Salesforce User Guide

Creating Records

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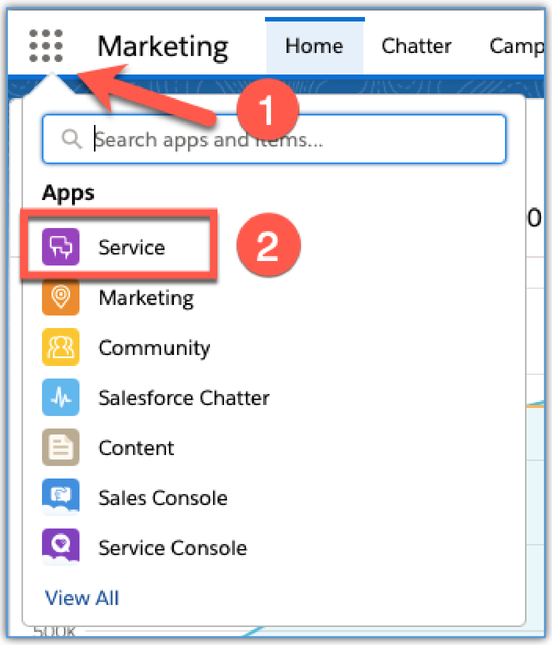
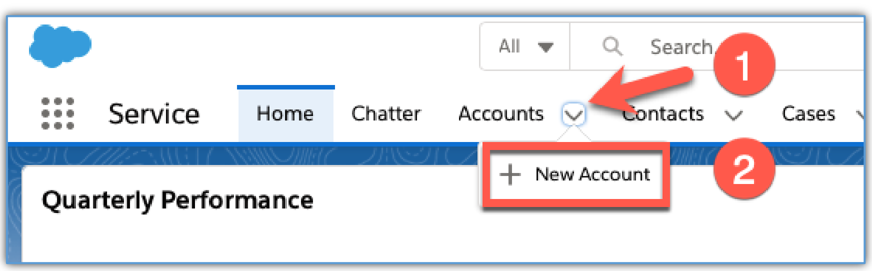
1 How to Create an Account

Accounts are for organizations, businesses, customers or other entities that interact with your product or business. Accounts can have multiple contacts, and every contact should be associated with an account.

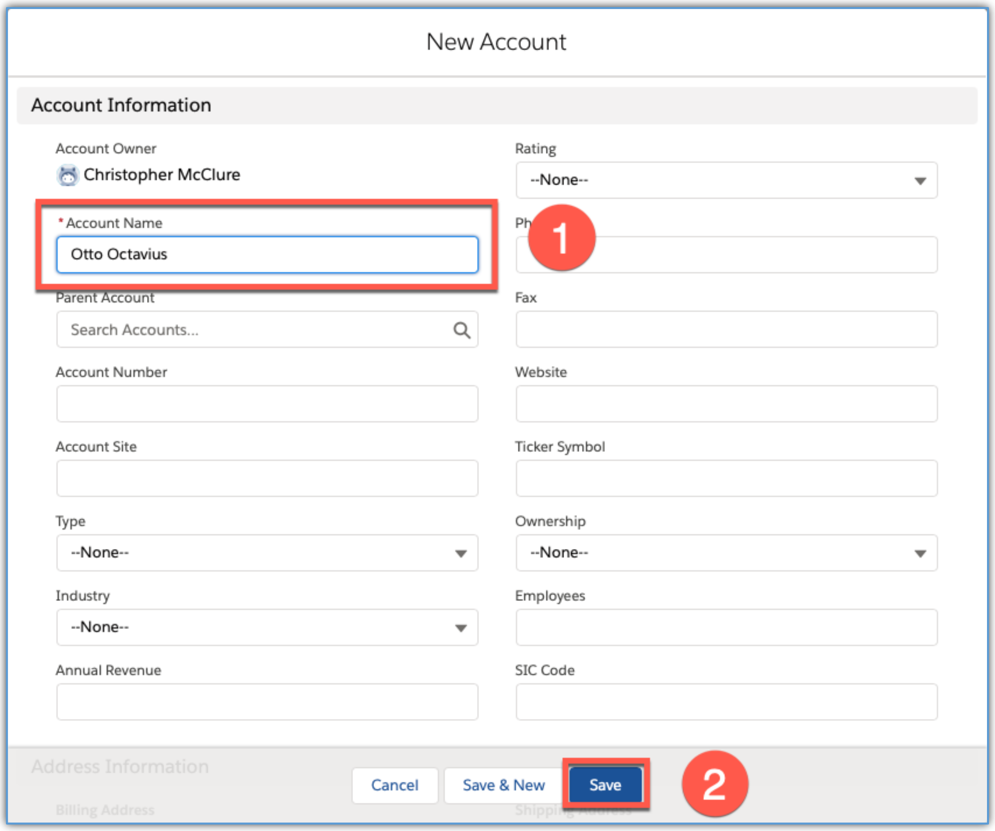
1. If you're not already in the Service app, click the App Launcher and then click **Service**.



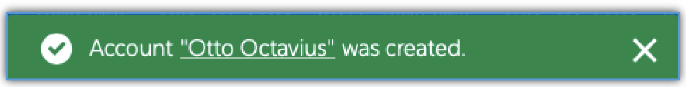
2. Once the **Service** app displays, click the down arrow next to **Accounts** (#1 below). Then click **New Account** to open a new account window.



3. Complete the required **Account Name** and other desired fields, then click **Save**.



4. The account page displays a green notification to confirm the new account.

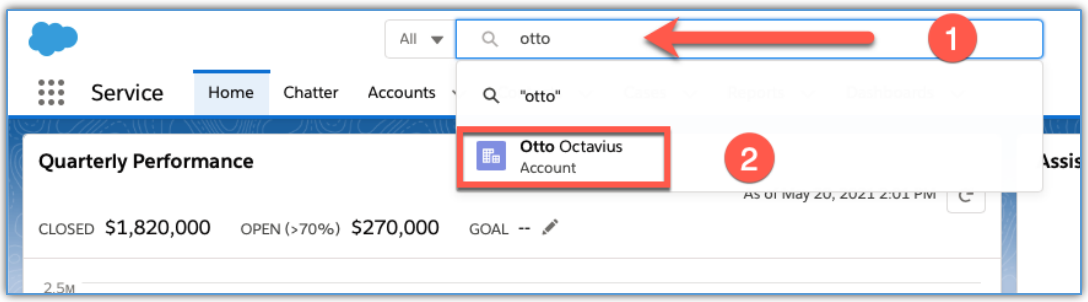


2 How to Create a Contact

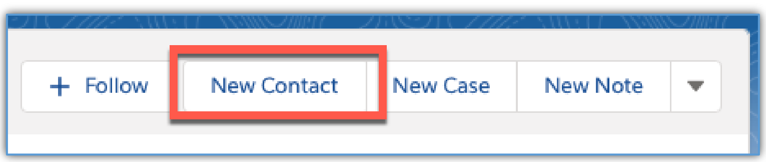
Contacts are individuals tracked in Salesforce. They best created from an account page, as contacts have a child relationship with accounts. If you don't know the contact's account yet, you can create the contact first and then associate it with an account later.

2.1 From the Account Page

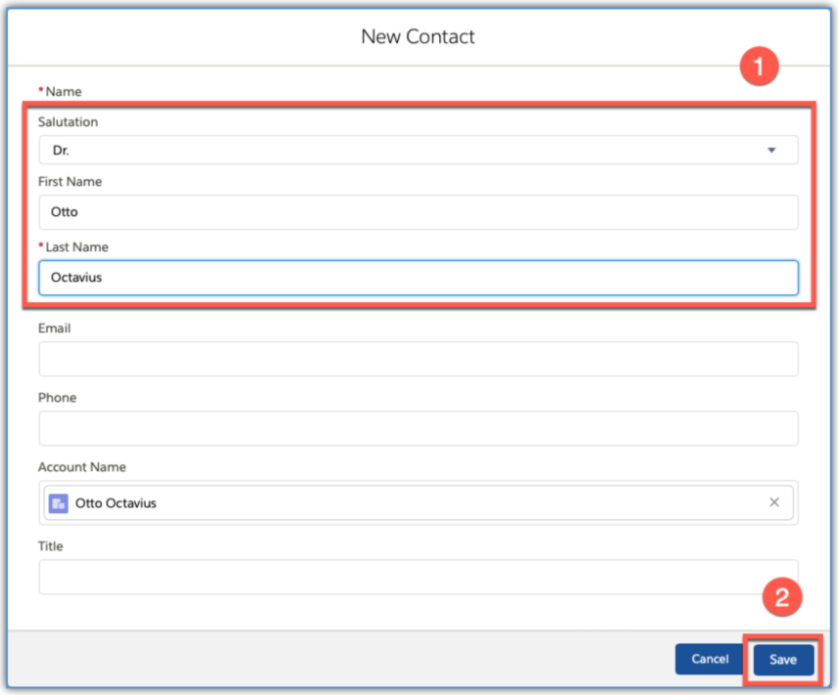
1. Search for the desired account in the search box, then click the account name. Be sure that the name you select lists "Account" below it.



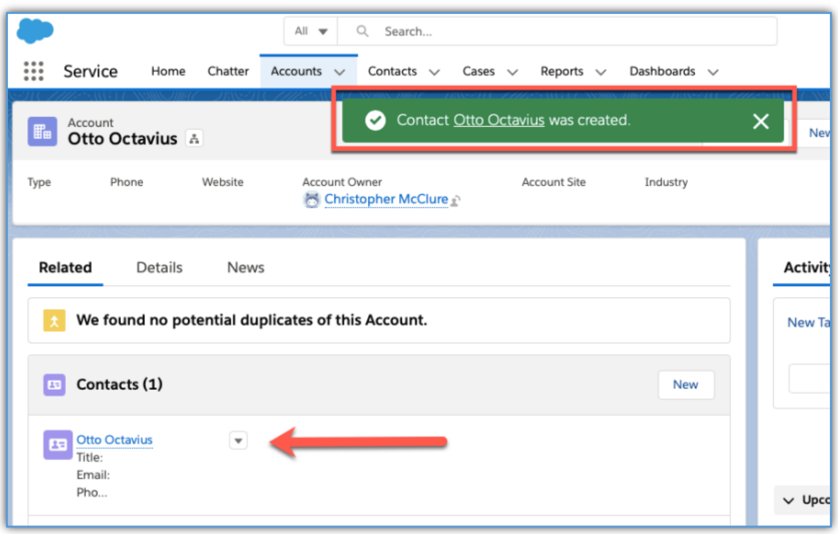
2. On the account page, click **New Contact** to open a new contact window.



