

# SFDC - General Navigation Training

January 2018



# Learning Outcomes

SFDC General Navigation .

- Log into Salesforce Account
- Explore Homepage
- Use the Global Search Function
- Complete the My Profile Page
- Explore Tabs
- Explore favorites
- Use List Views
- Create List Views

# Icons

**See It! Mode** – You will follow along and watch as the Trainer performs the activities on the Salesforce web page .



**Do It! Mode** – You will perform the activities on the Salesforce account that has been allocated to you.



*A few ground rules...*

- 1. Add your name as a suffix to the end of any dummy data you enter in the system during the “Do It” activities.*
- 2. In the “Do It” activities, remember to only work on the data you have created.*

# Getting Started with Salesforce



## Checklist

- ✓ Complete Verification Process
- ✓ Set-up new password
- ✓ Set-up security question
- ✓ Log-out
- ✓ Log-in to Salesforce

1. Log-in to your RPRA Email account
2. Locate the welcome email from Salesforce Support
3. Click on the verify account button
4. Enter a new password
5. Choose a security question
6. Click on change password
7. Log-out and close window
8. Log back into Salesforce by going to [test.salesforce.com](https://test.salesforce.com) or [login.salesforce.com](https://login.salesforce.com)
9. Your username is your RPRA email.

# Console Homepage



## Checklist

- ✓ Explore homepage dashboards
- ✓ Explore recent items
- ✓ Examine Menu Tab
- ✓ Explore App Launcher

### Note:

The sidebar is used to quickly navigate to items such as Accounts, Contacts, Cases and the related views associated with these items, in addition to having access to the records, new records and list views can be created from the sidebar.

## Features of the Left Sidebar

1. Access to List Views
2. Create New Records

## Features of the Console Tabs.

1. Access to more than one record using multiple tabs.
2. Access related records using sub tabs.

## Features of the Homepage:

1. Dashboard
2. Recent Records

# Homepage



## Checklist

- ✓ Explore homepage dashboards
- ✓ Explore recent items
- ✓ Examine Menu Tab
- ✓ Explore App Launcher

## Features of the Home Page

1. Use App Launcher to access apps and objects
2. Access Objects through the tabs
3. Explore the homepage dashboard
4. Access record list views through the lists available on the homepage
5. Access records marked as favorites
6. Access notifications
7. Access user profile management and personal settings.

# Global Search Function



## Checklist

- ✓ Search for a Contact
- ✓ Search for an Account

### Note:

Use the Global Search to find records in Salesforce from the header search box. Global search keeps track of which objects you use and how often you use them, and arranges the search results accordingly. The global search features an auto-complete capability additionally, as the search text is keyed in, some preliminary results are returned.

1. Use the **Search** bar at the top of every page in Salesforce to perform a quick search of records such as accounts, contacts, cases, and other records within Salesforce.
2. Search for “<Name of existing Contact>” and examine the how records are sorted by object

# Complete My Profile Page



## Checklist

- ✓ Complete My Profile
- ✓ Change your contact info
- ✓ Change your profile photo

### Note:

The My Profile page captures information that you want your colleagues to see about yourself. Your profile message would also include all chatter posts related to you .

1. Click on your avatar at the top right corner then click on **My Name**
2. To change your profile picture, click on the camera icon on the avatar and click on **Upload Photo** to upload your new photo
3. Fill out the About Section to enter information about yourself
4. Use the **Contact** tab to enter your contact info.



# Change Your Settings



## Checklist

- ✓ My Settings
- ✓ Personal Settings
- ✓ Email Settings
- ✓ Email Templates

1. Click on the avatar at the top right corner then click on **Settings**
2. Click on **My Personal Information** heading in the sidebar to expand additional features such as personal information, change password and time-zone.
3. Expand the **Email** heading to access email settings.

# Tabs Overview (1/4)



## Checklist

- ✓ The Home Tab
- ✓ Accounts Tab
- ✓ Contacts Tab
- ✓ Cases Tab
- ✓ Registration Details Tab
- ✓ Knowledge Tab
- ✓ Reports Tab
- ✓ Dashboards Tab

1. The **Home** tab is the first page you see after logging into Salesforce . Use the Home Tab to explore some dashboard charts as well as recent records list view.
2. The other tabs take you to different functionality eg. The Account tab takes you to the Accounts management tool which provides users with the ability to access account records, create new accounts, view and create list views

## Tabs Overview (2/4)



### Checklist

- ✓ The Accounts Tab
- ✓ The Contacts Tab

3. Use the **Accounts** tab to manage and view Producer or PRO organizations. Through the Accounts tab you can view recently viewed accounts, accounts lists, create new accounts, and manage the accounts list views.
4. Use the **Contacts** tab to manage and view individuals associated with Producer and PRO organizations. Through the Contacts tab you would have access to different contact lists, create new contacts, and manage contact list views.

## Tabs Overview (3/4)



### Checklist

- ✓ The Cases Tab
- ✓ The Knowledge Tab
- ✓ The Registration Details Tab

5. **Cases** are detailed descriptions of a contact's feedback, problem, or question. Use cases to track and solve your customers' issues. The Cases tab provides access to this functionality.
6. **The Knowledge Tab** provides access to articles (FAQs and Procedure) in the knowledgebase. Users can see different article list views, create new articles (with the right permissions).
7. **Registration Details** gives access to information related to Producer/PRO registrations. These include information about registration status, material associated with the registration, date of registration etc.

## Tabs Overview (4/4)



### Checklist

- ✓ The Reports Tab
- ✓ The Dashboards Tab

8. Use **Reports and Dashboards** to access tables, charts and graphs related to data within Salesforce. The Reports and Dashboards provide insight into the accounts, contacts, cases and other related data within the system


# Using Favourites



## Checklist

- ✓ See Favourite Records
- ✓ Set Favourite

Use Favourites to add records to the favourites list

1. Go to a record
2. Click on the star part of the favourites icon to add or remove the record from your favourites list 
3. Use the dropdown button beside the star to access your favourites list.  
(Some records may not be added to the favourites list)

# List View



## Checklist

- ✓ Examine List View
- ✓ Sort by Columns
- ✓ Edit Record from List View

### Note:

- List views can be accessed on each of the Tab pages. In this scenario, we are going to look at the list views in the Accounts tab.


1. Click on the **Accounts** Tab
2. By default you would be taken to the “Recently Viewed” list view
3. Click on the drop-down arrow beside the “Recently Viewed” and choose “All” list view.
4. Click on the Account Name Column to sort the accounts by Account Name.
5. On the extreme right end of the first record click on the arrow, choose Edit.

# Create New View



## Checklist

- ✓ Setup your new view
- ✓ Examine new view

1. Click on the List View Controls icon 
2. Select “New” form the List
3. Enter “All Registrants” as your List View name
4. Select the “All users can see this list view” option and click Save
5. On the right sidebar, some filtering options are displayed, Click on the “My Accounts” option and change to All Accounts.
6. Click on “Add Filter” From the list of fields choose “Type” Set the Operator to “equals” and for the value option select “Registrant”
7. Click on Save



## Summary of Learning

Key Topics	Description
<b>Global Search</b>	Use the Global Search box to search for records and fields in Salesforce. Global search keeps track of which objects you use and how often you use them, and arranges the search results accordingly. Search results for the objects you use most frequently appear at the top of the list.
<b>List View</b>	A list display of items such as Accounts or Contacts, based on a predefined criteria. Some List Views have been created in for each Object and is available for use.



Questions?