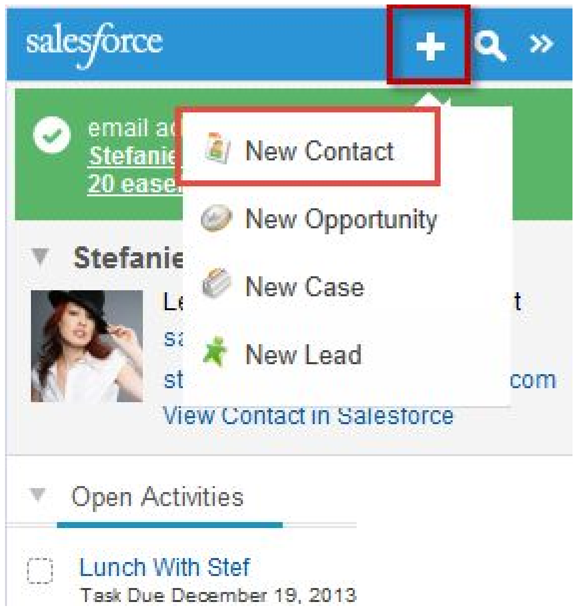
A. Hands On Exercise Scenario: Create a new contact from Outlook side panel

1. Open Outlook. Select an email to open it. The side panel will try to find a matching contact based on the email address. Presumably for training, the email will be from a contact not yet in Salesforce.
2. Assuming that not contact match has been made, use the + sign in the side panel and select 'New Contact'.



3. A new contact will be created in Salesforce.

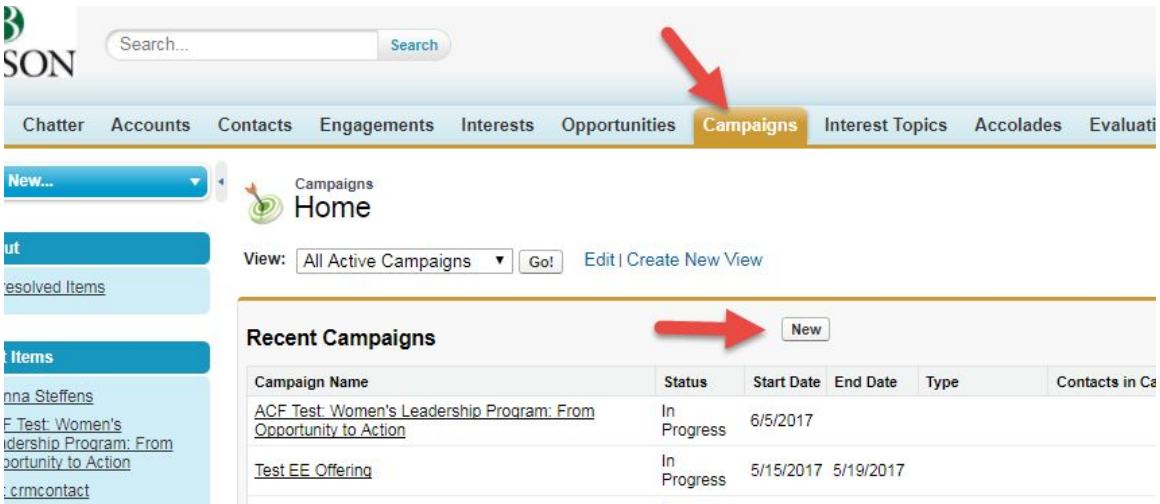
*Additional training from Salesforce:
https://trailhead.salesforce.com/en/modules/microsoft_integration_admin_set_up_integration_products/units/microsoft_integration_admin_set_up_salesforce_for_outlook_unit_2

B. Hands On Exercise Scenario: Sync an email to Salesforce from Outlook to existing contact

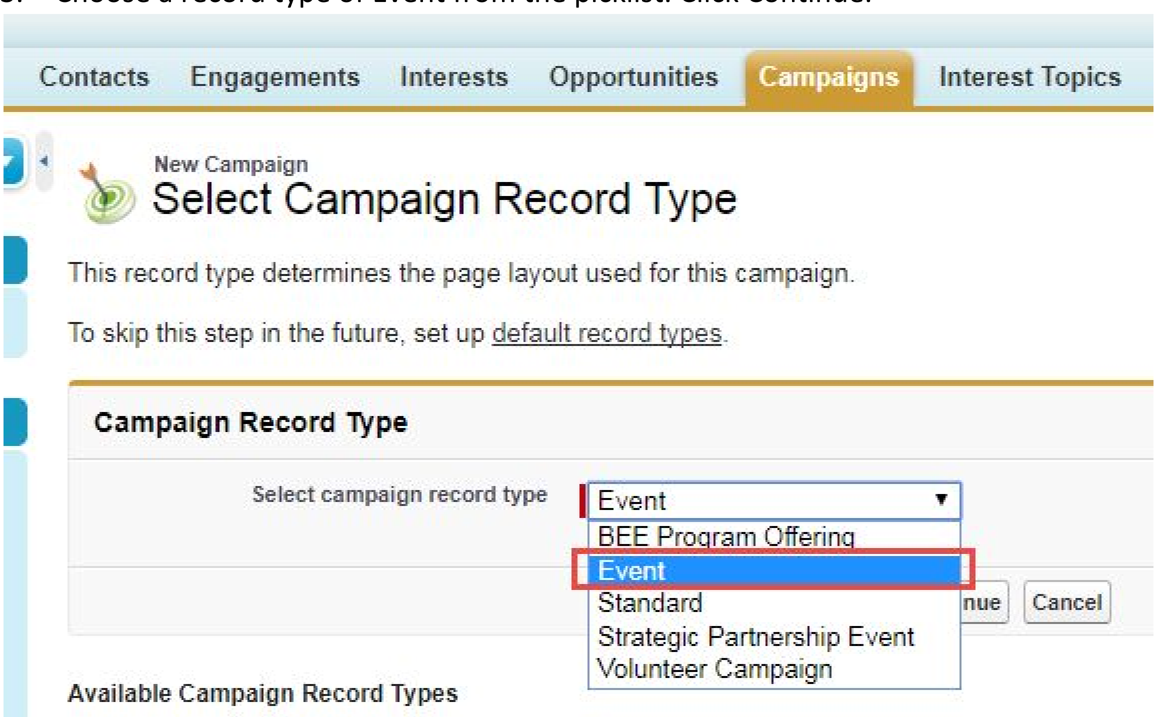
1. Open Outlook. Select an email to open it. The side panel will try to find a matching contact based on the email address. For training, the email will be from a contact, Alanna Steffens (asteffens@acfsolutions.com) that is in the Salesforce test environment.
2. Next step.

C. Hands on Exercise Scenario: Create an Event (Campaign) & associate a contact (participant)

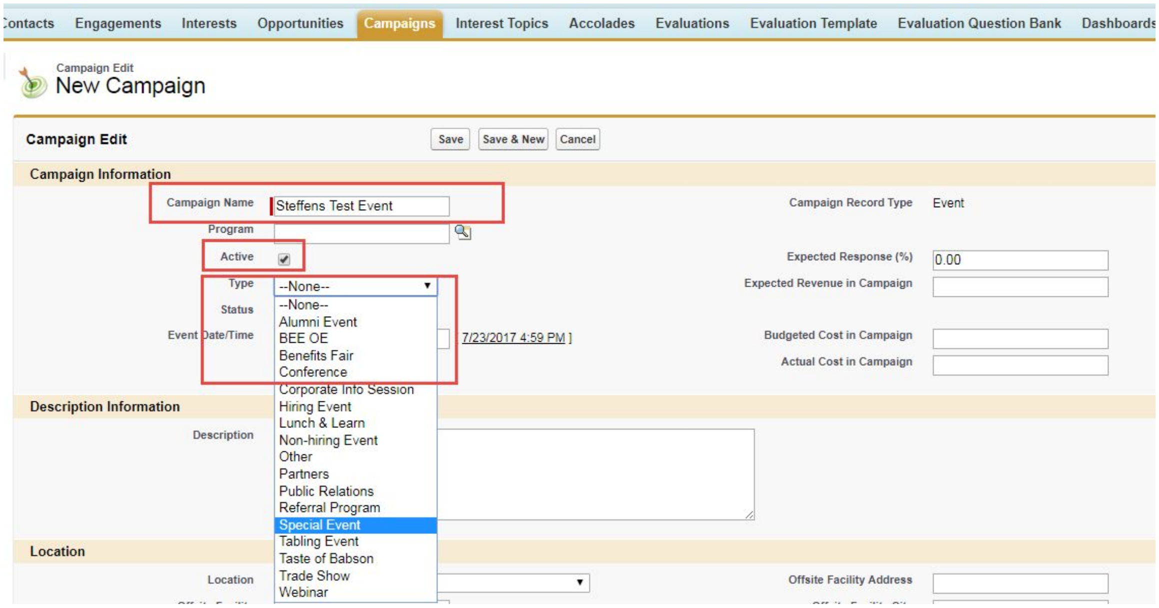
1. Always search for a record prior to creation. Using the global search, search for the name of the event. For training, enter <Your Last Name> Test Event (i.e. Steffens Test Event). Confirm no results are returned within the Campaign object.
2. Click on the Campaign tab and click New.



3. Choose a record type of Event from the picklist. Click Continue.



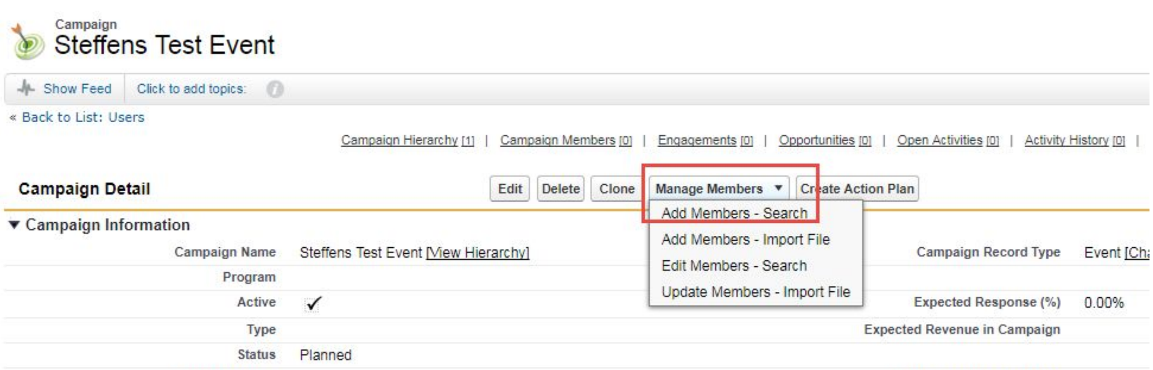
4. For training:
    a. enter <Your Last Name> Test Event (i.e. Steffens Test Event) into the Campaign Name field
    b. Check the Active checkbox.
    c. From the Type picklist, chose any type of event.



