

# Starting out with Salesforce

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# Housekeeping

- Fire Alarm
- Special Needs
- Break
- Food/Drinks
- Name, and “I Wish Salesforce could...”

# What is Salesforce?

- Customer Relationship Management system (CRM)
- Traditional database
- Platform to add in other apps, connectors, systems

# Starting with What you Know

- Let's look at how Salesforce compares to a system you might have used before

# Salesforce - List of Contacts

<div>New Contact</div> <div>Map Contacts</div> <div></div>					
<input type="checkbox"/>	Action	First Name	Last Name ↑	Phone	Mobile
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Peri</a>	<a href="#">Brown</a>	020 122 1221	0708 923 840
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Mel</a>	<a href="#">Bush</a>	020 122 8650	0709 972 128
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Stephen</a>	<a href="#">Bush</a>	2345678	
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Dorothea</a>	<a href="#">Chaplet</a>	0161 222 123	0704 321 954
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Ian</a>	<a href="#">Chesterton</a>	020 722 8124	
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Susan</a>	<a href="#">Foreman</a>	020 722 8123	0701 100 123
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Jo</a>	<a href="#">Grant</a>	020 822 2333	0704 983 195
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Zoe</a>	<a href="#">Hariot</a>	0161 223 600	0701 349 887
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Ben</a>	<a href="#">Jackson</a>	0161 222 125	0705 892 341
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Tegan</a>	<a href="#">Jovanka</a>	020 332 7201	0702 239 876
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Alister Gordon</a>	<a href="#">Lethbridge-Stewart</a>	0121 100 170	0702 233 338
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Jamie</a>	<a href="#">McCrimmon</a>	0161 223 599	0705 879 419

# Database (Excel)

	B	C	D	E
1	FIRSTNAME	LASTNAME	BUSINESS PHONE	MOBILEPHONE
2	Susan	Foreman	020 722 8123	0701 100 123
3	Ian	Chesterton	020 722 8124	
4	Barbara	Wright	020 722 8125	0702 123 534
5	Vicki	Pallister	020 722 8126	0707 665 454
6	Steven	Taylor	020 722 8127	0706 324 324
7	Dorothea	Chaplet	0161 222 123	0704 321 954
8	Polly	Wright	0161 222 124	
9	Ben	Jackson	0161 222 125	0705 892 341
10	Jamie	McCrimmon	0161 223 599	0705 879 419
11	Zoe	Hariot	0161 223 600	0701 349 887
12	Victoria	Waterfield	0161 223 601	
13	Liz	Shaw	0121 100 169	0701 232 879
14	Alister Gordon	Lethbridge-Stewart	0121 100 170	0702 233 338

# Fields

	B	C	D	E
1	FIRSTNAME	LASTNAME	BUSINESS PHONE	MOBILEPHONE
2	Susan	Foreman	020 722 8123	0701 100 123
3	Ian	Chesterton	020 722 8124	
4	Barbara	Wright	020 722 8125	0702 123 534
5	Vicki	Pallister	020 722 8126	0707 665 454
6	Steven	Taylor	020 722 8127	0706 324 324
7	Dorothea	Chaplet	0161 222 123	0704 321 954
8	Polly	Wright	0161 222 124	
9	Ben	Jackson	0161 222 125	0705 892 341
10	Jamie	McCrimmon	0161 223 599	0705 879 419
11	Zoe	Hariot	0161 223 600	0701 349 887
12	Victoria	Waterfield	0161 223 601	
13	Liz	Shaw	0121 100 169	0701 232 879
14	Alister Gordon		0121 100 170	0702 233 338

# Records

	B	C	D	E
1	FIRSTNAME	LASTNAME	BUSINESS PHONE	MOBILEPHONE
2	Susan	Foreman	020 722 8123	0701 100 123
3	Ian	Chesterton	020 722 8124	
4	Barbara	Wright	020 722 8125	0702 123 534
5	Vicki	Pallister	020 722 8126	0707 665 454
7	Dorothea	Chaplet	0161 222 123	0704 321 954
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12	Victoria	Waterfield	0161 223 601	
13	Liz	Shaw	0121 100 169	0701 232 879
14	Alister Gordon	Lethbridge-Stewart	0121 100 170	0702 233 338



# Exercise

	A	B	C	D
1	Account	Contact	Opportunity	Likelihood
2	Heat and Light Co	Fred Smith	Light bulbs (60W)	10%
3	Heat and Light Co	F. Smith	Light bulbs (40W)	20
4	Heat & Light Co	Frederick Smith	Kettle (3kW)	30%
5	Heat and Light Co.	Fred Smythe	LED Light Bulb (5W)	90%
6	Heat and Fight Co	Jane Doe	LED Light Bulbs (5W)	80%
7	H & L Company	Janet Doe	L.E.D. Light Bulb (5W)	61%
8	H & L Co.	Jane Do	Kettle (3k.W.)	10%

- Spot at least 3 problems (there are 15)

# Account

- Account Typed repeatedly (wrongly)

A	B	C	D
Account	Contact	Opportunity	Likelihood
Heat and Light Co	ed Smith	Light bulbs (60W)	10%
Heat and Light Co	Smith	Light bulbs (40W)	20
Heat & Light Co	ederick Smith	Kettle (3kW)	30%
Heat and Light Co.	ed Smythe	LED Light Bulb (5W)	90%
Heat and Fight Co	ne Doe	LED Light Bulbs (5W)	80%
H & L Company	net Doe	L.E.D. Light Bulb (5W)	61%
H & L Co	ne Do	Kettle (3k.W.)	10%

