

Max's Distinctive, Impressive BizTech Student Blog

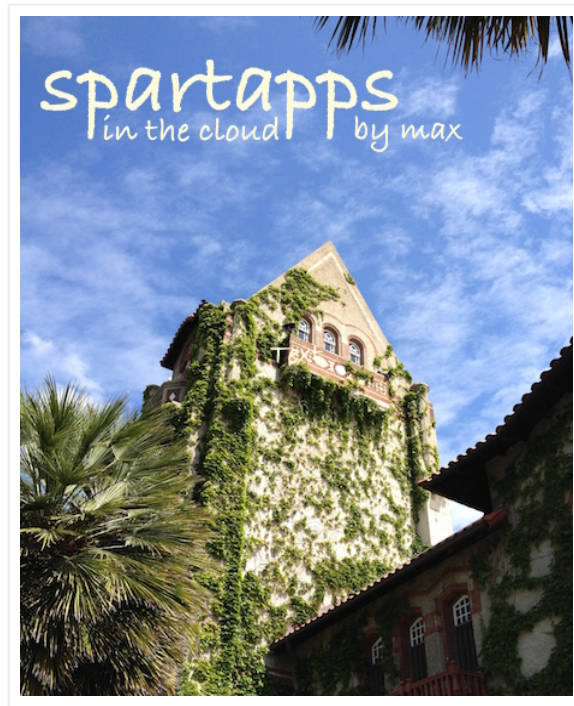
Sunday, September 25, 2016

DataMatic: It Slices, It Dices, Visualizes & Analyzes

Ok, so what IS a database, really? Despite being a vegetarian (mostly), I'm getting it this way—a database is to data as KFC is to chicken. It slices, it dices, things whirl around and bing...out comes just the parts you want, done to perfection. Some people want certain parts, done a certain way. Others want different parts, done another way. Databases are no different, really, except you don't need a wet-nap afterwards (one hopes).

This is good because Riley raved on my app (yesssssssss! crowd goes wild, \$200 added to checking, yay). But when she explained more about everything she has to deal with to make this VC/angel stuff work, it got me thinking. The more I thought, the more sure I got—I could get the app to be way more helpful to what she's trying to do if I could just figure out how to add some data slicing & dicing. I brain-dumped with her at Starbucks the next day, sketching my ideas on a napkin in the classic Silicon Valley style, and then the quest for Version 2.0 (and \$300 this time!) was on.

BTW—Here's the splash screen I put together for my little app-making service, working with the SJSU Spartan theme.



Totally optional, of course, but if you're highly motivated, you can try to figure out how to embed my pic (or your own) so it flashes for a sec every time when you first open your mobile app. Hint: Start with **Mobile Administration** (under **Administer**, at the top, on the lefthand side menu).

So, my fan-people, after talking with Riley, I cooked up a new, improved version of my app!

From what she told me, I realized she needed a new field, **Closability**, a percentage (0-100%). For each pitch, **Closability** tells how likely it is that she will close the deal with that VC or angel. Like if there's a VC company she's pretty sure will sign the contract, then she might set the **Closability** for that pitch to like 90%. Or if one of the angels is a long shot, she might set the **Closability** for that pitch to only 5% (1 in 20). For every pitch, it's just an estimate, for sure, based on her intuition from dealing with that firm but it helps her track what to do. You'll see.

So, to save you time (& steps), I made what SF calls a “package” containing my new **Pitch** structure (with **Closability** added) along with some other stuff I added for later on. Packages are how you give somebody whatever objects, layouts, apps, programming code, etc that you want to share—you save it all in a package and SF puts it on their cloud servers at a link you give out for people to install your package of stuff into their own SF account.

Now, if you're thinking what I was thinking, you're right—you don't have to share packages for free. Packages are how you can sell the apps & such you've created to others who want to use them!

When you install a package, it creates the structures that were put into it—in this case, it creates the new **Pitch** object and the associated tab, layouts, apps, code, etc. but NOT the data. You have to export/import that separately, but it's easy. I'll show you in a sec. But before we do that, I'll show you how to get rid of your **Pitch** object (and data). Don't worry—I made up 10 records you'll be able to download and import in a flash. (They're not Riley's real data, of course.) Start by deleting your **Pitch** object:

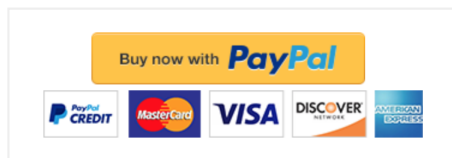
1. Go to **Setup > Build > Create > Objects > Pitch**
2. Click the **Delete** button in the center
3. In the popup window that appears, confirm you want to delete by checking the box that says “**Yes, I want to delete the custom object.**”
4. Then click the **Delete** button at the bottom of the popup window (you might have to scroll down to find it)
5. A few seconds later you should see **Deleted Objects (1)**, confirming you deleted it. (Note you can click there to undelete for up to 15 days after deleting!)

Ok so here's the part where I'm trying to “monetize my IP” (my blog) by getting my readers to chip in-a paltry one-time gratuity of \$19.99! Riley says this is how blog writers cuts back work hours so they can keep writing instead. We shall see, but for now:

6. To get the Pitch package that you need (and to see a selfie with my bff, Rocky) just click this link or type it into your browser:

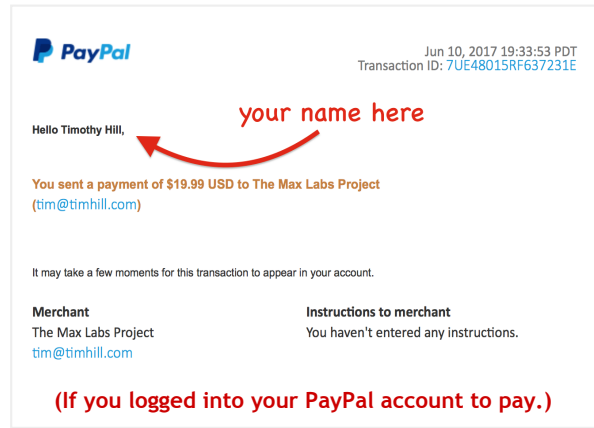
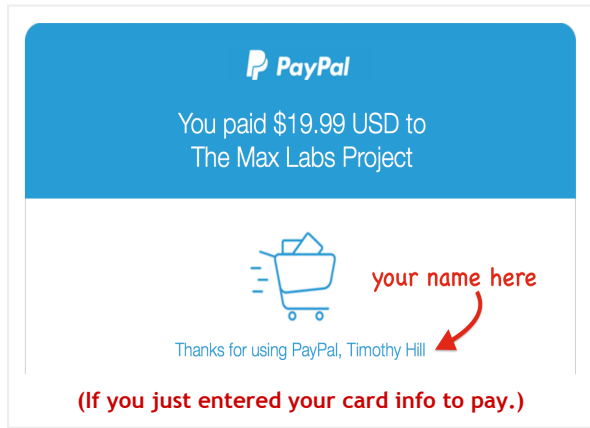
<http://tiny.cc/maxnrocky>

