



YOUR GUIDE TO SALESFORCE

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Welcome

This is your help guide to Salesforce Sales Cloud at Oxfam.

Amy Christian Oxfam

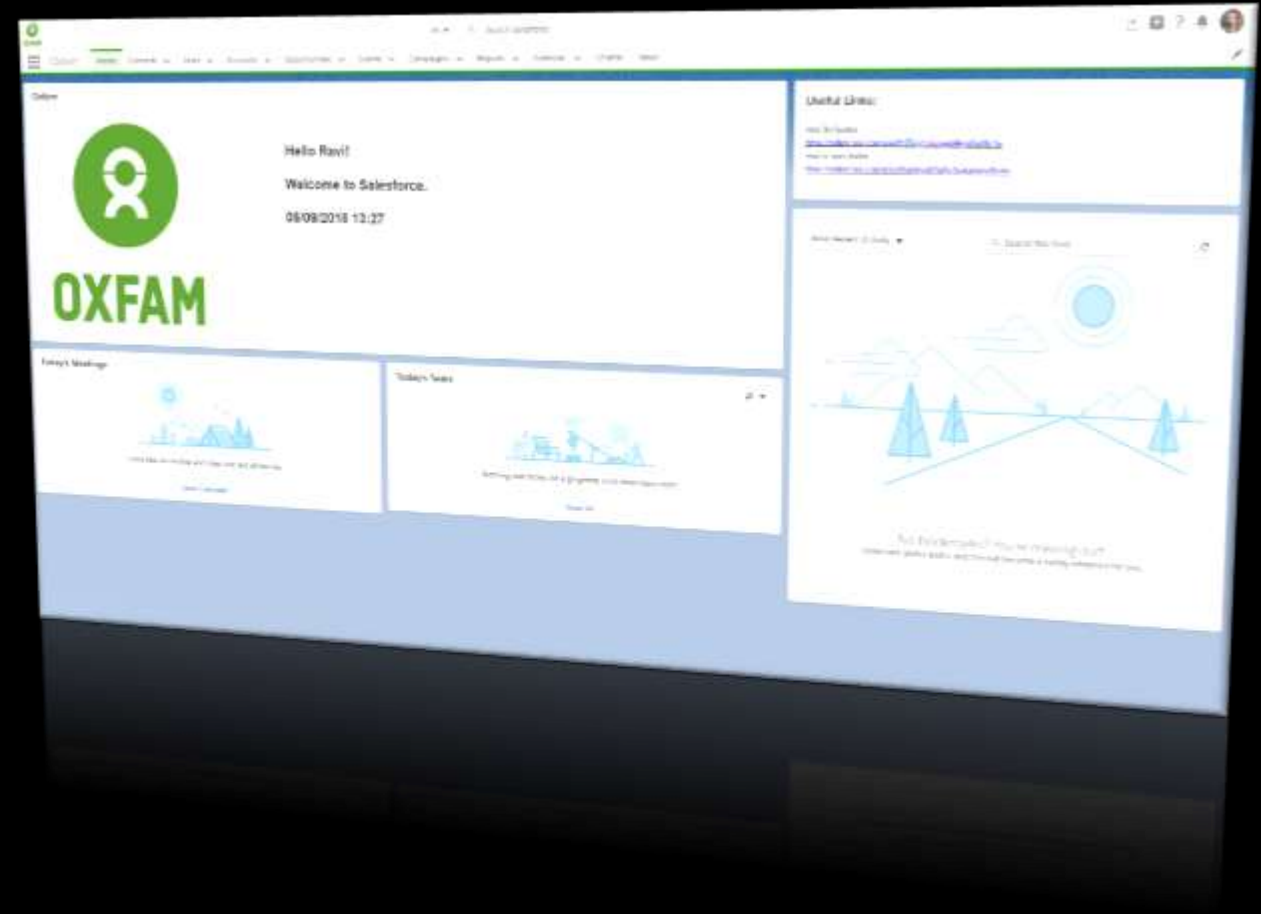




About Salesforce

Salesforce is the single place for us to record all our interactions supporters and volunteers. It enables us to provide a joint-up experience, ensuring we demonstrate to all our supporters and volunteers how important them making contact with us is.

To provide a fantastic service it is critical that we ensure the data is accurate, sufficient and collected lawfully.





Log in

1. Open your browser, or a new tab.
2. In the address, enter oxfamgb.my.salesforce.com
3. Enter your username and password

What is my username?

Your Windows email address

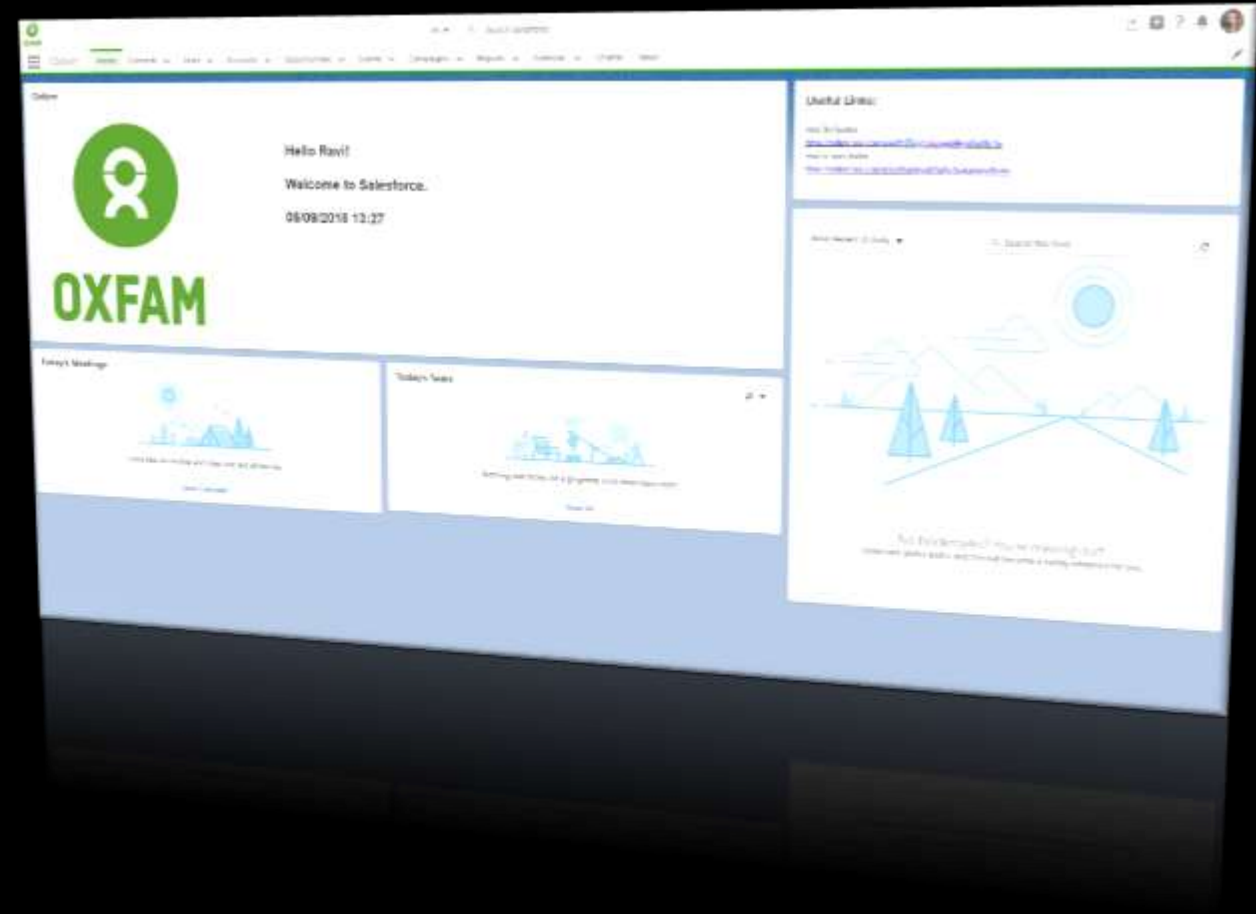
What is my password?

