

Section 1: The Basics

4 / 4 | 24min

**Section 2: Record Management**

4 / 4 | 30min

**Section 3: Personal Settings**

2 / 2 | 9min

**Section 4: Communication and Relationship Management**

2 / 2 | 16min

**Section 5: List Views and Reporting**

1 / 1 | 9min

**Section 6: Lightning Basics**

1 / 1 | 8min

**Section 7: Wrapping Things Up**

3 / 3 | 5min

**Section 8: Continue Learning - Free/Discounted Sys Admin Training**

1 / 1 | 1min



Section 1: The Basics



4 / 4 | 24min

- 1. First Steps

4min

- 2. Terminology

7min

- 3. Types of Fields

6min

- 4. Navigation

8min

Section 2: Record Management



4 / 4 | 30min

- 5. Understanding Accounts

8min

- 6. Working with Contacts

6min

- 7. Working the Deal - Opportunities

9min

- 8. Using & Scheduling Products

8min

Section 3: Personal Settings



2 / 2 | 9min



Section 3: Personal Settings

2 / 2 | 9min



- 9. Changing your Tabs

4min

- 10. Changing your Chatter & Email Settings

5min

Section 4: Communication and Relationship Management



2 / 2 | 16min

- 11. Tracking Interactions: Overview & Tasks

7min

- 12. Tracking Interactions: Events and Emails

9min

Section 5: List Views and Reporting



1 / 1 | 9min

- 13. Creating a List View & Customizing Reports

9min

Section 6: Lightning Basics



1 / 1 | 8min

- 14. Lightning UI: Salesforce Navigation

8min



Section 7: Wrapping Things Up



3 / 3 | 5min

- 15. Next Steps for Success in SFDC

4min

- Quiz 1: Test Your Recall

- 16. Answers to Final Quiz

1min

Section 8: Continue Learning - Free/Discounted Sys Admin Training



1 / 1 | 1min

- 17. Learn Salesforce System Administration
step-by-step

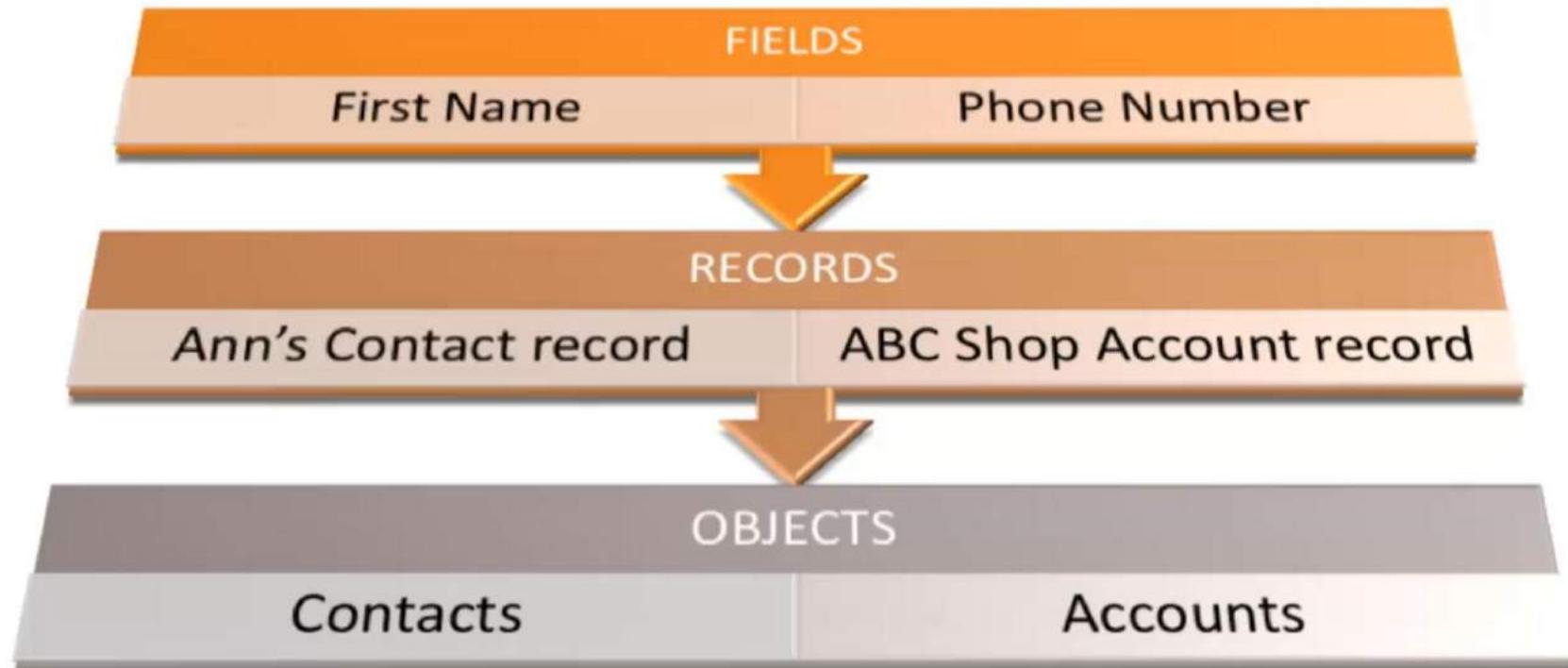
1min

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[Teach on Udemy](#)





Contact Edit: John Smith

https://na17.salesforce.com/003o0000001voa5/e?retURL=%2F003o0000001voa5

salesforce 14

Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts **Contacts** Opportunities Reports Dashboards Products +

Create New... Recent Items

Contact Edit John Smith

Help for this Page

Recent Items

- John Smith
- ABC Shop – 200 widgets 11/14
- Sue Someone
- ABC Shop – 400 widgets 12/14
- ABC Shop
- Leanne Tomlin
- Edward Stamos

Recycle Bin

Contact Edit

Contact Information

= Required Information

Contact Owner	Joe User	Phone	<input type="text"/>
First Name	--None-- <input type="text" value="John"/>	Mobile	<input type="text"/>
Last Name	<input type="text" value="Smith"/>	Email	<input type="text" value="jsmith@email.com"/>
Account Name	<input type="text" value="ABC Shop"/> 	Reports To	<input type="text"/> 
Title	<input type="text"/>		

Address Information

Copy Mailing Address to Other Address

Mailing Country	<input type="text" value="United States"/>	Other Country	<input type="text" value="United States"/>
Mailing Street	<input type="text"/>	Other Street	<input type="text"/>
Mailing City	<input type="text"/>	Other City	<input type="text"/>
Mailing State/Province	<input type="text" value="--None--"/> 	Other State/Province	<input type="text" value="--None--"/> 

Chat 

Contact Edit: John Smith

https://na17.salesforce.com/003o0000001voa5/e?retURL=%2F003o0000001voa5

salesforce 14

Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Contacts Opportunities Reports Dashboards Products +

Create New... Help for this Page

Contact Edit John Smith

Recent Items

- John Smith
- ABC Shop – 200 widgets 11/14
- Sue Someone
- ABC Shop – 400 widgets 12/14
- ABC Shop
- Leanne Tomlin
- Edward Stamos

Recycle Bin

Address

Field Record Object Tab

= Required Information

Phone:

Mobile:

Email: jsmit@email.com

Reports To:

Mailing Country: United States

Mailing Street:

Mailing City:

Mailing State/Province: --None--

Other Country: United States

Other Street:

Other City:

Other State/Province: --None--

Copy Mailing Address to Other Address

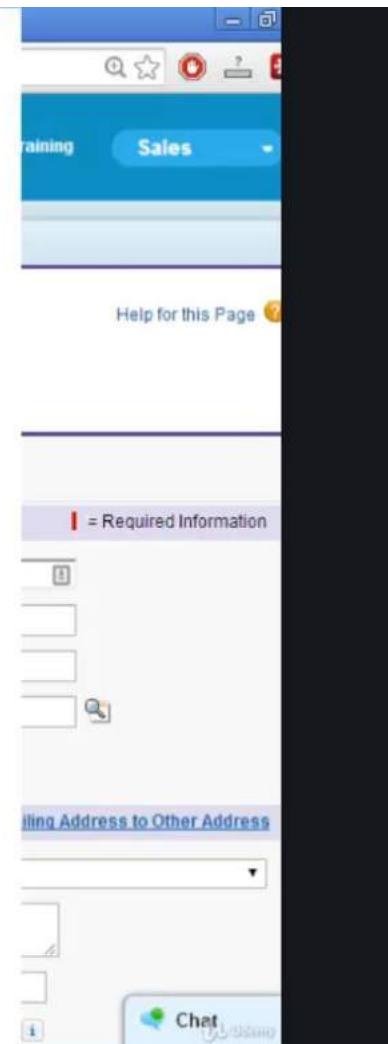
Chat

The image shows a screenshot of the Salesforce Contact Edit page for 'John Smith'. The page has a blue header with the Salesforce logo and navigation links. Below the header is a navigation bar with links for Home, Chatter, Files, Leads, Accounts, Contacts (which is highlighted in purple), Opportunities, Reports, Dashboards, Products, and a plus sign. On the left, there's a sidebar with a 'Create New...' button, a 'Recent Items' section listing contacts and leads, and a 'Recycle Bin' button. The main content area is titled 'Contact Edit' and shows 'John Smith'. It includes sections for 'Address' and 'Phone/Mobile/Email/Reports To'. A large red watermark with the text 'Field Record Object Tab' is overlaid across the center of the page. At the bottom right, there's a 'Chat' button.

Terminology

Key Standard Objects

	Accounts	An Account is a company and organization you do business with.
	Contacts	A Contact is a person who works at those companies or organizations.
	Leads	A Lead is a combination of the two. It includes information about both the person and where they work.
	Opportunities	An Opportunity is any potential money-making opportunity ("sales deal") that you want to track in Salesforce.com.
	Cases	A case is how you track a customer's feedback, problems, or questions after the sale.



Salesforce.com (SFDC) is an online database that comes pre-configured to meet common sales team needs.