3. Complete the required **Last Name** and any other desired fields. Click **Save** to create the new contact.

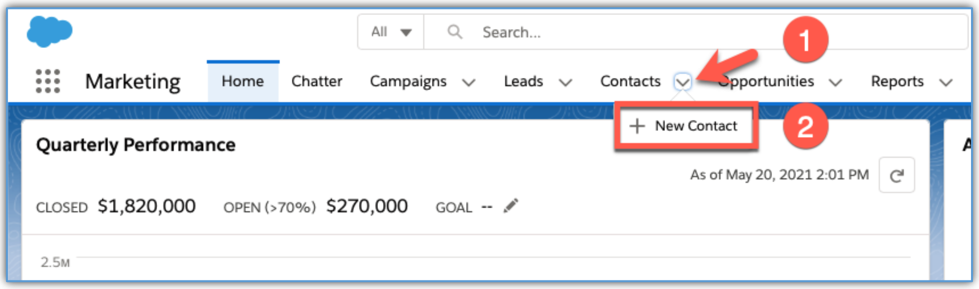


4. The account page displays with a green notification to confirm the new contact. The contact is listed below.

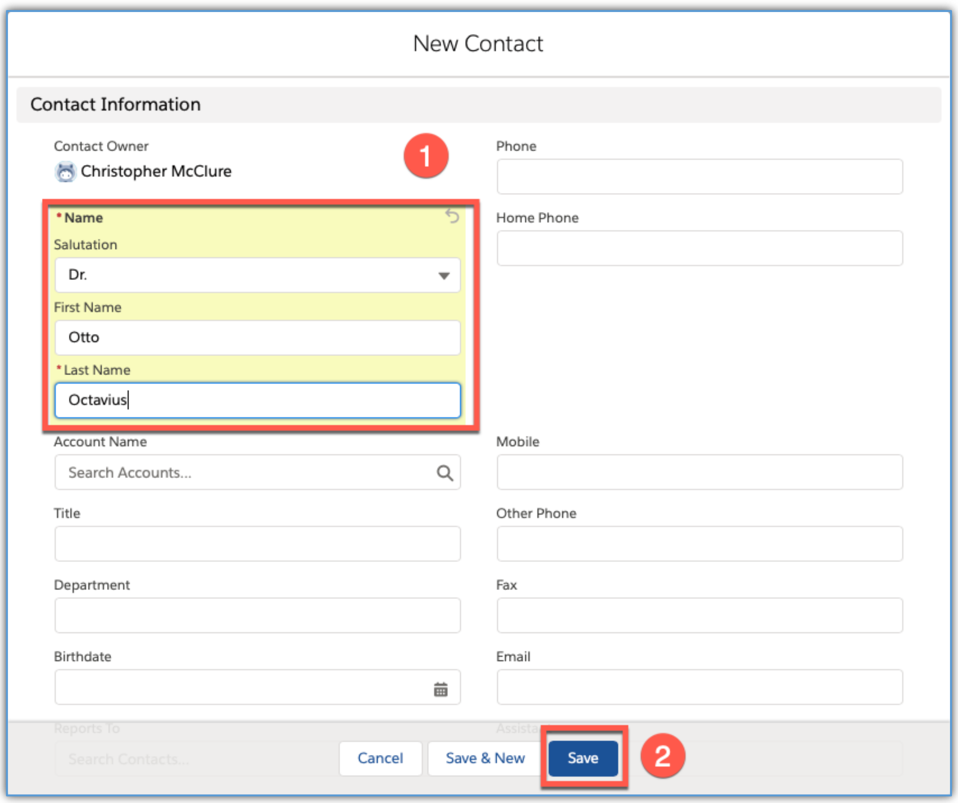


2.2 From the Contacts Tab

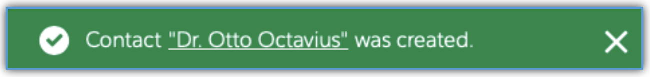
1. Click the down arrow next to the **Contacts** tab (#1 below), then click **New Contact** to open a new contact window.



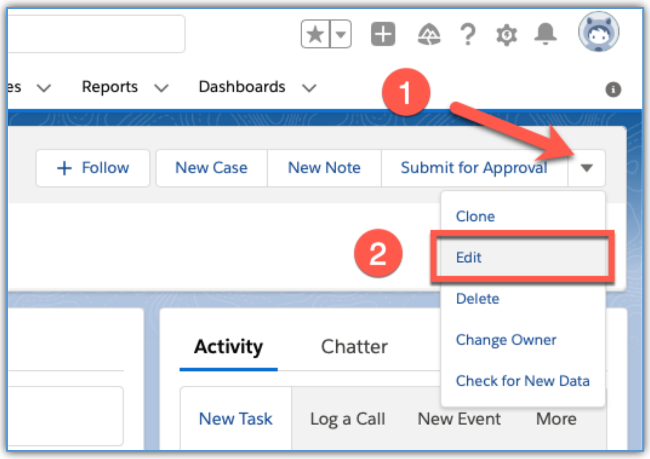
2. Complete the required **Last Name** and any other desired fields. Click **Save** to create the new contact.



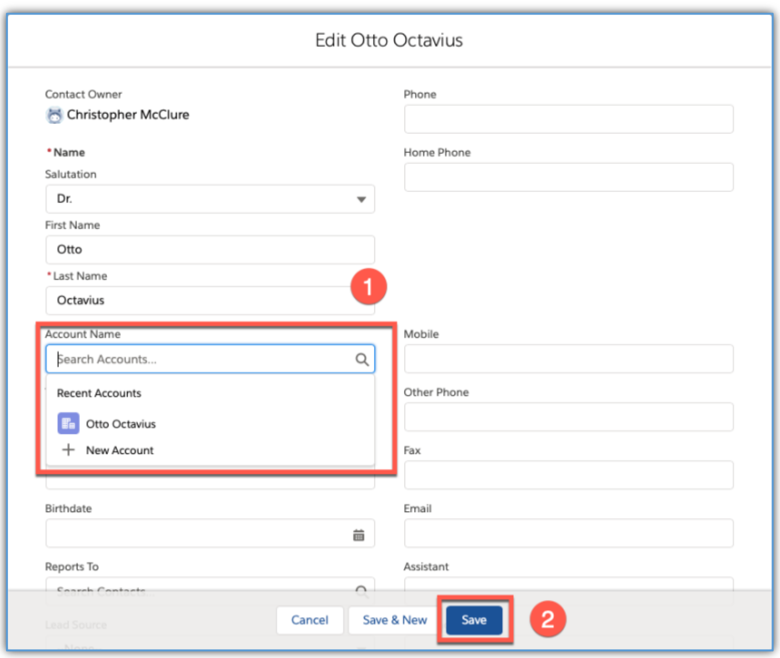
3. The contact page displays a green notification to confirm the new contact.



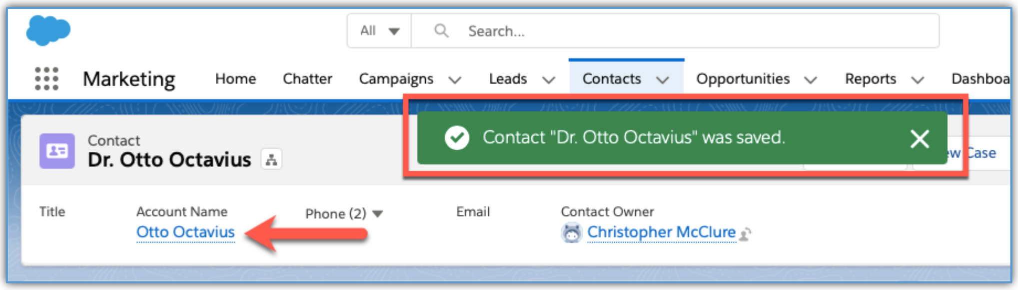
4. To associate this contact with an account, click the down arrow in the contact menu (#1 below), then click **Edit**.



5. Type the account name in the **Account Name** field. Select the name from the drop down or click **New Account**. Once the account is selected, click **Save**.



6. The contact page displays a green notification to confirm the contact was edited. The account is listed below the contact.

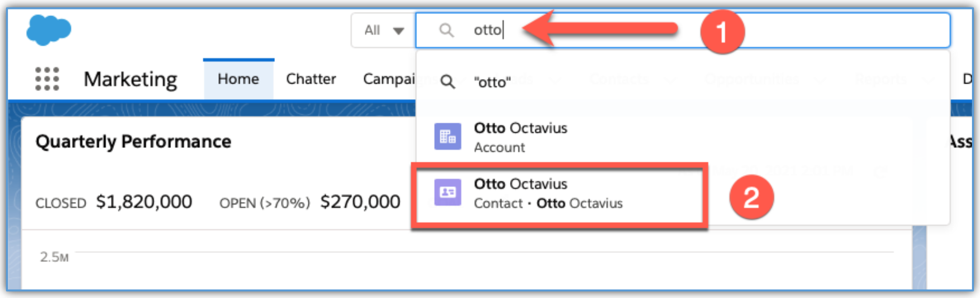


3 How to Create a Case

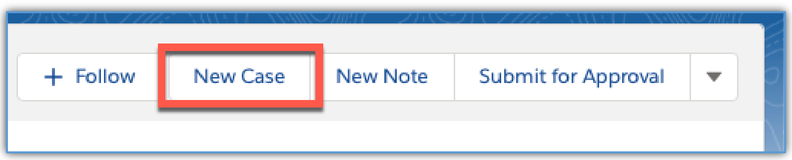
Cases are for questions, issues, or feedback from customers. They are most easily created from a contact or account page. Cases can also be created and associated with a contact later.

