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

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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 or a support contract, or as a bulk discount

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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?!?

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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

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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

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What is Salesforce?

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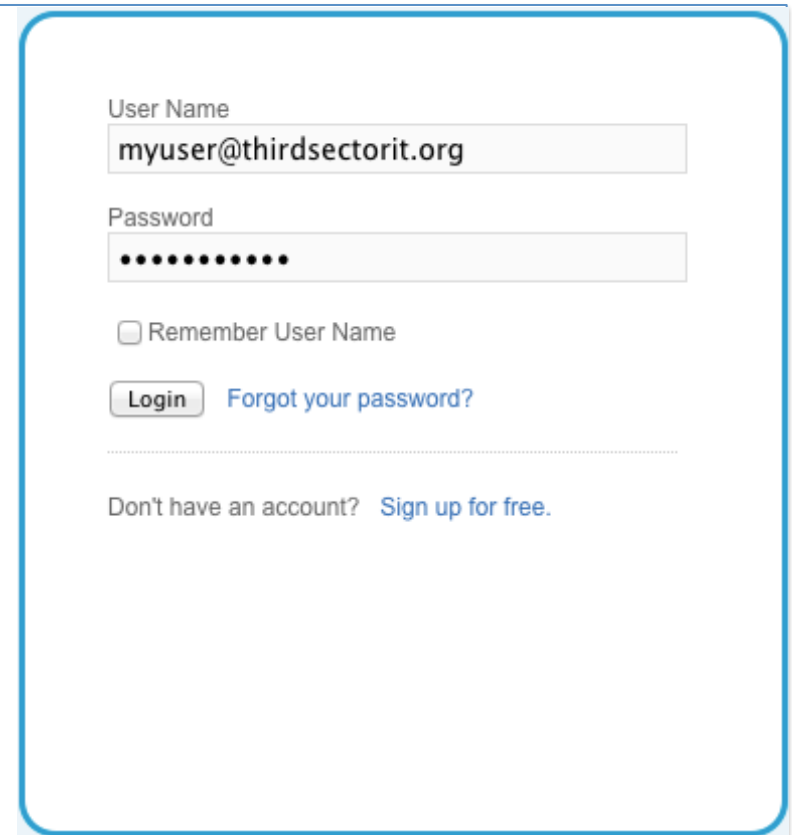
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Logging in to Salesforce

- 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

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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

User Name
myuser@thirdsectorit.org

Password
•••••••••

☐ Remember User Name

Login   Forgot your password?

Don't have an account?   Sign up for free.

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Home Page

Labels on the screenshot:
- Tabs
- Global Search
- Application Picklist
- Chatter
- Sidebar

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		Billing City
Blue Box Corp	Recent Records	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

Global Search

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

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

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Starting with What You Know

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

Salesforce - List of Contacts

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

New Contact | **Map Contacts**

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

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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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14	Alister Gordon	Lethbridge-Stewart	0121 100 170	0702 233 338

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Fields

	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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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!)

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Standard Objects

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

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Salesforce Structure
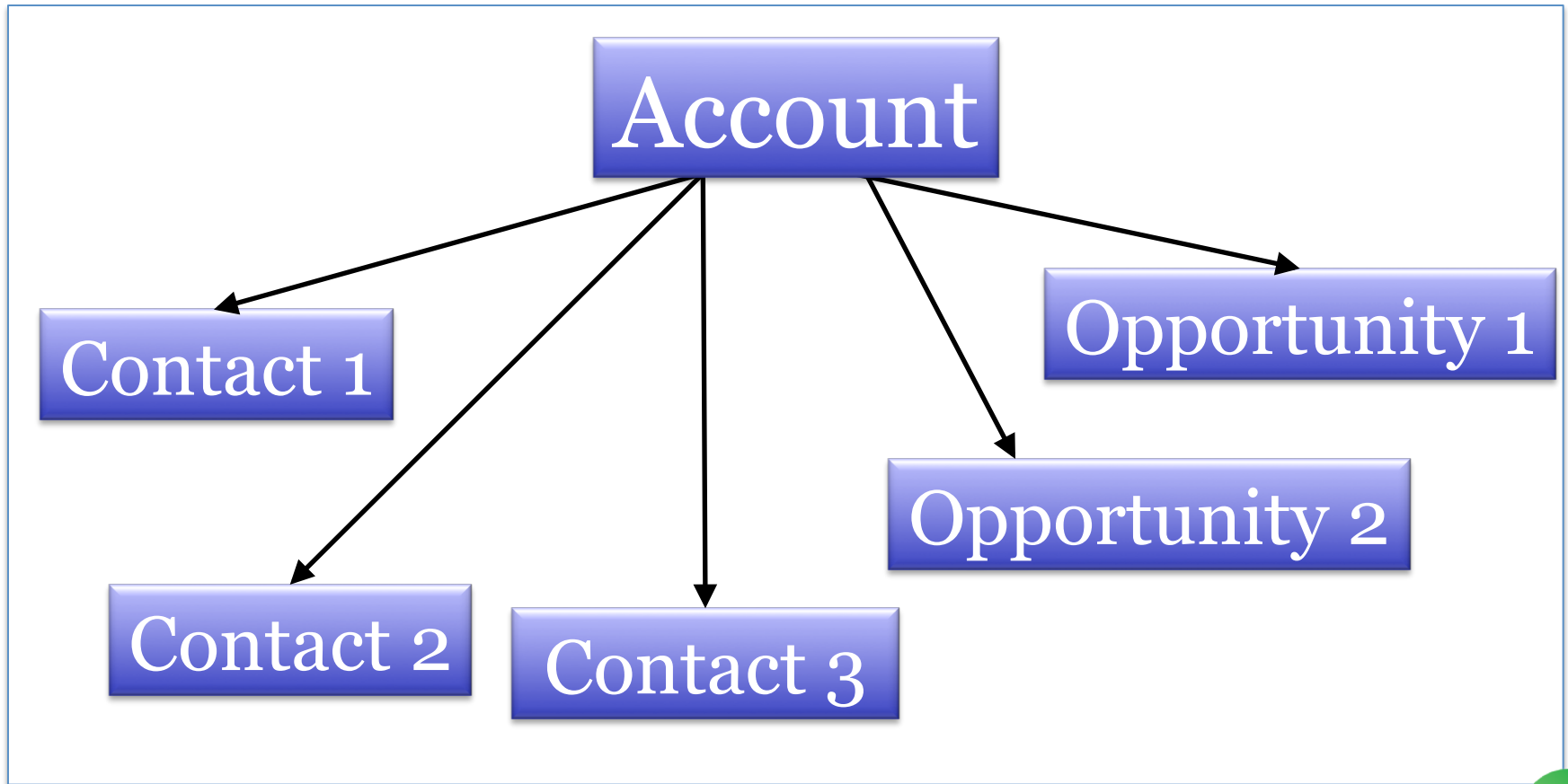
Accounts

