Edit Individuals and Organisations: QRG

SALES ACADEMY

Individuals and Organisations Overview

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

As part of managing Individuals and Organisations in Salesforce.com, you will need to edit and update both types of records.

When do I perform this?

Edit an Individual and/or Organisation's details when they change or you need to update existing or add new information; for example, an Account Plan, a Party Role or Relationships.

What has to happen before I perform this?

The Individual or Organisation must exist in Salesforce.com.

Edit and Update Individuals and Organisations

Over time, business addresses change and business contact roles and titles change. On these occasions we need to update their records in Salesforce.com

In-Place Editing

If you are updating existing information, remember you can use In-Place Editing to quickly update fields in Salesforce.com.

Account Plan

Add or Edit an Account Plan

The following steps outline how to add or edit an Account Plan.

1. Locate the relevant Individual or Organisation and view its details.
2. Click **New Account Plan** or click the Account Plan to be edited.

The **New Account Plan** screen displays.

3. Complete relevant fields listed in the table below.

Account Plan fields to be completed are described in the table below. Mandatory fields are **bolded**; instructions for completing each field are presented in bullet points.

Field	Definition
Information	
Account Plan Name	Name of the Account Plan. • Click in the field and type the relevant name.
Start Date	The date that the Account Plan is effective from. • Click in the field and use the calendar to select the start date.
Account	Name of the Individual or Organisation the Account Plan relates to. This field should default to the Individual or Organisation name; if not, click to lookup the relevant Individual or Organisation.
End Date	The date that the Account Plan ceases to be used from. • Click in the field and use the calendar to select the end date.
Status	• Click the drop-down menu and select the relevant option.
Impact	• Click the drop-down menu and select the relevant option.
Performance Measures	
Target	Target is the total target revenue we're seeking to achieve from this Customer during the period the Account Plan covers. • Click in the field and type the relevant value.
Opportunity Value	An auto-populated field that shows the total value of all Opportunities linked to this Account Plan. This is a read-only field.

4. Click **Save**

- To save and create another Account Plan, click **Save & New**

- To cancel without saving, click Cancel

The new Account Plan is created in Salesforce.com.

Generate an Account Plan Summary

The following steps outline how to generate an Account Plan summary.

1. Locate the relevant Individual or Organisation and view its details.
2. Click the relevant Account Plan.

The **Account Plan Detail** screen displays.

3. Click Generate Summary

A PDF version of the Account Plan displays. This can be saved and printed, emailed etc.

Roles

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

The following steps outline how to add or edit a Role.

1. Locate the relevant Individual or Organisation and view its details.
2. Click New Role or click the Role to be edited.

The **New Role** screen displays.

3. Complete relevant fields listed in the table below.

Party Role fields to be completed are described in the table below. Mandatory fields are **bolded**; instructions for completing each field are presented in bullet points.

Field	Definition
Information	
Organisation	Name of the Individual or Organisation the Role relates to. This field should default to the Individual or Organisation name; if not, click to use the lookup the relevant Individual or Organisation.
Role Type	• Click the drop-down menu and select the relevant option.

4. Click Save

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

The new Role Type is created and its screen displays.

Note the **Role Id Number**; this is a unique identifier for this Role Type for the Party.

5. Click the **Organisation** to return to the Individual or Organisation screen.

The new Role is created in Salesforce.com.

Business Rules

Only the members of the Customer Data Management team can create Individuals or Organisations with a Role Type of **Customer**.

You would only create an Organisation with a role type of Prospect if you have already verified interest in products and services that lead to an Opportunity.

Relationships

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

The following steps outline how to add or edit a Relationship.

1. Locate the relevant Individual or Organisation and view its details.
2. Click New or click the Relationship to be edited.

The **Relationships** screen displays.

3. Complete relevant fields listed in the table below.

Party Role fields to be completed are described in the table below. Mandatory fields are **bolded**; instructions for completing each field are presented in bullet points.

Field	Definition
Relationships Edit	
Relationships	Name of the related entity. • Click in the first **Relationship** field and type the relevant Individual or Organisation. Alternatively: • Click and use lookup to locate the required Individual or Organisation.
Role	• Click the drop-down menu and select the relevant option.

4. Repeat for any additional relationships to the Party.
5. Click Save

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

The new Relationship is created in Salesforce.com.

Billing Accounts

Billing Accounts 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.

Attachments

When there is a need for external documents such as word docs, PDFs etc. to be stored in Salesforce.com and linked to an Organisation, Individual or other Salesforce.com record, Attachments can be used.

The only exception is Opportunities, where the Collateral feature is used instead.

The following steps outline how to add an Attachment.

1. Locate the relevant Individual or Organisation and view its details.
2. Click Attach File

The **Attach File** screen displays.

3. Click Browse... and use the Windows functionality to locate and select the file you want to attach.
4. Click Attach File

Repeat steps 3-5 to attach additional files.

5. Click Done

The new attachment displays in the Notes & Attachments section on the Individual or Organisation screen.

Notes

Notes can be used to store information that can't be accommodated anywhere else in Salesforce.com

The following steps outline how to add a Note.

1. Locate the relevant Individual or Organisation and view its details.
2. Click New Note

The **Note Edit** screen displays.

3. Complete relevant fields listed in the table below.

Note fields to be completed are described in the table below. Mandatory fields are **bolded**; instructions for completing each field are presented in bullet points.

Field	Definition
Note Information	
Title	Title of the Note. • Click in the **Title** field and type the Note title.
Body	Note content. • Click in the **Body** text area and type the note.

4. When you have composed the note, click Check Spelling

If you have made any errors, you will be prompted to correct these in a separate window; click Finish Checking when spell checking is completed.

5. Click Save

- To cancel out of the process without saving, click Cancel

The new note displays in the Notes & Attachments section on the Individual or Opportunity screen.