3.1 From a Contact or Account Page

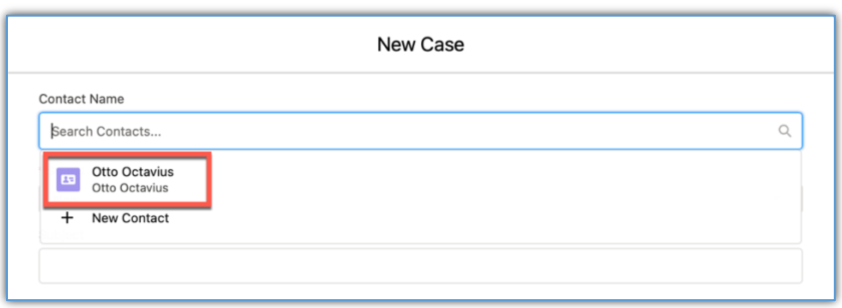
1. Search for the desired contact or account in the search box, then click the record.



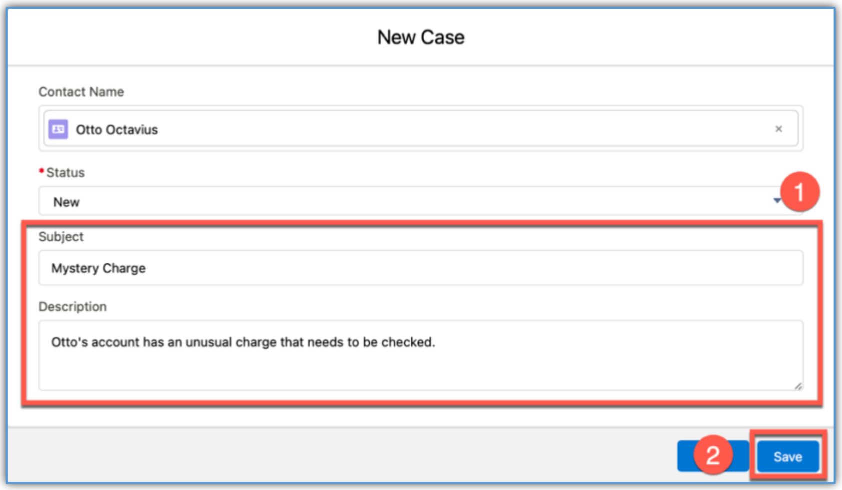
2. On the contact or account page click **New Case**.



3. The contact should be in the dropdown in the new case window. Either select the contact or search for the desired contact in the **Contact Name** field.



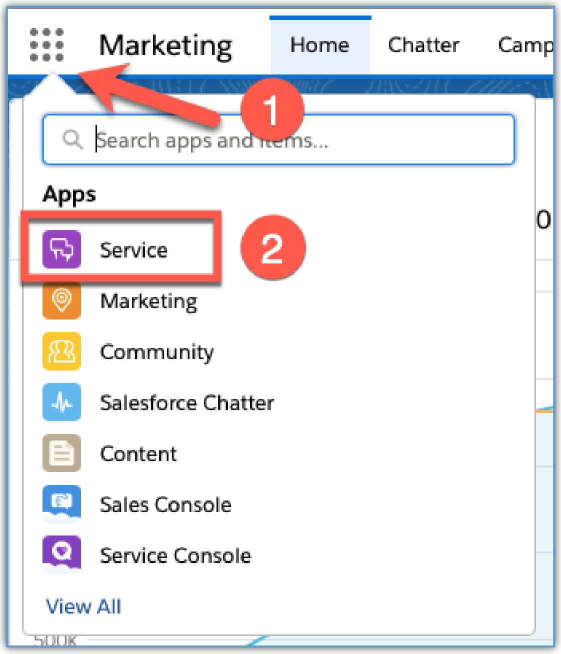
4. Complete the **Subject** and **Description** and update the status if desired. Click **Save**.



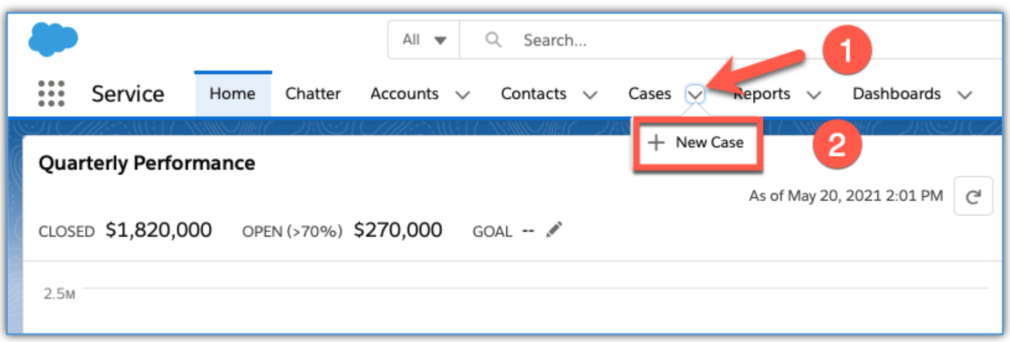
5. The contact or account page displays a green notification to confirm the new case.

3.2 From the Case Tab

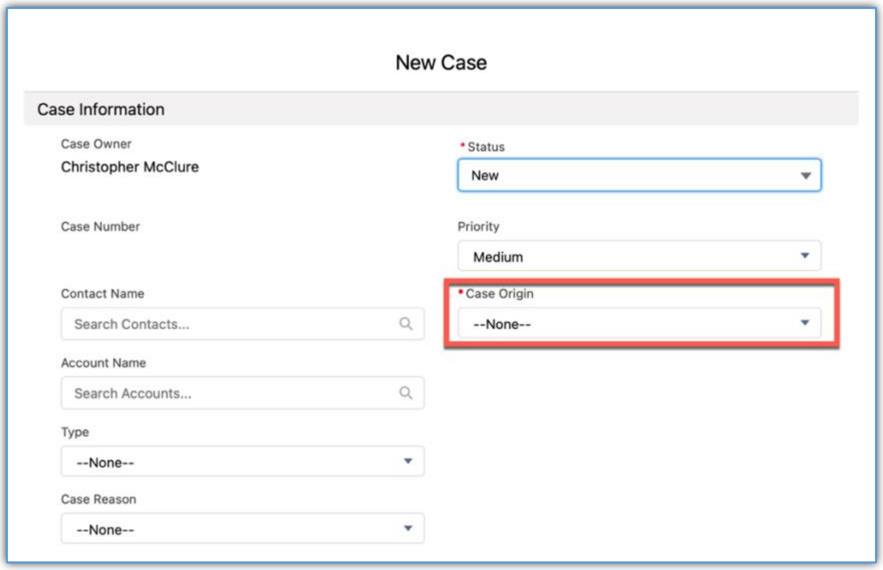
1. If you're not already in the Service App, click the App Launcher and then click **Service**.



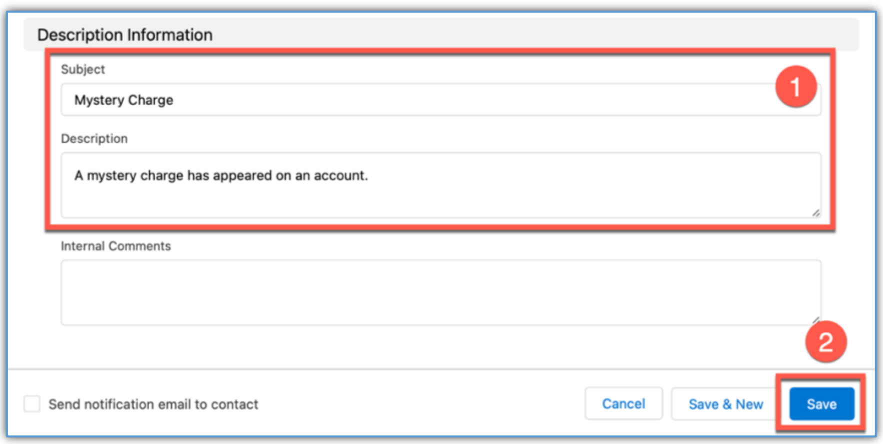
2. Once the Service App displays, click the down arrow next to **Cases**, then click **New Case**.



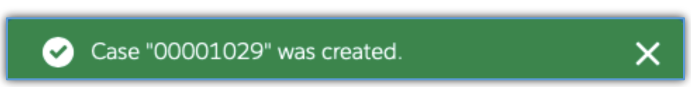
3. Click the **Case Origin** field and select the origin (required). Fill in any other desired fields.



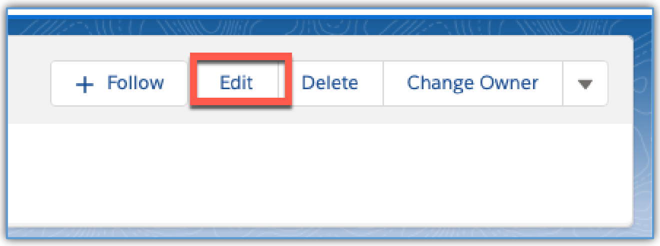
4. Scroll down and complete the **Subject** and **Description** fields, under "Description Information." Click **Save**.