7. Now, on the “Max's Pitch Package Shop” page, click the **Buy now with PayPal** button (any credit or debit card works)



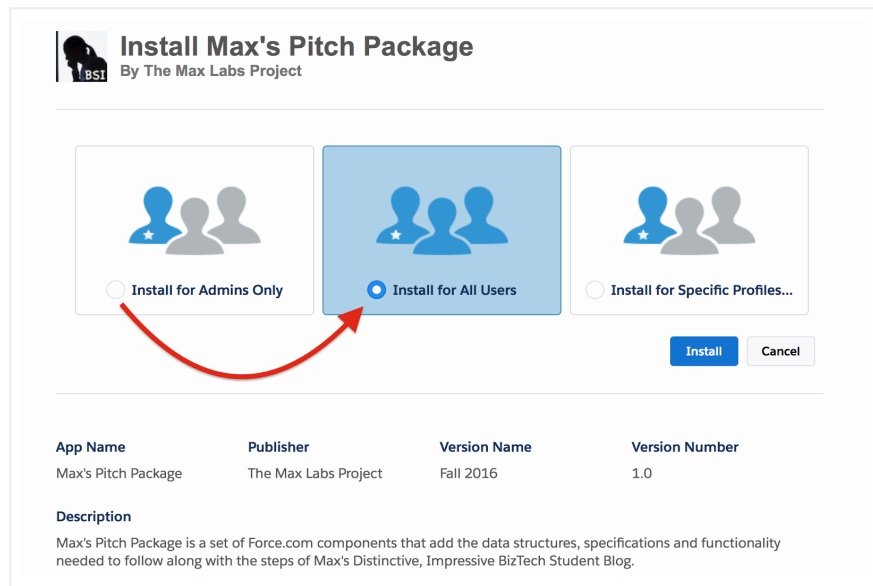
8. Add your deets & finish off the buy by clicking **Pay Now**

9. Check your email & find a PayPal receipt-the top should like one of these below (but with your name, of course)



10. Now, back on the "Max's Pitch Package Shop" PayPal confirmation web page, follow the steps it shows by entering the email address you used when you got your SF account (the one SF emailed your account verification to), etc & then on the Thank You page, click Install

Now back in SF, you should see an Install Max's Pitch Package page appear:



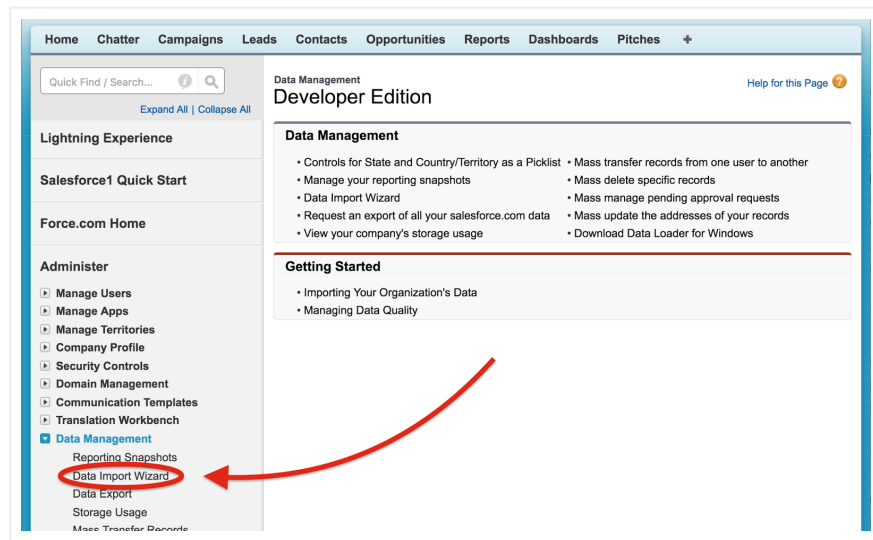
11. Click the **Install for All Users** panel in the middle
12. Click the blue **Install** button at the right
13. It'll say "installing and granting access to all users" for a bit & then **Installation Complete!**
14. Just click **Done** underneath that, on the right, & you'll see the one new package on the list

Now you should have the new, improved **Pitch** object all set up, including the new **Closability** field. All you need to do is get some data. I made some up and used Excel to put it into a plain text file (.csv) which is a format SF likes for importing. Prof gave me some space on his Google Drive to upload the file so you guys could download it & try this out.

15. Just open a new tab with the link below and Google Drive should open a preview of the file and just use the down arrow on the menu bar at the top of the page to download the file to somewhere on your computer (eg. your desktop) where you can find it later in **Step 21**

<http://tiny.cc/MaxsPitchData>

16. Then, close the download tab and, back in SF, go to **Administer > Data Management > Data Import Wizard**



17. Scroll down and find the big green-ish **Launch Wizard** buttons and click it
18. Under “What kind of data are you importing?” click the **Custom Objects** tab. That should show up **Pitches** below
19. Click on **Pitches**. That will fill in the middle box labelled **What do you want to do?**
20. In that middle box, click on **Add new records**
21. Then in the right hand column of the page, you’ll see where you can drag that .csv file you just downloaded onto the panel labeled **Drag CSV file here to upload**. SF will fill in the **File**, **Character Code** and **Values Separated By** fields automatically-just leave them as is.

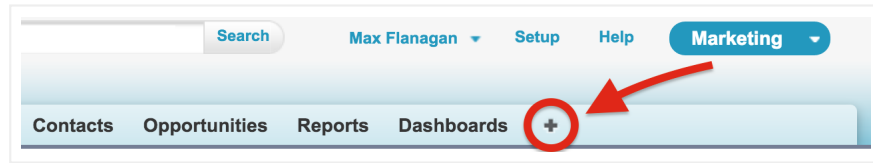
Or click **CSV** just below, with the little page icon by it. That should open a panel below and then under **File**, click on **Choose File** which should bring up a popup window for you to choose a file from your computer’s hard drive. Just navigate to the .csv file you just downloaded and double-click it or single-click to select it and then click **Choose**.

