

SFDC – Quick Start Guide

Updated: December 2021

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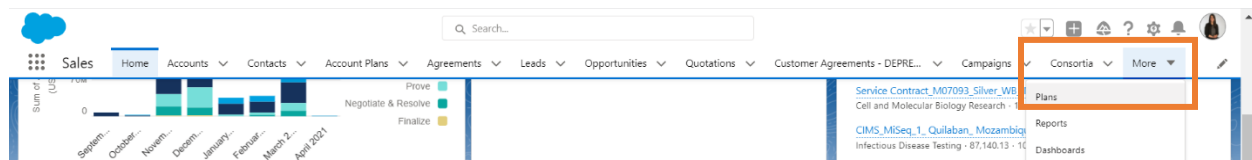
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How do I create a new Territory Plan?

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

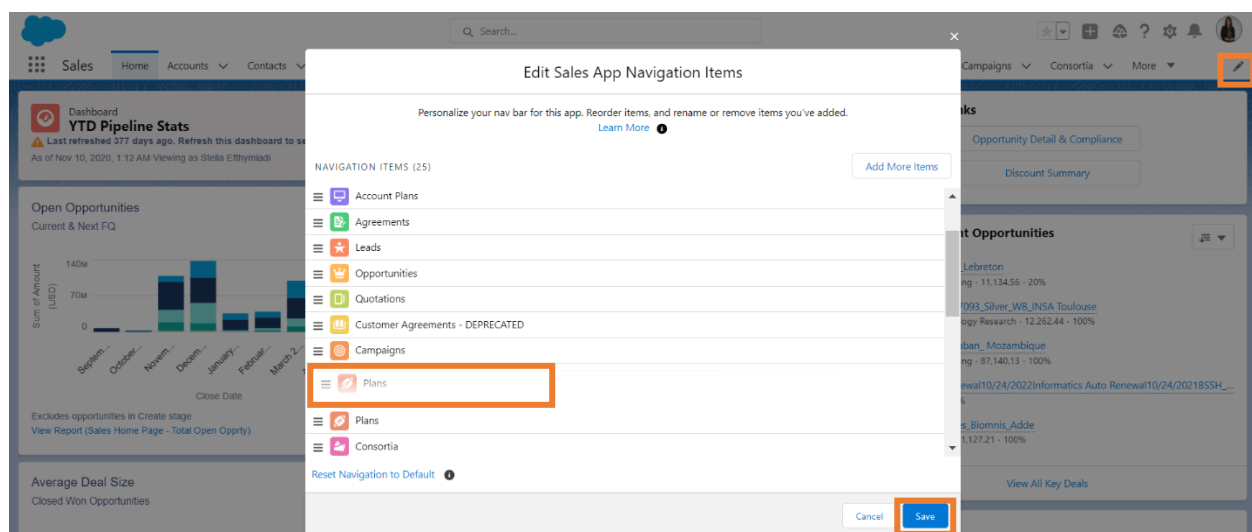


additional tabs.

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.

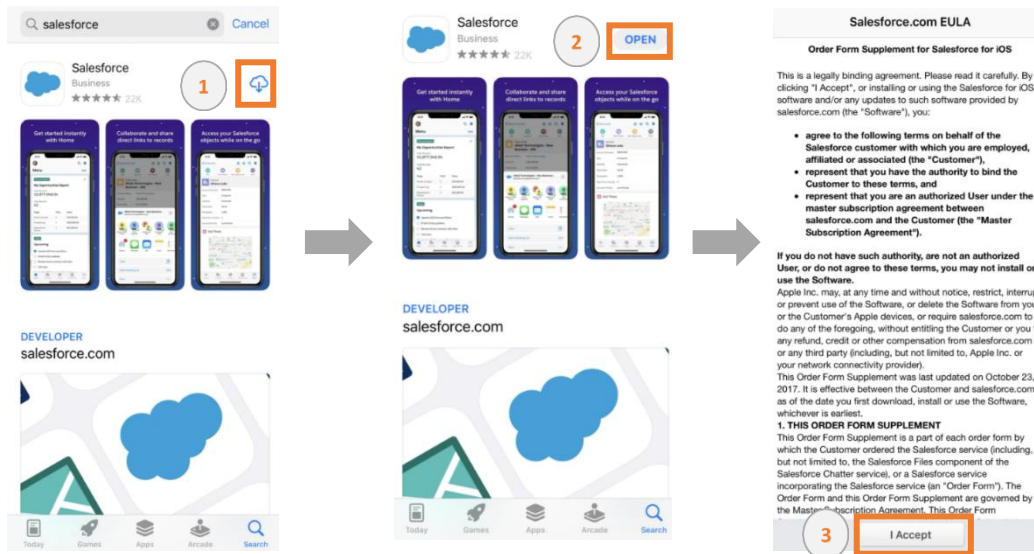


How do I set up the Salesforce mobile app?

