

Carousel™

## **CAROUSEL QUICK START GUIDE**

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Carousel Quick Start Guide

## ABOUT CAROUSEL

Carousel is a presentation and analytics tool for Salesforce.com that enables users to present key metrics and easily extract and join data out of Salesforce.com exactly the way they need it. By enabling users to build "decks" of enhanced active dashboards, Carousel enables anyone in Salesforce.com to focus on the big picture without taking the time to build or refresh a dashboard or report.

Carousel enables you to:

- Present live data that can be used to drive meetings right in the Salesforce.com interface
- Easily join data from related objects (both standard and custom) for powerful analytics and reporting
- Report on exceptions (e.g., Accounts without Opportunities)
- Display data and dashboards however you want: in a tab, S-control, button integration link, in a separate window, or in an email
- Write data directly back to the Salesforce.com database

Carousel makes presenting and reporting on any business activity easy.

### About this Quick Start Guide

This guide will take you through a series of common Carousel use cases. The guide covers examples involving some of the more popular Carousel components. The examples used are real use cases that our support staff frequently demonstrated to customers.

### Other Useful Resources

There are other help sources of you can explore in conjunction with this guide. These are listed in the table below:

Source	Description	URL
<b>Carousel User Guide</b>	This is a comprehensive and detailed guide to using Carousel. It describes many common examples of using Carousel. You should consult this guide after you have read the Carousel Quick Start Guide.	<a href="http://www.dreamfactory.com/carousel/user_guide_carousel.pdf">http://www.dreamfactory.com/carousel/user_guide_carousel.pdf</a>
<b>Carousel Component Reference Guide</b>	This guide describes all the Carousel Components in detail. It describes all the functions and available properties of each component.	<a href="http://www.dreamfactory.com/carousel/component_guide_carousel.pdf">http://www.dreamfactory.com/carousel/component_guide_carousel.pdf</a>
<b>Online Training Sessions</b>	We offer a series of Introductory Carousel Training Sessions with one of our DreamFactory Trainers.	<a href="http://www.dreamfactory.com/carousel/about_www.html">http://www.dreamfactory.com/carousel/about_www.html</a>


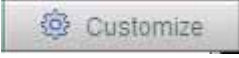



## NAVIGATING CAROUSEL

Carousel is easy to learn for users of all abilities. Carousel has a user-friendly, easily-navigable, and manageable User Interface (UI).

Every button and component on the User Interface comes with a helpful **ScreenTip**. Simply roll your mouse over the button or component and a ScreenTip appears telling you the function of the button or component.

There are three main views in Carousel.

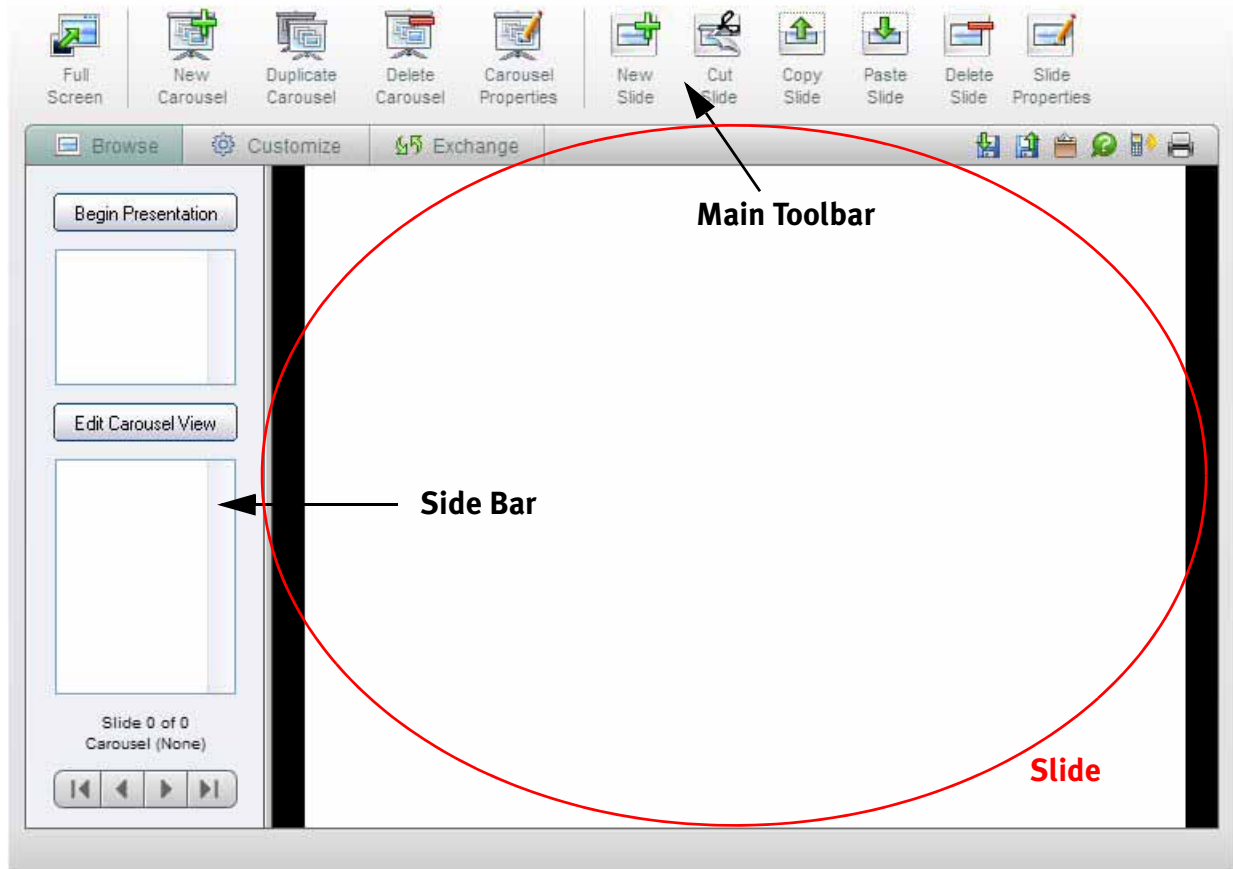
View	Use
	<p><b>Browse</b> view is the default view you see when you launch Carousel. In <b>Browse</b> view, you can navigate presentations, create a new presentation, configure presentation properties, add or delete slides from a presentation, etc. You cannot add and connect components in <b>Browse</b> view.</p> <p>You can manage which Carousel Presentations appear in your Carousel Display.</p> <p>You can launch an existing Carousel Presentation. Once you have created a new presentation or want to edit an existing presentation, you should move onto <b>Customize</b> view.</p>
	<p><b>Customize</b> view gives you the most control over your presentation. You can add and edit components on your slide; you can then link these components together to report and present live data in Salesforce.</p> <p>You can customize your entire Carousel Presentation from <b>Customize</b> view.</p>
	<p><b>Exchange</b> view allows you to import and export Carousel presentations as XML files and share presentation templates (not your data) with the Salesforce user community.</p>

Each view in Carousel follows the same easy navigable design. Each view can be broken down into three distinct areas:

- Main Toolbar
- Sidebar
- Slide

Each area is labelled in the graphic.

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Screen Area	Function
<b>Main Toolbar</b>	The buttons appearing on the <b>Main Toolbar</b> will differ depending on which view you are in. If you are in <b>Browse</b> view, you can add slides and presentations. If you are in <b>Customize</b> view you can add and delete components in individual slides. If you are in <b>Exchange</b> view you can import and export presentations and upload and download presentations from the Salesforce user community.
<b>Side Bar</b>	As with the Main Toolbar, the buttons and components appearing on the <b>Side Bar</b> will differ depending on the view you are in.
<b>Slide</b>	The <b>Slide</b> is a main view or workspace area, depending upon which view you are in.

## GETTING STARTED IN CAROUSEL

Let's begin by discussing the user example we are going to cover in this Guide.

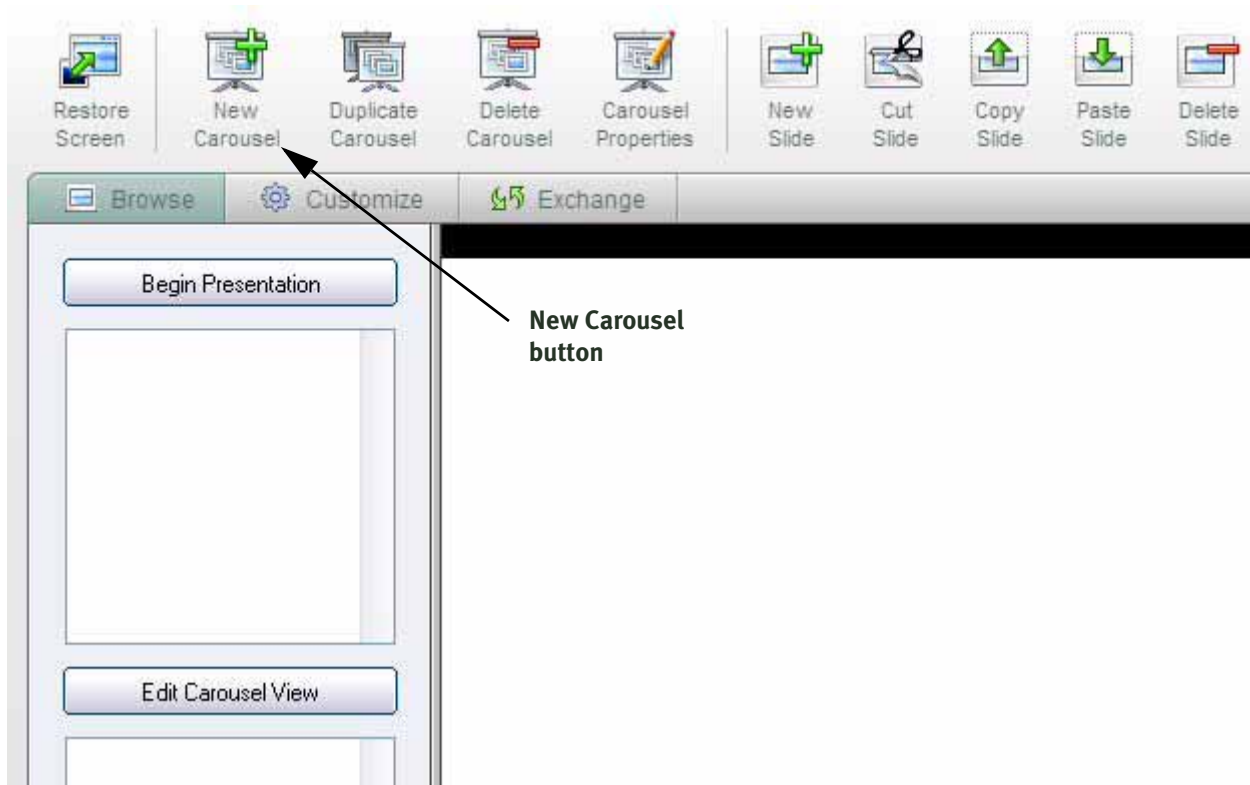
We are going to begin by creating a new Carousel presentation. Once we have created the Carousel and set its properties, we will customize the layout and add a series of components that are connected to live Salesforce data. Then we will explore various ways of formatting and presenting this data in a live presentation.