*(Windows users note: If you can’t find the file, it might be because your file search is set to show Excel files only, so you might need to change that setting to **All Files** to be able to find the .csv file you just downloaded.)*

22. Once you have the file selected properly, the green **Next** button that was dimmed until now should be bright, inviting you to click it, so go ahead and click **Next**
23. The next page that appears, **Edit Field Mapping: Pitches**, should show a perfect match between the SF **Pitch** object’s field names and the column headers in the .csv file and it even shows you samples of the data that will be going in
24. Click the green **Next** button
25. The next page that appears should say you have 12 mapped fields and then you can just click the green **Start Import** button
26. A popup window should appear with **Congratulations** (a little weird) and you can just click **OK**
27. You’ll get an email saying your **Pitches** import is complete
28. Then you should just be back in your normal SF environment with a page of stats you can ignore about the import

Now you've got all the data but how can you see it? When you deleted the **Pitch** object, it trashed your **Pitches** tab. When you installed the package, it recreated the **Pitch** object AND the tab, but you need to add the tab back onto the tab bar at the top in order to see it. Here's how:

29. Click on the plus sign at the end of the tab bar



30. That'll show you all your existing tabs and you can just click the orange button that says **Customize My Tabs** on the upper right

31. Find **Pitches** in the list under **Available Tabs** on the left and select it

32. Then, click the **Add** button in the center to move **Pitches** over to the **Selected Tabs** list

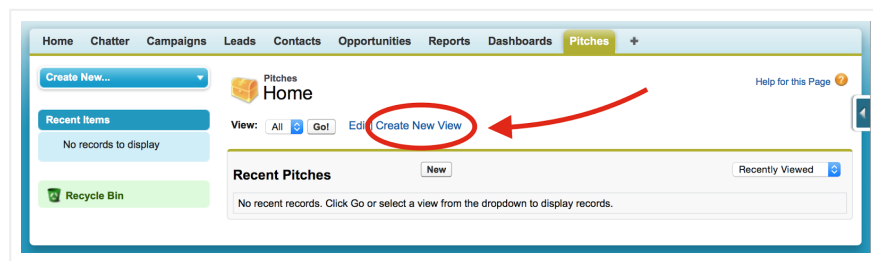
33. Just click **Save** and your new **Pitches** tab should show up now

Now click on your **Pitches** tab to see the new data. Yikes! Where is it?! (Sorry I couldn't help it.)

No, you won't see anything just yet, even though the data really is there. Why? Well, when you go to the **Pitches** tab, by default, it only shows you records you recently touched. Last time, you had touched them all recently by creating them. This time, you imported mine and haven't touched them yet so this view shows nothing!

No worries. It's the perfect opportunity to show you how I learned to customize views, slicing & dicing the data so it's easier for Riley to get the stuff she needs out of it:

34. First click on **Create New View** near the center



35. For **View Name** enter "Pitch Everything"

36. Tab to get **View Unique Name** to autofill

37. Scroll down to **Step 3. Select Fields to Display**

38. Under **Available Fields**, click **Address** so that it's selected

39. Hold down the **Shift** key while you click on **Type** (lower down on the list) & that should highlight everything from **Address** all the way down to **Type**

40. Now click the **Add** button in the middle to move all twelve (12) fields over to the **Selected Fields** list

41. Now at the bottom, under **Step 4. Restrict Visibility**, select **Visible to all users (Includes partner and customer portal users)**

42. Click **Save**

Now you should see all ten (10) records you imported from my file with all the custom fields showing but you'll have to scroll sideways to see everything. See? I told you it was all in there.

And here's a nifty feature:

- 43. Click on the column header for the **Business Name** field (near the left, by **Address**)

Notice that all the records (rows) automatically reordered themselves alphabetically by **Business Name**!

- 44. Now do the same thing to the **Closability** field by clicking on that header.

Notice the records are now sorted by **Closability** from lowest to highest.

- 45. Click on the **Closability** header again to see it reorder from highest down to lowest.

See how this gives Riley a lot of power to browse her data? But wait, there's more!

- 46. Click on **Create New View** again
- 47. For **View Name** enter "Angels Only" & tab to let **View Unique Name** autofill below
- 48. Scroll down if you need to to find **Step 2. Specify Filter Criteria**
- 49. Under **Filter By Additional Fields (Optional):**, below the **Field** column, click **--None--** to open the pull-down menu of fields to choose from
- 50. Click on **Type**
- 51. The menu immediately to the right, under **Operator**, will automatically switch to **equals**
- 52. Next find and click the little magnifying glass icon immediately to the right of the **Value** column slot next to the **equals** operator

- 53. That should open a popup window containing the two possible values of **Type** to choose from
- 54. Click the checkbox for **Angel** and then click **Insert Selected**. That should make the popup disappear and place "Angel" into the **Value** slot next to **equals** back on the form
- 55. Below, under **Step 3. Select Fields to Display**, move these fields, one at a time, over to the **Selected Fields** list: **Business Name**, **Investment Amount**, **Equity Percentage**, **Closability** and **Comments**, in that order. (If you already did it in a different order, it's ok—you can select any one of them in the **Selected Fields** list and use the **Top**, **Bottom**, **Up** and **Down** buttons immediately to the right to move them into the right order)

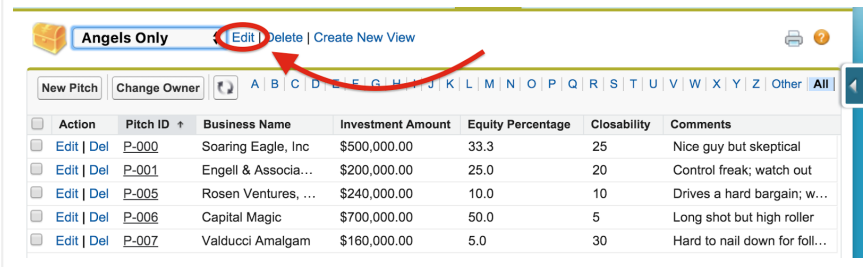
56. Like before, under **Step 4. Restrict Visibility**, select **Visible to all users (Includes partner and customer portal users)**

57. Click **Save**

See the new listing? Cool slicing, eh? Now for some dicing.

58. Notice the menu of available views up above the list, showing **Angels Only** as the current view. You can pull this down to select a different view at any time

59. For now, stay on **Angels Only** but click on **Edit**, immediately to the right



Action	Pitch ID ↑	Business Name	Investment Amount	Equity Percentage	Closability	Comments
Edit Del	P-000	Soaring Eagle, Inc	\$500,000.00	33.3	25	Nice guy but skeptical
Edit Del	P-001	Engell & Associa...	\$200,000.00	25.0	20	Control freak; watch out
Edit Del	P-005	Rosen Ventures, ...	\$240,000.00	10.0	10	Drives a hard bargain; w...
Edit Del	P-006	Capital Magic	\$700,000.00	50.0	5	Long shot but high roller
Edit Del	P-007	Valducci Amalgam	\$160,000.00	5.0	30	Hard to nail down for foll...