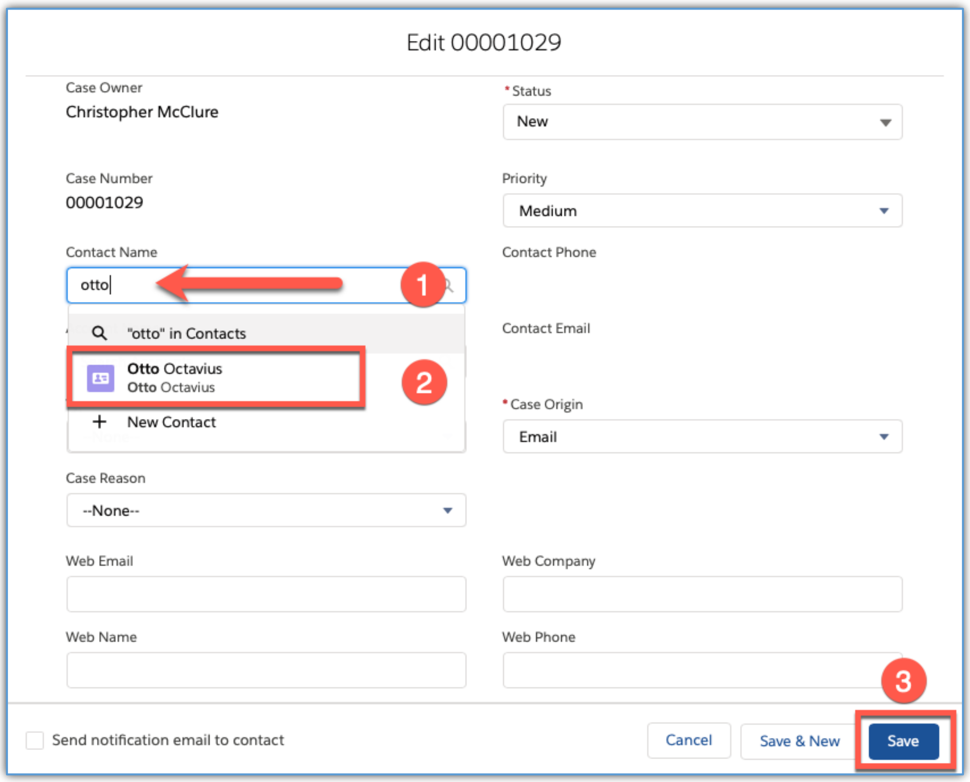
5. The case page displays a green notification to confirm the new case.



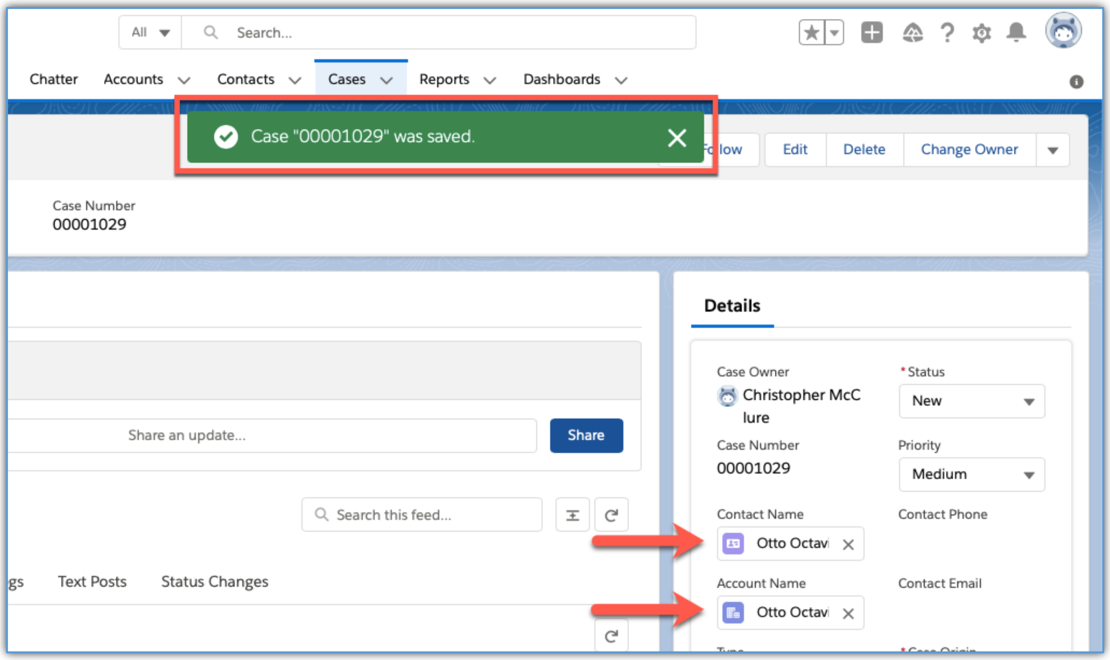
6. To associate the case with a contact, click **Edit** from the case page to open the edit window.



7. Click the **Contact Name** field and type in the desired contact. Select the contact from the dropdown, then click **Save**.



8. The case page displays a green notification to confirm saving the case. The contact and associated account are listed under “Details.”

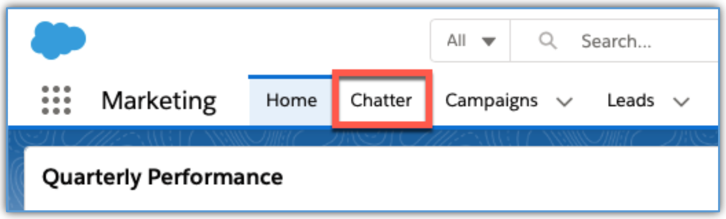


4 How to Create a Chatter Post

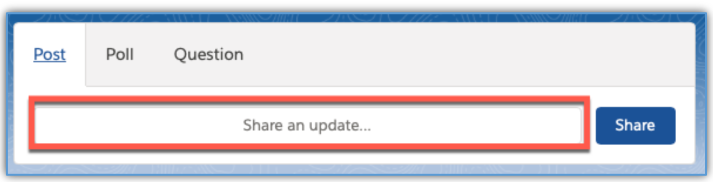
A Chatter post lets you communicate with other users, referencing specific records and users as needed. A post may be created from the Chatter tab, or from any contact, account, or case.

4.1 From the Chatter Tab

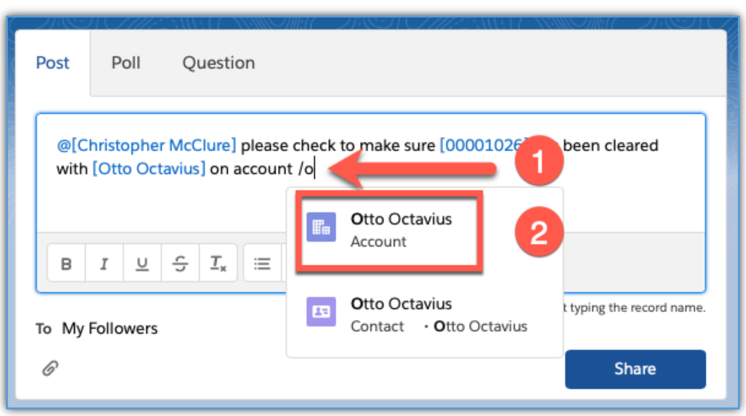
1. Click the **Chatter** tab.



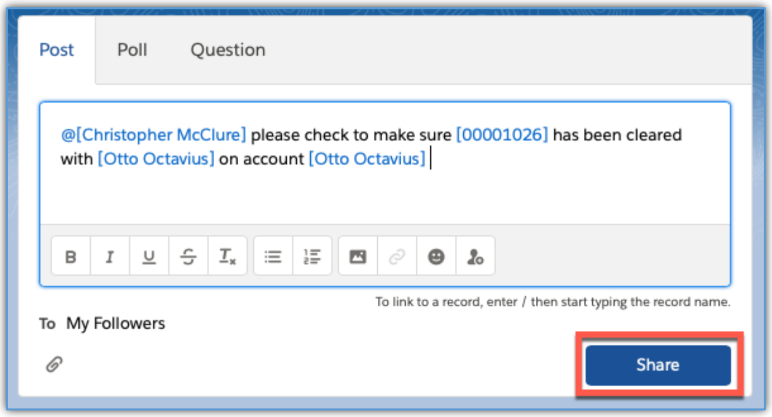
2. On the Chatter page displays, click the text box to write your post.



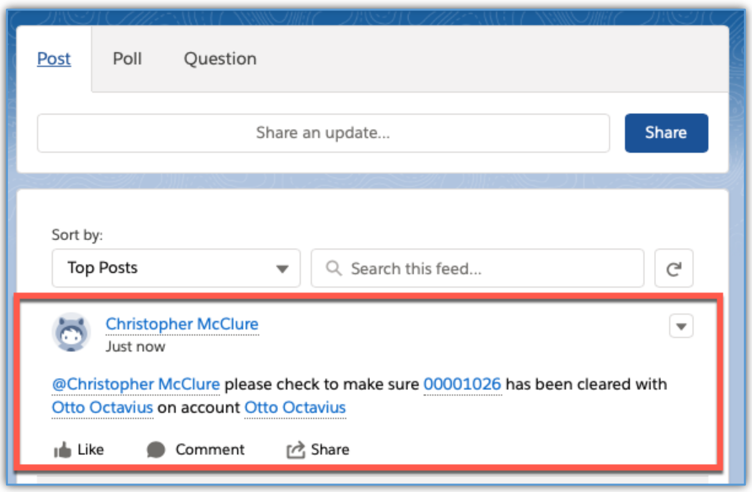
3. Use '@' to tag a user, or '/' to tag accounts, contacts, or cases. Select the user or record from the drop down.



4. Click **Share** to create your post.



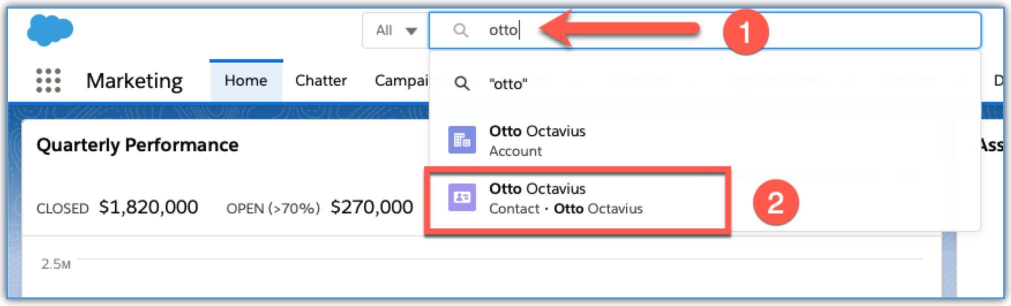
5. The post will display in the feed below.



