

DECIPHERTECH

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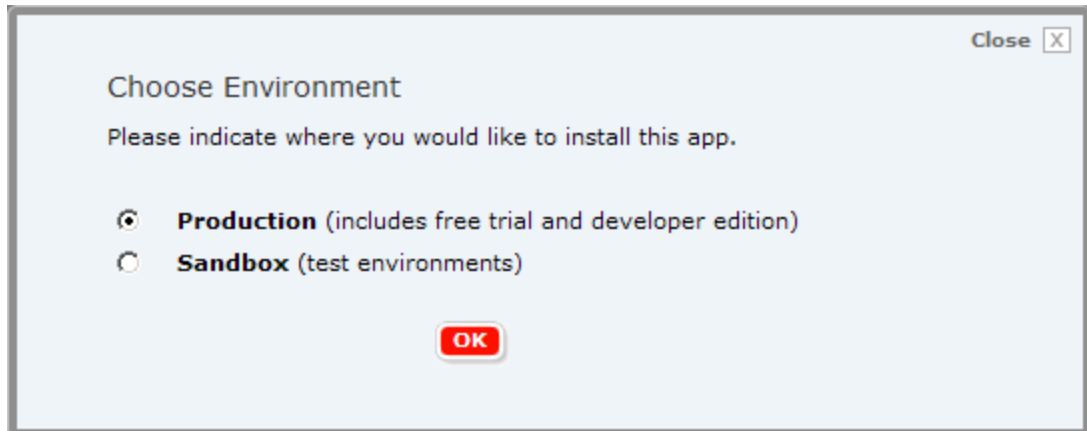
Decipher Sales Analytics for Salesforce Installation

There are only a few steps necessary to begin the process of using the Decipher for Salesforce Application. The following steps are required to get things started. Please follow the steps outlined below or call one of our technicians to guide you through the process (1-888-8-DECIPHER).

- There are two ways you may get to the “Get it Now” function on Salesforce.com’s AppExchange to install Decipher application. One is by clicking on the “Get It Now” link below or by clicking on a link provided by DecipherTech, for example, in an email we have sent you. Whether you are logged into Salesforce.com already or not, you will be asked to login first (Salesforce.com always asks for a login to initiate a package installation).

[Get It Now](#)

The other way is to visit [DecipherTech’s AppExchange listing](#) and then click on the “Get It Now” button. You will be asked the following question and you should choose the option appropriate for your Salesforce.com installation and environment (if you are unsure, see your Salesforce Administrator).



Choose Environment

Please indicate where you would like to install this app.

Production (includes free trial and developer edition)

Sandbox (test environments)

OK


Close X

If you are following this method, and whether you are logged into Salesforce.com already or not, you will be asked to login (Salesforce.com always asks for a login to initiate a package installation After login you will again be taken to Decipher AppExchange Listing and you need to click on the “Get It Now” button again).

Next you will be asked to agree to the Terms & Conditions, as shown below:

Confirm Installation

What You Are Installing

**AppExchange Security Reviewed**
Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

App Title: Decipher Sales Analytics
Package Name: Decipher Version: Version 1.4 / 1.4.0
Subscription: Free Trial
Duration: 30 Days
Number of Subscribers: 3 Subscribers

Where You Are Installing

Organization: DecipherTech Inc. Want to install into a different organization? [Logout](#) and try again as a different user.
Edition: Enterprise Edition
User Name: admin@deciphertech.com

Terms & Conditions

Salesforce.com Terms & Conditions:

If salesforce.com is not listed as the provider of this application, or if the provider listed is Force.com Labs, then the application is not provided or warranted by salesforce.com. You and/or other users at your company may be able to use this application to access your or your company's data in the salesforce.com system. However, using this application may also result in transmission of such data out of the salesforce.com system. To the extent data is transmitted out of the salesforce.com system, salesforce.com is not responsible for the privacy, security or integrity of that data.

I have read and agree to the above terms & conditions

After clicking Install on the Terms & Conditions page you will be asked to confirm your password.

Close

Please verify your Password

To protect your account, you need to confirm your Password.

Password:

From either of the methods followed above, you will be provided with Package Installation Details. Click on Continue button.