The same as what you use for Windows. If you've forgotten, select the option "forgot your password?" and follow that process.

I am stuck

If the URL, username or password is not working, contact Oxfam helpdesk using (method).

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A look around

Favourites
Global Actions
Notifications

Global Search

Apps
Launcher

Links for help

The screenshot shows the Oxfam Salesforce dashboard. At the top, there's a navigation bar with the Oxfam logo, a home button, and a menu with options like Contacts, Tasks, Accounts, Opportunities, Events, Campaigns, Reports, and Calendar. A search bar labeled 'Search Salesforce' is also present. Below the navigation bar, the main content area features a large Oxfam logo and a greeting: 'Hello Ravi! Welcome to Salesforce. 05/09/2018 13:27'. To the left of the main content, there's a section for 'Today's Meetings' with a calendar icon and a message: 'Looks like you're free and clear the rest of the day. View Calendar'. To the right, there's a section for 'Today's Tasks' with a task icon and a message: 'Nothing due today. Be a go-getter, and check back soon. View All'. On the far right, there's a sidebar with 'Useful Links' (including 'How To Guides' and 'How to use chatter') and 'Most Recent Activity' (with a search bar and a landscape illustration). At the bottom of the sidebar, there's a message: 'No bookmarks? You're missing out! Bookmark useful posts, and this will become a handy reference for you.'

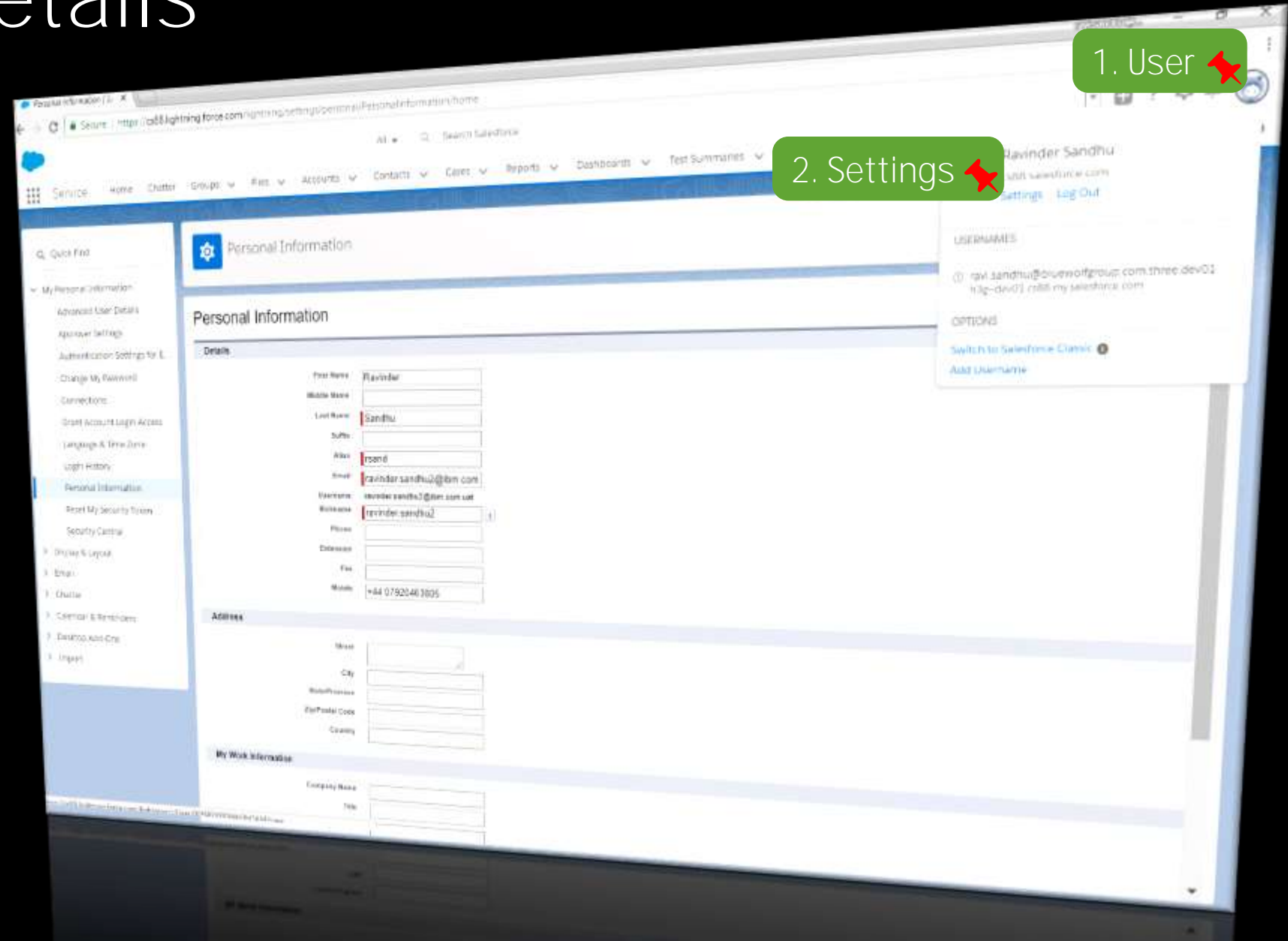
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Change my details

The place to change:

- Personal Information such as name, telephone number and address.
- Signature for emails sent through Salesforce.
- Chatter, such as what activities to receive email notifications for, and how frequently. Also switch email notifications off.

