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**Tom Wong**  
**Liz Kao**  
**Matt Kaufman**



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**by Tom Wong, Liz Kao, and Matt Kaufman**



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# About the Authors

**Tom Wong** claims he is the Number 1 fan of Salesforce. He keeps a picture of the Web site on his desktop and a Team Edition football in his car. He sends his wife Salesforce meeting invitations. His friends say he can't talk about anything else.

Prior to writing the first edition, Tom was vice president in charge of CRM solutions for Theikos, a leading salesforce.com partner. And before then, he held several senior management positions at Gomez, another satisfied salesforce.com customer. He is a certified salesforce.com partner and has been involved in more than 30 implementations impacting thousands of users.

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## *Dedications*

To my friends and family. Without their patience, support, encouragement, sense of humor, and supply of snacks, I wouldn't be writing this sentence today.

Liz

To Michelle, Noah, and Abigail. Thank you for putting up with all the late nights and trips away from home; your love is what keeps me going.

Matt

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# Introduction

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**S**alesforce.com *For Dummies*, 4th Edition, is for users of Salesforce, including those users who have the Unlimited, Enterprise, Professional, Group, Contact Manager, or Personal edition. It's for Salesforce users who want to quickly know how to use this browser-based application for sales and customer service, all running "in the cloud," which used to be called software-as-a-service (SaaS), just so you're up to date on your enterprise application-speak. Don't look in this book to find out how Salesforce works. Use this book to find out how you can manage your customers and your teams and close more business by using Salesforce.

- ✔ **If you're a sales rep**, this book can help you use Salesforce to manage your leads, accounts, contacts, and opportunities. Spend less time doing administrative work and more time focused on making money.
- ✔ **If you're a sales manager**, find out how to use Salesforce to track team activities, shorten the ramp-up time on new hires, and pinpoint key deals that require your involvement.
- ✔ **If you're in channel sales**, we show you how to track your relationships with companies that are — or will be — your partners and all the deals they work for you.
- ✔ **If you're a partner**, we show you the world of Salesforce and how you can improve your deal pipeline and win rate with your vendor.
- ✔ **If you're in marketing**, you see how to use Salesforce to make an immediate and measurable impact on your sales organization. We cover how to manage campaigns, track leads, measure return on investment (ROI), and monitor your Google AdWords marketing campaigns.
- ✔ **If you're in customer service**, we show you how to manage customer issues, from creation to resolution. Support managers will see how to improve team productivity and customer self-sufficiency.
- ✔ **If you sit on the executive team**, this book shows you how to use Salesforce for internal collaboration and to measure your overall business.
- ✔ **If you're an administrator or involved in your company's customer relationship management (CRM) initiative**, this book gives you practical knowledge for customizing, configuring, maintaining, and successfully implementing your solution. To start, we suggest you flip through the sales, marketing, and support chapters in Parts III, IV, and V to understand how Salesforce is commonly used by end users. Then use that to guide you in administering Salesforce in Parts VI and VII.



Although this book applies to users of all Salesforce editions, be aware that not all portions of this book necessarily apply to your edition. Different editions have varying degrees of features and functionality. We make sure to point out the differences where relevant.

## Updates to the Fourth Edition

This book, its fourth edition, has been revised to reflect the latest salesforce.com product and feature offerings as of the Summer 2010 release. Salesforce is an Internet-based service where new releases occur simultaneously for all customers, without your having to lift a finger (okay, except to just log in). Because of this model, salesforce.com can more quickly release several versions of its product than many traditional software vendors — and us! We did our best to update this book to the current version of the product, but please bear in mind that new versions of Salesforce are always in the works.

References to the product use the word *Salesforce*, and references to the company that makes the family of products, or the family of products as a whole, use the phrase *salesforce.com*. That's a little detail, but we didn't want you to think our eagle eyes had glossed over that.

Here's a bare outline of the parts of this book:

- ✔ **Part I: Salesforce Basics:** Part I gives you the big picture on Salesforce. We show you the best ways to navigate the system, where to go for help, and how to personalize Salesforce.
- ✔ **Part II: Keeping Track of Customer Relationships:** Part II shows you how to use Salesforce for the most common facets of your sales and support processes. We also discuss the specifics of what Chatter is and how to set it up — Chatter uses social media behavior (similar to Facebook and Twitter) and associates it with business interactions and internal communications to help sales, marketing, and support departments do their jobs better. We explain how you can use Salesforce for managing your existing business relationships, as well as those with key prospects.
- ✔ **Part III: Driving Sales with Sales Cloud:** Part III shows sales organizations how to use Salesforce to track sales, from lead to close, and everything in between. We also introduce the concept of generating quotes for those of you selling varied products and services (who doesn't?). We also discuss how channel managers and partners can use Salesforce to work together to bring in more channel revenue.
- ✔ **Part IV: Optimizing Marketing with Sales Cloud:** If you're in marketing, Part IV is your friend. Marketing in Salesforce and your business is much

more than campaign management. You discover how to use Salesforce with Google AdWords to manage your Internet marketing campaigns, and we also discuss how to organize your sales collateral.

- ✔ **Part V: Delighting Customers with Service Cloud:** Part V shows customer service agents and managers how to use Service Cloud (formerly Salesforce Service & Support) to more efficiently manage the customer issue lifecycle. Agents see how to create, track, and resolve cases in Salesforce. Customer service managers will garner ways to increase their teams' efficiencies by increasing the quality of service while decreasing case resolution time.
- ✔ **Part VI: Measuring Overall Business Performance:** Part VI shows every rep, manager, and senior executive how to use Salesforce to measure and analyze their business. This book doesn't tell you how to improve your business (that's largely up to you), but Part VI helps you place the data at your fingertips.
- ✔ **Part VII: Designing the Solution with Force.com:** Salesforce is great out of the box, but you can get more out of it when you customize it to meet your corporate objectives. Part VII is for system administrators and the CRM project team. You get to know the important steps for configuring and maintaining your system, as well as your options if you want to roll up your sleeves and do some more advanced customizations.
- ✔ **Part VIII: The Part of Tens:** In Part VIII, we give you lists that are guaranteed to catch your attention. Here, we review the best-but-sometimes-overlooked productivity tools. We also summarize some best practices for successfully implementing Salesforce.

We show you everything you need to know to manage the lifecycle of your customer relationships in Salesforce from qualifying leads to closing opportunities to handling service agent inquiries. Along the way, you have a laugh or two. And this book can expose you to useful features and functionality that you might not have even known existed.

## *How to Use This Book*

This book is divided into parts and then chapters based loosely on three widely accepted pillars of customer relationship management: sales, marketing, and customer service. We organized the sections based on your function in the company and what you might want to know about Salesforce based on your role.

You can choose to read this book from front to back (although there's no surprise ending in the last chapter). Or, you can use this book as a reference,

similar to other *For Dummies* books. You can go to any topic in this book and know what to do with minimal leafing to other sections.

You can get the most out of this book if you're using it while you're logged in to Salesforce (and sitting on your favorite chair). The best way to know what to do, in our experience, is by doing it, and for that you need the salesforce.com Web site open, revved, and raring to go.

In this book, we provide you the easiest or best way to perform a task in Salesforce. Like other easy-to-use applications, the method shown might not be the only way, and sometimes you might find another method that works better for you. That's okay; we promise it won't hurt our feelings.

## *Foolish Assumptions*

Please forgive us, but we make one or two foolish assumptions about you, the reader. We assume these things:

- ✓ You have access to a high-speed Internet connection (not dial-up) and you've used a Web browser. If we assumed incorrectly, you have much more pressing problems than understanding the effective use of Salesforce.
- ✓ You have a Salesforce account and some interest in knowing how to use it, beyond the mere curiosity of reading our riveting prose.
- ✓ You have some business experience — at least enough to understand that winning deals is good, and losing deals is bad.
- ✓ You have at least a vague idea of what a database is, including basic concepts such as fields, records, files, and folders. (Imagine an organized filing cabinet and all its contents.)

## *Icons Used in This Book*



To help you get the most out of this book, we place icons here and there that highlight important points. Here's what the icons mean:

Next to the Tip icon, you can find shortcuts, tricks, and best practices to use Salesforce more effectively or productively.





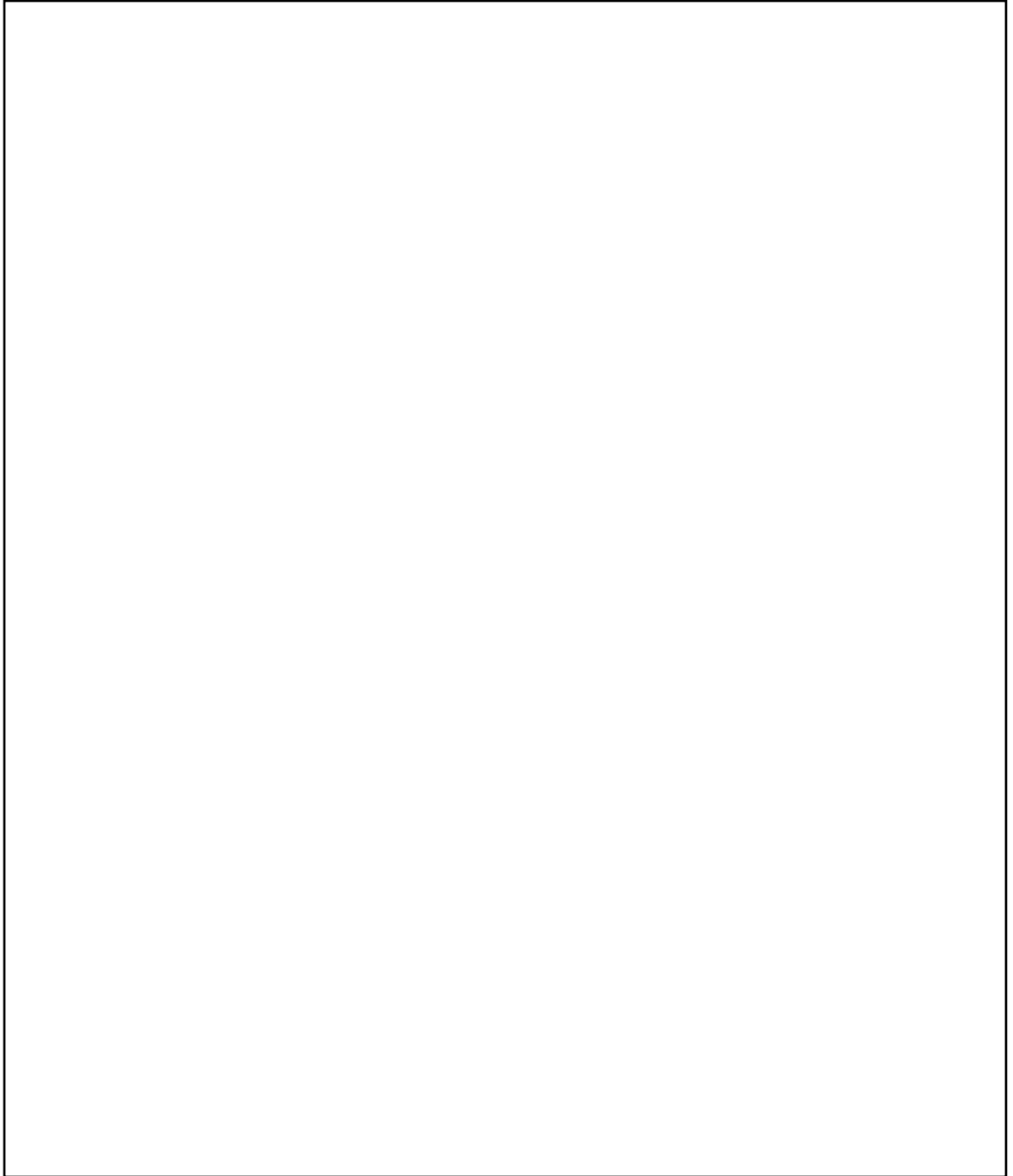
Pay extra attention when you see a Warning icon. It means that you might be about to do something that you'll regret later.



When we explain a juicy little fact that bears remembering, we mark it with a Remember icon. When you see this icon, prick up your ears. You can pick up something that could be of wide or frequent use as you work with Salesforce.



When we're forced to describe something geeky, a Technical Stuff icon appears in the margin. You don't have to read what's beside this icon if you don't want to although some readers might find the technical detail helpful.

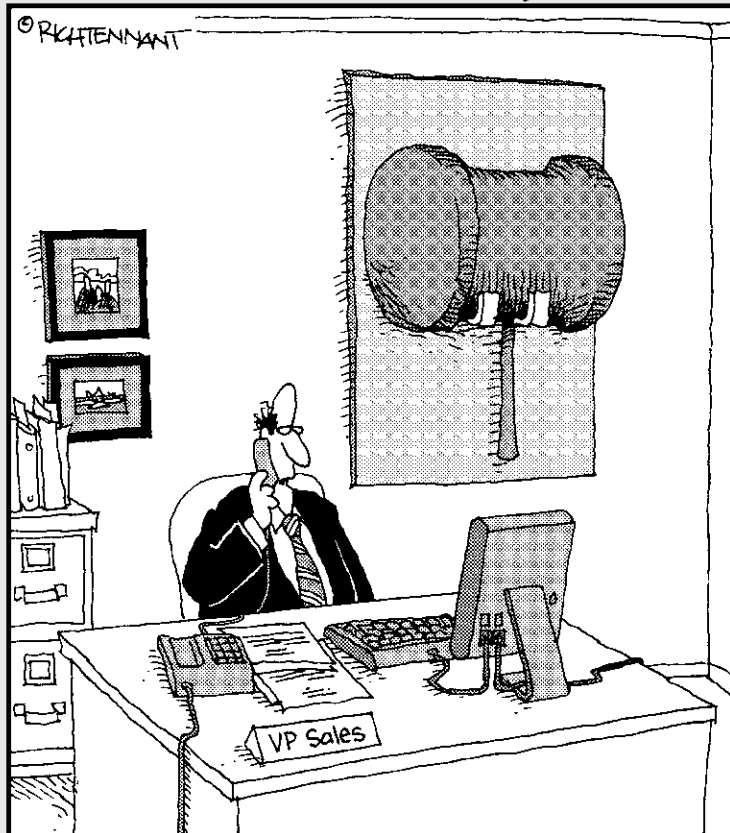


# Part I

# Salesforce Basics

The 5<sup>th</sup> Wave

By Rich Tennant



"It's Web-based, on-demand, and customizable.  
Still, I think I'm going to miss our old sales  
incentive methods."

## *In this part . . .*

**S**alesforce is a customer relationship management (CRM) system, but it's different from just about any other software solution you've ever used. Maybe that's because unlike traditional software, Salesforce is a cloud-based service, accessed via the Internet, that requires no software installation on your part; you simply log in as you would any other secure Web site, and you and your company can begin managing your partners and customers.

But that's an oversimplification. Salesforce is different from most other CRM systems. By placing the technology burden on itself, Salesforce allows you to concentrate directly on your business challenges. Its navigation is so simple that you'll actually enjoy using it. Salesforce focuses squarely on you, the user, so you can personalize your CRM system to suit your individual habits and preferences.

In this part, you find details and tips on each of these critical promises. We discuss high-level features of Salesforce and how those features can be applied to typical business challenges. You discover just how easily you can navigate Salesforce and how to personalize Salesforce to manage your business.

# Chapter 1

## Looking Over Salesforce

---

### *In This Chapter*

- ▶ Solving business challenges
  - ▶ Extending the value of what you have
  - ▶ Deciding what Salesforce size fits you
- 

**Y**ou might not realize it yet, but every time you log in to Salesforce, you're accessing an extremely powerful lever of change for you, your group, and your company.

Sounds like a tall order, but consider this: What value do you put on your customer relationships? Your partner relationships? If you're a sales rep, it's your livelihood. And if you're in management, you have fewer assets more valuable than your existing partner and customer base. What if you had a tool that could truly help you manage your partners and customers?

Salesforce isn't the first customer relationship management (CRM) system to hit the market, but it's dramatically different than the other CRM systems you might have used (spreadsheets and sticky notes count as a system, too!). Unlike traditional CRM software, Salesforce is an Internet service. You sign up and log in through a browser, and it's immediately available. Over the years, describing these types of Web-based business services has evolved. The current nomenclature uses *cloud computing*, where the customers access "the cloud" (that is, the Internet) for their business needs, and are not required to install any traditional software on, presumably, Earth. As long as you have an Internet connection, you can be anywhere in the world and have access to the clouds.

Salesforce customers typically say that it's unique for three major reasons:

- ✔ **Fast:** When you sign on the dotted line, you want your CRM system up yesterday. Traditional CRM software can take more than a year to deploy; compare that to months or even weeks with Salesforce.

- ✓ **Easy:** End user adoption is critical to any application, and Salesforce wins the ease-of-use category hands down. You can spend more time putting it to use and less time figuring it out.
- ✓ **Effective:** Because it's easy to use and can be customized quickly to meet business needs, customers have proven that it has improved their bottom lines.

With Salesforce, you now have a full suite of services to manage the customer lifecycle, divided into two product families: Sales Cloud and Service Cloud. These services include tools to pursue leads, manage accounts, track opportunities, resolve cases, and more. Depending on your team's objectives, you might use all the Salesforce tools from Day 1, or you might focus on just the functionality to address the priorities at hand.



When we discuss features of Salesforce specifically targeted toward your Sales and Marketing teams, we refer to Sales Cloud. If it's something aimed toward the Service and Support departments, we use Service Cloud.

The more you and your team adopt Salesforce into your work, the more information you have at your fingertips to deepen customer relationships and improve your overall business.

In this chapter, we reveal the many great things that you can do with Salesforce. Then we describe how you can extend Salesforce to work with many of the common applications that you already use. Finally, we help you decide which Salesforce edition is right for you, just in case you're still evaluating your options.

## *Using Salesforce to Solve Critical Business Challenges*

We could write another book telling you all the great things you can do with Salesforce, but you can get the big picture from this chapter. We focus here on the most common business challenges that we hear from sales, marketing, and support executives — and how Salesforce can overcome them.

### *Understanding your customer*

How can you sell to and retain customers if you don't understand their needs, key contacts, and what account activities and transactions have taken place? With Salesforce, you can track all your important customer data in one place so that you can develop solutions that deliver real value to your customers.

## *Centralizing contacts under one roof*

How much time have you ever wasted tracking down a customer contact or an address that you know exists within the walls of your company? With Salesforce, you can quickly centralize and organize your accounts and contacts so that you can capitalize on that information when you need to.

## *Expanding the funnel*

Inputs and outputs, right? The more leads you generate and pursue, the greater the chance that your revenue will grow. So the big question is, “How do I make the machine work?” With Sales Cloud, you can plan, manage, measure, and improve lead generation, qualification, and conversion. You can see how much business you or your team generates, the sources of that business, and who in your team is making it happen.

## *Consolidating your pipeline*

Pipeline reports give companies insight into future sales, yet we’ve worked with companies in which generating the weekly pipeline could take more than a day of cat herding and guesswork. Reps waste time updating spreadsheets. Managers waste time chasing reps and scrubbing data. Bosses waste time tearing their hair out because the information is old by the time they get it. The prevalence of cloud computing makes this traditional method of siloed data collection obsolete (or pretty darn inefficient). With Sales Cloud, you can shorten or eliminate all that. As long as reps manage all their opportunities in Salesforce, managers can generate updated pipeline reports with the click of a button.

## *Collaborating effectively with your co-workers*

Remember when you were the new guy (or gal) at the company, and you had to find out who knew everything about a particular customer, process, or product? Even at smaller companies, it takes time to discover who possesses that extra bit of historical knowledge that could help you close that important deal or resolve a support issue. Other times, you might be so busy that you’re out of the loop on certain key company updates, even when departments try to keep you informed. What if you could harness the insights from others within the company, yet not be overwhelmed by information overload? *Chatter* — a feature of Salesforce — increases internal awareness and

collaboration on the business issues that matter the most to you, so you're always up to date and never caught unawares.

## *Working as a team*

How many times have you thought that your own co-workers got in the way of selling? Oftentimes, the challenge isn't the people, but standardizing processes and clarifying roles and responsibilities. With Salesforce, you can define teams and processes for sales, marketing, and customer service so the left hand knows what the right hand is doing. Although Salesforce doesn't solve corporate alignment issues, you now have the tool that can drive and manage better team collaboration.

## *Collaborating with your partners*

In many industries, selling directly is a thing of the past. To gain leverage and cover more territory, many companies work through partners. By using Sales Cloud, your channel reps can track and associate partners' deals and get better insight about who their top partners are. Partners now can strengthen their relationships with their vendors by getting more visibility into their joint sales and marketing efforts.

## *Beating the competition*

How much money have you lost to competitors? How many times did you lose a deal only to discover, after the fact, that it went to your arch nemesis? If you know whom you're up against, you can probably better position yourself to win the opportunity. With Sales Cloud, you and your teams can track competition on deals, collect competitive intelligence, and develop action plans to wear down your foes.

## *Improving customer service*

As a sales person, have you ever walked into a customer's office expecting a renewal only to be hit with a landmine because of an unresolved customer issue? And if you work in customer support, how much time do you waste on trying to identify the customers and reviewing the context of previous support interactions? With Service Cloud, you can efficiently capture, manage, and resolve customer issues. By managing cases in Service Cloud, sales reps get visibility into the health of their accounts, and service can stay well informed of sales and account activity.



## *Accessing anytime, anywhere*

Companies are more mobile than ever before. People work from home or on the road. Offices are spread out. You expect to get access to information from multiple devices, easily and reliably. With Salesforce, you can access and manage your critical customer information, at 3 p.m. or 3 a.m., online or offline, in multiple languages, and from multiple devices.

## *Measuring the business*

How can you improve what you can't measure? Simple, huh? If you use Salesforce correctly and regularly to manage customers, you have data to make informed decisions. That benefits everyone. If you're a rep, you know what you need to do to get the rewards you want. If you're a manager, you can pinpoint where to get involved to drive your numbers. And Salesforce's reporting and dashboards give you easy-to-use tools to measure and analyze your business.

## *Extending the Value Chain*

Salesforce.com understands that you already rely on existing tools for parts of your business. Such tools might include your e-mail, Office tools, your public Web site, and your intranet. Salesforce.com isn't naïve enough to think you're going to stop using these tools. In fact, you can readily integrate Salesforce with many of the tools you use today to interact with your customers.

