

Salesforce Guide – Searching, Editing and Creating Contacts and Accounts

This document explains the full process for searching, editing and creating new contacts and accounts in Salesforce.

Salesforce is AECOM'S client relationship management system which is a very powerful tool when used correctly. We must make sure that we each follow this process carefully when entering new data into the system to avoid creating duplicate records or entering incorrect information.

Please always make sure that any data you are inputting into the system is correct and up to date.

If AECOM Contacts (such as senior management; Directors, Principals etc) pass on client business cards when returning from business trips/conferences/workshops etc then the information given is current and likely to be correct. However if you are given a client list pulled from Outlook please be careful. You will need to make sure that the information has been checked by the AECOM Contact to be sure that it is not out of date information.

Please use Google and Linked-in when unsure of correct information. We should never add out of date information to Salesforce, if updated information is required, clients should be contacted by the AECOM Contact.

If you have any queries please contact your local Salesforce superuser.

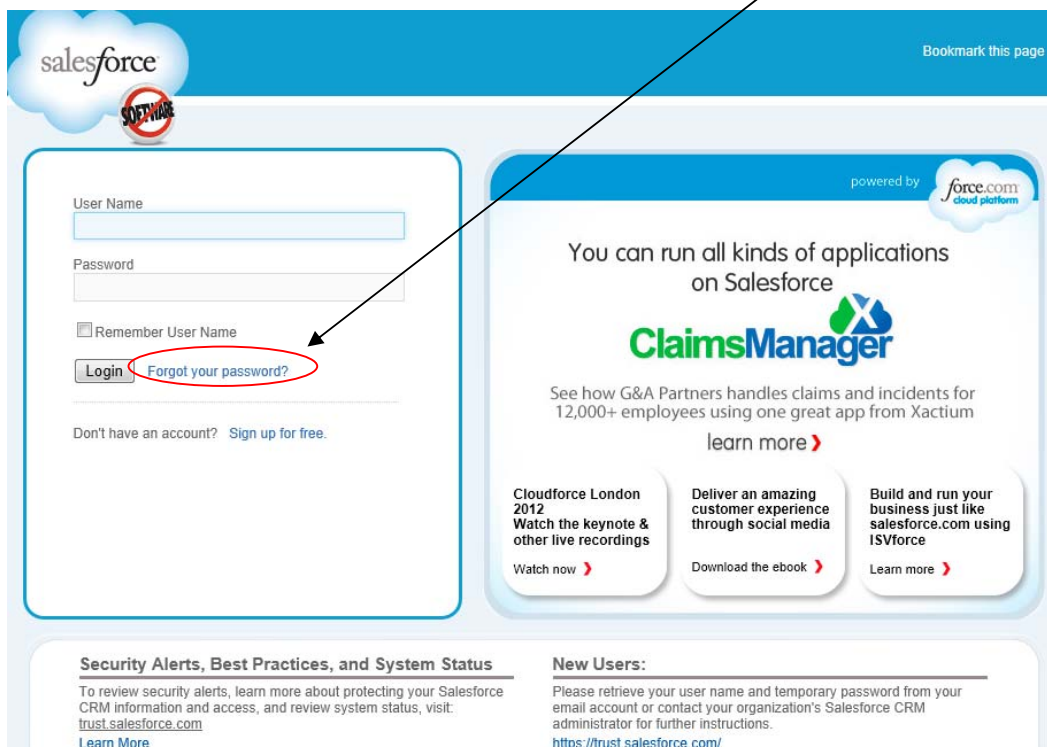
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Logging In

You must have a Salesforce license in order to search edit and add data in Salesforce.

Your email address (firstname.lastname@aecom.com) is your User Name. You should know your password, however if you have forgotten your password you can select the “Forgot your password?” link.



The screenshot shows the Salesforce login interface. On the left, there is a login form with fields for 'User Name' and 'Password', a 'Remember User Name' checkbox, and a 'Login' button. A red circle highlights the 'Forgot your password?' link next to the 'Login' button, with an arrow pointing to it from the text above. Below the login form is a link to 'Sign up for free'. On the right, there is a promotional banner for 'ClaimsManager' powered by 'force.com cloud platform'. The banner includes the text 'You can run all kinds of applications on Salesforce' and 'See how G&A Partners handles claims and incidents for 12,000+ employees using one great app from Xactium'. Below the banner are three promotional cards: 'Cloudforce London 2012', 'Deliver an amazing customer experience through social media', and 'Build and run your business just like salesforce.com using ISVforce'. At the bottom, there are two sections: 'Security Alerts, Best Practices, and System Status' and 'New Users:'. The 'New Users' section includes instructions on how to retrieve a user name and temporary password.

salesforce

Bookmark this page

powered by force.com cloud platform

User Name

Password

☐ Remember User Name

Login [Forgot your password?](#)

Don't have an account? [Sign up for free.](#)

You can run all kinds of applications on Salesforce

ClaimsManager

See how G&A Partners handles claims and incidents for 12,000+ employees using one great app from Xactium

