Create New Organisations QRG

Organisations Overview

In Salesforce.com, Customers and Business Contacts are referred to as **Organisations** and **Individuals** respectively. This QRG looks at Organisations.

As part of managing Organisations in Salesforce.com, you will need to create new Organisations and edit and update existing ones.

When do I perform this?

You should add a new Organisation when you become aware of a company that has a relationship with Australia Post. This could be an organisation that is a supplier, a competitor, or a prospect.

What has to happen before I perform this?

Before you add any records into Salesforce.com, you must first search to ensure what you are about to create does not already exist.

No Duplicates….Ever!

Under no circumstances should duplicate records be entered into Salesforce.com.

If the record exists in Salesforce.com but only details have changed, edit the existing record – do not create a new one.

Organisations

Organisations can be Customers, Suppliers, Competitors, Prospects or Partners. They can be one or more of these, but only one of a Prospect or Customer.

Locating Organisations

The following steps outline how to begin to work with Organisations.

- Click the **Individuals and Organisations** Navigation Tab.

Individuals and Organisations you have recently viewed display in the **Recent Individuals and Organisations** section.

Use the Views drop-down menu to filter the list of Individuals and Organisations to show specific results; for example, All Individuals and Organisations, New this Week etc.

- Locate the required Organisation and click the **Name** link.

The Organisation's details display.

Organisation Information

Scrolling down, there are a number of sections on the Organisation screen providing you with a range of details.

Organisation Detail

The Organisation Detail section displays basic Organisation information such as address information. The following steps outline how to manipulate the information that displays in the Organisation Detail section:

- Gain some screen real estate by clicking ▼ to collapse any section.
- Expand collapsed sections by clicking ▶
- Edit any field in the Organisation Detail section by double clicking to open **In Place Editing**.

Open Activities

Open Activities displays any open Activities relating to the Organisation and/or any Opportunities.

- Click the **Subject** of any Activity to view more information.
- Click **New Task** to create new task for the Organisation.
- Click **New Event** to create a new event for the Organisation.

See the Activities QRG and the Events QRG for more information.

Opportunities

Lists all Opportunities currently open for the Organisation.

- Click any **Opportunity Name** to view more information.
- Click **New Opportunity** to create a new Opportunity for the Organisation.

See the New Opportunities QRG for more information.

Account Plans

- Click any **Account Plan Name** to view more information.
- Click **New Account Plan** to create a new Account Plan.

See the Work with Individuals and Organisations QRG for more information.

Roles

A Role is a category of relationship the Organisation has with Australia Post.

- Click New Role to create a new Role

See the Work with Individuals and Organisations QRG for more information.

Relationships

A Relationship describes the link between two Organisations, two Individuals or an Individual and an Organisation.

- Click any **Relationship** to view more information.
- Click New to create a new Relationship.

See the Work with Individuals and Organisations QRG for more information.

Activity History

The Activity History displays all completed tasks for the Organisation.

- Click the **Subject** of any Activity to view more information.
- Click Log A Call to record the outcome of an unplanned phone call as an Activity.
- Click Send An Email to send an email and associate it with the Organisation as an Activity.

See the Activities QRG for more information.

Billing Accounts

Billing Account s are linked to Australia Post customers and provide for reporting of booked revenue in future phases of Salesforce.com enhancement.

Billing Accounts are added to Salesforce.com automatically from SAP ERM and are for reference only.

- Click any **Billing Account #** for more information.
- Click New Billing Account to create a new Billing Account.

See the Work with Individuals and Organisations QRG for more information.

Notes and Attachments

Add Notes or attach documentation or marketing collateral to the Organisation.

- Click any **Title** to view the note or document.
- Click New Note to add a new note.
- Click Attach File to attach a file.

See the Work with Individuals and Organisations QRG for more information.

Hovering the Hovers

The Hovers at the top of the Organisation screen reproduce all of the sections, and the options, that display if you scroll down.

