

**Beginner’s User Guide for Salesforce**

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RECORD OF CHANGES

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# 1.0 Introduction

Salesforce is a **cloud-based software platform** designed to help businesses find prospects, close deals, and deliver exceptional customer service. It combines CRM capabilities with robust cloud services to cater to various business needs, including sales, marketing, analytics, and more.

# 2.0 Getting Started

## 2.1 Accessing Salesforce

1. Access the Login Page: Open your web browser and navigate to [https://login.salesforce.com](https://login.salesforce.com/).

2. Enter Your Credentials:

• Enter your username (usually your email address).

• Enter your password.

3. Click **“Log In”.**

4. Authentication: If Multi-Factor Authentication (MFA) is enabled, complete the verification process using the authentication method configured for your account (e.g., SMS, Authenticator app).

## 2.2 Navigating the Interface

Once logged in, you will see the Home Page, which typically includes the following:

• Navigation Bar: Located at the top, it provides access to key objects such as Leads, Accounts, Contacts, and Reports.

• Search Bar: Use this to find records quickly.

• Tabs: Switch between different objects or features by selecting their corresponding tab.

• Sidebar (optional): Contains shortcuts to recent items and other helpful tools.

# 3.0 Key Feature Overview

**1. Leads**

• A lead is a potential customer who has shown interest in your products or services. In Salesforce, leads help you track prospects through the sales process.

**2. Accounts**

• Accounts represent companies or organizations you do business with.

**3. Contacts**

• Contacts are individuals associated with accounts.

**4. Opportunities**

• Opportunities track potential revenue-generating deals. These are tied to specific accounts and represent sales in progress.

**5. Reports and Dashboards**

• Reports summarize data from Salesforce records, while dashboards visualize the data for easy interpretation.

# 4.0 Basic Operations

## 4.1 Creating a New Lead

1. Go to the Leads tab from the navigation bar.

2. Click **“New”**.

3. Fill in the lead details, such as Name, Company, and Contact Information.

4. Click **“Save”**.

## 4.2 Updating an Account

1. Open the Accounts tab and select the account you wish to update.

2. Click **“Edit”**.

3. Modify the necessary fields.

4. Click **“Save”**.

## 4.3 Adding a Contact

1. Navigate to the Contacts tab and click **“New”**.

2. Fill in the contact details.

3. Associate the contact with an account by selecting the relevant account in the Account Name field.

4. Click **“Save”**.

## 4.4 Managing Opportunities

1. Go to the Opportunities tab.

2. Click **“New”** to create a new opportunity.

3. Complete fields such as Opportunity Name, Account Name, and Stage.

4. Click **“Save”**.

## 4.5 Running a Report

1. Open the Reports tab and click **“New Report”**.

2. Choose the object for your report (e.g., Leads, Accounts).

3. Define filters and columns to include in your report.

4. Click **“Run”** to generate the report.

# 5.0 Tips for Success

• Customize Views: Use list views to display the most relevant data.

• Use Global Search: Quickly find records across all Salesforce objects.

• Set Reminders: Use tasks and events to stay organized.

• Learn Keyboard Shortcuts: Save time by mastering shortcuts for frequent actions.

# 6.0 Support and Additional Resources

• Help Center: Access [Salesforce Help](https://help.salesforce.com/) for in-depth tutorials and troubleshooting.

• Trailhead: Salesforce’s free learning platform at [https://trailhead.salesforce.com](https://trailhead.salesforce.com/).

• Admin Support: Contact your organization’s Salesforce administrator for assistance with permissions or configurations.