



# **Contacts and Accounts Job Aid**

Service Request Management

Release 2

# SRM Contacts & Accounts Job Aid

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### Document purpose:

This job aid defines the concept of contacts and accounts in Salesforce.com and how to search, create and link a contact and account to a project.

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# Contacts and Accounts in Salesforce

## What is a Contact and Account?



Before going into how to search for contacts and accounts in Salesforce.com, let's go over what they are and how they are created in the system.

	Contact	Account
Definition	<p>An individual that belongs to an Account and their associated details, such as first and last names, address, contact number, and privacy preferences.</p> <p>There are three contact record types:</p> <ul style="list-style-type: none"><li>• A customer contact is an individual associated to an account that buys from HP.</li><li>• A partner would be a contact from an account that partners with HP in selling.</li><li>• The Resource contact record type is used for internal HP users because everyone needs a contact record to be assigned to project sub-tasks as a resource.</li></ul>	<p>A record representing a customer with associated details, such as:</p> <ul style="list-style-type: none"><li>• Industry</li><li>• Region</li><li>• Number of employees</li><li>• Address</li><li>• Partners</li></ul> <p>The relevant account should have the official sold to account address and not the ship-to or delivery address.</p>
Purpose in relation to Project Management	<p>Customer contacts are listed as the main contact person for a project, task of sub-task.</p> <p>Resource contacts are assigned to sub-tasks.</p>	<p>To indicate the customer related to the project delivery.</p>
How they are Created	<p>Customer and Partner contacts can be manually created from their associated account.</p> <p>Resource contacts are created by the support team when users are set up in Salesforce.com.</p>	<p>Account are created in Salesforce from Master Data. Typically there is one account record per country that the customer operates in, but there are some exceptions.</p> <p>You can raise a request to the support team to have a new account record created if the needed one is not found.</p>



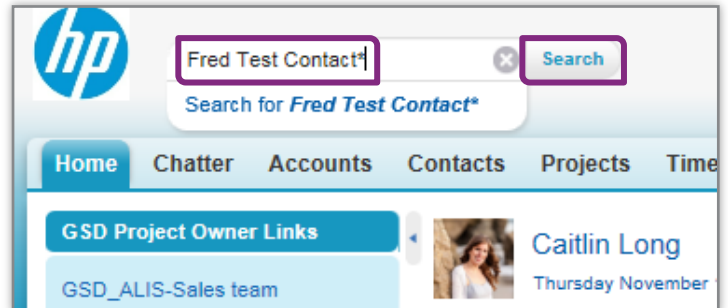
# Contacts and Accounts in Salesforce

## Searching for an existing contact



### Using Global Search:

- 1 Enter keywords in the Global Search field such as an email or name.
- 2 Click **Search**.
- 3 Scroll to the **Contacts** section or click the **Contacts** link from the left bar.
- 4 Click on the contact's name in the results to open the record.