5. Click Save.

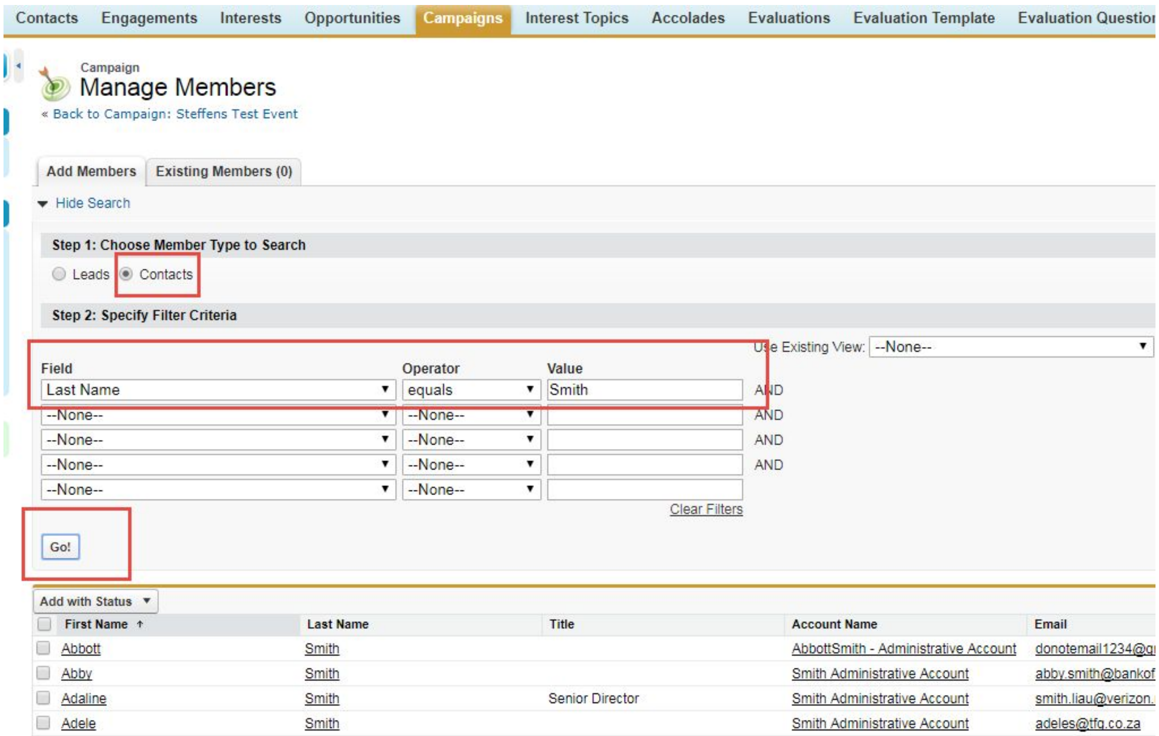
To associate people with the campaign (event participants), there are several ways this can be done. Refer to the Campaign management quick reference guide for all of the possibilities. For training, we'll only be adding one campaign member to our campaign directly from the Campaign record itself using 'Manage Members' member.

1. From the campaign record just created above (<Last Name> Test Event), select "Manage Members", then "Add Members – Search".



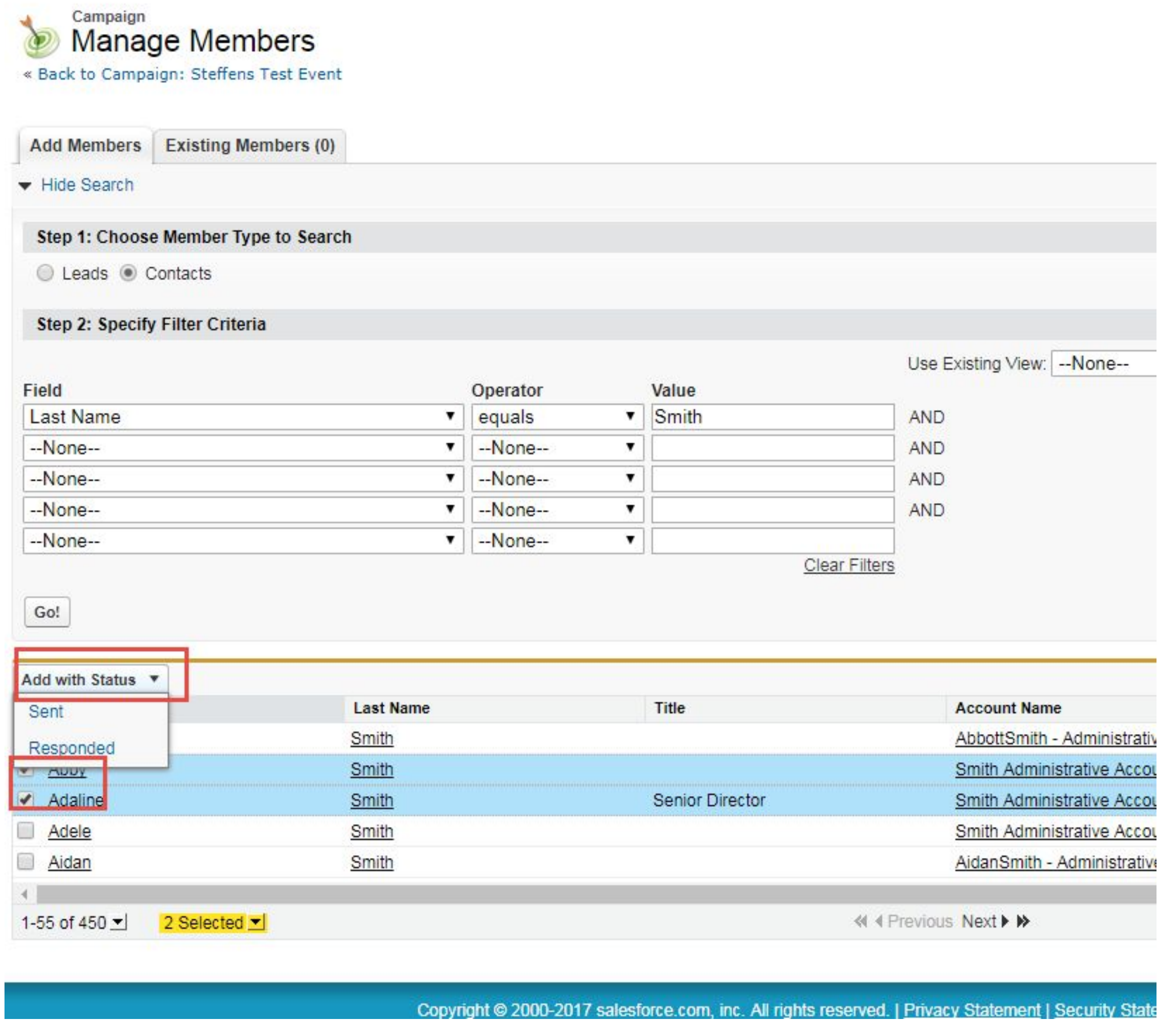
2. Use filter criteria OR an existing Listview to find and select contacts, then add to campaign with the appropriate status by clicking the [Add with Status] button. For

training, chose Last Name as the field, chose equals, and type 'Smith' into the field. Click Go to return a list of all test contacts with a last name of Smith.

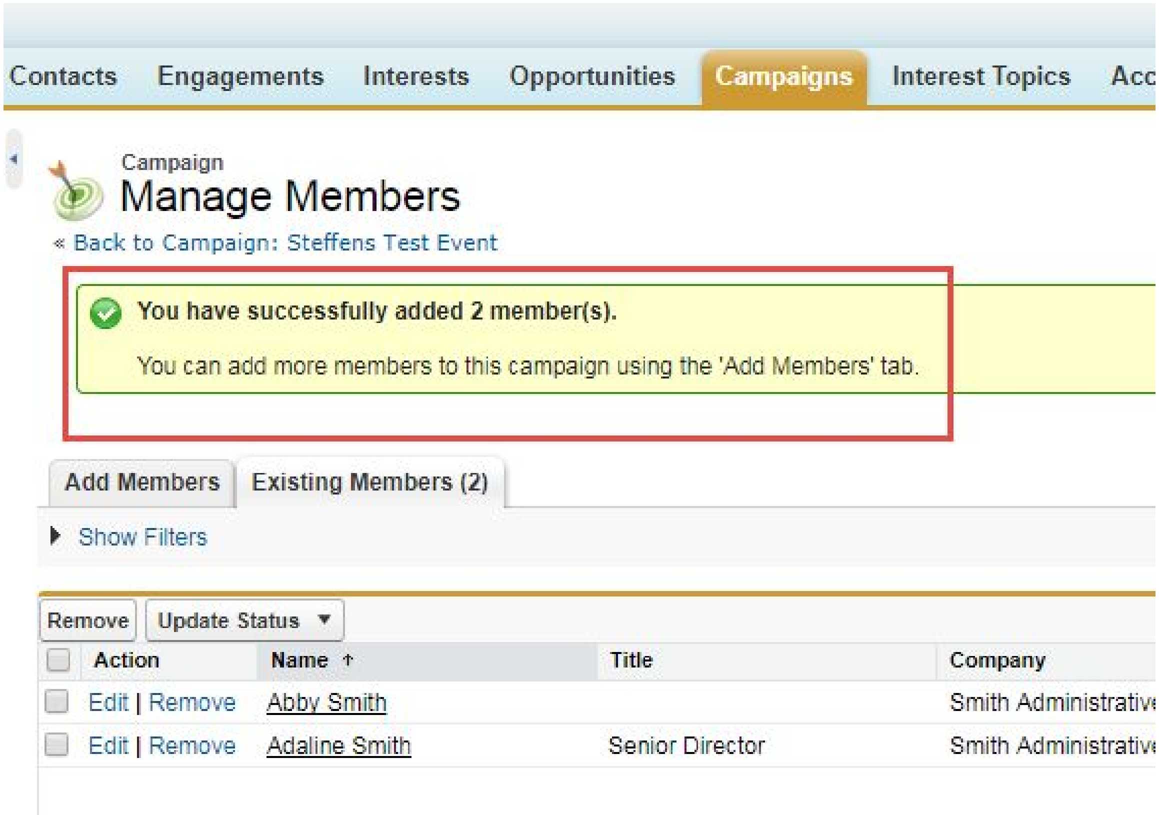


3. Chose one or two contacts and click 'Add with Status' button above the search results.

   Note: The Campaign Member status values may vary depending on the type of campaign. (Mail campaign may have "Sent" and "Responded" while an Event may also include "Attended" and "Cancelled").

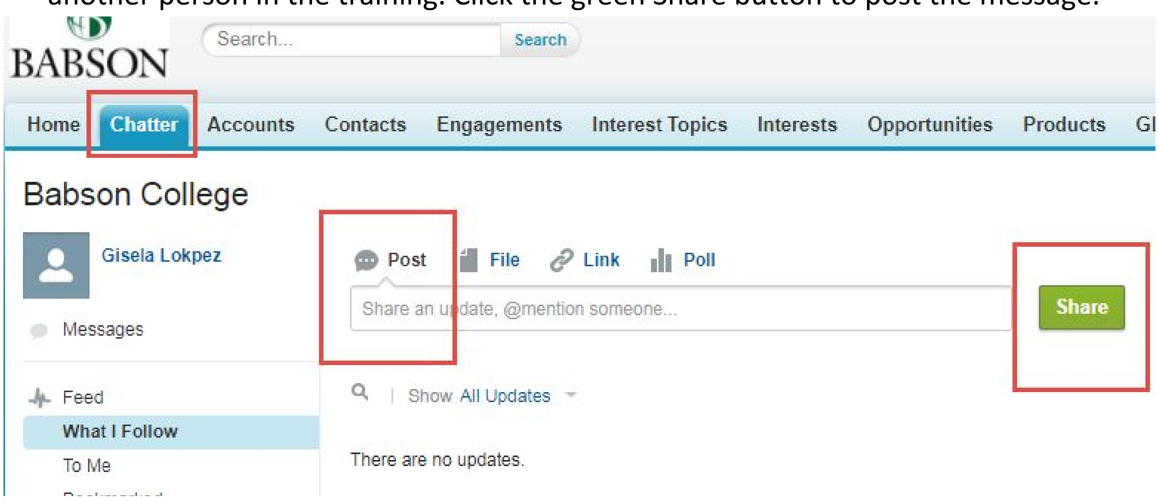


Visually see confirmation message that your contacts have been added.



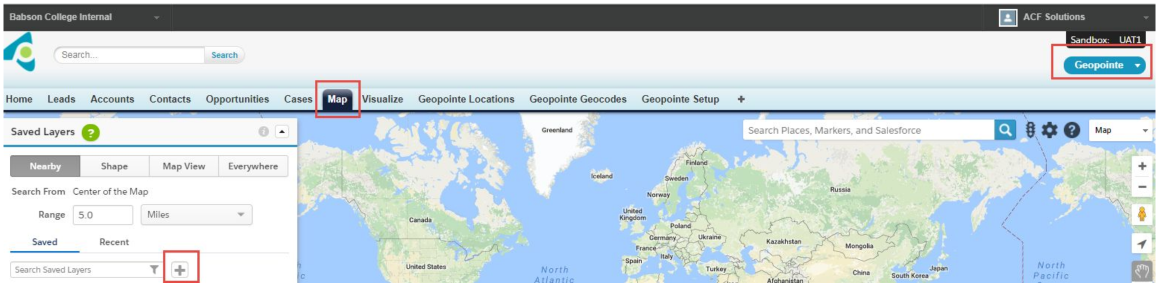
D. Hands On Exercise Scenario: Post a chatter post

1. Navigate to the Chatter tab by clicking on it.
2. In the middle section, Post is selected as default. Write a message and @ mention another person in the training. Click the green Share button to post the message.