60. Now clear out “Angels_Only” from **View Unique Name** so it’s empty & then clear **View Name** too & type in “Loaded & Likely Angels Only” & tab to fill in **View Unique Name**


61. Scroll down to where you had already set the filter to **Type equals Angel**

62. In the 2nd filter row, set the **Field** menu to **Investment Amount**, set the **Operator** to **greater than** and enter “200000” (5 zeroes, no commas) into the **Value** slot

63. In the 3rd filter row, set the **Field** to **Closability**, set the **Operator** to **greater or equal** and enter “10” into the **Value** slot (be sure you pick the one with “equal” too, not just >)

64. Scroll down and click **Save**

Now, you’re seeing only those five custom fields for the just the two (2) pitches where it’s angels talking about more than \$200,000 AND there’s at least a 10% chance of closing the deal.



Action	Pitch ID ↑	Business Name	Investment Amount	Equity Percentage	Closability	Comments
Edit Del	P-000	Soaring Eagle, Inc	\$500,000.00	33.3	25	Nice guy but skeptical
Edit Del	P-005	Rosen Ventures, ...	\$240,000.00	10.0	10	Drives a hard bargain; wat...

This is how I set up a bunch of views for certain slices & dices that Riley wants to see all the time. She just logs in, hits the **Pitches** tab and then picks whatever views she wants to see. And all the views are always automatically updated—whenever new **Pitch** records are added, they automatically show up in whatever views Riley’s viewing (assuming they pass through the filters).

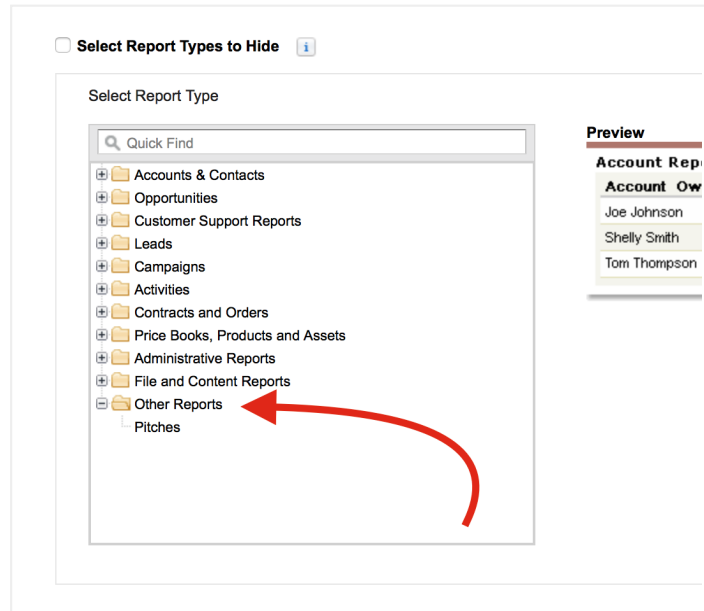
Riley’s super busy so she loves this b/c it helps her see how to target certain types of investors and avoid wasting time with others. She thinks I’m like some kind of elite techno-wizard! But check out the rest...

So how about seeing a couple of different slices at the same time, so you can compare them, etc?

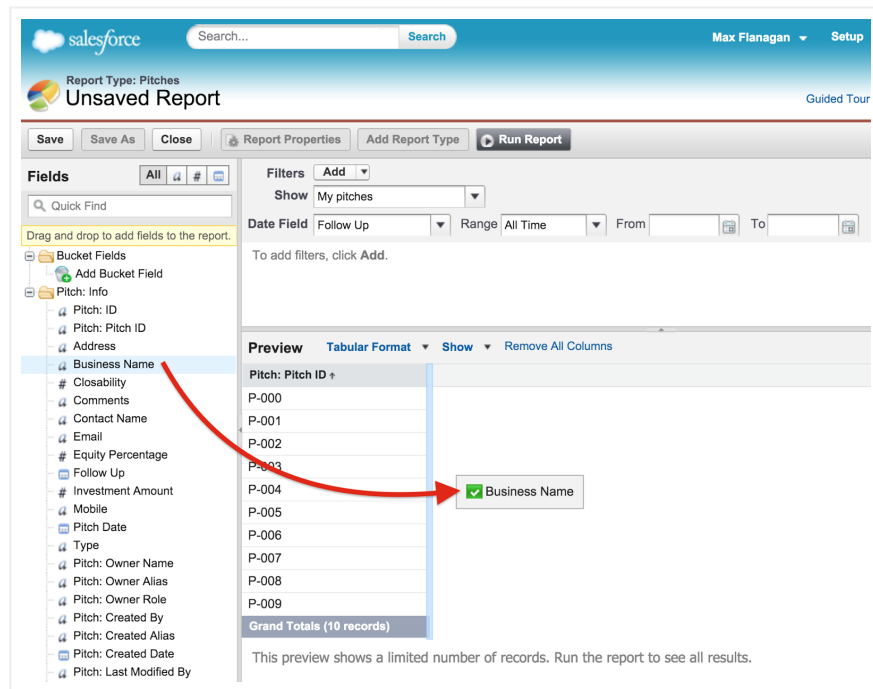
And how about getting stats on those slices, like average **Investment Amount** for VCs versus angels?

No problemo:

65. Click the **Reports** tab & if a yellow tour window pops up just click **No Thanks** to get rid of it
66. Click the **New Report** button and you'll get a page with a bunch of folders listed
67. Click on the plus sign (+) next to the **Other Reports** folder, at the bottom, to open it up and see **Pitches** listed

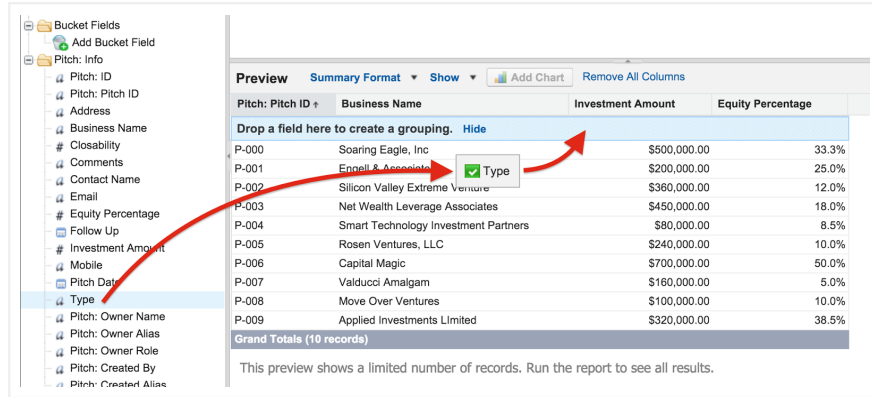


68. Click on **Pitches** then click the **Create** button at the bottom right corner
69. Kill the annoying yellow window again if it pops up and then you should see a report **Preview** pane in the center with a **Pitch ID** column already there and on the left, a column of **Pitch** fields with little icons to tell what type of data they hold, eg. text, numbers, dates, etc
70. Click on **Business Name**, in that lefthand column list and hold down on it to drag it over to the right of the **Pitch ID** column in the **Preview** pane:

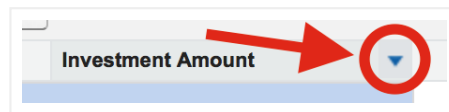


71. You'll see a narrow blue line appear—that's where the new column will appear in your report. Go ahead and drop it there to the right of **Pitch ID**. You'll see the **Business Names** fill in.

