QUICK REFERENCE GUIDE

Salesforce Selling Advantage

Salesforce Sales Process: Capture, Connect, Qualify, and Close

Lead

- Leads are created manually, imported or added automatically from web forms
- Leads are assigned by Sales Operations
- Leads follow a **Qualification** process

Account & Contact

- Leads are **converted** to Accounts, Contacts, and optional Opportunities
- Contacts are **direct to one Account** and can be **related** to many Accounts

Opportunity

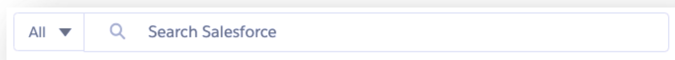
- Opportunities are related to one Account
- Contact Roles identify people involved
- Follow the Sales Path to close the Opportunity with a **Sales Process**

Sales Records in Salesforce

Salesforce Selling Advantage

Use Global Search to locate an Individual Record

a. Enter Name in **Search** box
b. Find the record in the search results
c. Click the **Record Name**
d. Click **View More** for search filters

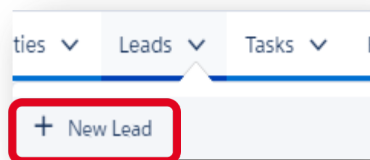


Global Search Tips

Operator	Definition
*	Match one or more characters at the middle or end (not beginning) of your search term (e.g. AM* will return AMEX, American Express)
?	Match only one character in the middle (not beginning or end) of your search term (e.g. Mart?n will return Martin, Marten, Martyn)

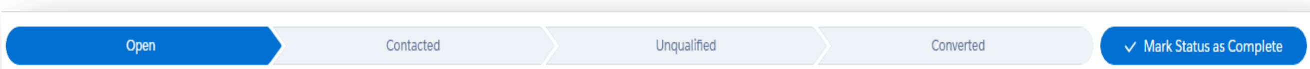
Add a new Lead

a. Click the arrow in the **Leads** navigation item
b. Click **New Lead**
c. Enter the Lead information
d. Click **Save**



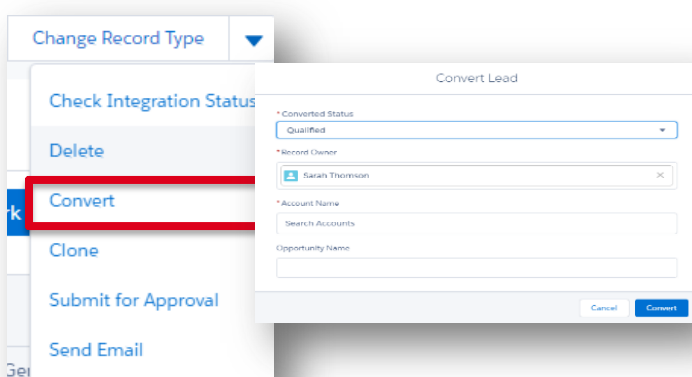
Update the Lead Status

a. Update the **Lead Status** using the Sales Path.
b. Click **Mark Status as Complete**



View and & Convert Leads

a. Click the **Leads** navigation item
b. Select "**My Open Leads**" List view
c. Click the **Name** of Lead
d. Click **Convert** from the menu
e. Click into **Account Name** and select the Account, or create a new Account
f. Adjust the **Opportunity Name**
g. Click **Convert**



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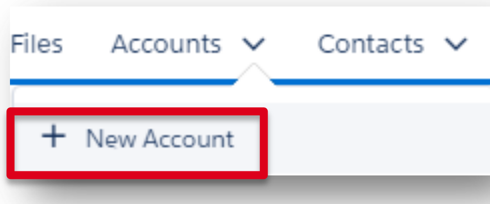
Add an Account

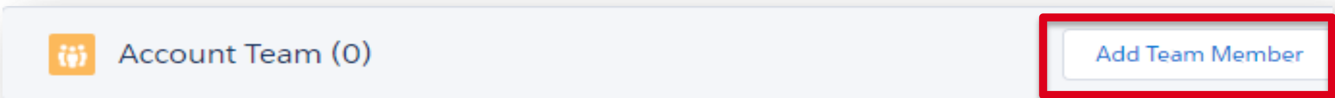
a. Click the arrow in the **Accounts** tab
b. Click **New Account**
c. Enter the Account information
d. Click **Save**



Add Account Team Members*

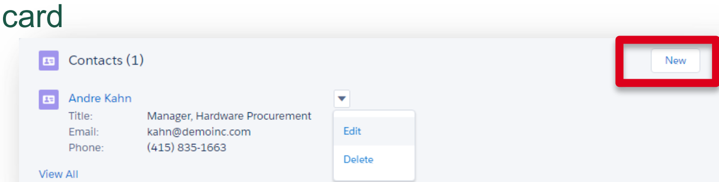
(*Not Available in the Essentials Edition)

a. Navigate to the **Account Team** related list
b. Click **New Member**
c. Choose a **Team Role**
d. Select the level of access users will have to the Account and related records
e. Click **Save**



Add a Contact from Within the Account Record

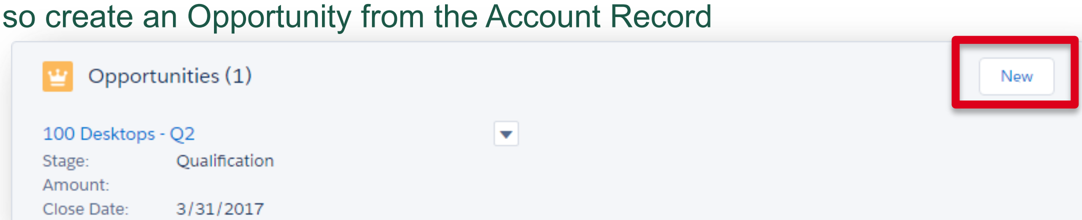
a. From the Account record, click on the **Related** tab
b. Click **New** on the Contacts related list card
c. Enter the details for the Contact
d. Click **Save**