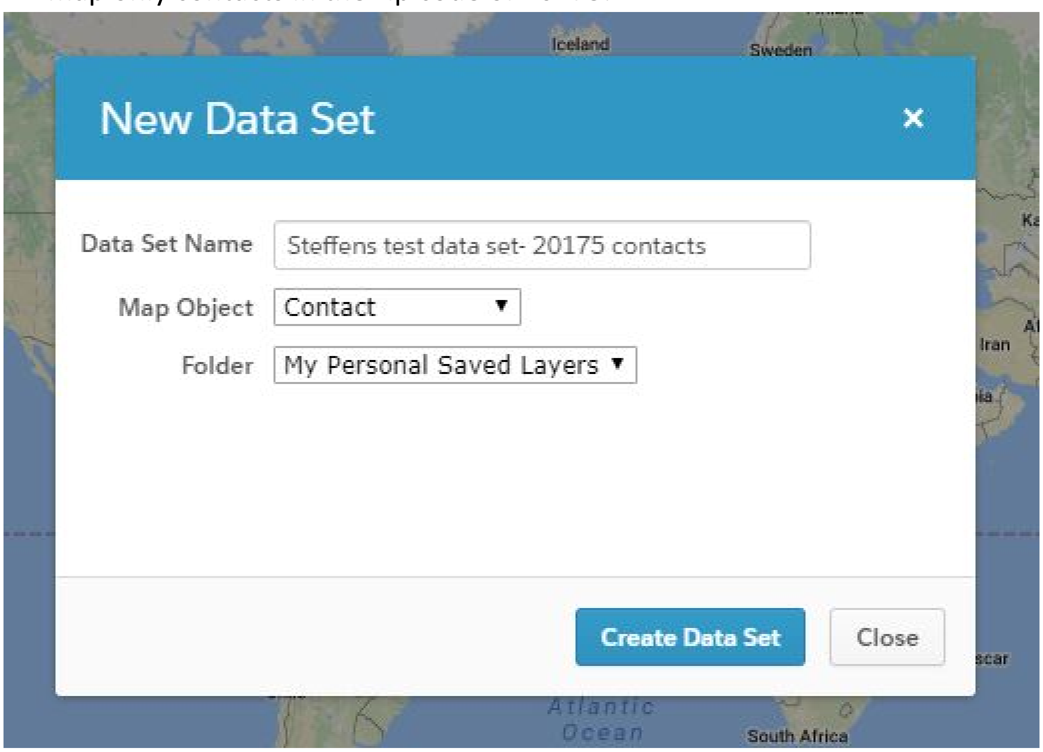


E. Hands On Exercise Scenario: Create a GeoPointe Layer

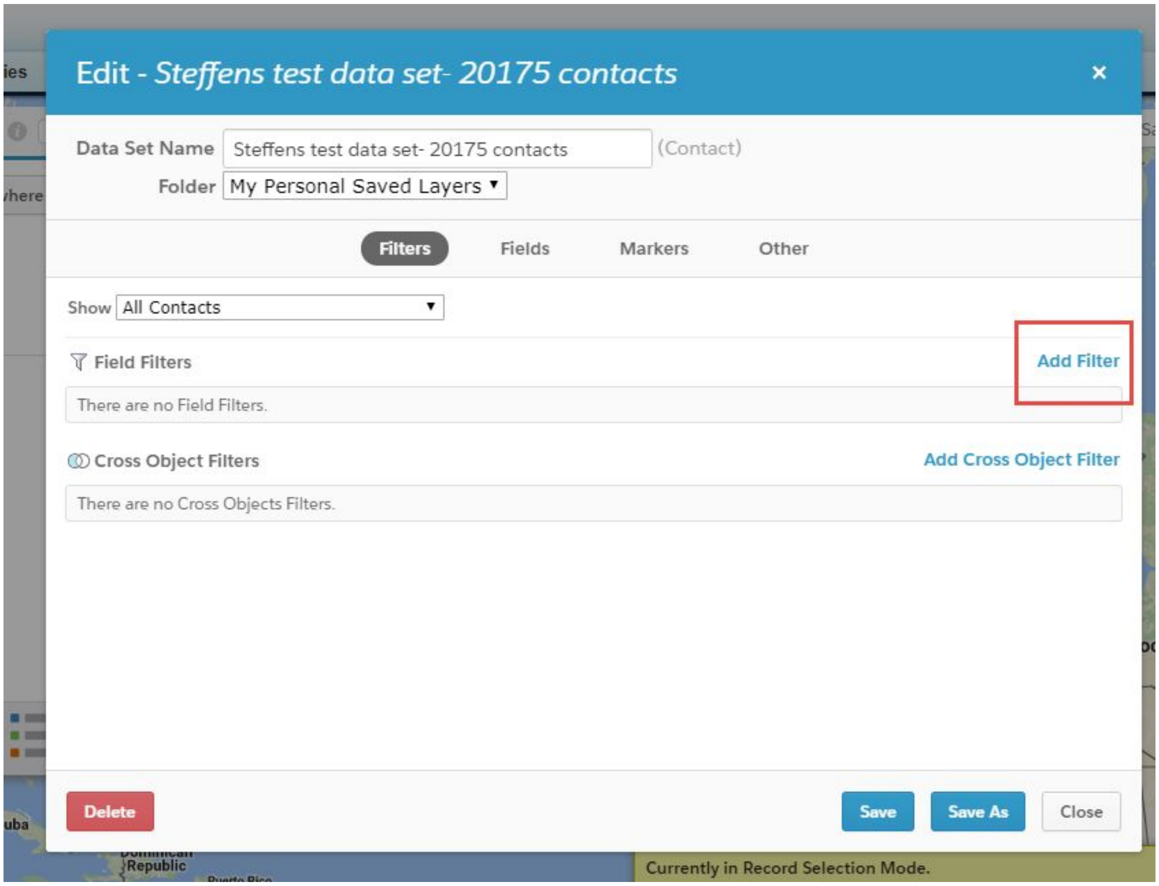
1. From the app menu, select Geopointe. By default, the Maps tab is selected. Select the Plus sign within the Maps tab to create New.



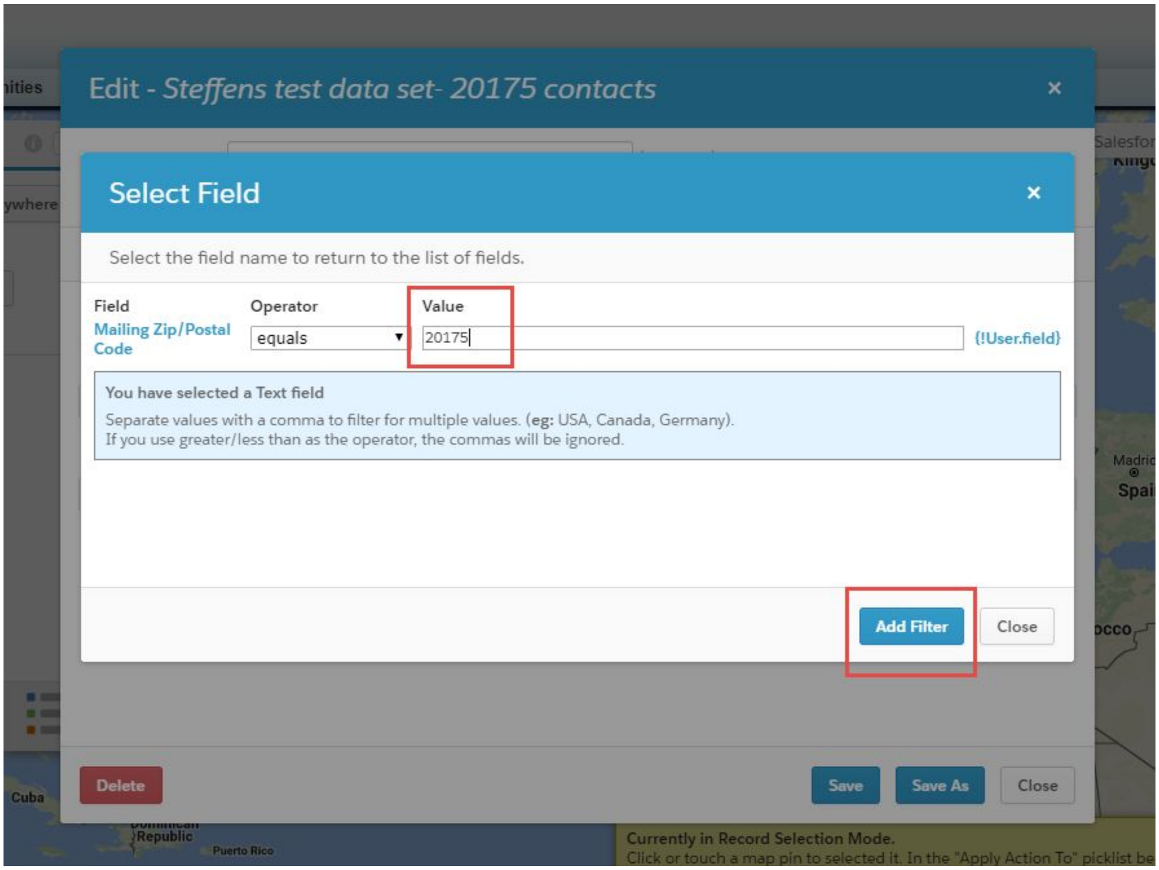
2. Chose Create New Data Set. This defines what records we want to be mapped.
3. Give the data set a name. This name should identify what records will ultimately return in the set. Select Contact in the Map Object drop down. Leave the folder as My Personal Saved Layers. Click Create Data Set. For this example, I'll be looking to map only contacts in the zip code of 20175.



