

Salesforce Fast Start/ Back to Basics

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Housekeeping

- Fire Alarm procedure
- Facilities
- Course length
- Feedback forms
- Questions during and after
- Workshop based approach

About Third Sector IT

- We provide Salesforce implementation, training and support
- Training can be classroom based, on-site and/or bespoke
- Training available as individual 'seats', as part of a support contract, or as a bulk discount

Introduction

- Please introduce yourself
- Salesforce experience (if any)
- Specific goal you have for today, such as
 - I want to know more about...
 - I'd like to be more confident using...
 - How do I...
 - What is Salesforce?!?

Applicability

- Not everyone's Salesforce org is the same
- 98% of what you learn today will be relevant to your unique customisations
- If you're a Non-Profit or Charity
 - Accounts = Organisations
 - Opportunities = Donations/ Grants

Course Goals

- Answer the question ‘What is Salesforce?’
- Log-in to and navigate Salesforce.com
- Understand standard objects
- Create and edit records
- Use views to segment data
- Get social with Chatter

What is Salesforce?

- Relational database
- Customer Relationship Management (CRM) system
- Cloud based
- Built in social features – Chatter
- Add functionality using apps

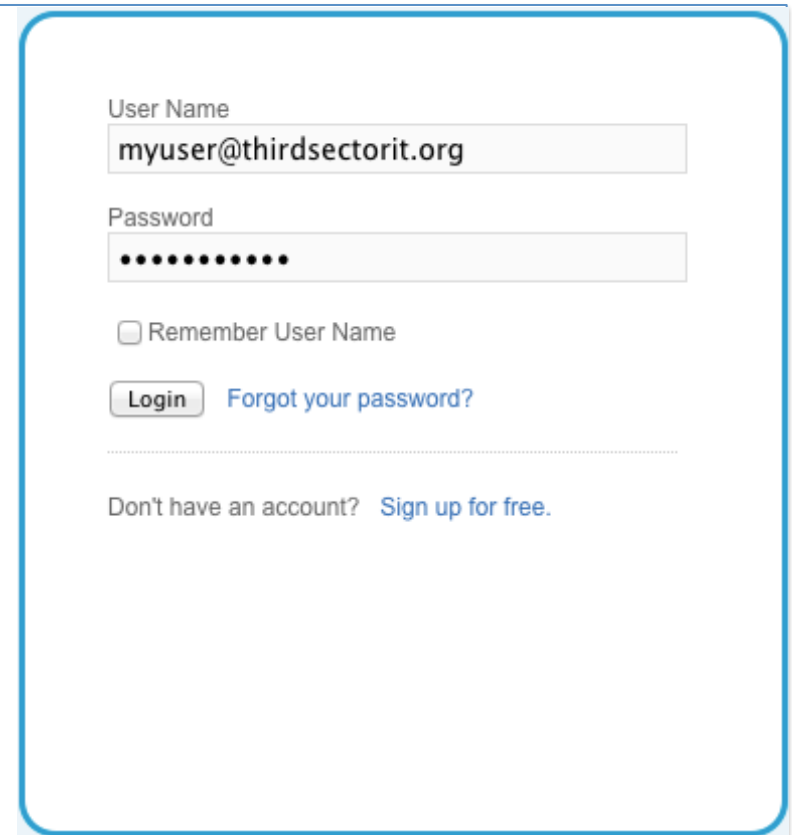
Logging in to Salesforce

- Any common browser
 - Firefox, Internet Explorer, Chrome, Safari
 - You can also access it on iPhone, Android, BlackBerry, iPad...
- I can log in from anywhere?
 - Yes! If you can browse the web, you can log in
 - Can be restricted to certain times and/or certain locations

Exercise

Let's log-in!

- Using a training database – you can't break it!
1. Navigate to `login.salesforce.com`
 2. Log-in using Username/ password on handout

A screenshot of a web login form for Salesforce. It features two input fields: 'User Name' with the text 'myuser@thirdsectorit.org' and 'Password' with masked characters. Below the password field is a checkbox labeled 'Remember User Name'. There are two buttons: a grey 'Login' button and a blue 'Forgot your password?' link. At the bottom, there is a link that says 'Don't have an account? Sign up for free.'

User Name
myuser@thirdsectorit.org

Password
.....

