Work with Events QRG

SALES ACADEMY

Events Overview

This QRG is designed to help you understand when and how to use Events to manage activities relating to your Business Contacts and Opportunities.

When do I perform this?

Whenever you have date and time specific activity that is related to a business contact, Opportunity or other Australia Post activity, it must be added as an Event in Salesforce.com.

What has to happen before I perform this?

You need to be logged into Salesforce.com, or you must have your Salesforce.com to Outlook connector setup and running so Outlook events can be synced to Salesforce.com.

Prerequisites

You need access to Salesforce.com.

Locating Events

Activities you are required to complete display in a number of areas in Salesforce.com.

Home Page: scroll to the **Calendar** section to view Events by Date, Subject and what they are related to. You can view both Scheduled Meetings and Requested Meetings.

Reminder Window: The Reminder Window pops up when you access Salesforce.com to notify you of today's Events.

You can also view Events from within an Opportunity, Individual or Organisation; scroll to the **Open Activities** section to view Events.

Working with Events

Create an Event

The following steps outline how to create an Event.

1. Locate and open the relevant Salesforce.com area; for example an Opportunity, Organisation, Individual etc.
2. Scroll to the Open Activities section and click New Event

The **New Event** screen displays.

Event 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.

Navigation Tab	Definition
Calendar Details	
Assigned To	The assigned owner of Event; by default, the Event is assigned to its creator (the creator's name displays). You can also assign a meeting to a colleague to manage or create the meeting on behalf of someone else.
Related To	Record that the Activity is associated with; for example, an Opportunity. • Click the drop-down menu and select the relevant option. By default, the Salesforce.com object that was open when you clicked New Event displays in the second field. Click to use the lookup to edit this field.
Subject	Subject or short description of the Event. You can enter a subject or select from a pick list of defined subjects. • Click in the field and type relevant information. Alternatively: • Click and select a Subject from the combo box.

Navigation Tab	Definition
Name	Contact or Lead associated with the Activity. • Click the drop-down menu and select the relevant option. • Click in the field and type the relevant name. Alternatively: • Click and use Lookup to find the required person. Additionally: • Click **Add to Invitees** to add the person to the attendees list (bottom of the Event screen).
All Day Event	Specify if the Event will take up a full working day. • Click the checkbox.
Private	Marks the Event as Private; meaning its details will not be visible to any delegates of your invitees' calendars. • Click the check box.
Start	The Event start date and time. • Click in the field and use the calendar to select the start date. • Click the time drop-down menu and select a start time.
End	The Event end date and time. • Click in the field and use the calendar to select the end date. • Click the time drop-down menu and select an end time.
Other Information	
Location	The Location of the Event. • Click in the field and type an Event location.
Phone	The Phone number of the Salesforce.com area the Event relates to. This is a read only field.
Show Time As	How the Event displays in your invitees calendar. • Click the drop-down menu and select the relevant option.
Email	The Email address of the Salesforce.com area the Event relates to. This is a read only field.
Description Information	
Description	Description of the Event and any details that are relevant to the Invitees. • Click in the field and type any relevant information.
Recurrence	
Create Recurring Series of Events	• Click the checkbox.
Reminder	
Reminder	• Click the checkbox. • Click the drop-down menu and select a time for the Reminder.

3. When you have completed creating the Activity, click Save

- To cancel out without saving and changes, click Cancel.
- To save and create an additional Activity, click Save & New Task
- To save and create an Event, click Save & New Event
- To add related documents to the Activity, click Attach File

Only attachments specific to the Activity should be added here; for example, a meeting agenda. Large documents are best stored on the Australia Post network and a link added in Salesforce.com.

Invite Others

You can invite Leads, Contacts and other Salesforce.com users to Events you create. The following steps outline how invite others to an Event.

At this time not all Australia Post employees are using Salesforce.com, so invitees are ideally just business contacts or Leads who you manage through Salesforce.com.

1. Locate and open the relevant Event.
2. Click Add Invitees

The **Select event invitees** dialog box displays.

3. Click the **Search Within** drop-down menu and, if required, type search criteria in the **Search** field then click Go!

Individuals matching the search criteria you entered display.

4. Click the checkbox that corresponds with the required person.
5. Click Insert Selected
6. Search for and insert any other individuals you want to invite to the Event.
7. When all Individuals are inserted, click Done

- To cancel out without saving and changes, click Cancel