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 Salesfore.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

Next

- 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 serval 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

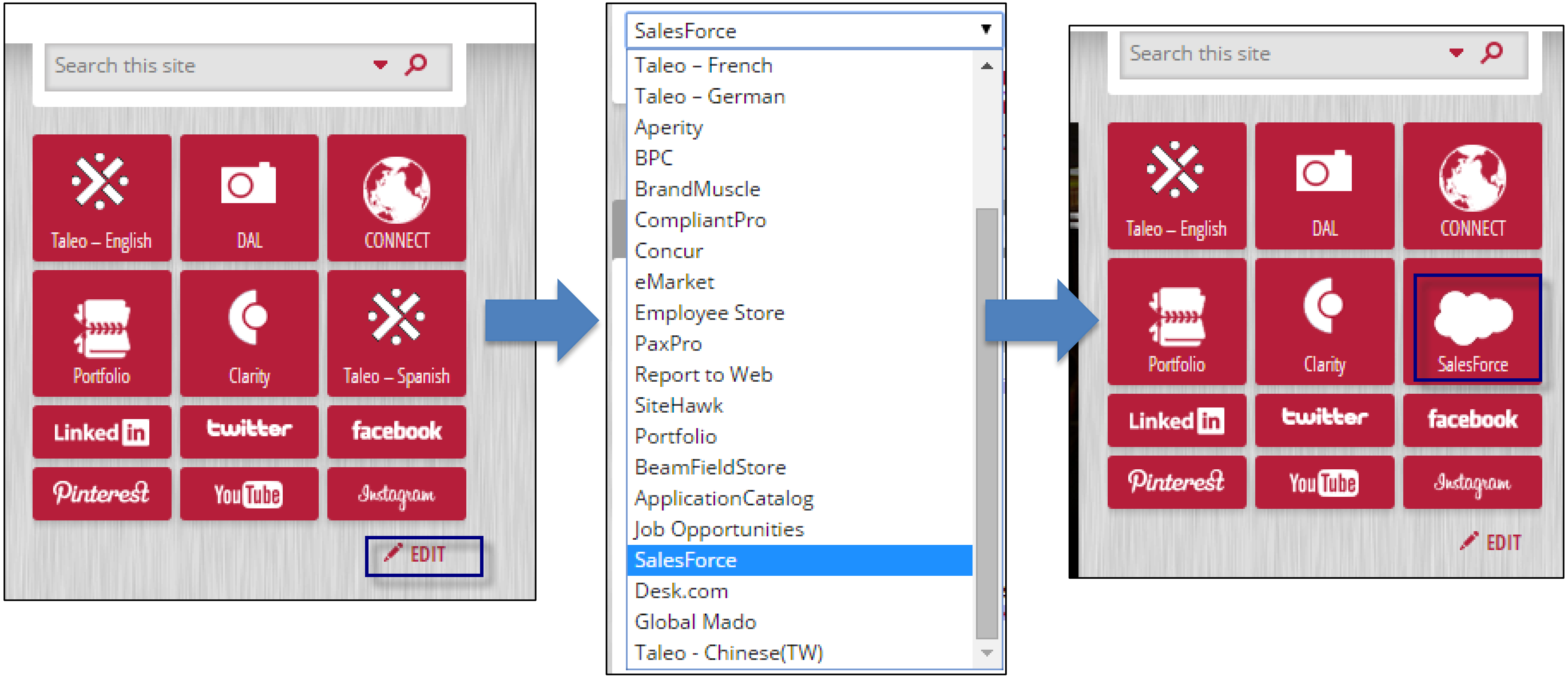
- Q: How do I associate a contact to more than one account?
- A: Please review this slide for instructions

FAQ - Support

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

Logging in to Salesforce: Single Sign On

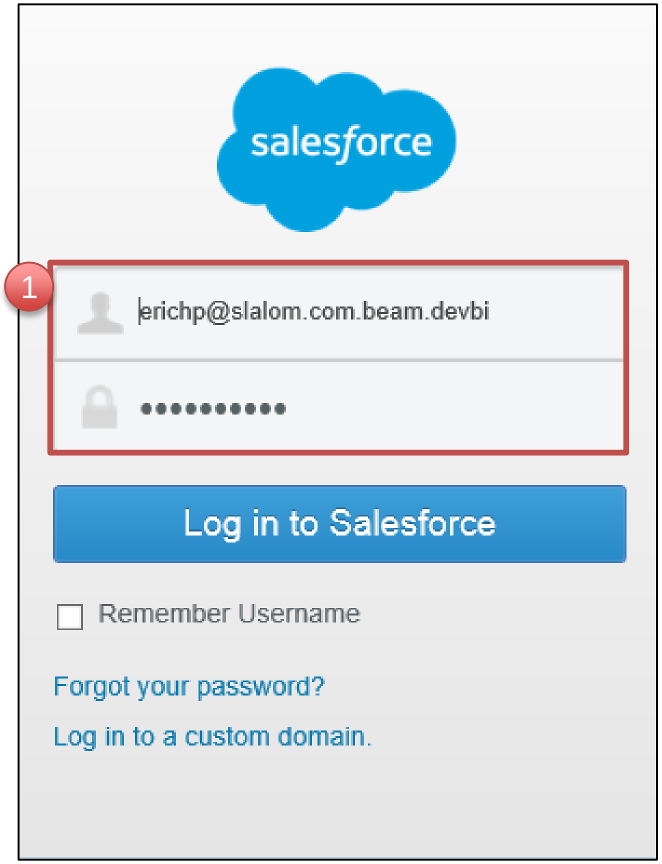
Navigate to the Stir homepage and add the Salesforce Module:

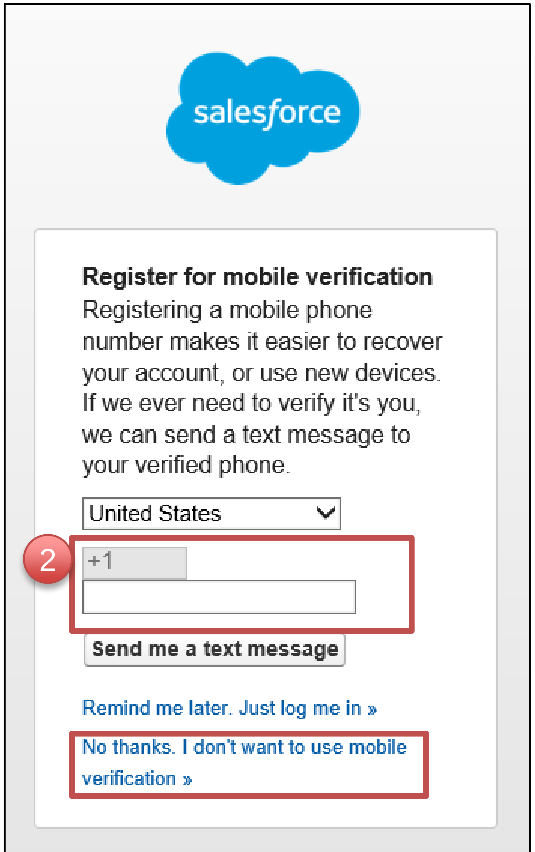


Once you click on the Salesforce module, you will be redirected and logged into Salesforce.com via Single Sign On functionality

