OXFAM

YOUR GUIDE TO SALESFORCE

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.
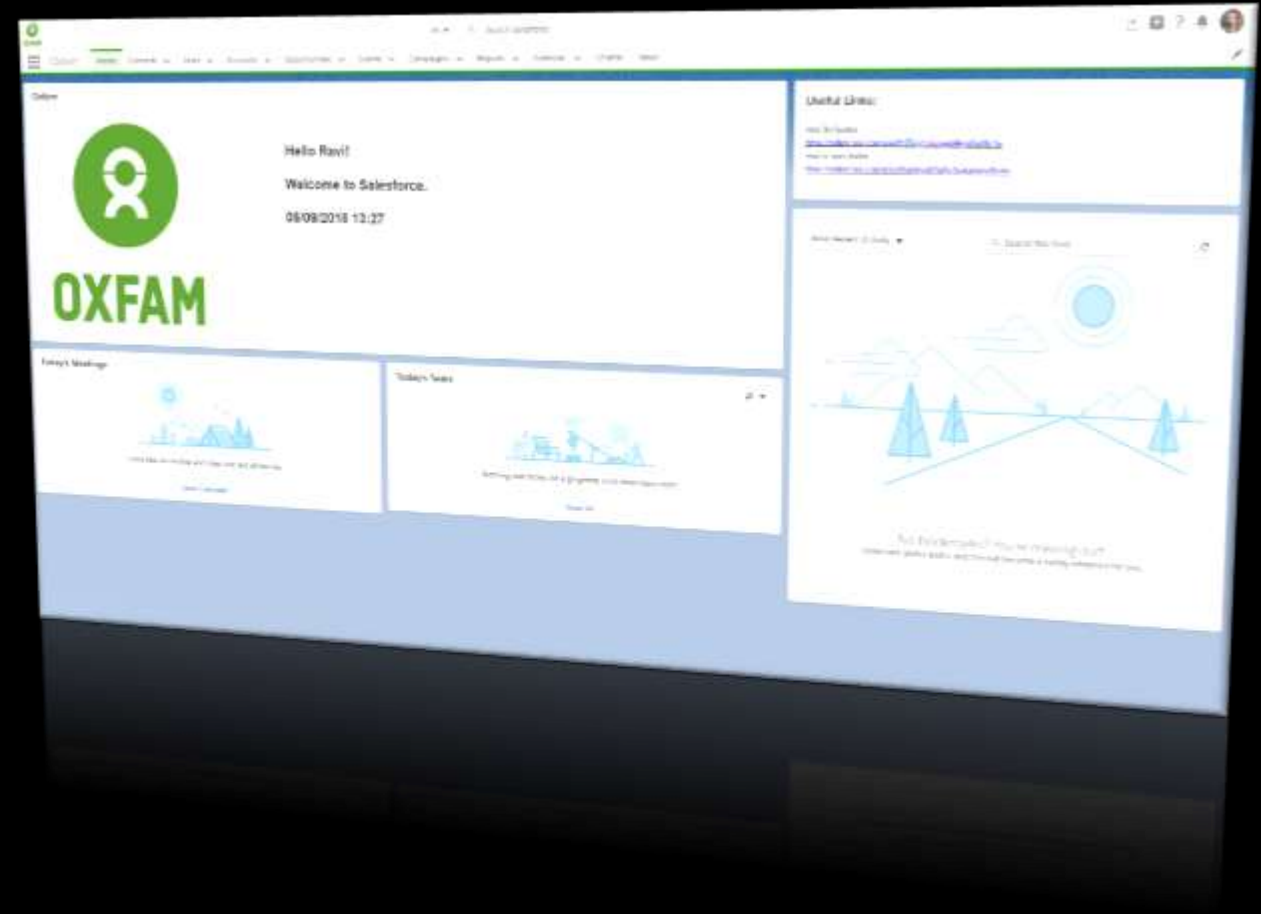
Log in

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

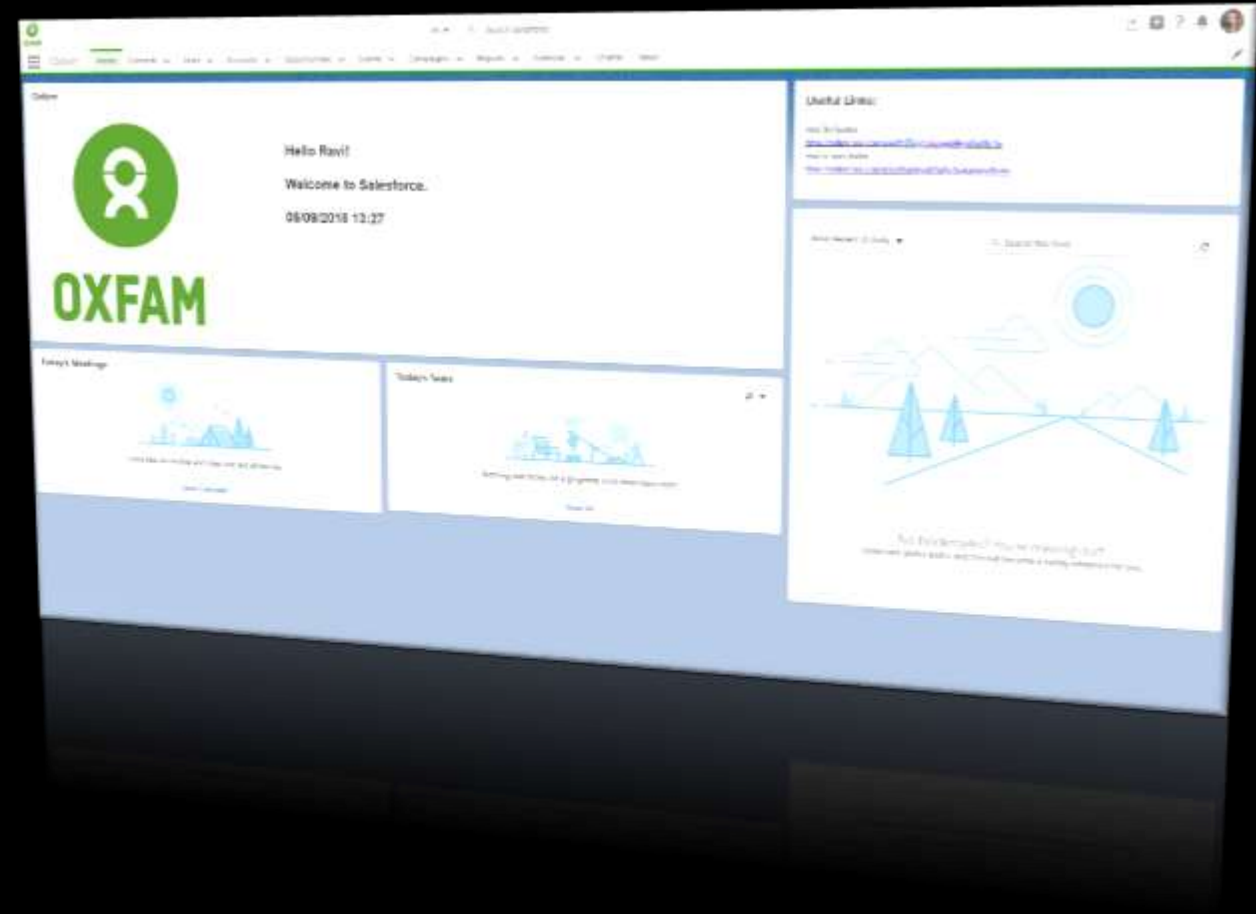What is my username?