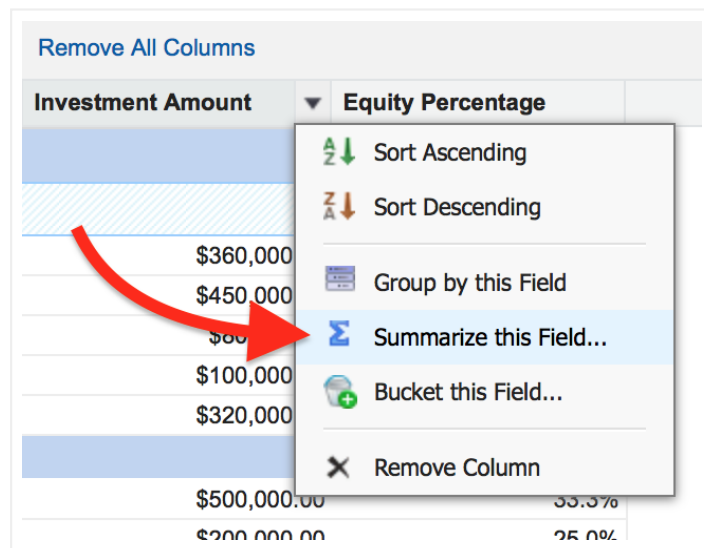
72. Now drag in **Investment Amount** and **Equity Percentage**, one at a time, in that order, further to the right side. (If you make a mistake you can just drag a column again to where you want it or drag it back off of the report into the list of fields again & start over!)
73. Now find the **Tabular Format** menu, just above **Business Name** in your **Preview** pane. Pull it down and select **Summary**
74. Next, drag **Type** and drop it on the blue bar, just below the column headers, where it says **Drop a field here to create a grouping.**



75. Now touch the **Investment Amount** header and you'll see a down-arrow appear, inviting you to pull down a menu



76. Click the arrow make the menu appear and then select **Summarize this Field**



77. In the **Summarize** popup window that appears, check the box under **Average** and click the **Apply** button
78. Now you'll see the average **Investment Amount** for **VCs** and for **Angels** and you'll notice that the **Angels** tend to be thinking in higher dollar terms than the **VCs** as a group
79. Repeat **Steps 75-77** but for **Equity Percentage** to get those averages too & then note that those greedy **Angels** want a lot more equity, as a group, than their **VC** counterparts, too. Makes sense, though—they're risking more up front, they expect bigger shares of the payoff later

80. Now find the **Save** button on the upper left and click it to save your report
81. In the **Save Report** popup, enter the **Report Name** as “Average Amount & Equity by Type”
82. Tab to autofill the **Report Unique Name**
83. Pull down the **Report Folder** menu and select **Unfiled Public Reports**
84. Click **Save and Run Report**

Pitch: Pitch ID	Business Name	Investment Amount	Equity Percentage
<input type="checkbox"/> Type: VC (5 records)			
		avg \$262,000.00	avg 17.4%
<u>P-002</u>	Silicon Valley Extreme Venture	\$360,000.00	12.0%
<u>P-003</u>	Net Wealth Leverage Associates	\$450,000.00	18.0%
<u>P-004</u>	Smart Technology Investment Partners	\$80,000.00	8.5%
<u>P-008</u>	Move Over Ventures	\$100,000.00	10.0%
<u>P-009</u>	Applied Investments Limited	\$320,000.00	38.5%
<input type="checkbox"/> Type: Angel (5 records)			
		avg \$360,000.00	avg 24.7%
<u>P-000</u>	Soaring Eagle, Inc	\$500,000.00	33.3%
<u>P-001</u>	Engell & Associates	\$200,000.00	25.0%
<u>P-005</u>	Rosen Ventures, LLC	\$240,000.00	10.0%
<u>P-006</u>	Capital Magic	\$700,000.00	50.0%
<u>P-007</u>	Valducci Amalgam	\$160,000.00	5.0%
Grand Totals (10 records)		avg \$311,000.00	avg 21.0%

2

Now you’ve got a nice drag & dropped report that actually shows something meaningful. At least Riley loved it because it helps her analyze what’s going on with her pitches. And here’s a another nifty feature:

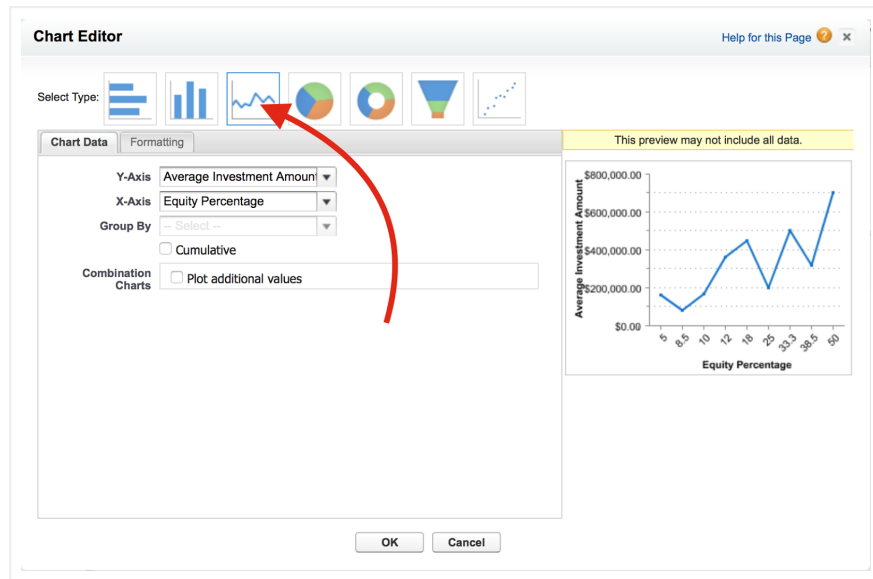
85. In the upper center, you’ll see a **Time Frame** box with **Date Field** already set to **Follow Up** and **Range** set to **Custom**
86. Click on the **From** box and set the date to 11/1/2016
87. Click on the **To** box and set the date to 11/30/2016
88. Click the **Run Report** button on the left, above the report

Now, only the records with **Follow Up** dates in November are included and you can see that the differences between the angel and VC groups is even more exaggerated for the pitches that she’s following up with in that month. Maybe interesting strategy implications for Riley? Don’t know—she’s the boss, but as least she can get the data, served to perfection, if/when she needs it.