Contact Edit: John Smith - x

https://na17.salesforce.com/003o0000001voa5/e?retURL=%2F003o0000001voa5

salesforce 14

Search... Search

Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts **Contacts** Opportunities Reports Dashboards Products +

Create New... Help for this Page

Contact Edit John Smith

Recent Items

- John Smith
- ABC Shop – 200 widgets 11/14
- Sue Someone
- ABC Shop – 400 widgets 12/14
- ABC Shop
- Leanne Tomlin
- Edward Stamos

Recycle Bin

Campaigns - Marketing Initiatives

Address

Copy Mailing Address to Other Address

Mailing Country: United States

Mailing Street:

Mailing City:

Mailing State/Province: --None--

Other Country: United States

Other Street:

Other City:

Other State/Province: --None--

Phone: []

Mobile: []

Email: jsmithe@email.com

Reports To: []

Chat

Contact Edit: John Smith

https://na17.salesforce.com/003o0000001voa5/e?retURL=%2F003o0000001voa5

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Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Contacts Opportunities Reports Dashboards Products +

Create New... Recent Items

- John Smith
- ABC Shop – 200 widgets 11/14
- Sue Someone
- ABC Shop – 400 widgets 12/14
- ABC Shop
- Leanne Tomlin
- Edward Stamos

Recycle Bin

Contact Edit John Smith

Products - the things you Sell

Mailing Country: United States Other Country: United States

Mailing Street:

Mailing City:

Mailing State/Province: --None--

Other Street:

Other City:

Other State/Province: --None--

= Required Information

Copy Mailing Address to Other Address

Chat

Contact Edit: John Smith

https://na17.salesforce.com/003o0000001voa5/e?retURL=%2F003o0000001voa5

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Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts **Contacts** Opportunities Reports Dashboards Products +

Create New... Recent Items

- John Smith
- ABC Shop – 200 widgets 11/14
- Sue Someone
- ABC Shop – 400 widgets 12/14
- ABC Shop
- Leanne Tomlin
- Edward Stamos

Recycle Bin

Contact Edit
John Smith

Next: Record Management

Mailing Country: United States Other Country: United States

Mailing Street:

Mailing City:

Mailing State/Province: --None--

Other Street:

Other City:

Other State/Province: --None--

Copy Mailing Address to Other Address

Chat

= Required Information



Data Values are stored in Fields



Data = Value = Entry

Account Edit: Acme ~ salesforce.com

https://na17.salesforce.com/001c0000002m1ua/e?retURL=%2F001c0000002m1ua

Acme

Shortcut
Unresolved Items

Recent Items
Acme
Acme - 200 Widgets
Acme - 600 Widgets
ABC Shop - 400 widgets
12/14
test
Howard Jones
Edward Stamos
ABC Shop
Global Media
salesforce.com Inc.

Recycle Bin

Account Edit

Save Save & New Cancel

Account Information

Account Owner: Joe User

Phone: (212) 555-5555

Account Name: Acme

Fax: (212) 555-5555

Parent Account:

Date:

Additional Information

Type: Prospective

Description: ABC Shop

Industry: Manufacturing

Billing Country: United States

Shipping Country: United States

Billing Street: 10 Main Rd.

Shipping Street: 10 Main Rd.

Billing City: New York

Shipping City: New York

Billing State/Province: New York

Shipping State/Province: New York

Contacts have lookups to Accounts

Chat

Udemy

Account Edit: Acme ~ sales ~

https://na17.salesforce.com/001o0000002m1ua/e?retURL=962F001o0000002m1ua

Acme

Shortcut
Unresolved Items

Recent Items
Acme
Acme - 200 Widgets
Acme - 600 Widgets
ABC Shop - 400 widgets
12/14
test
Howard Jones
Edward Stamos
ABC Shop
Global Media
salesforce.com Inc.

Recycle Bin

Account Edit
Save Save & New Cancel

Account Information
Account Owner Joe User
Account Name Acme
Parent Account
Additional Information
Type Prospe
Industry Manufa
Description
Billing Country United States
Billing Street 10 Main Rd.
Billing City New York
Billing State/Province New York
Shipping Country United States
Shipping Street 10 Main Rd.
Shipping City New York
Shipping State/Province New York

Opportunities have lookups to Accounts

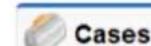
= Required Information

Chat

Formula fields - Calculate values in other fields and output can be either text, date, number, etc.

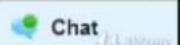
Multi-select Picklists - Picklists in which you can select multiple answers

Text Area - larger text fields that show more characters on the page at one time



Cases

New Case



Chat

salesforce.com - Enterprise

https://na17.salesforce.com/home/home.jsp

Joe User

Sales

Home Chatter Files Leads Accounts Contacts Opportunities Reports Dashboards Products +

Create New...

Recent Items

- Carole White
- Howard Jones
- Geoff Minor
- Jim Steele
- Acme - 1,200 Widgets
- Global Media - 400 Widgets
- Global Media
- Acme
- John Gardner

Custom Links

Messages and Alerts

Recycle Bin

Dashboard

As of 5/22/2014 9:21 AM. Displaying data as Aspiratech Trainer.

Refresh

Sales

Closed Sales To Date

\$0.00 \$500,000.00 \$1,500,000.00

Sum of Amount

Marketing

Leads by Lead Source

Lead Source	Record Count
Advertisement	1
Employee Referral	1
Other	2

Support

Open Cases By Priority

Priority	Record Count
High	1
Low	1

Priority Record Count

Customize Page

Chat

The dashboard section is highlighted with a red border.

salesforce.com - Enterprise

https://na17.salesforce.com/home/home.jsp?tsid=02uo0000000IKos

Marketing

Sales
Call Center
Community
Google AdWords
Content
Salesforce Chatter
Site.com
AppExchange
Developer Community

Joe User

Search... Search

Home Chatter Files Campaigns Leads Contacts Opportunities Reports Dashboards +

Create New... Joe User Thursday May 22, 2014 Show Feed

Recent Items

- Carole White
- Howard Jones
- Geoff Minor
- Jim Steele
- Acme - 1,200 Widgets
- Global Media - 400 Widgets
- Global Media
- Acme
- John Gardner

Custom Links

Messages and Alerts

2:18 / 7:57

Dashboard

As of 5/22/2014 9:21 AM. Displaying data as Aspiratech Trainer

Sales Marketing Support

Closed Sales To Date

Sum of Amount

Amount	Count
\$0.00	1
\$500,000.00	1
\$1,500,000.00	1

Leads by Lead Source

Record Count Lead Source

Lead Source	Record Count
1	1
2	1

Open Cases By Priority

Priority Record Count

Priority	Record Count
High	1
Low	1

Recycle Bin

Clear

Char

Contacts: Home ~ salesfo x

https://na17.salesforce.com/003/o

Joe User ▾ Setup Help & Training Sales

Home Chatter Files Leads Accounts **Contacts** Opportunities Reports Dashboards Products +

Create New... ▾

Recent Items

- Carole White
- Howard Jones
- Geoff Minor
- Jim Steele
- Acme - 1,200 Widgets
- Global Media - 400 Widgets
- Global Media
- Acme
- John Gardner

Recycle Bin

Quick Create

First Name

*Last Name

Go to Reports ▾

Contacts Home

Tell me more! | Help for this Page

View: All Contacts ▾ Go!

Clone | Create New View

Recent Contacts

Name	Account Name	Phone	Recently Viewed
White, Carole	Global Media	(415) 555-1212	Recently Created
Jones, Howard	Acme	(212) 555-5555	Recently Modified
Minor, Geoff	Global Media	(415) 555-1212	Recently Viewed

Reports

HTML Email Status Report

Partner Accounts

Mailing List

Contact History Report

Bounced Contacts

Tools

Import My Accounts & Contacts

Sync to Outlook

Mass Email Contacts

Mass Stay-in-Touch

Mass Add Contacts to Campaign

Chat



Salesforce.com New User Training: **Understanding Accounts**

- Accounts Are the “Backbone” of Information
- Accounts represent prospective, existing, and former customers, partners, and competitors



0:43 / 8:24

Speaker Volume # :

- Accounts support many other objects within the system
- Accessing other objects is most easily accomplished directly from the Account record
- Use the related lists as a way of navigating your record details



1:05 / 8:24

Contact: Carole White ~ s × Account: Acme ~ salesfor × Account: salesforce.com × Account: salesforce.com ×

<https://na17.salesforce.com/001o0000002m1ua>

salesforce 14

Search... Search Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Contacts Opportunities Reports Dashboards Products +

Create New...

Recent Items

- Acme
- Global Media - 400 Widgets
- Acme - 1,200 Widgets
- Carole White
- salesforce.com Canada Corporation
- salesforce.com Inc.
- Geoff Minor
- Global Media
- Jon Amos
- Howard Jones

Recycle Bin

Marketing > mailing Contacts
Support - with cases
Accounting - sending invoices

2:47 / 8:24

System information

Chat

Contact: Carole White ~ s × Account: Acme ~ salesfor × Account: salesforce.com × Account: ABC Shop ~ sal ×

https://na17.salesforce.com/001c0000002m1ua

Contacts New Contact Merge Contacts Contacts Help ?

Action	Contact Name	Title	Email	Phone
Edit Del	Howard Jones	Buyer	info@salesforce.com	(212) 555-5555
				(212) 555-5555
				(212) 555-5555

Open Activities Help ?

Activity History Help ?

