CRM Basics

Understanding Salesforce

At its core Salesforce is cloud based Customer Relationship Management software. Data is organized into objects and records, similar to relations and tuples in a standard database. Salesforce comes with standard objects that are ready to use such as Accounts, Contacts, Leads, and Opportunities. You can also create custom objects. Requests and reports can be based off these objects, and Chatter allows for collaboration.

Performing simple customization

To edit personal view click name->My Settings->Display & Layout->Customize My Tabs. This allows you to add and remove tabs as well as change the order of tabs.

You can also update email notifications for Chatter in My Settings->Chatter->Email Notifications.

Searching for data

The global search at the top of each page searches across all objects in Salesforce. The search results pages gives the options to search the company post feeds or records either limited to object type or all. Adding filters help to limit search further.

Accounts & Contacts

Describe what business accounts and contacts are and how they're related

Accounts are companies that you're doing business with and contacts are the people who work for them.

Describe what a person account is

If you're doing business with a single person, eg solo contractor or individual consumer, you use a special account type called a Person Account.

Notes about person accounts: after turning them on you can't turn them off. If organization uses both business accounts and person accounts you'll have to select which type of account you're creating whenever you add an account. Person accounts can't have contacts and don't have account hierarchy.

Social accounts and contacts

The Social Accounts, Contacts, and Leads feature adds social network information from Twitter, Facebook, YouTube, and Klout to records. To use it you must have an account on the network and link the account or contact record to a user profile.

Best practices for managing accounts and contacts

Establish naming conventions for accounts, such as ways to denote relationships between accounts.

Don't allow orphan contacts. Contacts without accounts are hidden from all users except their owner and system admin. This makes them easy to forget and hard to find.

Auditing. You can use exception reporting in Salesforce to find accounts/contacts without activities in the last 30, 60, 90 days. This helps in organizing outreach campaigns or exclude them from list views and campaigns so you can focus marketing and service efforts on active customers.

Maintain active ownership by assigning accounts and contacts to new owners when previous owners leave company or move to a non Salesforce using position.

Relate a single contact to multiple accounts

Contacts may work with more than one company or a business owner might own more than one company. You can relate a contact to more than one account so you can track the relationships between people and the companies they work with. They need to be associated with a primary account, and any others represent indirect relationships.

To allow contacts to multiple accounts enable it from Account Settings. Then add Related Lists to the Account Page Layout.

Define a contact's role for each related account

From an account record use the Related Contacts list to create or edit relationships with contacts by clicking Add/Edit Relationship.

Account Hierarchies

If you've recorded the Parent Account Salesforce can generate a family tree for account records. This can be viewed by clicking the View Hierarchy link next to the Account Name field. Best practices are to either use a Global Enterprise Account or Location-Specific Accounts.

Account Teams

From Setup enter Account Teams to enable, and then select the pages on which to include the Account Team related list. Then you can add and modify Account Teams on each Account record. You can also establish a default team.

Leads & Opportunities

Describe how to use opportunities

Opportunities are included in the features designed to support the sales process. Opportunities are deals in progress. In Salesforce you can create opportunities for existing accounts or by converting a qualified lead, and they move through a series of stages lined to type of tasks being performed.

Set up a sales process

Setup->Customize->Opportunities->Sales Processes. The first new process for the organization will be a Master process. By default all stages are included in a new process, but this can be modified.

Set up opportunity stages

Setup->Customize->Opportunities->Fields->Stage. Click new and enter a name for the stage and the probability that any sale in this stage will be successfully completed.

Create an opportunity/opportunity record type

Setup->Customize->Opportunities->Record Types. Select a sales process to apply the record type to and which profiles can access the new sales process.

To create an actual opportunity got to the Opportunities tab and click new. If the organization has more than one record type for opportunities select the type that best represents this opportunity. Name it and select the account it relates to. Select a close date and the current stage. Modify the probability if needed.

