



Salesforce User Guide

Creating Records

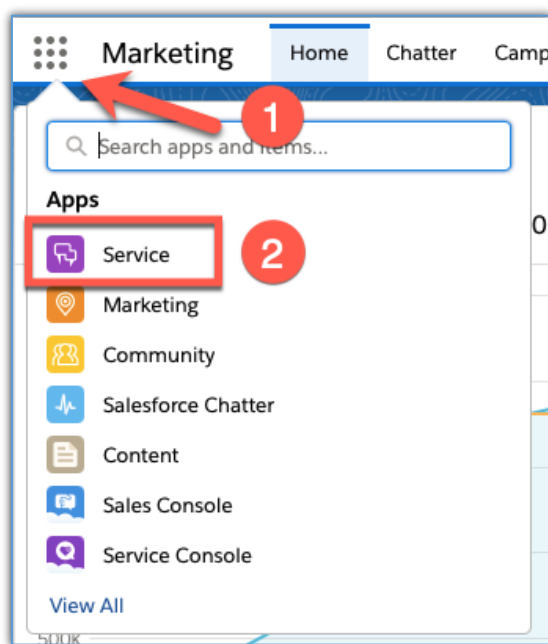
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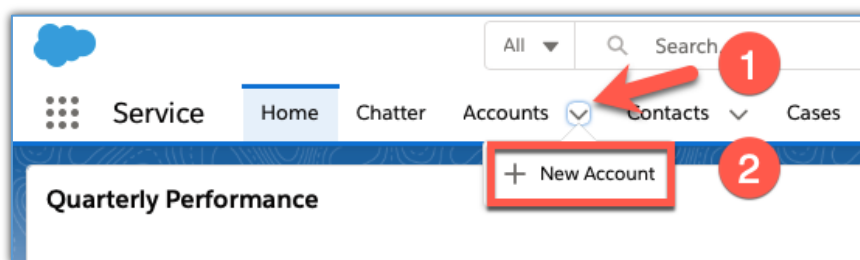
1 How to Create an Account

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**.



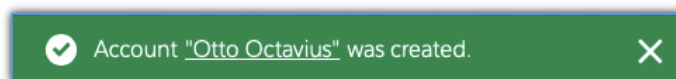
2. Once the **Service** app displays, click the down arrow next to **Accounts** (#1 below). Then click **New Account** to open a new account window.



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

The screenshot shows the 'New Account' form in Salesforce. The form is titled 'New Account' and contains several sections. The 'Account Information' section is the primary focus. It includes fields for 'Account Owner' (Christopher McClure), 'Rating' (dropdown menu), 'Account Name' (text field, highlighted with a red box and a red circle with the number '1'), 'Parent Account' (search field), 'Account Number' (text field), 'Account Site' (text field), 'Type' (dropdown menu), 'Industry' (dropdown menu), 'Annual Revenue' (text field), 'Phone' (text field), 'Fax' (text field), 'Website' (text field), 'Ticker Symbol' (text field), 'Ownership' (dropdown menu), 'Employees' (text field), and 'SIC Code' (text field). The 'Save' button is located at the bottom right of the form, highlighted with a red box and a red circle with the number '2'. The 'Cancel' and 'Save & New' buttons are also visible.

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

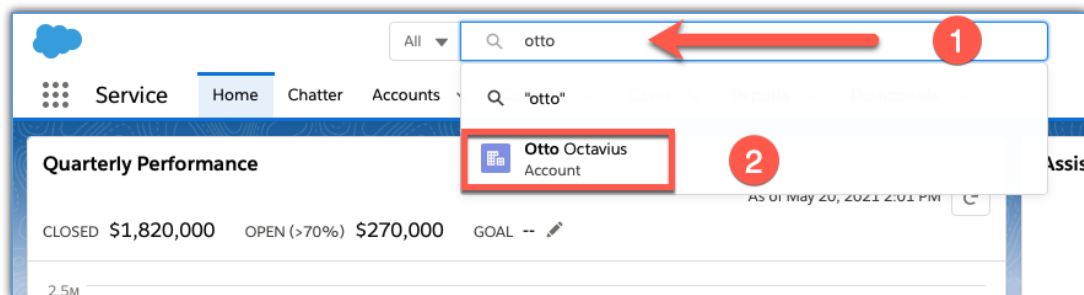


2 How to Create a Contact

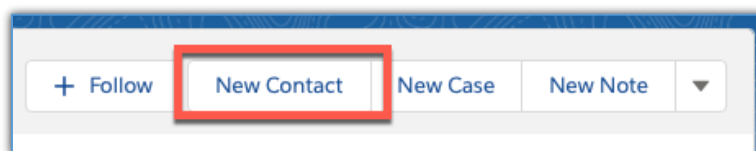
Contacts are individuals tracked in Salesforce. They best created from an account page, as contacts have a child relationship with accounts. If you don't know the contact's account yet, you can create the contact first and then associate it with an account later.

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.

New Contact

*Name

Salutation
Dr.

First Name
Otto

*Last Name
Octavius

Email

Phone

Account Name
Otto Octavius

Title

Cancel Save

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

Service Home Chatter Accounts Contacts Cases Reports Dashboards

Account Otto Octavius

Type Phone Website Account Owner Christopher McClure Account Site Industry

Related Details News

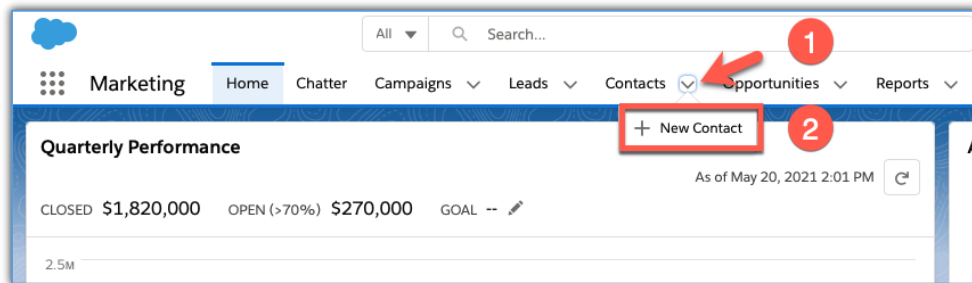
We found no potential duplicates of this Account.

Contacts (1) New

Otto Octavius
Title:
Email:
Pho...

2.2 From the Contacts Tab

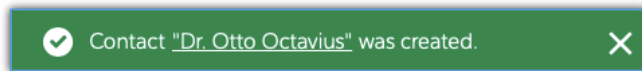
1. Click the down arrow next to the **Contacts** tab (#1 below), then click **New Contact** to open a new contact window.



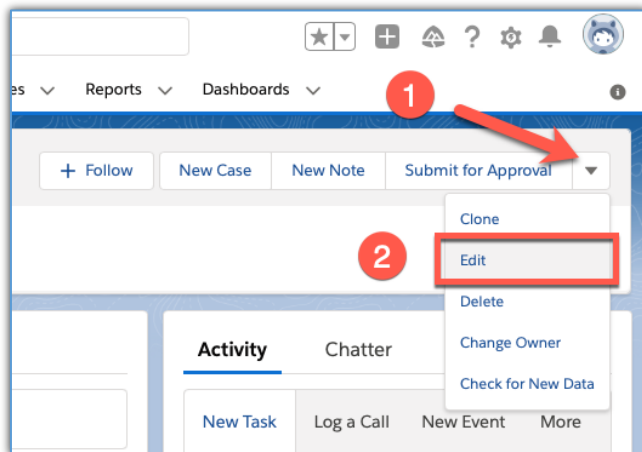
2. Complete the required **Last Name** and any other desired fields. Click **Save** to create the new contact.