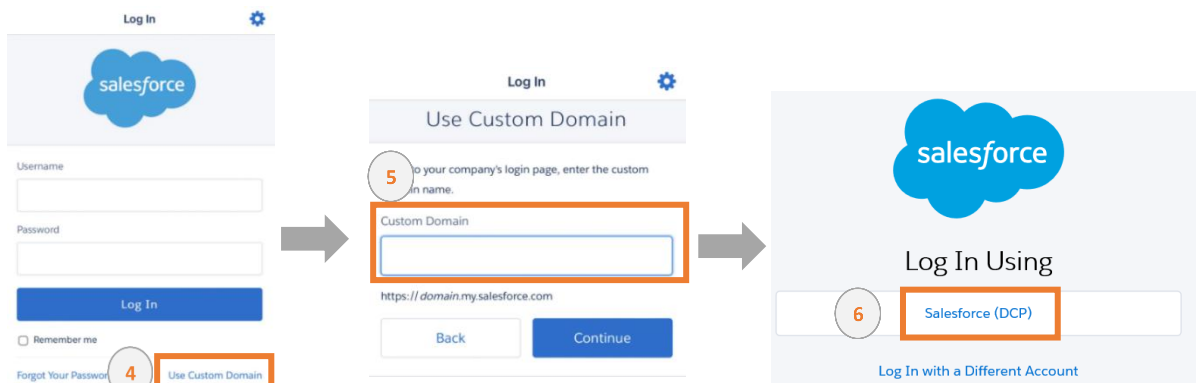
1. **Search** for Salesforce app in the app store and **download** it
2. **Launch** the application
3. **Accept** the terms and conditions

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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

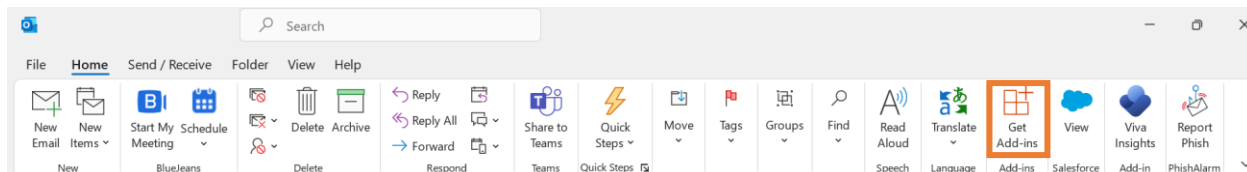
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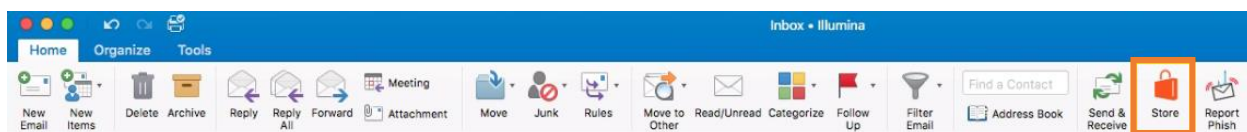


How do I set up Outlook Integration?