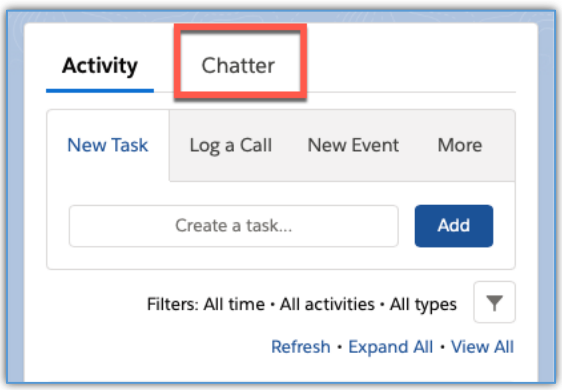
4.2 From a Contact

Although these instructions are for creating a Chatter post from a contact, creating a post from any other record (accounts, cases, opportunities, etc.) will follow the same basic process.

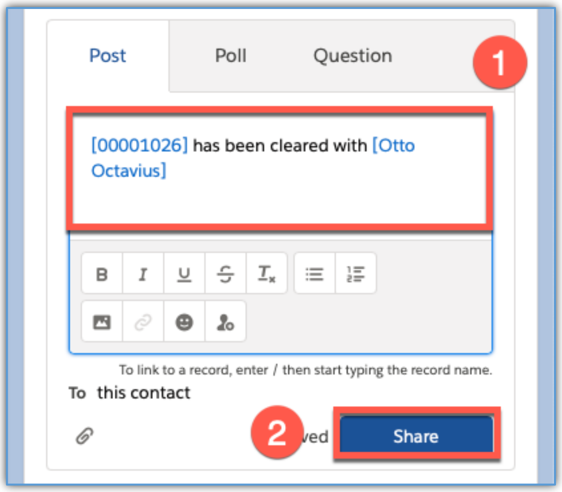
1. Search for the desired contact in the search box. Select the contact.



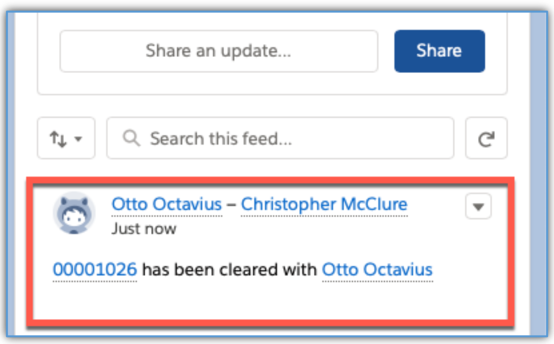
2. On the contact page, click the **Chatter** tab.



3. Type your post in the text box. Use '@' to tag users and '/' to tag accounts, contacts, and cases (see 4.1, step 3 above). Click **Share**.



4. The post will display in the feed below.

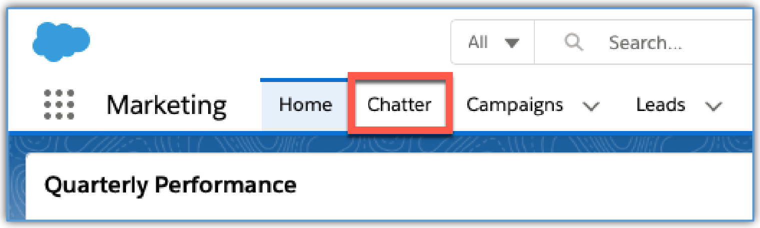


5 How to Create a Chatter Poll

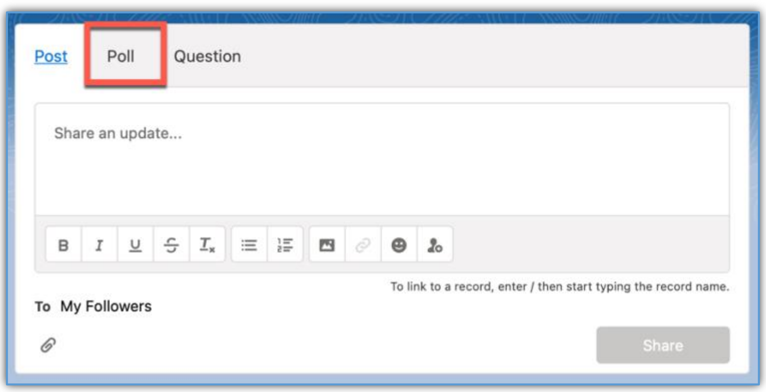
A Chatter poll allows you to create a poll that other users can vote in. A poll may be created from the Chatter tab, or from any contact, account or case.

5.1 From the Chatter Tab

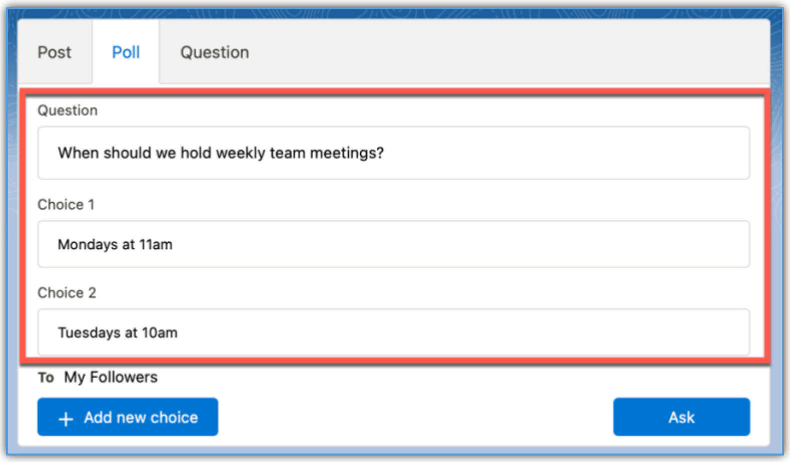
1. Click the **Chatter** tab.



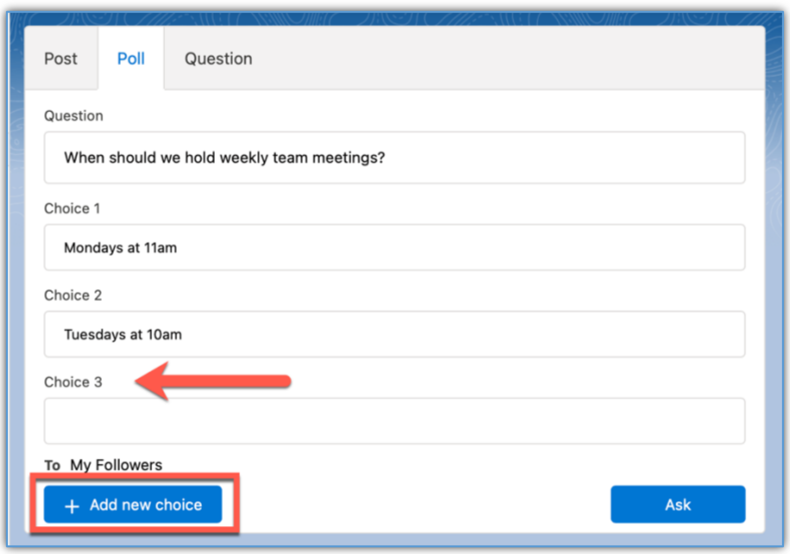
2. On the Chatter page, click on the **Poll** tab.



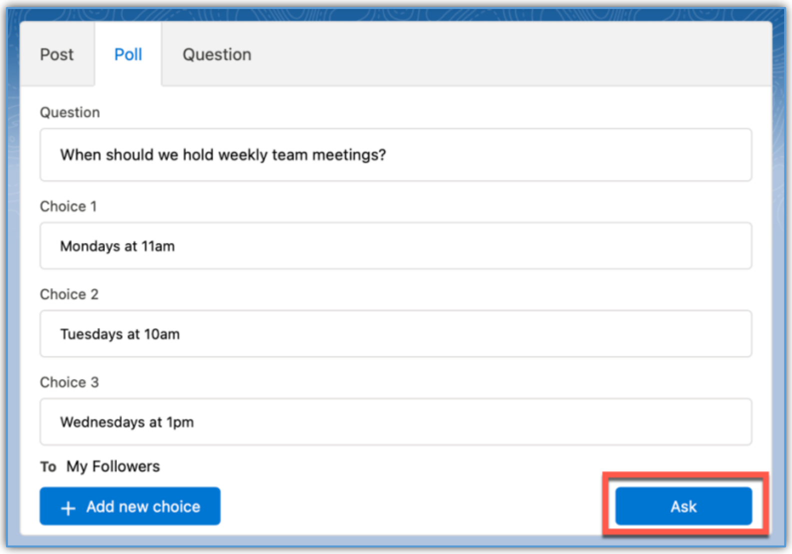
3. Complete the **Question** and **Choice** fields.



