



Salesforce User Guide

Account Executive - Sales



LEARNING&DEVELOPMENT

Accounts

Overview:

An Account in Salesforce is created for each Broker Company or Branch Location and houses details and related pages. Accounts are created by the Vendor Manager when a Broker Application Package is signed and approved. Only one Account Executive may be assigned to an Account at any time. Some Accounts in Salesforce are unowned (Owner = Available Broker) and may be contacted by any Account Executive to obtain ownership. Accounts are only visible to the Account Executive that is assigned and the Account Executive's Manager.

The screenshot shows the Salesforce interface for an Account record. The top navigation bar includes 'Sales', 'Home', 'Accounts', 'Accounts Pool', 'Contacts', 'Leads', 'Opportunities', 'Correspondent Accounts', 'Correspondent Contacts', and 'Correspondent'. The account name is 'Test Account West'. Below the name, there are tabs for 'Status' (Normal), 'Phone', 'Billing Address', 'Website', and 'Account Owner' (Tom Verdone). The main body of the record is divided into two columns. The left column contains fields: Account Name (Test Account West), Parent Account, NMLS (132828), Status (Normal), Website, Phone, Lender Paid Comp (No), LPC Tier, and CSC_ID (2214014). The right column contains fields: Account Owner (Tom Verdone), Protected Account (checkbox), Approval Date, Ownership Time Remaining, Days Since Last Opportunity, Section 4-5 Addendum (checkbox), Section 16 Addendum (checkbox), Anti Steering Attestation (checkbox), and Compliance Strikes. At the bottom, there is a section for 'Address Information' with a 'Billing Address' field.

Fields:

Account Name: Name of Broker Company

Account Owner: Account Executive assigned

Parent Account: Name of Parent Account if Account is a branch location

Protected Account: Checkbox to exclude from automatic ownership transfers

NMLS: NMLS ID

Approval Date: Date Broker or Branch was originally approved

Status: Current status of Account

Ownership Time Remaining: Days until system moves Account into available status

Website: Broker or Branch website

Phone Number: Broker or Branch Phone Number

Section 4-5 addendum: Broker Application Package information

Section 16 addendum: Broker Application Package information

Anti-Steering Attestation: Broker Application Package information

Lender Paid Compensation: Whether Broker/Branch is eligible for Lender Paid Compensation

LPC Tier: Lender Paid Compensation Tier which must be used by Broker/Branch

CSC ID: Unique Identifier

Compliance Strikes: Number of compliance findings associated with Broker/Branch

Address: Broker/Branch Address



Account Pool

Overview:

An Account Pool entry is automatically created and associated with every Account. The Account Pool page is designed to show limited account information to all Account Executives regardless of ownership. Before sending a Broker Application Package to a prospective Broker the Account Executive is required to check the Account Pool to confirm an entry does not already exist.

The screenshot shows a web application interface for the 'Account Pool' section. The top navigation bar includes links for Sales, Home, Accounts, Accounts Pool (selected), Contacts, Leads, Opportunities, Correspondent Accounts, Correspondent Contacts, and Correspondent. Below the navigation bar, the page title is 'Account Pool Test Account West'. The main content area is divided into two tabs: 'Related' and 'Details' (selected). The 'Details' tab displays a form with the following fields:

Field	Value
Account Pool	Test Account West
Owner	Tom Verdone
Account	Test Account West
City	
NMLS	132828
State	
CSC_ID	2214014
Zip Code	
Approval Date	
Status	Normal

Fields:

Account Pool: Name of Broker/Branch

Account: Name of Broker/Branch

Owner: Account Executive assigned to Broker/Branch

NMLS: NMLS ID

CSC ID: Unique Identifier

Approval Date: Date Broker/Branch was approved

Address: City, State, Zip of Broker/Branch

Status: Current status of Broker/Branch

Contacts

Overview:

A contact is an individual associated with a Broker Company or Branch Account. Account Executives are responsible for creating and maintaining the contact list for the Accounts they own. Calls and Emails to contacts are tracked and will be detailed below.