This screenshot shows the 'New Contact' form in Salesforce. The form is titled 'New Contact' and has a 'Contact Information' section. The 'Contact Owner' is listed as Christopher McClure. The 'Name' section is highlighted with a red box and a red circle '1'. It includes fields for Salutation (Dr.), First Name (Otto), and Last Name (Octavius). The 'Last Name' field is required, indicated by an asterisk. Other fields include Phone, Home Phone, Mobile, Other Phone, Fax, Email, Account Name, Title, Department, and Birthdate. At the bottom of the form, there are buttons for 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted with a red box and a red circle '2'.

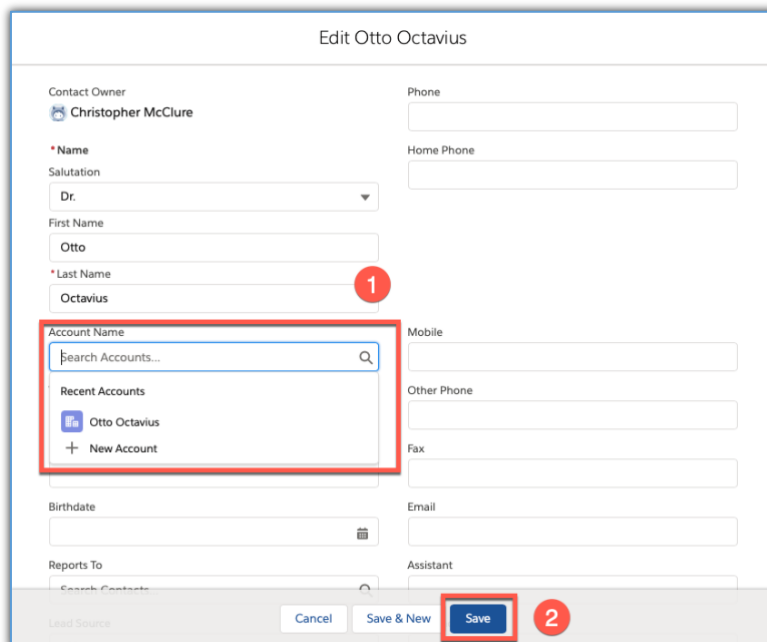
3. The contact page displays a green notification to confirm the new contact.



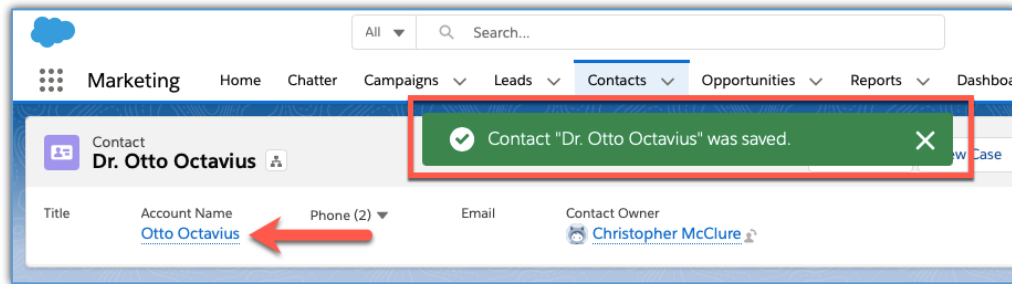
4. To associate this contact with an account, click the down arrow in the contact menu (#1 below), then click **Edit**.



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.

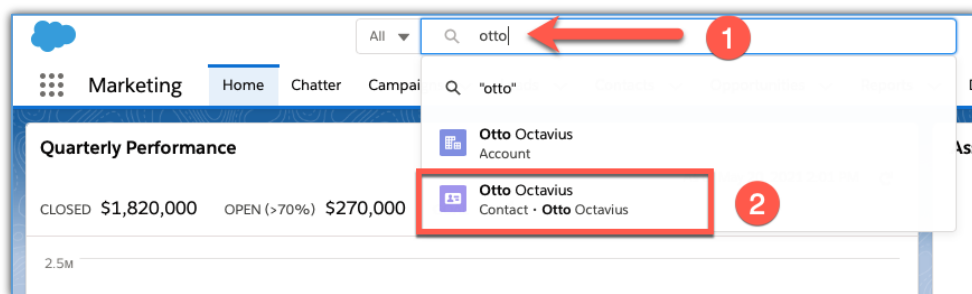


3 How to Create a Case

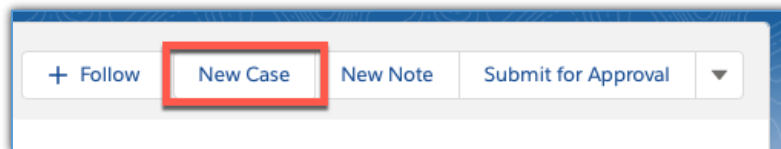
Cases are for questions, issues, or feedback from customers. They are most easily created from a contact or account page. Cases can also be created and associated with a contact later.

3.1 From a Contact or Account Page

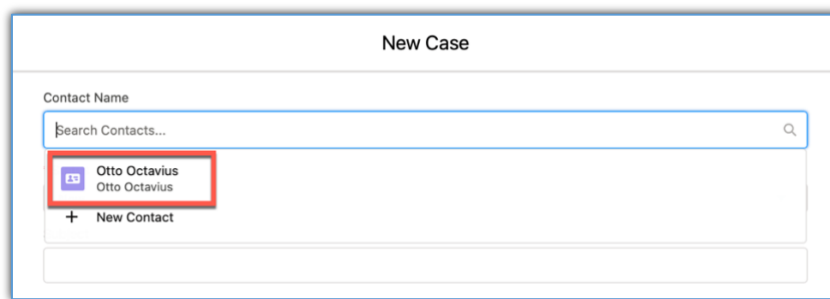
1. Search for the desired contact or account in the search box, then click the record.



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**.

New Case

Contact Name
Otto Octavius

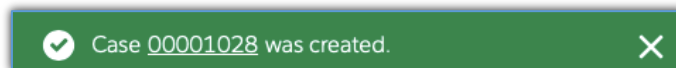
Status
New

Subject
Mystery Charge

Description
Otto's account has an unusual charge that needs to be checked.

