SFDC – Quick Start Guide

Updated: December 2021

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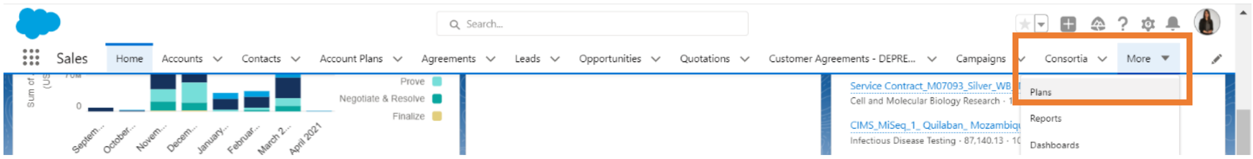
How do I create a new Territory Plan?

To create or access Territory Plans, locate the **“Plans”** tab in SFDC.
If **“Plans”** is not currently located in your top bar, click on **“More”** to view

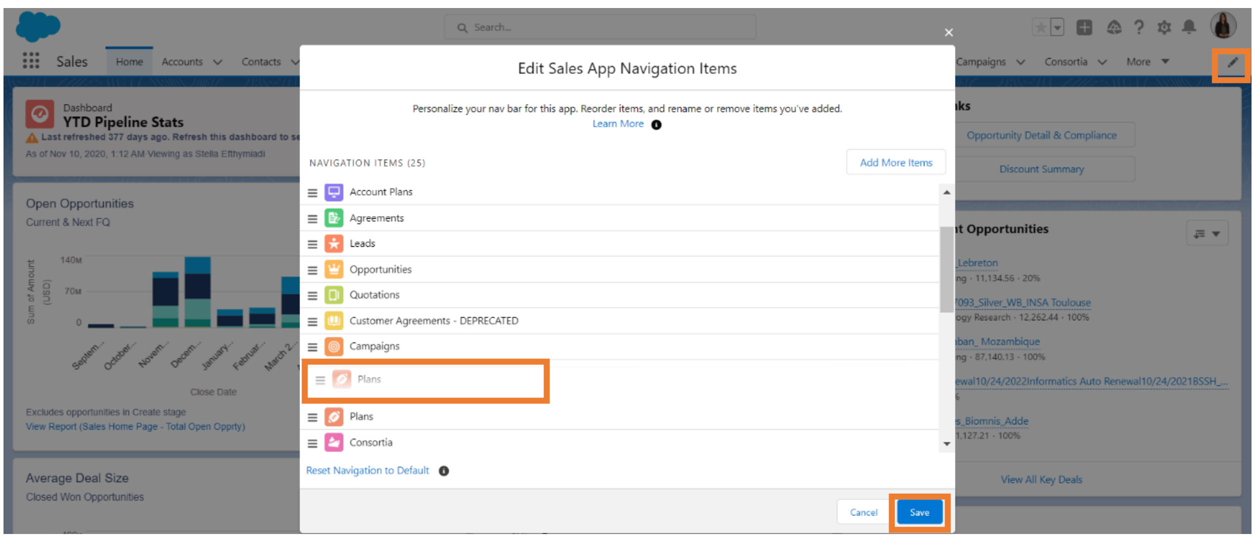


additional tabs.

To change the order of your current top bar, click on the pencil icon in the top right-hand corner.

