

DECIPHERTECH

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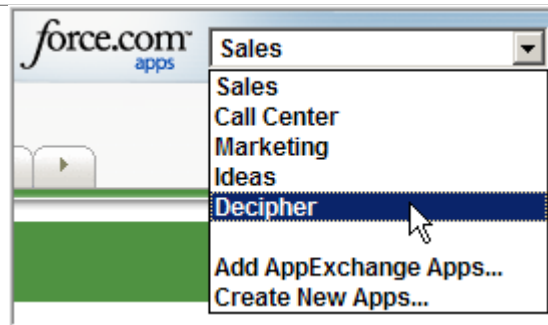
Email: support@deciphertech.com

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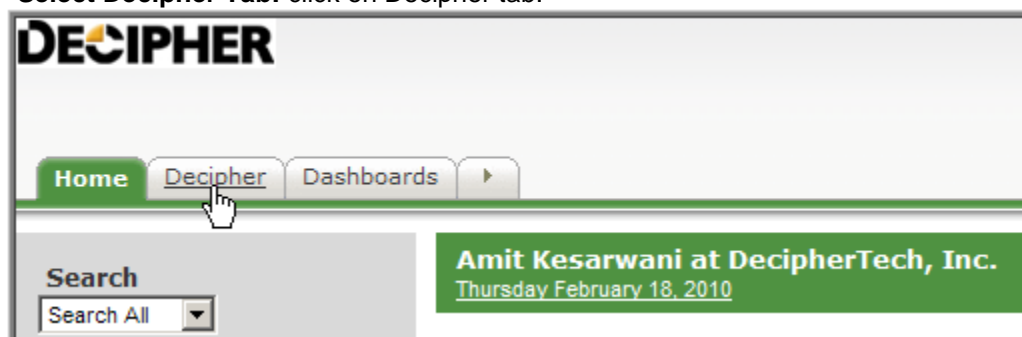
Decipher for Salesforce

Accessing Decipher application

1. **Select Decipher Application:** Login to Salesforce application. Select Decipher app under Force.com Apps drop-down box on top right corner of Salesforce user interface. If you do not see Decipher listed under drop-down box then contact your Salesforce administrator to give you access to Decipher application.



2. **Select Decipher Tab:** click on Decipher tab.



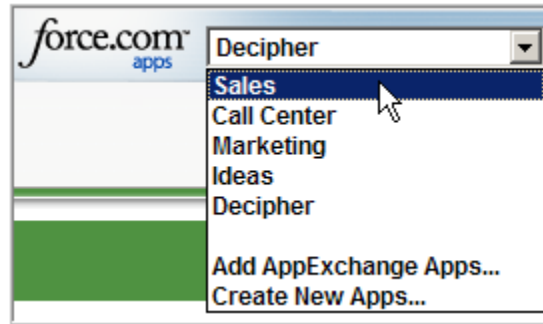
3. **View Decipher Application:** You will see the following screen once you click on Decipher tab.



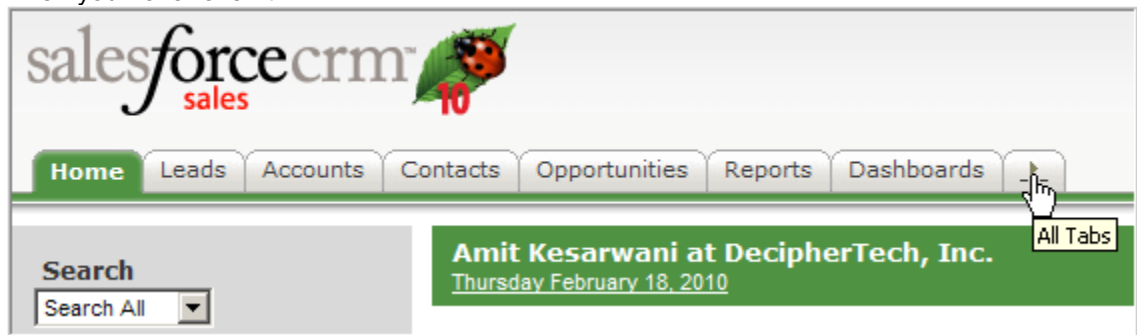
Adding Decipher tab to any Salesforce applications

If you prefer you can add Decipher tab to any Salesforce applications e.g. Sales.