☐ Remember User Name

[Forgot your password?](#)

Don't have an account? [Sign up for free.](#)



Home Page

salesforce12

Search Leads, Accounts, C...
Options...

Search

Global Search

Third Sector IT ... ▾

Help & Training

Subscribe Now!

Sales ▾

Home

Chatter

Files

Leads

Accounts

Contacts

Opportunities

Reports

Dashboards

Products

Forecasts

+

Create New... ▾

Recent Items

Third Sector IT Training

Ben Jackson

Blue Box Corp - 30 Whatsits

Blue Box Corp

Air Vents Unlimited

Custom Sidebar

Open Opportunities, grouped by Stage

Messages and Alerts

Recycle Bin

Third Sector IT Training

Just getting started with training event! 1 minute ago Clear

Saturday 26 May 2012

Hide Chatter

What are you working on?

Attach File Link

Share

Sort by: Post Date ▾

Third Sector IT Training

Just getting started with training event!

Today at 21:55 · Comment · Like · Share ▾

Recommendations

More

Complete your profile

Tell everyone about yourself and upload a photo.

Skip >

Bill Lumberg

Shares interest in a record

+ Follow

Dashboard

Refresh

Customize Page

Last refreshed at 30/04/2012 13:16. Displaying data as Bill Lumberg.

Opportunity Name	Amount
Peri Productions Ltd - 90 Widgets	£9,970
Blue Box Corp - 0 Things	£9,950
Chameleon Circuits Co - 10 Widgets	£9,880
Chameleon Circuits Co - 0 Widgets	£9,810
Blue Box Corp - 50 Things	£9,800

Record Count

0 8 16 24

22

Sum of Expected Revenue (Thousands)

£26.55

£41.34

£29.52

£42.51

£61.85

£50.91

£93.76

£74.48

£8.51

Tab Home Page

Accounts

Contacts

Opportunities

Campaigns

Reports

Dashboards

Products

Forecasts



Accounts

Home

View: All Accounts



Go!

[Edit | Create New View](#)

View Menu

Recent Accounts

New

New Record Button

Account Name

Blue Box Corp

Recent Records

Billing City

London

Reports

[Active Accounts](#)

[Accounts with last activity > 30 days](#)

[Account Owners](#)

[Contact Role Report](#)

[Account History Report](#)

[Partner Accounts](#)

[Bounced Person Accounts and Contacts](#)

[Go to Reports »](#)

Tools

[Import My Business Accounts & Busi](#)

[Import My Organization's Business A](#)

[Import My Organization's Person Acc](#)

[Mass Delete Accounts](#)

[Transfer Accounts](#)

[Merge Accounts](#)


[Mass Email Contacts](#)

[Mass Stay-in-Touch](#)

[Mass Add Contacts to A campaign](#)

[Sales Methodologies](#)

Record Detail Page



Search Leads, Accounts, C...
Options...

Search


Third Sector IT ... ▾

Help & Training

Sales ▾

Subscribe Now!

Home Chatter Files Leads **Accounts** Contacts Opportunities Reports Dashboards Products Forecasts +



Blue Box Corp

Record

Customize Page | Edit Layout | Printable View | Help for this Page ?

Show Chatter + Follow


« Back to List: Development Package

Contacts [3] | Open Activities [0] | Activity History [0] | Opportunities [5+] | Cases [0] | Partners [0] | Notes & Attachments [0]

Account Detail

Edit Delete Sharing

Buttons

Account Owner  Third Sector IT Training [Change]

Phone 0161 222 120

Account Name Blue Box Corp [View Hierarchy]

Fax

Parent Account

Website <http://www.bluebox.null>

County Borsetshire

Ticker Symbol

Fields

Contacts

New Contact Merge Contacts

Contacts Help ?

Related Lists

Action	Contact Name	Title	Email	Phone
Edit Del	Dorothea Chaplet		dorothea@bluebox.null	0161 222 123
Edit Del	Ben Jackson		ben@bluebox.null	0161 222 125
Edit Del	Polly Wright		polly@bluebox.null	0161 222 124

Open Activities

New Task New Event

Open Activities Help ?

No records to display

Activity History

Log A Call Mail Merge Send An Email

Activity History Help ?