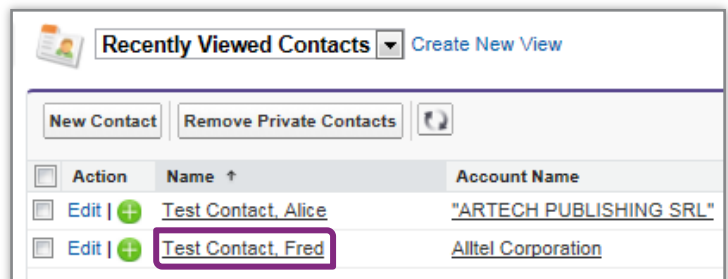
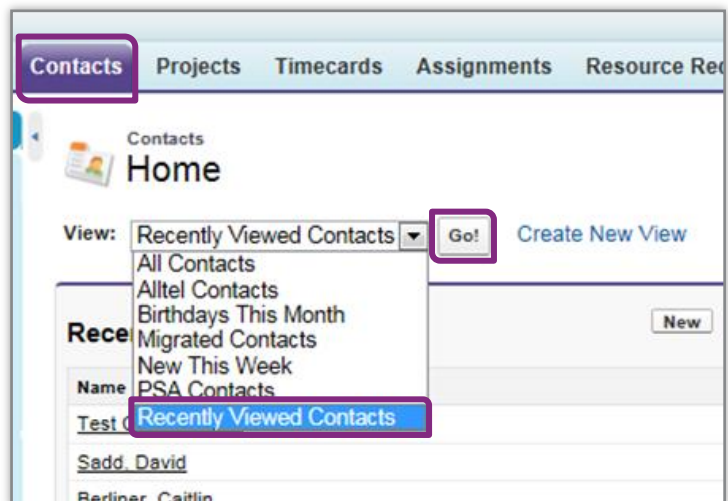
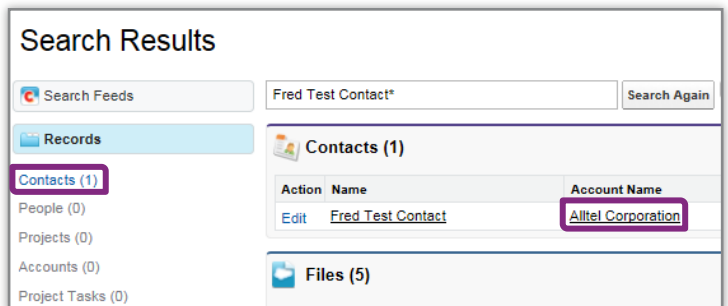
### Selecting or creating a list view:

- 1 Go to the **Contacts** tab.
- 2 On the homepage, select a view such as **All Contacts** or **Recently Viewed Contacts** from the **View** drop down and click **Go**.



**TIP:** You can also create a customized view by clicking the **Create New View** link and specifying filtering criteria. For example, you could create a list view for all contacts in a specific Mailing Country or for a specific Account or Record Type.

- 3 Click on the contact name from the displayed list.