## *Integrating with your Web site*

For many companies, its public Web site is a primary way to communicate information to their customers. You might use your Web site as a channel for visitors to request information or to log customer service issues. When you use Salesforce, you can capture leads and cases directly from your Web site, route them directly into Salesforce, and assign them to the right reps. No more stacks of e-mails to `info@yourcompany.com` cluttering up one poor person's inbox before he or she has to re-route them to the right people. And Salesforce's assignment rules can make sure that incoming leads or cases get to the right reps in a timely manner. With minimal effort, you can even offer self-service options in the form of a public knowledge base or a private portal, enabling customers to help themselves.

## *Connecting to other Web sites*

As part of your job, you might regularly use Web sites for tasks such as researching potential customers, getting driving directions, and getting the inside scoop on your competition. With the help of your system administrator, your company can build custom links in Salesforce that can connect you directly with the relevant pages of important sites. Accessing your intranet, populating a Web form to provision a demo, creating and propagating a Salesforce record — all these tasks are within reach. And all this means time saved for you.

## *Integrating with other applications*

Your company might have other applications that contain critical customer data — financial and enterprise resource planning (ERP) applications are just a few examples. Many applications provide unique and indispensable value to your organization. Your company isn't going to retire them just because you're using Salesforce. But, based on company objectives, those applications might need to integrate with Salesforce. Because of Salesforce's open architecture, your company can integrate applications if you have the right technical assistance.

## *Managing other business processes*

When you log in to Salesforce, you see several tabs, grouped into tab sets called *apps*. Salesforce.com prioritized the development of each of those tabs based on core CRM functions. However, depending on your business needs, you might require apps that have different functionality for teams that may or may not have anything related to sales, marketing, or support. Submitting expenses and requesting vacation time are just a few examples of what any employee might need. With the Force.com platform (from salesforce.com), your company can now easily build or download these custom apps to fit your specific business needs. You can now use Salesforce for more than CRM and ultimately manage a significant portion of your business online.

## *Deciding Which Edition Is Best for You*

If you already use Salesforce, this topic might be a moot point. At the very least, you know which version of Salesforce you have.

Salesforce.com has six versions of its service. All versions have the same consistent look and feel, but each varies by feature, functionality, and pricing. If you're considering using Salesforce, consult with an account executive for more details about edition differences, pricing, and upgrade paths:

- ✔ **Personal:** Basic account, contact, and opportunity management for one person. Salesforce doesn't promote this edition anymore, but it still exists after you let your free trial run out.
- ✔ **Contact Manager:** Basic account and contact management for up to five users. No lead or opportunity tracking.
- ✔ **Group:** Basic CRM, which includes the ability to view dashboards, and track leads and opportunities, for teams of up to five users. This allows you to view the full sales lifecycle, from the initial interaction with a lead, to a closed opportunity.
- ✔ **Professional:** Thorough CRM for any size organization that's starting to nail down processes. Again, you can track the full sales lifecycle from a new lead to a close opportunity. Some optional features for businesses with more detailed process needs (such as managing marketing campaigns, creating contracts, tracking various products sold, or accessing Salesforce while offline) come at an extra cost.
- ✔ **Enterprise:** More sales and service functionality for more complex organizations. This edition provides more value than if you were to pay extra for certain add-on features in more basic editions.
- ✔ **Unlimited:** A lot more customization capabilities for extending Salesforce to other business uses. You need a dedicated (and usually technical) administrator to take advantage of all the options that this edition delivers.



Salesforce also provides two other editions, Developer Edition and Force.com Edition. These are free instances of Salesforce with which developers can test and build third-party solutions. They have full functionality but a very limited license count and storage space.

Whichever edition you choose, the good news is that every edition of Salesforce is rich with features that can help companies of every size address their business challenges. You can choose a more basic edition today and upgrade later, as needed. Because Salesforce is run in the cloud, upgrading is handled immediately and behind the scenes, so you can focus on the business processes that drive the need for new functionality. And when salesforce.com rolls out new releases of its service, it provides product enhancements for the different editions wherever relevant.

## Professional or Enterprise Edition?

Most companies tend to make a decision between using Professional and Enterprise Editions. Budget might be an issue, but the decision usually boils down to core business needs. Consider these questions:

Does your company . . .

- ✔ Have different groups with distinct sales processes, customers, and products?
- ✔ Have a sales team that needs access to Salesforce, even if there's no Internet connection?
- ✔ Have a lead generation or service team that relies on a call script when initially speaking with prospects or customers?
- ✔ Plan to integrate Salesforce with other applications?

✔ Require complex data migration into Salesforce?

✔ Need greater control over user profiles and their permissions?

✔ Sell in defined teams with specific roles?

✔ Require specific workflow or approval steps to further automate processes?

If the answer to any of these questions is a definitive "Yes," your company should probably evaluate Enterprise Edition. The extent of your company's needs in the preceding list determines whether Unlimited Edition is the optimal choice. Be sure to prioritize what you need today and figure out what can wait.

## Chapter 2

# Navigating Salesforce

---

### *In This Chapter*

- ▶ Introducing Salesforce terminology
  - ▶ Logging in to the site
  - ▶ Getting to know all the home pages
  - ▶ Working with new records
  - ▶ Detailing the record page
  - ▶ Finding help and setup options
- 

**I**f an application isn't easy to use, you won't use it. Period. Salesforce succeeds not only because it offers a universe of integrated tools, but also because users can pick it up within minutes. You navigate it much the same way you do other Web sites: by pointing and clicking over text links and buttons.

Still, you have so many ways to navigate Salesforce that it makes sense to lay down the obvious (and not-so-obvious) best practices for getting around the application.



Even if you're familiar with Salesforce, you might want to scan this chapter because we cover terms that we use repeatedly throughout this book.

In this chapter, you can find out how to log in to the Salesforce site and use the home page to manage your activities, create records, and jump to other tabs. We briefly review the major tabs and how to use the interior home pages, list pages, detail pages, and related lists. Finally, we cover where you can go for help.

## Getting Familiar with Basic Terms

Before we delve into the mechanics of navigating Salesforce, familiarize yourself with these basic terms:

- ✔ **Salesforce:** When we use the term *Salesforce*, we mean the secure Web site that your users log in to that contains your customer information. Salesforce.com, Inc., offers a family of products and has thousands of clients who use its service, but each company's secure Web site is separate from the other Web sites and might look different to suit that company's unique needs. When we use *Sales Cloud* or *Service Cloud*, those are parts of Salesforce specifically meant for use by sales and marketing, or by a support organization.
- ✔ **Home page:** This is the main page that appears when you log in to Salesforce or click the Home tab.
- ✔ **Tabs:** Clickable links appear at the top of any Salesforce page. When selected, a link is highlighted and looks like a tab, and so we continue to call them *tabs*. Each tab represents a major module in which your company needs to know some information. By clicking a tab, you go to a tab-specific home page. For example, if you click the Accounts tab, the Accounts home page appears.
- ✔ **Apps:** *Apps* are tabs that have been grouped together and given a name, providing you with the convenience of seeing only those tabs most relevant to you.
- ✔ **Tab home pages:** This is the page where you go to find, organize, and manage specific information related to a particular tab. For example, to access your opportunity records, you could go to the Opportunities home page.
- ✔ **Record:** This is made up of a bunch of fields that hold information to describe a specific item. For example, a contact record typically contains fields pertinent to a person, including name, title, phone number, and e-mail address. A record is displayed on a detail page.
- ✔ **Detail page:** This Web page shows both the saved record and a set of related lists pertinent to the record.

We often use the terms *record* and *detail page* interchangeably. From a detail page, you can perform and track a variety of tasks related to the specific record. For example, if you have and are looking at an Account detail page for Cisco, you see fields about the company and lists of other records related to Cisco.



- ✓ **Related lists:** These lists comprise other records linked to the record that you're looking at. For example, the Account detail page for Cisco might display related lists of contacts, opportunities, activities, and so on associated with that company.
- ✓ **Sidebar:** Located on the left margin of a Salesforce page, the sidebar displays a search tool, recent items, and a drop-down list that you can use to create new records.

## Accessing Salesforce

You need to log in to your account to access your company's instance of Salesforce because every company's Salesforce Web site is different, and salesforce.com goes to great lengths to protect your information.

### Setting up a password

The first time you log in to the Salesforce service, you receive an e-mail entitled `Salesforce password confirmation`. To reset your password, follow these steps:

- 1. Open the e-mail and click the first link, which contains both your user name and a temporary password.**

A page appears, prompting you to set a new password.

- 2. Complete the fields.**

Be sure to select a question and provide an answer that can verify your identity if you forget your password. Use this password from now on unless your administrator resets the passwords.

- 3. When you're done, click Save.**

The home page of Salesforce appears.

### Logging in

You log in to Salesforce just as you would any other secure Web site.

To log in, open a browser and follow these steps.

1. In your browser's address bar, type `www.salesforce.com` and then press Enter.

The `salesforce.com` public Web site appears.

2. Click the Customer Login tab highlighted in black.

The login page appears, as shown in Figure 2-1.

3. Enter your user name and password and then click the Login button.

Your user name is typically your corporate e-mail address. Select the Remember User Name check box if you want your computer to remember it. After you click the Login button, your main home page appears.



To save yourself steps when logging in, use your browser tools to bookmark the login page.

For security purposes, Salesforce notices if you're trying to log in to the Web site from a different computer or a different browser than the one you first used. If this happens, make sure you have access to your e-mail Inbox because Salesforce e-mails you a link confirming that you are who you say you are (and that you're just using a different computer or browser to log in).

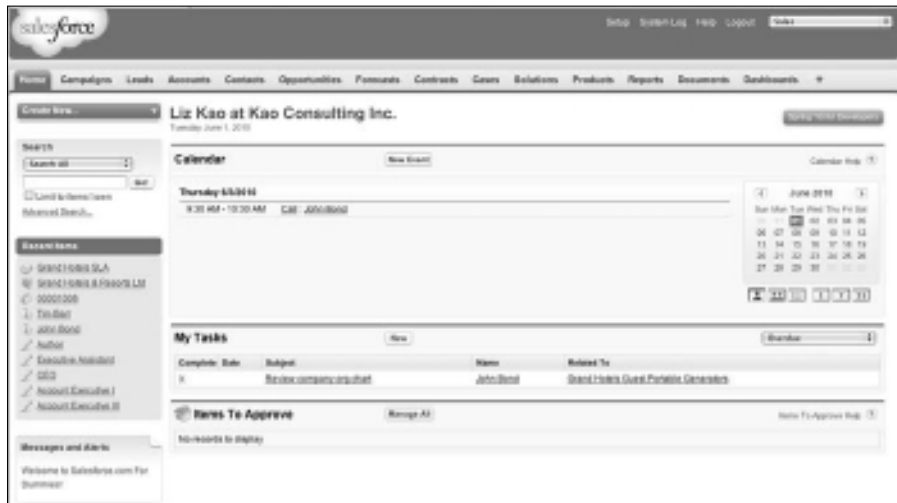


**Figure 2-1:**  
Logging in to  
Salesforce.



## Seeing the new user interface

After extensive focus group and usability testing, salesforce.com gave its user interface a pleasant makeover. If you're new to Salesforce, you see a blue-colored theme, and a smaller logo in the upper left, as shown in Figure 2-2. Fortunately for you traditionalists, the Setup area still looks the same.



**Figure 2-2:** Introducing the new, updated user interface.

## Navigating the Home Page

Every time you log in to Salesforce, you begin at your home page. The look and feel of the elements on your home page are similar to other users' home pages, but the tasks and events that appear in the body of the page are specific to you.

Use the home page to manage your calendar and tasks, jump to other areas by clicking tabs, or search and access specific information by using the sidebar. If your company uses the customizable home page feature, you might also see key charts or graphs from your company's dashboards. (*Dashboards* are visual snapshots of key performance metrics based on your custom report data.)

## Managing your calendar

The calendar section of the home page defaults to a calendar of the current month and your scheduled events for the next seven days. Like other calendar tools, the calendar allows you to drill down. Your scheduled events are based on events that you assigned to yourself or that other users have assigned to you.

From this calendar section (shown in Figure 2-3), you can do the following.

**Figure 2-3:**  
Looking  
over your  
calendar  
options.



- ✓ **Schedule a new activity.** Click the New Event button, and a New Event page appears in Edit mode. (See Chapter 7 to see how to complete a new event record.)
- ✓ **View an event record.** If you see a listed event, click the link. A page appears with details on the activity.
- ✓ **Drill into your schedule.** Click a date on the calendar to drill into your schedule for a specific day. The Day View page appears.
- ✓ **Schedule a group activity.** Click the Multi User View icon (which looks like two little people). A page appears for the selected day that displays the availability of multiple users. From there, click the New Event button and follow the same instructions for scheduling a New Event as described in detail in Chapter 7.

## Tracking your tasks

On the home page, you see a section entitled My Tasks, which displays tasks that you created for yourself or that have been assigned to you.

A *task* is an activity that you need to do, and it can have a due date. Unlike an event, however, a task doesn't have a specific time and duration. For example, if you want to remind yourself to send a proposal, you typically create a task instead of scheduling an event. (See Chapter 7 for additional tips on managing tasks.)

From the My Tasks section (as shown in Figure 2-4), you can do the following.

- ✔ **Add a new task.** Click the New button, and a New Task page appears in Edit mode.
- ✔ **Change task view.** Use the drop-down list at the top of the My Tasks section to select from a list of common task views. For example, select Overdue to see your open tasks that are past their respective due dates.
- ✔ **Review a task.** Click a link in the Subject column to review a task. A task record appears with details.
- ✔ **Go to associated records.** Click links in the Name or the Related To column.
- ✔ **Complete the task and enter any details before saving.** Click an X link in the Complete column. You can also use this link to update a task, but if you haven't completed the task, remember to adjust the Status field before you save it.
- ✔ **See more tasks.** If you have several tasks in your list, the View More link appears at the bottom of the My Tasks section on the home page. Click it to see more tasks on the list. The Day View appears, and the My Tasks section appears in the right column.

**Figure 2-4:**  
Reviewing  
the My  
Tasks sec-  
tion from the  
home page.

Complete	Date	Subject	Name	Related To
X		Update status report	John Clark	Business Logistics Manager
X		Review marketing plan	Jane Bond	Global Sales & Marketing Operations
X	6/2/2010	Process status	Andrew Jones	United Oil Office Operations
X	6/06/2010	RFP due	Lauren Boyd	United Oil installations

## Using dashboard snapshots from the home page

If your company has customized your home page, you might also see and select up to three key charts and tables from your dashboards. *Dashboards* display important information from reports in Salesforce that can provide key performance indicators on the health of your business. Each dashboard chart or table is a *component*. (See Chapter 19 for details on building dashboards that can measure and analyze your business.) As of this writing, dashboards are available in the Group, Professional, Enterprise, and Unlimited Editions.

If you see a chart or table on your home page, you can also perform these actions from the Dashboard section:

- ✓ **Click a chart or table to drill into the detail.** A report page appears with the data that supports the graphic.
- ✓ **Choose a different dashboard.** Click the Customize Page button at the top-right of the section. The Customize Your Home Page page appears, and here you can select from available dashboards if you have the proper administrator permissions. Your home page displays a snapshot of only the three components along the top of any dashboard.
- ✓ **Refresh the dashboard snapshot.** Click the Refresh button in the top of the section. In the left of the section, a date and timestamp appear of when your dashboard was last refreshed.

## *Accessing information with the sidebar*

The sidebar is the column on the left that appears on just about every page of Salesforce except for dashboards and reports. On the home page, use the sidebar to search for records, quickly go back to pages you recently accessed, stay informed about important company messages or Web sites, and create new records.

### *Finding items with Search*

You can find a majority of the information that you want by using Search. Depending on your company's sharing rules, your results might vary. To search for information, follow these steps:

- 1. In the sidebar, enter keywords into the Search field and then click the Go! button.**

A Search Results page appears, as shown in Figure 2-5. Salesforce organizes the search results in lists according to the major types of records, including accounts, contacts, opportunities, and leads.

- 2. Scroll down the page. If you find a record that you want to look at, click a link in the Name column for that record grouping.**

The detail page appears, allowing you to review the record and its related lists.

- 3. If you don't find what you want, click the Advanced Search link on the Search Results page.**

The Advanced Search page appears.

The screenshot shows the 'Search Results' page in Salesforce. The search term is 'pyramid'. The results are categorized into four sections: Accounts [1], Contacts [1], Leads [1], and Opportunities [1]. Each section contains a table of search results.

Accounts [1]			
Action	Account Name	Account Site	Phone
Edit	Pyramid Construction Inc.		(014) 427-4427

Contacts [1]					
Action	Name	Account Name	Account Site	Phone	Email
Edit	Mr. Pat Stimulac	Pyramid Construction Inc.		(014) 427-4427	pat@pyramid.net

Leads [1]						
Action	Name	Title	Phone	Company	Email	Lead Status
Edit	Mr. Pat Stimulac	SVP, Administration and Finance	33582158800	Pyramid Construction Inc.	pat@pyramid.net	Closed - Converted

Opportunities [1]					
Action	Opportunity Name	Account Name	Account Site	Stage	Close Date
Edit	Pyramid Construction Demosites	Pyramid Construction Inc.		Prospecting	3/27/2008

**Figure 2-5:**  
Looking at  
a Search  
Results  
page.



If you're focusing on a page (such as a list of search results or a report) but need to jump to a record, instead of clicking the Advanced Search link, right-click that link and choose **Open Link in New Window** from the contextual menu that appears. This approach can save you a lot of time.

### ***Creating new records***

Use the compact Create New picklist on the sidebar to quickly create any new record.

### ***Revisiting recent items***

The Recent Items section displays up to ten records that you most recently clicked. Use the list to quickly get back to records that you've been working on, even if you logged out and logged back in. The recent items show an icon and the name or number of the record. These items include mostly the records that are organized under a tab heading, such as Accounts, Contacts, and so on. To visit the detail record of a recent item, simply click a listed link.

### ***Getting more out of your home page sidebar***

With the help of your administrator, you can offer other tools and information from the sidebar on the home page to improve productivity and drive overall adoption. Review the following tips, see Chapter 21 on customizing Salesforce, and consult with your administrator if some of these features could help your organization:

- ✔ **Add new search tools.** The Search and Advanced Search tools can't find product, document, and solution records in Salesforce. Your company, though, can customize home page layouts with any or all of these specific search tools. Depending on your profile, some or all of these tools might help you do your job better. For example, if you're in customer service, you might need a search tool on your home page to help you quickly search for solutions to common inquiries.
- ✔ **Update company messages.** Your administrator can add messages to the home page to keep users informed of important announcements. For example, if you're in sales management, you might want to use the home page to alert reps to end-of-quarter goals or bonus incentives.
- ✔ **Emphasize important custom links.** If you rely on other Web sites to do your jobs, your administrator can help you post them for all your users or just ones that fit certain profiles. For example, if you have a company intranet, your company can add useful links to the home page sidebar so that you can quickly access information outside of Salesforce without ever leaving Salesforce.



If you'd rather not have the sidebar take up some of your browser window's real estate, Salesforce allows you to hide and expand the sidebar when you want. Your administrator can set up this option by choosing Setup⇨App Setup⇨User Interface and selecting the Enable Collapsible Sidebar check box.

## *Navigating the Apps*

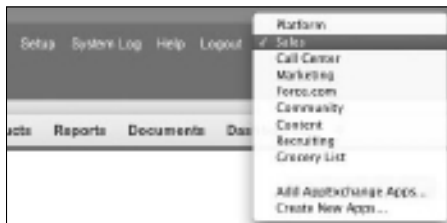
Salesforce allows you to organize tabs into groups. These groups, also known as *apps*, help reduce screen clutter and give you quicker access to the tabs that you use the most. For example, a marketing manager might rarely use the Cases or Solutions tab but spend most of her time looking at Campaigns and Leads.

With the salesforce.com Force.com platform, your company can now create custom apps for more specific uses within CRM — or for anything else, for that matter. Sales reps can use an expense reporting app, and product managers can use a product release app to manage their product requirements. The mind-blowing part of all this is that apps can comprise standard tabs or *custom ones that don't even exist*. Anyone in your company can benefit from sharing one set of data. And don't worry if you're not the most creative type. Salesforce.com has a bunch of prebuilt apps available (for free or for an additional charge), which we discuss in more detail in Chapter 22.

## Discovering the Force.com app menu

In the upper-right corner of any Salesforce page, you can find the Force.com app menu (see Figure 2-6). The picklist allows you to switch between apps. You find some standard tab groupings, such as Sales and Call Center. Administrators can also add or create new apps to address what their specific users need to see. Don't worry if you choose an app and see new tabs. You can always go back to the picklist, select your previous app, and have your familiar tabs return.

**Figure 2-6:**  
Choosing apps by using the Force.com app menu.



## Finding out about the tabs

If the tabs in Salesforce look familiar, they should. When the founders of salesforce.com designed it, they patterned the site after popular Web sites such as Amazon, where you click a tab to jump to an area.

In this section, we describe the major tabs in Salesforce and how to use the tab home pages to quickly access, manage, or organize information.

Each tab within Salesforce represents a major module or data element in an interconnected database. That's as technical as we get.

In the following list, we briefly describe each of the standard tabs (as shown in Figure 2-7). We devote a chapter to each of the tabs mentioned here.

**Figure 2-7:**  
Navigating through the tabs.



- ✔ **Campaigns:** Specific marketing activities that you manage to drive leads, build a brand, or stimulate demand.
- ✔ **Leads:** *Suspects* (people and companies with whom you want to do business). But don't start grilling your lead about where she was on the morning of June 23 because the only clue you'll gather is the sound of a dial tone.
- ✔ **Accounts:** Companies with whom you currently do or previously did business. You can track all types of accounts, including customers, prospects, former customers, partners, and competitors.
- ✔ **Contacts:** Individuals associated with your accounts.
- ✔ **Opportunities:** The deals that you pursue to track transactions or drive revenue for your company. Your open opportunities constitute your pipeline, and opportunities can contribute to your forecast.
- ✔ **Cases:** Customer inquiries that your support teams work to manage and resolve.
- ✔ **Solutions:** Answers to cases and other frequently asked questions.
- ✔ **Products:** 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.
- ✔ **Reports:** Data analyses for you and your entire organization. Salesforce provides a variety of best practices reports, and you can build custom reports on the fly to better measure your business.
- ✔ **Documents:** The sales and marketing collateral and documents that you use as part of your selling or service processes.
- ✔ **Dashboards:** Graphs, charts, and tables based on your custom reports. You can use dashboards to visually measure and analyze key elements of your business.

