# Create New Individuals QRG

## Individuals Overview

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

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

## When do I perform this?

You should add a new Individual when you become aware of a need to document a professional relationship with another Individual in the Australia Post CRM.

## 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.

## Individuals

An Individual is a person that Australia Post has a professional relationship with, either as a business contact or a consumer.

## Locating Individuals

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

- 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 Individual and click the **Name** link.

The Individual's details display.

## Individual Information

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

### Individual Detail

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

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

### Open Activities

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

- Click the **Subject** of any Activity to view more information.
- Click New Task to create new task for the Individual.
- Click New Event to create a new event for the Individual.
- Click New Meeting Request to create a new meeting request and send it to the Individual.

See the Activities QRG and the Events 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.

### Opportunities

Lists all Opportunities currently open for the Individual.

- Click any **Opportunity Name** to view more information.

- Click New Opportunity to create a new Opportunity for the Individual.

See the New Opportunities 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.

### 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.

### Notes and Attachments

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

- 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.

### Activity History

The Activity History displays all completed tasks for the Individual.

- 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 Individual as an Activity.

See the Activities QRG for more information.

### Campaign Members

A campaign member is a Lead or Individual that has been targeted for a specific Marketing campaign.

#### Hover over the Hovers

The Hovers at the top of the Party 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 Individual

The following steps outline how to create a new Individual.

1. Click the **Individuals and Organisations** Navigation Tab.
2. Search for the new Individual 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 if the record is an Individual or Organisation.<br>• Click in the **Record Type of new record** drop-down menu and select **Individual**. |

5. Click Continue

- To cancel without saving, click Cancel

The **Individual Edit** screen displays.

6. Complete all mandatory and other relevant fields.

Individual Edit 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 |
|---|---|
| **Information** | |
| First Name | First name of the Individual.<br>• Click the drop-down menu and select a relevant prefix.<br>• Click in the field and type the Individual's first name. |
| Phone | Individual's phone number.<br>• Click in the field and type the Individual's phone number. |
| **Last Name** | Last name of the Individual.<br>• Click in the field and type the Individual's last name. |
| Mobile | Individual's mobile phone number.<br>• Click in the field and type the Individual's mobile phone number. |
| Middle Name | Middle name of the Individual.<br>• Click in the field and type the Individual's middle name. |
| Email | Individual's email address.<br>• Click in the field and type the Individual's email address. |
| Job Title | Individual's job title.<br>• Click in the field and type the Individual's job title. |
| Status | • Click the drop-down menu and select a relevant option. |
| Title Group | • Click the drop-down menu and select a relevant option. |
| Title Code | The Title Code is linked to the Title Group selected and is pre-populated. |
| **Address Information** | |
| Billing Street, City, State, Post Code, Country, DPID | Individual's postal details used for billing related correspondence.<br>• Click in the **Billing Street** field and type the Individual's billing address street name and number.<br>• Click in the **Billing City** field and type the Individual's billing address city.<br>• Click in the **Billing State** field and type the Individual's billing address state.<br>• Click in the **Billing Postal Code** field and type the Individual's billing address post code.<br>• Click in the **Billing Country** field and type the Individual's billing address country.<br>• Click in the **Billing DPID** field and type the |

| Field | Definition |
|---|---|
| | relevant information.<br>• Click OK |
| Physical Street, City, State, Post Code, Country, DPID | Individual's postal details used for general correspondence.<br>Complete the same steps as described for the Billing Address information.<br>If the Physical Address details are the same as the Billing Address details, click **Copy Billing Address to Physical Address**. |
| **Marketing Options** | |
| Do Not Mail | • Click the check-box. |
| Do Not Call | Indicates if the Individual does not want to be contacted via phone<br>• Click the check box. |
| Email Opt Out | Indicates the Individual does not want to be included in mass emails.<br>• Click the check box. |
| **Additional Information** | |
| Birthdate | Individual's date of birth<br>• Click in the field and use the calendar to select the Individual's birthdate. |
| Lead Source | If the Individual is a Lead, denotes the source of the Lead.<br>• Click the drop-down menu and select a relevant option. |
| Gender | Individual's gender.<br>• Click the drop-down menu and select a relevant option. |

| Field | Definition |
|---|---|
| Description | Description of Individual.<br>• Click in the field and type any business related information about the Individual. |
| **Consumer Information** | |
| Sector | • Click the drop-down menu and select a relevant option. |
| ABN | The Individual's Australian Business Number.<br>• Click in the field and type the Individual's ABN. |
| Number | • Click in the field and type the Individual's number. |

7. Click Save

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

The new Individual is created in Salesforce.com.