Package Installation Details

Package Name Decipher

Version Name Version 1.3

Version Number 1.3

Publisher DecipherTech, Inc.

Description Keen insights for assessing and improving the health of your sales pipeline. Decipher's analytics platform and immediate results. The benefit everything needed to achieve superior sales performance.

Continue
Cancel

Package Components

▼ Apps (1)

Action	Component Name	Component Type	Installation Notes
Create	Decipher	Custom App	This is a brand new

▼ Resources (36)

Action	Component Name	Component Type	Installation M
Create	Decipher Pipeline by Rep by Age	Custom S-Control	This is a brai
Create	Decipher Wins by Company Annual Revenue	Custom S-Control	This is a brai
Create	Decipher Pipeline by Channel by Type	Custom S-Control	This is a brai
Create	Decipher Pipeline by Age	Custom S-Control	This is a brai
Create	Decipher Pipeline by Region by Type	Custom S-Control	This is a brai
Create	Decipher Profit Margin by Product	Custom S-Control	This is a brai
Create	Decipher Logo	Document	This is a brai

NOTE: on the lower half of the screen you will see a list of Package Components. Included in this list are over 30 analytic charts (Component Type = Custom S-Control). For a Free Trial Period provided with Get it Now, you will be set up to use up to 10 of these charts during the Trial Period. After completing Step 8 below, you will be contacted by DecipherTech to set up your Salesforce.com data and determine the appropriate charts to be included in your Free Trial Period package.

- **Step 1:** Approve Package API Access: click Next button

Step 1. Approve Package API Access Step 1 of 3

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	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Documents	✓	✓	✓	✓					

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.

- **Step 2:** Choose security level: Select "Grant access to all users" and click Next button.

Step 2. Choose security level Step 2 of 3

Select security settings

Admin access only Best for limited deployments. Users with your profile will have full access.

Grant access to all users All user profiles will have full access

Select security settings Recommended for most packages

- **Step 3:** Click Install button

Step 3. Install Package Step 3 of 3

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

- **Step 4: Install Complete:** Click on “View Package Contents”

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; 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. Configure any additional settings for this package from the package detail page.

[View Package Contents](#)

- **Step 5: Give users access to Decipher Package:** Click on “Manage Licenses” button or go to Setup > App Setup > View Installed Packages > select Decipher under Installed Packages > select “Manage Licenses” link for Decipher package

Package Details Decipher [Help for this Page](#) ?

[Back to List: 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!](#)

Package Detail		Uninstall	Deploy	Manage Licenses	Show Dependencies
Package Name	Decipher				Publisher: DecipherTech, Inc.
Status	Trial				Allowed Licenses: 3
Expiration Date	7/3/2009				Used Licenses: 0
Description	Keen insights for assessing and improving the health of your sales pipeline. Decipher's analytics platform offers rapid deployment and immediate results. The benefit: everything needed to achieve superior sales performance.				
Created By	Randy Pilkenton, 6/3/2009 4:42 PM				API Access: Unrestricted [Enable Restrictions]
					Modified By: Randy Pilkenton, 6/3/2009 4:42 PM

[Uninstall](#) [Deploy](#) [Manage Licenses](#) [Show Dependencies](#)

Add Users: Click on “Add Users” button

Package Details Decipher [Help for this Page](#) ?

[Back to Previous Page](#)

Package Name	Decipher	Publisher	DecipherTech, Inc.
Status	Trial	Allowed Licenses	3
Expiration Date	7/3/2009	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](#) [Remove Multiple Users](#)

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

Select Users: Select users including yourself who will have access to Decipher package and click “Add” button. You are limited to 3 users during the Free Trial Period.

Add Users
Decipher [Help for this Page](#) ?

View: All [Create New View](#)

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 checked="" type="checkbox"/>	Murphy, Dan	Sales Rep	✓	Standard User
<input checked="" type="checkbox"/>	Pilkenton, Randy	Sales Rep	✓	System Administrator

Selected Users

Action	Full Name
<input checked="" type="checkbox"/>	Murphy, Dan
<input checked="" type="checkbox"/>	Pilkenton, Randy

- **Step 6: Give access to Decipher application and Decipher tab to user profiles:** If you selected “Admin access only” instead of “Grant access to all users” in step 2 above then give access to Decipher application and Decipher tab to all profiles that users added above belong to otherwise skip this step.