Global Search

- Searches your whole database
- Pin objects you use most
- Use 'wildcards'
 - * can be anything
 - ? is ONE of anything



Exercise


Navigate Salesforce

1. Find the Account 'Blue Box Corp'
2. How many related Contacts does it have?
3. What is Liz Shaw's mobile number?
4. How many Opportunities is Liz associated with?
5. Name two ways of getting back to the 'Blue Box Corp' Account record

Starting with What You Know

- Let's look at how Salesforce compares to a system you might have used before

Salesforce - List of Contacts

<div>New Contact Map Contacts </div>					
<input type="checkbox"/>	Action	First Name	Last Name ↑	Phone	Mobile
<input type="checkbox"/>	Edit Del +	Peri	Brown	020 122 1221	0708 923 840
<input type="checkbox"/>	Edit Del +	Mel	Bush	020 122 8650	0709 972 128
<input type="checkbox"/>	Edit Del +	Stephen	Bush	2345678	
<input type="checkbox"/>	Edit Del +	Dorothea	Chaplet	0161 222 123	0704 321 954
<input type="checkbox"/>	Edit Del +	Ian	Chesterton	020 722 8124	
<input type="checkbox"/>	Edit Del +	Susan	Foreman	020 722 8123	0701 100 123
<input type="checkbox"/>	Edit Del +	Jo	Grant	020 822 2333	0704 983 195
<input type="checkbox"/>	Edit Del +	Zoe	Hariat	0161 223 600	0701 349 887
<input type="checkbox"/>	Edit Del +	Ben	Jackson	0161 222 125	0705 892 341
<input type="checkbox"/>	Edit Del +	Tegan	Jovanka	020 332 7201	0702 239 876
<input type="checkbox"/>	Edit Del +	Alister Gordon	Lethbridge-Stewart	0121 100 170	0702 233 338
<input type="checkbox"/>	Edit Del +	Jamie	McCrimmon	0161 223 599	0705 879 419

Database (Excel)

	B	C	D	E
1	FIRSTNAME	LASTNAME	BUSINESS PHONE	MOBILEPHONE
2	Susan	Foreman	020 722 8123	0701 100 123
3	Ian	Chesterton	020 722 8124	
4	Barbara	Wright	020 722 8125	0702 123 534
5	Vicki	Pallister	020 722 8126	0707 665 454
6	Steven	Taylor	020 722 8127	0706 324 324
7	Dorothea	Chaplet	0161 222 123	0704 321 954
8	Polly	Wright	0161 222 124	
9	Ben	Jackson	0161 222 125	0705 892 341
10	Jamie	McCrimmon	0161 223 599	0705 879 419
11	Zoe	Hariot	0161 223 600	0701 349 887
12	Victoria	Waterfield	0161 223 601	
13	Liz	Shaw	0121 100 169	0701 232 879
14	Alister Gordon	Lethbridge-Stewart	0121 100 170	0702 233 338

Records

	B	C	D	E
1	FIRSTNAME	LASTNAME	BUSINESS PHONE	MOBILEPHONE
2	Susan	Foreman	020 722 8123	0701 100 123
3	Ian	Chesterton	020 722 8124	
4	Barbara	Wright	020 722 8125	0702 123 534
5	Vicki	Pallister	020 722 8126	0707 665 454
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12	Victoria	Waterfield	0161 223 601	
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Fields

	B	C	D	E
1	FIRSTNAME	LASTNAME	BUSINESS PHONE	MOBILEPHONE
2	Susan	Foreman	020 722 8123	0701 100 123
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12	Victoria	Waterfield	0161 223 601	
13	Liz	Shaw	0121 100 169	0701 232 879
14	Alister Gordon		0121 100 170	0702 233 338