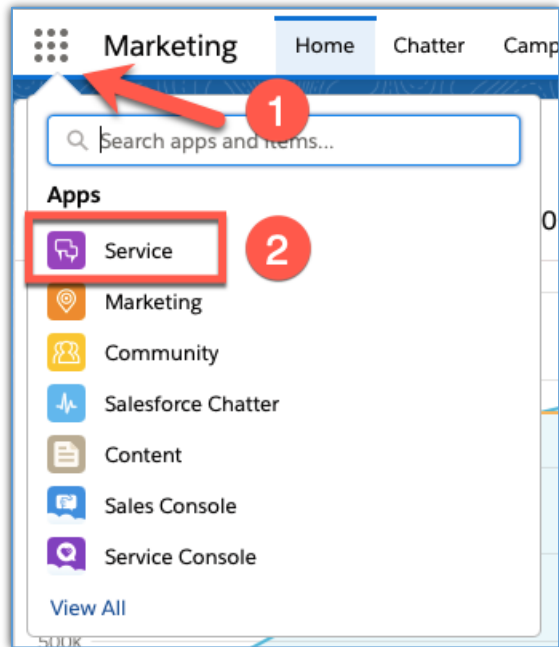
Save

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

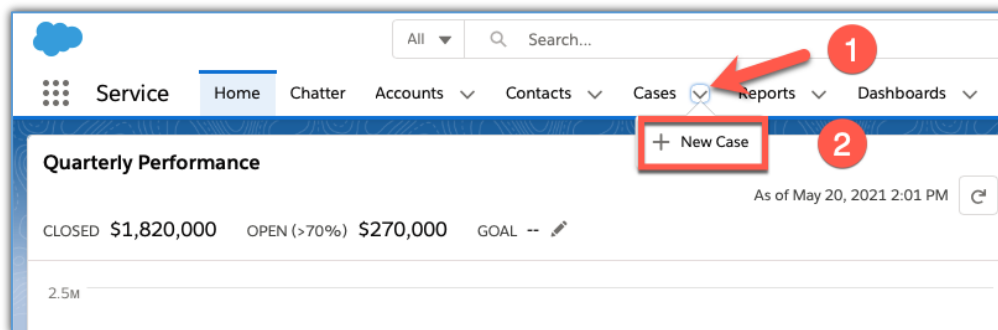


3.2 From the Case Tab

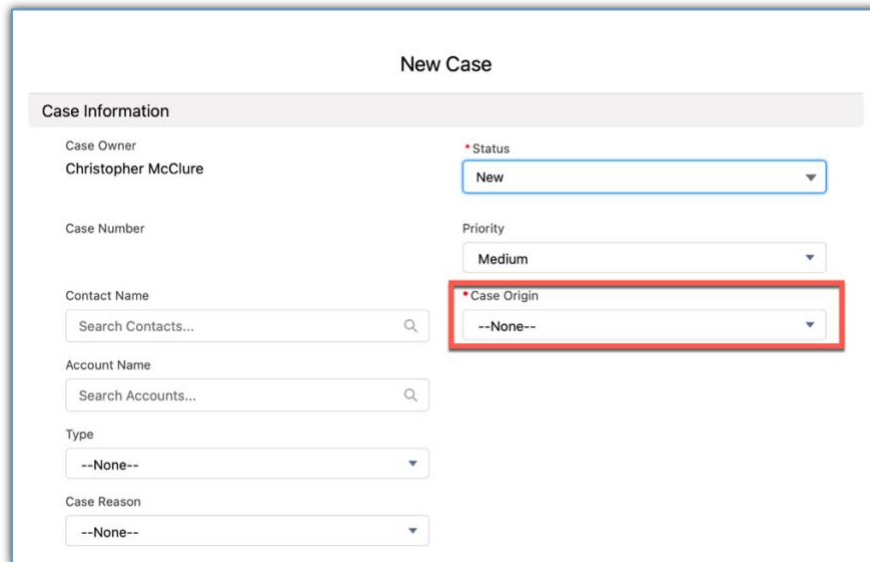
1. If you're not already in the Service App, click the App Launcher and then click **Service**.



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.



New Case

Case Information

Case Owner: Christopher McClure

* Status: New

Case Number:

Priority: Medium

Contact Name: Search Contacts...

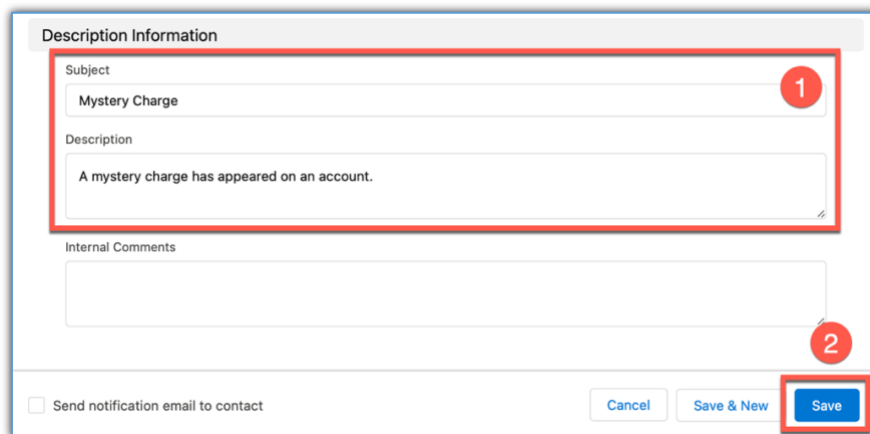
* Case Origin: --None--

Account Name: Search Accounts...

Type: --None--

Case Reason: --None--

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



Description Information

Subject: Mystery Charge

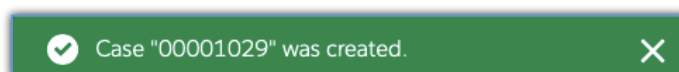
Description: A mystery charge has appeared on an account.

Internal Comments:

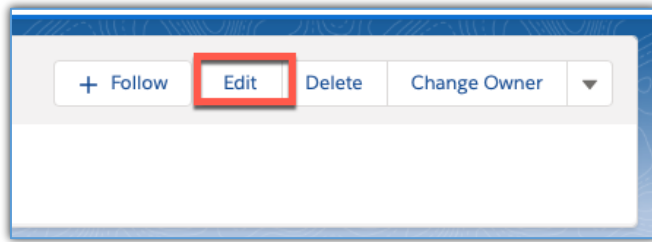
☐ Send notification email to contact

Cancel Save & New Save

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



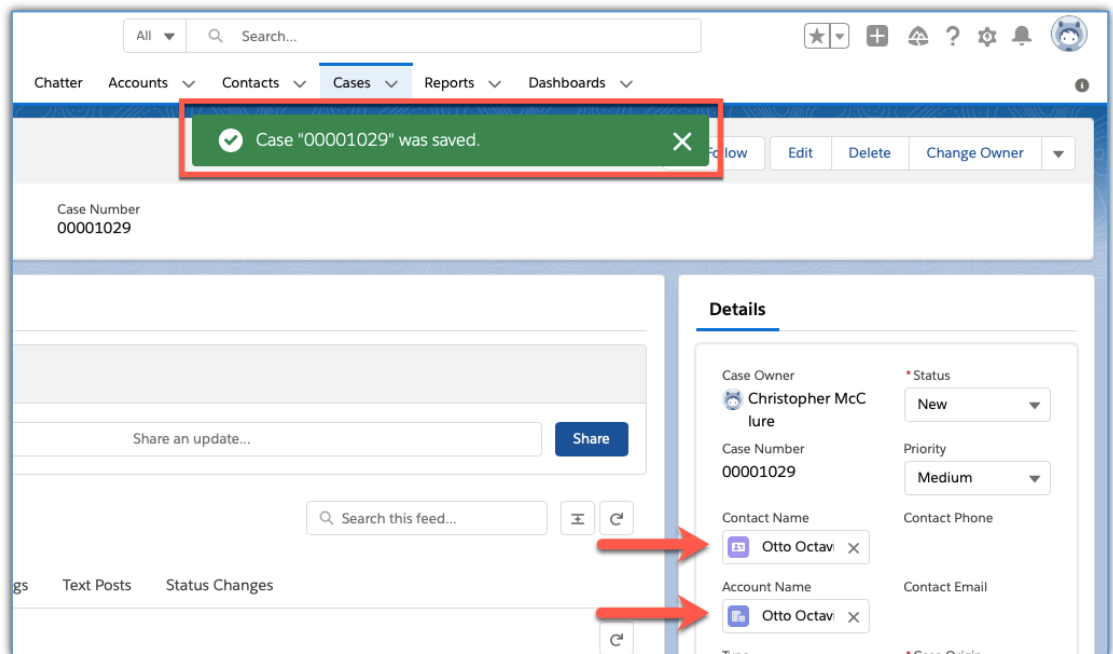
6. To associate the case with a contact, click **Edit** from the case page to open the edit window.