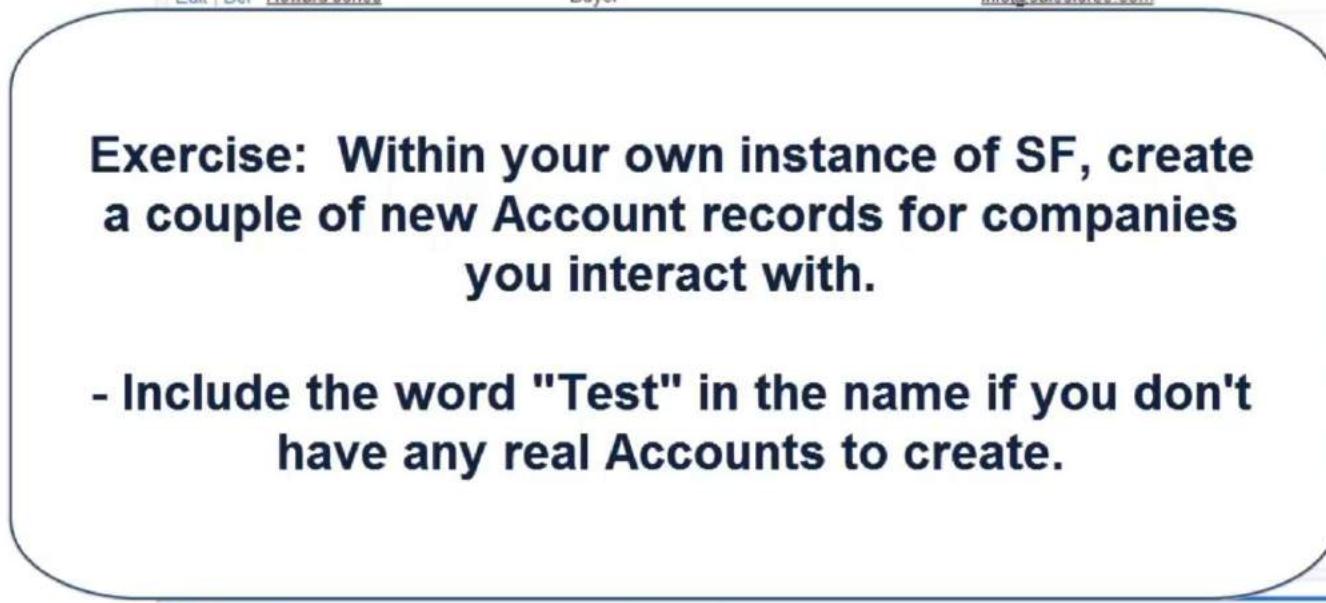
Opportunities Help ?

Amount	Close Date
0.000.00	7/7/2012
0.000.00	5/4/2012
40.000.00	3/8/2012

Cases New Case Cases Help ?

Action	Case	Contact Name	Subject	Priority	Date Opened	Status	Owner
Edit Cls	00001001	Edward Stamos	Sample Case 2: The widgets we received are the wrong size.	High	5/22/2014	New	Aspiratech Trainer
Edit Cls	00001002	Edward Stamos	Sample Case 3: Cannot track our order.	Low	5/22/2014	On Hold	Aspiratech Trainer

Partners New Chat



Exercise: Within your own instance of SF, create a couple of new Account records for companies you interact with.

- Include the word "Test" in the name if you don't have any real Accounts to create.



Salesforce.com New User Training: **Working with Contacts**

Account: ABC Shop ~ sale x

https://na17.salesforce.com/001o0000002l0AE

United States United States

System Information

Created By: Joe User, 5/22/2014 7:16 PM Last Modified By: Joe User, 5/22/2014 7:16 PM

Custom Links

Google Search Google Maps Google News
Hoovers Profile

Contacts

Action	Contact Name
Edit Del	John Smith
Edit Del	test user

Open Activities

No records to display

Activity History

No records to display

Opportunities

New Opportunity

No records to display

Cases

New Case

In B2B Sales, people are representatives of Accounts

Phone

Open Activities Help ?

Activity History Help ?

Opportunities Help ?

Chat

The screenshot shows a Salesforce account page for 'ABC Shop ~ sale'. The main content area includes sections for System Information, Custom Links, Contacts, Open Activities, Activity History, Opportunities, and Cases. A prominent callout bubble in the center contains the text 'In B2B Sales, people are representatives of Accounts'. The 'Contacts' section lists two contacts: 'John Smith' and 'test user'. The 'Opportunities' section shows no records. The page has a standard blue header and footer navigation.

Account: ABC Shop ~ sale X

https://na17.salesforce.com/001n000000021n4F

Managing Contacts > Record Relationships

SOFTWARE

United States

Last Modified By Joe User 5/22/2014 7:16 PM

Google News

Contacts Help ?

Phone

com

Open Activities Help ?

Activity History Log a Call Mail Merge Send an Email Activity History Help ?

No records to display

Opportunities New Opportunity Opportunities Help ?

No records to display

Cases New Case Chat

Home Leads Accounts **Contacts** Opportunities Reports Dashboards Documents

Account

Contact

A contact record is associated to one Account

A Contact can be associated to multiple Opportunities

The diagram illustrates the relationship between an Account and a Contact. An Account is represented by a folder icon, and a Contact is represented by a card icon. A single arrow points from the Contact icon to the Account icon, indicating that a contact record is associated with one account. Another set of arrows points from the Contact icon to three separate coin icons, representing opportunities, indicating that a contact record can be associated with multiple opportunities.

Merge My Contacts ~ sale x

https://na17.salesforce.com/merge/conmergewizard.jsp

Recycle Bin

	Master Record	John Smith [Select All] <input checked="" type="radio"/>	test user [Select All] <input type="radio"/>
	Portal User	<input type="radio"/> [Not a portal user]	<input type="radio"/> [Not a portal user]
	Contact Owner	Joe User	Joe User
	Name	John Smith	test user
	Account Name	ABC Shop	ABC Shop
	Title		
	Phone		
	Mobile		
	Email		
	Report To		
	Mailing Address		
	Other Address		
	Home Phone		
	Other Phone		
	Assistant		
	Asst. Phone		
	Lead Source		
	Last Stay-in-Touch Request Date		
	Last Stay-in-Touch Save Date		
	Birthdate		
	Department		
	Description		
	Created By	Joe User, 5/23/2014 2:18 PM	Joe User, 5/23/2014 2:18 PM
	Last Modified By	Joe User, 5/23/2014 2:18 PM	Joe User, 5/23/2014 2:18 PM

You can merge 2 or 3 Contacts at a time
Only a Sys Admin can merge records owned by others

Chat

Previous

Mass Stay-in-Touch: Recipient

<https://na17.salesforce.com/email/mass/massupdatefilter.jsp?ftype=Q&retURL=%2F003%2Fo>

salesforce 14

Search... Search

Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts **Contacts** Opportunities Reports Dashboards Products +

Create New...

Recent Items

- John Smith
- ABC Shop
- test user
- Leanne Tomlin
- Edward Stamos
- Acme
- Global Media - 400

Recycle Bin

Help for this Page Step 1 of 1

Exercise: Create 2 new Contacts and merge them.

- Remember to include the word "Test" in the name if you don't have any real Contact to create.



Salesforce.com New User Training: Working the Deal

Contact: Sue Someone ~ x

https://na17.salesforce.com/003c00000001voan

salesforce 14

Search... Search Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Contacts Opportunities Reports Dashboards Products +

Create New... Recent Items

- Sue Someone
- ABC Shop - 400 widgets 12/14
- John Smith
- ABC Shop
- Leanne Tomlin
- Edward Stamos
- Acme

Recycle Bin

Contact Sue Someone

Customize Page | Printable View | Help for this Page

Status [0] | Campaign History [0]

Org Chart

States

Opportunity Naming Convention

FAX Home Phone Last Stay-in-Touch Request Date

Other Phone Last Stay-in-Touch Save Date

Assistant Birthdate

Chat



Contact: Sue Someone ~ x

https://na17.salesforce.com/003c00000001voan

salesforce 14

Search... Search

Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Contacts Opportunities Reports Dashboards Products +

Create New... Recent Items

- Sue Someone
- ABC Shop – 400 widgets 12/14
- John Smith
- ABC Shop
- Leanne Tomlin
- Edward Stamos
- Acme

Recycle Bin

Contact Sue Someone

Show Feed Back to List

Contact Details

Address Book

Additional Information

Fax

Home Phone

Other Phone

Assistant

Lead Source

Last Stay-in-Touch Request Date

Last Stay-in-Touch Save Date Birthdate

Customize Page | Printable View | Help for this Page

Status [0] | Campaign History [0]

Org Chart

United States

Chat

Unique and meaningful name for every Opportunity

Contact: Sue Someone ~ x

https://na17.salesforce.com/003c00000001voan

salesforce 14

Search... Search Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Contacts Opportunities Reports Dashboards Products +

Create New... Recent Items Contact Sue Someone Show F Back to L Email Status [0] | Campaign History [0]

Sue Someone ABC Shop – 400 widgets 12/14 John Smith ABC Shop Leanne Tomlin Edward Stamos Acme

Recycle Bin

Contact Address Additional

Account - Name and quantity of the primary product of interest Month/year of close date

Fax Home Phone Lead Source Last Stay-in-Touch Request Date

Other Phone Last Stay-in-Touch Save Date

Assistant Birthdate

[View Org Chart] United States

Chat

The screenshot shows a Salesforce contact record for 'Sue Someone'. The contact details include a phone number (400 widgets), an email address (john.smith@abcshop.com), and a birthdate (12/14). The page has a navigation bar with links like Home, Chatter, Files, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, Products, and a 'Create New...' button. On the left, there's a sidebar with 'Recent Items' and a 'Recycle Bin' section. The main content area displays the contact's information with a large callout bubble highlighting the definition of an account.

Contact: Sue Someone ~ x

https://na17.salesforce.com/003c00000001voan

salesforce 14

Search... Search Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Contacts Opportunities Reports Dashboards Products +

Create New... Recent Items

- Sue Someone
- ABC Shop - 400 widgets 12/14
- John Smith
- ABC Shop
- Leanne Tomlin
- Edward Stamos
- Acme

ABC Shop - 400 widgets 12/14

Contact Sue Someone

Show P « Back to List

Contact

Address

Additional Information

Fax	Lead Source
Home Phone	Last Stay-in-Touch Request Date
Other Phone	Last Stay-in-Touch Save Date
Assistant	Birthdate

Chat

The screenshot shows a Salesforce contact record for 'Sue Someone'. The contact's name is displayed at the top left. A large, semi-transparent callout bubble is overlaid on the page, centered on the contact's name and the prominent red text 'ABC Shop - 400 widgets 12/14' which is displayed below it. The rest of the contact details, such as address and additional information, are visible but dimmed by the callout.

