

FAQ – Topics

Logging in &
Salesforce Navigation

Account Overview &
Integration with
Aperity

Accounts in
Salesforce

Account Ownership &
Account Teams

Contacts

Support



FAQ – Logging In & Salesforce.com Navigation

- Q: How do I log into Salesforce.com?
- A: You can log into Salesforce.com through the module on the STIR homepage, or via the URL. [Review these slides for details.](#)
- Q: What if I get an error message when logging into Salesforce.com?
- A: You will need to contact the service desk to ensure you have access to Salesforce.
- Q: How do I navigate Salesforce.com?
- A: [Review these slides for some navigation tips and tricks](#)
- Q: How do I search in Salesforce.com?
- A: There is a search box at the top of the page. [Review this slide for details.](#)
- Q: How can I update my time zone in Salesforce.com?
- A: Update your time zone via your personal settings. [Review this slide for details.](#)



FAQ – Account Overview & Integration with Aperity

- Q: What are the different accounts that Salesforce.com holds?
- A: Salesforce.com contains On Premise, Off Premise, Non-Premise, Account Distributors, and corporate accounts. [Review this slide for definitions.](#)
- Q: When do I use Aperity, when do I use Salesforce.com, and when do I use GoSpotCheck?
- A: [Review this slide for direction.](#)
- Q: How does the Aperity/Salesforce.com integration work?
- A: [Review these slides for an overview.](#)
- Q: What is the timing of the Aperity/Salesforce.com integration?
- A: The timing of the integration occurs once a week.

FAQ - Accounts in Salesforce

- Q: What are the different account views that have been set up for me, and how can I use those views?
A: [Please review these slides for an overview.](#)
- Q: Can I export the list that is returned in this view?
A: No you cannot. We will be getting more reporting functionality in the next release later this Fall, in which we will be able to export lists of data. But you cannot do this currently within the view functionality.
- Q: What are the different components of an account screen?
A: [Please review these slides for an overview](#)
- Q: How do I edit an Account?
A: [Please review this slide for instructions.](#)
- Q: How do I request a new account in Salesforce?
A: [Please review this slide for details.](#)



FAQ - Accounts in Salesforce (continued)

- Q: How do I create my own views?
- A: Please review these slides for instruction.

- Q: If I'm creating groupings of accounts in Salesforce, will that information then be saved, and then push back to Aperity?
- A: No – Aperity is the source for all account information and Accounts is pushed to Salesforce. Attributes may be pushed back from Salesforce to Aperity (i.e. Account & Execution Elements), but the grouping of information will not be pushed to Aperity. This is just a way to review data within Salesforce.



FAQ – Account Ownership & Account Teams

- Q: How is account ownership handled in Salesforce.com
- A: [Please review this slide for details.](#)

- Q: I need to take ownership of an account. What if my state doesn't have a COM?
- A: Contact your Admin.

- Q: What if I need to take ownership of several accounts per a role change?
- A: Contact the Sales360 team – they can mass reassign these accounts to you.

- Q: How do I set up a default account team?
- A: [Please review this slide for instructions](#)

- Q: How do I manage account teams for a specific account?
- A: [Please review this slide for instructions](#)



FAQ - Contacts

- Q: How is contact ownership handled within Salesforce.com?
- A: [Please review this slide for an overview](#)

- Q: What are the different details I can review regarding contacts?
- A: [Please review this slide for an overview.](#)

- Q: How do I create a new contact?
- A: [Please review these slides for instructions](#)

- Q: How do I edit an existing contact?
- A: [Please review this slide for instructions](#)

- Q: How do I share a contact with another person so they can make edits?
- A: [Please review this slide for instructions](#)

- Q: How do I associate a contact to more than one account?
- A: [Please review this slide for instructions](#)

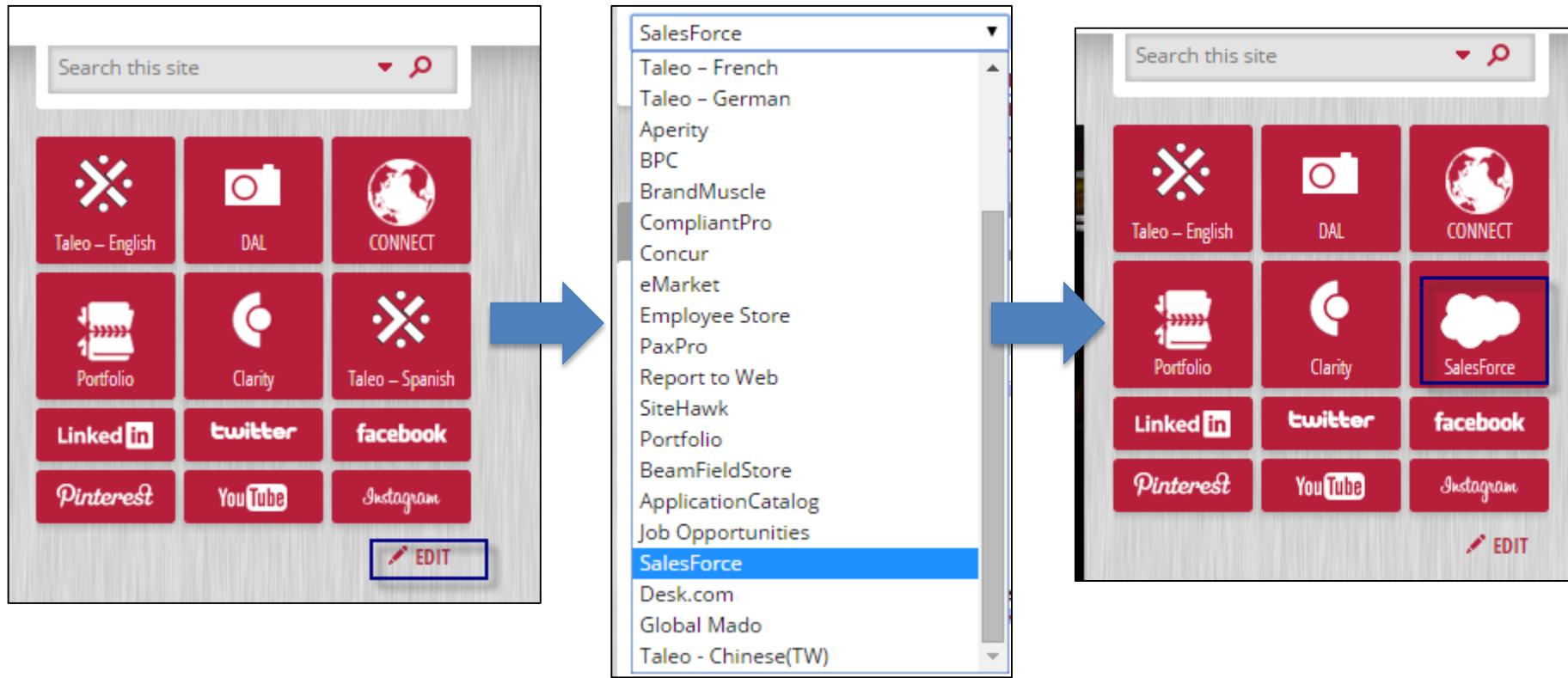


FAQ - Support

- Q: How do I troubleshoot?
- A: Please review this slide for instructions.