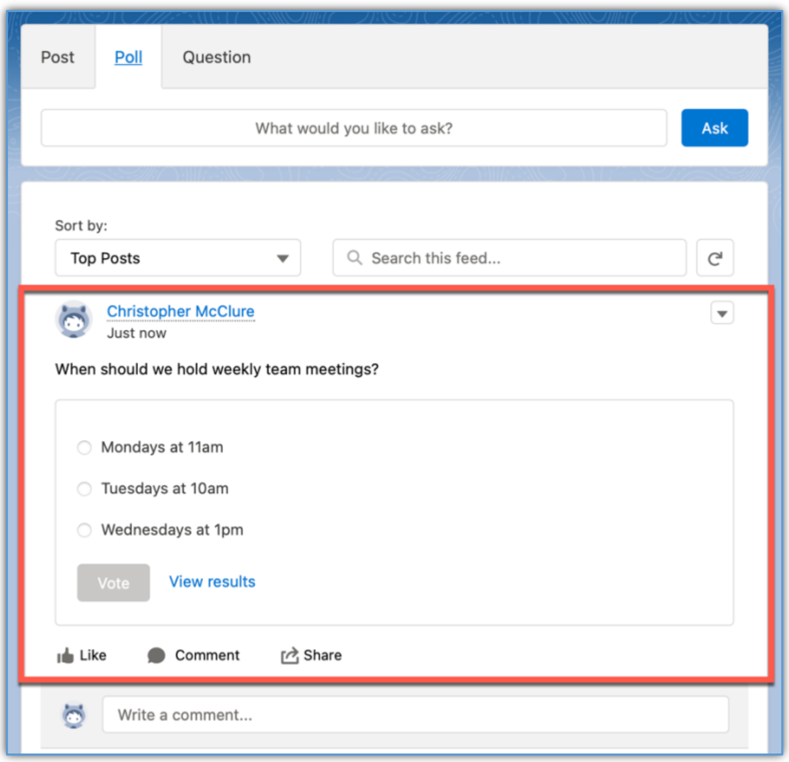
4. If needed, click **Add new choice** to add more **Choice** fields.



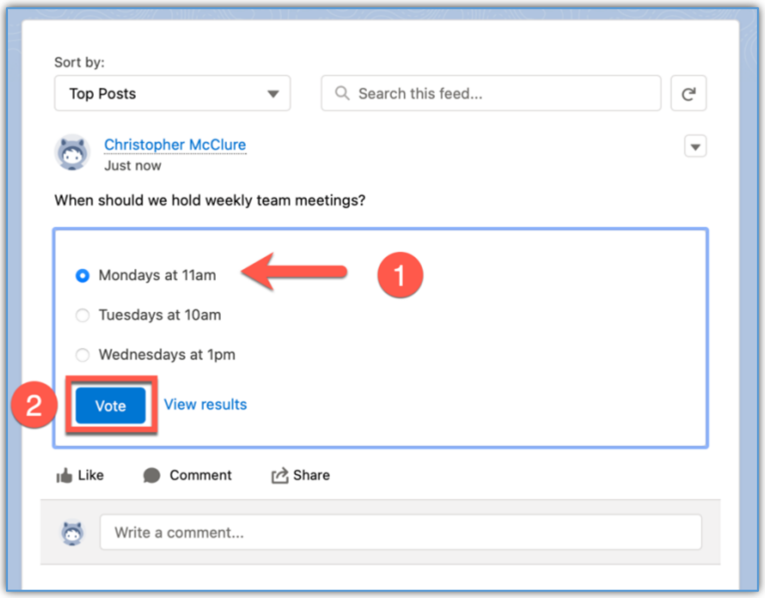
5. Click **Ask** to post the poll once the desired number of **Choice** fields are completed.



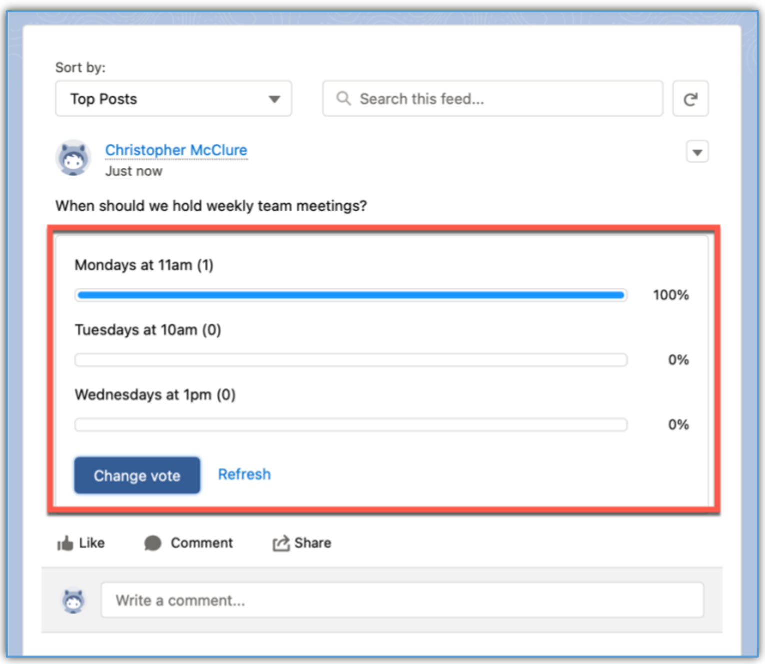
6. The poll will display in the feed below.



7. To vote in the poll, select an option and click **Vote**.



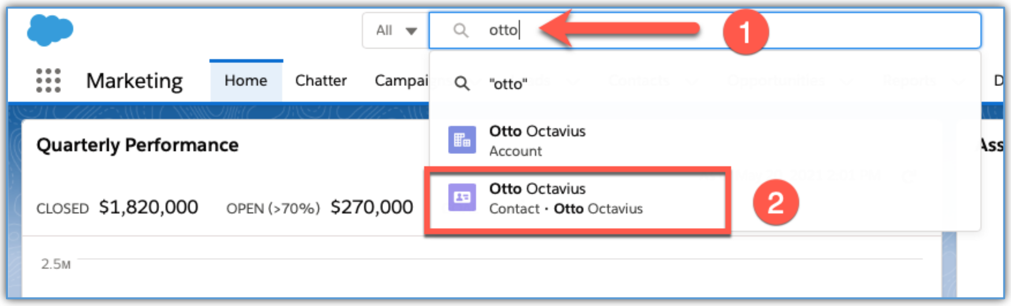
8. The results of the poll display to confirm your vote.



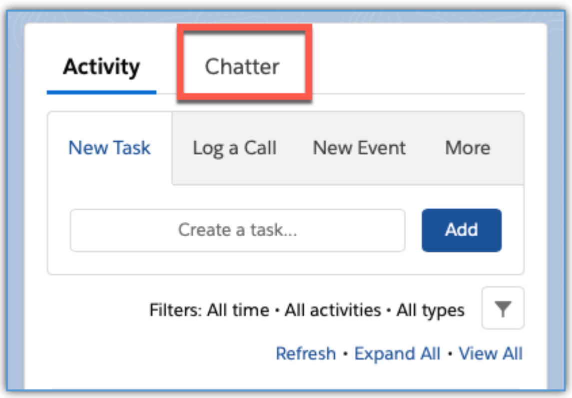
5.2 From a Contact

Although these instructions are for creating a Chatter poll from a contact, creating a poll from any other record (accounts, cases, opportunities, etc.) will follow the same basic process.

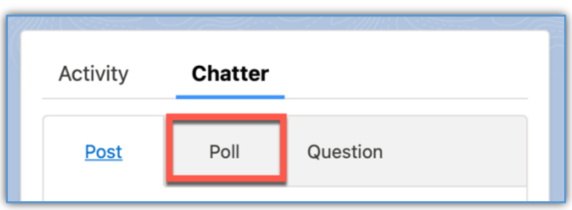
1. Search for the desired contact in the search box. Select the contact.



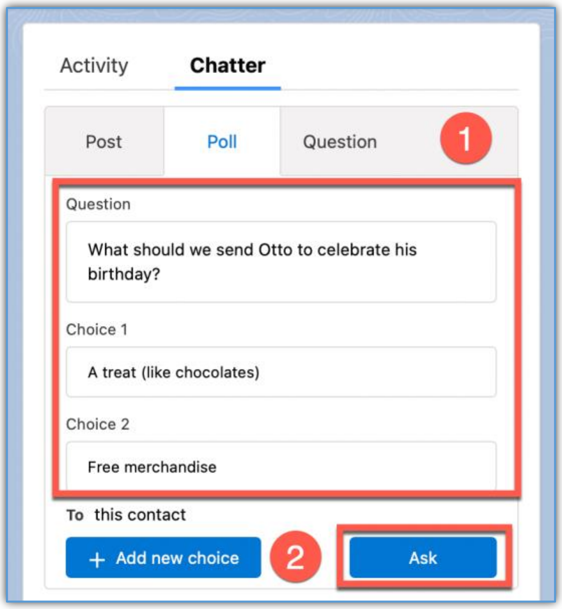
2. On the contact page, click the **Chatter** tab.



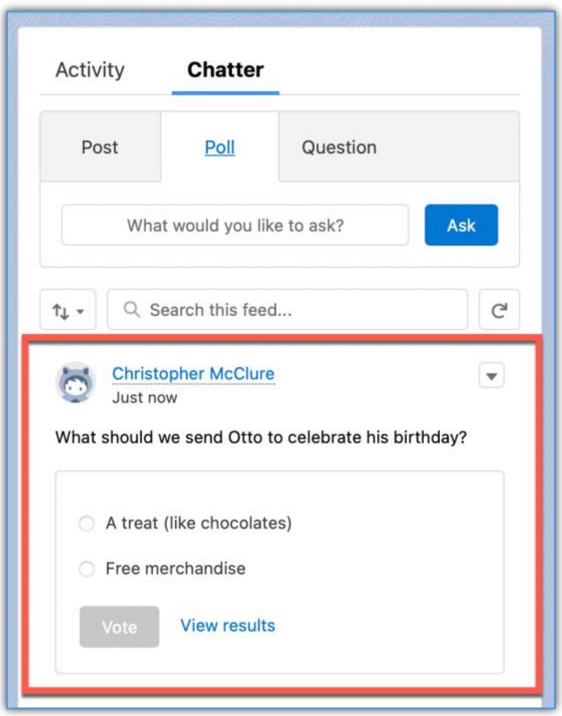
3. Click the **Poll** tab.



