Contacts and Accounts Job Aid

Service Request Management

Release 2

SRM Contacts & Accounts Job Aid

Table of contents

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.

Table of contents:

Click on a topic to jump to the desired section.

What is a Contact and Account?

Contacts

- **Search for an existing contact**
  - Using Global Search
  - Selecting or creating a list view
  - From the Recent Contacts list
  - From an Account record
- **Viewing and understanding a contact record**
- **Creating a new contact from an existing account**
- **Adding a contact to a project, task, or sub-task**

Accounts

- **Linking an account to a project**
- **Searching for an account using Global Search**
- **Searching for an account in Master Data**

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	An individual that belongs to an Account and their associated details, such as first and last names, address, contact number, and privacy preferences. There are three contact record types: • A customer contact is an individual associated to an account that buys from HP. • A partner would be a contact from an account that partners with HP in selling. • 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.	A record representing a customer with associated details, such as: • Industry • Region • Number of employees • Address • Partners The relevant account should have the official sold to account address and not the ship-to or delivery address.
Purpose in relation to Project Management	Customer contacts are listed as the main contact person for a project, task of sub-task. Resource contacts are assigned to sub-tasks.	To indicate the customer related to the project delivery.
How they are Created	Customer and Partner contacts can be manually created from their associated account. Resource contacts are created by the support team when users are set up in Salesforce.com.	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. You can raise a request to the support team to have a new account record created if the needed one is not found.

Contacts and Accounts in Salesforce

Searching for an existing contact

Using Global Search:

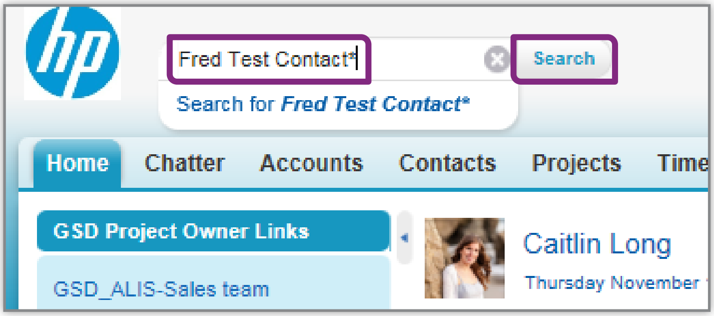
1. Enter keywords in the Global Search field such as an email or name.
2. Click **Search.**
3. Scroll to the **Contacts** section or click the **Contacts** link from the left bar.
4. Click on the contact's name in the results to open the record.

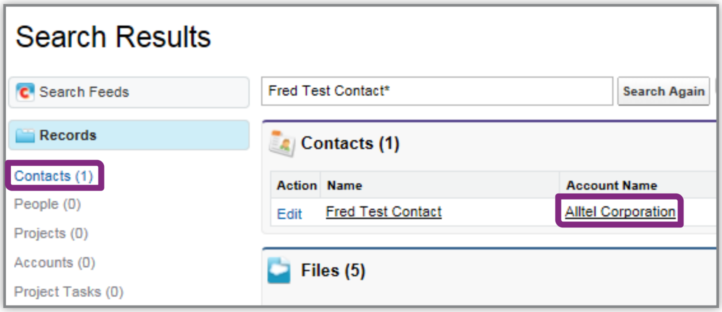
Selecting or creating a list view:

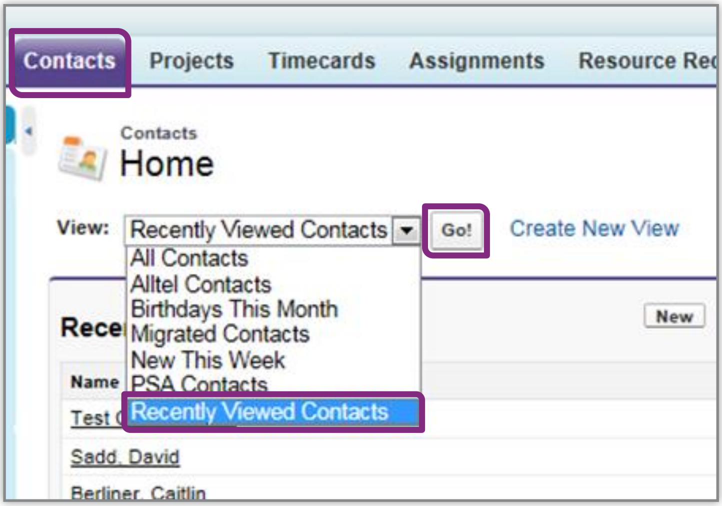
1. Go to the **Contacts** tab.
2. On the homepage, select a view such as **All Contacts** or **Recently Viewed Contacts** from the **View** drop down and click **Go.**