Contact: Sue Someone ~ x

https://na17.salesforce.com/003c00000001voan

salesforce 14

Search... Search

Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Contacts Opportunities Reports Dashboards Products +

Create New...

Contact Sue Someone

Show Feed

Customize Page | Printable View | Help for t

Sue Someone

ABC Shop – 400 widgets 12/14

John Smith

ABC Shop

Leanne Tomlin

Edward Stamos

Acme

Recent Items

Recycle Bin

Best Practice: Create Opportunities from Contact records

Contact Detail

Address Information

Additional Information

Fax

Home Phone

Other Phone

Assistant

Lead Source

Last Stay-in-Touch Request Date

Last Stay-in-Touch Save Date

Birthday

TML Email Status [0] | Campaign History [0]

[View Org Chart]

United States

Chat

The screenshot shows a Salesforce contact record for 'Sue Someone'. The main title 'Best Practice: Create Opportunities from Contact records' is displayed prominently in a large, bold, dark blue font within a rounded rectangular callout box. The contact record itself has a light blue header and contains sections for 'Contact Detail', 'Address Information', and 'Additional Information'. It lists various details such as fax numbers, phone numbers, and lead source information. On the left side, there is a sidebar with a 'Recent Items' list containing links to other contacts and accounts. The overall layout is clean and professional, characteristic of the Salesforce user interface.

Opportunity Edit New Op x

https://na17.salesforce.com/006/e?lookupcmpgn=1&retURL=%2F003o0000001voan&accid=001o0000002loAE&conid=003o0000001voan

salesforce 14

Search... Search Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Opportunities Reports Dashboards Products +

Create New... Help for this Page

Recent Items

- Sue Someone
- ABC Shop - 400 widgets 12/14
- John Smith
- ABC Shop
- Leanne Tomlin
- Edward Stamos
- Acme

Recycle Bin

Opportunity Edit Opportunity Information = Required Information

Opportunity Owner	Joe User	Close Date	11/30/2014 [5/23/2014]
Opportunity Name	ABC Shop - 200 widgets	Stage	Value Proposition
Account Name	ABC Shop	Probability (%)	45
Type	--None--	Amount	5k
Primary Campaign Source		Dealer	

Additional Information

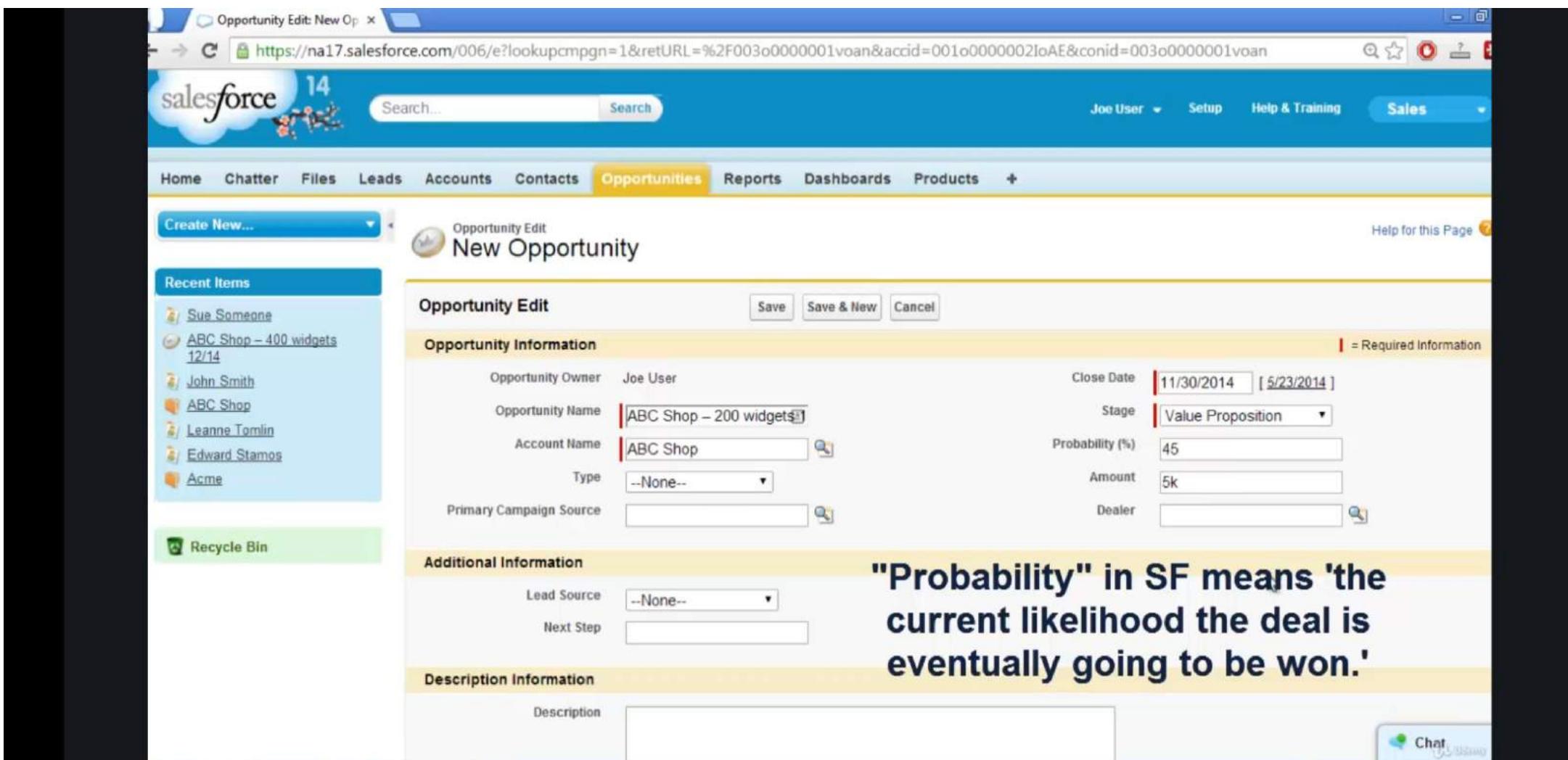
Lead Source	--None--
Next Step	

Description Information

Description	
-------------	--

"Probability" in SF means 'the current likelihood the deal is eventually going to be won.'

Chat



Contact Roles for ABC Shop – 200 widgets 11/14

Contact Roles for ABC Shop – 200 widgets 11/14

Primary	Contact	Role
	No Primary Contact	
<input checked="" type="radio"/>	Sue Someone	Decision Maker
<input type="radio"/>	John Smith	--None--
<input type="radio"/>		--None--
<input type="radio"/>		Business User
<input type="radio"/>		Decision Maker
<input type="radio"/>		Economic Buyer
<input type="radio"/>		Economic Decision Maker
<input type="radio"/>		Evaluator
<input type="radio"/>		Executive Sponsor
		Influencer
		Technical Buyer
		Other

If you see a name here, but no role, it won't show on the Opportunity record, for anyone except the primary. You must add a role.

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Chat

Opportunity Edit New Op x

https://na17.salesforce.com/006/e?lookupcmpgn=1&retURL=%2F003o0000001voan&accid=001o0000002loAE&conid=003o0000001voan

salesforce 14

Search... Search Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Opportunities Reports Dashboards Products +

Create New... Help for this Page

Recent Items

- Sue Someone
- ABC Shop - 400 widgets 12/14
- John Smith
- ABC Shop
- Leanne Tomlin
- Edward Stamos
- Acme

Recycle Bin

Opportunity Edit Opportunity Information = Required Information

Opportunity Owner	Joe User	Close Date	11/30/2014 [5/23/2014]
Opportunity Name	ABC Shop - 200 widgets	Stage	Value Proposition
Account Name	ABC Shop	Probability (%)	50
Type	--None--	Amount	5k
Primary Campaign Source		Dealer	

Additional Information

Lead Source	--None--
Next Step	

Description Information

Description	
-------------	--

Chat

Opportunity Edit New Op x

https://na17.salesforce.com/006/e?lookupcmpgn=1&retURL=%2F003o0000001voan&accid=001o0000002loAE&conid=003o0000001voan

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Home Chatter Files Leads Accounts Opportunities Reports Dashboards Products +

Create New... Help for this Page

Recent Items

- Sue Someone
- ABC Shop - 400 widgets 12/14
- John Smith
- ABC Shop
- Leanne Tomlin
- Edward Stamos
- Acme

Recycle Bin

Opportunity Edit Opportunity Information = Required Information

Opportunity Owner	Joe User	Close Date	11/30/2014 [5/23/2014]
Opportunity Name	ABC Shop - 200 widgets	Stage	Value Proposition
Account Name	ABC Shop	Probability (%)	50
Type	--None--	Amount	5k
Primary Campaign Source		Dealer	

Additional Information

Lead Source	--None--
Next Step	

Description Information

Description	
-------------	--

Chat

Opportunity Edit New Op x

https://na17.salesforce.com/006/e?lookupcmpgn=1&retURL=%2F003o0000001voan&accid=001o0000002loAE&conid=003o0000001voan

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Search... Search Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Opportunities Reports Dashboards Products +

Create New... Help for this Page

Recent Items

- Sue Someone
- ABC Shop - 400 widgets 12/14
- John Smith
- ABC Shop
- Leanne Tomlin
- Edward Stamos
- Acme

Recycle Bin

Opportunity Edit Opportunity Information = Required Information

Opportunity Owner	Joe User	Close Date	11/30/2014 [5/23/2014]
Opportunity Name	ABC Shop - 200 widgets	Stage	Value Proposition
Account Name	ABC Shop	Probability (%)	45
Type	--None--	Amount	5k
Primary Campaign Source		Dealer	

Additional Information

Lead Source	--None--
Next Step	

Description Information

Description	
-------------	--

"Probability" in SF means 'the current likelihood the deal is eventually going to be won.'

Chat

Add Products to: ABC Shop - 200 widgets 11/14

<https://na17.salesforce.com/oppitm/multilineitem.jsp>

salesforce 14

Search... Search Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Contacts Opportunities Reports Dashboards Products +

Create New... Add Products to ABC Shop – 200 widgets 11/14 Help for this Page

Recent Items

- ABC Shop – 200 widgets 11/14
- Sue Someone
- ABC Shop – 400 widgets 12/14
- John Smith
- ABC Shop
- Leanne Tomlin
- Edward Stamos

Recycle Bin

Add products to this opportunity from **Standard Price Book** price book.