# Typing Mistakes

- Inconsistent Formatting

	A	B	C	D
1	<b>Account</b>	<b>Contact</b>	<b>Opportunity</b>	
2	Heat and Light Co	Fred Smith	Light bulbs (60W)	10%
3	Heat and Light Co	F. Smith	Light bulbs (40W)	20
4	Heat & Light Co	Frederick Smith	Kettle (3kW)	
5	Heat and Light Co.	Fred Smythe		90%
6	Heat and Fight Co	Jane Doe	LED Light Bulbs (5W)	80%
7	H & L Company	Janet Doe	L.E.D. Light Bulb (5W)	61%
8	H & L Co.	Jane Do		10%

# Multiple People

- What happens if more than one person needs to edit an Excel spreadsheet?
- What happens if one department looks after products and another after accounts/contacts?

# Getting into Salesforce

- Any common browser
  - Internet Explorer
  - Firefox
  - Safari
  - Chrome
- Browse to [login.salesforce.com](https://login.salesforce.com) (no www.)
- Enter your username and password

# I can log in from ANYWHERE?

- Yes!
- If you can browse the web, you can log in.
- Can be restricted to certain times and/or certain locations
- You can also access it on: BlackBerry, iPad, iPhone, Android.

# Logon Screen

- Let's log in!
- login.salesforce.com

User Name

myuser@thirdsectorit.org

Password

••••••••••

☐ Remember User Name

Login

[Forgot your password?](#)

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

# Exercise

- Log in to the Training Database
- Username is  
[traininguserxxx@thirdsectorit.org](mailto:traininguserxxx@thirdsectorit.org)  
i.e. [traininguser123@thirdsectorit.org](mailto:traininguser123@thirdsectorit.org)
- Password is thirdsectorit





salesforce

12

Search Leads, Accounts, C...

Search

Options...

Subscribe Now!

Third Sector IT ...

Help & Training

Sales

Home

Chatter

Files

Leads

Accounts

Contacts

Opportunities

Reports

Dashboards

Products

Forecasts

+

Blue Box Corp

Record

Customize Page | Edit Layout | Printable View | Help for this Page

Show Chatter

Follow

Chatter (currently hidden)

« Back to List: Development Package

Contacts [3]

Open Activities [0]

Activity History [0]

Opportunities [5+]

Cases [0]

Partners [0]

Notes & Attachments [0]

Account Detail

Edit

Delete

Sharing

Detail Page

Account Owner

Third Sector IT Training [Change]

Phone

0161 222 120

Account Name

Blue Box Corp [View Hierarchy]

Fax

Parent Account

Website

http://www.bluebox.null

County

Borsetshire

Ticker Symbol

Contacts

New Contact

Merge Contacts

Related Lists

Contacts Help

Action	Contact Name	Title	Email	Phone
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Dorothea Chaplet</a>		<a href="#">dorothea@bluebox.null</a>	0161 222 123
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Ben Jackson</a>		<a href="#">ben@bluebox.null</a>	0161 222 125
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Polly Wright</a>		<a href="#">polly@bluebox.null</a>	0161 222 124

Open Activities

New Task

New Event

Open Activities Help

No records to display

Send A Call

Mail Merge

Send An Email

Activity History Help

Sidebar has been hidden

# Standard Objects

- Salesforce comes with a number of objects that are standard
- You can loosely think of an object as a spreadsheet

# Accounts Object

- An Account is any company, NGO, working group, entity, partner, etc., that you have or hope to have a relationship with
- Accounts are central in using Salesforce – both Contacts and Opportunities are directly connected to Accounts