[learn more >](#)

Cloudforce London 2012
Watch the keynote & other live recordings
[Watch now >](#)

Deliver an amazing customer experience through social media
[Download the ebook >](#)

Build and run your business just like salesforce.com using ISVforce
[Learn more >](#)

Security Alerts, Best Practices, and System Status
To review security alerts, learn more about protecting your Salesforce CRM information and access, and review system status, visit: trust.salesforce.com
[Learn More](#)

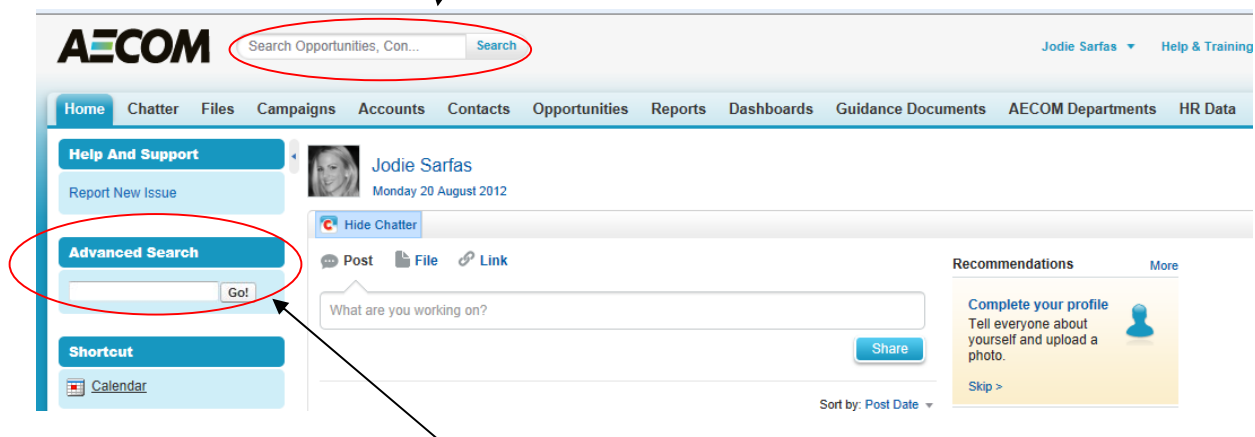
New Users:
Please retrieve your user name and temporary password from your email account or contact your organization's Salesforce CRM administrator for further instructions.
<https://trust.salesforce.com/>

Searching for a Contact

When given the details of a new client contact (business card or outlook contact etc) you must always check if they are already on the system before creating a new contact.

Once you are logged into Salesforce you will automatically be directed to the home page. There is a search bar at the top left corner of the page.

This is where you can search for an existing contact (client) or account (company). You can also search for opportunities (projects), notes, campaigns etc using this search bar.



There is also the option to run an Advanced Search. This will allow you to select a particular category to search:

Advanced Search

Search

Error: You must enter a value

Search

Advanced Options

☒ Use enhanced search capabilities [i](#)

☐ Limit to items I own

☐ Exact phrase

Scope

[Select All](#) | [Deselect All](#)

<input type="checkbox"/> Accounts	<input type="checkbox"/> Contacts	<input type="checkbox"/> Leads
<input type="checkbox"/> Opportunities	<input type="checkbox"/> Cases	<input type="checkbox"/> Case Comments
<input type="checkbox"/> Campaigns	<input type="checkbox"/> Tasks	<input type="checkbox"/> Events
<input type="checkbox"/> Notes	<input type="checkbox"/> Attachments	<input type="checkbox"/> Ideas
<input type="checkbox"/> Reports	<input type="checkbox"/> Users	<input type="checkbox"/> AECOM Departments
<input type="checkbox"/> AECOM Team	<input type="checkbox"/> Awards	<input type="checkbox"/> Business Lines
<input type="checkbox"/> Countries	<input type="checkbox"/> Go/No Go Conversation	<input type="checkbox"/> HR Data
<input type="checkbox"/> iContact Configurations	<input type="checkbox"/> iContact Sent Messages	<input type="checkbox"/> Issues
<input type="checkbox"/> States and Countries		

Example 1 – Adding Mr. Peter Murray at the company Wordsearch to Salesforce.

I have chosen to use the top search bar. I type “Peter Murray” and select enter.

Search Chatter Updates

peter murray Search Again Options...

Records

- Opportunities (1)
- Contacts (4)
- Accounts (0)
- HR Data (0)
- AECOM Team (0)
- Reports (0)
- AECOM Departments (0)
- Groups (0)
- Search All

Opportunities (1) Show Filters

Action	Opportunity Name	Opportunity ID#	Opportunity Record Type
Edit	Support for Water Resources, Hydraulic Modeling, Permitting & Environmental Compliance - Master Services Contract	OPP-20475	Project - North America

Contacts (4) Show Filters

Action	Name	Account Name	Status	Mailing Street	Mailing City
Edit	Mr Peter Murray	NLA	Active	The Building Centre, 26 Store Street, London, WC1E 7BT	
Edit	Mr Peter Murray	Wordsearch Communications	Active	91 Goswell Road	London
Edit	Mr Peter Murray	Crest Nicholson Plc	Active	Crest House, Pyrcroft Road	Chertsey
Edit	Mr Peter Murray	Jones Lang LaSalle HQ	Active	7 Stratford Place	London

Salesforce shows 4 contacts called Peter Murray. One of which is linked to Wordsearch Communications.

