Kursprogram Introduktion till tjänstebaserade affärssystem (SAFFK-INTRO)

Labb 3

Hösten 2018

7,5 hp

Goal

- To be familiarized with Salesforce,
- To be able to create customers (accounts), contacts, leads, opportunities, cases and etc.
- To be able to integrate third party apps in Salesforce
- To be able to manage cases, create events, tasks, meetings etc.
- To be able to integrate Salesforce with Facebook to create leads, cases, accounts and opportunities from Facebook fans.

Learning outcomes

After taking this laboratory exercise you will learn the basics of Salsesforce.com and Force.com platforms. You will learn how to work with Salesforce.com platform to: collaborate with coworkers, create tasks and events, identify Salesforce edition, learn basic terminologies, understand browser issues, share ideas (post idea, file, link, & polls), create and manage contacts, create and manage leads and opportunities. After completing this lab you will be able to identifying Salesforce.com and Force.com cloud computing service models. You will also be able: to customize Salesforce, learn how users are managed, and to be able to create chat with colleagues

Understanding Force.com and integrating, installing apps particularly Facebook. In addition to this you will be able to customize Salesforce. In order to work with creation of new

Salesforce pages you will learn how to enable developer mode. As part of integrating third party apps you will learn how to manage your marketing ads using Salesforce on Facebook. Also you will be able to create cases, leads, and opportunities from your Facebook information.

Remarks

- The notebook picture shows that the section or the line is a note, remark or an explanation of terms
- Replace "*groupnumber*" with your actual group number

1. Basics

1. Introduction / objective

Salesforce.com is a cloud computing software-as-a-service provider. Salesforce is number one Customer relationship management system (CRM). Salesforce is a Cloud solution which is offered as Software-as-a-Service.

2. Salesforce editions

- **Professional** – is great for smaller contact centers – case management and tracking, service cloud console, asset tracking, chatter, auto-assignment and escalation rules, web and email-case capture… etc.
- **Enterprise** – for larger companies – all features of professional edition as well as offline access, force.com pages and Visualforce for custom development, integration via web services API, record types, and social media integration, workflow …
- **Unlimited** – gives access with everything and 24/7 support
- **Developer** – a free salesforce instance with limited licenses with full functionality for developers and admins

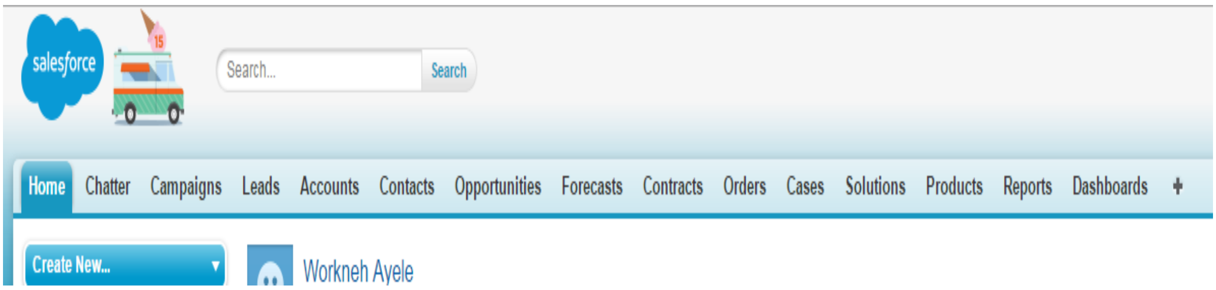
<u>For more information about editions use the following link:</u>

- https://help.salesforce.com/apex/HTViewHelpDoc?id=overview_edition.htm&language=en_US
- https://help.salesforce.com/apex/HTViewHelpDoc?id=limits_general.htm&language=en_US

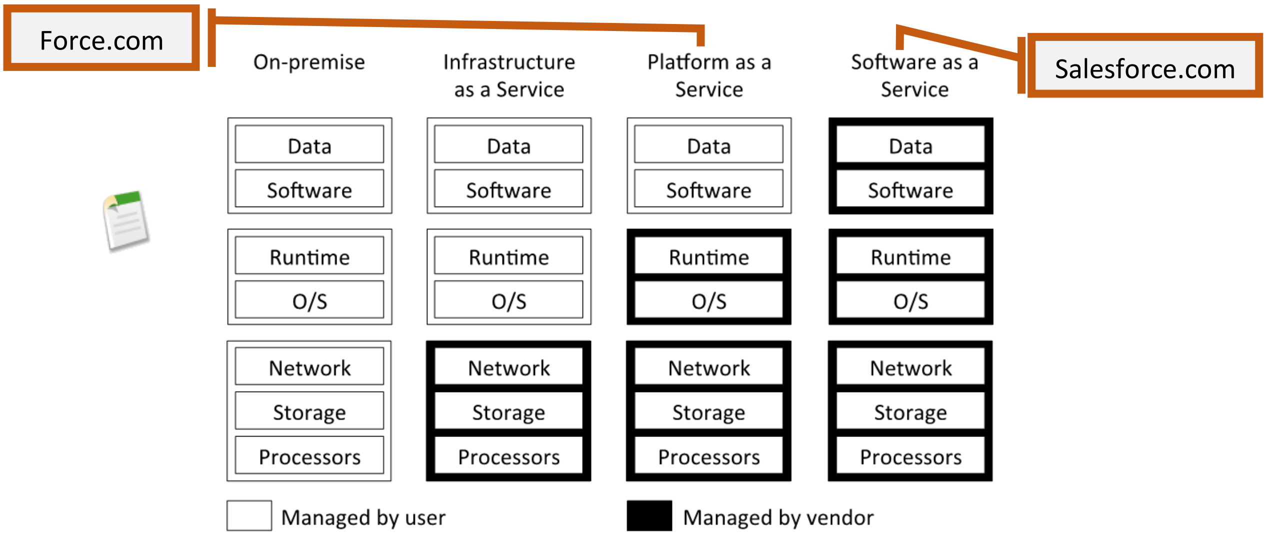
3. Familiarize yourself with basic terms

<u>Salesforce keywords</u>

The following snapshot illustrates tabs of **Salesforce**.



- **Home Tab** – Starting page from which users can choose sidebar shortcuts and options, view current tasks and activities, or select another tab.
- **Chatter Answers** –is a self-service support community where users can post questions and receive answers and comments from other users or your support agents.
- **Campaign** – A marketing initiative, such as an advertisement, direct mail, or conference that you conduct in order to generate prospects and build brand awareness.
- **Lead** – A *lead* is a sales prospect who has expressed interest in your product or company.
- **Account** – An *account* is an organization, company, or consumer that you want to track—for example, a customer, partner, or competitor.
- **Contract** – A *contract* is an agreement defining the terms of business between parties.
- **Opportunities** – Opportunities track your sales and pending deals.
    - **Opportunity Team** – An opportunity team is a set of users that normally work together on sales opportunities. A typical opportunity team might include the account manager, the sales representative, and a pre-sales consultant. You can specify the opportunity team for each opportunity that you own.
- **Forecasts** – Projections of sales based on the organization's fiscal year.
- **Contact** –are the individuals associated with your accounts.
- **Case** – Detailed description of a customer's feedback, problem, or question. Used to track and solve your customers' issues.
- **Products** –are your company's products and services, associated with the prices for which you offer them. You can link products and their prices to your opportunities.
- **Report** – A *report* returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. See Tabular Report, Summary Report, and Matrix Report.
- **Solution** – A solution is a detailed description of a customer issue and the resolution of that issue. Solution managers, administrators, and users with the appropriate permissions can create, review, and categorize solutions. They can also publish solutions to the Self-Service portal and make solutions public.
    - The Solutions tab displays a home page that lets you quickly locate and manage solutions. If your organization uses solution categories, you can browse for and find solutions by category. You can also sort and filter solutions using standard and custom list views.
- **Dashboard** – A *dashboard* shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components.
- **Cloud computing** – *"Cloud computing is a model for enabling ubiquitous, convenient, on-demand network access to a shared pool of configurable computing resources (e.g., networks, servers, storage, applications, and services) that can be rapidly provisioned and released with minimal management effort or service provider interaction. This cloud model is composed of five essential characteristics, three service models, and four deployment models."* (Mell & Grance, 2011 p. 2)
    - The three service models are – Infrastructure as a Service (**IaaS**), Platform as a Service (**PaaS**), and Software as a Service (**SaaS**) refer to the following figure from (Harms & Yamartino, 2010)



- The four deployment models
    - **Private cloud** – cloud infrastructure operated and owned by an organization.
    - **Community cloud** – cloud infrastructure designed for specific community of consumers that have shared concerns.
    - **Public cloud** – cloud infrastructure for open use by the general public owned by government, company or organization**.**
    - **Hybrid cloud** –is a composition of two or more distinct cloud infrastructures.
- Essential characteristics are – on-demand self-service, broad network access, resource pooling, rapid elasticity, and measured service.

- **Service-oriented architecture** (**SOA**) is an architectural pattern in computer software design in which application components provide services to other components via a communications protocol, typically over a network. The principles of service-orientation are independent of any vendor, product or technology (Wikipedia).
- **SOA** – Service-Oriented Architecture (SOA) is an architectural style that supports service-orientation.
    - Service-orientation is a way of thinking in terms of services and service-based development and the outcomes of services.
        - Service - A service – Is a logical representation of a repeatable business activity that has a specified outcome (e.g., check customer credit, provide weather data, consolidate drilling reports)
- **Force.com** –is a platform as a service (PaaS) that allows developers to create multitenant add-on applications that integrate into the main Salesforce.com application. Force.com applications are hosted on Salesforce.com's infrastructure.
    - **Apex** – Force.com applications are built using Apex (a proprietary Java-like programming language for Force.com)

    - **Visualforce** – (an XMLsyntax typically used to generate HTML). The Force.com platform receives three complete releases a year. (Salesfoce.com, Wikipedia).
- **Salesforce1** – is a platform that brings together Salesforce.com, Force.com, Heroku, and ExactTarget into one family of cloud services.
- **Salesforce.com** – salesforce.com is the primary enterprise offering within the Salesforce1 Platform, and provides companies with an interface for case management and task management, and a system for automatically routing and escalating important events. The Salesforce customer portal provides customers the ability to track their own cases, includes a social networking plug-in that enables the user to join the conversation about their company on social networking websites, provides analytical tools and other services including email alert, chat, Google search, and access to customers' entitlement and contracts.
- **Chatter** – the Sales Cloud includes a real-time sales collaborative tool called Chatter.

4. Browser issues

Which environment is suitable for Salesforce.com?

- **Mobile, tablets**
    - Accessing the full site with any mobile browser isn't supported, therefore it is preferable to use salesforce app when using mobile devices
- **Internet explorer versions 9, 10, and 11 – use latest internet explorer and apply updates**
    - Mail Merge - feature requires Internet Explorer for Windows 6.0 or higher on Microsoft Windows 2000 or Windows XP. Mail merge is not supported on chrome and Firefox

    But

    - Full salesforce site is not supported in touch-enabled devices for windows – use mobile app in this case
    - Salesforce1 setup page and Salesforce1 wizard requite version 9 or later
    - HTML solution editor in version 11 is not supported
    - Compatibility view of all versions, Metro version of version 9 feature in internet explorer is not supported
    - Version 11 is not supported for developer console, salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher
- **Mozilla Firefox**
    - Salesforce makes every effort to test and support the most recent version of Firefox
    - Refer to salesforce help and support for more configuration issues related with it
- **Google Chrome – chrome applies updates automatically**
    - Salesforce makes every effort to test and support the most recent version
    - Chrome is not supported for
        - The Add Google Doc to Salesforce browser button
        - The Console tab (The Salesforce console is supported).
- **Safari version 5.x, 6.x and 7.x on Mac OS X**
    - Safari on iOS is not supported for full Salesforce site
    - Salesforce CRM Call Center, Salesforce console, Salesforce Analytics Cloud are not supported

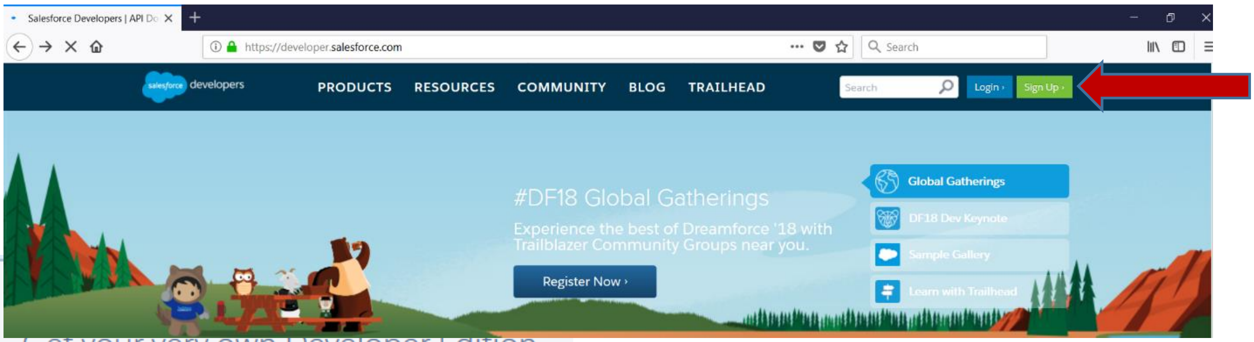
5.Creating a developer account

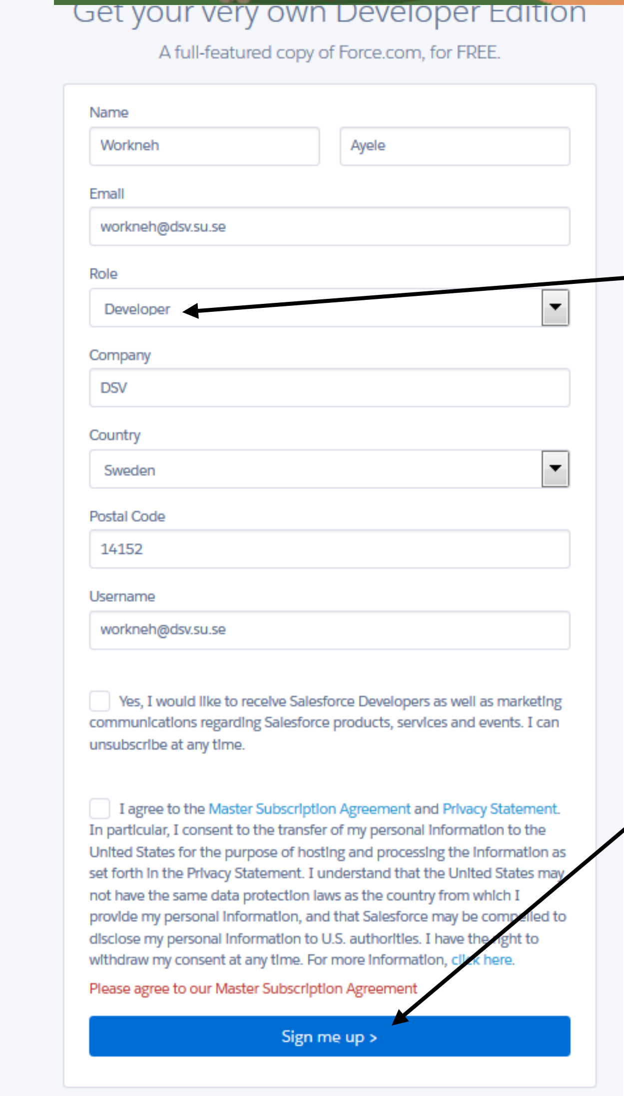
<u>Open a browser</u>

- Open a browser preferably **Firefox**

Enter – developer.salesforce.com in the address bar

- Select **Signup**

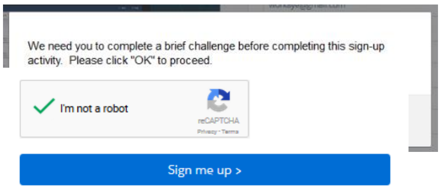




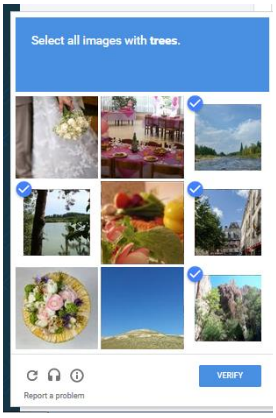
- Enter your information
- Name – [your first and last names]
- Email – [your email]
- Role – should be developer
- Company – FirstName-DSV
- Country – Sweden
- Postal Code – [your postal code]
- Username – [your email]
- Check *I agree to …*
- Then click **Sign me up**

You might be prompted to login to your email account and confirm by clicking the link force.com sends to you, otherwise do whatever is necessary to create the account.