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).

[Watch video](#)

A look around

Favourites

Global Actions

Notifications

Global Search

Apps Launcher

Links for help

Useful Links:

How To Guides
https://oxfam.box.com/s/wil11j0wp1qjzngvkhhvk8at8u1w
How to use chatter
https://oxfam.box.com/s/hzr5bapfvydh0gfhc3udwkxhx6to4e

Oxfam   Home   Contacts   Tasks   Accounts   Opportunities   Events   Campaigns   Reports   Calendar

Hello Ravi!

Welcome to Salesforce.

05/09/2018 13:27

OXFAM

Today's Meetings

Looks like you're free and clear the rest of the day.

View Calendar

Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

View All

Most Recent Activity

Search this feed...

No bookmarks? You're missing out!
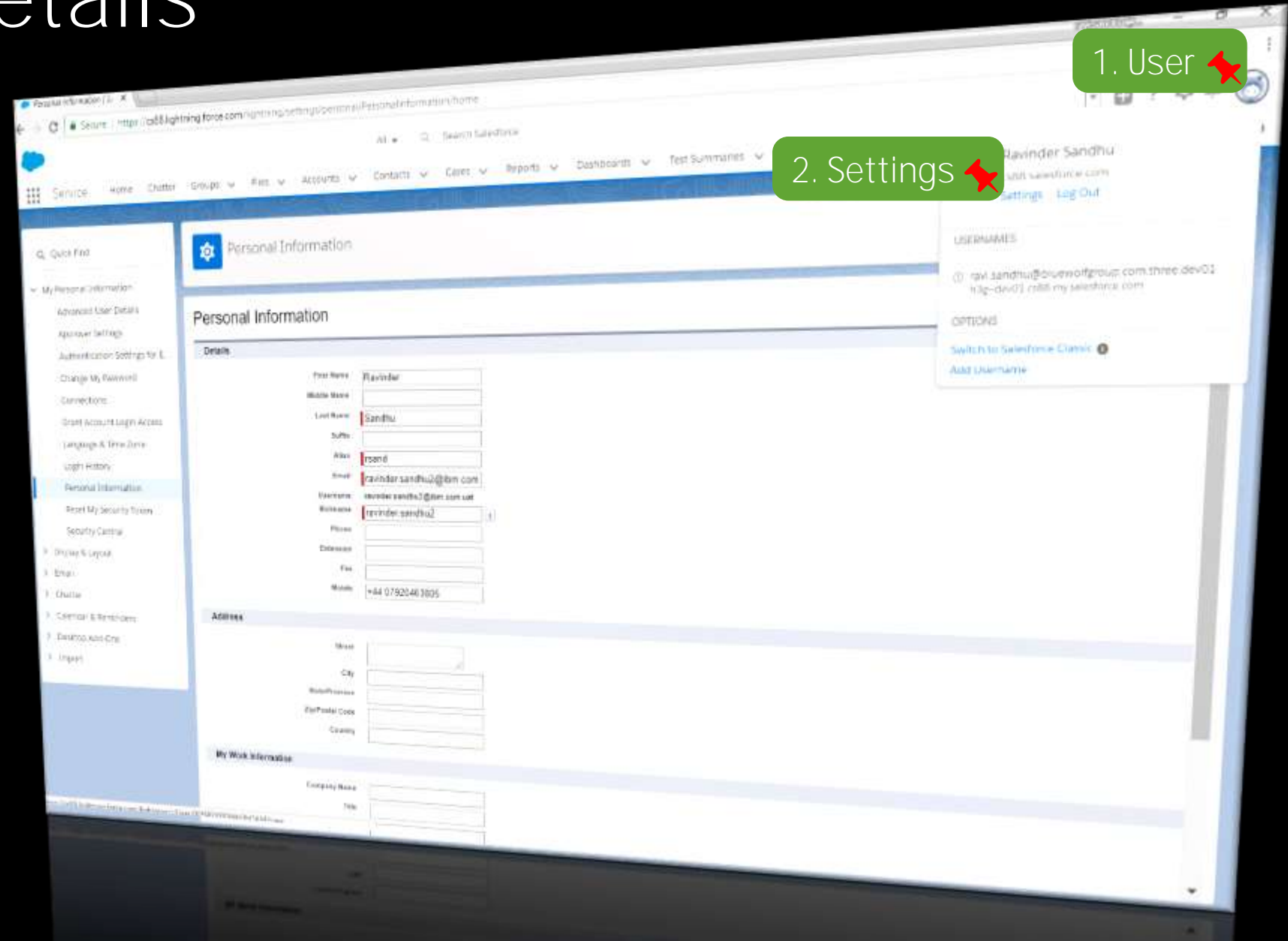Bookmark useful posts, and this will become a handy reference for you.

