Salesforce.com Workshop Outline

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Understanding the Vocabulary

- **Account** : an organization, company, or consumer that you want to track (for example, a customer, partner, or competitor).
- **Account team** : a team of users that work together on an account.
- **Bucketing** : a tool in the report builder tool that lets users categorize report records by field, without having to create a formula or custom field.
- **Campaign** : a marketing initiative (i.e., an advertisement, direct mail, conference) that you conduct in order to generate prospects and build brand awareness.
- **Contact** : an individual associated with an account.
- **Forecasts** : projections of sales based on the organization's fiscal year.
- **Lead** : a sales prospect who has expressed interest in your product or company.
- **List View** : a list display of items (for example, accounts or contacts) based on specific criteria.
- **Opportunities:** track your sales and pending deals.
- **Record** : a single instance of a Salesforce object (e.g., John Jones might be the name of a contact record).
- **Report** : returns a set of records that meet certain criteria, organized in 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.
- **Report Builder** : visual editor for reports
- **Report Type** : defines the set of records and fields available to a report based on the relationship between a primary object and its related objects.
- **Task** : workflow and approval actions that are triggered by workflow rules or approval processes.

- **Definitions from the Salesforce Glossary, available here**: https://help.salesforce.com/apex/HTViewHelpDoc?id=glossary.htm&language=en

Accounts and Contacts

- Accounts
    - Adding an account
        - From the **Accounts** tab, click **New.**
        - Required fields are marked with a red bar.
        - Click **Save** when done.
    - Editing an account
        - From the **Accounts** tab, click on the name of an existing account.
        - Click **Edit** to edit account information.
        - Add Contacts, Events, Activities / Tasks, Activity History, Notes & Attachments
- Contacts
    - Adding a contact
        - From the **Contacts** tab, click **New**.
        - Required fields are marked with a red bar.
        - Click **Save** when done.
    - Editing a contact
        - From the **Contacts** tab, click on the name of an existing contact.
        - Click **Edit** to edit the contact information.
        - Add Event Registrations, Academic History, Employement History, Notes & Attachments, Activities / Tasks, Opportunities, Cases, Email Status, Campaign History, and Previous Accounts.
    - Salesforce Documentation:
        - Accounts : https://help.salesforce.com/htviewhelpdoc?id=accounts.htm&siteLang=en_US
    - Salesforce Video tutorials:
        - Merging contacts: http://salesforce.vidyard.com/watch/EUvG4-gLTofRH36J5dZ9MA
        - Using Search to find contacts / accounts / etc.: http://salesforce.vidyard.com/watch/L6lwYMJUyH1n8sKr7KQDaA
        - Merging Accounts: http://salesforce.vidyard.com/watch/QcK0SLnypaQZFEGn9wePnA
        - Tracking Calls, Emails, Meetings: http://salesforce.vidyard.com/watch/Yfv-H8yT7J6_keBGlQa31Q

You may want to **track calls, emails, and meetings** for each Account or Contact: http://salesforce.vidyard.com/watch/Yfv-H8yT7J6_keBGlQa31Q

Searching for a particular contact? Here's some help with using Salesforce's Search feature: http://salesforce.vidyard.com/watch/L6lwYMJUyH1n8sKr7KQDaA

Creating and Using Different Views

- You can create different views on a number of tabs, including Accounts, Contacts, Leads, and Opportunities. Views are a quick way to see subsets of your accounts, contacts, etc., rather than seeing all of them all at once. Salesforce creates some standard views for you automatically, and you can create your own custom views, as well.
  - To check or change your view:
    - On the **Accounts** (or other) tab, notice at the top there is a dropdown menu next to the word "view".
    - Here's where you can select a view, such as All Accounts, My Accounts, New This Week, Recently Viewed Accounts. Click through these different options to see what they show.
  - To create a new view
    - Click on **Create New View** at the top of the page.
    - Give your view a name (that's required!).
    - Specify filter criteria - you can filter by account owner, or by a data field within the account (such as Billing State/Province).
    - Select which fields to display in your view, and the order in which they should appear.
    - When you're ready, click **Save**.
  - To edit or delete an existing view
    - Select the view from the dropdown menu, and then click **Edit** to the right of the dropdown.
    - Here, you can change the filter criteria and fields displayed in your existing view. You can save your changes as a new view, if you'd like.
    - This is also where you have the option to delete a view.
- Salesforce documentation:
    - https://resources.docs.salesforce.com/200/latest/en-us/sfdc/pdf/salesforce_views_cheatsheet.pdf
    - https://help.salesforce.com/htviewhelpdoc?id=customviews.htm&siteLang=en_US

Running Reports

Salesforce lets you run customized reports on your data. You can save reports to run again, share reports with colleagues, and even schedule reports to run at certain times and send you notifications of results.

