# 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 You will need to make sure that the information has been checked by the AECOM Contact to be sure that it is not out of date information.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 We should never add out of date information to Salesforce, if updated information is required, clients should be contacted by the AECOM Contact.

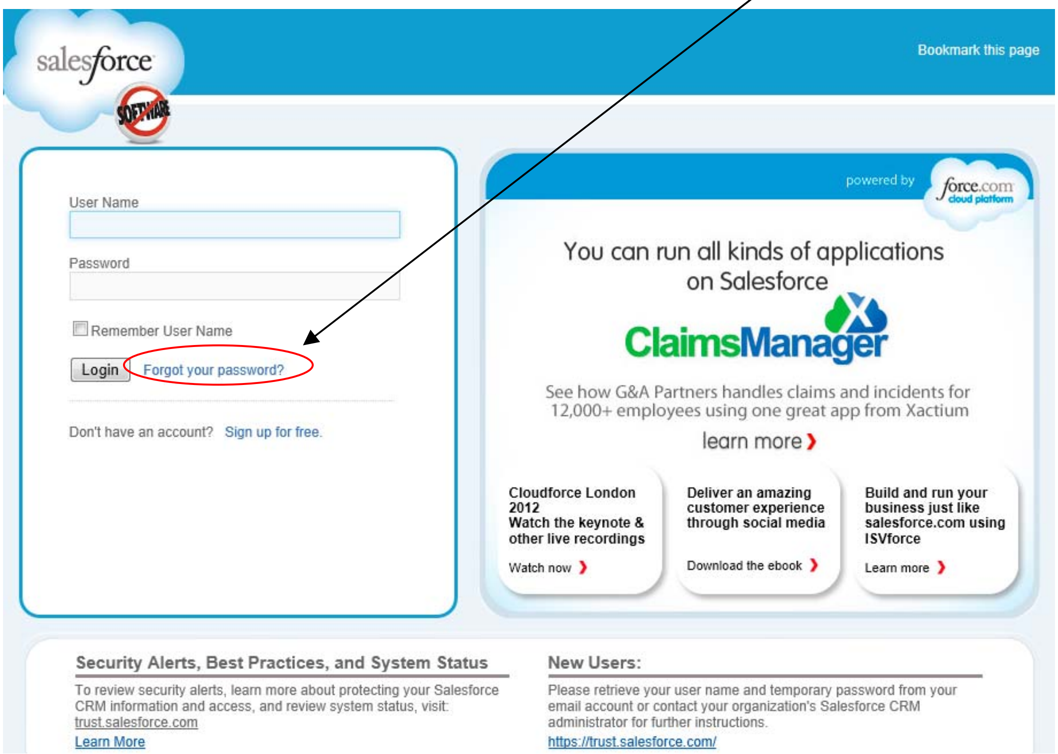
If you have any queries please contact your local Salesforce superuser.

## Guide Contents

## 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.

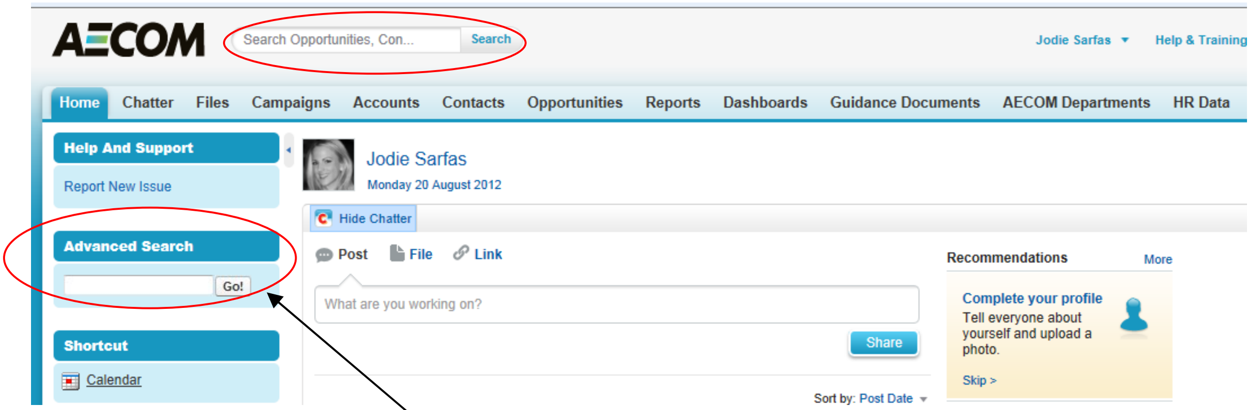


## **Searching for a Contact**

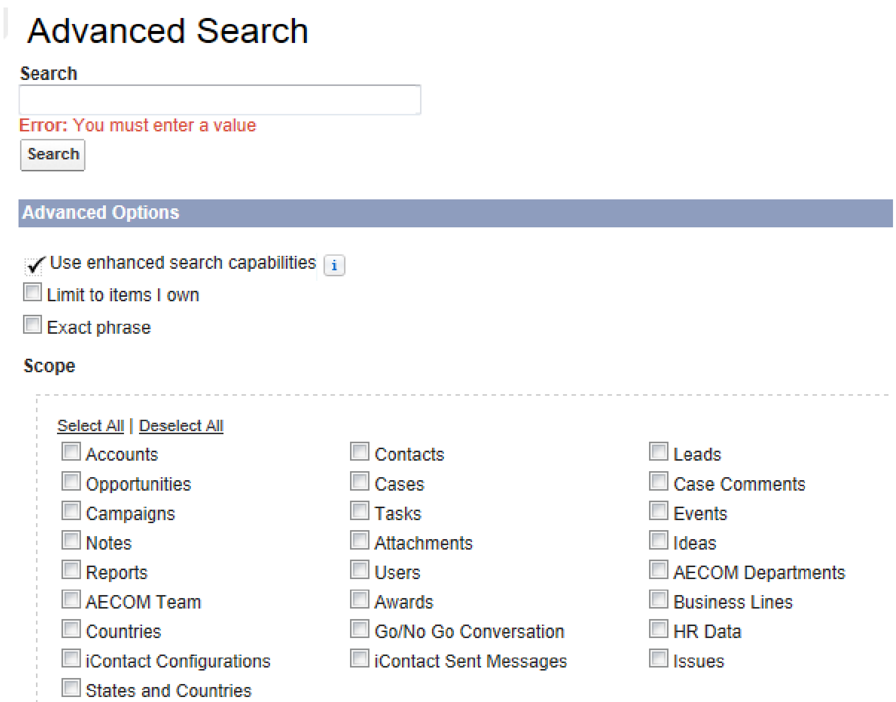
When given the details of a new client contact (business card or outlook contact etc) you must always check if they are already on the system before creating a new contact.