This is likely to be the same contact, however to double check I click on the contact name link to view the details.

Contact Detail Edit Delete Request Update Send Survey LinkedIn Search

Name	Mr. Peter Murray	Contact ID#	CON-125764
Suffix		Phone	020 7549 6600
Account Name	Wordsearch Communications	Fax	
Title	Director	Mobile	
Nickname		Home Phone	
Status	Active	Other Phone	
Need to Know		Email	peter@wordsearch.co.uk

If the details of an existing contact match the details of the contact you wish to input then it is likely to be the same person.

Useful information to look at is name, job title and the account details.

After cross referencing the details if necessary you should edit/update the information listed (email address etc) *see page 6*. However if the information is all correct then there is no need to make any updates.

Campaigns

If you find that a contact is linked to a campaign instead of an account please contact your local Salesforce Superuser.

Account Name	EUR PCC Campaign – Data
--------------	-------------------------

Adding an AECOM Contact to the AECOM Team field

If no updates are needed you will finally need to check that your AECOM Contact is listed in the AECOM Team field section in the contact.

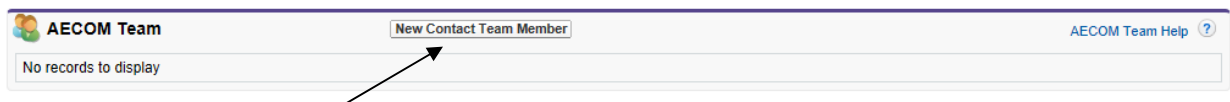
If not, it is important to add your AECOM contact to the existing contact in Salesforce for a number of reasons.

In Salesforce, AECOM Contact refers to the member of staff who knows the client.

The first reason is for reporting. Directors will often ask for a list of their external contacts; we can run a report using the AECOM Team information to filter a particular AECOM contact's client list.

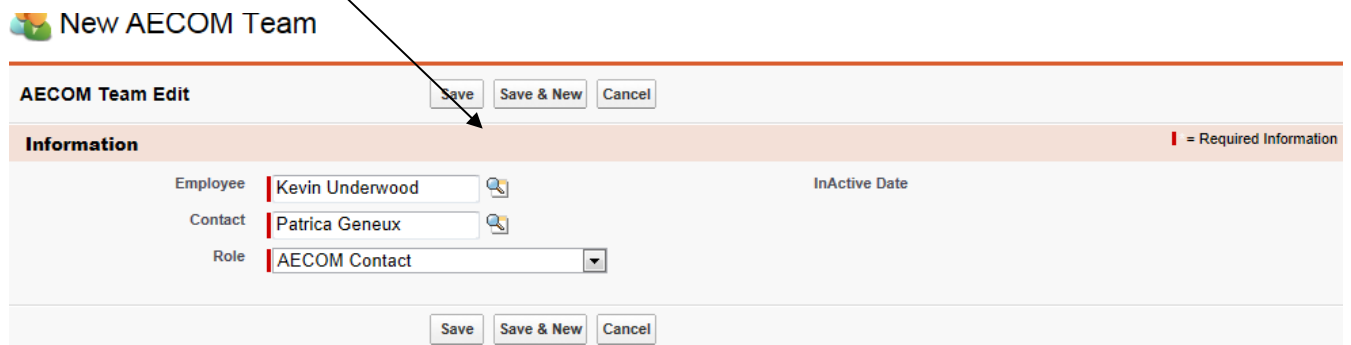
It is also beneficial for AECOM employees across different business lines to know if they have mutual external contacts with other AECOM employees. This will enable us to work together to build client relationships across business lines and build AECOM's reputation "One AECOM".

To add your AECOM Contact to the AECOM Team field you will need to scroll down to AECOM Team.



Select new contact Team Member.

Use the search icon to search for the correct AECOM Contact (employee). This is the person that you are entering the contact for. This will be a senior member of management in most cases.



Select **AECOM Contact** from the role drop down menu and select save.

Editing a Contact or Account

If the information you have been given does not match the information in Salesforce then you should make the necessary update(s) and select save. You should have already checked that the information you have been given is up to date however if necessary you can check the information with the AECOM Contact and by using Google/Linked-in etc.

Pay careful attention when updating email addresses and mailing addresses as we use this information for important mailings and invitations etc.

For example 1 (Peter Murray) I will update the existing contact with the details I have been given from my AECOM Contact.

After searching and finding the correct existing contact select the name link of the field that you wish to update.

The screenshot shows the Salesforce interface with a search bar containing 'peter murray'. The search results are divided into two sections: Opportunities (1) and Contacts (4). A black arrow points from the 'Mr. Peter Murray' link in the first row of the Contacts table to the 'Search Results' header.