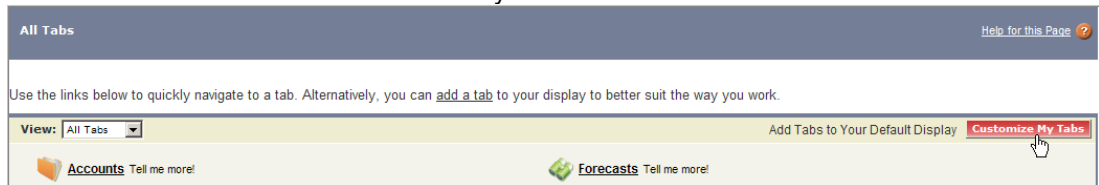
1. **Select Sales Application:** Select Sales app under Force.com Apps drop-down box on top right corner of Salesforce user interface.



2. **Select All Tabs:** Select right arrow icon at the end of the tabs. It will display "All Tabs" when you hover over it.



3. **Customize Tabs:** Click on "Customize My Tabs" button.



4. **Add Decipher Tab to Selected Tabs:** Select Decipher under “Available Tabs” list and click on right arrow icon to Add it to “Selected Tabs” list. Click on Save button. Now you can access Decipher tab within Sales application.

Customize My Tabs

Choose the tabs that will display in each of your apps.

Custom App:
Sales

Available Tabs		Selected Tabs
Campaigns		Home (default)
Cases		Leads
Contracts		Accounts
Customizable Forecasts		Contacts
Decipher	Add	Opportunities
DecipherTest	Remove	Reports
Documents		Dashboards
Ideas		
Products		
Solutions		

Up
Down

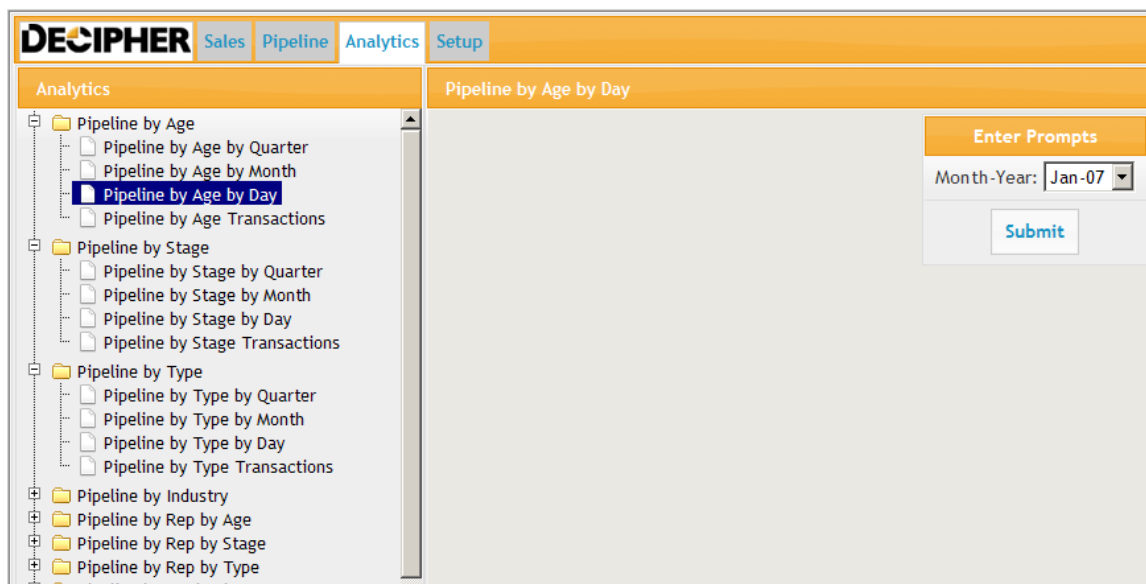
Save Cancel

Using Decipher Dashboards

Decipher application has multiple tabs and sub-tabs. Tabs are called Dashboards and analytics are placed under sub-tabs e.g. there are 2 dashboards (Sales and Pipeline) and multiple analytics in the following screen. You can select any dashboard by clicking on that tab and you can select any analytics by clicking on that sub-tab.