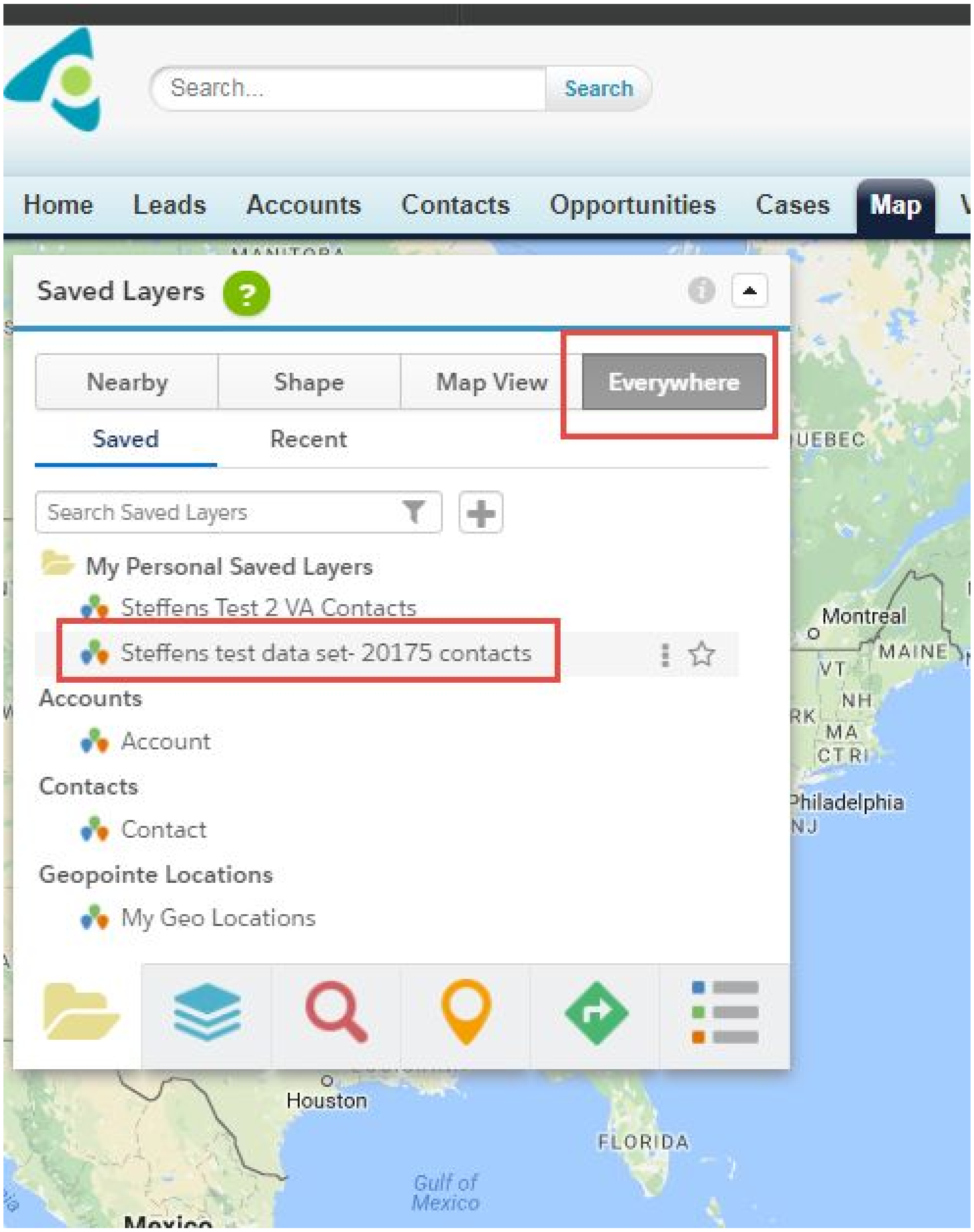
4. Select Add Filter



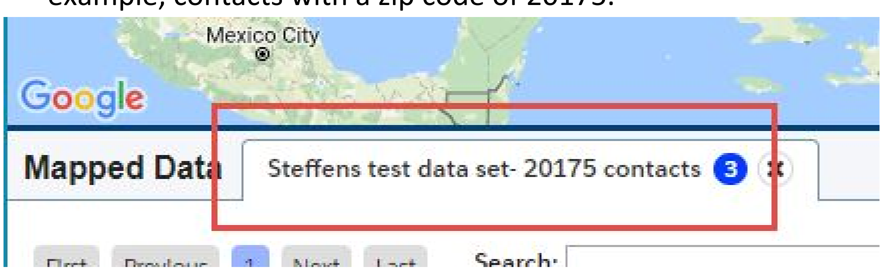
5. Start typing in the name of the field, Mailing Zip, and the list will shorten to find that field. Select the field name from the list and click Select.
6. Enter a value, 20175 for this example, and click Add Filter.



7. Click Save. Click Save again to the overwrite message. Click Close to return to the map.
8. From the Map menu, select Everywhere, then click the name of your newly saved data set.

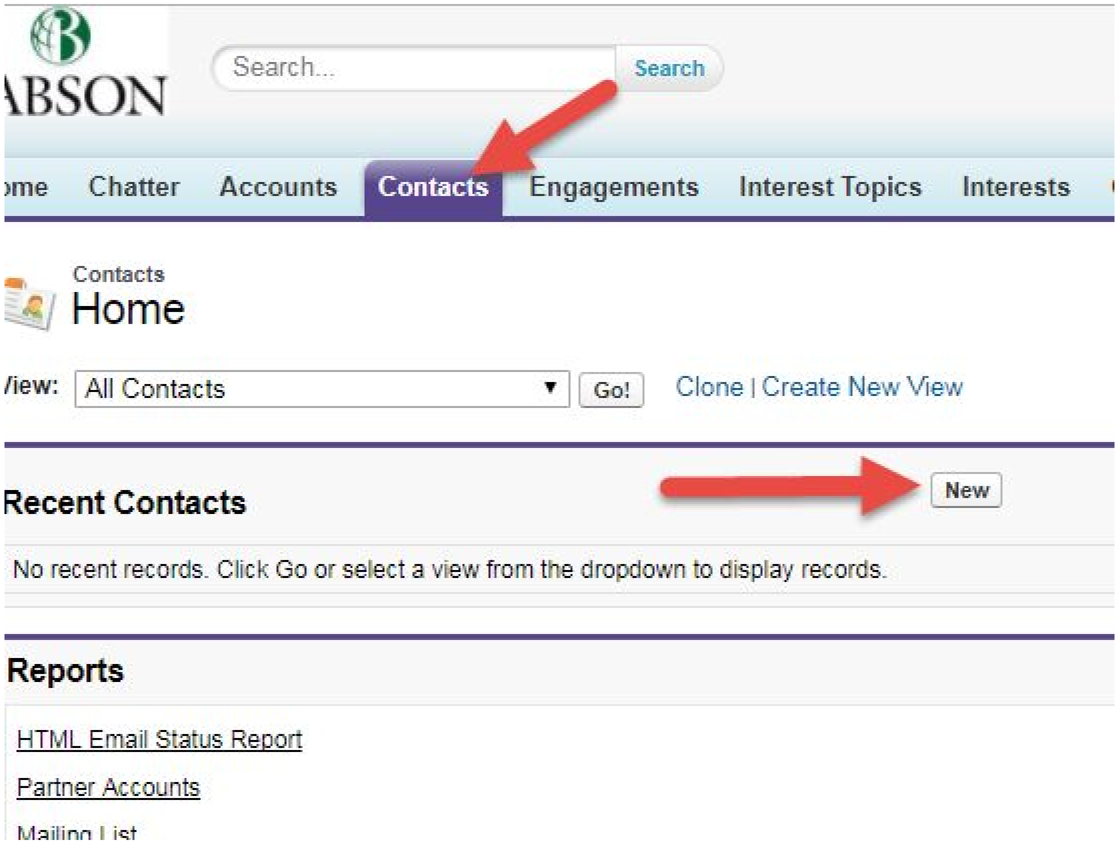


9. The map will refresh as it finds contacts that meet the specified criteria, for this example, contacts with a zip code of 20175.

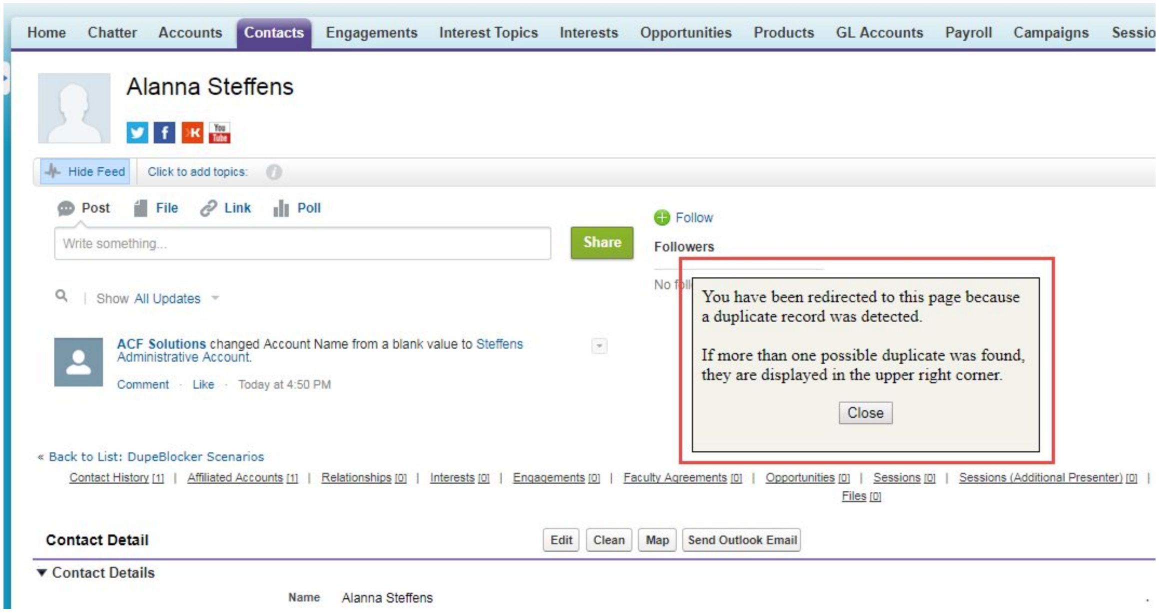


F. Hands On Exercise Scenario: Attempt to create a duplicate contact

1. From the Contact tab, click New. Create a duplicate contact in Salesforce where First Name = Alanna, Last Name = Steffens, Work Email = asteffens@acfsolutions.com and Preferred Email Type = 'Work'. Click Save.