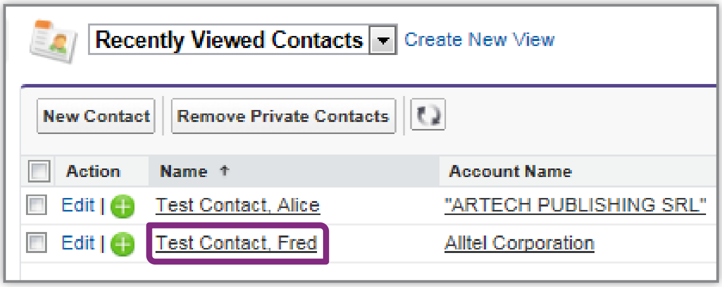
TIP: You can also create a customized view by clicking the **Create New View** link and specifying filtering criteria. For example, you could create a list view for all contacts in a specific Mailing Country or for a specific Account or Record Type.

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







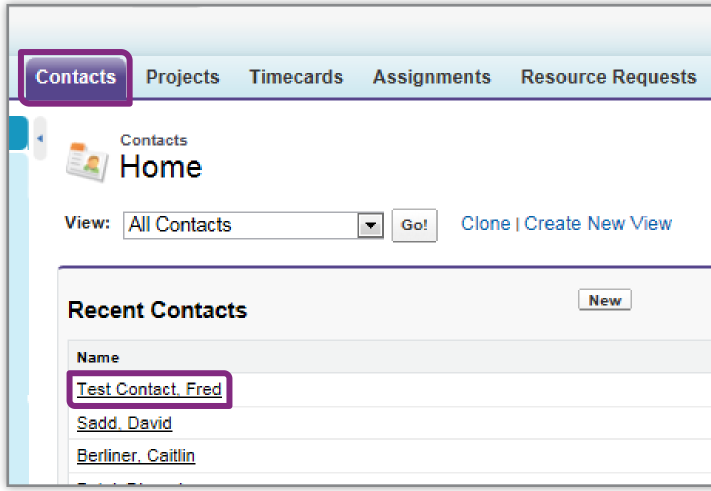


Contacts and Accounts in Salesforce

Searching for an existing contact (cont.)

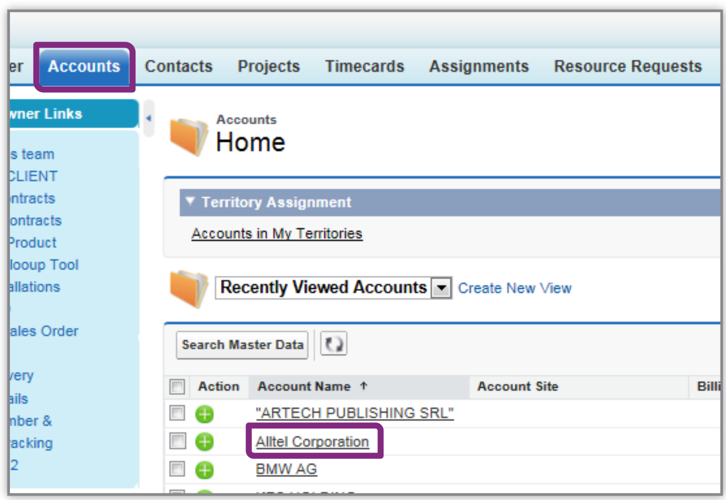
From the Recent Contacts list:

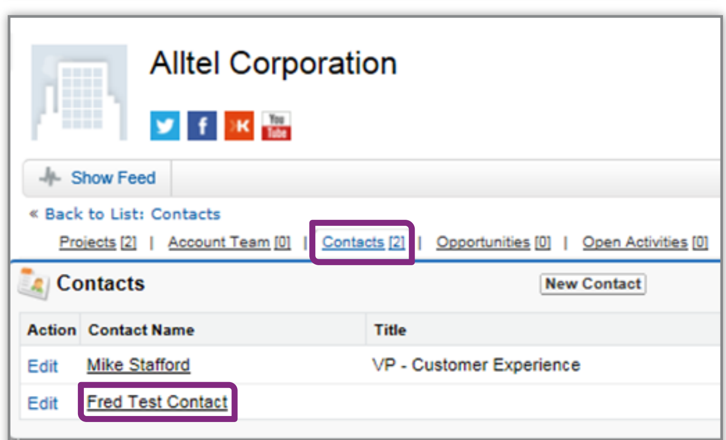
1. Go to the **Contacts** tab and the last 25 contact records you have viewed will be displayed in the **Recent Contacts** section.
2. Click on the desired contact name to open the record.