Watch video

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.
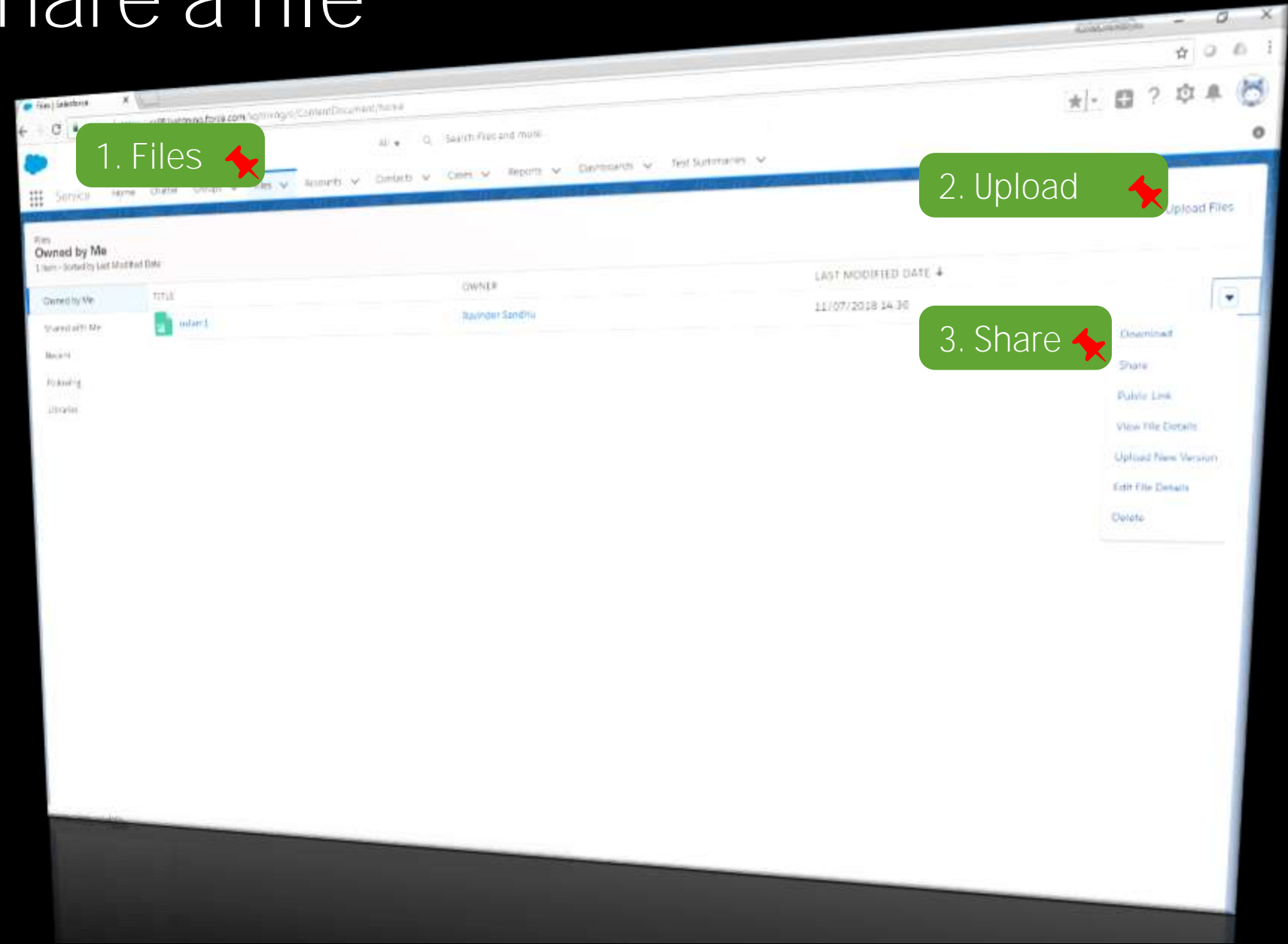
Upload and share a file

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**.

1. Files

2. Upload

3. Share

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.