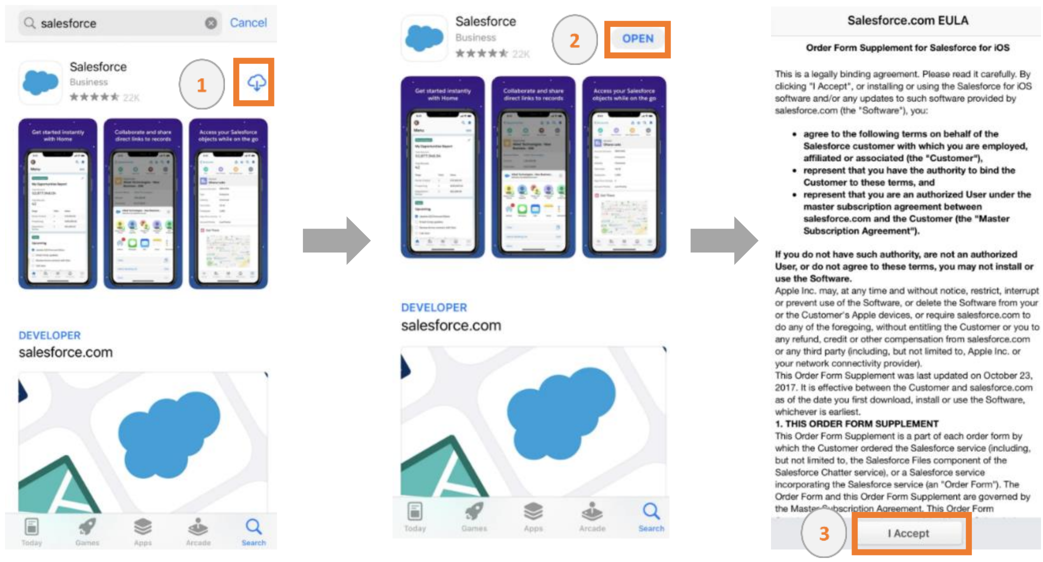
Locate “Plans” on the pop-up screen that appears and drag the Plans object to the order you would like it to appear.

Click Save.

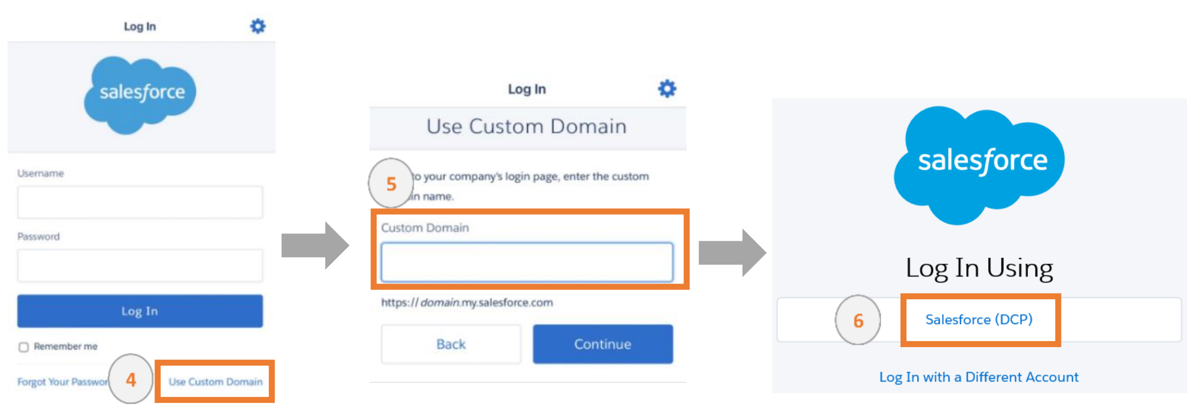


How do I set up the Salesforce mobile app?

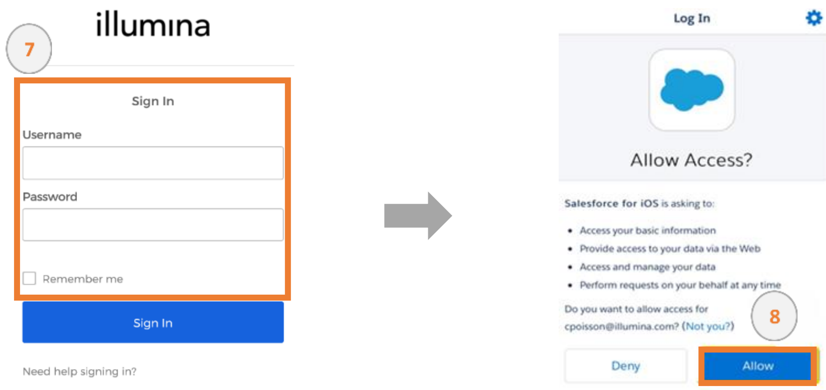
1. **Search** for Salesforce app in the app store and **download** it
2. **Launch** the application
3. **Accept** the terms and conditions