Search Results

Search Chatter Updates: Search Again Options...

Records

- Opportunities (1)
- Contacts (4)
- Accounts (0)
- HR Data (0)
- AECOM Team (0)
- Reports (0)
- AECOM Departments (0)
- Groups (0)

[Search All](#)

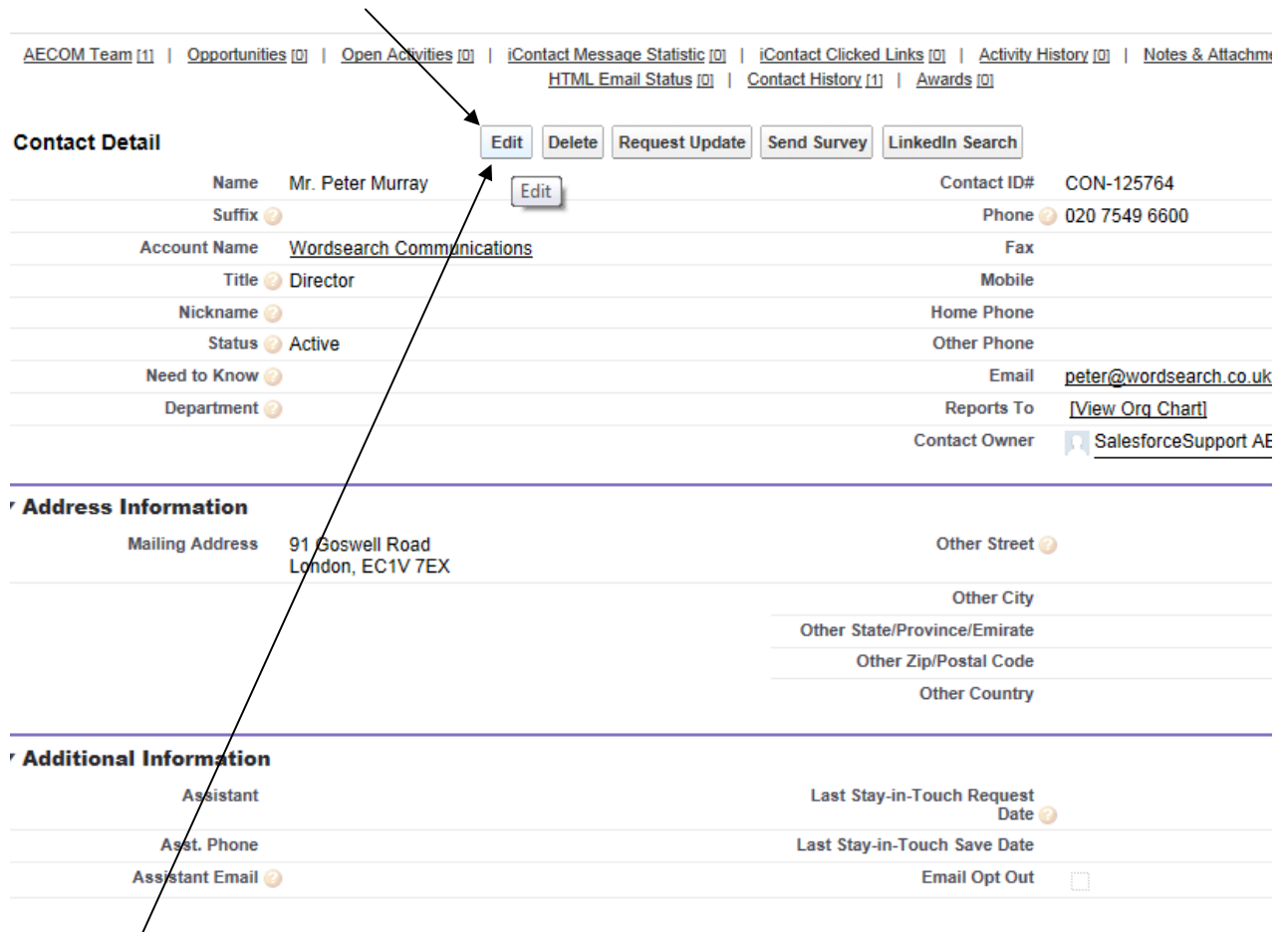
Opportunities (1) Show Filters

Action	Opportunity Name	Opportunity ID#	Opportunity Record Type
Edit	Support for Water Resources, Hydraulic Modeling, Permitting & Environmental Compliance - Master Services Contract	OPP-20475	Project - North America

Contacts (4) Show Filters

Action	Name	Account Name	Status	Mailing Street	Mailing City
Edit	Mr. Peter Murray	NLA	Active	The Building Centre, 26 Store Street, London, WC1E 7BT	
Edit	Mr. Peter Murray	Wordsearch Communications	Active	91 Goswell Road	London
Edit	Mr. Peter Murray	Crest Nicholson Plc	Active	Crest House, Pymcroft Road	Chertsey
Edit	Mr. Peter Murray	Jones Lang LaSalle HQ	Active	7 Stratford Place	London

You will then need to select Edit.