Add Contact Roles to an opportunity

Contact Roles for opportunities tell you which contacts you're dealing with for it and how each is related. You can link contacts from other accounts to the opportunity using contact roles by clicking new in the Contact Roles related list of an opportunity.

Set up an Opportunity Team

You can also add an Opportunity Team if you enable Team Selling and subsequently include which opportunity pages you want them implemented on. You can add members to an opportunity team through the opportunity record, or if you often use the same team for opportunities you can create a default team to automatically add. If the roles provided don't match the company's sales process you can add new roles or change existing ones through Setup->Customize->Opportunities->Opportunity Teams->Fields and using to options in the Team Role Picklist Values area of the Team Role field.

Determine if you will use leads

Leads are people and companies that you've identified as potential customers. Leads in Salesforce are optional but provide big advantages like focusing on potential deals most likely to close.

To add a lead click on the Lead tab and click new. Enter the name and company field, if relevant. Choose a status and any other information available. The lead can be automatically assigned using lead assignment rules.

Set up lead assignment rules

If Salesforce hasn't been given rules for assigning leads you own all the leads you create, or if created from a web form or other automatic process owned by the administrator who set up that process.

It is more efficient to set up Salesforce to assign leads based on criteria (such as location, industry, product interest, etc) To do this enter Assignment Rules in Setup.

To set up a criteria based lead assignment rule enter Assignment Rules from Setup. Click new and name it, choose active to turn it on immediately. Choose the rule name and in the Rule Entries area click new to enter a sort order for the rule. This includes a sort order and criteria to be met to run rule.

Convert a lead

When you qualify a lead it can be converted into an opportunity which you'll then work until you either close the deal or cancel it. To do so click on the lead to convert in the Leads tab and click Convert. In the Account Name either select a new account or search for an existing one. If the lead is an individual consumer and the company uses person accounts leave the Account Name field blank. You can optionally create a new Opportunity from the conversion. You can also optionally schedule a follow-up under Task Information.

Data Quality

Factors that determine data quality

Missing records, duplicate records, no data standard, incomplete records, and stale data all are examples of bad data quality.

Good data vs bad data

Inaccurate or incomplete data can lead to 20% stalled productivity, the average company loses 12% of its revenue as a result of inaccurate data. Forty percent of all business initiatives fail to achieve targeted benefits due to poor quality data. Good data allows you to prospect and target new customers, identify and cross-sell opportunities, gain account insights, increase efficiency, retrieve info fast, build customer trust, increase rep adoption rate, plan and align territories better and score and route leads faster.

Ways to measure data quality

A good way to keep track of data quality is through the Data Quality Analysis Dashboards App which can be installed from AppExchange.

Ways of using Salesforce to implement a data management plan

Create required fields for the data that is necessary to support the management plan. Validation rules to ensure data follows a particular format. Workflow rules to automate standard internal procedures and processes. Remove unused fields from page layouts. Create simple dashboards to support business objectives. Use data enrichment tools. Use Duplicate Management (Salesforce's build in duplicate management tool) to prevent duplicates. Use custom field types such as Date, Currency, or Picklists.

Reports & Dashboards

Phrase business needs as answerable reporting questions

Requests for reports typically come in the form of a question. Before building a report you should ask follow up questions and tailor the report to the answers.

Explain the difference between a report, dashboard, and report type

A report is a list of records that meet the defined criteria and is displayed in Salesforce in rows and columns that can be filtered, grouped, or displayed in a graphical chart.

A dashboard is a visual display of key metrics and trends for records in org. There is a 1:1 relationship between dashboard components and reports since a report exists for each component. Multiple components can be shown together on a single page layout, and the running user determines which data to display in a dashboard.

A report type is a template that makes reporting easier. The type determines which fields and records when creating a report. Salesforce includes a set of predefined standard report types, but custom report types can also be made.

Drag and drop report builder

Allows you to create reports by dragging fields from the fields pane onto the preview pane. The filters pane allows you to enter additional criteria to limit results.