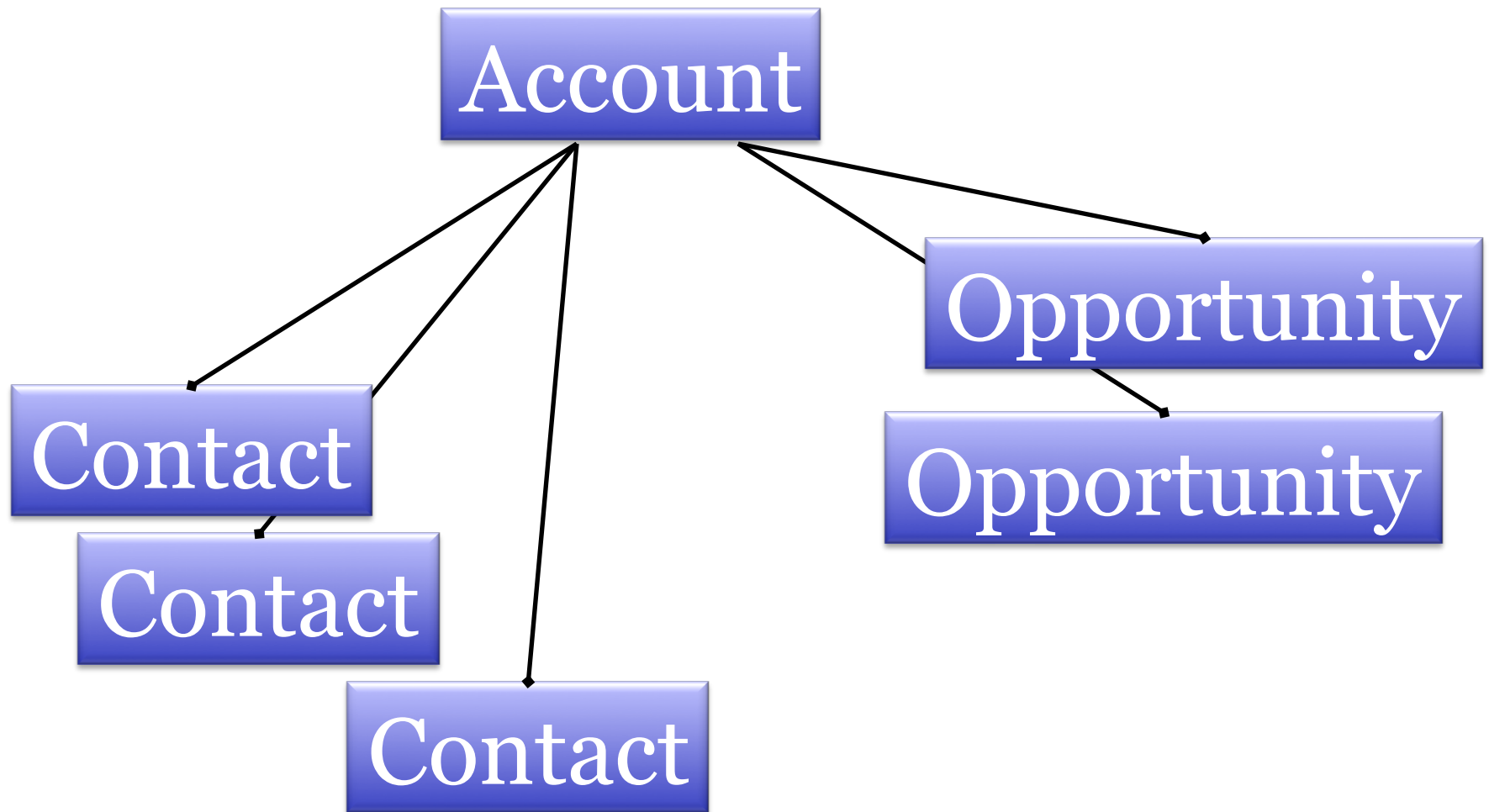
# Contacts Object

- Any person who you have or hope to have a business relationship with
- Can include partners, suppliers, vendors, customers, prospects – anyone with a pulse.

