User Guide

Southern Destination Salesforce.com Training

Contents

Contents 2
Module 1: Access & Navigation 4
Module 2: Campaigns 24
Module 3: Lead Management 32
Module 3: Account Management 48
Module 4: Managing Opportunities 60
Module 5: Managing Activities 66

Module 1:
Access and Navigation

Module 1: Access & Navigation

Objectives

By the end of this module, you should be able to:

- Access and log in to salesforce.com
- Understand salesforce terminology
- Use common internet techniques to navigate within salesforce.com
- Use the Global Search and Tabs to search for data
- Read and edit a typical record

First Time Access - Logging in from Email

To ensure access to salesforce.com is secure, all users must have a User Name and Password to log in. You will be sent your login details in an email from your System Administrator. Within the email is a link containing your User name and temporary password. Click on the link to go to the login page described above.

The first time you log in you will be asked to change the system generated password into one you can easily remember and based on the password policy settings. You will also need to answer a security question. This question will be used in the event you need to be reminded of your chosen password.

Password Policies

- Must be a minimum of 8 characters,
- Are case sensitive and must be alpha numeric.
- Will expire every 30 days
- 5 previous passwords will be remembered and cannot be reused
- 5 incorrect password attempts and you are locked out. You will need to call your salesforce.com administrator and they will reset you and also reset the password, allowing you to choose another value.

Subsequent Access

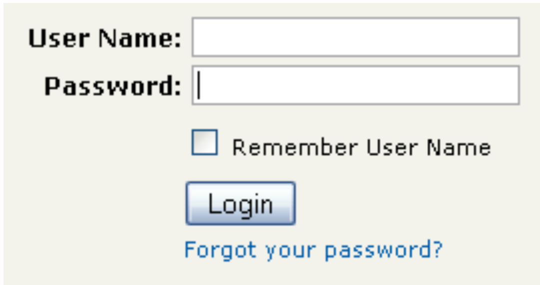
Because salesforce.com is completely on-demand, it is available anytime, anywhere from any internet browser, not just on any South Africa 365 computer.

The internet address to access the login page for salesforce.com is

https://login.salesforce.com/

It is recommended that you bookmark this address in your favourite's page of your browser.

Enter your user ID advised in the email above (normally your email address) and the new password you have chosen.



If you forget your password, click on the **Forgot your password?** link. You will be sent an email with a link which you must click to answer the security question you chose when creating your new password. When you answer correctly, you will be emailed another link which you must click to reset your password and re-gain access to salesforce.com.

To prevent someone else from accessing your salesforce.com application, do not check the **Remember User Name** option when you are logging in from another users computer. This is also recommended if you share your workstation with a colleague.

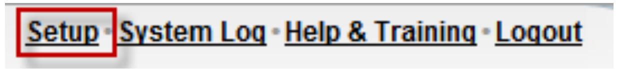
You can access salesforce.com from any computer that can access the internet (e.g. your home computer) but you will need access to your network through your VPN.

Changing Your Password

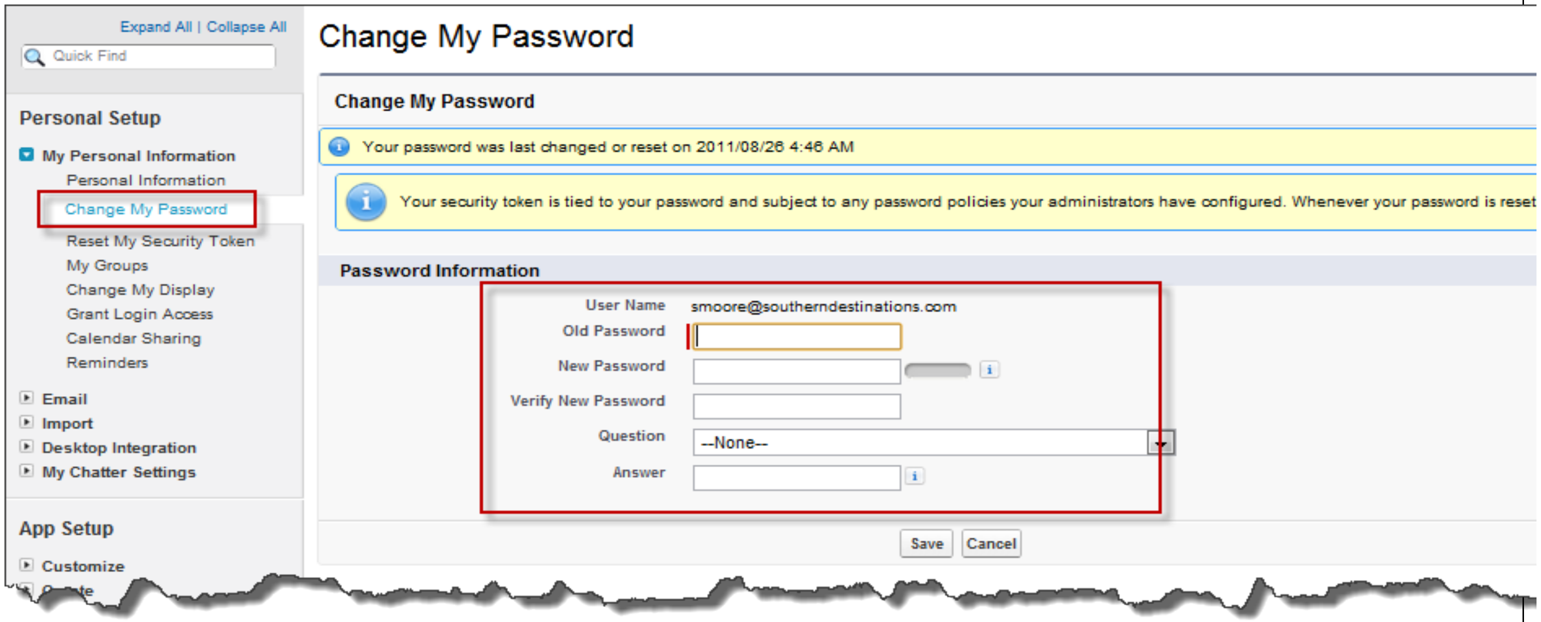
You can change your password at any time, especially if you believe your password has been compromised.

Best practice is to change your password on a monthly basis; you will be prompted for this to happen.

To change your password:

Step	Action
1	Click on **Setup** at the top of the page 
2	Expand the **My Personal Information** link and select **Change My Password**

<table>
<tr>
<td>3</td>
<td>Complete the form with all fields containing a value and then click on the Save button

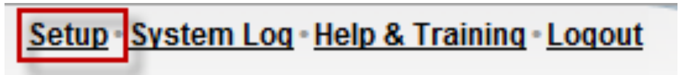
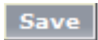
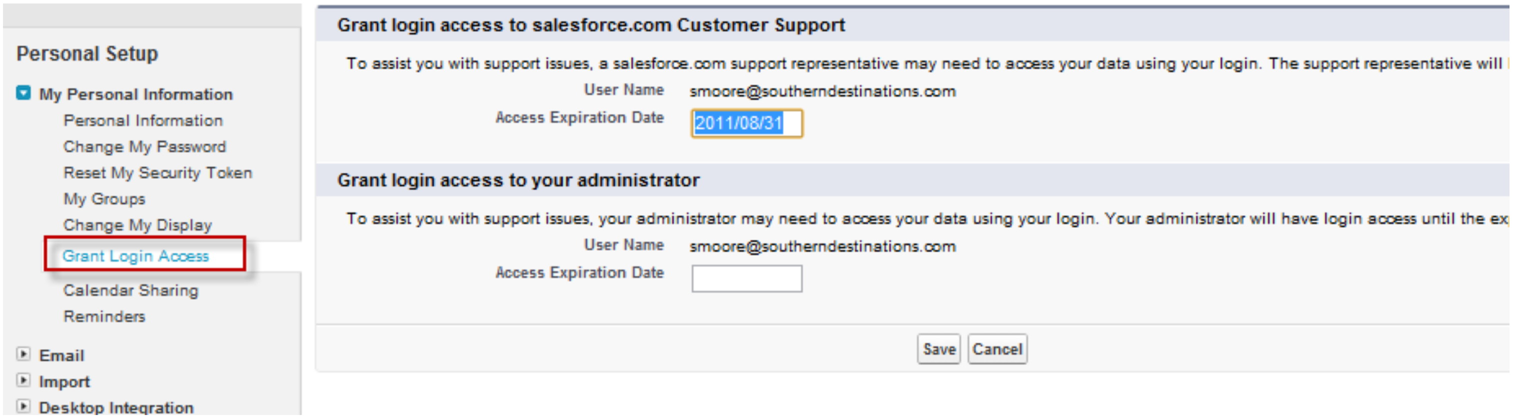


</td>
</tr>
</table>

Granting Admin Access

Once you have obtained access to the application it is recommended that you grant access to your system administrator. This feature allows the administrator to log in as you, so they see data from your perspective, without asking for your user id and password. **NOBODY** should ever need to ask for your password. Report anybody who requests user ID and password information immediately to the system administrator

To grant access:

Step	Action
1	Click on **Setup** at the top of the page 
2	Expand the **My Personal Information** link and select **Grant Login Access**
3	Complete the second box with a future date and then click on the button  

Salesforce Terminology

Icon	Tab	Definition
	Lead	**A Lead** is a potential customer that South Africa 365 wants to do business with
	Campaign	**A campaign** is an outbound marketing project that you want to plan, manage, and track within Salesforce.com. It can be a direct mail program, seminar, print advertisement, email, or other type of marketing initiative. You can organize campaigns into hierarchies for easy analysis of related marketing tactics.
	Person Account	A Person **Account** is an individual account, which is an organization or person involved with your business. South Africa 365 tracks End users, Resellers, Partner, Vendor, Media, Consultant and Influencer accounts.
	Opportunity	An **Opportunity** is used to capture quotes and manage the pipeline.
	Report	**Reports** are summaries and analyses of data, which you can display or print. The information you see in reports is only the data to which you have access.
	Dashboard	**Dashboards** give you a real-time snapshot of corporate metrics and key performance indicators. A dashboard is a group of different components that graphically display your custom report data.
	Activity	**Activities** are Tasks and Events that you can relate to your accounts, Accounts and Opportunities. This enables you to track all interaction with the customer and other members of the team.

Not all data is accessed through tabs.

Data held in the Account, Contact and Opportunity tabs are said to be in Objects.

Objects are linked to form a process. This user guide has been designed to demonstrate how to follow this process and create and edit occurrences of these objects. The diagram below shows the relationship between the objects.

The Object Relationship Diagram

Accessing Data

Security Model

Access to the data has been designed such that all **Accounts** and all their **Accounts** are Public Read/Write/Transfer so the data will be visible and editable to all users.
Users will not be able to create new opportunities, a lead will have to be converted in order for an opportunity to be created.

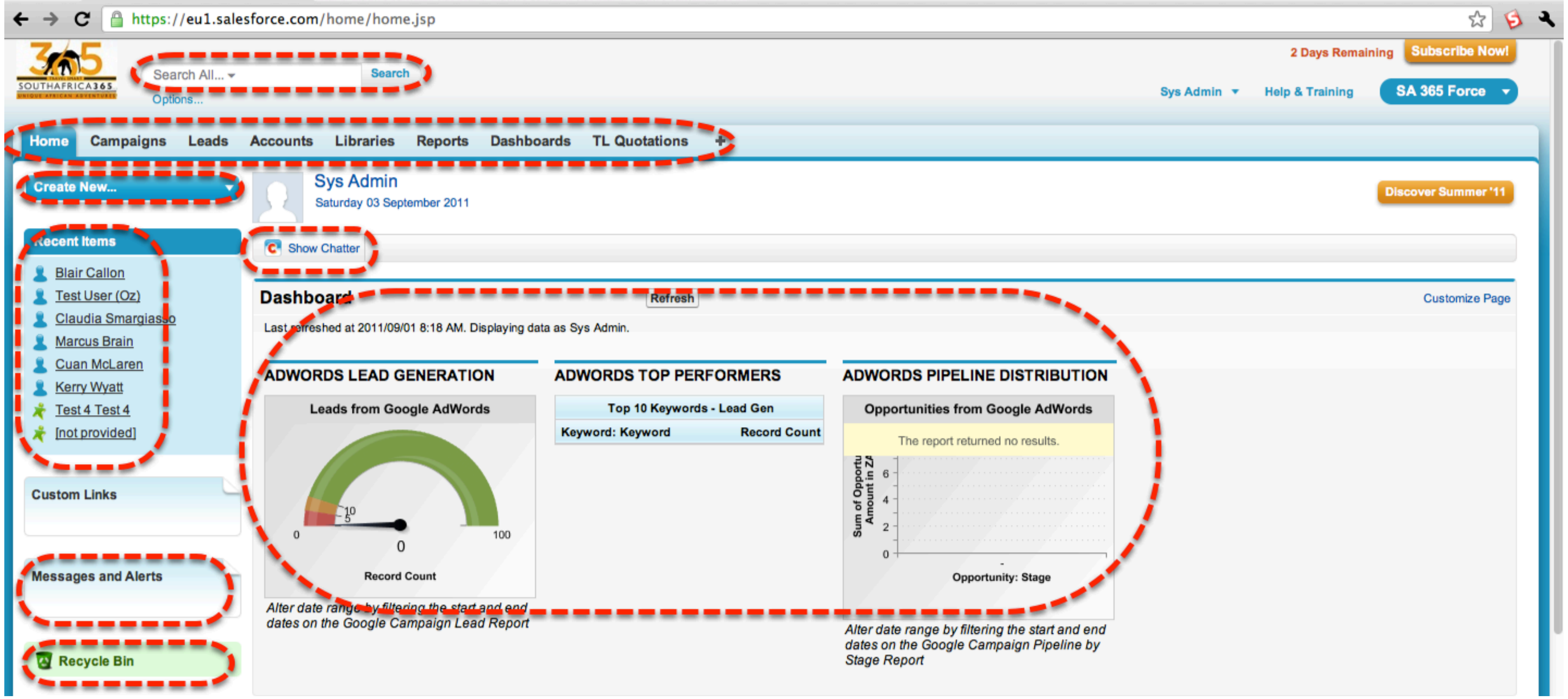
Navigating the Home Page

Navigating within salesforce.com is much the same as how you use other popular websites - point and click on links and buttons to access pages and information.
An underlined label is a link through to more information.

The Home Page

After logging into salesforce.com, you begin at the Home Page, where you can review and prioritise your activities for the day, access and enter information or jump to other areas by clicking on Tabs.

The **Home Page** comprises Sidebar, Calendar and Events, my tasks and dashboards



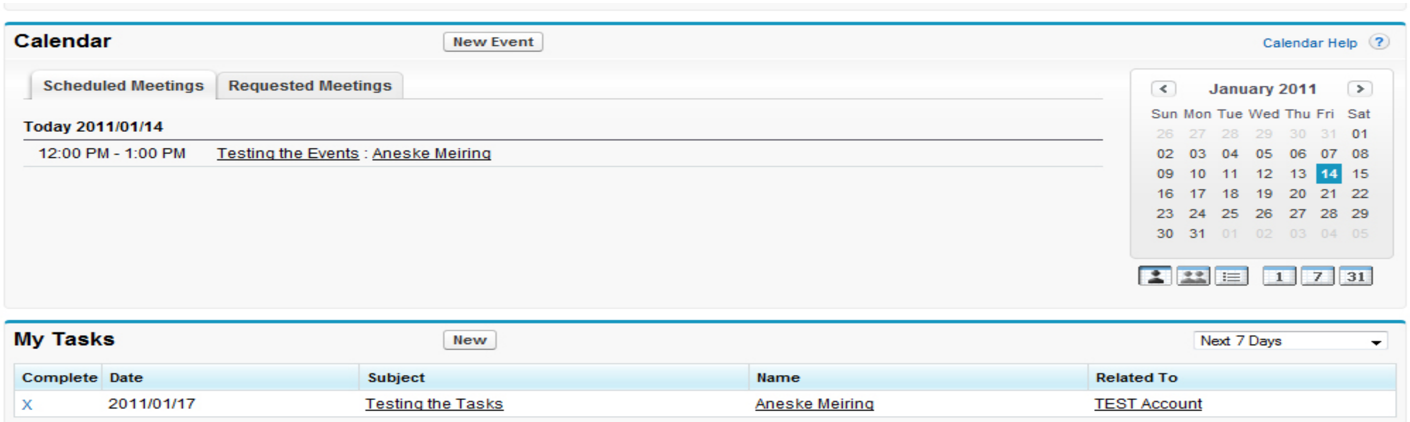
Tip - Click the Activities List View icon to easily track and manage your Tasks and Events across records all in one place.

Managing Events and Your Calendar

Events are Activities, such as meetings, telephone calls and appointments, which are scheduled for a specific date and time. The Events section of the Home Page (Figure 1) lists Events scheduled within the next seven days. Once the date of an Event is passed, the Event will drop off the Home Page. To see future Events beyond a week, click on the Calendar icon.

Managing Tasks

Tasks are to-do items with a due date, such as follow-up phone calls, assigned to yourself or another salesforce.com user. You can specify how Tasks are listed on the Home Page (Figure 1), such as a list of only Today's Tasks. Once a Task's status is changed to Complete, the Task drops off the Home Page



Notice that overdue Tasks remain on the Home Page but the date of the task is displayed in red

Navigating the Home Page

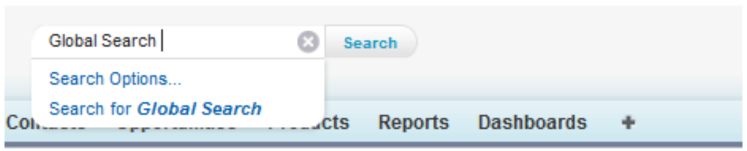
Global search functionality at the top of the page next to the logo.

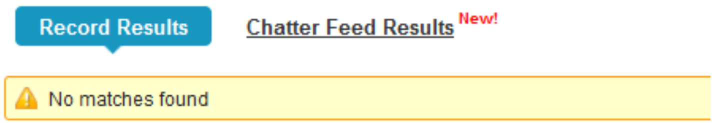
Search
Use Search to find record information and/or to check a record does not already exist in the database to avoid entering duplicates. Use:

- Basic Search – for records you and your Team have visibility on
- Advanced Search – using key words/criteria (covered later)

Basic Search
To effectively use the basic search tool, keep the following in mind:

- You can search for items you have the ability to view
- You can enter Broker or Individual identifiers here, e.g. Broker Number
- If your search string has multiple words, they are automatically treated as an exact phrase, not as separate words
- Searches are not case-sensitive
- Searches only look in a certain subset of fields



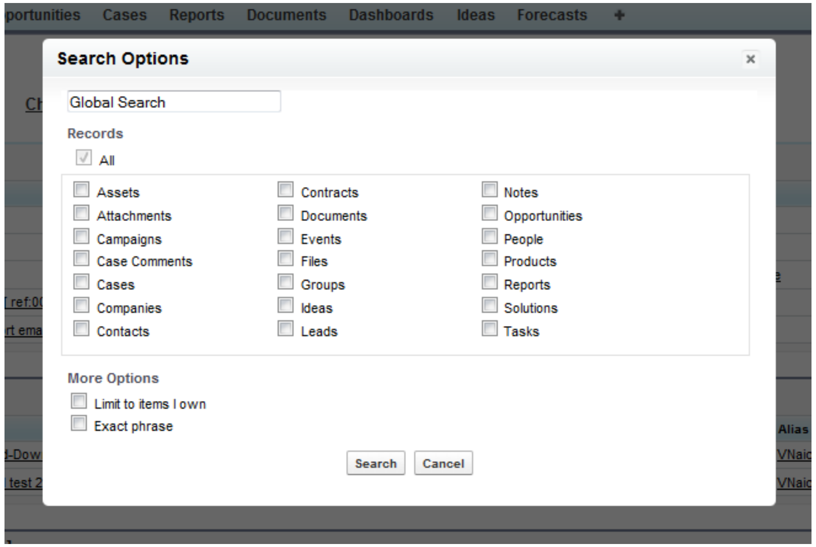


- **Search Tips**

Note: Wildcards (*) can be used to improve your search results, though a wildcard is already automatically appended to your search string to find any phrase that begins with your string.