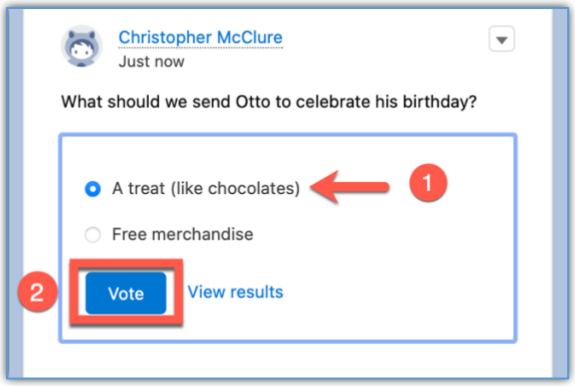
4. Complete the **Question** and **Choice** fields. If desired, add more options by clicking **Add new choice** (see 5.1, step 4 above). Click **Ask** to post the poll.



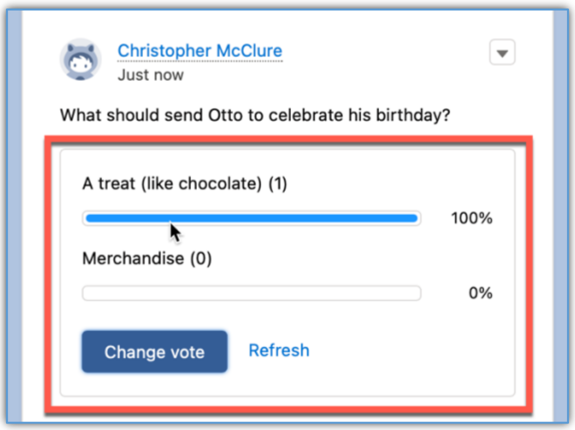
5. The poll will display below.



6. To vote in the poll, select an option then click **Vote**.



7. The poll results display to confirm your vote.

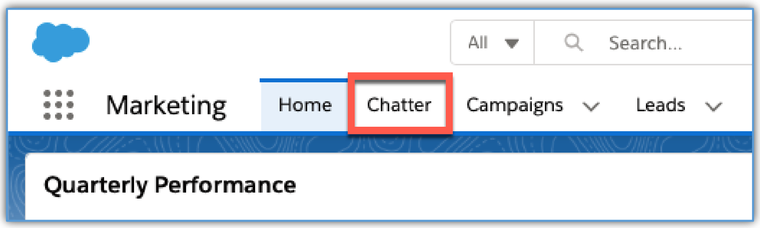


6 How to Create a Chatter Question

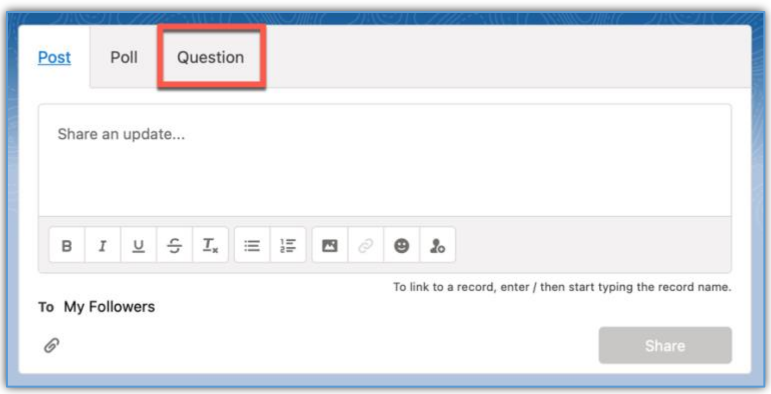
A Chatter question allows you to ask an open-ended question and get responses from other users. A question may be created from the Chatter tab, or from any contact, account or case.

6.1 From the Chatter Tab

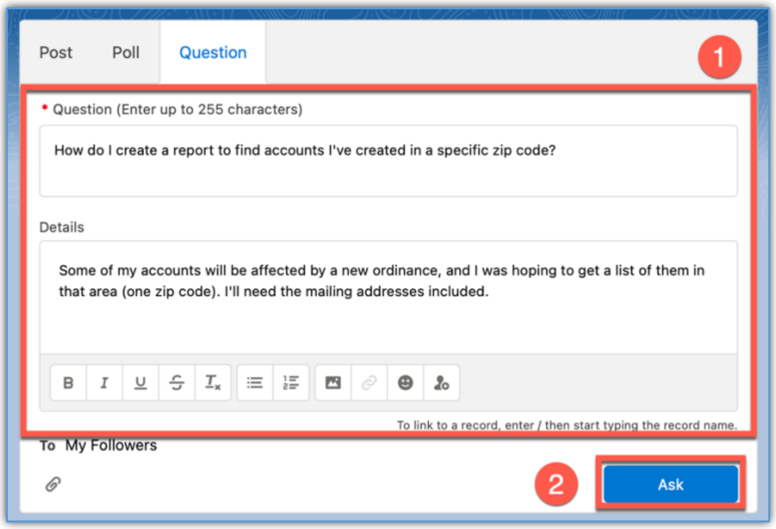
1. Click the **Chatter** tab.



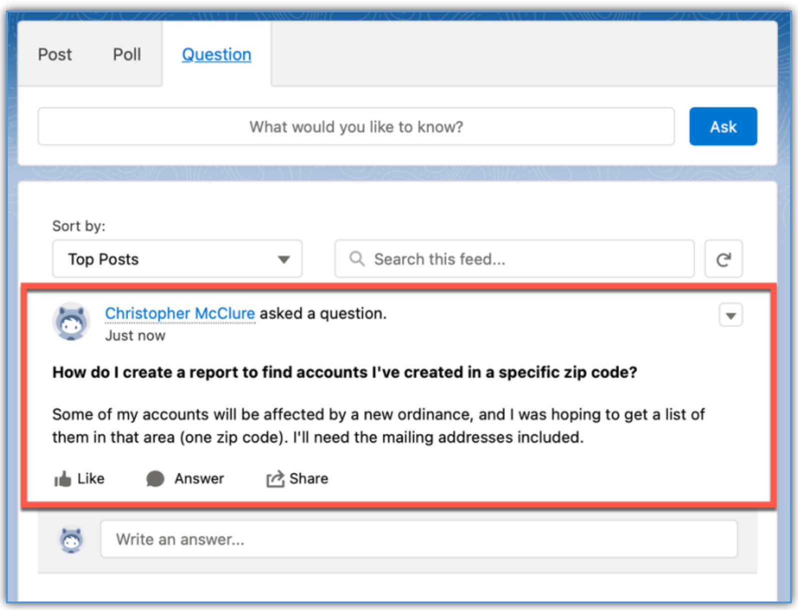
2. On the Chatter page, click on the **Question** tab.



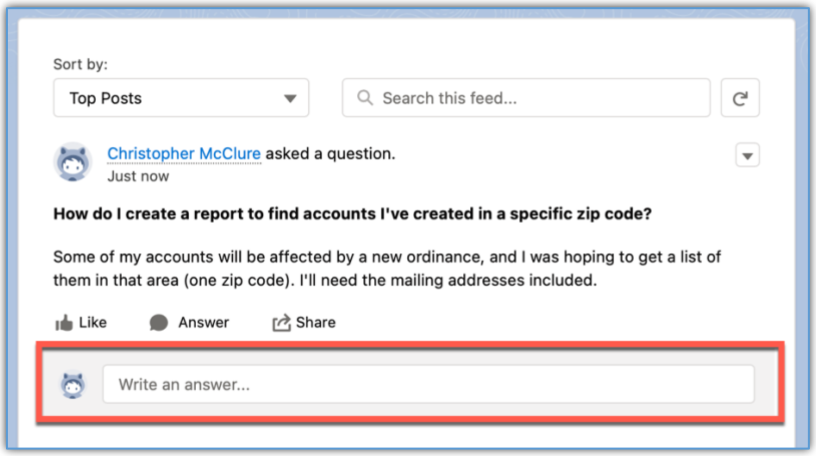
3. Complete the **Question** and the **Details** boxes, adding whatever details will be needed to answer the question. Then click **Ask** to post the question.



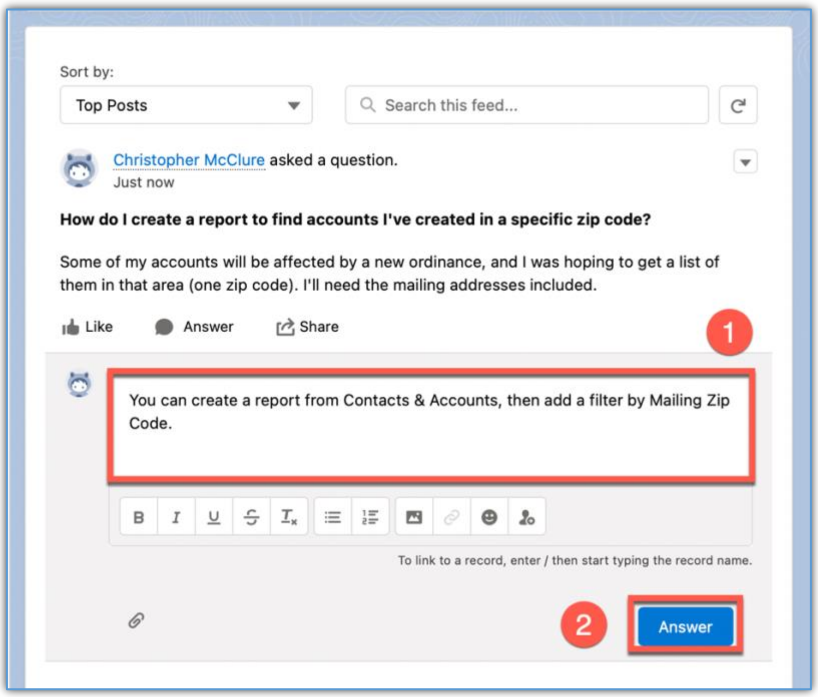
4. The question will display below.