Exercise

Spot the Data Issues

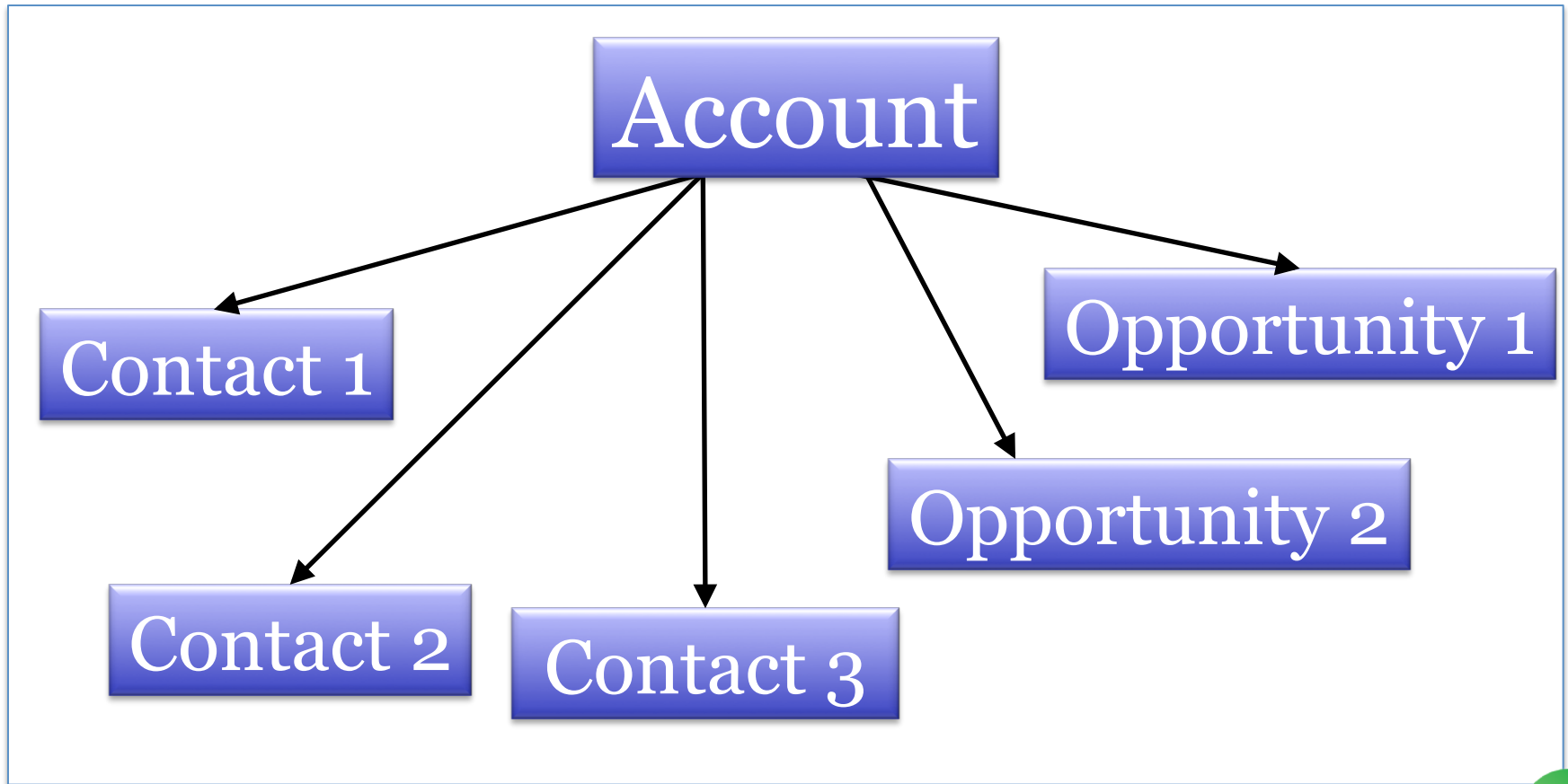
	A	B	C	D
1	Account	Contact	Opportunity	Likelihood
2	Heat and Light Co	Fred Smith	Light bulbs (60W)	10%
3	Heat and Light Co	F. Smith	Light bulbs (40W)	20
4	Heat & Light Co	Frederick Smith	Kettle (3kW)	30%
5	Heat and Light Co.	Fred Smythe	LED Light Bulb (5W)	90%
6	Heat and Fight Co	Jane Doe	LED Light Bulbs (5W)	80%
7	H & L Company	Janet Doe	L.E.D. Light Bulb (5W)	61%
8	H & L Co.	Jane Do	Kettle (3k.W.)	10%

- Work with the person sitting next you to spot at least 3 problems (there are 15!)