Advanced Search

To effectively use the basic search tool, keep the following in mind:



Navigating the Home Page

Recent Items

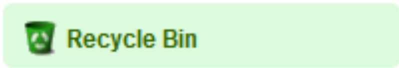
The Recent Items section of the sidebar displays a history of links to the last ten records, such as Accounts, Accounts, or Opportunities you edited, created or viewed. It will not show Activity, Report or Dashboard links.

Messages and Alerts

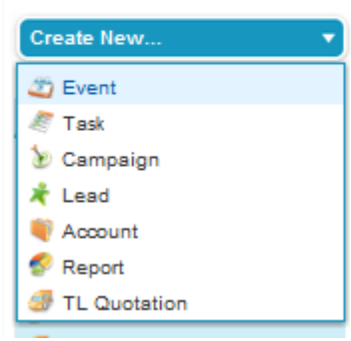
Occasionally the System Administrator will need to send out messages to all users, e.g. scheduled maintenance, changes to forms, etc. and these messages will be displayed in this part of the sidebar

Recycle Bin

The Recycle Bin link lets you view recently deleted records for 30 days before they are permanently deleted from the system.

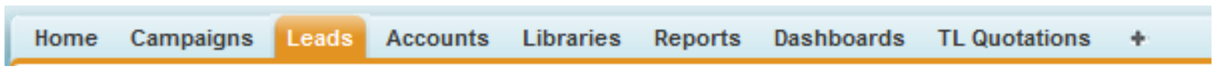


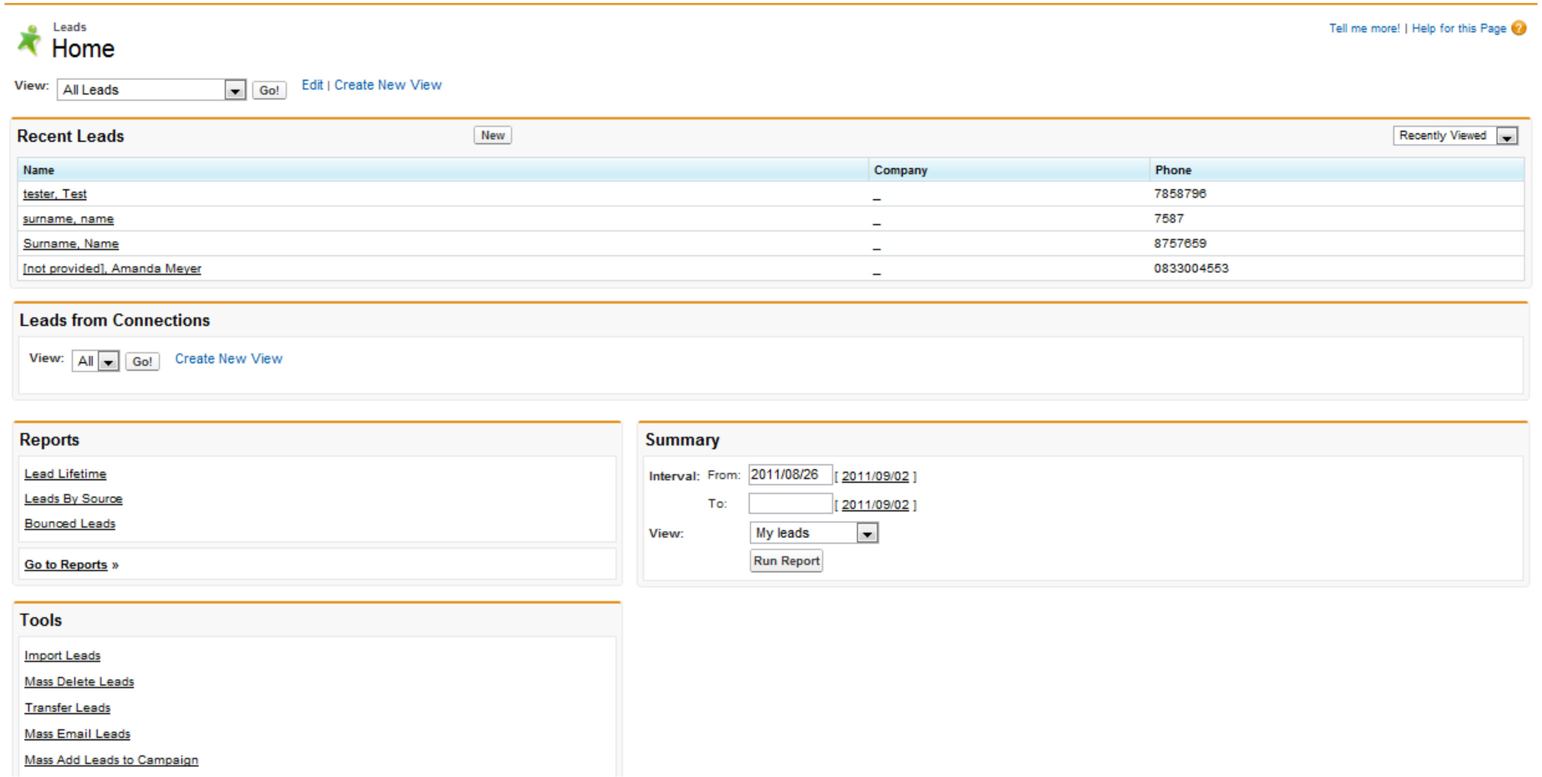
Shortcut Create New



Navigating the Tabs

Colour-coded tabs run across the top of any page. Click on a tab to access that tabs homepage where you will see Recent records for that tab, Views and tools for adding, editing, and reviewing record information.





Navigating the Tabs

With the exception of the Home, Reports, and Dashboard Tabs, the layout of a typical Tab contains:

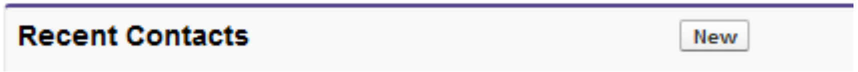
Views

Use the Views available to easily identify records you want to work with. You can also create your own Views to quickly pull up a subset of records to focus on based on criteria you specify. For example, a View can pull up a list of all Accounts in Gauteng. The View dropdown contains both default & custom Views you create (more on Views later).

Tip – Hold down Shift button as you click on a recent item. The link opens in a new window but keeps the previous window open.

Recent Items – on a Tab

This section lists up to the last 25 records of that tabs object type which you recently viewed, created, or modified for quick access to relevant information.



New button

Users will be able to create new records.

Note: Best practice is not to click on the New button on the Accounts and Opportunities Tabs. Refer to the relevant Module to check on how you to create new Accounts and Opportunities.

Reports/Tools

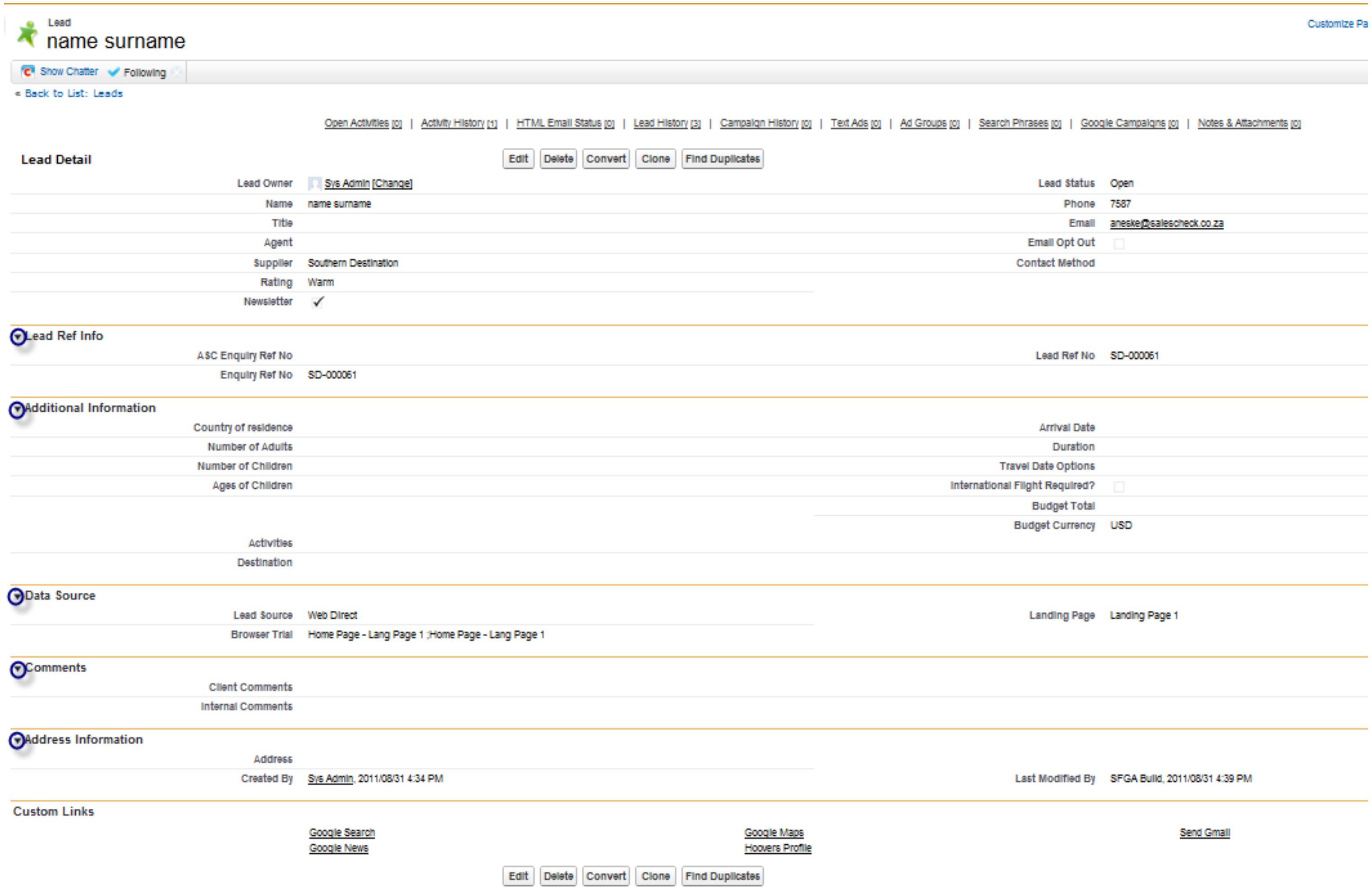
These sections display a small selection of commonly used reports, which can also be found by clicking on the Reports Tab, as well as unique tools specific to each Tab. These Tools will be introduced in later training sessions as specific User requirements are identified,

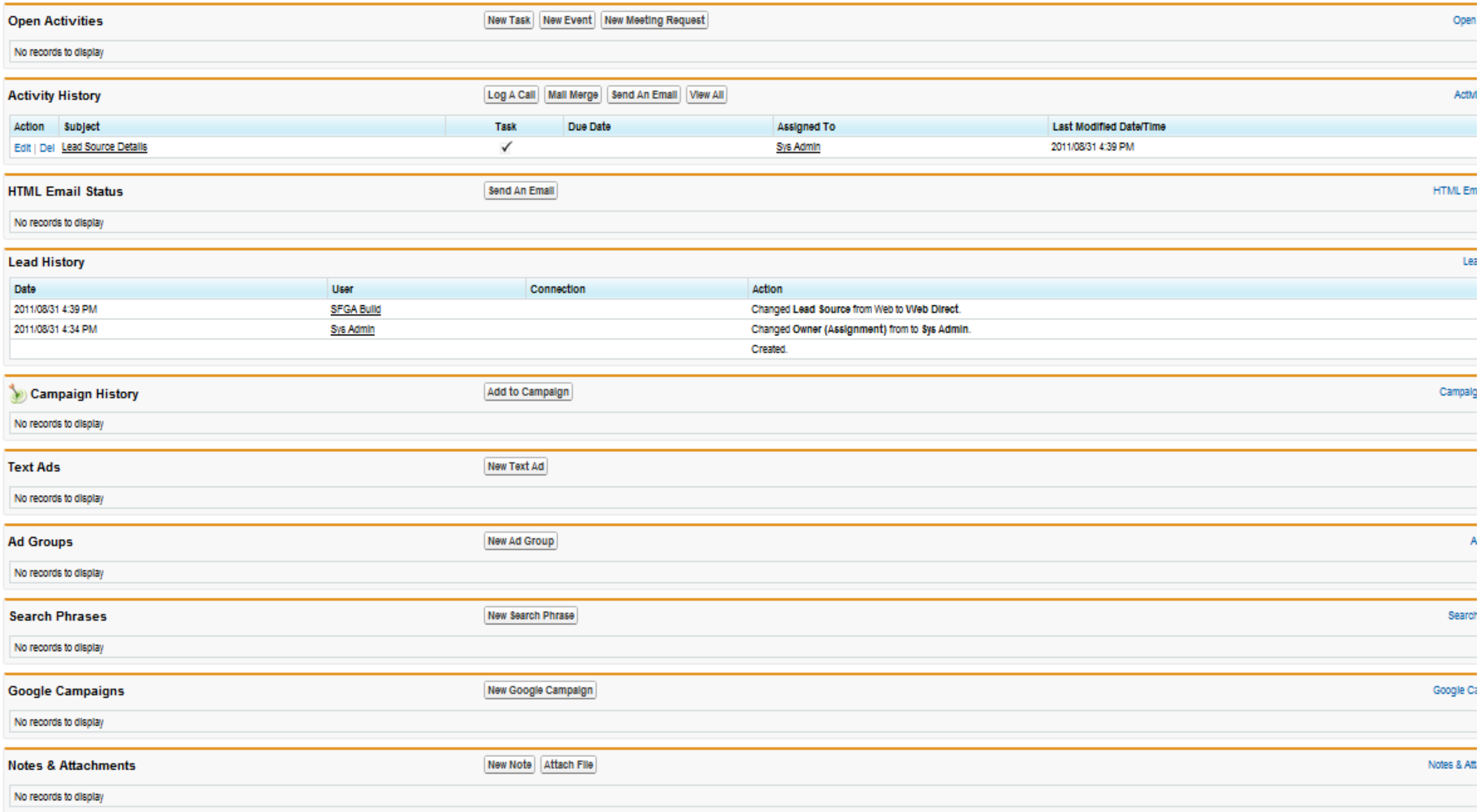
Navigating a Record

All records can be divided into two main parts: the Record Detail and the Related Lists.

Hover over Question Marks to display field sensitive Help

Click on the black triangles to expand and collapse each section in the Detail area of the record.





The related list layout

Navigating within a Record

Record Detail

The detail section of a record, the area bound by a row of buttons (usually starting with Edit) from above and below, contains information specific to the record. For example detail information in an Account can include: Account Name, Account Number and Address Information, etc.

Each sub-section of the details can be expanded or collapsed by clicking on the arrows to the left of the section name.

Note: The data is structured so that information only needs to be entered into one record type - it will be displayed on related records.

Related Lists

Below the record details are the Related Lists, additional related summary information in the form of links you can click on to get further detailed information. For example, when you open an Account and scroll down past the details section, you should be able to see for example, Notes & Attachments, Accounts, Open Activities, Activity History and Opportunities.

Above the Record Details are the Related Lists Hover Links which provide quick access to Related Lists in a record. Rather than scroll down an entire record to get to a specific Related List, you can simply mouse over a Hover Link to view and manage items in a Related list which display as an interactive overlay. Alternatively, you can click on a Hover Link to jump directly down to its corresponding Related List.

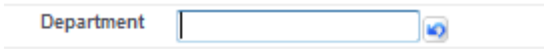
Open Activities [0] | Activity History [1] | HTML Email Status [0] | Lead History [3] | Campaign History [0] | Text Ads [0] | Ad Groups [0] | Search Phrases [0] | Google Campaigns [0] | Notes & Attachments [0]

Related Lists Hover Links (in a account record).

Editing a Record

To edit the Detail section of a record, simply click on the Edit button and make the changes. **Note:** When editing a record, fields marked with a red bar | are required fields and need to be filled in. Remember users can only edit Account, Account or Opportunity records that they own. Manager can edit all their teams' records.

In-line editing. When you are viewing a record in the system (Account, account or opportunity) you can double click on a field you want to change and it will allow you to edit just that field. When you click away from that field the information will turn red. This change has not yet been saved; however, you can now edit another field if you wish.



When you have finished editing click on the 

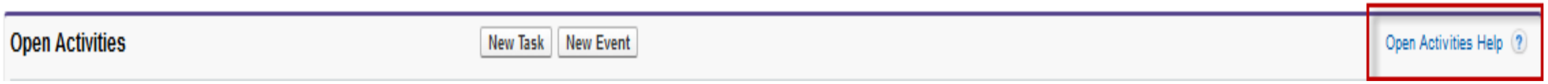
before you change pages. If a padlock appears next to the field, you cannot edit it

Opening a new window

If you are entering data in a screen in Salesforce.com and you need to get information from a different area of the system (particularly relevant when adding opportunities), hold down the shift key and click on the relevant field to open an additional window showing the appropriate information (i.e. you are in a opportunity, hold down shift and click on Account to open second window with the Account information).

Getting Help

Help is only a click away in salesforce.com. Click on any **Help icon** for context-specific help. For additional information, click on the **Help & Training link** found at the top-right of any page. Note: This is generic help. The South Africa 365 version of this help is not customised so you will not find answers to all of your questions here and the system may show you functionality that is not enabled for you.



The Context-Specific Help Icon

The Help & Training link

Note: Help in these areas is generic; information specific to South Africa 365 is not available here. If you want to learn more about salesforce in general this is a good place to start

Tying It All Together

A colleague is on holiday and his customer calls asking about an Opportunity. The customer wants to know the status of his / her quotation

What do you do in salesforce?

Answer:

Learning Check

True or False: Tasks remain on your Home Page until you mark them as complete.

Answer:

All the following are found on a Tab's homepage EXCEPT

A. Hover Related Lists
B. Recent Items
C. Reports
D. Views

Answer:

Summary

By the end of this module, you should be able to:

- Access and log in to salesforce.com
- Understand salesforce terminology
- Use common internet techniques to navigate within salesforce.com
- Use the Global search and Tabs to search for data
- Read and edit a typical record
- Find Help & Training

Module 2:
Campaigns

Module 2: Campaigns

Introduction

A campaign is an outbound marketing project that you want to plan, manage, and track within Salesforce.com. It can be a direct mail program, seminar, print advertisement, email, or other type of marketing initiative. You can organize campaigns into hierarchies for easy analysis of related marketing tactics.