Product	Quantity	Sales Price	Date [5/23/2014]	Line Description
Widgets	200	100.00		

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Waiting for 3umps3-c1-was.salesforce.com...

Chat

Opportunity: ABC Shop - x

https://na17.salesforce.com/006o00000023oTu

Edit | Del [See Someone](#) ABC Shop DECISION MAKER

Partners [New](#) Partners Help ?

No records to display

Competitors [New](#) Competitors Help ?

No records to display

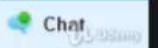
Exercise: Create an Opportunity record, entering a value in the Amount field

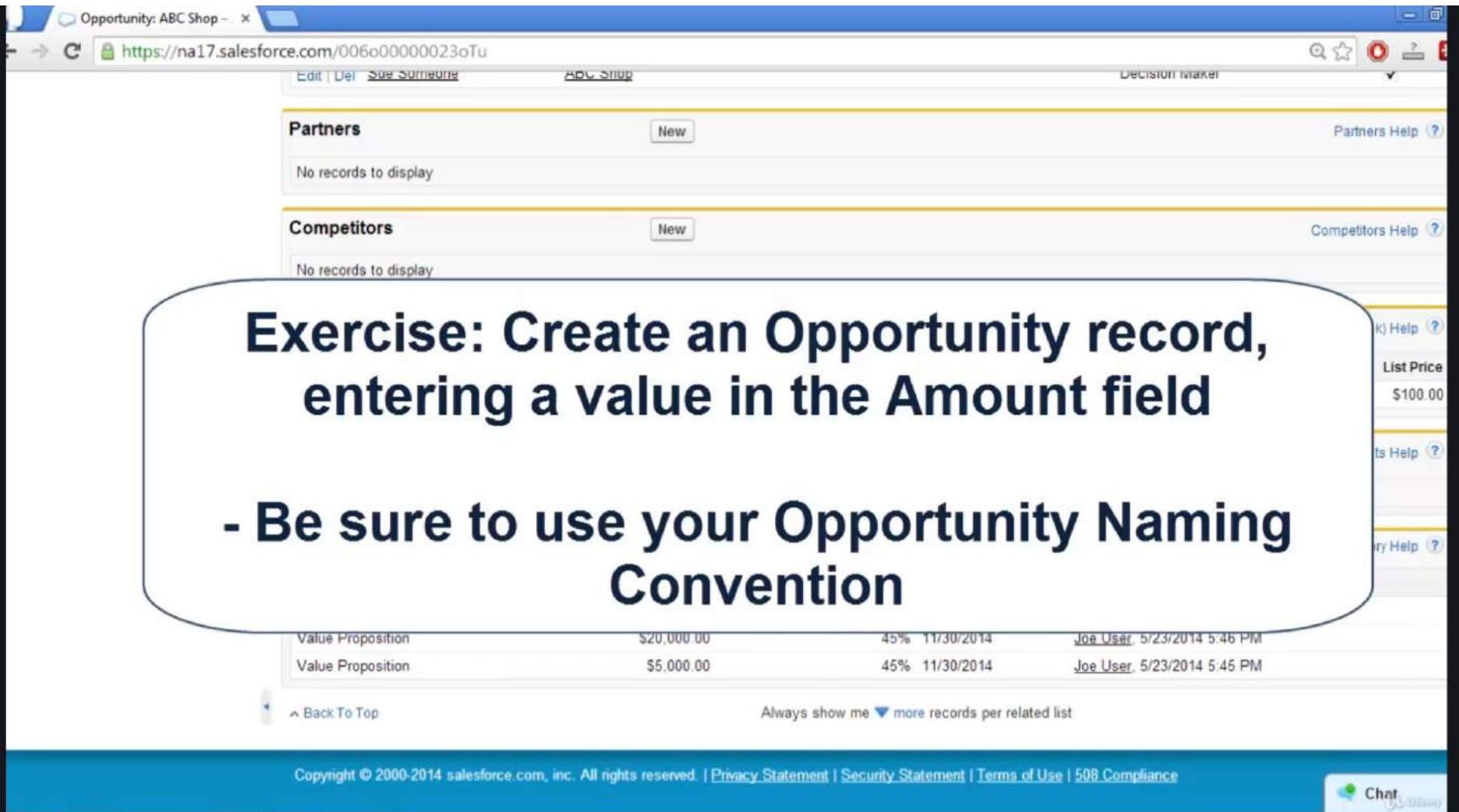
- Be sure to use your Opportunity Naming Convention

Value Proposition	\$20,000.00	45% 11/30/2014	Joe User, 5/23/2014 5:46 PM
Value Proposition	\$5,000.00	45% 11/30/2014	Joe User, 5/23/2014 5:45 PM

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

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Chat 



Drag from top and touch the back button to
exit full screen.



Salesforce.com New User Training: **Using and Scheduling Products**



With Products

Quantify Sales

Track relative strength of each product

See patterns in customer behavior

And more...

Opportunity: Acme - 600 | x Relative Product Value - x https://na17.salesforce.com/006c0000002MELL

Opportunity Detail

Opportunity Owner: Joe User [Change]

Opportunity Name: Acme - 600 Widgets

Close Date: 12/15/2014

Stage: Needs Analysis

Primary C

Additional Info

System Info

Products

No records to display

Open Activities

New Task New Event

No records to display

Activity History

Log a Call Mail Merge Send an Email

Service Contract to be paid in monthly installments for a year

Recycle Bin

Products Help ?

Open Activities Help ?

Chat

The screenshot shows a Salesforce Opportunity record for 'Acme - 600 Widgets'. The record details include:

- Opportunity Owner: Joe User [Change]
- Opportunity Name: Acme - 600 Widgets
- Close Date: 12/15/2014
- Stage: Needs Analysis

A large blue callout bubble is overlaid on the page, containing the text:

Service Contract to be paid in monthly installments for a year

The sidebar on the left lists various opportunities and a Recycle Bin section.

Add Products to: Acme - 600 Widgets

Relative Product Value

<https://na17.salesforce.com/oppitm/multilineitem.jsp>

salesforce 14

Joe User Setup Help & Training Sales

Home Chatter Files Campaigns Accounts Contacts Opportunities Reports Dashboards +

Create New... Shortcut Unresolved Items

Recent Items

- Acme - 600 Widgets
- Acme
- Acme - 200 Widgets
- ABC Shop – 400 widgets 12/14
- test
- Howard Jones
- Edward Stamos
- ABC Shop
- Global Media
- salesforce.com Inc.

Add Products to Acme - 600 Widgets

Add products to this opportunity from Standard Price Book price book.

Product	Quantity	Sales Price	Date [5/31/2014]	Line Description
Service Contract	1	20,000.00		
Widgets	600	100.00		

Save Save & More Cancel

Save Save & More Cancel

Chat



Salesforce.com New User Training: Changing Your Tabs

Hello, Joe User! ~ salesfor

https://na17.salesforce.com/ui/setup/Setup?setupid=PersonalSetup

salesforce 14

Search... Search Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Contacts Opportunities Products Reports Dashboards +

Quick Find

Hello, Joe User! Help for this Page

My Settings

- Personal
- Display & Layout
- Customize My Tabs
- Customize My Pages
- My Social Accounts and Contacts
- Accessibility
- Email

Personal Setup is now My Settings

Now all your personal setup options are right here on the My Settings page—with a new organization to make them easier to find and manage.

Looking for [App & Administration Setup](#)?

Quick Links

Manage my Chatter email notifications Chat

https://na17.salesforce.com/p/setup/layout/ConfigureMyTabs?retURL=%2Fui%2Fsetup%2FSetup%3Fsetupid%3DDisplayAndLayout&setupid=CustomizeTabs

Customize My Tabs ~ sale

https://na17.salesforce.com/p/setup/layout/ConfigureMyTabs?retURL=%2Fui%2Fsetup%2FSetup%3Fsetupid%3DDisplayAndLayout&setupid=Customize1

salesforce 14

Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Contacts Opportunities Products Reports Dashboards +

Quick Find

Customize My Tabs Help for this Page

Choose the tabs that will display in each of your apps.

Custom App: Sales

My Settings

Personal

Display & Layout

Customize My Tabs

Customize My Pages

My Social Accounts and Contacts

Accessibility

Email

Chat

Available Tabs

- Campaigns
- Cases
- Console
- Contracts
- Data.com
- Documents
- Google AdWords Setup
- Groups
- Ideas
- People
- Price Books

Add Remove

Selected Tabs

- Home (default)
- Chatter
- Files
- Leads
- Accounts
- Contacts
- Opportunities
- Products
- Reports
- Dashboards

Up Down

This screenshot shows the 'Customize My Tabs' page in the Salesforce setup. The left sidebar lists various settings like Personal, Display & Layout, and Email. The main area is titled 'Customize My Tabs' and asks to choose tabs for the current app, which is set to 'Sales'. On the left, a list of 'Available Tabs' includes Campaigns, Cases, Console, Contracts, Data.com, Documents, Google AdWords Setup, Groups, Ideas, People, and Price Books. On the right, a list of 'Selected Tabs' includes Home (default), Chatter, Files, Leads, Accounts, Contacts, Opportunities, Products, Reports, and Dashboards. There are 'Add' and 'Remove' buttons between the two lists, and 'Up' and 'Down' buttons to rearrange the selected tabs.

Sys Admin must enable a feature before you can decide whether or not to use it.

Import

Work.com



Change my password

Personal > [Change My Password](#)



Manage my Chatter email notifications

Chatter > [Email Notifications](#)



My Email Settings ~ salesf

https://na17.salesforce.com/p/email/UserEmailPrefEdit?retURL=%2Fui%2Fsetup%2FSetup%3Fsetupid%3DEmailSetup&setupid=EmailSettings

salesforce 14

Joe User Setup Help & Training Sales

Home Chatter Files Leads Accounts Contacts Opportunities Products Reports Dashboards +

Quick Find

Help for this Page

My Settings

Outgoing Email Settings

How would you like your name to appear on your outgoing email?