For a quick snapshot, use the Hovers.

Create a New Organisation

If you are recording interactions with an Organisation that does not currently exist in Salesforce.com, you must create a new Organisation.

The following steps outline how to create a new Organisation.

1. Click the **Individuals and Organisations** Navigation Tab.
2. Search for the new Organisation to ensure it does not already exist in Salesforce.com.
3. If the Organisation does not exist in Salesforce.com, click New

The **Select Sector** screen displays.

4. Complete all mandatory and other relevant fields.

Select Sector fields are described in the table below; edit or validate fields as required. Mandatory fields are **bolded**; instructions for completing each field are presented in bullet points.

Field	Definition
Select Sector	
Record Type of new record	Denotes whether the new entity is an Individual or Organisation. • Click in the **Record Type of new record** drop-down menu and select **Organisation**.

5. Click Continue

- To cancel without saving, click Cancel

The **New Individual and Organisation** screen displays.

6. Complete all mandatory and other relevant fields.

New Individual and Organisation fields are described in the table below; edit or validate fields as required. Mandatory fields are **bolded**; instructions for completing each field are presented in bullet points.

Field	Definition
Organisation Detail	
Name	Name of the Organisation. • Click in the field and type the name of the Organisation.
Phone	The Organisation's phone number. • Click in the field and type the Organisation's phone number.
Account Manager	Australia Post employee responsible for this Organisation; this is a read-only field.
Email	Organisation's email address. • Click in the field and type the Organisation's email address.
Number	Tracking or reference number for the Organisation. • Click in the field and type the Organisation's

Field	Definition
	Number.
Website	URL to the Organisation's website. • Click in the field and type the URL to the Organisation's website.
Trading Name	• Click in the field and type the Organisation's Trading Name.
Industry	Primary business of the Organisation. • Click the **Industry** drop-down menu and select the relevant option. • If applicable, click the **Industry Sub-Sector** drop-down menu and select the relevant option.
Alternate Name	• Click in the field and type the Organisation's Alternate Name.
Industry Sub Sector	If an Industry Sub Sector is applicable and is selected for the Industry set for the Organisation, it will display here; see the **Industry** field description for more information.
Sector	• Click the drop-down menu and select the relevant option.
Address Information	
Billing Street, City, State, Post Code, Country, DPID	Organisation's postal details used for billing related correspondence. • Click in the **Billing Street** field and type the Organisation's billing address street name and number. • Click in the **Billing City** field and type the Organisation's billing address city. • Click in the **Billing State** field and type the Organisation's billing address state.

Field	Definition
	• Click in the **Billing Postal Code** field and type the Organisation's billing address post code. • Click in the **Billing Country** field and type the Organisation's billing address country. • Click in the **Billing DPID** field and type the relevant information. • Click OK
Physical Street, City, State, Post Code, Country, DPID	Organisation's postal details used for general correspondence. Complete the same steps as described for the Billing Address information. If the Physical Address details are the same as the Billing Address details, click **Copy Billing Address to Physical Address**.
Additional Information	
Parent Organisation	Parent Organisation for Organisations that are subsidiaries. • Click in the field and type the Parent Organisation name. Alternatively: • Click to Lookup the Parent Organisation name.
Archiving Flag	• Click the check box.
Industry Sector (ANZSIC)	The Organisation's Australian and New Zealand Standard Industrial Classification code. • Click in the field and type the Organisation's Industry Sector (ANZSIC) code.
ABN	The Organisation's Australian Business Number. • Click in the field and type the Organisation's ABN.

Field	Definition
DUNS Number	• Click in the field and type the Organisation's DUNS number.
ACN	The Organisation's Australian Company Number. • Click in the field and type the Organisation's ACN.

7. Click Save

- To save and create another Organisation, click Save & New
- To cancel without saving, click Cancel

The new Organisation is created in Salesforce.com.