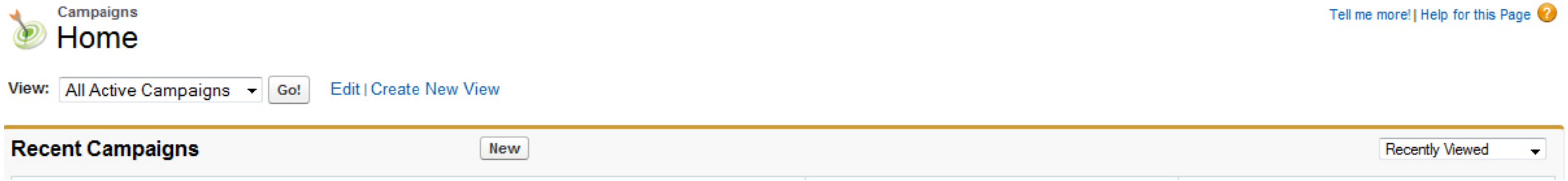
The Campaigns tab displays a home page that lets you quickly locate and report on campaigns. You can also sort and filter campaigns using standard and custom list views. In addition, this tab lets you view and edit detailed information on campaigns.

Objectives

At the end of this module, you will be able to:-

- Understand your Campaign
- Create a new campaign
- Add campaign members

Campaigns Home



- Clicking on the Campaigns tab displays the campaigns home page.
- In the Campaign Views section, select a list view from the drop-down list to go directly to that list page, or click Create New View to define your own custom view.
- In the **Recent Campaigns** section, select an item from the drop-down list to display a brief list of the top campaigns matching that criterion. From the list, you can click any campaign name to go directly to the campaign detail. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the “Campaigns Tab” search layout defined by your administrator and by your field-level security settings. The Recent Campaigns choices are:

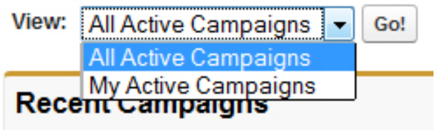
Recent Campaigns Choice	Description
Recently Viewed	The last ten or twenty-five campaigns you viewed, with the most recently viewed campaign listed first. This list is derived from your recent items and includes records owned by you and other users.
My Active Campaigns	The most recent ten or twenty-five campaigns marked as Active, with the most recently created campaign listed first. This list only includes records owned by you.

- Under Reports, click any report name to jump to that report.
- In the Summary section, choose values and click Run Report to view a summary list of your Campaigns.
- Select any of the links under Tools to manage your campaigns.

Viewing Campaign Lists

The leads list page displays a list of Campaign in your current view. From this page, you can view detailed camapign information and access related activity information.

To show a filtered list of items, select a predefined list from the View drop-down list,



or click **Create New View** to define your own custom view.

Click **New Campaign** or select **Campaign** from the Create New drop-down list in the sidebar to create a campaign. These options display only if you have the “Create” permission on campaigns.

Click any column heading to sort the campaigns in ascending order using that column’s information. Click the heading a second time to sort in descending order.

At the top and bottom of the list, click a letter to display the contents of the sorted column that begin with that character.

Click the **Next Page** (or **Previous Page**) link to go to the next or previous set of campaigns.

At the bottom of the list view, select **fewer** or **more** to view a shorter or longer display list.

Click **Printable View** ( ) to display the current list view in a format that is ready for printing.

Click any column heading to sort the Campaigns in ascending order using that column’s information. Click the heading a second time to sort in descending order.

- At the top and bottom of the list, click a letter to display the contents of the sorted column that begin with that character.

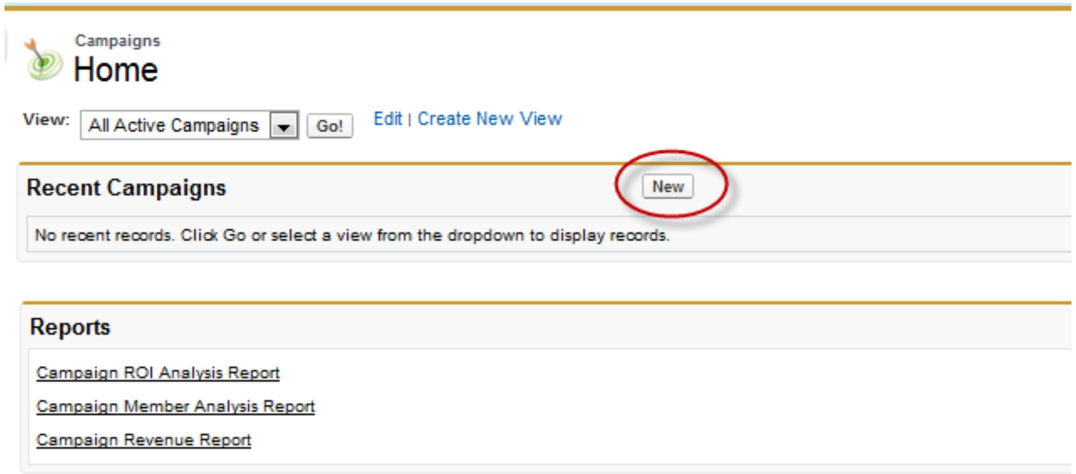
Click **New Campaign** or select **Campaign** from the Create New drop-down list in the sidebar to create a lead.

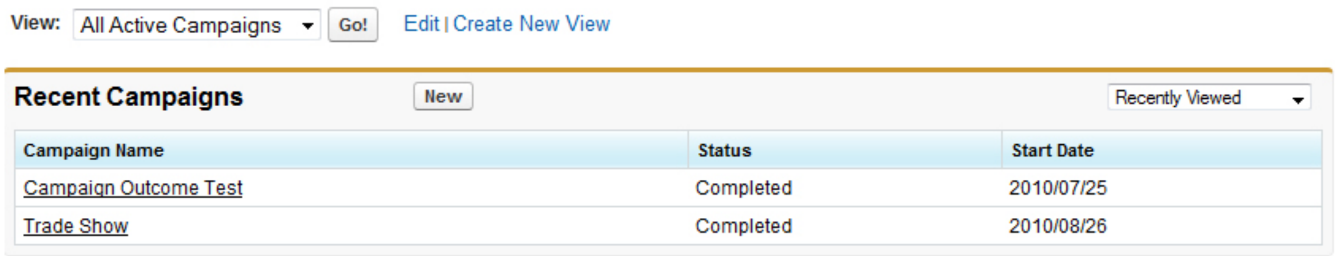
- Click the **Next Page** (or **Previous Page**) link to go to the next or previous set of leads.
- At the bottom of the leads list view, select **fewer** or **more** to view a shorter or longer display list.

Creating a New Campaign

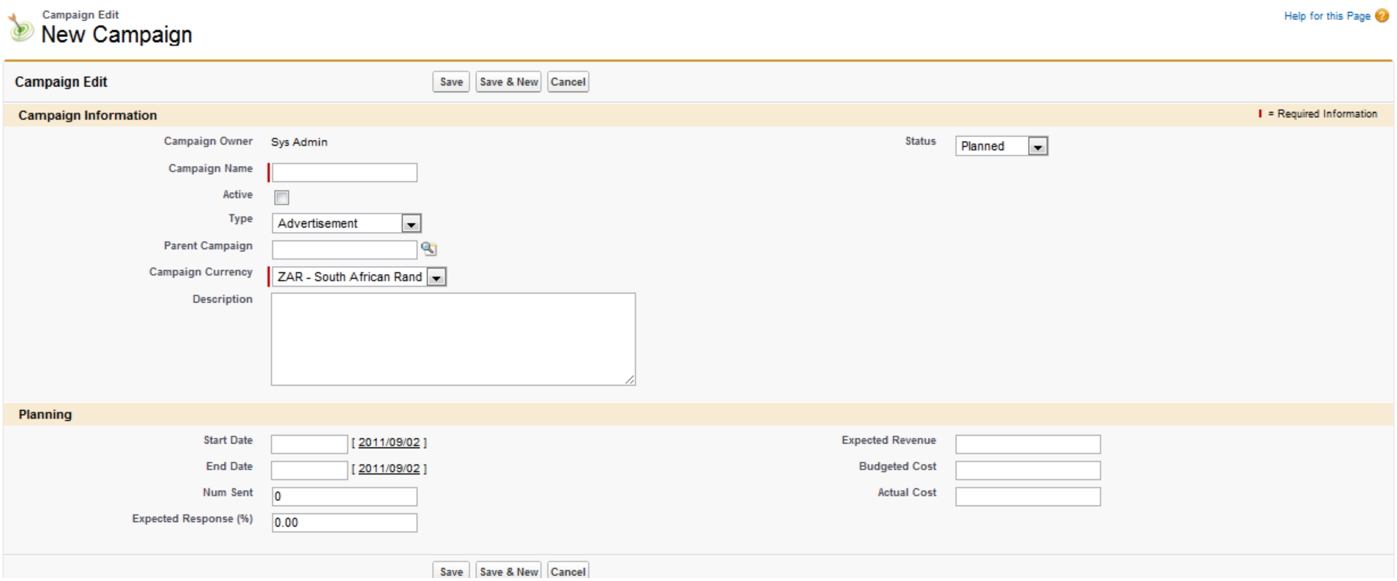
Campaigns can be created in the following ways:

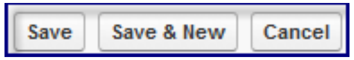
- Campaigns Home Tab
- Create New Short Cut
- Campaigns List View





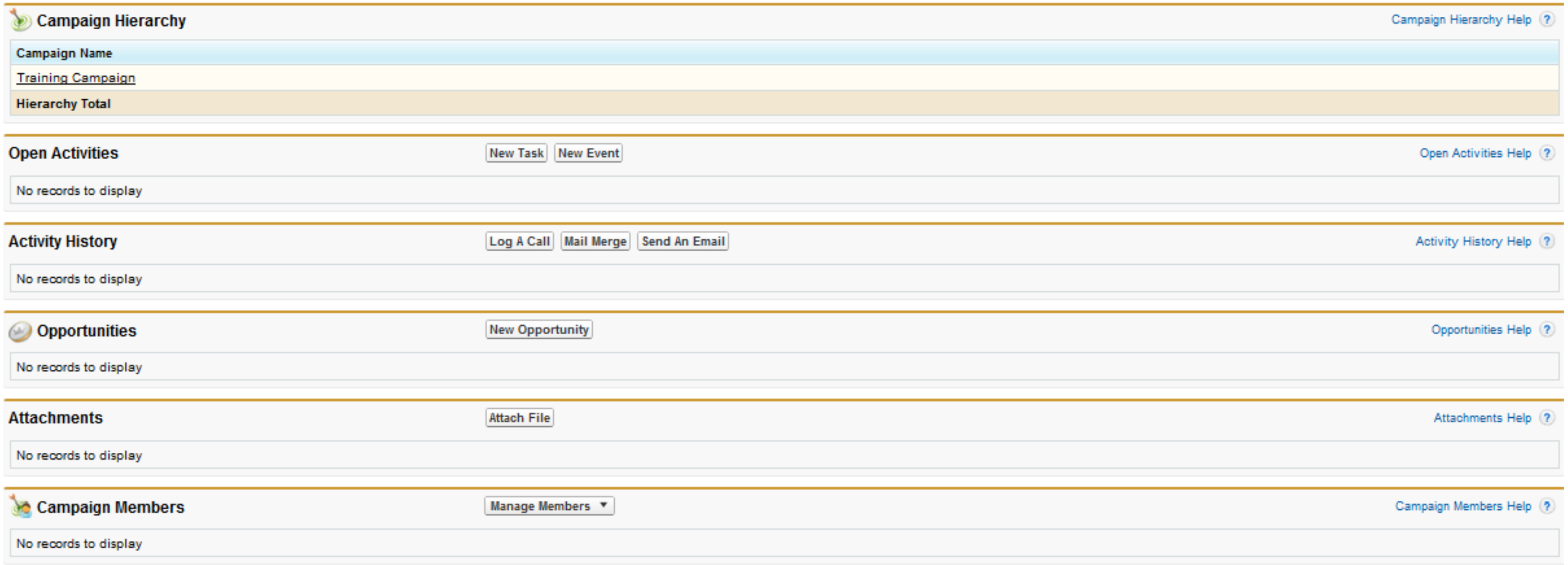
Complete the campaign fields:.





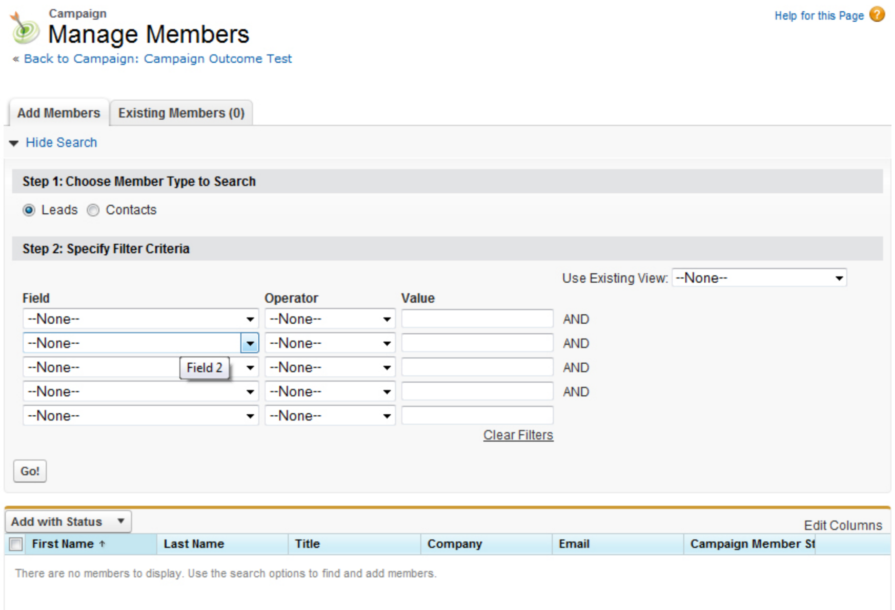
Campaign Related Lists

- The lower portion of the display provides information related to the campaign.
- The related lists you see are determined by your personal customization, and by any customization your administrator has made to page layouts or your permissions to view related data.
- You can click individual items to display additional detail. Click more at the bottom of the page to display more items in the related lists.



Adding Members to a Campaign:

You can add members by searching for current leads or accounts.



To use one of the import wizards, click the Manage Members drop-down button on a campaign detail page and select one of the following:

Add Members - Import File then click Import Leads: With the Lead Import Wizard, you can import a list of new names. Salesforce.com creates leads in the system, and associates those leads with your campaign to create new campaign members.

Update & Add Members - Import File then click Update & Add Campaign Members: With the Campaign Update Wizard, you can import a list of existing Salesforce.com accounts and leads. Salesforce.com associates the records with your existing campaign member records, and updates their response history. In addition, any new leads or accounts added using the Campaign Update Wizard will be added as members of the campaign.

Module 3:
Lead Management

Module 3: Lead Management

Introduction

A lead is a prospect or potential opportunity - a person you met at a conference who expressed interest or someone who filled out a form on your company's website. You can enter leads manually in the Leads tab, or your administrator can import leads. Leads will also be generated from the South Africa 365 website and will also be sent into Salesforce with a Salesforce to Salesforce connection from African Safaris.

http://www.southafrica365.com/enquiry/

The Leads tab displays a home page that lets you quickly create and locate leads. You can also sort and filter leads using standard and custom list views. In addition, this tab lets you create and edit leads, associate events and tasks with those leads, and convert qualified leads into an account, account, and, optionally, an opportunity

Objectives

At the end of this module, you will be able to:-

- Understand your lead records and relationships
- Find your Lead records
- Understand the associated data
- Convert Leads

Leads Home

- Clicking on the Leads tab displays the leads home page.
- In the Lead Views section, select a list view from the drop-down list to go directly to that list page, or click Create New View to define your own custom view.
- In the **Recent Leads** section, select an item from the drop-down list to display a brief list of the top leads matching that criteria. From the list, you can click any lead name to go directly to the lead detail. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the “Leads Tab” search layout defined by your administrator and by your field-level security settings. The Recent Leads choices are:

Recent Leads Choice	Description
My Unread Leads	The last ten or twenty-five leads assigned to you which you have not yet viewed or edited. This list only includes records owned by you.
Recently Viewed	The last ten or twenty-five leads you viewed, with the most recently viewed lead listed first. This list is derived from your recent items and includes records owned by you and othe users.
Recently Created	The last ten or twenty-five leads you created, with the most recently created lead listed first. This list only includes records owned by you.

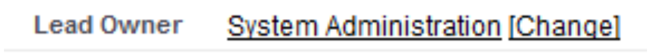
- Under Reports, click any report name to jump to that report.
- In the Summary section, choose values and click Run Report to view a summary list of your leads.
- Select any of the links under Tools to manage your leads.

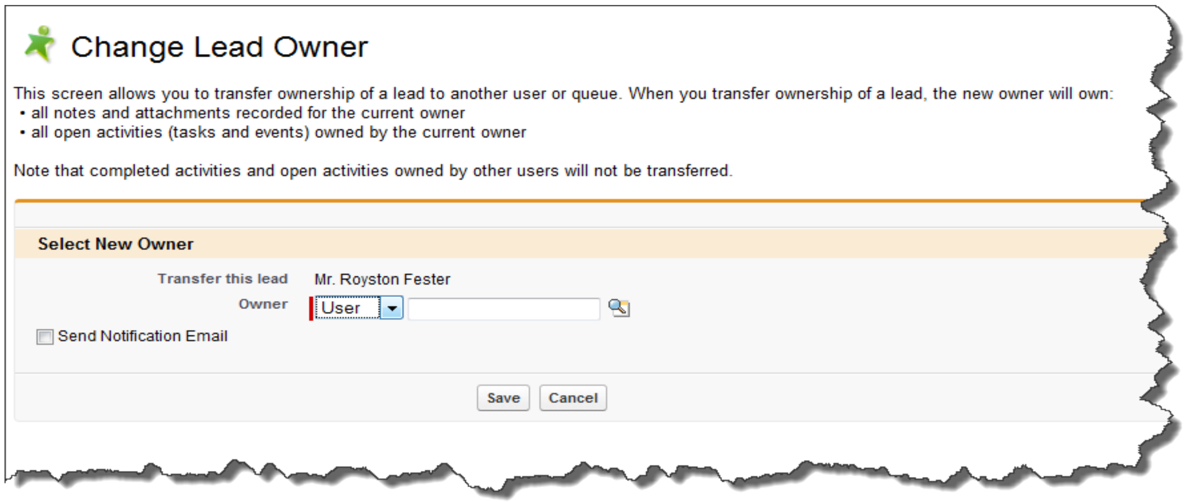
Assigning Leads

- All leads will be assigned to Liesl who will manually assign the leads to the users
- When you manually create a lead from the Leads tab, you are automatically listed as the owner of the lead.

Changing Ownership of One Lead

- To change the ownership of a lead you own or have read/write sharing access to, click the Change link next to the Lead Owner field, and then specify the name of a user or queue. The Change link only displays on the lead detail page, not the edit page.





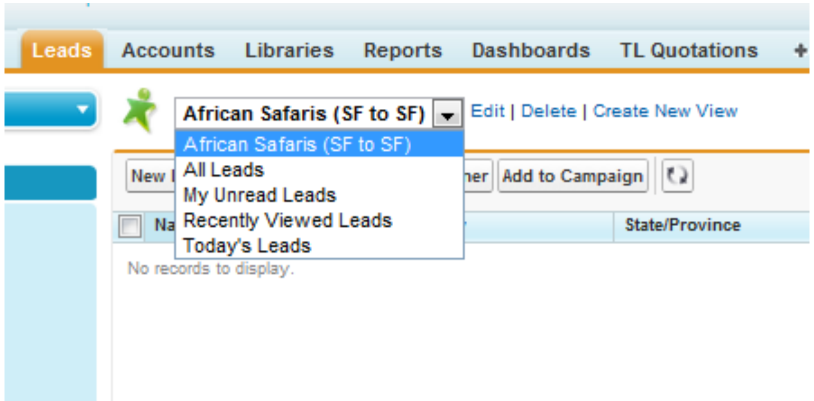
- Select the Send Notification Email box to send an automated email to the new lead owner. If the new owner is a queue, Salesforce.com sends the email to all of the queue members.