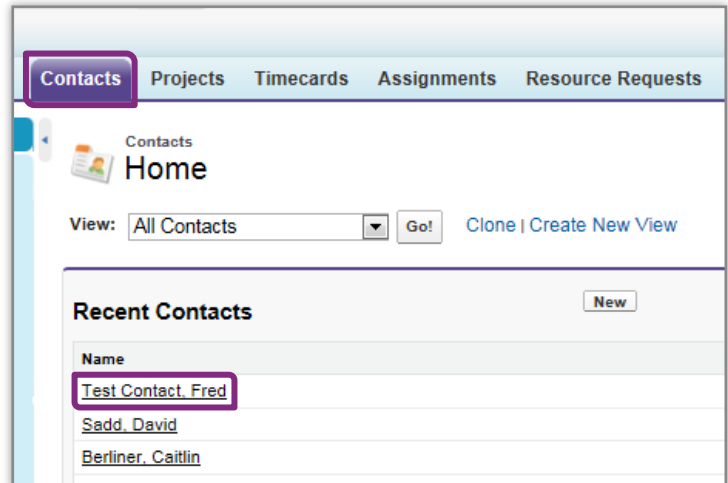
# Contacts and Accounts in Salesforce

## Searching for an existing contact (cont.)



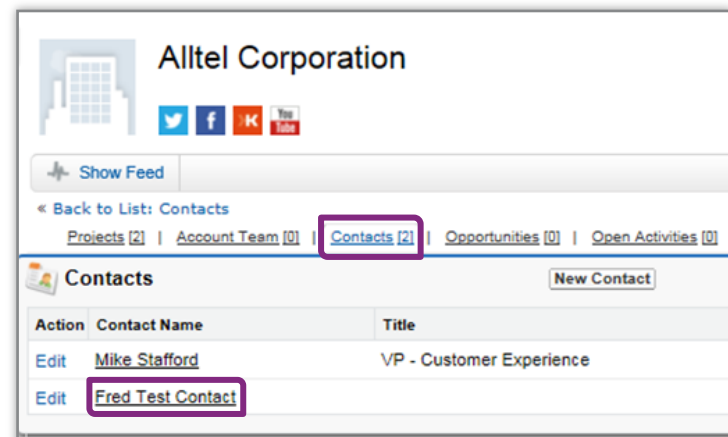
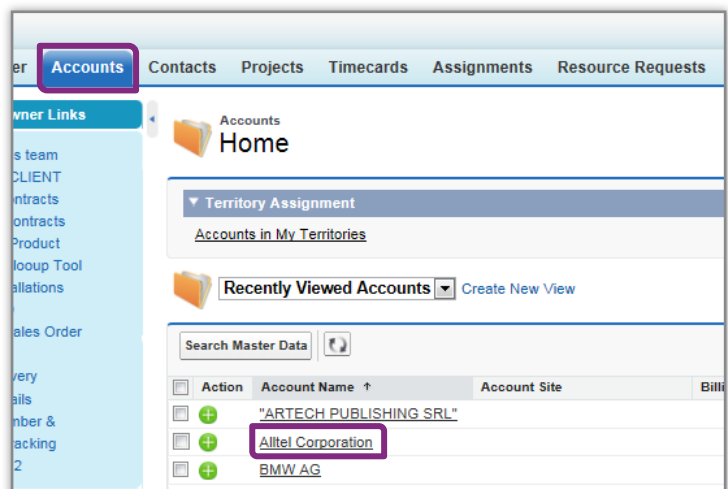
### From the Recent Contacts list:

- 1 Go to the **Contacts** tab and the last 25 contact records you have viewed will be displayed in the **Recent Contacts** section.
- 2 Click on the desired contact name to open the record.



### From an Account record:

- 1 To see all contacts that belong to an account, open the account record by searching in global search or going to the **Accounts** tab.
- 2 Click on the account name to open the record.
- 3 On the account page, go to the **Contacts** related list to view all contacts for the selected account.



# Contacts and Accounts in Salesforce



## Viewing and understanding a contact record

1 When you open a contact record, look at the **Contact Record Type** to see if it is a **Customer** or a **Resource** meaning that it is an HP employee set up in Salesforce to be assigned to sub-tasks.

2 The information on a Resource contact is how available resources are filtered when assigning a resource to a sub-task. You can see their assigned:

- **Resource Role**
- **Geo**
- **Practice**

3 These values are the ones you select as filters when assigning a resource.

Contact Detail		Edit	Clone	Reso
▼ Resource Information				
Name	Caitlin Berliner			
Work Phone				
Email	caitlin.berliner@hp.com.test22			
Is Resource	<input checked="" type="checkbox"/>			
Is Resource Active	<input checked="" type="checkbox"/>			
Contact Record Type	Resource	Change		
Created By	Tyler Eline, 7/29/2014 12:22 AM			

Salesforce User	Caitlin Berliner
Account Name	GSD Account AMS
Resource Role	Account Support Manager (ASM)
Geo	Global
Practice	Global
Work Calendar	US Standard
Last Modified By	GSD SRM Master Admin, 11/5/2014 3:50 AM

Only Active resources are shown. Results are narrowed down based on Role, Region, Practice and Name. Setting at least one filter is required. Search results are limited to 1000 records

Geo	Practice	Role	Resource Name
Global	Global	Account Support Manager (ASM)	

Go! Back

Name	Region	Role	Practice
Shanmukh Bhadrashetty	United States (Country)	Account Support Manager (ASM)	Technical Services
Kyle Morton	United States (Country)	Account Support Manager (ASM)	Technical Services



# Contacts and Accounts in Salesforce



## Creating a new contact from an existing account

★ **Best Practice:** Before creating a new contact, perform a thorough search to ensure the contact does not already exist in Salesforce so duplicates are not created.

- 1 From a project page, click the **Account** hyperlink to open the account page. Alternatively, go to the **Accounts** tab or use global search to find the desired account.