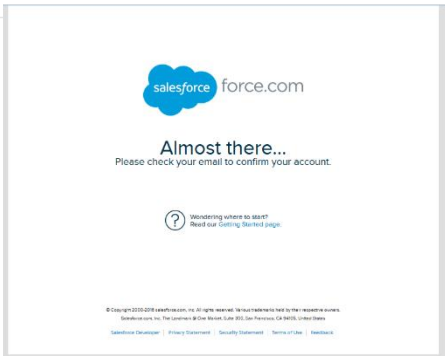
- Click **OK** (you may not see this message)



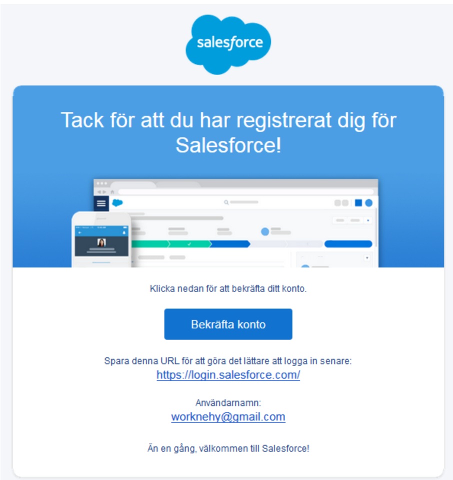
- Check on **I'm not a robot** check box (you may not see this message, so you may skip this step if you are not prompted to verify that you are not a robot)



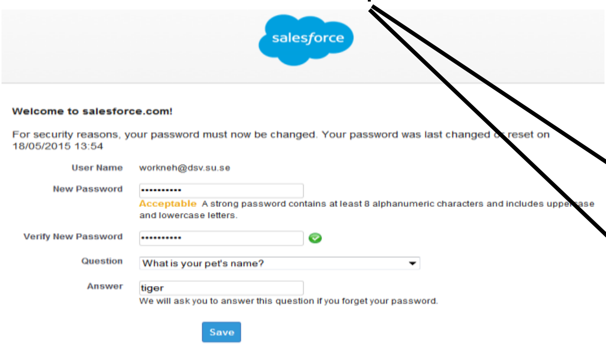
- Then if you are prompted for a verification – provide verification information as illustrated in the figure on the left side of this page
- Then click **Sign me up**
- Check your email if your account is already registered you will see the following information in your email

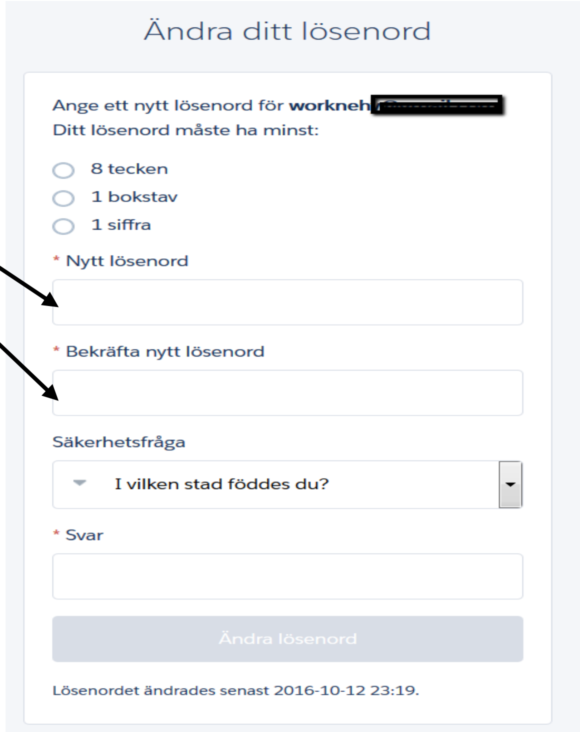


- If your email is not used before you will see the Almost there… message on your browser and you will also receive an email similar to illustration below



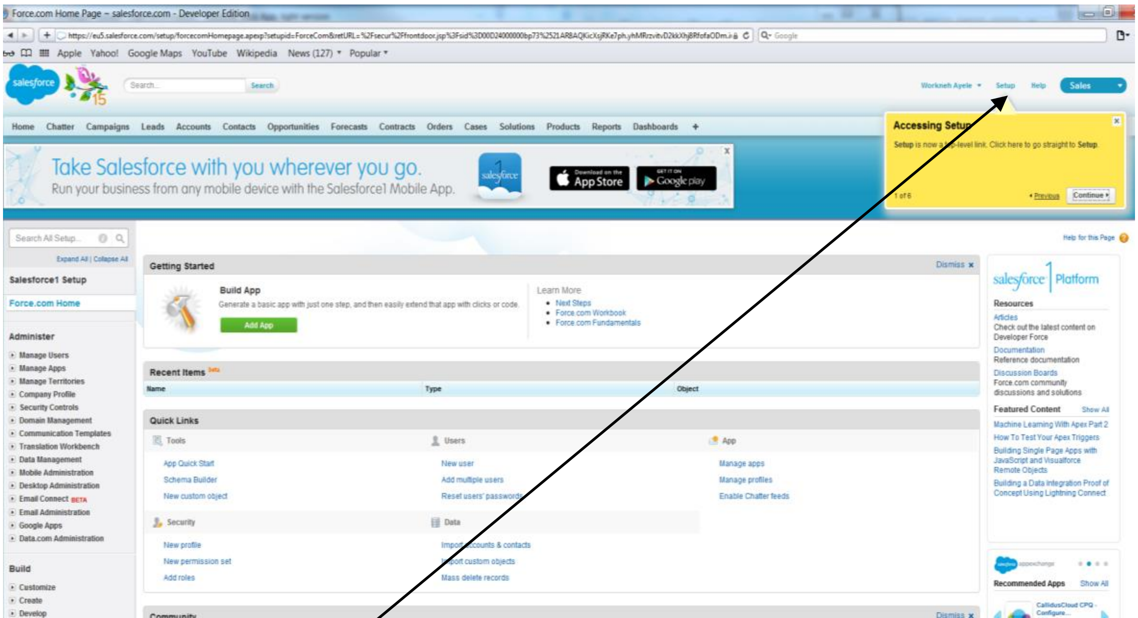
- Click on the Bekräfta konto / confirm your account
- Specify 8 characters password with at least one letter and at least one number





- Under secret question or Säkerhetsfråga select your security question then enter your answer under Answer/Svar
- Click **Ändra Lösenord / Save**
- Then the default setup screen will appear as shown below

Exercise: Figure out how you can switch to classical view (Salesforce Classic or Byt til Salesforce Classic) mode otherwise you will not be able to do this exercise.

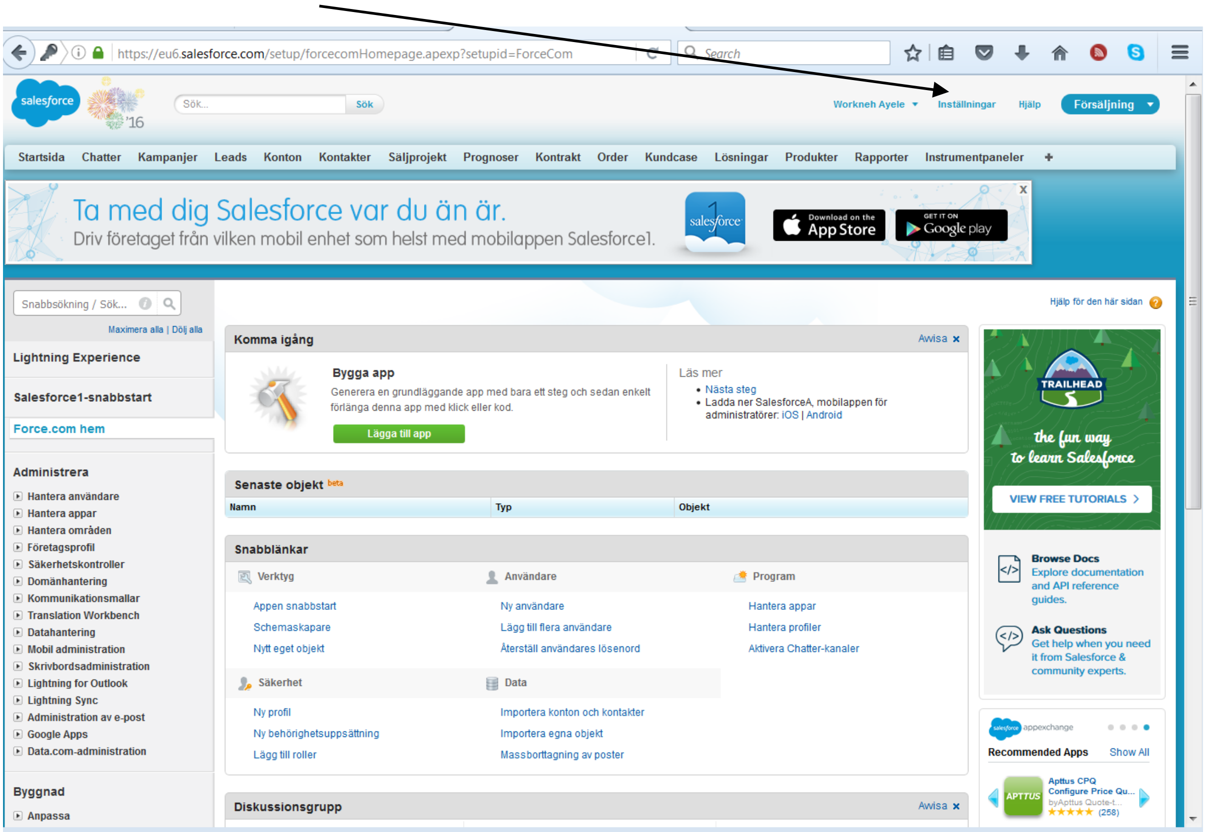


S

Home – home contains standard components such as recent items and alerts &messages, and any custom components you create.

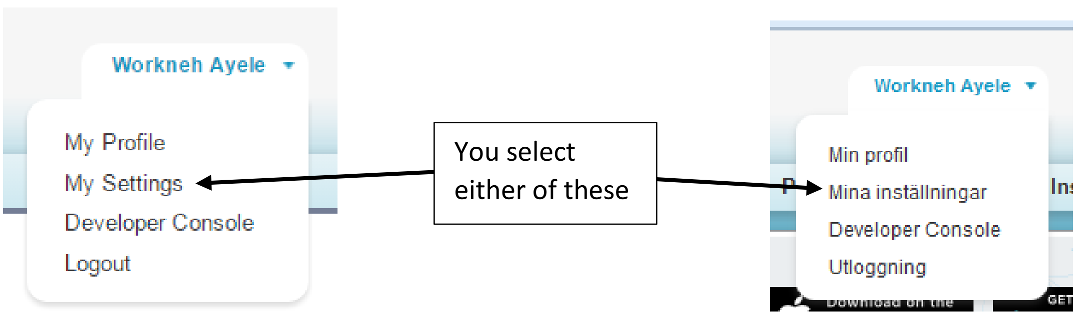
- Select **Setup** in Salesforce.com or

- Select **Inställningar** if you are in Salesforce.com Swedish version

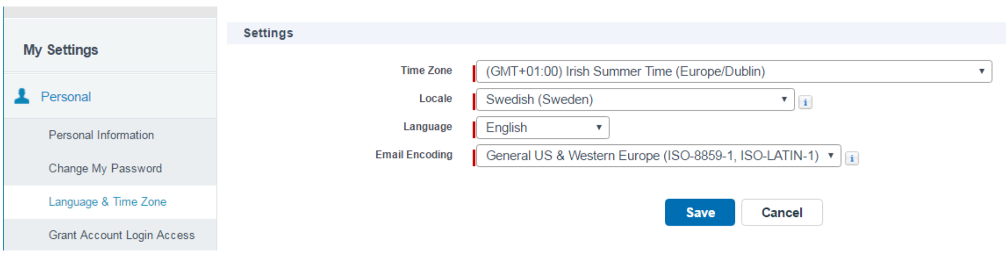


Changing language and timezone / språk och tidzon

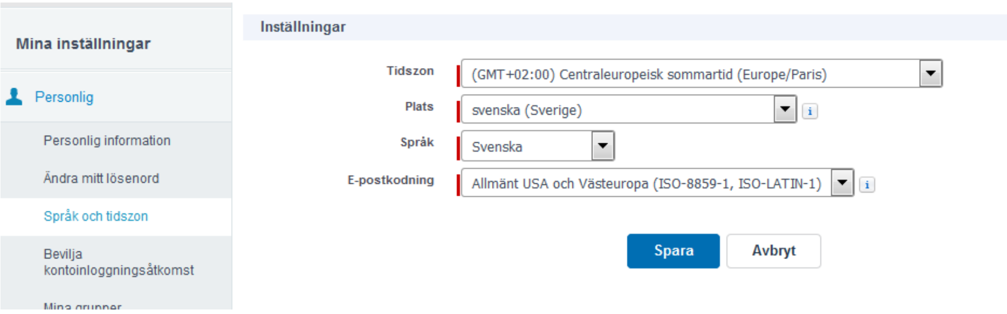
- Select Your name then select **Min Inställningar** / Select your name then select **My Setting**