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

A screenshot of the 'Edit 00001029' case window in Salesforce. The window is divided into two columns. The left column contains fields for Case Owner (Christopher McClure), Case Number (00001029), Contact Name (with a dropdown menu open showing 'Otto Octavius' selected and highlighted with a red box and a red circle with the number 2), Case Reason (set to '--None--'), Web Email, Web Name, and a checkbox for 'Send notification email to contact'. The right column contains fields for Status (set to 'New'), Priority (set to 'Medium'), Contact Phone, Contact Email, Case Origin (set to 'Email'), Web Company, and Web Phone. At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted with a red box and a red circle with the number 3. A red arrow points to the 'Contact Name' field with a red circle with the number 1.

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

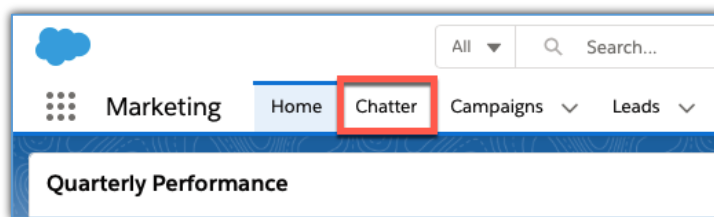


4 How to Create a Chatter Post

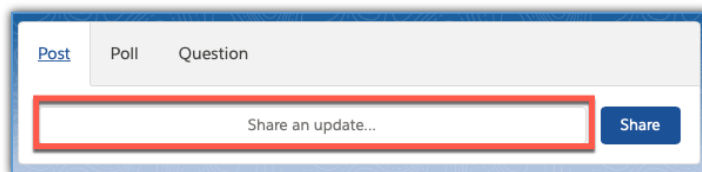
A Chatter post lets you communicate with other users, referencing specific records and users as needed. A post may be created from the Chatter tab, or from any contact, account, or case.

4.1 From the Chatter Tab

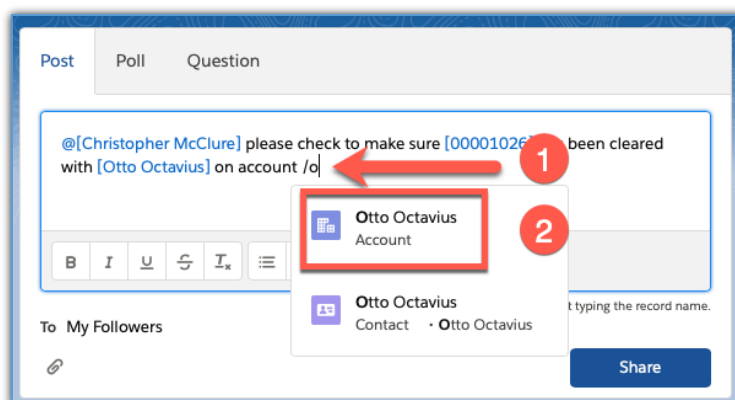
1. Click the **Chatter** tab.



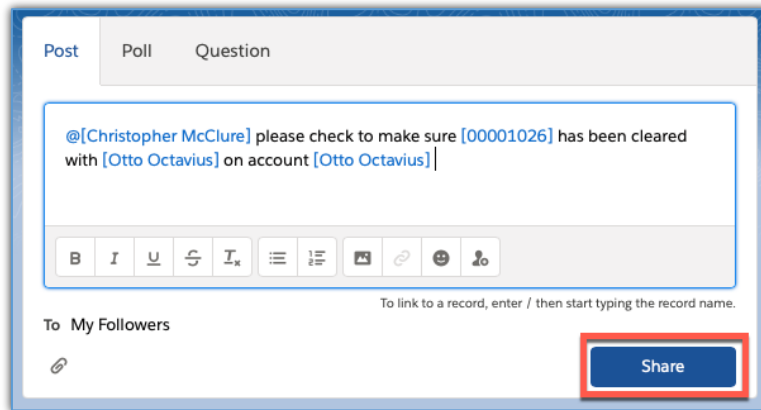
2. On the Chatter page displays, click the text box to write your post.



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

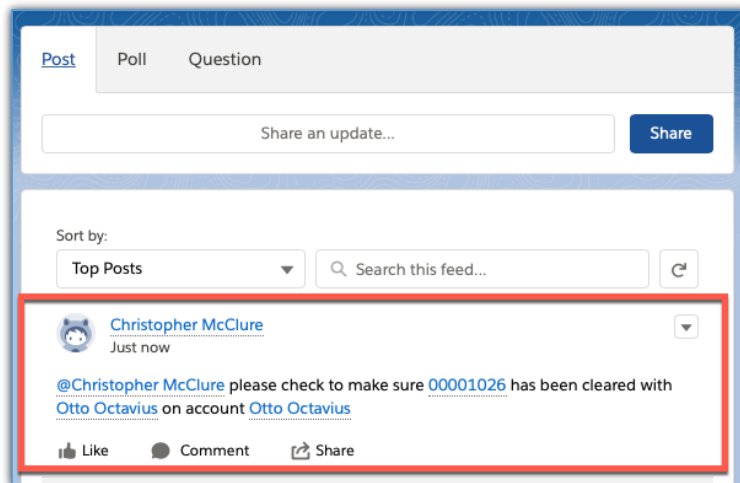


4. Click **Share** to create your post.



The screenshot shows the Salesforce post creation interface. At the top, there are tabs for "Post", "Poll", and "Question". The "Post" tab is selected. Below the tabs is a text input area containing the text: "@Christopher McClure please check to make sure [00001026] has been cleared with [Otto Octavius] on account [Otto Octavius]". Below the text input area is a rich text editor toolbar with icons for bold (B), italic (I), underline (U), link (chain), unlink (chain with slash), bulleted list, numbered list, insert image, insert link, emoji, and user avatars. Below the toolbar is a "To" field with the text "To My Followers" and a link icon. At the bottom right, there is a blue "Share" button highlighted with a red rectangle. Above the "Share" button, there is a small text hint: "To link to a record, enter / then start typing the record name."