The screenshot shows the Salesforce interface for a project named 'Us - Alltel - SO12345'. The 'Accounts' tab is highlighted in the top navigation bar. On the left sidebar, the 'Project Owner Links' section is visible. The main content area shows the project details, including the project name, ID, and friendly name. The 'Project Overview' section is expanded, showing the project name, ID, and friendly name. The 'Account' field is highlighted with a red box, showing 'Alltel Corporation'.

- 2 From the account page, go to the **Contacts** related list.

- 3 Click the **New Contact** button.

The screenshot shows the Salesforce account page for 'Alltel Corporation'. The 'Contacts' related list is highlighted with a red box. The 'New Contact' button is also highlighted with a red box. The 'Contacts' list shows two contacts: 'Mike Stafford' (VP - Customer Experience) and 'Fred Test Contact'.

- 4 Select the type of contact you want to create: Customer, Partner, or Resource.

! **NOTE:** Typically you will be creating customer contacts. Refer to the table on page 3 to see a definition of each record type.

The screenshot shows the 'Select Contact Record Type' dialog box. The 'Record Type of new record' field is highlighted with a red box, showing a dropdown menu with options: 'Customer', 'Partner', and 'Resource'. The 'Continue' and 'Cancel' buttons are visible at the bottom right.



# Contacts and Accounts in Salesforce

## *Creating a new contact from an existing account (cont.)*



**5** Enter the mandatory information and any other details you know about the individual on the **Contact Edit** page.

**NOTE:** You will see that the account name and few other details are already prepopulated for you because you created the contact from an account.

**6** Click **Save** to create the contact.

**NOTE:** You will see a **New** button on the **Contacts** homepage, but we do not recommend using it. With this method the account and other data will not be pre-populated for you which could result in associating an incorrect account.





# Contacts and Accounts in Salesforce

## Adding a contact to a project, task, or sub-task




1 Open the project, task, or sub-task page where you want to add a contact.

2 Scroll to the **Customers and Order Details** section.

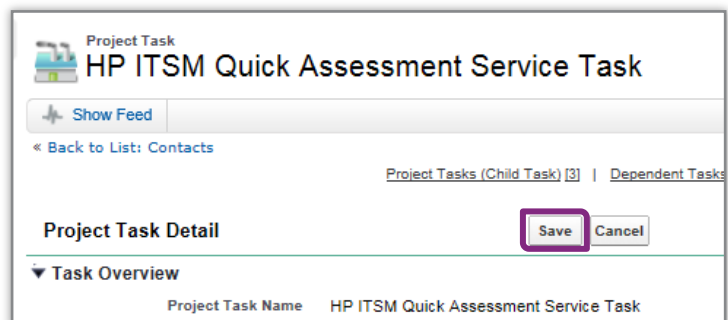
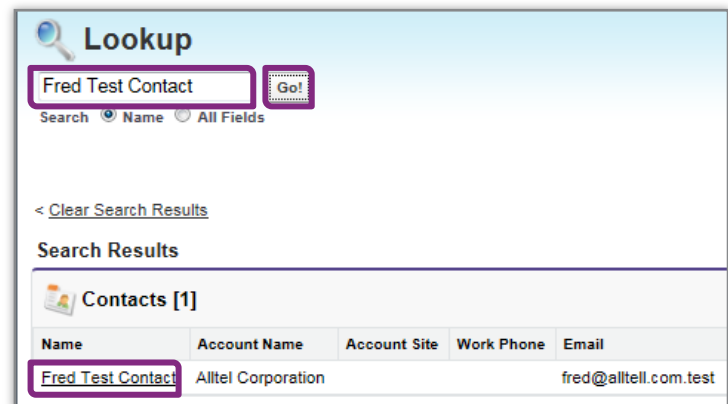
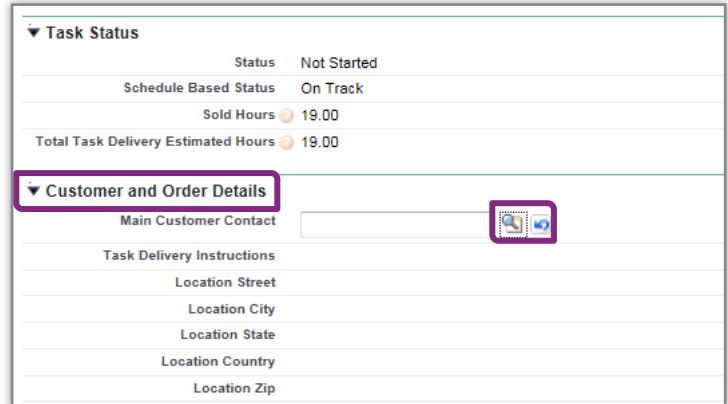
3 Double-click the **Main Customer Contact** field and click the look up icon.