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.

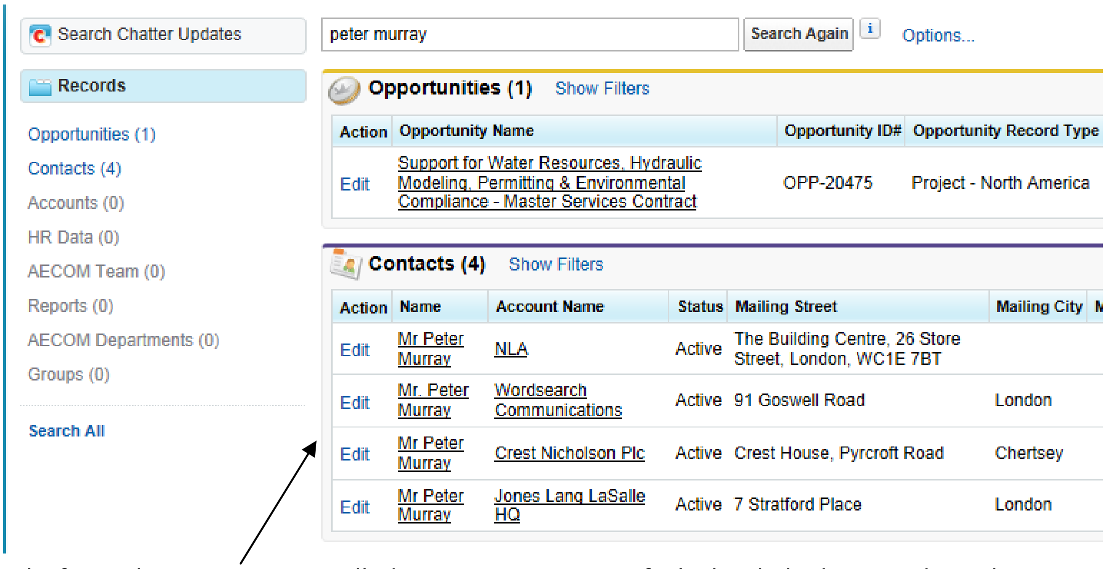



There is also the option to run an Advanced Search. This will allow you to select a particular category to search:



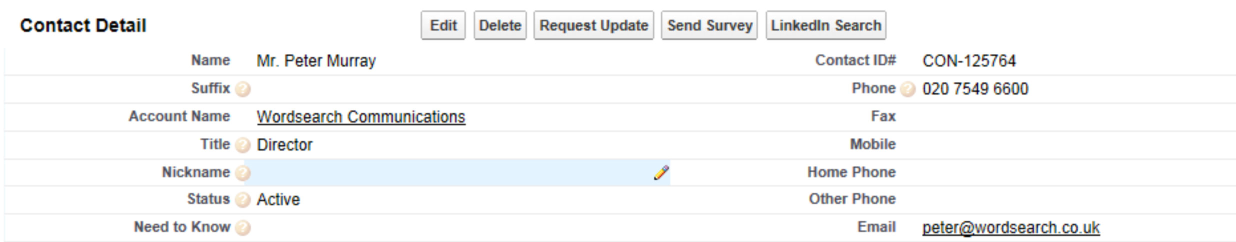
Example 1 – Adding Mr. Peter Murray at the company Wordsearch to Salesforce.

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




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.



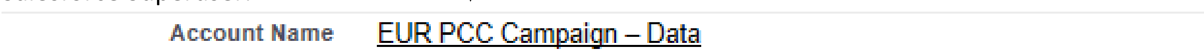

If the details of an existing contact match the details of the contact you wish to input then it is likely to be the same person.

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.



## 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.

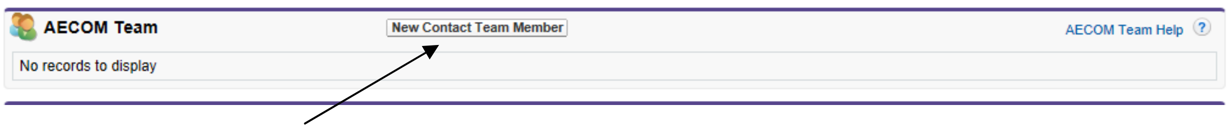
If not, it is important to add your AECOM contact to the existing contact in Salesforce for a number of reasons.

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.

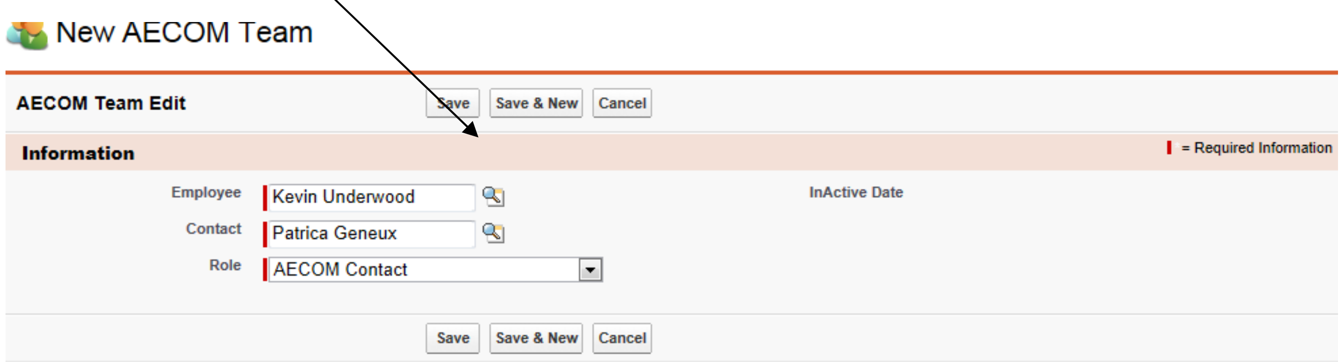
It is also beneficial for AECOM employees across different business lines to know if they have mutual external contacts with other AECOM employees. This will enable us to work together to build client relationships across business lines and build AECOM's reputation "One AECOM".