The main purpose of this example is to get you familiar with navigating the interface, show you how to create a live presentation from scratch, and introduce you to the concept of connecting components together to extract live information out of Salesforce.

### Creating a New Carousel

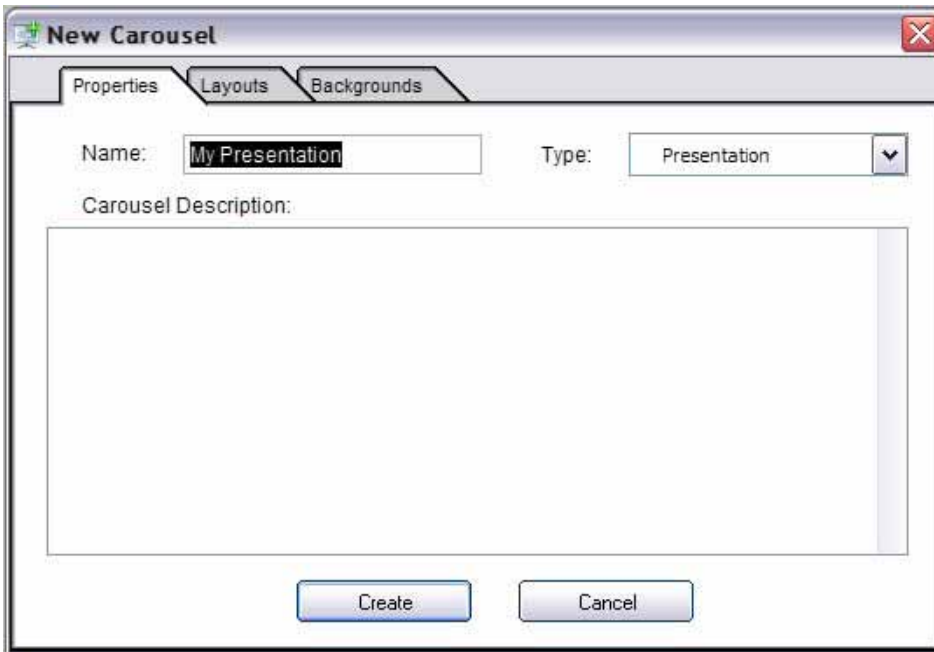
Let's begin by creating a new Carousel presentation. To create a new Carousel follow these steps:

1. Click on the **New Carousel** button at the top of the screen.



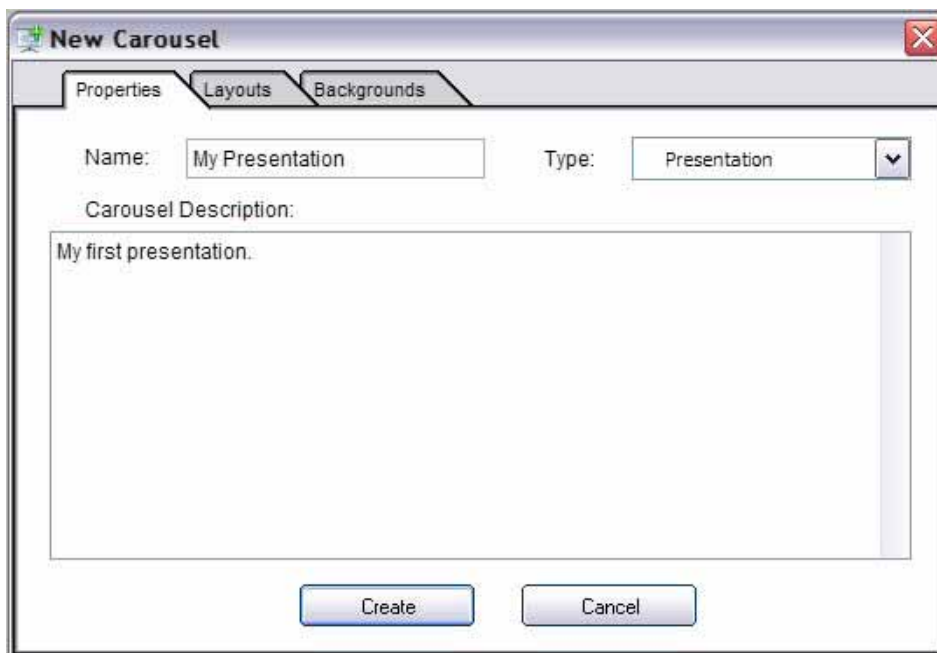
## Carousel Quick Start Guide

The Carousel Properties dialog box is displayed.



2. Define the properties of the new Carousel.

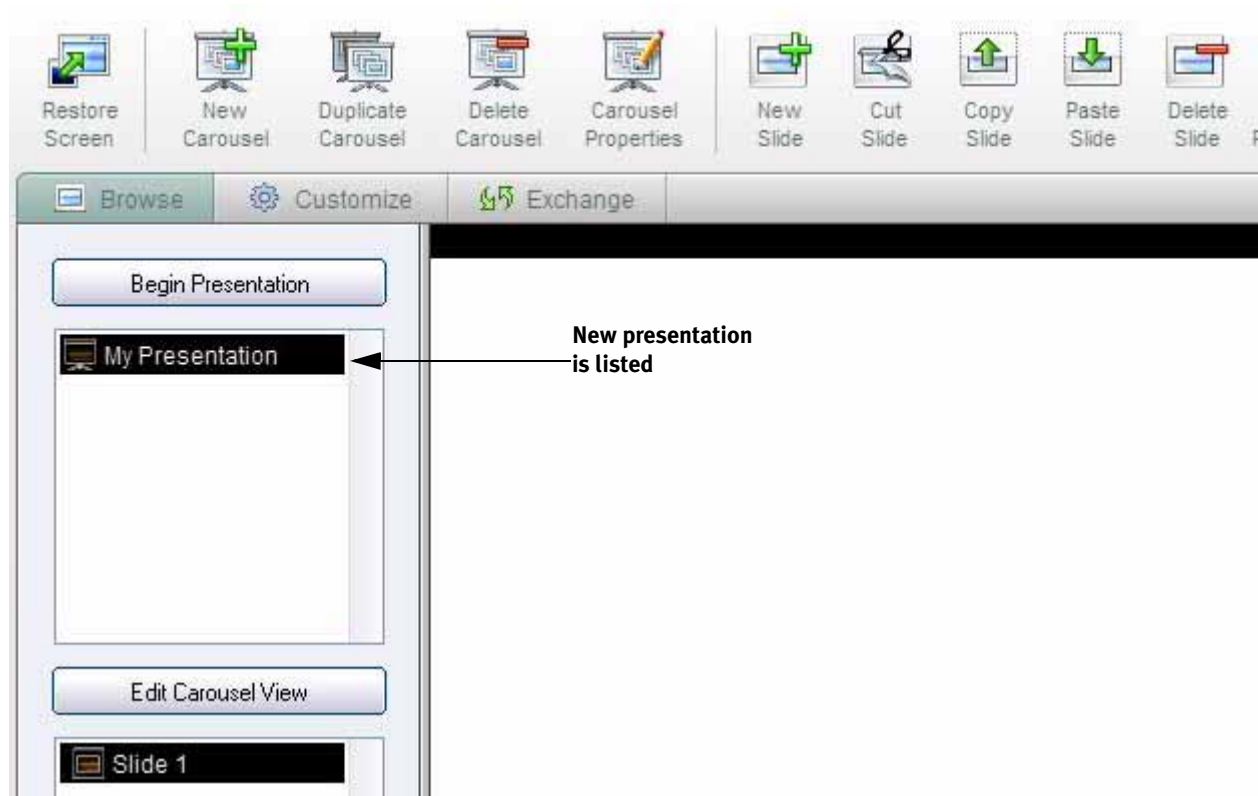
- In this example we will leave the **Name** as **My Presentation**.
- Optionally choose a Carousel type from the **Type** drop-down list. For this example choose "Presentation".
- Optionally type a description in the **Carousel Description** text box. For this example type "My first presentation".



**Note:** As well as choosing a **Carousel Type** from the drop-down list, your Salesforce Administrator can also configure the **Type** categories in **Salesforce**. All the types set in Salesforce will appear in this drop-down list.

3. Click **OK** to save the properties you defined.

Your new Carousel now appears in the Carousel list.