- Select **Language & Time Zone** under **Person**



- Select **Språk och tidszon** under **Personlig**

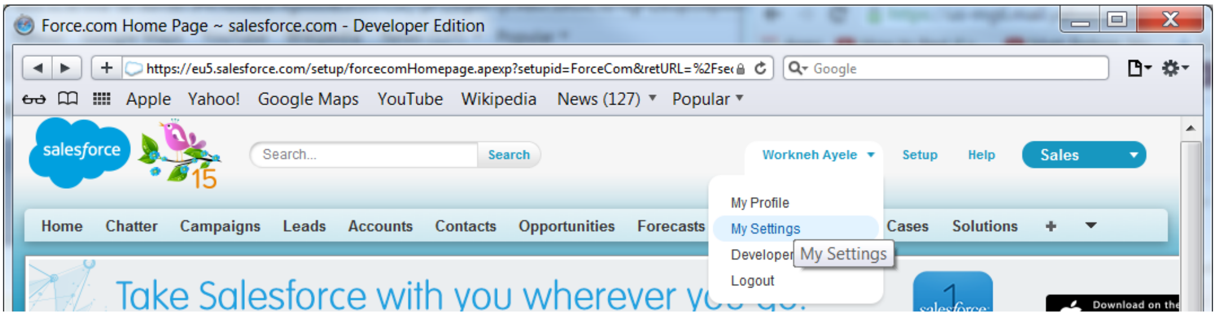


- Now change your **language or språk** to English and Time Zone or tidszone to GMT+2
- Select **Spara** or **Save**

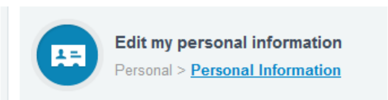
Enabling developer mode

To creating salesforce page, that is to use the Force.com, we need to enable developer mode

- You need to enable development mode on your user record to use the inline page editor
- Select the arrow next to your name
- Select **My Settings**



You can select > Personal information – to change your information such as name, address, etc.

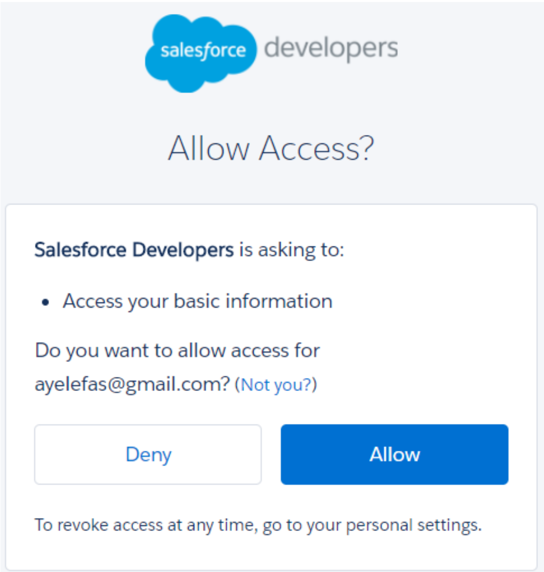


- Then **select Advanced User Details** under **My Settings** bar on the left side
- Select **Edit**
- Now you can check **Developer Mode** then click **Save**

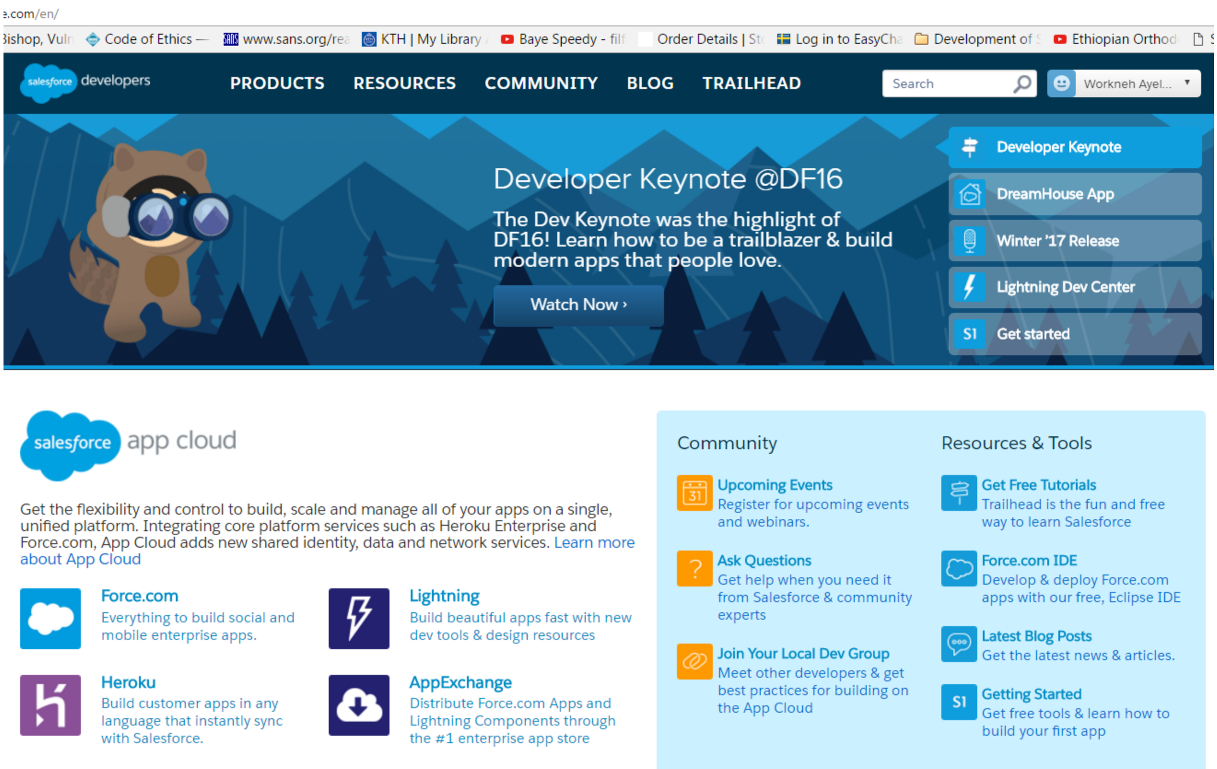
- Select **Save**
- Logout from your salesforce session.

Login to developer.salesforce.com

- Logging to developer
- Enter **developer.salesforce.com**
- Select **Login**
- Enter user name and password
- Then **Log in to Salesforce**
- Select **Allow**

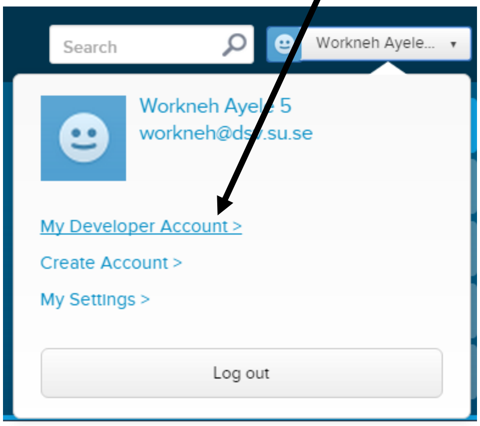


Your developer account will enable you to access resources, forums, community as you can see in the Snapshot of the developer page below.

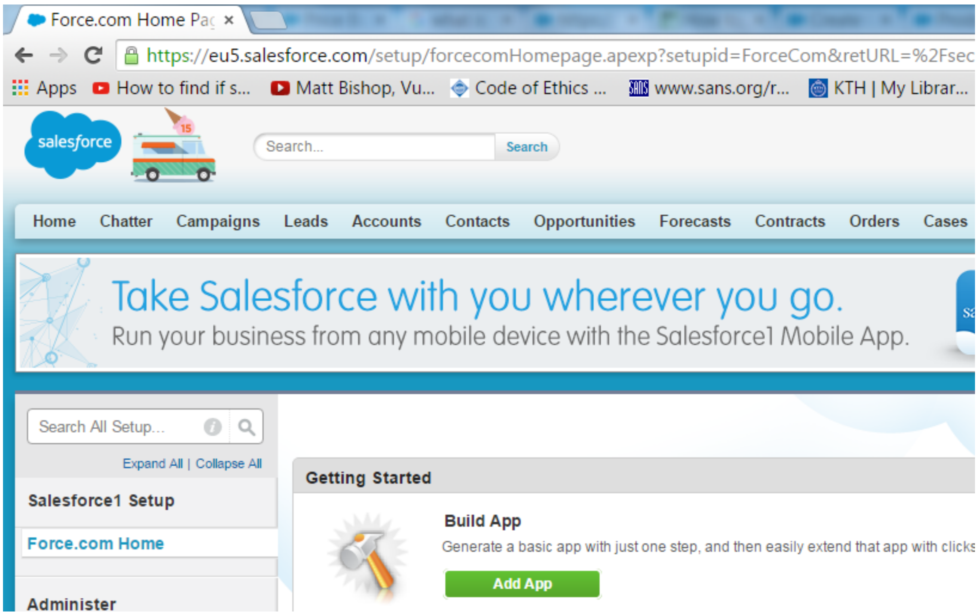


To switch to the environment where you can actually work with Salesforce.com and Force.com

- Click on Your name as shown below
- Select **My Developer Account**
- Now you will be able to login to: https://login.salesforce.com/?lt=de



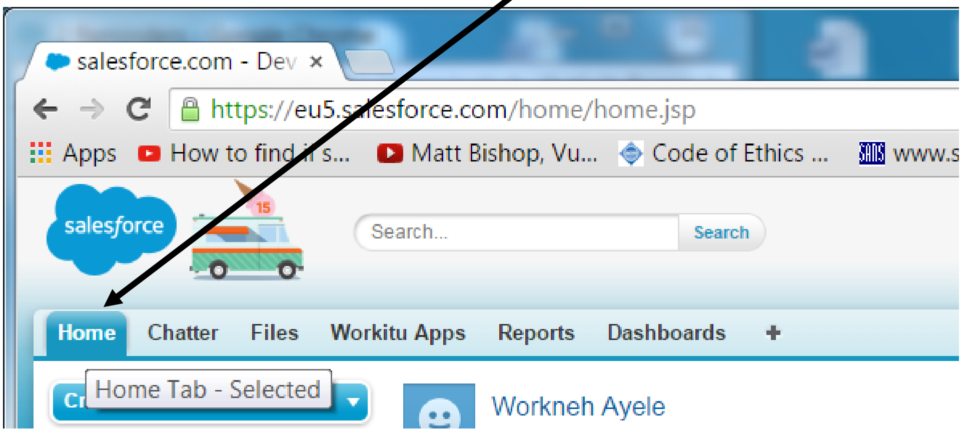
- Enter username and password
- Click **Log in to Salesforce**
- Now you are in **Force.com** as you can see on the title bar



- This is **Force.com** PaaS – here you can do customization, build apps, etc.

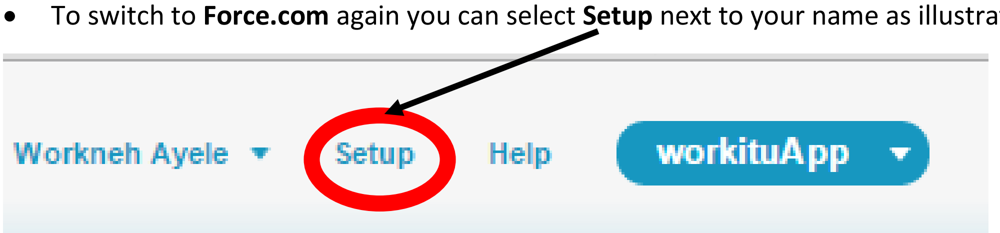
Switching between Force.com and Salesforce.com

- **Salesforce.com** is **SaaS** you can select **Home** tab or any tab to switch to **Salesforce.com**



(Force.com is **PaaS**)

- To switch to **Force.com** again you can select **Setup** next to your name as illustrated below



- Select Force.com Home from the left side of the screen

Exercise: what is the difference between Force.com and Salesforce.com?