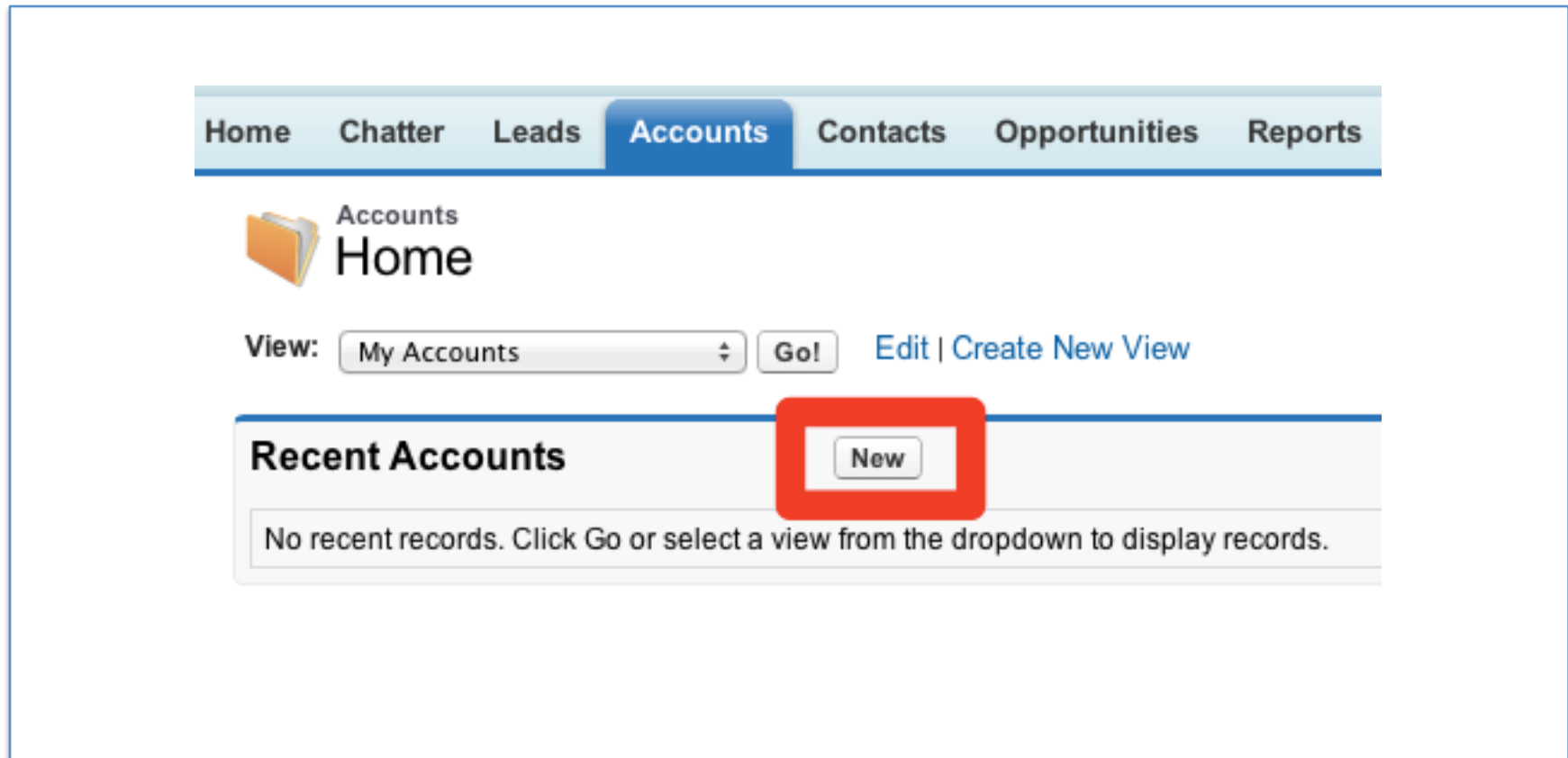
# Opportunities Object

- Any potential or realised business opportunity.
- Roughly similar to an order form, or agreement, or invoice.
- Tracks potential, as well as won and lost business opportunities.
- Can be used by finance team to estimate cashflow

# Salesforce Structure



# Create New Accounts





# Record Edit Page

- Red Line means compulsory
- Magnifying Glass 'Looks up' 

# Create New Contacts

- Click New Contact:
  - Create it on the Account Record page of the Account you just created (on the Related List)
  - Create it from the contacts tab
- Which one is better?

# Create New Opportunities

- Click New Opportunity:
  - Create it on the opportunities tab
  - Create it on the accounts tab
  - Create it on the contacts tab
- What is the difference?

# Editing Records

- Either individually from the Record Page
  - Double Click – the font turns orange – then Save
  - Click Edit, then Save
- Or en-masse using inline editing

# Inline Editing

New Account		Map Accounts			A   B   C   D   E   F   G   H   I   J   K   L   M
<input type="checkbox"/>	Action	Account Name ↑	Billing City	Billing State/Province	Billing Country
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Air Vents Unlimited</a>	Cardiff		Wales
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Blue Box Corp</a>	Canary Wharf		England
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Cadets R Us</a>	Edinburgh		Scotland
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Chameleon Circuits...</a>	Saffron Walden		England
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Cyber Corp</a>	Buckingham		England
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Gallifreyan Fields Ltd</a>	Pontprennau		Wales
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">✓</a>	<a href="#">Gelnite Co.</a>	Oslo	Oslo	
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Green Gunge Co Ltd</a>	Edinburgh		Scotland
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Jelly Baby Machines</a>	Glasgow		Scotland
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">✓</a>	<a href="#">Light-Steps</a>	Whitecote		UK
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">New Millennium Co</a>	Blaby		England
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Peri Productions Ltd</a>	St Saviour		Jersey
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Schlechter Wolf G...</a>	Melksham		England
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">Skaro Productions</a>	Dorking		England
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	<a href="#">The Authentic Aust...</a>	Barry		Wales

# Underlined Fields

- Allows you to go to the related object
- Pick an account
- Find the related contacts
- Click on the underline to go there
- You CAN use your 'back' button to go back.
- You can also hover on a Link