The screenshot displays the Citadel CRM interface. At the top, a navigation bar includes links for Sales, Home, Accounts, Accounts Pool, Contacts (selected), Leads, Opportunities, Correspondent Accounts, Correspondent Contacts, and Correspondence. Below the navigation bar, a header section identifies the contact as Michael Petersen. A summary row shows the Title, Account Name (TEST ACCT 1), Phone (2), Email (mpetersen@citadelservicing.com), and Contact Owner (Michael Petersen). The main content area is divided into three tabs: Details (active), Related, and News. The Details tab contains a form with the following fields: Name (Michael Petersen), Account Name (TEST ACCT 1), Title, Email (mpetersen@citadelservicing.com), Phone, NMLS (12421412), Contact Owner (Michael Petersen), Reports To, Department, Fax, and Mobile. Each field has a small edit icon to its right.

Fields:

Account Name: Account the Contact is associated with

Title: Contact's Job Title

Name: Contact's Name

Email: Contact's Email

Phone: Contact's Phone Number

NMLS: Contact's Personal NMLS ID (If applicable, if not leave blank)

Owner: Owner of the Contact Record

Reports To: Contact's Manager (if applicable and entered in Salesforce as a contact)

Department: Contact's Department

Fax: Contact's Fax Number

Mobile: Contact's Mobile Number

Address: Contact's Address

Guide:

1. To create a new contact, from the associated Account navigate to the Related tab. Under the Related Contacts section click the New Contact Button.
2. Fill the appropriate information into the fields on the New Contact screen which pops up.
3. Click the Save button to complete the Contact Creation Process
4. If entering more than one new Contact at a time click the Save and New button instead to bring up the next New Contact screen.

Loans

Overview:

Loans in Salesforce are automatically created to show transactions associated with the Broker Account/Branch. Limited information is displayed and is meant to be used as a quick reference for communicating loan status.

Related Details News

We found no potential duplicates of this Account.

Related List Quick Links

- Related Contacts (5)
- Loans (10+)
- Accounts Pool (1)
- Notes (0)
- Opportunities (10+)
- Files (0)

Related Contacts (5) New Contact Add Relationship

Yasmin Gonzalez Account Na... 1st Florida Lending Corp Title: Direct: <input checked="" type="checkbox"/>	Yasmin Gonzalez Account Na... 1st Florida Lending Corp Title: Direct: <input checked="" type="checkbox"/>	Sylvia Marchese Account Na... 1st Florida Lending Corp Title: Direct: <input checked="" type="checkbox"/>
Carlos Matos Account Na... 1st Florida Lending Corp Title: Loan Officer Direct: <input checked="" type="checkbox"/>	Tashema Rembert Account Na... 1st Florida Lending Corp Title: Loan Officer Direct: <input checked="" type="checkbox"/>	

[View All](#)

Loans (6+) New

Loan Number	Loan Amount	Loan Status	Loan Status Date
7029218	\$276,750	Canceled	9/23/2020
7029266	\$100,750	Closed	10/2/2020
7029641	\$135,200	Canceled	10/20/2020
7029672	\$171,750	Closed	11/4/2020
7029724	\$292,000	Canceled	10/21/2020
7029737	\$178,750	Closed	11/9/2020

[View All](#)

Fields:

Loan Number: Loan number from LOS

Loan Amount: Dollar Amount of the Loan

Loan Status: Status of the loan from LOS

Loan Status Date: Date of last status change

Activities

Overview:

The Activities panel is available on the Account Page and Contact Page. Activities are comprised of calls, emails, tasks, and events. This panel is used to log and track communication from the Account Executive. Any activity logged on a Contact Page will be displayed in the activity history of the related Account Page. Salesforce should be integrated with Microsoft Outlook (refer to Salesforce Integration Setup Guide). Account Executives are responsible for logging all calls and emails.

Activity

Log a Call

New Task

New Event

Email

Recap your call...

Add

Filters: All time • All activities • All types


Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

November • 2020

This Month

>  Test call

Yesterday

You logged a call with [A Greenstone](#)

No more past activities to load.

Guide:

Logging a Call:

1. From the Contact Page, under the Activity Section, under the Log a Call Section click the Add Button.

Activity

Log a Call New Task New Event Email

Recap your call... Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

November • 2020 This Month

> Test call Yesterday
You logged a call with [A Greenstone](#)

No more past activities to load.