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

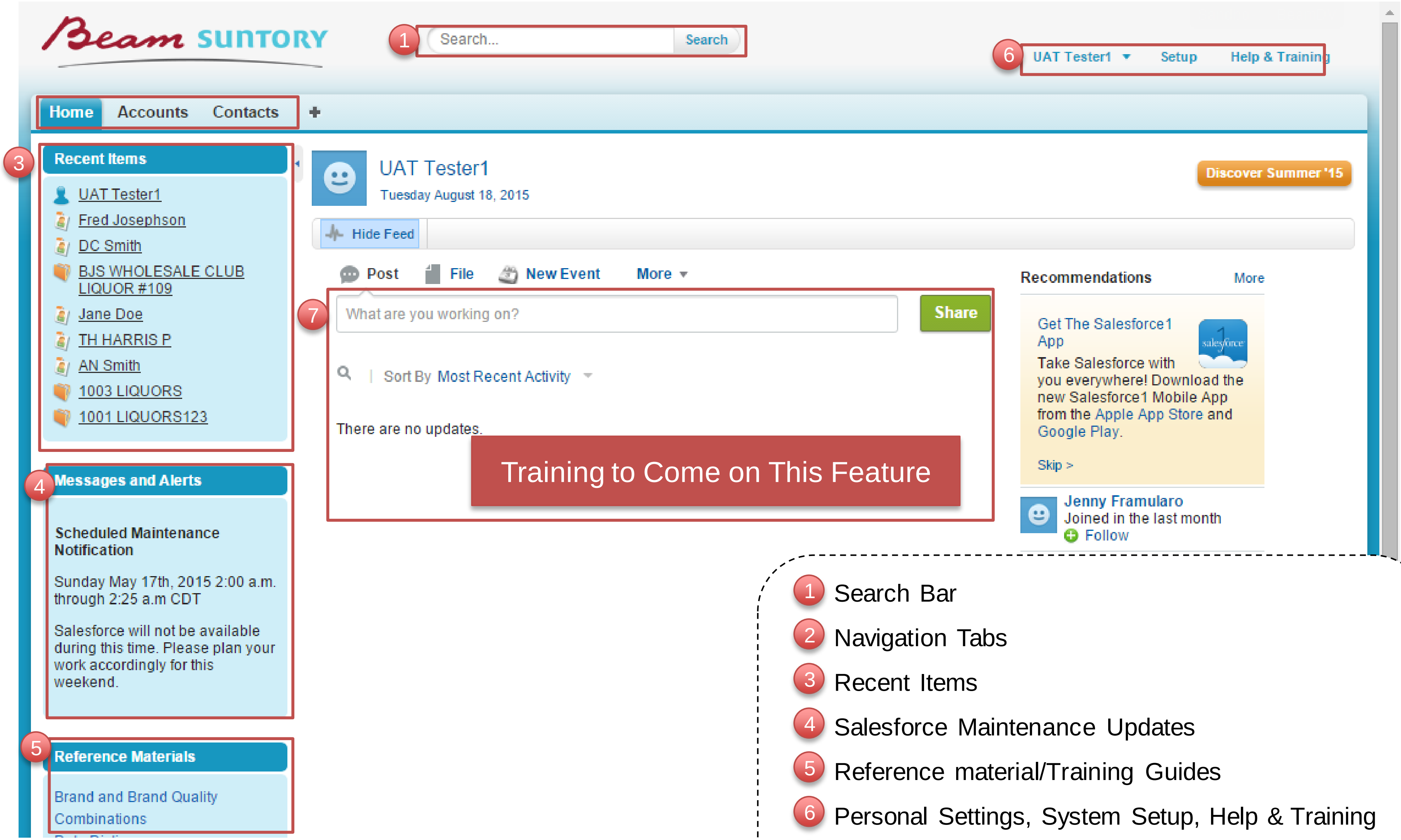




1 Login Prompt

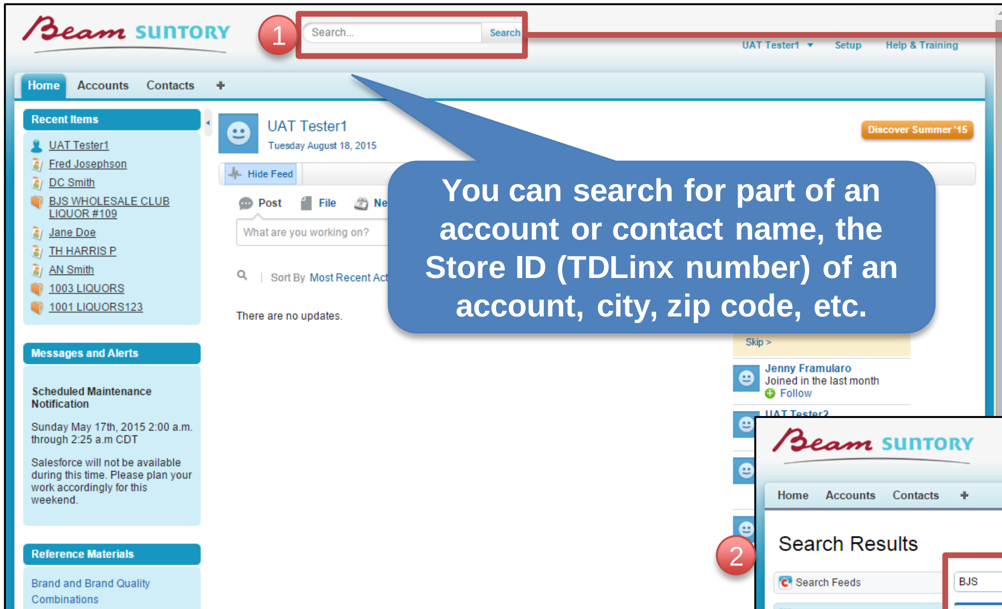
2 Optional: Mobile Registration

Navigation

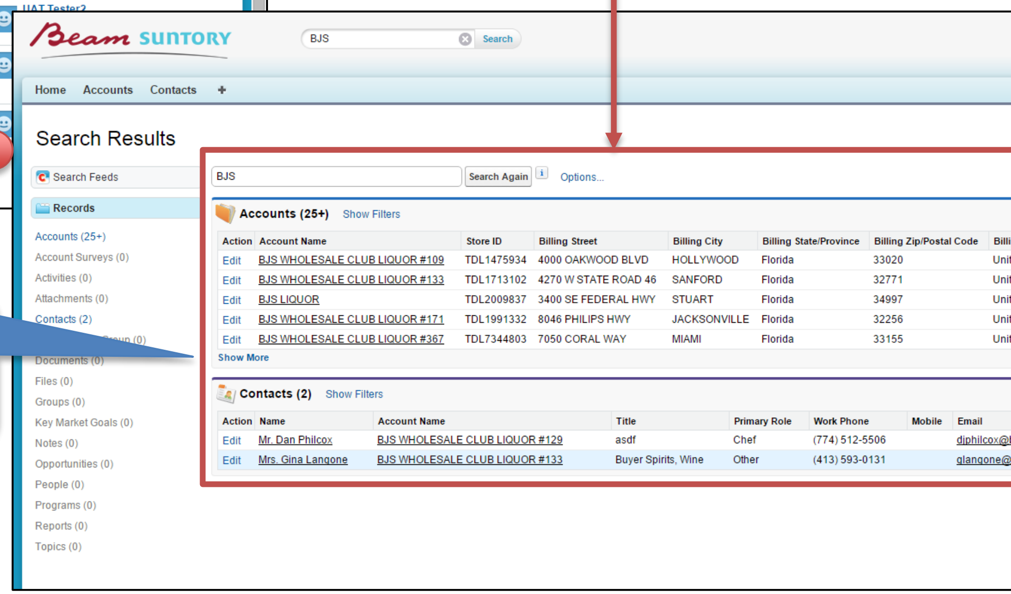


1. Search Bar
2. Navigation Tabs
3. Recent Items
4. Salesforce Maintenance Updates
5. Reference material/Training Guides
6. Personal Settings, System Setup, Help & Training
7. Collaboration and updates made within the system

Searching for a Contact or Account



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

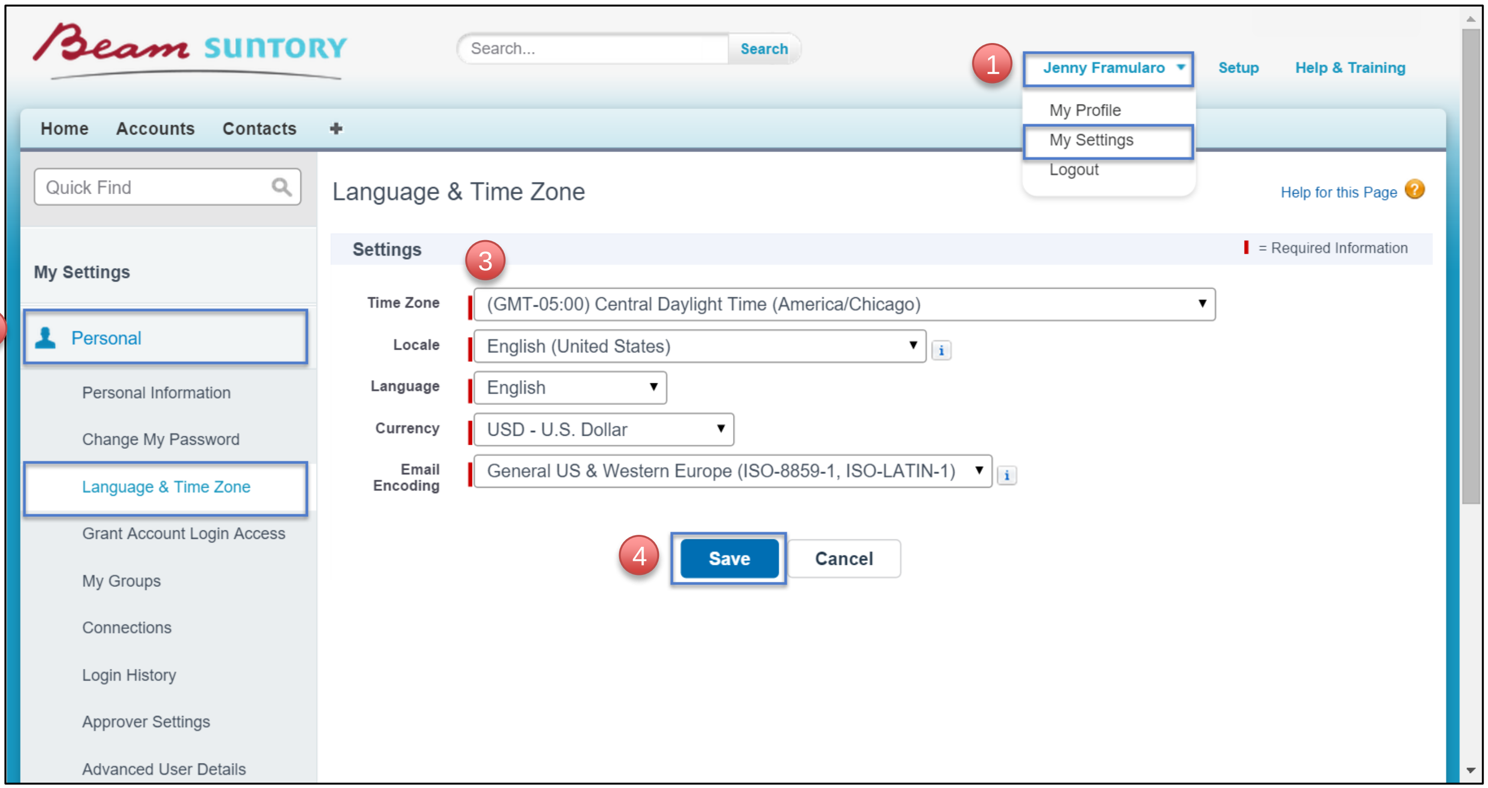
1 Search Bar

2 Sample Search Results by Category

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



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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 is the project customizing the salesforce.com platform for Beam

	Contains	Integration With	Usage
salesforce	• 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	• SAP • Aperity	• 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
Aperity	• All sales and retail data (from distributor depletion to retailer) • Brand's depletions from wholesaler to retailers within US	• GoSpot Check • Salesforce	• Evaluate channel, performance • Distribution KPI's on our strategic brands
GO SPOTCHECK	• Survey collection that allows Beam Suntory to track performance against certain programs/incentives • Surveys for the field to complete	• Aperity	• Capture data for various incentives, pricing, and merchandising activity • Record a completion of a survey