Go to Setup > Administration Setup > Manage Users > Profiles. Click on Edit link for the profile that a user belongs to.

User Profiles

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Profile	New	
Action	Profile Name	User License
Edit	Contract Manager	Salesforce
Edit Del	Custom: Marketing Profile	Salesforce

Go to Custom App Settings section and check Visible checkbox for Decipher.

Custom App Settings

	Visible	Default		Visible	Default
Call Center	<input checked="" type="checkbox"/>	<input type="radio"/>	Marketing	<input checked="" type="checkbox"/>	<input type="radio"/>
Decipher	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Ideas	<input checked="" type="checkbox"/>	<input type="radio"/>			

Go to Custom Tab Settings section and change settings for Decipher tab to “Default On”. Click save button. Repeat the same steps for all user profiles that users added above belong to.

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

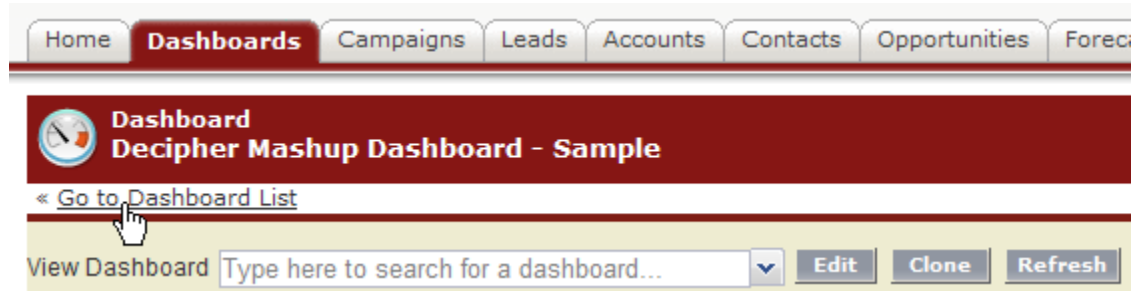
Accounts	Default On	Customizable Forecasts	Default On
Campaigns	Default On	Ideas	Default On
Cases	Default On	Leads	Default On
Console	Tab Hidden	Opportunities	Default On
Contacts	Default On	Portals	Tab Hidden
Contracts	Default On	Products	Default On
Dashboards	Default On	Reports	Default On
Documents	Default On	Solutions	Default On

Custom Tab Settings

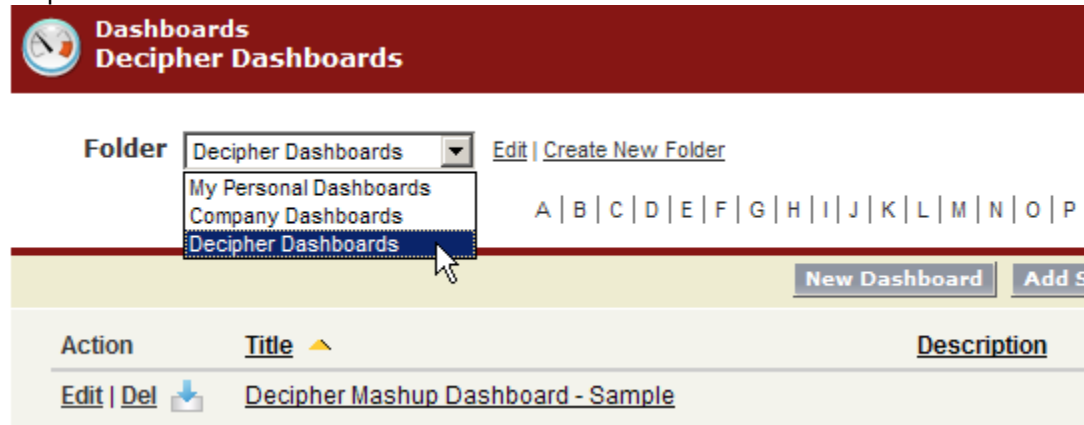
Decipher	Default On	DecipherTest	Default On
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- Step 7: Give access to “Decipher Mashup Dashboard - Sample” to users:** Decipher package includes a sample Salesforce dashboard called “Decipher Mashup Dashboard - Sample”. This sample dashboard demonstrates the functionality of mashing up Decipher Analytics inside Salesforce dashboards. This dashboard is mainly for administrators but if you would like to give access to your developers or users then click on Salesforce “Dashboards” tab otherwise skip this step. You can perform this step later also.