5. The post will display in the feed below.

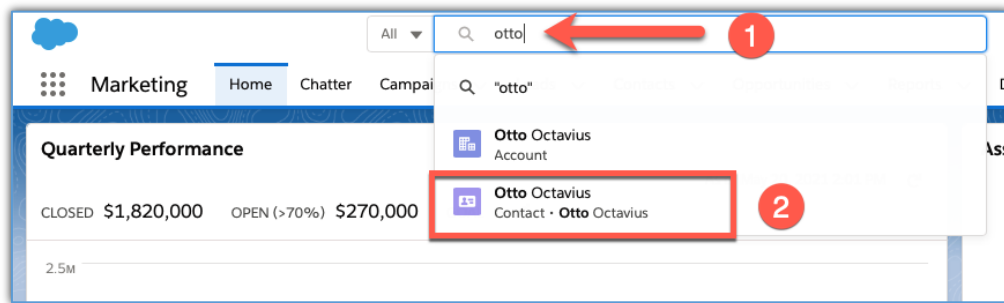


The screenshot shows the Salesforce feed interface. At the top, there are tabs for "Post", "Poll", and "Question". The "Post" tab is selected. Below the tabs is a text input area with the placeholder text "Share an update..." and a blue "Share" button. Below the input area is a "Sort by:" dropdown menu set to "Top Posts" and a search bar with the placeholder text "Search this feed...". Below the search bar is a post by "Christopher McClure" with the text "@Christopher McClure please check to make sure 00001026 has been cleared with Otto Octavius on account Otto Octavius". The post is highlighted with a red rectangle. Below the post are icons for "Like", "Comment", and "Share".

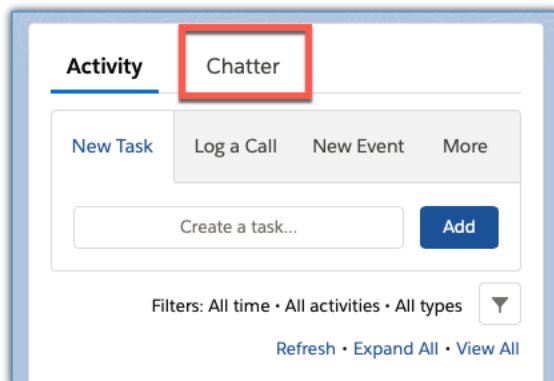
4.2 From a Contact

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.



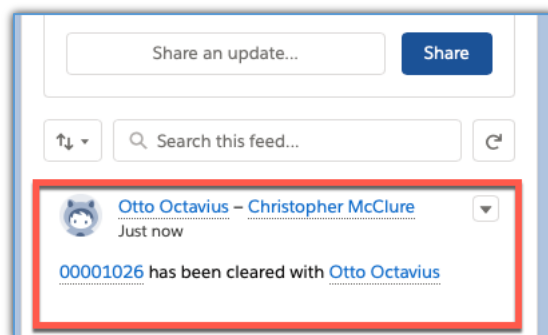
2. On the contact page, click the **Chatter** tab.



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**.

The screenshot shows the Salesforce post creation interface. At the top, there are tabs for 'Post', 'Poll', and 'Question'. The 'Post' tab is selected. Below the tabs is a text input area where the text '[00001026] has been cleared with [Otto Octavius]' is entered. Below the text input area is a rich text editor with various formatting options. Below the rich text editor is a section for tagging, with a red circle containing the number '2' next to the 'Share' button. A red circle containing the number '1' is in the top right corner of the post creation area.

4. The post will display in the feed below.

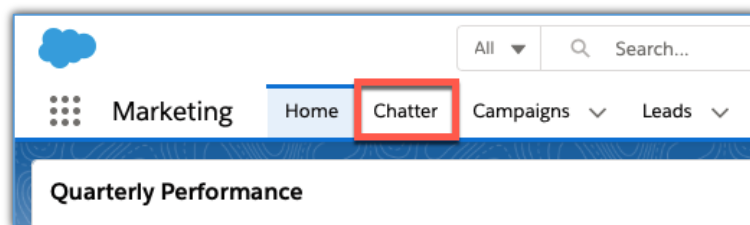


5 How to Create a Chatter Poll

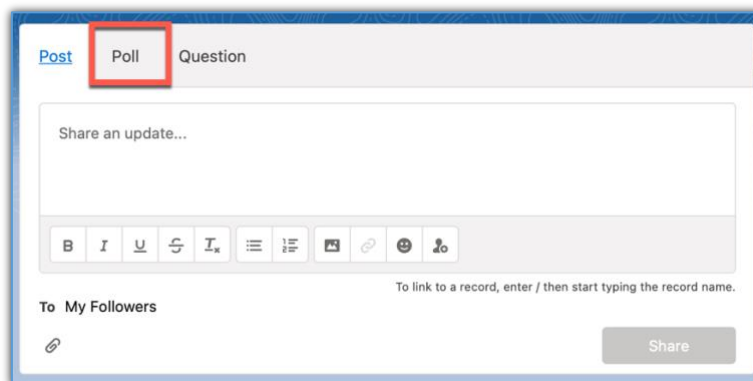
A Chatter poll allows you to create a poll that other users can vote in. A poll may be created from the Chatter tab, or from any contact, account or case.

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.

The screenshot shows the Salesforce poll creation interface. At the top, there are three tabs: "Post", "Poll" (which is selected and highlighted in blue), and "Question". Below the tabs, the "Question" field is highlighted with a red border and contains the text "When should we hold weekly team meetings?". Below this, there are two "Choice" fields. "Choice 1" contains "Mondays at 11am" and "Choice 2" contains "Tuesdays at 10am". At the bottom, there is a "To: My Followers" dropdown, a blue button with a plus icon and the text "+ Add new choice", and a blue button labeled "Ask".

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

The screenshot shows the same Salesforce poll creation interface as the previous one, but with an additional "Choice 3" field below "Choice 2". A red arrow points to the "+ Add new choice" button, which is also highlighted with a red border. The "Question" field still contains "When should we hold weekly team meetings?", "Choice 1" contains "Mondays at 11am", and "Choice 2" contains "Tuesdays at 10am". The "To: My Followers" dropdown, the "Ask" button, and the "+ Add new choice" button remain at the bottom.

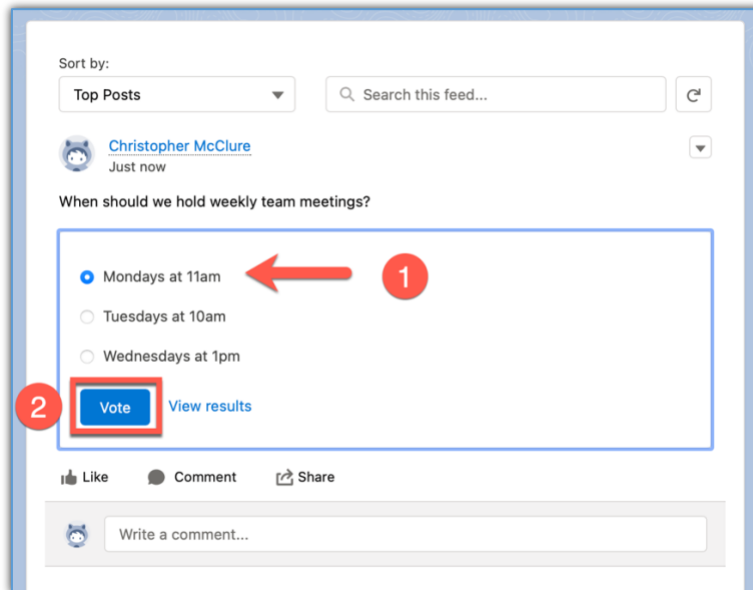
5. Click **Ask** to post the poll once the desired number of **Choice** fields are completed.

