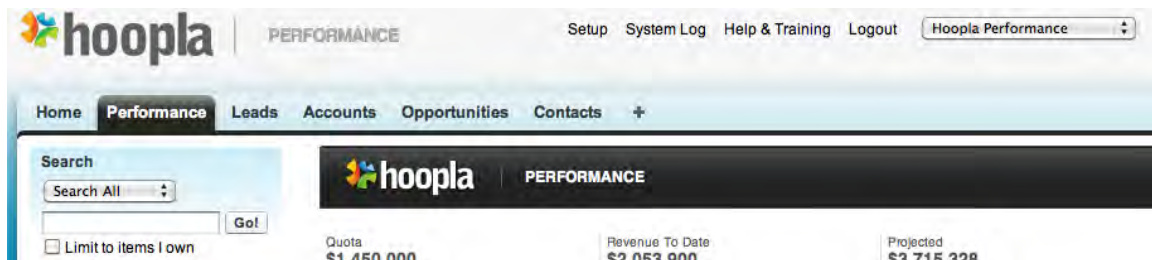
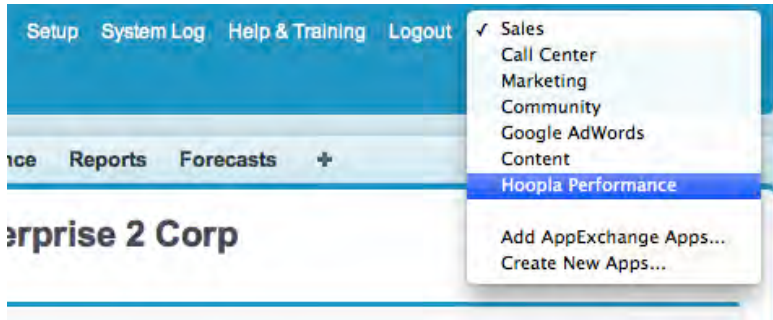
If quotas are enabled for your organization, Hoopla Performance automatically displays the quota for the period, calculates the percentage attained, and draws a quota line on the graph. If quotas are not leveraged, it will simply leave these areas blank.

Sales Periods

If you have defined sales periods (months or quarters), Hoopla Performance will automatically leverage those settings in displaying periods. If no periods are defined, Hoopla Performance defaults to a monthly view. All fiscal year settings are supported.

Viewing the Performance Tab

All users that have been added to the active list will be able to select the Hoopla Performance application from the standard drop-down window. The tabs in this app include: Performance, Leads, Accounts, Opportunities, & Contacts.



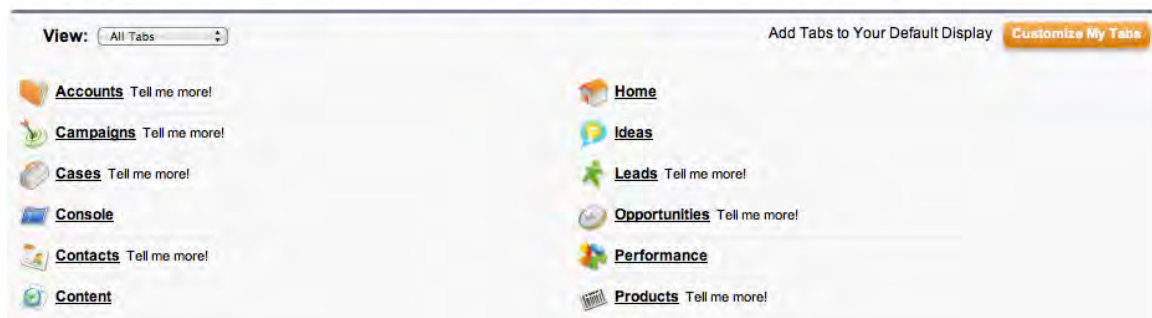
Customize Tabs

Additionally, your users can simply select the Performance tab from the “All Tabs” list (“+” sign) or add it permanently through the “Customize My Tabs” option.

All Tabs

[Help for this Page](#)

Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) to your display to better suit the way you work.



Hoopla Performance Chart

Navigating up and down the hierarchy, changing periods, and drilling down to opportunities for editing can be accomplished with a few mouse clicks. Below is a guide to the controls and navigation.

Annotations:

- Quota display: Quota \$350,000
- Revenue To Date: \$263,773 (75.4% of Quota)
- Projected: \$441,906 (126.3% of Quota)
- Breadcrumbs allow navigation back up the hierarchy: Diane Johnson > John Smith > Sam Peterson > Ed Martinez
- Closed Opportunities: Area before 'Today'
- Projected Opportunities: Area after 'Today'
- Go back 1 period: Left arrow
- Go forward 1 period: Right arrow
- Clicking anywhere here instantly navigates to the opportunity: Points to the 'Projected Opportunities' table

Name	Stage	Weighted Amount	Total Amount
Majestic 111k	Value Proposition	\$55,600	
Musicnotes 83k	Value Proposition	\$41,726	
Majestic 65k	Perception Analysis	\$46,052	
SolidSignal 49k	Perception Analysis	\$34,755	

Name	Amount
PWC 88k	\$89,100
Sears 88k	\$88,950

Managers and Executives will see their team summary below the chart and can click on a name to drill down and view their opportunities or their team if they are a manager

Name	Weighted Amount	Total Amount
Ken Thompson	\$707,430	
Ed Martinez	\$178,133	
Paul Moore	\$37,000	
Chris Thomas	\$10,000	
Sam Peterson	\$0	

Name	Amount
------	--------

Frequently Asked Questions

How are the projections calculated?

Projections are taken directly from the opportunity probability field and then multiplied by the amount field. To change the projections weight on any opportunity, modify the probability field.

Why aren't the opportunities and projections rolling up to the manager level?

Check to ensure that the manager field in all of the user profiles contain the name of the person they report to. This can be found in the "Manage Users" area and/or on the Chatter profile page for each user.

Why aren't quotas displaying?

You must have quotas turned on through the forecast capabilities in Salesforce in order for the quota information to be available to Hoopla Performance. You can read more about entering quotas in the online help under "Adding and Editing Quotas". Quotas are not supported in Team Edition.

Do quotas also roll up to the manager level?

No, quotas do not roll up the hierarchy. You must enter a quota for each manager that takes into account the quotas of the users under them.

How do I change the viewing mode from months to quarters?

Periods are also defined in the forecasting settings. Hoopla Performance defaults to month view unless you have changed the Forecast Period to "Forecast Quarterly".

For additional support or to submit ideas and suggestions, check out our support site at <http://getsatisfaction.com/hoopla> or send an email to support@hoopla.net. You can also call us at 888-748-1960.



Hoopla Software was founded to create tools and applications that improve the effectiveness of sales teams. Hoopla Countdown is designed to create the proper sense of urgency within the entire sales organization and Hoopla Performance makes sales projections much clearer and easier to manage. Watch for other useful applications coming soon from Hoopla Software.