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.

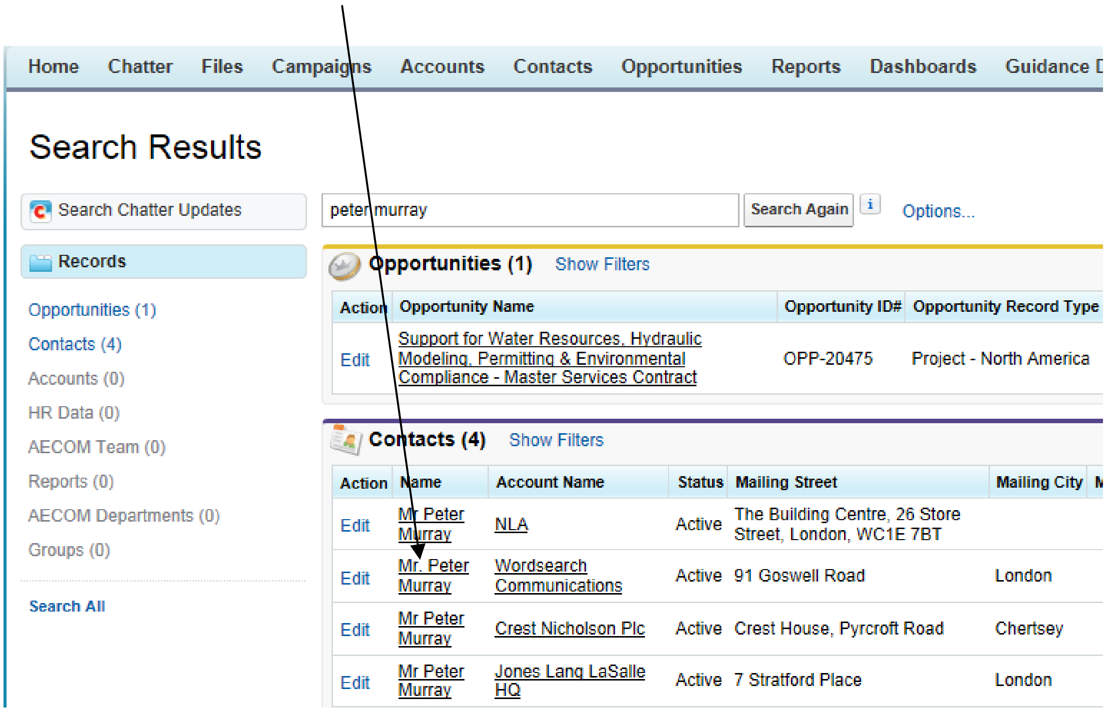
## Editing a Contact or Account

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.

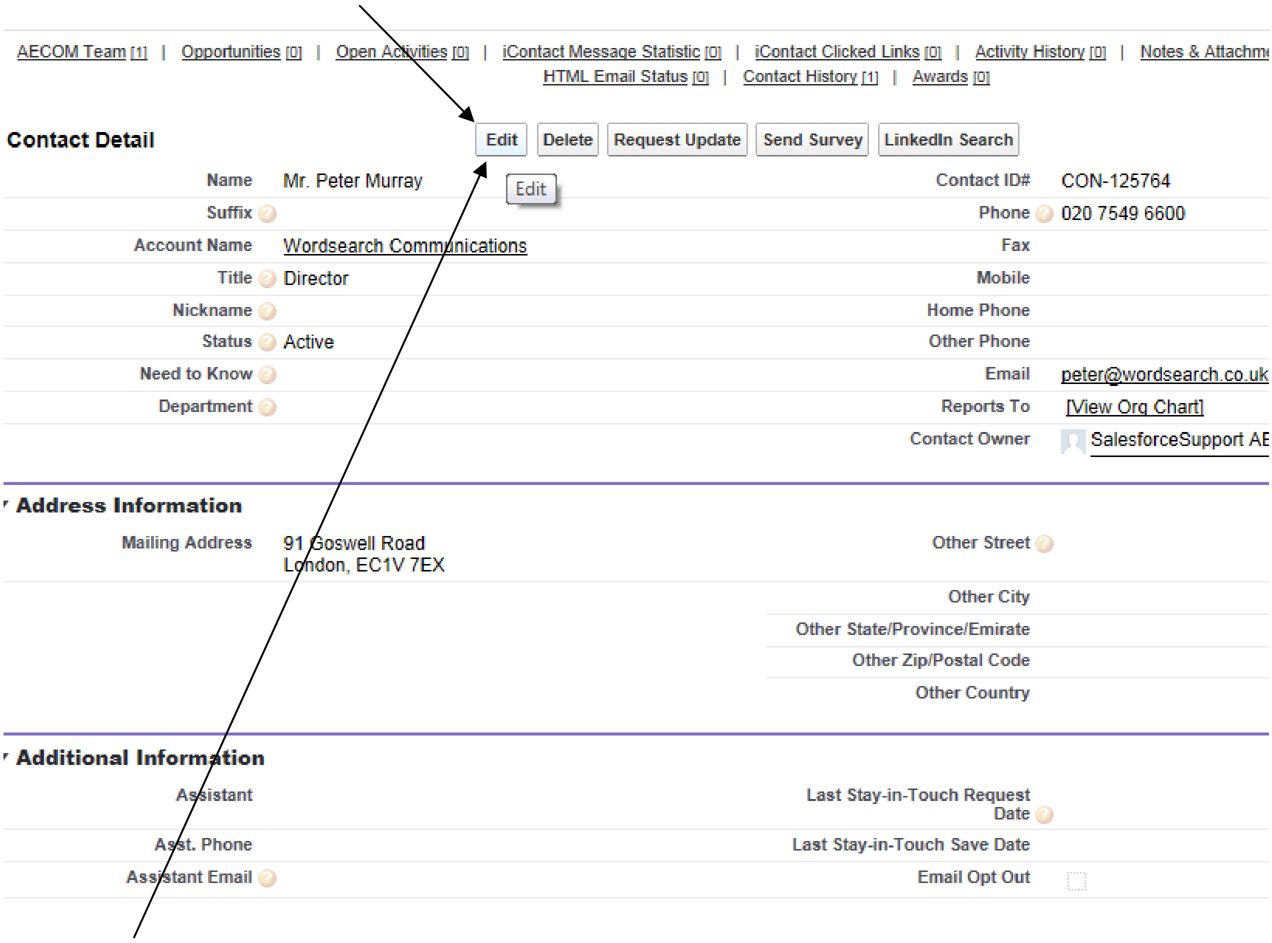
<u>Pay careful attention when updating email addresses and mailing addresses as we use this information for important mailings and invitations etc.</u>

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.