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.

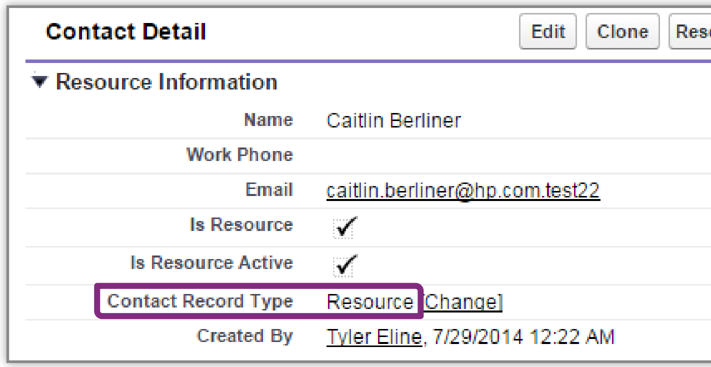




Contacts and Accounts in Salesforce

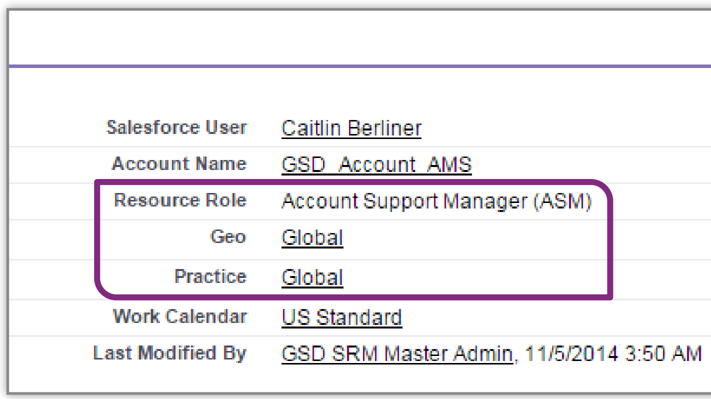
Viewing and understanding a contact record

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.

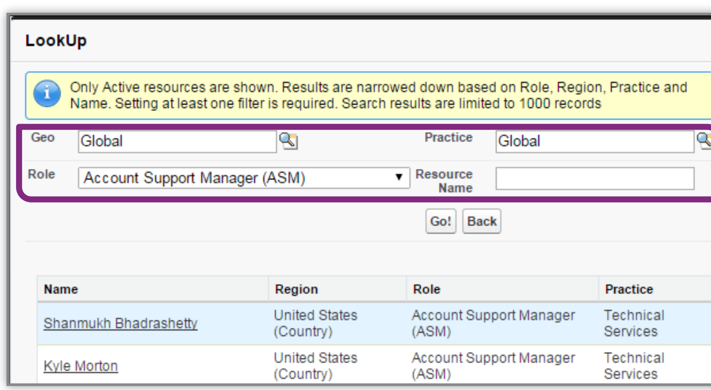


2 The information on a Resource contact is how available resources are filtered when assigning a resource to a sub-task. You can see their assigned:

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



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

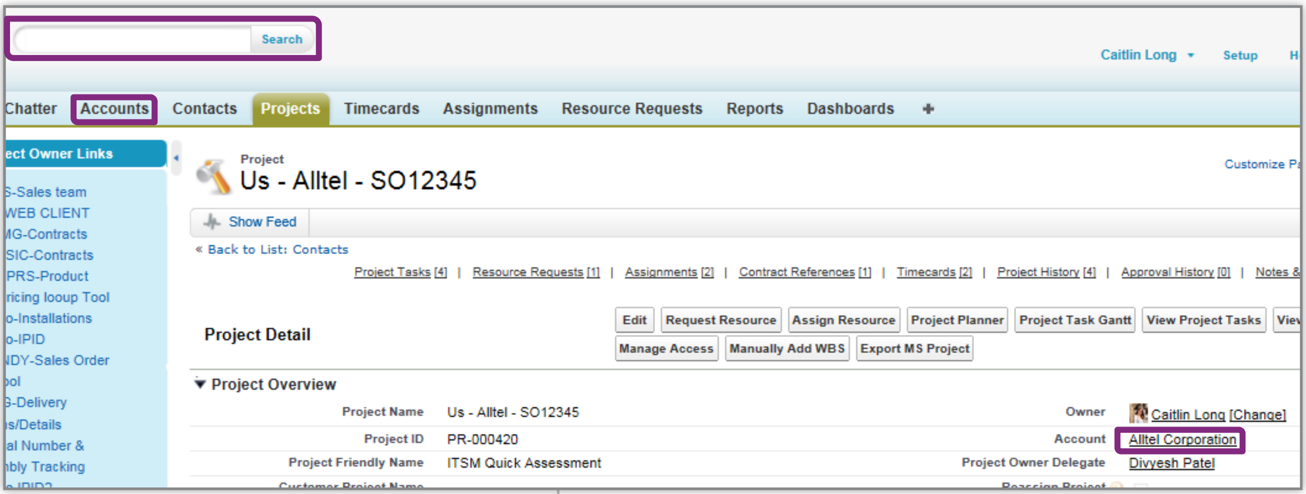


Contacts and Accounts in Salesforce

Creating a new contact from an existing account

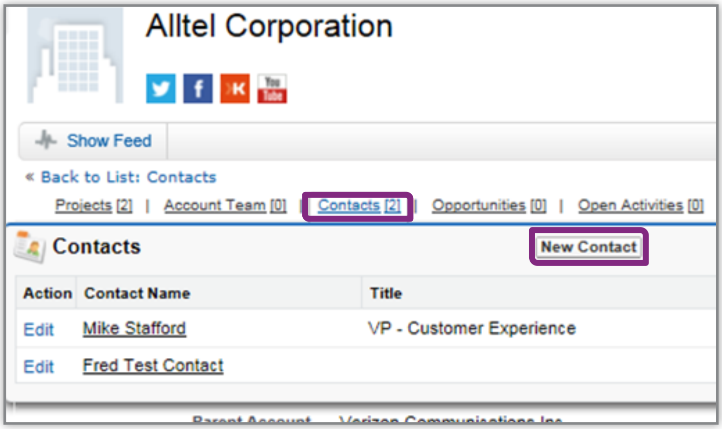
Best Practice: Before creating a new contact, perform a thorough search to ensure the contact does not already exist in Salesforce so duplicates are not created.

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.

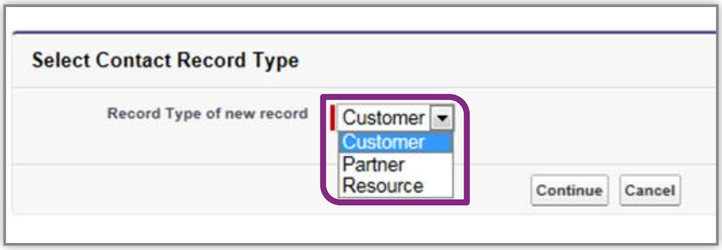


2. From the account page, go to the **Contacts** related list.

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



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.

Contacts and Accounts in Salesforce

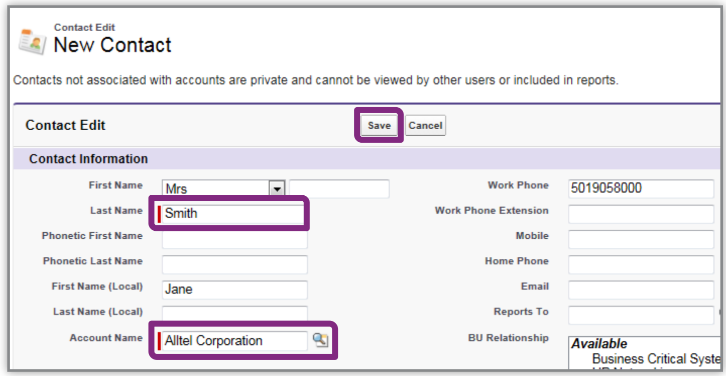
Creating a new contact from an existing account (cont.)