## *Discovering a tab home page*

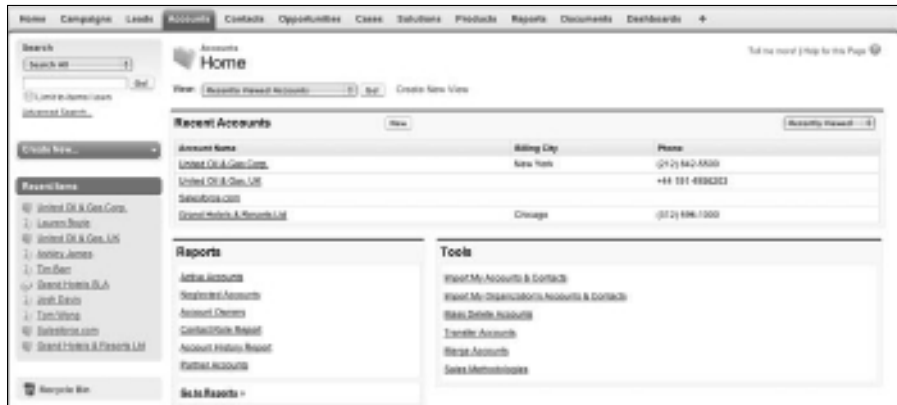
When you click a tab, the tab's interior home page appears. For example, if you click the Accounts tab, the Accounts home page appears. The tab's home page is where you can view, organize, track, and maintain all the records within that tab.

Do this right now: Click every tab visible to you.

The look and feel of the interior home pages never change, regardless of which tab you click (except for the Home, Reports, and Dashboards tabs). On the left, you have the sidebar with Search, the Create picklist, Recent Items, and (depending on your company and the tab) a Quick Create tool.



In the body of the page, you have a View drop-down list, a Recent Items section related to whichever tab you're on (for example, Recent Accounts), and sections for popular Reports and Tools (see Figure 2-8).



**Figure 2-8:**  
Deconstructing the tab home page.

### Using the View drop-down list

Strategy and execution are all about focus. With views, you can see and use lists to better focus on your business. A *view* is a segment of the tab's records based on defined criteria. When you select a view, a list of records appears based on your criteria.

On each tab, Salesforce provides a selection of popular default views to get you started. To try a view (using Accounts as the example), follow these steps (which apply to all tabs):

#### 1. Click the Accounts tab.

The Accounts home page appears (refer to Figure 2-8).

#### 2. Select My Accounts from the View drop-down list.

A list page appears that displays a set of columns representing certain standard account fields and a list of your account records. If no account records appear, you don't own any in Salesforce.

#### 3. From the list page, you can perform a variety of functions:

- *Re-sort the list.* Click a column header. For example, if you click the Account Name header, the list sorts alphabetically, as shown in Figure 2-9.
- *View records beginning with a certain letter.* Click that letter link above the list to view those records.

- *Display fewer or more records on the page.* Click the up or down button at the bottom of the page or the Next Page link to see the next set of records.
- *View a specific record.* Click the link for that record in the Account Name column. The Account detail page appears, displaying the record and its related lists.
- *Update a specific record.* Click the Edit link at the beginning of its row. The account record appears in Edit mode.
- *Delete a record.* Click the Del link near the beginning of that record's row. A pop-up window appears, prompting you to click OK to accept the deletion. If you click OK, the list page reappears, minus the account that you just wiped out. Don't worry: Later in this chapter, in the section "Resurrecting records from the Recycle Bin," we show you how to bring recently deleted records back to life.

Action	Account Name	Account Site	Billing State/Province	Phone	Type	Owner Alias
<input type="checkbox"/> Go   Del	Eastregon Textiles, Inc.		NC	(336) 222-7908	Customer - Direct	LSize
<input type="checkbox"/> Go   Del	Diskless, etc.		KS	(785) 241-8208	Customer - Channel	LSize
<input type="checkbox"/> Go   Del	Edge Communications		TX	(512) 757-8808	Customer - Direct	LSize
<input type="checkbox"/> Go   Del	Express Logistics and...		OR	(503) 421-7808	Customer - Channel	LSize
<input type="checkbox"/> Go   Del	GenCorp		CA	(850) 857-3458	Customer - Channel	LSize
<input type="checkbox"/> Go   Del	Grand Hotels & Resorts...		IL	(312) 908-1808	Customer - Direct	LSize
<input type="checkbox"/> Go   Del	Dynamat Construction Inc.			(914) 422-4427	Customer - Channel	LSize
<input type="checkbox"/> Go   Del	Salesforce.com				Other	LSize
<input type="checkbox"/> Go   Del	iStock		CA	(415) 801-7808		LSize
<input type="checkbox"/> Go   Del	United Oil & Gas Corp.		NY	(212) 842-8808	Customer - Direct	LSize
<input type="checkbox"/> Go   Del	United Oil & Gas, Singap.		Singapore	(850) 458-8818	Customer - Direct	LSize
<input type="checkbox"/> Go   Del	United Oil & Gas, UK		UK	+44 191 4895253	Customer - Direct	LSize
<input type="checkbox"/> Go   Del	University of Arizona		AZ	(520) 773-8858	Customer - Direct	LSize

**Figure 2-9:**  
Re-sorting  
a list.

### *Building a custom view*

If you have a particular way you like to look at records, you can build a custom view. If you have the right permissions, you can share this view with other groups or your entire organization. (Or maybe you should just keep your views to yourself.)

To create a custom view (using Contacts as the example), follow these steps (which apply to all tabs):

- 1. Click the Contacts tab.**

The Contacts home page appears.

- 2. To the right of the View drop-down list, click the Create New View link.**

A Create New View page appears.

**3. Name the view by typing a title in the Name field.**

For example, if you want to create a list of your contacts that are senior executives, use a title like My Senior Execs.

**4. Select whether you want to search All Contacts or just My Contacts by selecting one of the two radio buttons.**

In this example, select the My Contacts radio button.

For this running example, assume that your marketing manager created campaigns. You might want to tie a campaign to filter your List View after identifying which Contacts you want the view to search.

**5. Type the campaign name into the Campaign Name field.**

Typing a campaign to your List View filters your results to those contacts related to a specific marketing campaign. You must have the proper permissions in the Professional, Enterprise, and Unlimited Editions for this capability.

**6. (Optional) Below the Filter by Additional Fields area, enter search criteria.**

A basic criteria query is made up of three elements:

- *Field*: The leftmost box is a drop-down list of all the fields on the contact record. In this example, choose Title.
- *Operator*: The middle box is a drop-down list of operators for your search. That sounds complicated, but it's easier than you think. For this example, select the Contains option.
- *Value*: In the rightmost box, type the value that you want in the search. In this example, you might type **vp, vice president, ceo, cio, cto**.

**7. Select the columns that you want displayed by selecting a value from the drop-down lists in some or all of the fields provided.**

Although Salesforce's preset views take common fields, such as Phone and Email, you can select any of up to 15 fields to display on your custom view page.

**8. Decide whether you want others to see your custom view.**

Administrators and certain users have this permission. Your decision is made simple if the step doesn't appear. Otherwise, select one of the three options. (Basically, the three radio buttons translate to all, none, or selective.) If you choose the third option, use the drop-down list to select a group and then click the arrows to move that group into the Shared To column.

### 9. Click Save.

A new view appears based on your custom view criteria. If you don't get all the results that you anticipate, double-check and refine the search criteria. For example, if your list should include directors but doesn't, click the Edit link and update the view.



As long as you save your custom view, you can use it later from the Views menu.

### *Reviewing the Recent Items section*

On a tab's home page, just below the views, you see a Recent Items section. (The name of the item will match whatever type of record you're on. For example, Recent Accounts is the section name if you're in the Accounts tab.) This section comes with three or four relevant columns that you can modify. You can see as few as 10 items and as many as 25 items at a time by clicking the link at the bottom of the table.

To test the Recent Items section (by using Leads as the example), go to the Leads home page and follow these steps (which you can apply to all tabs):

**1. In the Recent Leads section, select an option from the drop-down list at the top-right corner of the table.**

The table reappears with changes based on what you select.

**2. Click a link in the table to go to a record.**

The detail page appears, displaying the record and related lists.

**3. Click the New button in the top-middle of the table to create a new lead record.**

A New Lead page appears in Edit mode, ready and waiting. (See Chapter 9 to read more about the fields in the Lead record.)

### *Reviewing common reports*

In the bottom-left corner of a tab's home page, Salesforce displays a small selection of commonly used reports associated with that tab. You can click a link to go directly to the report or click the Go to Reports link, which takes you to the Reports home page.

### *Tooling through the Tools section*

In the bottom-right corner of a tab's home page, Salesforce provides a set of unique tools associated with a particular tab. Depending on which tab you're viewing, use these tools to help you manage and maintain records within that tab. For example, on the Accounts home page, in the Tools section, you can click the Merge Accounts link to merge duplicate accounts. See the related chapters later in this book for details on using specific tools.

## Managing Records

By using the Create New drop-down list on the sidebar of any page in Salesforce, you can easily add new records into Salesforce. You might find yourself in the position of having deleted important files; don't worry, though, because Salesforce gives you a way to put them back in their rightful spots before anyone notices they're missing.

### Creating records

To create a record (by using Contacts as the example), follow these steps (which can be applied to all Create New *Items* on the picklist):

1. **On the home page, select the Contact option on the Create New picklist, as shown in Figure 2-10.**

A New Contact page appears in Edit mode.

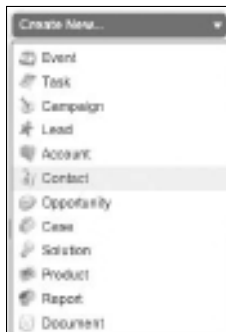
2. **Complete the fields, as necessary.**

Even while you're in Edit mode, the picklist is available.

3. **When you're done, click Save.**

The Contact detail page appears, and here you can begin tracking information.

**Figure 2-10:**  
Creating records by using the Create New drop-down list.



### Resurrecting records from the Recycle Bin

Occasionally, you delete a record and regret it. Don't panic — the Salesforce Recycle Bin gives you 30 days to restore up to 5,000 recently deleted records, including any associated records (such as activities deleted in the process), and your credibility.

To restore a deleted record, follow these steps:

**1. On your sidebar, click the Recycle Bin link.**

The Recycle Bin page appears. If you're an administrator, use the View picklist to view and restore records deleted within the last 30 days by other users.

**2. Navigate the list as you would a normal list page until you find the desired record or records.**

**3. Select the check box(es) in the Action column corresponding to the record(s) that you want to restore.**

You can click the Select All link to select all the records on the page.

**4. When you're done, click the Undelete button.**

The Recycle Bin page reappears, and a link to your restored record appears in the sidebar below Recent Items.



## *Detailing the Record*

After you create a record, the record appears on its own detail page (see Figure 2-11). You can use the detail page to update the record fields or manage and track activities and common operations on the related lists displayed below the record. In this section, we show you how to navigate the detail page. The other chapters in this book give you specific details about managing particular related lists.



Many of the features that we describe in the following sections aren't enabled by default. Have your administrator choose Setup⇨App Setup⇨User Interface to turn on many of these capabilities.

## *Using links and buttons on the detail page*

At the top of any record's detail page, you can use several links and buttons to perform different actions. Go to any detail page and try these out:

- ✓ **Toggle between list and details.** At the top left of the page, below the folder icon, click the Back to List link. If you've been working from a list, that list page appears. Click the Back button on your browser to return to the detail page.
- ✓ **Edit a record.** Click the Edit button to edit the record. The record appears in Edit mode. Click the Back button to return to the detail page.

Account **United Oil & Gas Corp.** Customize Page | Edit Layout | Printable View | Help for this Page

[Back to List: Accounts](#) [Contacts](#) | [Opportunities](#) | [Cases](#) | [Open Activities](#) | [Activities History](#) | [Notes & Attachments](#) | [Partners](#)

### Account Detail

[Edit](#) [Delete](#) [Include Offline](#)

Account Owner	<a href="#">Liz Kim (C Manager)</a>	Rating	High
Account Name	United Oil & Gas Corp. <a href="#">View Hierarchy</a>	Phone	(212) 642-8508
Parent Account		Fax	(212) 642-8501
Account Number	00055110	Website	<a href="#">http://www.uogc.com</a>
Account Site		Ticker Symbol	UOGC
Type	Customer - Direct	Ownership	Public
Industry	Energy	Employees	148,000
Annual Revenue	\$5,658,000,000	SIC Code	4457
Billing Address	1301 Avenue of the Americas New York, NY 10018 USA	Shipping Address	1301 Avenue of the Americas New York, NY 10018 USA
Customer Priority	High	SLA	Platinum
SLA Expiration Date	11/12/2009	SLA Total Number	6854
Number of Locations	995	Upsell Opportunity	Yes
Active	Yes		
Created By	<a href="#">Liz Kim</a> 4/16/2010 1:54 PM	Last Modified By	<a href="#">Liz Kim</a> 4/16/2010 1:54 PM
Description	World's first liquid oil and gas company.		
Custom Links	<a href="#">Billing</a>		

[Edit](#) [Delete](#) [Include Offline](#)

### Contacts

[New Contact](#) [Merge Contacts](#) Contacts Help

Action	Contact Name	Title	Email	Phone
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Lizbeth Blythe</a>	VVP, Technology	<a href="#">Blythe@uogc.com</a>	(212) 642-8508
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Arl Dattari</a>	CFO	<a href="#">adattari@uogc.com</a>	(212) 642-8508
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Stella Pasolunghi</a>	VVP, Production	<a href="#">stella@uogc.com</a>	(212) 642-8508
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Arthur Song</a>	CEO	<a href="#">ASong@uogc.com</a>	(212) 642-8508

### Opportunities

[New Opportunity](#) Opportunities Help

Action	Opportunity Name	Stage	Amount	Close Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">United Oil Emergency Generators</a>	Closed Won	\$443,808.00	3/21/2008
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">United Oil Installations</a>	Closed Won	\$270,808.00	3/21/2008
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">United Oil Installations</a>	Negotiation/Review	\$270,808.00	3/21/2008
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">United Oil Office Portable Generators</a>	Negotiation/Review	\$125,808.00	3/21/2008
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">United Oil Installations</a>	Closed Won	\$235,808.00	3/21/2008

[Show Columns](#) | [Go to list \(13\)](#)

### Cases

[New Case](#) Cases Help

Action	Case	Contact Name	Subject	Priority	Date Entered	Status	Owner
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">00081381</a>	<a href="#">Arl Green</a>	Performance inadequate for second consecutive week	High	4/16/2010	Closed	<a href="#">Liz Kim</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">00081382</a>	<a href="#">Stella Pasolunghi</a>	Seeking guidance on electrical wiring installation for GC-5008	Low	4/16/2010	New	<a href="#">Liz Kim</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">00081321</a>	<a href="#">Stella Pasolunghi</a>	Generator GC-3058 platform structure is weakening	High	4/16/2010	Closed	<a href="#">Liz Kim</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">00081322</a>	<a href="#">Stella Pasolunghi</a>	Signal panel on GC-5853 is misinterpreted by	Medium	4/16/2010	Closed	<a href="#">Liz Kim</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">00081323</a>	<a href="#">Stella Pasolunghi</a>	Electric surge damaging adjacent equipment	High	4/16/2010	Closed	<a href="#">Liz Kim</a>

[Show Columns](#) | [Go to list \(7\)](#)

### Open Activities

[New Task](#) [New Event](#) Open Activities Help

Action	Subject	Name	Related To	Task	Due Date	Status	Priority	Assigned To
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Process slides</a>	<a href="#">Ashley James</a>	<a href="#">United Oil Office Portable Generators</a>	✓	8/21/2010	Not Started	Normal	<a href="#">Liz Kim</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RFP due</a>	<a href="#">Lauren Sando</a>	<a href="#">United Oil Installations</a>	✓	6/30/2010	Not Started	High	<a href="#">Liz Kim</a>

### Activity History

[Log & Call](#) [Mail Merge](#) [Send An Email](#) Activity History Help

No records to display

### Notes & Attachments

[New Note](#) [Attach File](#) Notes & Attachments Help

No records to display

### Partners

[New](#) Partners Help

No records to display

**Figure 2-11:**  
Looking  
over the  
detail page.

- ✓ **Delete the current record.** Click the Delete button to delete the current record that you're viewing. Click the Cancel button in the pop-up window if you change your mind about the deletion.
- ✓ **Share the record with other users.** Click the Sharing button. (This button doesn't appear on all records.) Click the Back button to return to the detail page.
- ✓ **Quickly jump to the corresponding related list further down the page.** Click the related list "hover links" at the top of each detail page, if enabled by your administrator. Alternatively, hover your mouse over the link to open a snapshot of the records displayed in that related list.
- ✓ **View a printable version of the page in a new window.** Click the Printable View link in the top right, and then click the Print This Page link in the top-right corner of the window to print a copy of the entire page. Many users like to print hard copies that they can review while traveling.

## Modifying records with inline editing

To cut down on the number of steps you have to take when you update records in Salesforce, you can edit fields directly in detail pages.

Make sure your administrator has enabled this feature.

Follow these steps to edit a field directly in that Web page, without having to go to another page. Salesforce calls this *inline editing*.



### 1. Hover your mouse over any field on a record that you own (and thus have permission to edit).

Figure 2-12 shows the e-mail address of a contact within a company being updated.

An icon appears to the right of a field, telling you whether you can edit that field:

- *Pencil:* This icon appears to the right of editable fields, which become highlighted in white.
- *Padlock:* This icon appears to the right of fields that you can't edit.
- *None:* You can edit a field that doesn't have an icon, but not with the inline editing feature. You have to edit the record the old-fashioned way, using the Edit button.

### 2. Double-click an editable field and update the information in that field.

### 3. Press Enter to complete editing that field.



**Figure 2-12:**  
Editing a  
field inline.

Ms. Lauren Boyle

Contact Detail

Contact Owner: Liz Kao (Change)

Name: Ms. Lauren Boyle

Account Name: United Oil & Gas Corp.

Title: SVP, Technology

Department: Technology

Birthdate: 8/5/1958

Phone: (212) 842-8900

Home Phone:

Mobile: (212) 842-5811

Other Phone:

Fax: (212) 842-8901

Email: BoyleL@uog.com

4. After you finish editing all the fields you want for that record, click the Save button for the record.



If you happen to delete information in a field that requires something in it, don't worry. Salesforce is smart enough to remind you about required fields before letting you save your changes.

## Capitalizing on related lists

*Related lists:* Say it three times so you don't forget the term. By designing the page with related lists, Salesforce enables you to gain 360-degree customer visibility and ensure that more detailed information is only a click away. For example, if you open an Account detail page for one of your major customers and scroll down below the record fields, you can see multiple contacts, activities, opportunities, cases, notes, attachments, and so on listed as links from organized related lists. And if you don't see these links, you have work to do.

## Looking things up with lookup hovers

On any detail page, you can hover your mouse over a lookup field to get a pop-up preview of that other record's contents. Figure 2-13 shows a preview of the account record by hovering over a contact's company name.

**Figure 2-13:**  
Hovering  
over a  
lookup field  
provides a  
preview of  
that record.

Ms. Lauren Boyle

Contact Detail

Contact Owner: Liz Kao (Change)

Name: Ms. Lauren Boyle

Account Name: United Oil & Gas Corp.

Title: SVP, Technology

Department: Technology

Birthdate: 8/5/1958

Reports To: Mike, Ops Chief

Lead Source: Public Relations

Phone: (212) 842-8900

Home Phone:

Mobile: (212) 842-5811

Other Phone:

Fax: (212) 842-8901

Email: BoyleL@uog.com

Account Name: United Oil & Gas Corp. View Edit

Title: SVP, Technology

Department: Technology

Birthdate: 8/5/1958

Reports To: Mike, Ops Chief

Lead Source: Public Relations



The lookup hover feature isn't enabled by default, so if you want it, ask your administrator to set it up for you.

A *lookup field* is any field that actually links to another record. A lookup field's content is underlined to show that it acts as a link to another record. (Just don't confuse lookup fields with the set of related lists that appears below the main body of a record's detail page.)

## Getting Help and Setting Up

In the top-right corner of any Salesforce page, to the left of the Force.com app menu, you can find a set of links that can help you get more out of Salesforce:

- ✓ **Setup:** Click this link to open a page containing the Personal Setup menu. Modify your personal setup, or if you're an administrator, administer and customize Salesforce for your company.
- ✓ **Help:** Click this link to open a window that contains the Salesforce Help & Training home page and additional tabs for help, support, and training.
- ✓ **Logout:** Click this link to log out of Salesforce. Alternatively, you can just close your browser to log out of your session.



If the System Log link appears in between the Setup and Help links, ignore it for now. This link is for technical administrators who use it to analyze or troubleshoot automated processes and the use of Apex code.

## Chapter 3

# Personalizing Your System

---

### *In This Chapter*

- ▶ Finding out about Personal Setup
  - ▶ Changing your personal settings
  - ▶ Working away from work
  - ▶ Adding your contacts to Salesforce
- 

**S**alesforce was built by salespeople for salespeople. The tool had to be simple to use, relevant to the business of selling, and customizable so that you could use it to do your job more effectively.

From the Personal Setup page, you can personalize your application to better suit the way you look at and manage your business. And if you capitalize on the tools available to you in Salesforce, you can give yourself an edge against the competition and your peers.

In this chapter, we describe how to modify your settings by using Personal Setup, change your display, and access Salesforce anytime, anywhere.

## *Using the Personal Setup Menu*

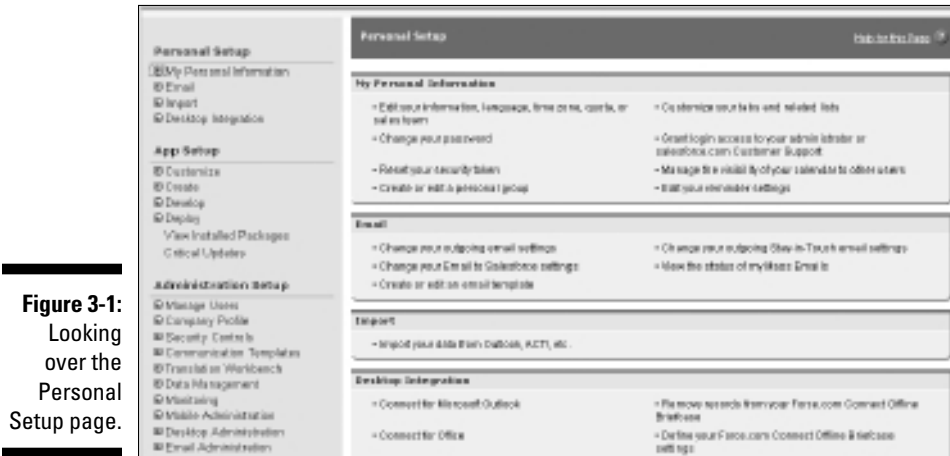
*Personal Setup*, which you can access by clicking the Setup link when you log in to Salesforce, is a set of tools and options that you can use to set up and customize Salesforce according to your individual preferences. You can decide to show only certain tabs, synchronize your Salesforce data with Outlook, and work with Salesforce while you're not connected to the Internet.