- 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

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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!

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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

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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

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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

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Contacts

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

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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?

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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

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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?

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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'

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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?

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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

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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

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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

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Lead Conversion Diagram
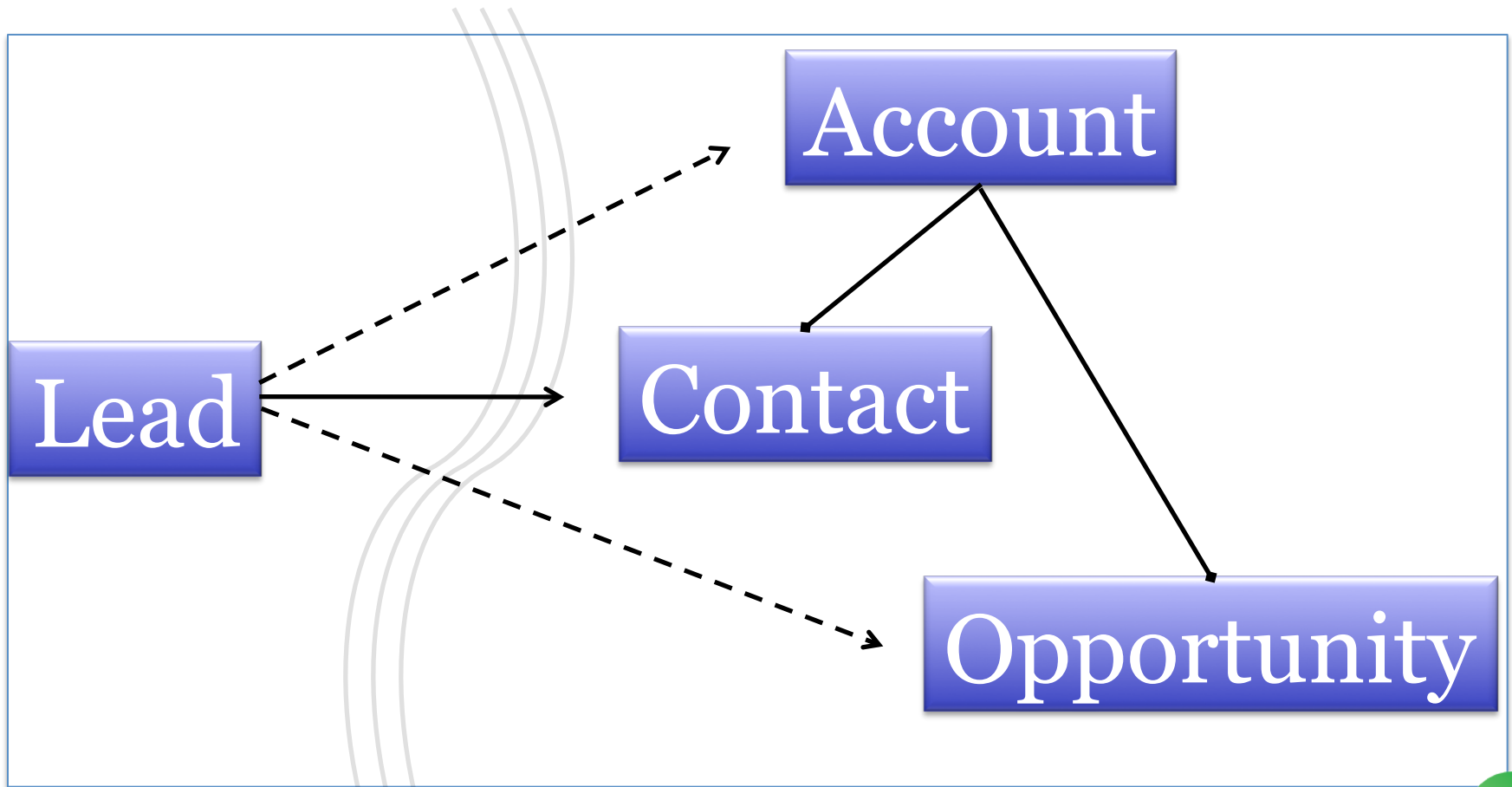
Can't unconvert a Lead

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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?

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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

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?

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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

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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?

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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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This Slide Deck

- A copy of this presentation can be found on our website

- Go to thirdsectorit.org

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

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Training Survey

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

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Thank You!

- Any questions?

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