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USER MANUAL

SET UP YOUR DELPHI

Welcome, Salesforce Administrators & Users

This guide contains the details you need to setup & maintain Delphi in your Salesforce Organization.

We hope this guide provides you the complete content you need to get Delphi up and running with salesforce. If you need any further assistance, feel free to contact the support team at Mirketa.

Understanding how Delphi Works

Delphi intuitively uses collective organizational knowledge to analyze and predict forecasted values of opportunities using its proprietary engine based on Monte Carlo simulation. The complex algorithms predict when an opportunity in your pipeline will convert into an order and forecast's the value of your Accounts and Sales Reps.

Based on the selection of module by the user between "User Defined" & "Machine Learning", during simulation through our proprietary algorithm for User Defined values, every opportunity goes through ten thousand iterations by selecting randomly generated completion time and probability based on the configurable ranges defined by you. For the machine learning module, Delphi uses historical data in the salesforce org to determine historical trends based on which it calculated the forecasted values.

Delphi predicts the expected time of completion of the opportunity and the expected revenue from the opportunity with the confidence level with which user wants to look at. As each opportunity goes through so many iterations, the chances of deviation become minimal and the expected result extremely accurate.

For Salesforce Administrators

Installing Delphi

Admins can **install** Delphi package from the AppExchange in their salesforce organization.

1. Before installing Delphi, make sure to check the following:
Go to setup -> Opportunity fields -> Set History tracking -> Check on 'Stage' -> Save
2. While installing Delphi from the AppExchange, the first screen asks you to choose from:
 - Install for admins only
 - Install for all users
 - Install for specific profiles
3. **Choose** the option as per your need of the Application.
4. Click **install**
5. Wait for the application to get installed and then click **done**.

Uninstalling Delphi

Admins can **uninstall** Delphi package from their Salesforce Org.

1. From the Setup page, enter 'Installed Packages' in the Quick Find box and select Installed Packages.
2. Click on the '**uninstall**' link adjacent to the Delphi package to remove the package and all its components from your Salesforce organization.

Configuring your Delphi

After installing Delphi, the first screen you see is the 'Delphi Configuration' - How to configure screen.

User can choose to configure Delphi between two available modules:


- **User Defined** - User manually inputs the minimum and maximum probability & time for each stage in which an opportunity should be converted.
- **Machine Learning** - User just tells Delphi the time period for which their organization data needs to be analysed for.



Note: Delphi configuration is by default accessible only to the Admin profiles. If you want to give Delphi Configuration access to other profiles as well, you'll have to clone that profile and check 'Customize Application' in that profile.

User Defined –

1. Click on **Configure** to start configuring your Delphi for User defined values.



Accurate Sales Forecasting & Predictive Analytics

Delphi intuitively uses complex simulations to analyze and predict when an opportunity in your pipeline will convert into an order, to forecast value of your Opportunities, Accounts and Sales Reps. You can choose a confidence level for a specific time period to forecast the expected closure time and expected revenue.

Delphi empowers you to decide how you want your salesforce organization data to be analyzed.

User defined – User manually inputs the minimum and maximum time & probability for each stage in which an opportunity should be converted.

Machine Learning – User just tells Delphi the time period for which their organization data needs to be analyzed for.

User defined

How to Configure
You can configure your application in just 2 simple steps

STEP 1

For every stage provide the expected minimum and maximum opportunity conversion time.

STEP 2

For every stage provide the expected minimum and maximum probability of opportunity conversion.

CONFIGURE

Note: Delphi automatically pulls the opportunity stages as defined in your salesforce org. You cannot **add** or **delete** any stage on the Delphi configuration page.

Machine Learning

How to Configure
You can configure your application for Machine Learning in just 1 simple step

Choose the time period for which you want your salesforce organization data to be analyzed for and let Delphi do all the heavy lifting for you.

CONFIGURE

Note: Machine learning works only if the number of Closed Won Opportunities in your Salesforce Org. is greater than 200.


2. On the next page click on **edit**
3. You'll see the editable fields of minimum and maximum values for 'Time to closure' and 'Probability of conversion'.

Configure the minimum and maximum time required for opportunities in any stage to get converted. Also define the minimum and maximum probability of conversion for the opportunity in every stage.



TIME TO CLOSURE ?			PROBABILITY OF CONVERSION ?		
Stage	Min Time (in days)	Max Time (in days)	Stage	Min Prob.	Max Prob.
Prospecting	300	999	Prospecting	0.20	0.30
Qualification	949	950	Qualification	0.20	0.40
Needs Analysis	430	940	Needs Analysis	0.30	0.50
Value Proposition	420	900	Value Proposition	0.40	0.60
Perception Analysis	400	910	Perception Analysis	0.10	0.20
Proposal/Price Quote	390	800	Proposal/Price Quote	0.70	0.85
Negotiation/Review	380	900	Negotiation/Review	0.75	0.99

4. After editing the list click on **save**.
5. On clicking save, Delphi will do the calculations on the backend, users cannot edit anything or see any output graphs until all the calculations are done.