You will then need to select Edit.




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.

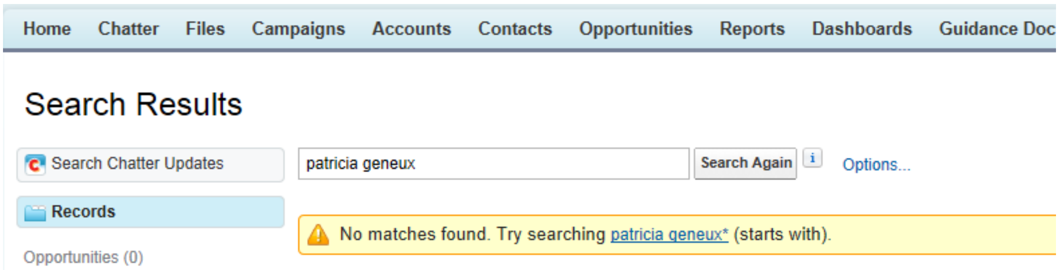
One reason you may wish to search for a contact or an opportunity via an account is due to spelling errors.

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.

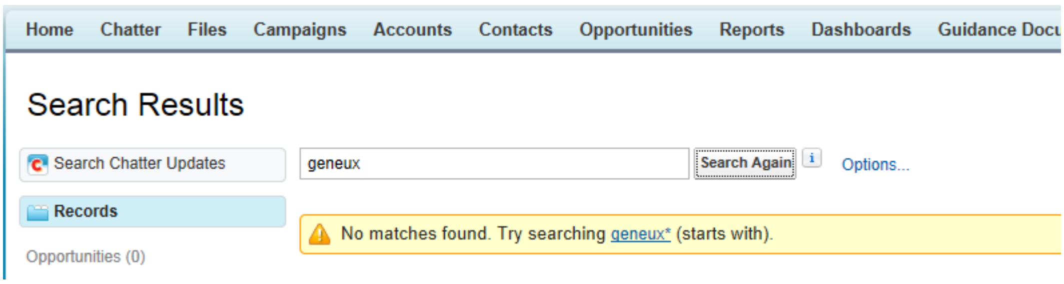
If you cannot find a contact in Salesforce using the search bar or the advanced search you should search for the company (account) that the contact works for to view all contacts linked to the account.

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:

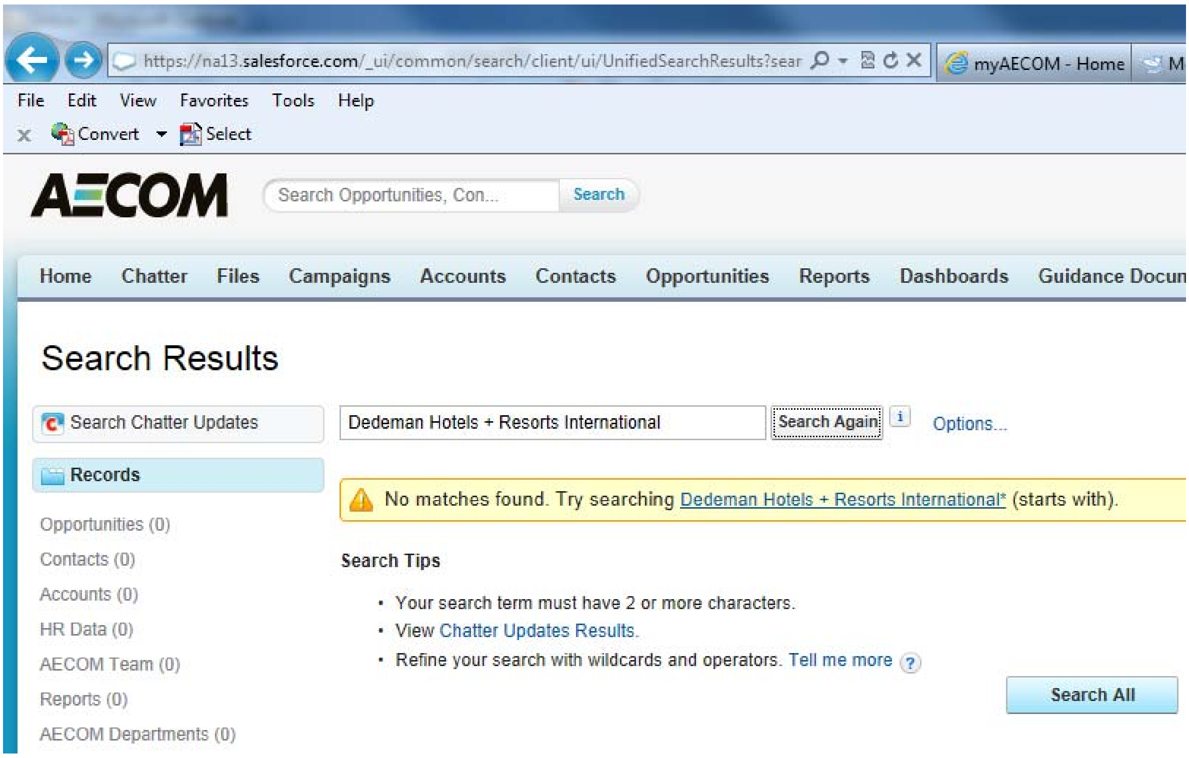



If no matches are found try searching surname only (searching by first name would be too generic).