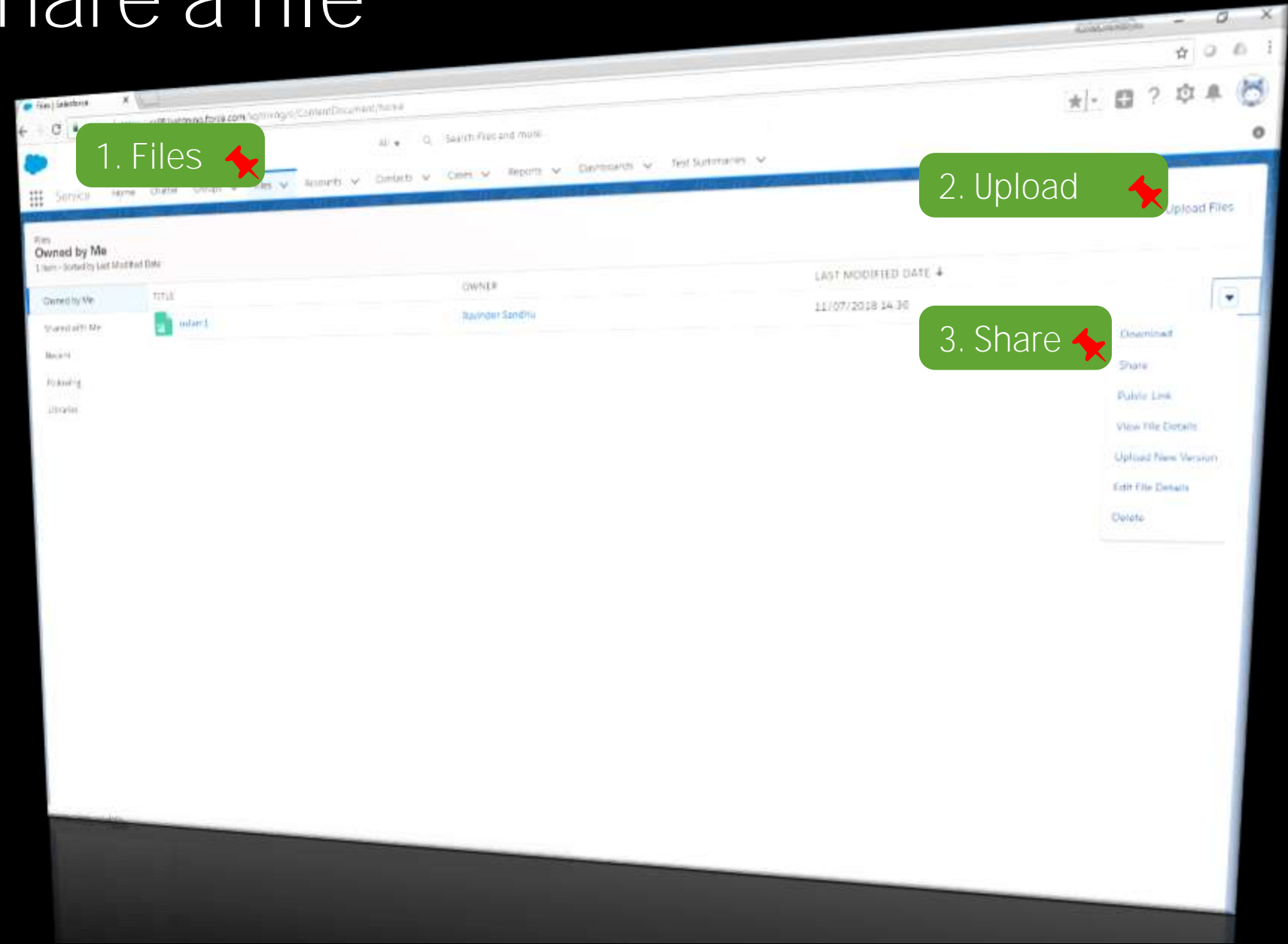




Upload and share a file

Place files into Salesforce to use it as an internal or external hosting platform.

Can I upload multiple versions?
Salesforce supports versions, **which means there's no need to** upload new versions and risk having conflicts or duplicates. Each time you want a newer version, choose **Upload New Version**.



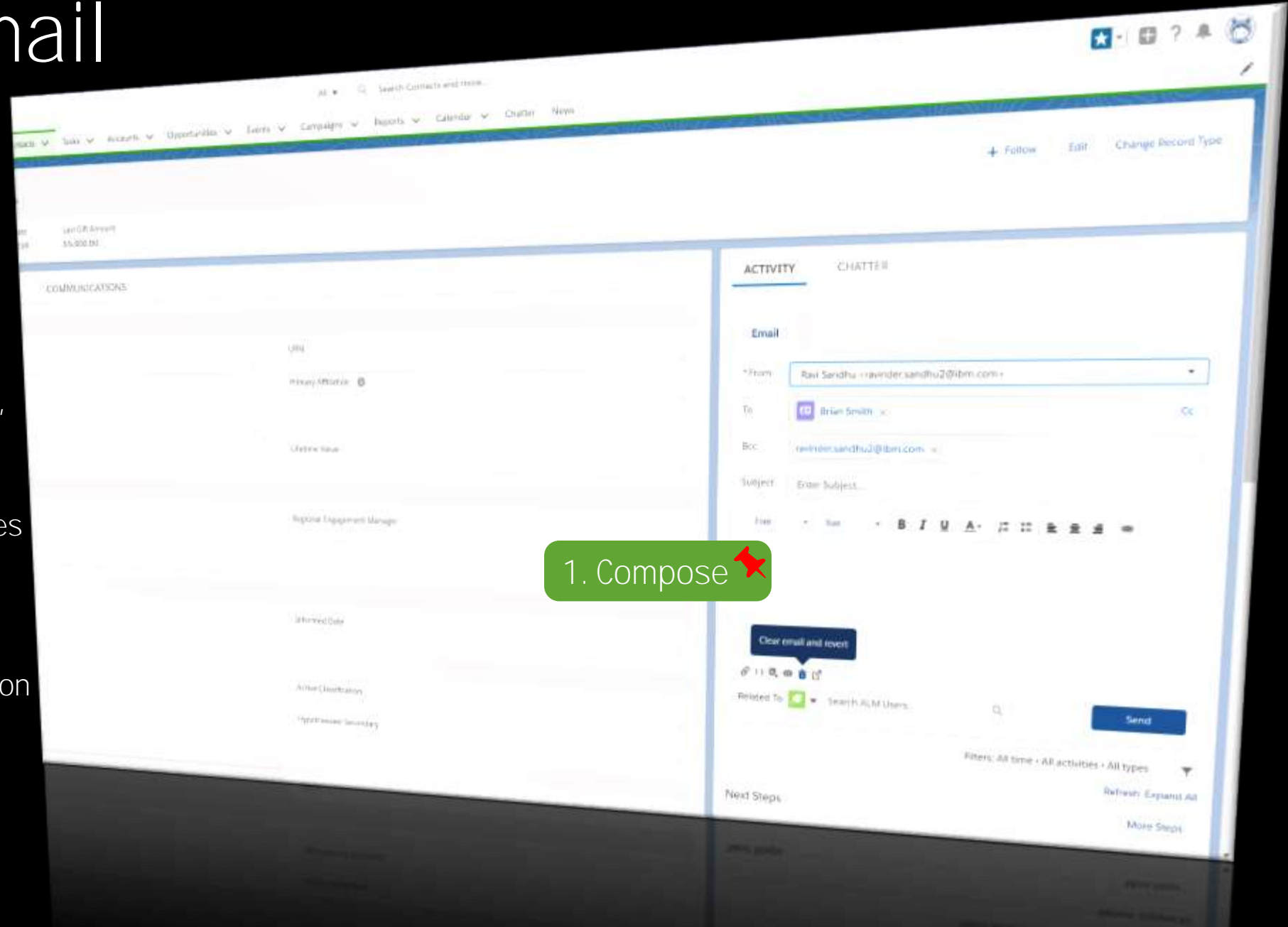


Send an email

Available in records such as Contacts, Accounts, Opportunities and Events.