- Running a saved report:
  - On the Reports tab, you'll see a list of all saved reports to which you have access. To run a report, click on the report title.
  - Make any changes to the report settings. You'll see a sample of the report at the bottom of your screen.
  - Click **Run Report** to run the report.
  - Click **Printable View** to download a printable view of the report.
  - Click **Export Details** to download an Excel or CSV file with your report data.
  - Click **Subscribe** to set up notifications, which notify you whenever certain metrics in the report meet your conditions.
- To create a new report:
  - From the **Reports** tab, click on **New Report**.
  - Select a **Report Type.** Salesforce has a number of standard report types that you can select from, divided by category. Click the small plus sign next to each folder to expand the folder and fine-tune your selection. You'll see a preview of the report on the right of your screen. When you're ready, click **Create**.
  - On the left of your screen, you'll see a list of all of the available fields that you can add to your report. You can apply filters to your report using the top section of the screen, and see a preview of it underneath that.
  - When you're ready, click **Run Report.**
- Salesforce documentation:
  - Understanding the Report Run page: https://help.salesforce.com/htviewhelpdoc?id=additional_report_options.htm&siteLang=en_US
  - The Reports Tab: https://resources.docs.salesforce.com/200/latest/en-us/sfdc/pdf/salesforce_reports_enhanced_reports_tab_tipsheet.pdf
  - Building a Report: https://resources.docs.salesforce.com/200/latest/en-us/sfdc/pdf/salesforce_report_builder_impl_guide.pdf
  - Scheduling Reports: https://resources.docs.salesforce.com/200/latest/en-us/sfdc/pdf/salesforce_reports_schedule_cheatsheet.pdf
- Salesforce Video tutorials:
  - Building a Report: http://salesforce.vidyard.com/watch/-8deIXAgRiNA7zJnyTr_3w
  - Making Reports run Faster: http://salesforce.vidyard.com/watch/PkUBzqWi5TaUSTkmUXPgOA
  - Report Notifications: http://salesforce.vidyard.com/watch/300zYkjGbx3jEbfrTelBrw
  - Scheduling Reports: http://salesforce.vidyard.com/watch/nwimtyjbnNYnMJf7gdtl-g

Creating a Dashboard

You can create a number of dashboards that pull information from existing reports, so you can quickly check the status of multiple projects at once.

- Switching to a different dashboard:
  - Click on the **Dashboard** tab, and select a dashboard from the dropdown menu.
  - Alternately, you can click **Go to Dashboard List.**
  - You'll see a list of all dashboards to which you have access. Click on the title of the dashboard you'd like to see to view it.
- To create a new dashboard:
  - Click on the **Reports** tab, and click the **New Dashboard** button.
  - Use the drag-and-drop creator to select the components of your dashboard and the data sources for each component.
  - You can edit each component by clicking on the wrench icon at the top. You can edit the title, and other text fields around each component as well.
  - Click **Dashboard Properties** to give your dashboard a title and edit component settings.
  - Click **Add Filter** to add a filter to your dashboard.
- Salesforce documentation:
  - Tips for creating dashboards: https://resources.docs.salesforce.com/200/latest/en-us/sfdc/pdf/salesforce_dashboards_cheatsheet.pdf
  - Reports and Dashboards: https://resources.docs.salesforce.com/200/latest/en-us/sfdc/pdf/salesforce_analytics_overview_cheatsheet.pdf
  - Filtering Dashboards: https://resources.docs.salesforce.com/200/latest/en-us/sfdc/pdf/salesforce_dashboard_filters_cheatsheet.pdf
- Salesforce Video tutorials:
  - Creating a Dashboard: https://youtu.be/a6lCrNnotiY
  - Using Reports and Dashboards: http://salesforce.vidyard.com/watch/R3UL6xgV0a2VbLZ1jgztVg
  - Displaying Data with Dashboards: http://salesforce.vidyard.com/watch/bB8whpmu1wtztBThDL9Wzg

Forecasts

Forecasts create fiscal year sales projections based on your company's opportunities. If you are a manager, you can track sales projections for each member of your team, as well. On the Forecasts tab, you can select the Forecast Range to look at, and you'll see various columns showing different projections. Click on a cell to pull up more detail about relevant opportunities at the bottom of your screen. You can also manually edit amounts in the Forecast fields.

- Salesforce documentation:
  - https://help.salesforce.com/HTViewHelpDoc?id=forecasts3_definitions.htm&language=en_US
  - https://help.salesforce.com/HTViewHelpDoc?id=forecasts3_working_with_forecasts.htm&language=en_US
  - https://help.salesforce.com/htviewhelpdoc?id=forecasts3_overview.htm&siteLang=en_US
  - https://help.salesforce.com/HTViewHelpDoc?id=forecasts3_best_practices.htm&language=en_US
  - https://help.salesforce.com/HTViewHelpDoc?id=forecasts3_reports_using.htm&language=en_US
- Salesforce Video Tutorials
  - http://salesforce.vidyard.com/watch/IpgMGIA55Z4DVPuuS0OxEQ

Getting Help

There are a lot of Salesforce help resources available online. On the top right of every page is a **Help for this Page** link – this will take you to Salesforce's online documentation for that particular page.

Additional Help Resources:

- **Glossary**: https://help.salesforce.com/HTViewHelpDoc?id=glossary.htm&language=
- **Downloadable User Guides**: https://help.salesforce.com/HTViewHelpDoc?id=getstart_help.htm&language=
- **Full Salesforce User Guide:** https://resources.docs.salesforce.com/200/latest/en-us/sfdc/pdf/sf.pdf
- **Tip Sheets and Implementation Guides:** https://help.salesforce.com/HTViewHelpDoc?id=quicktour_tips.htm&language=en_US#quicktour_tips
- **Salesforce Video Guides:** https://help.salesforce.com/HTViewHelpDoc?id=quicktour_videos.htm&language=en_US
- **Salesforce on YouTube:** https://www.youtube.com/user/salesforce/featured
    - **How-to Videos on YouTube:** https://www.youtube.com/user/salesforce/playlists?view=50&sort=dd&shelf_id=15