1. Compose
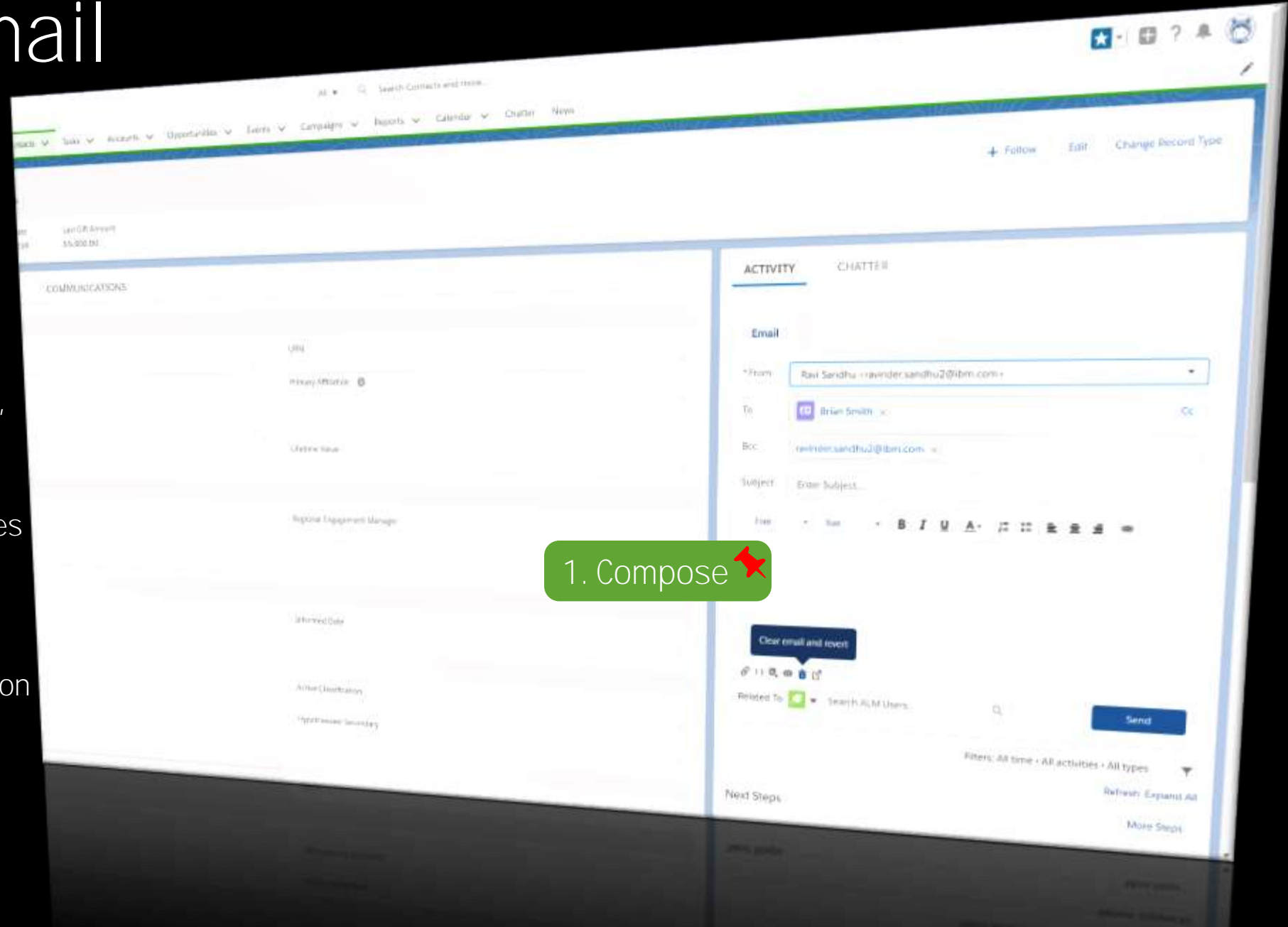
Collaborate through Chatter

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
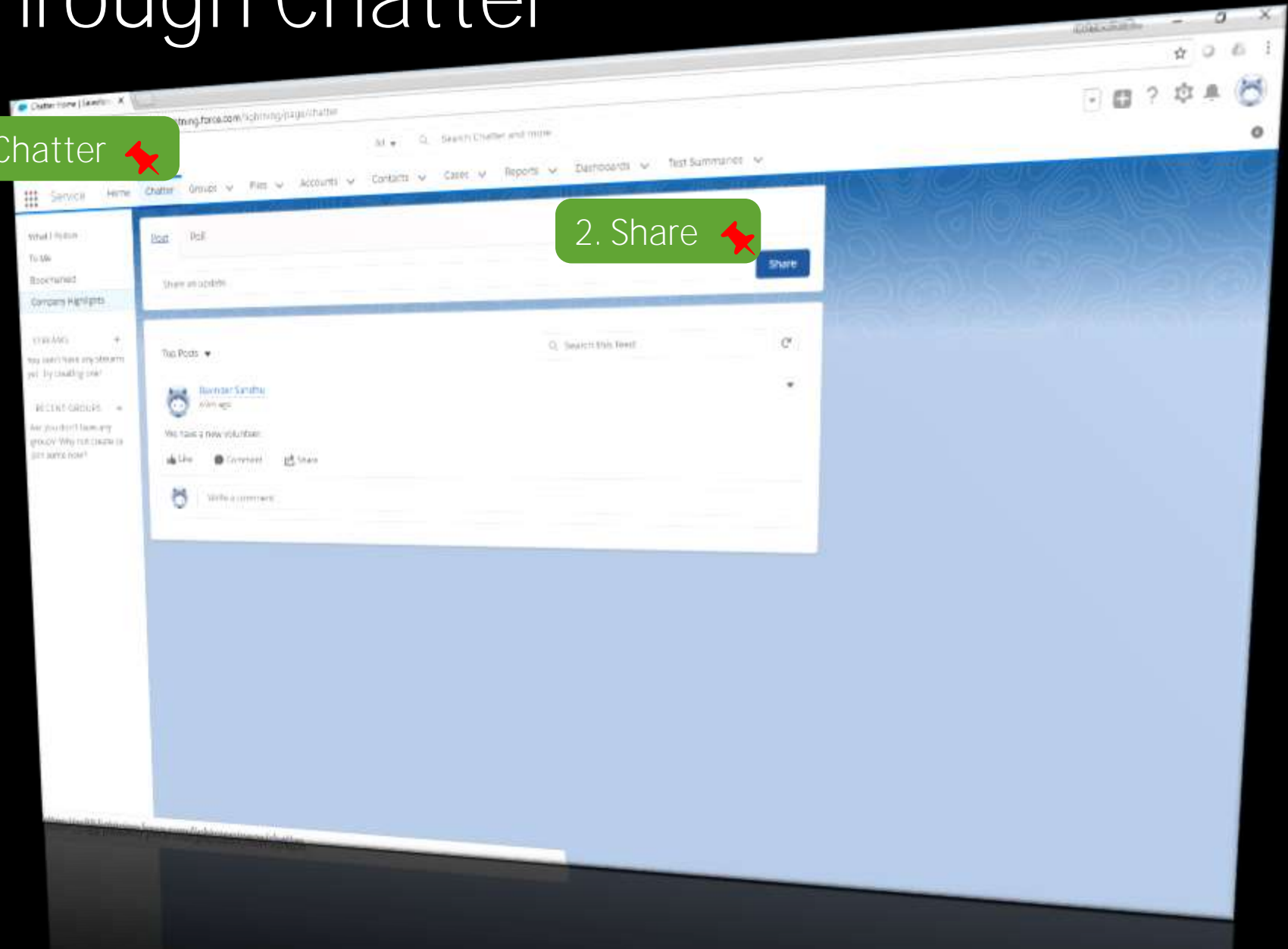
Watch video

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.