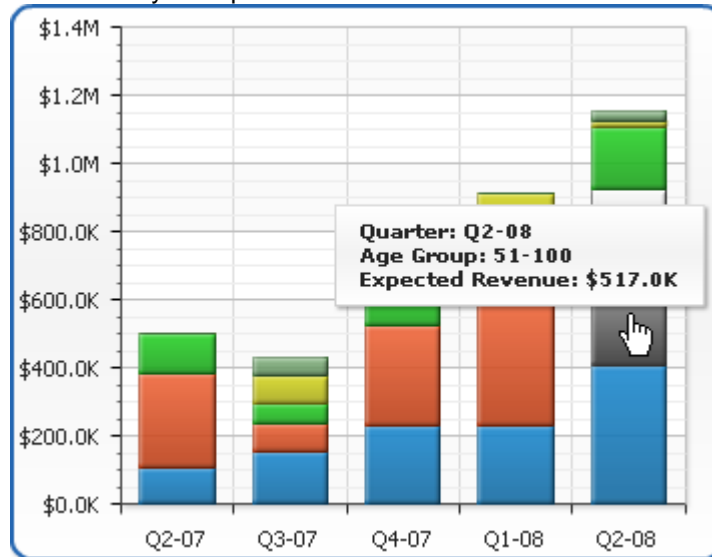


All analytics are also listed under “Analytics” tab (as in following screen); so you can directly run any analytics instead of going thru dashboards or drill-downs. Expand a folder in left panel and click on an analytics. When you run an analytics, it may prompt you to select certain parameters. Select a value from dropdown box for all parameters and click “Submit” button to run the analytics. Analytics will open in right panel. You can still drill-down on any analytics run this way.

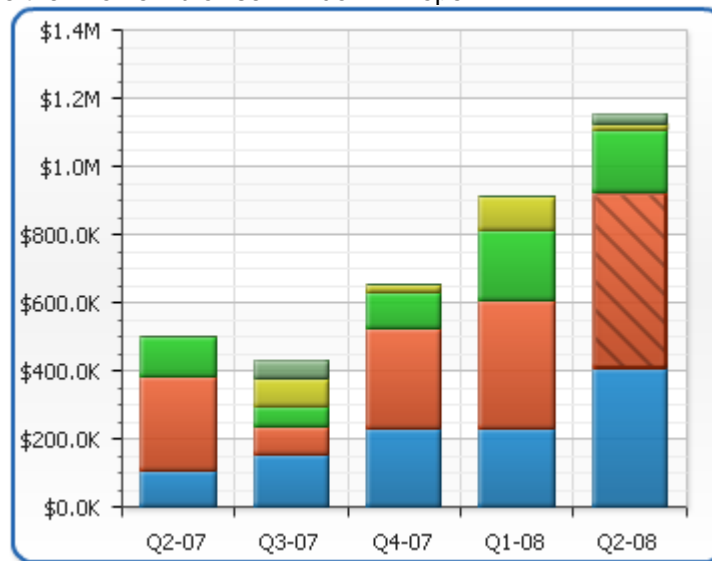


Using Charts

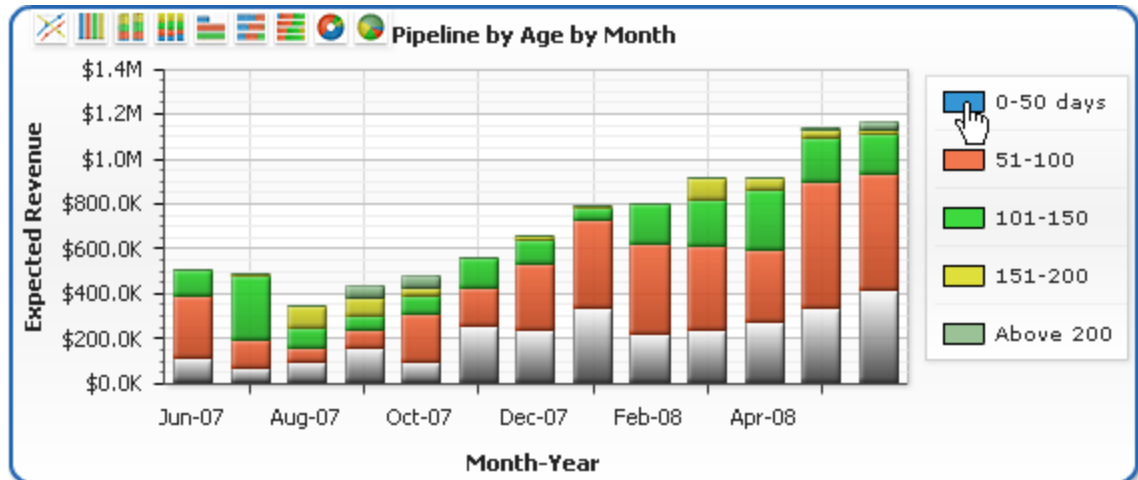
1. **View Data:** Hover over any data point to see the data value.