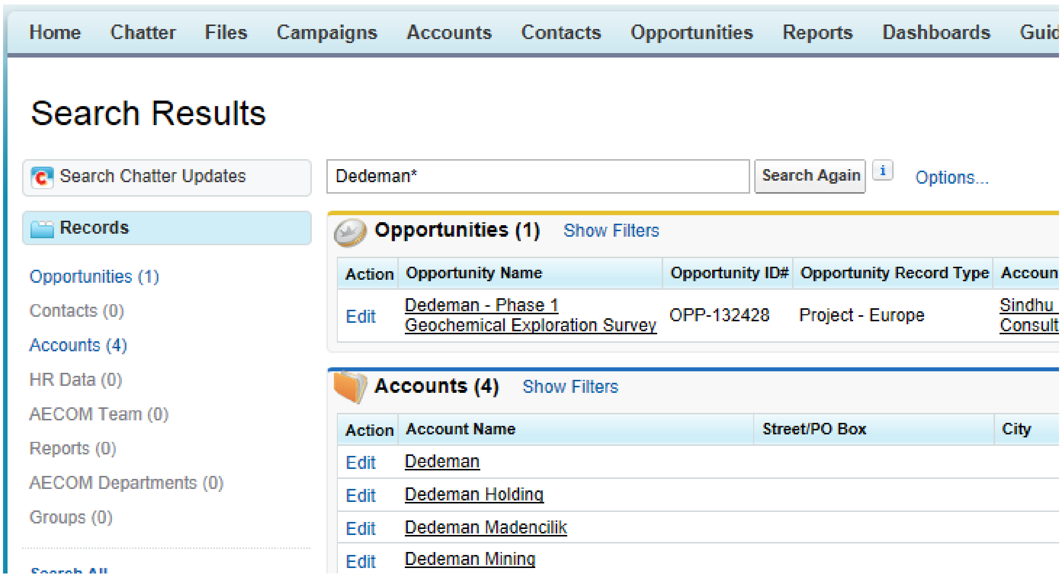



If matches are still not found try searching the account (company) in order to view all contacts linked to the account, in this case "Dedeman Hotels + Resorts International".

Type the company name in the search bar.




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



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? | |
| Client Master Service Agreement | Unknown | CAM Account Status | |
| Agreement expiration date | | CAM Status Active? | |
| 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**

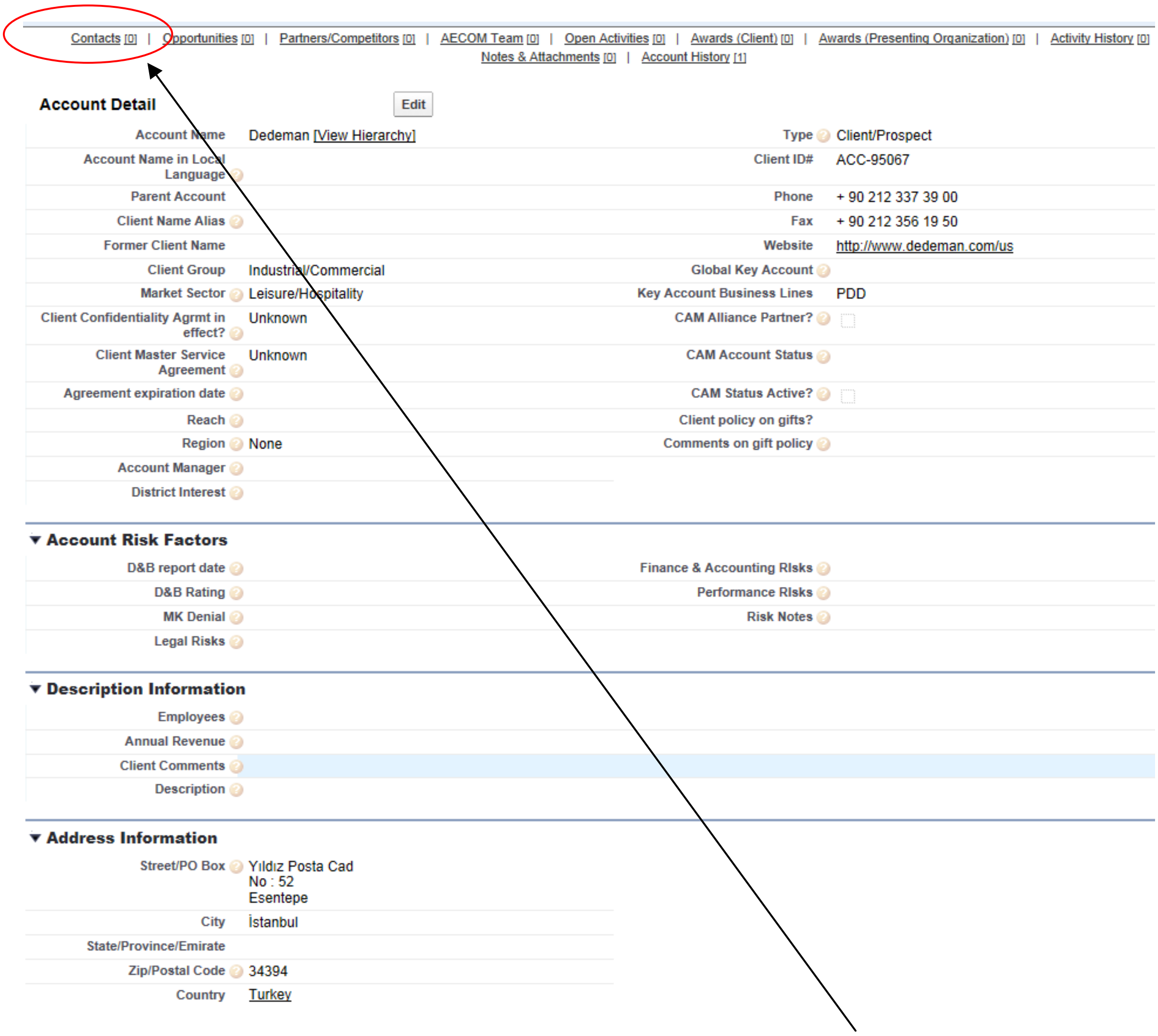
| | |
|---|---|
| Street/PO Box | Yıldız Posta Cad<br>No : 52<br>Esentepe |
| City | İstanbul |
| State/Province/Emirate | |
| Zip/Postal Code | 34394 |
| Country | Turkey |

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.




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.