Create an Opportunity from Within the Contact Record

a. Navigate to the Contact record to create the New Opportunity
b. Click on the **Related** tab
c. Click **New** on the Opportunities related list card
d. Enter the details for the Opportunity
e. Click **Save**

Note: You can also create an Opportunity from the Account Record



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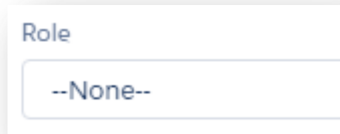
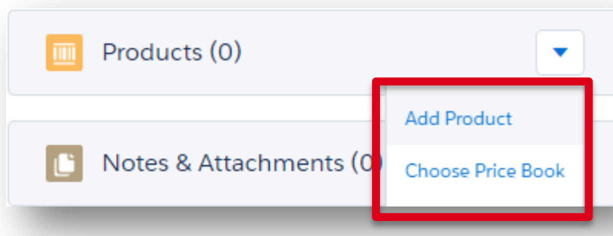
Add a Contact Role

a. Enter the **Role** for the associated Contact
b. Click **Save**



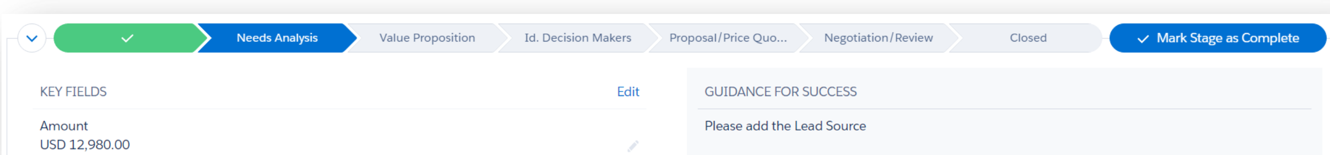
Add Opportunity Products * (*Not Available in the Essentials Edition)

a. Navigate to the **Products** related list card
b. Click the arrow and **Add Product**
c. Click into **Search Products** and enter a Product Name
d. Click + next to the Product(s) in the search results
e. Click **Next**
f. Enter the **Quantity** and **Sales Price**
g. Click **Save**



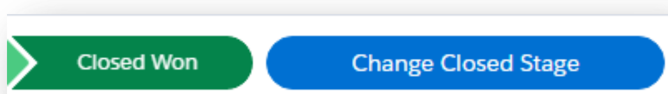
Update Opportunities

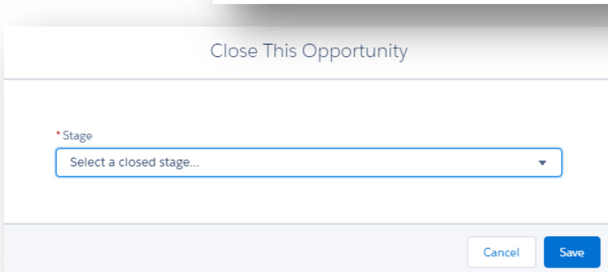
a. From the Opportunity, click **Edit** in the key fields in the Sales Path to update the relevant fields
b. Click on **Mark the Stage as Complete** in the Sales Path



Closing Opportunities

a. Click on **Closed** in the Sales Path
b. Click **Select Closed Stage**
c. Select a closed Stage
d. Click **Save**.





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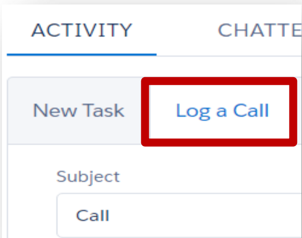
Log a Call

a. Navigate to the relevant record
b. Click on the **Activity** tab
c. Click **Log a Call**

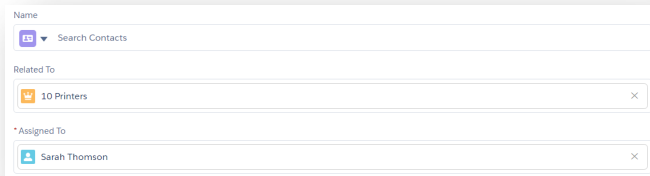


d. Enter the Activity details
   i. Subject
   ii. Comments
e. Click **Save**

Note: Make the Subject DESCRIPTIVE to remind you of the action taken.

Create a Task

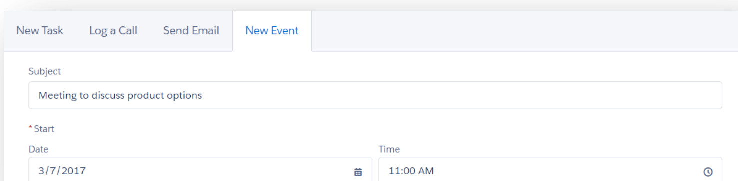
a. Navigate to the relevant record
b. Click on the **Activity** tab
c. Click **New Task**



a. Enter the Activity details
b. Use the **Name** and **Related To** fields to associate the Task with the relevant records
c. *(Optional)* To assign a Task to a colleague, click **X** in the **Assigned To** field to remove your name, and search for your colleague's name
d. Click **Save**

Create an Event

a. Navigate to the relevant record
b. Click on the **Activity** tab
c. Click **New Event**
d. Enter the Activity details
e. Click **Save**



Help & Support

Send Email To: Support@SalesAndTechnology.com
Format Subject line: **"Salesforce: {Nature of Request}"**
Include Your Direct Phone Number and best time to call.