Watch video

Views

Create new views
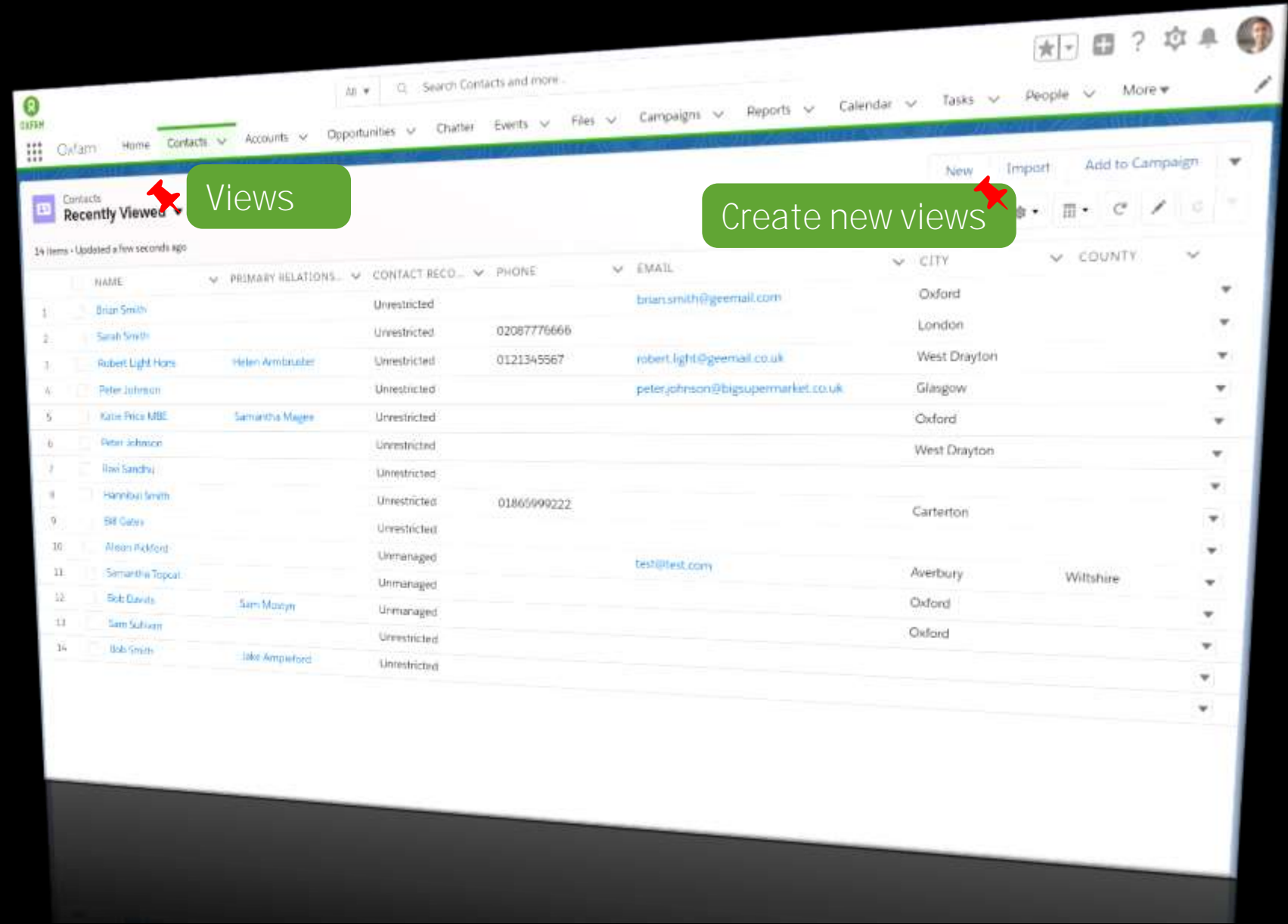
Contacts and Accounts

Contacts are:

1. Supporters
2. Primary contacts at organisations

Accounts are affiliated organisations

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Khalid al-Said Oxfam

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
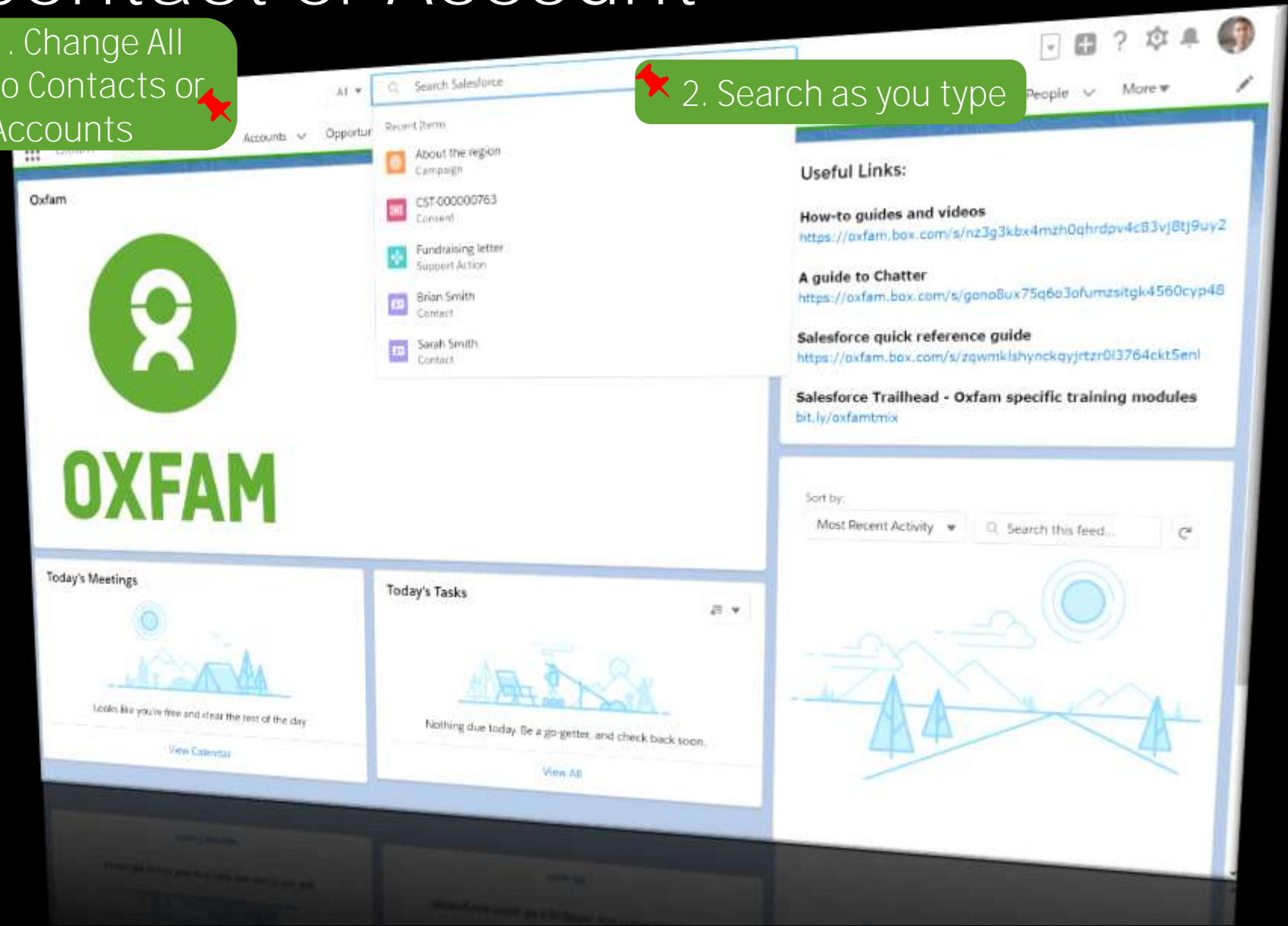
Watch video

Set up a new Contact or Account

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

1. Contacts

2. New Contact
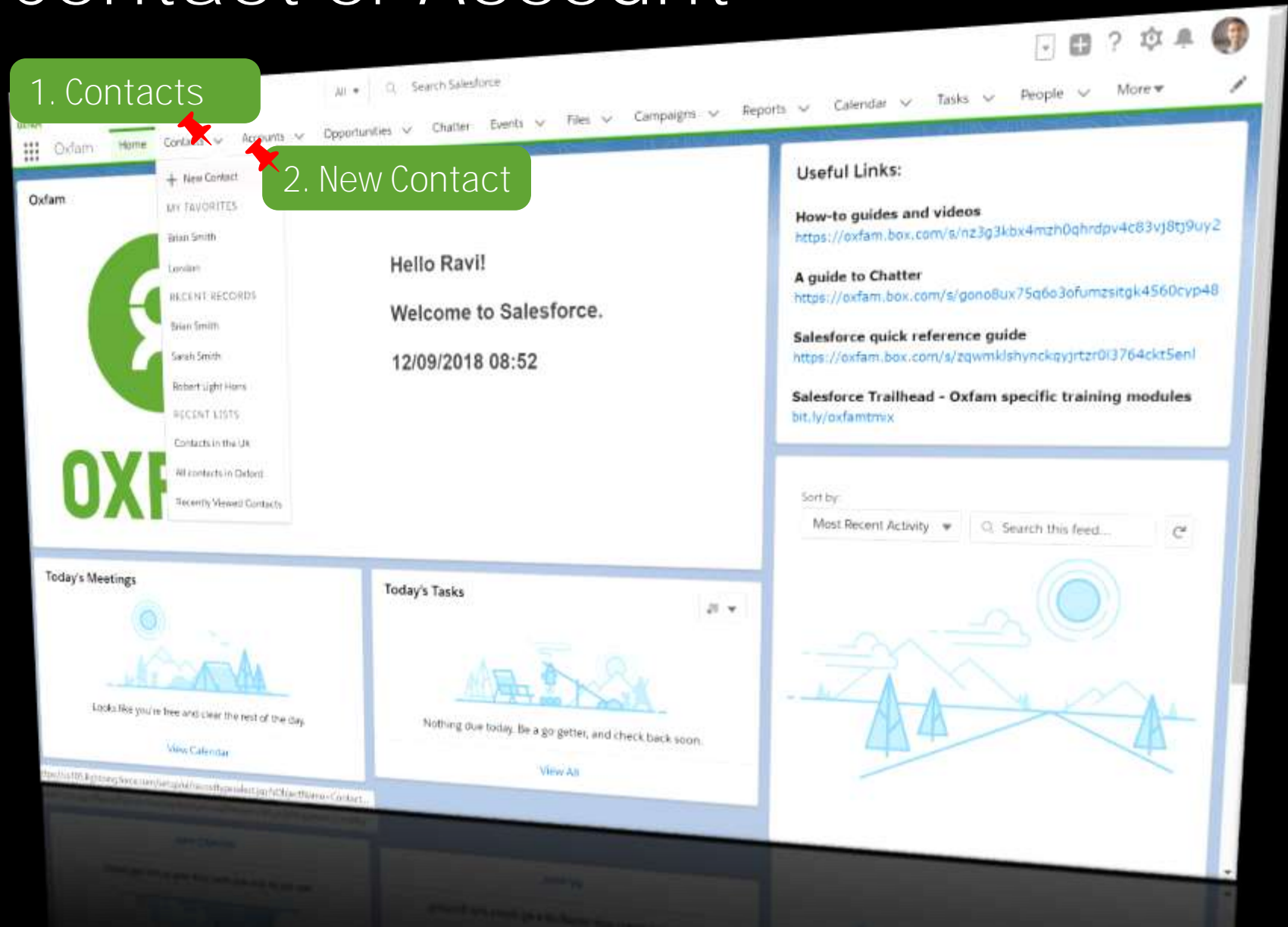
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Edit a Contact or Accounts related items