2. Part three – Managing Users, and Customization

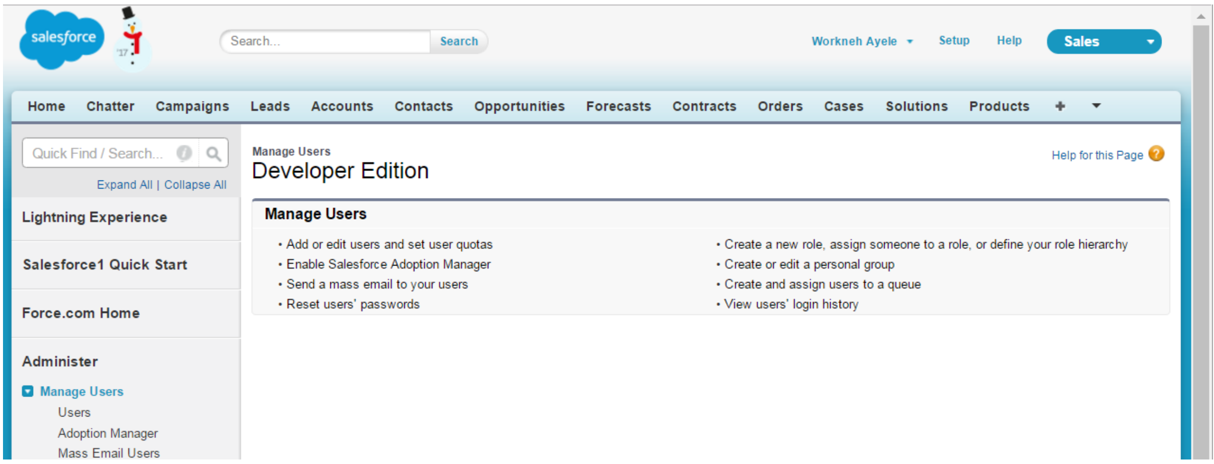
Creating salesforce users

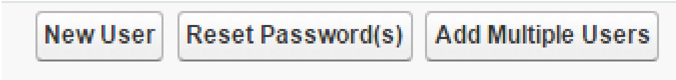
Platforms

Salesfoce1 – visualfoce/Force.com – PaaS/

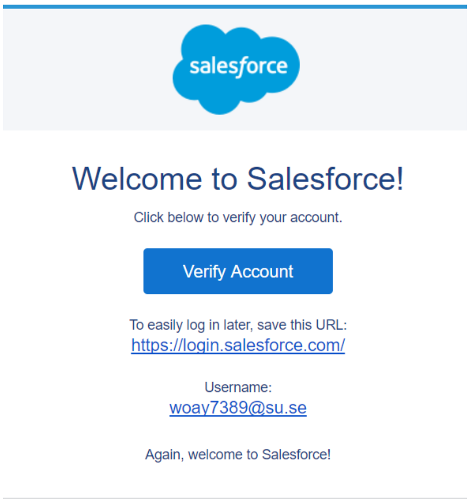
Salesforce.com – SaaS /The CRM as a Service/

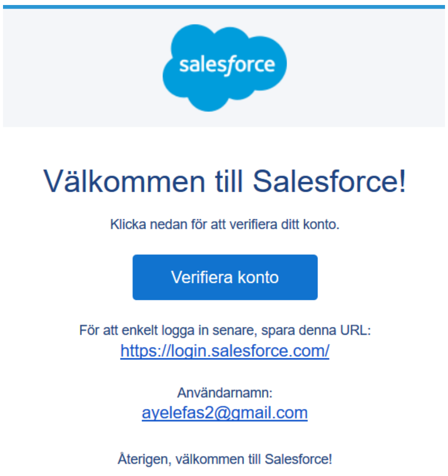
- If you are in Salesforce.com click **Setup** next to your name on the top-left corner of the screen
- Click on **Mange Users** under **Administer** as illustrated in the last diagram on the left side
- Select **Users**





- Select **New User** button
- Under **User License** select **Salesforce** (you can create three Salesforce accounts for developer edition)
- Enter a user with one of your group member's information like **General Information**, enter First Name, LastName, email address username, nickname, and use three letter abbreviations for Title – Mr, Mrs, or Mss do the leave the Company, Department and Division empty and also leave the rest of the text boxes empty in order to save your quota in Salesforce (remember you can only save 5MB of information)
- Remember you cannot use duplicate user names
- Select **Salesforce** under **User License**
- Select **Marketing User** from **Profile**
- Check **Marketing User**
- Click **Save**
- **Note: -** the account will be accessed only when the new user opens her/his email and follow the link to set a new password. And after the new user enters his new password the following window appears where you can invite your colleagues for chatting. Login to the new account in a different browser or computer.
- Then you can open your new user account by opening an email sent from sales force and selecting **Verify Account** or **Verifiera Konto**





- Follow the instruction to setup your account
- Login to your new account

- Change the setting to Salesforce Classic

Now switch to the first user, use the first account, administrator.

Exercise: The first user account you created is an administrator account, who created the user in the previous step. Create one more user with a different username, now you can use the same email if you are only two working together, the new user must be **Salesforce classic user**.

Exercise: Can you delete a user? So what can you do if you want to delete a user? Try to delete the last user. Can you delete the last user? - discuss within your group, and you will also demonstrate with your tutor if you are asked to do so.

In this section you will only go read the procedure described here to learn another way of creating users

Creating multiple users

1. Select **Setup** then on the left bar click on **Manage users**
2. Then select **Users** - now you will be able to create users

Or

1. Select **Setup** next to your user name in your salesforce environment
2. From quick links you can select **Add multiple users (many users) or New User to create one user only**

After you create a user with an email, you will receive an email sent to the account just created to enable the activation of the account.

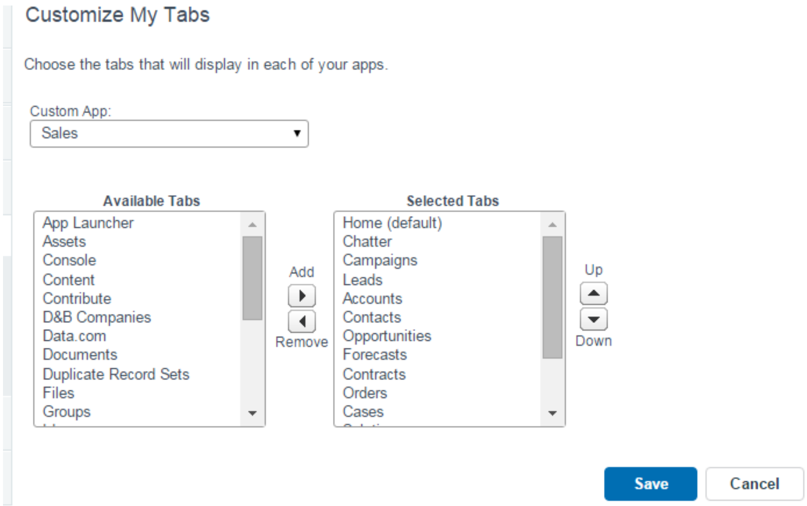
Customization

Here you will not change anything, so you will click Cancel after you finalize these.

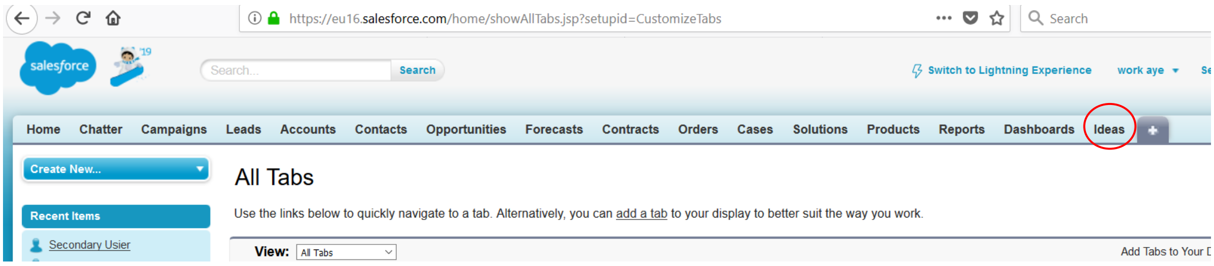
To customize tabs and change the default display for the apps like for Sales, Call Center and so on

- Select **+** or **All Tabs** from the tabs bar
- From the right side select **Customize My Tabs** 

- You can select Custom App: - here **Sales** is the default App



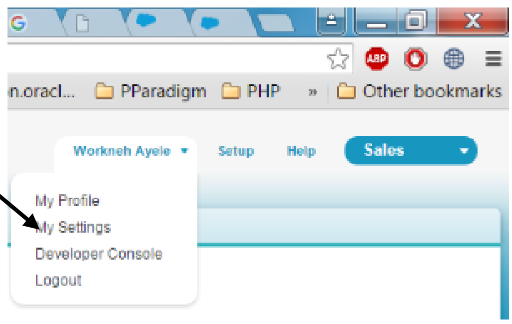
- You can select **tabs**, such App Launcher, Assets, etc.., from **Available Tabs** and click **Add** or select tabs from **Selected Tabs** then click **Remove** to remove
- Add **Ideas** from **Available Tabs** to **Selected Ideas**
- You can click on **Save**
- Now you can see these default tabs changed by selecting the menu from the **App Menu** as shown below …



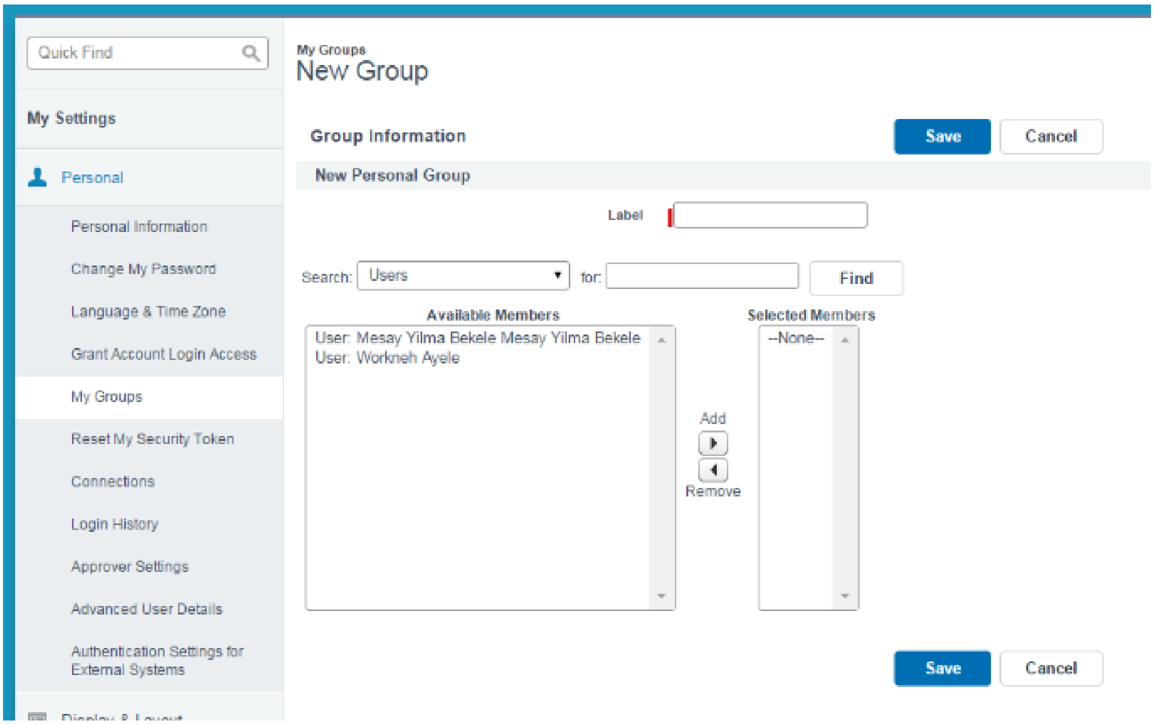
Creating user – groups

To view or modify all your personal setup options

- Click on **My Settings** after clicking on your name as shown in the diagram here
- Select **Personal** from the left sidebar here
- Select **My Groups** and click New Group
- Enter group name under **Label**, here enter – **KistaSalesGroup**
- Select Users from **Search**
- Select the users you created then select **Add**

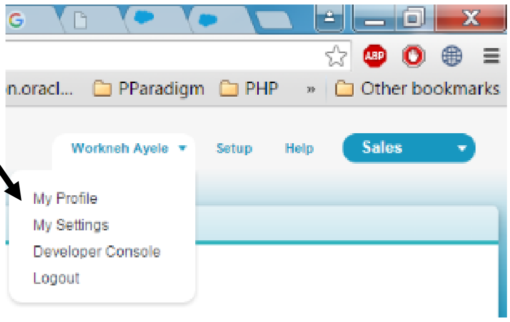


- Click **Save**

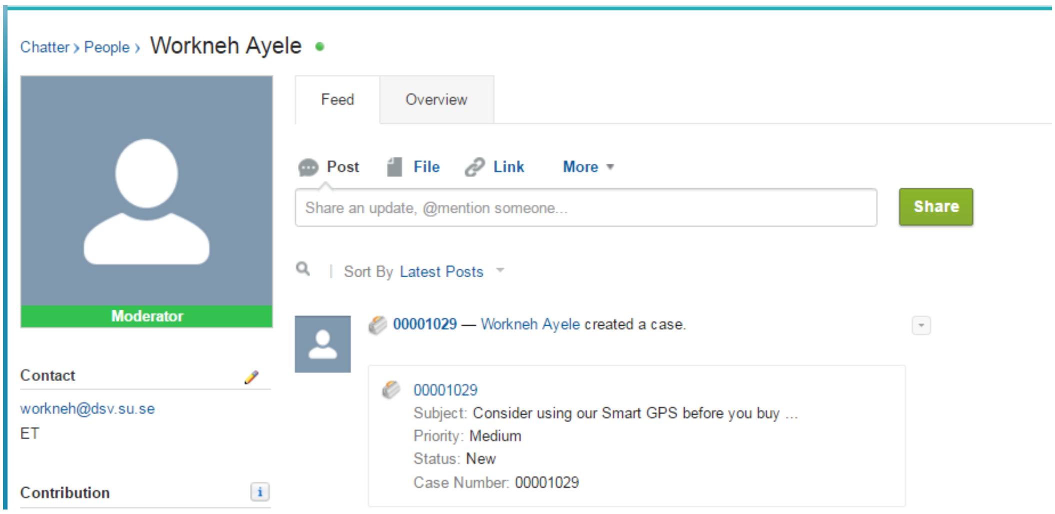


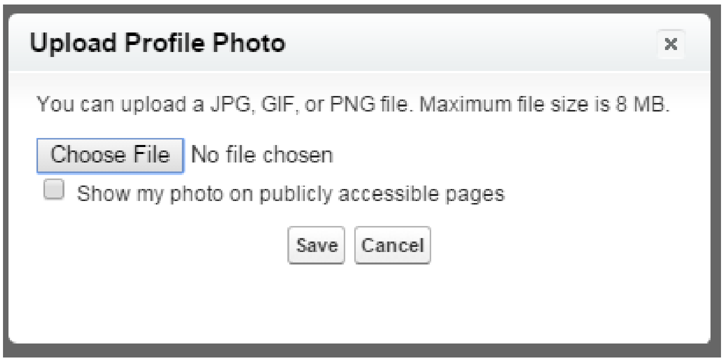
Customizing your profile

<u>Adding photo</u>



- Click on **My Profile** after clicking on your name **Setup**
- Click on **Add Photo (Moderator** will change to **Add Photo** when you hover your mouse over it**)** to **Add your photo** then add Browse to locate your file select **Choose File**
- Specify the location of the file **<u>(please do not select any file because if you are using unlicensed version then you will be limited to 5MB and your quota will be exhausted)</u>**



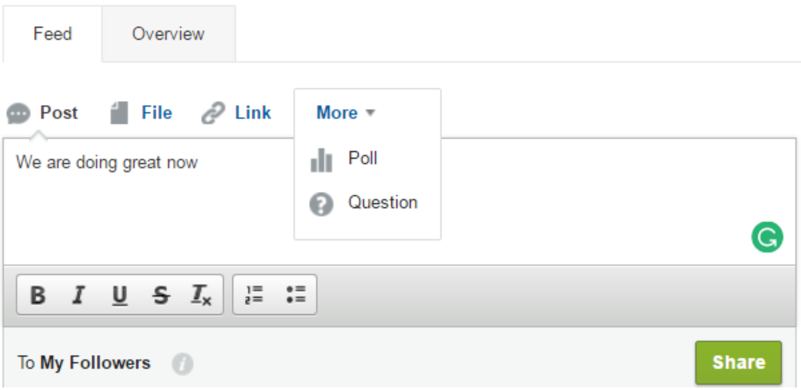


- If you have selected a picture then you can check **Show my photo on publicly accessible pages**
- Click **Save** if you have added a picture already or you can click **Cancel** to cancel if you don't have profile picture