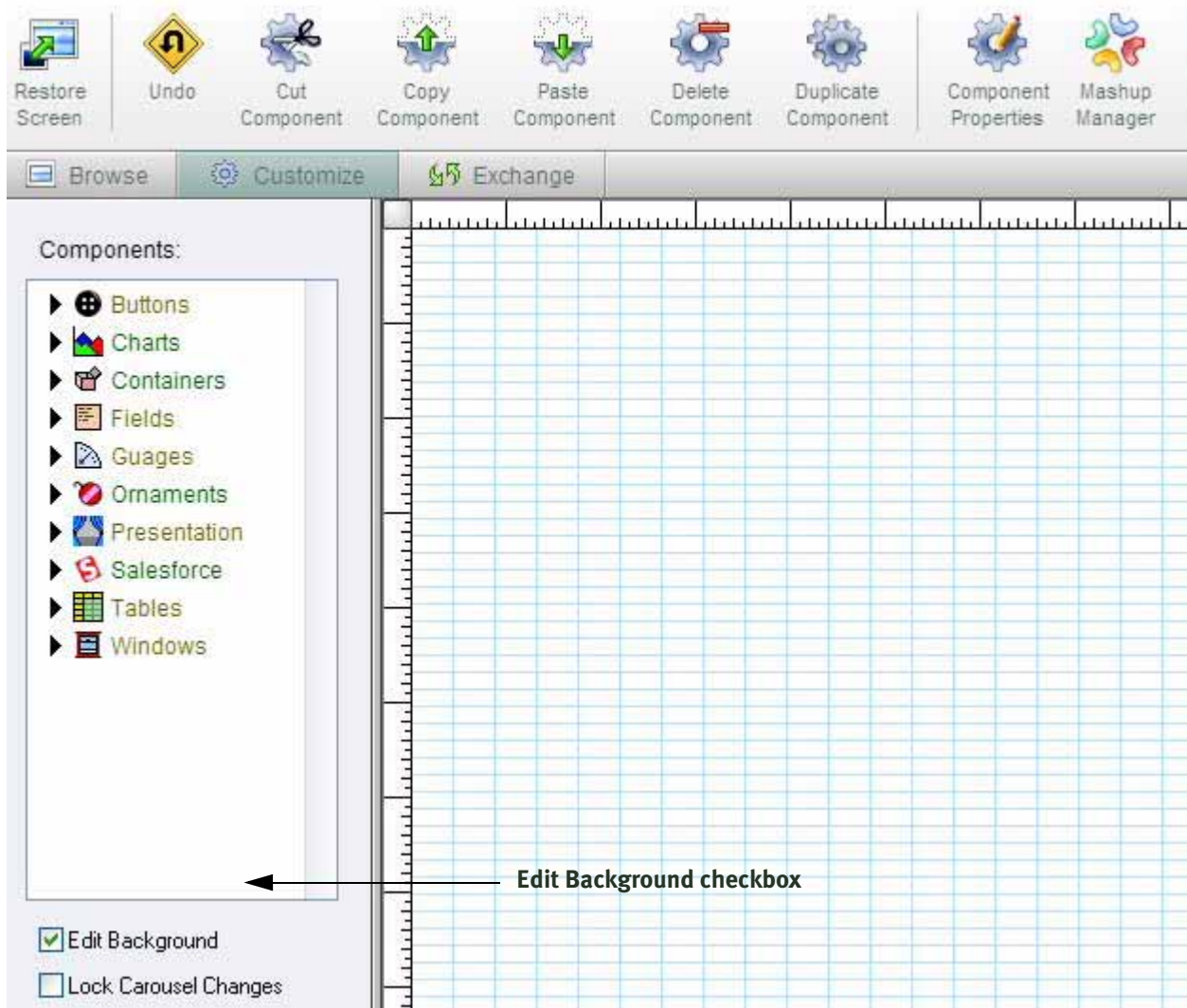


## Edit the Background of the Slide

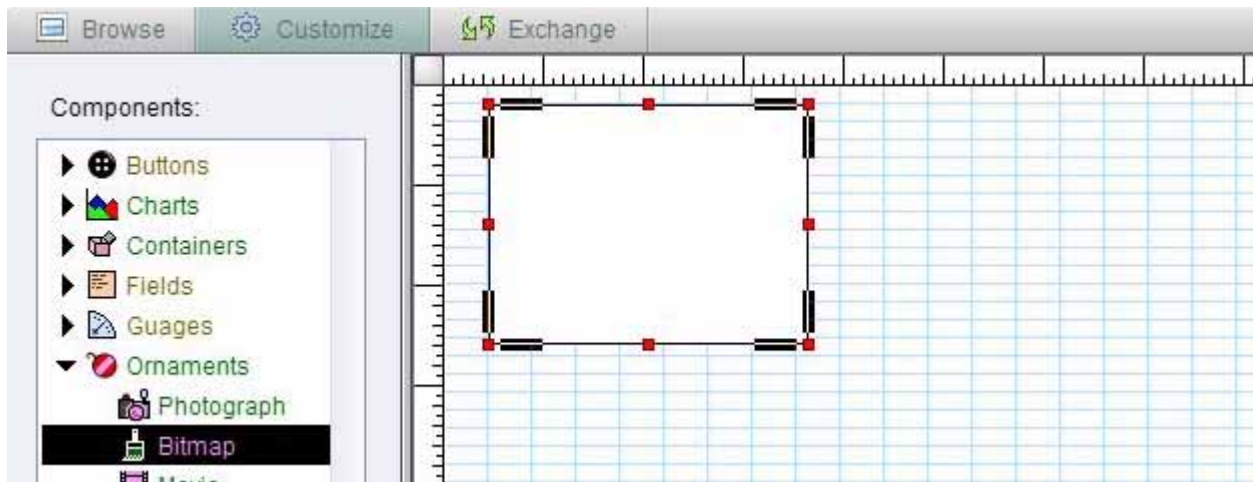
Now we have created our basic Carousel, we want to customize the first slide. Let's start by editing the background of the slide. It's very likely you will want to display your company logo on all of your slides. Anything you edit on the background of a slide will appear on every slide of the Carousel deck. Follow these steps to edit the background of the slide:

1. Go to **Customize** view and select the **Edit Background** checkbox.

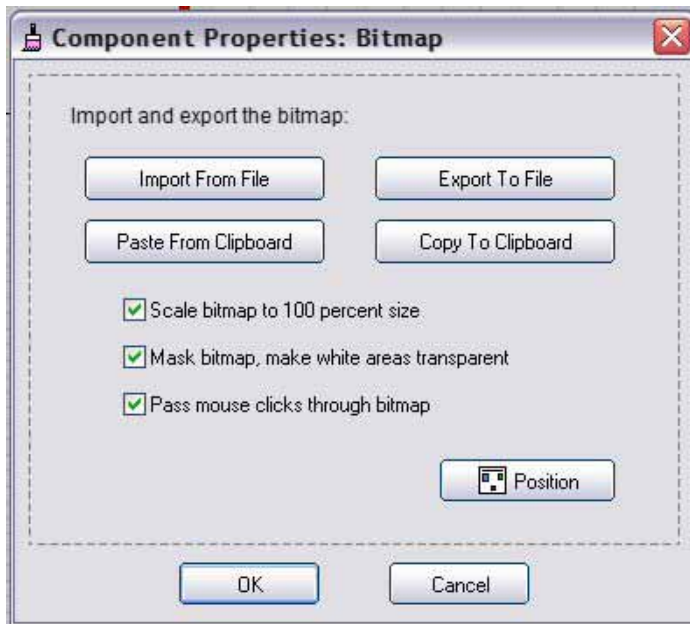
# Carousel Quick Start Guide



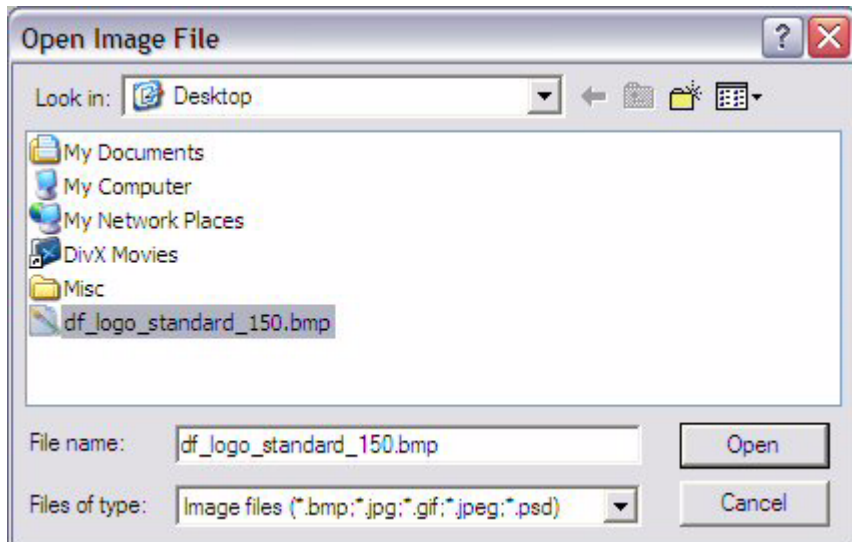
2. From the **Components** list, select **Ornaments** > **Bitmap**. Drag and drop the **Bitmap** component onto the slide



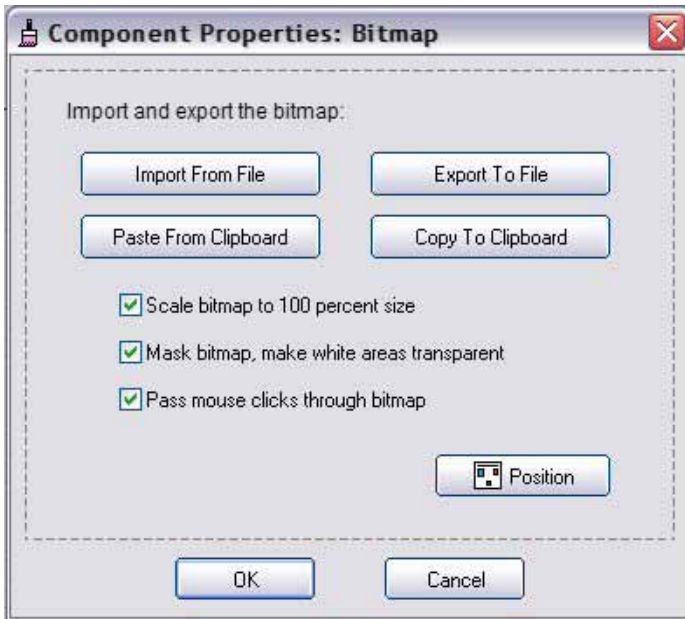
3. Double-click on the **Bitmap**. The **Component Properties: Bitmap** dialog box appears.