# Leads

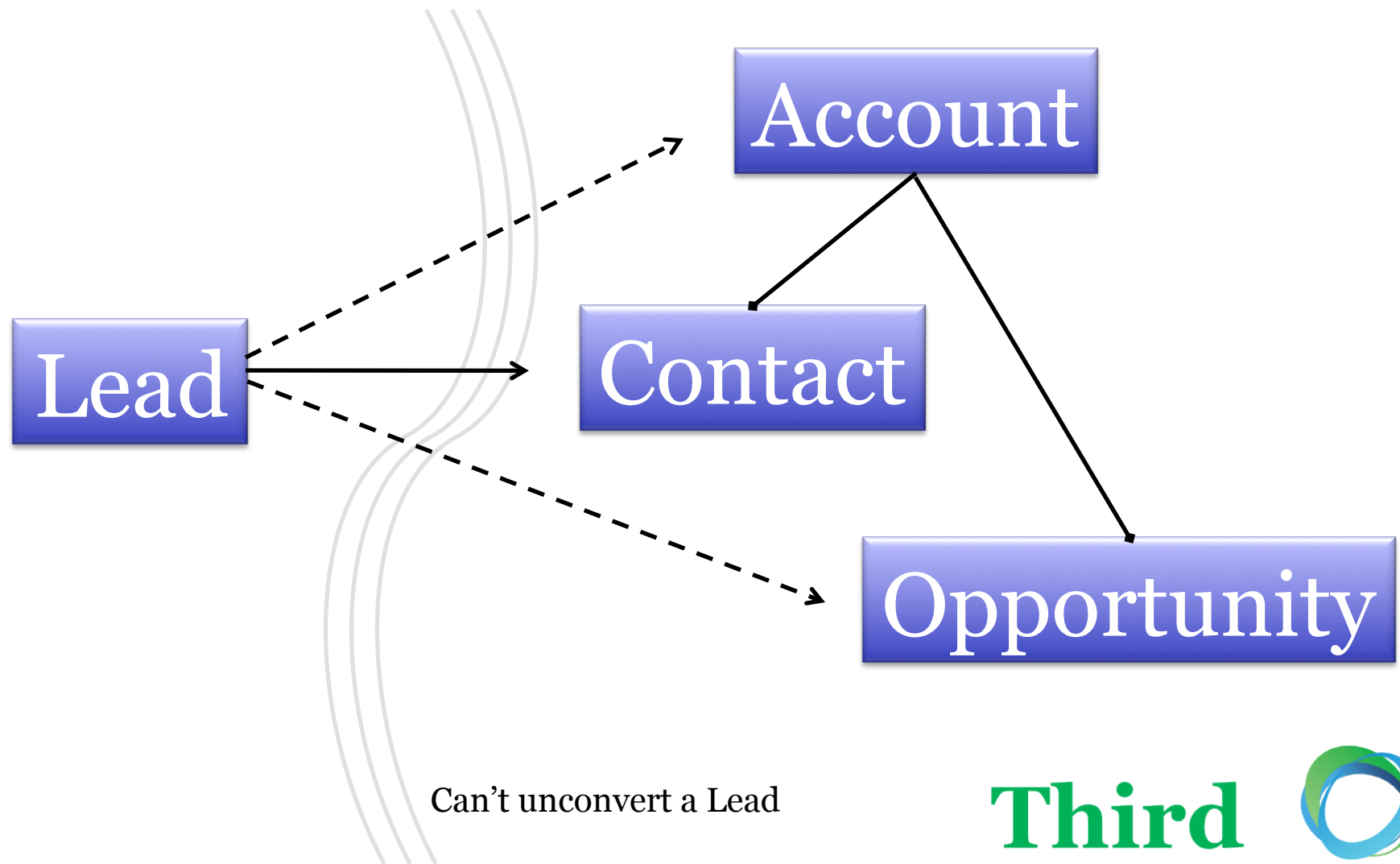
- Leads are optionally used to represent someone with a potential relationship rather than an actual relationship
- Organisation wide agreement on what is a Lead and what is a Contact is a good idea
- Leads who develop a relationship are converted to Contacts, and optionally Accounts and Relationships

# Leads Explained

- Leads can come from
  - Web to Lead
  - A list you bought
  - A stack of business cards
- Leads can be thought of as
  - Marketing prospects rather than Sales contacts
  - People you keep communicating with until they became Sales contacts or become unqualified



# Lead Conversion



# Leads Can Be Tricky

- Agree on common definition of Lead, and difference between Lead and Contact
- Do you have a process for Qualifying Leads?
- When would you convert a Lead to a Contact?
- What can you do (and not do) with a Lead?

# Lead Exercise

- Create a Lead and Save it, making sure you specify Lead Source.
- Add the Lead to a Campaign.
- Convert it to an Account, Contact and Opportunity.
- Search for the Lead's name – can you find him/her as a Lead or Contact?
- Does the contact have the same lead source and Campaign?

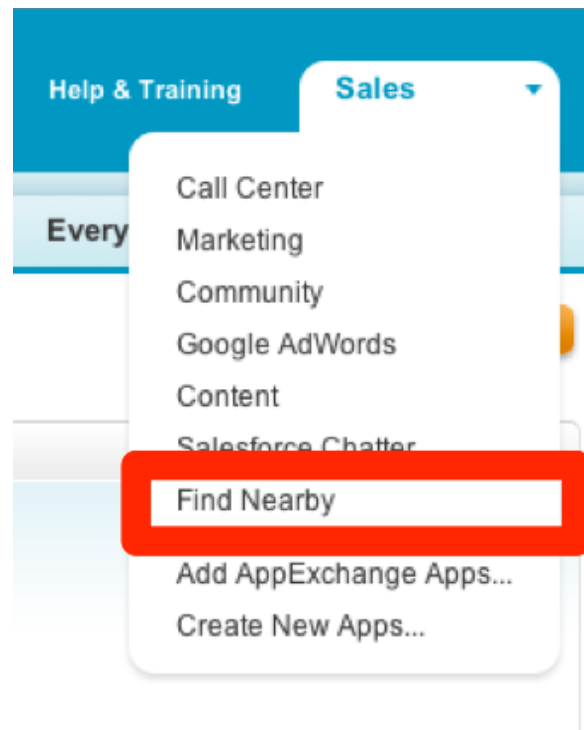
# Global Search

- Searches your whole database
- Can be limited to certain objects to get exactly what you want

# Wildcards

- Just means that the '\*' can be anything
- Fred would match 'fred', 'Fred', 'frED', etc
- Fred\* would also match 'frederick', 'freda'...
- ? is ONE of anything
- Re?d would match 'Reed' and 'Read' but not 'Reeed' or 'Red'
- Can't be used as first character, so no '\*eed'

# Apps and Tabs



# More Objects



# Chatter

- How do you currently communicate with your colleagues?
- How many cc'd emails a day? That you actually read?
- <http://www.youtube.com/watch?v=jJgZpMkAKqE>
- How could you use this in your organisation?