All leads that are assigned to you, either manually, via import, or from the web, are automatically marked as “Unread;” that is, they have a check mark in the Unread column on leads list views. So to view your new leads, select the My Unread leads list view. Leads are automatically marked as “Read” only after you view or edit them.

Viewing Lead Lists

The leads list page displays a list of leads in your current view. From this page, you can view detailed lead information and access related activity information.

To show a filtered list of items, select a predefined list from the View drop-down list,



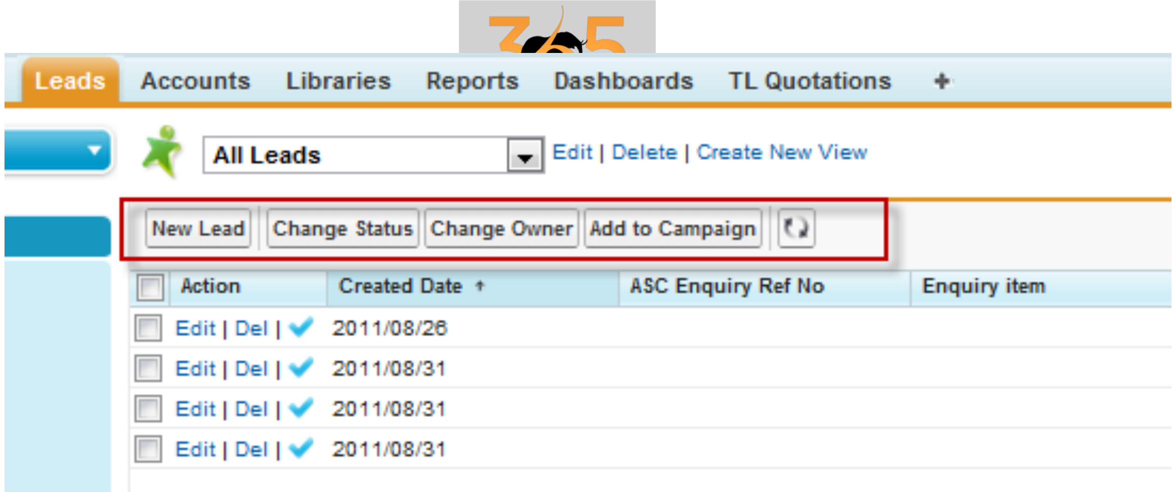
or click **Create New View** to define your own custom view.

Choose the **My Unread Leads** view to see all of your new leads; unread leads are leads you own that you have not yet viewed or edited.

To edit or delete any view you created, select it from the View drop-down list and click **Edit**.

Click **Printable View** ( ) to display the current list view in a format that is ready for printing.

To change the Owner or Status for multiple leads, display your list view, and then check the box next to one or more leads. Optionally, check the box in the column header to select all currently displayed items.



Then click the **Change Owner** or **Change Status** button. If you change the status of a lead you own using the **Change Status** button, the Unread By Owner checkbox is still selected.

Click any column heading to sort the leads in ascending order using that column's information. Click the heading a second time to sort in descending order.

- At the top and bottom of the list, click a letter to display the contents of the sorted column that begin with that character.

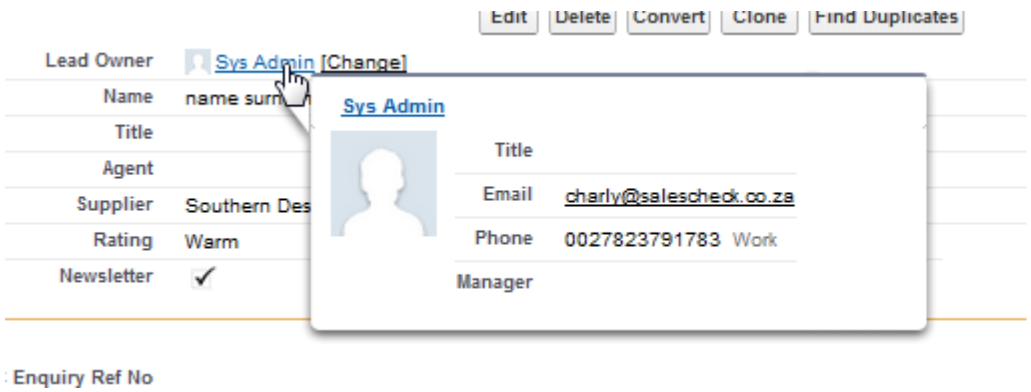
Click **New Lead** or select **Lead** from the Create New drop-down list in the sidebar to create a lead.

- Click the **Next Page** (or **Previous Page**) link to go to the next or previous set of leads.
- At the bottom of the leads list view, select **fewer** or **more** to view a shorter or longer display list.
- Click the **Open Calendar** link at the bottom of the page to display a weekly view of a calendar underneath the list. Then, you can drag a record from the list to a time slot on the calendar to quickly create an event associated with the record. Note that your administrator controls the availability of drag-and-drop scheduling.

Tip

Hover details are available, hover over any lookup field on the detail page to view key information about a record before clicking into that record's detail page.

Once you have located a lead on the leads home or list pages, click the lead name to display detailed information.

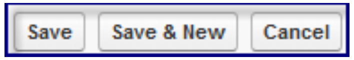


Displaying and Editing Leads

Once you have located a lead on the leads home or list pages, click the lead name to display detailed information.

Editing Leads

- To update a lead, click Edit, and then change the fields you want to update.
- When you have finished, click Save. You can also click Save & New to save the current lead and create another.



Lead Related Lists

- The lower portion of the display provides information related to the lead, including activities, notes, attachments, and any campaigns associated with the lead.
- The related lists you see are determined by your personal customization, and by any customization your administrator has made to page layouts or your permissions to view related data.
- You can click individual items to display additional detail. Click more at the bottom of the page to display more items in the related lists.

Printing Leads

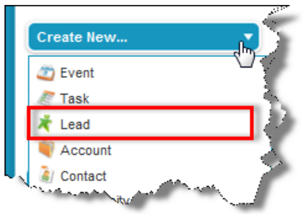
- To open a printable display of all information for a record, click **Printable View** on the detail page

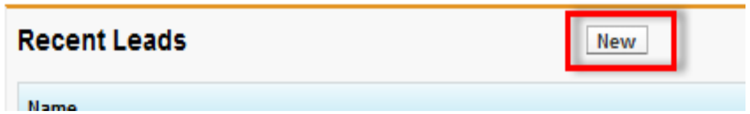
Note Related list hover links display at the top of each detail page. Hover your mouse pointer over a related list hover link to display the corresponding related list and its number of records. An interactive overlay allows you to quickly view and manage the related list items. You can also click a related list hover link to jump to the content of the related list without having to scroll down the page.

Creating Leads

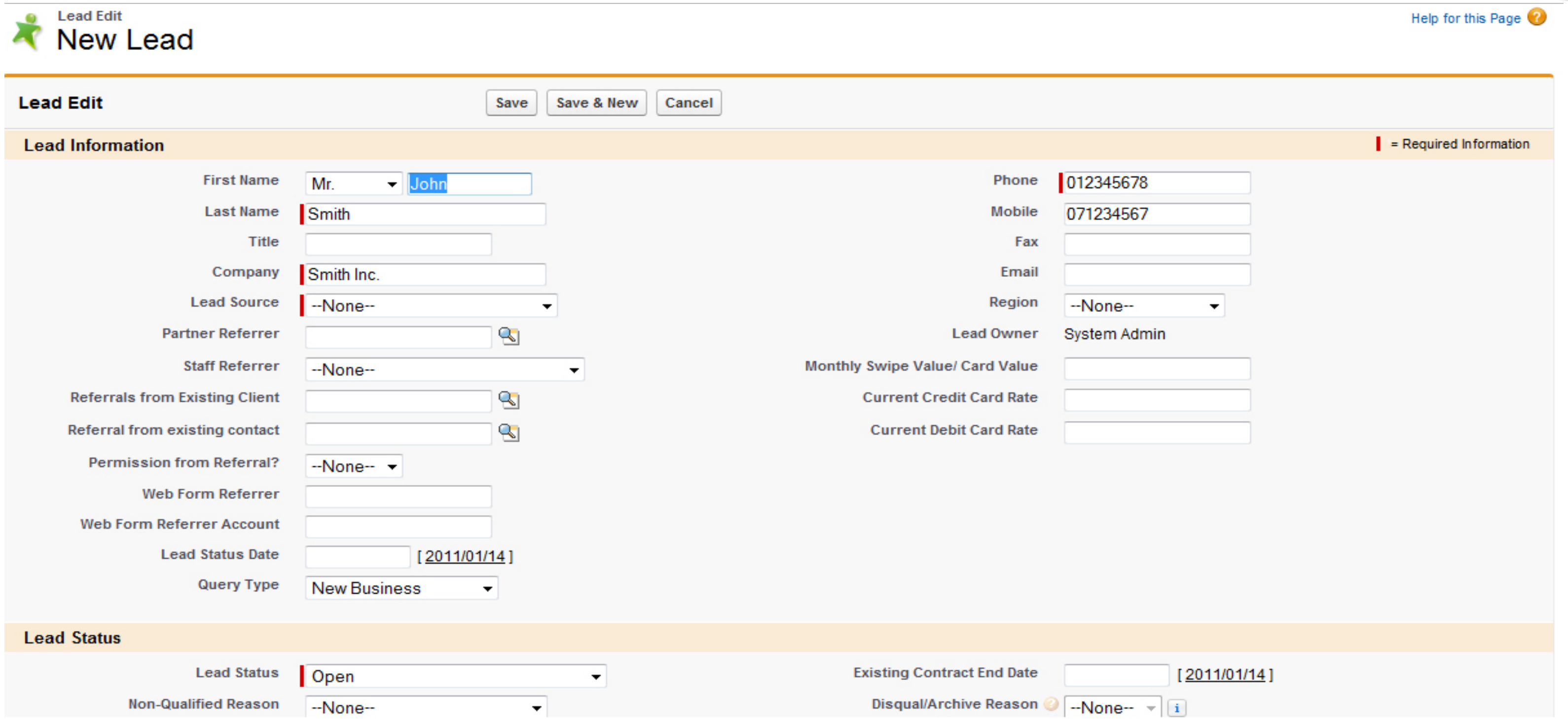
To **manually** create a new lead:

- Select **Lead** from the Create New drop-down list in the sidebar,
- or click **New** next to **Recent Leads** on the leads home page.

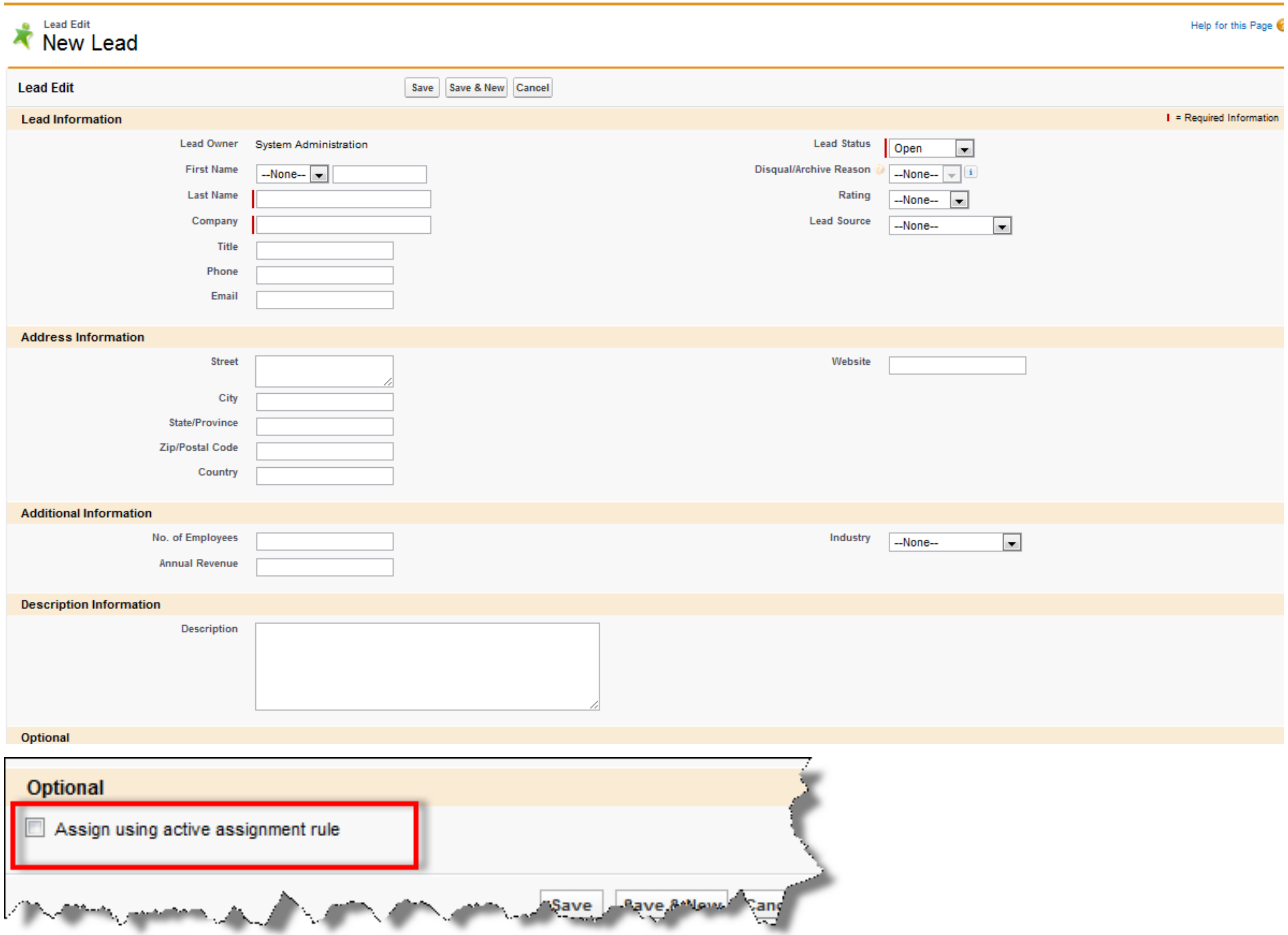




- Complete the new lead information:.



Select the checkbox below the lead information to assign the lead automatically using the active lead assignment rule. If you do not check the box, you are assigned as the owner.



Click **Save** when you are finished, or click **Save & New** to save the current lead and add another.

Selecting the Assign using active assignment rule will assign the lead to Liesl.

Converting Leads

When you convert a lead, Salesforce.com creates a **new account (or gives the option to add the opportunity and account to an existing account), account**, and, optionally, **an opportunity** using the information from the lead.

Southern Destination will only create new opportunities by converting leads.

If an existing account and account have the same names as those specified on the lead, you can choose to update the existing account and account.

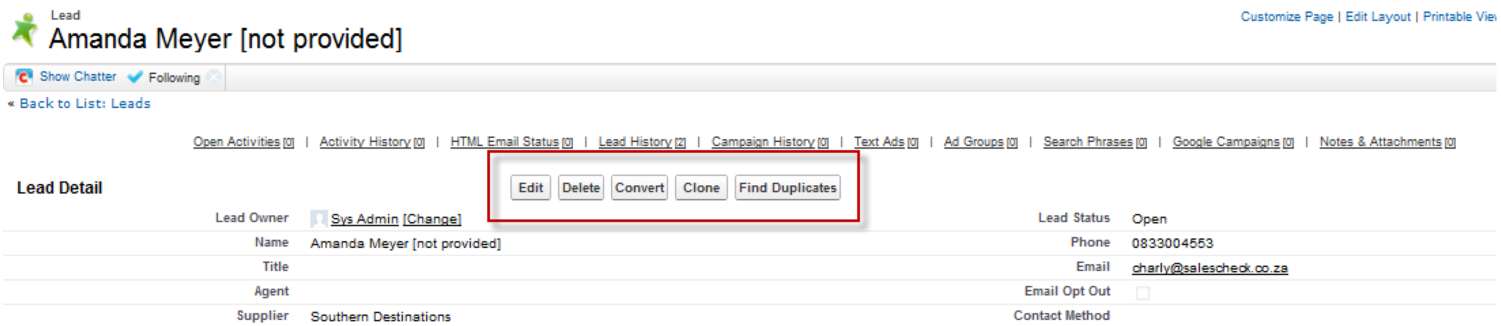
Information from the lead is inserted only into blank fields; Salesforce.com **does not overwrite existing account and account data.**

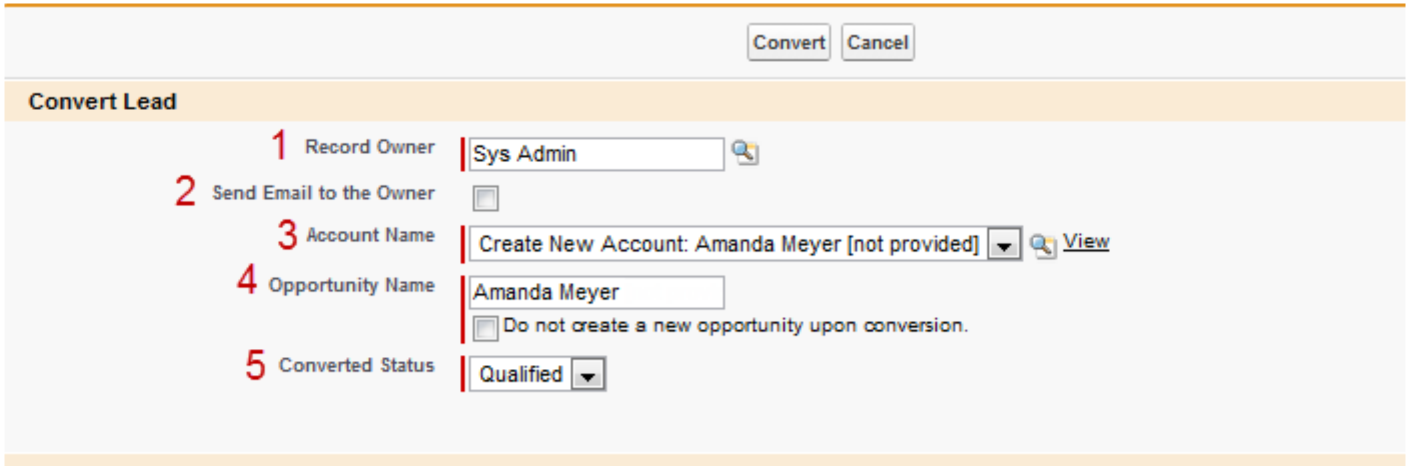
All open and closed activities from the lead are attached to the account, account, and opportunity.

You can assign the owner of the records, and schedule a follow-up task. When you assign a new owner, only the open activities are assigned to the new owner.

To convert a lead:

1. From the lead detail page, click **Convert**.





2. 1 Option allows you to change the owner of the lead.

This reassigns all notes, attachments, and open activities to the new owner but does not change closed activities.

2

Select the Send Email to the Owner checkbox to send an automated email to the new owner

3

3. In the Account Name field, select a new account or search for an existing account. Click **View** to open a printable view of the existing account. Information from the lead is inserted only into blank fields; it will not overwrite existing account data.