Email Name = Required Item

What email address would you like to use as your return address?

Email Address

Would you like to automatically BCC emails to your return address?

Automatic Bcc Yes No

This signature will be added to your outgoing emails (1333 characters max):

Email Signature

It's a good idea to send emails from SF records whenever possible.

Chat

Subscriptions

Search... Search

Joe User

Setup

Help & Training

Sales

14

Help for this Page

My Settings

Outgoing Email Settings

How would you like your name to appear on your outgoing email?

Email Name = Required Item

What email address would you like to use as your return address?

Email Address

Would you like to automatically BCC emails to your return address?

Automatic Bcc Yes No

This signature will be added to your outgoing emails (1333 characters max):

Email Signature

It's a good idea to send emails from SF records whenever possible.

Chat

Subscriptions

Search... Search

Joe User

Setup

Help & Training

Sales

14

Managing Activities

>Overview 

- **Types of Activities**

1. Tasks
2. Call Logging
3. Events
4. Email

- **Types of Related Lists**

1. Open Activities
2. Activity History

Open Activities

[New Task](#) [New Event](#) [New Meeting Request](#)

Open Activities Help [?](#)

No records to display

Activity History

[Log a Call](#) [Mail Merge](#) [Send an Email](#) [Request Update](#)

Activity History Help [?](#)

No records to display

Managing Activities

>Overview



Contact,
Account, and
Oppty, plus all
other standard
object records

- **Types of Activities**
 1. Tasks
 2. Call Logging
 3. Events
 4. Email

- **Types of Related Lists**
 1. Open Activities
 2. Activity History

Open Activities

New Task New Event New Meeting Request

Open Activities Help ?

No records to display

Activity History

Log a Call Mail Merge Send an Email Request Update

Activity History Help ?

No records to display

Contact: John Smith

Activities

New Task vs. Log a Call

New Task

Task Edit

Save Save & New Task Save & New Event Cancel

Task Information

Assigned To: Joe User Related To: Opportunity

Subject: Name: Contact • John Smith

Due Date: 5/25/2014

Comments:

Additional Information

Status: Not Started Phone:

Priority: Normal Email: jsmith@email.com

Log a Call

Task Edit

Save Cancel

Task Information

Assigned To: Joe User Related To: Opportunity

Subject: Call Name: Contact • John Smith

Due Date: 5/25/2014 Comments: 5/25/2014

Additional Information

Status: Completed Phone:

Email: jsmith@email.com

New Task

- Can Assign Task to Yourself
- Can Assign Task to Other Users
- Status is Open until marked as completed

Tip – Best Practice is to Log Activities against both the Contact & at least one other record (Account, Opportunity)

Log A Call

- Status Automatically Set to Completed
- Can Also Create a Follow Up Task if desired

Contact: John Smith ~ sal Task: New Task ~ salesfor

https://na17.salesforce.com/00T/e?who_id=003o0000001voa5&retURL=%2F003o0000001voa5

Home Chatter Files Campaigns Accounts Contacts Opportunities Reports Dashboards +

Create New... Shortcut Unresolved Items

Recent Items

- John Smith
- Jon Amos
- Carole White
- Geoff Minor
- Leanne Tomlin
- Sue Someone
- ABC Shop – 400 widgets
12/14
- ABC Shop
- Joe User
- ABC Shop – 200 widgets
11/14

Recycle Bin

New Task

Task Edit

Save Save & New Task Save & New Event Cancel

Task Information

= Required Information

Assigned To: Joe User Related To: Opportunity

Subject: Due Date: Comment:

Additional Information

Select a Subject below.

- Call
- Send Letter
- Send Quote
- Other

Priority: Normal

Send Notification Email

Recurrence

Phone: Email: jsmith@email.com

Chat

A screenshot of the Salesforce 'New Task' page. The page has a blue header with navigation links like Home, Chatter, Files, etc. On the left, there's a sidebar with 'Recent Items' and a 'Recycle Bin'. The main area shows a 'Task Edit' form with fields for Assigned To (set to 'Joe User'), Subject (empty), Due Date (empty), and Comment (empty). A dropdown menu is open over the 'Subject' field, titled 'Select a Subject below.' It contains four options: 'Call', 'Send Letter', 'Send Quote', and 'Other'. At the bottom of the dropdown, it says 'Additional Information'. There are also buttons for Save, Save & New Task, Save & New Event, and Cancel. A status bar at the bottom shows 'Phone' and 'Email: jsmith@email.com'. A 'Chat' button is in the bottom right corner.

Contact: John Smith ~ sal X Contact: John Smith ~ sal X

https://na17.salesforce.com/003c00000001voa5

Recycle Bin Home Phone Last Stay-in-Touch Request Date

Other Phone Last Stay-in-Touch Save Date

Assistant Birthdate

Asst. Phone Description Department

New - Google Chrome https://na17.salesforce.com/ui/core/activity/ActivityReminder

Sample alert

Start Time: 5/25/2014 11:15 AM
Reminder Time: 5/25/2014 11:00 AM

Type Subject Reminder

Action Subject Sample alert 10 minutes overdue

Dismiss Dismiss All Snooze 5 minutes

Open Activities

Request Open Activities Help ?

Date Status Priority Assigned To

3/2014 Not Started Normal Joe User

Request Update Activity History Help ?

Opportunities New Opportunity Opportunities Help ?

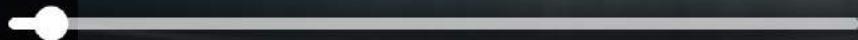
Action Opportunity Name Stage Amount Close Date

Edit Del ABC Shop – 200 widgets 11/14 Id. Decision Makers \$20,000.00 11 Chat



Salesforce.com New User Training: Events and Emails

0:07 / 9:21



Calendar: New Event ~ sa | Calendar: New Event ~ sa

https://na17.salesforce.com/00U/e?who_id=003o0000001voa5&retURL=%2F003o0000001voa5

salesforce 14

Search... Search Joe User Setup Help & Training Sales

Home Chatter Files Campaigns Accounts Contacts Opportunities Reports Dashboards +

Create New... ▾

Shortcut

Unresolved Items

Recent Items

- John Smith
- ABC Shop – 400 widgets 12/14
- ABC Shop
- Joe User
- ABC Shop – 200 widgets 11/14
- Sue Someone
- Leanne Tomlin

0:38 / 9:21

Recycle Bin

Calendar New Event

Event Edit

Save Save & New Task Save & New Event Cancel

Calendar Details | = Required Information

Assigned To	Joe User <input type="button" value=""/>	Related To	Opportunity <input type="button" value=""/>
Subject	<input type="text"/>	Name	Contact <input type="button" value=""/> John Smith <input type="button" value=""/> [Add to Invittees]
All-Day Event	<input type="checkbox"/>	Private	<input type="checkbox"/>
Start	5/25/2014 4:00 PM [3:48 PM]	End	5/25/2014 5:00 PM [3:48 PM]

Other Information

Location	<input type="text"/>	Phone	<input type="button" value=""/>
Show Time As	Busy <input type="button" value=""/>	Email	jsmith@email.com

Description Information

Chat

Calendar: New Event ~ sa | Calendar: New Event ~ sa

https://na17.salesforce.com/00U/e?who_id=003o0000001voa5&retURL=%2F003o0000001voa5

salesforce 14

Search... Search Joe User Setup Help & Training Sales

Home Chatter Files Campaigns Accounts Contacts Opportunities Reports Dashboards +

Create New... Shortcut Unresolved Items

Help for this Page

New Event

Event Edit Save Save & New Task Save & New Event Cancel

Calendar Details = Required Information

Assigned To: Joe User Related To: Opportunity

Subject: Name: Contact John Smith [Add to Invitees]

All-Day Event: Private

Start: 5/25/2014 4:00 PM [3:48 PM] End: 5/25/2014 5:00 PM [3:48 PM]

**Unlike Tasks,
Events have both
a Start date/time
and end date/time**

Other Information

Location: Phone: Email: jsmith@email.com

Show Time As: Busy

Recycle Bin Chat

14

Calendar: New Event ~ sa | Calendar: New Event ~ sa

https://na17.salesforce.com/00U/e?who_id=003o0000001voa5&retURL=%2F003o0000001voa5

End | 5/25/2014 | 5:00 PM [3:48 PM]

Other Information

Location:
Show Time As: Busy

Phone: Email: jsmith@email.com

Description Information

Description:

Recurrence

Create Recurring Series of Events

Frequency:

Daily Every weekday
 Weekly Every day(s)
 Monthly Yearly

Start Date: 5/25/2014 [5/25/2014]

End Date: [Calculate max end date] [i](#)

Reminder

Reminder:

Chat [View Log](#)

Calendar: New Event ~ sa | Calendar: New Event ~ sa | https://na17.salesforce.com/00U/e?retURL=%2F00U%2Fc%3Fmd0%3D2014%26md3%3D150&aid=005o0000000DxSQ&anm=Joe+User&evt4=5%2F3C

New Event

Event Edit

Save Save & New Task Save & New Event Cancel

Calendar Details | = Required Information

Assigned To: Joe User Related To: Opportunity
Subject: Name: Contact [Add to Invitees]
All-Day Event: Private:
Start: 5/30/2014 8:00 AM [3:51 PM] End: 5/30/2014 9:00 AM [3:51 PM]

Other Information

Location: Phone:
Show Time As: Busy Email:

Description Information

Description:

Chat 

Shortcut
Unresolved Items
Recent Items
John Smith
ABC Shop – 400 widgets
12/14
ABC Shop
Joe User
ABC Shop – 200 widgets
11/14
Sue Someone
Leanne Tomlin
Recycle Bin

Activities



Task

Send an Email

[Send](#)

[Select Template](#)

[Attach File](#)

[Check Spelling](#)

[Cancel](#)

Edit Email

Email Format [Text-Only \[Switch to HTML \]](#)

To [\[\]](#) [\[\]](#)

Related To

[\[\]](#)

Additional To:

CC:

BCC:

Subject

Body

Dear John,

I really enjoyed speaking with you today. I look forward to our next meeting.