# Chatter in Action

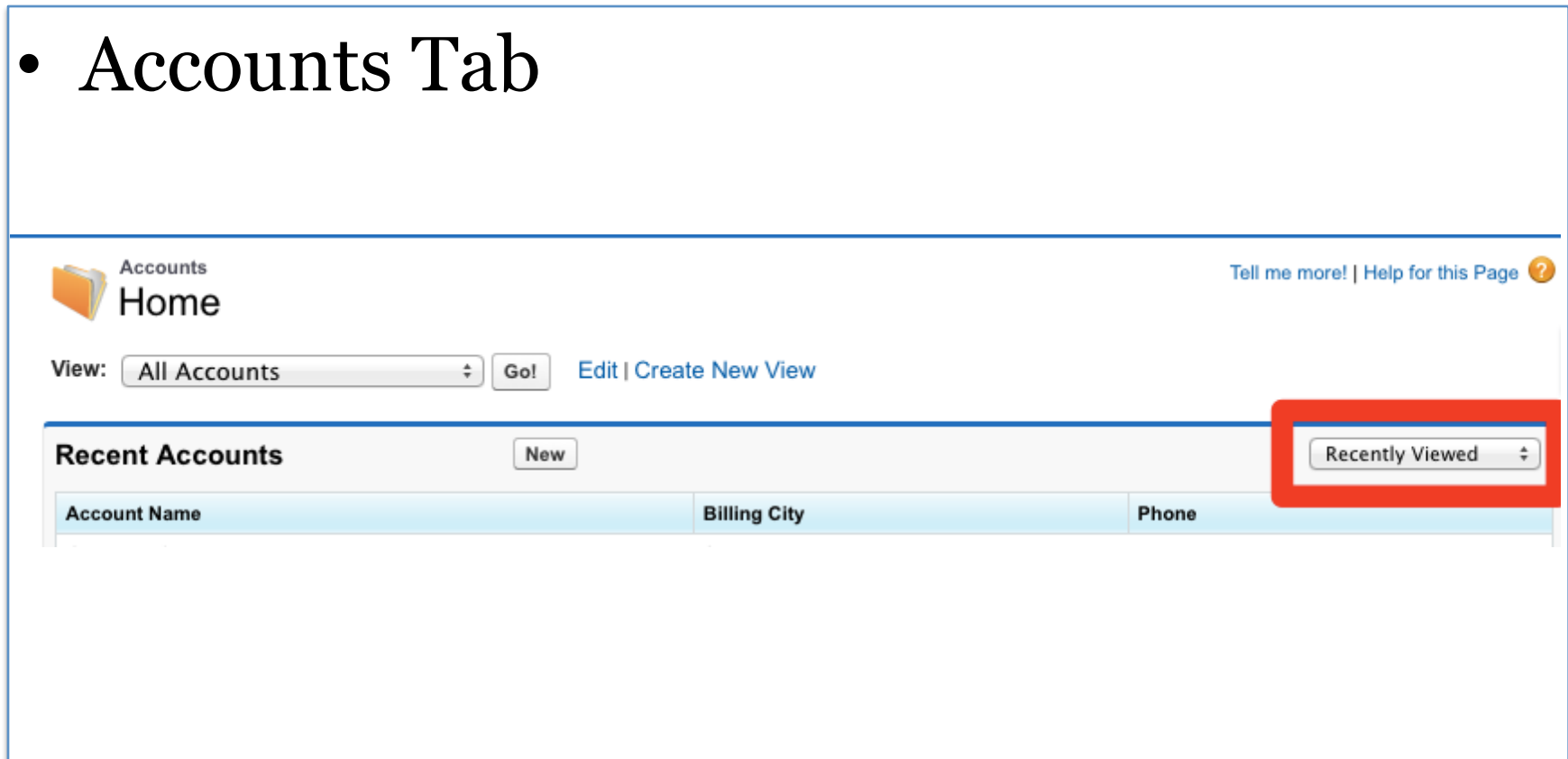
- Click the Chatter Tab
- Follow a few people
- Go to a record
- Chat on the Record, and then @ Direct Message Someone
- Write a message in the All Staff Chatter Group

# Views

- We will look at different Views
- These give you different ways to view your data