*Blue text indicates functionality available later this year

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

Next

Account Integration with Aperity

Aperity → salesforce

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

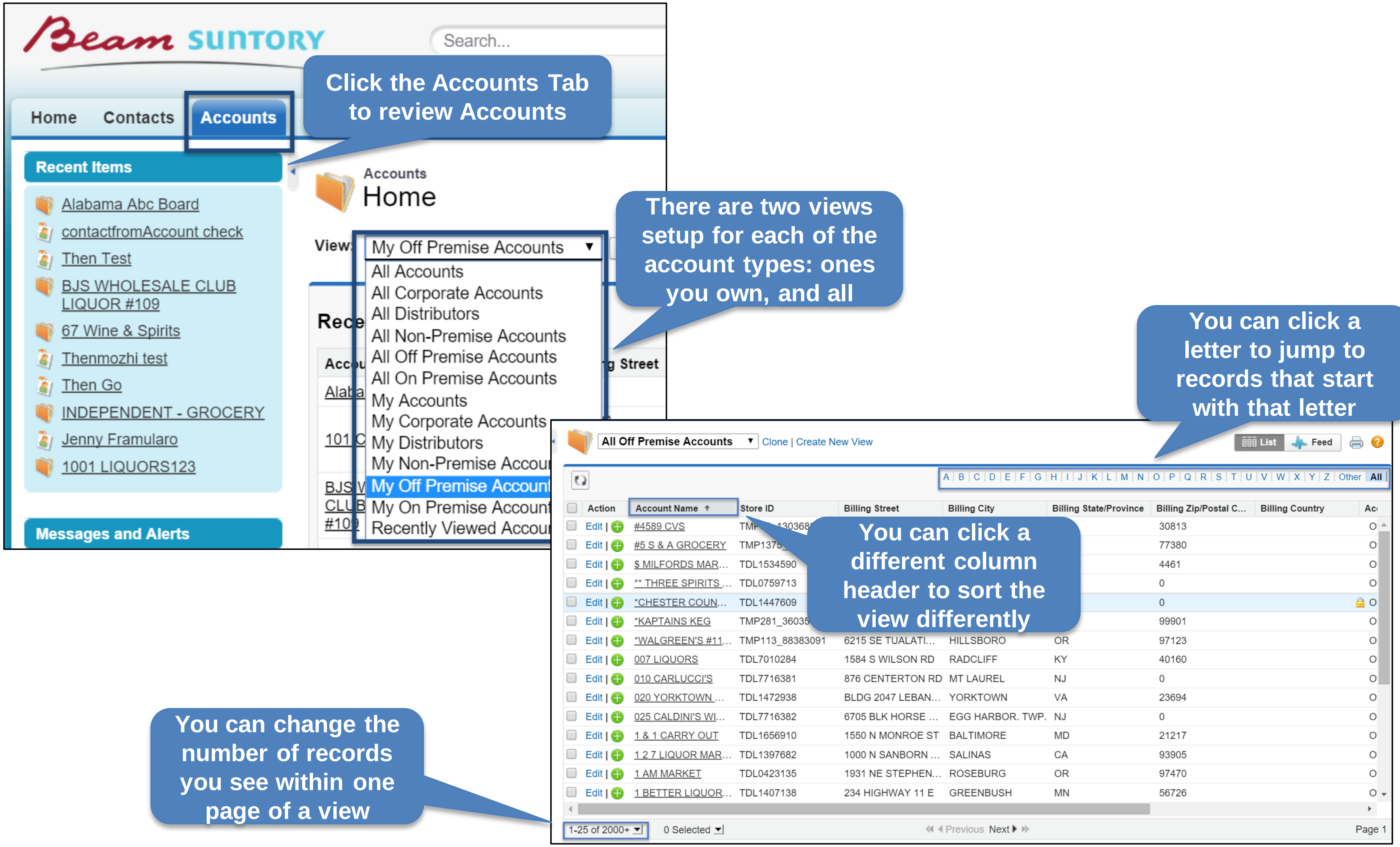
New On Premise, Off Premise, and Distributor Accounts will be migrated from Aperity via the weekly Aperity integration.

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

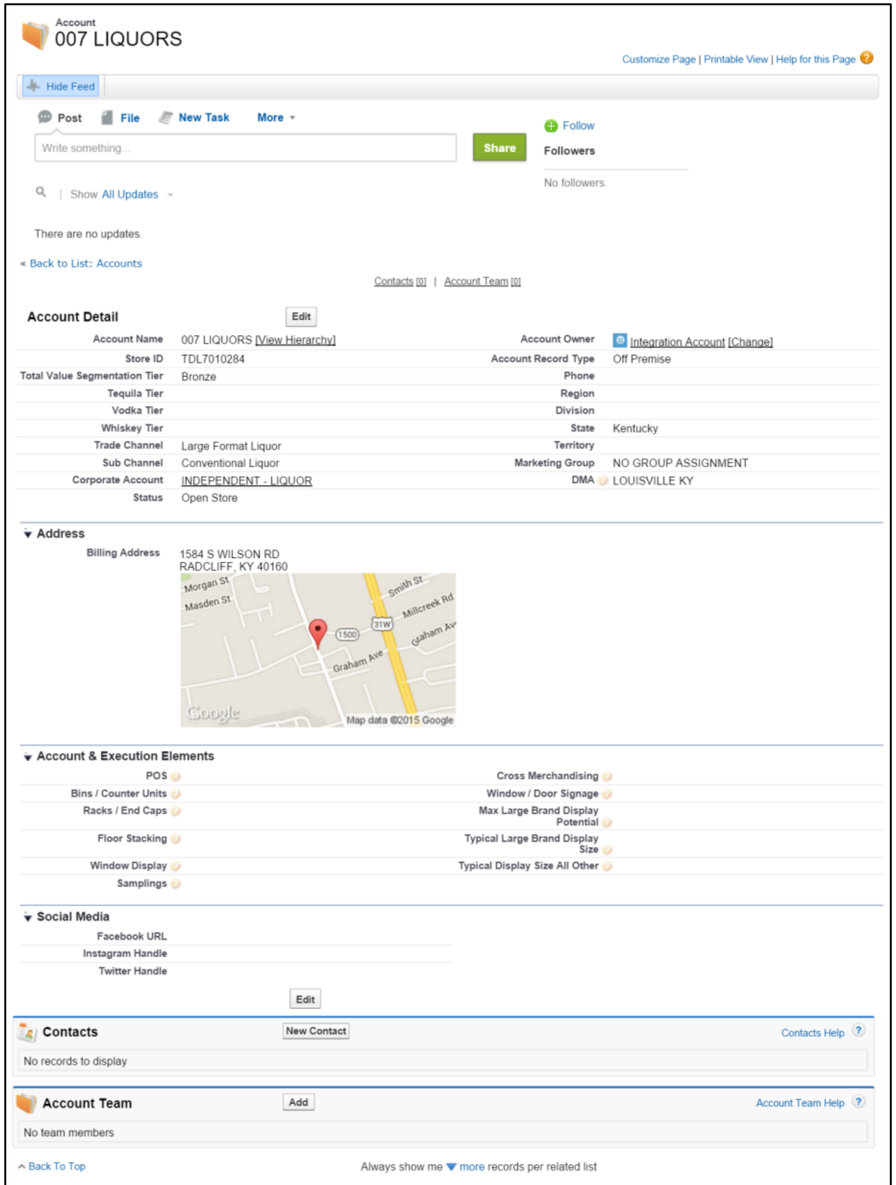
Not applicable to Sales Strategy team

Reviewing Accounts Views



Reviewing Accounts

Next



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Powered by Salesforce.com

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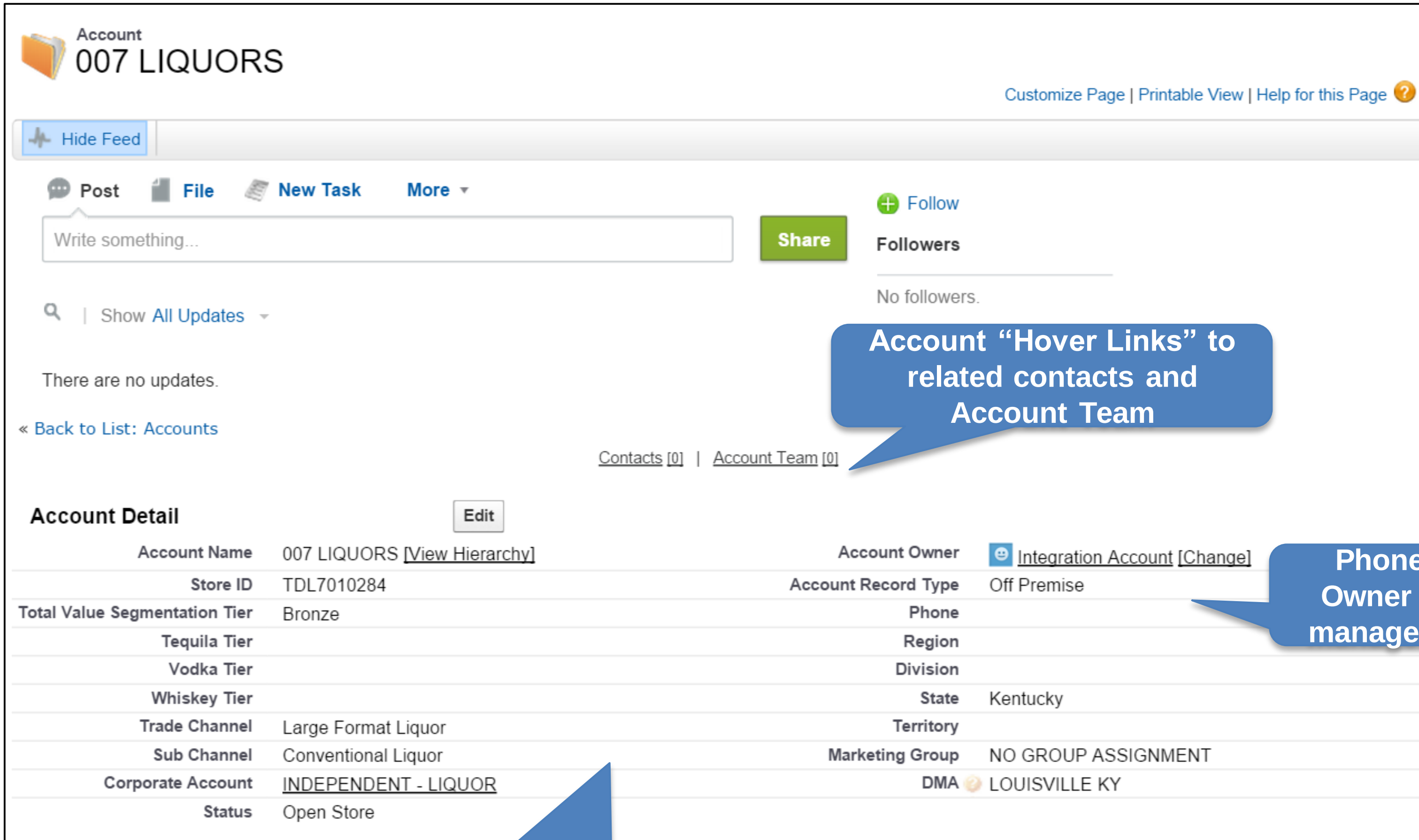
Reviewing Accounts (continued)

Next



Account "Hover Links" to related contacts and Account Team

Phone number and Owner information is managed in Salesforce

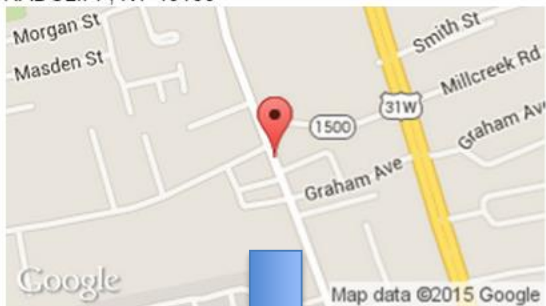
Account data sourced from Aperity

Reviewing Accounts (continued)