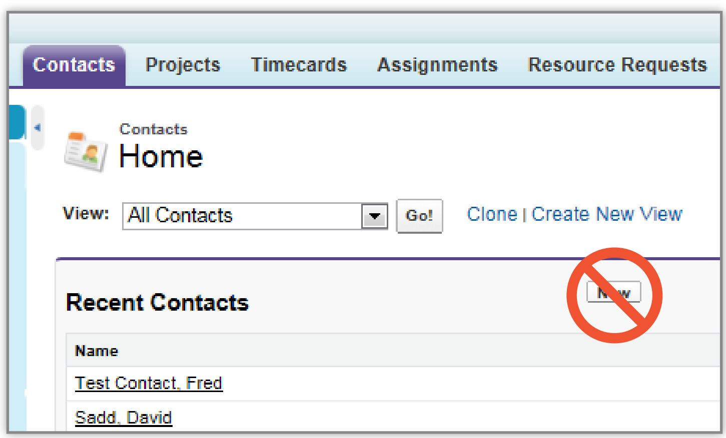
5 Enter the mandatory information and any other details you know about the individual on the **Contact Edit** page.

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.





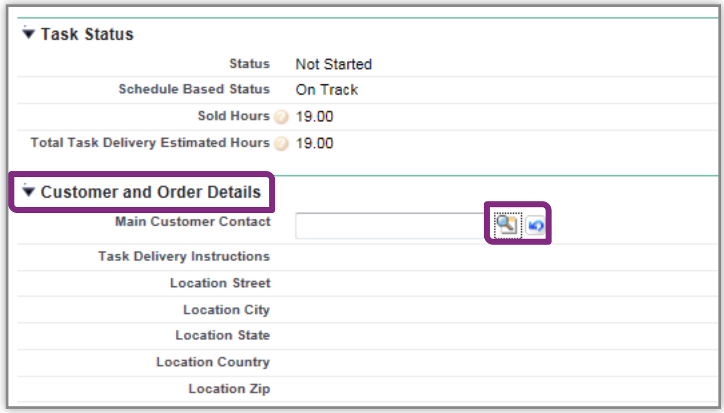
Contacts and Accounts in Salesforce

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.

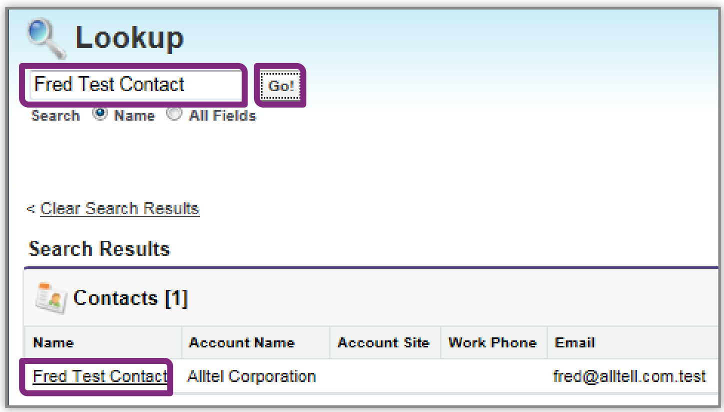
3 Double-click the **Main Customer Contact field** and click the look up icon.



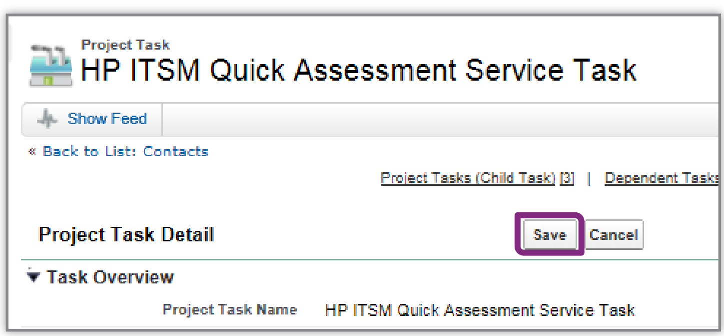
4 In the **Lookup** window, enter the keywords to search for the contact and click **Go**.

TIP: You can use wildcards to refine your search.