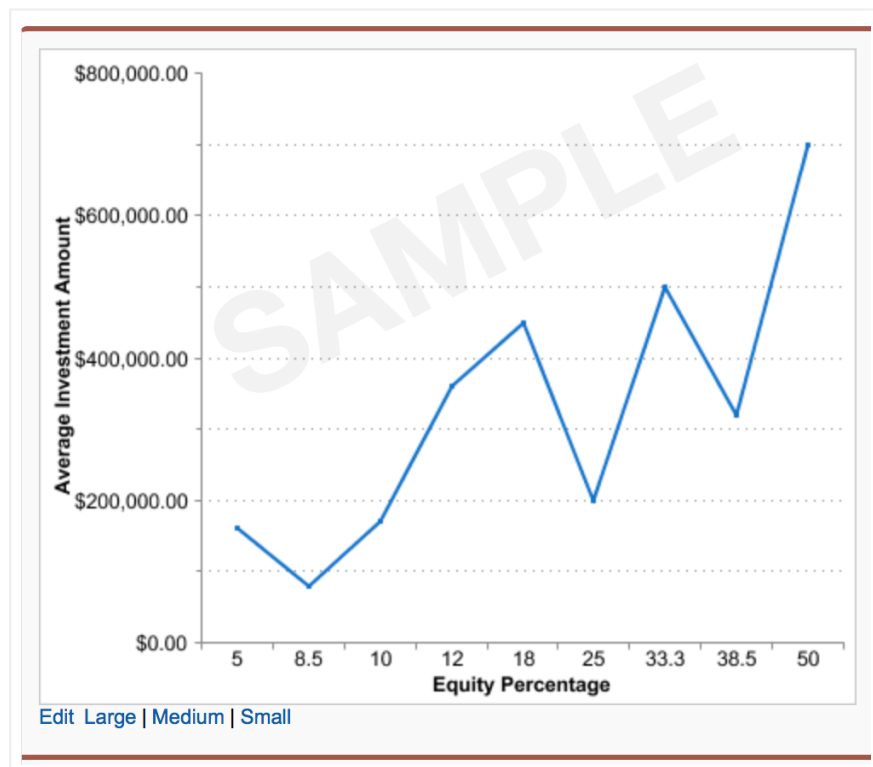
Visualizing data really helps sometimes and SF can help you do that too:

89. Click on your **Reports** tab and then **New Report** again, like before
90. Open the **Other Reports** folder again and click on **Pitches** and then the **Create** button on the bottom right, like before
91. Drag in **Investment Amount** and drop it next to **Pitch ID**
92. Touch the **Investment Amount** header see the down-arrow, like before, and drop down that menu & click **Summarize this Field** again
93. Check the box under **Average** and click **Apply**, just like before
94. Now, find the **Tabular Format** menu again, just above the **Investment Amount** header, pull it down and click on **Summary**
95. Now drag **Equity Percentage** from the lefthand column onto the blue bar at the top of the report that says **Drop a field here to create grouping**.

96. Now click the **Add Chart** button, just at the top of the **Preview** pane, near the center, and a **Chart Editor** popup window will appear
97. Near the top of the popup window, find the **Select Type** row with depictions of different types of charts and click on the third one, the **Line Chart**



98. Then click **OK** at the bottom of the popup window and you'll see your line chart, plotting **Average Investment Amount** against **Equity Percentage**
99. To save your chart/report, click **Save** on the upper left
100. Then in the popup window, enter "Equity vs Investment Chart" for the **Report Name**, tab to autofill the **Report Unique Name** and select **Unfiled Public Reports** for the **Report Folder**
101. Click **Save and Run Report**



Well, as Riley explained it, the “mountains” are good deals, relatively speaking. Those are the points where the pitched firms are offering higher levels of investment in return for lower levels of equity (ownership) they’re demanding. The “valleys” are bad deals, by comparison, because those firms tend to be demanding more ownership (equity) for the level of investment they’re offering her.

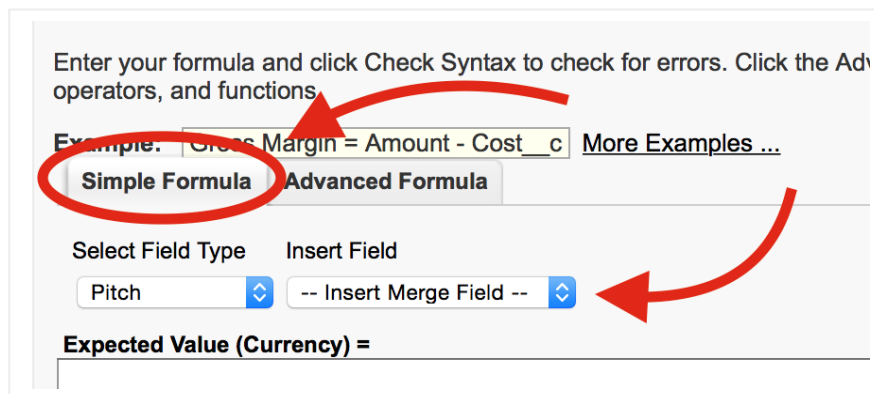
If you drew an imaginary line through the middle of the data, that was like the smooth version of the jagged line, then the deals above the line would be looking good and the ones below would be looking worse, by comparison.



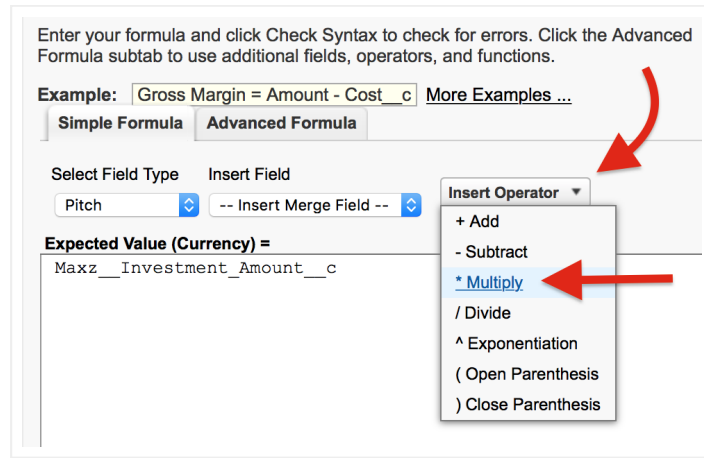
Whenever Riley’s pitching a new firm and negotiating a deal, she knows if they’re falling below that line, they’re greedy or she’s not negotiating hard enough, etc. Visualization rules!