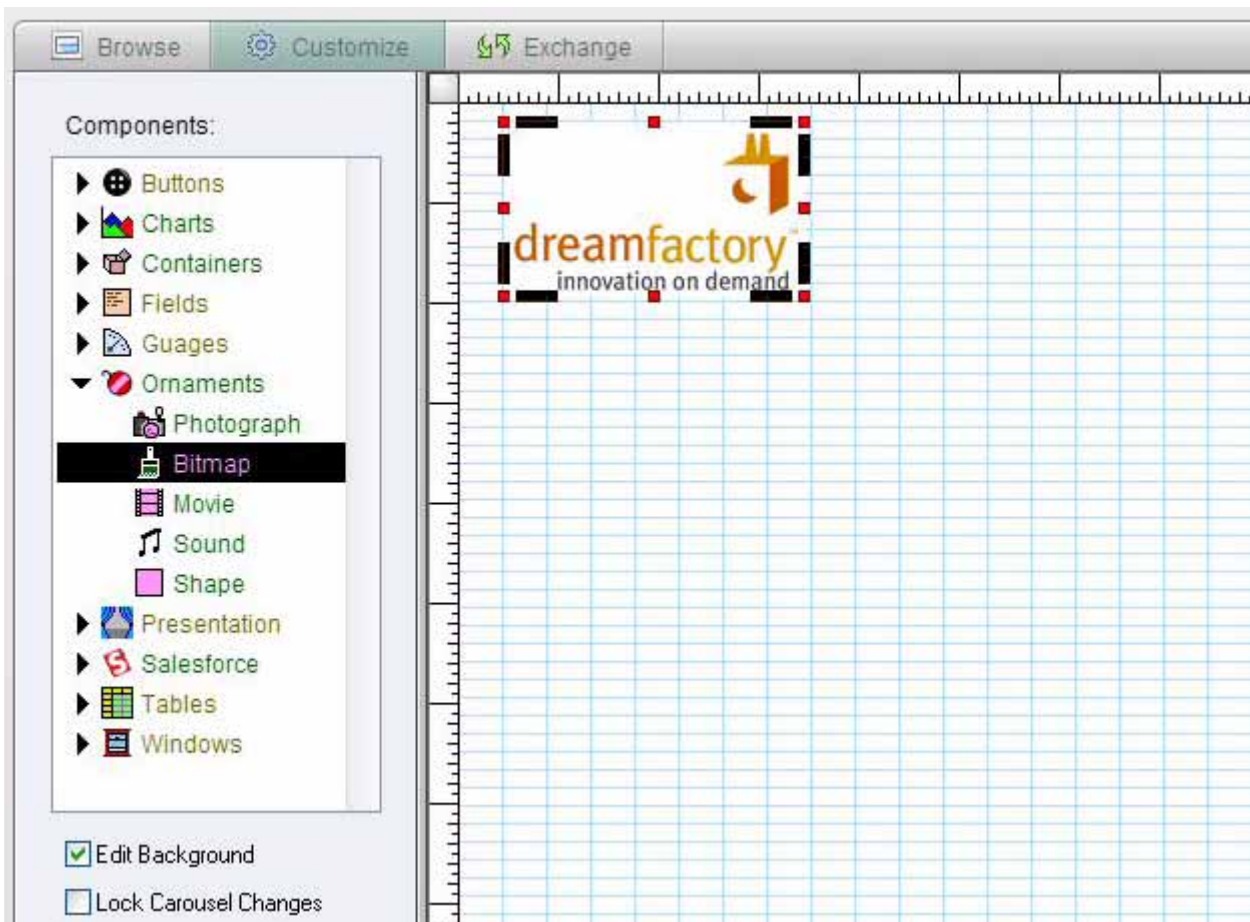
4. Click **Import From File**. The **Open Image File** dialog box appears. Locate the bitmap image you want to import and click **Open**.



5. Click **OK** in the **Component Properties** dialog box to confirm you want to import the bitmap.



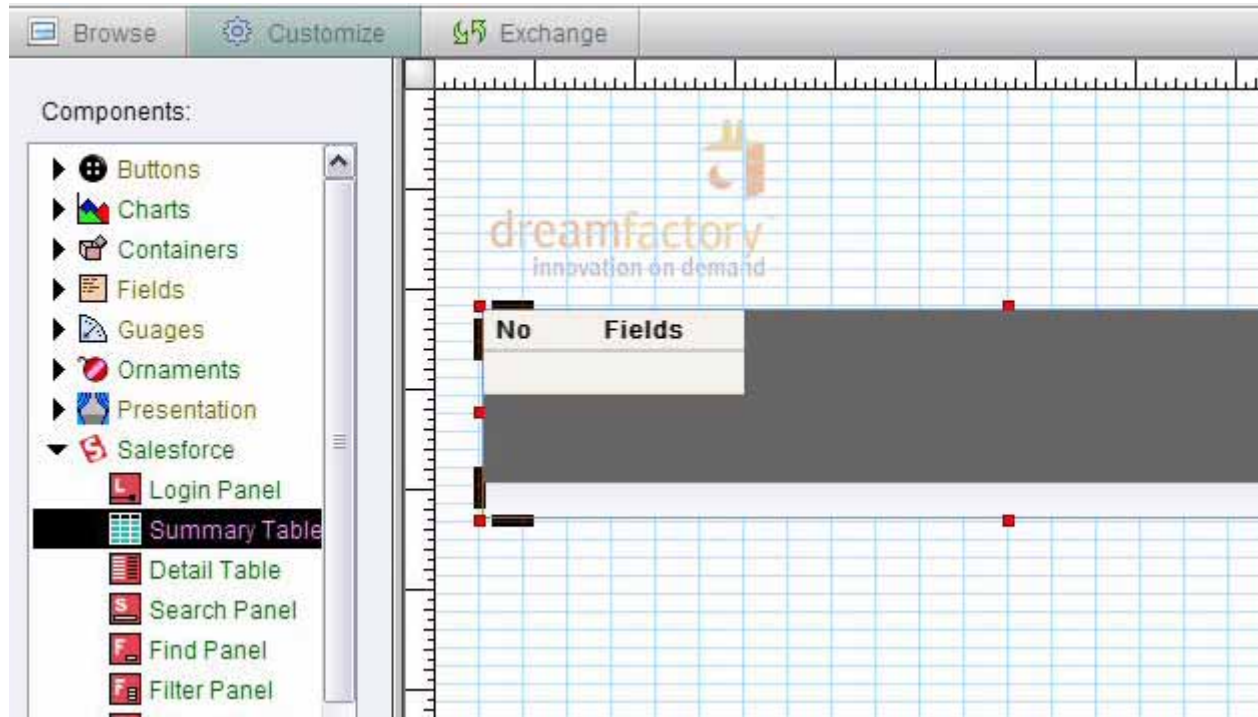
When you return to **Customize** view you can see your new bitmap has been added to the Slide.



## Adding Components to the Foreground of your Slide

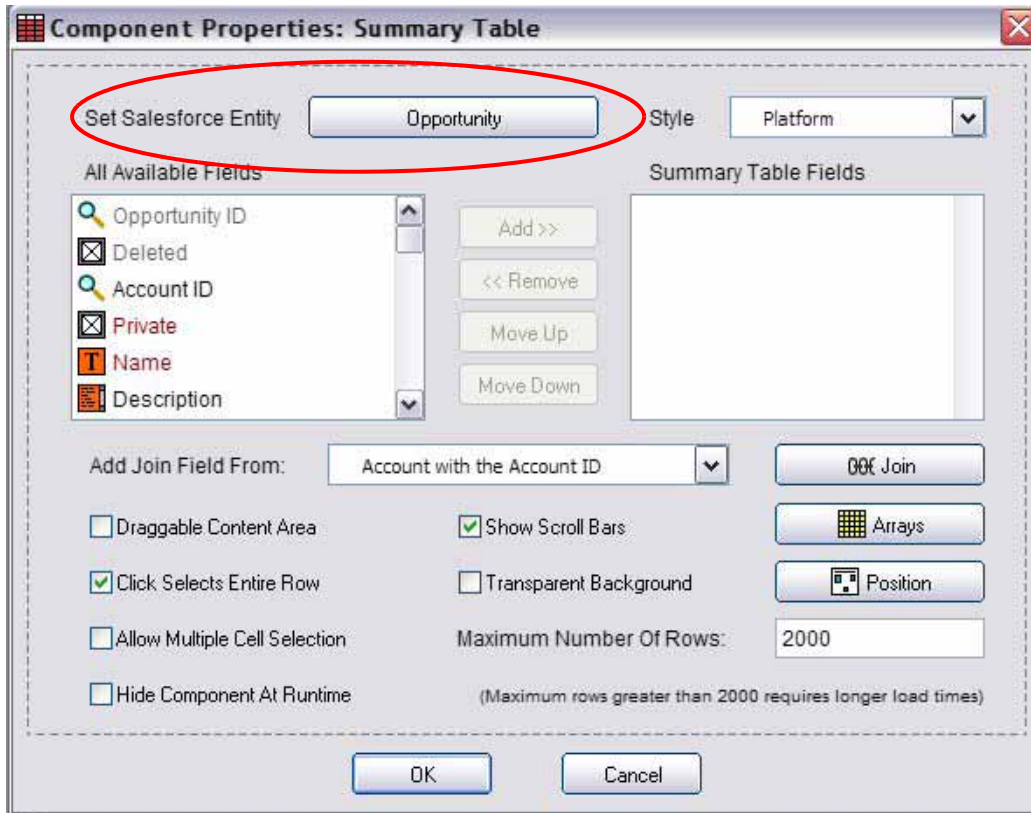
Now we have the logo on the background of the slides, we want to customize the foreground of the slides. Let's start our customization by adding a **Summary Table** to our slide. A **Summary Table** is the most common component for displaying data in your Salesforce account. Follow these steps to add a **Summary Table** to the **Slide**:

1. From the **Components** list, select **Salesforce** → **Summary Table**. Drag and drop the **Summary Table** onto your slide.



2. Double-click on the **Summary Table**. The **Summary Table Properties** dialog box is displayed.

**Note:** There are two other ways of accessing the **Component Properties** dialog box for a component. As well as double-clicking on the component, you can also right-click on a component and select **Component Properties**. Alternatively, you can select the component and click **Component Properties** on the **Main Toolbar**.

