Work with Activities QRG

SALES ACADEMY

Activities Overview

This QRG is designed to help you use activities in Salesforce.com.

When do I perform this?

You need to create or edit Activities whenever you are documenting activity you have performed that relates to an Individual, Organisation, Opportunity or other record in Salesforce.com

What has to happen before I perform this?

You have just had a meeting or phone call with a business contact or are planning activities for either yourself or others that need to be recorded in Salesforce.com.

Prerequisites

You need access to Salesforce.com.

Locating Activities

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

Home Page: scroll to the **My Tasks** section to view Activities by Date, Subject and what they are related to.

Reminder Window: The Reminder Window pops up when you access Salesforce.com to notify you of Activities due for completion today.

Generally, you will view and complete Activities from within an Opportunity, Individual or Organisation; scroll to the **Open Activities** section to view Activities to be completed.

Working with Activities

Effective use of Activities can be a huge productivity driver; used properly, Activities help to prioritise and manage workload and improve the customer experience - how many times has someone forgotten to follow up with you because 'they were so busy'?

Create an Activity

The following steps outline how to create an Activity.

1. Locate and open the relevant Salesforce.com area; for example an Opportunity, Organisation, Individual etc.
2. Click New Task

The **Task Edit** screen displays.

Activity 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
Task Information	
Assigned To	The assigned owner of task; by default, the Activity is assigned to its creator (the creator's name displays). If you want someone else to complete a task; for example, a sales manager may wish to assign tasks to a sales person after a pipeline review specific to Opportunities they're working on, edit this field to display the relevant person.
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 Task displays in the second field. Click to use the lookup to edit this field.
Subject	Subject or short description of the Activity. 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 **Name** drop-down menu and select the relevant option. • Click in the **Name** field and type the relevant name. Alternatively: • Click and use Lookup to find the required person.
Due Date	Date the Activity should be completed by. • Click in the field and use the calendar to select the due date.
Comments	Description of the Activity and / or its outcome. • Click in the field and type any relevant comments supporting the Activity.
Additional Information	
Status	Progress towards the Activities completion. • Click the drop-down menu and select the appropriate status.
Phone	The Phone number of the Salesforce.com object the Activity relates to. This is a read only field.
Priority	• Click the drop-down menu and select the appropriate option.
Email	The Email address of the Salesforce.com object the Activity relates to. This is a read only field.

Navigation Tab	Definition
Send Notification Email	We don't all spend our days in the Salesforce.com environment; checking this option sends an email to the assigned with a link that takes them straight to the assigned activity in Salesforce.com. • Click the checkbox.
Recurrence	
Create Recurring Series of Tasks	• Click the checkbox.
Reminder	
Reminder	• Click the checkbox. • Click in the date field and use the calendar to select the Campaign start date. • Click the time drop-down menu and select a time for the Reminder.

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

- To cancel without saving 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

Edit Activities

Activities need to be maintained in order to be effective; if you have completed a task it should be closed out. After a meeting, details of what took place should be added along with any follow up activities to keep things moving to where you need them to.

The following steps outline how to edit an Activity.

1. Locate and open the Activity you need to edit.
2. Click Edit

3. Make any required edits to the Activity. Use the field table in the **Create an Activity** section of this QRG for details on validating and updating Activity fields.
4. When you have completed editing the Activity, click Save

Follow the steps in the Create an Activity section to finalise editing or create new Tasks or Events.

Activities and the Sales Process

Each step in the Sales Process will need Activities to be planned and concluded in order to progress to the next stage. By logging and maintaining Activities against Opportunities and Individuals that you deal with Salesforce.com, you can create a comprehensive picture of your Prospects' and Customers' Australia Post experience.

Sales Coach

Sales Coach is available in all Opportunities as a guide for you through the sales process that includes:

- A **Stage Description** that includes Activities you need to complete to move the Opportunity to the next stage in the sales process
- Information on when the current Opportunity stage is complete
- Information on how to verify is the Opportunity stage is complete and it is ready to move to the next stage in the sales process.

You may find it useful to create Activities against the Opportunity that reflect those described in the Sales Coach for the current Opportunity stage.

The following steps outline how to access Sales Coach.

1. Locate and open the relevant Opportunity.
2. Click Sales Coach

Sales Coach displays for the current Opportunity stage.

- Click the **Stage Name** drop-down menu to change to Sales Coach for other Opportunity stages.
- To close Sales Coach, click **Close**.

Other Activity Types

Two other types of Activities are available in Salesforce.com; these are **Log a Call** and **Send an Email**.

Log a Call

Log a Call is used to record a completed phone call. This is ideally done as close to conclusion of the call as possible when details and any follow-up Activities are still fresh in your mind.

The following steps outline how to create a Log a Call Activity with a Follow-Up Task.

1. Locate and open the relevant Salesforce.com area; for example an Opportunity, Organisation, Individual etc.
2. Scroll to the **Activity History** section and click Log A Call

The **Log a Call** screen displays.

3. Complete or validate all fields in the **Task Information** section as described in the **Create an Activity** section of this QRG.
4. Complete or validate all fields in the **Additional Information** section as described in the **Create an Activity** section of this QRG.

Note: The **Status** field is set to **Completed** and is read only; this is because the call Activity you are entering has already taken place.

You are now required to enter details relating to the follow-up Task based on the call you are logging.

5. Complete or validate all fields in the **Task Information** section as described in the **Create an Activity** section of this QRG.
6. Complete or validate all fields in the **Additional Information** section as described in the **Create an Activity** section of this QRG.
7. Complete or validate all fields in the **Reminder** section as described in the **Create an Activity** section of this QRG.
8. When you have completed creating the Activity, click Save

Follow the steps in the Create an Activity section to finalise editing or create new Tasks or Events.

Both Activities are created and now display in Salesforce.com.

Send an Email

The following steps outline how to create a Send an Email Activity.

1. Locate and open the relevant Salesforce.com area; for example an Opportunity, Organisation, Individual etc.
2. Scroll to the **Activity History** section and click Send An Email

The **Send an Email** screen displays.

Activity 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
Edit Email	
Email Format	The format you compose the email in; by default this is set to **Text Only**. • Click **Switch to HTML** to compose the email in HTML format.
To	The addressee of the email. • Click in the field and type the relevant addressee. Alternatively: • Click and use Lookup to find the required addressee.
Related To	Record that the Activity is associated with; for example, an Opportunity. By default, the Salesforce.com object that was open when you clicked Send An Email displays.
Additional To, CC and BCC	Additional recipients of the email. • Click next to either the **Additional To**, **CC** or **BCC** fields. • Click the **Show** drop-down menu and select the relevant option. • Select an addressee from the **Contacts** list then click >> next to either **Additional Recipients**, **CC Recipients** or **BCC Recipients**. The selected addressee displays in the requisite section. • Repeat these steps for all additional addressees. • When all addressees are entered, click Save To remove recipients click << To cancel out without saving and changes, click Cancel
Subject	Title of the Email. • Click in the field and type a relevant email title.
Body	Content of the Email. • Click in the section and type your message.

9. Click Check Spelling to ensure there are no errors in your email.
10. Click Send

- To attach a file to the email, click Attach File
- To cancel out without saving and changes, click Cancel

The email is sent and an Activity is created in Salesforce.com.