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



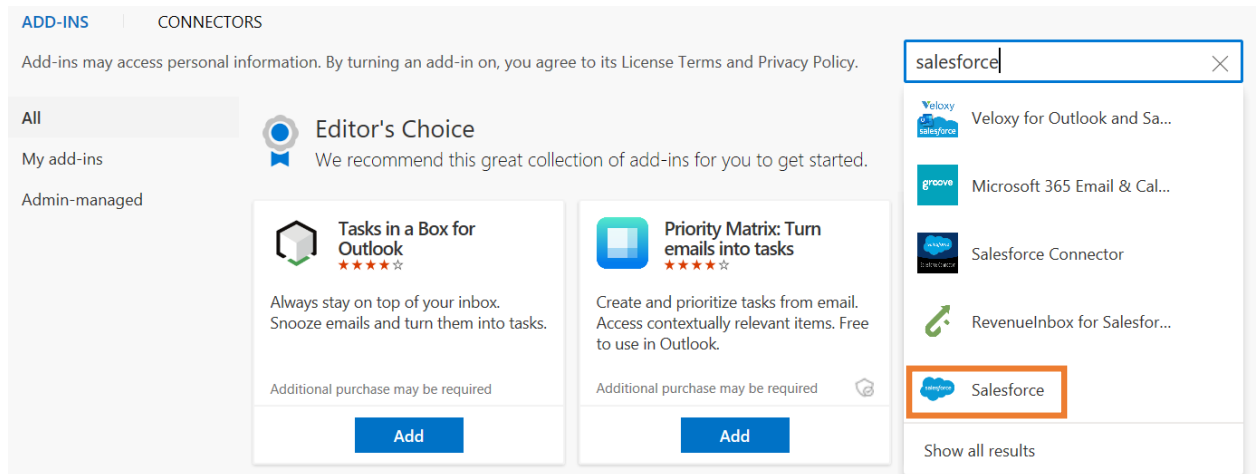
- o For Mac users go to **Store** icon in Outlook



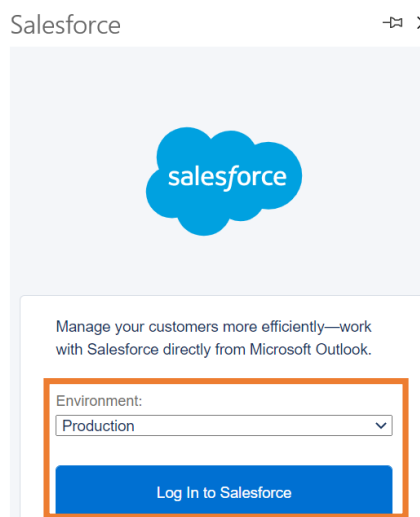
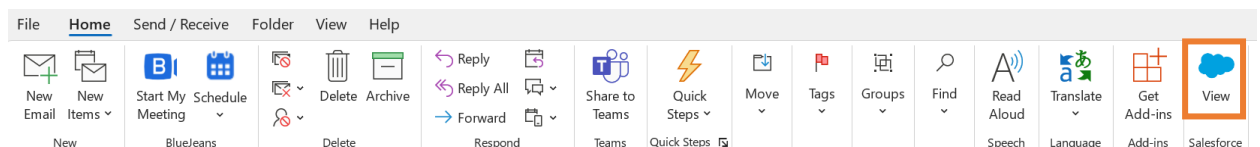
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2. In Add-Ins store, search for "**Salesforce**" and click "**Add**"



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**"



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

The diagram illustrates the process of selecting a custom domain for Salesforce. On the left, the standard Salesforce login page is shown with fields for Username and Password, a Log In button, a Remember me checkbox, and links for Forgot Your Password? and Use Custom Domain. The 'Use Custom Domain' link is highlighted with an orange box. A large grey arrow points to the right, where the 'Use Custom Domain' page is displayed. This page prompts the user to enter a custom domain name. The 'Custom Domain' input field, which contains the text 'illumina', is highlighted with an orange box. Below the input field, the URL 'https://illumina.my.salesforce.com' is shown. At the bottom of the page, there are 'Back' and 'Continue' buttons, with the 'Continue' button highlighted by an orange box.

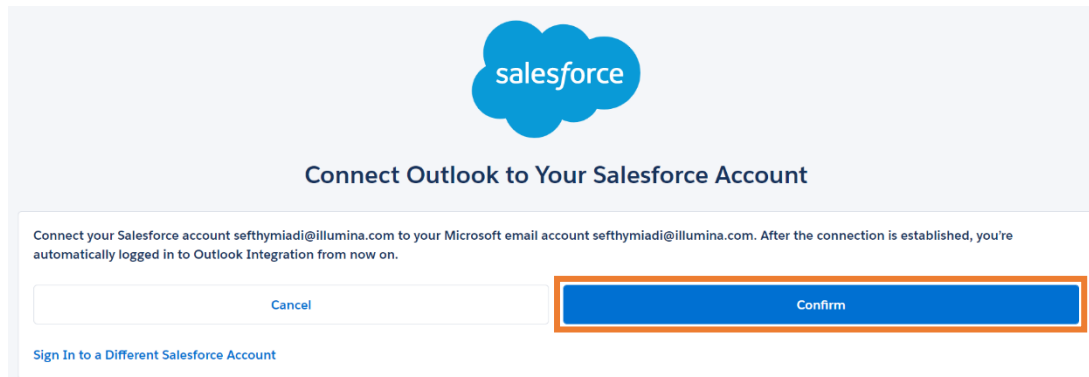
- Click "**Salesforce (DCP)**"

This screenshot shows the Salesforce login page. At the bottom of the page, there is a section titled 'Or log in using:' which contains a button labeled 'Salesforce (DCP)'. This button is highlighted with an orange box, indicating the next step in the process.