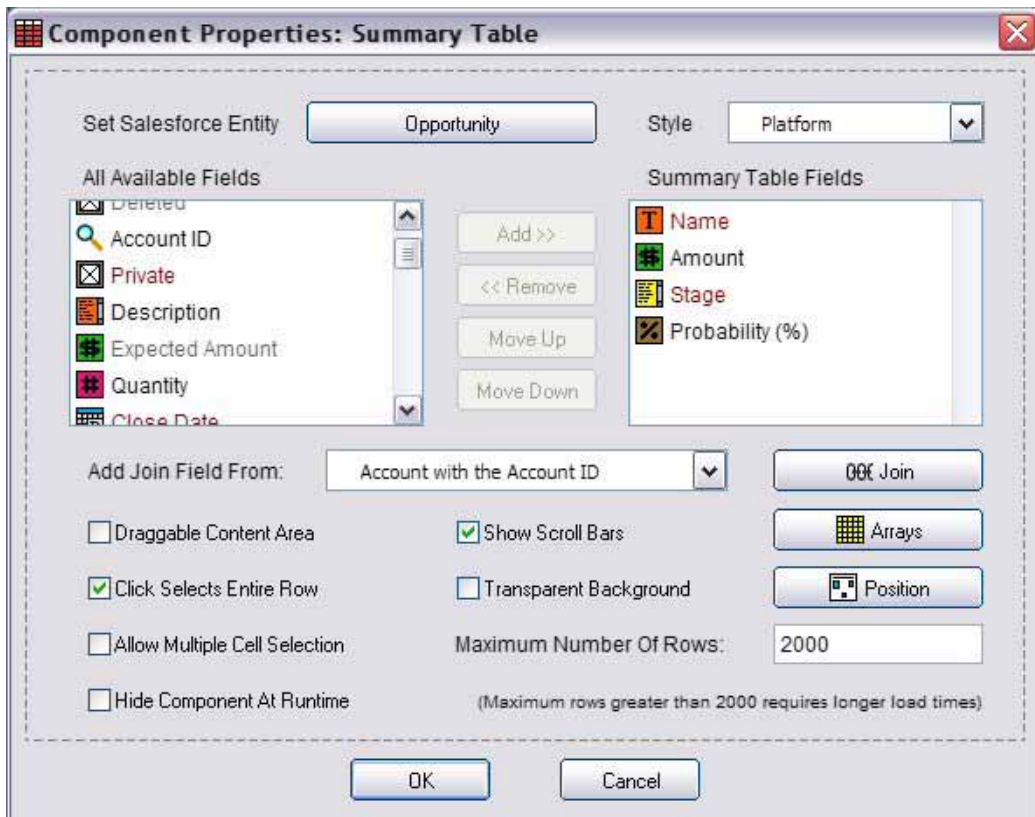


3. In this example, set the **Salesforce Entity** to **Opportunity**. If it is not set to **Opportunity**, click the button beside **Set Salesforce Entity** and select **Opportunity** from the list.

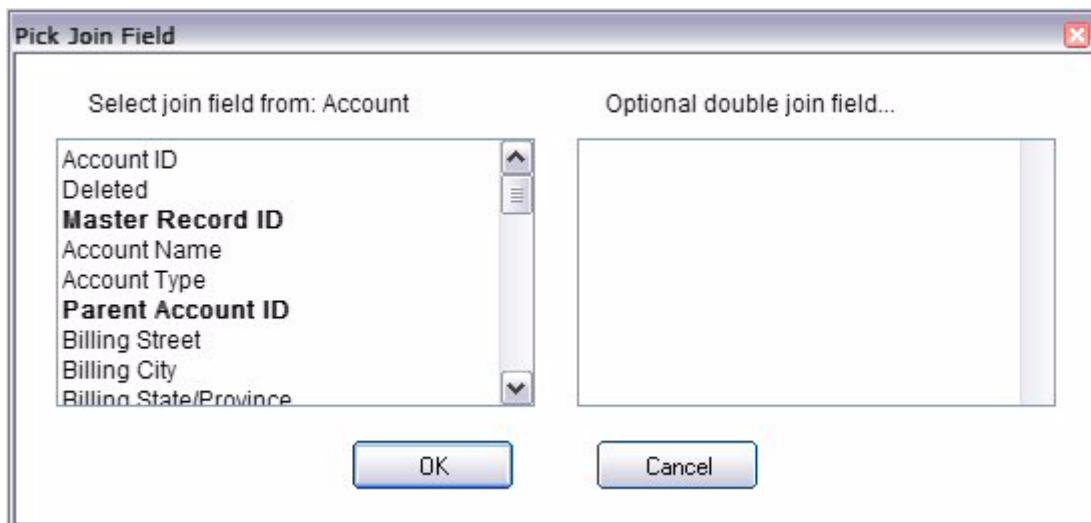
We also want to set a number of **Summary Fields** for our table. From the **All Available Fields** list, select

- **Name** and click **Add**
- **Amount** and click **Add**
- **Stage** and click **Add**
- **Probability** and click **Add**

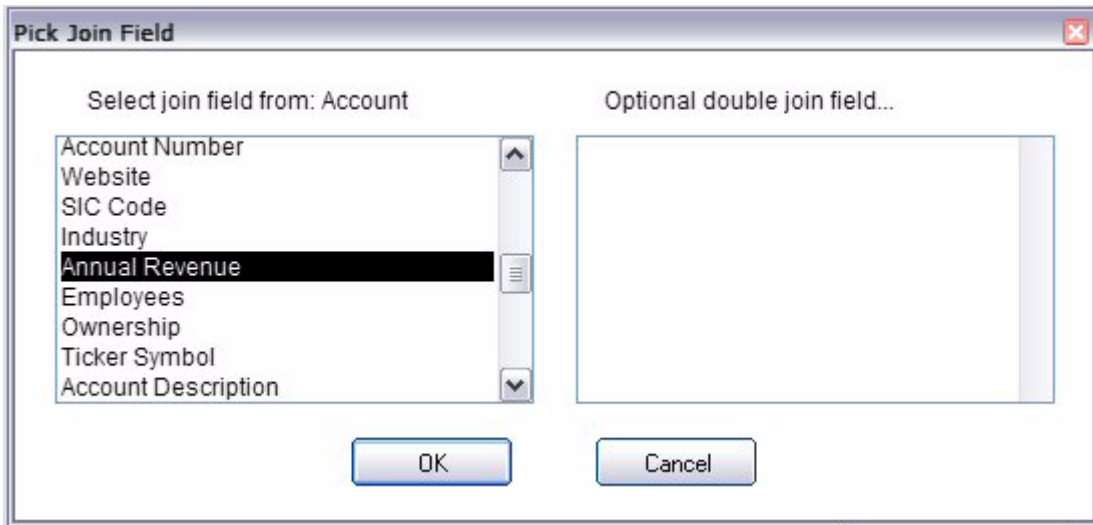
All the fields you selected are now displayed in the **Summary Table Fields** list.



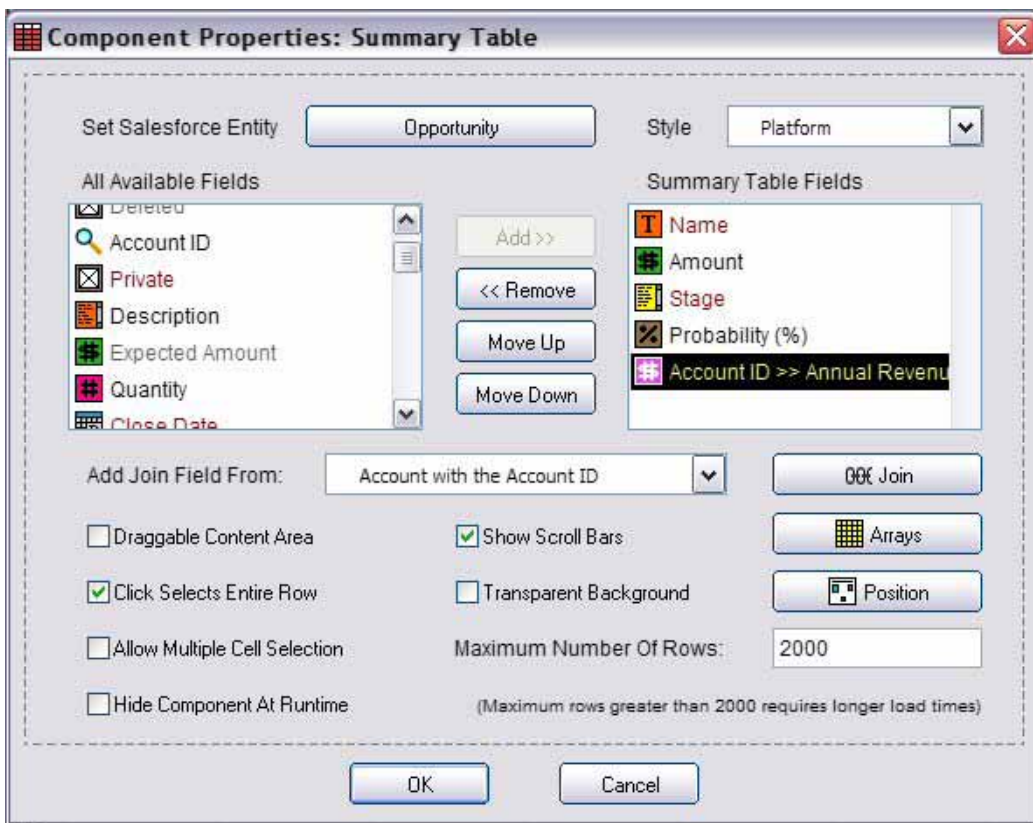
4. You can also select fields from related objects. For example, you might want **Account** information related to an **Opportunity** displayed in the same **Summary Table**. Click **Join**. The **Pick Join Field** dialog box is displayed.