4

4. In Name the Opportunity field, enter a name for the new opportunity, or select the Do not create a new opportunity upon conversion checkbox if you do not want to create an opportunity.

5

5. In the Converted Status picklist, select a status for the converted lead. Choices include statuses marked as “Qualified” by your administrator.

6. **Optionally**, fill in the following fields to schedule a follow-up task that is automatically assigned to the record owner:
   - Subject—The subject or short description of the task. You can enter a subject, or select from a picklist of previously defined subjects.
   - Due Date (optional)—Date when the task should be completed. You can enter a date, or choose a date from the calendar that displays when you put your cursor in the field.
   - Comments (optional)—Text note describing the task. This field can hold up to 32KB of data.
   - Status—Current status of task, for example, Not Started or Completed. (Picklist selections can be customized by your administrator.)
   - Priority—Urgency of the task, for example, Low, Medium, or High. (Picklist selections can be customized by your administrator.)
   - Send Notification Email (optional)—Select this checkbox to send a notification about this task to the assignee.
   - Reminder (optional)—Select this checkbox to schedule a reminder for this task.
7. Click **Convert**.I

   If a duplicate account exists, choose whether to create a new account or update the existing account. Information from the lead is inserted only into blank fields; it will not overwrite existing account data.When updating an existing account, check the box if you want to overwrite the Lead Source field in the account with the value from the lead.click **Convert** to finish.

Tying It All Together

You have a customer who is interested in making travel arrangements with South Africa 365.

What do you do in salesforce?

Answer:

Learning Check

Match the term to the correct definition.

Lead	Individual or influencer associated with an account you're tracking in Salesforce.
Account	Organization, individual, or company involved with your business.
Contact	Potential revenue-generating event that you want to track in Salesforce.
Opportunity	Person, organization or company interested in your products.

What happens in Salesforce when you need to convert a Lead into an Account?

- You need to re-type in all the information again, creating an Account, Contact, and Opportunity record from scratch.
- Salesforce creates an Account, Contact, and Opportunity record but you still need to copy and paste all the information from the Lead record into these new records.
- With the Convert Lead button, Salesforce will do all the work, creating a new Account and Contact Record and transferring all the information from the Lead into the correct fields. You can choose to create an Opportunity record as well.

Summary

By the end of this module, you should be able to:

- Create a Lead
- Find Leads allocated to yourself
- Convert a Lead

Module 3:
Account Management

Module 3: Account Management

Introduction

Accounts in salesforce let you view and maintain critical information about companies that you wish to record information about. These companies may be current Accounts you are dealing with, dormant Accounts, competitors, etc. South Africa 365 will be using person accounts:
A person account is an individual consumer with whom you do business, such as a financial services client, an online shopper, or a vacation traveler. Person accounts are applicable to organizations that operate on a business-to-consumer model as opposed to a business-to-business model.

All the account and personal information regarding a customer / client is saved in this object.

Objectives

At the end of this module, you will be able to:-

- Understand your customer records and relationships
- Find your Person Account records
- Understand the associated data
- Set up new Person Accounts
- Update existing Accounts

What is A Person Account?

A person account is an individual consumer with whom you do business, such as a financial services client, an online shopper, or a vacation traveller. Person accounts are applicable to organizations that operate on a business-to-consumer model as opposed to a business-to-business model. An Account has relationships with other tabs in salesforce and is the backbone of all the data. All other records roll up and are visible in the Accounts Related lists.

From this vantage point, use Account records to quickly take in the view from the top, and easily drill down to linked information such as Opportunities, Travel Logic Quotations and any related Activities.

Locating Accounts

Accounts can be found four main ways:

1. Using the Global/Advanced search
2. Referring to the Recent Items section in the Sidebar or Accounts tab
3. From the Accounts Tab, select an Account View to pull up a list of relevant records
4. Using the view list

Searching for a Account– using Search

The 'Search' option in the Global search looks for all matching records.

To search for an Account:

1. From Global search, type the name of the company in the search box and click on Go!.
2. From the search results, click on the Account name
3. If the record is not found it means the Account does not exist and will need to be created in salesforce

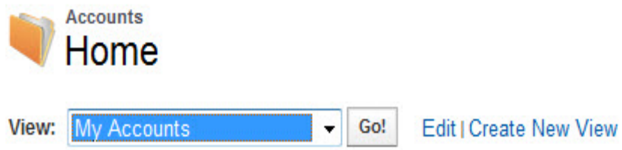
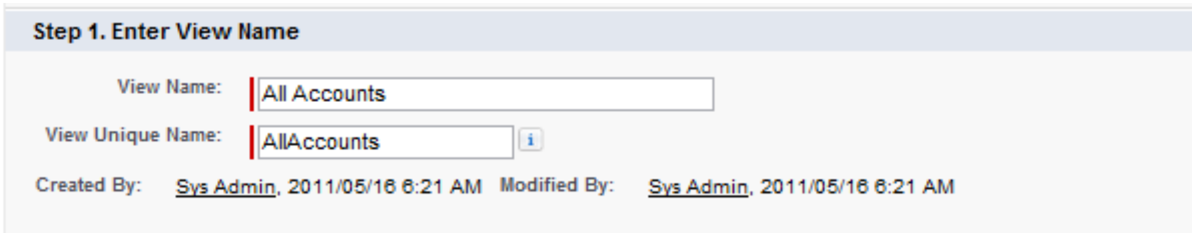
Searching for an Account using Views

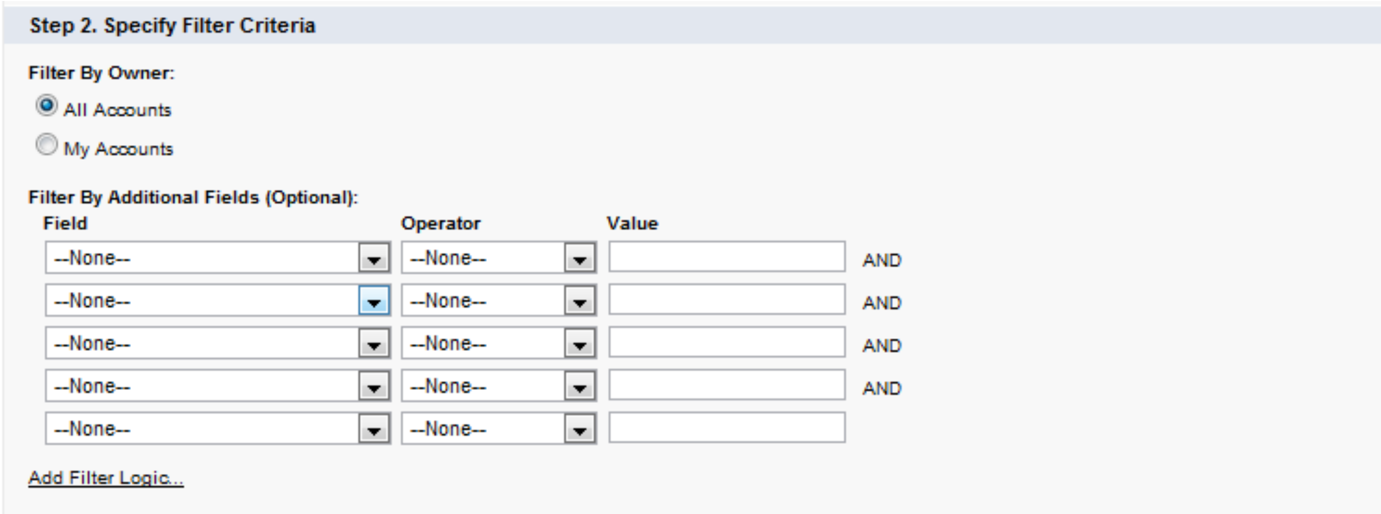
You can search for a number of Accounts by using the Views. A number of views have already been created, however you can create views specific to your own needs. NB Do not use the View of 'My Accounts' as this will not return all the Accounts that you have an interest in. Please see below to see how to produce a report of all interested Accounts

Select a view by clicking on the drop down, highlight the view and click Go to display the records.

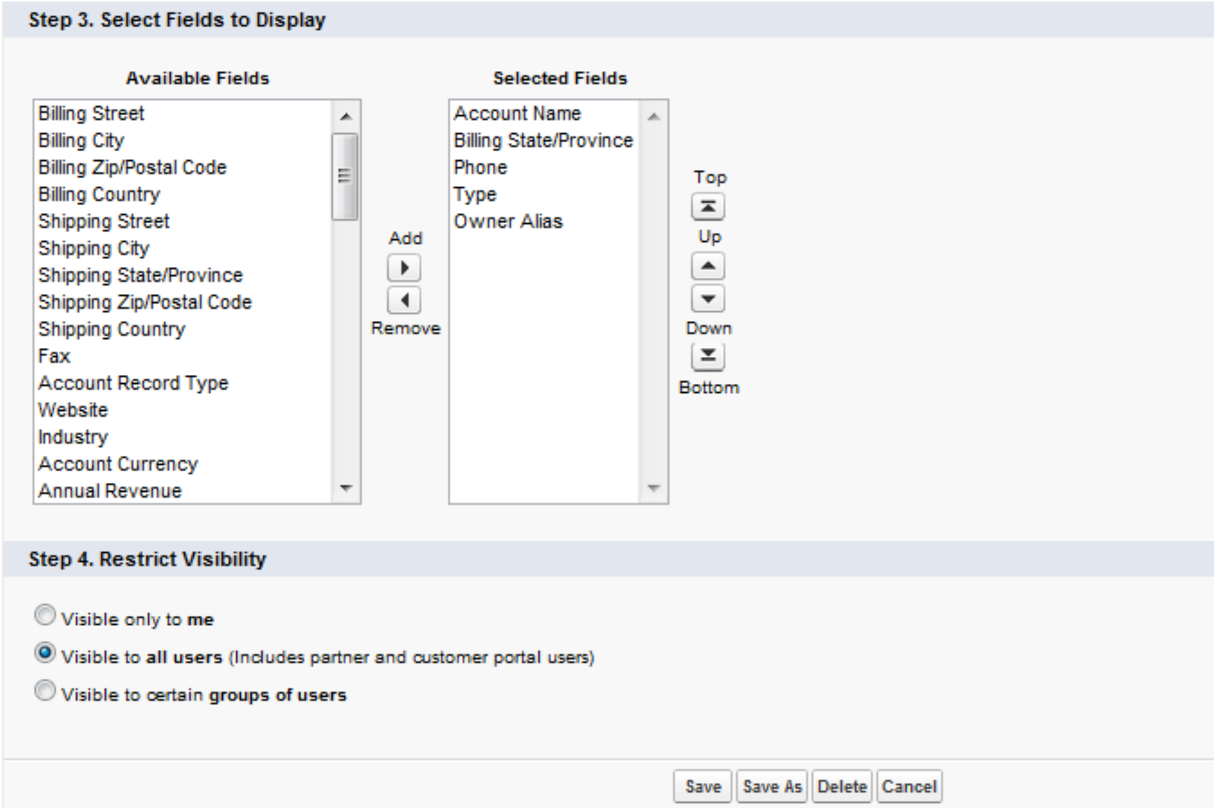
Creating Views

To create a new view

Step	Action
1	Click on Create New View. 
2	Enter the name of your view. 

3	Specify the search criteria – select All Accounts. The way South Africa 365 have set the system up means that "My Accounts" will only return records for which I am the owner. 

<table>
<tr>
<td>4</td>
<td>
Select the columns you wish to see in the view

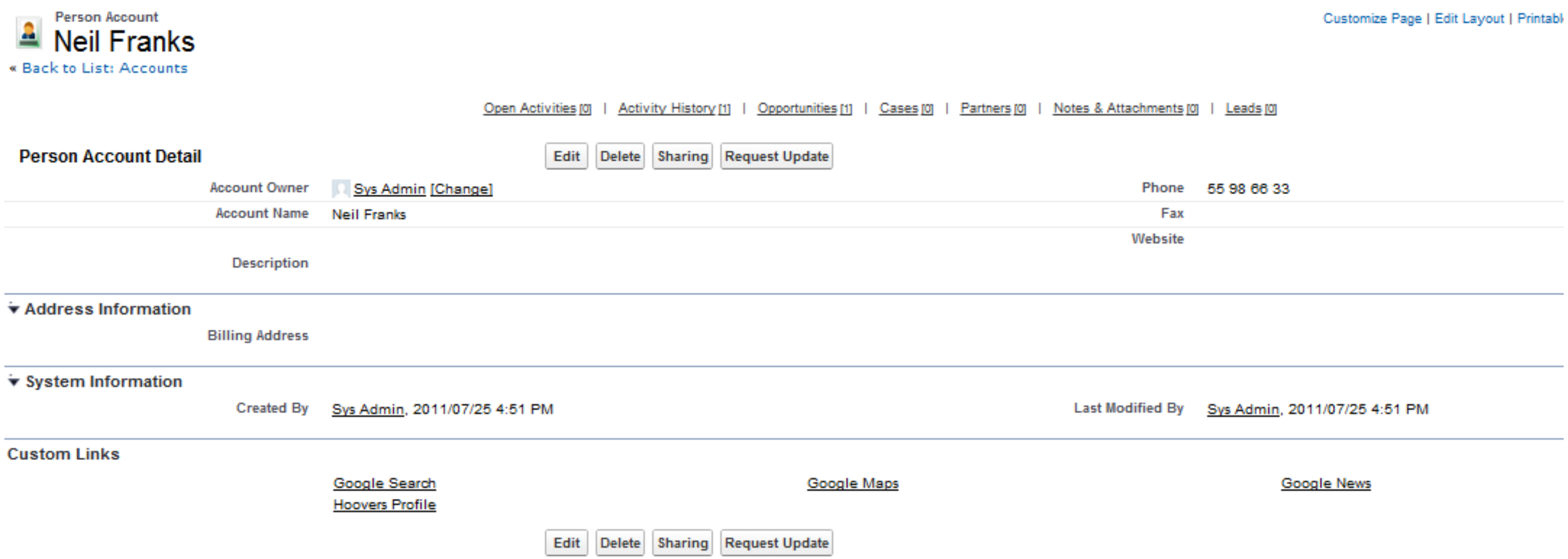


If you are an administrator or a user with the “Manage Public List Views” permission, specify whether everyone or just you can see the custom view.
Users can specify a public group, role, or role including all users below that role to see the custom view.
To share the list view, select Visible to certain groups of users, choose the type of group or role from the drop-down list, select the group or role from the list below it, and click Add.
.
</td>
</tr>
</table>

5	Click the Save button. This will also run the view.

Account Details

The Detail section of an Accounts record contains links and editable fields for capturing information.



Account Details

This section has the Account name, Account type, Account details and company profile details.

Address Information

This section holds the full Correspondence Address

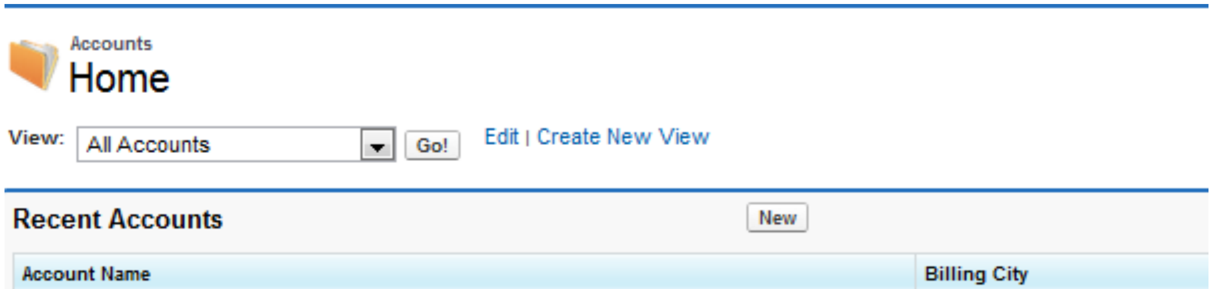
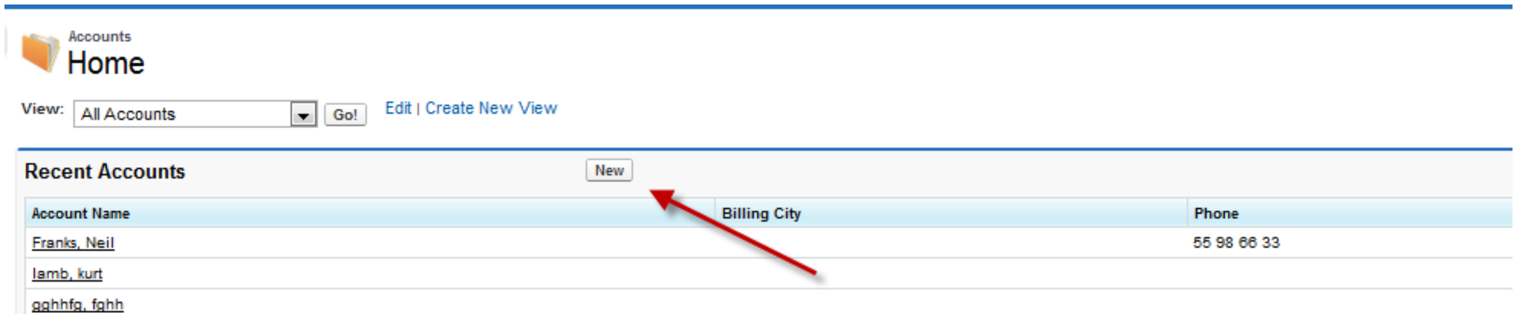
Additional Information

This section holds extra company details.

How to add a new Account

A new account will be created when a lead is converted. Al accounts will be created from leads.

To create manually create a new Account

Step	Action
1	Having first searched to ensure the Account does not already exist, select Accounts from the tabs on the home page
2	Select New on the Recent Accounts section 
3	Select New Account 
4	Complete the fields in the New Account screen. The mandatory fields will have a red marker next to them.
5	Click the Save button to add the new Account to salesforce.

Account Related Lists

An Account's Related Lists give you 360 degree visibility on all information linked to the Account. Simply mouse over the Related List to see the linked items. Click on the links to display the record.

Open Activities [0] | Activity History [0] | Opportunities [0] | Cases [0] | Partners [0] | Notes & Attachments [0] | Leads [0]

Opportunities

Use this Related List to view all opportunities at this Account (covered later).

Open Activities

Activities are scheduled Tasks and Events used in salesforce.com to track all the significant activities involving the customer. The Open Activities Related List contains all your uncompleted to-do items and future appointments/meetings (covered later).

Activity History

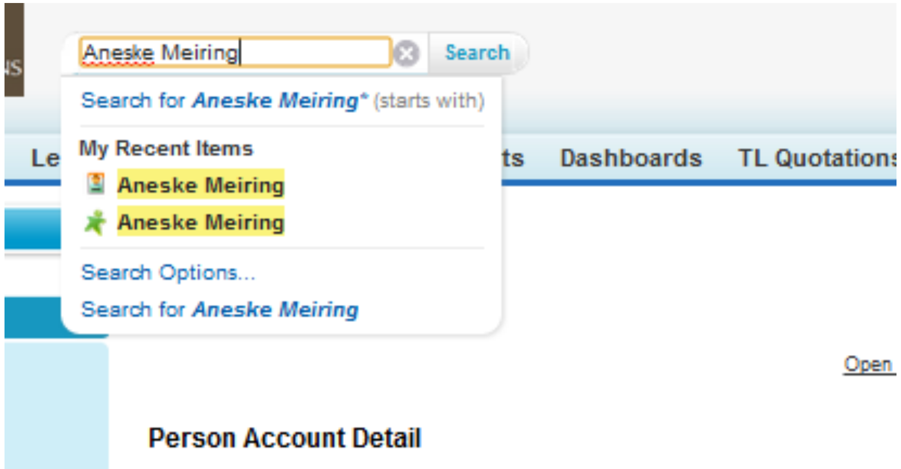
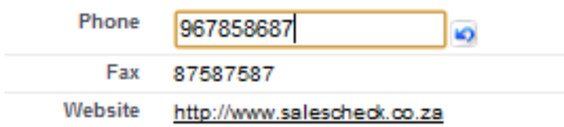
Once a Task's status is marked as Completed and an Event's date and time has passed, they move from the Open Activities Related List to the Activity History List. You can also record additional Tasks from the Activity History list, such as Log a Call, which defaults to a Completed status (covered later).