4. Select "**Use Custom Domain**"
5. Enter Custom Domain "**Illumina**" and click continue
6. Select **Salesforce (DCP)**

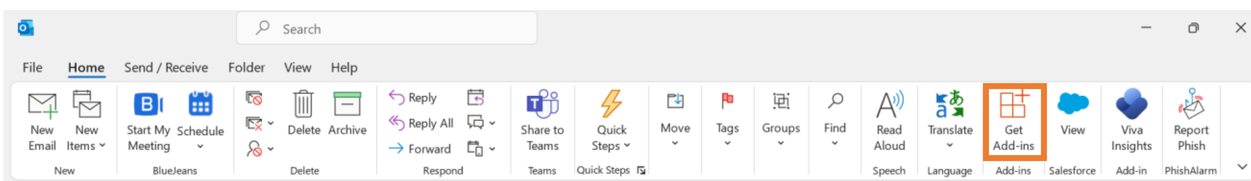


7. **Log in** through Okta and select remember me
8. **Press** Allow

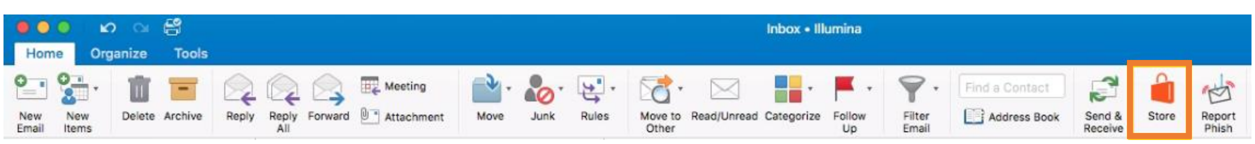


How do I set up Outlook Integration?

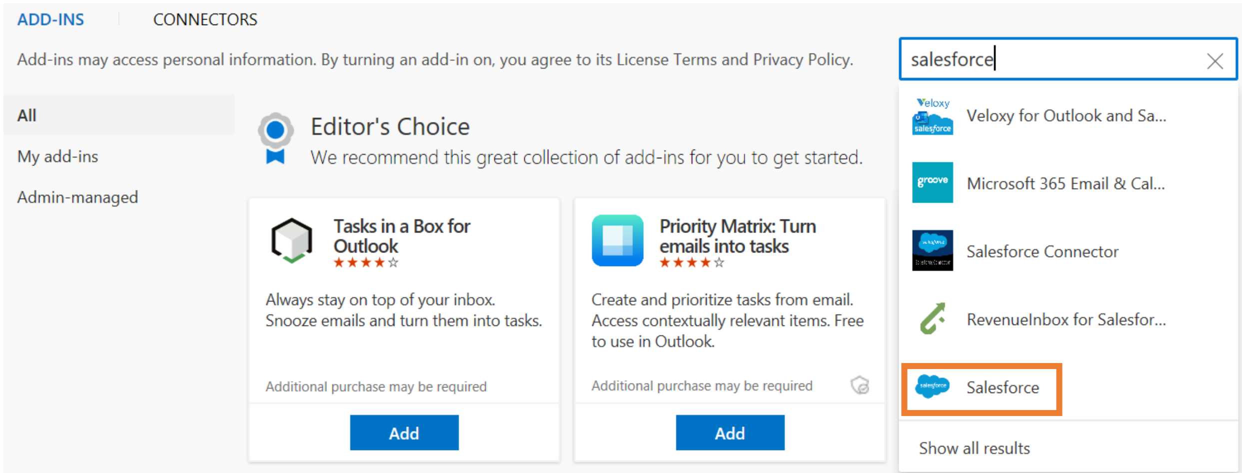
1. While on the "Home" tab of your Outlook, click **"Get Add-ins"**