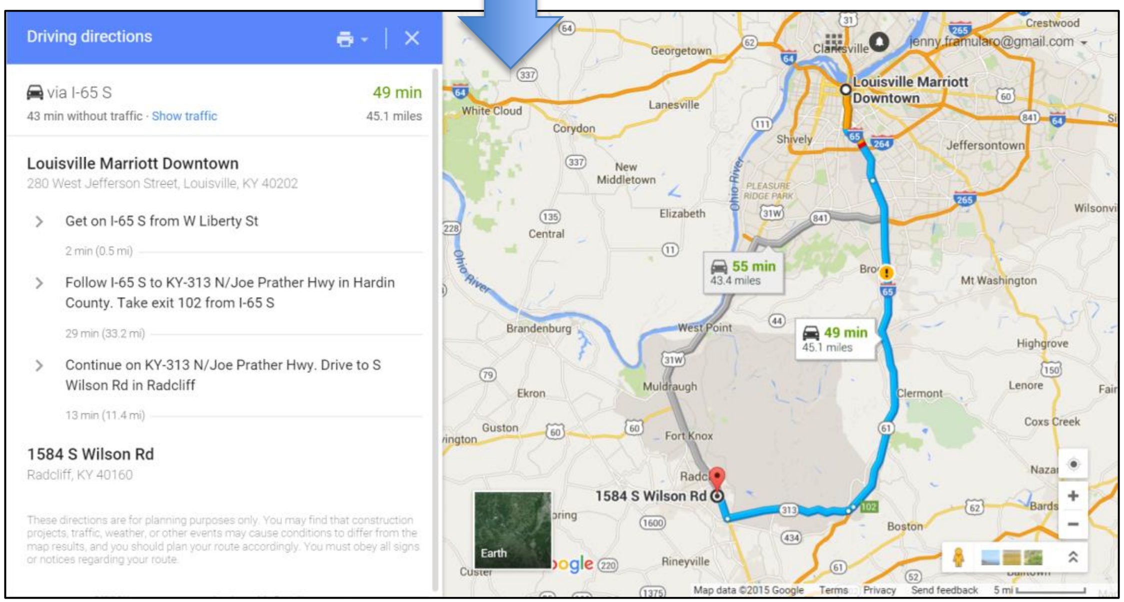
Next

Address

Billing Address 1584 S WILSON RD
RADCLIFF, KY 40160



Address information linked to Google Maps



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Reviewing Accounts (continued)

Editing Accounts

There are two ways to edit a record:

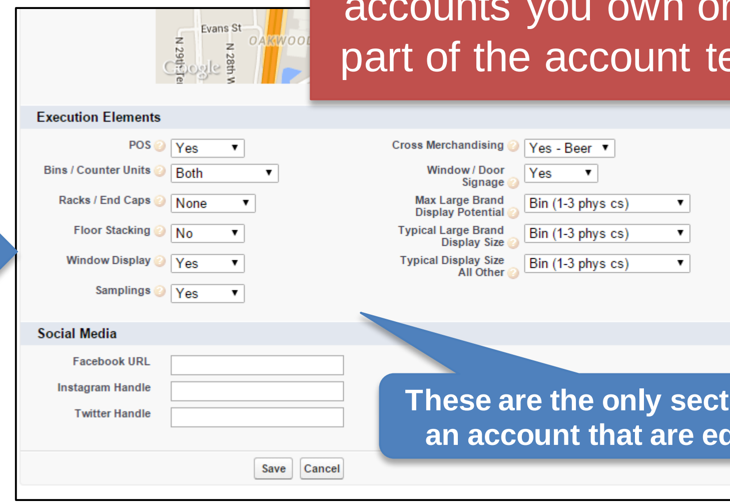
A. Click the “Edit” button, edit the appropriate fields in the Edit page, and save

B. Double click the field you would like to edit, make the change, and save the updates

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

A

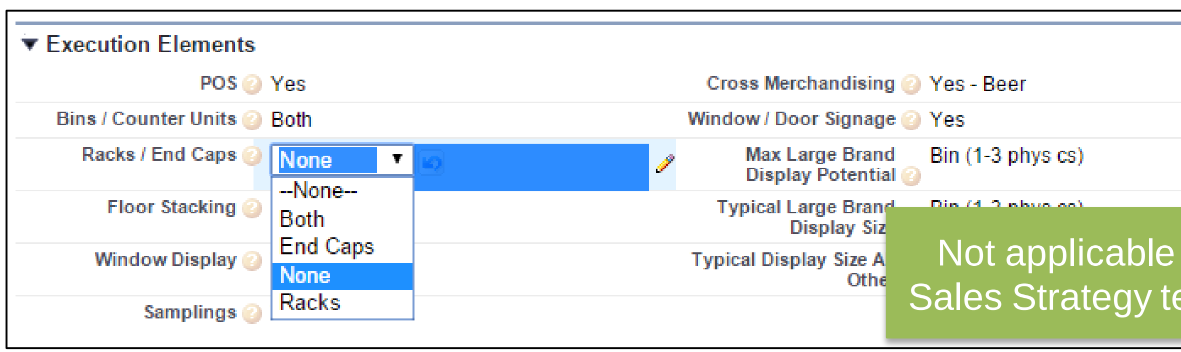
Click the “Edit” button to open the Edit page



These are the only sections on an account that are editable

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

B



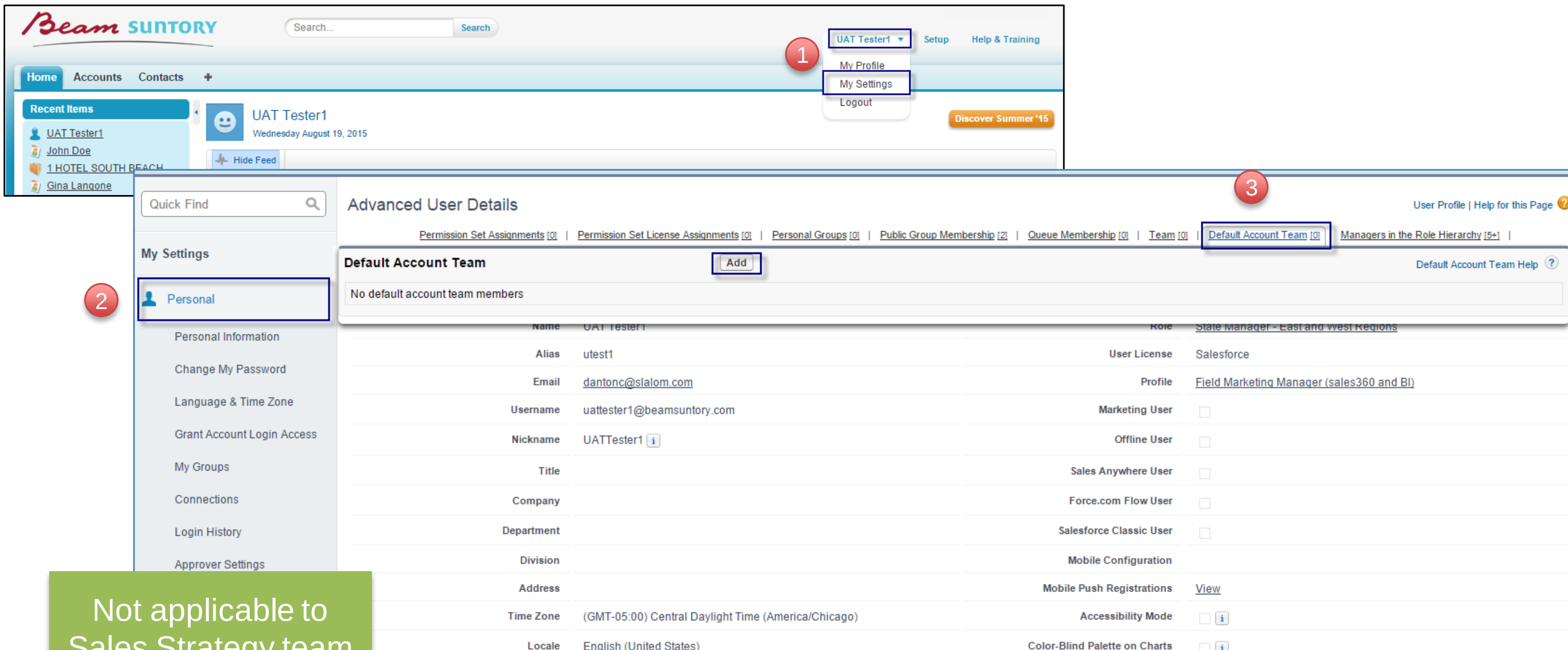
Not applicable to Sales Strategy team

Default Account Teams

Next

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

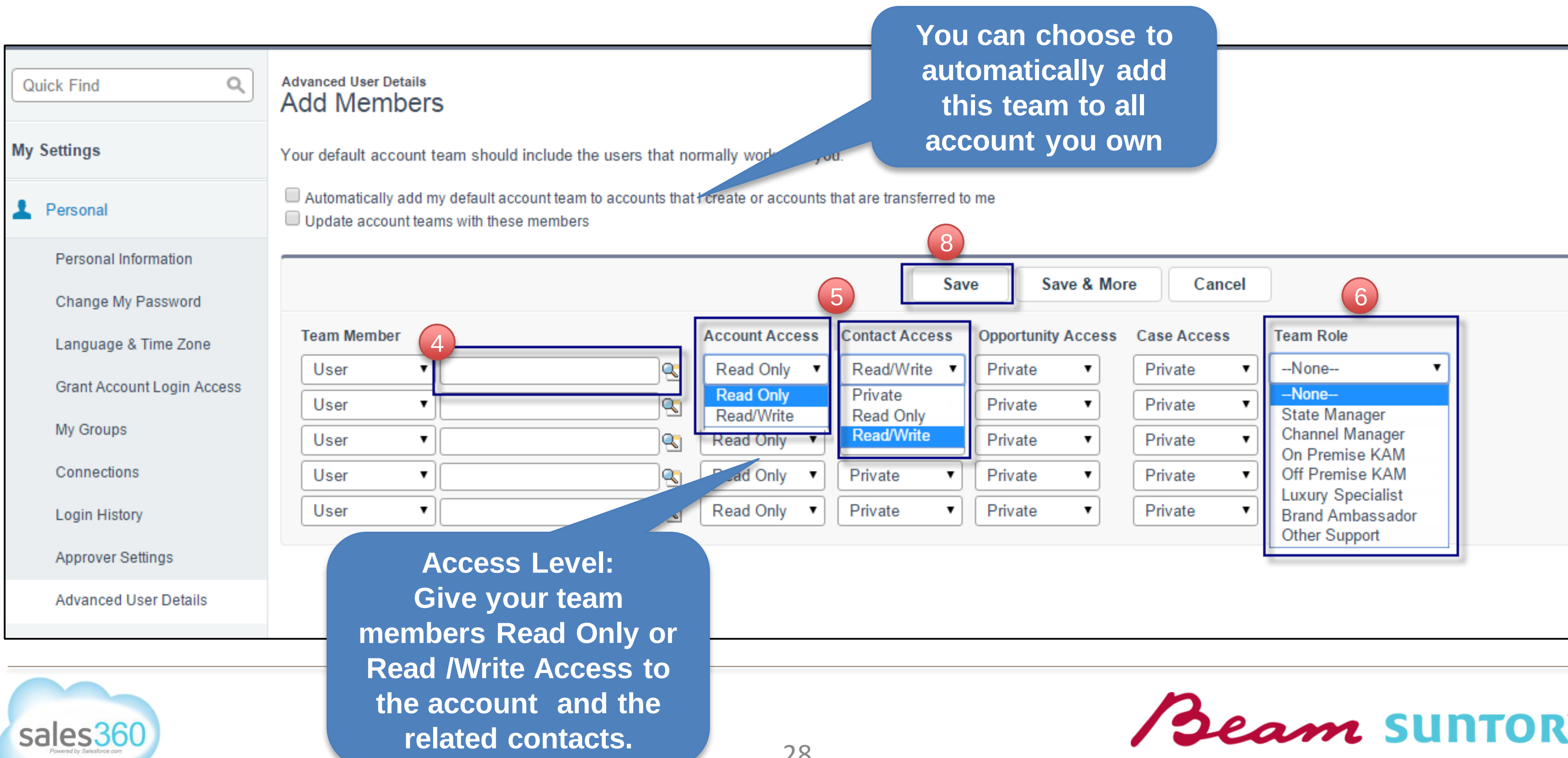


Not applicable to Sales Strategy team

Default Account Teams (continued)