Notes & Attachments

Allows a user to add notes and attachment for the account.

Working with Accounts – Updating information

To edit an Account Detail section:

Step	Action
1	Search for the Account from the Global Search: 
2	Click the Account name in the search results.
3	Click the  button or use In-Line Editing 
4	Make any necessary changes.
5	Click the  button.

Tying It All Together

A customer asks for a new quote but they also inform you that they have moved and needs to update their address details with South Africa 365.
What do you do?

Further investigation shows that the information stored on Salesforce is incorrect. How can you store this new information?
Answer

Learning Check

How are Accounts entered into salesforce.com?
Answer:

What are the various related lists for
Answer:

Who can edit an existing Account?
Answer:.

Summary

You should now be able to:

- Understand your customer records and relationships
- Find your Account records
- Understand the associated data
- Set up new Account
- Update existing Accounts

Module 4:
Managing Opportunities

Module 4: Managing Opportunities

Introduction

Opportunities in salesforce.com help you efficiently pursue a potential sale *(and manage the sales through the sales cycle.)*

You can use opportunities to input prospective Account information. All Opportunities must be created from the Account record.

Objectives

At the end of this module, you will be able to.

- Locate your Opportunities
- Understand how the system tracks the sales process
- Add new Opportunities
- Create Travel Logic Quotes
- Manage your Opportunities through the pipeline

What is an Opportunity?

Definition: An opportunity is a prospect piece of business, which can be monitored through the pipeline from quote/tender to Opportunity completion.

Locating Opportunities

Opportunities can be found in salesforce.com in several ways:

1. Using the Global/Advanced search
2. Referring to the Recent Items section in the Sidebar or Opportunities tab
3. Running an Opportunity View to pull up a list of Opportunities
4. From the Opportunity Related List on an Account record

To search for an Opportunity do the following:

1. From the Global search, type the name of your Opportunity in the search box and click 

2. From the list of search results, click on the Opportunity name

Sales Process

For Southern Destination all opportunities will be created from leads that is converted.

If a person have already been a customer of Southern Destination the lead conversion process will detect the duplicate accounts

You will need to maintain the detail in the Opportunity to indicate where you are in the sales cycle to ensure that reporting always reflects latest pipeline and revenue figures.

Editing an opportunity

After you have located the opportunity that was created from the lead conversion process you can edit the opportunity information so that you can generate a quote from Travel Logic.

Chaning the Opportunity status to “Raised a quote”, will automatically create the details in Travelogic.

The following Information is sent to Travellogic:

```
CRM Reference: Salesforce
User Name: smoore
Subject:  Southern Destinations
Client Name: Barry Moon
Phone:
Mobile:
Email: neil@southerndestinations.com
Email Opt Out:
Contact Method: Email
Country of Residence:United States
Number of Adults: 2
Number of Children:
Ages of Children: 0
Duration: 10
Arrival Date: 1973/10/06
Budget Total: 20,000
International Flight Required?: 1
Travel Date Options:
Lead Source:
Browser Trial:
Landing Page:
Client Comments:
Lead Currency: ZAR
Supplier__c: Southern Destinations
```

- Users now need to log into Travel and generate the required quotation, when the quote have been generated in Travel Logic then the opportunity will be updated with the information from Travel logic.
- This information will be updated into Salesforce into the TL Quotation object which is displayed as a related list under the related opportunity.

TL Quotations New TL Quotation

Action	Created Date	Group Name	Travel Start Date	CoS	Sales	ROE	Gross Profit	GP %	Age	Properties Sum
Edit | Del	2011/08/30	moon	2011/08/31	ZAR 71,977.50	ZAR 91,196.40	1.00	ZAR 19,218.90	26.70	3	Sanctuary Lodg

Opportunity Related Lists

Related Lists represent additional information linked to an Opportunity.

TL Quotations

TL Quotations displays all the quotes for the related opportunity that have been generated from Travel Logic. Each time a quote is changed or a new quote is created for the related opportunity the TL Quotation will be updated with the information from Travel logic.

Open Activities

Activities are scheduled Tasks and Events used in salesforce.com to track all the significant activities involved in working with this Account. The Open Activities Related List contains all your uncompleted to-do items and future appointments/meetings with this Account. (covered in the Activities Module)

Activity History

Once a Task's status is marked as Completed and an Event's date and time has passed, they move from the Open Activities Related List to the Activity History List. You can also record additional Tasks from the Activity History list, such as Log a Call, which defaults to a Completed status. (This will be explained in Activities Module)

Stage History

Tracks the status changes in the various stages

Stages for South Africa 365 include:

- Raised a quote
- 1st account made (by email or phone)
- Email / negotiating / repel
- Raised invoice / pro forma
- Money in the bank
- Closed lost

The sales stages takes the opportunity through the sales cycle and needs to be updated by the user / agent

Tying It All Together

How will opportunities be created in Salesforce?

Answer:

Learning Check

Where do you see update history for the Stage Field?

Answer:

Summary

By now you should be able to:

- Locate your Opportunities
- *Understand how the system tracks the sales process*
- Add new Opportunities
- Manage your Opportunities through the pipeline

.

Module 5:
Managing Activities

Module 5: Managing Activities

Introduction

Activities are used in salesforce to track all the significant tasks and events involved in acquiring, selling to, and servicing Customers. By managing Activities in salesforce, you can better coordinate with your team including sales support, quickly assess what is happening with your Opportunities, and focus on the next steps to close Opportunities or solve issues.

All calls, both pre-planned and impromptu, can be logged as events on Salesforce.com and can be monitored. The key message here is, “If it is not on Salesforce.com, it didn’t happen”.

Objectives

By the end of this module, you should be able to:

- View, create and update Tasks, Events

What is an Activity?

Definition: An Activity is a scheduled calendar Event or Task.

Tasks

A Task is essentially a to-do, an action that needs to be completed by a specific date. For example, after a meeting with your customer, you can create a Task to remind you to do a follow-up phone call in a week. Tasks can be used in relation to passing work between consultant & sales support; this would also then create a clear audit trail.

Events

An Event is a calendar activity, such as meetings, customer visits, or calls. Like a Task, Events occur on a specific date, but also have a specific time, duration, and often, a location.

- If you want any of your Activities to remain open, locate them and mark them as “Not Started” or “In Progress” then save them and they will appear on your My Tasks section of your home page.
- You can set up reminder times for all Events and Tasks. You can set your default setting to no reminder, or to a specific time before each meeting i.e. remind me the day before.
- Incoming calls should be logged by using the “Log a Call” button in Activity History   All other calls should be added as Events

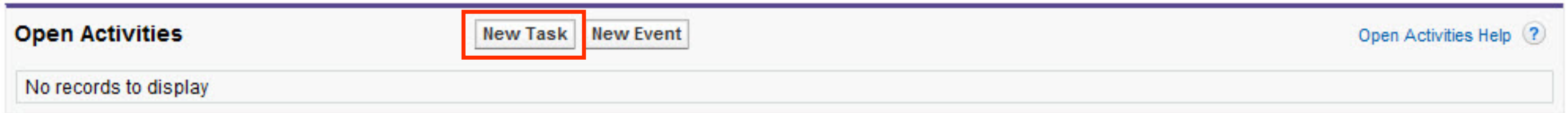
Creating Tasks

Creating a Task

Use tasks to remind yourself or someone else of an action item that needs to get done with regards to a Account, Opportunity, or Account. For example, after a meeting with a customer you set a task to call an Employer to chase up missing details or pass the task to another users such as sales support to follow up

You can use the 'Reminder' feature to alert you the Task is due for completion.

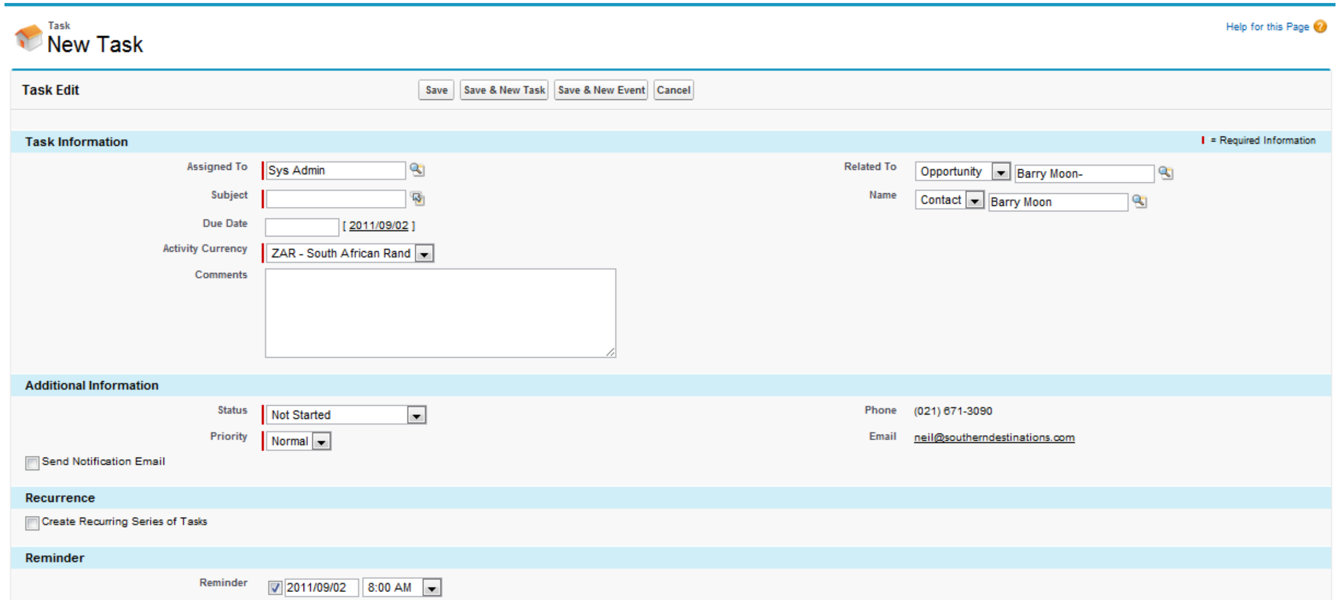
Note: As best practise most activities should be added to a person account and related to an opportunity.



Creating a Task

To create a Task:

Step	Action
1	Search for the Account that you want to link the Task to
2	Click the Account name in the search results.
3	Click the **New Task** button in their Open Activities related list.
4	



Note: When you create a Task, the Task is assigned to you by default. Use the magnifying glass look-up icon to assign the task to another person. If you re-assign the task to someone else, check **Send Notification Email** so that the person receives an email alert of the Task.

5 Enter Task details:

Set a Reminder time. Click the **Save** button.

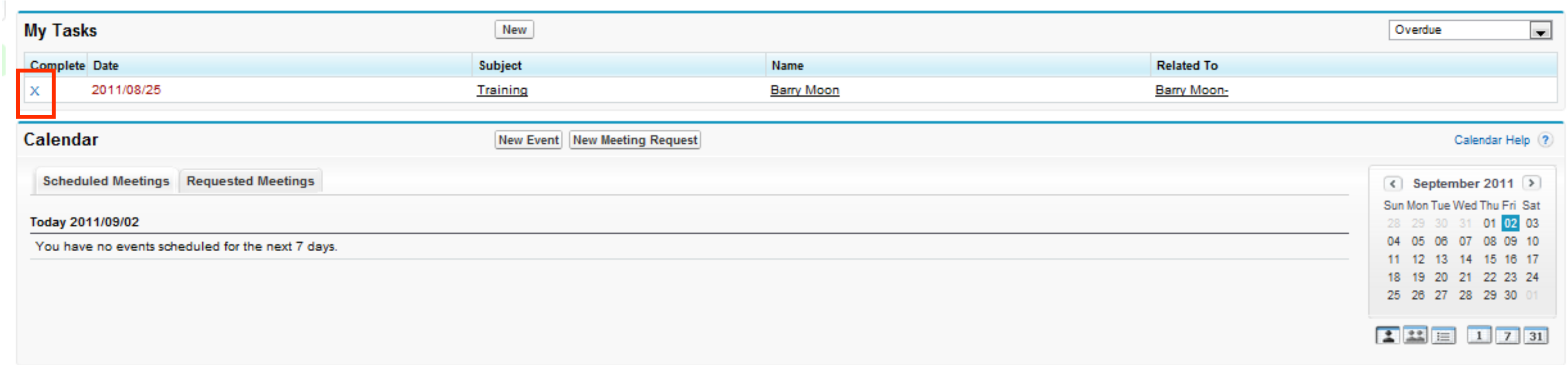
Once the Save button has been clicked the task will appear on the **HOME** page of the person it has been assigned to. It will also appear in both the Accounts and Account's **Open Activity** related list

Completing a Task

Completing a Task

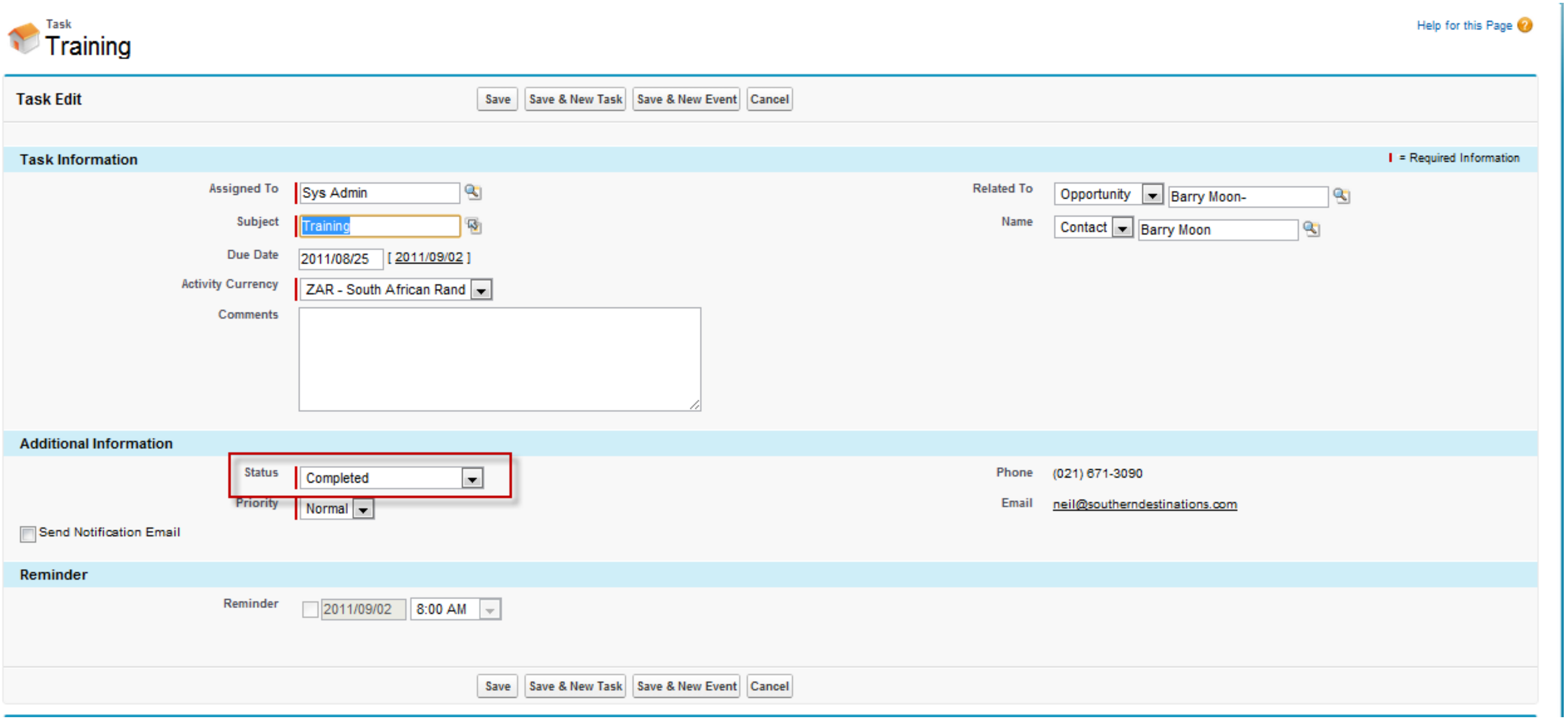
Once the phone call has taken place the task can be closed. There are 2 ways of doing this

1) From the home page, click on the cross next to the task. This method is recommended.
2) Finding the account and then displaying the task, then editing the task and changing the **task status** to **Closed**



Notice that Overdue tasks are shown with their Date displayed in red.

Clicking on the **X** next to the task opens that task in edit mode and automatically changes the status to **Complete**



Further updates can be made to the Comments section as required.

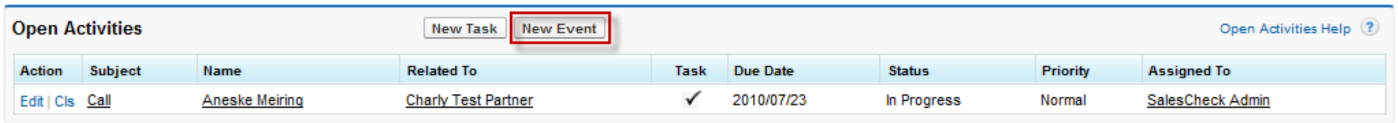
The task can now be saved by clicking on the **Save** button. However, in this scenario, we have managed to book a meeting with the account and it is possible to create a New Event by clicking on the **Save & New Event** button

Creating Events

Creating an Event

The previous scenario showed how to create a New Event from an existing Task. It is also possible to create an Event from the Account or Opportunity Open Activities related lists, similar to creating a task. When you want to schedule Activities, to manage customer interactions, that have a particular date, time, duration, and place, create an Event.

Re-visit your Events to keep them updated with Call Report details. This could be face to face or just a phone call.