Regards, Joe

- An Email can be associated to – a Contact or Lead, plus – an Account, Oppty, etc.

- Email Templates standardize outbound communications, merging values from fields on the record to automatically personalize.

- You can see when someone reads your emails when on their Contact record

- Can include attachments of up to 10 MB total

Calendar: New Event ~ 5d | Task: Send an Email ~ sales | https://na17.salesforce.com/_ui/core/email/author/EmailAuthor

Unresolved Items

Recent Items

- John Smith
- ABC Shop – 400 widgets
12/14
- ABC Shop
- Joe User
- ABC Shop – 200 widgets
11/14
- Sue Someone
- Leanne Tomlin

Edit Email

Email Format: **HTML** [[Switch to Text-Only](#)]

To: John Smith [\[Edit\]](#) [\[Search\]](#)

Related To: Account [\[Edit\]](#) ABC Shop [\[Search\]](#)

Additional To: [\[Search\]](#)

CC: [\[Search\]](#)

BCC: aspiretech@live.com [\[Search\]](#)

Subject: Following up on our discussion today

Body

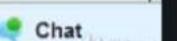
Formatting Controls [[How to use this](#)]

Font [\[Font dropdown\]](#) Size [\[Size dropdown\]](#) [\[Text color\]](#) [\[Text style\]](#) [\[Text bold\]](#) [\[Text italic\]](#) [\[Text underline\]](#) [\[Text align left\]](#) [\[Text align center\]](#) [\[Text align right\]](#) [\[Text align justify\]](#)

Dear John,

I really enjoyed speaking with you today. I think that AspiraTech has a lot to offer ABC Shop and I look forward to our next meeting.

Regards, Joe

Chat 

Calendar: New Event ~ sal X Contact: John Smith ~ sal X

https://na17.salesforce.com/003o0000001voa5

Request Date
Other Phone Last Stay-in-Touch Save Date
Assistant Birthdate
Asst. Phone Department
Description

▼ System Information

Joe User, 5/23/2014 2:18 PM
[Send Gmail](#)

[Open Activities Help](#) ?

Priority Assigned To
Joe User

[Activity History Help](#) ?

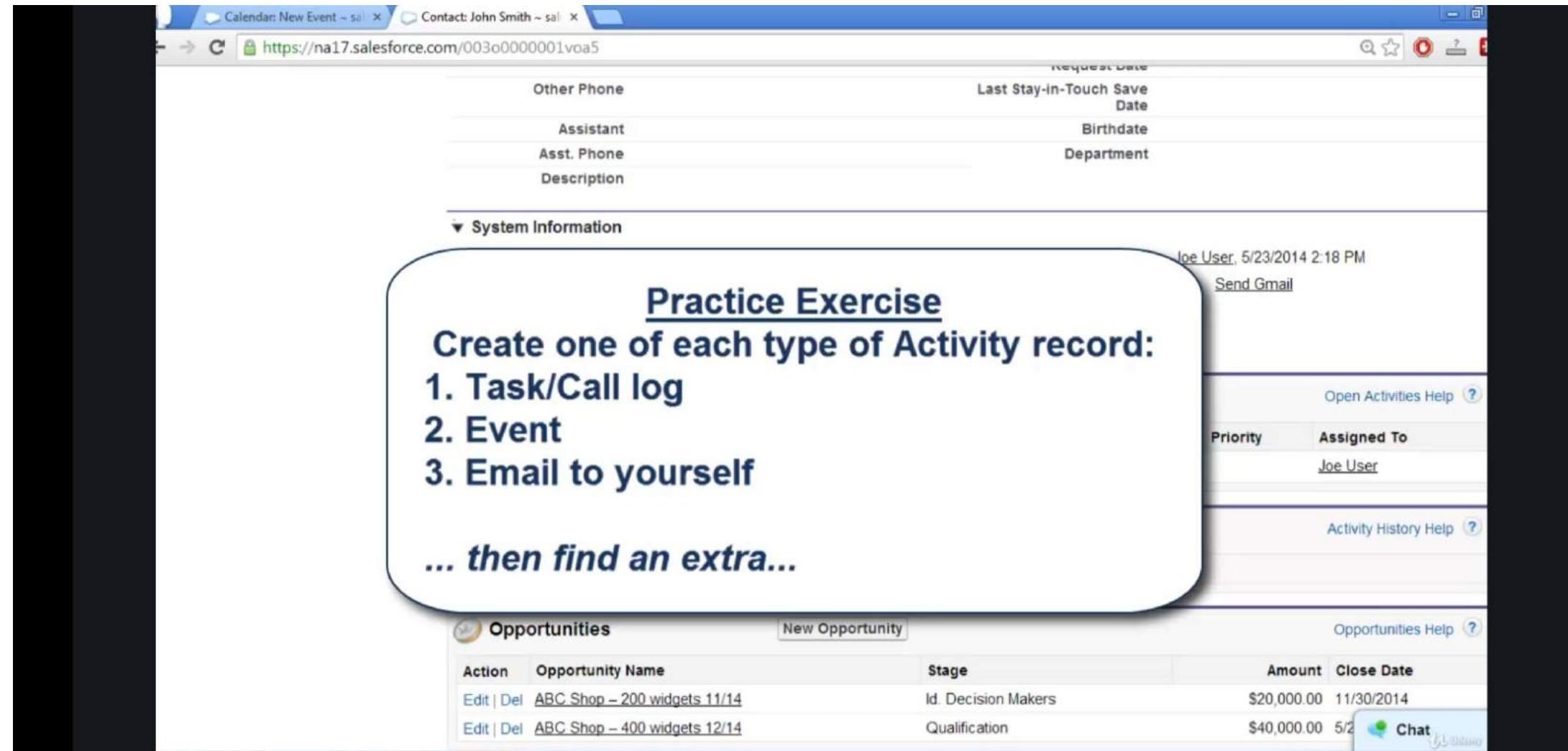
Practice Exercise
Create one of each type of Activity record:
1. Task/Call log
2. Event
3. Email to yourself

... then find an extra...

Opportunities New Opportunity Opportunities Help ?

Action	Opportunity Name	Stage	Amount	Close Date
Edit Del	ABC Shop – 200 widgets 11/14	Id. Decision Makers	\$20,000.00	11/30/2014
Edit Del	ABC Shop – 400 widgets 12/14	Qualification	\$40,000.00	5/2

Chat





Salesforce.com New User Training: **List Views & Reports**



Salesforce.com New User Training:

Scenario: Invite all your Contacts who are in NYC to meet you for coffee while you're in town next week.

List View Limitations

1. Can't mix together fields from different objects

Name	Status	User	Phone
Howard Jones	Starred	Smith	(415) 555-1212
Edward Stamos	Available	Acme	(212) 555-5555
ABC Shop	Available	ABC Shop	
Global Media	Available		
salesforce.com Inc.	Available		
salesforce.com Canada Corporation	Available		
test User	Available		
John Smith	Available		
Jon Amos	Available		
Carole White	Available		

List View Limitations

2. Charts can only be created off Reports

Name	Phone	Company
Howard Jones	(415) 555-1212	Acme
Edward Stamos	(212) 555-5555	ABC Shop
ABC Shop		
Global Media		
salesforce.com Inc		
salesforce.com Canada Corporation		
test User		
John Smith		
Jon Amos		
Carole White		
Someone, Sue		ABC Shop

Report Generation Status: Complete

Aspiratech Trainer | Joe User

Report Options:

Summarize information by: Opportunity Owner

Time Frame

Date Field: Close Date

Range: Custom

From: To:

Exercise: create a list view of all Accounts and filter it to only include Accounts with an Annual Revenue over \$50,000

Then navigate from the view to edit each record's description field to have "high value target" in it.

Salesforce Lightning New User Training: Navigation

https://na10.lightning.force.com/one/one.app#/home?t=1466195423622

Salesforce

Search Salesforce

Home

Opportunities

Leads

Tasks

Files

Notes

Accounts

Contacts

Campaigns

Dashboards

Reports

Feed

Quarterly Performance

As of Today 1:29 PM

CLOSED \$225,000 OPEN (>70%) \$0 GOAL \$250,000

100K
100K
0K
0

Apr May Jun

■ Closed ■ Goal ■ Closed + Open (>70%)

Upcoming Events

No events to show.

Today's Tasks

No tasks due today.

Recent Records

Top Deals

Assistant

This Opportunity Has Had No Activity for 30 Days

United Oil Installations

United Oil & Gas Corp. - 7/3/2016
- \$65,000.00



Question 3:

In the SFDC database, date values are stored in Fields. Collections of Fields are found on Records. And collections of Records are organized by Object, which are accessible by Tabs, and arranged in Apps.

True

False



New Lead: Select Lead Record Type

https://eu2.salesforce.com/setup/ui/recordtypeselect.jsp?ent=Lead&retURL=%2F00Q%2Fo&save_new_url=%2F00Q%2Fe%3FretURL%3D%252F00Q%252Fo

AIESEC Limburg Help & Training Sales

salesforce

Home Leads Companies Contacts Reports Dashboards +

Create New... Shortcut Unresolved Items Recent Items Tester Video Education Training Tester Video training AIESEC Limburg Recycle Bin

New Lead Select Lead Record Type

Select a record type for the new lead. To skip this page in the future, change your record type settings on your personal setup page.