Standard Objects

- Salesforce comes with a number of ‘standard objects’
- Think of each object as its own container of data
 - Accounts
 - Contacts
 - Opportunities
 - Leads

Salesforce Structure



Accounts

- Any company/ organisation you have a relationship with
 - Customers
 - Partners
 - Working groups/ NGOs/ Local Authorities etc
- A collection of people
- Accounts are central to using Salesforce

Creating Records

- Click 'New' button on object home page
 - Red line means field is compulsory
 - Magnifying glass is a 'Look up'
 - Picklists
- Don't forget to Save!



Exercise

Create an Account

1. Click 'New' button on the Accounts home page
2. Fill in the following fields:
 - I. Account Name
 - II. Phone
 - III. Website
 - IV. Industry
 - V. Billing Address

Editing Records

- Edit whole record using edit page
 - Click 'Edit' button on Record Page
- Edit individual fields on record detail page
 - Double click each field
 - Press enter twice
- Edit records en masse using Views



Exercise

Edit Your Account

1. Edit the Account you just created. Use the edit page for the following fields:
 - I. Phone
 - II. Industry
2. Edit the fields below by double clicking them on the record detail page:
 - I. Address
 - II. Website

Contacts

- Anyone with a pulse!
 - Employees of your Accounts
 - Volunteers
 - Donors
 - Grantees



Exercise

Create Contacts

1. Create a Contact by clicking the 'New' button on the Contacts home page
2. Find the Account you created earlier. Create another Contact by clicking the 'New' button on the Contacts related list
3. How does this make a difference?

Opportunities

- Any income generating activity
 - Sales
 - Donations
 - Grants are the opposite but still work!
- Income can be potential, 'Won' or 'Lost'
- Use Stages to manage your process
- Can be used to forecast future income



Exercise

Create Opportunities

1. Find the Account you created earlier.
Create an Opportunity by clicking the Opportunities related list 'New' button
2. Find the Contact you created earlier.
Create an Opportunity by clicking the Opportunities related list 'New' button
3. What difference does this make?

Activities

- Used to record interactions with customers
- Open Activities
 - Schedule future tasks and events
 - ‘New Task’
- Activity History
 - Log details of completed Activities
 - ‘Log a Call’



Exercise

Create Activities

1. Create a 'New Task' against the Contact you created earlier
2. 'Log a Call' against the Opportunity you created earlier
3. Find the associated Account. Where do you see the Activities?
4. 'Complete' the scheduled task. What happens to it?

Leads

- Someone who may be interested in your organisations products/ services
 - Potential sales
 - Potential donors/ volunteers/ grantees
- Leads can come from
 - Web-to-Lead form
 - A list you bought
 - A stack of business cards