Logging in to Salesforce: Single Sign On

Navigate to the Stir homepage and add the Salesforce Module:

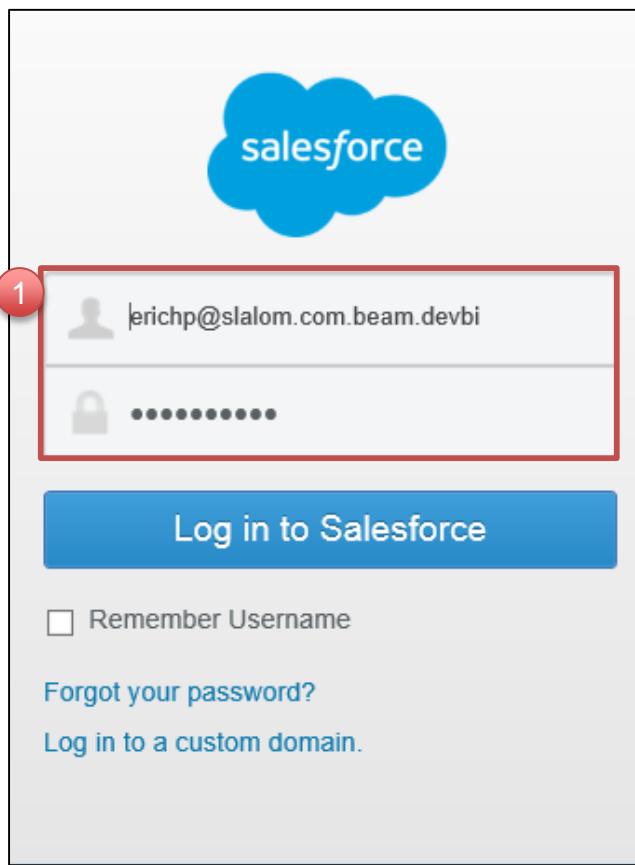


Once you click on the Salesforce module, you will be redirected and logged into Salesforce.com via Single Sign On functionality

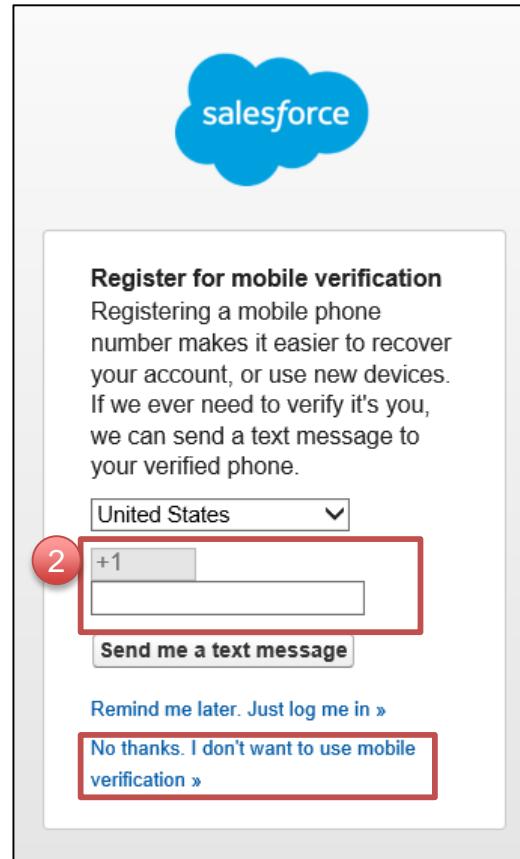


Logging in to Salesforce: Salesforce URL

Alternatively, you can navigate directly to <http://login.salesforce.com> or <https://beamsuntory.my.salesforce.com/> & enter your network credentials



The first screenshot shows the standard Salesforce login interface. It features a large blue cloud logo with "salesforce" in white. Below it is a red-bordered input field containing a user icon and the email address "erichp@slalom.com.beam.devbi". Directly below is another red-bordered input field containing a lock icon and a series of dots representing a password. A large blue button at the bottom reads "Log in to Salesforce". Below the button are three links: "Remember Username", "Forgot your password?", and "Log in to a custom domain.".



The second screenshot shows an optional step for mobile verification. It includes the same blue cloud logo and the "salesforce" text. A red circle labeled "1" points to the "Log in to Salesforce" button, indicating the primary action. A red circle labeled "2" points to a red-bordered input field containing "+1" and a blank text box, with a dropdown menu showing "United States". Below this is a "Send me a text message" button. At the bottom of the box are two options: "Remind me later. Just log me in »" and "No thanks. I don't want to use mobile verification »".

1 Login Prompt

2 Optional: Mobile Registration



Navigation

The screenshot shows the Beam Suntory Salesforce home page with several key features highlighted:

- 1 Search Bar:** Located at the top center, featuring a search input field and a search button.
- 2 Navigation Tabs:** Located at the top left, showing tabs for Home, Accounts, Contacts, and a plus sign for new items.
- 3 Recent Items:** A sidebar on the left containing a list of recent items, such as users (UAT Tester1, Fred Josephson, DC Smith) and accounts (BJS WHOLESALE CLUB, LIQUOR #109, Jane Doe, TH HARRIS P, AN Smith, 1003 LIQUORS, 1001 LIQUORS123).
- 4 Messages and Alerts:** A sidebar on the left displaying a scheduled maintenance notification for Sunday May 17th, 2015, from 2:00 a.m. to 2:25 a.m. CDT, stating that Salesforce will not be available during this time.
- 5 Reference Materials:** A sidebar on the left listing "Brand and Brand Quality Combinations".
- 6 Personal Settings, System Setup, Help & Training:** Located at the top right, showing user information (UAT Tester1), setup options, and help links.
- 7 Collaboration and updates made within the system:** A central feed area for UAT Tester1, showing a post from Tuesday August 18, 2015, asking "What are you working on?", a "Share" button, a sorting dropdown, and a message stating "There are no updates." A red box highlights this area with the number 7.

- 1 Search Bar
- 2 Navigation Tabs
- 3 Recent Items
- 4 Salesforce Maintenance Updates
- 5 Reference material/Training Guides
- 6 Personal Settings, System Setup, Help & Training
- 7 Collaboration and updates made within the system



Searching for a Contact or Account

The screenshot shows the Beam Suntory Salesforce home page. At the top, there is a search bar with a red circle containing the number '1' and a red box highlighting it. Below the search bar is a blue callout box with the text: "You can search for part of an account or contact name, the Store ID (TDLinx number) of an account, city, zip code, etc." To the right of the search bar, there is a red box containing the text: "For more information on Search, click [here](#)". In the center of the page, there is a search results section with a red circle containing the number '2' and a red box highlighting it. A blue callout box with the text: "Click the ‘Show More’ link to see all the search results" points to this section. On the left side of the page, there is a sidebar with sections for Recent Items, Messages and Alerts, and Reference Materials. The Recent Items section lists accounts like UAT Tester1, Fred Josephson, DC Smith, BJS WHOLESALE CLUB LIQUOR #109, Jane Doe, TH HARRIS P, AN Smith, 1003 LIQUORS, and 1001 LIQUORS123. The Messages and Alerts section informs about scheduled maintenance on Sunday May 17th, 2015, from 2:00 a.m. to 2:25 a.m. CDT, stating that Salesforce will not be available during this time. The Reference Materials section lists Brand and Brand Quality Combinations.