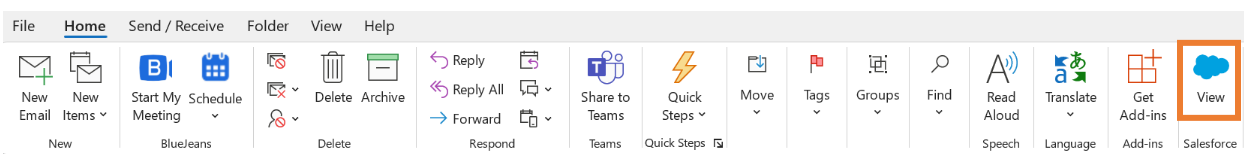
- For Mac users go to **Store** icon in Outlook

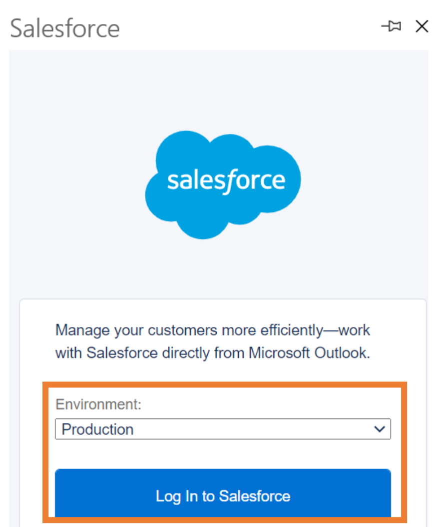


2. In Add-Ins store, search for **"Salesforce"** and click **"Add"**

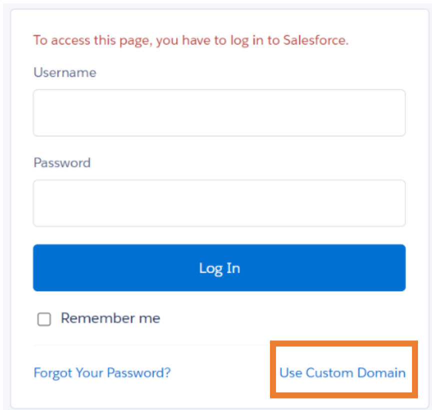


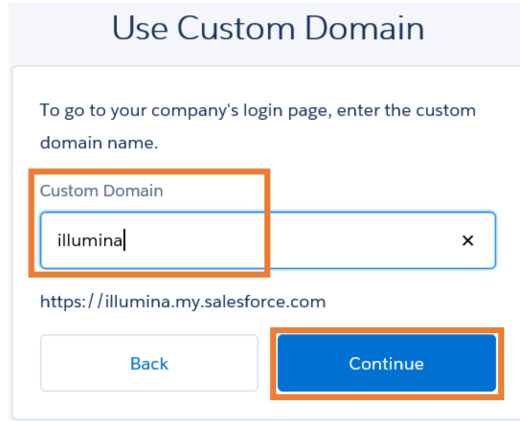
3. After the Salesforce Add-in loads, click the **"View"** button. A side panel will appear, ensure the Environment is set to **"Production"** and click **"Log In to Salesforce"**