Set up your default Account Team via your personal settings:

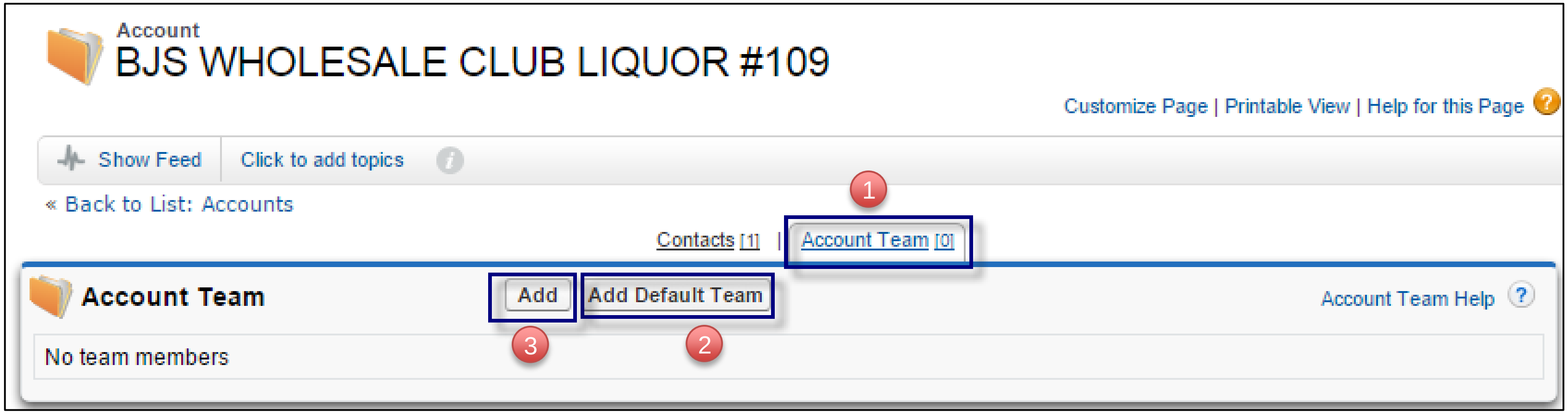
4. Search for another user you want to give access to your accounts to
5. Set the Account & Contact access
6. Set the Team Role
7. Repeat for each row
8. Click the “Save” button when you are done



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

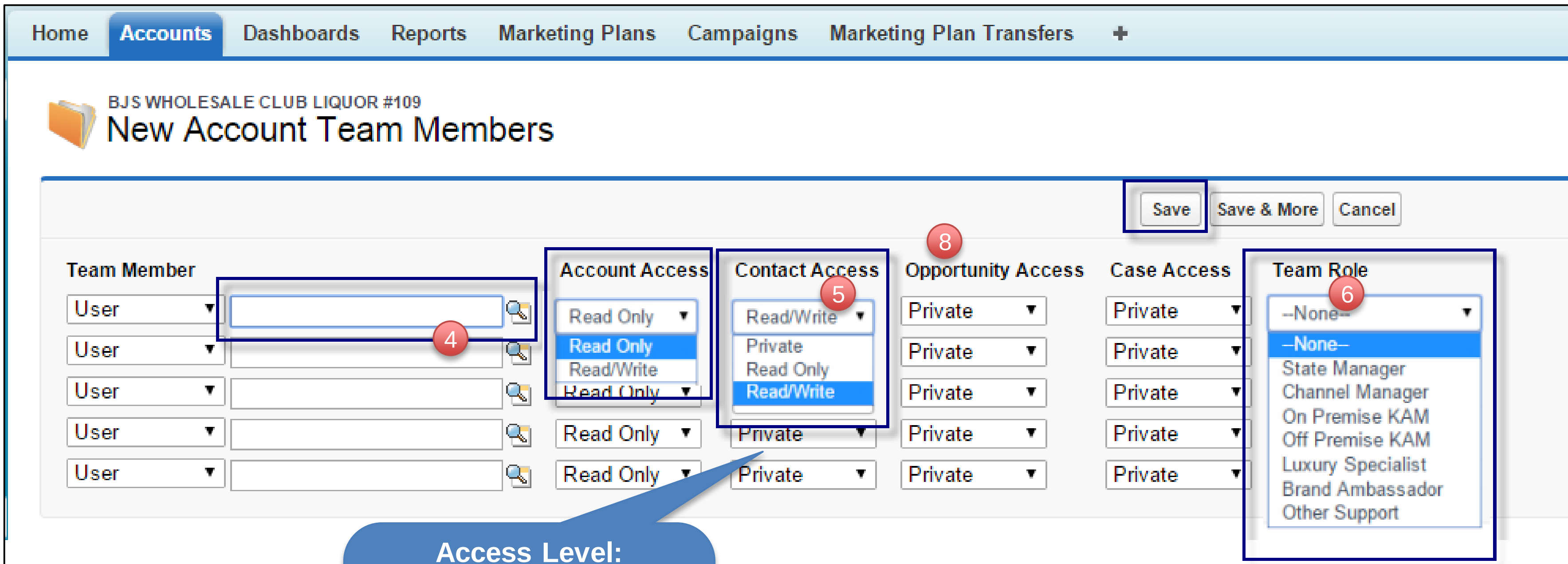


Not applicable to Sales Strategy team

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

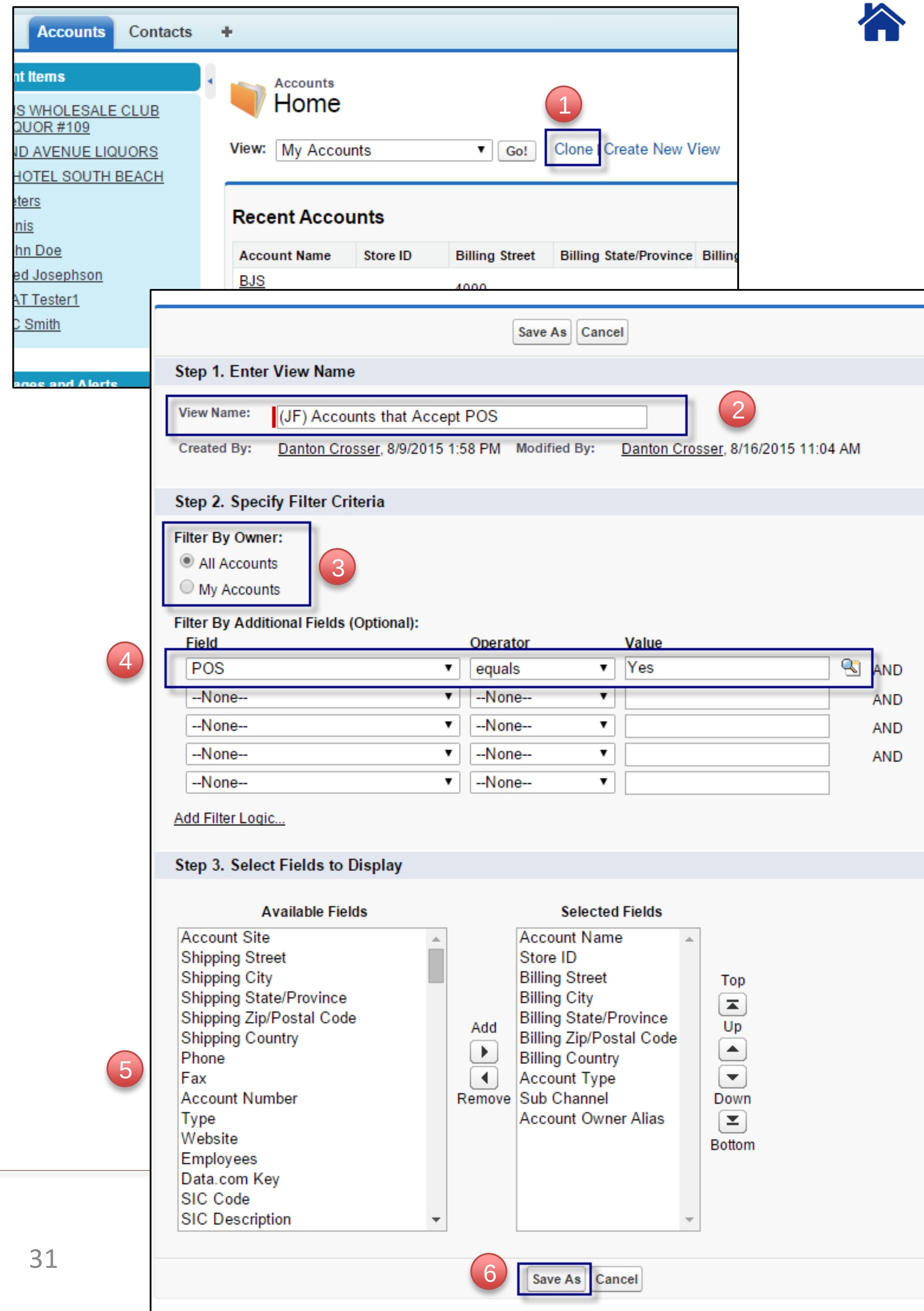


Access Level: Give your team members Read Only or Read /Write Access to the account and the related contacts.