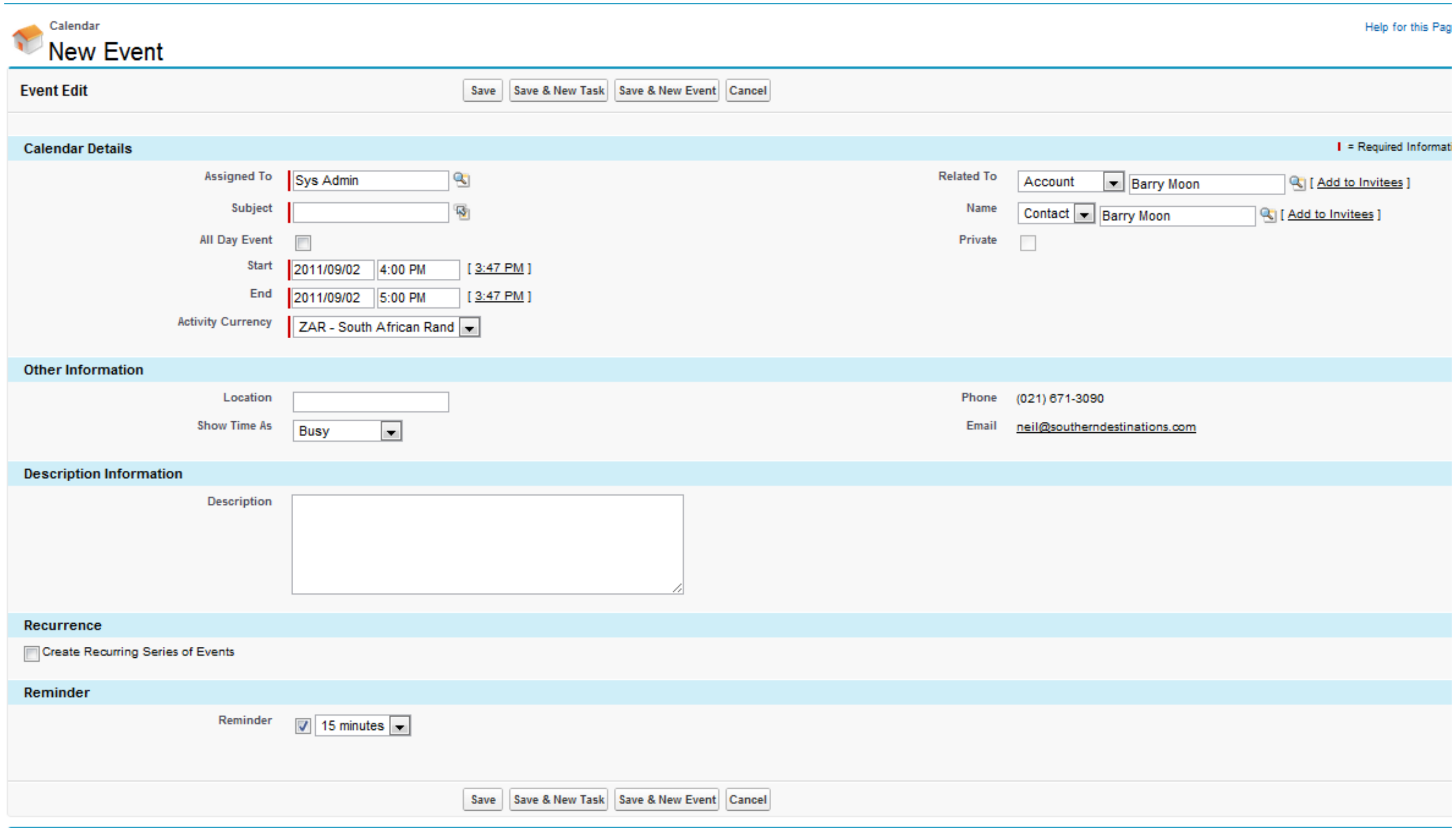


Creating an Event from the Open Activities related list

To create an Event:

Step	Action
1	Search for the account that you want to link the Event to.
2	Click the account name in the search results.

3 Click the **New Event** button in the Open Activities related list or **Save & New Event** button in an existing Activity
Note that if created from an existing Task them the Subject field is populated with the Task value



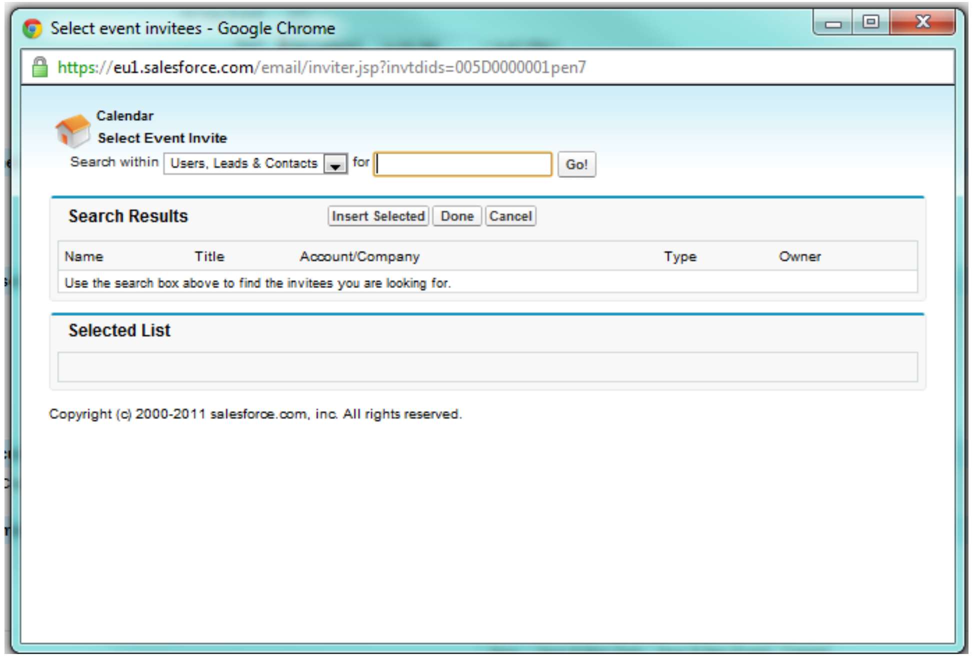
4 Enter Event details

5 To add this account to the **Add Invitees** section of the Event, click on the [Add to Invitees] link.
Other attendees are added by scrolling to the bottom of the event screen and clicking ‘add invitees’ in ‘Invite Others’ section.

6 Set yourself a reminder. This will appear as a pop-up in salesforce.com nearer the time of the event.

7 If there are no other delegates for the meeting then click the Save button.

8 To add further people to the meeting then scroll to the bottom of the form and click on the Add Invitees button.
A new window opens that allows you to choose users or accounts



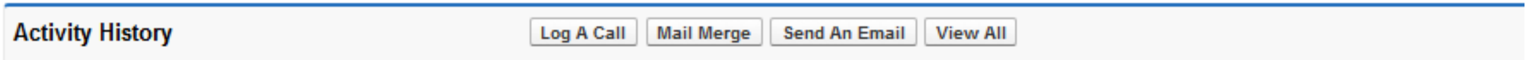
9 Tick against the names required and click on the Insert Selected button. Repeat for all invitees

10 Click on the Done button when all have been inserted

11 Click on the Save & Send Invitation to send the email to users and account.

Other Types of Activities

Though Tasks and Events are the main types of Activities, there are other specific kinds of Tasks that are created from the Activity History related list. By default, these Tasks have a Completed status and Complete by date set to the day the activity is created, because they are past actions.



Log a Call

Essentially a Task of an unplanned call. Use Log a Call after a quick telephone call to make sure you capture key details. For example, when your customer calls you, use Log a Call to record the date it took place or outcomes.

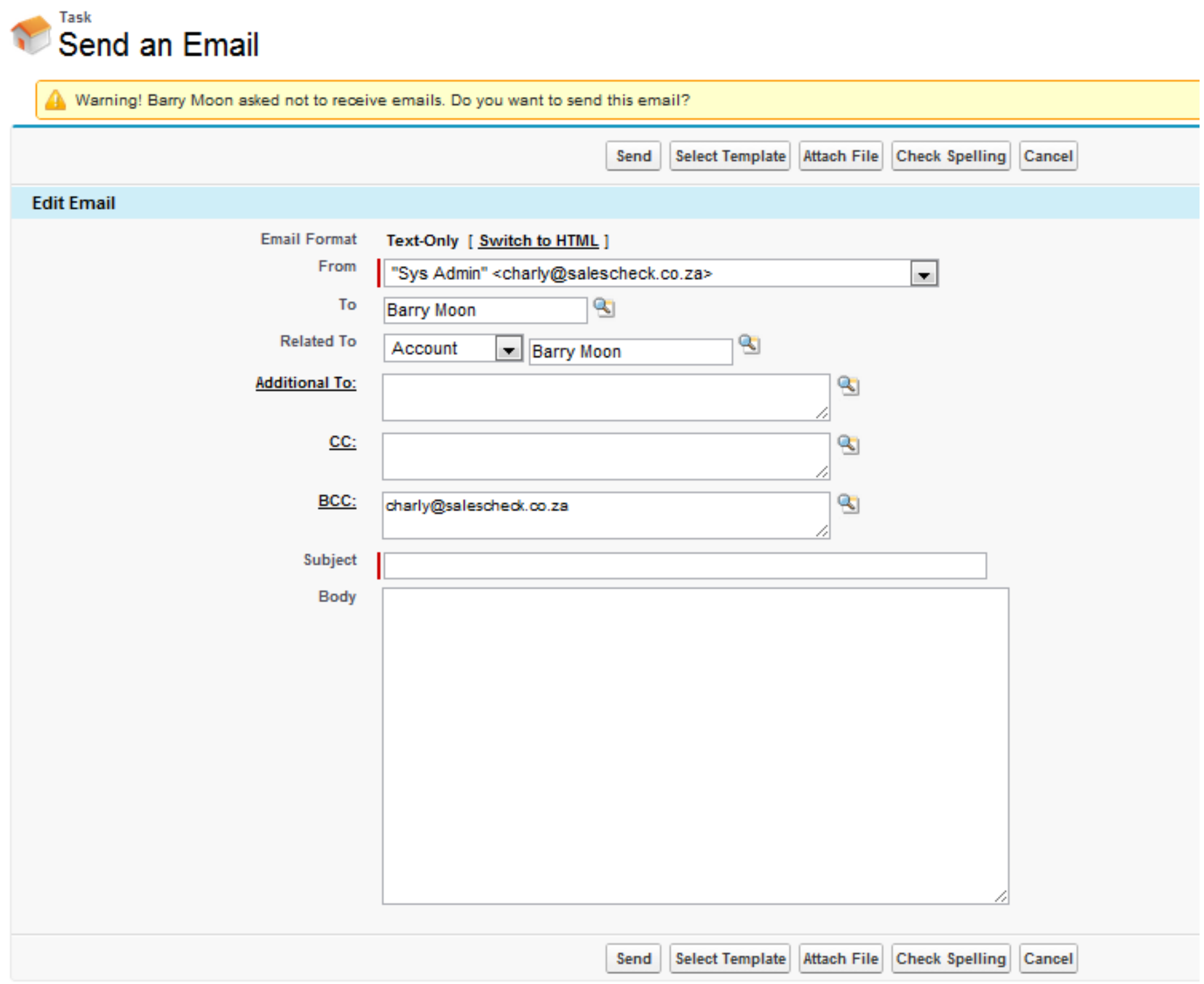
Send an Email

You can send emails to a Account directly from salesforce.com. You can use existing templates (i.e. from a previous campaign). The email is logged in the Activity History related list of the Account record you sent it from. When you ‘Send an Email’, switch to HTML so you can track the email in the HTML Status related list on the Account record.

To send an Email: switch to HTML

Step	Action
1	Search for the Account that you want to send the email to.
2	Click the Account name in the search results.
3	Click the Send An Email button in the Activity History related list

4 Complete the email form. You can also choose from a template or attach documents.



5 If necessary click **Check Spelling** to check the Body of your email.

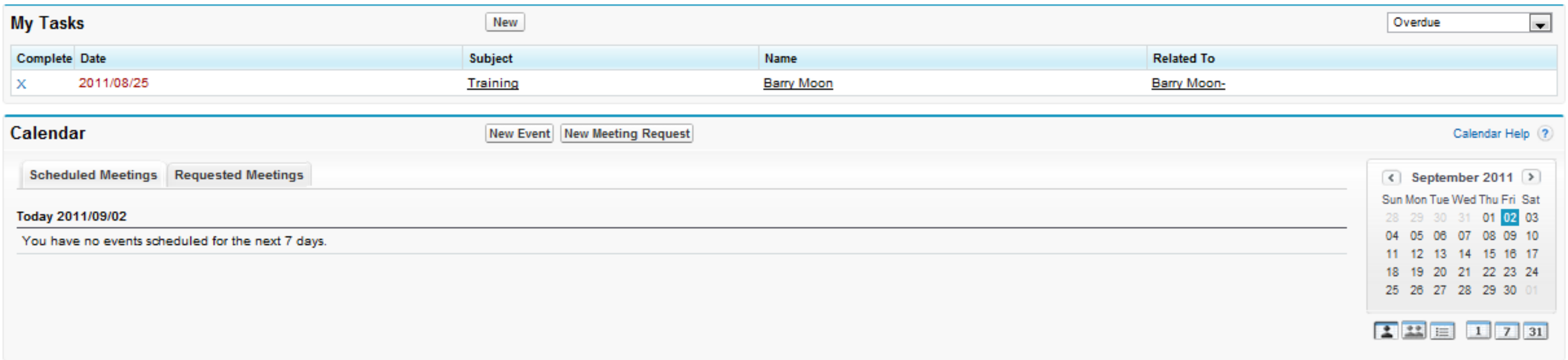
6 Click the **Save** button.

Organising and Viewing Activities

Activities can be viewed and managed from three areas within salesforce.com:

1. In an Opportunity or Accounts related list - In order to gain better context surrounding an Activity, you can view Activities from the Open Activities and Activity History related list within a, Account, Opportunity or an Account. A Task remains on the Open Activities related list until its status is changed to Completed; then the record appears on the Activity History related list. An Event, on the other hand, automatically moves from the Open Activities related list to the Activity History related list when the scheduled date and time passes. Remember you must update the Event Complete field to show 'Completed', update the Call Outcome in order for events to be picked up as completed within the reporting section

2. On the Home Page - The **My Tasks** section on the Home Page displays your to-do items. Anything in red is an overdue task. Use the drop-down list in the top-right corner of the My Tasks section to quickly re-sort your tasks based on different time frames and statuses. Be sure to change the dropdown from Overdue to All Open when you log into salesforce.com for the first time. The **Calendar** section shows all your upcoming Events in the next seven days.



My Tasks and the Calendar on the Home Page

3. In the Activity list view - Use the Activity list view to manage one consolidated list of all your Tasks and Events across Accounts. The Activity list view can be accessed from the Calendar on the Home Page.

Tying it All Together

What Activities can you create in salesforce?

Answer:

Learning Check

How long do Tasks remain on your Home Page?

A. For 30 days
B. Until the due date passes
C. Until you mark them as complete
D. Until you delete them

Answer:

What is the difference between a Task and an Event?

Answer:

True or False? If you create a Task in an Opportunity, you will see a copy of that Task in the associated Account.

Answer:

A colleague creates and assigns a Task for you to follow up with a customer who has a few questions. How can you view the details of this Task?

Answer:

Summary

By now, you should be able to:

- View, create and update Tasks, Events and Call Reports
- Create Confidential Activities

Module 6:
Reports and Dashboards

Module 6: Reports and Dashboards

Introduction

Reports and Dashboards generated from data in Salesforce.com will be used as the basis of one to ones between Sales Staff and Management teams.

With Salesforce, all users have access to the key data they need through powerful reports & dashboards. This gives clear visibility of your activities and business pipeline. From the basic search views, reports & dashboards, you have the tools to make the information work for you.

Objectives

By the end of this module, you should be able to:

- Run reports
- Change the selection criteria
- Describe the component parts of a Dashboard
- View a Dashboard

Reports

By using the Reports in salesforce, you can get REAL TIME insight into your sales, customers, and overall business. As long as you use salesforce to manage your Opportunities, and other customer-related information, you can easily consolidate and analyse this data with Reports.

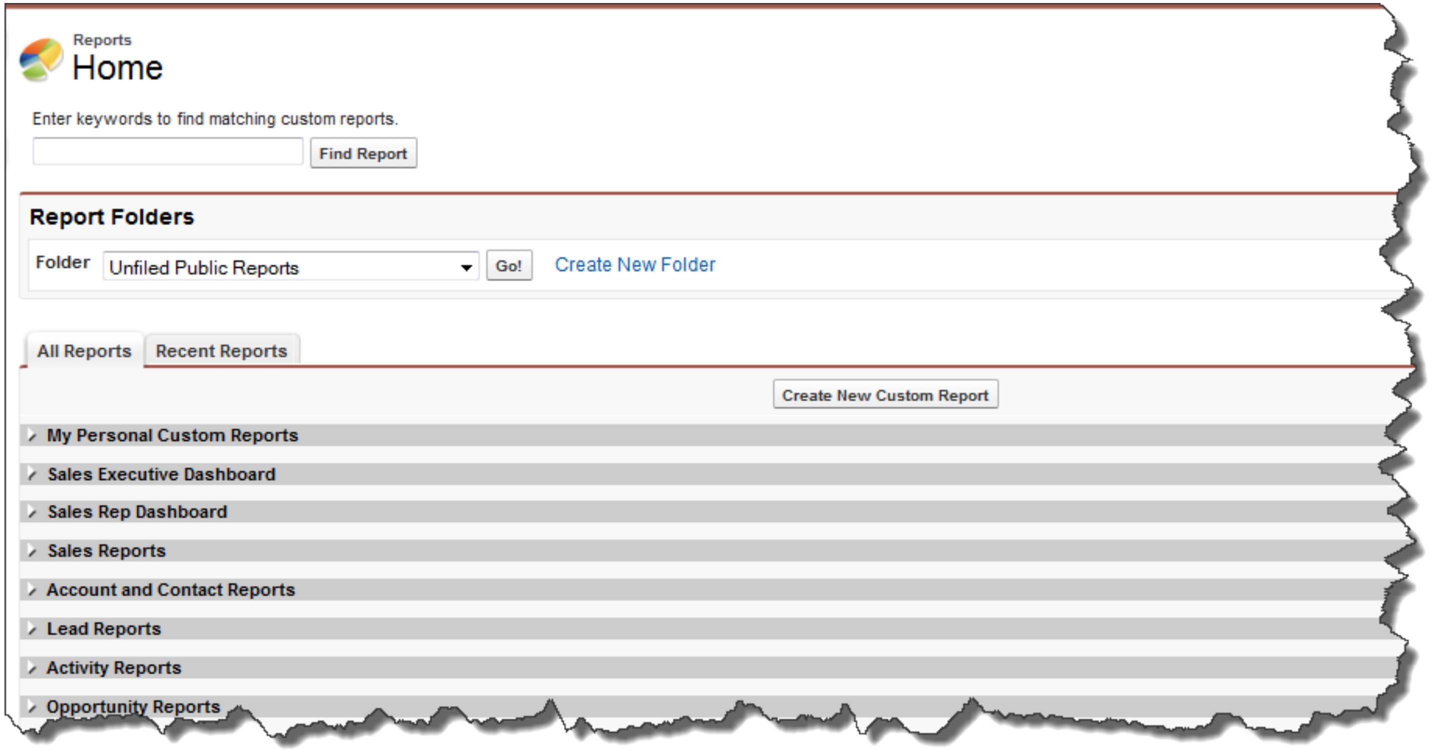
Reports will be created for you and stored in folders, however you will be able to customize these reports and create your own.

Navigating the Reports

Navigating the Reports Tab

All your Reports are accessible from the Reports Tab and are sorted by folders. On this page you can do the following:

- Click the grey arrow on the left side of the folder to hide or show a folder's Reports.
- Reorder, collapse, and expand all folders by clicking on the links at the top-right of the folder list.
- Run a Report by clicking a Report title.