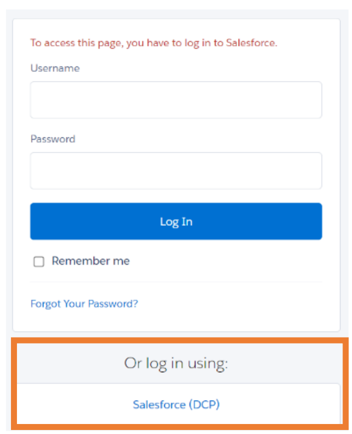


4. Click the "Use Custom Domain" and enter **"illumina "** into the Custom Domain field

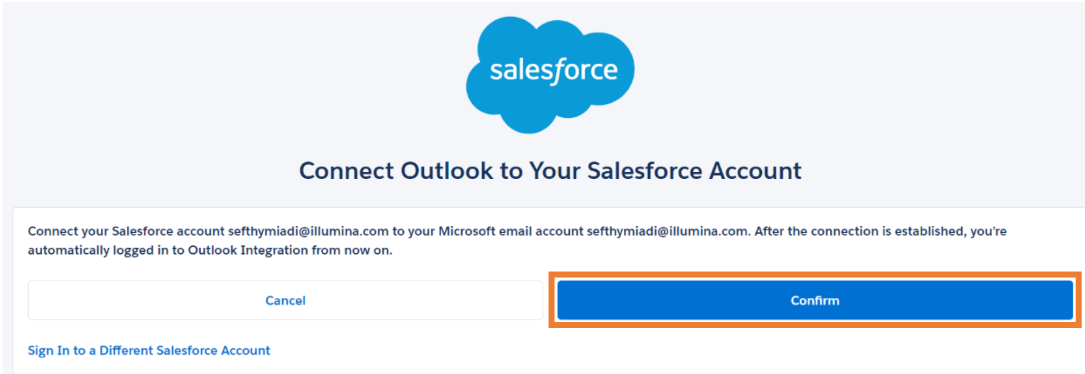




5. Click **"Salesforce (DCP)"**

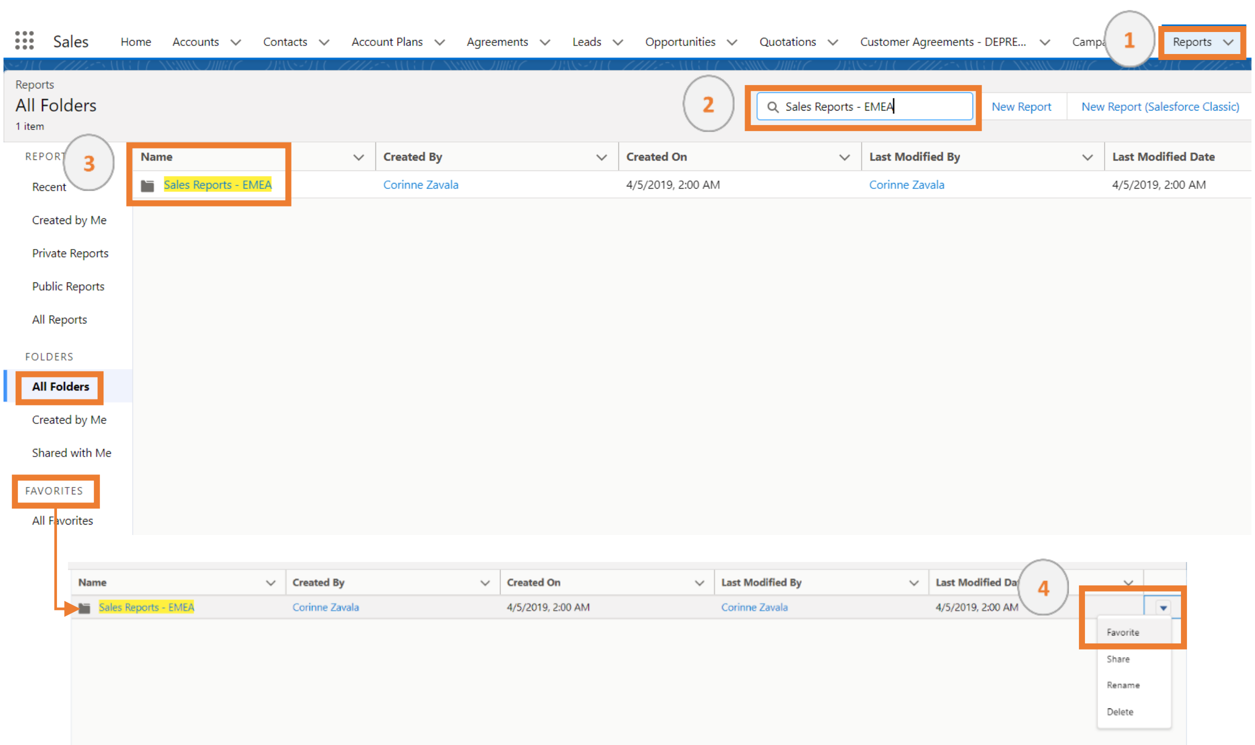


6. Click **"Confirm"** to connect your Salesforce account to your Microsoft email account. After the connection is established, you're automatically logged in to Outlook Integration from now on.