Not suitable for mass communication. This function may not be used by your team, please check.

1. Ensure the email addresses are correct.
2. Add a subject.
3. Use merge fields to save time and ensure information is accurate.



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Collaborate through Chatter

Collaborate with colleagues, volunteers and supports using this social feature.

The posts you share on the main page are shared across Oxfam.

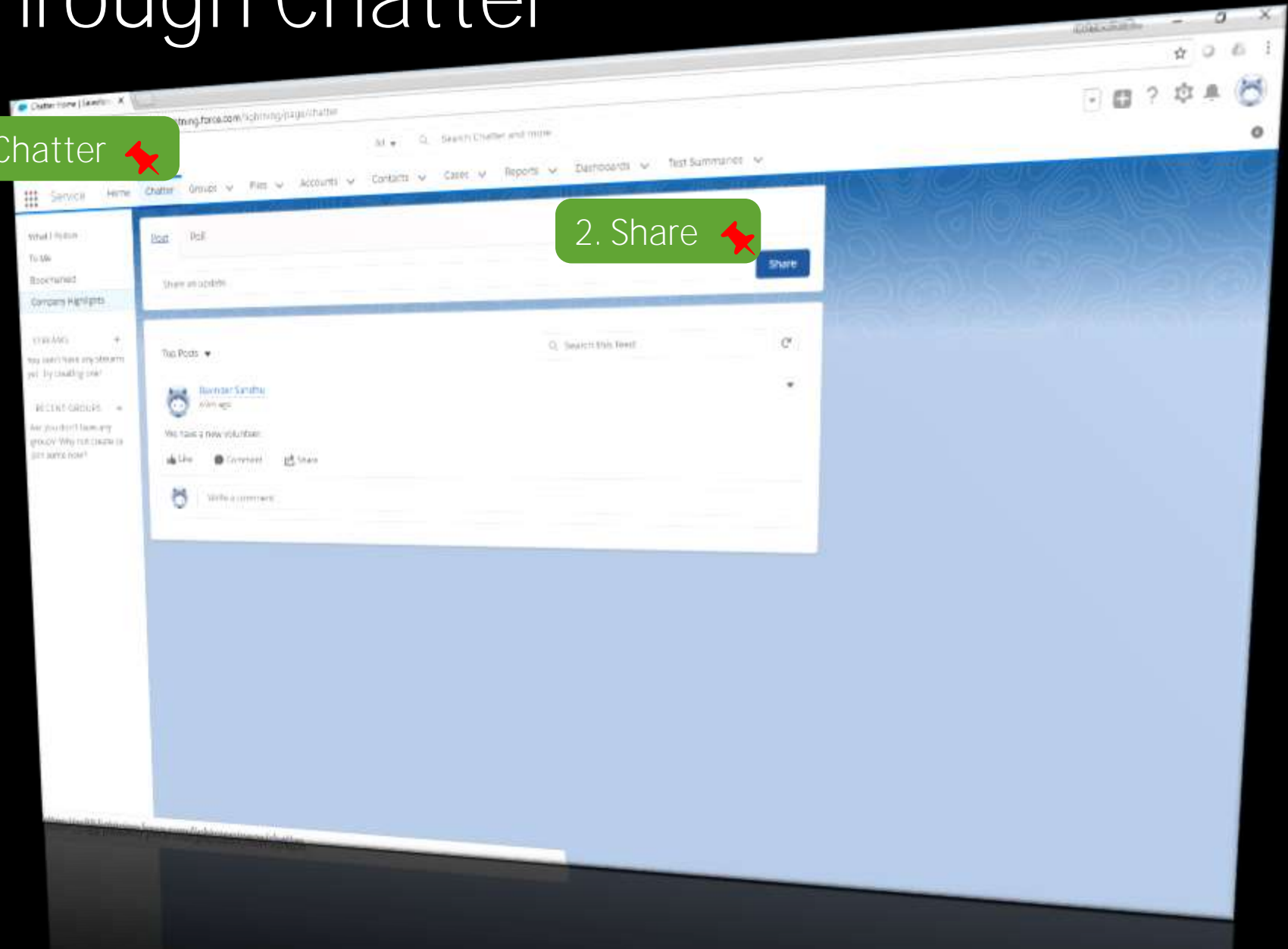
To follow others' posts shared across Oxfam, create a Stream.

To restrict posts to a community of people, create a Group.

1. Chatter



2. Share



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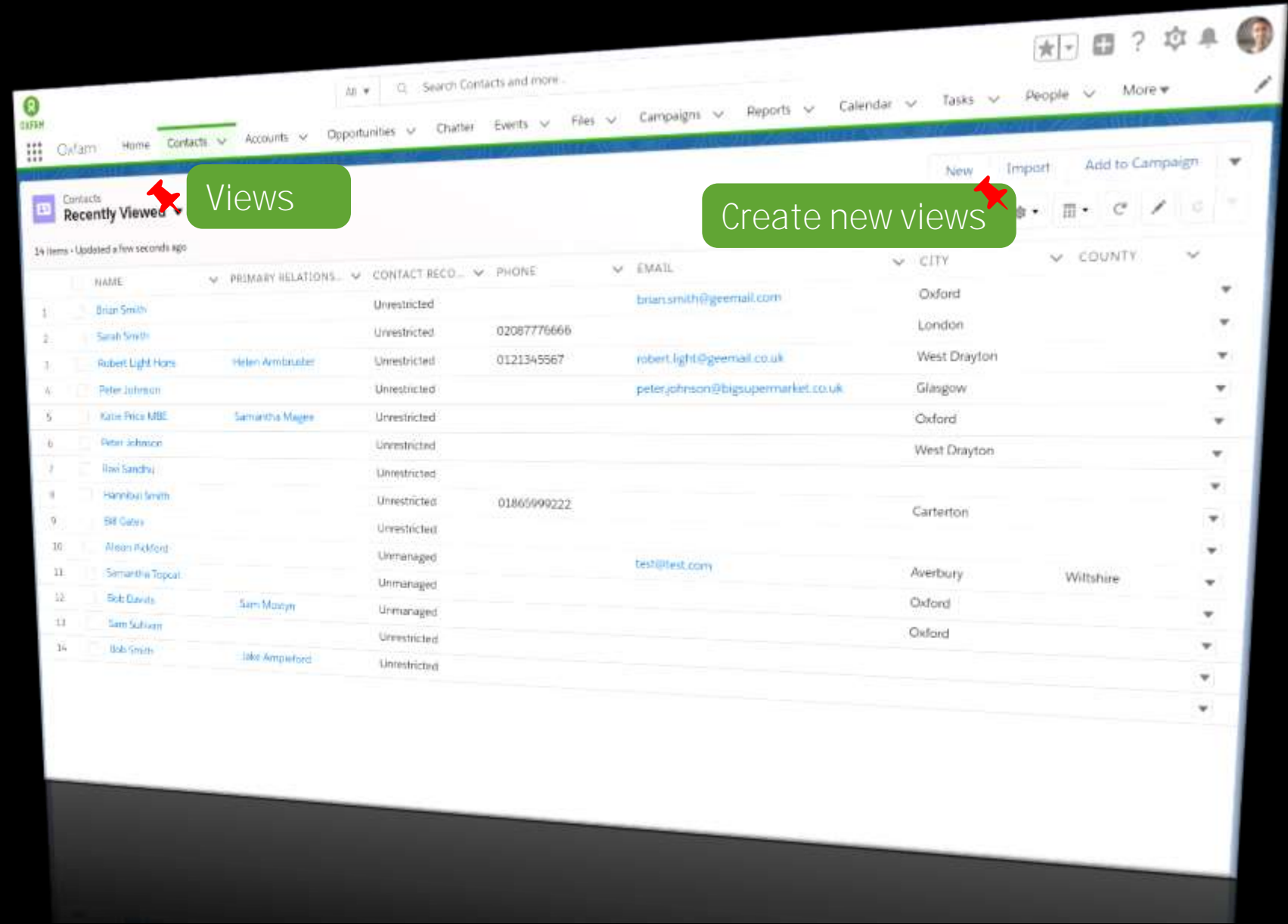