Select Lead Record Type

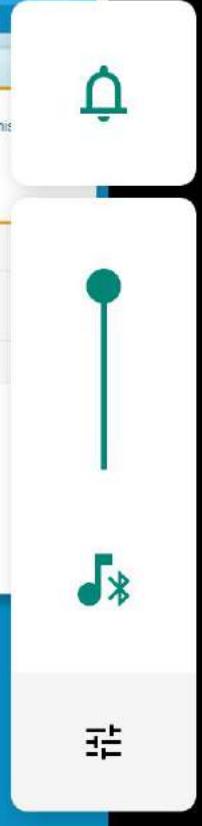
Record Type of new record Corporate Corporate Exchange Member Lead Continue Cancel

Available Lead Record Types

Record Type	Name	Description
Corporate		
Exchange		
Member Lead		

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Chat



Lead Edit: New Lead

<https://eu2.salesforce.com/00Q/e?retURL=%2F00Q%2Fo&RecordType=012b0000000E1C&ent=Lead>

salesforce

AIESEC Limburg Help & Training Sales

Home Leads Companies Contacts Reports Dashboards +

Create New... Shortcut Unresolved Items Recent Items Tester Video Education Training Tester Video training AIESEC Limburg Recycle Bin

Lead Edit New Lead

Lead Edit

Save Save & New Cancel

Lead Information

Lead Owner: AIESEC Limburg

First Name: [Required]

Last Name:

Company:

Title:

What is record type: 012b0000000E1C

Lead Status: Open

Phone:

Email:

Address Information

Street:

City:

State/Province:

Zip/Postal Code:

Country:

Website:

Additional Information

No. of Employees:

Annual Revenue:

Lead Source: [Required]

Industry:

Description Information

Description:

Chat

Lead: Lead test ~ sā

<https://eu2.salesforce.com/00Qb0000001RXoe>

Shortcut

Unresolved Items

Recent Items

- Lead test
- Tester Video
- Education
- Training
- Tester
- Video training
- AIESEC Limburg

Recycle Bin

Lead Detail

Lead Owner: AIESEC Limburg [Change]

Name: Lead test

Company: Video test

Title: HR Director

What is record type: 012b0000000E1C

Lead Status: Open

Phone:

Email: national@aiesec.be

Address Information

Address

Website

Additional Information

No. of Employees

Annual Revenue

Description

Created By: AIESEC Limburg, 30/01/2013 16:38

Last Modified By: AIESEC Limburg, 30/01/2013 16:38

Lead Source: External Referral

Industry: Education

Custom Links

[Google Search](#)

[Google News](#)

[Google Maps](#)

[Hoovers Profile](#)

[Send Gmail](#)

Open Activities

New Task

New Event

New Meeting Request

Open Activities Help ?

Chat

Followers

No followers.

Share

Write something...

Sort by: Most Recent Activity ▾

There are no updates.

< Back to List: My Unresolved Items

Open Activities (0) | Activity History (0) | HTML Email Status (0) | Campaign History (0)

Edit Find Duplicates Convert Lead

Edit Find Duplicates Convert Lead

No records to display

Salesforce 13

Search... Search

David Craig White Help & Training Sales

Home Accounts Contacts Leads Reports VR Email +

Expand All | Collapse All

Q Quick Find

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
 - Home
 - Activities
 - Leads
 - Accounts
 - Contacts
 - Opportunities

Fields

- Validation Rules
- Contact Roles
- Competitors
- Page Layout
- Field Sets
- Search Layouts
- Buttons, Links, and Actions New!
- Limits
- Big Deal Alert

- Cases
- Salesforce to Salesforce
- Users
- Salesforce CRM Content
- Tags
- Reports & Dashboards

Opportunity

New Custom Field

Step 2. Enter the details Step 2 of 3

Previous Next Cancel

Field Label: Custom Lead Field

Please enter the maximum length for a text field below.

Length: 60

Field Name: Custom_Lead_Field

Description: test

Help Text: test

Required: Always require a value in this field in order to save a record.

Unique: Do not allow duplicate values.
 Treat "ABC" and "abc" as duplicate values (case insensitive)
 Treat "ABC" and "abc" as different values (case sensitive)

External ID: Set this field as the unique record identifier from an external system

Default Value: Show Formula Editor

Use formula syntax, e.g.: Text in double quotes: "Hello"; Number: 25; Percent as decimal: 0.10; Date expression: Today() + 7

Chat

Page Layout
 Field Sets
 Search Layouts
 Assignment Rules
 Settings
 Buttons, Links, and Actions [New!](#)
 Limits
 Web-to-Lead

Accounts
 Contacts
 Opportunities
 Fields
 Validation Rules
 Contact Roles
 Competitors
 Page Layout
 Field Sets
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Cases
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 Users
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 Tags
 Reports & Dashboards
 Search
 Chatter
 Social Accounts and Contacts
 User Interface

Create
 Develop
 Schema Builder
 Installed Packages
 AppExchange Marketplace
 Critical Updates

Administration Setup
 Manage Users
 Manage Apps
 Company Profile
 Security Controls
 Communication Templates
 Translation Workbench

	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Last Transfer Date	LastTransferDate	Date	
Edit	Lead Owner	Owner	Lookup(User,Queue)	
Replace Edit	Lead Source	LeadSource	Picklist	
Replace Edit	Lead Status	Status	Picklist	
Edit	Mobile	MobilePhone	Phone	
	Name	Name	Name	
Edit Replace	Salutation	Picklist		
	First Name	Text(40)		
	Last Name	Text(80)		
Edit	No. of Employees	NumberOfEmployees	Number(8, 0)	
Edit	Phone	Phone	Phone	
Replace Edit	Rating	Rating	Picklist	
Edit	Title	Title	Text(128)	
Edit	Website	Website	URL(255)	

Lead Custom Fields & Relationships

New Map Lead Fields Field Dependencies

Lead Custom Fields & Relationships Help [?](#)

Action	Field Label	API Name	Data Type	Controlling Field	Modified By	Track History
Edit Del	Contact Notes	Contact_Notes__c	Long Text Area(32768)		David Craig White, 08-05-2013 15:22	
Edit Del Replace	Current CRM	Current_CRM__c	Picklist		David Craig White, 11-02-2013 20:28	
Edit Del	Custom Lead Field	Custom_Lead_Fieldx__c	Text(60)		David Craig White, 04-07-2013 16:22	
Edit Del	Direct Line	Direct_Line__c	Text(60)		David Craig White, 08-05-2013 15:10	
Edit Del	Email 2	Email_2__c	Email		David Craig White, 19-01-2013 11:15	
Edit Del	Enquiry message	Enquiry_message__c	Text(200)		David Craig White, 11-02-2011 21:54	
Edit Del	G+ Profile	G_Profile__c	URL(255)		David Craig White, 24-05-2013 09:12	
Edit Del Replace	Lead Type	LeadType__c	Picklist		David Craig White, 08-02-2011 10:52	
Edit Del	LinkedIn	LinkedIn__c	URL(255)		David Craig White, 22-09-2012 22:15	
Edit Del	Main Pain	Main_Pain__c	Text(255)		David Craig White, 11-02-2013 20:39	
Edit Del	No. of Sales People	No_of_Sales_People__c	Number(18, 0)		David Craig White, 24-05-2013 09:57	
Edit Del Replace	Objection	Objection__c	Picklist		David Craig White, 19-01-2013 11:29	
Edit Del	Opportunity Notes	Opportunity_Notes__c	Long Text Area(32768)		David Craig White, 08-05-2013 15:21	
Edit Del Replace	Role in Decision	Role_in_Decision__c	Picklist		David Craig White, 19-01-2013 11:19	
Edit Del Replace	Service Type	Service__c	Picklist		David Craig White, 11-02-2013 20:22	
Edit Del	Skype	Skype_Address__c	Text(20)		David Craig White, 11-02-2013 20:17	
Edit Del	Twitter	Twitter_Address__c	URL(255)		David Craig White, 11-02-2013 20:17	
Edit Del	Value Proposition	Value_Proposition__c	Text(255)		David Craig White, 11-02-2013 20:40	
Edit Del Replace	Website CMS	Website_CMS__c	Picklist		David Craig White, 11-02-2013 20:36	

Untitled Screenshot 21

Chat



Force.com Home Page X Convert Lead: Prajka Bhor X

https://prajka-dev-ed-dev-ed.my.salesforce.com/lead/leadconvert.jsp?retURL=%2F00Q2800000PtHE4&id=00Q2800000PtHE4&_CONFRIMATIONTOKEN=VmPf

Person 1

16

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Employee Plans Authentication Upload Docs Orders Cases Products +

Google Talk

Google Talk within Salesforce is no longer available.

Google is constantly changing and evolving their technology infrastructure. As a result of these changes the Google Talk sidebar is no longer available within Salesforce.

For alternative ways to use Google Talk click [here](#).

Create New...

Shortcut

Unresolved Items

Recent Items

Prajka Bhor
Tom James
Norm May
IND vs New Zealand
Prajka Bhor
Bertha Boxer

Recycle Bin

Convert Lead Prajka Bhor Help for this Page ?

Leads can be converted to accounts, contacts, opportunities, and followup tasks. You should only convert a lead once you have identified it as qualified. After this lead has been converted, it can no longer be viewed or edited as a lead, but can be viewed in lead reports.

Convert **Cancel**

Convert Lead ! = Required Information

Record Owner: Prajka Bhor

Send Email to the Owner:

Account Name: Create New Account: Paragyte

Opportunity Name: Paragyte- Test Do not create a new opportunity upon conversion.

Converted Status: Closed - Converted

Task Information

Subject: Other

Due Date: 10/13/2016 [10/13/2016]

Priority: Low

Status: In Progress

Description Information

Comments:

Chat

Force.com Home Page X Convert Lead: Prajka Bhor X

https://prajka-dev-ed-dev-ed.my.salesforce.com/lead/leadconvert.jsp?retURL=%2F00Q2800000PtHE4&id=00Q2800000PtHE4&_CONFEIRMATIONTOKEN=VmPf

salesforce '16

Search... Search

Prajka Bhor Setup Help Sales

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Employee Plans Authentication Upload Docs Orders Cases Products +

Google Talk

Convert Lead Prajka Bhor Help for this Page

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Create New...

Shortcut

Unresolved Items

Recent Items

Prajka Bhor
Tom James
Norm May
IND vs New Zealand
Prajka Bhor
Bertha Boxer

Convert Lead

Record Owner: Prajka Bhor

Send Email to the Owner:

Account Name: Create New Account: Paragyte View

Opportunity Name: Paragyte- Test

Do not create a new opportunity upon conversion.

Converted Status: Closed - Converted

= Required Information

Task Information

Subject: Other

Due Date: 10/13/2016 [10/13/2016]

Status: In Progress

Priority: Low

Description Information

Comments:

Chat