# First thing you see...

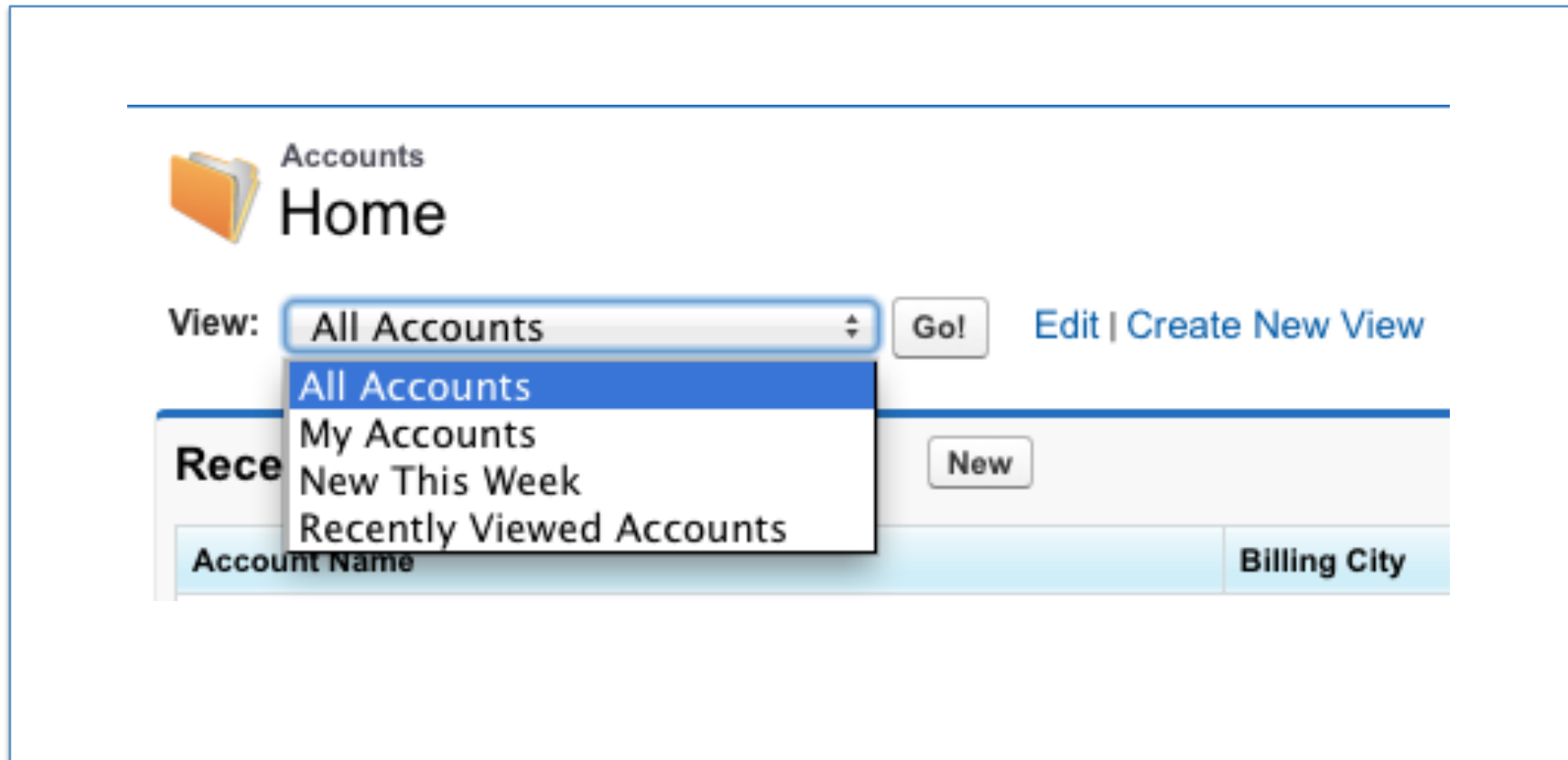
- Accounts Tab



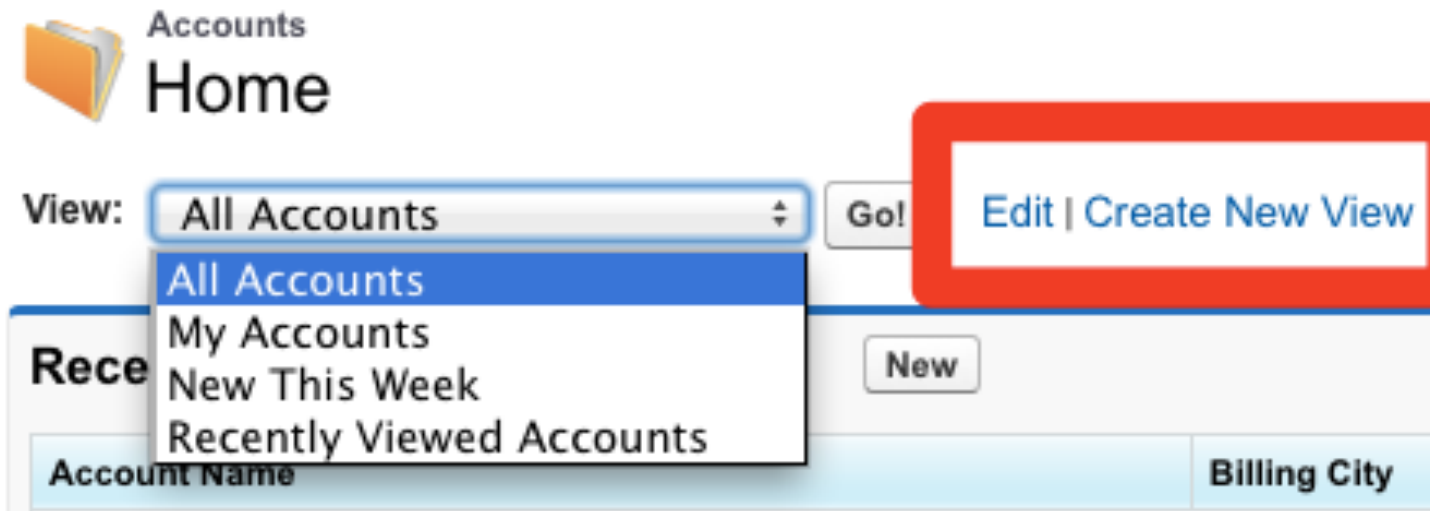
The screenshot shows the 'Accounts Home' page. At the top left is a folder icon and the text 'Accounts Home'. At the top right is a link 'Tell me more! | Help for this Page' with a question mark icon. Below this is a 'View:' section with a dropdown menu set to 'All Accounts', a 'Go!' button, and a link 'Edit | Create New View'. Below the view section is a 'Recent Accounts' section with a 'New' button. To the right of the 'Recent Accounts' section is a dropdown menu labeled 'Recently Viewed' with a downward arrow, which is highlighted by a red rectangle. Below this is a table with three columns: 'Account Name', 'Billing City', and 'Phone'.