4 In the **Lookup** window, enter the keywords to search for the contact and click **Go**.

 **TIP:** You can use wildcards to refine your search.

5 From the search results, click the contact you want to open.

6 Click **Save** on the project, task, or sub-task page.




# Contacts and Accounts in Salesforce

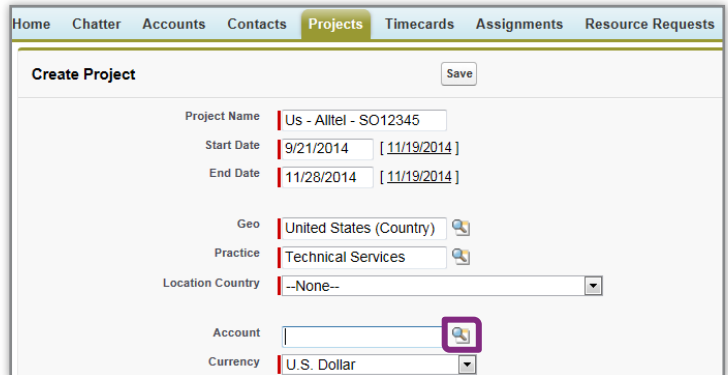
## Linking an account to a project



- 1 To add an account to a project record, click on the **lookup icon** when creating a new project or when editing an existing one.
- 2 A new window will open displaying your recently viewed accounts. Enter in your search criteria.
- 3 To only search for matches to the account name, select the **Name** radio button.
- 4 To search for another value on an account record, like if you know a unique ID (i.e. MDCP ID or AMID), select the **All Fields** radio button.
- 5 Typically, there will be an account record for each **Physical Country** the customer operates in. Click on the account with the sold to, not ship to, country for the project.
- 6 If there are multiple accounts from the same country, you can look at the **Physical Street** to help determine the best match.

 **TIP:** Check with your Sales Account manager or view the Account Address on the original order if in doubt on the correct account address.

- 7 If you still cannot find the right account, use **Global Search** or search through **Master Data** because there are more filtering options that can help *(covered on the next page)*.




Home Chatter Accounts Contacts **Projects** Timecards Assignments Resource Requests


Create Project Save

Project Name Us - Alltel - SO12345


Start Date 9/21/2014 [ 11/19/2014 ]

End Date 11/28/2014 [ 11/19/2014 ]

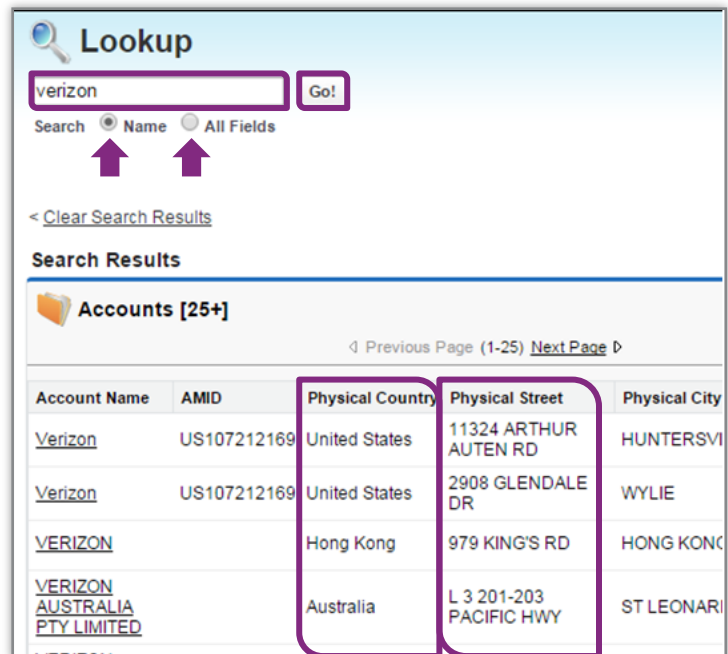
Geo United States (Country) 

