

Networkabl App - How-To Guide

About

This guide is designed to support the user navigating through the Networkabl application, showcasing how the user can create records.

NB: This guide is tailored towards Salesforce Lightning Experience.

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Support

Please contact us hello@insightablapps.com for any support questions or issues.

Community Network

What is the Community Network?

The Community Network represents two main elements:

- The parties or Account records involved in an Opportunity which influence your strike rate percentage vs your competitor
- The relationship between each party or Account record involved in an Opportunity which is used to display how often each party works together and on what Opportunities

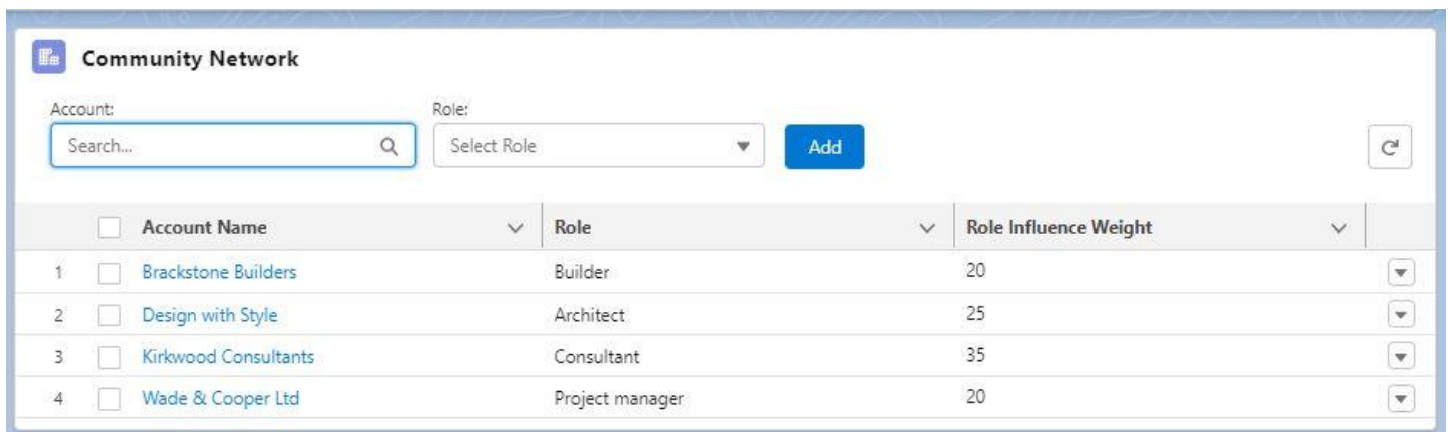
How do I create a Community Network?

Community Network records get created in two ways:

1. Automatically when adding a role to the network of an Opportunity
2. Automatically on close of an Opportunity to establish relationships between each Account role

Automatically when adding a role to the network of an Opportunity

Accounts are added to the Community Network of an Opportunity with a defined role.



	☐ Account Name	Role	Role Influence Weight	
1	☐ Brackstone Builders	Builder	20	▼
2	☐ Design with Style	Architect	25	▼
3	☐ Kirkwood Consultants	Consultant	35	▼
4	☐ Wade & Cooper Ltd	Project manager	20	▼

NB:

- The same Account cannot be added twice to the Community Network of the same Opportunity
- The same role cannot be added twice to the Community Network of the same Opportunity
- The sum of all role influence weights cannot exceed 100%

Automatically on close of an Opportunity to establish relationships between each Account role

On close of an Opportunity, the existing Community Network records are updated to be matched with a Community Account role, and additional Community Network records are created for the other possible relationship matches.

A record will be created for each possible relationship combination of Account roles in the Community Network. For example:

Primary Account	Primary Account Role	Community Account	Community Account Role
Acme	Builder	Burlington Textiles	Architect
Acme	Builder	Universal Studio	Project Manager
Burlington Textiles	Architect	Acme	Builder
Burlington Textiles	Architect	Universal Studio	Project Manager
Universal Studio	Project Manager	Acme	Builder
Universal Studio	Project Manager	Burlington Textiles	Architect

Community Network Page


Community Network
CN-000000014

[Edit](#)
[Delete](#)

Opportunity
[TestOppWon](#)

Primary Account
[Builder](#)

Primary Account Role
Builder

Primary Account Role Influence Weight
20%

Community Account
[Architect](#)

Details

Primary Account Builder	Community Account Architect
Primary Account Role Builder	Community Role Architect
Primary Account Role Influence Weight ⓘ 20%	

Opportunity Details

Opportunity TestOppWon	Opportunity Stage Closed Won
Winning Supplier ⓘ INSIGHTabl	Opportunity Amount \$2,000,000.00