2. **Drill-Down on a Chart:** Click on a data point to drill-down. New analytics will open in a new browser window and data point in bar chart will have shaded lines. If there is no drill-down available then no new browser window will open.

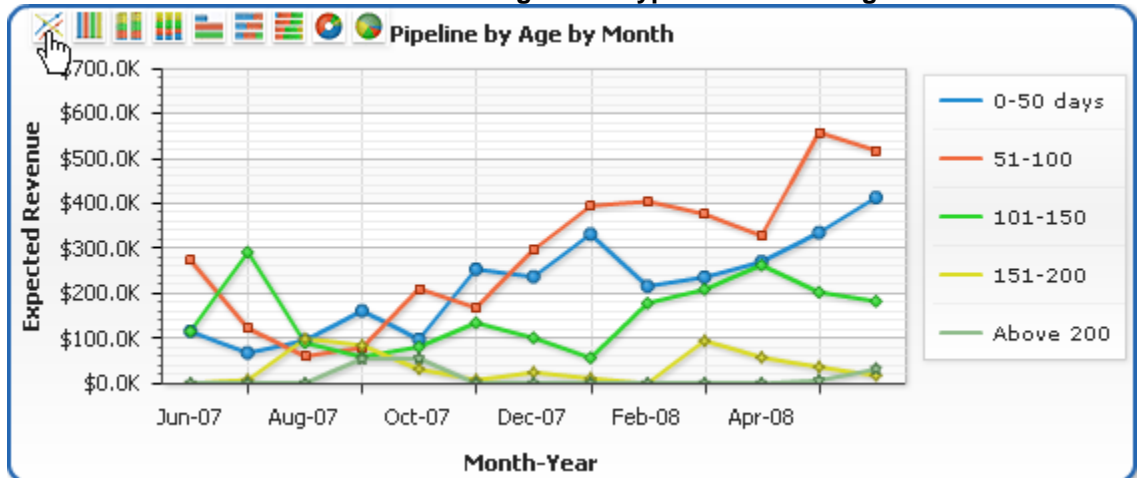


3. **View a Data Series:** Hover over a data series on the legend on right side and the color for series will change to black (fading to white vertically up).