- 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.

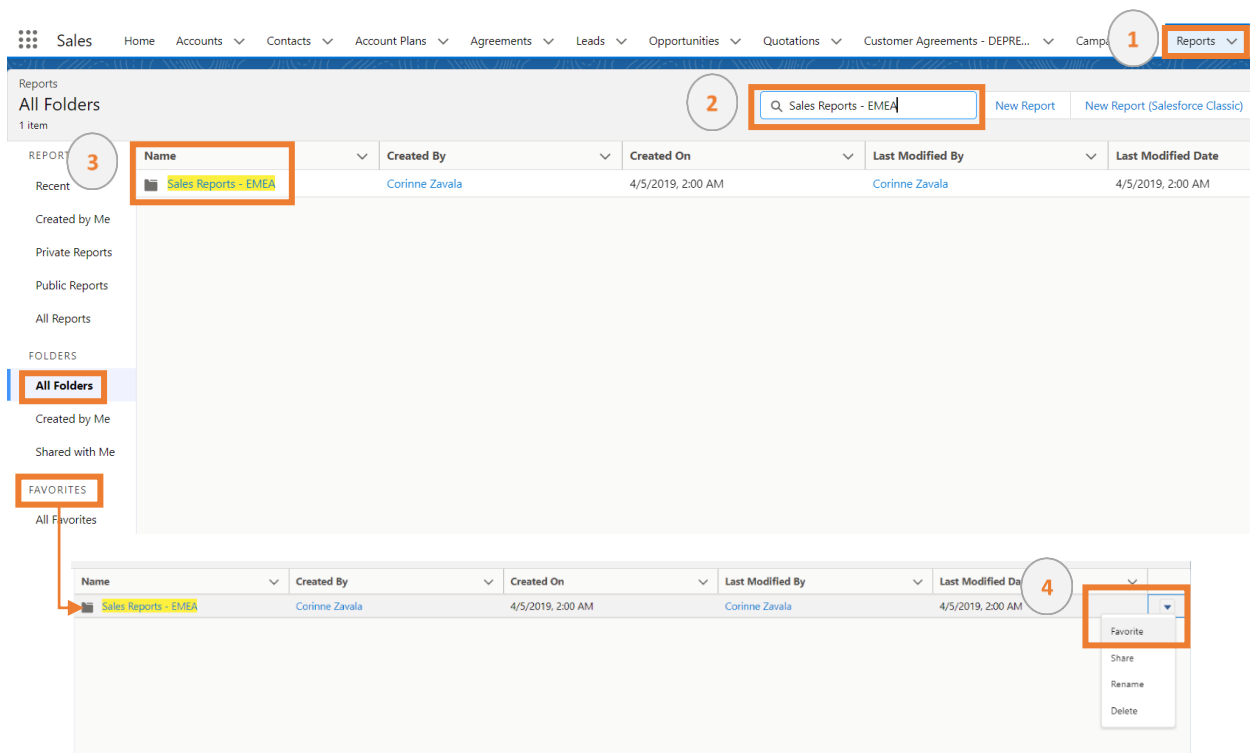
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Where can I access my Salesforce reports?