5. Select **Annual Revenue** from the **Select join field** list. Then click **OK**.

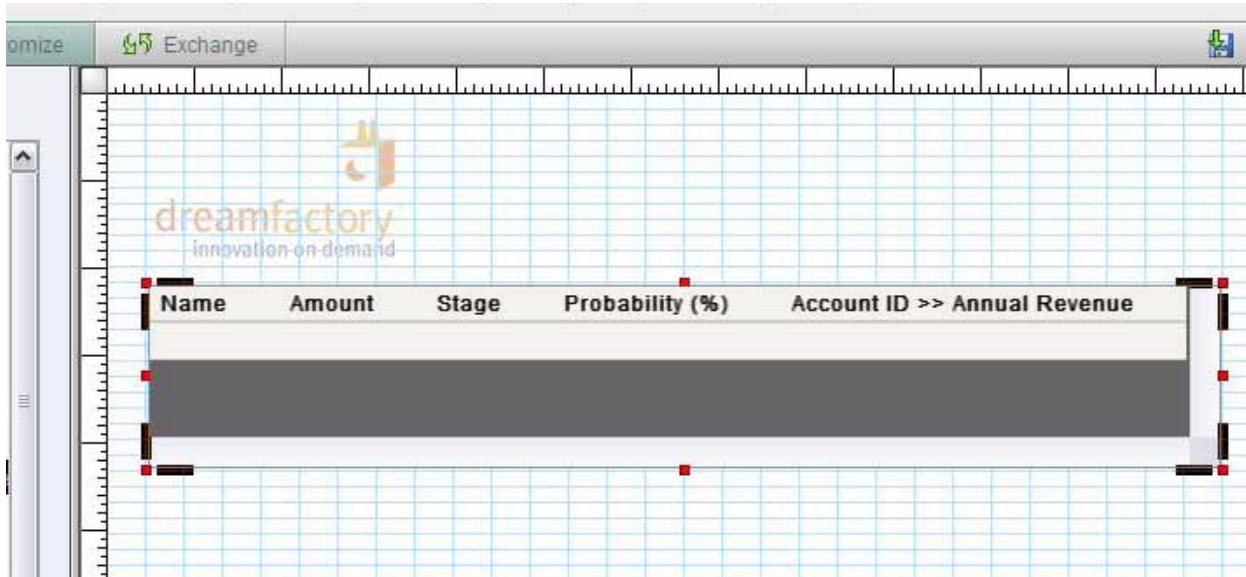


All the fields you selected are now displayed in the **Summary Table Fields** list.



**Note:** More join fields are available from the **Add Join Field From** drop-down list.

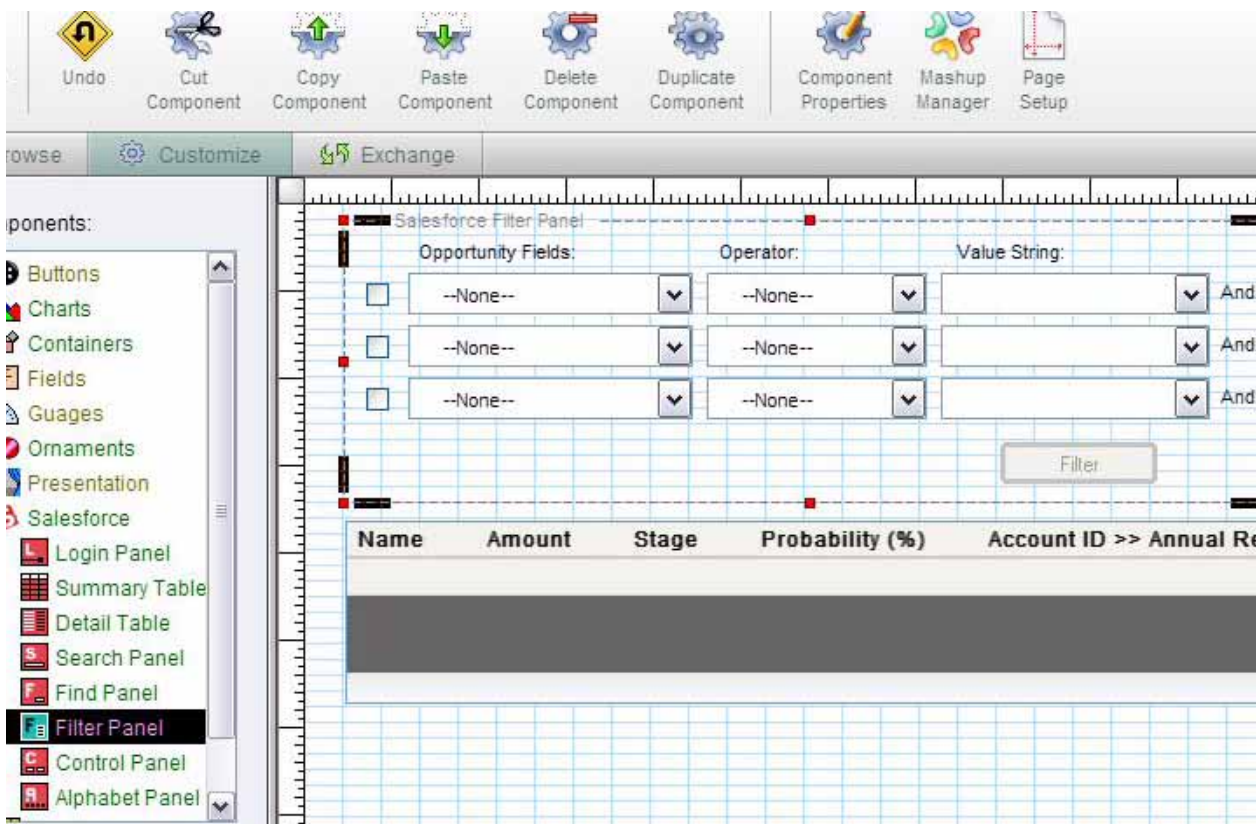
6. Click **OK** to save the **Summary Table** properties. The new **Summary Table** and all the fields you set now appear in **Customize** view.



## Adding a Filter Panel to the Slide and Creating a Mashup

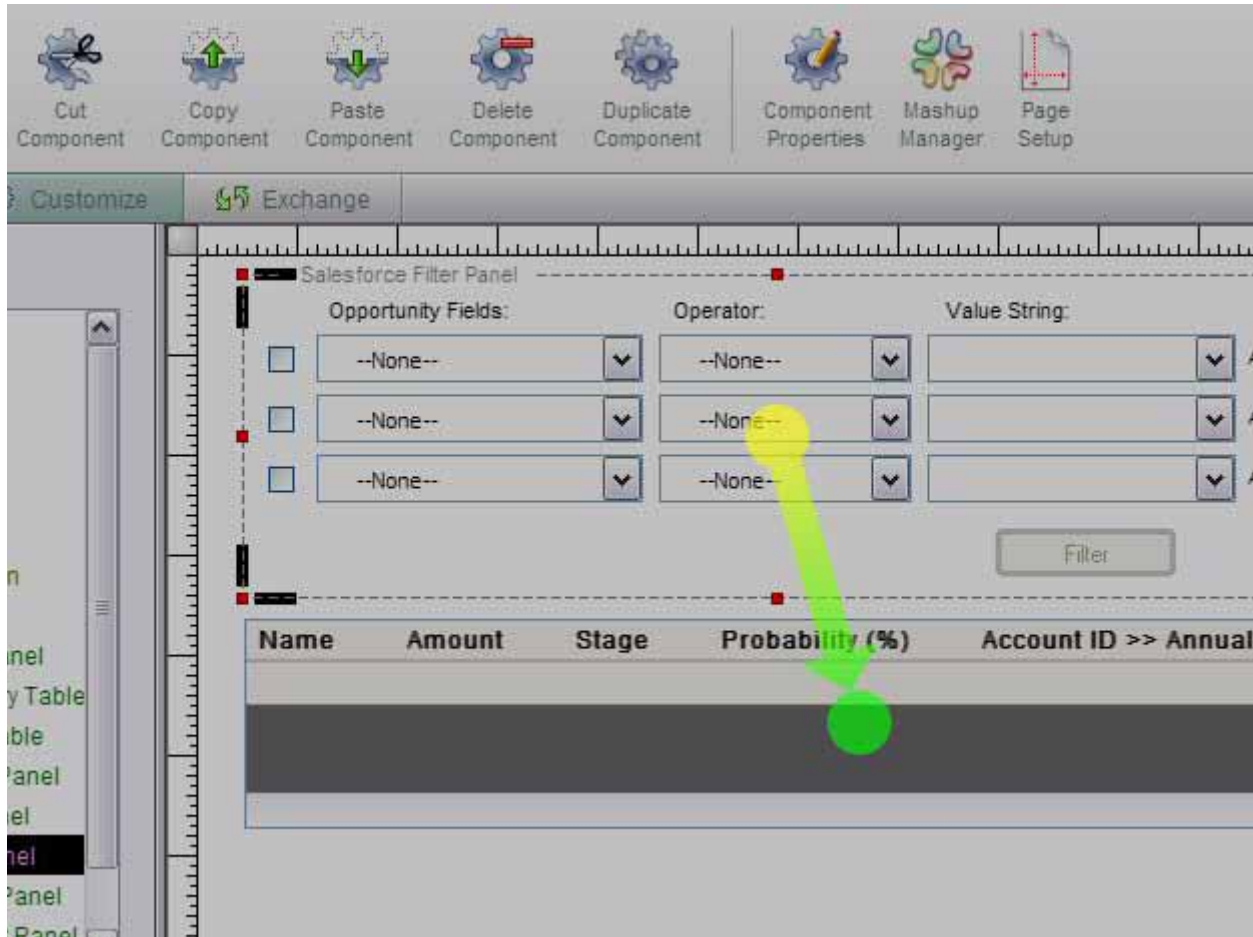
Now that we have a **Summary Table**, we need to add a **Filter Panel** so we can filter records that appear in the Summary Table. To add a **Filter Panel** to your slide, follow these steps:

1. From the **Components** list, select **Salesforce** ➤ **Filter Panel**. Drag and drop the **Filter Panel** onto the slide.



**Note:** You can position components on a **Slide** simply by dragging and dropping components to a desired location. In this example, we've moved the **Filter Panel** above the **Summary Table**.

2. Ensure the **Filter Panel** is selected and click **Mashup Manager**. Drag and drop the arrow from the yellow dot on the **Filter Panel** to the green dot on the **Summary Table**.



**Note:** If the arrow turns green your Mashup has been successful. If the arrow turns red when the components are selected, you will be prompted to define an **Advanced Mashup** in the **Mashup Manager** dialog window. To learn about the **Mashup Manager**, see the Carousel User Guide.

