



salesforce

User Guide

Creating New Records

Learn how to create:

Accounts

Contacts

Cases

Chatter Posts



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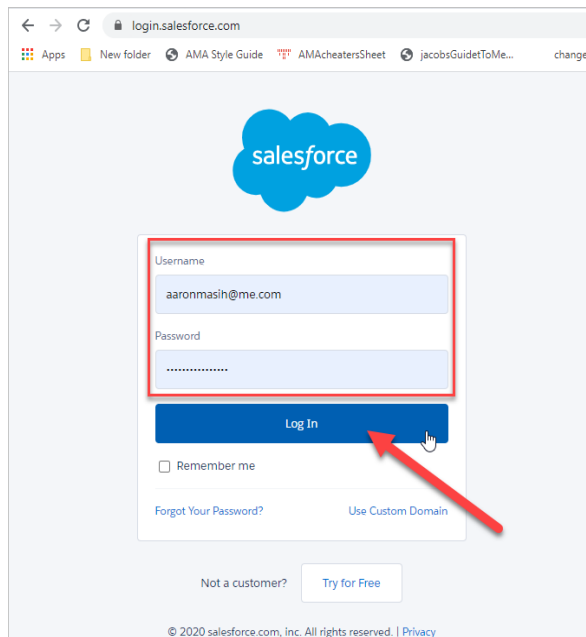
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1 Quick Start

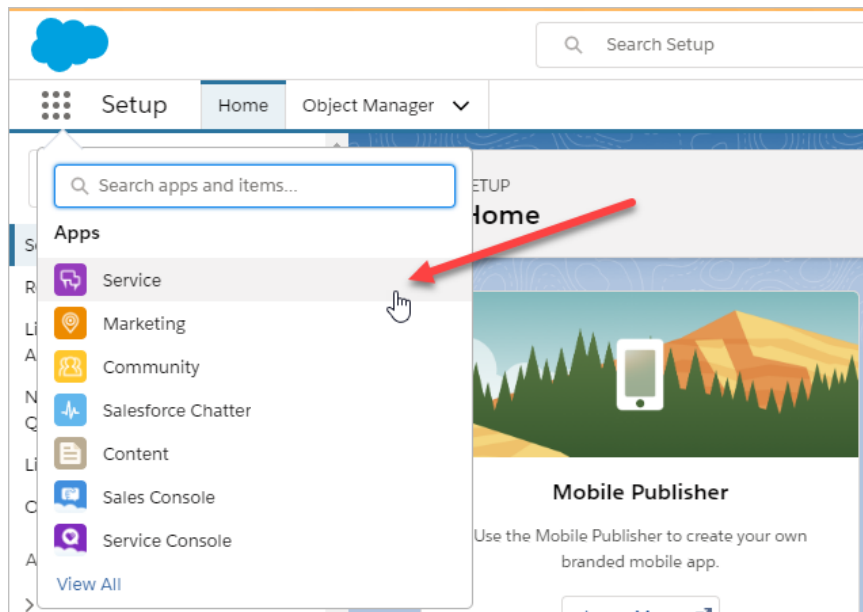
This is a quick start guide to access Accounts, Contacts, Case and Chatter features.

1) Go to **login.salesforce.com**.

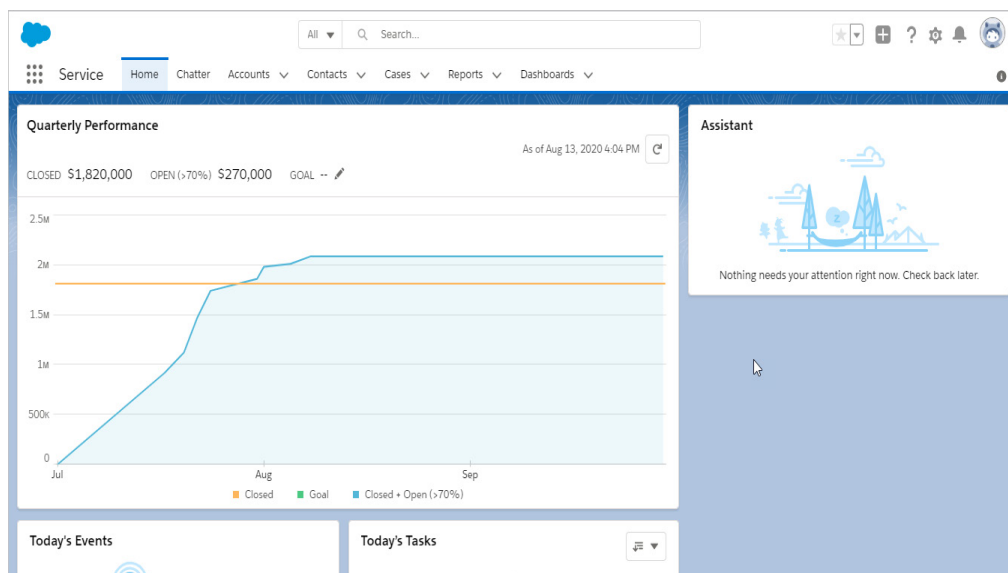
2) Enter the required **Username** and **Password**. Proceed to **Log In**:



3) Select **Service** from the App Launcher:



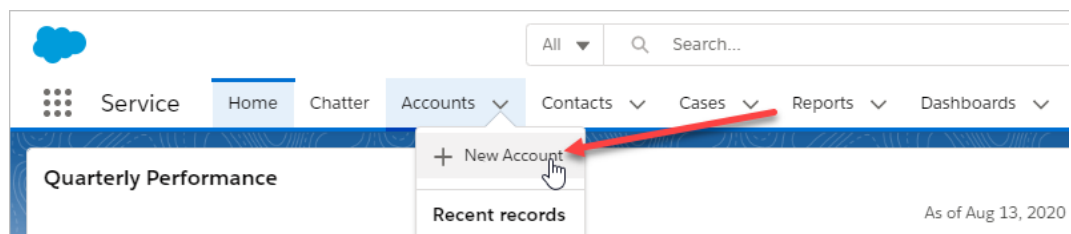
4) You are now at the **Service** section and able to access Accounts, Contacts, Case and Chatter functionalities:



2 How to Create an Account

Accounts store data relating to businesses or individuals you choose to work with.

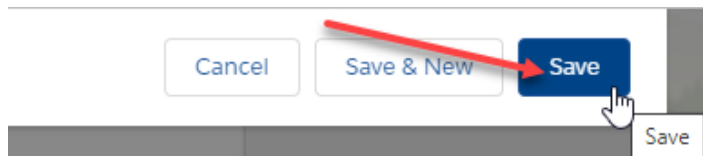
- 1) Select **New Account** from the top navigation bar:



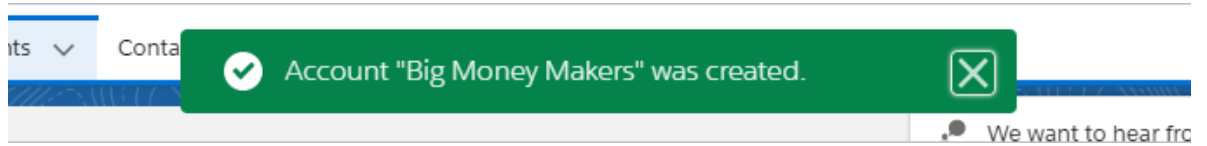
- 2) In the **New Account** window, enter information in the required field:

A screenshot of the 'New Account' form. The form is titled 'New Account' and contains several fields. The 'Account Name' field is highlighted with a red rectangle and contains the text 'Big Money Makers'. Other fields include 'Account Owner' (Aaron Masih), 'Rating' (dropdown menu), 'Phone', 'Fax', 'Parent Account' (search bar), 'Account Number', 'Website', 'Account Site', and 'Ticker Symbol'. At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

- 3) Add any additional information to the form.
- 4) Click **Save** at the bottom of the window:



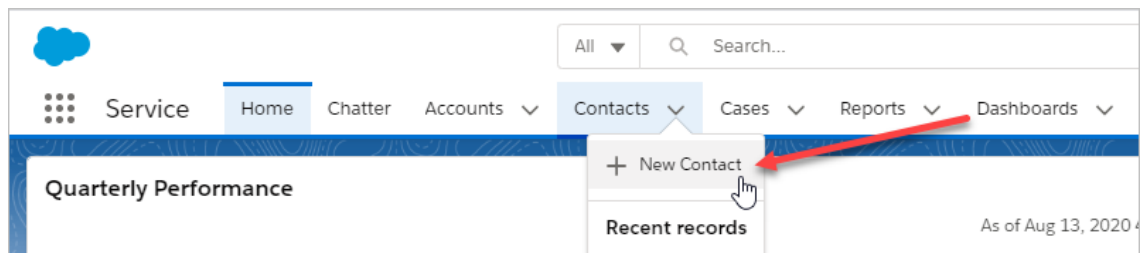
5) This green bar displays momentarily after your new **Account** is saved:



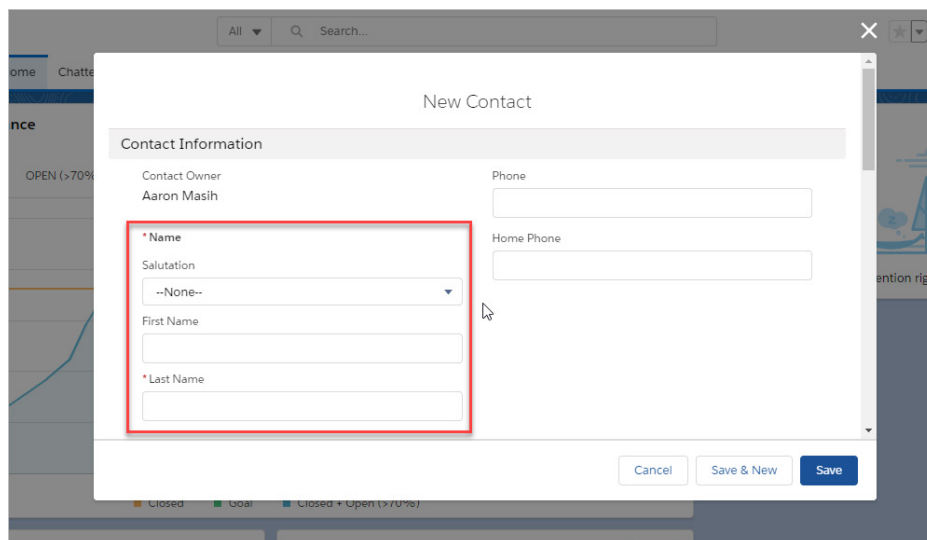
3 How to Create a Contact

Contacts store information about the people you do business with.
Contacts can be linked to accounts.

- 1) Select **New Contact** from the top navigation bar:



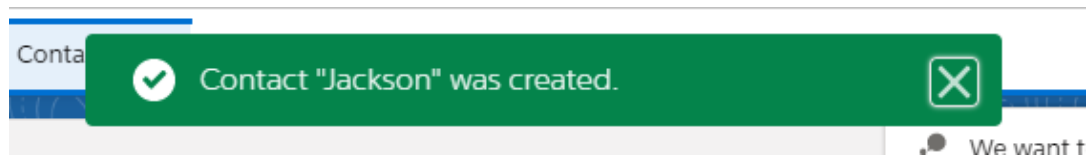
- 2) In the **New Contact** window, enter all required fields:



- 3) Click save at the bottom of the **New Contact** window:



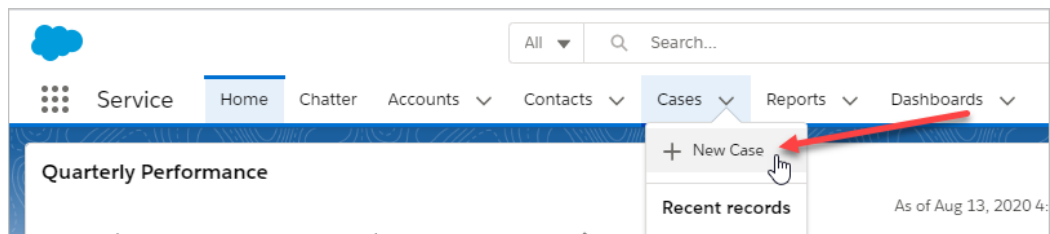
- 4) This green banner displays momentarily after your **Contact** has been created:



4 How to Create a Case

Create a case to keep a record of a customer's feedback, issue, or request.

- 1) Select **New Case** from the top navigation bar:



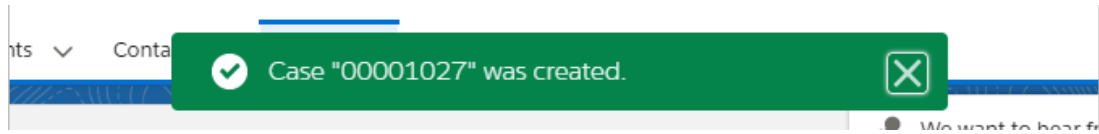
- 2) In the **New Case** window, enter all required fields:

A screenshot of the 'New Case' form. The form is titled 'New Case' and contains several fields. The 'Case Information' section includes 'Case Owner' (Aaron Masih), 'Case Number', 'Contact Name' (with a search bar), and 'Account Name' (with a search bar). The 'Status' field is a dropdown menu with 'New' selected, highlighted by a red box. The 'Priority' field is a dropdown menu with 'Medium' selected. The 'Case Origin' field is a dropdown menu with '--None--' selected, also highlighted by a red box. At the bottom of the form, there is a checkbox for 'Send notification email to contact' and three buttons: 'Cancel', 'Save & New', and 'Save'.

