Introduction to Salesforce.com QRG

SALES ACADEMY

What is Salesforce.com.com?

This QRG is designed to help you understand the User Interface of Salesforce.com and some of its terminology and basic functionality.

Salesforce.com is designed to assist the business in the management of client relationships and ultimately increase sales effectiveness and profitability.

It is a best in class, technology based solution that facilitates the sales process and provides a single source of customer information.

Prerequisites

You require access to Salesforce.com.

Accessing Salesforce.com

You will receive an email containing your Salesforce.com User Name and Password.

The following steps outline how to access Salesforce.com.

1. Click in the **User Name** field and type your Salesforce.com user id.
2. Click in the **Password** field and type your Salesforce.com password.

If you want Salesforce.com to remember your user name, click the **Remember User Name** checkbox.

3. Click Login

On first time log in, you will be prompted to change the system generated password to one of your own choosing. Once you have changed your password, Salesforce.com then opens at the Home tab.

You should log out of Salesforce.com when you are finished working for the day.

The following steps outline how to log out of Salesforce.com.

1. Click the drop-down menu next to your name (at the top right-hand corner of the Salesforce.com window) and select Log Out.

You are logged out of Salesforce.com.

Password Tips

The following default standards apply to passwords in Salesforce.com:

- Passwords must be a minimum of 8 characters; mixed alpha and numeric
- Passwords are case sensitive
- Passwords will expire in 90 days
- 10 incorrect login attempts result in your access being locked for 15 minutes
- Passwords cannot be reused more than once every 3 changes

Salesforce.com also logs you out after 2 hours of inactivity; this means you will need to log back in to continue working.

Remember to save when editing

If you are logged out of Salesforce.com any unsaved data is lost. Ensure you save often when using Salesforce.com to avoid data loss.

Using your Home Page

The **Home** page is designed as a one stop shop for accessing all Salesforce.com tasks that are assigned to or are to be actioned by you. It acts as a prompt across key sales functions and also links to key screens within the system.

Salesforce.com Page Components

The following components are available on all Salesforce.com windows:

Navigation Tabs

Navigation Tabs display across the top of any Salesforce.com window; click these to display specific information; for example, click Customers to view details about Australia Post customers. See the **Using Navigation Tabs** section of this QRG for more information.

Sidebar

The Sidebar displays your 10 most recently accessed items, messages and alerts. You can reclaim on-screen real estate by collapsing the sidebar; click

Content Area

The Content Area is the section of any Salesforce.com window where information displays.

Home Page Components

Your Home Page is comprised of a range of sections that provide a quick and easy way of viewing key information at a glance.

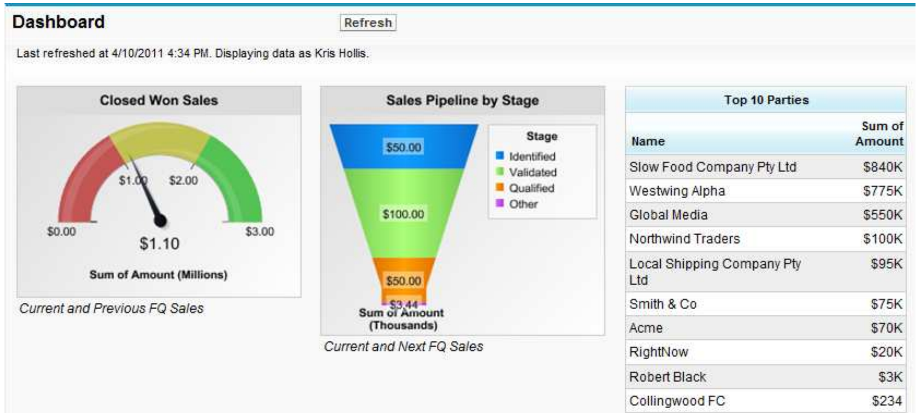
Scrolling down, your Home Page contains the following components:

Dashboard

Your Dashboard shows data from source reports as visual components, providing a snapshot of key metrics and performance indicators.

Customise your Dashboard by clicking the **Customize Page** link.

The **Sales Dashboard** is shown in the figure below.



Hover over Dashboard elements to view more information; click on specific elements to open a report based on the selected element.

Tasks

The Tasks section displays Activities related to Customers, Opportunities etc. that you need to complete.

Calendar

The Calendar displays Events related to you scheduled over the next 7 days.

Perform a Quick Search

There is a search field at the top of the Salesforce.com window, regardless of what you are looking at.

The following steps outline how to search Salesforce.com.

1. Click in the Search field and type search criteria.
2. Click Search

Salesforce.com elements matching your search criteria display.

Searching Tips

The following are tips for searching in Salesforce.com:

- Searches are not case sensitive
- Use wildcards to return greater search results; the wild character is *
- Narrow the search by type by clicking **Search Options**; for example Customers, Contracts, Campaigns etc.

Accessing Help and Training

A full suite of context and page sensitive on-line help and training is available in Salesforce.com.

Click the **Help & Training** link at the top-right hand corner of any Salesforce.com window and follow the links to view help and training relating to the page you are viewing.

Using Navigation Tabs

Navigation tabs in Salesforce.com display across the top of the Salesforce.com window; the Home page is a Navigation Tab.

Most Navigation Tabs allow you to quickly create and locate records, sort and filter using standard and custom list views and create and edit records.

The table below describes the content behind each Navigation Tab at high level and where you can find more information on its content.

Depending on your role, you will have some or all of the following tabs available to you.

Tab	Definition
Home	This is your Salesforce.com Home Page. Information on this tab is included in this QRG.
Leads	Leads are prospective customers who do not currently have any business with Australia Post.
Individuals and 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. **Individuals** can be Business Contacts or Consumers.
Opportunities	Opportunities are the sales that you want to track. By adding opportunities, you are also building your pipeline. You can also link opportunities to campaigns to help measure the ROI of your marketing programs.
Reports	This tab contains reports that can be run on data stored in Salesforce.com.
Dashboards	A dashboard shows reports and data as visual components. These can be charts, gauges, tables or metrics.
Documents	A document library is a place to store files without attaching them to Customers, Contacts, Opportunities or other records. Each document in the document library resides in a folder; folder attributes determine the accessibility of the folder and the documents within it.
Products	Products are the individual items that you sell on your Opportunities. You can create a Product and associate it with a price in a price book. Each product can exist in different price books with different prices.

Tab	Definition
Billing Accounts	This tab is visible to the CMD team only; it provides access Customer Billing Account information.

Mandatory fields

There are two types of mandatory fields in Salesforce.com. It is extremely important you input correct data into Salesforce.com to ensure that all reporting is accurate and current.

System mandatory fields

You *must* input data into a system mandatory field in order to be able to continue. System mandatory fields are indicated by a red line at the left of the field.

Business desired fields

Business mandatory fields are those where business rules require data to be input into a particular field, but Salesforce.com doesn't actually prevent you from leaving it blank.

Business rules and reporting needs drive the need to complete these fields.

Data integrity

It is important to ensure that all inputs into Salesforce.com are correctly and accurately entered, providing meaningful and business-worthy information.

Additionally, it is important to ensure that data entry is done at the right time to support the new business process.

Failure to input meaningful, timely and accurate information into Salesforce.com will result in erroneous reporting to sales management, potentially impacting financials and decision making.

Moral of the story – junk in equals junk out.

Data Integrity is YOUR responsibility

Any data you create, modify or delete will most likely have a flow-on effect in Salesforce.com. Ensure you know the impacts of your data BEFORE you make changes.