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

Watch video

Add a Pipeline

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

Watch video

Modify a Pipeline

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

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Create an Event

1. Select Events
2. Select New
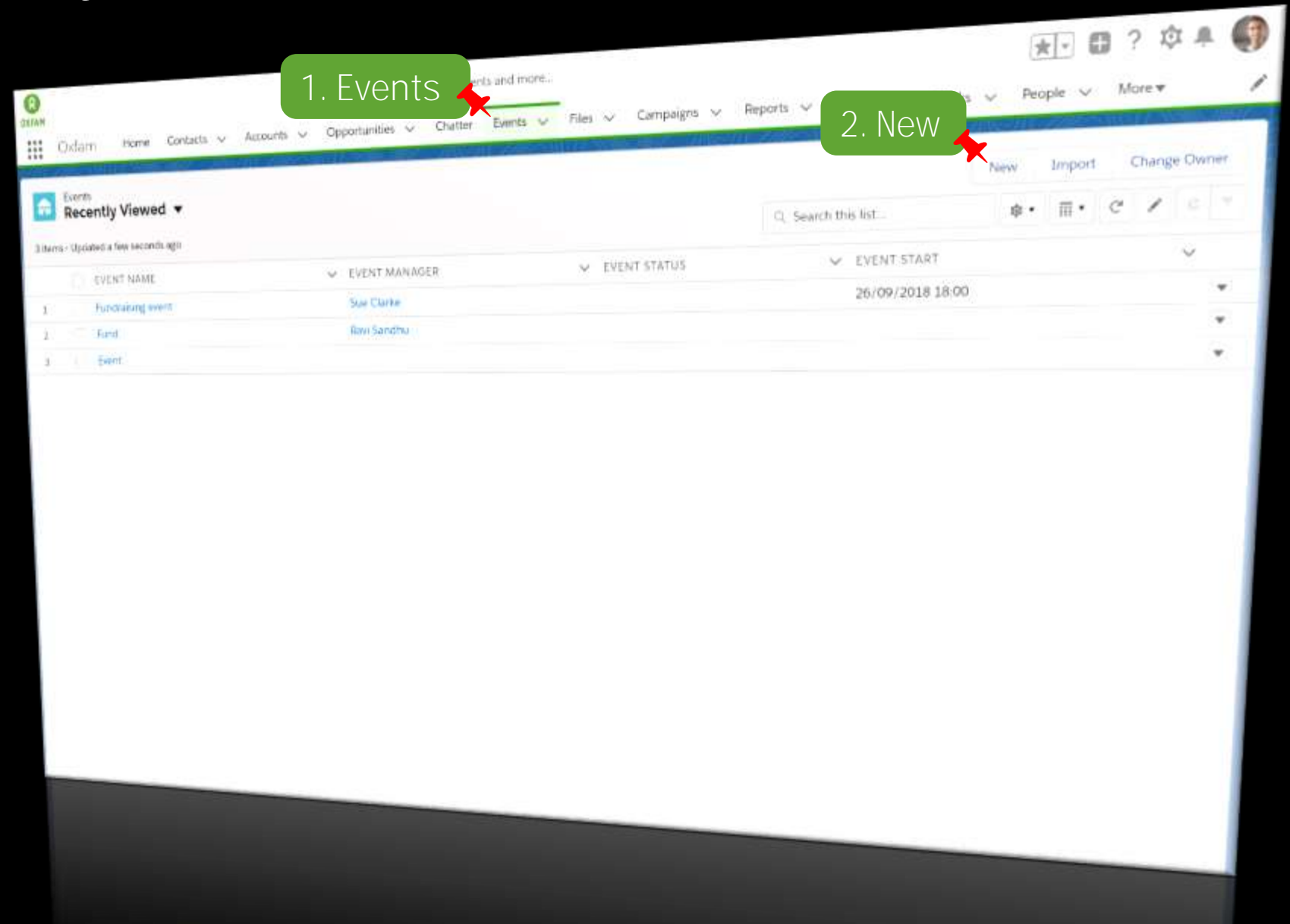
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Modify an Event

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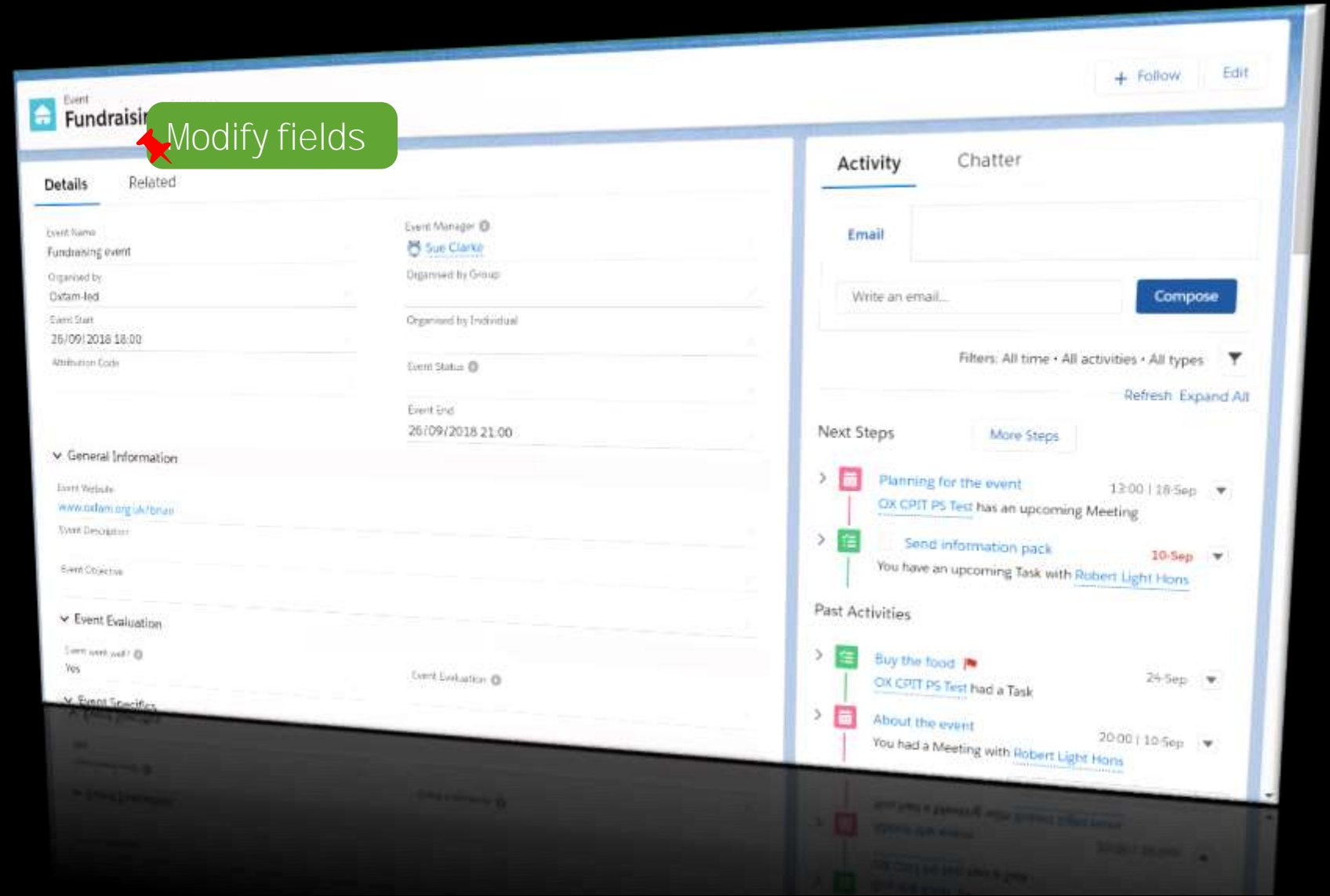
Watch video