Practice Technical Services 

Location Country --None--

Account 

Currency U.S. Dollar




Lookup

verizon Go!

Search ☒ Name ☐ All Fields

< Clear Search Results

Search Results

 Accounts [25+]

< Previous Page (1-25) Next Page >

Account Name	AMID	Physical Country	Physical Street	Physical City
<a href="#">Verizon</a>	US107212169	United States	11324 ARTHUR AUTEN RD	HUNTERSVI
<a href="#">Verizon</a>	US107212169	United States	2908 GLENDALE DR	WYLIE
<a href="#">VERIZON</a>		Hong Kong	979 KING'S RD	HONG KONG
<a href="#">VERIZON AUSTRALIA PTY LIMITED</a>		Australia	L 3 201-203 PACIFIC HWY	ST LEONARD



# Contacts and Accounts in Salesforce

*Searching for an existing account using Global Search*



1 Enter any keywords you know into the **Global Search** field such as the Account Name, AMID, or Tax Identifier.

2 Click **Search**.

3 Scroll to the **Accounts** section or click the **Accounts** link from the left bar.

4 You can click **Show Filters** to apply further filters if too many results are returned.

Search Results

Search Feeds Alltel Corporation\* Search Again

Records

People (0)

Accounts (1) [Show Filters](#)

Leads (5)

Action	Account Name	Account Record Type	Business Relationship
<a href="#">Edit</a>	Alltel Corporation	Customer	Customer

5 Enter any additional values you know and click **Apply Filters**.

6 When found, click on the **Account Name** from the search results to open the record.

Alltel Corporation\* Search Accounts Options...

Accounts (1) [Hide Filters](#) [My Columns](#)

AMID 01234 Account Name Alltel Account Record Type Customer

Physical Street 1 Allied Dr. Physical City Little Rock Physical State/Province Arkansas

Physical Country USA HP SFDC Access Location ID

[Apply Filters](#) [Search Filters Help](#)

Action	Account Name	Account Record Type	Business Relationship	Physical Street	Physical City	Physical State/Province	Physical Country	MDCP Organization ID	Site DUNS	AMID
<a href="#">Edit</a>	Alltel Corporation	Customer	Customer	1 ALLIED DR	LITTLE ROCK	Arkansas	United States	49256240		



# Contacts and Accounts in Salesforce

## Searching for an existing account in Master Data



1 If you cannot find an account through global search, you can search through Master Data to see a listing of accounts both inside Salesforce and those that are in Master Data. Go to the **Accounts** tab.