List views

Applications like Contacts, Accounts Opportunities and Events and more display as a list.

Find the views created amongst your organisation in Views.

Create new views, add filters and modify the fields displayed.



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Contacts and Accounts

Contacts are:

1. Supporters
2. Primary contacts at organisations

Accounts are affiliated organisations



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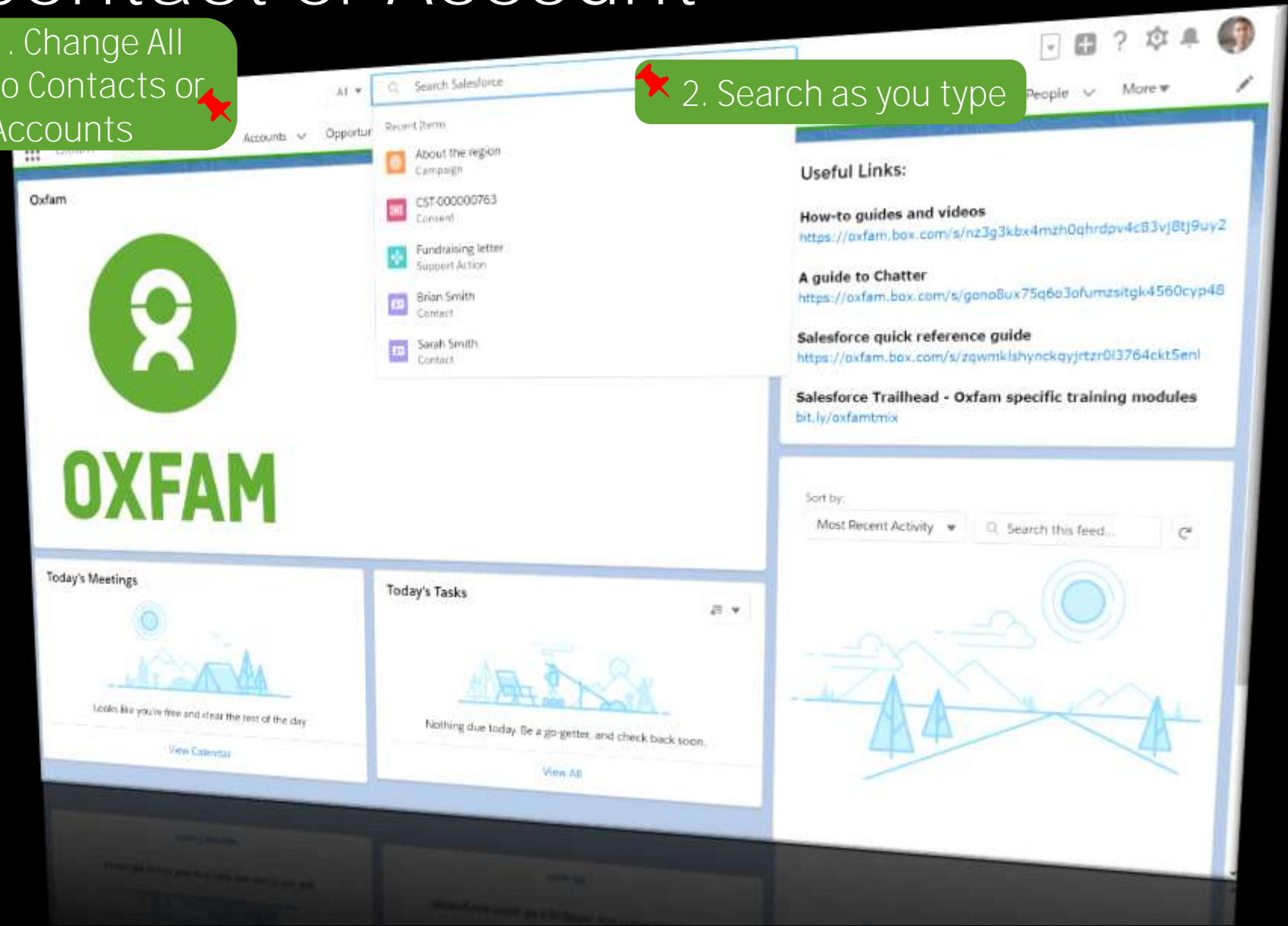
Search for a Contact or Account

Display a search result of supporters.

On the search results refine the details.