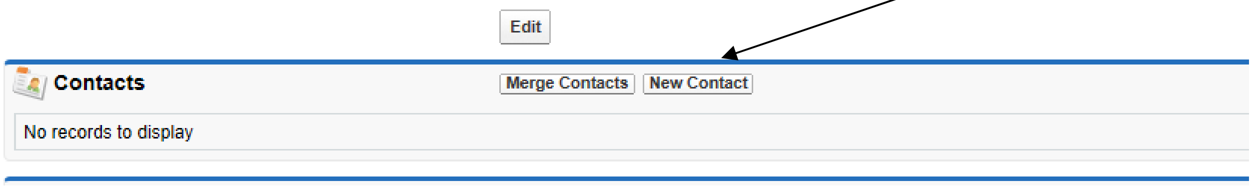
This means that Patricia Geneux is not linked to the company Dedeman, therefore a new contact should be created (see page 12).

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.

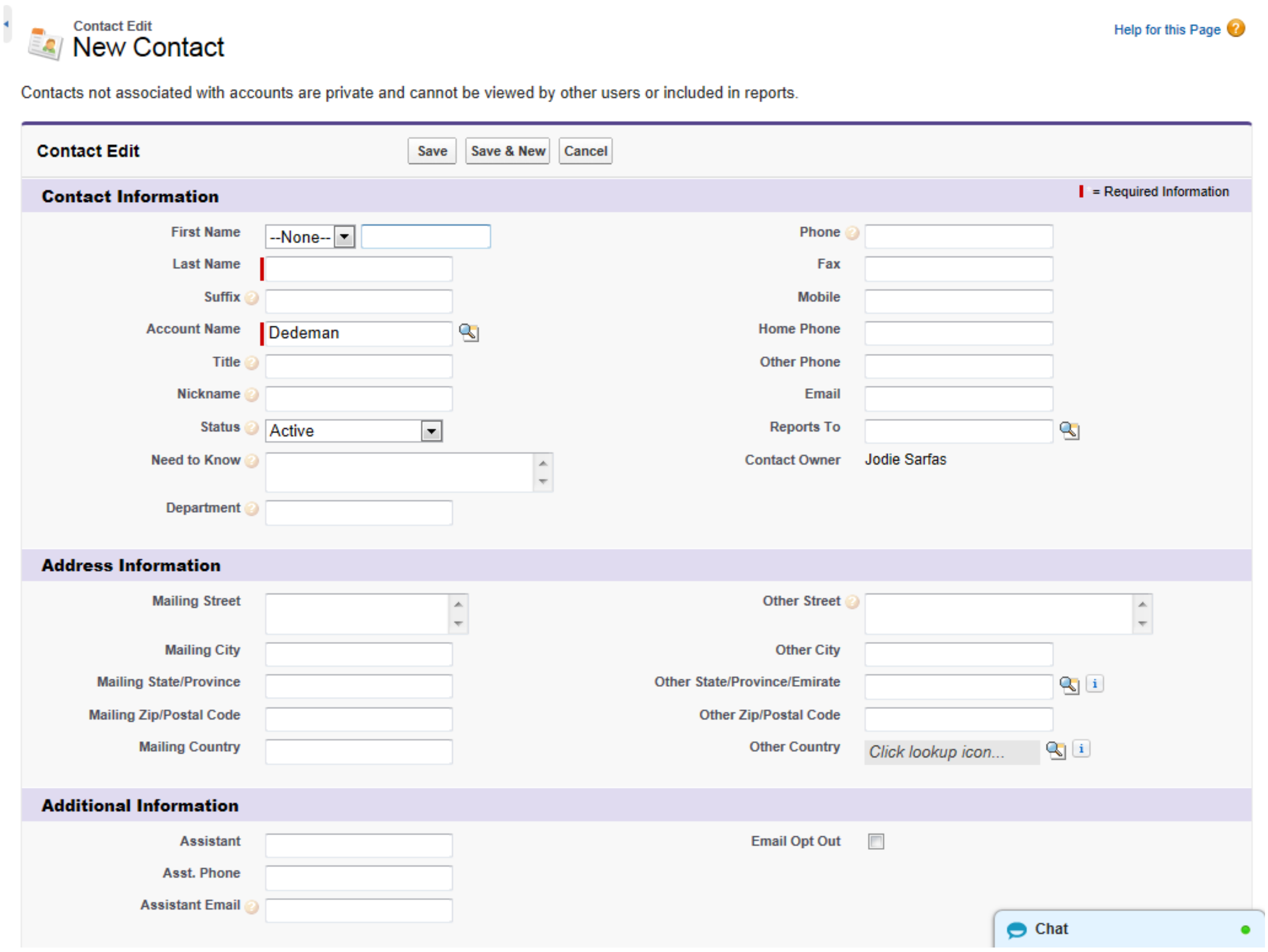
## Creating a New Contact

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.




This will bring up the entry form below:

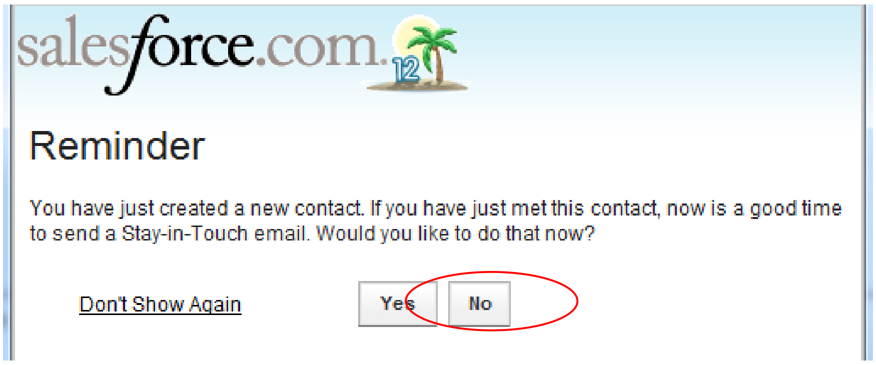



The fields marked with the red bar are mandatory.

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.