Salesforce makes it easy for you to better personalize your system by providing all your setup tools in one area.

To locate and navigate your Personal Setup area, follow these steps.

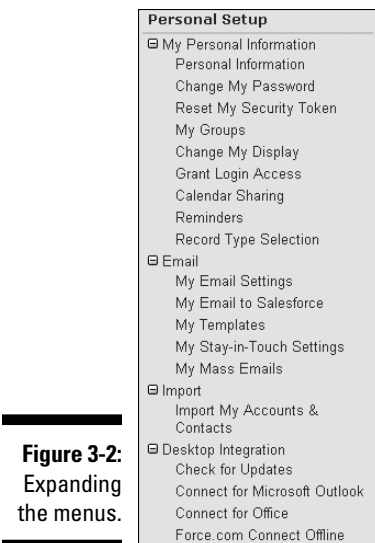
### 1. Click the Setup link at the top of any page.

The Personal Setup page appears with an expandable sidebar, as shown in Figure 3-1. The body of the page and the sidebar work hand in hand, but we like to use the sidebar so that we don't get lost.



### 2. Click all the small + icons below the Personal Setup heading on the sidebar so you can see the full range of options (shown in Figure 3-2).

Menus appear. The body of the page doesn't change if you simply expand the heading within the sidebar.



3. **Click any heading.**

The page for that heading appears.

4. **Click the Back button on your browser to return to the previous page, or click another heading to open that heading's page.**

You've mastered basic navigation in the Personal Setup menu.

## *Modifying Your Personal Information*

By expanding the My Personal Information heading, you can keep your user record current, set preferences, and customize your display to suit your tastes.

### *Updating your user information*

In Salesforce, you have a user record that corresponds to you. You can use that record to keep other users up to date on your contact information.



To find out how to navigate to the Personal Setup area, see the preceding section.

To modify your user record, follow these steps:

1. **Click the My Personal Information heading or the small + to the left of that heading on the sidebar (refer to Figure 3-1).**

A series of options appears below the heading.

2. **Click the Personal Information link.**

Your User record appears.

3. **Click Edit.**

The record appears in Edit mode. Review the accuracy of your personal information and update it.

Especially if you travel frequently, make sure that you update your time zone both in Salesforce and on your laptop, reflecting your current location. This is particularly important if you're managing your schedule and synchronizing with offline tools, such as Outlook.



4. **When you're done, click Save.**

Your User record appears again with the updated information.

## *Changing your display*

If you log in and feel as if you really need only a fraction of the tabs or a select number of related lists, you can customize your display. Your administrator can still override your personal setup, if necessary: for example, after installing an AppExchange application that comes with additional tabs.

Salesforce already provides many standard tabs and groups some of them into apps that you choose from the Force.com app menu. Companies can also create their own tabs. For most users, you just don't need to see all those tabs at the same time.

To customize your tabs, follow these steps:

- 1. Click the Change My Display link on the Personal Setup sidebar (refer to Figure 3-2).**

The Change My Display page appears.

- 2. Click the Customize My Tabs button if you want to add, remove, or change the order of your tabs within an app.**

The Customize My Tabs page appears.

- 3. Select which app's tab set you want to customize from the Custom App drop-down list.**

The default Selected Tabs list changes when you change the Custom App selection. Salesforce pre-groups its tabs into several standard apps for various common business functions. Depending on your business, having these tabs visible may be perfect, or you may want to see more or fewer tabs.

- 4. Use the Add or Remove arrow buttons to highlight a tab and then add it to or remove it from your display, respectively, as shown in Figure 3-3.**

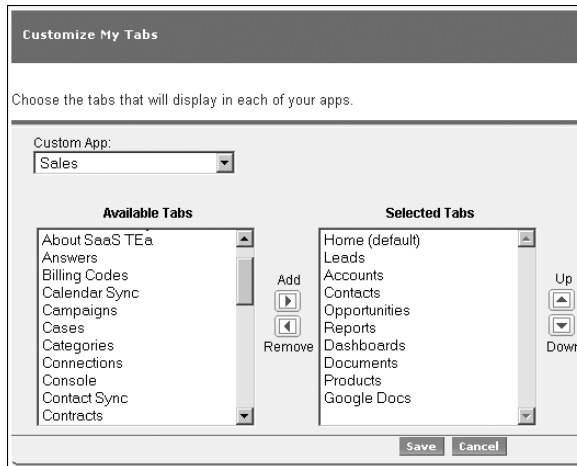
For example, if you're in marketing and spend most of your time with leads, you might decide to add the Campaigns tab and remove the Opportunities tab from your Sales custom app.

- 5. Use the up and down arrows to change the order of the tabs.**

The only exception is that you can't move or remove the Home tab.

- 6. When you're done, click Save.**

The Change My Display page reappears, and your tabs reflect your changes.



**Figure 3-3:**  
Modifying  
your tabs.

## *Customizing pages*

You can also personalize your display by changing the layout on a record page. Doing so enables you to see the most relevant sections first. For example, if you work in a call center, you may want to see cases at the top of your related lists on an account page.

To customize the display of a page, follow these steps:

- 1. Click the Change My Display link on the Personal Setup sidebar (refer to Figure 3-2).**

The Change My Display page appears.

- 2. Go to the drop-down list in the Customize My Pages section and select a specific tab that you want to modify (the Accounts tab, for instance). Then click the Customize My Pages button.**

The Customize My Page page appears.

- 3. Select lists from the two list boxes and then add or remove them from your page.**

For example, if you sell directly to customers, you might want to remove the Partners related list from the Account detail page.

- 4. Use the up and down arrows to change the order of the lists on your page layout.**

- 5. When you're done, click Save.**

The Change My Display page reappears.

## Granting login access

When you need help from your administrator or salesforce.com customer support, you can grant either or both temporary login access to your account. By gaining access to your account, the person helping you can provide better assistance because she can view your pages.

To grant login access, follow these steps:

1. **Click the Grant Login Access link on the Personal Setup sidebar (refer to Figure 3-2).**

The Grant Login Access page appears.

2. **Grant support and/or administrator access by entering an expiration date in the appropriate Expiration Date field.**

Your administrator or salesforce.com support will be able to log in as you through the expiration date.

3. **When done, click the Save button.**

The My Personal Information page appears.



TIP

If you're an administrator and a user has granted you access, you can log in to the user's account as follows: Below the Manage Users heading on the sidebar, click the Users link and then select the Active Users list. On the list, click the Login link to the left of the user's name.



REMEMBER

If you use a Web-based e-mail system like Google Gmail or Yahoo! Mail, you can save specific e-mails that you send to your customers right into Salesforce without having to manually copy and paste that activity. This integration is very encouraging for businesses that are increasingly running all their business applications online. Follow these steps:

1. **Choose Setup⇨Personal Setup⇨Email.**

You see this command only if your administrator has enabled the Email to Salesforce feature.

2. **Click the My Email to Salesforce link.**

You go to the My Email to Salesforce page. A highlighted `Your Email to Salesforce` address field in the middle of the page provides a long e-mail address composed of random alphanumeric characters for you to add into the BCC field of the e-mail you're composing that you want automatically saved in Salesforce. Salesforce looks at the recipient's e-mail address and looks for a matching Lead or Contact within Salesforce with which to associate the e-mail activity.



We discuss more specifics about saving e-mails to Salesforce in Chapter 8.

## *Working with Salesforce Remotely*

If travel is part of your job, you might not always be connected to the Internet, let alone to your laptop. In spite of this, you still have many options for accessing your important data from Salesforce, including synchronizing with Outlook and working with Force.com Connect Offline.

### *Synchronizing with Outlook*

Connect for Microsoft Outlook allows you to record Microsoft Outlook e-mails into Salesforce via a plug-in that also synchronizes your Outlook's contacts, meetings, and tasks. In the following sections, we show you how to install and configure Connect for Microsoft Outlook and then back up your data prior to your first synchronization.



If you're the administrator responsible for maintaining accurate data in Salesforce, encourage your company to adopt Salesforce as the system of record or "the single source of truth." For example, tell users to make updates to accounts and contacts in Salesforce rather than in Outlook. Then, have them configure Connect for Microsoft Outlook to allow Salesforce to win if a conflict resolution occurs between Salesforce and Outlook. By doing this, you can reduce common synchronization issues and influence greater Salesforce adoption.

#### *Installing and configuring Connect for Microsoft Outlook*

In most cases, installing Connect for Microsoft Outlook is a simple process. If you connect to the Internet via a proxy server or your company has a firewall, you might want to consult with your IT department.

To download and install Connect for Microsoft Outlook, follow these steps:

- 1. Choose Personal Setup** → **Desktop Integration** → **Connect for Microsoft Outlook on the sidebar.**

The Connect for Microsoft Outlook page appears.

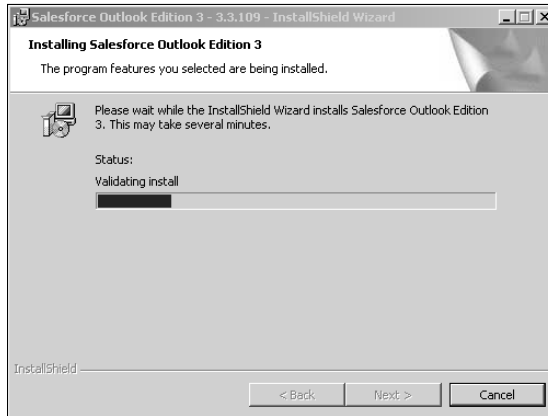
- 2. Click the Install Now button.**

The installation process begins. In the upper left of the section, a subtle status line appears after your installation starts.

A new InstallShield Wizard window appears.

**3. Follow the appropriate steps in the InstallShield Wizard, as shown in Figure 3-4.**

After your installation is complete, the Connect for Microsoft Outlook page reappears.



**Figure 3-4:**  
Installing  
Connect for  
Microsoft  
Outlook.

**4. Open Microsoft Outlook to configure your Connect for Microsoft Outlook settings.**

A Connect for Microsoft Outlook screen appears to show you that it's been successfully installed in Outlook. The setup wizard appears. If you want to return to this setup wizard another time, select the Show This Wizard Again Next Time Outlook Starts check box.

**5. Click Next after reading the brief welcome message.**

**6. Enter your Salesforce user name and password in the appropriate boxes and then click Next.**

**7. Using the check boxes, set your synchronization options to sync contacts, events, and tasks.**

You may also select the direction in which you want data to flow.

**8. Click Next.**

In addition to optionally associating your e-mails in Outlook to contacts and leads, you may also select another object to tie with your e-mail, such as Accounts or Opportunities.

9. **For this example, select the Accounts check box in the Email Options screen and then click Next.**

If you want to set more advanced options, the screen that appears tells you where to go.

10. **Click Next.**

It's time to start using Connect for Microsoft Outlook.

11. **Read the screen that appears so that you can understand how you choose which items you want to sync.**

12. **Click Finish.**

### ***Backing up your data***

Synchronizing is tricky, especially if you're in a large organization with potentially complex sharing rules or if the system has a lot of old data (more on that in Chapter 23). We always recommend backing up the data from your offline tool before your initial synchronization.

Use the menu bar in Outlook (Outlook 2010, in this case) to back up your data prior to synchronizing for the first time.

To back up your data, follow these steps:

1. **Open Microsoft Outlook.**
2. **Choose File⇨Import and Export.**  
The Import and Export Wizard opens.
3. **Select the Export to a File option in the list box and then click Next.**
4. **Select the Personal File Folder (.pst) option in the list box and then click Next.**
5. **Select a folder to export (Calendar, Contacts, or Tasks) from the Personal Folders list that appears and then click Next.**
6. **In the Save the File As field, enter a new location and filename and then click Finish.**
7. **Repeat Steps 2–6 for each folder (Calendar, Contacts, and Tasks).**



If your company plans to synchronize your calendars with Outlook, make a habit of synchronizing daily to keep your activities up to date.



If you discover that you accidentally deleted records in Salesforce while synchronizing, you can go to your Recycle Bin and restore those records within 30 days from the date you deleted the records.

## *Working offline*

In today's world of hotspots and Wi-Fi, it's hard to imagine ever being untethered from the Internet. Still, on those occasions when you can't get connected, you can use Force.com Connect Offline and hardly notice the difference. Force.com Connect Offline is a downloadable application that you access through a browser, and it has the same look and feel as its online big brother. Like a briefcase, Force.com Connect Offline allows you to carry a set of your Salesforce information and also synchronize your various records. Before you can run Force.com Connect Offline, you need to install the application, configure the Briefcase, and then update it when you run it the first time. Choose Setup⇨Personal Setup⇨Desktop Integration⇨Force.com Connect Offline to install the application and then configure the Briefcase.



Force.com Connect Offline is included in the Salesforce Enterprise and Unlimited Editions, and it's available at an additional charge for Professional Edition.

## *Importing Your Contacts*

One of the keys to making Salesforce productive for you from Day 1 is to get your contacts into the system. If your contacts exist primarily in Microsoft Outlook, you might be better off synchronizing your data. Otherwise, Salesforce provides easy-to-use wizards that help you import contacts and accounts. See Chapter 5 for the details on importing, and see your administrator if your data goes beyond the limits of the import wizard. (For example, if you have historical activity linked to contacts, you can't import those records by using standard wizards.)

# Part II

# Keeping Track of Customer Relationships

The 5<sup>th</sup> Wave

By Rich Tennant



## *In this part . . .*

**T**he usefulness of Salesforce is directly related to the quality of the data you enter into it. Just like any database, you have to take an active role in creating and maintaining records to ensure that your business can operate efficiently. Some key objects are the focal point to customer relationship management (CRM) and it's critical that you are familiar with them.

In this part, you find out how to manage your customer data. We discuss logging all activity with these customers to ensure a complete perspective. We explain what Chatter is, and how your sales, marketing, and customer service organizations can benefit from it. You discover configuration changes you can make to custom tailor Salesforce to work for your business.

## Chapter 4

# Managing Accounts

---

### *In This Chapter*

- ▶ Understanding the account record
  - ▶ Entering accounts
  - ▶ Organizing account lists
  - ▶ Using the account related lists
  - ▶ Keeping your accounts up to date
- 

**W**ho are your customers? What do you know about them? What are their top compelling business problems? If you have trouble answering any of these questions, pay close attention to this chapter. In this chapter, we discuss how to use Salesforce to manage your accounts.

In Salesforce, an *account* is a company that you do business with, or have done business with previously. Accounts can include all types of companies — customers, prospects, partners, and even competitors. Among the top reasons why companies implement any customer relationship management (CRM) tool is that they need a centralized place where they can store account data, to prevent themselves from searching all over the place for critical customer information. With Salesforce, you can keep all your important account information in one place so that you and your team can apply that knowledge to sell more and keep customers happy. For example, if you work for a pharmaceutical company, you can use the accounts area to manage your territory of hospitals, clinics, and top offices and capture everything from call reports to business plans.

In this chapter, we describe all the ways you can use accounts to manage and track companies. First, you need to get your important company lists into Salesforce and organize them according to the way that you work. Then, you can find how out to make the best use of the account record to profile your companies. Finally, you can discover how to capitalize on the account related lists to gain a 360-degree view of your customers and ensure that no one drops any balls.

## Getting Familiar with the Account Record

You use an *account record* to collect all the critical information about the companies with which you interact. That account record is supported by other records (contacts, opportunities, cases, activities, and so on) that collectively give you a complete view of your customer. From this vantage point, you can quickly take in the view from the top, but you can also easily drill down into the details.

Here's a short list of valuable things you can do with accounts:

- ✓ Import and consolidate your lists of target accounts in one place.
- ✓ Enter new accounts quickly and maintain naming consistency.
- ✓ Create parent/child relationships that describe how companies' divisions or subsidiaries relate to each other.
- ✓ Realign sales territories.
- ✓ Segment your markets with ease.
- ✓ Eliminate paper-based business planning.
- ✓ Assign account teams to better serve your customers.
- ✓ Track your top customers and de-emphasize non-strategic ones.
- ✓ Define the movers and shakers within an account.
- ✓ Devise schemes to beat your competitors.
- ✓ Manage your channel partners.

## Understanding standard fields

An account record comprises fields that make up the information on a company that you're tracking. A record has two modes:

- ✓ **Edit:** You can modify fields.
- ✓ **Saved:** You can view the fields and the account's related lists, which are located below the record fields.

An account record also comes preconfigured with a set of fields commonly used for account management. Most of the standard fields are self-explanatory, but in the following list, we highlight certain terms that warrant greater definition:



- ✔ **Account Owner:** This required field identifies the person in your organization who owns the account. An account record has only one owner, but many users can still collaborate on an account.
- ✔ **Account Name:** This required field represents the name of the company you want to track.
- ✔ **Account Site:** The Account Site field goes hand in hand with the Account Name field when you're distinguishing different physical locations or divisions of a company. This field, although not required, is very important if your company sells to different locations of a customer with decentralized buying patterns. For example, if you sell mattresses to HappyDaze Hotels but each HappyDaze Hotel buys independently, this field is useful for classifying different sites.
- ✔ **Type:** This is one of the fields on an account record that classifies the relationship of an account to your company. The Type field consists of a drop-down list of values, which can prove critical if you want to differentiate types of companies. For example, if you work for a software company that uses value-added resellers (VARs) to sell and service your products, you might want to select Reseller as one of your drop-down list values.
- ✔ **Rating:** Use this drop-down list to define your internal rating system for companies that you're tracking. Salesforce provides default values of Hot, Warm, and Cold, but you can replace these with numbers, letters, or other terms based on how you want to segment companies.



See Chapter 21 for instructions on customizing picklists like the Type and Rating fields.

## *Customizing account fields*

Using standard fields on an account record gives you a simple way to collect basic profiles on companies. To get the most out of your account record, though, think about how you and your company define a target customer. For example, if you're selling corporate healthcare plans, you might want to know certain information about each of your target companies: number of employees, number of people insured, level of satisfaction, and so on.

If the fields on your account record can answer these four questions, that record has a solid foundation:

- ✔ What attributes describe your target customer?
- ✔ What are the important components of your account plan?
- ✔ Is a company's infrastructure important to what you sell?
- ✔ What information, if you had it, would help you sell to a company?

If you find your account record lacking relevance to your business, write down fields that you want and then seek out your system administrator to add them to customize your account record. (See Chapter 21 for the how-to details on building fields, rearranging your layouts, and other design tricks.) Bottom line: You can have greater success with accounts if you focus on your customer.

## *Creating and Updating Your Accounts*

Before you can begin using Salesforce to manage accounts, you must get the account records into Salesforce. In the following sections, we show you how to get started and then how to update saved records.

### *Adding new accounts*

The best way to enter a new account is to use the Create New drop-down list located on the sidebar of the home page. From this drop-down list, you get a clear picture of the account fields that are most important to your company. To create accounts by using the Create New drop-down list, follow these simple steps, starting with searching for whether this account already exists.



Before adding an account (or any other record, for that matter), always search for it first. You might not be the only person to have worked with a particular company. By searching first, you avoid creating duplicate entries, you can potentially profit from prior history on an existing account, and you don't waste time chasing accounts that don't belong to you. (Although we know this *never* happens.)

Follow these steps to add a new account:

- 1. Enter the name of the account that you want to create in the Search tool on the sidebar, and then click the Go button.**

A Search Results page appears with a list of records that match your query. If you see records that match particular account or lead records, don't throw in the towel yet. Click links listed in the Name columns to drill into the details and see whether the account is being worked. Consult with your sales manager if you have questions.

- 2. If you don't get any results, select Account from the Create New drop-down list on the sidebar.**

The Edit mode of a new account appears, as shown in Figure 4-1.

**Figure 4-1:**  
Complete  
the account  
fields.

### 3. Fill in the fields as much as you can or as required.

At a minimum, you must complete the Account Name field. Try to provide as much detail as possible to make this new account record valuable for your selling objectives. You can make this data as simple as basic phone and address information, or as detailed as account segmentation data, such as type, industry, annual revenue, and so on.



When creating account records, strive for accurate and consistent spelling of the corporate name. Your customer database is only as good as the data being entered into the system. As a best practice, look up and use the name of the company from a reliable source (for example, Dun & Bradstreet, Hoover's, or the company name as displayed on its corporate Web site). For suggested naming conventions, go to the salesforce.com Community Web site (<http://success.salesforce.com>) and search for "naming convention" to see more ideas and documents from customers.

### 4. When you're done, click one of the following buttons:

- *Save:* The Account detail page appears, in which you can click the Edit button at any time if you need to modify information on the record.
- *Save & New:* You save the current account record and automatically open a new, blank account record in Edit mode.

A link to the first Account appears in your Recent Items list in the lefthand sidebar.



If you have an existing spreadsheet of companies that you want to import into Salesforce, you can use an import wizard tool and avoid the manual entry. See Chapter 5 for how-to details on importing accounts and contacts.

## *Updating account fields*

In the course of working with your accounts, you inevitably collect pertinent information that you want to save directly in the account record. Every time you capture important data on your account, remember to update your record by following these steps:

- 1. Enter the name of your account in the Search tool on the sidebar and then click the Go button.**

A Search Results page appears.

- 2. Click the desired link in the Account Name column to go to your account.**

The Account detail page appears.

- 3. Click the Edit button on the account record.**

- 4. Update the fields as necessary, and then click Save.**

The account reappears in Saved mode, and the fields you edited have been changed.

## *Organizing Your Accounts*

When you have all or a portion of your accounts entered in Salesforce, you can begin to organize them to suit the way that you sell.

In the following sections, we cover how to use views and other tools from the Accounts home page to provide greater focus for you and your sales teams. We also show you an important feature of the account record that allows you to create parent/child relationships between accounts. Then, for even more robust organization of your account information, check out Chapter 18 for specifics on how to use standard and custom account reports.