1 Search Bar

2 Sample Search Results by Category

You can search for part of an account or contact name, the Store ID (TDLinx number) of an account, city, zip code, etc.

For more information on Search, click [here](#).

Click the “Show More” link to see all the search results

1 Search Bar

2 Sample Search Results by Category

Search Results

Records

Accounts (25+)

Account Surveys (0)

Activities (0)

Attachments (0)

Contacts (2)

Opportunities (0)

Documents (0)

Files (0)

Groups (0)

Key Market Goals (0)

Notes (0)

Opportunities (0)

People (0)

Programs (0)

Reports (0)

Topics (0)

Actions

Account Name

Store ID

Billing Street

Billing City

Billing State/Province

Billing Zip/Postal Code

Billing Country

Accounts (25+)

Actions

Name

Account Name

Title

Primary Role

Work Phone

Mobile

Email

Contacts (2)

Action	Account Name	Store ID	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code	Billing Country
Edit	BJS WHOLESALE CLUB LIQUOR #109	TDL1475934	4000 OAKWOOD BLVD	HOLLYWOOD	Florida	33020	United States
Edit	BJS WHOLESALE CLUB LIQUOR #133	TDL1713102	4270 W STATE ROAD 46	SANFORD	Florida	32771	United States
Edit	BJS LIQUOR	TDL2009837	3400 SE FEDERAL HWY	STUART	Florida	34997	United States
Edit	BJS WHOLESALE CLUB LIQUOR #171	TDL1991332	8046 PHILIPS HWY	JACKSONVILLE	Florida	32256	United States
Edit	BJS WHOLESALE CLUB LIQUOR #387	TDL7344803	7050 CORAL WAY	MIAMI	Florida	33155	United States

Show More

Action	Name	Account Name	Title	Primary Role	Work Phone	Mobile	Email
Edit	Mr. Dan Philcox	BJS WHOLESALE CLUB LIQUOR #129	asdf	Chef	(774) 512-5506		dphilcox@bjsl.com
Edit	Mrs. Gina Langone	BJS WHOLESALE CLUB LIQUOR #133	Buyer Spirits, Wine	Other	(413) 593-0131		glangone@bjsl.com

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Verify/Update Your Time Zone

Verify your time zone via your personal settings:

1. Click your name, and then “My Settings”
2. Click “Personal” on the left side, then “Language & Time Zone”
3. Review and update the time zone if necessary
4. Click the “Save” button

The screenshot shows the Beam Suntory Salesforce user interface. At the top, there is a navigation bar with a search bar and a 'Search' button. On the right, there is a user profile dropdown menu for 'Jenny Framularo' with options for 'My Profile', 'My Settings' (which is highlighted), and 'Logout'. Below the navigation bar, the main content area has a 'Home' tab and a 'Accounts' tab. A sidebar on the left is titled 'My Settings' and contains several links: 'Personal' (which is highlighted with a red circle containing the number 2), 'Personal Information', 'Change My Password', 'Language & Time Zone' (which is also highlighted with a red circle containing the number 2), 'Grant Account Login Access', 'My Groups', 'Connections', 'Login History', 'Approver Settings', and 'Advanced User Details'. The main content area is titled 'Language & Time Zone' and has a 'Settings' section. This section includes fields for 'Time Zone' (set to '(GMT-05:00) Central Daylight Time (America/Chicago)'), 'Locale' (set to 'English (United States)'), 'Language' (set to 'English'), 'Currency' (set to 'USD - U.S. Dollar'), and 'Email Encoding' (set to 'General US & Western Europe (ISO-8859-1, ISO-LATIN-1)'). At the bottom of the settings section are 'Save' and 'Cancel' buttons, with a red circle containing the number 4 highlighting the 'Save' button.



Accounts within Salesforce

Accounts are the businesses that Beam Suntory does business with

In our sales360 launch, we will hold details around the following accounts within Salesforce:

Account Type	Description
On Premise	A business that has potential to sell Beam Suntory product, in which is consumed within the grounds of the business.
Off Premise	A business that has potential to sell Beam Suntory product, in which cannot be consumed within the grounds of the business.
Distributor	An account that purchases Beam Suntory products, and distributes to on and off premise businesses.
Corporate	The national headquarters of an on or off premise account. Beam Suntory product is not sold from this specific location.
Non Premise	A partner, such as Media, Agency, Event, Charity, Industry Association, or Brand Partner, that interacts with Beam Suntory, Inc. businesses in the local market.



When to Use What?

sales360
Powered by Salesforce.com

is the project customizing the

salesforce .com platform for Beam

salesforce

Aperity

GO | SPOTCHECK

Contains	Integration With	Usage
<ul style="list-style-type: none"> Source system for contacts Source system for account execution elements Source system for budget and funds for Brand Investment Program management and Program Calendar Account management and Opportunities Collaboration and Content 	<ul style="list-style-type: none"> SAP Aperity 	<ul style="list-style-type: none"> Locate contact and account data Manage contact data and account execution elements BI Campaign management and forecasting Programing creation and management throughout the year Cross-team collaboration and sharing on Accounts and Programs
<ul style="list-style-type: none"> All sales and retail data (from distributor depletion to retailer) Brand's depletions from wholesaler to retailers within US 	<ul style="list-style-type: none"> GoSpot Check Salesforce 	<ul style="list-style-type: none"> Evaluate channel, performance Distribution KPI's on our strategic brands
<ul style="list-style-type: none"> Survey collection that allows Beam Suntory to track performance against certain programs/incentives Surveys for the field to complete 	<ul style="list-style-type: none"> Aperity 	<ul style="list-style-type: none"> Capture data for various incentives, pricing, and merchandising activity Record a completion of a survey

*Blue text indicates functionality available later this year

sales360
Powered by Salesforce.com

Account Integration with Aperity



On Premise, Off Premise, and Distributor Accounts will be sourced from Aperity on a weekly basis:

The following fields will be kept in sync with Aperity on a weekly basis:

- Account Name
- Store ID
- Value Segmentation Tier
- Trade Channel
- Sub Channel
- Corporate Account
- Status
- Account Type
- Region
- Division
- Territory
- State
- Marketing Group
- DMA
- Concept Owner
- Billing Address

Account Integration with Aperity



Once per week

Over weekend



**The integration will occur on a weekly basis;
This means that updates will be available weekly**



Account Integration with Aperity



Account & Execution Elements, formally held in GoSpotCheck, should be updated by **reps** in Salesforce and sent back to Aperity

The existing GoSpotCheck survey has sourced the data in the system today, but will now be retired





Account Ownership

Meaning: If you are the owner of an account, this means you are responsible for maintaining the relationship and updating the Non-Aperity driven information within Salesforce such as “Is POS Allowed, Are Samplings Allowed, Window Displays, etc.”

Process to take ownership: If you need to take ownership of an account, follow these steps:

1. Notify your COM or Admin via email, copying your direct manager, and provide the Store ID (TDLinx number) or the URL of the account page
2. The COM or Admin will reassign the account to you

Account ownership can be shared by using Account Teams

Not applicable to
Sales Strategy team



New Accounts

New On Premise, Off Premise, and Distributor Accounts will be migrated from Aperity via the weekly Aperity integration.