1. Change All to Contacts or Accounts

2. Search as you type

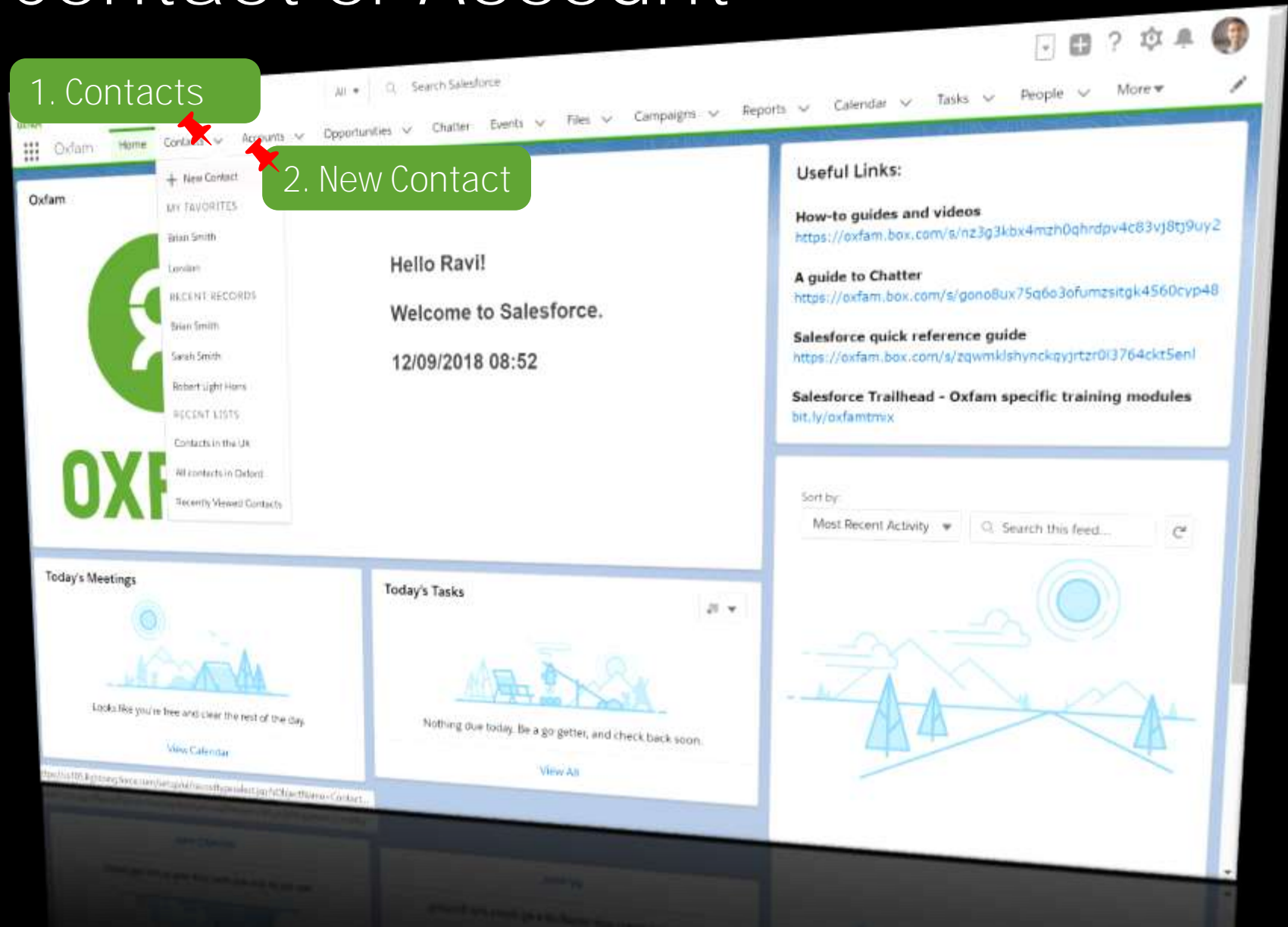


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Set up a new Contact or Account

1. Select New Contact/Account
2. Enter all information and select Save



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Edit a Contact or Accounts related items

1. Select the Contact or Account
2. Select Related
3. Add/modify related items

1. Contacts

2. Related

3. Add/Edit

Related List Quick Links

- Relationships (5)
- Organization Affiliations (5)
- Consent Details (1)
- Opportunities (10+)
- Campaign History (1)
- Recurring Donations (1)
- Event Registrations (Contact) (3)
- Event Registrations (Invited by External) (1)

Show All (18)

Open Activities (6+)

SUBJECT	RELATED TO	DATE	STATUS
Call Brian		21/08/2018	In Progress
Call supporter		22/08/2018	In Progress
Follow up with Brian Smith		24/08/2018	In Progress
Send List	Angie	30/08/2018	Not Started
Send an email with all the i	Angie	30/08/2018	In Progress
Contact him		31/08/2018	Not Started

Next Steps

- Call supporter (22-Aug)
- Call Brian (21-Aug)

Past Activities

- About the subject (15:00 | Yesterday)

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Add a Pipeline

1. Select Opportunities
2. Select New
3. Pipeline
4. Complete the form with as much as you currently know

1. Opportunities

2. New

Opportunities Recently Viewed

4 items • Updated a few seconds ago

	OPPORTUNITY NAME	ACCOUNT NAME	AMOUNT	STAGE	CLOSE DATE	OPPORTUNITY RECO...
1	From the big supermarket		£15,000.00	Unsuccessful	06/09/2018	Pipeline Lost
2	Pakistan Projects Direct 18/19	Garford Trust	£50,000.00	Ask	04/09/2018	Pipeline
3	Tuesday's Gift	Miggins Household	£100.00	Posted	21/08/2018	Donation
4	Samantha Topcat Donation 8/20/2018	Price Household	£20.00	Posted	20/08/2018	Donation

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Modify a Pipeline

1. Modify the fields in Details and Related
2. Change the stage

The screenshot shows the Salesforce interface for an Opportunity record titled "From the big supermarket". The record is currently in the "Unsuccessful" stage. The page layout includes a top navigation bar with various tabs like Home, Contacts, Accounts, Opportunities, Chatter, Events, Files, Campaigns, Reports, Calendar, Tasks, People, and More. Below the navigation bar, there's a section for the Opportunity details, including fields for Amount (£15,000.00), Close Date (06/09/2018), and Stage (Unsuccessful). A green callout box labeled "2. Modify stage" points to the "Unsuccessful" stage button. Below the details section, there's a "Details" tab with a "Donation Information" section. A green callout box labeled "1. Fields" points to the "Details" tab. The "Details" section includes fields for Opportunity Name, Account Name, Primary Contact (Peter Johnson), Close Date, Amount, Probability (%), Risk Adjusted Value, and Attribution Code. On the right side of the page, there's an "Activity" section with a "Compose" button and a "Next Steps" section with a "Next Steps" button. The "Next Steps" section contains the text: "No next steps. To get things moving, add a task or set up a meeting." The "Past Activities" section contains the text: "No past activity. Past meetings and tasks marked as done show up here."