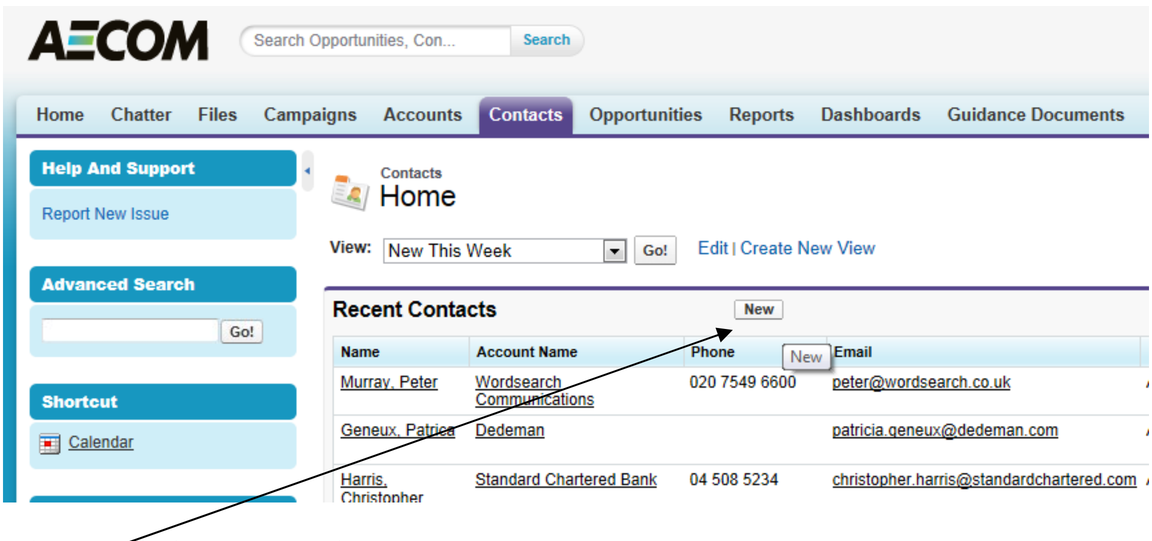
Once you have entered all of the information select save. This will bring up a reminder message:




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

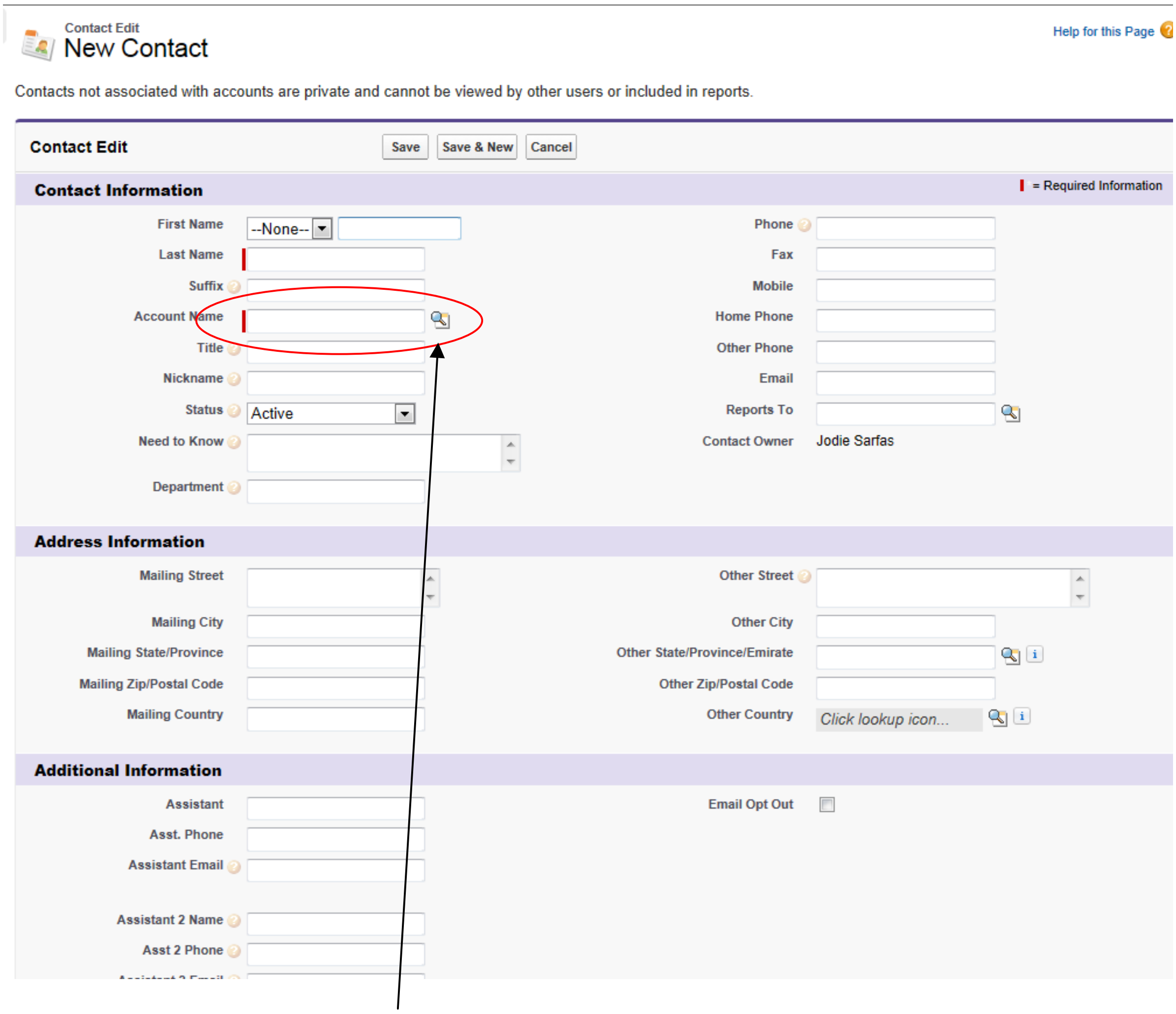
Always remember to add your AECOM Contact to the AECOM Team field (see page 5).

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.




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”.