For new Non-Premise accounts, follow these steps to have it be created in Salesforce:

1. Navigate to the “New Account Request Form” document that is posted in the Salesforce Reference Materials
2. Download a copy of the form
3. Fill out the details on the form
4. Send to the sales360@beamsuntory.com mailbox
5. The Salesforce Admin will check to see if the account already exists, and if it does not exist, the Salesforce Admin will create the account and notify you

Not applicable to
Sales Strategy team



Reviewing Accounts Views

Beam Suntory

Search...

Home Contacts **Accounts**

Recent Items

- Alabama Abc Board
- contactfromAccount check
- Then Test
- BJS WHOLESALE CLUB LIQUOR #109
- 67 Wine & Spirits
- Thenmozhi test
- Then Go
- INDEPENDENT - GROCERY
- Jenny Framularo
- 1001 LIQUORS123

Messages and Alerts

Click the Accounts Tab to review Accounts

Accounts Home

View: My Off Premise Accounts

- All Accounts
- All Corporate Accounts
- All Distributors
- All Non-Premise Accounts
- All Off Premise Accounts
- All On Premise Accounts
- My Accounts
- My Corporate Accounts
- My Distributors
- My Non-Premise Accounts

Rece... Accounts Alabama 101 C BJS V CLUB #102 My Off Premise Account My On Premise Account Recently Viewed Account

There are two views setup for each of the account types: ones you own, and all

You can click a letter to jump to records that start with that letter

You can change the number of records you see within one page of a view

You can click a different column header to sort the view differently

Action	Account Name	Store ID	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code	Billing Country	Ac...
Edit +	#4589 CVS	TMP130368				30813	O	
Edit +	#5 S & A GROCERY	TMP1375...				77380	O	
Edit +	\$MILFORDS MAR...	TDL1534590				4461	O	
Edit +	** THREE SPIRITS...	TDL0759713				0	O	
Edit +	*CHESTER COUN...	TDL1447609				0	O	
Edit +	*KAPTAINS KEG	TMP281_36035				99901	O	
Edit +	*WALGREEN'S #11...	TMP113_88383091	6215 SE TUALATI...	HILLSBORO	OR	97123	O	
Edit +	007 LIQUORS	TDL7010284	1584 S WILSON RD	RADCLIFF	KY	40160	O	
Edit +	010 CARLUCCIS	TDL7716381	876 CENTERTON RD	MT LAUREL	NJ	0	O	
Edit +	020 YORKTOWN...	TDL1472938	BLDG 2047 LEBAN...	YORKTOWN	VA	23694	O	
Edit +	025 CALDINI'S WI...	TDL7716382	6705 BLK HORSE ...	EGG HARBOR. TWP.	NJ	0	O	
Edit +	1&1 CARRY OUT	TDL1656910	1550 N MONROE ST	BALTIMORE	MD	21217	O	
Edit +	12.7 LIQUOR MAR...	TDL1397682	1000 N SANBORN ...	SALINAS	CA	93905	O	
Edit +	1 AM MARKET	TDL0423135	1931 NE STEPHEN...	ROSEBURG	OR	97470	O	
Edit +	1 BETTER LIQUOR...	TDL1407138	234 HIGHWAY 11 E	GREENBUSH	MN	56726	O	

1-25 of 2000+ 0 Selected ◀ Previous Next ▶ Page 1

Reviewing Accounts

Account
007 LIQUORS

Customize Page | Printable View | Help for this Page ?

[Post](#) [File](#) [New Task](#) [More](#) [Share](#) [Follow](#)

Write something... [Followers](#)

No followers.

There are no updates.

[Back to List: Accounts](#)

[Contacts](#) | [Account Team](#)

Account Detail [Edit](#)

Account Name	007 LIQUORS [View Hierarchy]	Account Owner	Integration Account [Change]
Store ID	TDL7010284	Account Record Type	Off Premise
Total Value Segmentation Tier	Bronze	Phone	
Tequila Tier		Region	
Vodka Tier		Division	
Whiskey Tier		State	Kentucky
Trade Channel	Large Format Liquor	Territory	
Sub Channel	Conventional Liquor	Marketing Group	NO GROUP ASSIGNMENT
Corporate Account	INDEPENDENT - LIQUOR	DMA	LOUISVILLE KY
Status	Open Store		

Address

Billing Address: 1584 S WILSON RD RADCLIFF, KY 40160

Map data ©2015 Google

Account & Execution Elements

POS	Cross Merchandising
Bins / Counter Units	Window / Door Signage
Racks / End Caps	Max Large Brand Display Potential
Floor Stacking	Typical Large Brand Display Size
Window Display	Typical Display Size All Other
Samplings	

Social Media

Facebook URL	
Instagram Handle	
Twitter Handle	

[Edit](#)

Contacts [New Contact](#) [Contacts Help](#)

No records to display

Account Team [Add](#) [Account Team Help](#)

No team members

[Back To Top](#) Always show me [more](#) records per related list

Reviewing Accounts (continued)

The screenshot shows a Salesforce Account page for '007 LIQUORS'. At the top left is a folder icon labeled 'Account'. The account name '007 LIQUORS' is displayed prominently. On the right side of the header are links for 'Customize Page', 'Printable View', and 'Help for this Page'. Below the header is a navigation bar with 'Post', 'File', 'New Task', and 'More' options. A 'Share' button is located on the right of the navigation bar. A 'Follow' button with a plus sign is also present. A 'Followers' section below it indicates 'No followers.' A search bar with placeholder text 'Write something...' is positioned above the update feed.

Account “Hover Links” to related contacts and Account Team

There are no updates. A link to 'Back to List: Accounts' is shown. Below the main content area, there are two sections: 'Account Detail' and 'Account Owner' information.

Account Detail

Account Name	007 LIQUORS [View Hierarchy]
Store ID	TDL7010284
Total Value Segmentation Tier	Bronze
Tequila Tier	
Vodka Tier	
Whiskey Tier	
Trade Channel	Large Format Liquor
Sub Channel	Conventional Liquor
Corporate Account	INDEPENDENT - LIQUOR
Status	Open Store

Account Owner

Account Owner	Integration Account [Change]
Account Record Type	Off Premise
Phone	
Region	
Division	
State	Kentucky
Territory	
Marketing Group	NO GROUP ASSIGNMENT
DMA	LOUISVILLE KY

Phone number and Owner information is managed in Salesforce

Account data sourced from Aperity

Reviewing Accounts (continued)

Address

Billing Address 1584 S WILSON RD RADCLIFF, KY 40160



Map data ©2015 Google

Address information linked to Google Maps

Driving directions

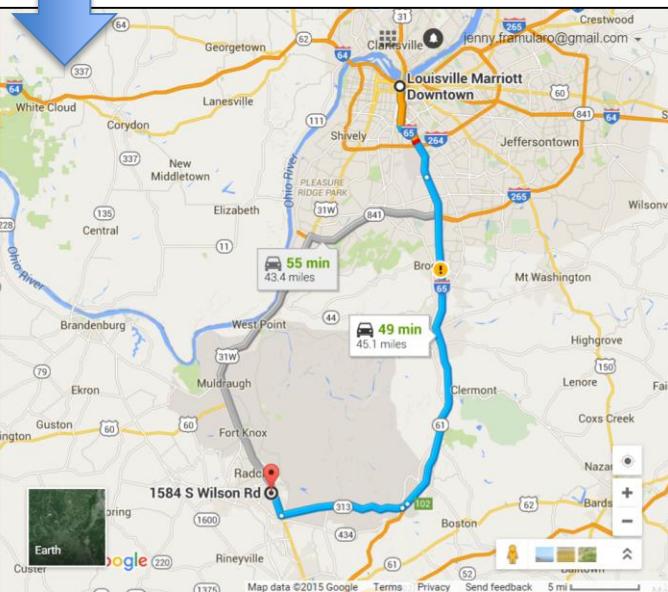
via I-65 S
49 min
43 min without traffic · Show traffic