The screenshot shows a contact management interface. At the top, there is a navigation bar with links: [AECOM Team \[1\]](#), [Opportunities \[0\]](#), [Open Activities \[0\]](#), [iContact Message Statistic \[0\]](#), [iContact Clicked Links \[0\]](#), [Activity History \[0\]](#), [Notes & Attachments \[0\]](#), [HTML Email Status \[0\]](#), [Contact History \[1\]](#), and [Awards \[0\]](#). Below this is the **Contact Detail** section. It contains a table with contact information and a row of action buttons: [Edit](#), [Delete](#), [Request Update](#), [Send Survey](#), and [LinkedIn Search](#). An arrow points from the text 'You will then need to select Edit.' to the [Edit](#) button. The contact information table includes fields for Name (Mr. Peter Murray), Suffix, Account Name (Wordsearch Communications), Title (Director), Nickname, Status (Active), Need to Know, Department, Contact ID# (CON-125764), Phone (020 7549 6600), Fax, Mobile, Home Phone, Other Phone, Email (peter@wordsearch.co.uk), Reports To (View Org Chart), and Contact Owner (SalesforceSupport AE). Below the Contact Detail section is the **Address Information** section, which includes fields for Mailing Address (91 Goswell Road, London, EC1V 7EX), Other Street, Other City, Other State/Province/Emirate, Other Zip/Postal Code, and Other Country. At the bottom is the **Additional Information** section, which includes fields for Assistant, Asst. Phone, Assistant Email, Last Stay-in-Touch Request Date, Last Stay-in-Touch Save Date, and Email Opt Out.

Contact Detail	
Name	Mr. Peter Murray
Suffix	
Account Name	Wordsearch Communications
Title	Director
Nickname	
Status	Active
Need to Know	
Department	
Contact ID#	CON-125764
Phone	020 7549 6600
Fax	
Mobile	
Home Phone	
Other Phone	
Email	peter@wordsearch.co.uk
Reports To	View Org Chart
Contact Owner	SalesforceSupport AE

Address Information	
Mailing Address	91 Goswell Road London, EC1V 7EX
Other Street	
Other City	
Other State/Province/Emirate	
Other Zip/Postal Code	
Other Country	

Additional Information	
Assistant	
Asst. Phone	
Assistant Email	
Last Stay-in-Touch Request Date	
Last Stay-in-Touch Save Date	
Email Opt Out	<input type="checkbox"/>

Select Edit and make the necessary changes.

Once the information has been updated select save at the bottom of the contact field shown above.

Please use this process when editing account information. If you need to edit account details you need to go into the account name link, select edit and make the necessary changes. Do not forget to select save.

Searching for a Contact via an Account + Searching for an Account

There are a few reasons you may wish to search for an account. You may be checking that the account does not already exist in Salesforce. You may be searching for an opportunity via the account or you may be searching for a contact via the account.

One reason you may wish to search for a contact or an opportunity via an account is due to spelling errors.

Sometimes if a contact/opportunity has an incorrect spelling of the name they will not be picked up in the initial search. However you should be able to find them under the account that they are linked to.

If you cannot find a contact in Salesforce using the search bar or the advanced search you should search for the company (account) that the contact works for to view all contacts linked to the account.

Example 2 – Searching for Patricia Geneux at Dedeman Hotels + Resorts International.

First try searching for the full name “Patricia Geneux” in the top search bar:

The screenshot shows the Salesforce search interface. At the top is a navigation bar with links: Home, Chatter, Files, Campaigns, Accounts, Contacts, Opportunities, Reports, Dashboards, and Guidance Doc. Below this is the 'Search Results' section. It features a search bar with the text 'patricia geneux' and buttons for 'Search Again', 'Options...', and 'Search Chatter Updates'. Below the search bar, there are tabs for 'Records' and 'Opportunities (0)'. A yellow warning box displays the message: 'No matches found. Try searching [patricia geneux*](#) (starts with)'.

If no matches are found try searching surname only (searching by first name would be too generic).

This screenshot shows the same Salesforce search interface as the previous one, but with the search bar containing the text 'geneux'. The 'Search Again' button is highlighted with a dashed border. The yellow warning box now displays the message: 'No matches found. Try searching [geneux*](#) (starts with)'.

If matches are still not found try searching the account (company) in order to view all contacts linked to the account, in this case “Dedeman Hotels + Resorts International”.

Type the company name in the search bar.