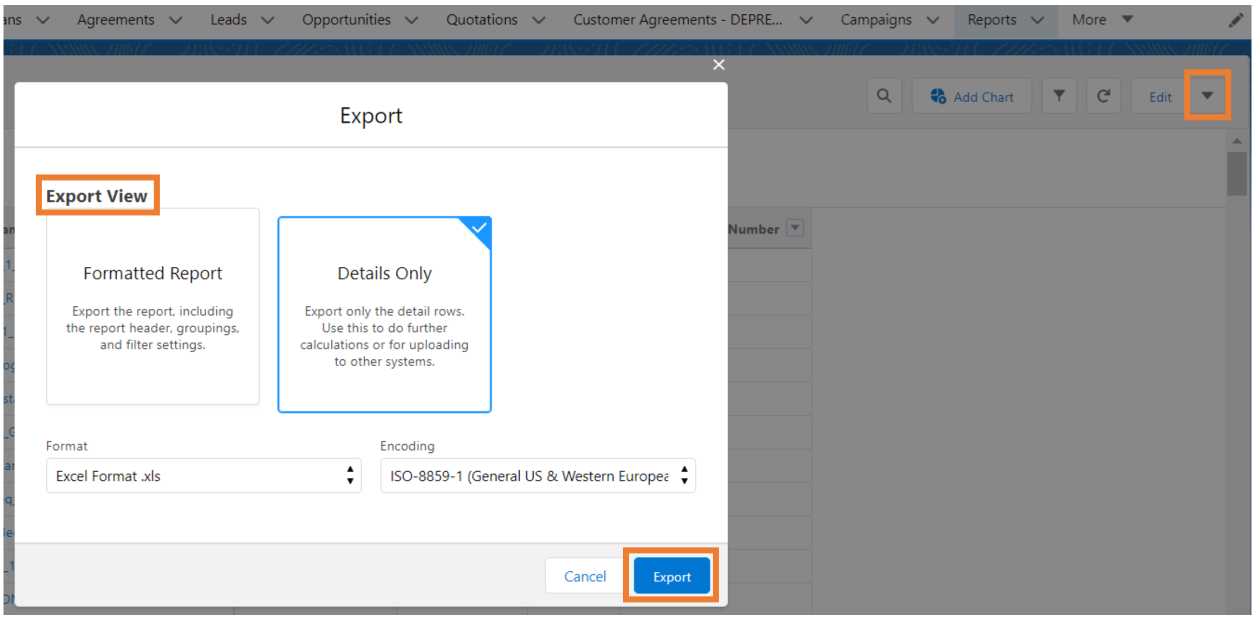
Where can I access my Salesforce reports?

1. Click on the **Reports** tab
2. Click on **All Folders** on the far-left pane and locate the **Sales Reports - EMEA folder**
3. Open folder to view a list of commonly used reports
   - Click on report to view report output
4. **Favorite** this folder for easy access
   - For future reference, simply select All Favorites on the left to view reports