Louisville Marriott Downtown
280 West Jefferson Street, Louisville, KY 40202

- > Get on I-65 S from W Liberty St
2 min (0.5 mi)
- > Follow I-65 S to KY-313 N/Joe Prather Hwy in Hardin County. Take exit 102 from I-65 S
29 min (33.2 mi)
- > Continue on KY-313 N/Joe Prather Hwy. Drive to S Wilson Rd in Radcliff
13 min (11.4 mi)

1584 S Wilson Rd
Radcliff, KY 40160

These directions are for planning purposes only. You may find that construction projects, traffic, weather, or other events may cause conditions to differ from the map results, and you should plan your route accordingly. You must obey all signs or notices regarding your route.





Reviewing Accounts (continued)

Account & Execution
Elements to be maintained
by Sales Reps

▼ Account & Execution Elements

POS ⓘ

Bins / Counter Units ⓘ

Racks / End Caps ⓘ

Floor Stacking ⓘ

Window Display ⓘ

Samplings ⓘ

Cross Merchandising ⓘ

Window / Door Signage ⓘ

Max Large Brand Display Potential ⓘ

Typical Large Brand Display Size ⓘ

Typical Display Size All Other ⓘ

▼ Social Media

Facebook URL

Instagram Handle

Twitter Handle

Edit

Social Media Handles

Contacts

New Contact

No records to display

List of related contacts

Account Team

Add

No team members

▲ Back To Top

Always show me ▼ more records per related list

List of Account Team Members (people who have access to edit the account)



Editing Accounts

There are two ways to edit a record:

- Click the “Edit” button, edit the appropriate fields in the Edit page, and save
- Double click the field you would like to edit, make the change, and save the updates

A

Click the “Edit” button to open the Edit page

Account Detail

Account Name	007 LIQUORS [View Hierarchy]	Account Owner	Integration Account [Change]
Store ID	TDL7010284	Account Record Type	Off Premise
Total Value Segmentation Tier	Bronze	Phone	
Tequila Tier		Region	
Vodka Tier		Division	
Whiskey Tier		State	Kentucky
Trade Channel	Large Format Liquor	Territory	
Sub Channel	Conventional Liquor	Marketing Group	NO GROUP ASSIGNMENT
Corporate Account	INDEPENDENT - LIQUOR	DMA	LOUISVILLE KY
Status	Open Store		

You can only edit accounts you own or are part of the account team.

These are the only sections on an account that are editable

Execution Elements

POS	Yes
Bins / Counter Units	Both
Racks / End Caps	None
Floor Stacking	No
Window Display	Yes
Samplings	Yes

Cross Merchandising Yes - Beer

Window / Door Signage Yes

Max Large Brand Display Potential Bin (1-3 phys cs)

Typical Large Brand Display Size Bin (1-3 phys cs)

Typical Display Size All Other Bin (1-3 phys cs)

Social Media

Facebook URL	
Instagram Handle	
Twitter Handle	

Save Cancel

B

You must click the “Save” button, otherwise your changes will be lost!

Not applicable to Sales Strategy team

▼ Execution Elements

POS	Yes
Bins / Counter Units	Both
Racks / End Caps	None
Floor Stacking	Both
Window Display	End Caps
Samplings	None

Cross Merchandising Yes - Beer

Window / Door Signage Yes

Max Large Brand Display Potential Bin (1-3 phys cs)

Typical Large Brand Display Size Bin (1-3 phys cs)

Typical Display Size All Other Bin (1-3 phys cs)

Default Account Teams

Set up your default Account Team via your personal settings:

1. Click your name, and then “My Settings”
2. Click “Personal” on the left side, then “Advanced User Details”
3. Hover over the Default Account Team link, and then click the “Add” button

The screenshot shows the Beam Suntory Salesforce user interface. The top navigation bar includes 'Search...', 'Search', 'UAT Tester1' (with a dropdown menu for 'My Profile', 'My Settings', and 'Logout'), 'Setup', and 'Help & Training'. A 'Discover Summer '15' button is also present.

The main content area displays 'Recent Items' for 'UAT Tester1' (Wednesday August 19, 2015) and a 'Hide Feed' button. On the left, a sidebar titled 'My Settings' has a 'Personal' tab selected (indicated by a red circle with '2'). Other tabs include 'Recent Items', 'Accounts', 'Contacts', and '+'. The 'Personal' tab contains links for 'Personal Information', 'Change My Password', 'Language & Time Zone', 'Grant Account Login Access', 'My Groups', 'Connections', 'Login History', and 'Approver Settings'.

The central area is titled 'Advanced User Details' and shows the 'Default Account Team' section. It includes an 'Add' button and a table listing account team members. The table columns are 'Name', 'Role', and 'State Manager - East and West Regions'. One row is listed: 'UAT Tester1' (Role: User License, State Manager: Salesforce). Below the table are fields for 'Alias', 'Email', 'Username', 'Nickname', 'Title', 'Company', 'Department', 'Division', 'Address', 'Time Zone', 'Locale', 'Mobile Configuration', 'Mobile Push Registrations', 'Accessibility Mode', and 'Color-Blind Palette on Charts'.

A green callout box in the bottom-left corner states: "Not applicable to Sales Strategy team".



Default Account Teams (continued)

Set up your default Account Team via your personal settings:

4. Search for another user you want to give access to your accounts to
5. Set the Account & Contact access
6. Set the Team Role
7. Repeat for each row
8. Click the “Save” button when you are done

The screenshot shows the 'Advanced User Details' section under 'My Settings' in the sidebar. The main area is titled 'Add Members' with the sub-instruction: 'Your default account team should include the users that normally work with you.' It includes two checkboxes: 'Automatically add my default account team to accounts that I create or accounts that are transferred to me' and 'Update account teams with these members'. A blue callout box points to the second checkbox with the text: 'You can choose to automatically add this team to all account you own'.

The central part of the screen displays a table for adding team members. The first column, 'Team Member', contains five dropdown menus, each with a red circle containing the number '4'. The second column, 'Account Access', has four dropdown menus, each with a red circle containing the number '5'. The third column, 'Contact Access', also has four dropdown menus, each with a red circle containing the number '5'. The fourth column, 'Opportunity Access', and the fifth column, 'Case Access', both have four dropdown menus each, each with a red circle containing the number '5'. The last column, 'Team Role', contains a dropdown menu with a red circle containing the number '6'. At the top right of this table area are three buttons: 'Save' (with a red circle containing the number '8'), 'Save & More', and 'Cancel'. A blue callout box at the bottom left points to the 'Team Member' dropdowns with the text: 'Access Level: Give your team members Read Only or Read /Write Access to the account and the related contacts.'