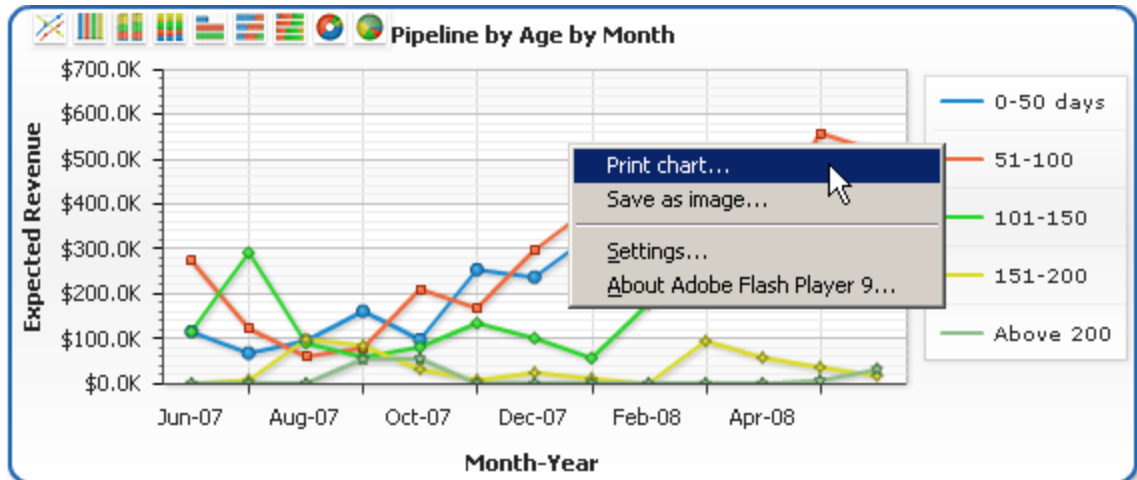


4. **Change Chart Type:** All analytics have a default chart type but you can change the chart type while viewing it. Double click on any chart icon on top-left corner to change the chart type. Chart type icons are arranged in following order: line chart, vertical bar chart, vertical stacked bar chart, vertical % stacked bar chart, horizontal bar chart, horizontal stacked bar chart, horizontal % stacked bar chart, doughnut chart and pie chart.

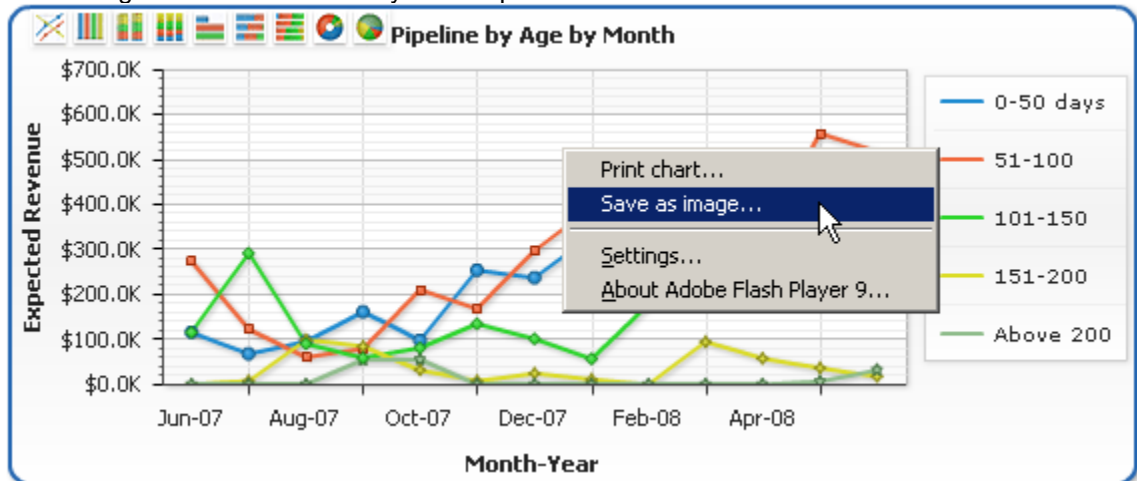
Note: Double click on chart icon to change chart type instead of single click.



5. **Printing Chart:** Right click on chart and select "Print chart..." option from menu.



- 6. Save Chart as Image:** You can save chart as image to include it in presentations or other documents. Right click on chart and select “Save as Image...” option from menu. Save the generated PNG file on your computer.



Using Reports


1. **Selecting a row:** Hover over and click on any row to select it.

Pipeline by Age Transactions				
Age Group	Age	Stage	Days Remaining	Days to Close
51-100	51	Perception Analysis	470	521
51-100	51	Value Proposition	458	509
51-100	51	Perception Analysis	349	400
51-100	52	Perception Analysis	261	313
51-100	52	Perception Analysis	352	404
51-100	55	Needs Analysis	250	305

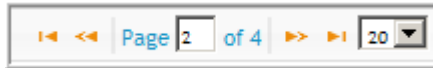
2. **Sorting Data:** Click on any column heading to sort it in ascending order. Click it again to sort in descending order.