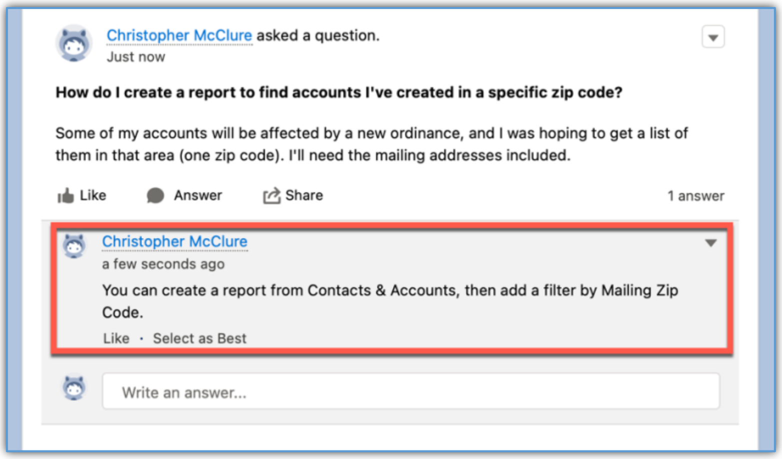
5. To answer a question, click the text box directly below the question.



6. Type your response, then click **Answer** to post your response.



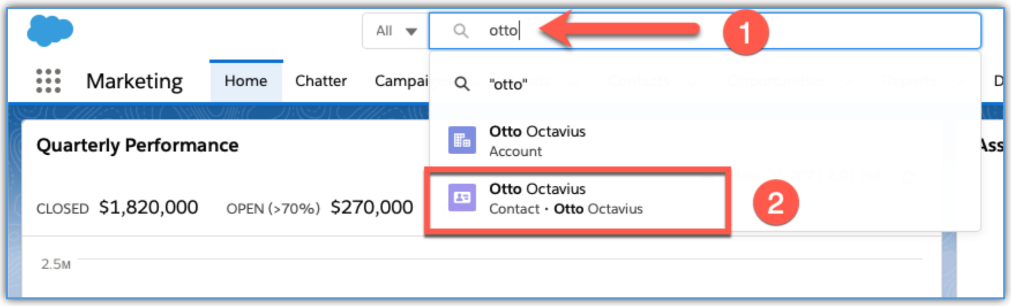
7. Your answer will display below the question.



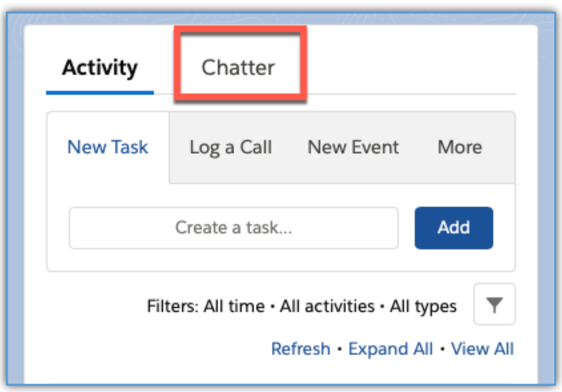
6.2 From a Contact

Although these instructions are for creating a Chatter question from a contact, creating a question from any other object instance (accounts, cases, opportunities, etc.) will follow the same basic process.

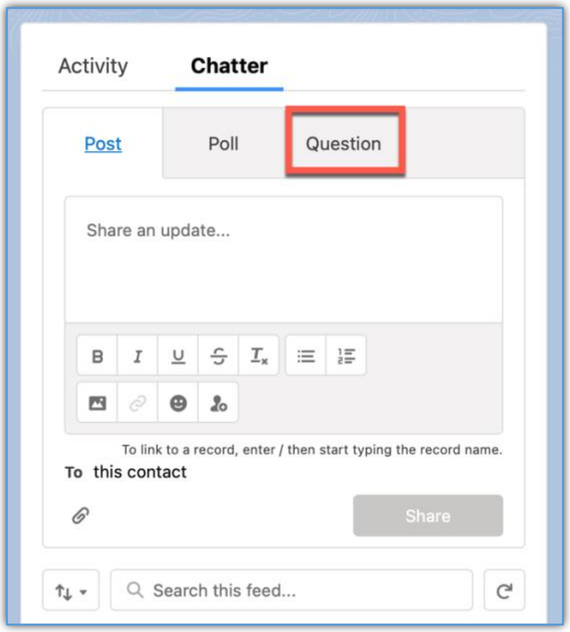
1. Search for the desired contact in the search box. Select the contact.



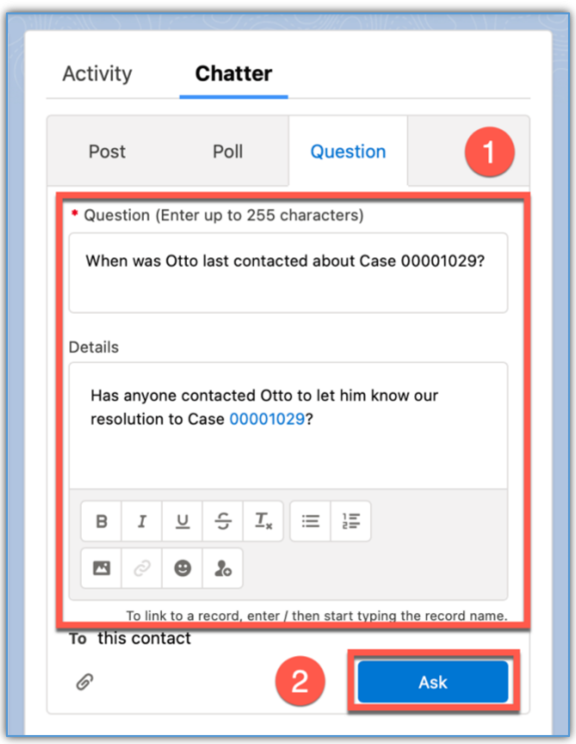
2. On the contact page, click the **Chatter** tab.



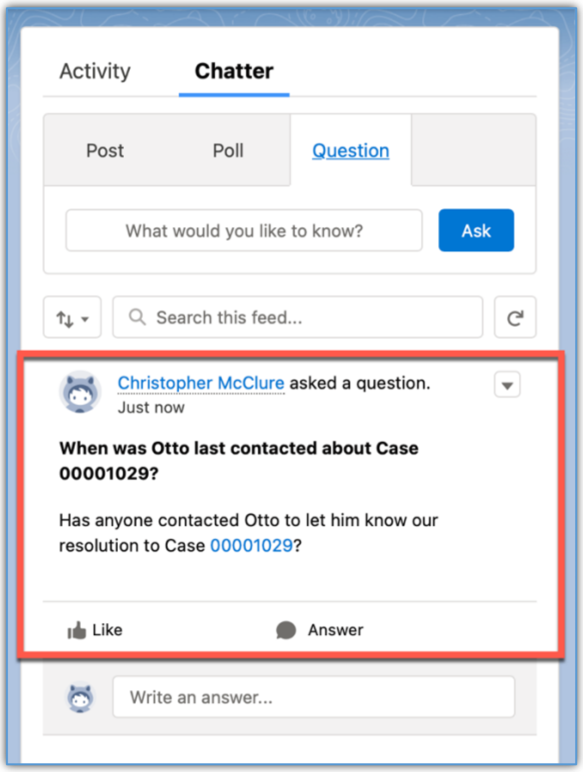
3. Click the **Question** tab.



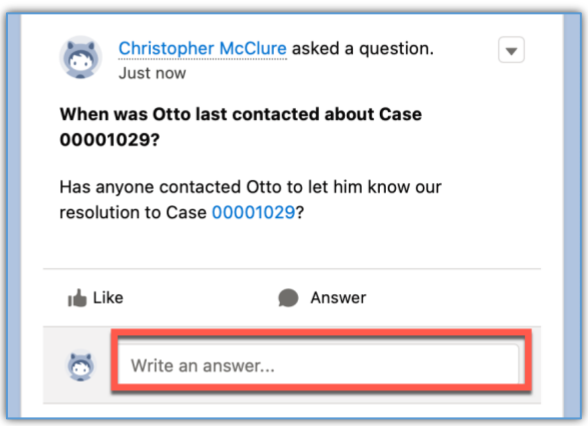
4. Complete the **Question** and **Details** boxes and then click **Ask** to post the question.



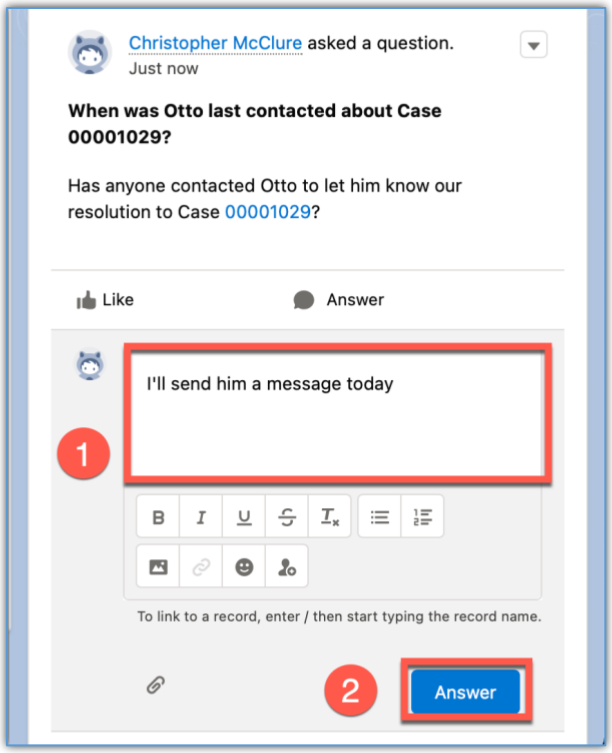
5. The question will display below.



6. To answer the question, click the text box directly below the question.



7. Complete the response, then click **Answer** to post the response.



8. The answer will display below.