The Reports tab

Running a Report

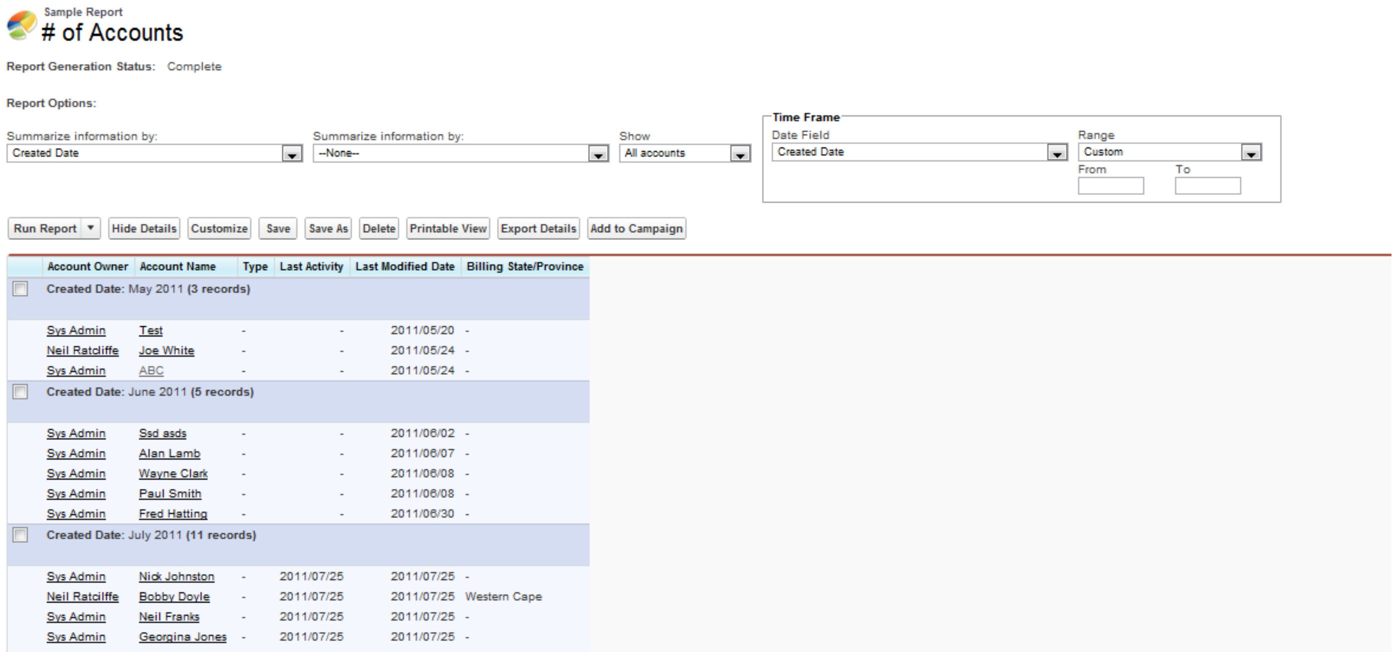
__Tip__ - Click a column heading in a Report to re-sort your Report by that column.

Running a Report

When you click a Report's name, a Report page appears based on the criteria set for the Report. Keep in mind that you can run Reports only on data to which you have access.

A Report has two parts:

1. Report options – This section is at the top of the page.
2. Generated Report – This section shows the actual report itself with the most current data in salesforce.com. What shows up in the Report depends on the criteria and what you have permission to see in salesforce.com.

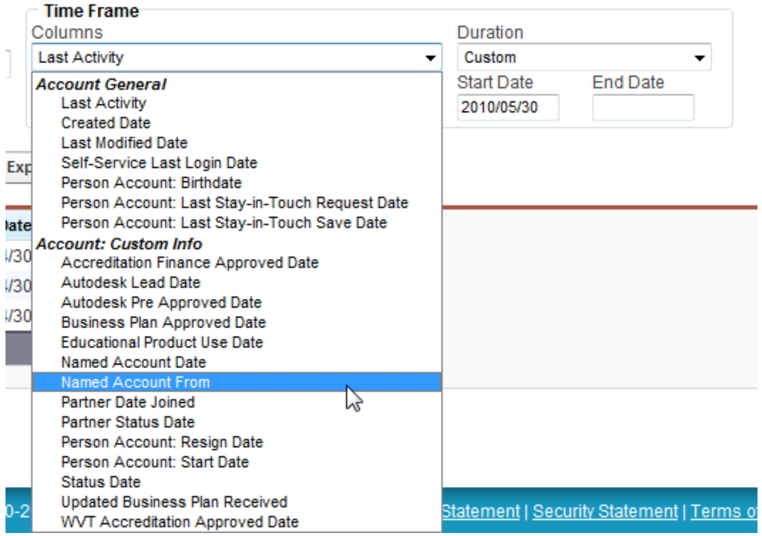


A report

You can change the date range of the report by clicking into the Time Frame section at the top of the report.

Changing the value in **Columns** allows you to choose a different date field for the selection.

Changing the value in **Duration** changes the values held in the **Start date** and **End date** fields. (you can manually enter a date range into these two fields or leave them blank for no date selection to be performed)



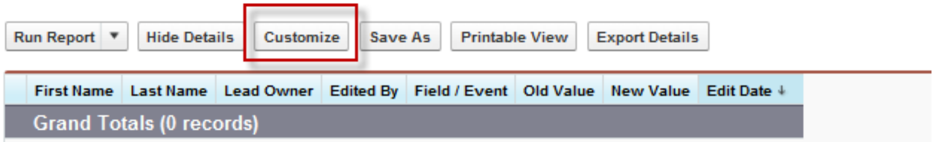
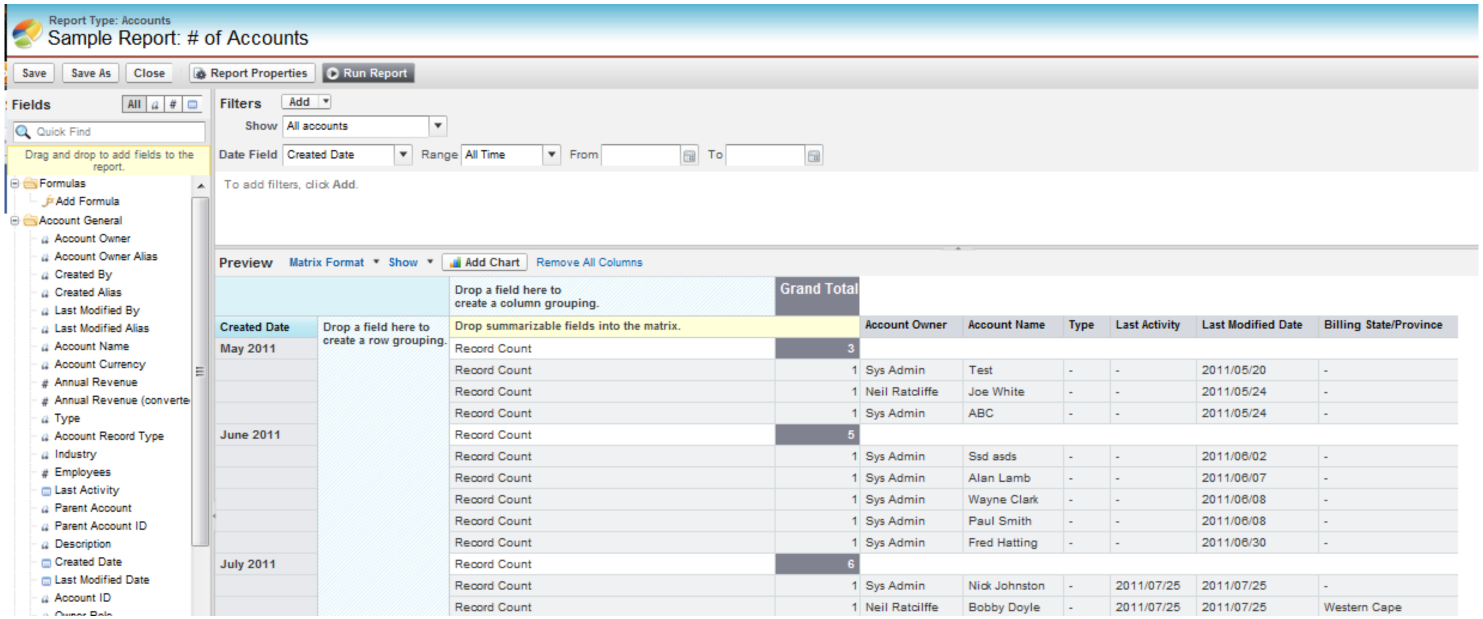
Report Buttons

Use the buttons at the top of the generated Report to hide or expand information

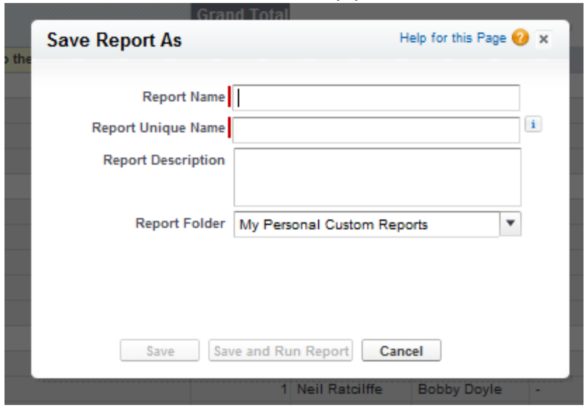
- **Run Report** – Generates a Report based on the latest data in salesforce
- **Hide/Show Details** – Expands or collapses Report details
- **Customise** – Change the criteria of your report.

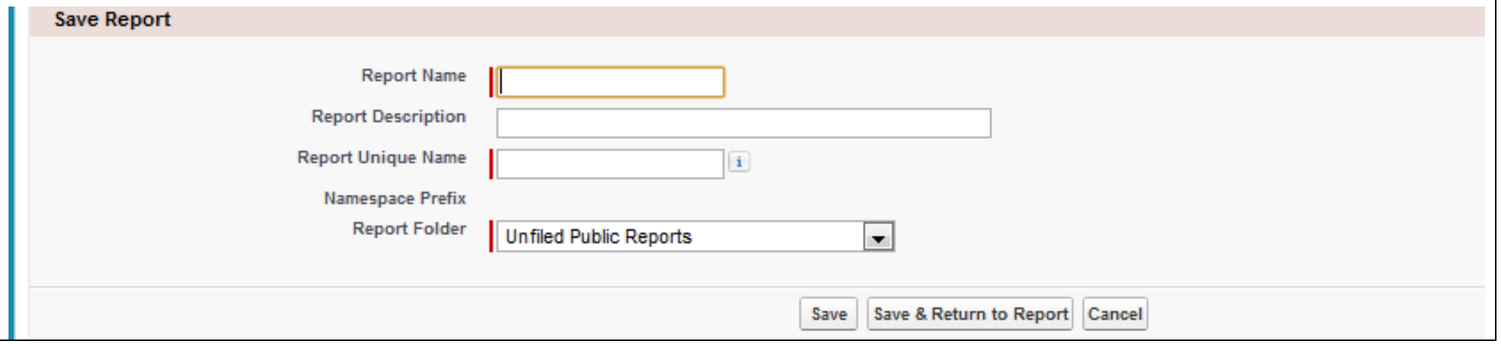
Customising a Report

You can customise any report by changing any number of options e.g. the criteria, the columns to display

Step	Action
1	Run your chosen report
2	Click the  .button You will be taken to Step 2 of the Report Wizard.
3	Click the on the Jump Step drop down to select the step where you want to make your changes  
4	Make the required changes and click on  to see the new Report data

5	Click on Save if you created the report or Save As if the report was created for you, if you wish to keep the new parameters
6	Give your report a name and save it in your Personal Custom folder. Only you will be able to view this report.





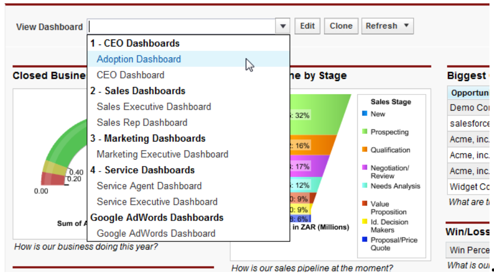
Dashboards

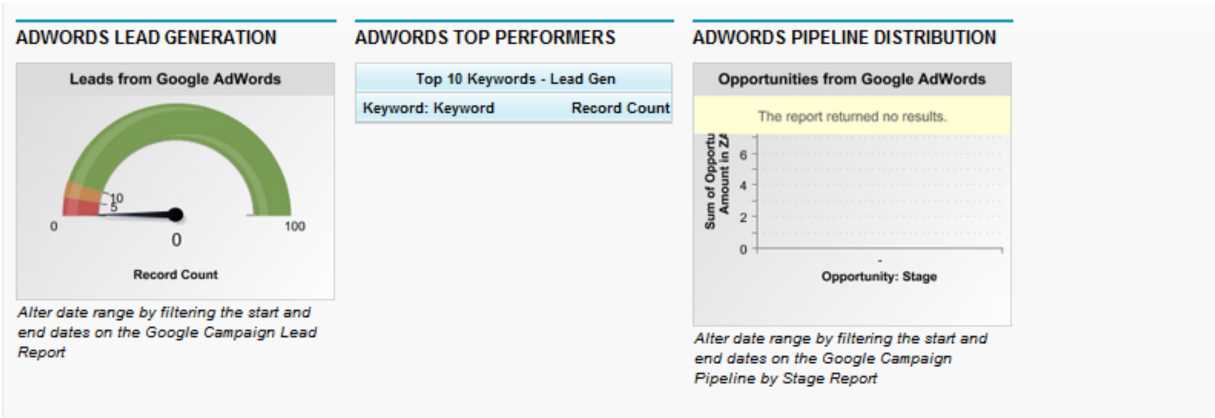
Introduction

A Dashboard is a visual representation of key business information. They show information from a maximum of 20 multiple reports Each report creates one component on the Dashboards and uses Custom Reports as source

The dashboard home page, like reports is different to all other object home pages. Here you can select the dashboard you wish to view.

Just click on the View dashboard menu





Dashboards do not automatically refresh when you view them although some will be scheduled to refresh regularly e.g. once a day/once a week. Always check the last runtime on the top right of the screen

To view up to date information click on 

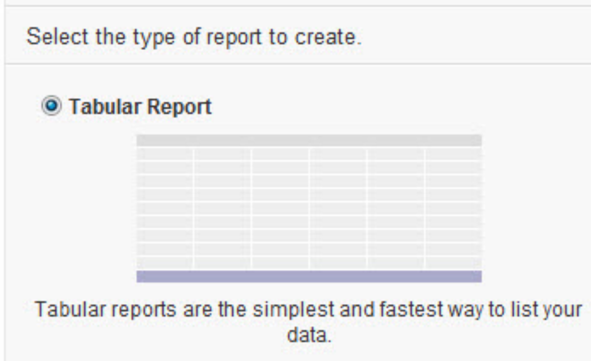
The reports will run automatically and update the results on your dashboard.

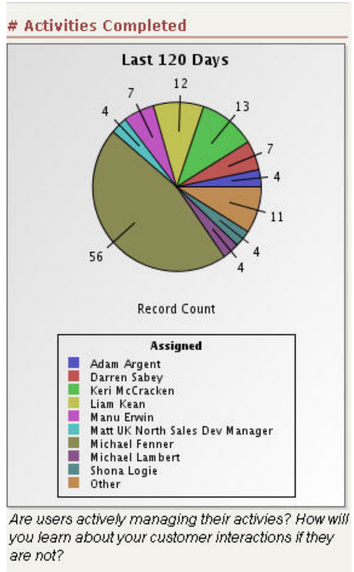
Dashboard Components

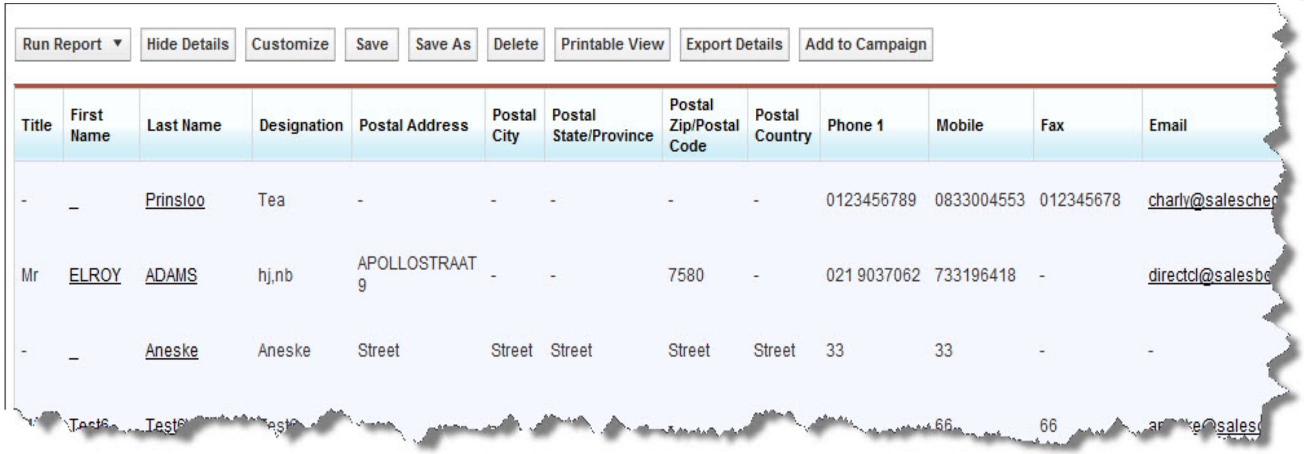
Each component can be different, depending on the data you wish to extract from the report.

Chart: Graphical representation of report results

Table: A listing of the top or bottom records from a report



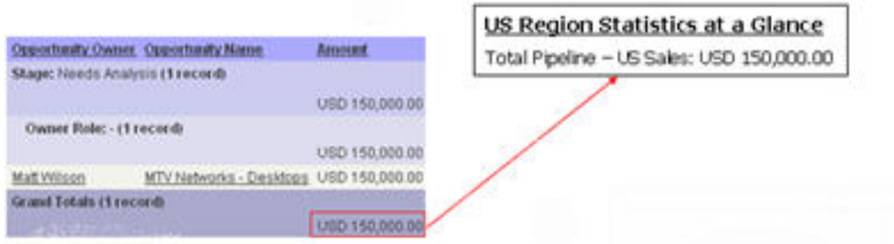




Title	First Name	Last Name	Designation	Postal Address	Postal City	Postal State/Province	Postal Zip/Postal Code	Postal Country	Phone 1	Mobile	Fax	Email
-	_	Prinsloo	Tea	-	-	-	-	-	0123456789	0833004553	012345678	charly@salesche
Mr	ELROY	ADAMS	hj,nb	APOLLOSTRAAT 9	-	-	7580	-	021 9037062	733196418	-	directcl@salesbc
-	_	Aneske	Aneske	Street	Street	Street	Street	Street	33	33	-	-

Gauge: A single data value – displayed as a point on a defined spectrum – drawn from the Grand Total of a report

Metric: A single data value – drawn from the Grand Total of a report


Opportunity Owner
Opportunity Name
Amount
Stage: Needs Analysis (1 record)
USD 150,000.00
Owner Role: - (1 record)
USD 150,000.00
Matt Wilson
MTV Networks - Desktops
USD 150,000.00
Grand Totals (1 record)
USD 150,000.00
US Region Statistics at a Glance
Total Pipeline – US Sales: USD 150,000.00

Tying It All Together

You have a meeting Monday to discuss what's in the opportunity pipeline.

What would you do in salesforce?

Answer:

Learning Check

How can you change the date range on a report?
Answer:

List the 4 different components in a Dashboard
Answer:

Do recently run Reports appear in the Sidebar? If not how can I quickly access them?
Answer:

Summary

By now, you should be able to:

- Run a Report
- Customise a report
- Create a new custom report
- Describe what a dashboard is
- View a dashboard