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



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

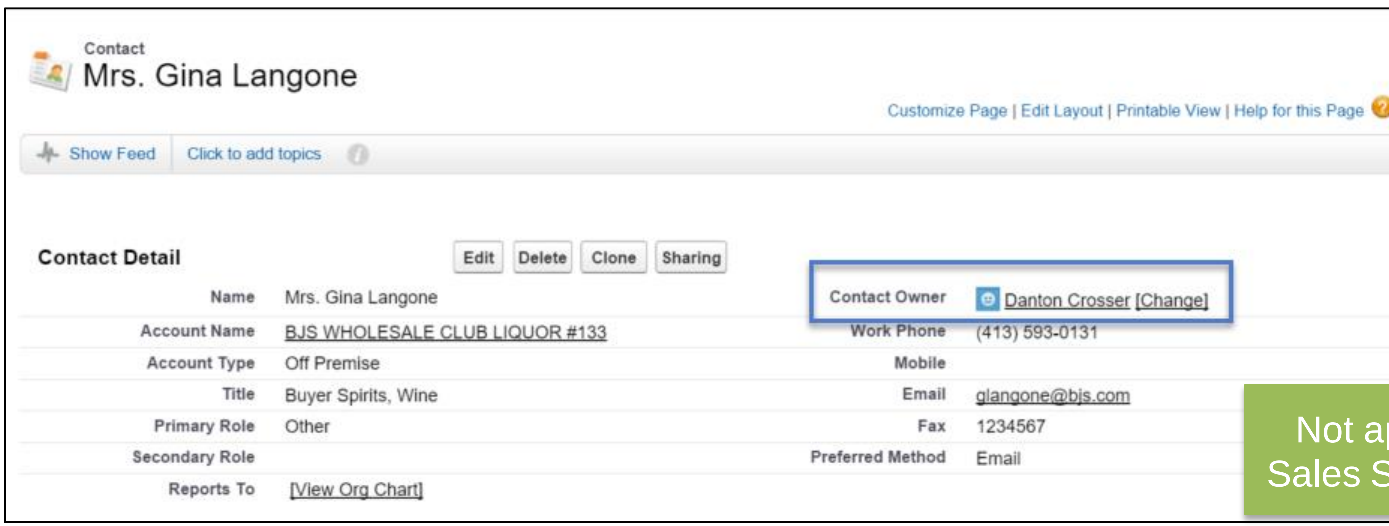
All Contacts must be tied to an Account

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.

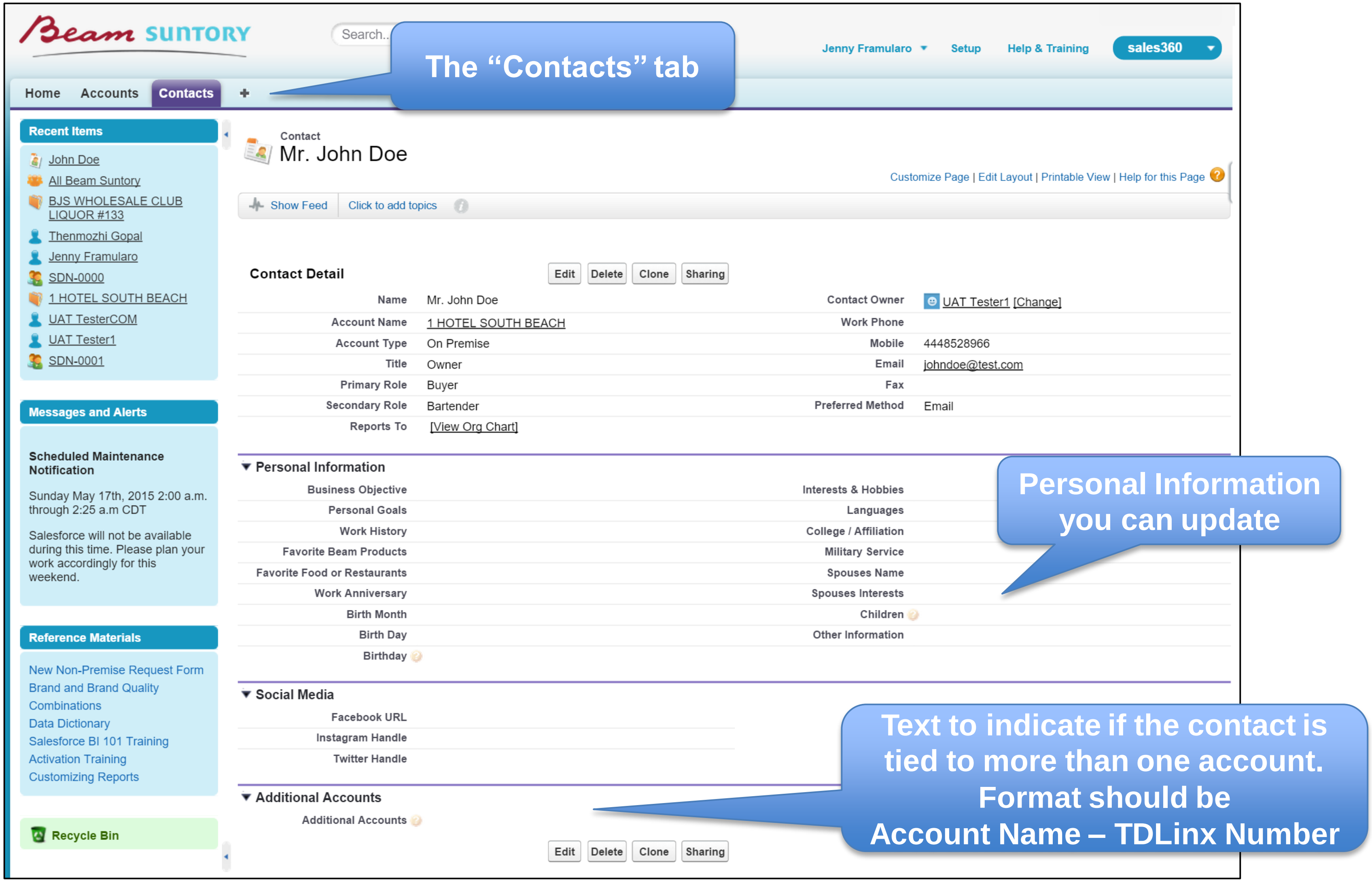
Process to request ownership: If you think you should own a certain contact, follow these steps to request ownership:

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



Not applicable to Sales Strategy team

Reviewing Contacts

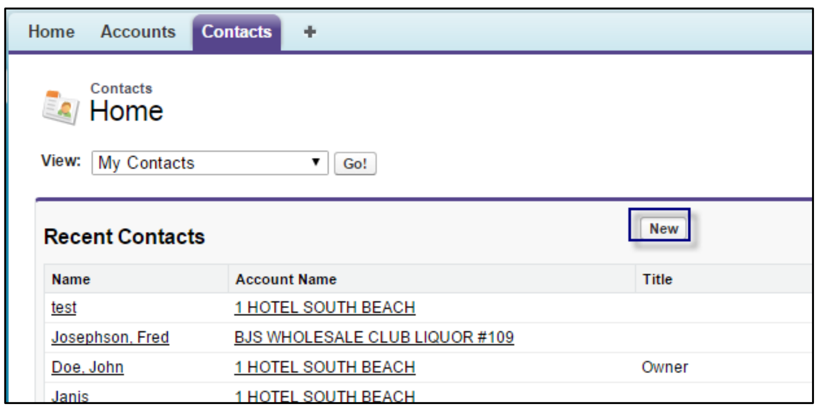


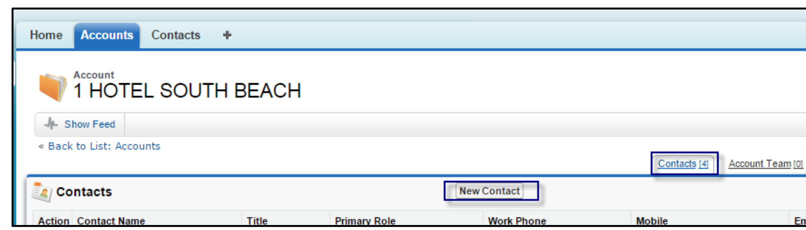
Creating a Contact

Next

There are two ways to create a new account:

From Scratch	From an Existing Account
• Required to search for the specific account	• Account Name defaults per the Account





Not applicable to Sales Strategy team

This is the recommended approach

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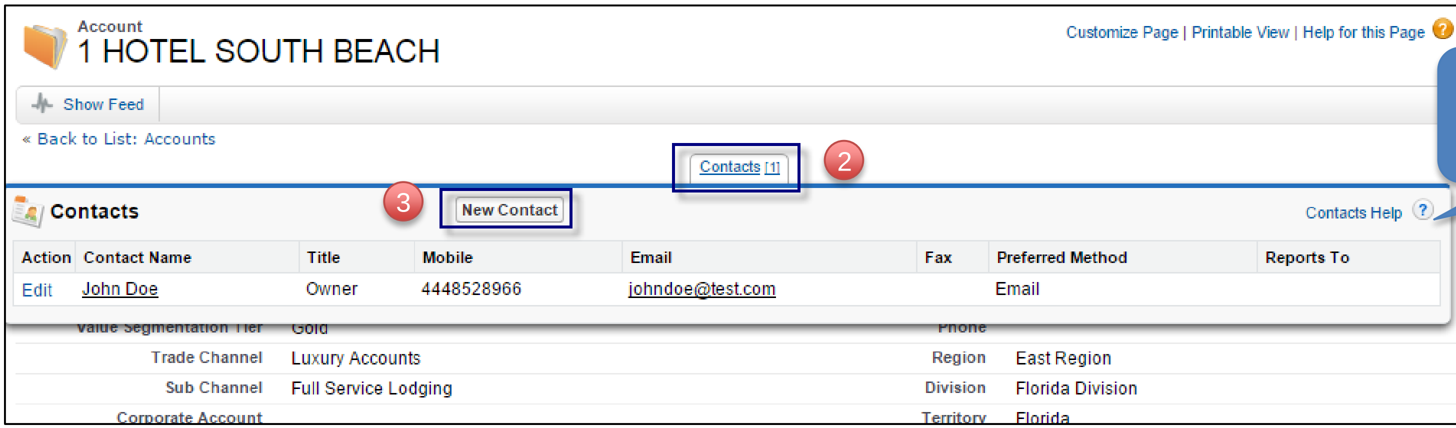
Creating Contacts (continued)

Next

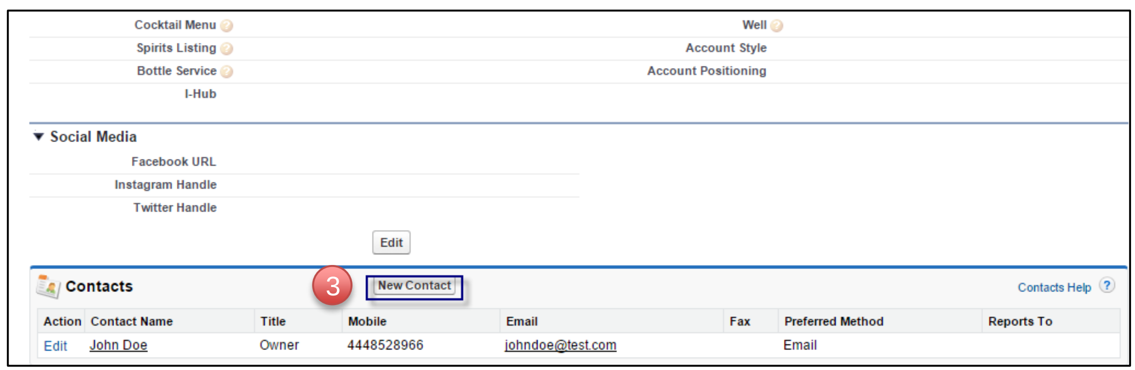
To create a Contact, follow these best practice steps:

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



If you hover your mouse over "Contacts" the related list appears

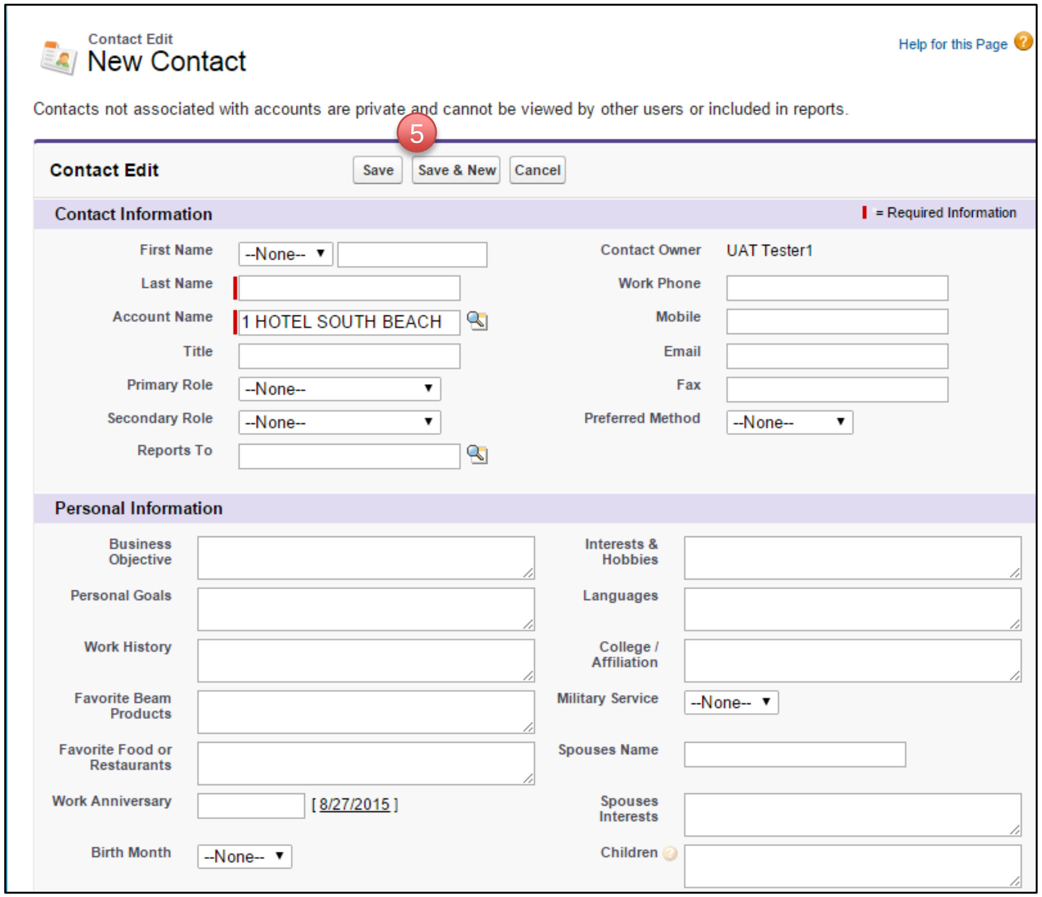
Alternatively navigate to the Contacts list at the bottom of the Account page



Creating Contacts (continued)

Next

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.

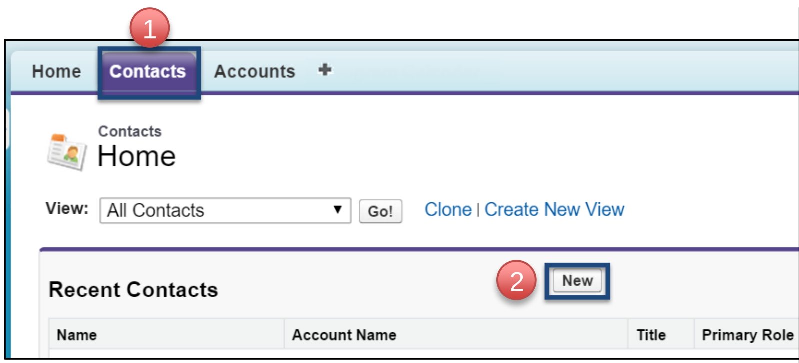


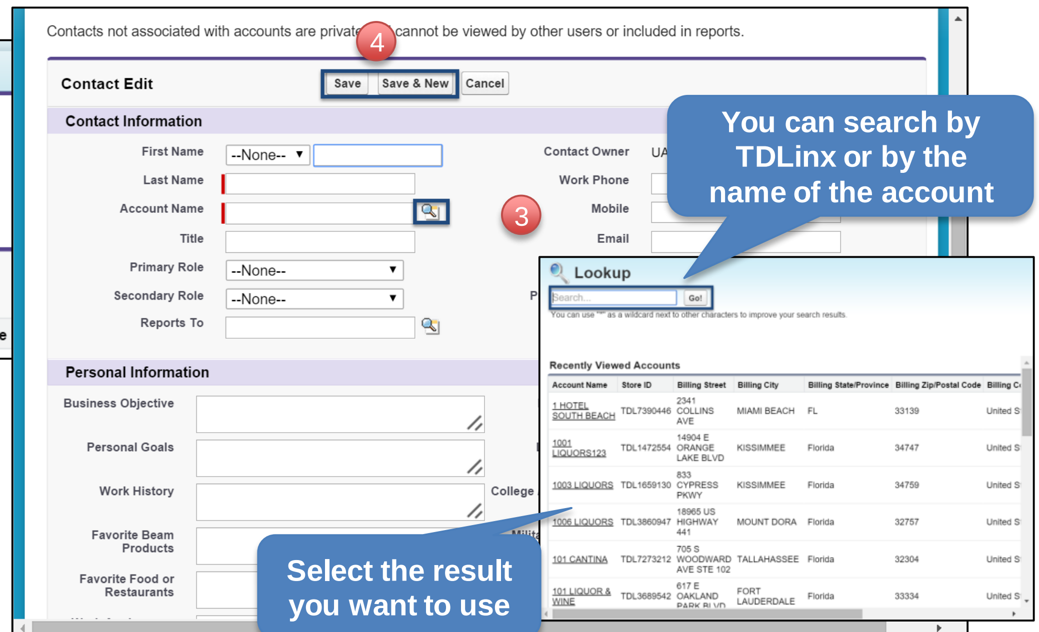
By creating a contact from an Account, the account name is automatically entered

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.





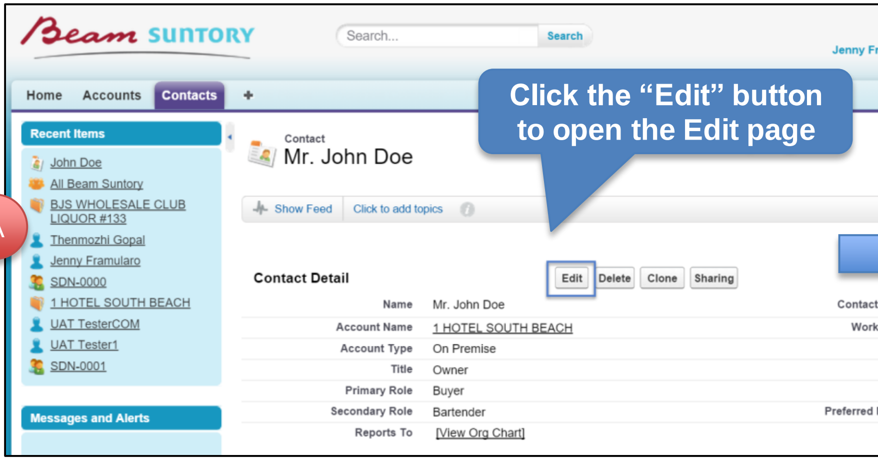
Editing Contacts

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

A. Click the “Edit” button, edit the appropriate fields in the Edit page, and save

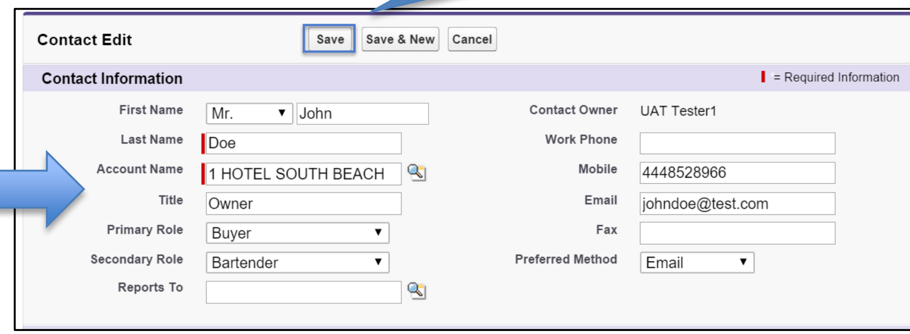
B. Double click the field you would like to edit, make the change, and save the updates

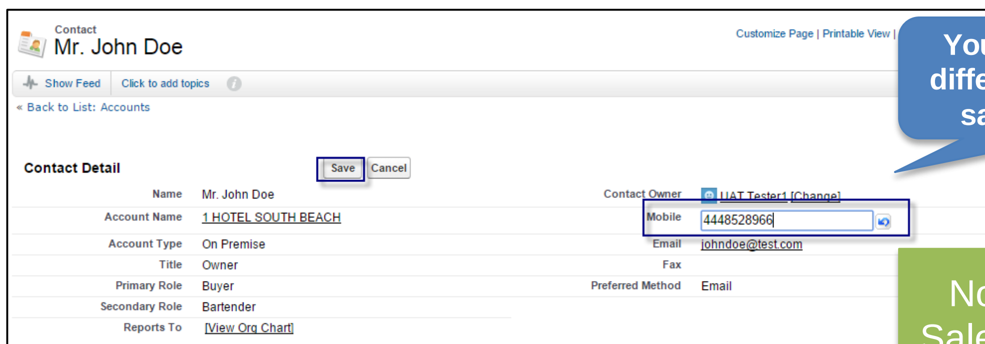
Make your edits, then click the “Save” button