Pipeline by Age Transactions				
Age Group	Age	Stage	Days Remaining	Days to Close
51-100	51	Perception Analysis	470	521
51-100	51	Value Proposition	458	509
51-100	51	Perception Analysis	349	400
51-100	52	Perception Analysis	261	313
51-100	52	Perception Analysis	352	404
51-100	55	Needs Analysis	250	305

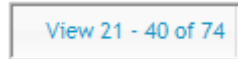
Up or down arrow is highlighted next to column heading for ascending or descending sort order respectively.

Pipeline by Age Transactions				
Age Group	Age 	Stage	Days Remaining	Days to Close
51-100	51	Perception Analysis	470	521
51-100	51	Value Proposition	458	509
51-100	51	Perception Analysis	349	400
51-100	52	Perception Analysis	261	313
51-100	52	Perception Analysis	352	404
51-100	55	Needs Analysis	250	305

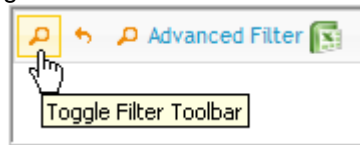
3. **Pagination:** Use pagination toolbar at the bottom center of the report to go to first, previous, next or last page. Use drop-down box to change number of rows on each page (default is 20 rows).



First and last row number of current page is displayed at bottom right corner. It also displays total number of rows e.g. following screenshot means that you are viewing row number 21 to 40 on current page out of total 74 rows.



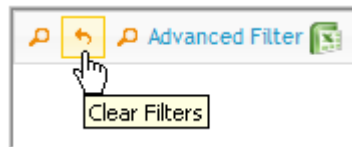
4. **Filtering or Slice & Dicing Data:** Click on “Toggle Filter Toolbar” icon at the bottom left corner to show or hide filtering toolbar.



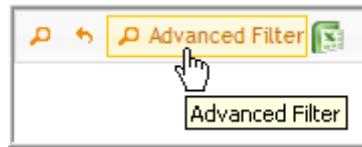
When you click on “Toggle Filter Toolbar” icon, it will show/hide drop-down boxes or input cells below each column headings. Select any value under drop-down boxes or enter value in input cells to filter and reload the data.

Pipeline by Age Transactions				
Age Group	Age	Stage	Days Remaining	Days to Close
All	99	All		
51-100	99	Qualification	491	590
51-100	99	Perception Analysis	1,050	1,149
51-100	99	Proposal/Price Quote	932	1,031

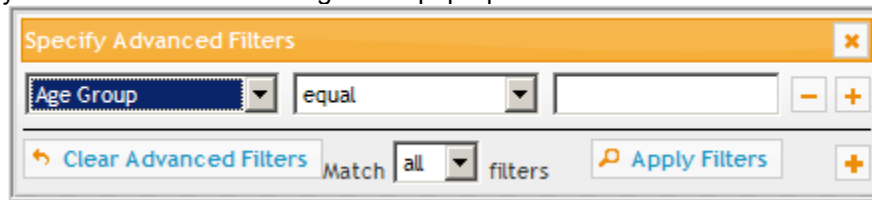
Click on “Clear Filters” icon on bottom left corner to clear all filters.



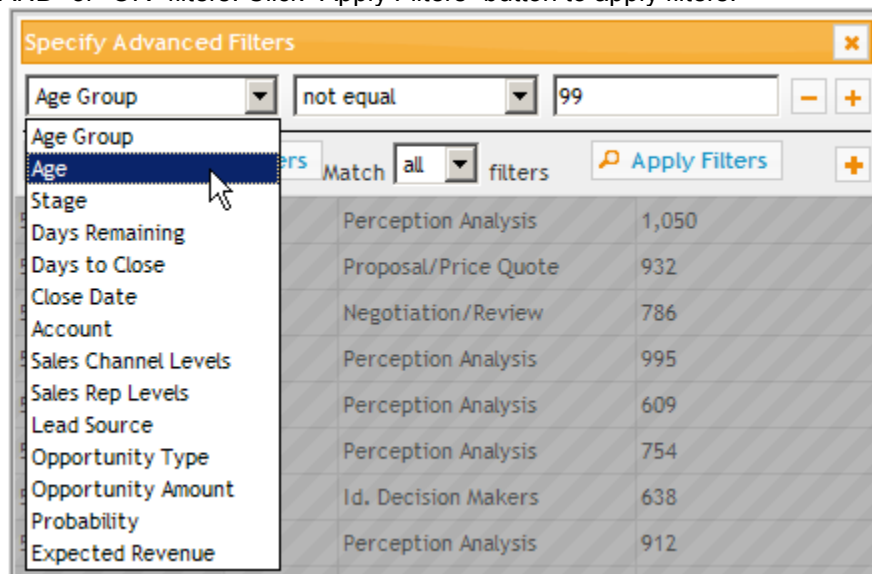
5. **Advanced Filtering:** Click on “Advanced Filter” button at bottom left corner to apply advanced filters. You can also use simple filters as explained above and advanced filters together in any order.



