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Customer & Carrier Setup Tutorial

Customer:

Use the below steps to setup a new customer in Salesforce.

Before creating any new contacts, be sure no duplicates exist. If they do verify with the information you have, then update, the steps are the same as below.

1. Sign into Salesforce and click "Accounts" object at the top of the page.
2. Now click "New" just below and to the right of step 1.
3. Fill in as many fields as possible, if more info is needed, email the customer or speak with your manager.
4. Finally, click "Save!"

For more information, you may review the video here.

Customer Contact:

You can follow the steps outlined below to manually create a new customer profile in Salesforce.

1. Once logged into Salesforce, click the "Contacts" tab at the top of the screen, then select "New."
2. IN the following pop-up, fill in the following area and the fields inside; Contact Information, Details, Address Information, Additional Information, and Marketing Preferences (if applicable) and click "Save."

* If the customer was found via ZoonInfo, the above steps are not needed. Once a lead is booked with a Zoom prospect, Salesforce will automatically fill in most of the necessary fields. *

Carrier:

The process for inputting new carrier information is outlined below. For further details, watch this video.

1. In SalesForce, click "Contacts" and fill these areas; Contact Information (Last Name is used for Carrier Name); Details; Address Information; Carrier Details. Then click "Save."
2. Once the Carrier Contact has been inputted, navigate to the left of the screen to "Notes & Attachments" and click "Upload Files."

- * The carrier will provide their "Carrier Packet," if one has not been received, request it and continue when it has been. *

3. Open you Downloads folder in the File Explorer when it pops-up, select the file the carrier sent and click "Open."