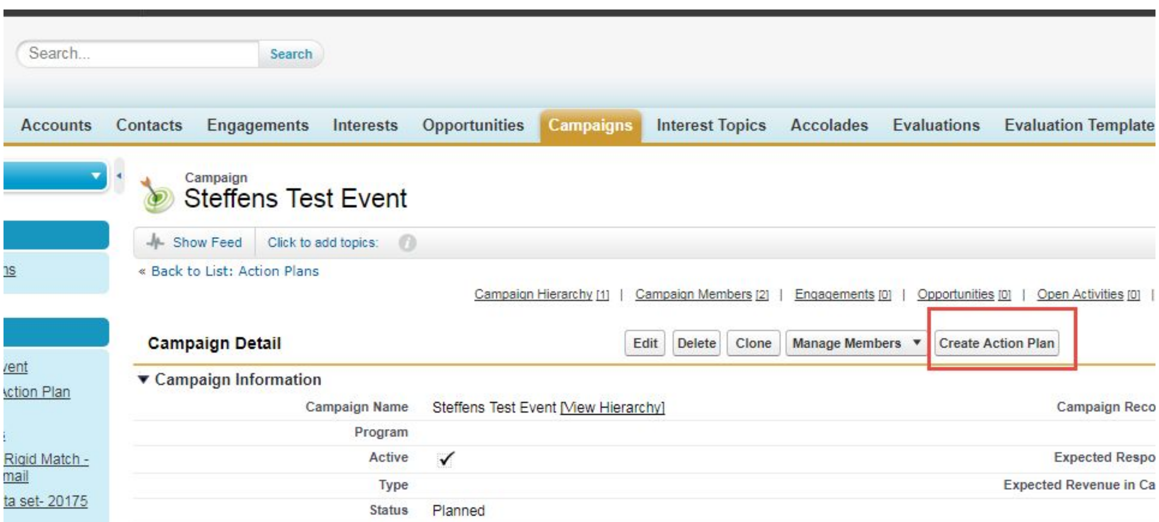


2. An error message should appear indicating that a duplicate exists and you are routed to the existing Contact record.

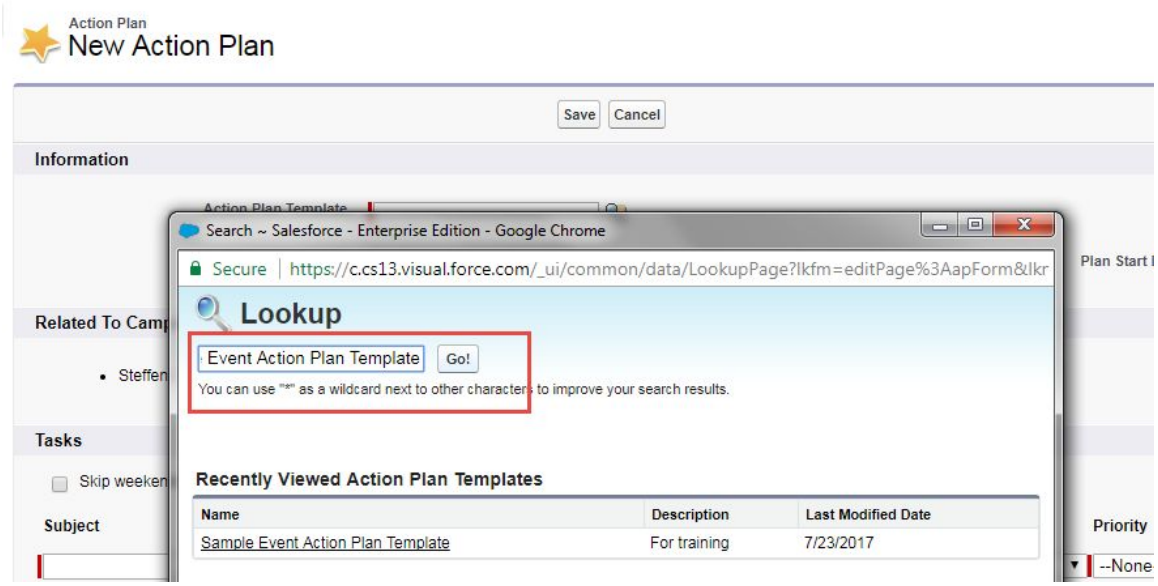


G. Hands On Exercise Scenario: Action Plans

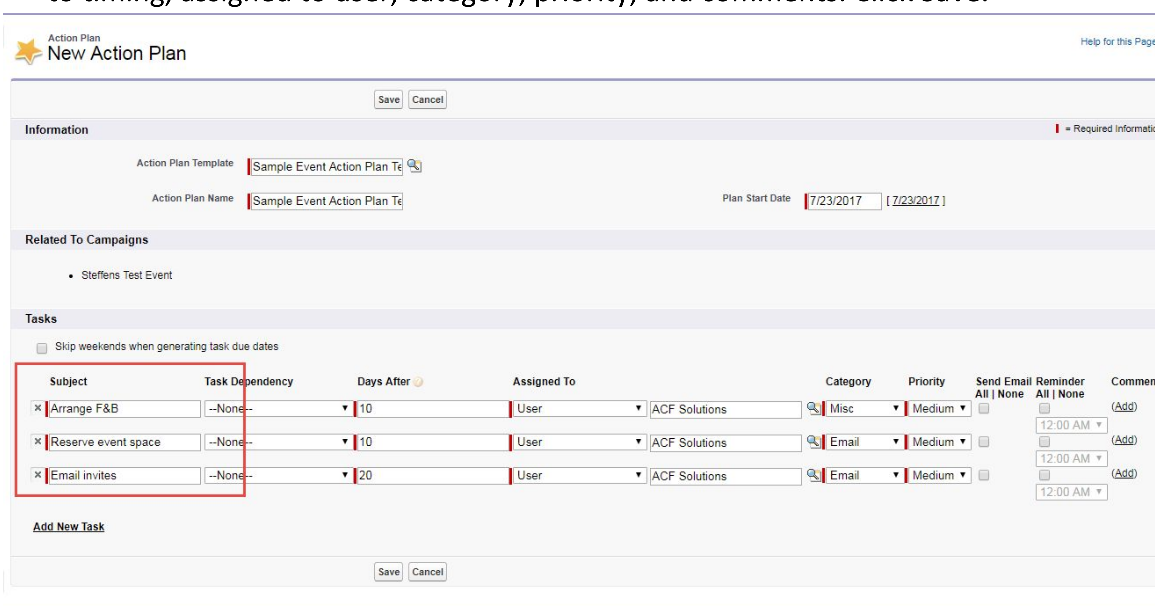
1. From the sample campaign used earlier, click the name of the campaign record. Click on the Create Action Plan button.



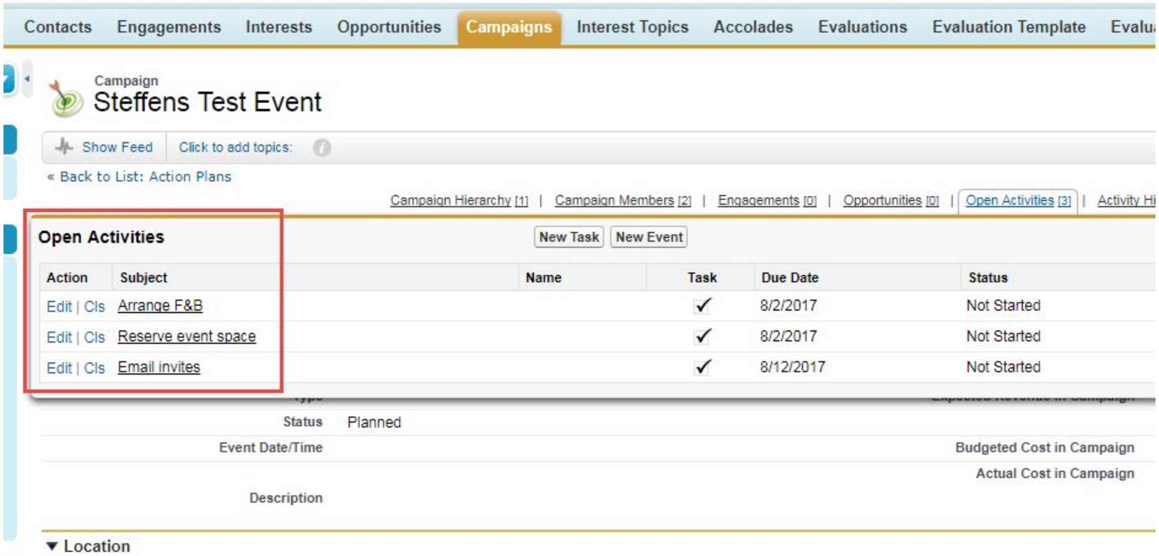
2. Click the magnifying glass icon to lookup an action plan template. In the search, type in ‘Sample Event Action Plan Template’. Click Go.



3. Select the returned result by clicking on the name.
4. The templates predefined task will auto populate. Adjust any of the settings related to timing, assigned to user, category, priority, and comments. Click Save.

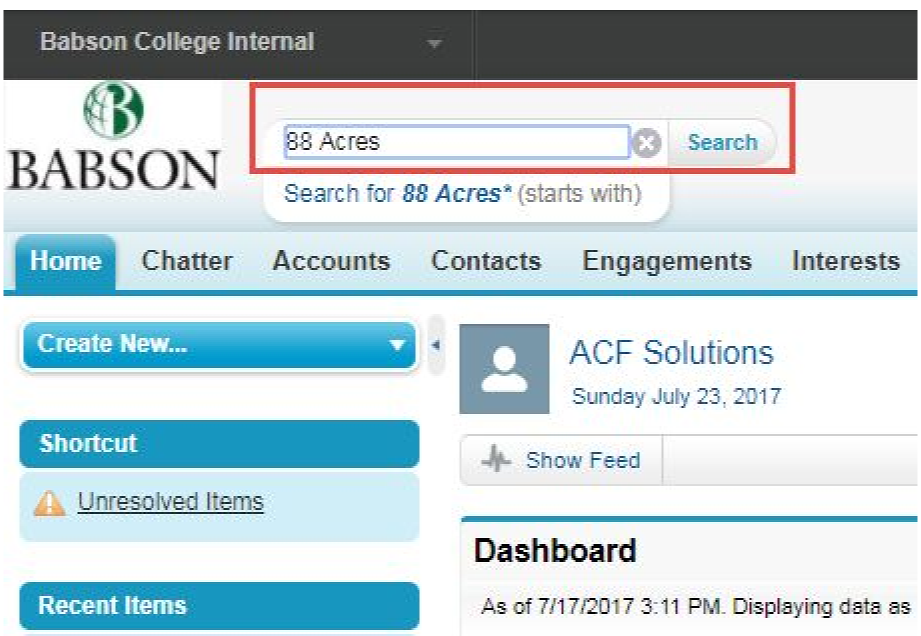


5. The newly created tasks will now show in the Open Activity related list. Once items are marked as completed, they will move to the Activity History related list.

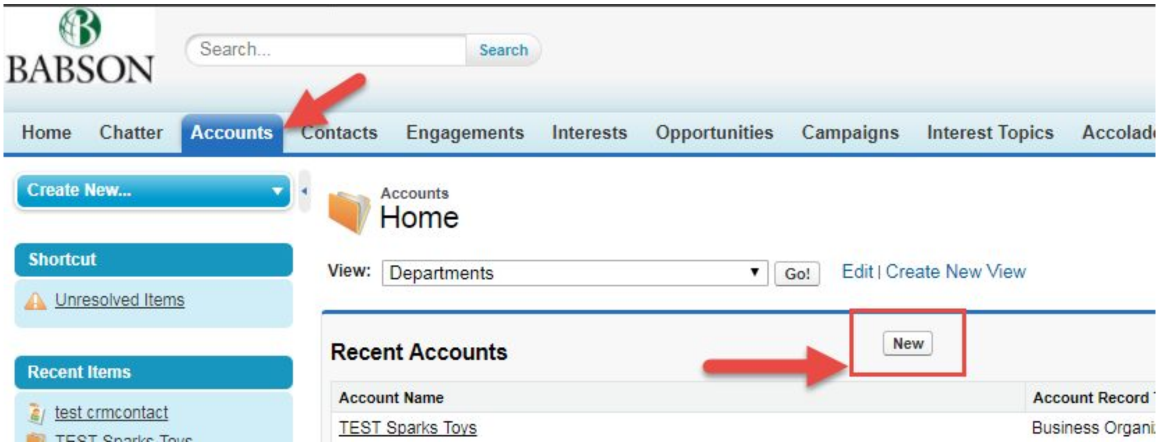


H. Hands On Exercise Scenario: Create a new Account

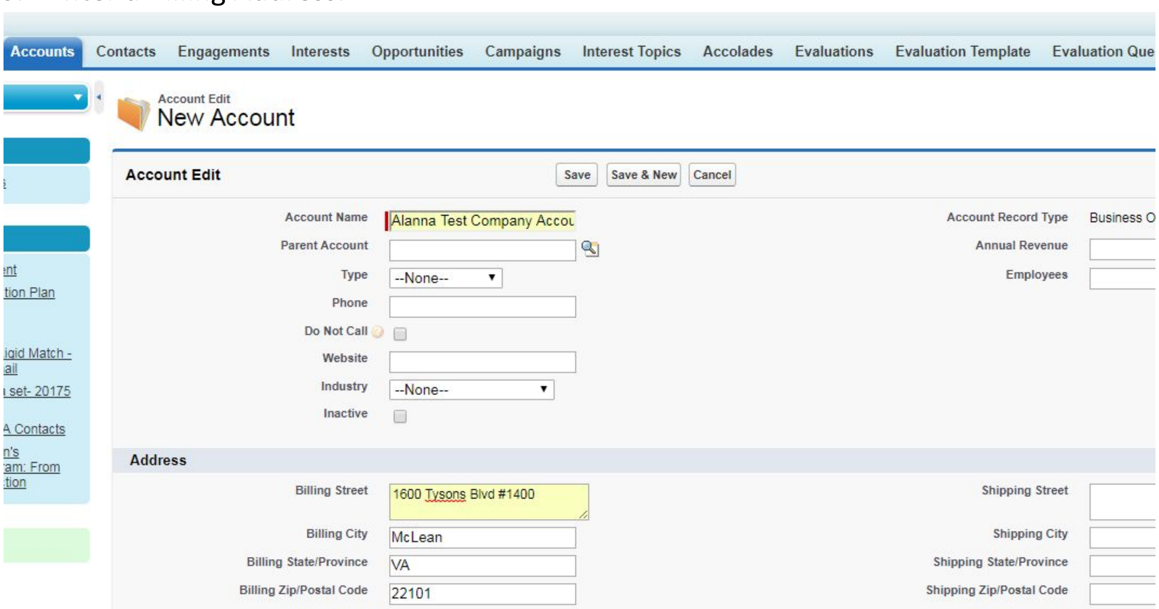
1. Before starting, always begin by searching for the Account's name using the Global Search bar to ensure that no duplicates exist.