Exercise

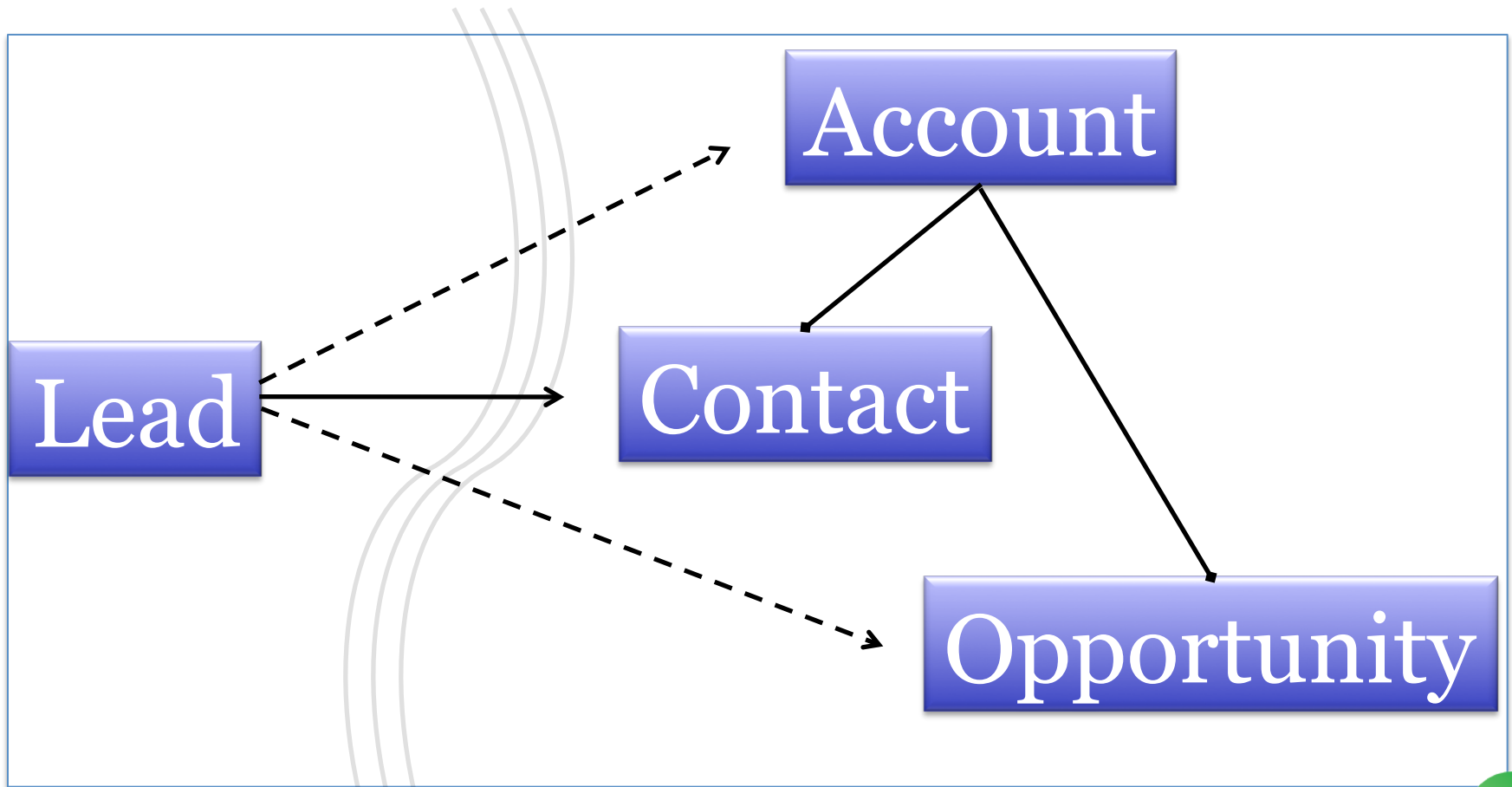
Create a Lead

1. Click 'New' button on Lead home page
2. Fill in the following fields:
 - I. Company
 - II. Name
 - III. Phone
 - IV. Email
 - V. Address
 - VI. Lead Source

Lead Conversion

- When a Lead has been 'qualified' it is converted to
 - Account
 - Contact
 - Opportunity (optional)
- Get organisation wide agreement on
 - What is a Lead and what is a Account/ Contact
 - When a Lead should be converted

Lead Conversion Diagram



Can't unconvert a Lead



Exercise

Convert Your Lead

1. Click 'Convert' button
2. Select 'Create New Account'
3. Enter something useful for the Opportunity Name
4. Converted Status = 'Qualified'
5. Use Global Search to find your Lead. Where is it?

Views

- Great for segmenting data and creating useful lists
- Accessed through tab home pages
- A number of Views exist by default
- Order/ sort data
- Inline editing to update multiple records
- Creating custom views covered in Intro to Reporting



Exercise

Run a View

1. Run the Opportunities Closing This Month View
2. How many records are returned?
3. What is the largest Opportunity Amount?
4. What is the total value of Opportunities?

View Limitations

- Cannot span multiple objects (i.e. no Contact & Account data in same view)
- No grouping or numerical analysis (i.e. no Sum or Average)
- Maximum of 2000 records
- Cannot export from a view

Chatter

- Social media for your Salesforce org
- Posts have 'record context'
- 'Follow' records and people you care about
- Use @ to directly message people
- Allow users to collaborate with groups and file sharing



Exercise

Use Chatter

1. Follow the Account record created by the person sitting next to you
2. Find the Account record you created and post something in the Chatter feed
3. @ your neighbor (using their training login name)
4. Check the Chatter tab. What do you see?

Further Help and Support

- Salesforce Help & Training link



- Third Sector IT website

<http://thirdsectorit.org/salesforce-training-london-uk/free-salesforce-training/>

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- Go to Training > Training Resources, and download this and other presentations

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- Please fill in a feedback form
 - Link is in the training org home page sidebar

Thank You!

- Any questions?