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



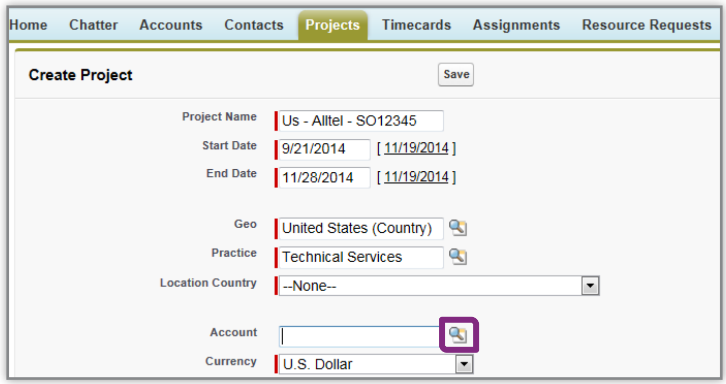
6 Click **Save** on the project, task, or sub-task page.



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.



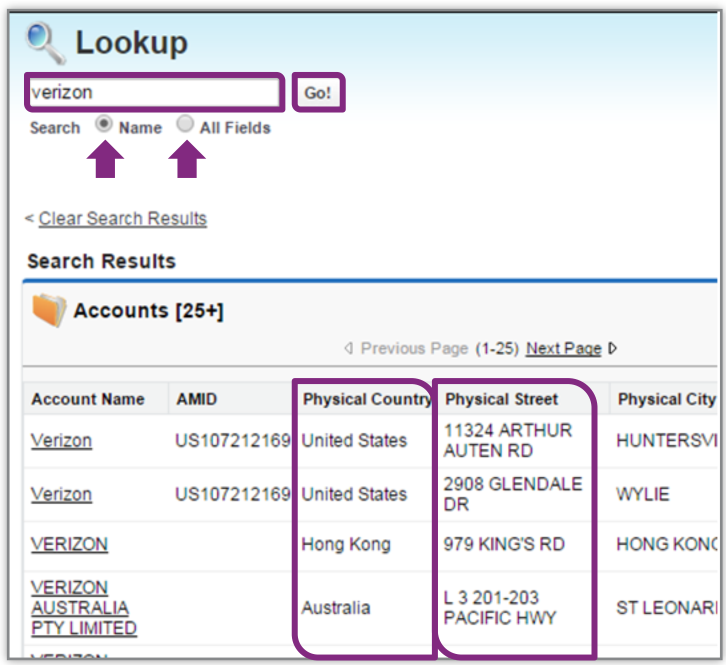
2 A new window will open displaying your recently viewed accounts. Enter in your search criteria.

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).*

Contacts and Accounts in Salesforce

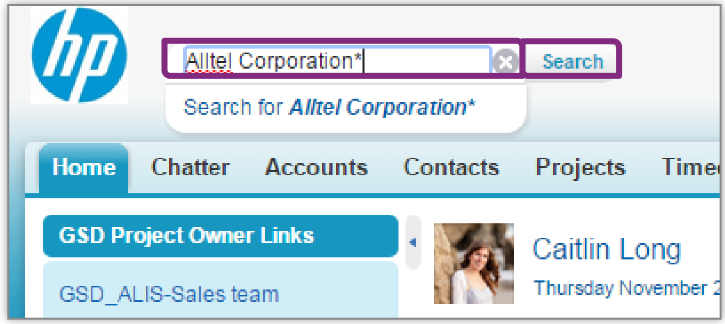
Searching for an existing account using Global Search

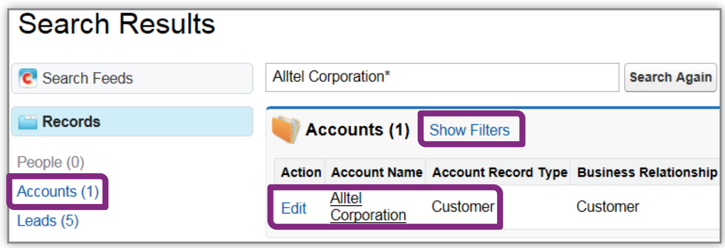
1 Enter any keywords you know into the **Global Search** field such as the Account Name, AMID, or Tax Identifier.