The screenshot shows a Salesforce search results page. The browser address bar displays the URL: https://na13.salesforce.com/_ui/common/search/client/ui/UnifiedSearchResults?sear. The page header includes the AECOM logo and a search bar with the text "Search Opportunities, Con...". The navigation menu contains links for Home, Chatter, Files, Campaigns, Accounts, Contacts, Opportunities, Reports, Dashboards, and Guidance Docum. The main section is titled "Search Results". On the left, there is a sidebar with "Search Chatter Updates" and a "Records" section listing various object counts: Opportunities (0), Contacts (0), Accounts (0), HR Data (0), AECOM Team (0), Reports (0), and AECOM Departments (0). The search input field contains "Dedeman Hotels + Resorts International". A yellow message box states: "No matches found. Try searching [Dedeman Hotels + Resorts International*](#) (starts with)." Below this, "Search Tips" are provided: "Your search term must have 2 or more characters.", "View [Chatter Updates Results](#).", and "Refine your search with wildcards and operators. [Tell me more](#)". A "Search All" button is located at the bottom right.

If nothing shows up try searching by only the first word or by using the starts with function (*). For example *Dedeman**

The screenshot shows the same Salesforce search results page, but with the search term "Dedeman*". The search results are displayed in two sections: "Opportunities (1)" and "Accounts (4)". The "Opportunities (1)" section has a "Show Filters" link and a table with the following data:

Action	Opportunity Name	Opportunity ID#	Opportunity Record Type	Account
Edit	Dedeman - Phase 1 Geochemical Exploration Survey	OPP-132428	Project - Europe	Sindhu Consult

The "Accounts (4)" section also has a "Show Filters" link and a table with the following data:

Action	Account Name	Street/PO Box	City
Edit	Dedeman		
Edit	Dedeman Holding		
Edit	Dedeman Madencilik		
Edit	Dedeman Mining		

If you are unsure if an account is the correct account you are searching for go into the account by selecting the account name link in order to view the account details:

Account Detail		Edit	
Account Name	Dedeman [View Hierarchy]	Type	Client/Prospect
Account Name in Local Language		Client ID#	ACC-95067
Parent Account		Phone	+ 90 212 337 39 00
Client Name Alias		Fax	+ 90 212 356 19 50
Former Client Name		Website	http://www.dedeman.com/us
Client Group	Industrial/Commercial	Global Key Account	
Market Sector	Leisure/Hospitality	Key Account Business Lines	PDD
Client Confidentiality Agrmt in effect?	Unknown	CAM Alliance Partner?	<input type="checkbox"/>
Client Master Service Agreement	Unknown	CAM Account Status	
Agreement expiration date		CAM Status Active?	<input type="checkbox"/>
Reach		Client policy on gifts?	
Region	None	Comments on gift policy	
Account Manager			
District Interest			

▼ Account Risk Factors	
D&B report date	Finance & Accounting Risks
D&B Rating	Performance Risks
MK Denial	Risk Notes
Legal Risks	

▼ Description Information	
Employees	
Annual Revenue	
Client Comments	
Description	

▼ Address Information	
Street/PO Box	Yıldız Posta Cad No : 52 Esentepe
City	İstanbul
State/Province/Emirate	
Zip/Postal Code	34394
Country	Turkey

There are useful fields you can look at to check if the account is the correct account that you are looking for. The key fields are:

- 1) Market Sector
- 2) Company website
- 3) Address information

I can see in this example that ACC-95067 (Dedeman) is the company that I am searching (Dedeman Hotel + Resorts International). I can tell this by checking the information listed above (Market Sector, Website, Address).

Therefore the account Dedeman should be used to search for Patricia Geneux.

Contacts (0) | Opportunities (0) | Partners/Competitors (0) | AECOM Team (0) | Open Activities (0) | Awards (Client) (0) | Awards (Presenting Organization) (0) | Activity History (0)

Notes & Attachments (0) | Account History (1)

Account Detail Edit

Account Name	Dedeman View Hierarchy	Type	Client/Prospect
Account Name in Local Language		Client ID#	ACC-95067
Parent Account		Phone	+ 90 212 337 39 00
Client Name Alias		Fax	+ 90 212 356 19 50
Former Client Name		Website	http://www.dedeman.com/us
Client Group	Industrial/Commercial	Global Key Account	
Market Sector	Leisure/Hospitality	Key Account Business Lines	PDD
Client Confidentiality Agrmt in effect?	Unknown	CAM Alliance Partner?	<input type="checkbox"/>
Client Master Service Agreement	Unknown	CAM Account Status	
Agreement expiration date		CAM Status Active?	<input type="checkbox"/>
Reach		Client policy on gifts?	
Region	None	Comments on gift policy	
Account Manager			
District Interest			

▼ Account Risk Factors

D&B report date	Finance & Accounting Risks
D&B Rating	Performance Risks
MK Denial	Risk Notes
Legal Risks	

▼ Description Information

Employees
Annual Revenue
Client Comments
Description

▼ Address Information

Street/PO Box	Yildiz Posta Cad No : 52 Esentepe
City	Istanbul
State/Province/Emirate	
Zip/Postal Code	34394
Country	Turkey

There is a toolbar above Account Detail which contains a link to the contacts linked to that particular account. There will be a number next to “Contacts” showing the number of contacts that are linked to that particular company. In this case, there are 0 contacts listed to Dedeman.

This means that Patricia Geneux is not linked to the company Dedeman, therefore a new contact should be created (see page 12).