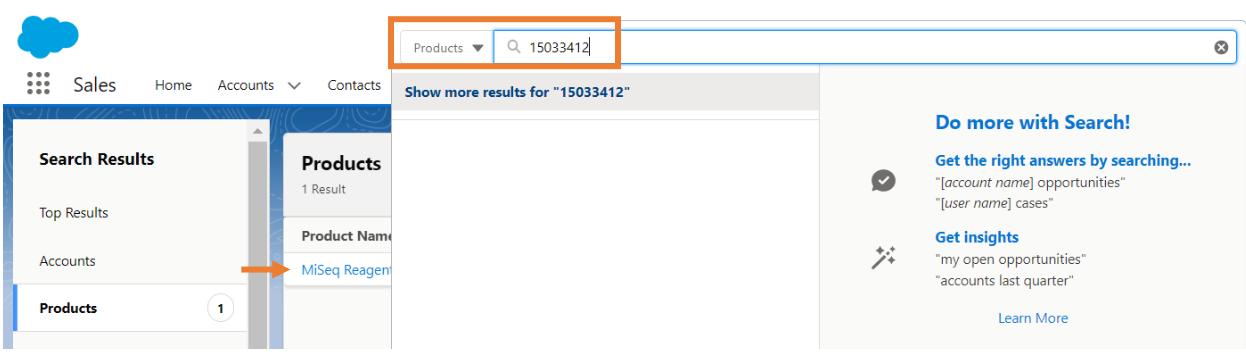
How do I export an SFDC report to Excel?

1. To export the report, click the dropdown arrow in the top right
2. Select **Export**
3. A popup will appear. Choose between a formatted report or just details and click **Export** and this will download as an Excel file

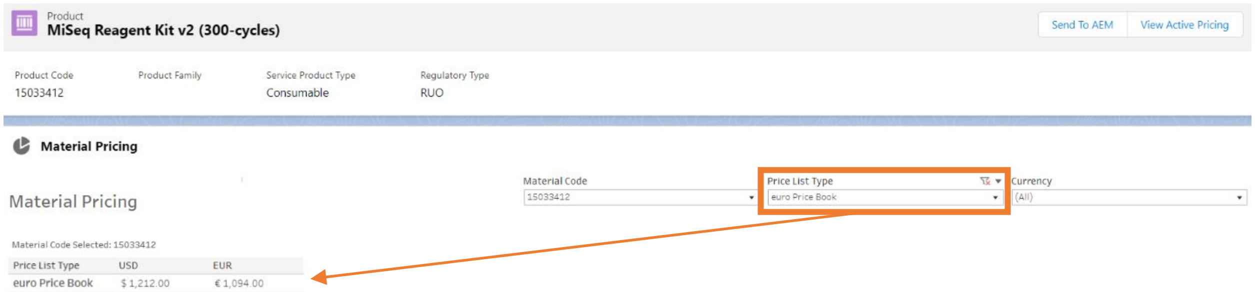


How do I find the List Price to a product in Salesforce?

1. On Salesforce home page, search for a specific product code and select 'Products' in the drop-down menu next to the search bar. View the search result.