Log a Campaign

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

Create a Report

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

1. Reports

2. New
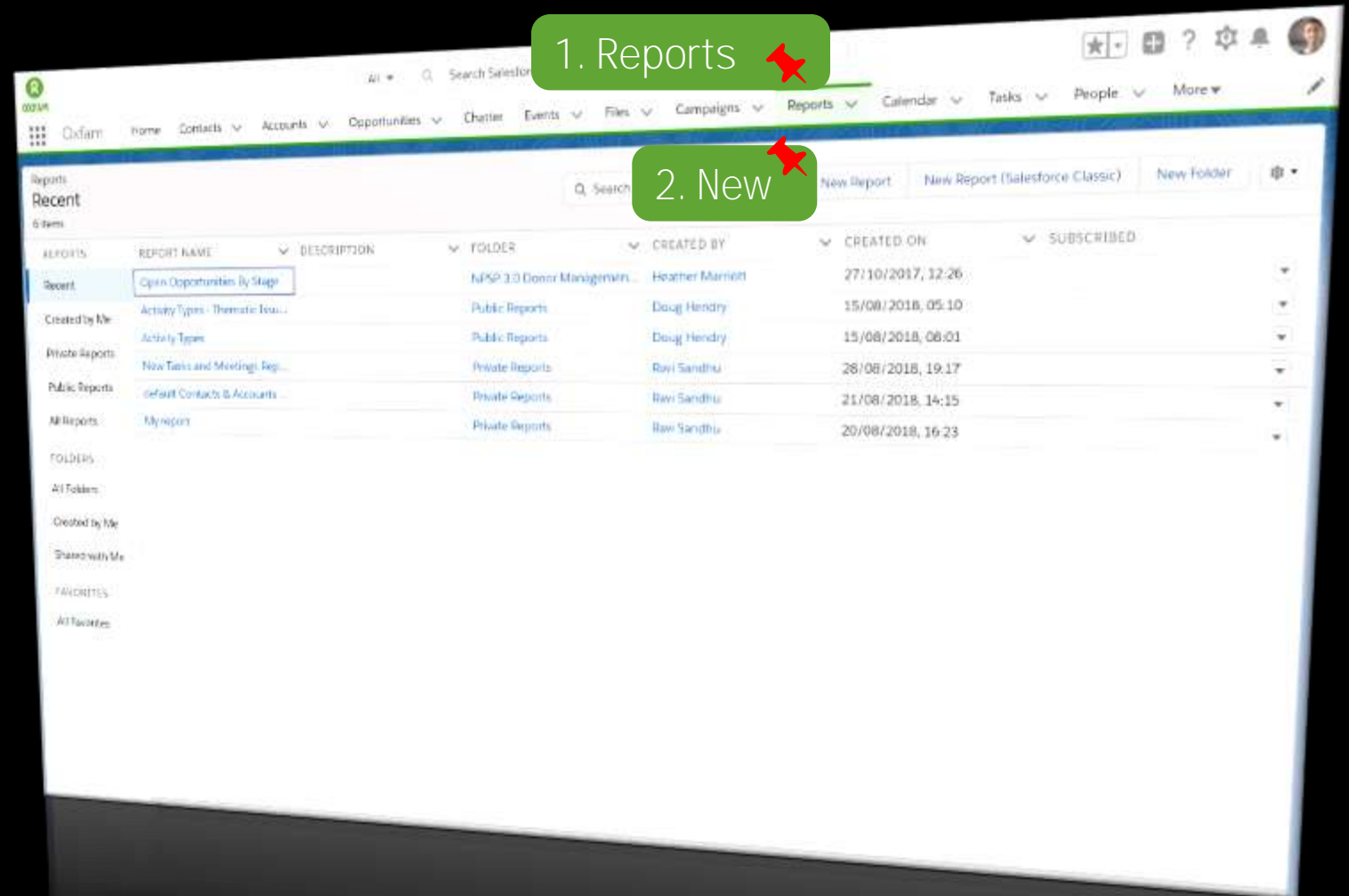
Watch video

Modify a Report

Edit a report
1. Modify the 0utline/fields
2. Modify the Filters
3. Save
4. Run

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Administrators

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

1. Setup

2. Users

3. Select user

4. Reset Password