2. In the Subject Box type the subject of the conversation
3. In the Comments Box type all relevant information from the call.
4. In the Name Box confirm the name of the contact and add any others if applicable.
5. In the Related To Box enter any additional accounts to relate the phone call to if applicable. (Normally not applicable)

Activity

Log a Call New Task New Event Email

* Subject
Intro Call

Comments
Reviewed current products and pricing

Name
Search Contacts...
Michael Petersen

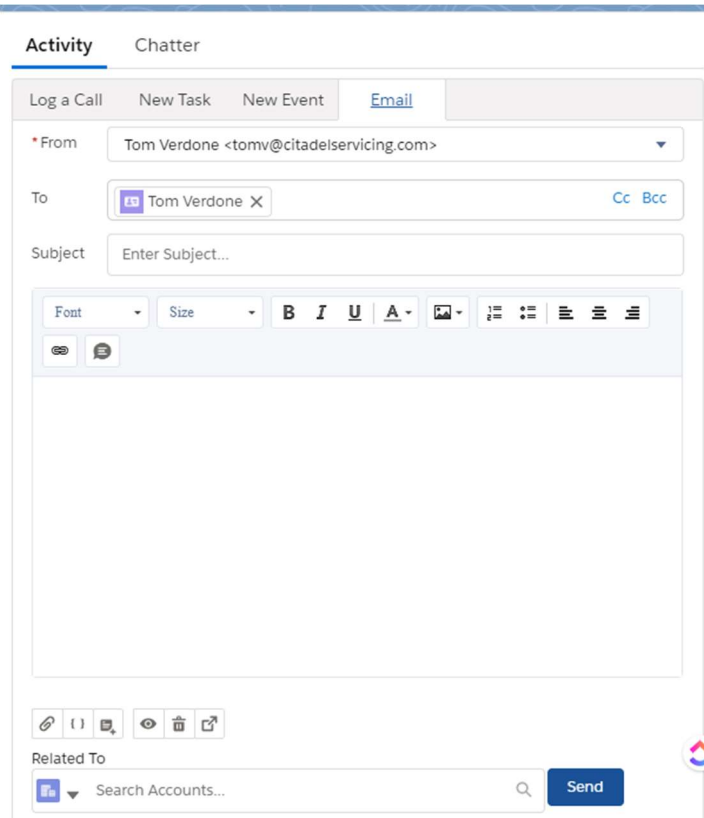
Related To
Test Account West

Save

6. When complete click the Save Button.

Sending an Email from Salesforce:

1. From the Contact Page, under the Activity Section, under the Email Section a blank email template will be available.
2. In the From Box confirm that your email is entered.
3. In the To Box confirm the email address of the Contact and add any others if applicable.
 - a. CC is available if necessary
4. In the Subject Box type the subject of the email.
5. In the Body Box type the message of the email.
6. In the Related To Box confirm the associated Account is selected.



The screenshot shows the Salesforce 'Email' composition window. At the top, there are tabs for 'Activity' and 'Chatter'. Below these are buttons for 'Log a Call', 'New Task', 'New Event', and 'Email'. The 'Email' tab is active. The form includes a 'From' field with 'Tom Verdone <tomv@citadelservicing.com>', a 'To' field with 'Tom Verdone' and 'Cc Bcc' links, and a 'Subject' field with the placeholder 'Enter Subject...'. Below these is a rich text editor with a toolbar containing options for font, size, bold, italic, underline, text color, background color, bulleted list, numbered list, indent, and outdent. The body of the email is a large text area. At the bottom, there are icons for attachments, links, and a 'Send' button. The 'Related To' section at the bottom shows a search bar with 'Search Accounts...' and a 'Send' button.

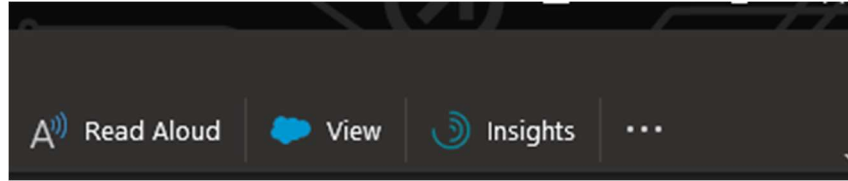
7. When complete click the Send Button.