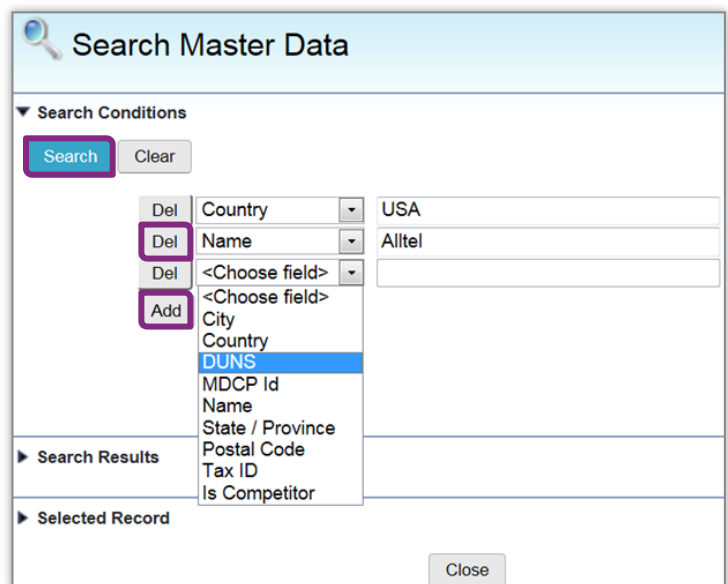
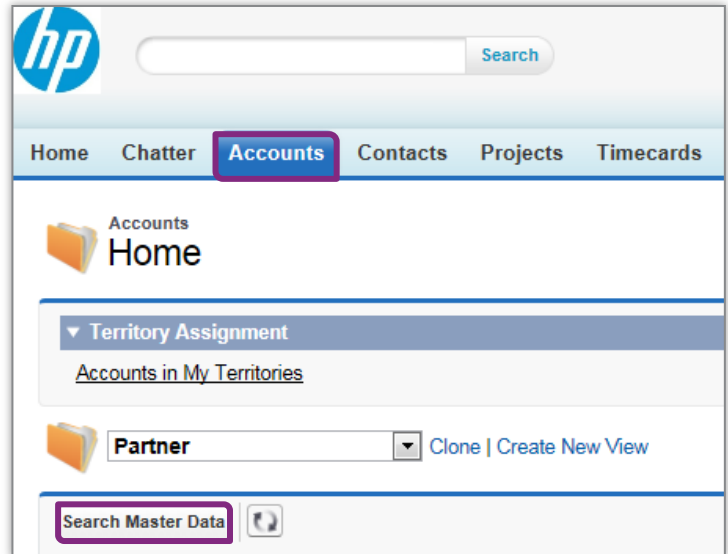
2 Click the **Search Master Data** button.

3 In the separate window that displays, enter the search criteria, such as city, country, or name.

4 Click the **Add** button if you want to add more rows to specify the search criteria, or click the **Del** button if you want to delete a row.

**NOTE:** At least one of the following must be specified as the search criteria: Name, Tax, MDCP ID, or DUNS.

5 Click the **Search** button.



# Contacts and Accounts in Salesforce

## Searching for an existing account in Master Data (cont.)



- 6** The result appears in the **Search Results** section. Click on an account name to see the record's details.

**Search Master Data**

▼ Search Conditions

Search Clear

Del Name Landon

Del State / Province Oklahoma

Add

▼ Search Results

Found 26 records

Name	Non-Latin Name	Address	City	City Region	State	Country	MDCP Id	DUNS
Landon Landon Investment		6251 SROCK CR...	TISHOMINGO		Oklahoma	United States	98674965	827232260
Landon Brooks			LAVERNE		Oklahoma	United States	13656053	150518913



**TIP:** You can filter the columns by clicking on them.

- 7** The selected account details will appear in the **Selected Record** section.

- 8a** If the selected account IS set up in Salesforce, you will see a **View in SFDC** button and when clicked will open the selected account record in Salesforce.

- 8b** If the selected account is NOT set up in Salesforce, you will see a message, "Selected record does not exist in SFDC." You can submit a case to have the account created by clicking **Create Case**.

CVS Caremark Corporation	315 BRD ST	CUMBER...	Rhode
CVS Caremark Corporation	11 BLACKSTON...	LINCOLN	Rhode
CVS Caremark Corporation	1 CVS DR	WOONS...	Rhode

Select a record from the list. If you do not find a suitable account you may close this window and

**Selected Record**

The account exists in SFDC. Click View in SFDC button to see account details.

**View In SFDC**

Name CVS Caremark Corporation

Street 1 CVS DR

City WOONSOCKET

City Region

Reporting Name

State Rhode Island

**Selected Record**

Selected record does not exist in SFDC.

**Create Case**

Name CVS Pharmacy Inc.

Street 1675 HOLLENBECK AVE

City SUNNYVALE

- 9** You will see a "success" message saying that a case has been submitted and you will receive an email when the account is created.