One more nifty thing to go for now—talking to Riley I got this idea. She was talking about gauging her progress. It’s not easy b/c she hasn’t closed any deals yet so if you ask how much capital she’s raised the answer is zero. But she’s made a lot of pitches and each one has some chance that it will close and bring \$ in. That’s the closability factor. So really, to estimate how much she’s LIKELY to have raised, you multiply the amount of the deal times the probability it will close, the closability, right? So if there’s a 10% chance of a \$500,000 deal closing, then that’s $.10 \times \$500,000 = \$50,000$ of expected value in that pitch. Turns out you can add calculated fields like that to a record in SF:

102. Go to Setup > Build > Create > Objects > Pitch
103. Then, scroll back down to the Custom Fields and Relationships section and click New
104. This time, select Formula for the Data Type and click Next
105. For Field Label, enter “Expected Value” and tab to autofill Field Name
106. For Formula Return Type select Currency and click Next
107. Now on the Step 3. Enter formula page, be sure the Simple Formula tab is selected instead of the Advanced Formula tab and then find the -- Insert Merge Field -- menu



108. Click on the -- **Insert Merge Field** -- menu to open it up and then select **Investment Amount**
109. SF will insert the internal field name “**Investment_Amount__c**” into the formula definition box for you
110. Next click on the **Insert Operator** menu to open it up and then select * **Multiply**



111. SF will insert the multiplication operator into your formula definition box for you, after **Investment_Amount__c**
112. Click on the -- **Insert Merge Field** -- menu again to open it up and this time, select **Closability**
113. SF inserts the internal field name “**Closability__c**” into the formula definition box for you
114. Now just click **Next**, then **Next** again and then **Save**

Now, to see data in your new field:

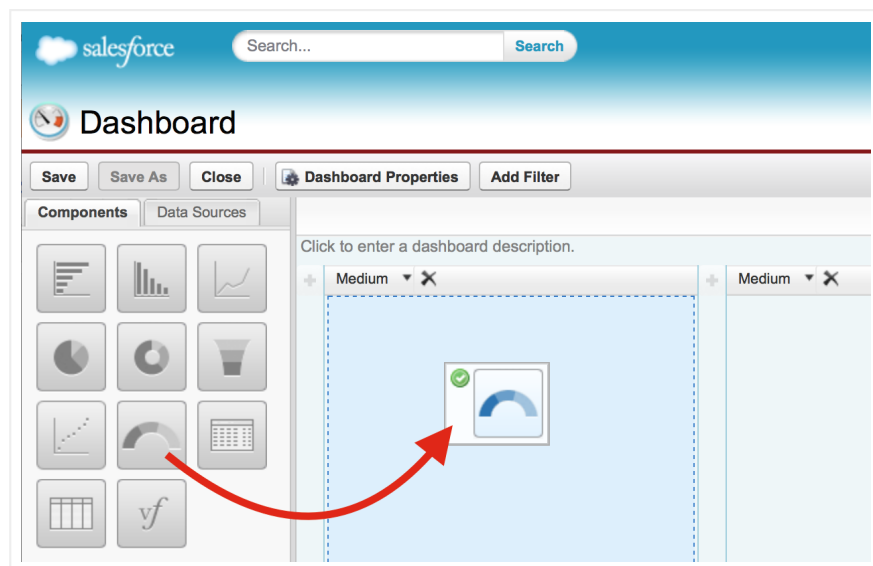
115. Click your **Pitches** tab
116. Click **Create New View**
117. For **View Name**, enter “**Deal numbers & expected values**”
118. Then tab to autofill **View Unique Name**
119. Scroll down and move **Business Name**, **Investment Amount**, **Equity Percentage**, **Closability** and **Expected Value** over from the **Available Fields** list to the **Selected Fields** list, by highlighting each and clicking the **Add** button, as before
120. Click on **Visible to all users (Includes partner and customer portal users)**
121. Click **Save**

Action	Pitch I...	Business Name	Investment Amount	Equity Percentage	Closability	Expected Value
Edit Del	P-000	Soaring Eagle, Inc	\$500,000.00	33.3	25	\$125,000.00
Edit Del	P-001	Engell & Associates	\$200,000.00	25.0	20	\$40,000.00
Edit Del	P-002	Silicon Valley Extre...	\$360,000.00	12.0	15	\$54,000.00
Edit Del	P-003	Net Wealth Leverag...	\$450,000.00	18.0	2	\$9,000.00
Edit Del	P-004	Smart Technology I...	\$80,000.00	8.5	40	\$32,000.00
Edit Del	P-005	Rosen Ventures, LLC	\$240,000.00	10.0	10	\$24,000.00
Edit Del	P-006	Capital Magic	\$700,000.00	50.0	5	\$35,000.00
Edit Del	P-007	Valducci Amalgam	\$160,000.00	5.0	30	\$48,000.00
Edit Del	P-008	Move Over Ventures	\$100,000.00	10.0	30	\$30,000.00
Edit Del	P-009	Applied Investment...	\$320,000.00	38.5	25	\$80,000.00

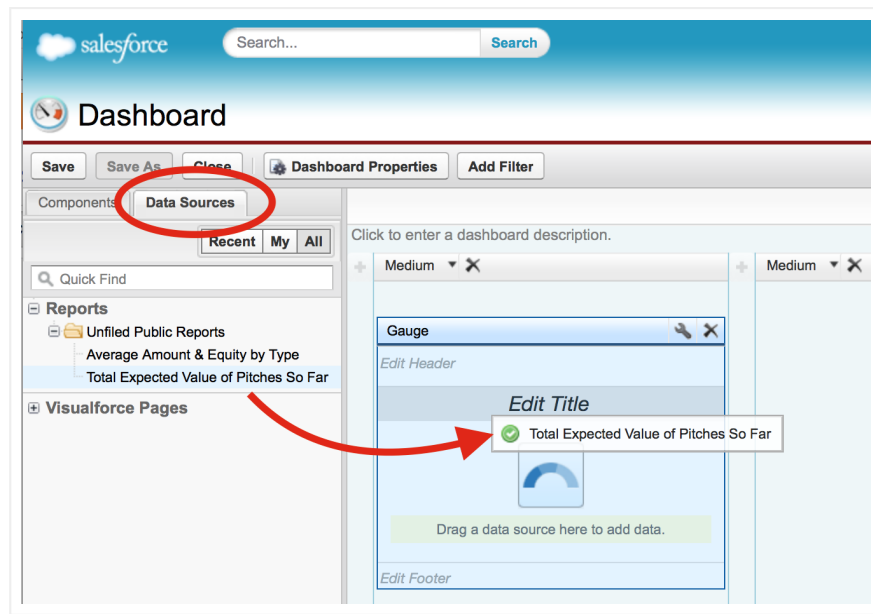
Now you can see all the records with the **Expected Values** appearing as if they were just part of the stored data but they're not. They're calculated when they're needed, like when you go to this view, so they're always up to date, even when someone changes the value of **Closability** or **Investment Amount** for a record. Nice, eh?