## *Using account views*

An *account view* is a list of accounts that match certain criteria. When you select a view, you're basically specifying criteria to limit the results that you get back. The advantage of selecting a view, versus searching, is that you can use this view over and over again. On the Accounts home page, Salesforce comes preset with several predefined views including

- ✔ **All Accounts:** All the account records entered into Salesforce. Depending on how your company set up your security model, you might not see this view or its results.
- ✔ **My Accounts:** Just your accounts.
- ✔ **New This Week:** Accounts created this week that you have sharing rights to view.
- ✔ **Recently Viewed Accounts:** Accounts that you recently viewed.

To try out a predefined view, follow these steps:

1. **On the Accounts home page, click the down arrow of the View drop-down list.**

You see the four options that we mention in the preceding bulleted list as well as other choices that might have been created for you.

If your screen doesn't change when you select an option from the View drop-down menu, click the Go button to update the page.

2. **Select the My Accounts view.**

If you've already entered or imported account records, a list page appears, showing accounts that you own. Salesforce lays out the list with six standard columns that correspond to commonly used account fields, plus an Action column from which you can quickly modify a record.

3. **Click a column header to sort the list page.**

For example, if you click the Billing State column header, the list page sorts by state in alphabetical order. Click the Billing State column header a second time to toggle the sort to reverse alphabetical order.

4. **Access any account by clicking its link in the Account Name column.**

The Account detail page appears.

5. **(Optional) To edit the account, click the Back button on your browser and click the Edit button on the same row as the account you selected in Step 4.**

The account record appears in Edit mode, allowing you to make changes to the data.

If you create an account in error, click the Del link on the same row as the account you selected in Step 4 to send the Account to the recycling bin.



## *Creating custom account views*

If you want special lists for the way that you manage your accounts, build custom views. For example, if you're a new business sales rep who focuses solely on California telecom companies and always researches the prospect's Web site before calling, creating a custom view can help you be more effective because you can build your list of target accounts, define columns, and use that view over and over again.

To build a view from scratch, follow these simple steps:

- 1. On the Accounts home page, to the right of the View drop-down list, click the Create New View link.**

The Create New View page appears.

- 2. Name the view in the View Name field.**

For our fictitious California telecom example, you might call the view California Telco Prospects.

- 3. Select the appropriate radio button, depending on whether you want to search All Accounts or just My Accounts.**

- 4. (Optional) Filter by additional fields.**

A basic criteria query is made up of three elements:

- *Field*: Select a field on which to search. One example is the Type field.
- *Operator*: Select an operator for your filter. That sounds complicated, but it's easier than you might think. Taking our example, you'd select Equals from the drop-down list.
- *Value*: In the third field, type the value that you want in the filter. For our example, you'd type **Prospect** because, for this example, you go after only new business.

- 5. Select the columns that you want displayed.**

Although Salesforce's preset views take common fields, such as Phone and Billing State/Province, you can display any of the account fields that you're permitted to see on your custom list page. In our example, you'd add another column for the Website field.

- 6. Decide whether you want others to see your custom view.**

This choice might not be available to you. If it is, select the appropriate option, depending on whether you want to share your view with others. If you choose limited accessibility, use the two list boxes to select which users can see the view.

### 7. When you're done, click Save.

A new view appears based on your custom view criteria. If you don't get all the results you anticipated, you might want to recheck and refine the search criteria. For example, if your company has a habit of using postal abbreviations (NY) or the full spelling for the State field (New York), this habit impacts results.



By default, each filtering criteria for your List View is joined together with AND parameters. If you want to get fancy with your search criteria, click the Advanced Options link to use a combination of AND and OR filters.

## Reassigning account ownership

After you set up your accounts in Salesforce, you might need to give them to the right people. Part of organizing your accounts is getting them into the right hands. You might even want to reassign an account to someone else if that account is in another rep's territory.

### Reassigning a single account

If you're just reassigning an account on a case-by-case basis, you can transfer ownership directly from an account record. Go to the detail page of an account that you want to reassign and follow these steps:

1. **To the right of the Account Owner field, click the Change link (which appears in square brackets).**

The Ownership Edit page appears, as shown in Figure 4-2.

Ownership Edit Help for this Page

**MK Partners**

This screen allows you to transfer an account from one user to another. When you transfer ownership of an account, the new owner will also gain ownership of the following records related to the transferred account:

- all roles and open activities for this account owned by you
- all contacts with the account owned by you, including all related roles and open activities owned by you
- all opportunities (including closed opportunities) if you select the Transfer closed opportunities checkbox (shown below) within the account owned by you, including all related roles and open activities owned by you

Note that completed activities will not be transferred.

The new owner might need to edit sharing.

---

**Select New Owner** + Proposed Information

Transfer this account: MK Partners

Owner:

Transfer open opportunities owned by the existing account owner

Transfer closed opportunities

Transfer open cases owned to the existing account owner

Transfer closed cases

Send Invitation Email

**Figure 4-2:**  
Reassign  
a single  
account.

2. Click the **Lookup** icon to open the **Search for a User** window and find the user you're assigning the account to.
3. Select the appropriate check boxes to determine whether and how associated records change ownership.
  - *Transfer Open Opportunities Not Owned by the Existing Account Owner*: Changes the owner of any open opportunities on this account.
  - *Transfer Closed Opportunities*: Changes the owner of all closed opportunities on this account.
  - *Transfer Open Cases Owned by the Existing Account Owner*: Changes the owner of any open cases on this account.
  - *Transfer Closed Cases*: Changes the owner of all closed cases on this account.
  - *Send Notification Email*: Notifies the new account owner by e-mail.
4. When you're done, click **Save**.

The account record reappears, and the Account Owner field changes to the assigned user.

### *Reassigning multiple accounts at the same time*

Over the course of managing accounts and sales people, you'll probably need to quickly and efficiently transfer multiple accounts at the same time. For example, a sales rep leaves the company, and accounts need to be moved immediately to someone else.



If you commonly realign account territories, Salesforce transfer tools can make this task a piece of cake. Depending on the method used to carve up territories, plan ahead by customizing and then populating fields that define territories. For example, if you segment by market cap and industry, those account fields should be filled in. Administrators can then mass-transfer accounts to new owners.

To mass-transfer accounts, follow these steps:

1. Click the **Accounts** tab on the home page to go to the **Accounts home page**.
2. Click the **Transfer Accounts** link in the **Tools** section.

The Mass Transfer Accounts Page Wizard appears.
3. Fill in the **Transfer From** and **Transfer To** fields. (Use the **Lookup icons**, as needed.)

You can transfer accounts to or from any user.



**4. Select the appropriate check boxes to determine whether and how associated records change ownership.**

**5. Specify the search criteria in the drop-down lists and fields.**

For example, if you want to transfer all accounts located in California to a new rep, you can use *Billing State contains California, CA* as your search criteria.

**6. Click the Find button.**

The search results appear at the bottom of the resulting page.

**7. Select check boxes in the leftmost column to select all or a portion of the accounts for transfer, and then click the Transfer button to complete the process.**

The Mass Transfer Accounts page reappears, minus the records that you transferred.

## *Building parent/child relationships*

If you sell into different locations or divisions of a company and you're currently challenged by how to keep this information organized, use account hierarchies to solve your problem. In Salesforce, you can link multiple offices of a company together by using the Parent Account field on an account record. And you can create multiple tiers to the hierarchy if your customer is organized that way.

To establish parent/child relationships, follow these steps:

**1. Create accounts for the parent and subsidiary companies.**

See the section "Adding new accounts," earlier in this chapter if you need help with this step.

You can skip this step if the accounts are already created. However, you might want to type a term such as **Headquarters** or **HQ** in the Account Site field to signify which account is the parent.

**2. Click the link in your Recent Items list in the lefthand sidebar for the subsidiary account (a *child account*) that you want to link and then click Edit.**

The record appears in Edit mode.

**3. To the right of the Parent Account field, click the Lookup icon.**

A pop-up window appears, containing a Search field and a list of recently viewed accounts.





If you see the parent account in the results, skip to Step 5.

4. **Search for the parent account by typing the name of the account in the Search field and then clicking Go.**
5. **From the list of results, click the name of the company to select the parent account (as shown in Figure 4-3).**

The pop-up window closes, and your selection appears in the Parent Account field.

**Figure 4-3:**  
Select a  
sample par-  
ent account.

The screenshot shows a 'Lookup' window with a search bar containing 'Salesforce.com' and a 'Go' button. Below the search bar is a table with the following data:

Account Name	Account Site	Owner Alias	Type
Salesforce.com	HO	Miaul	
Salesforce.com	330 N 10th	Miaul	Technology Partner

6. **(Optional) To further denote the child account, use the Account Site field.**

Some companies use city, state, country, division, and so on, depending on how they organize their accounts. For example, if Big Box Office Supplies, Inc., has locations in Dallas and Atlanta, you could type the city into the Account Site field for each child account so that you can tell which is which.

7. **Click Save.**

The Account detail page appears.

8. **To view the account hierarchy, click the View Hierarchy link to the right of the Account Name field on the record.**

An Account Hierarchy list page appears, and like other lists, you can click an item to go to a specific account.

## *Performing Actions with Account Related Lists*

Fields on an account record are useful for storing important data specific to a company. But where do you go to capture all the critical interactions and relationships when you're working an account? To keep track of these details, use the related lists located on the Account detail page.

Many of the actions on account related lists are common to other modules. For example, major modules, such as Accounts, Contacts, Opportunities, and Cases, all have related lists for Open Activities, Activity History, and Notes & Attachments. Instead of being redundant, we point you to Chapter 7 for details on using related lists to track tasks and calendar events. In the following sections, we describe certain related lists that are unique to the account record.

## *Defining contact roles*

Many sales reps do a great job of collecting business cards for contacts within an account, but this action alone doesn't get them closer to a sale. Contacts and their titles often don't tell the whole story about decision makers and the chain of command within an account. To use contact roles in Salesforce, your administrator must proactively reveal this related list on the account record — you can find details on how to do this in Chapter 21.

To better define the buying influences on an account, go to an account record and follow these steps:

**1. Review your records in the Contact related list.**

If important contacts are missing, add them first, which we describe in Chapter 5.

**2. Click the New button on the Contact Roles related list.**

The Account Contact Role page appears.

**3. Type the name of a contact in the Contact field and then click the Lookup icon.**

A pop-up window with your search results appears.

**4. Find the correct contact:**

- *The contact is part of the search results.* Click the link for that contact's name.
- *Your search doesn't find the contact.* Refine your search, or click the New button to create the contact record and then select the contact you find or create.

After you select the contact, the pop-up window disappears, and the Contact field is filled in.

**5. Select Correct Role from the Role drop-down list.**

The default roles are strategic, rather than mere job titles. People's strategic roles can change in every deal. If the right role for your contact doesn't appear, advise your system administrator to edit the roles.

Many companies match these roles with their particular sales methodology identifiers.

6. **Select the Primary Contact check box if the contact is your primary contact; then click the Save button or the Save & New button.**
  - *Save:* The Account detail page reappears, and your contact appears on the Contact Roles related list for that account's record.
  - *Save & New:* A new Account Contact Role page appears, and you can associate another contact to a role immediately.

## *Displaying an account's opportunities*

Over the course of managing an account, you'll hopefully uncover specific opportunities to sell that company your products or services. You can use the Opportunity related list to quickly perform the following tasks:

- ✓ Stay aware of all open opportunities that you and your team are pursuing on an account.
- ✓ Add new opportunities and link them automatically to the account.
- ✓ Edit and delete opportunity records with a single click.
- ✓ Gauge the progress of an account by quickly seeing all open and closed opportunities at their various sales stages and amounts.

See Chapter 10 for the scoop on adding, linking, editing, deleting, and managing opportunities.

## *Viewing cases*

Account health is much more than measuring the growth of sales for a customer. After selling, sales reps want to stay informed of customer service issues so that they can continue to keep their customers satisfied, resolve issues early, receive warnings about potential landmines, and track potential upsell opportunities. Use the Cases related list to view all the open and closed customer service cases that relate to an account.



If your company relies on a channel sales team to manage partners, distribute leads, and bring in revenue, consider using Salesforce Partners, which is available in Enterprise and Unlimited Editions for an extra charge. This partner relationship management (PRM) application gets your partners on board with using Salesforce to manage all the details of their activities with your company and your joint deals. Go to Chapter 12 for a more in-depth discussion.

## Maintaining Your Account Database

The more you use Salesforce for account management, the more important it is to maintain it over time.

In the following sections, we show you simple tools for keeping your account database up to date.

### Merging duplicate records

Try as you might to avoid it, the best sales reps and teams still create duplicate account records. For example, say you're a new business rep, and you create and manage an account record for Dependable Electric. Unbeknownst to you, an account manager in the cubicle right next to you has been tracking all his customer activity on an account called DE. Three months later, you both have logged multiple activities, contacts, and other records. Do you throw up your hands in despair and continue working with independent records, delete your co-worker's record, or fight it out? The Salesforce merge tool for accounts can help you avoid the loss of friendship and data.



To merge account records, you must be the Account Owner of the records, the Account Owner's manager (that is, the Account Owner must be subordinate to you in the Role Hierarchy), or a system administrator.

To merge accounts, follow these steps:

1. **Click the Accounts tab to go to the Accounts home page.**
2. **In the Tools section, click the Merge Accounts link.**  
Step 1 of the Merge My Accounts Wizard appears.
3. **Type the name of the accounts that you need to merge and then click the Find Accounts button.**

A Search Results page appears with a list of records.



If you don't see one of the accounts you're looking for, rename it with a name similar to its duplicate. For example, you'd rename DE to Dependable Electric Dupe to merge it with the other Dependable Electric account.

4. **Select the check boxes for a maximum of three records that you want to merge, and then click Next.**

The Step 2 page of the tool appears, containing a side-by-side comparison of the selected account records, as shown in Figure 4-4.

Step 2. Select the values to retain Step 2 of 2

Select the values that you want to retain in the merged record. Highlighted rows indicate fields that contain conflicting data. The Master Record selected will retain read-only and hidden field values. The oldest Created By date and user will be retained in the merged record.

Note: All related records including any notes, attachments, and activities will be associated with the new merged record.

Master Record	salesforce.com [Select All]	salesforce.com [Select All]
Account Owner	Matt Kaufman	Matt Kaufman
Account Name	salesforce.com	salesforce.com
Account Number		
Account Site		
Type		
Industry		
Annual Revenue		
Rating		
Phone	<input checked="" type="radio"/> (415) 901-7000	<input type="radio"/> (877) 776-5727
Fax	<input checked="" type="radio"/> (415) 901-7002	<input type="radio"/>
Website	<input checked="" type="radio"/> http://www.sforce.com	<input type="radio"/>
Ticker Symbol		
Ownership		
Employees		
SIC Code		
Billing Address	<input checked="" type="radio"/> The Landmark @ One Market San Francisco, CA 94097 US	<input type="radio"/>
Shipping Address		
Customer Priority		
Number of Locations		
Active		
SLA		
Description		
Created By	Matt Kaufman, 3/15/2010 2:01 PM	Matt Kaufman, 6/2/2010 10:18 PM
Last Modified By	Matt Kaufman, 6/2/2010 10:17 PM	Matt Kaufman, 6/2/2010 10:18 PM

**Figure 4-4:**  
Select  
values while  
merging  
duplicate  
accounts.

**5. Compare the information and select the appropriate radio buttons to select the values that you want to retain.**

At the top of each column, you can also choose to keep all the values from one record by clicking the Select All link.

**6. When you finish reviewing, click the Merge button.**

A pop-up window appears, prompting you to verify that you want to perform the merge.

**7. Click OK.**

The account record reappears. Any records from related lists are kept. A history of your merge is recorded in the Account History related list on the account record.

## *Deleting account records*

If you (or a subordinate) own accounts that need to be deleted, you can delete them one at a time by using the Delete button on the account records. The one caveat here is that some companies remove your permission to delete accounts altogether. If this is the case, or you want to delete

many accounts at one time, consult with your system administrator. System administrators are the only users in your company who have the ability to mass-delete records. (Kind of startling to realize that geeks have all the power, isn't it?)



When deleting records, remember that you're also deleting associated records. So, if you're deleting an account, you can potentially be removing contacts, activities, opportunities, and other records linked to the account. You can rectify a mistakenly deleted record within 30 days of your deletion by retrieving it from your Recycle Bin, but be careful before deleting records.





## Chapter 5

# Developing Contacts

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### *In This Chapter*

- ▶ Customizing the contact record
  - ▶ Creating and updating contacts
  - ▶ Putting your contacts in order
  - ▶ Viewing Contact related lists
  - ▶ Building organizational charts
  - ▶ Resolving duplicate contacts
- 

**I**f you've been selling for more than a few years, you probably have a big golden Rolodex overflowing with business contacts. And if you're just starting out, you probably wish you had one. But how much do you know about those contacts? Where do you keep track of the personal and business information that you've collected throughout the years?

Salesforce enables you to plan, manage, and capture all the important interactions that you normally have with your prospects and customers. Just imagine the value that keeping this shared information in one place can have for you and your teams.

By using the Contacts section in Salesforce, you can effectively keep all your most important contacts together in one place, easily link them with the accounts they work for, gain insight into the relationships between contacts, and capture the critical personal drivers of each contact that are so key to your selling success.

In this chapter, we discuss how to use Salesforce for your contact management needs. You can also find out how to build your contact database by adding information directly or by importing your existing files. Later in the chapter, we describe how to organize your contacts lists so that you can quickly find the people you want to talk to. We also show you how to maintain the integrity of your contact data by editing contact records, merging duplicate records, and deleting old records. These tasks allow you to start putting your contacts to work for you.

## Understanding the Contact Record

A *contact record* is the collection of fields that consists of the information about a person you do business with. Unlike a business card in your Rolodex or a lead record in Salesforce, however, a contact is linked to an account. Like other records, the contact record has two modes: an *Edit* mode, in which you can modify fields, and a *Saved* mode, in which you can view the fields and the contact's related lists (which are located below the fields).

A contact record comes preconfigured with a standard set of fields commonly used for contact management. The exact number isn't important because your company might add or subtract fields based on the way you want to track your contacts. Most of the standard fields are self-explanatory, but in the following list, we highlight a few fields that are less obvious:

- ✓ **Contact Owner:** This is the person in your organization who owns the contact. A contact has only one owner, although many users can still collaborate on a contact.
- ✓ **Reports To:** This lookup field on the contact record allows you to organize your contacts hierarchically.
- ✓ **Lead Source:** This drop-down list defines where you originated the contact.
- ✓ **Email Opt Out:** This check box reminds you whether a contact should be e-mailed.
- ✓ **Do Not Call:** This check box reminds you whether a contact can be called.



Privacy is a big issue with companies and the selling tactics they employ. Nothing damages a customer relationship more than a contact who's contacted when he or she has asked not to be. To protect your contacts' privacy, be diligent about the Email Opt Out and Do Not Call fields. Users in your company should always check the contact record before calling or marketing to a contact.

## Customizing Contact Information

After you complete the standard fields, you never have trouble knowing where to reach your contacts. Whether they take your call is another question, though.

## Precision target marketing

A leading telecommunications provider wanted to improve the coordination between sales efforts and marketing programs. Over the course of a year, the provider's marketing department planned numerous campaigns that included direct marketing, tradeshow, customer case studies, client outings, and so on. In the past, marketing managers wasted

substantial time trying to extract contact information from the sales teams. By customizing the contact record to collect important personal and business information, and then training sales reps to update custom fields on contacts in Salesforce, the company has realized substantial savings in time and better productivity in targeted marketing programs.

Think about all the personal or professional information that you commonly collect on your best contacts. For example, if Michael Jordan is your client, you might like to know that he loves golf and fine cigars and has three kids. And he's always driven to be number one.

Ask yourself these questions while you customize your contact record:

- ✓ What professional information is important in your business (for example, prior employers or associations)?
- ✓ What personal information can help you build a better relationship?
- ✓ How do you evaluate the strength of your relationship with the contact?
- ✓ What probing questions do you commonly ask all contacts? (For example, what are their current initiatives and business pains?)

We always advise keeping it simple, but if any specific fields are missing, write them down and seek out your system administrator. (See Chapter 21 for the how-to details on building fields and other design tricks.) Salesforce can help you remember important details about your contacts, and you can use that information to build better relationships.

## *Entering and Updating Your Contacts*

Your contact database is only as good as the information it contains, so Salesforce has multiple ways for you to get your contacts into the system. You can either start from scratch and manually create new contact records, or if you already have contacts on a spreadsheet or in another tool, you can use Salesforce's simple wizard to import your contacts within minutes. In the following sections, we discuss quick and simple ways to get started and how to update records.

## Entering new contacts

Because contacts belong to accounts, the best, most reliable way to create contact records is by starting from the relevant Account detail page. From the Account detail page, you can then add a contact by using either the Create New drop-down list on the sidebar or the New button on the Contacts related list. The result is the same in both situations, and Salesforce automatically pre-fills the Account lookup field. By doing this, you can always find your contact, and your contact's activities appear in a list on the overall Account detail page.

To create contacts by using this best practice, follow these steps:

1. **Search for the account, and then click the appropriate Account Name link on the Search Results page.**

The Account detail page appears.

2. **Click the New button on the Contacts related list.**

The Edit mode of a new contact appears, as shown in Figure 5-1.

Figure 5-1 shows the 'Contact Edit' page for 'Ms. Edna Frank'. The page is titled 'Contact Edit' and includes a 'Help for this Page' link. Below the title, there is a warning: 'Contacts not associated with accounts are private and cannot be viewed in other users or included in reports.' The page is divided into three main sections: 'Contact Information', 'Address Information', and 'Description Information'. Each section has a 'Save', 'Save & New', and 'Cancel' button. The 'Contact Information' section includes fields for Contact Owner, First Name, Last Name, Account Name, Title, Department, Reports To, Lead Source, Phone, Home Phone, Mobile, Other Phone, Fax, Email, and Address. The 'Address Information' section includes fields for Mailing Street, Other Street, Mailing City, Other City, Mailing State/Province, Other State/Province, Mailing Zip/Postal Code, Other Zip/Postal Code, Mailing Country, and Other Country. The 'Description Information' section has a large text area for the Description.

**Figure 5-1:**  
Completing  
fields on  
a contact  
record.

**3. Fill in the fields as much as you can or as required.**

The Account field is pre-filled with the account you were working from.