Logging an Email from Microsoft Outlook (optional feature):

This requires an Outlook Add-In to be enabled (refer to Salesforce Integration Setup Guide)

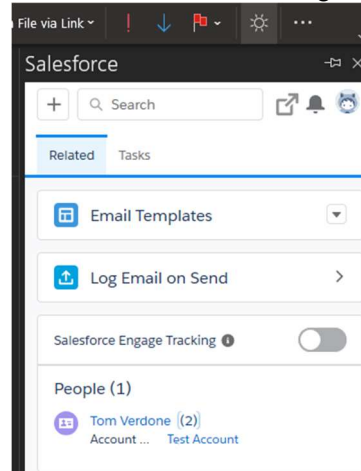
1. In Microsoft Outlook click the New Email button, Reply Button, or Reply All Button (as applicable).
2. In the Untitled – Message window that appears click the View Button with the blue Salesforce cloud icon.

1. If this icon is not visible click the button with three dots in a horizontal line and select from the dropdown menu.



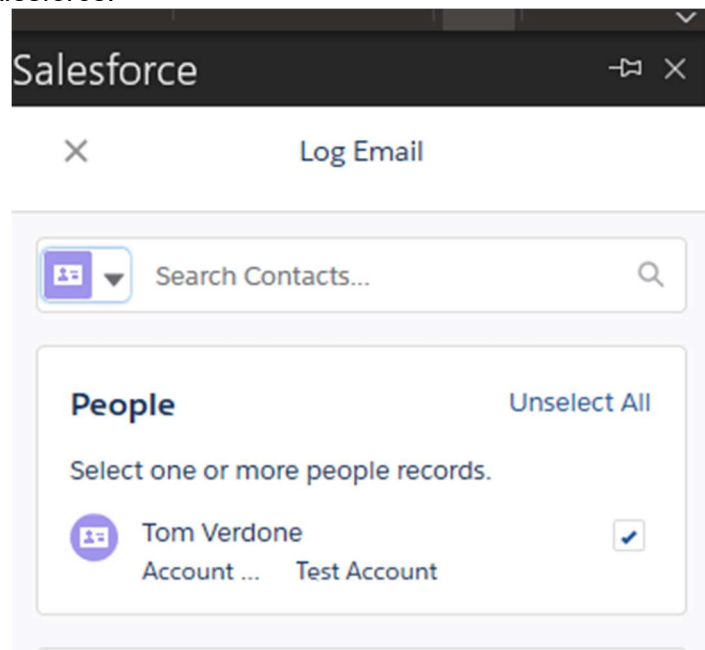
2. Compose the new email using the normal Microsoft Outlook process.

3. When ready to send in the Salesforce Add-In click the Log Email on Send button



Confirm all Salesforce Contacts are selected in the People Section which appears.

1. If an email recipient does not appear, confirm they have been created as a contact in Salesforce.



2. Click the Save Button
3. This will cause an email address to be added to the BCC box.

To	Tom Verdone
Cc	
Bcc	emailtosalesforce@vww72227pwfv1e93qlzg5c2e0h388enhb8k5kdw0ojkqvznxa.1i-2kpsauac.na73.le.salesforce.com

3. Send email using normal Microsoft Outlook process.
4. Logging can be confirmed by navigating to the specific Contact page in SalesForce.

Activity Chatter

Log a Call New Task New Event Email

Recap your call... Add


Filters: All time · All activities · All types ▼

[Refresh](#) · [Expand All](#) · [View All](#)

✓ Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

✓ November · 2020 This Month

 **New Employee Request** 8:28 AM | Today ▼
w@bupdates@citadeiservicing.com sent an email to ITsupport@citadeiservicing.com an...

Account Administration

Account Transfers

For Account Transfer requests email Brokers@citadelservicing.com and specify the Account requested.

Protecting Accounts

An Account executive may protect a number of accounts as decided by the National Sales Manager. Protecting an account will exclude the account from all automatic ownership transfers.

To protect an Account click the Protected Account Checkbox on the Account Page.

Protected Account 

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