Setting Up an Account Team

Specify the Account Team on one of your accounts. When you have an Account page displayed, follow these steps:

1. Hover over the “Account Team” link or navigate to the Account Team Section
2. Click the “Add Default Team” button to add the default team you specified in your personal settings. The screen will refresh with your default team added
3. Click the “Add” button to add an individual

The screenshot shows the Salesforce Account page for 'BJS WHOLESALE CLUB LIQUOR #109'. At the top, there's a navigation bar with 'Account' and the account name. On the right, there are links for 'Customize Page', 'Printable View', and 'Help for this Page'. Below the navigation, there are buttons for 'Show Feed', 'Click to add topics', and a backlink to 'Back to List: Accounts'. The main content area has tabs for 'Contacts [1]' and 'Account Team [0]'. The 'Account Team' tab is highlighted with a blue border and has a red number '1' above it. Below this, there's a section titled 'Account Team' with a folder icon, an 'Add' button (with a red number '3' below it), an 'Add Default Team' button (with a red number '2' below it), and a 'Help' link. A green callout box at the bottom left states 'Not applicable to Sales Strategy team'.

Not applicable to
Sales Strategy team



Setting Up an Account Team (continued)

Add individuals to a specific account's Account Team:

4. Search for a user in which you want to give access to your account
5. Set the Account & Contact access
6. Set the Team Role
7. Repeat for each row
8. Click the “Save” button when you are done

The screenshot shows the 'New Account Team Members' page in Salesforce. At the top, there are tabs for Home, Accounts (which is selected), Dashboards, Reports, Marketing Plans, Campaigns, and Marketing Plan Transfers. Below the tabs, the account name 'BJS WHOLESALE CLUB LIQUOR #109' is displayed. The main area has a title 'New Account Team Members'. On the left, there is a 'Team Member' section with five dropdown menus, each with a red circle containing the number '4'. To the right of this are sections for 'Account Access' (with a red circle containing '5') and 'Contact Access' (with a red circle containing '8'). Further right are sections for 'Opportunity Access' and 'Case Access'. At the bottom right is a 'Team Role' section with a red circle containing '6'. There are 'Save', 'Save & More', and 'Cancel' buttons at the top right.

Access Level:
Give your team
members Read Only or
Read /Write Access to
the account and the
related contacts.



Creating Account Views

You can also create your own views!

1. Next to the view selector, click the “Clone” button
2. Name the new view - You may want to add something to the title so you know it's your own personal view
3. Choose whether you would like to view all accounts or accounts you own
4. Set the filter
5. Add or remove the fields you would like to see in the view
6. Click the “Save As” button to save your view

The screenshot shows the Salesforce interface for creating a new account view. The top navigation bar has 'Accounts' selected. A red circle labeled '1' is over the 'Clone' button in the top right corner of the main content area. The main content area displays a list of recent accounts and a 'Recent Accounts' table.

Step 1. Enter View Name: A red circle labeled '2' is over the 'View Name' input field, which contains '(JF) Accounts that Accept POS'. Below it, 'Created By' and 'Modified By' information is shown.

Step 2. Specify Filter Criteria: A red circle labeled '3' is over the 'Filter By Owner' section, which includes radio buttons for 'All Accounts' (selected) and 'My Accounts'.

Step 3. Select Fields to Display: A red circle labeled '4' is over the 'Available Fields' list on the left, which includes various account-related fields like 'Account Site', 'Shipping Street', etc. A red circle labeled '5' is over the 'Selected Fields' list on the right, which includes 'Account Name', 'Store ID', etc. Navigation buttons for 'Top', 'Up', 'Down', and 'Bottom' are visible on the right side of the list.

Final Step: A red circle labeled '6' is over the 'Save As' button at the bottom right of the dialog.



Types of Contacts

Contacts are the people you interface with as part of conducting business.

Contacts can be:

- Bartenders
- Buyers
- Chefs
- Clerks
- Hosts/Hostesses
- Managers
- Media/Trade Members
- Other
- Owners
- Sales Reps
- Servers

All Contacts must be tied to an Account



Contact Ownership

Meaning: If you are the owner of a contact, this means you are responsible for maintaining the relationship and updating contact information within Salesforce such as personal/business information. Only contact owners and those the contact has been shared with can edit contact details.

Process to request ownership: If you think you should own a certain contact, follow these steps to request ownership:

1. Contact the Contact Owner of the contact in which you would like ownership
2. Ask that person to change ownership to you, or alternatively share the record with you

Contact
Mrs. Gina Langone

Show Feed Click to add topics

Contact Detail

Name	Mrs. Gina Langone	Edit	Delete	Clone	Sharing
Account Name	BJS WHOLESALE CLUB LIQUOR #133	Contact Owner Danton Crosser [Change]			
Account Type	Off Premise	Work Phone	(413) 593-0131		
Title	Buyer Spirits, Wine	Mobile			
Primary Role	Other	Email	glangone@bjs.com		
Secondary Role		Fax	1234567		
Reports To	View Org Chart	Preferred Method	Email		

Customize Page | Edit Layout | Printable View | Help for this Page ?

Not applicable to Sales Strategy team



Reviewing Contacts

The “Contacts” tab

Contact Detail

Name	Mr. John Doe	Contact Owner	UAT Tester1 [Change]
Account Name	<u>1 HOTEL SOUTH BEACH</u>	Work Phone	4448528966
Account Type	On Premise	Mobile	
Title	Owner	Email	johndoe@test.com
Primary Role	Buyer	Fax	
Secondary Role	Bartender	Preferred Method	Email
Reports To	[View Org Chart]		

Personal Information

Business Objective	Interests & Hobbies
Personal Goals	Languages
Work History	College / Affiliation
Favorite Beam Products	Military Service
Favorite Food or Restaurants	Spouses Name
Work Anniversary	Spouses Interests
Birth Month	Children
Birth Day	Other Information
Birthday	

Social Media

Facebook URL
Instagram Handle
Twitter Handle

Additional Accounts

Additional Accounts

Text to indicate if the contact is tied to more than one account. Format should be Account Name – TDlinx Number

Creating a Contact

There are two ways to create a new account:

From Scratch

- Required to search for the specific account

The screenshot shows the Salesforce Contacts page. The top navigation bar has tabs for Home, Accounts, Contacts, and a New button. Below the navigation is a 'Recent Contacts' section with a table. The table has columns for Name, Account Name, and Title. It lists four contacts: 'test' (Account 1 HOTEL SOUTH BEACH), 'Josephson, Fred' (Account BJS WHOLESALE CLUB LIQUOR #109), 'Doe, John' (Account 1 HOTEL SOUTH BEACH, Title: Owner), and 'Janis' (Account 1 HOTEL SOUTH BEACH). A 'New' button is located at the top right of the contact list.

Name	Account Name	Title
test	1 HOTEL SOUTH BEACH	
Josephson, Fred	BJS WHOLESALE CLUB LIQUOR #109	
Doe, John	1 HOTEL SOUTH BEACH	Owner
Janis	1 HOTEL SOUTH BEACH	

Not applicable to
Sales Strategy team

From an Existing Account

- Account Name defaults per the Account

The screenshot shows the Salesforce Accounts page for account '1 HOTEL SOUTH BEACH'. The top navigation bar has tabs for Home, Accounts, Contacts, and a New Contact button. Below the navigation is a 'Contacts' section with a table. The table has columns for Action, Contact Name, Title, Primary Role, Work Phone, Mobile, and Email. A 'New Contact' button is located at the top right of the contact list.