The screenshot shows the 'Ask' tab in the Salesforce interface. At the top, there are three tabs: 'Post', 'Poll' (selected), and 'Question'. Below the tabs, there is a 'Question' field containing the text 'When should we hold weekly team meetings?'. Underneath the question, there are three 'Choice' fields: 'Choice 1' with 'Mondays at 11am', 'Choice 2' with 'Tuesdays at 10am', and 'Choice 3' with 'Wednesdays at 1pm'. At the bottom left, there is a '+ Add new choice' button. At the bottom right, there is a blue 'Ask' button, which is highlighted with a red rectangle.

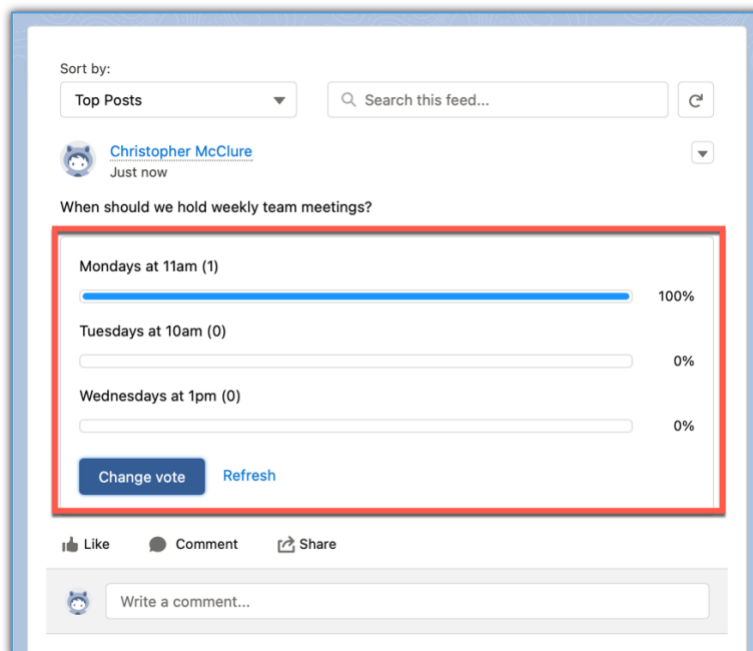
6. The poll will display in the feed below.

The screenshot shows the Salesforce feed. At the top, there is a search bar with the text 'What would you like to ask?' and a blue 'Ask' button. Below the search bar, there is a 'Sort by:' dropdown menu set to 'Top Posts' and a search bar with the text 'Search this feed...'. The main feed area shows a post by 'Christopher McClure' with the text 'Just now'. The post content is 'When should we hold weekly team meetings?'. Below the text, there are three radio button options: 'Mondays at 11am', 'Tuesdays at 10am', and 'Wednesdays at 1pm'. At the bottom of the poll options, there is a 'Vote' button and a 'View results' link. Below the poll, there are three icons: 'Like', 'Comment', and 'Share'. At the bottom of the feed, there is a comment input field with the text 'Write a comment...'.

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



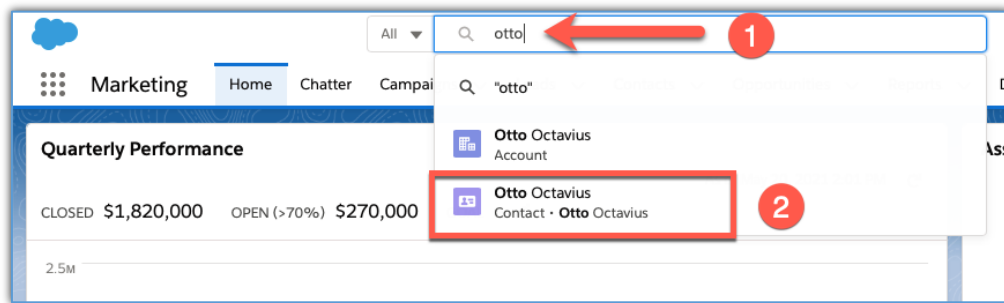
8. The results of the poll display to confirm your vote.



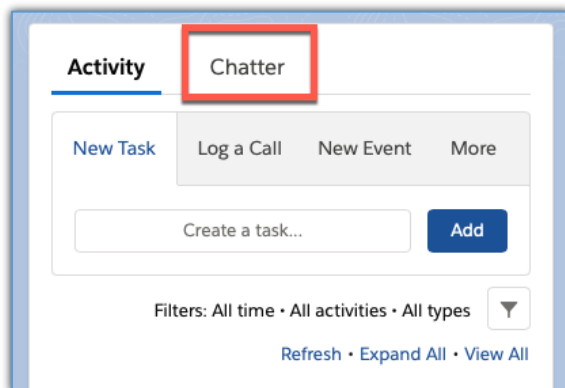
5.2 From a Contact

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.

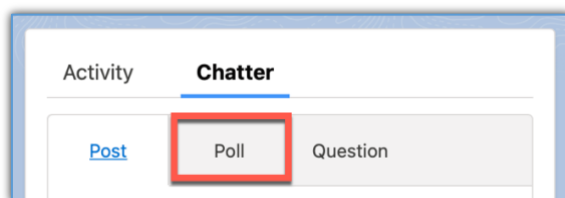
1. Search for the desired contact in the search box. Select the contact.



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.

Activity **Chatter**

Post **Poll** Question **1**

Question

What should we send Otto to celebrate his birthday?

Choice 1

A treat (like chocolates)

Choice 2

Free merchandise

To this contact

+ Add new choice **2** Ask

5. The poll will display below.

Activity **Chatter**

Post **Poll** Question

What would you like to ask? Ask

Search this feed...

Christopher McClure
Just now

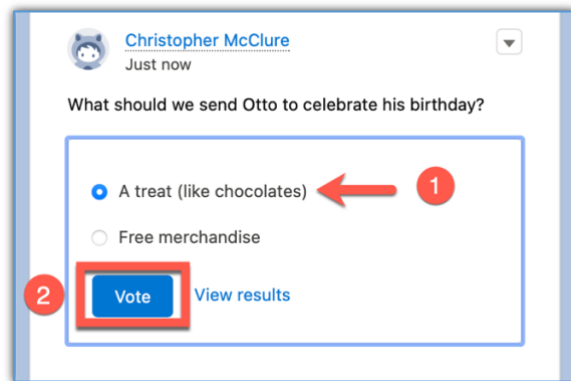
What should we send Otto to celebrate his birthday?