2 Click **Search**.

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

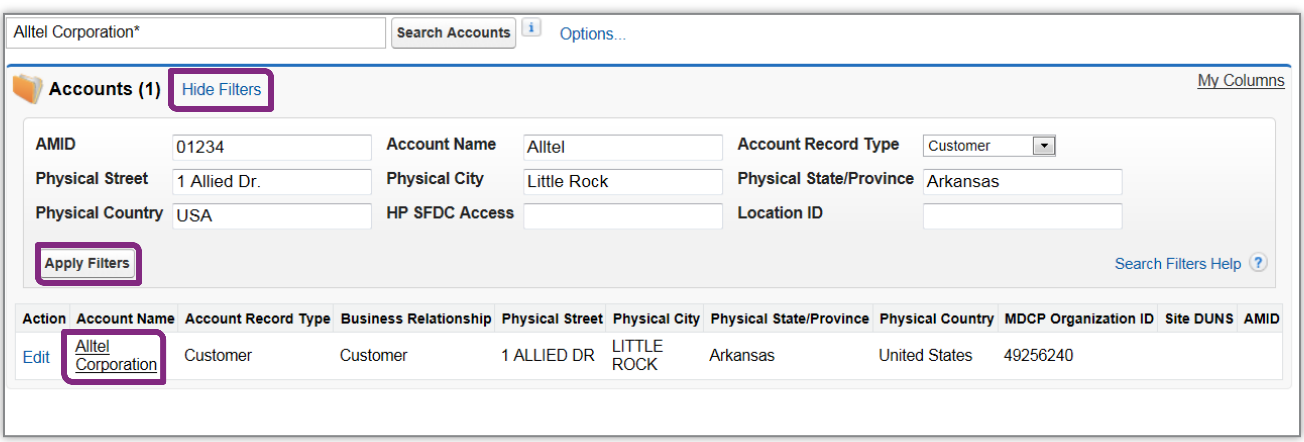
4 You can click **Show Filters** to apply further filters if too many results are returned.





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.

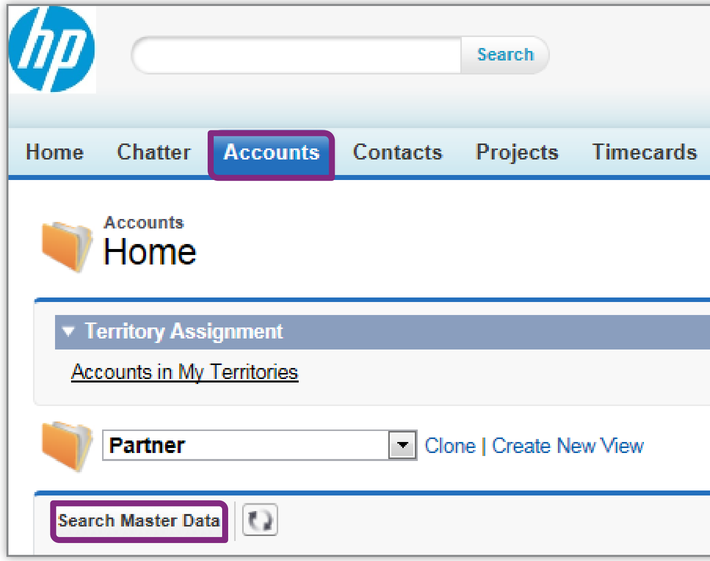


Contacts and Accounts in Salesforce

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.

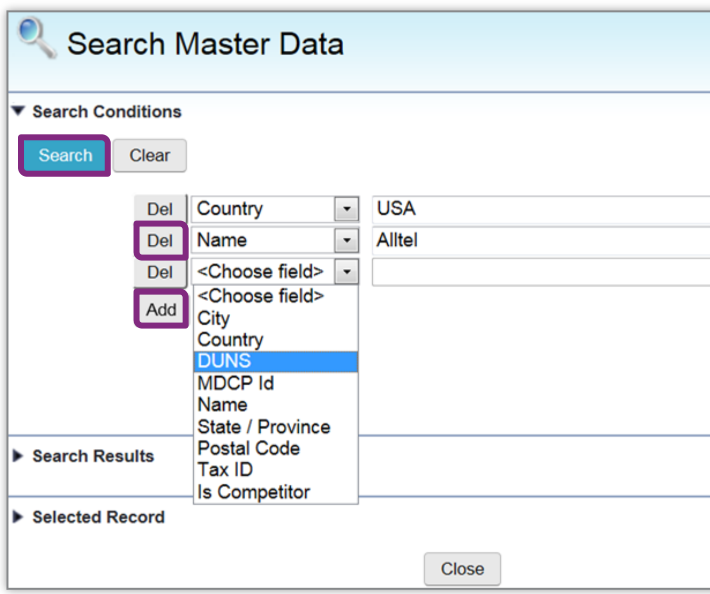


3 In the separate window that displays, enter the search criteria, such as city, country, or name.

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.