 **Note:** The stages you see in the 'Time to closure' and 'Probability of conversion' are in accordance to your salesforce organization opportunity stages.

- Delphi works on the opportunities in your org.
- It automatically picks up the standard as well as the custom-made stages of your salesforce org.
- Delphi does not take into consideration the opportunities in Close won or Close lost stages.
- Each of the fields of both the tables are mandatory fields.
- The fields in the 'Time to closure' can take positive integer values only (in days). Numerals up to 3 digits are allowed in this field.
- The fields in the 'Probability of Conversion' can take only decimal values.
- After entering the values in both the tables when the user clicks on save, Delphi generally takes some time for its background calculations, after which Delphi is ready to show the graphs accordingly.

Machine Learning -

1. Click on **Configure** to start configuring your Delphi for Machine Learning module.
2. You'll see a popup, with a drop down list of values for time period selection. Select a time period for which you want your Org data to be analysed for.
Ex: - If you select 'last 6 months' from the drop down menu, Delphi will analyse the org data for the last 6 months starting today.
3. Click on '**submit**'.
4. On clicking submit, Delphi will do the calculations on the backend, users cannot edit anything or see any output graphs until all the calculations are done.

 **Note:**

- When the user installs Delphi for the very first time in the salesforce org, the data of the whole org is analysed for the machine learning module, which could take some time.
- The Admin configuring Delphi will get a notification mail whenever Delphi finishes the calculations.

Once the Admin installs and configures Delphi, its ready for the salesforce org users.

1. The User selects Delphi from the application dropdown menu.
2. User can then click on the **Delphi** tab to see the '**Delphi Graphs**' - How to use screen
3. Click on **Get Started** to see the dashboard
4. You can see five different graphs on your Delphi Dashboard namely:
 - Revenue Forecast
 - Top 20 Opportunities
 - Top 10 Accounts
 - Bottom 10 Accounts
 - Top 10 performers




Note: The users can see all the forecast reports on the same page by selecting individual options for different graphs.

- The user can choose the '**Confidence Interval**' from the 3 available selections i.e. (68%, 95%, 99%). This percentage is by how much confidence do you need your output to be. More confidence level means that you are willing to take less risk (in turn less return), in which case the output will always be less than when you select a lesser confidence interval, which means you are willing to take high risk (in turn high return).
- The user can choose the '**Time Period**' from the 2 available selections i.e. (12 Months, 24 Months). This time period is the time for which you want your output to be, **starting from the current/present month**. Selecting 12 months ensures that the output the graphs are showing is for the 12 months' period (starting month is the current/present month). Similar is the case with 24 months' period.
- In the output, Delphi shows only the opportunities having some positive forecasted revenue (i.e. Delphi does not show the opportunities having zero expected revenue in its output)

Understanding the bar charts

The Delphi Dashboard shows 5 different bar charts, which shows a projection of what the business is going to offer based on the current numbers (opportunity amount) in their salesforce organization.

 **Note:** Delphi Forecasts are accessible to everyone irrespective of the user profile.

Revenue Forecast



Based on the values of 'Confidence Level' and 'Time Period' selected by the user the **Revenue Forecast** graph shows the aggregated summation value of all the opportunities that are going to be completed for the selected time period (shown month wise).

i.e. if a user has selected 68% confidence level and time period as 12 months, the Revenue forecast graph will show the opportunities (month wise) that are going to be completed in the next 12-month period.

User can hover over a bar to see the aggregated value of all the opportunities going to be completed in a month.

User can click on a bar to see a popup showing all the opportunities corresponding to that bar in the chart.

User can also **export** all the data in an excel (as shown) and save it for their use.

The exported data in excel shows Opportunity name, Current Stage, Owner Name, Expected Conversion Month & Expected Revenue.

A	B	C	D	E
Opportunity Name	Current Stage	Owner Name	Expected Conversion Month	Expected Revenue
Opp 1	Value Proposition	Delphi Mirketa	17-Nov	10116.3
Opp 16	Proposal/Price Quote	User Demo	17-Nov	195173.5
Opp 6	Value Proposition	User Demo	17-Nov	60365.91
Opp 2	Proposal/Price Quote	User Demo	17-Nov	113536.23

Top 20 Opportunities



The **Top 20 Opportunities** graph shows the top 20 opportunities that are going to be completed for the selected time period.

In this graph, user have the option of selecting the time period as individual month wise, 12 months & 24 months.

User can hover over a bar to see the opportunities details that are going to be completed in the selected time period.

User can also **export** all the data in an excel and save it for their use.

The exported data in excel shows **Opportunity name**, **Current Stage**, **Owner Name** & **Expected Revenue**.