- 3) Click **Save** at the bottom of the window:



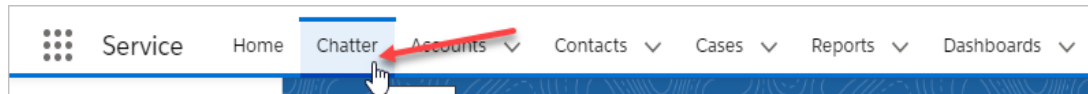
4) A green banner displays momentarily after your new **Case** is created:



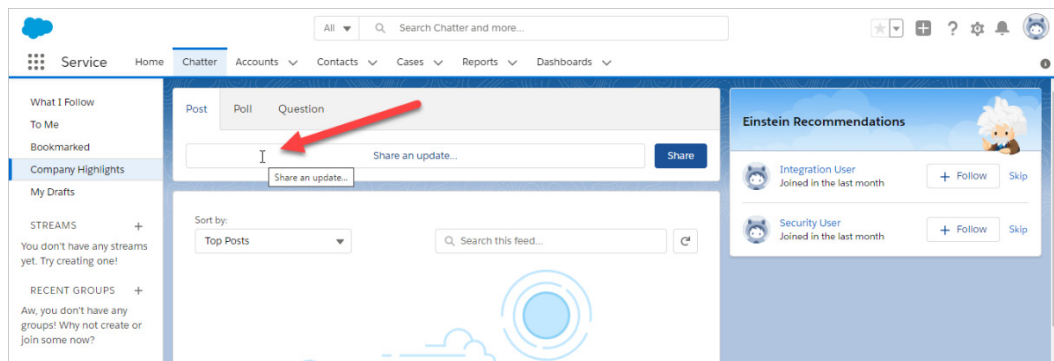
5 How to Create a Chatter Post

Create a Chatter post to share information and invite feedback from your colleagues.

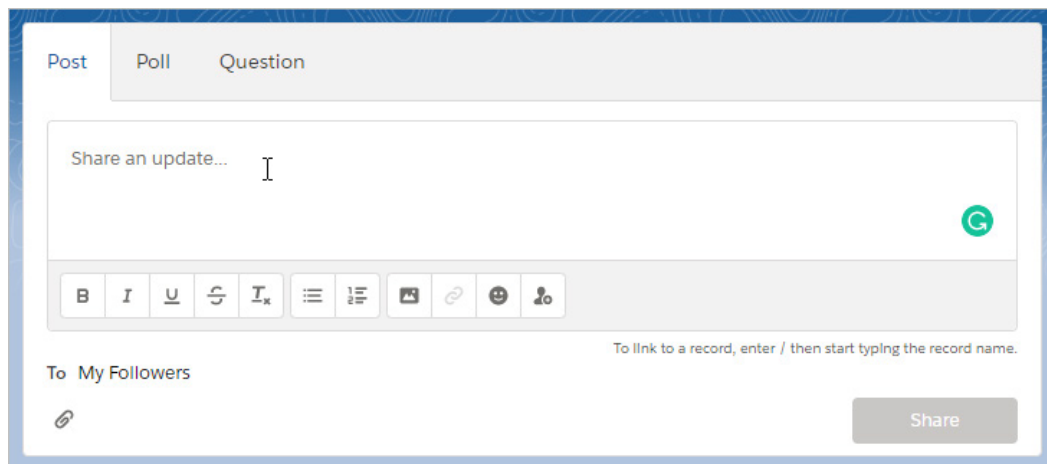
- 1) Select **Chatter** from the top navigation bar:



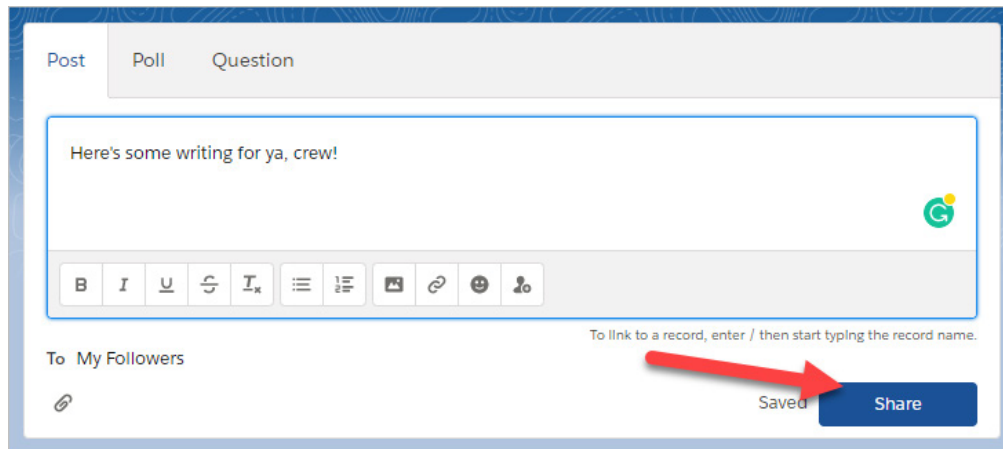
- 2) Click the text box to start sharing:



- 3) After clicking, the text box expands into a larger box with text-editing options:

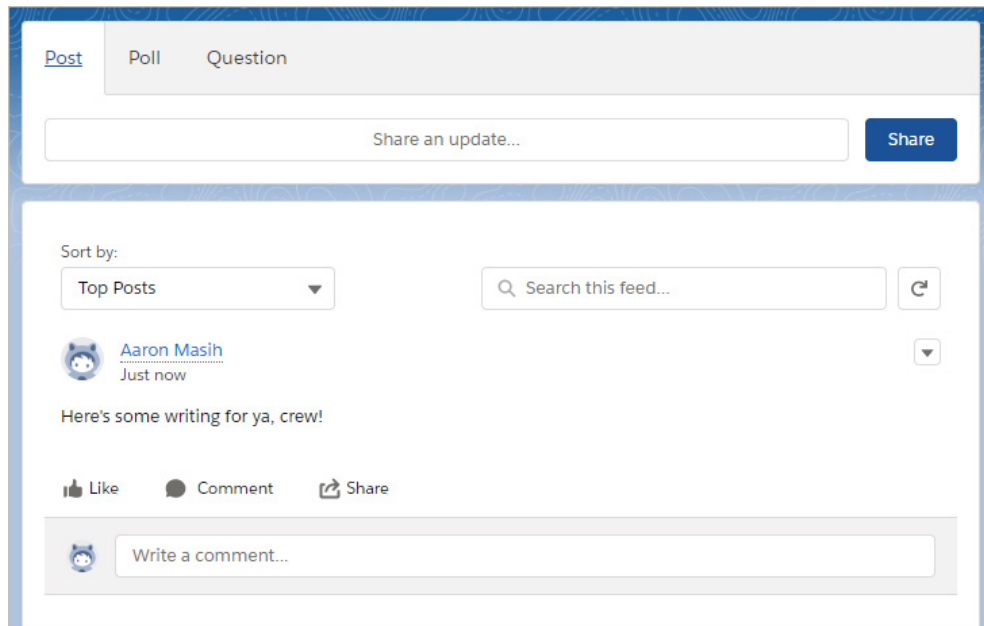


4) After completing your message, click **Share** to publish:



The screenshot shows the Chatter post creation interface. At the top, there are tabs for "Post", "Poll", and "Question". Below these is a text input area containing the text "Here's some writing for ya, crew!". To the right of the text is a green circular icon with a white 'G'. Below the text area is a toolbar with icons for bold (B), italic (I), underline (U), strikethrough (ABC), text color (T), background color (■), link (chain), image (img), and user mention (person). Below the toolbar, the "To" field is set to "My Followers". At the bottom right, there are two buttons: "Saved" and "Share". A red arrow points to the "Share" button. Above the "Share" button, there is a small text hint: "To link to a record, enter / then start typing the record name."

5) The **Chatter** post you just shared will appear in a feed below:



The screenshot shows the Chatter feed. At the top, there are tabs for "Post", "Poll", and "Question". Below these is a text input area with the placeholder "Share an update..." and a "Share" button. Below the input area, there is a "Sort by:" dropdown menu set to "Top Posts" and a search bar with the placeholder "Search this feed...". The feed itself shows a post by "Aaron Masih" with the text "Here's some writing for ya, crew!". Below the post, there are buttons for "Like", "Comment", and "Share". At the bottom, there is a comment input area with the placeholder "Write a comment..." and a small avatar icon.