2. Modify stage

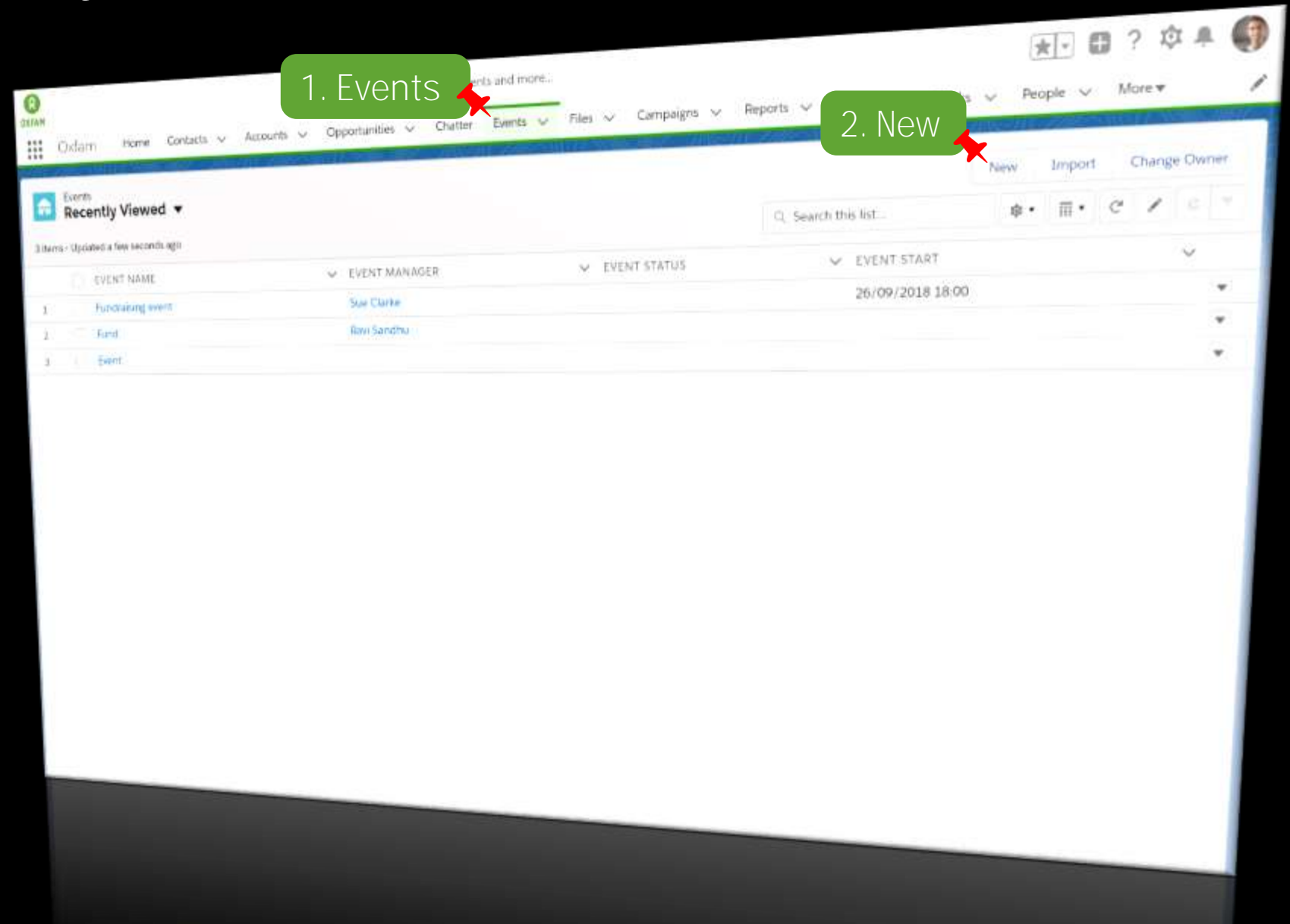
1. Fields

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Create an Event

1. Select Events
2. Select New

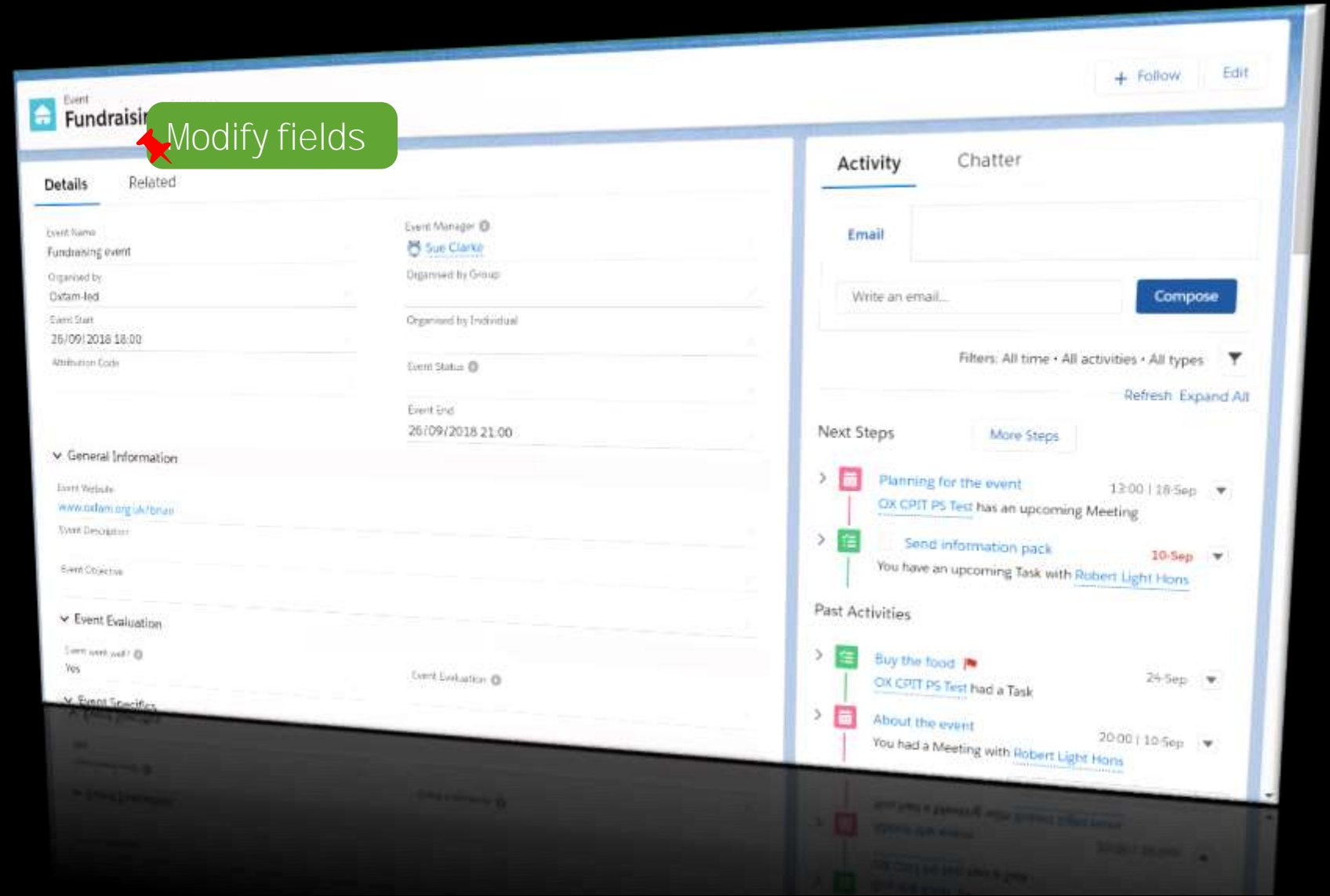


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Modify an Event

1. Select the Event
2. Modify the details
 1. Event Registrations
 2. Speakers
 3. Support Actions
3. Add related items such as



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Log a Campaign

1. Select Campaigns
2. Select New
3. Complete the details for the campaign

The screenshot shows the Salesforce Campaigns page. A green callout box labeled "1. Campaigns" points to the "Campaigns" tab in the top navigation bar. Another green callout box labeled "2. New" points to the "New" button in the top right corner of the page. The main content area displays a table of recently viewed campaigns.