At a later stage if you find out that you have created a duplicated contact you can email Salesforce.europe@aecom.com to have the duplicate record deleted.

Creating a New Contact

There are two ways to create a new contact. For Patricia Geneux I will create a new contact via the account.

Go into the account by selecting the account name link and scroll down to the Contacts section. Select New Contact.

The screenshot shows a 'Contacts' section with a header bar containing an 'Edit' button and a 'New Contact' button. Below the header, there is a message 'No records to display'.

This will bring up the entry form below:

The screenshot shows the 'New Contact' entry form. The form is divided into three sections: Contact Information, Address Information, and Additional Information. Fields marked with a red bar are mandatory.

Contact Information

First Name: --None--
Last Name: [Red Bar]
Suffix: [Red Bar]
Account Name: Dedeman
Title: [Red Bar]
Nickname: [Red Bar]
Status: Active
Need to Know: [Red Bar]
Department: [Red Bar]

Phone: [Red Bar]
Fax: [Red Bar]
Mobile: [Red Bar]
Home Phone: [Red Bar]
Other Phone: [Red Bar]
Email: [Red Bar]
Reports To: [Red Bar]
Contact Owner: Jodie Sarfas

Address Information

Mailing Street: [Red Bar]
Mailing City: [Red Bar]
Mailing State/Province: [Red Bar]
Mailing Zip/Postal Code: [Red Bar]
Mailing Country: [Red Bar]

Other Street: [Red Bar]
Other City: [Red Bar]
Other State/Province/Emirate: [Red Bar]
Other Zip/Postal Code: [Red Bar]
Other Country: Click lookup icon...

Additional Information

Assistant: [Red Bar]
Asst. Phone: [Red Bar]
Assistant Email: [Red Bar]

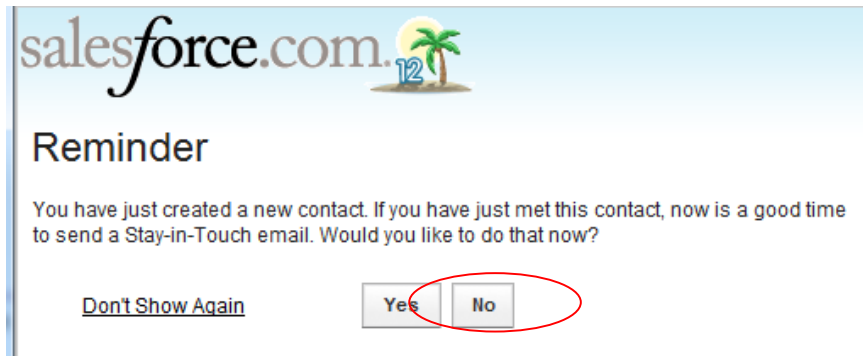
Email Opt Out: [Red Bar]

The fields marked with the red bar are mandatory.

Few fields are mandatory however it is important to always provide as much information as possible when creating new accounts or contacts. By providing as much information as possible it prevents other Salesforce users creating duplicated records as it makes searching for accounts/contacts much easier.

We require an email addresses and a mailing address for invites and mail shot purposes therefore if possible always complete these fields.

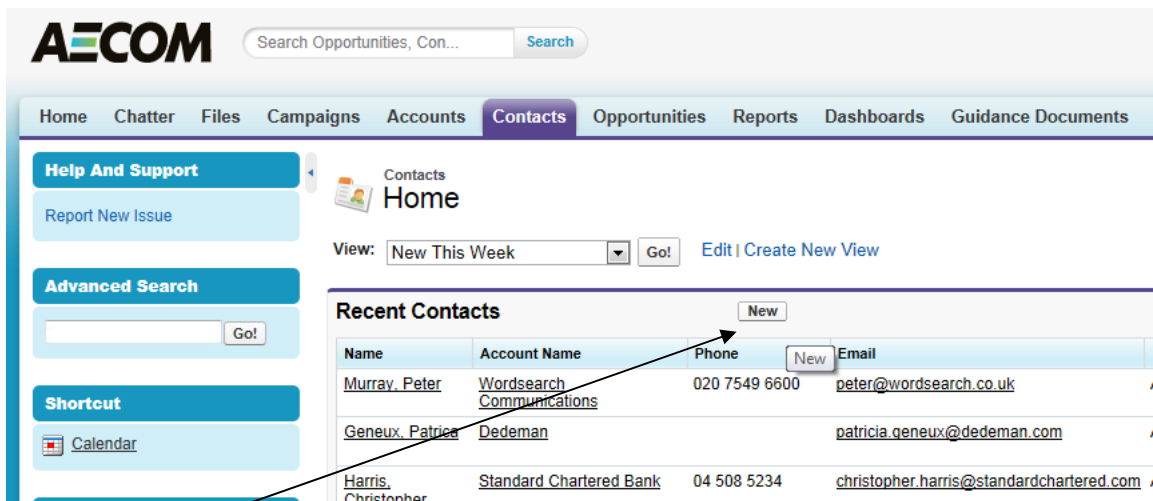
Once you have entered all of the information select save. This will bring up a reminder message:



Unless you have been instructed to send a stay in touch email (by the AECOM Contact that the new contact belongs to) select No.