When you click on “Advanced Filter” button it will open a small pop-up window on top left corner. You can drag this window to any location you prefer by dragging & dropping “Specify Advanced Filters” heading of this pop-up window.



Select a column name from drop-down box, select an operator and enter value in input cell. Use plus or minus sign to add or remove additional filters. If you are using multiple advanced filters then select “Match all filters” or “Match any filters” to match all or any filters respectively (“Match all filters” is selected by default); this functionality is similar to using “AND” or “OR” filters. Click “Apply Filters” button to apply filters.

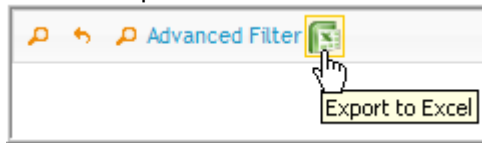


Report will be active again after applying the advanced filters. You can use other functionalities of the report while advanced filters pop-up window is open.

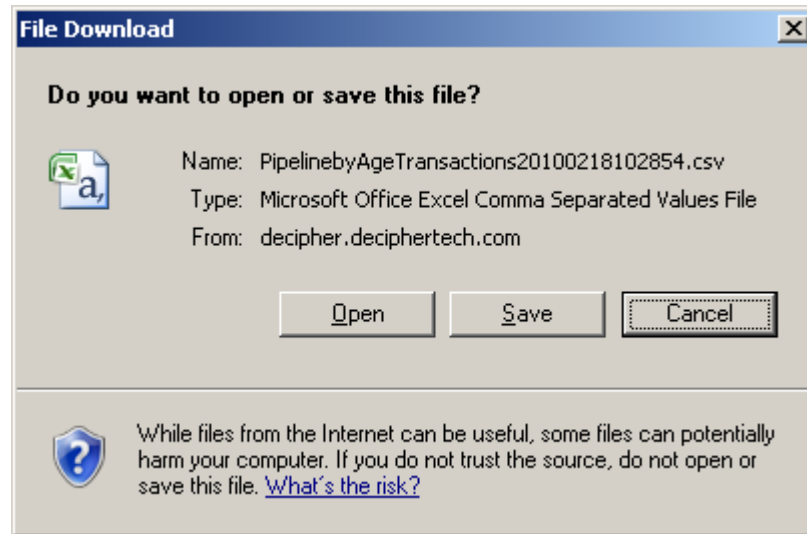
Use “Clear Advanced Filters” button to clear advanced filters; **this will not clear simple filters explained above.**

You can close advanced filters pop-up window by click on cross icon on top right corner. If you added any advanced filters and closed the pop-up window then filters will remain as is. You can view the filters again by clicking on “Advanced Filter” button.

6. **Export Data to Excel:** Click on “Export to Excel” icon at bottom right corner.



Depending upon your browser settings, you may get following window to either Open or Save excel file. If you do not get following window then it will automatically open excel file.



7. **Changing Column Order:** Drag & drop column heading to change the order of columns.

Pipeline by Age Transactions				
Age Group	Age	Stage	Days Remaining	Days to Close
51-100	51	Perception Analysis	470	521
51-100	51	Value Proposition	458	509
51-100	51	Perception Analysis	349	400

8. **Changing Column Size:** Drag & drop line next to column heading to change the column size.

Pipeline by Age Transactions				
Age Group	Age	Stage	Days Remaining	Days to Close
51-100	51	Perception Analysis	470	521
51-100	51	Value Proposition	458	509
51-100	51	Perception Analysis	349	400