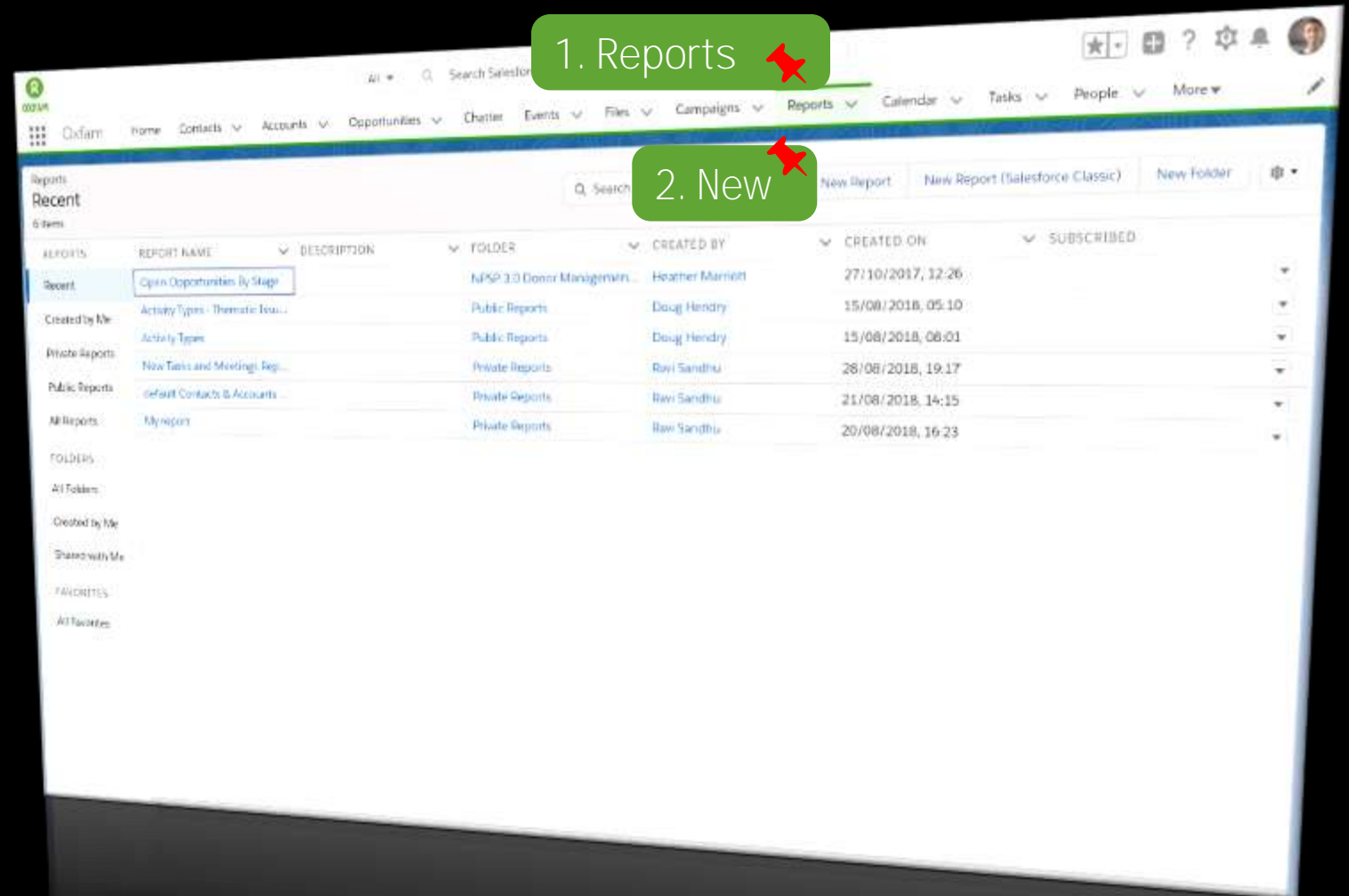
	CAMPAIGN NAME	STATUS	START DATE	END DATE	CHANNEL	CONT.	LEADS	RESPO.	WON	CAMPAIGN RECORD
1	About the region	Requested	17/09/2018	30/11/2018	Conference	0	0	0	0	Mass Communication
2	About the country	Requested	30/08/2018	28/09/2018	Conference	0	0	0	0	Mass Communication
3	The country campaign	Requested	03/09/2018	26/10/2018	Email	0	0	0	0	Mass Communication
4	2018 Direct Mail - Trade Defens (Spring)	Open	14/03/2018	22/08/2018		6	0	1	0	Mass Communication

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Create a Report

1. Select Reports
2. Select New
3. Choose the report types



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Modify a Report

Edit a report

1. Modify the Outline/fields
2. Modify the Filters
3. Save
4. Run

1. Outline/fields

2. Filters

3. Save

4. Run

Stage	Opportunity Name	Type	Lead Source	Amount	Close Date	Next Step	Probability (%)	Fiscal Period	Age	Created Date	Opportunity Channel
Contact (1)	In Kind Gift Fund	New Funding			11/08/2018		50%	Q3 2018	30	11/08/2018	New Funding
Subtotal				£0.00							
Total (1)				£0.00							

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Administrators

1. Access Admin Setup
2. Select Users
3. Choose user(s)
4. Reset password(s)

2. Users

3. Select user

4. Reset Password

1. Setup

The screenshot shows the Salesforce Admin Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar contains various setup options like 'Quick Find', 'Setup Home', 'Lightning Experience', 'ADMINISTRATION', 'Users', 'Permissions Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Platform Tools', 'Apps', 'Feature Settings', 'Environments', 'Objects and Fields', 'Process Automation', 'User Interface', and 'Custom Code'. The main content area is titled 'SETUP Users' and 'All Users'. It includes a table of users with columns for Name, Email, Last Login, Role, Active, and Profile. A red arrow points to the 'Setup' button in the top right corner. Another red arrow points to the 'Users' link in the left sidebar. A third red arrow points to the 'Reset Password(s)' button above the user list. A fourth red arrow points to a user row in the list.

Name	Email	Last Login	Role	Active	Profile
Admin Setup	admin.setup@oxfam.org.uk	01/05/2018 10:33	Admin	✓	Admin Only
Ah, Susha	ash1@oxfam.org.uk	30/08/2018 10:15	PAE	✓	PAE
James, Zane	zane1@oxfam.org.uk	16/08/2018 09:47	CNT	✓	CNT
James, Zane	zane1@oxfam.org.uk	11/09/2018 17:15	PAE	✓	PAE
James, Zane	zane1@oxfam.org.uk	30/08/2018 15:02	Regional Engagement	✓	Regional Engagement
James, Zane	zane1@oxfam.org.uk	09/09/2018 14:08	System Administrator	✓	System Administrator
James, Zane	zane1@oxfam.org.uk	09/09/2018 14:18	Regional Engagement	✓	Regional Engagement
James, Zane	zane1@oxfam.org.uk	28/08/2018 15:28	Standard User	✓	Standard User
James, Zane	zane1@oxfam.org.uk	13/09/2018 07:43	PAE	✓	PAE
James, Zane	zane1@oxfam.org.uk	06/09/2018 10:12	System Administrator	✓	System Administrator
James, Zane	zane1@oxfam.org.uk	04/08/2018	Standard User	✓	Standard User