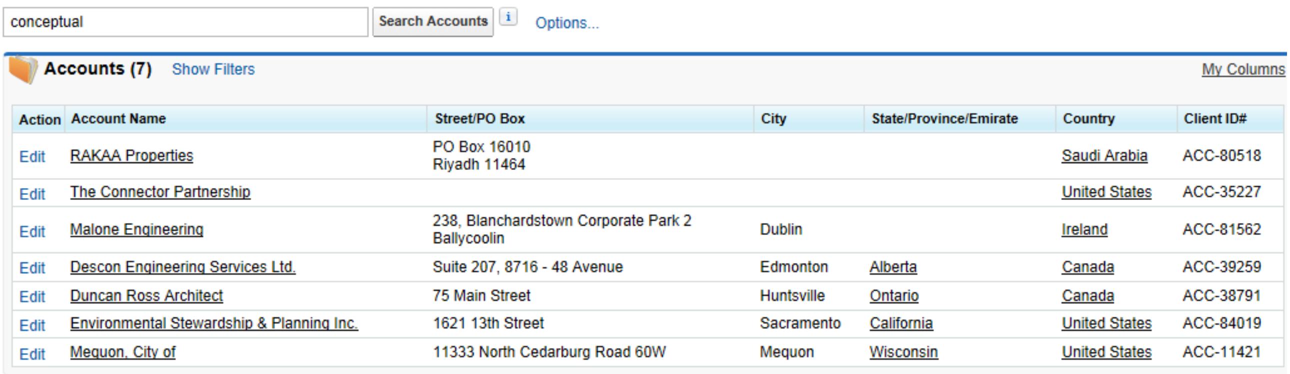
Please speak to your local Salesforce superuser if you have any queries.

## 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".

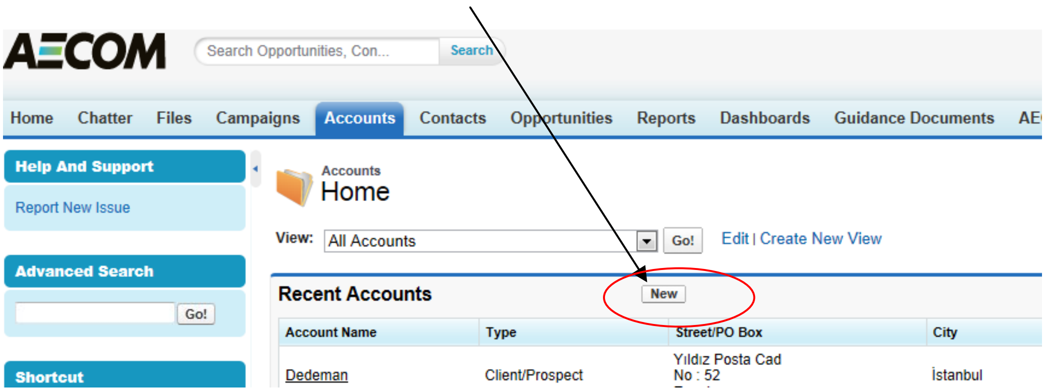
If you cannot find the account after searching by the full company name or by searching for a section of the company name then it is likely to be a new account:


conceptual | Search Accounts | Options...

Accounts (7) Show Filters — My Columns

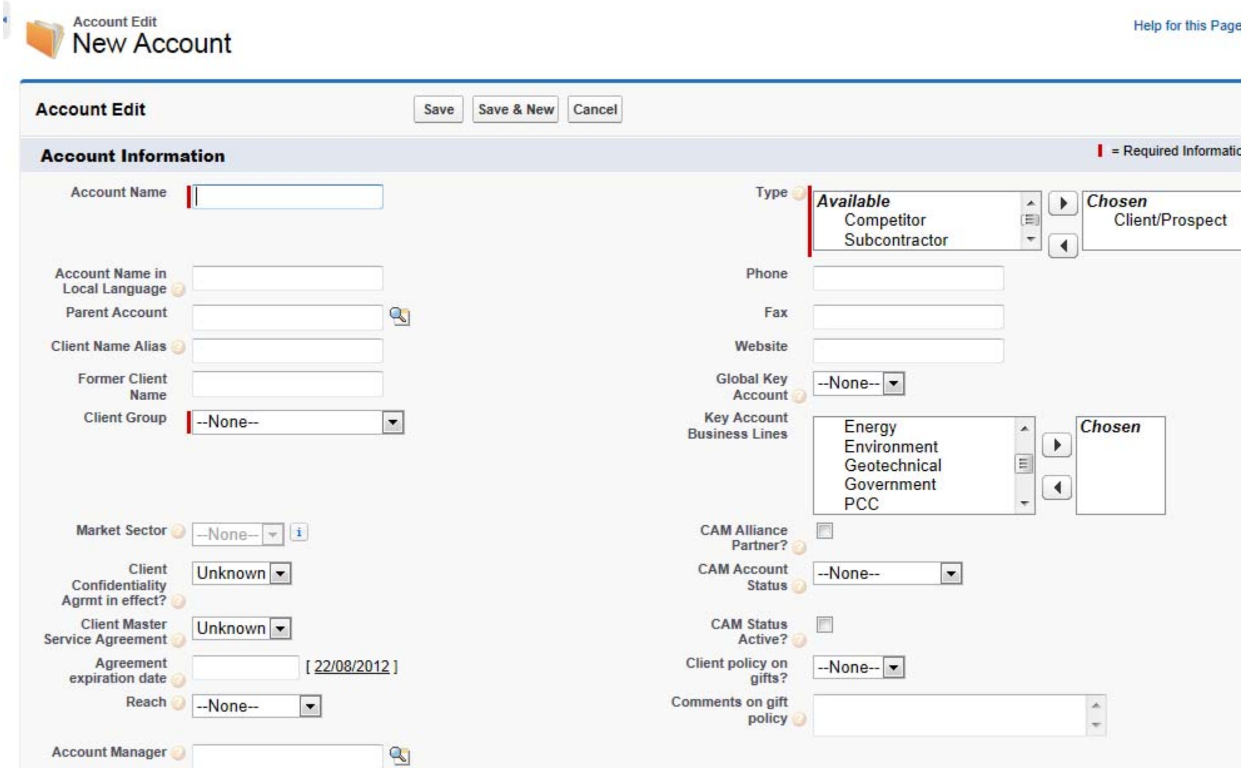
| Action | Account Name | Street/PO Box | City | State/Province/Emirate | Country | Client ID# |
|---|---|---|---|---|---|---|
| Edit | RAKAA Properties | PO Box 16010 Riyadh 11464 | | | Saudi Arabia | ACC-80518 |
| Edit | The Connector Partnership | | | | United States | ACC-35227 |
| Edit | Malone 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"




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.




<u>Here is a list of useful fields to fill in</u>:

**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 organisaiton.

**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.