



# **Atrio Goal Wizard**

Version 8

## **Installation and Configuration Guide**

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## Introduction

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This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn the basics of installing the Atrio Goal Wizard. It describes some of the prerequisites to using the utility, along with a step by step guide on how to install the managed solution.

Atrio Goal Wizard lets your quickly create and copy goals to track business performance.

Features:

- Process driven wizard
- Bulk goal creation
- Excel like editor
- Copy and paste goals from Excel and other data sources
- Supports, Periods, Stretch goals, query types, multiple goal owners
- Auto calculate period goals based on Annual goal values
- Sortable grid
- Goal Copy functionality
  - Copy original goals
  - Copy to new period (year, quarter, etc.)
  - Increase/decrease percentage
  - Increase/decrease period amount
  - Increase/decrease total amount

## Requirements

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The Atrio Goal Wizard is available for desktop systems only and has been tested on the following browsers:

- Internet Explorer 9+
- Google Chrome 43+
- Safari 8.0+
- Firefox 39

The Atrio Goal Wizard also requires a CRM 2016 or later and Atrio Common.

## Prerequisites

Before trying to use the Atrio Goal Wizard, it is strongly recommended that a user already have a basic understand of the following CRM items:

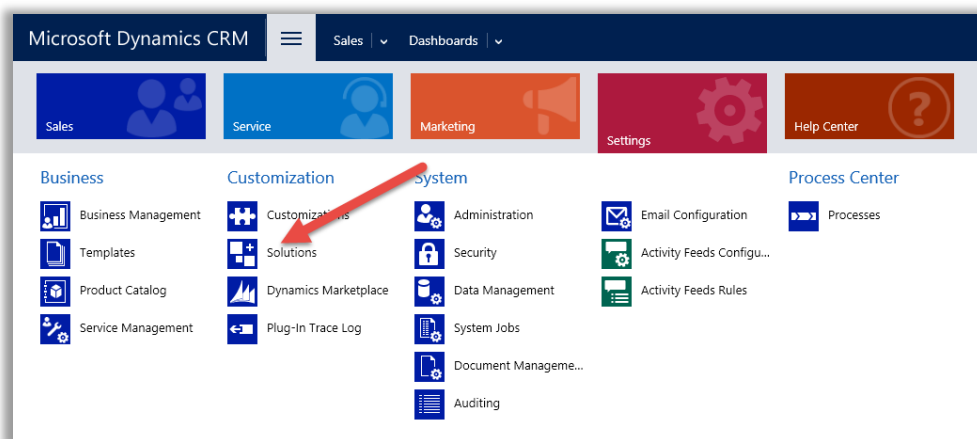
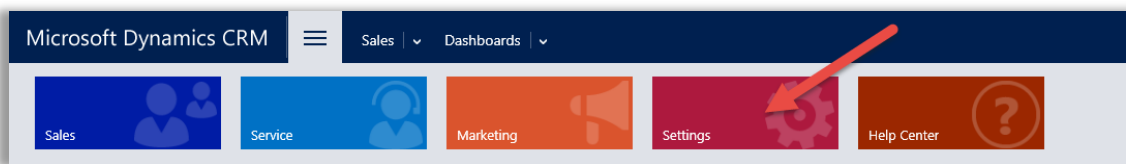
- Goals
- Goal Rollup Fields
- Goal Metrics
- Goal Metric Rollups
- CRM Fiscal Period Settings

For more information on these items, please seek the Microsoft documentation.

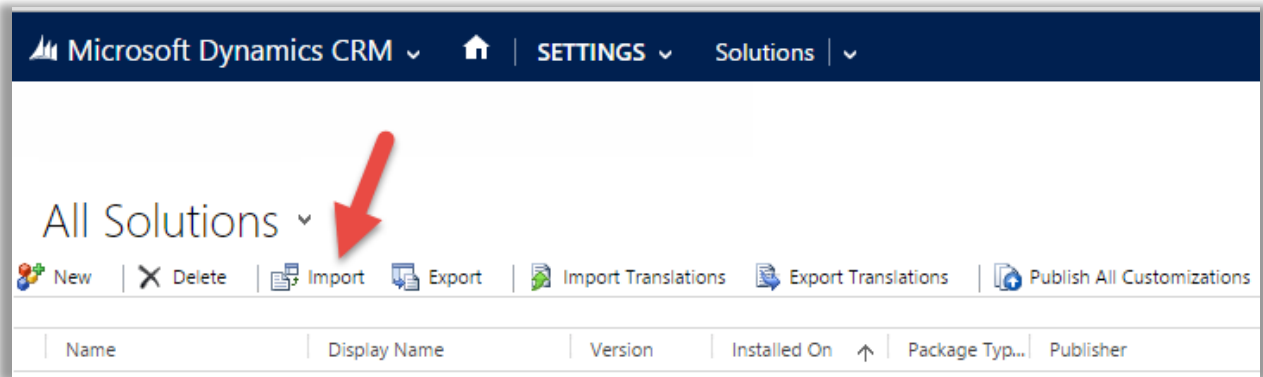
## Getting Started

### Importing the Managed Solution

1. After downloading the managed solution from the Atrio webpage, as an Administrator, navigate to **Settings -> Solutions**.



2. Click **Import** and browse for the managed solution. After that, simply follow the wizard to import the managed solution.