A	B	C	D
Opportunity Name	Current Stage	Owner name	Expected Revenue
Opp 17	Proposal/Price Quote	User Demo	\$224,286.29
Opp 16	Proposal/Price Quote	User Demo	\$195,173.50
Opp 3	Value Proposition	Delphi Mirketa	\$169,014.06
Opp 2	Proposal/Price Quote	User Demo	\$113,536.23
Opp 10	Value Proposition	User Demo	\$111,585.20

Top 10 Accounts

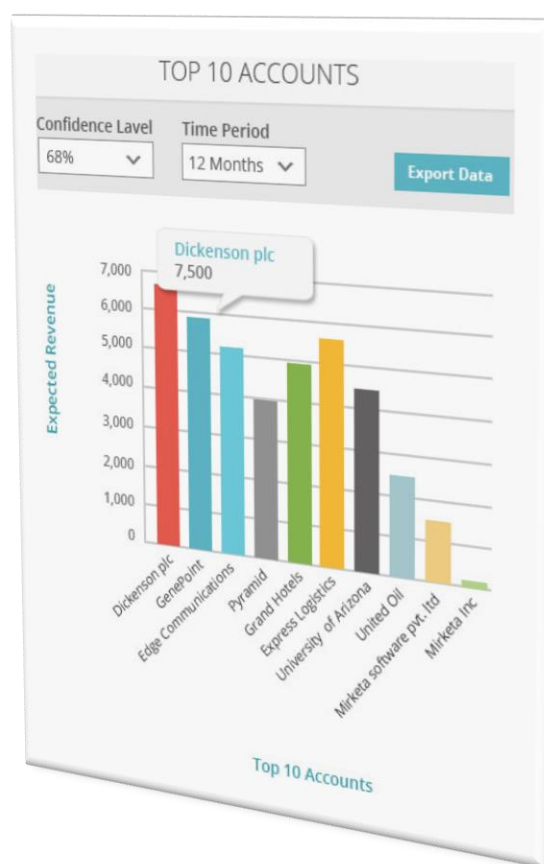
Top 10 Accounts graph shows the forecasted value of top 10 accounts by aggregating all the opportunities corresponding to the accounts.

User can hover over a bar to see the name & aggregated value of the account.

User can also **export** all the data in an excel and save it for their use.

The exported data in excel shows [Account Name & Expected Revenue](#).

A	B
Account Name	Expected Revenue
Account 2	\$431,463.18
Account 1	\$265,655.71
Account 3	\$177,565.91



Bottom 10 Accounts

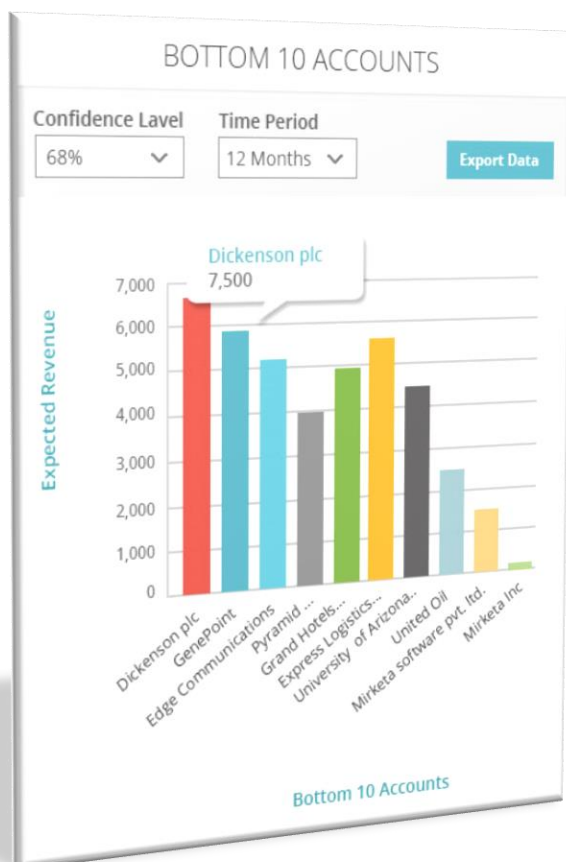
Bottom 10 Accounts graph shows the forecasted value of bottom 10 accounts by aggregating all the opportunities corresponding to those bottom 10 accounts.


User can hover over a bar to see the name & aggregated value of the account.

User can also **export** all the data in an excel and save it for their use.

The exported data in excel shows [Account Name & Expected Revenue](#).

A	B
Account Name	Expected Revenue
Account 4	\$36,322.05
Account 5	\$152,498.84
Account 3	\$177,565.91



 **Note:** The bottom 10 Accounts graph doesn't take into consideration the Accounts which are having or are going to have zero forecasted revenue. It shows the bottom 10 accounts having forecasted revenues greater than zero.

Top 10 Performers

Top 10 Performers shows the top 10 sales representatives which are likely to generate maximum sales revenue as per the algorithm.

User can hover over a bar to see the name of the sales representative & the aggregated values of the opportunities related to that sales rep.

User can also **export** all the data in an excel and save it for their use.

The exported data in excel shows **Owner Name & Expected Revenue**.

A	B
Owner Name	Expected Revenue
User Demo	\$790,734.67
Delphi Mirketa	\$272,771.02