**4. When you're done, click one of the following buttons:**

- *Save*: After you click the Save button, the Contact detail page appears. On this page, you can click the Edit button whenever you need to modify information on the record.
- *Save & New*: Clicking this button saves the current contact information and automatically opens a new, blank contact record in Edit mode.

## *Importing your contacts and accounts*

If you already have contact lists from another database (for example, Excel or ACT!), you can use the Import Wizard to create multiple contact records in Salesforce and be done in no time. The Import Wizard is located in the Tools sections of either the Accounts or Contacts home page.



When you import accounts, you can choose to import just companies and their associated information, or you have the option to import companies and their related contacts in one action. Which route you take really depends on your existing data and what you want in Salesforce.

To import your contacts and accounts automatically, follow these steps:

**1. Click the Contacts tab to go to the Contacts home page, and then click Import My Accounts & Contacts under the Tools section.**

The Import Wizard for My Contacts page appears, which includes four steps for importing records, plus helpful hints.



If you're a system administrator for Salesforce, you can click the Import My Organizations Business Accounts & Business Contacts link, which allows you to import substantially more records at one time with different owners. If you're an administrator, that link also appears under the Tools sections of the Accounts or Contacts home pages. What's the big deal? Most users can import 500 records at a time, but if you're a system administrator, you can import 50,000 at a time and leap over tall buildings in a single bound.

**2. In your existing contact tool or file, compare your current fields with the fields in Salesforce. Add fields to the account or contact records by customizing Salesforce.**

If you can map all the information you currently have to fields in Salesforce, move on to Step 3. If you have to add fields to Salesforce to match fields, see Chapter 21.)

### 3. Export your file.

You might have contacts and accounts in an existing database, such as ACT!, Goldmine, Microsoft Access, or Outlook. Most systems like these have simple tools for exporting data into various formats. Select the records and the fields that you want to export. Then export the file and save it in a comma-separated values format. If your accounts are already in spreadsheet format, such as Excel, just resave the file in that format.

### 4. Review and prepare your data in Excel.

Refine your accounts and contacts before bringing them into Salesforce or clean them up after the import; it's up to you. Some sales reps prefer to make changes on a spreadsheet first because they're more accustomed to spreadsheets.

When preparing your import file, keep these points in mind:

- *Enter your column headers in the first row.* We recommend renaming column headers to be consistent with the field names in Salesforce. For example, you could rename the Company field from Outlook as Account Name.
- *To import data for your entire company,* add a column for Record Owner to signify who should own the record in Salesforce. Otherwise, as the person importing, you own all the records from the file.
- *To differentiate locations of a company* (for example, Sony in Tokyo versus Sony in New York), add a column for Account Site and update the rows on your file to reflect the different sites.
- *Link accounts in the import file* by adding columns for Parent Account and Parent Site and by filling in fields as necessary to reflect the hierarchy.
- *Make sure that a Type column exists and that fields are filled to correspond to the types of companies you track* (customers, partners, prospects, competitors, and so on).
- *For files with more than 500 rows, divide the master file into smaller files to fit the Import Wizard's size limitation.* You have to repeat the Import Wizard for each of the smaller files.
- *To import contacts and accounts at the same time,* add a column for the billing address fields if those addresses are different from the contacts' mailing addresses.

For more hints on importing, click the Help and Training link and check out the Training and Support information in Salesforce by searching for the keyword *Importing*.



When you're figuring out how to import data into Salesforce, we recommend testing an import with five or so records first, just to make sure that you know what you're doing. After importing the test data, review your new records to make sure that they contain all the information you want brought in. Delete the test records, refine your import file, if necessary, and then run through the final import.

**5. After preparing the file, click the Start the Import Wizard link.**

The Select the Source step appears in a new window.

**6. Use the radio buttons to select the source and click Next.**

You can't go wrong if you select the Other Data Source option, but the other choices are helpful because Salesforce knows how Outlook and ACT! fields map to Salesforce. When you click Next, the Upload the File step appears.

**7. Click the Browse button, shown in Figure 5-2, to locate and select your import file.**

If you've already prepared your file, then you've done the heavy lifting on this page. Salesforce pre-fills the character coding of your file based on your Company Profile. If you have questions about character coding in general and what your company uses, ask your administrator.

**8. Select the contact matching type and click Next.**

If you want Salesforce to avoid importing duplicate records, choose whether you want a duplicate contact to be identified by matching name or e-mail. If a contact record with the matching criteria already exists in Salesforce, Salesforce updates that record with the information in your file.

Step 2 of 7: Upload the File Import Wizard

Most applications (including Goldmine, Palm Desktop, Microsoft Excel, Microsoft Access and FileMaker) will allow you to export contact data into a **comma delimited text file (.csv)**. Salesforce.com will import contacts from a .csv file. In addition, salesforce.com will create accounts for all the companies referenced by your contacts. The exact steps for each application are different but should follow the same general approach:

1. Launch the application and view the contact list
2. Select the **Save As...** or **Export...** menu option, usually from the **File** menu
3. Follow the directions to save the file in a **Comma Separated Values** or **CSV** format
4. You can optionally read the CSV File into Excel to edit the data or filter the contacts to import
5. Now choose the file to import into salesforce.com.  
**Note:** It may take a few minutes to upload your file, depending on the file size and your connection speed
6. The selection below is set to a default value. Override this default value only if your import file has a different character encoding.
7. Contact Matching Type  Name (Recommended)  
 Email

**Figure 5-2:**  
Loading the  
contact file.



When you click Next, the Map Contact Fields step appears.

If you see an additional request to choose an account record type for import (right after the Contact Matching Type options), check with your system administrator to find out which one you should choose. This advanced option is available only for Enterprise and Unlimited Edition users. The default type usually is the right answer for most common uses, but better to be safe than sorry.

### 9. Map the contact fields between your file and Salesforce, and when you're done, click Next.

If you're importing only accounts, skip this step. Otherwise, just go through the fields and use the drop-down lists to select the field from the file that you're importing, which maps to the Salesforce field, as shown in Figure 5-3. (The fields are repeatedly listed in each of the drop-down lists.) When you click Next, the Map Contact Phone and Address Fields step appears.

Step 3 of 7: Map Contact Fields Import Wizard

In the list below, select the field in your import file that should be imported into each salesforce.com field. Once you have finished, click **Next**.

[< Back](#) [Next >](#)

**Contact Information**  
You should import into either the **Contact Full Name** or **First Name and Last Name**, but not both.

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Contact Full Name: -- none selected --		Lead Source: -- none selected --	
First Name: First Name (col 0)		Reports To: -- none selected --	
Last Name: Last Name (col 1)		Birthdate: -- none selected --	
Salutation: -- none selected --		Assistant's Name: -- none selected --	
Title: -- none selected --		Description: -- none selected --	
E-mail Address: -- none selected --		Contact Note: -- none selected --	
Department: -- none selected --		Email Opt Out: Not Accessible	
Fax Opt Out: Not Accessible			

**Contact Custom Fields**

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Level: -- none selected --		Language: -- none selected --	

**Additional Contact Information**  
Note: You can specify up to two additional contacts per record. Alternatively, you can move these contacts into separate records in your import file and restart the import wizard.

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
2nd Contact Full Name: -- none selected --		3rd Contact Full Name: -- none selected --	
2nd Contact Phone Number: -- none selected --		3rd Contact Phone Number: -- none selected --	
2nd Contact Phone Ext.: -- none selected --		3rd Contact Phone Ext.: -- none selected --	
2nd Contact Title: -- none selected --		3rd Contact Title: -- none selected --	

[< Back](#) [Next >](#)

**Figure 5-3:**  
Mapping  
the contact  
fields.



Mapping fields is simply the process by which you associate a field from one database to a field in another database so that your data appears in the right fields. For example, if you're importing your contacts from MS Outlook, you want data from the field called Company in Outlook to map to the field called Account Name in Salesforce. Take your time when making the mappings. Pay attention to which screens are for account-specific fields and which screens are for contact-specific fields.



**10. Map the contact address and phone fields and then click Next.**

Again, you can skip this step if you're importing just accounts. Map the relevant fields just as you did in Step 9. When you click Next, the Map the Account Fields step appears.

**11. Map the account fields; when you're done, click Next.**

You map these fields just like you did in Steps 9 and 10, with two exceptions: Now you're mapping account data, and you can choose to update existing data. For example, if you already have an account record for Microsoft Corporation in Salesforce, and you entered no other information except the Account Name, you can update that existing account record with the Import Wizard and avoid creating a duplicate account record. So if you want to append existing records, select the Overwrite existing account values check box at the top of this page. When you click Next, the Map Account Phone and Address Fields step appears.

**12. Map account phone and address fields and then click Next.**

No surprises here; by now, you should be a pro. When you click Next, the Map Extra Import Fields step appears.

**13. Map any extra import fields, and when you're satisfied, click the Import Now button.**

This step basically warns you about problems with the data or lets you know about fields that haven't been mapped. If you discover an error, you can click the Back button and refine your mapping, or even close the wizard so you can improve your import file. You might have to start over, but at least you avoid importing bad or incomplete data.

When you click Import Now, an Importing page appears to confirm that your import is in progress.

**14. Click the Finish button and later check the records that you imported.**

Salesforce sends you an e-mail after it successfully imports your file. To check your import, click the Accounts tab to go to your Accounts home page. Use the Recent Accounts section drop-down list to select the Recently Created option, and a list of the accounts that were recently created appears. Click the link for an account that you just imported to double-check that the information is accurate.

If you're importing both accounts and contacts, scroll down on an applicable account to its Contacts related list and verify that all the right contacts are linked from your import file. Click into a specific contact record and check to see that the information matches your import file.

## *Updating contact fields*

While you work with your contacts, you might need to modify their contact information. To update a contact, follow these steps:

- 1. Type the name of your contact in the Search tool and click Go.**

A Search Results page appears.

- 2. Click the desired Contact Name link.**

The Contact detail page appears.

- 3. Like with any record, double-click any field that has a pencil icon to its right to edit that field.**

If a field doesn't have an icon at the right of the field, click the Edit button at the top of the record to make changes. A padlock icon means you can't edit that field at all.

- 4. Update the fields as necessary and then click Save.**

The Contact detail page reappears.

## *Cloning an existing contact*

If you want to add a contact that's similar to an existing record, cloning can save you key strokes and time. To clone a contact, go to the existing contact and follow these steps:

- 1. Click the Clone button at the top or bottom of the contact record.**

A new contact record in Edit mode appears. All the information is identical to the previous record.

- 2. Edit the information on the new contact record, where appropriate.**

Pay attention to what's pre-filled because you want to avoid inaccurate information on the new contact record.

- 3. When you're done, click Save.**

You created a new contact without altering your existing contact.

## *Organizing Your Contacts*

When you have all or a portion of your contacts entered in Salesforce, you can begin to organize them to suit the way you sell.

In the following sections, we show you how you can use views and other tools from the Contacts home page to provide greater focus for you and your sales teams. We also show you an important feature of the contact record that lets you build powerful organizational charts (also called *org charts*) for contacts of an account. (See Chapter 18 to find out how to use standard and custom contact reports.)

## *Using contact views*

A *contact view* is a list of contacts that match certain criteria. When you select a view, you're specifying criteria to limit the results that you get back. The advantage of using a view versus searching is that you can use the view over and over again. For example, if you like to send a card on a contact's birthday, you can benefit from a preset view for this month's birthdays.

The Contacts home page comes with several predefined views, including

- ✓ **All Contacts:** Provides a list of all the contact records entered into Salesforce. Depending on the way your company has set up your security model, you might not see this view or its results.
- ✓ **Birthdays This Month:** Generates a list of contacts whose birthdays land in the current month (assuming you collect that information).
- ✓ **New This Week:** Generates a list of contacts that have been created since the beginning of the week.
- ✓ **Recently Viewed Contacts:** Allows you to look at a list of contacts that you've recently viewed.

You use a predefined contact view in exactly the same way that you use an account view (as we mention in Chapter 4) or the predefined view for any other record.

## *Creating custom contact views*

If you want special lists for the way that you track your contacts, we recommend building custom views, just like you do for any other record. (For an example of how to create a custom view for accounts, see Chapter 4.) For example, if you sell medical equipment, and once per month you like to call your contacts who are dentists, you can create a view to simplify your work.

## Developing Organizational Charts

Having 20 contacts associated with an account is great, but you might not be any further along in understanding the pecking order. In practice, sales reps have been building org charts to strategize on accounts ever since someone thought up org charts, but often, the charts resided on whiteboards and PowerPoint presentations. (And whiteboards are tough to lug around.) By using the org chart feature in Salesforce, you can quickly define the reporting structure for your contacts and use that structure to more easily identify your relationships with your customers.

To build an org chart in Salesforce, follow these steps:

**1. Add all the contacts for an account.**

See the section “Entering and Updating Your Contacts,” earlier in this chapter, for details about adding records.

**2. Go to the contact record for a person low on the totem pole and then click the Edit button.**

The record appears in Edit mode.

**3. Type the name of the contact’s boss in the Reports To field and then click the Lookup icon to the right of the field (it looks like a little magnifying glass).**

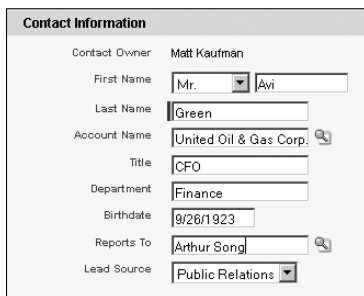
A pop-up window that contains search results appears.

**4. Select the correct contact or refine your search until you can select the right contact.**

The pop-up window disappears, and the Reports To field is pre-filled with the selected contact, as shown in Figure 5-4.

**5. Click Save.**

The Contact detail page appears.



The screenshot shows the 'Contact Information' form in Salesforce. The fields are as follows:

Field	Value
Contact Owner	Matt Kaufman
First Name	Mr. Avi
Last Name	Green
Account Name	United Oil & Gas Corp.
Title	CFO
Department	Finance
Birthdate	9/26/1923
Reports To	Arthur Song
Lead Source	Public Relations

**Figure 5-4:**  
Selecting  
the boss.

**6. Click the View Org Chart link that appears to the right of the Reports To field on the contact record to display the hierarchy.**

An Org Chart list page appears, and like other lists, you can click a link to go to a specific contact.



Some sales reps run into certain challenges based on the way they create the org charts in Salesforce. One such challenge is gaps; you just might not know or even care about the entire reporting structure. By getting creative and building placeholder contacts, you can avoid pitfalls. For example, if you sell to both the business and the technology side of a customer, create a contact record called IT Organization and another called Business Organization and then align your contacts accordingly. This technique also works well for *orphans*, where you know one contact in a department and don't want to leave the contact out of the org chart for the entire account.

## *Performing Actions with Contact Related Lists*

Fields on a contact record are useful for capturing the essential contact information for a person. But where do you track and review all the interactions that you've had with a contact? To add, edit, delete, and keep track of this detail, use the related lists located on the Contact detail page.

Turn to Chapter 7 if you want to find out all the wonderful things you can do with related lists to keep track of activities with people and the companies they work for. However, if you're looking for typical ways that sales people use Contact related lists, go over the following list of features:

- ✓ If you want to track, edit, or close your pending activities for a contact, use the Open Activities related list. In this list, you can click the New Task button to set up a to-do item or click the New Event button to schedule a calendared activity. See Chapter 7 for the how-to details on these activities.
- ✓ If you want to view what has happened with a contact to date, review the Activity History related list. Sales reps commonly use Log a Call to capture details for a call taking place or after the fact. Go to Chapter 8 for the ins and outs of sending e-mail.
- ✓ If you send HTML e-mail from Salesforce, you can use the HTML Email Status related list to see how your contact is responding to your e-mail. By using this list, you can send an e-mail, find out whether your contact is viewing your e-mail, and see how quickly he or she views a message after you send it.



- ✓ If you want to store attachments that relate to a contact, use the Notes & Attachments related list. Click the Attach File button to store important documents, such as confidentiality agreements or contact resumes.

Although you can click the New Note button to jot down your comments and even keep them private, we recommend that you track your comments in tasks instead. Using tasks to track your activities allows for better timestamping, editing, and reporting on your interactions with your contacts. See section in Chapter 7 for more information on tasks.

- ✓ If a contact brings you a new deal, you can click the New button on the Opportunities related list and automatically associate your contact with the opportunity record. See Chapter 10 for details on creating opportunities.
- ✓ To keep track of or edit your contact's participation in campaigns, use the Campaign History related list. And if you want a contact to be part of an active campaign, click the Add Campaign button. For example, if Marketing sends out invites to a customer event, you can use the Add Campaign feature to efficiently add a contact to the list of recipients. See Chapter 13 for more tips on campaigns.

## *Merging Duplicate Records*

Your once-tiny Rolodex is now a gigantic contact database because you're managing more contacts and covering more territory. However, don't let those large piles of data walk all over you. You have to show that data who's boss. In this section, we show you simple tools that can help you keep your contact database in line and up to date.

Try as you might, sometimes you come across duplicate contact records in the system. Instead of deleting one or several of the duplicate records and potentially losing valuable information in those records, you can use Salesforce to merge contact records easily.



To merge contact records, the contacts must be on the same account and you must be the Contact Owner of the records, the Contact Owner's manager (that is, the Contact Owner must be subordinate to you in the Role Hierarchy), or a system administrator.

If you accidentally merge two contacts, you can always undelete the merged contact from the Recycle Bin.

To merge contacts, go to the account record that has a duplicate contact and follow these steps:

1. On the Contact related list, click the Merge Contacts button, as shown in Figure 5-5.

Step 1 of the Merge My Contacts Wizard appears.

**Figure 5-5:**  
Merging  
duplicate  
contacts.



Contacts		New Contact	Merge Contacts	Contact Help
Action	Contact Name	Title	Email	Phone
1001 [Del]	Leanne O'Rourke	SVP, Technology	leanne@sales.com	(212) 942-8800
1002 [Del]	Paul O'Rourke	CEO	paul@sales.com	(212) 942-8800
1003 [Del]	Shella Zwickler	SVP, Protection	shella@sales.com	(212) 942-8800
1004 [Del]	Walter Zwickler	CEO	walter@sales.com	(212) 942-8800

2. Type the name of the contact that you need to merge in the field to the left of the Find Contacts button and then click the Find Contacts button.

A Search Results page appears, displaying a list of records.

3. Select a maximum of three records to merge and then click Next.

In Salesforce, you can merge only three records at a time. The Step 2 page of the tool appears with a side-by-side comparison of the selected contact records.

4. Compare the information and select the radio buttons for the values that you want to retain.

At the top of each column, you can also choose to keep all the values from one record by clicking the Select All link.

5. Click Merge.

A pop-up window appears, prompting you to verify that you want to perform the merge.

6. Click OK.

The contact record reappears, and associated records from related lists are now linked on the contact record.





## Chapter 6

# Collaborating with Chatter

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### *In This Chapter*

- ▶ Configuring Chatter
  - ▶ Finding Chatter
  - ▶ Updating your profile
  - ▶ Keeping your status up to date
  - ▶ Following people and relevant objects
  - ▶ Joining groups
- 

**E**very one of us has been the new guy (or gal) at a company at some point in our lives. Even if you received a formal orientation and a review of the organizational chart (a luxury that you shouldn't take for granted), remember still having to meander around finding that person who has the answers? Or maybe you're an old-timer who is extremely busy but always willing to answer a newcomer's questions because you remember how overwhelming it was when you first started.

Organizations possess huge amounts of varying types of knowledge: formal and informal, documented and verbal, current and outdated. Very rarely is knowledge shared in one centralized location. Even when a company is pretty diligent about communicating, the sheer volume of information and the speed with which current information gets outdated can be overwhelming. Using Chatter bridges the gap between sharing useful information and information overload by allowing you to communicate quickly with colleagues as well as keep track of progress and updates on topics as they happen.

In this chapter, we discuss how Chatter works to eliminate all that information chaos by providing a central place where Salesforce users can publish status updates, post and respond to questions, and see recent activity on records to easily collaborate with each other in a private and secure environment. We walk you through setting up your profile, updating your status, and using groups and feeds so that your sales, marketing, and customer service organizations can work together even more effectively.



At the time of this writing, Chatter is available for no additional charge for Group, Professional, Enterprise, and Unlimited Editions. However, because each profile, group, and status update is a record in Salesforce, they add to your data and storage usage numbers. Salesforce has also set some limits on the number of posts and comments that are stored in Salesforce (and for how long). It's usually not an issue, but always check with your account executive for more details.

## *Preparing to Use Chatter*

When you get a new car, it's tempting to just drive away as soon as you're handed the keys, but it might serve you better to take a few minutes to read the manual. The same holds true for Salesforce Chatter. By spending a little extra time preparing, you can ensure a successful implementation of this powerful feature and ensure your standing as a Salesforce hero in your company. Here are some key actions that we recommend for every Chatter implementation:

- ✔ **Get key executives of your organization to use Chatter.** Engage executives early, help them update their profile (more on that later), and show them how easy it is to follow other employees. They'll love the communication-improvement aspect of Salesforce Chatter and will encourage their employees to post regular updates.
- ✔ **Follow just the objects you need.** If you have a popular Web site, you might get hundreds of leads a day in Salesforce. Seeing updates on them all is information overload. Other types of records (such as Products) probably won't change that often and thus not warrant tracking via Chatter. As part of your preparation, you have to determine which objects make sense to track for your business.
- ✔ **Prepare for the change.** Your organization might not have processes in place to provide routine updates to management. People naturally resist change, especially change that requires them to inform others what they're doing. When you put together your communications introducing Salesforce Chatter, be sure to focus on the timesaving aspect and reassure people that it's not a surveillance tool used by Big Brother.
- ✔ **Lead by example.** Show users how to find and follow your profile. Then be sure to post status updates about the work you're doing so they can get a feel for how it works. You can even ask them questions via Chatter to encourage participation.

- ✔ **Establish basic posting guidelines.** Your colleagues might already be used to an informal posting functionality of social networking sites, but before they post personal information in Chatter, set some basic guidelines. Here are some to get you started:
  - Keep Chatter updates related to business matters.
  - Don't post anything you wouldn't want seen by your CEO, HR department, or peers.
  - Never post confidential information that isn't widely available elsewhere in your organization.
  - Post updates often to keep others informed of your accomplishments.
- ✔ **Provide an FAQ.** Education is the key to success for any Salesforce implementation. Training and documentation not only improve adoption but also ensure that users make fewer mistakes. The same holds true for implementing Chatter.