3. Atrio Goal Wizard also requires Atrio Common. Follow the steps above once again with the Atrio Common solution.

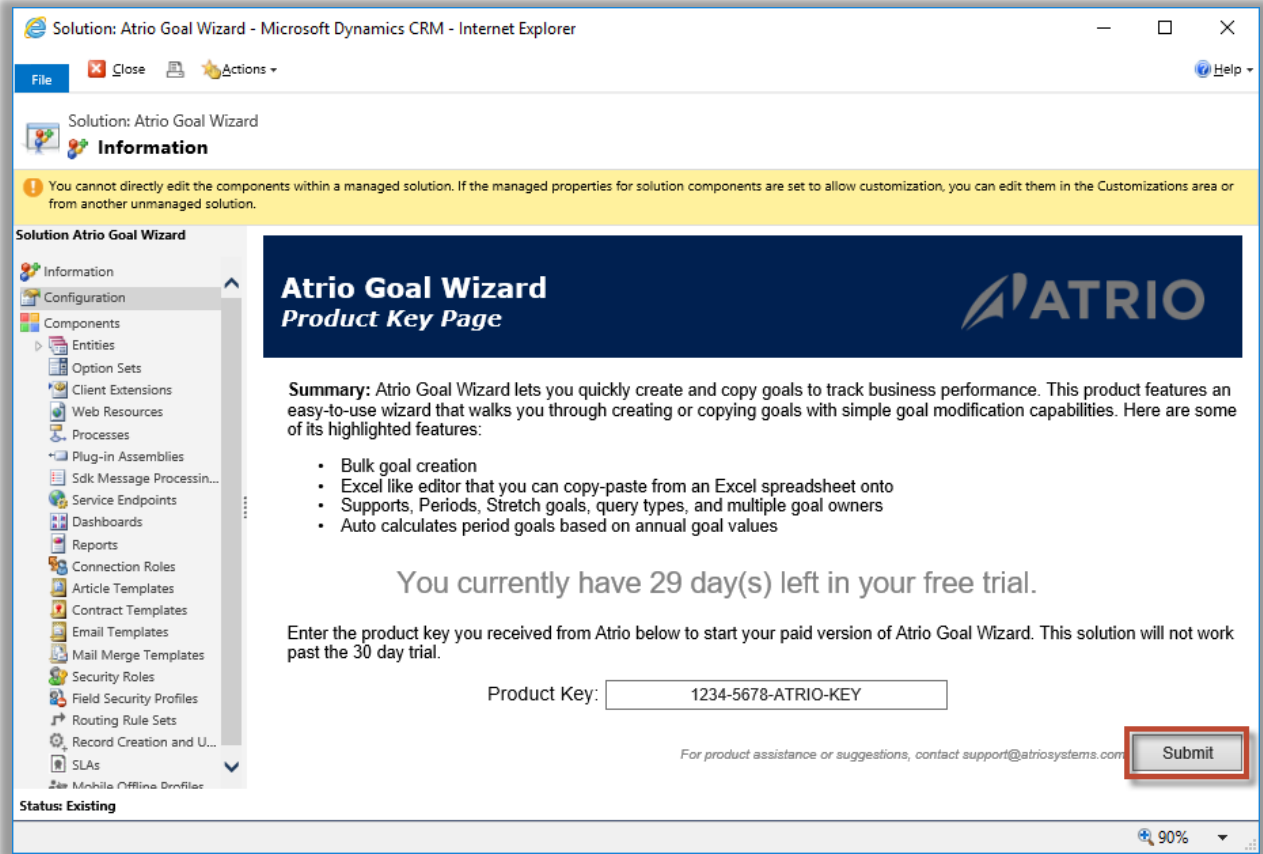
## Product Key

After 30 days of use, Atrio Goal Wizard will no longer work. To enter a purchased product key, follow the steps below.

1. Navigate to the **Solutions** page again and open up the **Atrio Goal Wizard** solution.

Name	Display Name	Version	Installed On ↑	Package Typ...	Publisher
AtrioMap	Atrio Map	8.3.0.3	8/9/2016	Managed	Atrio Systems
AtrioAlertsPro	Atrio Alerts Pro	8.0.0.2	8/9/2016	Managed	Atrio Systems
AtrioGoalWizard	Atrio Goal Wizard	8.0.1.1	8/9/2016	Managed	Atrio Systems
AtrioCalendar	Atrio Calendar	8.0.2.3	8/9/2016	Managed	Atrio Systems
AtrioAccelerator	Atrio Accelerator	8.0.1.2	8/5/2016	Unmanaged	Atrio Systems
AtrioAddressAutoComplete	Atrio Address Auto Compl...	8.1.1.0	8/5/2016	Managed	Atrio Systems
AtrioAlert	Atrio Alert	8.0.0.0	5/3/2016	Managed	Atrio Systems
AtrioCommon	Atrio Common	8.0.0.3	5/3/2016	Managed	Atrio Systems

2. The **Configuration Page** will appear. Towards the bottom of the page will be a slot for the product key. Type in the product key you received from Atrio and click **Submit**. If you do not have a product key, contact Atrio at [support@atriosystems.com](mailto:support@atriosystems.com) to receive one.



## Support

Please send any product issues or suggestions to [support@atriosystems.com](mailto:support@atriosystems.com).

## Disclaimer

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