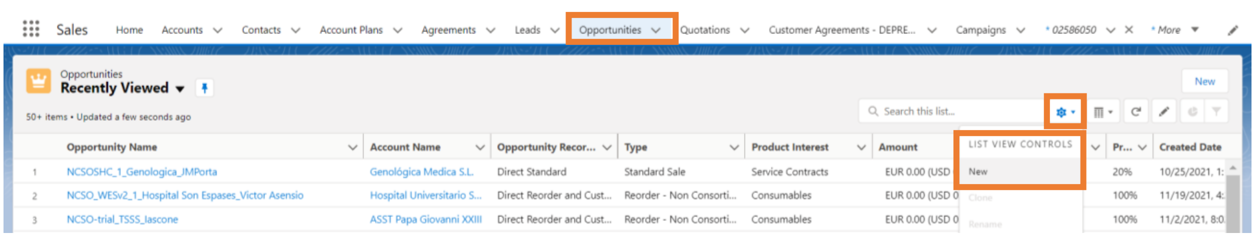


2. In the product page, select the 'Price List Type' of your interest so you can view the related pricing

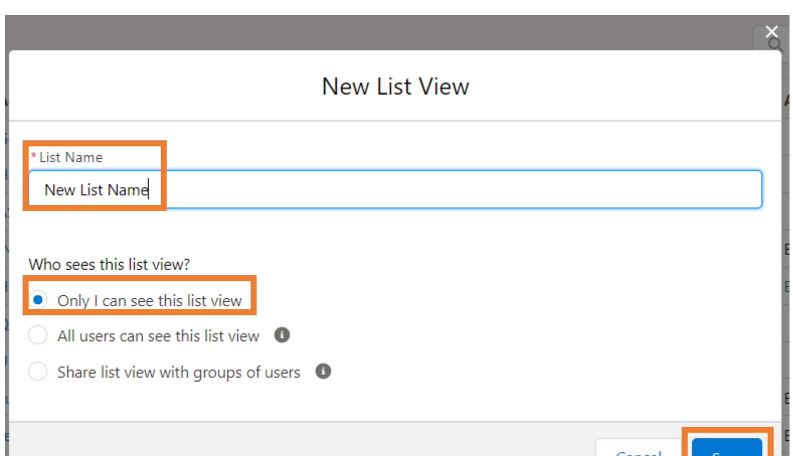


How do I set up a custom list view?

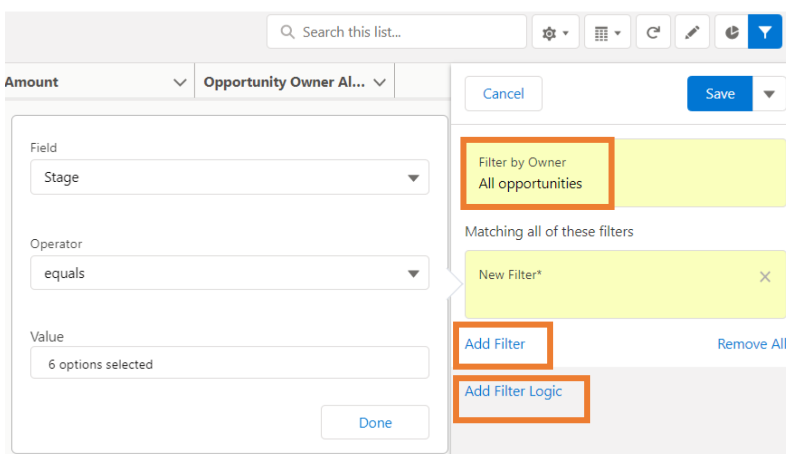
1. Click on the **Opportunities** tab
2. Click on the **List View Controls** button and select **New**



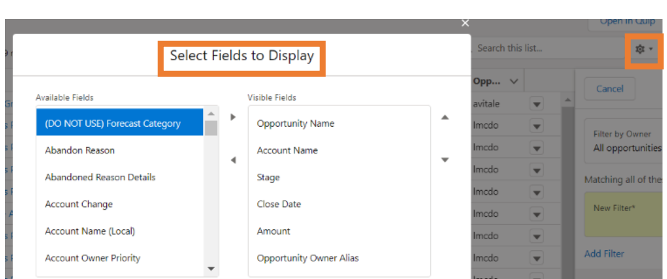
3. Enter the name of your new list view (it can be renamed later)
4. Keep Privacy option as is – only the user will have access to the view
5. Click Save to move to the next step



6. Customize your list view with specific criteria by clicking **Filter by Owner** and selecting **All Opportunities** (This will include all opportunities assigned to your territory coverage)
7. To add additional files, click on **Add Filter**
    a. **Field**: Select the field that you would like to apply the filter on (e.g. Stage)
    b. **Operator**: Select the logic of the field chosen in the previous step (e.g. Equals)
    c. **Value**: Select the values of the filter to be selected (e.g. All open Opportunities - multiple selection allowed)
8. In case of multiple filters, filter logic can be also applied (i.e., AND/OR operators)
9. Click **Save** - the view refreshes every time you press Save



10. **Select fields to display** (columns) under List View Controls



11. Click the **Filter** button to hide all filters. Use the same process to make the filters visible. Filters can be changed only for the List views that you have created. The standard List views can't be changed.
12. Click **Pin This List View** to make this view default whenever you access the Opportunities tab