2. Go to the Accounts tab.
3. Click New to create a new Account.



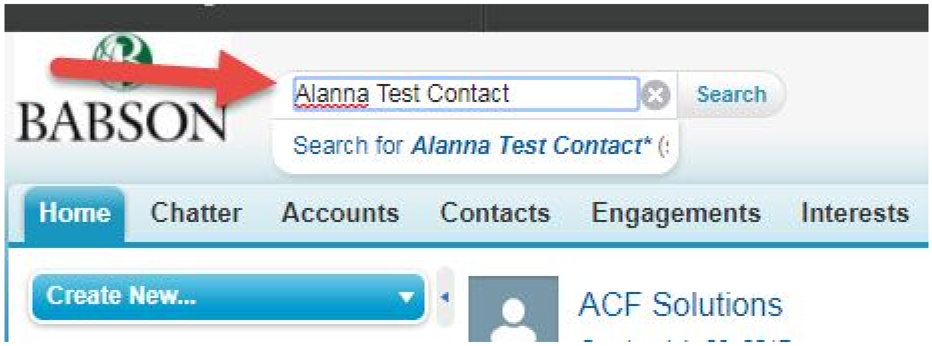
4. Select the applicable record type, for this purpose, Business Organization.
5. In the Account Name type <*insert your first name*> Test Company Account (ex: Alanna Test Company Account) as the Account name. (required)
6. Enter a Billing Address.

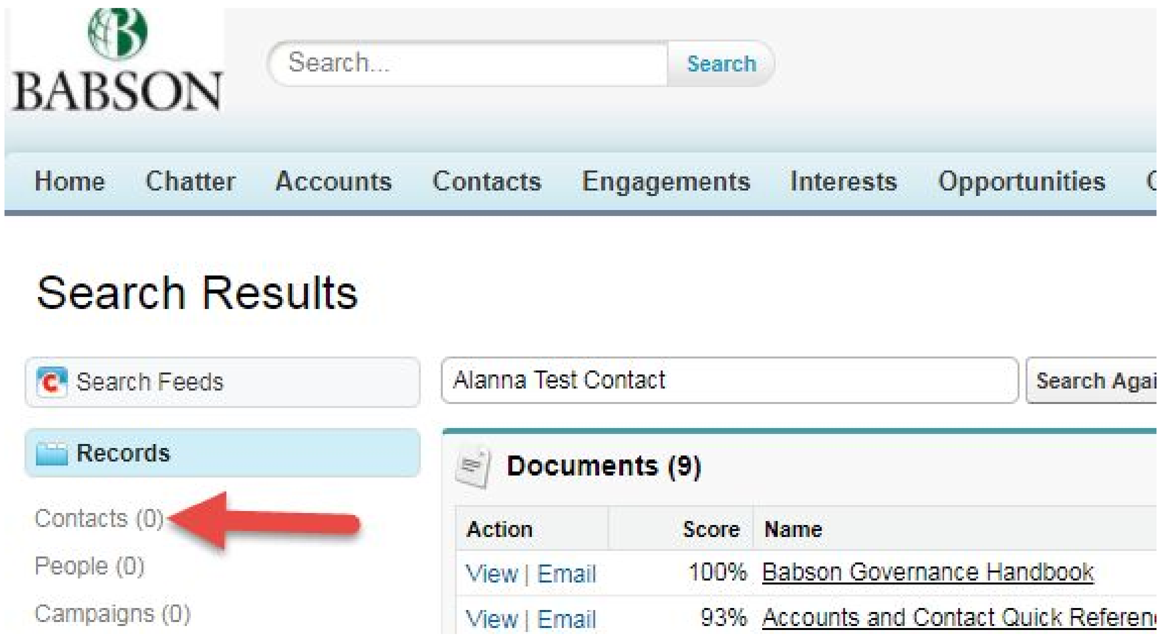


7. Click Save.

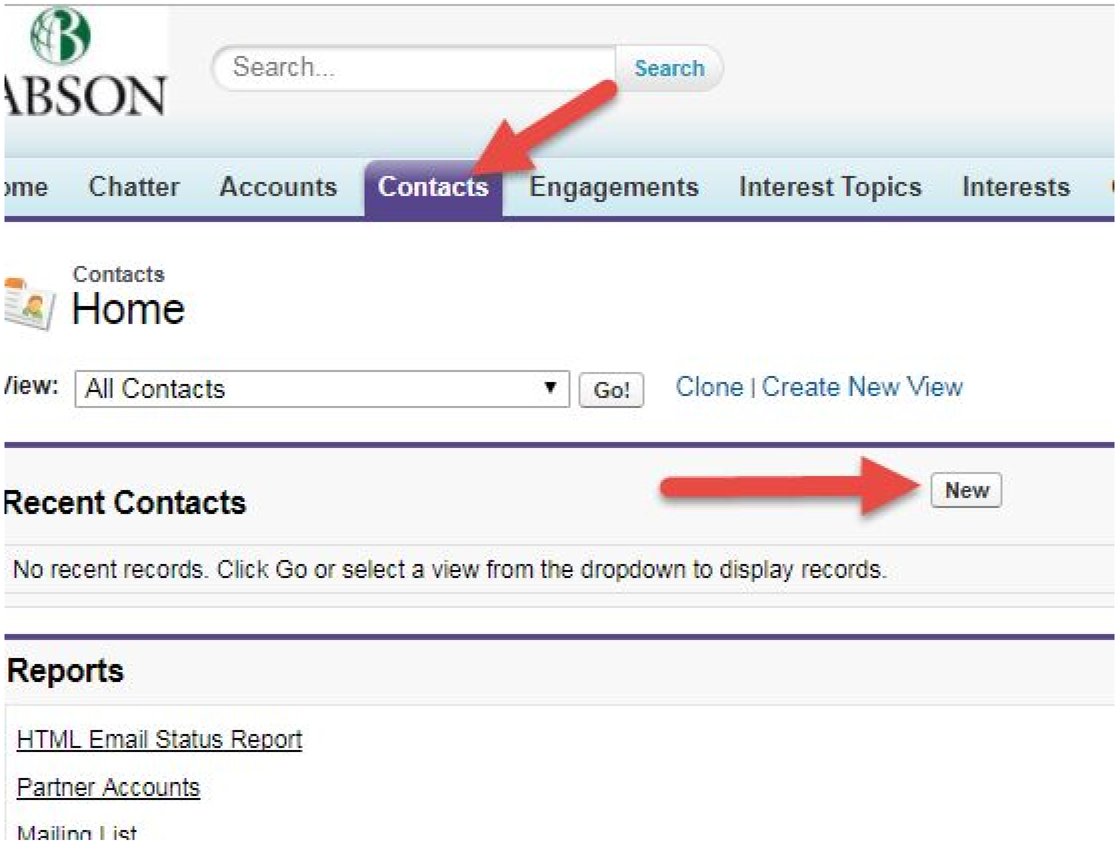
<u>I. Hands On Exercise Scenario: Create a new Contact</u>

1. Begin by searching for the contact's name using the Global Search bar to ensure that no duplicates exist. For this exercise, use '<Your First Name> Test Contact' (i.e. Alanna Test Contact). No results in the <u>Contact</u> list should return.





2. From the Contact's tab, Click New.



3. The following information is captured for this contact (randomly input any information unless specified):
    a. First Name: *<insert your first name>*
    b. Last Name: Test Contact

Fill out the required fields (leave Title blank). Leave the Account Name field blank! This value will auto-populate after you click save.

4. Leave the Title blank for now, we will address this later.
5. Fill out a few other contact related fields.
6. Click Save.

<u>J. Hands On Exercise Scenario: Edit an existing contact record</u>

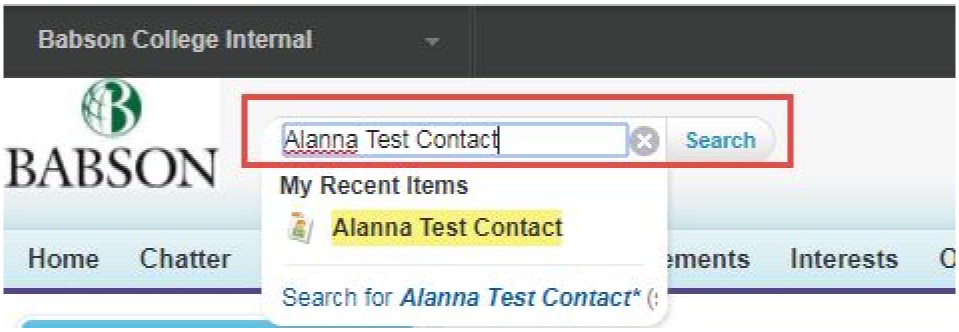
1. Go to the test contact you've just created.
2. Click the 'Edit' button.
3. Enter in a Title for the test contact.
4. Click Save.

<u>K. Hands-On Scenario Exercise: Creating Interest record</u>

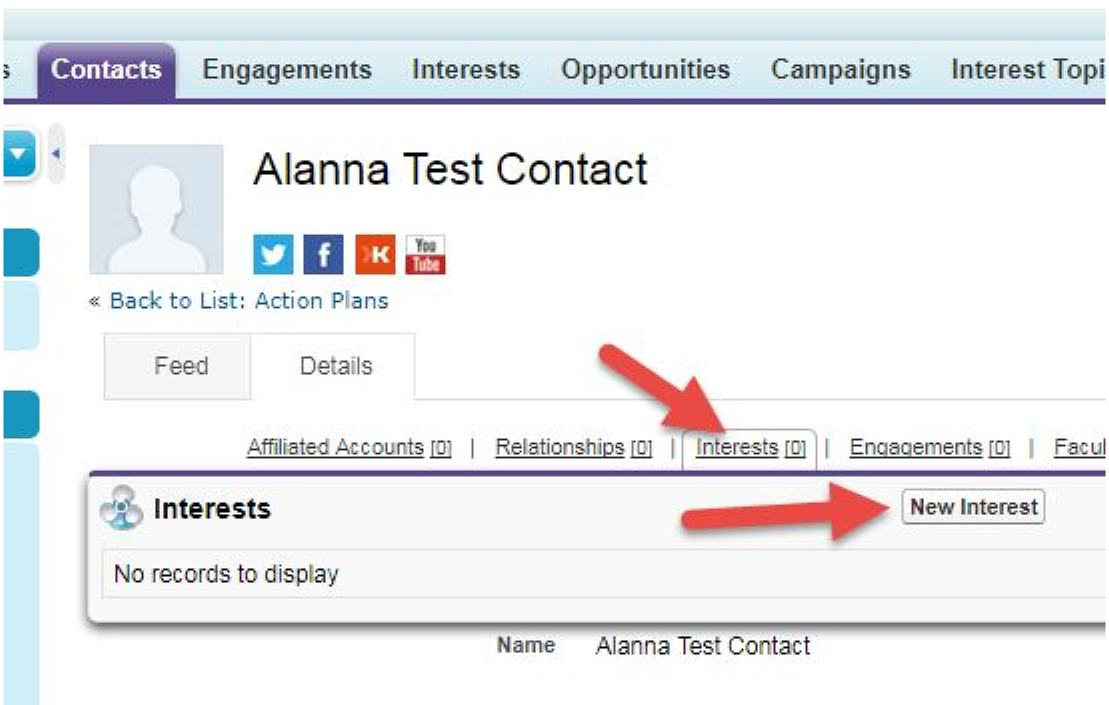
Interest records will primarily be created via the revised RFI forms on the Babson website. Interest records may also be manually created from within the SF GUI.

Create an Interest record manually

1. Start by searching for the contact using the Global Search at the top of the page. For this example, <Your First Name> Test contact.