☐ A treat (like chocolates)

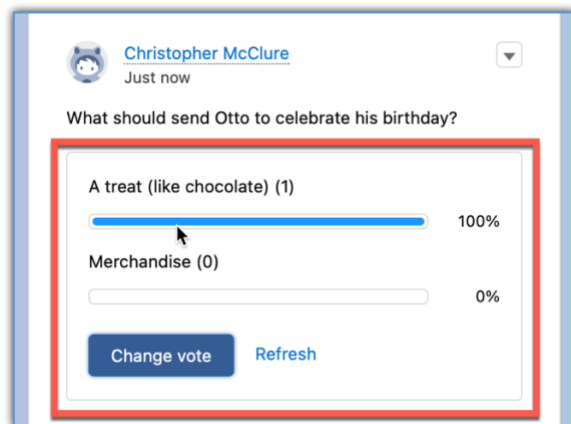
☐ Free merchandise

Vote View results

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



7. The poll results display to confirm your vote.

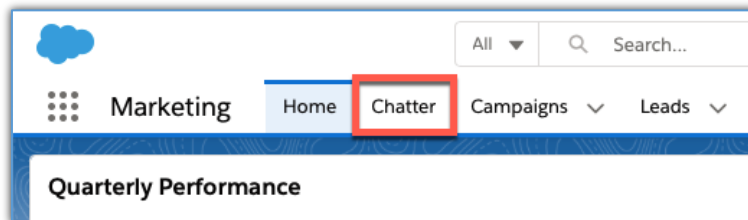


6 How to Create a Chatter Question

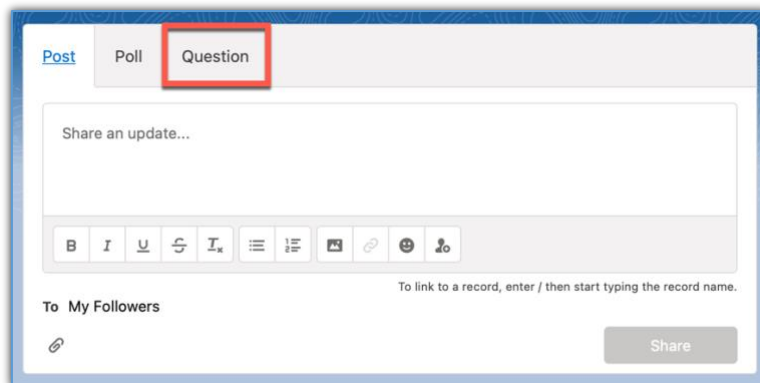
A Chatter question allows you to ask an open-ended question and get responses from other users. A question may be created from the Chatter tab, or from any contact, account or case.

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.

Post Poll **Question**

1

• Question (Enter up to 255 characters)

How do I create a report to find accounts I've created in a specific zip code?

Details

Some of my accounts will be affected by a new ordinance, and I was hoping to get a list of them in that area (one zip code). I'll need the mailing addresses included.

To link to a record, enter / then start typing the record name.

To My Followers

2 Ask

4. The question will display below.

Post Poll **Question**

What would you like to know? Ask

Sort by: Top Posts Search this feed...

Christopher McClure asked a question. Just now

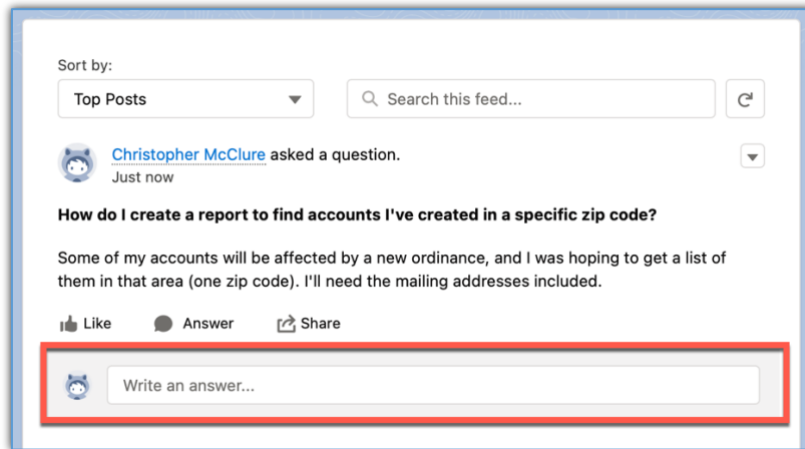
How do I create a report to find accounts I've created in a specific zip code?

Some of my accounts will be affected by a new ordinance, and I was hoping to get a list of them in that area (one zip code). I'll need the mailing addresses included.

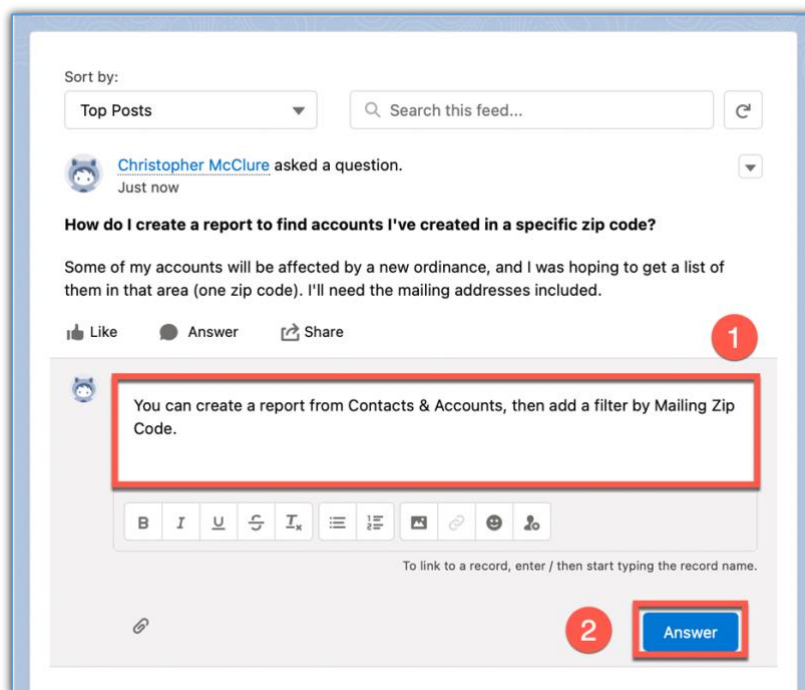
Like Answer Share

Write an answer...

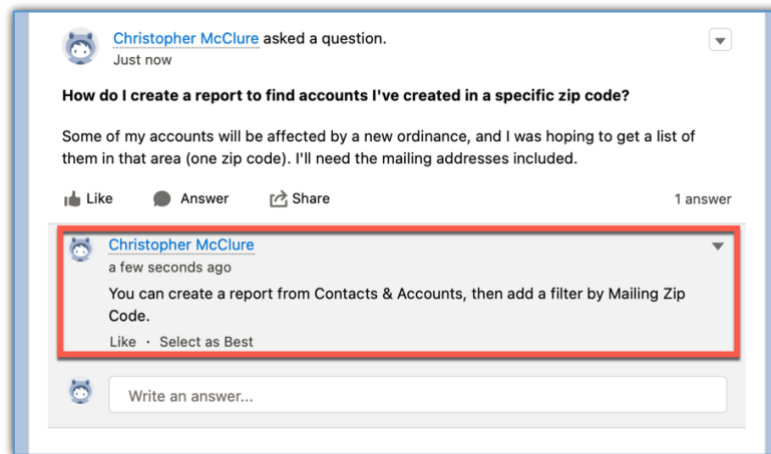
5. To answer a question, click the text box directly below the question.