Exercise: Your accounts should follow each other so that each account chatter feed gets information when another account posts. – Hint: use Chatter tab

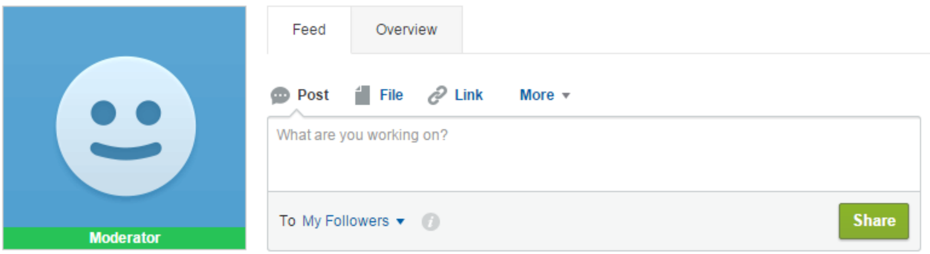
Entering feed information

- Select **Chatter** tab
- You can select Post or File or Link or More (Poll, Question) as illustrated below



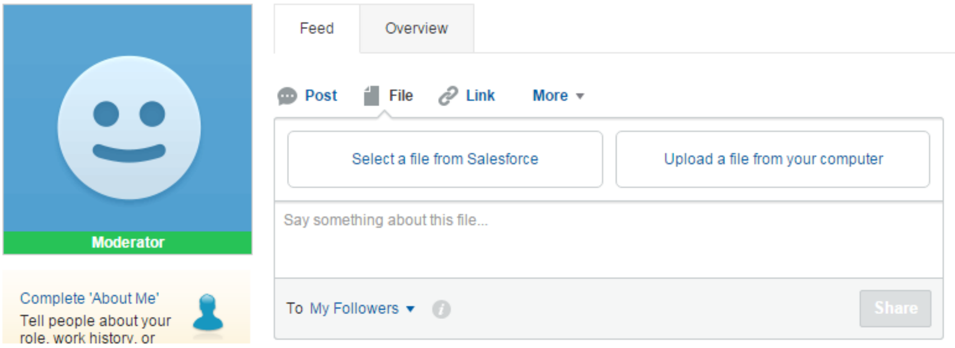
- Select **Post**

Post –Here you can Post your idea to your collogues using salesforce or with your customers using social media



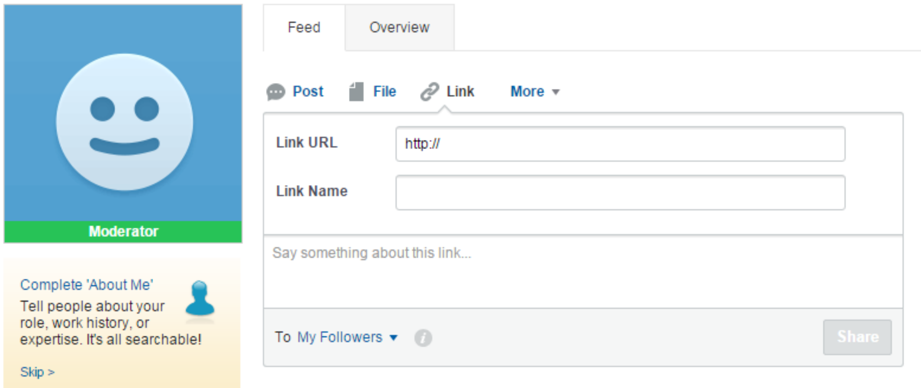
- Enter information like what you are working on, example: - we are upgrading our online point of sales app
- Click **Share**

File -Here you can share files from salesforce or from your personal computer



- You can share files you already created here, or you can upload a file from your computer, then you can write some comments related to the file
- Click **Share**

Link -Here you can share links to a website



- You can enter url or link under **Link URL** and name of link under **Link Name** to share
- then you can write some comments
- Click **Share**

More

- To collect Poll or gather opinion about something and

Question

- To collect some answer for your question from your colleagues

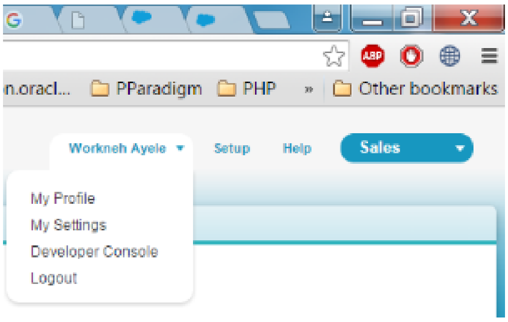
Exercise

Create Poll for your colleagues the poll can be created to answer the question "How should we market our new product?"

Chatting - during examination of the lab exercise use your two users and demonstrate from two computers or two different browsers to your teacher that you are able to chat.

Here you will only go through the steps to familiarize yourself with some customizations

To view or modify all your personal setup options



- Click on **My Settings** after clicking on your name as shown in the diagram here
- Here you can change your password, manage chatter email notifications, customize your tabs, edit your personal information and so on
- Look at your left sidebar here
  - **Personal – to modify or view**
    - Personal Information
    - Change My Password – to change your password
    - Language & Time Zone – change language and time zone
    - Grant Account Login Access
    - My Groups
    - Reset My Security Token
    - Connections
    - Login History
    - Approver Settings
    - Advanced User Details
    - Authentication Settings for External Systems
  - **Display & Layout**
    - Customize My Tabs
    - Customize My Pages
    - My Social Accounts and Contacts
    - Accessibility
  - **Email**
    - My Email Settings
    - Email Templates
    - Mass Emails
    - My Stay-in-Touch Settings
  - **Chatter**
    - My Feeds
    - Email Notifications
  - **Calendar & Reminders**
    - Calendar Sharing
    - Activity Reminders
  - **Desktop Add-Ons**
    - Check for Updates
    - Salesforce for Outlook
    - Force.com Connect Offline
  - **Import**
    - Data Import Wizard

Customizing Tabs

Exercise: Here you will change **Campaign** to **Promote** (Singular) and **Promotions** (Plural)

- Select **Setup**

- From the left sidebar select **Customize** > select **Tab Names and Labels** > select **Customize application tab names and field labels**
- You can select **Edit** next to the tab name you want to rename
- You can change the name of the tab – enter singular and plural forms
- Click **Next**
- Then you can edit the standard field labels here also, leave it as it is for now (or Select **Reset** if you have changed these names and clicked on **Save**) > then click **Save**

Customizing Activities – Task Fields or Event Fields

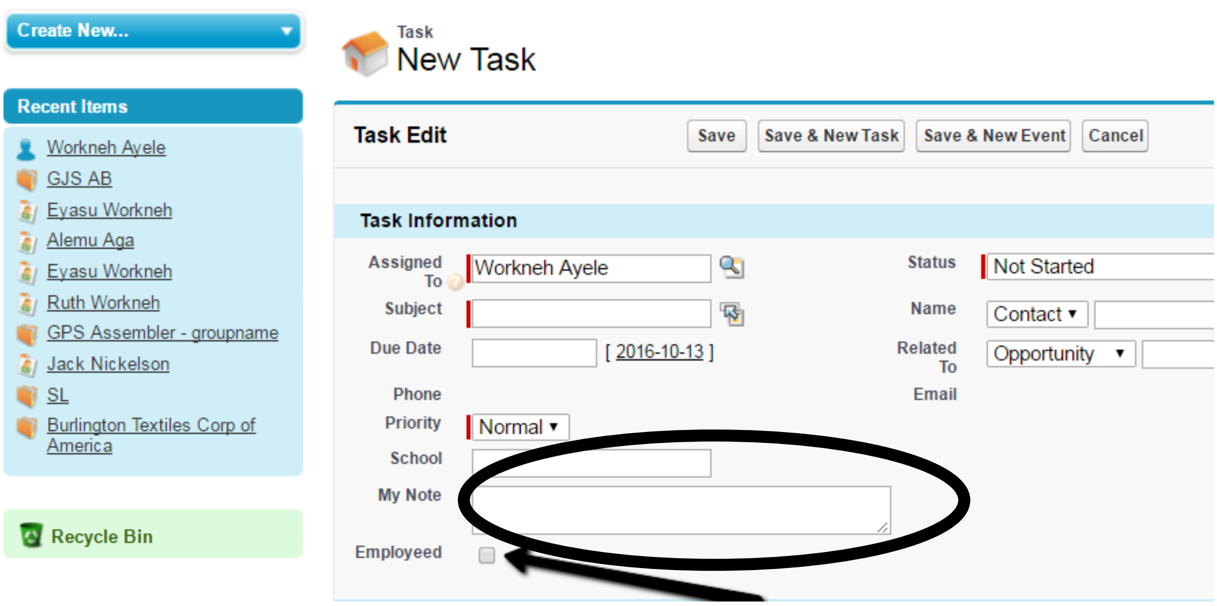
Here you will learn how to add custom fields in tasks, the field you created here will appear when you create tasks. For example create

- Select **Setup**
- From the left sidebar select **Customize** >
- select • **Customize your Activities**
- select • **Add a custom field to activities**
- Select **New**
- Select **Text Area** under Data Type > Select **Next**
- Enter My Note under **Field Label** MY_NOTE under **Filed Name**
- Under **Help Text** enter – “this is a custom field to store personal reflection”
- Click **Next** again
- Check **Visible** that means everything will be select
- Click **Next** again
- Click **Save**

If you want to check that the field just created is available in new tasks or even pages then you will see the field on the next field.

- Click on **Home**
- Select **Create New…** 

- Select **Task**
- After checking that your new field is created click **Cancel** (before you cancel your screen should look like the screenshot below)



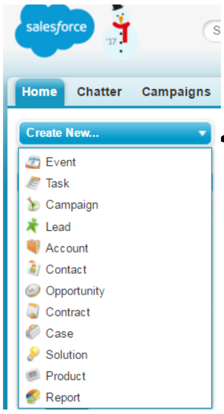
In this illustration or example the activity selected is Employed (you can create Employed if you like) and My Note

When you are done with this lab, ask your tutor how the custom task field just created can be deleted and edited if you don't know how to delete or edit.

3. Using Salesforce for CRM

Creating Events

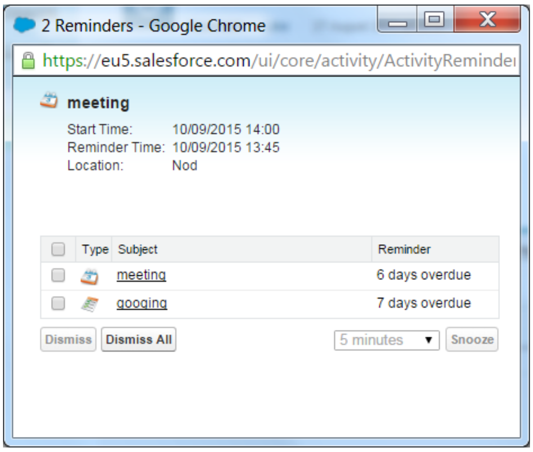
Event – represents an event in the calendar. In the user interface, event and task records are collectively referred to as activities.



Steps

- If you are on the Salesforce1 /Force.com platform click on Home tab
- Click on **Create New**… on the left sidebar
- Select **Event**

– create an event with subject name – meeting – GJS A. Then under contact select your lead (if you have already created a lead now you don't have any lead), selected opportunity under Related To (if there is an opportunity created before relevant to this meeting), the location should be at M20, specify the start and end time to be during the lab session, add description that there will be coffee, tea, fruits and drinks. The meeting should take place every day for three days.



Note – you will have a popup dialog box/browser to remind you the event

- Allow pop up from salesforce in your browser in order to see such pop up dialogs

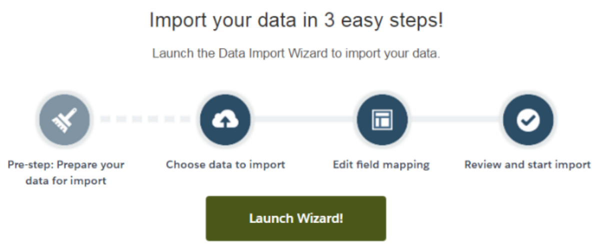
Creating Account

Account: – An *account* is an organization, company, or consumer that you want to track—for example, a customer, partner, or competitor.

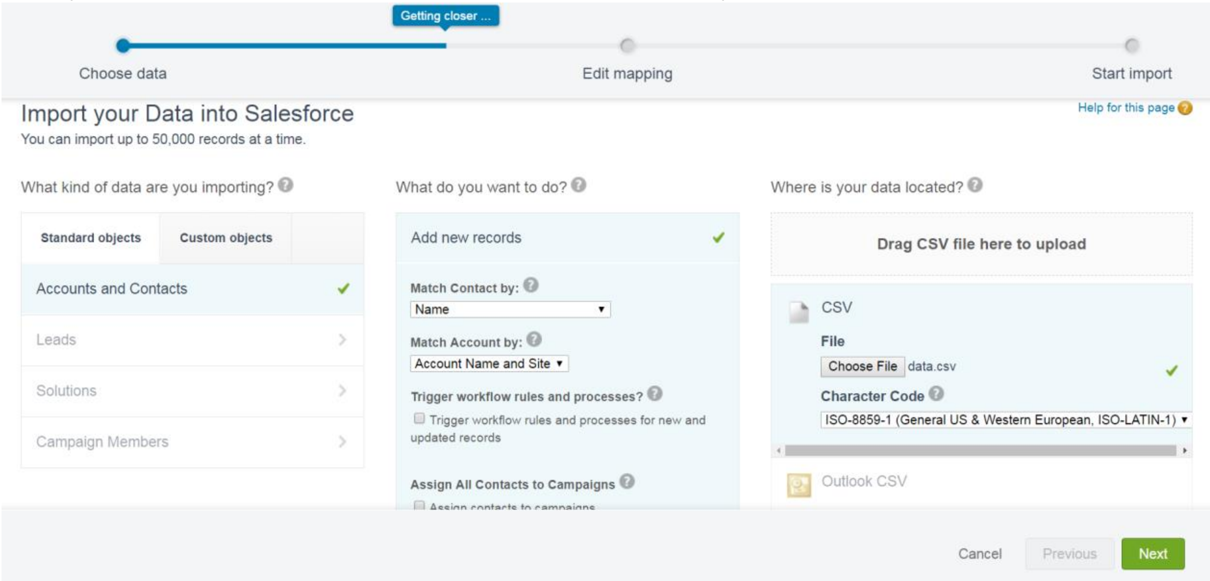
Exercise: By now you should be able to create a new account. Create a customer (account): akademibokhandeln, specify **Account site** as akademibokhandeln-FIRSTname.se and specify the address of this company.