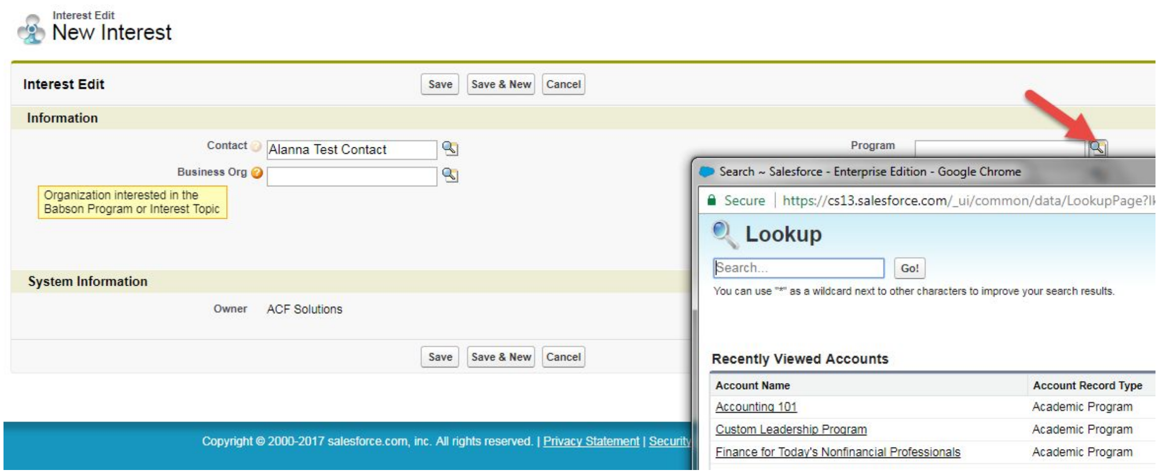
2. Click on the Name of the contact to open the contact record. If a contact is not found, a new contact will need to be created.
3. Navigate to the Interests related list.
4. Click New Interest.



5. Fill out the required information for capturing the person's interest in a program. If there is more than one program interest to be records, click Save & New to

create the next record. If the interest is on behalf of a company, specify the company in the Business Org field (This assumes that the account record already exists in Salesforce. If it does not, this will need to be created first).

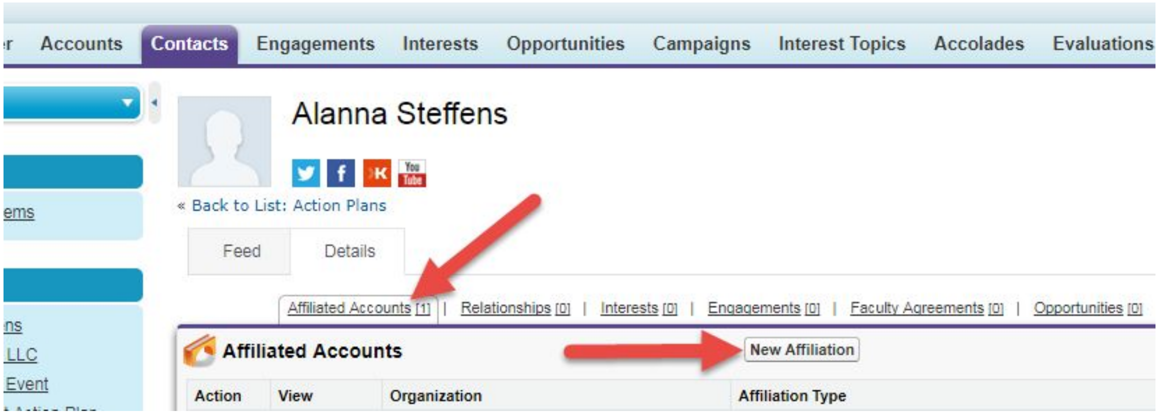
6. To fill out fields with a magnifying glass beside it, these are called lookup fields. Lookup fields are populated by referencing a related record. In this example, the lookup is finding the correct program that will be referenced in the program interest record.



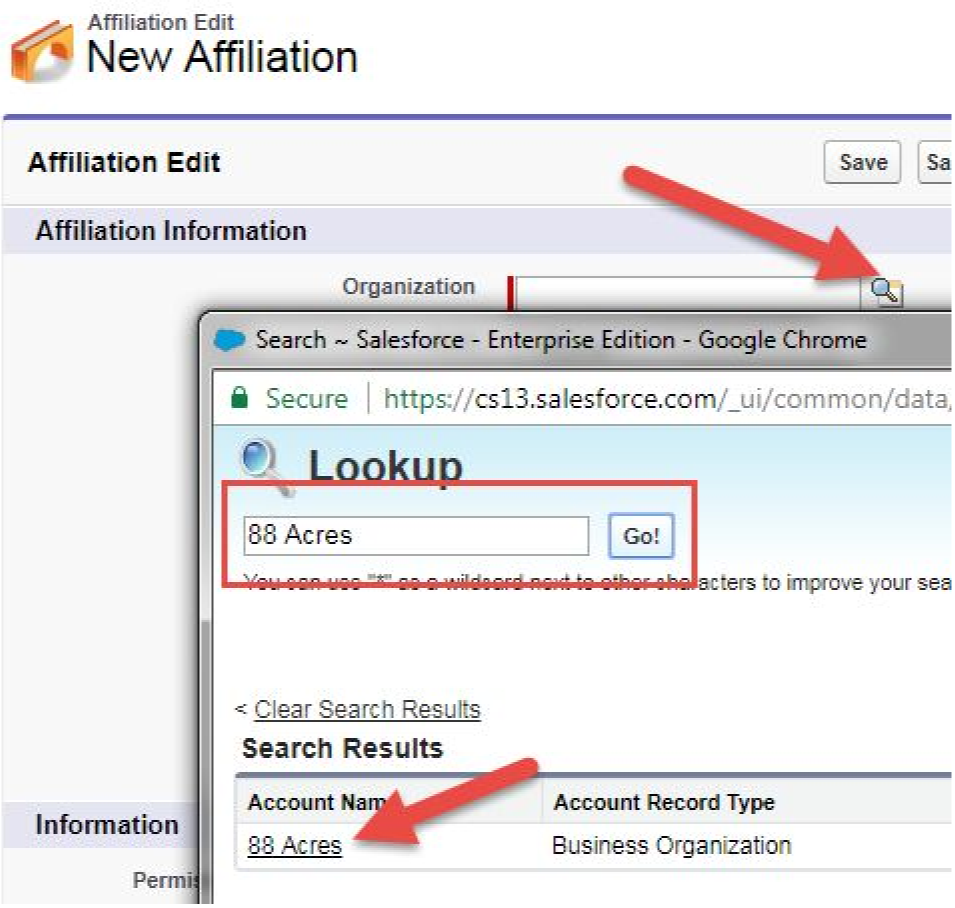
7. Click Save or Save and New to create a new record.

L. <u>Hands On Exercise Scenario: Affiliations - Relate a Contact to Additional Accounts</u>

1. We determined that your test contact is an employee at another company, 88 Acres, which is another account with record type - Business Organization, and we want to capture that additional organization affiliation.
2. Go to your test contact's record (<First Name> Test Contact).
3. Navigate to the Affiliation Accounts related list.
4. Click the 'New Affiliation' button.

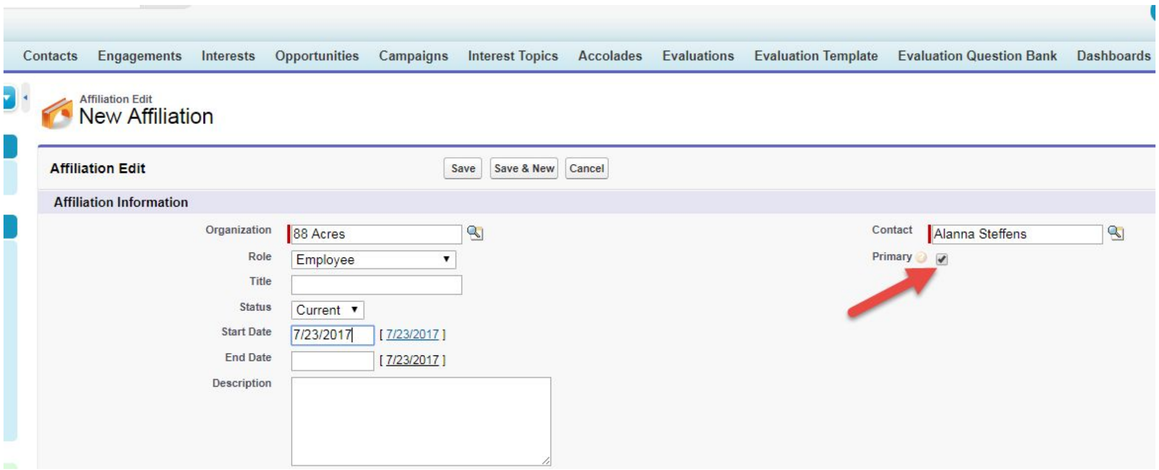


5. Select the magnifying glass beside Organization.
6. Type into the search bar 88 Acres. Press Go.
7. Click on the Account Name '88 Acres' and the lookup window will automatically close.



8. Select a role from the Role picklist field.
9. Provide a Start Date.

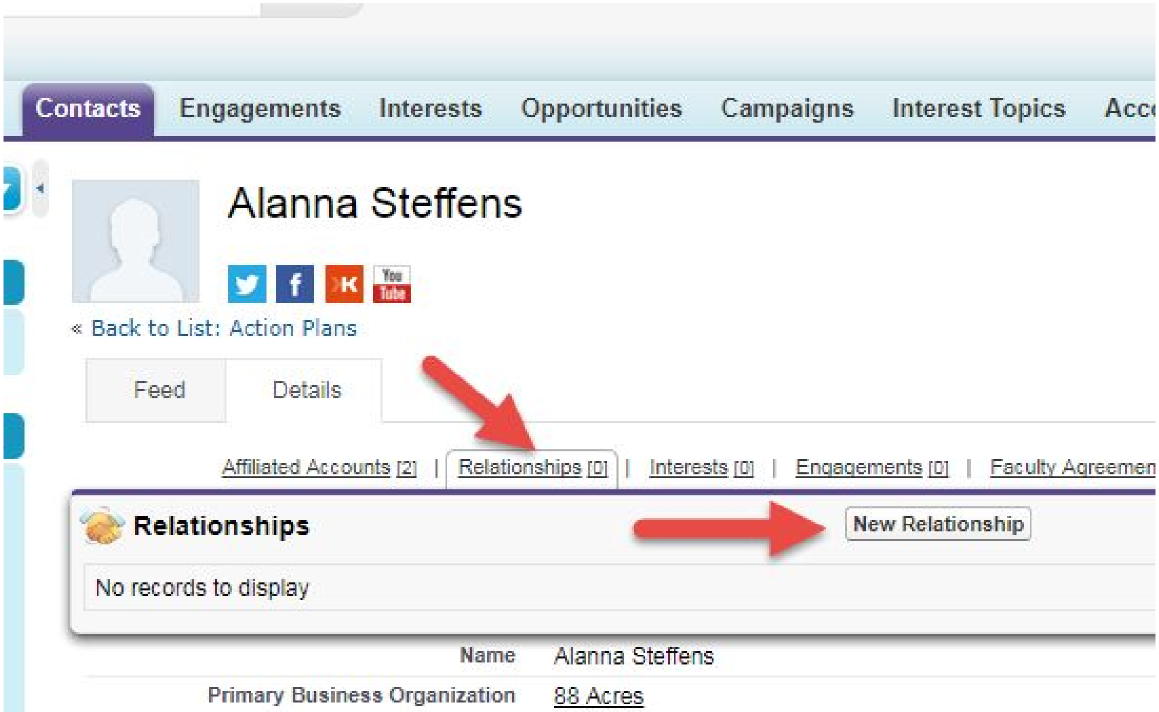
10. Click the Primary checkbox.
11. Enter in any additional comments (optional) in the description section 'This contact is an employee.'
12. Click Save.
13. The record just created now shows in the Affiliated Accounts related list on the contact record as well as the contact will show as affiliated on the 88 Acres account record. 88 Acres will also show on the Contact record as the Primary Business Organization for the contact.