Always remember to add your AECOM Contact to the AECOM Team field (see page 5).

Another option is to create a contact is via the contacts tab:



Select new in the contacts tab.

This will bring up the same entry form page for when you create a new contact via the account however the account name will be missing.

Contact Edit

New Contact

Help for this Page

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

Contact Edit

Save Save & New Cancel

Contact Information

= Required Information

First Name

--None--

Last Name

Suffix

Account Name

Title

Nickname

Status

Active

Need to Know

Department

Phone

Fax

Mobile

Home Phone

Other Phone

Email

Reports To

Contact Owner

Jodie Sarfas

Address Information

Mailing Street

Mailing City

Mailing State/Province

Mailing Zip/Postal Code

Mailing Country

Other Street

Other City

Other State/Province/Emirate

Other Zip/Postal Code

Other Country

Click lookup icon...

Additional Information

Assistant

Asst. Phone

Assistant Email

Assistant 2 Name

Asst 2 Phone

Email Opt Out

You will need to use the search icon to search for the existing/newly created account you wish to add the contact to. Account name is a mandatory field.

Creating a Private/Individual Account

If the client is an individual/self employed (for example when private individuals procure work from us) you will need to create an account for the individual.

The Client Group should be entered as "Private" and Market Sector as "Individual".

Please speak to your local Salesforce superuser if you have any queries.

Creating an Account

You must always search for the account on the system before adding a new account. (See “Searching for a Contact” *page 3* and follow the same process).

In this example I am searching for the account “The Conceptual Group”.

If you cannot find the account after searching by the full company name or by searching for a section of the company name then it is likely to be a new account:

conceptual

Search Accounts

Options...

Accounts (7)

Show Filters

My Columns

Action	Account Name	Street/PO Box	City	State/Province/Emirate	Country	Client ID#
Edit	RAKAA Properties	PO Box 16010 Riyadh 11464			Saudi Arabia	ACC-80518
Edit	The Connector Partnership				United States	ACC-35227
Edit	Malone Engineering	238, Blanchardstown Corporate Park 2 Ballycoolin	Dublin		Ireland	ACC-81562
Edit	Descon Engineering Services Ltd.	Suite 207, 8716 - 48 Avenue	Edmonton	Alberta	Canada	ACC-39259
Edit	Duncan Ross Architect	75 Main Street	Huntsville	Ontario	Canada	ACC-38791
Edit	Environmental Stewardship & Planning Inc.	1621 13th Street	Sacramento	California	United States	ACC-84019
Edit	Mequon, City of	11333 North Cedarburg Road 60W	Mequon	Wisconsin	United States	ACC-11421

Select the accounts tab, then select “new”

AECOM Search Opportunities, Con... Search

Home Chatter Files Campaigns **Accounts** Contacts Opportunities Reports Dashboards Guidance Documents AE

Help And Support
Report New Issue

Advanced Search
Go!

Shortcut

Accounts Home

View: All Accounts Go! Edit | Create New View

Recent Accounts

Account Name	Type	Street/PO Box	City
Dedeman	Client/Prospect	Yıldız Posta Cad No : 52	İstanbul

Similar to creating a new contact, when you select new Salesforce will bring up a new account entry form.


Please complete as much information as possible. Mandatory fields are marked red, however it is important to do your research and fill in as much information as possible.

Account Edit Save Save & New Cancel

Account Information ! = Required Information

Account Name


Account Name in Local Language

Parent Account 

Client Name Alias

Former Client Name

Client Group --None--


Market Sector --None-- 

Client Confidentiality Agmt in effect? Unknown

Client Master Service Agreement Unknown

Agreement expiration date [22/08/2012]

Reach --None--

Account Manager 

Type Available Competitor Subcontractor Chosen Client/Prospect

Phone

Fax

Website

Global Key Account --None--

Key Account Business Lines Energy Environment Geotechnical Government PCC Chosen

CAM Alliance Partner? Unknown

CAM Account Status --None--

CAM Status Active? Unknown

Client policy on gifts? --None--

Comments on gift policy

Here is a list of useful fields to fill in:

Parent Account – if the company’s parent account is listed in the system you should use the search icon to select and link the two accounts together. This will help when searching for opportunities/contacts belonging to that particular organisation.

Market Sector – we often run reports in Salesforce and will sometimes use this field to pull all contacts for a particular market. For example for Leisure and Culture we may want to pull all Leisure/Hospitality contacts. You must complete the mandatory field “Client Group” before completing the “Market Sector” field.

Website – This is a quick and easy way to cross reference information to work out if the existing account is the account that you are looking for.

Key Account Business Lines – This is where you can add your business line, it is possible to add multiple business lines. Select your business line and then use the > key to move into the chosen box. Make sure you select save after doing so.

Address Information – This is important information that should be completed and updated when necessary. We use address information for mailings etc.

Once you have completed as much information as possible select save.