Creating Account by importing Account from csv file

- Download the CSV (data.csv) file available on iLearn2 and save it on your desktop
- Go to your **Salesforce.com**
- Select **Accounts** tab



- From **Tools** section your **Accounts** page select **Import Accounts & Contacts**
- The **Account Wizard** will be launched.
- Under **What kind of data are you importing?** Select **Accounts and Contacts**
- Under **What do you want to do?** Select **Add new records** and Select **Name** under Match Contact by: and **Account Name and Site** under Match Account by: **Name & Site**



- Under **Where is your data located?** Select **CSV**
- Select **Choose File** to specify file location
- Select click **Next**
- Fix mapping problem if any by yourself…
- Next > **Finish**
- Click **Start Import**

Create a new product:

Exercise: Creating Products – here you will create a new product – Smart GPS, price 1500 Sk.,

- Select **Product** from the **Create New** drop-down list in the sidebar, or Select **Product** tab then select **New**
- Enter Smart GPS under **Product name** for the product.
- Enter product details any additional information for the product that is product description
- Mark products as **Active**
- Click **Save**
- Click **Add** Under standard price then enter the price > **Save**
- Add standard price 1500
- Click **Add to Price Book** under **Price Book** from the Price Books related list to include the new product in a price book. Products must have a standard price before you can add them to a price book. See Set Product Prices. **Price Book is a list of products that your organization**

sells. You will need to create price book for mutually exclusive products: ones that will never exist on the same opportunity[1]

- Check Standard then click Select
- Now you can check use Standard Price, for the product created by you.
- Enter **List price** 1400
- Click **Save**

Campaign

A marketing initiative, such as an advertisement, direct mail, or conference that you conduct in order to generate prospects and build brand awareness.

Preparing for campaigns[2]: -Before we do campaigns we need to:

- Define the goal of the campaign
  - Lead generation – direct mail, email, web seminars, conferences, and trade shows. Such campaign can be measured.
  - Brand building – print advertisement, billboards, and radio advertisements. These kind of campaign cannot be measured directly.
- Determine how to target campaign group – use existing customers or prospects (existing leads and new leads).
- Categorize campaigns – target of product or service that you offer identify your publication type to use such as: use magazine, newspaper …
- Tracking campaign responses –response channels can be: web-form, phone, personal email, and registration attendance of some event (conference, tradeshow, and or webinar)
- Define campaign access – which group users should access in your organization campaigns.

<u>**Exercise: -**</u> here you will create a campaign to sell your product, Smart GPS, to your customers. You will also make phone calls to your customers and note about your call log on activity history. Before you do the exercise change the Promotion or Promote tab to Campaign if you haven't done before.

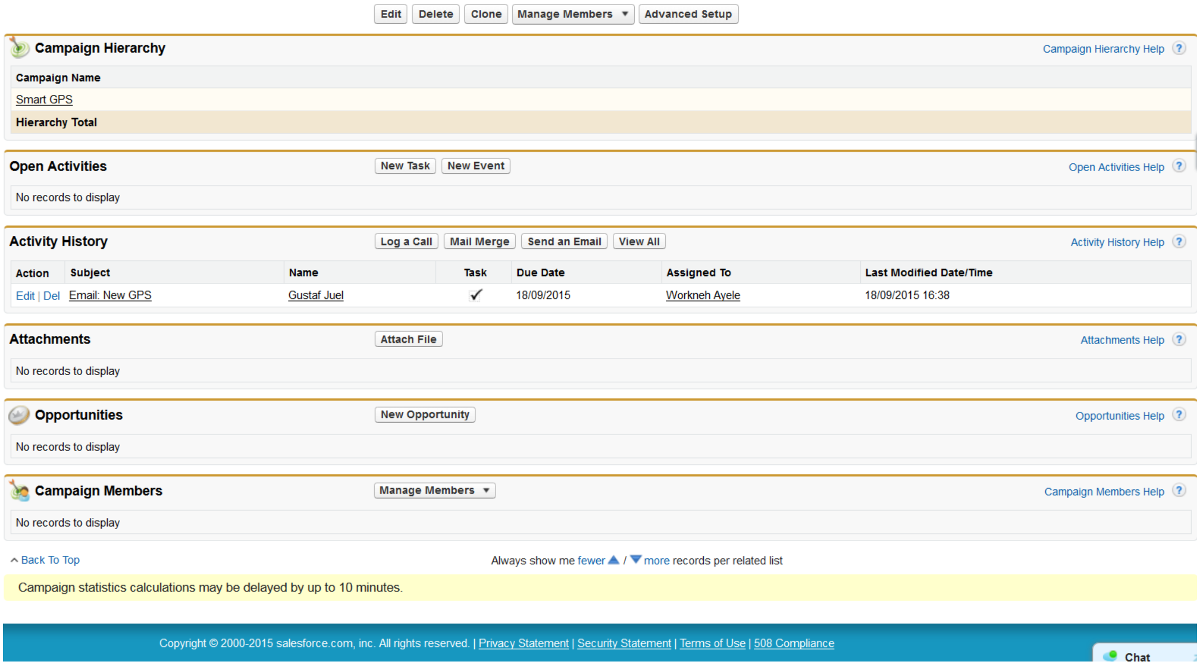
<u>**To do: Create an email campaign**</u>

- Select **Campaign/Home** tab
- Select **New**
- Enter **Campaign name – Smart GPScampaign**
- Check **Active** ☑ - (But it should finally be unchecked when the campaign retires, completed, or aborted later on)
- Specify Type, **Status** – Select **Planned** (It is also possible to select **Planned**, **In Progress**, **Completed** and **Aborted**)
- Specify **Start Date** and **End Dates**, **Expected Revenue**, **Budgets cost**
- Specify **Actual Cost** if you know how much you will spend, it is preferable to leave it empty and fill it later on
- You can leave **Num Sent** and **Expected Response** empty if you are not using existing Leads and Contacts
- Leave **Parent Campaign** empty – parent campaign is used when you have a hierarchy of campaign.
- Finally click **Save**

---

[1] https://eu5.salesforce.com/help/pdfs/en/salesforce_products_cheatsheet.pdf
[2] https://login.salesforce.com/help/pdfs/en/salesforce_campaign_implementation_guide.pdf

- Select the Campaign you just created above from the left hand side of the window
- The campaign page will expand to show you the following link
- Now you will be able to see Campaign hierarchy if there is any activity /Event/ by



- **Note**: -Under Open Activities you can create event(s) by clicking **New Event** - Under Activity History you can make phone call campaign and log the information by selecting Log a Call, you can click **Mail Merge** to do Mail Merging, you can send an Email by selecting **Send an Email**, you can click **View All** to view all activities related with the recent log, you can attach files (such as Microsoft Office documents, Adobe PDFs, and images and videos) by selecting **Attach Files**, you can select **New Opportunity** under Opportunities to create opportunities, and finally you can add members to the campaign from your employees or users by selecting **Manage Members.**

Exercise: Create a meeting (an Event) with the users (your colleagues) to discuss campaign activities without leaving the screen.

<u>Lead</u>

- Lead is a sales prospect – who has expressed interest in your product or company, lead can also be obtained from social media messages expressing interests.

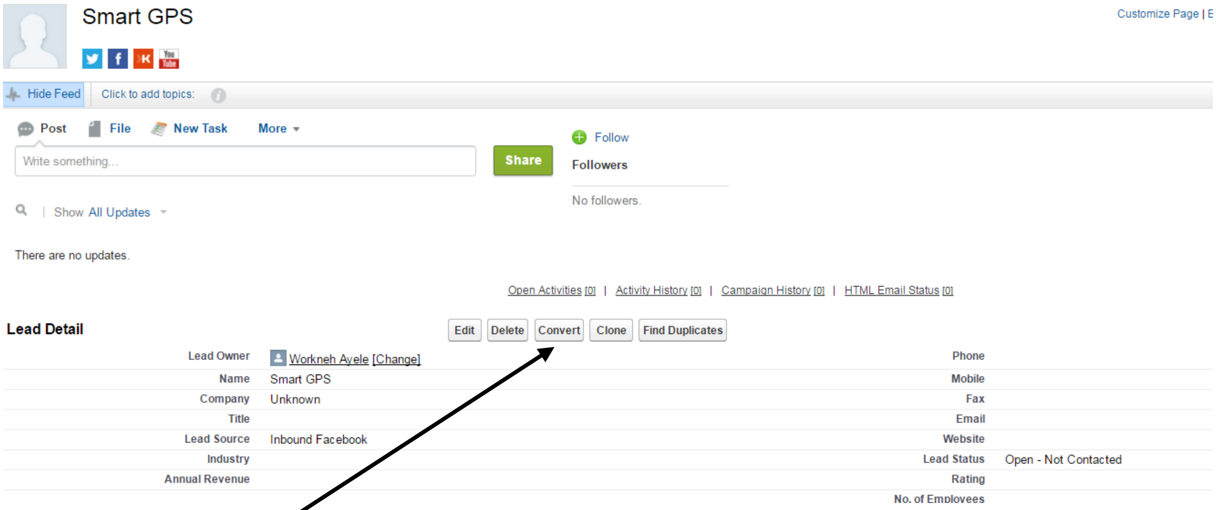
Create a lead

- Select **Home/Lead** tab
- Select **Create New**
- Select **Lead**
- Enter First and Last Name, Company, telephone and email – you are free to add anything
- Specify **Lead source**
- Select or Specify the Campaign created before, **SmartGPScampaign** Specify Lead Status – now the lead status should be **Open – Not Contacted**

- Enter rating to **Hot**
- Enter **Description** – This potential customer wants to buy Smart GPS with an estimated price of 250,000 SK.
- Click **Save**

Converting lead to Account

- If the lead is not opened find it under Lead tab and select it (please note that the lead illustrated in the figure below might have a different name)



- Click **Convert**
- Check **send mail to …** to send mail
- Add comment and then click **Convert** again
- Now you will be able to see the Account with header fields Contacts, Opportunities, Cases and so on.

Creating contacts

- Select **Contact** tab
- Select **New** or Select Create New > then Select Contact on the left side-bar
- Enter account information
- Specify **Account Name** to which the address is associated (if you have Account related to this address)
- Click add whatever is necessary > then click **Save**

Exercise – Create a new contact with your name and address and assign this contact address with Dickenson plc. Dickenson plc is an account/customer/ that is already created for you by Salesforce org. There are contacts, accounts, etc. already created for developer edition users like you.

Exercise: Create an opportunity from the following email sent to your company directly from SL – "We serve over one million passengers every day in Stockholm and suburbs. Our company, SL, wants to upgrade the traffic geographical information systems that is used to trace and guide our local buses. The new GPS needs to have the capability of storing each trip, for example what time the bus leaves and arrives at each station on its route and finally transmit this information to our server. This will help us improve our service performance by analyzing the collected data against time table for each bus in our city. We would like to buy 10,000 GPS devices that can be integrated with our bus lines geographical information systems. Your company is one of few short listed GPS providers in Stockholm

Sincerely

Jack Nickelson

Sales and procurement manager

08111111111, youremail@yourdomian.com ”

Opportunities – Opportunities track your sales and pending deals.

When a potential deal emerges from a lead you’ve been working on, you can convert a lead to create an account, a contact, and an opportunity record. Opportunity record helps you set the deal size, stage, and timing, making it easier to track in your sales funnel. It also helps you manage all of your deal closing activities in one convenient place. The account record tracks all of this information across all opportunities over time[3].

Creating Opportunities

- Select **Opportunities** tab then click **New**
- Or Select **Create New** > then Select Opportunity on the left sidebar
- Enter **Opportunity Name** (GPS for bus)
- Specify **Account Name** to which the opportunity is associated with, since you have no account related with this opportunity enter “SL” under **Account Name**
- Select New Customer under **Type** since SL is a new account
- Select Other under **Lead Source**
- Specify **Amount** 10000
- Specify closing date make it current date
- Under **Next Step** enter – prepare proposal or quote
- Under **Stage** select Prospecting
- Under **Probability(%)** enter 65
- Under **Primary Campaign Source** select **Smart GPS** (this is the campaign you will run on Facebook, but since you have advertised this campaign on your website you have received email)
- Under Delivery/ Installation Status select **In Progress**
- Click **Save**
- After you Save **Product** bar will appear > select **Add Product** the check on Smart GPS > Click **Select** enter 10000 under **Quantity** > click **Save**

Do the following by yourself

  - Schedule a meeting with your colleagues to handle this opportunity. Hint: Task or Event
  - Make a phone call to SL contact person (assume you have done this) then record this in **Log a Call**
  - Enter **Elgiganten** as your competitor.
  - Select **Home**

You won the Opportunity

- Change progress **Stage** to **Closed Won**

[3] http://www.salesforce.com/products/30daytrial/links/create-opportunity.jsp

- **Select Yet** to Begin under **Delivery/Installation Status**

Case

Detailed description of a customer's feedback, problem, or question. Used to track and solve your customers' issues.

Exercise: Make sure that Jack Nickelson is a contact person for SL Account before you begin this exercise. Mr. Jack Nickelson had made a phone call to you to follow up on the installation of the new GPS and the testing process. Since you are responsible for handling the installation of the GPS you need to create a case and see how things are going. Create a case "SL-Case" with the contact person you have created under SL. The customer or the account assigned in this case is SL, set the status as **Working**, priority **High**, type **Electronic**, Case Reason **Equipment Design.** Also record the fact that Smart GPS is under testing on Line 4 – (between Råduset to Gullmarsplan).

4. Integrating apps developed by third party vendors

Integrating and Installing third party apps

- Start a browser preferably Firefox
- Browse to - https://appexchange.salesforce.com/
- Get it now
- Enter your username and passwords – login as adiministrator
- Search and Select **Apps**, here you will be able to intall apps inorder to be able to integrate work with them. Some apps are free while most apps are not, therefore if you would like to experiment on this applications you can choose **Free Apps.** For now select any app you would like to install.
- Select **Get it Now**
- Select **Install in production** - this is valid active, trial or developer orgs
- Check **I have read and agree to the terms and conditions**
- Now you can select **Confirm and Install** button to install
- You might be prompted to login again
- Select **Login**
- Select **Install for Admins Only**
- Select **Install**

Note: There are issues with the app these days, so if you can integrate the Facebook with Salesforce that will be enough.