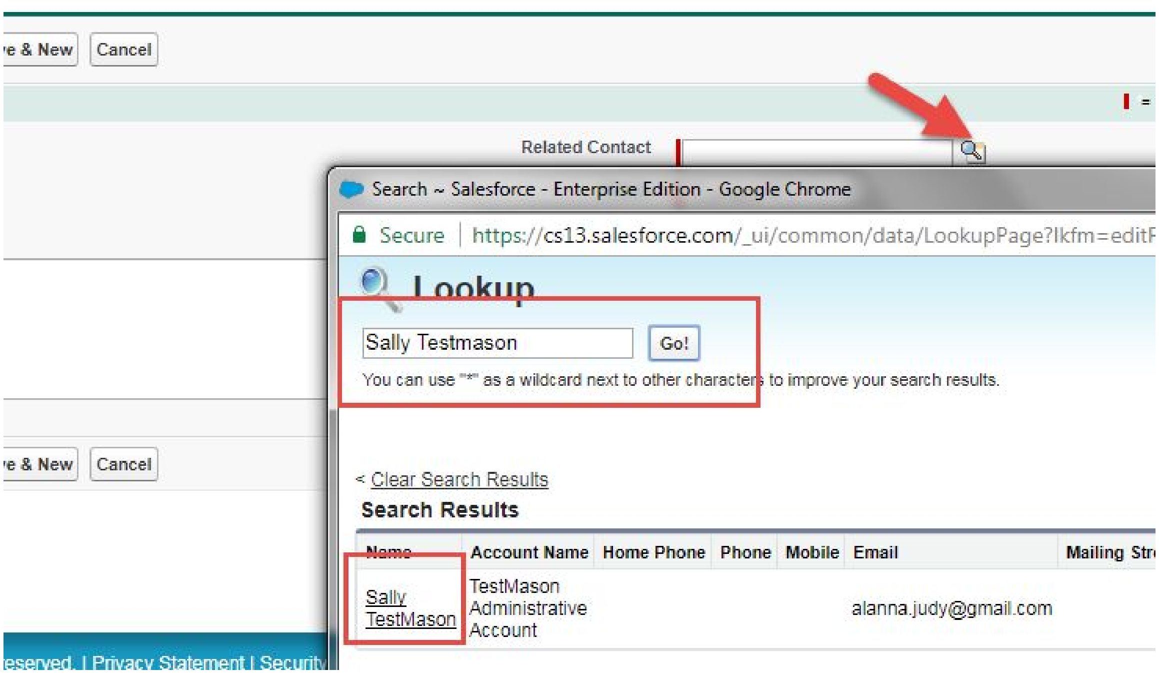
M. Hands On Exercise Scenario: Relationships - Relate a contact to another Contact

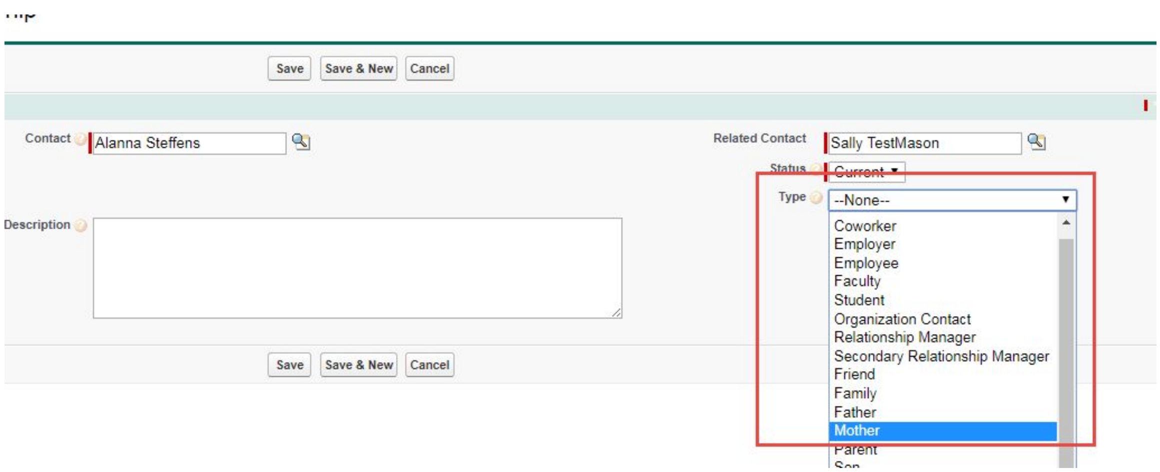
We determined that Sally TestMason is your test contact's parent. We'd like to show a relationship between two contacts.

1. Go to you test contacts record (<First Name> Test Contact).
2. Navigate to the Relationships related list. Click the 'New Relationship' button.



3. Select the magnifying glass beside the 'Related Contact' field.
4. Search for 'Sally Testmason' to relate to in the Related Contact lookup field and use the Type dropdown to identify this relationship as Mother or Parent.

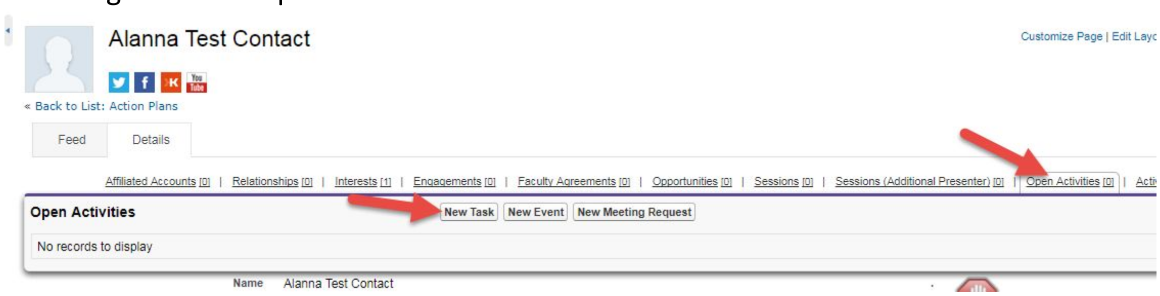




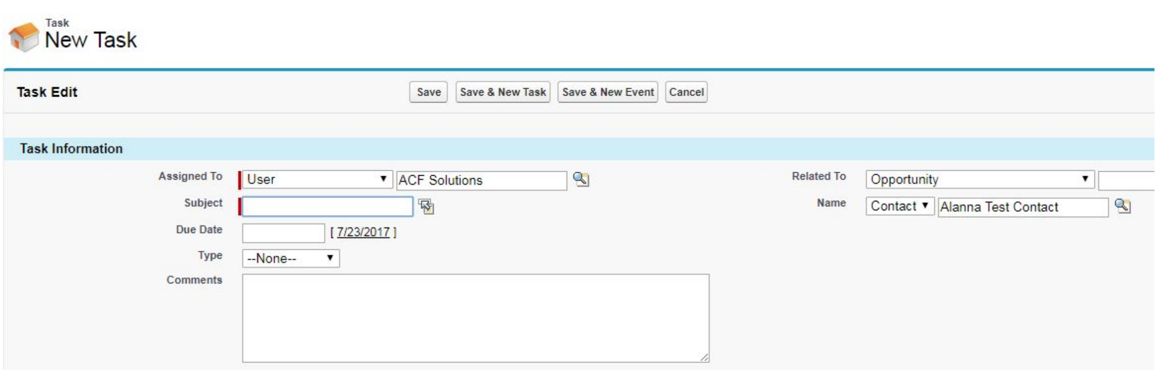
5. Click Save.
6. The record just created now shows in the Relationships related list on both of contacts records.

N. Hands On Exercise Scenario: Create an Activity record

1. Go to the test contact you've just created.
2. Navigate to the Open Activities related list and click the 'New Task' button.



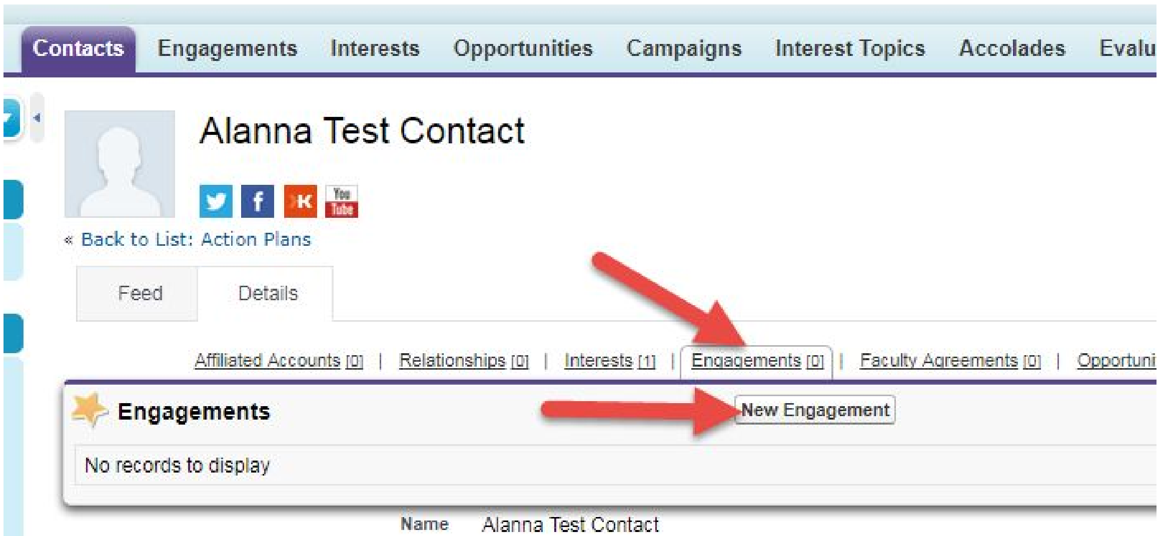
3. Fill out the required information and click 'Save'.



*Refer to the Activities and Emails quick reference guide for additional information.

O. Hands-On Scenario Exercise: Creating an Engagement Record

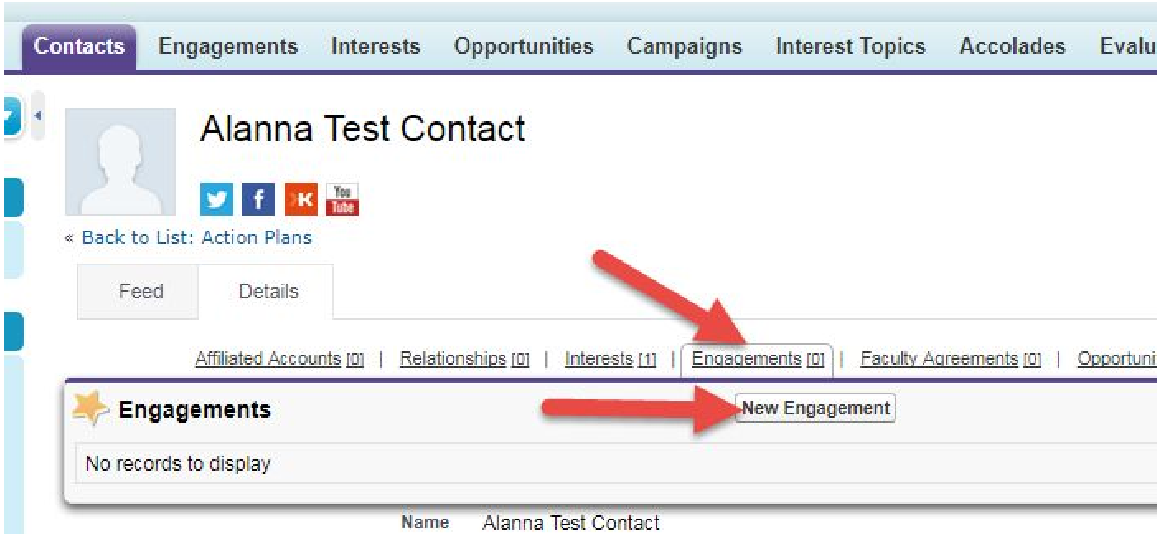
1. Navigate to the test contact you've just created.
2. Navigate to the Engagements related list. Click New Engagement.



3. Select the record type 'Engagement'. Click Continue.
4. Fill out the desired fields. Be sure to select an engagement type. These records are meant to identify meaningful activities that should be highlighted in one place such as award recipients, speakers, event hosts, panelists, moderators, etc.
5. Click Save.

P. Hands-On Scenario Exercise: Creating a Prospective Engagement Record

1. Navigate to the test contact you've just created.
2. Navigate to the Engagements related list. Click New Engagement.



3. Select the record type 'Prospective Engagement'. Click Continue.
4. Fill out the desired fields. Be sure to select an engagement type. These records are meant to identify prospective activities with an individual or company that Babson wishes to pursue.
5. Click Save.