> System Information

Related


Community Network History (3+)

Date: 1/12/2022, 1:16 pm
Field: Community Account
User: [User User](#)
Original Value:
New Value: Architect

Date: 1/12/2022, 1:16 pm
Field: Winning Supplier
User: [User User](#)
Original Value:
New Value: INSIGHTabl

[View All](#)

Opportunity Competitor

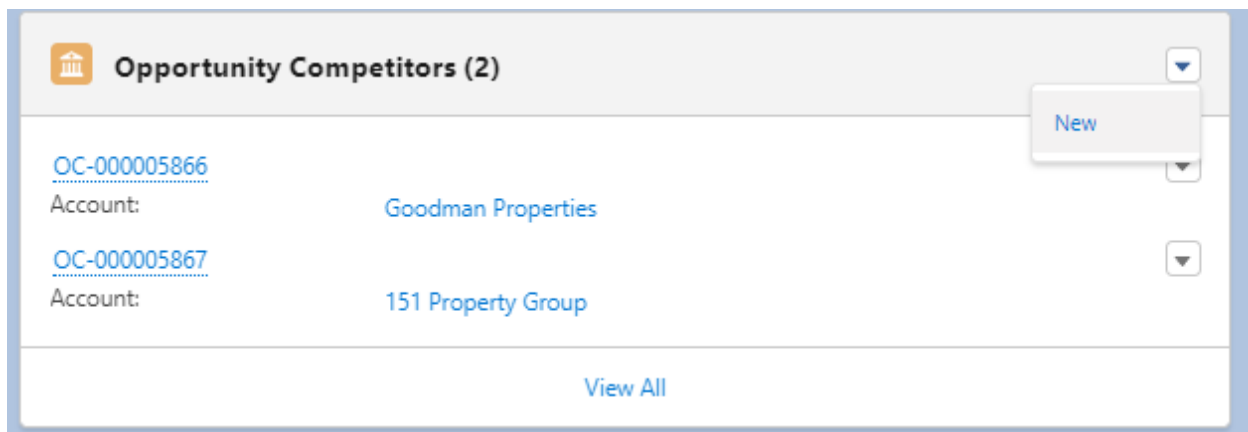
What is an Opportunity Competitor?

Opportunity Competitors represent nominated Account records that are competitors to the Opportunity. One or more competitors can be created for a single Opportunity which can then be used to analyze their winning percentage chance against your own.

How do I create a Opportunity Competitor?

There are two ways to create Opportunity Competitors:

1. Using the standard “New” record creation button on the Opportunity Competitor related list on the opportunity page



2. Selecting an Opportunity Competitor to compare in the Competitor Analysis component

Our Strike Rate

39%

Competitors Strike Rate

92%

Low
Medium
High

Add / Select Competitor

Grand... ×

BUILDER

ABC Building Constructions		Grand Construction Corp	
Strike Rate 40%		Strike Rate 90%	
Won	8	Won	12
Lost	12	Lost	1
No Bid	5	No Bid	1
Strike Rate 40%		Strike Rate 90%	
Abandoned1		Abandoned0	
Participated38		Participated15	
Open	12	Open	1

+

ARCHITECT

ABC Building Constructions		Grand Construction Corp	
Strike Rate 42%		Strike Rate 89%	
Won	8	Won	11
Lost	11	Lost	1
No Bid	5	No Bid	1
Strike Rate 42%		Strike Rate 89%	
Abandoned2		Abandoned0	
Participated37		Participated14	
Open	11	Open	1

CONSULTANT

PROJECT MANAGER

Opportunity Competitor Page

The Opportunity Competitor page showcases the connection between the Competitor Account and the Opportunity. You also have the ability to upload relevant files.


Opportunity Competitor
OC-000005866

[Edit](#)
[Delete](#)

Opportunity
[ATS Building Products - Warehouse](#)

Account
[Goodman Properties](#)

Created By
 [Michael Dempster](#), 10/10/2022, 8:46 am

Last Modified By
 [Michael Dempster](#), 10/10/2022, 8:46 am

Details

Account
[Goodman Properties](#)

Opportunity
[ATS Building Products - Warehouse](#)

[System Information](#)

Related


Files (0)
[Add Files](#)

[Upload Files](#)

Or drop files


Opportunity Competitor History (1)




1 Item • Sorted by Date • Updated a few seconds ago

	Date	Field	User	Original Va...	New Value
1	10/10/2022, 8:46 am	Created.	Michael Dempster		

[View All](#)

Account Roll Up Summary

A number of summary fields are available to be added to your Account page layout. They are designed to provide a summary of Opportunity data based on the Account's involvement in the Community Network of an Opportunity. Values included are:

- **Open** - Roll-up of the number of open (stage=any value with open type) Opportunities the Account is involved in according to the Community Network records
- **Won** - Roll-up of the number of won (stage=Closed Won) Opportunities the Account is involved in according to the Community Network records
- **Lost** - Roll-up of the number of lost (stage=Closed Lost) Opportunities the Account is involved in according to the Community Network records
- **No Bid** - Roll-up of the number of no bid (No Bid=true) Opportunities the Account is involved in according to the Community Network records
- **Abandoned** - Roll-up of the number of abandoned (Abandoned=true) Opportunities the Account is involved in according to the Community Network records
- **Relationships** - Roll-up of the number of the related Community Network records
- **Strike Rate** - Formula = $\text{Won} / (\text{Lost} + \text{Won})$ of Opportunity records the Account is involved in according to the Community Network records. Includes No Bid Opps as "Lost" if included as part of configuration settings
- **Open Value** - Roll-up of the values of Amount field of open (stage=any value with open type) Opportunities the Account is involved in according to the Community Network records
- **Won Value** - Roll-up of the values of Amount field of won (stage=Closed Won) Opportunities the Account is involved in according to the Community Network records
- **Lost Value** - Roll-up of the values of Amount field of lost (stage=Closed Lost) Opportunities the Account is involved in according to the Community Network records
- **No Bid Value** - Roll-up of the values of Amount field of no bid (No Bid=true) Opportunities the Account is involved in according to the Community Network records
- **Abandoned** - Roll-up of the values of Amount field of abandoned (Abandoned=true) Opportunities the Account is involved in according to the Community Network records
- **Relationship Value** - Roll-up of the values of Amount field of all Opportunities the Account is involved in according to the Community Network records
- **Average Won Value** - Average Closed Won Opportunity amount value of all Accounts with Community Network records

▼ Opportunity Network Summary

Open ⓘ	25		Open Value ⓘ	\$12,772,000.00	
Won ⓘ	22		Won Value ⓘ	\$16,859,000.00	
Lost ⓘ	24		Lost Value ⓘ	\$14,688,000.00	
No Bid ⓘ	9		No Bid Value ⓘ	\$3,280,000.00	
Abandoned	8		Abandoned Value	\$7,255,000.00	
Relationship Value ⓘ	\$54,854,000.00		Relationship Value ⓘ	\$54,854,000.00	
Strike Rate ⓘ	47.83%		Average Won Value ⓘ	\$766,318.18	

▼ Opportunity Network Hierarchy Summary

Open in Hierarchy ⓘ	23		Open Value in Hierarchy ⓘ	\$12,073,000.00	
Won in Hierarchy ⓘ	16		Won Value in Hierarchy ⓘ	\$8,045,000.00	
Lost in Hierarchy ⓘ	24		Lost Value in Hierarchy ⓘ	\$10,816,000.00	
No Bid in Hierarchy ⓘ	10		No Bid Value in Hierarchy ⓘ	\$4,191,000.00	
Abandoned in Hierarchy	8		Abandoned Value in Hierarchy	\$7,255,000.00	
Relationships in Hierarchy ⓘ	169		Relationship Value in Hierarchy ⓘ	\$42,380,000.00	
Strike Rate in Hierarchy ⓘ	40.00%		Average Won Value in Hierarchy ⓘ	\$502,812.50	

The same set of summary fields are provided at a hierarchy level which utilizes the standard Parent Account hierarchy field. Hierarchy fields are a sum of all child Account summary fields defined above. The hierarchy summary rolls up a maximum of five levels, after which the values no longer roll up.

Reports

A series of standard Salesforce reports are included in the package to illustrate Community Network relationship involvement. These report charts are designed to be displayed and filtered on the Account page. See the installation guide for more details on how to set this up.

The reports cover the following areas:

- **Network Related Opportunities Open** - All Community Network records against open Opportunities filtered by the primary Account (when viewed on the Account page)
- **Network Related Opportunities Won** - All Community Network records against won Opportunities filtered by the primary Account (when viewed on the Account page)
- **Network Related Opportunities Lost** - All Community Network records against lost Opportunities filtered by the primary Account (when viewed on the Account page)
- **Network Relationship Count** - Count of all Community Network records the primary account belongs to (when viewed on the Account page)
- **Network Relationship Amount** - Opportunity amount related to Community Network records the primary account belongs to (when viewed on the Account page)
- **Network Relationships Grouped by Role** - Shows the number of relationships between the primary account and other community accounts where they were in the same Community Network for the same Opportunity. Portrays who has worked with who.

Reports are located inside the Networkabl Reports folder.