Setting up facebook fan page to access it via Salesforce

What is a Facebook Page?

Note: Facebook page can be accessed by anyone with without facebook account, however one can not click **Like** with out signing in or signing up to Facebook. Facebook page should be unique so use your group number and SOADSV-SmartGPS- groupnumber.

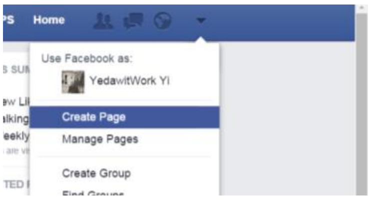
Facebook pages allows one to share one's businesse area, brands and organizational stories. Pages also allows connect with people fans from all over the world. You can customize your pages by publishing stories, hosting events, adding apps and more. People who like your Page and their friends can get updates in News Feed. You can promote your post/product/event on Facebook by paying or freely depending on budget.

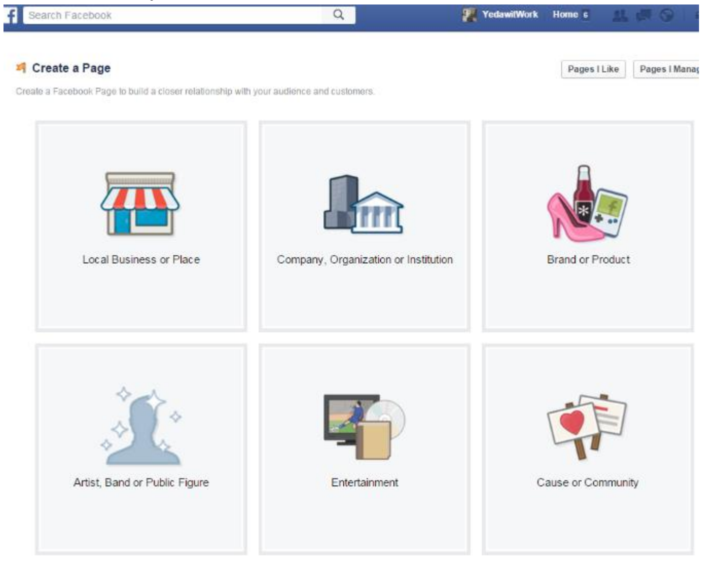
You can create and manage a Page from your personal account.

Note: **<u>If you want to create a Page to represent a business, brand, organization or celebrity, you must be an official representative</u>**

Create Facebook page

- Login to your Facebook or signup / it is preferable if you use an old facebook account





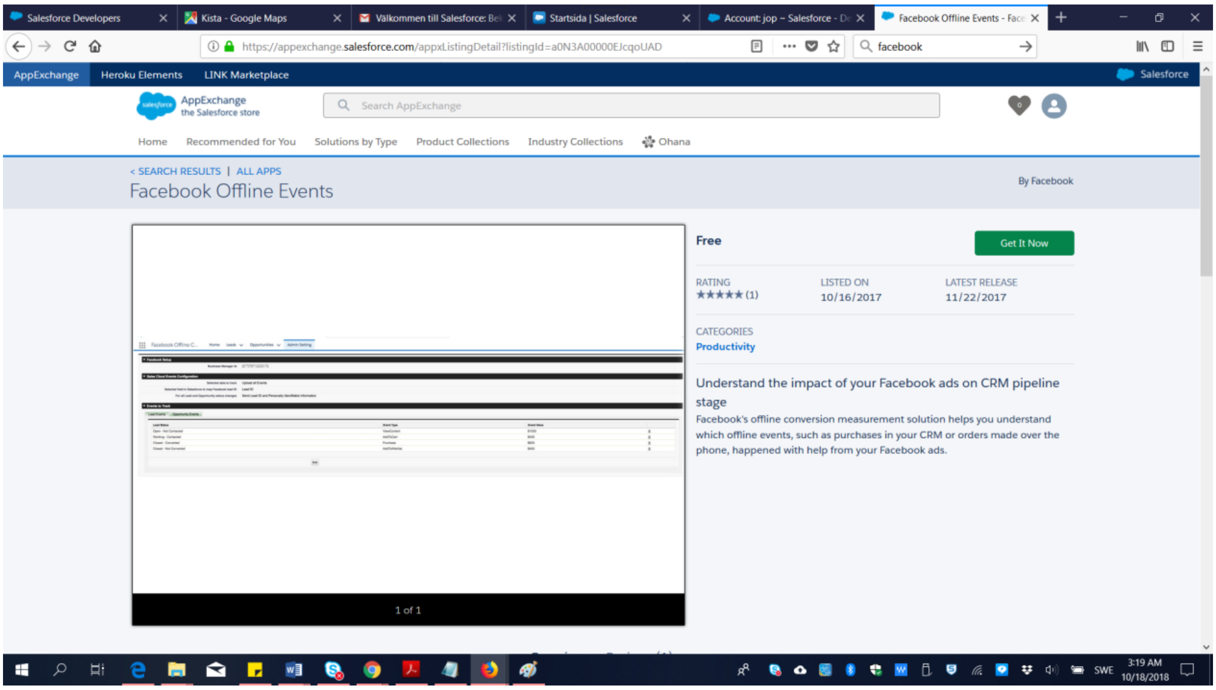
- Select **Create Page** from the little down arrow on the right corner of the windows
- Select the category of page you want to have. here **Company, Organization or Institution** is better choice but you can also select **Brand or Product**
- If you chose Company, Organization or Institution… select Retail and Consumer Merchandize and the company name SOADSV-SmartGPS -_*groupnumber*,
- or if you select Brand or Product selctct Electronics under category and name it SOADSV-SmartGPS- *groupnumber.*
- Select **Get Started**
- Specify About your company and enter your website if you have one click sabe
- Upload Profile Picture – here you can upload or you can skip you can upload here uncopyrighted pictures like your picture, or something
- You can add your page to your Favourites if your like or Skip if you are not interested
- Click Next
- Specify your prefered audience then click **Save**

5. **Integrating Salesforce with Facebook Offline Events – this step can take time until the server responds to your installation to work.**

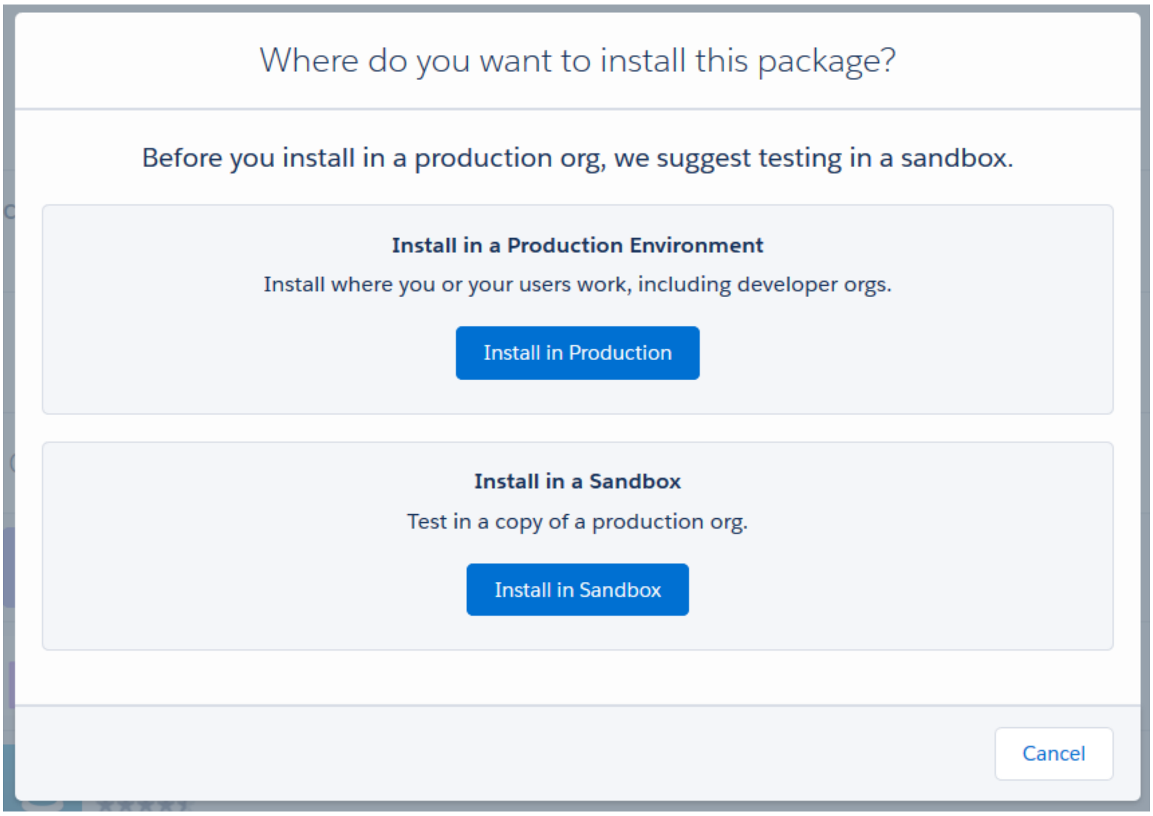
- Browse to - https://appexchange.salesforce.com/
- Select **Login**
- Enter your username and passwords – login as adiministrator
- Search and Select **Facebook Offline Events**

https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EJcqoUAD

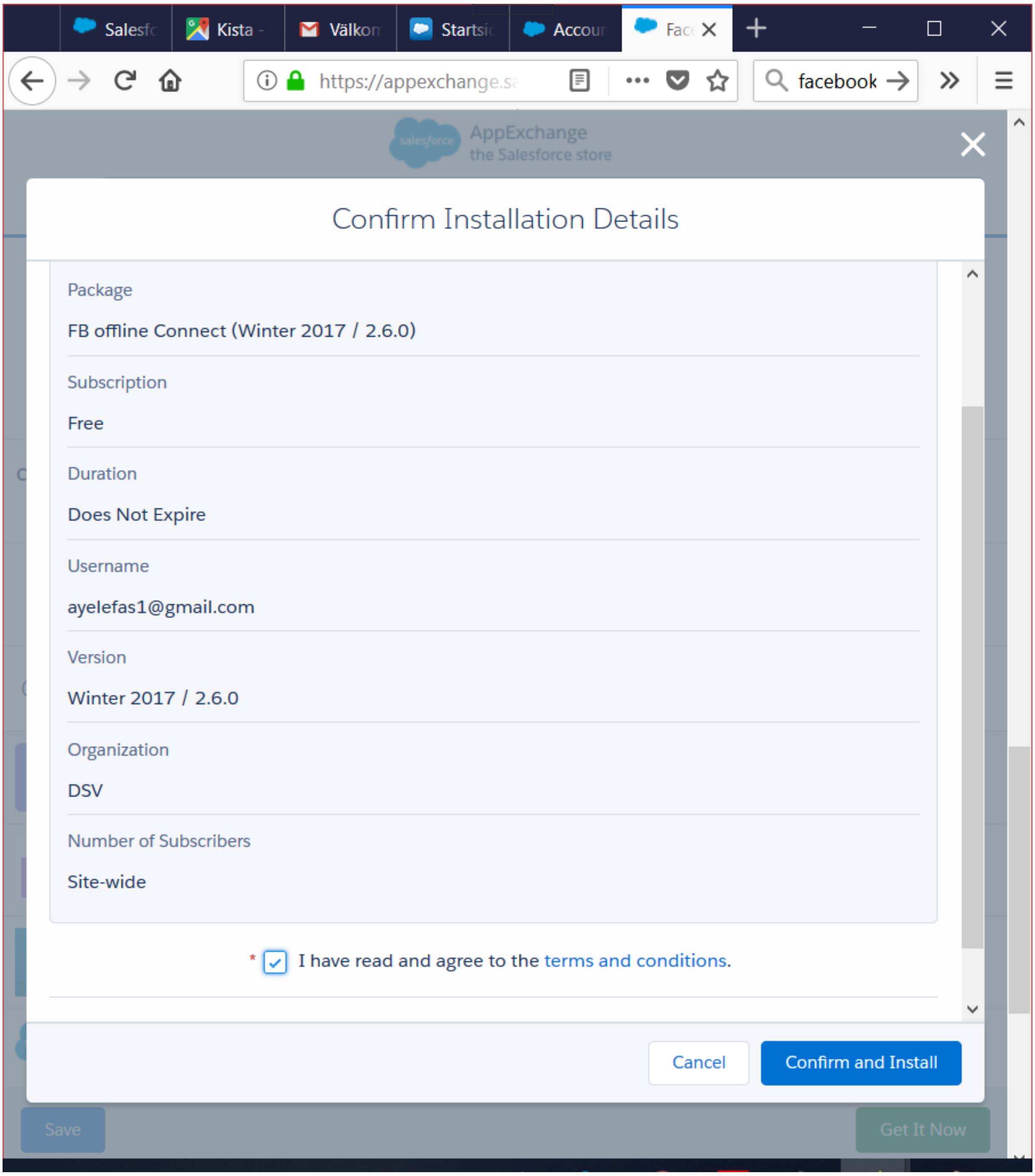
- Select **Get it Now**



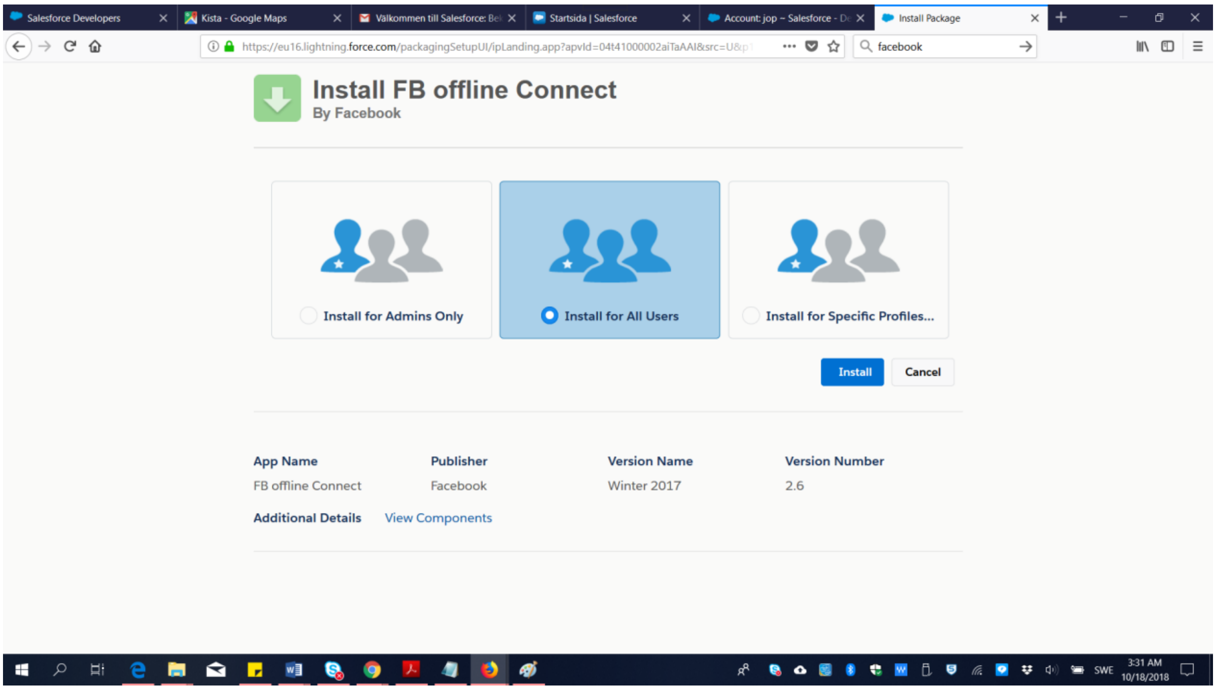
- Select **Install in production** - this is valid active, trial or developer orgs