Action	Contact Name	Title	Primary Role	Work Phone	Mobile	Email
--------	--------------	-------	--------------	------------	--------	-------

This is the recommended approach

Creating Contacts (continued)

To create a Contact, follow these best practice steps:

1. Find the *account* that the contact is associated with
2. Hover over Contacts hyperlink or navigate to the Contacts list
3. Click the “New Contact” button

Account
1 HOTEL SOUTH BEACH

Show Feed
« Back to List: Accounts

Contacts (1) 2

New Contact

Action	Contact Name	Title	Mobile	Email	Fax	Preferred Method	Reports To
Edit	John Doe	Owner	4448528966	johndoe@test.com		Email	
value Segmentation Tier	Gold						
Trade Channel	Luxury Accounts						
Sub Channel	Full Service Lodging						
Corporate Account	Florida						

Customize Page | Printable View | Help for this Page ?

If you hover your mouse over “Contacts” the related list appears

Cocktail Menu ⓘ Well ⓘ
Spirits Listing ⓘ Account Style
Bottle Service ⓘ Account Positioning
I-Hub

▼ Social Media

Facebook URL
Instagram Handle
Twitter Handle

Contacts (3) New Contact

Action Contact Name Title Mobile Email Fax Preferred Method Reports To

Edit John Doe Owner 4448528966 johndoe@test.com Email

Contacts Help ?

Alternatively navigate to the Contacts list at the bottom of the Account page

Creating Contacts (continued)

4. Enter the Contact's information. At a minimum, the Last Name and Account Name need to be entered (required fields)
5. Click the “Save” button or the “Save & New” button to create an additional contact for the same account.

Contact Edit
New Contact

Help for this Page ?

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

Contact Edit

5

Contact Information | = Required Information

First Name	--None--	<input type="text"/>	Contact Owner	UAT Tester1
Last Name	<input type="text"/>		Work Phone	<input type="text"/>
Account Name	1 HOTEL SOUTH BEACH 		Mobile	<input type="text"/>
Title	<input type="text"/>		Email	<input type="text"/>
Primary Role	--None--		Fax	<input type="text"/>
Secondary Role	--None--		Preferred Method	--None--
Reports To	<input type="text"/> 			

Personal Information

Business Objective	<input type="text"/>	Interests & Hobbies	<input type="text"/>
Personal Goals	<input type="text"/>	Languages	<input type="text"/>
Work History	<input type="text"/>	College / Affiliation	<input type="text"/>
Favorite Beam Products	<input type="text"/>	Military Service	--None--
Favorite Food or Restaurants	<input type="text"/>	Spouses Name	<input type="text"/>
Work Anniversary	[8/27/2015]	Spouses Interests	<input type="text"/>
Birth Month	--None--	Children 	<input type="text"/>

By creating a contact from an Account, the account name is automatically entered



Creating Contacts from Scratch

To create a Contact, follow these best practice steps:

1. Click the “Contact” tab.
2. Click the “New” button.
3. Enter the Contact’s information. At a minimum, the Last Name and Account Name need to be entered (required fields). Click the magnifying glass next to Account to search for your account.
4. Click the “Save” button or the “Save & New” button to create an additional contact for the same account.

The screenshot shows the Salesforce Contacts page. At the top, the 'Contacts' tab is highlighted with a red circle labeled '1'. Below it, there's a 'Recent Contacts' section with columns for 'Name', 'Account Name', 'Title', and 'Primary Role'. A blue 'New' button is located in the top right corner of this section, with a red circle labeled '2' over it.

The screenshot shows the 'Contact Edit' form. At the top right, there are 'Save', 'Save & New', and 'Cancel' buttons, with a red circle labeled '4' over the 'Save & New' button. The 'Contact Information' section contains fields for First Name, Last Name, Account Name (with a magnifying glass icon), Title, Primary Role, Secondary Role, and Reports To. A red circle labeled '3' points to the magnifying glass icon next to the 'Account Name' field. To the right, there are sections for 'Contact Owner', 'Work Phone', 'Mobile', and 'Email'. Below the main form, a 'Lookup' window is open, showing a list of recently viewed accounts. A blue callout bubble points to the 'Search' input field in the lookup window with the text: 'You can search by TDLinx or by the name of the account'. Another blue callout bubble points to the list of accounts with the text: 'Select the result you want to use'.

Account Name	Store ID	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code	Billing Country
1 HOTEL SOUTH BEACH	TDL7390446	2341 LINCOLNS AVE	MIAMI BEACH	FL	33139	United States
1001 LIQUORS123	TDL1472554	1400A E ORANGE LAKE BLVD	KISSIMMEE	Florida	34747	United States
1003 LIQUORS	TDL659130	833 CYPRESS PKWY	KISIMMEE	Florida	34759	United States
1006 LIQUORS	TDL3860947	16965 US HIGHWAY 441	MOUNT DORA	Florida	32757	United States
101 CANTINA	TDL273212	705 S WOODWARD AVE STE 102	TALLAHASSEE	Florida	32304	United States
101 LIQUOR & WINE	TDL3689542	617 E OAKLAND PARK BLVD	FORT LAUDERDALE	Florida	33334	United States



Editing Contacts

Just as for Accounts, there are two ways to edit a record:

- Click the “Edit” button, edit the appropriate fields in the Edit page, and save
- Double click the field you would like to edit, make the change, and save the updates

A

Contact Detail

Name	Mr. John Doe
Account Name	1 HOTEL SOUTH BEACH
Account Type	On Premise
Title	Owner
Primary Role	Buyer
Secondary Role	Bartender
Reports To	[View Org Chart]

Contact Edit

Contact Information

First Name	Mr. John
Last Name	Doe
Account Name	1 HOTEL SOUTH BEACH
Title	Owner
Primary Role	Buyer
Secondary Role	Bartender
Reports To	

Contact Owner: UAT Tester1
Work Phone: 4448528966
Mobile: 4448528966
Email: johndoe@test.com
Fax:
Preferred Method: Email

B

You must click the “Save” button, otherwise your changes will be lost!

Contact Detail

Name	Mr. John Doe
Account Name	1 HOTEL SOUTH BEACH
Account Type	On Premise
Title	Owner
Primary Role	Buyer
Secondary Role	Bartender
Reports To	[View Org Chart]

Contact Owner: UAT Tester1 [Change]
Mobile: 4448528966
Email: johndoe@test.com
Fax:
Preferred Method: Email