Account Name	Billing City	Phone
--------------	--------------	-------

# Views



# Create your own Views



# Reporting

- Views are an easy way of looking at a Single Object (just Contacts, or just Accounts)
- Reports can look at multiple objects, and summarise information

# Mobile

- Salesforce Mobile Lite – Blackberry and iPhone / iPod Touch / iPad
- Chatter
- Salesforce for iPad
- Coming in ~12 months Salesforce Touch (all devices)

# Help and Support

- This gives access to lots of resources



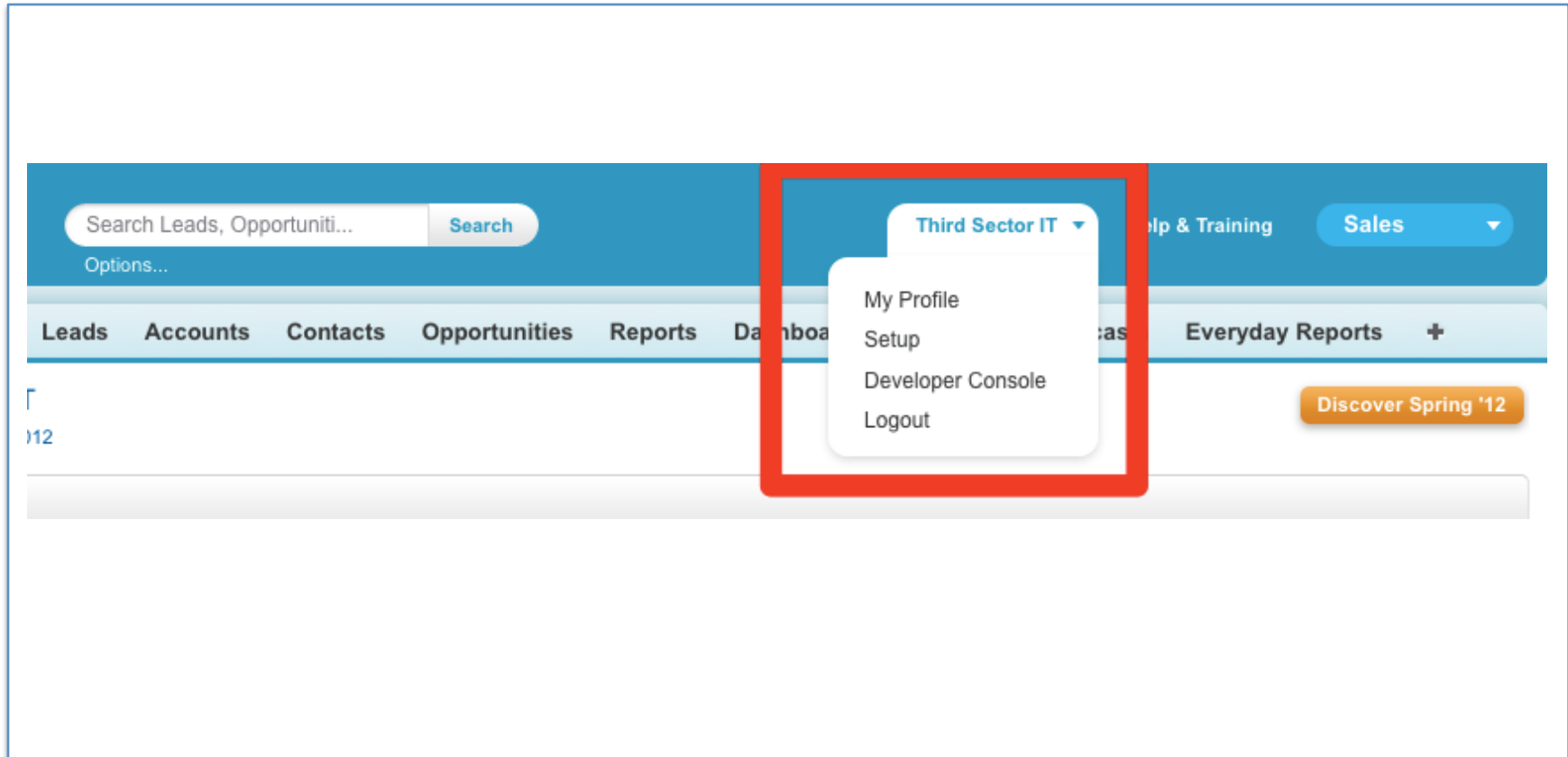
- Also try  
<http://thirdsectorit.org/salesforce-training-london-uk/free-salesforce-training/>



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# The End