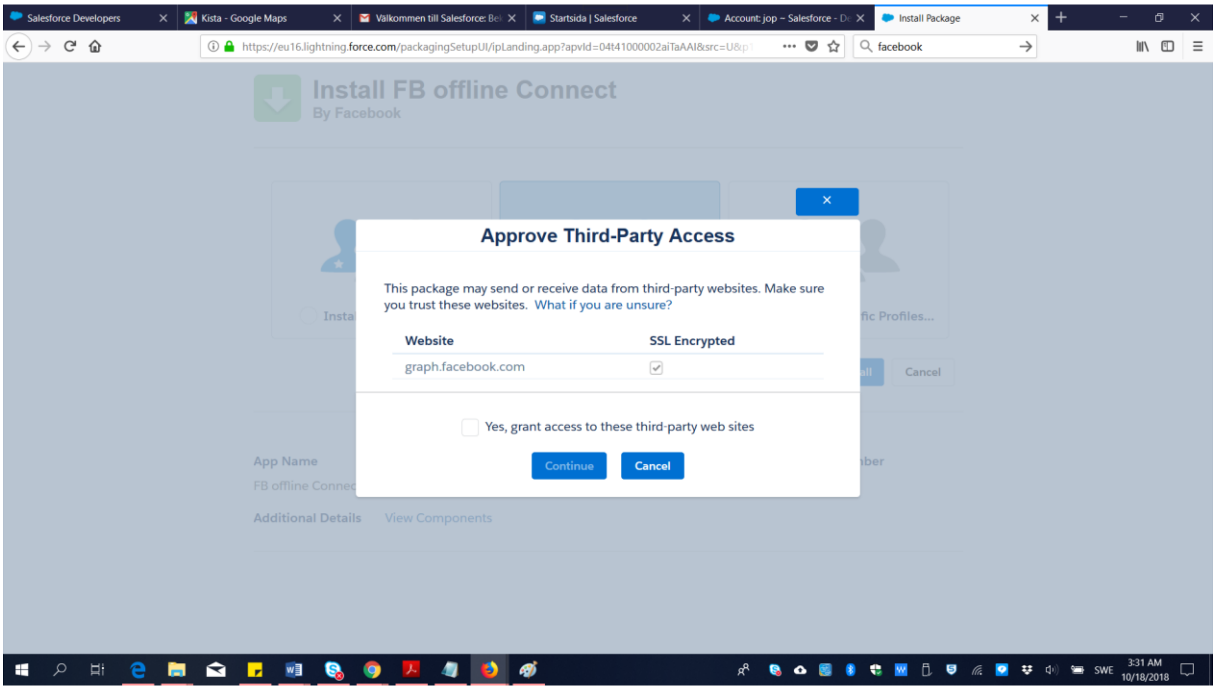


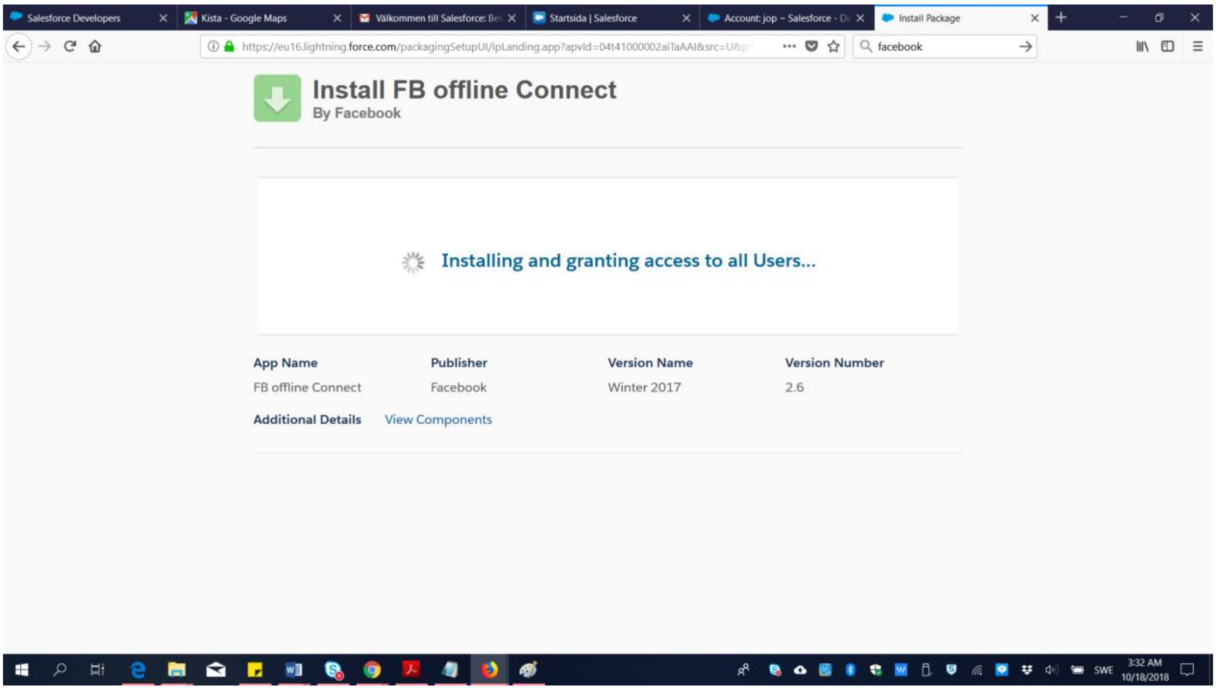
- Check **I have read and agreed** and select **Confirm and Install**

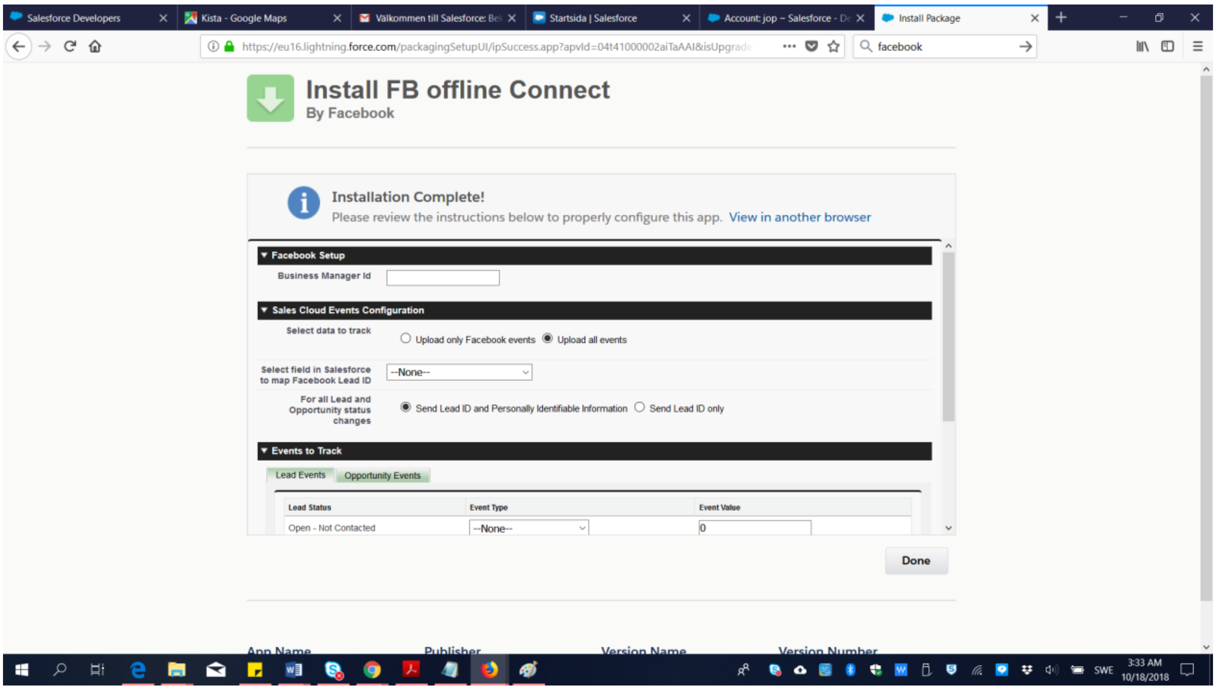


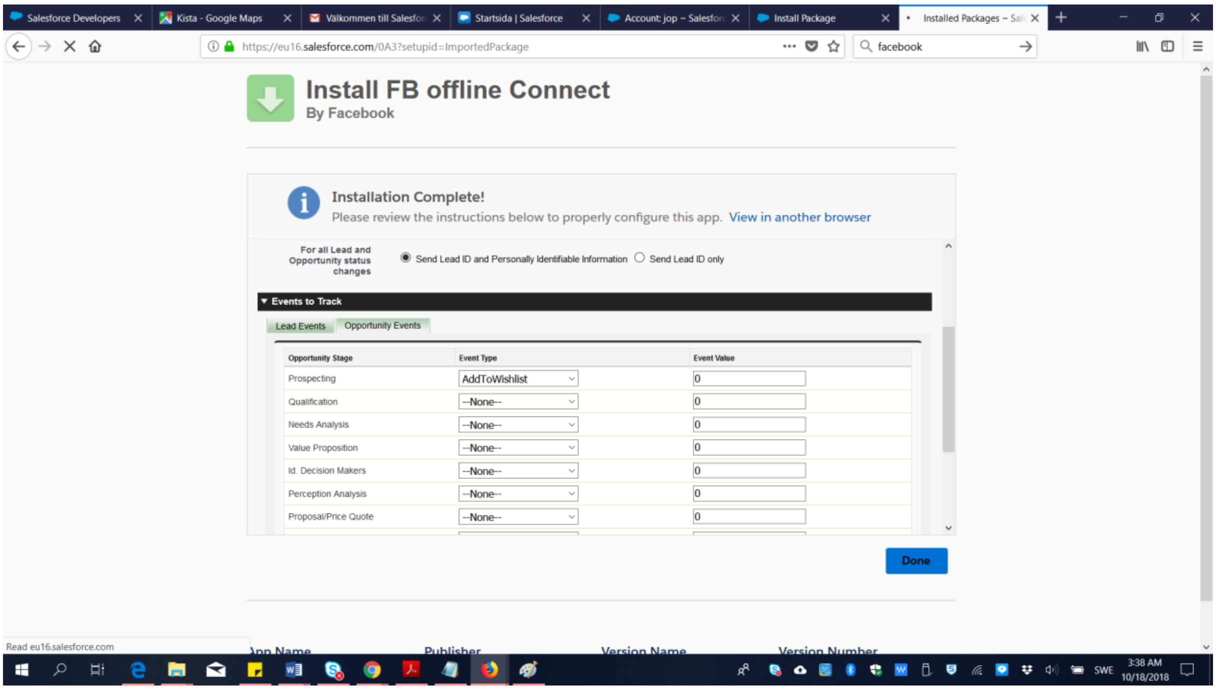
You will be prompted to login


Install FB offline Connect
By Facebook
Install for Admins Only
Install for All Users
Install for Specific Profiles...
Install
Cancel
App Name
FB offline Connect
Publisher
Facebook
Version Name
Winter 2017
Version Number
2.6
Additional Details
View Components


Approve Third-Party Access
This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?
Website
SSL Encrypted
graph.facebook.com
Yes, grant access to these third-party web sites
Continue
Cancel


Install FB offline Connect
By Facebook
Installing and granting access to all Users...
App Name
FB offline Connect
Publisher
Facebook
Version Name
Winter 2017
Version Number
2.6
Additional Details
View Components


Install FB offline Connect
By Facebook
Installation Complete!
Please review the instructions below to properly configure this app. View in another browser
Facebook Setup
Business Manager Id
Sales Cloud Events Configuration
Select data to track
Upload only Facebook events
Upload all events
Select field in Salesforce to map Facebook Lead ID
--None--
For all Lead and Opportunity status changes
Send Lead ID and Personally Identifiable Information
Send Lead ID only
Events to Track
Lead Events
Opportunity Events
Lead Status
Event Type
Event Value
Open - Not Contacted
Done



Congratulation now you have integrated your Salesforce.com with your Facebook page

Invite your friends to like your page in other groups and your friends

If you reach this stage, you know how to integrate applications with Salesforce. You can continue to work on it after the Lab on your own.

6. Assessment

Demonstrate to the teacher how you switch between Force.com and Salesforce.com

Demonstrate that you have enabled developer mode

Demonstrate that you are able to collaborate

Demonstrate that you have created polls

Demonstrate that you have created events

Demonstrate you have imported Accounts

Demonstrate that you have created campaign - Smart GPS

Demonstrate that you are able to create leads and show the lead you created

Demonstrate that you have created a contact with your detail and assigned it with the Dickenson account

Demonstrate that you have created the opportunity from the SL account

Demonstrate that you have created a Case in response to the question that was raised by Mr. Jack Nickelson from SL

Demonstrate that you have integrated your Salesforce.com with Facebook

Extra Tip

- You can download Salesforce1 iOS and Android installed in your salesforce so that you will have no issues accessing and manipulating salesforce1 using your mobile devices.
- Gmail and Google calendar