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
 - o Click on report to view report output
4. **Favorite** this folder for easy access
 - o For future reference, simply select All Favorites on the left to view reports

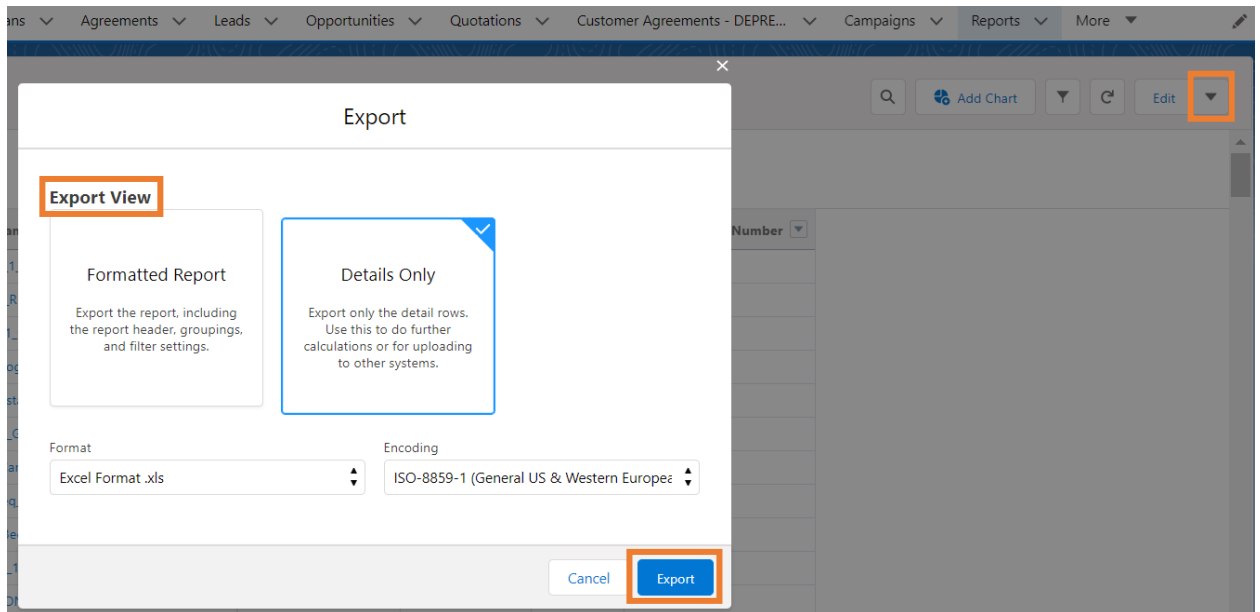


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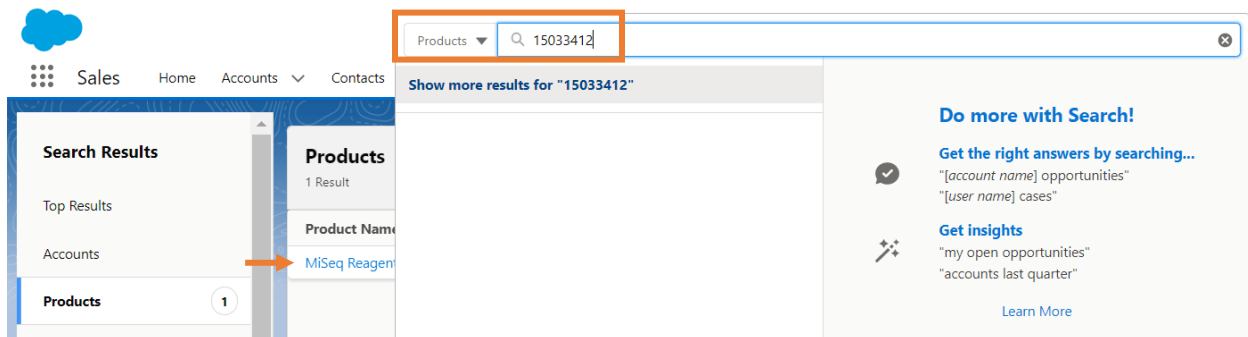
How do I export an SFDC report to Excel?

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.



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

Product: MiSeq Reagent Kit v2 (300-cycles)

Product Code: 15033412 | Product Family: | Service Product Type: Consumable | Regulatory Type: RUO

Material Pricing

Material Code: 15033412 | Price List Type: euro Price Book | Currency: (All)

Price List Type	USD	EUR
euro Price Book	\$ 1,212.00	€ 1,094.00

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**

Sales | Home | Accounts | Contacts | Account Plans | Agreements | Leads | Opportunities | Quotations | Customer Agreements - DEPRE... | Campaigns | 02586050 | More