So how can Riley see at a glance how close she is to her goal of raising \$1.5M? Let's calculate & visualize it:

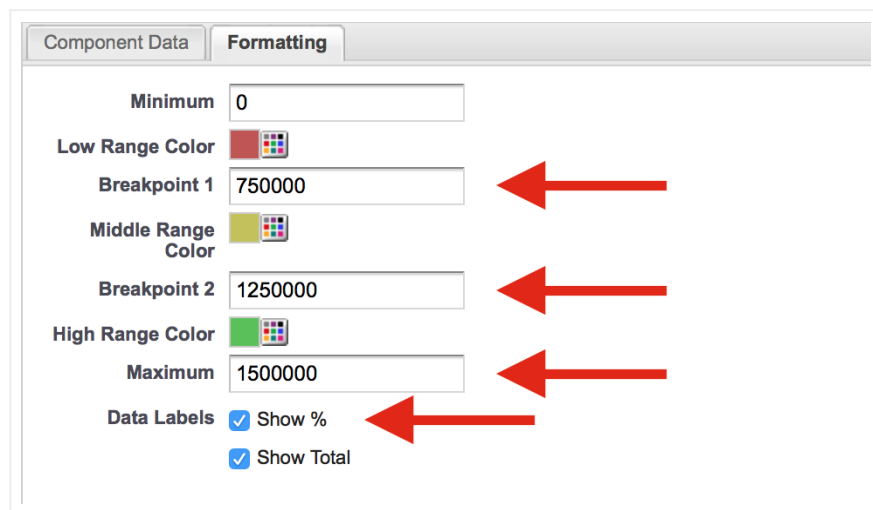
122. Click the **Reports** tab
123. Click **New Report**
124. Open the **Other Reports** folder
125. Click on **Pitches**
126. Click the **Create** button
127. Drag **Expected Value** onto the report **Preview** pane, to the right of **Pitch ID**
128. Touch the **Expected Value** header and click the little down arrow to open the menu
129. Select **Summarize this Field**
130. Check the box under **Sum** and click the **Apply** button
131. Click on the **Tabular Format** menu, just above the **Expected Value** header and select **Summary**
132. Drag **Pitch: Pitch ID (NOT Pitch: ID)** to the blue bar labelled **Drop a field here to create a grouping.**
133. Click **Save** at the upper left corner
134. For **Report Name** enter "Total Expected Value of Pitches So Far"
135. Tab to autofill **Report Unique Name**
136. Set **Report Folder** to **Unfiled Public Reports**
137. Click **Save**
138. Click **Run Report**
139. Now click the **Dashboards** tab
140. Click **New Dashboard**
141. Click-hold the gauge component on the left (the one that looks like a rainbow) and drag it onto the leftmost of the three columns in the middle of the page



142. Then click the **Data Sources** tab, just above the chart components icons
143. Click the plus sign (+) next to **Reports** to open that folder
144. Click the plus sign (+) next to **Unfiled Public Reports** to open that folder
145. Drag **Total Expected Value of Pitches So Far** to the gauge icon in the leftmost column of the middle area and drop it there



146. Click the little wrench icon above and to the right of the **Gauge** you created
147. For **Maximum**, enter 1500000 (b/c Riley has figured that anything between \$1,250,000 and \$1,500,000 is a go and anything beyond that is really overkill)
148. For **Breakpoint 2**, enter 1250000 (b/c Riley thinks launching with between \$750,000 and \$1,250,000 would make it doable, but not really enough to build the business efficiently)
149. For **Breakpoint 1**, enter 750000 (b/c if she doesn't raise at least that much, she'll bag it)



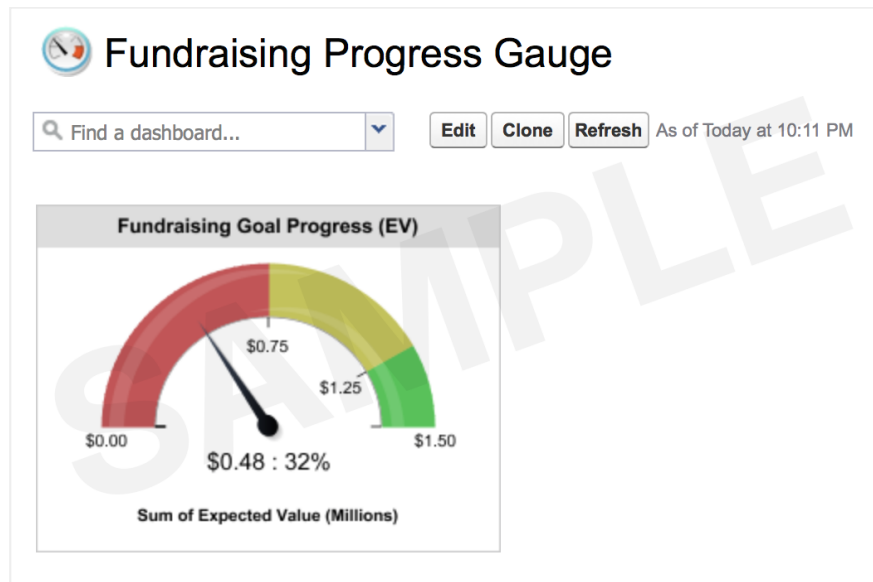
150. For **Data Labels**, just below **Maximum**, check the box for **Show %** and click **OK**
151. Click on **Edit Title**, just above your gauge
152. Enter "Fundraising Goal Progress (EV)"
153. Click **Save** near the upper left corner
154. For the dashboard **Title** enter "Fundraising Progress Gauge"

155. Tab to autofill **Dashboard Unique Name**

156. Leave the **Save** to set to **My Personal Dashboards** and click **Save**

157. Click **Close** near the upper left corner and then **Close** in the popup window

Now you see the what Riley sees when she clicks her **Dashboard** tab to check on how it's going.



4

Of course, I'm not showing you her real data but like this gauge, hers shows there's a lot of work yet to do to get the capital she needs. But at least she has the data and the tools to slice, dice, visualize & analyze now, so that's gotta help.

Oh, and I reached my fundraising goal of \$200 more income for Spartapps in the Cloud by Max. 100% growth rate. Yay! Just got to keep it up!

[Newer Post](#)

[Home](#)

[Older Post](#)