To enable report builder for all users Setup->Reports and Dashboard Settings. If you do not see an Enable option then report builder has already been enabled for the organization.

Value of using filters, cross filters, and filter logic

Filters and filter logic allows you to get more specific and row limits help you to limit the answer you receive. Cross filters allow you to extend your report types to objects related to the original objects defined in the report type, eg Stale Opportunities = Opportunities without activities in the past 30 days and Orphan Contacts = Contacts without Accounts. Filter logic conditionally applies these filters, eg only using them if Industry equals Manufacturing or Annual Revenue greater than 500,000.

The four report formats

Report Format	Primary Use Case	Supported in Dashboards	Report Charts Supported	Bucket Fields**	Formulas**	Cross-Object Formulas**
Tabular	Make a list	✓*		✓		
Summary	Group and summarize	✓	✓	✓	✓	
Matrix	Group and summarize, by row and column	✓	✓	✓	✓	
Joined	Show reports side-by-side, in blocks		✓		✓	✓

Tabular are the simplest and fastest way to look at data. Similar to a spreadsheet. Summary reports are similar to tabular reports but allow users to group rows of data, view subtotals, and create charts. Summary reports are better for use in dashboards than tabular. Matrix reports allow you to group records both by row and column and provide the most detailed view of data. Joined reports let you create different views of data from multiple report types, organizing data in blocks.

Drag and drop dashboard builder

To build a dashboard drag components into the preview pane. Once you've drug the component into review click on the data sources tab to select report. The data that is displayed varies based on the running user.

Dynamic dashboards

Allows each user to see the data they have access to without needing to create separate dashboards for each user.

Adding a report chart to a report

If you don't want to create a dashboard you can instead use report charts to place a single chart at the top of the report.

Setting up sharing setting for report and dashboard folders

Folder Sharing in Salesforce allows you to restrict access to reports and dashboards by users, roles, roles and their subordinates, and public and private groups. Enhanced folder sharing lets you control who sees what. Access levels are: viewer, editor, and manager.

Subscribing to report notifications

You can choose a time to run a report and specify conditions to notify you. From the Report Run page on an existing report click Subscribe. Specify the condition in aggregate, operator, and value. For example, trigger notification when the sum of amount is less than $1 million.

Posting dashboard snapshots to Chatter

Must be enabled for dashboard under Setup->Reports and Dashboard Settings. After that you can hover over a component to display the hover menu which allows you to post the snapshot to the Dashboard Feed or the User or Group Feed.

AppExchange reports and dashboards

Free customizable reports and dashboard packages can be found at the AppExchange

Chatter Basics

What is Chatter?

Chatter is a Salesforce collaboration application that lets users work together, talk to each other, and share information in real time.

Different types of Chatter groups

Groups are the main collaboration space in Chatter. Provided groups include public groups, private groups, unlisted groups, groups with customers, and broadcast only groups. Groups can be created in Setup->Chatter Settings.

Following users, groups, and records

Following is a way to identify the people and records you want to keep track of. You will see updates from these people and records in the What I Follow feed.

Enabling and configuring email notifications

To enable for all users Setup->Chatter Email Settings->Email Settings. Individual settings can be controlled under My Settings->Chatter->Email Notifications.

Feed Tracking

Enable feed tracking through Setup->Feed Tracking

Publisher Actions

Actions add functionality like post, poll, and question to the Chatter publisher. They can be Standard, Nonstandard, Default, Mobile smart actions, Custom, or Productivity actions. Add global actions by enabling Actions in the Publisher feature in Chatter by going to Setup->Chatter Settings->Publisher.

Approving Records from the Feed

Enable through Setup->Chatter Settings->Approval Posts->Allow. You can create post templates through Setup->Post Templates.

Salesforce CPQ Basics

What is it?

CPQ stands for configure price quote, and with it sales teams can create quotes quickly. To configure you answer questions about customer and what they're looking for. This will provide a tailored list of products. The price is handled by Salesforce, applying any applicable discounts. The quote is generated as a pdf.