Click on “Go to Dashboard List” link under Dashboards tab.



Select “Decipher Dashboards” under “Folder” drop-down box and click “Edit” next to drop-down box.



Give access to users either thru “Public Groups”, “Roles” or “Roles and Subordinates”.

Dashboard Folder Edit
Decipher Dashboards (Managed)

This Folder is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Folder Edit [Save] [Delete] [Cancel]

Dashboard Folder Label: Decipher Dashboards
Folder Unique Name: Decipher_Dashboards ⓘ
Namespace Prefix: Decipher
Installed Package: Decipher
Public Folder Access: Read Only

This folder is accessible by all users
 This folder is hidden from all users
 This folder is accessible only by the following users:

Search: Roles for: [] [Find]

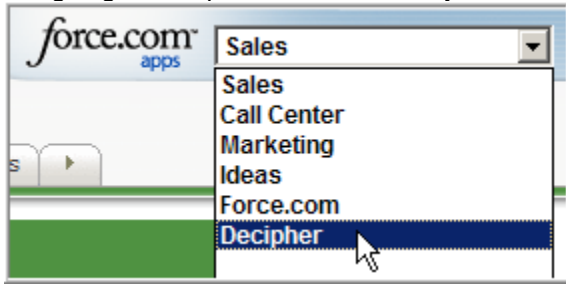
Available Roles:
Public Groups
Roles
Roles and Subordinates
Sales Rep

- **Step 8: Assign Account/User:** Assign a Salesforce account/user to DecipherTech for data extraction purpose (this user can be an existing user). This user will be used by Decipher to extract data from Salesforce. The user you assign will not be taken out of your production pool of users. The user id you assign will see no affect at all on his/her instance of Salesforce. No performance degradation or service interruption even when DecipherTech’s systems are extracting data from your system and loading to Decipher data warehouse. The only requirement is this user must have read access to all data.

We recommend that this user has “Read-Only” profile of Salesforce but it is not required. The user’s password will never be used or seen by DecipherTech. Per Salesforce.com security requirements, the password for the user is entered on our secure site using encryption technology approved and tested by Salesforce.com.

You will obtain the security token for this user by accessing this account and going to Setup > Personal Setup > My Personal Information > Reset My Security Token. You will receive the security token from Salesforce via email.

Select Decipher App: Select Decipher app under Force.com Apps drop-down box on top right corner (after getting the password and security token for the account that you will be assigning to DecipherTech to extract your data from Salesforce).



Select Decipher Tab: click on Decipher tab. Enter Salesforce credentials and click Save button. You can also access this page by going to "Setup" tab of Decipher application and click on the link "Provide SFDC Credentials" under "Salesforce Setup" folder. (note: don't go to Salesforce setup page to find this link).

A screenshot of a web form titled 'Provide SFDC Credentials'. The title is in an orange header bar. Below the header, there is a paragraph of text: 'Provide Salesforce.com login credentials having "Read Only" Profile. Login credentials will be used to extract data from Salesforce and data will be stored in Decipher.' Below this text are three input fields: 'User Name:', 'Password:', and 'Security Token:'. At the bottom of the form are two buttons: 'Save' and 'Cancel'.

After the SFDC credentials are saved, you will automatically go to the Decipher application/dashboard. It will have empty charts initially.

NOTE: Whenever you change the password for the above assigned user, you will need to also update it in the Decipher application by following the above step.

CONGRATULATIONS! A DecipherTech technician will contact you within 24 hours after the installation to schedule a time to extract your data from Salesforce and to load it into your Decipher data warehouse. Your data warehouse will provide Decipher analytic charts and dashboards.