Opportunities Recently Viewed

50+ Items • Updated a few seconds ago

Opportunity Name	Account Name	Opportunity Recor...	Type	Product Interest	Amount	LIST VIEW CONTROLS	Pr...	Created Date
1 NCSOSH_C_1_Genologica_IMPorta	Genologica Medica S.L.	Direct Standard	Standard Sale	Service Contracts	EUR 0.00 (USD 0.00)	New	20%	10/25/2021, 1:...
2 NCSO_WESv2_1_Hospital Son Espases_Victor Asensio	Hospital Universitario S...	Direct Reorder and Cust...	Reorder - Non Consorti...	Consumables	EUR 0.00 (USD 0.00)	Clone	100%	11/19/2021, 4:...
3 NCSO-trial_TSS5_Jasone	ASST Papa Giovanni XXIII	Direct Reorder and Cust...	Reorder - Non Consorti...	Consumables	EUR 0.00 (USD 0.00)	Rename	100%	11/2/2021, 8:0...

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

New List View

* List Name

New List Name

Who sees this list view?

☒ Only I can see this list view

☐ All users can see this list view

☐ Share list view with groups of users

Cancel Save

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

The screenshot shows the 'Filter by Owner' configuration dialog in Salesforce. The 'Field' dropdown is set to 'Stage', the 'Operator' is 'equals', and the 'Value' field shows '6 options selected'. On the right, a yellow box highlights 'Filter by Owner' and 'All opportunities'. Below it, a section titled 'Matching all of these filters' contains a 'New Filter*' button. At the bottom, 'Add Filter' and 'Add Filter Logic' buttons are highlighted with orange boxes. The 'Save' button is at the top right.

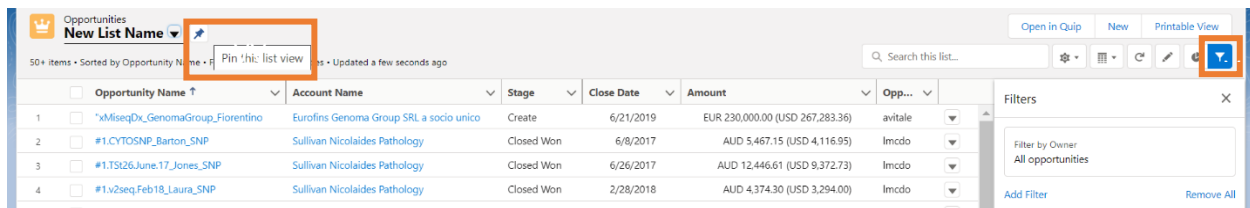
10. Select fields to display (columns) under List View Controls

The screenshot shows the 'Select Fields to Display' dialog. The 'Available Fields' list on the left includes '(DO NOT USE) Forecast Category', 'Abandon Reason', 'Abandoned Reason Details', 'Account Change', 'Account Name (Local)', and 'Account Owner Priority'. The 'Visible Fields' list on the right includes 'Opportunity Name', 'Account Name', 'Stage', 'Close Date', 'Amount', and 'Opportunity Owner Alias'. The dialog title 'Select Fields to Display' is highlighted with an orange box. In the background, the 'Filter by Owner' dialog is visible, with its 'Filter by Owner' and 'All opportunities' text highlighted by an orange box.

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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



The screenshot shows the Salesforce Opportunities list view. At the top, there's a header with 'Opportunities' and a 'New List Name' dropdown. Below this, a search bar and a 'Pin This List View' button (highlighted with an orange box) are visible. The table below has columns: Opportunity Name, Account Name, Stage, Close Date, Amount, and Opp... (highlighted with an orange box). The table contains four rows of data. On the right side, there's a 'Filters' panel with a search bar and a 'Filter by Owner' dropdown. The 'Filter by Owner' dropdown is currently set to 'All opportunities'.

	Opportunity Name	Account Name	Stage	Close Date	Amount	Opp...
1	*MiseqDx_GenomaGroup_Florentino	Eurofins Genoma Group SRL a socio unico	Create	6/21/2019	EUR 230,000.00 (USD 267,283.36)	avitale
2	#1.CYTOSNP_Barton_SNP	Sullivan Nicolaides Pathology	Closed Won	6/8/2017	AUD 5,467.15 (USD 4,116.95)	Imcdo
3	#1.T9t26June.17_Jones_SNP	Sullivan Nicolaides Pathology	Closed Won	6/26/2017	AUD 12,446.61 (USD 9,372.73)	Imcdo
4	#1.v2seq.Feb18_Laura_SNP	Sullivan Nicolaides Pathology	Closed Won	2/28/2018	AUD 4,374.30 (USD 3,294.00)	Imcdo