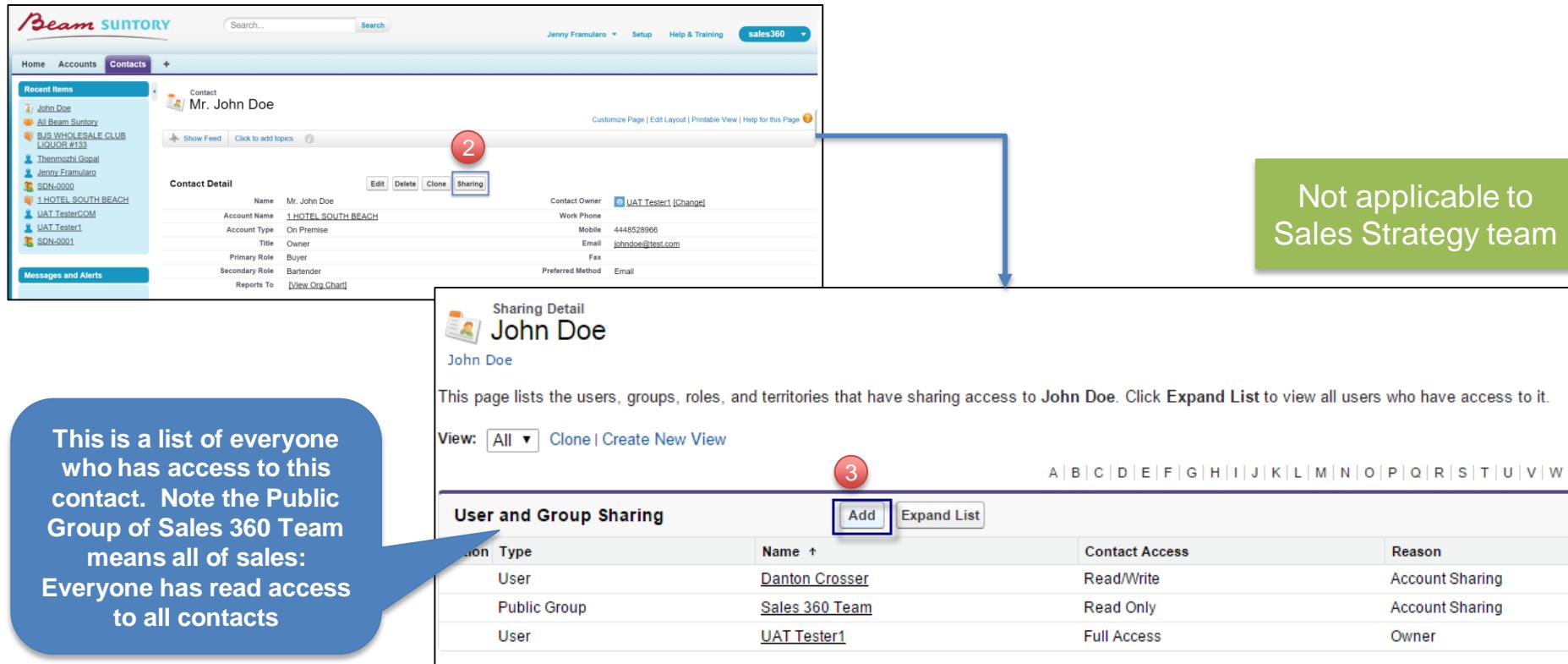
Your change will be a different color until you save your changes

Not applicable to Sales Strategy team

Sharing Contacts

If you would like to share your contact with another person, follow these steps:

1. Navigate to the contact that you own and that you would like to share.
2. Click the “Sharing” button
3. Click the “Add” button



The screenshot illustrates the sharing process for a contact named Mr. John Doe. The top half shows the contact detail page with the "Sharing" button highlighted (step 2). A blue arrow points down to the "Sharing Detail" page for John Doe, which lists the users, groups, roles, and territories that have sharing access to him. The "Add" button on this page is also highlighted (step 3). A green callout box on the right states: "Not applicable to Sales Strategy team". A blue speech bubble on the left provides context: "This is a list of everyone who has access to this contact. Note the Public Group of Sales 360 Team means all of sales: Everyone has read access to all contacts".

Sharing Detail
John Doe

This page lists the users, groups, roles, and territories that have sharing access to John Doe. Click **Expand List** to view all users who have access to it.

User and Group Sharing

Action	Type	Name	Contact Access	Reason
Add	User	Danton Crosser	ReadWrite	Account Sharing
	Public Group	Sales 360 Team	Read Only	Account Sharing
	User	UAT Tester1	Full Access	Owner



Sharing Contacts (continued)

4. Change the Search dropdown to Users
5. Find the user you would like to share with, then click the “Add” button to make sure their name appears within the Share With column
6. Change the Contact Access to Read/Write
7. Click the “Save” button

John Doe
New Sharing

Contact: Specify the sharing for this record. You can share this record and its related data with individual users in a particular role plus all of the users in roles below that role.

Individual sharing can only be used to grant wider access to data, not to restrict access.

New Sharing Save Cancel

Sharing Information

Search: for: Find

Your search returned more than 100 rows. Only the first 100 are displayed.

Available	Share With
User: Mingchi Hu	User: Nadia Wilson
User: Mohit Bobade	
User: Morgann Cook	
User: Nabil Wanna	
User: Neil Shah	
User: Nicole Aritzmendi	
User: Rachel Frandrup	
User: Rachel Harris	
User: Rajarshi Bagchi	
User: Renee Ryan	
User: Rob Nelson	
User: Roger Smith	
User: Saheb Samanta	
User: Sarah Cordova	

Add Remove

Contact Access ▼

4 5 6 7 Save Cancel



Associating Contacts to Multiple Accounts

For now,
additional
accounts are
indicated via text.

More robust
solution coming
this fall.

Not applicable to
Sales Strategy team

For now

Contact Detail

Name Alan Jacobs

Account Name **BJS WHOLESALE CLUB LIQUOR #109**

Account Type Off Premise

Title

Primary Role

Secondary Role

Reports To [\[View Org Chart\]](#)

Contact Owner UAT Tester1 [Change]

Work Phone

Mobile

Email

Fax

Preferred Method

▼ Personal Information

Business Objective

Personal Goals

Work History

Favorite Beam Products

Favorite Food or Restaurants

Work Anniversary

Birth Month

Birth Day

Birthday

Interests & Hobbies

Languages

College / Affiliation

Military Service

Spouses Name

Spouses Interests

Children

Other Information

▼ Social Media

Facebook URL

Instagram Handle

Twitter Handle

▼ Additional Accounts

Additional Accounts Planet Hollywood - TDL5161003

Edit Clone Sharing

Resources & Troubleshooting

Self-Help & Reference Material

- Review Videos & Training materials stored:
 - Salesforce Reference Material
 - Edge website
 - BeamTube



Beam Suntory Help Desk

- Contact Beam Suntory Help Desk for **access and login support**
 - Call 1-800-522-8944
 - Email: ServiceDesk@beamsuntory.com



sales360@beamsuntory.com

- Suggestions or feedback on what you see
- Additional support





Self-Help Pages

Beam SUNTORY

Search...

UAT Tester1 ▾ Setup Help & Training

Home Accounts Contacts +

Recent Items

- [UAT Tester1](#)
- [Fred Josephson](#)
- [DC Smith](#)
- [BJS WHOLESALE CLUB LIQUOR #109](#)
- [Jane Doe](#)
- [TH HARRIS P](#)
- [AN Smith](#)
- [1003 LIQUORS](#)
- [1001 LIQUORS123](#)

Messages and Alerts

Scheduled Maintenance Notification

Sunday May 17th, 2015 2:00 a.m.
through 2:25 a.m. CDT

Salesforce will not be available
during this time. Please plan your
work accordingly for this
weekend.

Reference Materials

1 Brand and Brand Quality Combinations

1 Reference Materials

UAT Tester1
Tuesday August 18, 2015

[Hide Feed](#)

Post File New Event More ▾

What are you working on?

Sort By Most Recent Activity ▾

There are no updates.

Recommendations More

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Jenny Framularo
Joined in the last month [+ Follow](#)

UAT Tester2
Joined in the last month [+ Follow](#)

Danton Crosser
Shares interest in 23 records [+ Follow](#)

Thenmozhi Gopal
Joined in the last month [+ Follow](#)