An FAQ list is an easy-to-produce document that your users can reference. In addition to the guidelines above, you can include sample status updates (good and bad ones) and instructions on common tasks. See Chapter 8 to find out how you can create a reusable e-mail template that includes your FAQ and guidelines.
- ✔ **Continue adoption.** When new employees join your company, be sure to send them your FAQ and Chatter guidelines. This will ensure that they continue the success of your Chatter implementation and prevent any embarrassing mistakes.



To even further its usefulness, you might want to add new functionality to Salesforce Chatter. Fortunately, there is a long list of Chatter-based apps on the AppExchange ([www.appexchange.com](http://www.appexchange.com)) to choose from. Here are a few you might want to check out:

- ✔ **Chatter New Alerts:** Sends Google Alerts to Chatter
- ✔ **CraigsForce+Chatter:** Adds internal classified listings functionality
- ✔ **Email2Chatter:** Allows user to interact with Chatter via e-mail
- ✔ **Chatter Graph:** Adds visualizations to Chatter

## Turning On Chatter

Chatter isn't a feature automatically enabled straight out of the box (so to speak). Before your company can begin using Chatter, your system administrator has to make some minor changes to your Salesforce configuration.

## Activating Chatter

The first step in using Chatter is activating it in Salesforce Setup. Follow these steps:

**1. Choose Setup⇨App Setup⇨Chatter⇨Settings.**

The Chatter Settings page appears.

**2. Select the Enable check box.**

The Email Notification Settings section appears.

**3. Keep the Allow Emails check box selected.**

Doing so enables users to receive e-mail notifications whenever someone they're following updates their Chatter feeds.

**4. Click Save.**

Chatter requires the New User Interface Theme in Salesforce. See Chapter 20 for instructions on how to enable it.



## Updating your tab configuration

To make it easier for users to work with Chatter, you can add the Profile, People, and Groups tabs to your existing Salesforce Apps. These tabs then appear as part of the Chatter app, giving users easy access.

To add the Chatter tabs to your existing app, follow these steps:

**1. Choose Setup⇨App Setup⇨Create⇨Apps.**

**2. Click the Edit link for the app you want to update.**

The Custom App Edit page appears, as shown in Figure 6-1.

**3. From the Available Tabs list, select the tabs that you want to add to your app. Then click the Add button to move them to the Selected Tabs list.**

We recommend displaying the following tabs:

- *Profile*: View your personal Chatter feed, update your profile, and change who you're following.
- *People*: Search for and subscribe to other users' Chatter feeds.
- *Groups*: Create, search, and join Chatter Groups to collaborate with your co-workers.

#### 4. Click Save.

The Apps page reappears, and you can repeat for other apps. The added tabs are now displayed at the top of Salesforce for you to select anytime.



**Figure 6-1:**  
Select fields  
to follow in  
Chatter.

## Understanding Key Chatter Terms

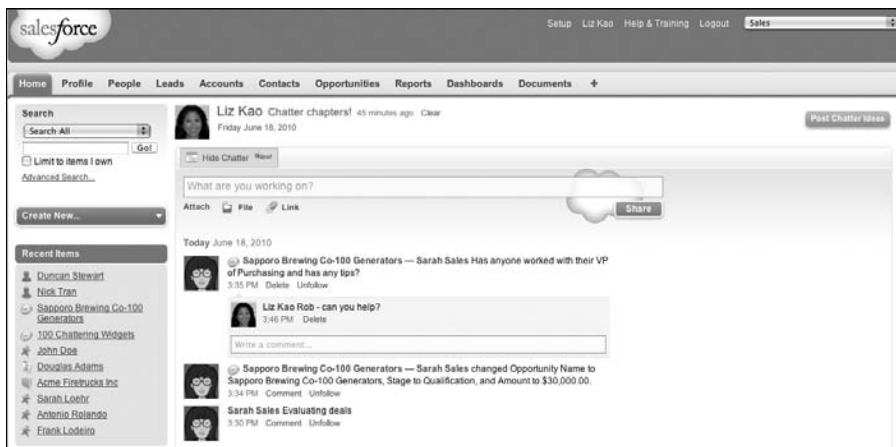
The following are some Chatter-related terms to familiarize yourself with:

- ✓ **Profile:** A page about a specific person in your company, who is using Salesforce. A profile can include the person's name, a short bio, their contact information, and a photo, for example.
- ✓ **Feed:** A Chatter feed shows a chronological list of activities performed by persons or records within your company's Salesforce instance.
- ✓ **People:** A collection of people within your company that have Chatter profiles.
- ✓ **Following/Unfollowing:** The act of following (or unfollowing) a person or record to see (or no longer see) their feed updates on your Home page. These can include comments, posts, and updates to certain fields within a record. Other people in your Salesforce organization can also choose to follow you.
- ✓ **Status:** A type of update you make about yourself that's added to your feed for others to see. Because it's called a *status*, usually you are providing an update to something perhaps directly tied to a record.
- ✓ **Comment:** A response that you write based on another person's feed activity. For example, if an opportunity that people are following is finally won, your CEO could comment on the feed and say, "Congratulations, team!"

## Locating Chatter on Your Home Page

After your administrator turns on Chatter, you'll notice it at the top of your Home page when you log in to Salesforce.

As shown in Figure 6-2, after you set up your profile, Chatter shows a photo of you, your status, and a feed of status updates from others that you're following. All this occurs in the top-middle section of your Home page.



**Figure 6-2:**  
View your  
Chatter  
feed.

The rest of your Home page is still there. Your tasks, dashboard, and calendar have just moved down the screen. You can always click the Hide Chatter link right below your status to, well, hide the Chatter feed.

## Profiling Yourself

The first thing you should do when starting Chatter is update your profile. When you click your name anywhere in the Chatter feed or click the Profile tab, you're taken to your profile record. Your profile record is your work profile, displaying your profile picture, more information about yourself (your background, contact information, past roles, hobbies, and so on), a history of your status updates, co-workers who follow you, and the co-workers and Salesforce records that you follow.



Your profile is also what others see when they click your name, which means that profiles work like a company directory. Be sure you don't include any information you don't want *everyone* in your company seeing.

Follow these steps to update your profile:

**1. Click the [Your Name] link at the top of the Home tab.**

Your profile page appears, as shown in Figure 6-3.



**Figure 6-3:**  
Set your  
profile here.

**2. Click the Update Photo link to add a picture of yourself to your profile.**

The Upload Profile Photo dialog box appears.

**3. Click Browse to browse your hard drive for the image file that you want to upload.**

You can upload files up to 4MB in size that are in JPG, GIF, or PNG format.

**4. Navigate to an image on your computer and then click the Open button.**

Your image is automatically uploaded to Salesforce.

**5. In the Upload Profile Photo window, drag the resize lines around your image to crop the photo to the required size and shape, as shown in Figure 6-4.**



**Figure 6-4:**  
Crop your  
photo for  
Chatter.

**6. Click Save.**

Your profile reappears with your new photo.

**7. Click the pencil icons in the Contact and About Me sections and update those sections.**

**8. Click Save.**

## *Keeping Everyone Informed with Status Updates*

Part of what makes Chatter work is letting your co-workers — even maybe your boss — know what you're up to. In return, you can find out what they're doing. We show you how to keep your status updated as well as how to comment on others' statuses.

### *Updating your status*

Associated with your profile is your status, which is displayed after your name in Chatter, as shown in Figure 6-5. This is the current status that your followers see, and you can update this to let others know what you're working on, to ask questions, or to share files or Web site links. Its inspiration comes from status updates on Web sites, such as Facebook and Twitter, that have played an increasing role in people's personal lives. If you have a Facebook or Twitter account, you'll pick up Chatter in no time.



**Figure 6-5:**  
Displaying  
your status.

Liz Kao Creating a sales demo. 6/19/2010

To update your status, follow these steps:

**1. Click the Profile tab or the Home tab.**

Either option takes you to your latest status update.

If you're at the Home page, your Chatter feed must be showing. If it's not, click the Show Chatter link below your last status update.

**2. Type your status in the What Are You Working On? field directly below your latest status update.**

**3. (Optional) Attach a file or a Web site link to your update by clicking the File or Link icons, respectively, directly below the Status box.**

You might want to link to an interesting article you read online or upload a file with a presentation you're working on.

**4. Click the Share button to publish your update.**

Your status is updated.

**5. (Optional) Click the Delete link next to your update in your feed to remove it.**

Your status is always your most recent entry; you don't need to delete past entries. However, if you ever make a typo or post something embarrassing, you can always delete that status entry and pretend like it never happened.



## *Commenting on statuses*

When you're following people, you start seeing their status updates in your Chatter feed on the home page. Chatter allows you to add comments to statuses, thus creating and managing multiple conversations in an organized fashion.

To add a comment to someone's status, follow these steps:

**1. Locate the status in the Chatter feed.**

**2. Click the Comment link below the status.**



Alternatively, put your cursor in the Write a Comment field and start typing.

3. **Type your comment in the Write a Comment field.**
4. **Click the Comment button.**

Your comment appears indented below the original update, as shown in Figure 6-6.

**Figure 6-6:**  
Comment on  
a status.



## Choosing What to Follow

Before you can follow anything, your administrator needs to enable Chatter on certain objects. *Objects*, most simply explained, are types of records. They're the nouns that are at the top of your Salesforce page (like Accounts), that you can click and that then look like a highlighted tab. (For a review of how to navigate the default objects in Salesforce, read Chapter 2.)

Your administrator and executive stakeholders should decide which objects to first turn on for following: typically, the one or two objects your Salesforce users collaborate on the most.

## Configuring your Chatter feeds

After you determine which objects need to be followed, you can enable Chatter for those objects:

1. **Choose Setup → App Setup → Chatter → Feed Tracking.**

The Feed Tracking page appears, as shown in Figure 6-7.

2. **Click the name of an object in the Object list on the left side.**

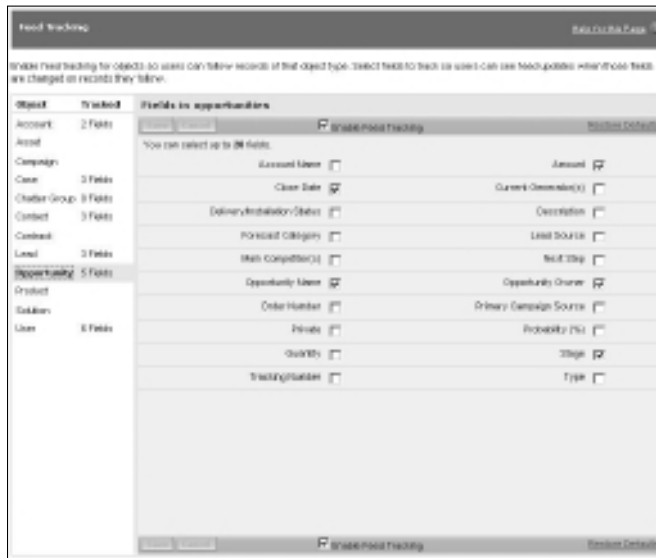
The Fields in Categories for that object appears.

3. **Select the Enable Feed Tracking check box.**

#### 4. Select each check box for the fields you want to track with Chatter.

Select fields that others will want to be notified about when a change occurs: for example, Name, Type, and Status.

#### 5. Repeat for other objects and then click Save.



**Figure 6-7:**  
Select fields  
to follow.

## Following people

When you first start Chatter, the status updates feed will be empty because you're not following anyone. In this section, we show you how to follow people in your organization.



Follow the people in your company working on things that interest you or that affect what you're doing so you can join the conversation. All the people you can follow are listed on the People tab of the Chatter app.

To follow people, follow these steps:

#### 1. Click the People tab from the Home page.

The People page appears. If you can't find the People tab, check with your administrator.

## 2. Find people to follow using one of these methods:

- *Find someone specific.* Type that name (such as your CEO) into the Quick Find search bar. The list of people automatically updates while you're typing. Look for key executives, peers, and other movers and shakers within your company.
- *Browse for names.* Scroll down the first page and click Next to see the next page of names.
- *Search for people by the first letter of their last name.* Click any of the letters above the list of people.

You can follow as many as 500 users. However, be picky about whom you follow to help narrow down all the updates you'll be getting in your feed.

By default, people are listed by Last Name, First Name order, but you can also sort by when they last updated their status or whether you're following them by clicking the column labels. Figure 6-8 shows a list of people sorted by those who most recently updated their statuses.

When you click a person's name, you go to their Profile page.

## 3. After you locate someone you want to follow, click the Follow link that appears in their row.

You're now following that person, and the link toggles to Unfollow in case you wish to unfollow them in the future. By default, the followed person receives an e-mail notifying them that you're following them, so they can likewise choose to follow you — or not. Their status feed now shows up on your Home page as long as you have Chatter showing (refer to Figure 6-2).



Full Name	Status Last Updated	Following
 Daniel Lajoie	Today at 9:17 AM	<input checked="" type="radio"/> Follow
 Sarah Smith Sales Manager	Yesterday at 2:38 PM	<input type="radio"/> Unfollow
 Patrick Vincent	Yesterday at 5:43 AM	<input type="radio"/> Follow
 Paul Cheung	Two Days Ago at 10:04 AM	<input type="radio"/> Follow
 Hana Kim	Two Days Ago at 9:30 AM	<input type="radio"/> Unfollow
 A. Anthony SFOC Technical Analyst	Two Days Ago at 8:20 AM	<input type="radio"/> Follow
 Julie B.	Two Days Ago at 12:08 AM	<input type="radio"/> Follow

**Figure 6-8:**  
Sort people  
by status  
update.

Only internal users of your company's Salesforce instance can see your Chatter updates, depending on where you enter that update. (Read through the earlier section for more information on how to update your status.) As far as having outsiders or Google see your updates, you're safe because Chatter uses the built-in privacy and security functionality in the Salesforce native Force.com platform. Internal users can see anything you post from your Home or Profile page.

## *Following feeds*

One of the key differentiators of Chatter, as compared with other social networking sites — or other services that attempt to bring social networking into the businessplace — is that you can also follow non-human things in your Salesforce database. Sounds crazy, right? This feature means that you can follow specific opportunities, accounts, contacts, leads, price lists, cases, and any changes that are made to those records. You can even create or follow groups, focused on a single competitor, region, or vertical. Being able to choose what things you want to stay in the loop about makes the Chatter feed highly relevant to what you need to be successful at work.

To follow a feed, click the Follow link under the record's name on the record's detail page.

## *Following specific records*

Sometimes you're more interested in all the updates to a specific record than from a specific person. Salesforce Chatter allows you to follow updates to key records so that you can always know what's happening on your biggest account or with a strategic opportunity. You automatically follow your own records, but you can choose to follow other user's records by clicking the Follow link at the top of each record.

Whenever someone changes a field in an opportunity, for example, you know about it. If you're a sales manager, you can choose to follow a strategic opportunity that one of your reps has been toiling over. The moment she updates that Opportunity Stage field to a Closed-Win, it appears in your feed. If you have key executives following that opportunity, too, they can provide comments that amount to a virtual high-five for all to see.

For example, you can follow a specific opportunity (see Figure 6-9). Your profile photo appears as a follower of this object on the record's page so others will know you're interested in this record.



**Figure 6-9:**  
Follow an opportunity.

You can also add comments to specific records, just like you can with people you follow. (See the earlier section, “Following people.”) They appear in your Chatter feed on your Home page and on the Chatter feed on the record’s page. For example, if people are following a huge opportunity, you could comment, “I used to work with the CFO there. Let me know what information you need to help in the negotiation.”

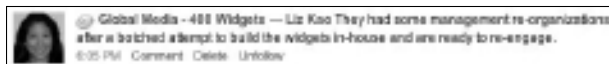
Again, this fosters collaboration and communication while keeping discussions relevant to your business. Figure 6-10 shows a comment for an opportunity and how Chatter displays it on the Home page linked to the specific opportunity.

We talk more about how to follow different records in their respective chapters. For example, in Chapter 8, we show you how to follow activities, and in Chapter 10, we show you how to follow opportunities.



Only users with Read access to a record will be able to see any posts you make on that record. To read more about permissions, visit Chapter 20.

**Figure 6-10:**  
Share information about an opportunity.



## Being Part of a Group

Similar to finding people to join, you look for groups to join. By following a group’s feed, you can collaborate with a specific subset of people within your company on a regular basis.



Posts made to a private Chatter group can be seen only by members of the group.

## Joining a group

To find a group to join, follow these steps:

- 1. Click the Groups tab.**

A list of Chatter Groups appears.

If you see an X by a group, you're already a member. Clicking the X allows you to leave a group.

- 2. Use the search bar to look for specific group names.**

While you type, the list automatically changes to show the results of your search.

If you don't find a group that you want to join, create a new one yourself. See the next section on how to create a group.

- 3. Click a group's name to view the Group detail page.**

This provides more details about the group.

- 4. Click either of these two links:**

- *Join:* Join a public group.
- *Ask Owner:* Ask to join a private group. You go to the group owner's profile, where you ask the owner for permission to join.



## Creating a group

Communication is key when working in teams. With Chatter Groups, you can set up private feeds where team members can discuss their work outside their normal Chatter feed. This is extremely useful for sensitive projects to ensure that online conversations remain secure. You can set up public groups as well for less-confidential discussion.

To set up a Chatter group, follow these steps:

- 1. Click the Groups tab on the Chatter app.**

The Groups home page appears, listing existing groups.

- 2. Click the New Group button.**

The New Group page appears, as shown in Figure 6-11.

**Figure 6-11:**  
Create a  
new Chatter  
Group.

3. Type the name of your group.
4. Enter a description to further distinguish it from other groups.
5. Set the Group Access as Public or Private:
  - *Public*: Anyone can join the group or see its feed.
  - *Private*: Only members can see and add posts to the feed.
6. Click Save.

Your new group's page appears. You can add members by clicking the Add/Remove link on the right side.

## Receiving Chatter Emails

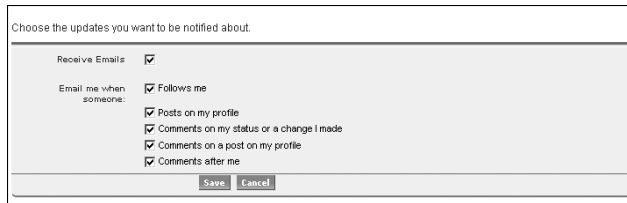
If Chatter Emails was enabled by your System Administrator when Salesforce Chatter was activated, you have the option to be notified via e-mail about whenever someone (or something) you're following has updated Chatter.

You can set your preferences as follows:

1. Choose Setup⇨My Chatter Settings⇨My Chatter Emails.
2. Select the Receive Emails check box to ensure that you receive e-mails about updates.
3. Select the appropriate check boxes corresponding to the events for which you want to be notified, as shown in Figure 6-12.
4. Click Save.



**Figure 6-12:**  
Set your  
Chatter  
Email pref-  
erences.



Choose the updates you want to be notified about.

Receive Emails:

Email me when someone:

- Follows me
- Posts on my profile
- Comments on my status or a change I made
- Comments on a post on my profile
- Comments after me

Save Cancel

## Using Chatter Effectively

Here are a few ideas on how your company can benefit from Chatter if some people are reluctant to get onboard:

### ✔ Help sales sell smarter.

- Follow key accounts and strategic opportunities.
- Ask others for references to help you close a specific deal.
- Create a group to team up to win against the competition.

### ✔ Market more effectively.

- Get feedback on updated presentations and other marketing materials by attaching them to a status update.
- Share noteworthy press mentions.
- Follow leads to learn more about which types of prospects are converting.

### ✔ Improve customer service.

- Receive and provide help on cases.
- Discuss potential workarounds and technical solutions in a private group.
- Collaborate on creating the most succinct answer to common customer issues.



## Chapter 7

# Managing Activities

---

### *In This Chapter*

- ▶ Looking into Salesforce activities
  - ▶ Making new activities
  - ▶ Managing activities
  - ▶ Changing activities
- 

**A**ctivities in Salesforce are scheduled calendar events and tasks. In many ways, the events and tasks in Salesforce are just like the activities you use in Microsoft Outlook or any other productivity application. You can schedule events on your calendar, invite people to meetings, book a conference room, and add tasks to your to-do lists so that you don't forget to get things done.



You can synchronize Salesforce with Outlook so that you don't have to input activities twice. (See Chapter 3 to install and configure Salesforce CRM Connect for Microsoft Outlook.)

However, Salesforce takes activities further: You can easily link events and tasks to other related records, such as accounts, contacts, and so on. You can view activities both in the context of a relevant item (for example, all activities that relate to an account) and as a stand-alone from your calendar and task lists in the comfort and convenience of your home page. And, if you're a manager, Salesforce allows you to stay up to speed on your users and how they're spending their time.

By managing activities in Salesforce, you can better coordinate with your team, quickly assess what's going on in your accounts, and focus on the next steps to close deals or solve issues.

In this chapter, we first show you how to schedule events and create tasks. Then, we cover how to find and view activities, both from your home page and from specific record pages, such as accounts and opportunities.

## Reviewing Activities

You can use activities in Salesforce to track all the significant tasks and events involved in acquiring, selling, and servicing customers. Think about all the actions that you and your teams perform to accomplish your job — meetings, calls, e-mails, letters — and imagine the value of all that information in one place at your fingertips. You can have such a place in Salesforce, and you can easily link your activities together in an organized fashion.

Salesforce features several types of activities that you can access from the Open Activities and Activity History related lists displayed on many of the major records, including accounts, contacts, leads, opportunities, and cases. In this chapter, we focus on events and tasks, but in the following list, we briefly explain all the various activity records you can track in Salesforce:

- ✔ **Task:** Essentially a to-do. Use this activity record as your online yellow sticky note. It's an activity that needs to be completed, but it doesn't have a specific time or duration associated with it. For example, if you know that you're supposed to follow up with a contact by sending a written letter, you can create a task such as Send Letter.
- ✔ **Event:** A calendared activity. An event has a scheduled time, date, and duration associated with it. Examples of common events are Meetings, Conference Calls, and Tradeshows.
- ✔ **Log a Call:** A task record of a completed call. Use Log a Call during or after a call to make sure that you capture important details. For example, use it when a contact calls you and you want to record comments or outcomes from the discussion.
- ✔ **Mail Merge:** Logs an activity for a document that you've mail merged. With Mail Merge, you can quickly merge common Microsoft Word templates with customer information and track those activities in Salesforce.
- ✔ **Send an Email:** Logs an activity for an e-mail that you send to a contact or a lead. You can send e-mails from Salesforce or Microsoft Outlook, and capture that information directly inside Salesforce.
- ✔ **Request Update:** Sends the person associated with the activity a request to update his/her contact information. This helps you keep your contact information, well, updated.