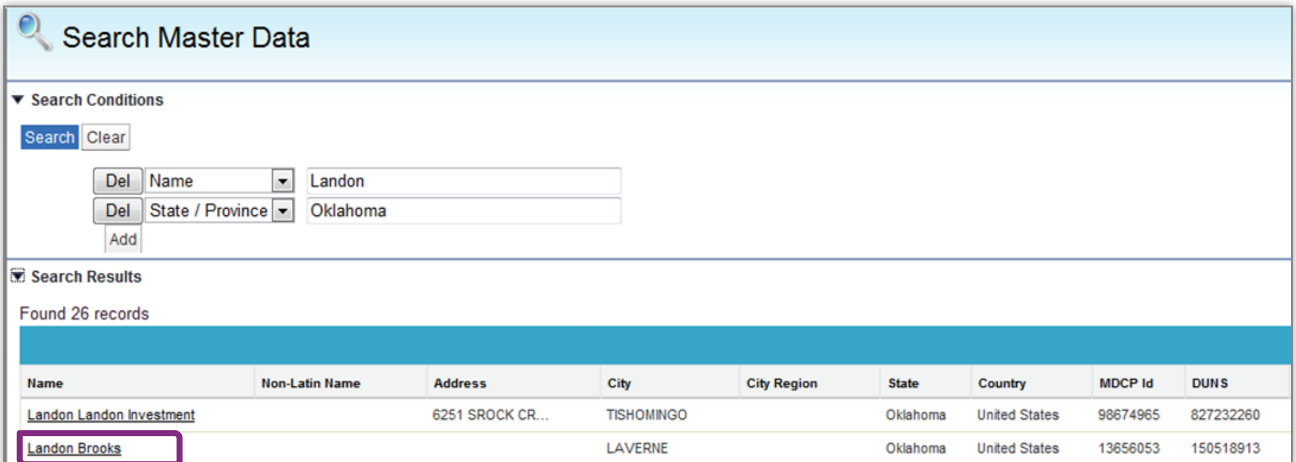
5 Click the **Search** button.



Contacts and Accounts in Salesforce

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

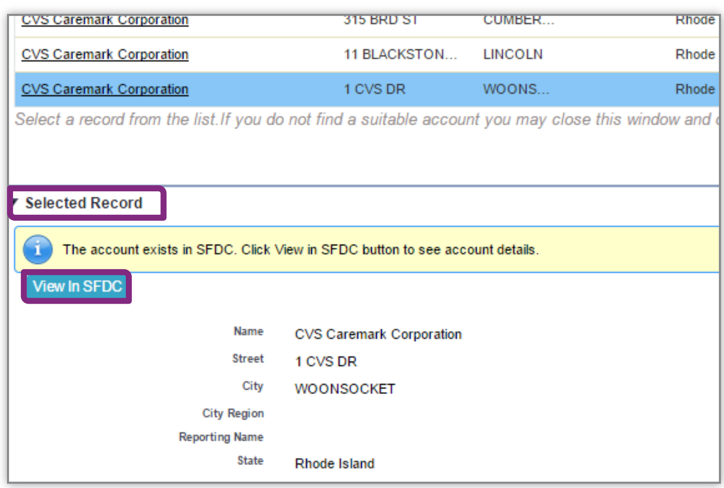
6 The result appears in the **Search Results** section. Click on an account name to see the record's details.



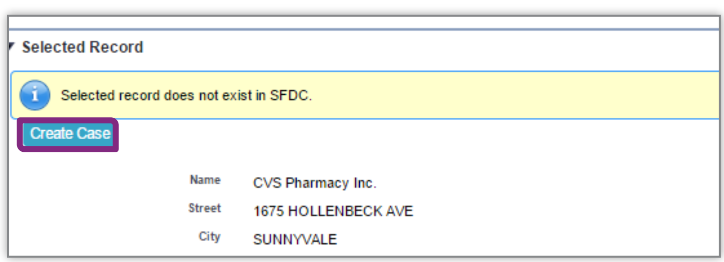
TIP: You can filter the columns by clicking on them.

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**.



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.