**Salesforce FAQs**

Q: I can’t find an account in Salesforce that was definitely in my legacy system. Why is that?

A: Account (or Client) records were not migrated from legacy systems if they did not have any opportunities associated with them or if all the opportunities were more than two years old.

Q: Do I create a separate account for each division of a major client?

A: Yes, for example, Chicago Department of Aviation and Chicago Department of Environment are separate clients. See the Client Naming Conventions on the Documents tab for more information on naming clients.

Q: I am creating a filter, and I selected “equals” as the operator and then put multiple stages in the Values, separated by commas. I got an error message. What is wrong?

A: Use “contains” rather than “equals” if the field you are searching has a pick list. For stages, the simplest way to search is by using “starts with” and then entering the numbers of the stages you want to filter by, separated by commas, e.g. 2, 3, 4.

Q: I need to change an opportunity that was entered as type Program to a regular Project type – can I do that?

A: No, you can’t convert to a Program type. You will have to re-enter the record. Note: you can convert projects to task orders and task orders to projects because those records are fundamentally similar.

Q: In the Advanced Search, there is no selection for Project Manager.  Is there a way to do a search for opportunities done by a project manager?

A: This will work better in a report than in Advanced Search. Start with the report called **Opportunity and Team Members** under **AECOM Custom Reports** on the **Reports** tab, then customize it and save it to your personal reports folder.

Q: I need to run a report in Salesforce for projects in a particular Market Sector in my Region, how do I do this?

A: If you want to create a report for that Market Sector that you can run whenever you want, do this:

* Click on the **Reports** tab
* Scroll down to the folder for your region
* Click on the **Active Opportunities** report
* Click the **Customize** button
* Click **Edit Custom Filters** (at the top)
* In the **–Select Field-** box, choose **Market Segment**
* Under **Operator**, choose **Starts with**
* Under **Value**, type in the name of sector you want to report on
* Click **OK**
* If you want different columns, you can drag them from the left panel into the column headings row.
* When you are ready, click **Save as** (at the top)
* Fill in a report name such as Canada Central Community Infrastructure Active Opportunities
* Enter a description
* Click **Save**, or **Save and Run Report**

You can edit the report any time if you want to modify the filters or columns.