A

Click the “Edit” button to open the Edit page





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

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

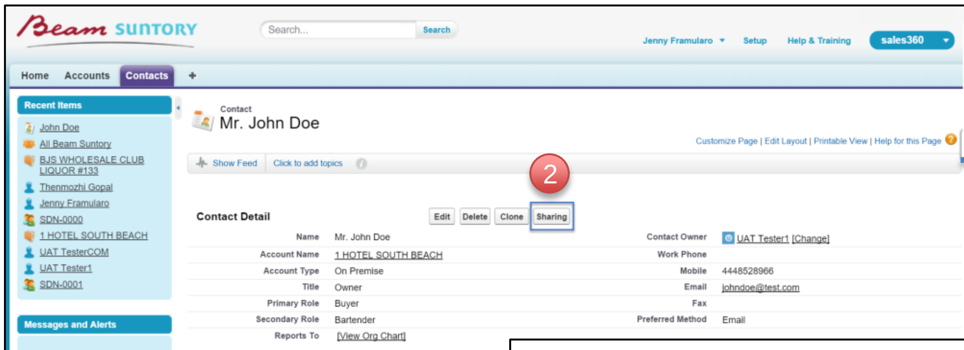
B

Not applicable to Sales Strategy team

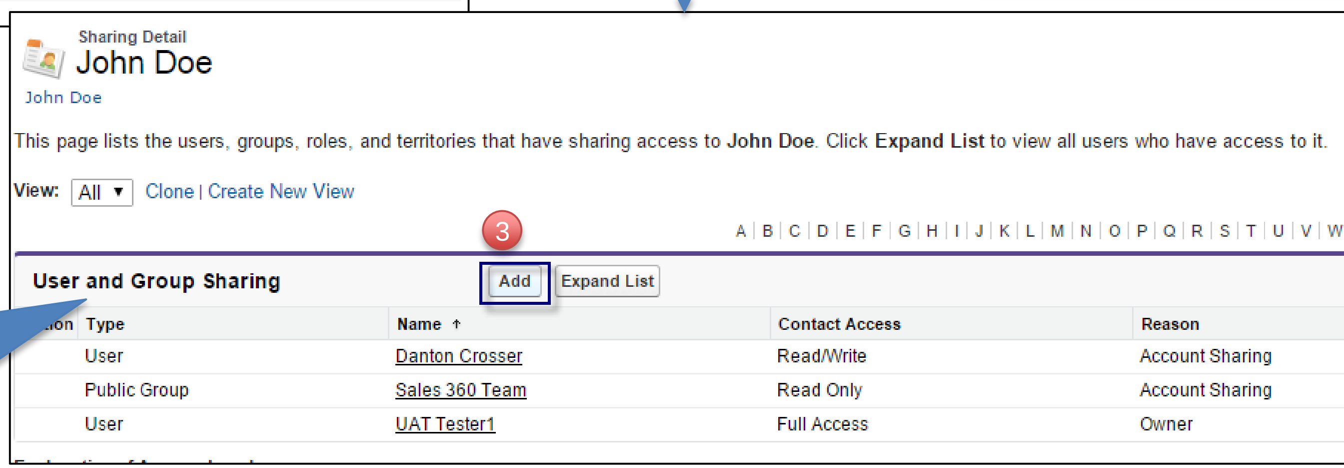
Sharing Contacts

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



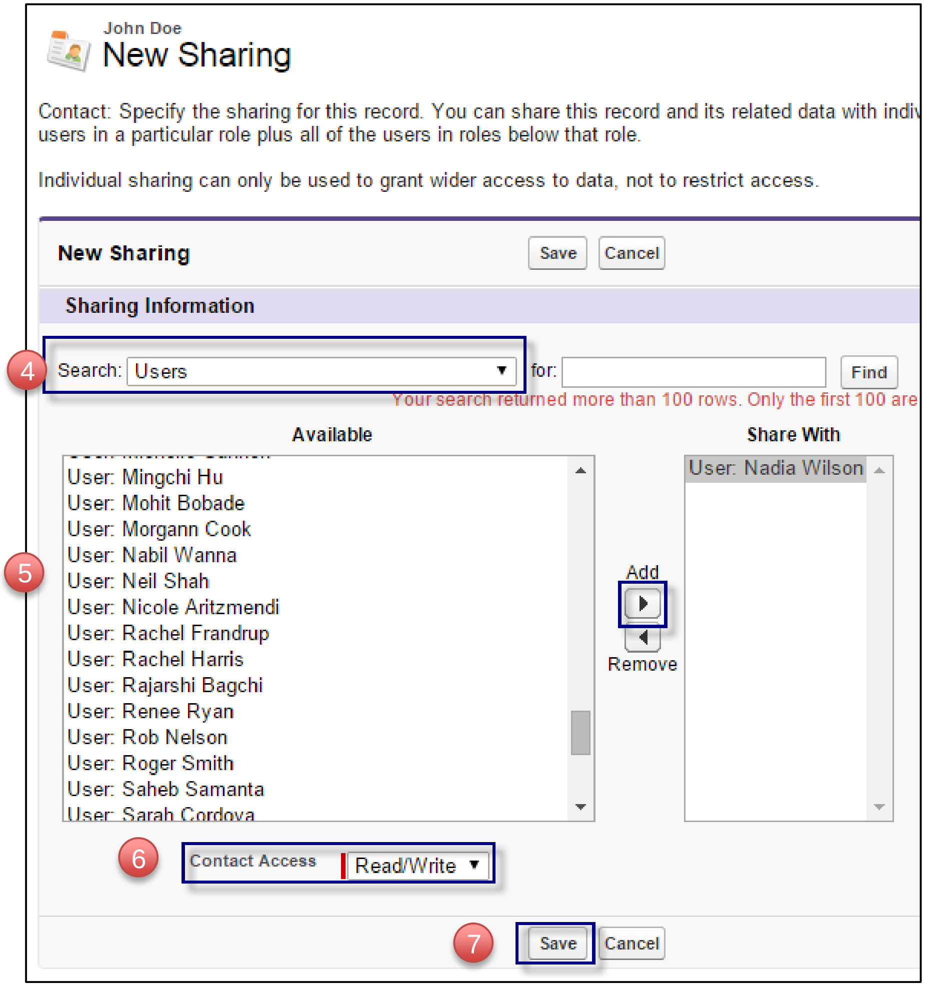
Not applicable to Sales Strategy team



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 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

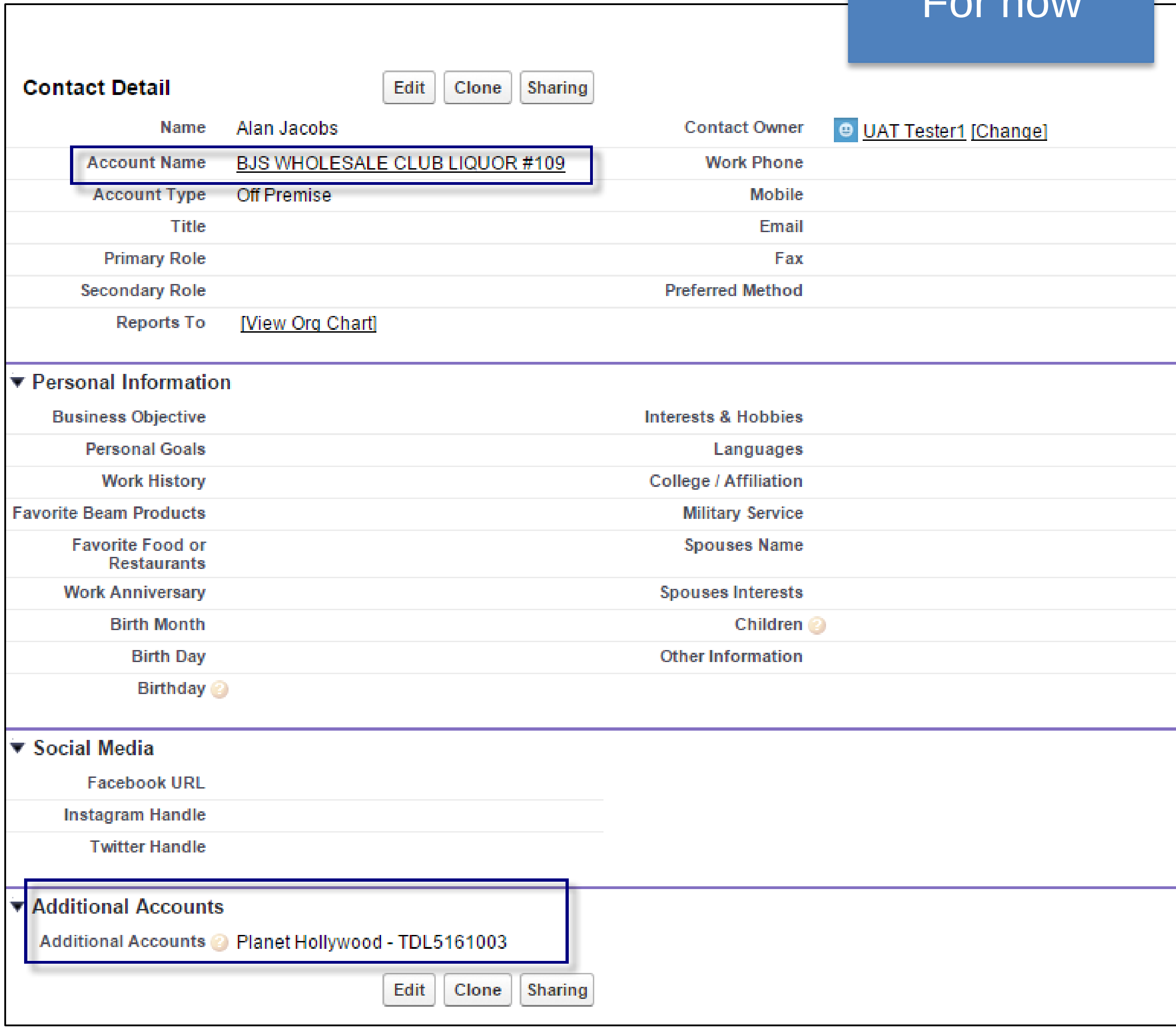


Associating Contacts to Multiple Accounts

For now

For now, additional accounts are indicated via text.

More robust solution coming this fall.



Not applicable to Sales Strategy team

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Resources & Troubleshooting

Self-Help & Reference Material

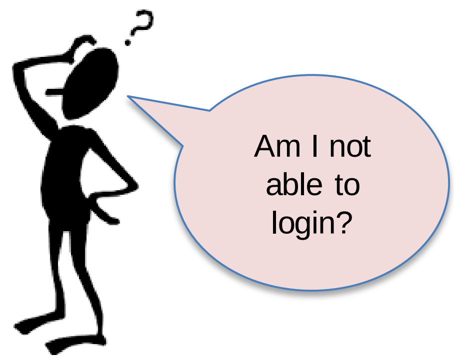
- Review Videos & Training materials stored:
  - Salesforce Reference Material
  - Edge website
  - BeamTube

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