3. Go to **Browse** view to enter some filter criteria and populate the **Summary Table** with live data from your Salesforce account.

For this example we will set the following filter criteria:

- **Opportunity Fields = Amount**
- **Operator = greater than**
- **Value String = 100000**

Then click **Filter** to display the live data in the **Summary Table**.

Opportunity Fields:      Operator:      Value String:

Amount    greater than    100000    And

--None--    --None--                       And

--None--    --None--                       And

Name	Amount	Stage
Express Logistics SLA	\$120,000.00	Perception Analysis
Express Logistics Standby Generator	\$220,000.00	Closed Won
United Oil Emergency Generators	\$440,000.00	Closed Won
United Oil Installations	\$270,000.00	Closed Won
United Oil Installations	\$235,000.00	Closed Won

## Populating a Bar Chart with Summary Table Data

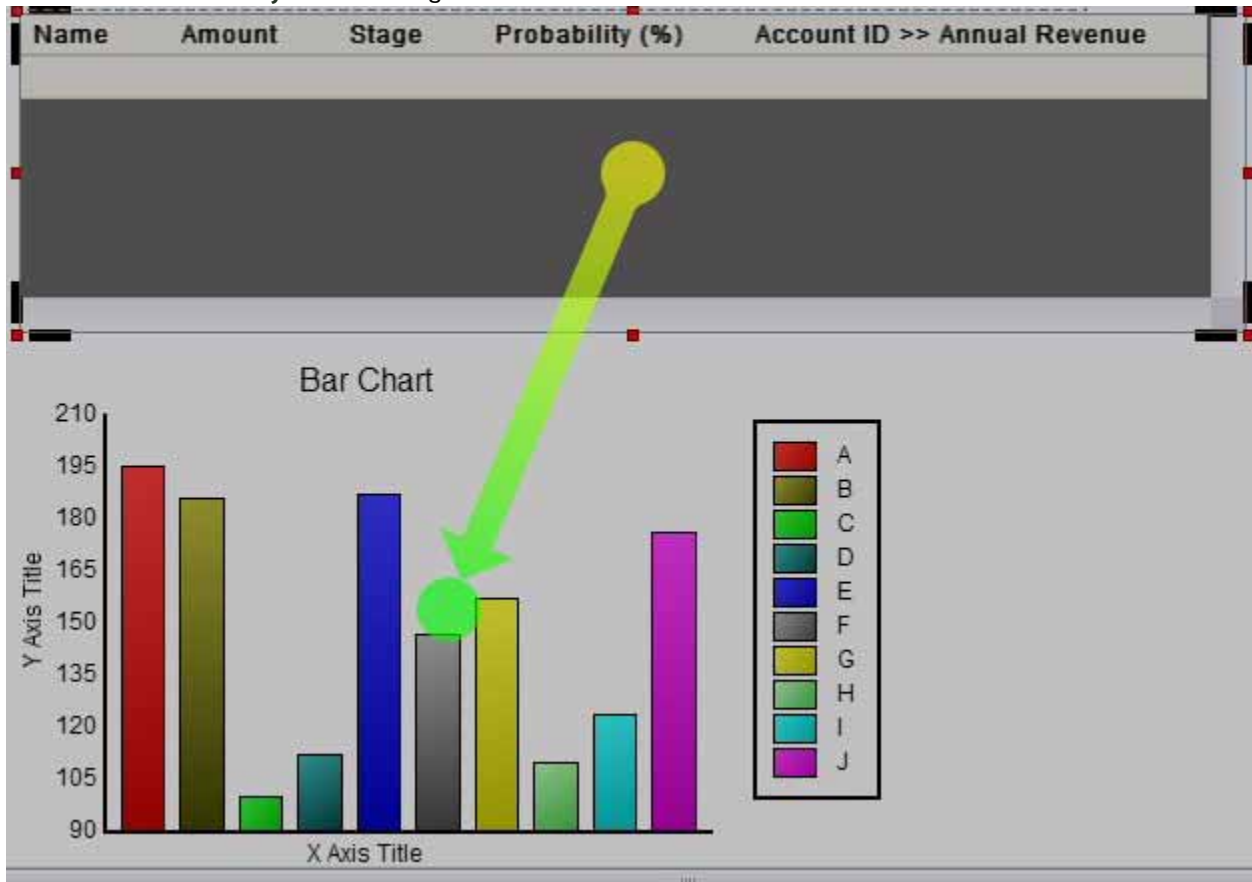
Now we have successfully populated a Summary Table with data, we want to display the data in a more meaningful manner. Let's graphically display our data in a Bar Chart. We need to create a Mashup between the **Summary Table** and the **Bar Chart**. To create a Mashup between the two components, follow these steps:

1. From the list of **Components** select **Charts** > **Bar Chart**. Drag and drop the **Bar Chart** onto the slide.

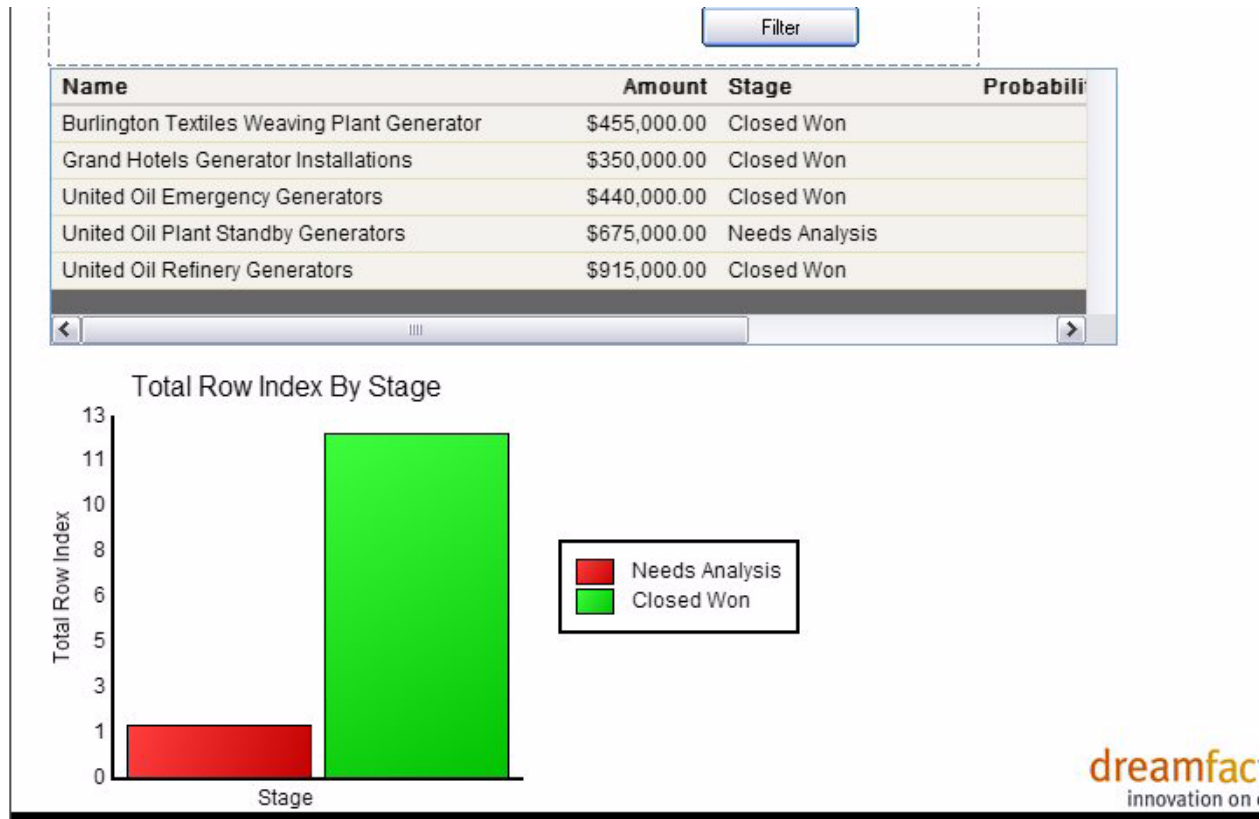
The screenshot shows a software interface with a component palette on the left and a bar chart on the right. The component palette includes categories like Gauges, Ornaments, Presentation, Salesforce, Tables, and Windows. The bar chart is titled 'Bar Chart' and displays data on a grid. The Y-axis is labeled 'Y Axis Title' and ranges from 90 to 210. The X-axis is labeled 'X Axis Title'. A legend on the right side of the chart lists categories A through J with corresponding colored squares. The bars in the chart are colored red, olive green, light green, blue, grey, yellow, light green, cyan, and magenta.

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2. Ensure the **Summary Table** is selected and click **Mashup Manager**. Drag and drop the arrow from the yellow dot on the **Summary Table** to the green dot on the **Bar Chart**.



3. Now go to **Browse** view and click the **Filter** button to see your live data displayed in the **Bar Chart**.



## Changing the Properties of the Chart in Browse View

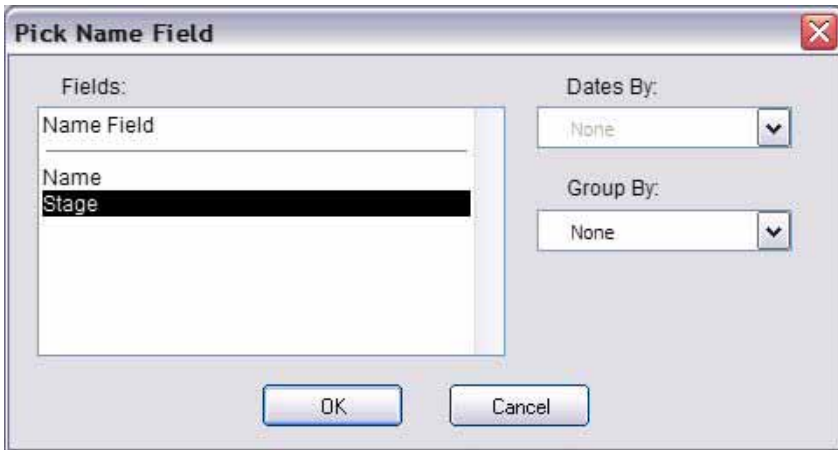
Even though we can see our live data displayed in the Bar Chart, we might want to change the data displayed in the chart. A key benefit of using Carousel is that you can easily manipulate the data in your charts on the fly.