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



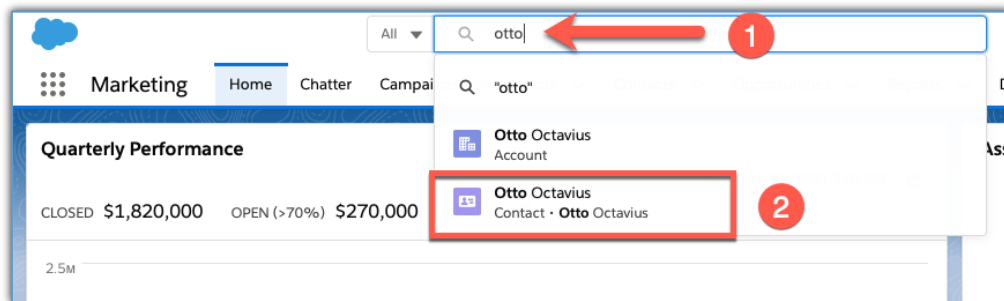
7. Your answer will display below the question.



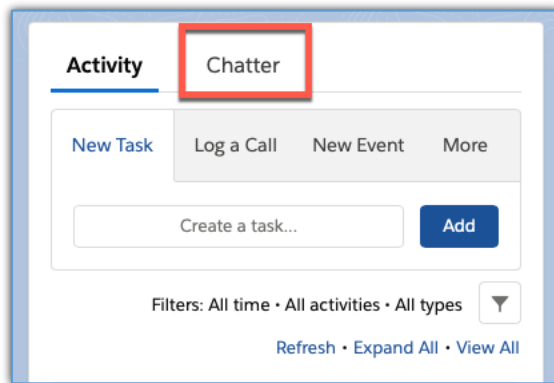
6.2 From a Contact

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.



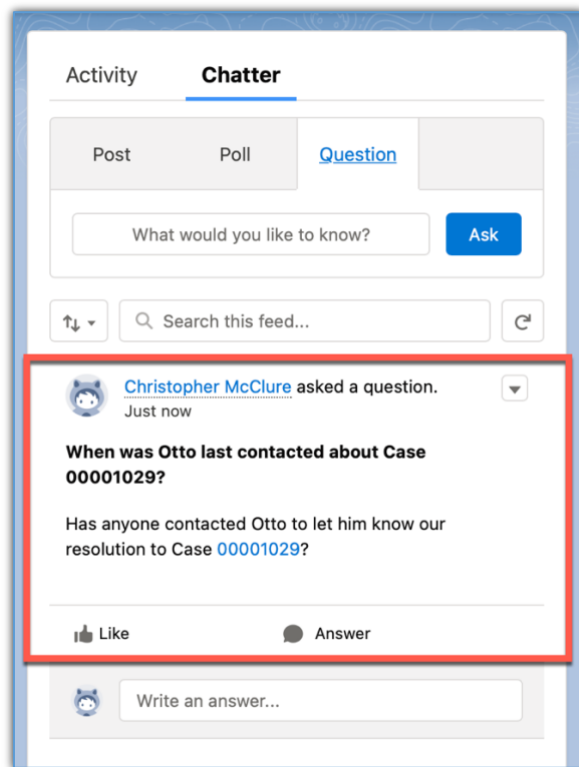
3. Click the **Question** tab.

The screenshot shows the Salesforce Chatter interface. At the top, there are two tabs: 'Activity' and 'Chatter'. The 'Chatter' tab is selected. Below the tabs, there are three buttons: 'Post', 'Poll', and 'Question'. The 'Question' button is highlighted with a red box. Below the buttons is a text input field with the placeholder text 'Share an update...'. Below the text field is a rich text editor with various formatting options (bold, italic, underline, link, unlink, bulleted list, numbered list) and icons for inserting images, links, emojis, and mentions. Below the rich text editor is a small text prompt: 'To link to a record, enter / then start typing the record name.' Below this prompt is a label 'To this contact' and a link icon. At the bottom right of the form is a 'Share' button. At the very bottom of the interface is a search bar with the placeholder text 'Search this feed...' and a refresh icon.

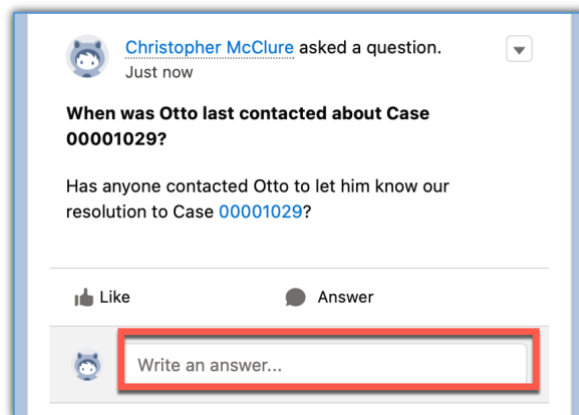
4. Complete the **Question** and **Details** boxes and then click **Ask** to post the question.

The screenshot shows the Salesforce Chatter interface with the 'Question' tab selected. The 'Question' button is highlighted with a red box and a red circle with the number '1'. Below the buttons, the 'Question' field is filled with the text 'When was Otto last contacted about Case 00001029?'. Below the 'Question' field is the 'Details' field, which is also filled with the text 'Has anyone contacted Otto to let him know our resolution to Case 00001029?'. Below the 'Details' field is a rich text editor with various formatting options and icons. Below the rich text editor is a small text prompt: 'To link to a record, enter / then start typing the record name.' Below this prompt is a label 'To this contact' and a link icon. At the bottom right of the form is a blue 'Ask' button, which is highlighted with a red box and a red circle with the number '2'.

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.

The screenshot shows a Salesforce question interface. At the top, a user profile for Christopher McClure is shown with the text "Christopher McClure asked a question. Just now". Below this is the question: "When was Otto last contacted about Case 00001029?". The question text continues: "Has anyone contacted Otto to let him know our resolution to Case 00001029?". Below the question are two buttons: "Like" and "Answer". The "Answer" button is highlighted with a red box and a red circle with the number "2". Below the buttons is a text input field with a red border and a red circle with the number "1". The input field contains the text "I'll send him a message today". Below the input field is a rich text editor toolbar with buttons for bold, italic, underline, link, unlink, bulleted list, and numbered list. Below the toolbar is a text input field with a red border and a red circle with the number "2". The input field contains the text "I'll send him a message today". Below the input field is a text input field with a red border and a red circle with the number "2". The input field contains the text "I'll send him a message today". Below the input field is a text input field with a red border and a red circle with the number "2". The input field contains the text "I'll send him a message today".

8. The answer will display below.

The screenshot shows the same Salesforce question interface as before, but now the answer is displayed below the question. The answer is a post by Christopher McClure, dated "a few seconds ago", with the text "I'll send him a message today." Below the answer are two buttons: "Like" and "Select as Best". The answer post is highlighted with a red box. Below the answer post is a text input field with a red border and a red circle with the number "2". The input field contains the text "I'll send him a message today". Below the input field is a text input field with a red border and a red circle with the number "2". The input field contains the text "I'll send him a message today". Below the input field is a text input field with a red border and a red circle with the number "2". The input field contains the text "I'll send him a message today".