Let's start by changing the X Axis:

1. Click on the **X Axis Title**. The **Pick Name Field** dialog box is displayed.

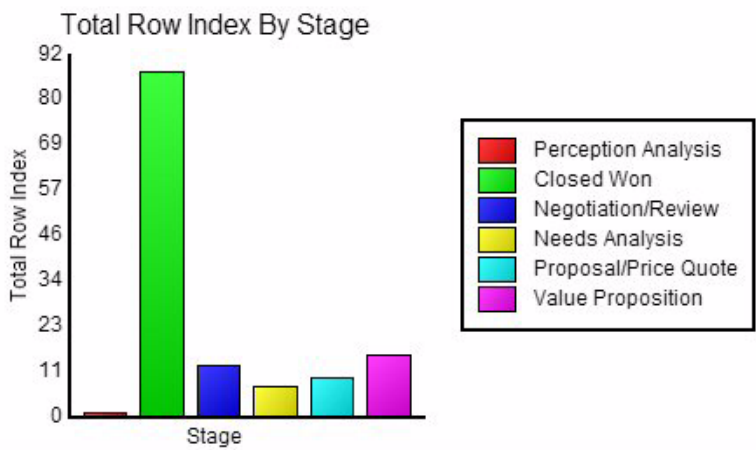


2. Select **Stage** from the **Fields** list and click **OK**.



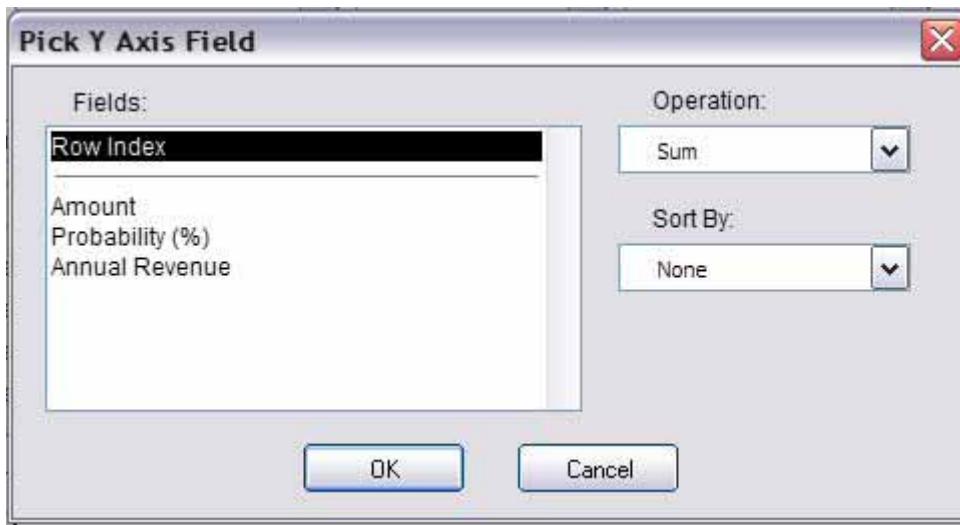
The **X Axis** now shows the **Stage** of the **Opportunity**.

Name	Amount	Stage	Prob
Express Logistics SLA	\$120,000.00	Perception Analysis	
Express Logistics Standby Generator	\$220,000.00	Closed Won	
United Oil Emergency Generators	\$440,000.00	Closed Won	
United Oil Installations	\$270,000.00	Closed Won	
United Oil Installations	\$235,000.00	Closed Won	
United Oil Installations	\$270,000.00	Negotiation/Review	

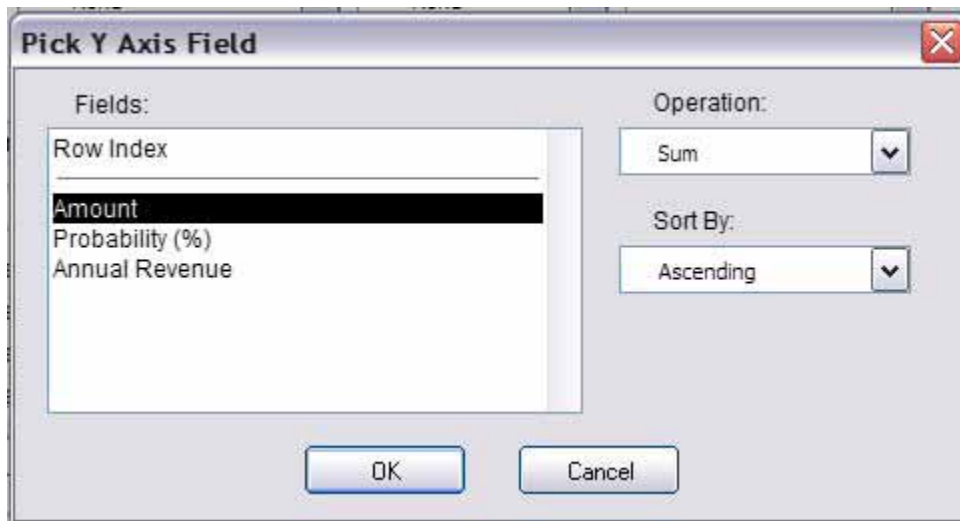


Now let's change the Y Axis Label.

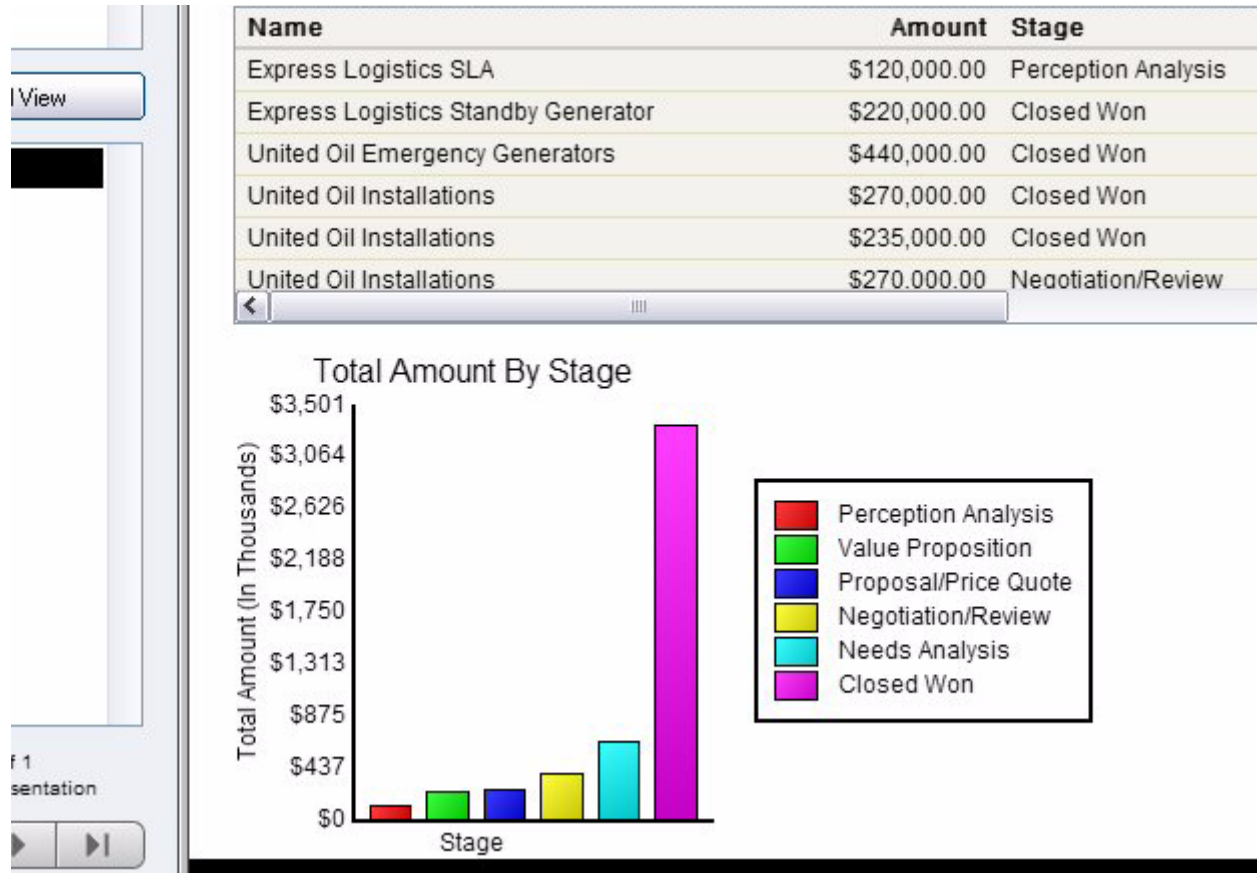
3. Click on the **Y Axis Label**. The **Pick Y Axis Field** dialog box is displayed.



4. From the **Fields** list select **Amount** and from the **Sort By** drop-down list, select **Ascending**. Then click **OK**.



5. Go to **Browse** view again. You can see that the chart now displays **Amount** in ascending order for each **Opportunity Stage**.



## How to Present a Carousel

Now that we have created and customized our Carousel, we want to present it to an audience. Follow these steps to launch the presentation:

1. In **Browse** view, click **Begin Presentation..**

The screenshot shows the software interface in 'Browse' view. A 'Begin Presentation' button is visible. Below it, a 'Salesforce Filter Panel' is shown with three filter rows. The first row is checked and set to 'Amount' greater than '100000'. Below the filter panel, a table of sales opportunities is visible.

Name	Amount	St
Express Logistics SLA	\$120,000.00	Pe
Express Logistics Standby Generator	\$220,000.00	CI

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The presentation launches in full screen mode.

Once you are in **Full Screen** mode, you can still change manipulate the data by changing the filter criteria and changing the X and Y axis on the bar chart.

### What Next?

For more information on Carousel see the Carousel User Guide and the Carousel Component Reference Guide.

Also, check out our Support Page [http://www.dreamfactory.com/carousel/about\\_www.html](http://www.dreamfactory.com/carousel/about_www.html) for information about our scheduled training sessions.