Salesforce's online suggestion box, also known as Salesforce Ideas, allows you and a community of other Salesforce users within your company to post suggestions on any topic for others (other licensed users of Salesforce within your company) to vote on and discuss. This sharing of ideas is a valuable way for your company to mine feedback from your employees that could result in product or service innovations. Ideas are ranked based on popularity over

time, and you can group Ideas into multiple subject areas. You can also set up this sort of action for your customers (see what Starbucks did at <http://mystarbucksidea.force.com/ideaHome>).

## Creating Activities

Before you can begin managing your time or activities in Salesforce, you need to know the easiest and most reliable way to add events and tasks.

### Creating an event

When you want to schedule activities that have a particular place, time, and duration, use event records. By using event records, you and your sales teams can keep better track of your calendars.

You can create an event from your home page, its calendar views, or the Open Activity related list of a record. The best method to choose often depends on what you're doing. If you're carving out meetings on a day, add events from your calendar's Day View. If you're working on a customer deal, you might create the event from an opportunity record. The end result is the same.



If you're just getting accustomed to filling out records in Salesforce, create events from the record that's most directly associated with the event. By using this method, many of the lookup fields are pre-filled for you. So, when you save, you ensure that you can find the activity quickly because it's linked to all the right records.

To create an event from a relevant record (such as a contact or account record), follow these steps:

- 1. Enter names in the sidebar. Search for the record to which you want to link the event and click the Go button.**

For example, if you want to schedule a meeting about an account, you search for the account name.

When you click Go, a Search Results page appears.

- 2. Click a link in the Name column to go to the record you want.**

The record's detail page appears.

- 3. Scroll down to the Open Activities related list on the page and click the New Event button, as shown in Figure 7-1.**

A New Event page appears. If you created this event from a relevant record, the name of the person or the related record is pre-filled for you.

**Figure 7-1:**  
Creating an event.

Action	Subject	Name	Related To	Task	Due Date	Status	Priority	Assigned To
Edit   Ck	Present slides	Ashley James	United Oil Office Portable Generators	✓	6/21/2018	Not Started	Normal	Liz Ego
Edit   Ck	MPF Audit	Lauren Burke	United Oil Office/AM/MS	✓	6/30/2018	Not Started	High	Liz Ego

#### 4. Fill in the relevant fields.

Pay close attention to the required fields highlighted with a red bar. Depending on your company's customization, your event record might differ from the standard, but here are tips on some of the standard fields:

- **Assigned To:** Defaults to you. Use the Lookup icon to assign the event to another user.
- **Subject:** The event's subject, which appears on the calendar. Click the combo box icon. A pop-up window appears, displaying a list of your company's event types. When you click a selection, the window closes and your selection appears in the Subject field. To the immediate right of your selection's text, add a brief description. For example, you might click the Meeting link and then type **Define Requirements** to explain the event's purpose.
- **Related To:** The standard event record shows two drop-down lists that you can use to link the event with relevant records, as highlighted in Figure 7-2. The first drop-down list relates to a person — a contact or lead. The second list relates to other types of records — an account, opportunity, or case. First, select the type of record and then use the associated Lookup icon to select the desired record. For example, if you select Opportunity from the second drop-down list, you can use the Lookup icon to find a specific opportunity.

**Figure 7-2:**  
Linking the event to related records.

**Calendar** Help for this Page

### New Event

**Event Edit** Save Save & New Task Save & New Event Cancel

**Calendar Details** Required Information

Assigned To:  Location:

Subject:

Name:

Phone:  Email:

Related To:

**Description Information**

Description:

**Recurrence**

Create Recurring Series



If you use the Related To fields on activities, you'll rarely have problems finding an activity later. For example, if you sell through channel partners, you might associate a meeting with a partner contact, but you might relate the meeting to an end-customer account. When you save the event, it appears on the related lists of both records.

- *Location*: Provides you or other invitees information about where the event will take place. Examples include conference rooms, cities, and office locations.
- *Time*: Allows you to specify the time. You can use basic shorthand and avoid unnecessary key strokes. For example, type **9a** for 9:00 a.m. or **2p** for 2:00 p.m.
- *Duration*: Allows you to specify the duration of an event in hours and 15-minute intervals.

#### 5. Click Save.

The page you started from reappears, and the event appears under the Open Activities related list for the associated records. The event also appears on the home page of the user assigned to the event.

Alternatively, click the Save & New Event or Save & New Task button if you want to immediately create another activity. A new activity record appears in Edit mode.



If you're an Outlook user, Salesforce makes it easy for you to add events from Salesforce directly into your Outlook calendar. Go to an event record and click the Add to Outlook button. An Outlook dialog box appears. Review the information and then click the Save & Close button. Then check your Outlook Calendar for the meeting record.

## Using pop-up reminders

Similar to Microsoft Outlook, Salesforce triggers pop-up reminders about events at a set time before the event is scheduled to start. If you live your life daily in Salesforce and have the application constantly logged in on your machine, this feature makes sure you don't forget an important meeting with a customer.



Make sure that your browser's pop-up blocker protection is set to allow pop-ups that come from the Salesforce domain. Otherwise, if your browser has the pop-up blocker feature turned on, when you create an event, a little warning box appears every time your browser attempts to display a reminder box.

If, on the other hand, you're the type that lets pop-up reminders pile up on your computer screen, or you log in to Salesforce infrequently (what sacrilege!), you can disable this feature. Choose Setup⇨Personal Setup⇨My Personal Information⇨Reminders and clear the Trigger Alert When Reminder Comes Due check box. Remember to click Save after you finish.

## Creating a task

Some sales reps refer to tasks as *ticklers*; others call them reminders or to-dos. Whatever your favorite term, use task records when you want to remind yourself or someone else of an activity that needs to get done.

You can create a task from the My Tasks section of your home page or from the Create New drop-down list on any page within Salesforce. We use both methods, depending on whether we're planning out our weeks or strategizing about a particular account, contact, or other record.

To create a task from the relevant record, follow these steps:

1. **Enter a name in the sidebar Search tool for the record to which you want to link the task and click the Go button.**

For example, if you want to set a task to review a proposal that relates to an opportunity, search for the opportunity name. After you click Go, a Search Results page appears.

2. **Click a link in the Name column to go to the record you want.**

The record's detail page appears.

3. **Select Create Task from the sidebar or click the New Task button on the Open Activities related list of a record, as shown in Figure 7-3.**

Either way, the result is the same. A New Task page appears.

When creating tasks, go to the record that the task is most directly related to before adding the task. By taking this path, you ensure that your task is easy to find because it's automatically associated with the correct record and its account. For example, if you're creating a task to follow up on a letter to a contact, you most likely add the task from the contact record.



**Figure 7-3:**  
Creating a  
new task.

Open Activities		New Task   New Event		Open Activities Help (?)			
Action	Subject	Related To	Task	Due Date	Status	Priority	Assigned To
Call   Del	Call		<input type="checkbox"/>	8/10/2010 9:30 AM			Liz Sisk
Mail   Chk	Review.comparisons.chart	Grant Hertz Guest Portable Seminars	<input checked="" type="checkbox"/>		Not Started	Normal	Liz Sisk



#### 4. Fill in the relevant fields.

Like the event record, your fields may vary, but here are some tips on adding a task:



- *Assigned To*: Defaults to you. Use the Lookup icon to assign the task to another user.

You can choose to add multiple assignees to the task, too. Each assignee gets his or her own copy of this task. Use multiple assignees if you need to send the same task out to several people (for example, to turn in your monthly expense report). This approach doesn't act like a queuing system. If one of the assignees completes and closes his or her task, that action doesn't close or remove the open tasks belonging to the other assignees.

- *Subject*: The task's subject, which appears on the My Tasks section of the Assigned To's home page. Click the combo box icon. A pop-up window appears, displaying a list of your company's activity types. When you click a selection, the window closes and your selection appears in the Subject field. To the immediate right of your selection, add a brief description. For example, you might click the Send Letter link and then type **Introduction** to explain the task's purpose.
- *Related To*: Shows two drop-down lists that you can use to link the task with relevant records similar to the event fields. First select the type of record and then use the associated Lookup icon to select the desired record.
- *Priority*: Denotes the task's importance. High priority tasks display an exclamation mark (!) to the left of the activity on the assigned user's home page.
- *Status*: Defines the status of the task.
- *Due Date*: The date by which you expect the task to be completed. This is typically an optional field — but an important one if you want to make sure a task gets done when it's supposed to. Hovering your cursor over this field makes a calendar window pop up, and you can select a date from this calendar.

#### 5. (Optional) Select the Send Email Notification check box if you want to notify the user to whom you're assigning this new task.

You can't guarantee that every user will log in to Salesforce daily, so e-mail notifications are an effective way to make sure that tasks are delivered to the right people in a timely fashion.

#### 6. Click Save.

The page that you started from reappears, and the task displays under the Open Activities related list for the associated records. The task also appears in the My Tasks section of the home page of the user who's assigned to the task.



Make sure that you set your My Tasks view on the home page so that your tasks are included in the filter. The view defaults to Overdue, which can confuse some people when they don't see a recently created task in that area.



Always link your tasks with the relevant records in Salesforce. Otherwise, you run the risk of losing valuable customer information that might have been captured in that task.

## Logging a call

Sometimes, you perform a task and just want to log the activity after the fact. For example, a contact calls you on the phone, or you get stopped in the coffee room by your boss to talk about a customer issue. In these situations, instead of creating a task and then completing it, use the Log a Call feature.

When you click the Log a Call button, you're simply creating a task record that has a Completed Activity Status. To log a call, go to the record that the call relates to (an account or lead record, for example) and follow these steps:

1. **Scroll down to the Activity History related list and click the Log a Call button.**

The Log a Call page appears, displaying fields for a completed task at the top of the page and fields for a follow-up activity at the bottom of the page.

2. **Fill out or modify any of the fields to log the call.**

The Status field is preset to Completed, as shown in Figure 7-4.

Task Edit	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	
Task Information	
Assigned To	Lu Lan
Subject	Call
Due Date	6/11/13
Phone	(312) 586-1000
Status	Completed
Name	Contact
Related To	Account
Email	lu@salesforce.com

**Figure 7-4:**  
Logging a call.

- 3. If applicable, add another related task by filling out the fields below the Schedule Follow Up Task header.**

Although certain fields are labeled as required, the follow-up task is optional.

- 4. Select the Send Notification Email check box for the logged call (and for the follow-up task if you choose to schedule that) and click Save when you're finished.**

The detail page that you started from reappears. The call record appears under the Activity History related list. If you set up a new follow-up task, that record appears under the Open Activities related list.



Rather than using the Notes feature in Salesforce to track details of your interactions with customers and prospects, we recommend using Log a Call to record this type of information. Tasks allow for easier reporting, timestamping, editing, and viewing capabilities.

## *Organizing and Viewing Activities*

You can view your activities from the home page and from a specific record's Open Activities or Activity History related list. If you're planning your calendar, use the home page. If you're working from a particular account, contact, or other item, you can get better context on pertinent activities from the related lists on the record.

After you create (or are assigned to) activities, you probably want to view them so that you can prioritize and complete them.



On the home page, change the default view in the My Tasks section to All Open or to Today, depending on how efficient you are, so you can see all tasks that you still need to complete. The current default view, Overdue, only shows you tasks after the due date has passed, which we have found to not be many users' first choice.

If you're planning around a specific record, such as a contact or opportunity, you can view linked activities from the Open Activities and Activity History related lists located on a detail page.

The two related lists work hand in hand. An event record automatically moves from the Open Activities related list to the Activity History related list when the scheduled date and time pass. A task record remains on the Open Activities related list until its Status is changed to Completed; then, the record appears on the Activity History related list.

To view activities from a detail page, follow these steps:

**1. Open a saved record.**

The detail page of the record appears. The saved record appears at the top, and related lists are at the bottom of the page.

**2. Scroll down until you see the Open Activities and Activity History related lists.**

If you already created related activities, activity links appear in the lists.

**3. Click an item listed under the Subject column.**

The activity record appears.

## *Updating Activities*

Things happen: Meetings get cancelled, and small tasks suddenly become big priorities. With Salesforce, you can perform many of the actions that a normal time-management tool would allow you to do, including delegating activities to other users, rescheduling, editing information, deleting records, and so on.

You can do the following basic functions by clicking buttons at the top of an activity record:

- ✓ **Edit:** Update any of the fields in the record whose fields now appear, and make sure you save.
- ✓ **Delete:** Delete the record. A pop-up window appears in which you can confirm the deletion.
- ✓ **Create a Follow Up Task:** Generate a related task. A New Task page opens, pre-filled with information from the prior record.
- ✓ **Create a Follow Up Event:** Schedule a related meeting. A New Event page appears, pre-filled with information from the prior record.

## *Assigning activities*

Sometimes, you may create activities and decide to delegate them later. Salesforce lets you easily reassign tasks and events, and notify users of assignments.

To assign an activity, open the activity record and follow these steps:

1. **Click the Edit button.**
2. **Click the Lookup icon to the right of the Assigned To field.**  
A pop-up window appears, displaying a list of your Salesforce users.
3. **Use the Search field to search for the user or select the user from the list.**

After you make a selection, the pop-up window disappears, and your selection appears in the Assigned To field.

4. **(Optional) Select the Send Email Notification check box to alert the user by e-mail and then click Save.**

The activity record reappears, and the Assigned To field has been modified.

## Completing a task

When you're done with a task, you want to gladly get it off the list of things to do. You can mark a task as complete from your home page or from the Open Activities related list in which the task link is displayed.

To complete a task, follow these steps:

1. **If you're viewing the task from an Open Activities related list, click the Cls link (Salesforce shorthand for "Close") to the left of the task. If you're looking at the task on the home page, click the X link in the Completed column.**

Both links create the same result: The task appears in Edit mode, and the Status field changes to Completed. (Your company might have its own terminology for the Completed status.)

2. **Type any changes and click Save.**

Some reps update the Comments field if they have relevant new information. The detail page reappears, and the completed task now appears under the Activity History related list.



You can synchronize your activities with Microsoft Outlook, too. See Chapter 3 for more information.



## Chapter 8

# Sending E-Mail

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### *In This Chapter*

- ▶ Getting to know Salesforce e-mail fields
  - ▶ Setting e-mail options
  - ▶ Sending an e-mail
  - ▶ Delivering mass e-mails
  - ▶ Keeping an eye on e-mails after you send them
- 

**E**-mail is a fundamental method for communicating with customers, prospects, and friends. By using e-mail correctly, you can manage more sales territory and be responsive to customers. However, by not using e-mail appropriately, you can leave a bad impression or lose a client.

If e-mail is an indispensable part of your business, you and other users can send e-mail from Salesforce and track the communication history from relevant records, such as accounts, contacts, opportunities, and cases. This capability is helpful if you inherit a major customer account because you can potentially view all the e-mail interactions from a single account record.

Sending an e-mail is a cinch, and if that were all this chapter covered, we'd have summarized it in just one section. But Salesforce provides additional e-mail tools to help you better sell to, service, and wow your customers. In this chapter, we show you all the tricks and best practices for sending a basic e-mail, mass e-mailing, using templates, and tracking responses.

## *Understanding E-Mail Fields in Salesforce*

An e-mail in Salesforce is an activity record comprising fields for the message and for the people you want to keep in the loop on the message.

The e-mail record comes with standard fields that people commonly use when sending e-mail. Most fields are self-explanatory, but the following list summarizes some additional fields:

- ✓ **Related To:** Use this field to relate the e-mail to an account, opportunity, product, campaign, solution, or case record in Salesforce, depending on your edition. By completing this field, the e-mail is stored under the Activity History related list of that record. See the “Creating and sending e-mail” section later in this chapter.
- ✓ **Additional To:** Use this field to type in additional primary recipients. They don’t have to be contacts or leads in Salesforce.
- ✓ **Attachment:** Of course, you know what an e-mail attachment is, but we wanted to let you know that the size limit is 10MB per e-mail.

## *Setting Up Your E-Mail*

Before you begin e-mailing people from Salesforce, check out a couple of setup options that can save you time and headaches. In the following sections, we show you how to personalize your outbound e-mail as well as how to build personal e-mail templates for common messages that you send to people.

### *Personalizing your e-mail settings*

When you send an e-mail via Salesforce, the recipient can receive the message just as if you sent the e-mail from your standard e-mail program. The e-mail message appears as if it came from your business e-mail address, and you can use a standard signature to go with your message. And if the recipient replies to your e-mail, that reply e-mail comes right to your standard e-mail inbox. To pull this off, though, you need to personalize your e-mail settings in Salesforce.

To set up your e-mail, follow these steps:

1. **Choose Setup** ⇨ **Personal Setup** ⇨ **Email** ⇨ **My Email Settings**.

The My Email Settings page appears in Edit mode.

2. **Modify the first two required fields, as necessary, to specify the outgoing name and the return e-mail address.**
3. **Select the Yes radio button if you want to send a blind carbon copy (Bcc) to your standard e-mail inbox.**



That way, you can still keep e-mails in customer folders in your e-mail application.

#### 4. **Modify the Email Signature field.**

If you're personalizing your e-mail settings for the first time, you might notice a default signature from Salesforce. This message appears at the bottom of your e-mail in lieu of your signature. Unless you're using Personal Edition, go ahead and change it.

#### 5. **Click Save.**

The Email page under Personal Setup appears, and your settings are modified.

## *Building personal e-mail templates*

If you ask your top sales reps about sending e-mail, they'll probably tell you that they don't re-create the wheel every time they send certain messages to customers. It's a waste of their time, and time is money. Instead, they use templates and form letters to send the same message with less work.

In your standard sales process, you probably send a variety of e-mails to customers, including

- ✓ Letters of introduction
- ✓ Thank-you notes
- ✓ Responses to common objections
- ✓ Answers on competition

Although you do need to personalize a message to fit the specific details of a customer, you probably use certain effective phrases and sentences over and over again. Instead of searching for a prior message and cutting and pasting, you can create personal e-mail templates and improve your productivity.

To create a personal template, follow these steps:

#### 1. **Choose Setup** ⇨ **Personal Setup** ⇨ **Email** ⇨ **My Templates.**

An Email Templates page appears.

#### 2. **Select the My Personal Email Templates folder in the drop-down list, if it's not already set to that.**

#### 3. **Click the New Template button.**

Step 1 of the template wizard appears.

**4. Select the radio button for Text, HTML, Custom, or Visualforce to set the type of e-mail that you want to create and click Next.**

- *Text*: Uses a basic text-only template without any formatting.
- *HTML*: Uses a previously created letterhead and supports HTML formatting.
- *Custom*: Lets you paste previously created HTML code as your template.
- *Visualforce*: Uses a saved Visualforce page.

The next page of the wizard appears, and the content of the page depends on the choice you made. Using HTML is most common and has certain advantages, both from appearance and tracking standpoints, but older e-mail programs cannot receive HTML e-mail.

**5. If you select Text in the previous step, complete the template fields provided (see Figure 8-1) and then click Save.**

You can use the template only after you select the Available for Use check box.

After clicking Save, a Text Email Template page for your new template appears in Saved mode with an Attachments related list.

**6. (Optional) Attach a document.**

**7. If you select either HTML option (HTML or Custom) in Step 4, enter the properties for the e-mail template and click the Save & Next button.**

If you choose to build your e-mail template with a letterhead, you have to select a previously created letterhead and then a layout by using the drop-down lists provided. After you click the Save & Next button, the Step 3 page of the wizard appears.

Step 2. Text Email Template: New Template

Step 2 of 2

Previous Save Cancel

Email Template Information

Folder Accounting Templates

Available For Use

Email Template Name

Template Unique Name

Encoding General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Description

Subject

Email Body

Previous Save Cancel

**Figure 8-1:**  
Create  
a text  
template.



You can create HTML or Custom e-mail templates only if you have the Edit HTML Templates permission. See an admin if you don't have the right permissions.

- 8. Create the HTML version by typing and formatting the content and copying and pasting merge fields.**
- 9. Click Preview to review your work and, when you're done, click the Save & Next button.**

The Step 4 page of the wizard appears.

- 10. Enter the text version of the e-mail template.**

For those customers who can't or don't want to receive HTML e-mails, they can receive the text version. If the message is similar or identical to the HTML version, click the Copy Text from HTML Version button and modify the content, as needed.

- 11. Click the Save button.**

An HTML or Custom Email Template page for your new template appears in Saved mode with an Attachments related list, which you can use for attaching standard documents.

We show you how to use your e-mail template in the later section, "Using e-mail templates."

## *Saving Third-Party E-Mails to Salesforce*

Salesforce allows you to send e-mails to Leads and Contacts; however, the management of the conversations (that is, the back and forth of e-mail dialog that occurs) happens in your company's e-mail management system of choice.

Many companies today are moving their e-mail systems online to reduce the costs of using and maintaining a traditional e-mail software system like Microsoft Outlook. Don't get us wrong, Outlook and Lotus Notes are the big gorillas of the e-mail (officially called "productivity tools") space. At the same time, acceptance of using e-mail systems like Google Gmail or Yahoo! Mail for business purposes is gaining momentum.



Chapter 3 explains how to download the Connect for Microsoft Outlook plug-in to synchronize e-mails in Outlook with Salesforce Leads and Contacts.

If you're using a third-party online e-mail system, you can still save and track your outbound e-mails to Salesforce, too, which allows you to connect an e-mail to a record.

## *Activating the Email to Salesforce feature*

To first activate the Email to Salesforce feature, have your administrator choose Setup→Administration Setup→Email Administration→Email to Salesforce. Click the Edit button in the middle of the Email to Salesforce page to select the check box to the left of the Active field to enable Email to Salesforce.



If you have sophisticated e-mail security policies and know whether your e-mail domains support the SPF, SenderID, or DomainKeys protocols, be sure the admin also selects the Advanced Email Security Settings check box. Salesforce uses these protocols to verify the legitimacy of the sender's e-mail server. If the e-mail server passes at least one of these protocols, Salesforce processes that e-mail and proceeds to log it as an activity under a Lead or Contact.

After you make your check box selections and click the Save button in the middle of the page, a pop-up box appears that optionally allows the admin to notify all Salesforce users about the Email to Salesforce feature.

## *Identifying your Email to Salesforce address*

After your administrator activates Email to Salesforce, choose Setup→Personal Setup→Email. Within the Email section, click the My Email to Salesforce link to get to the My Email to Salesforce page. In the middle of the page, a highlighted field notes your Email to Salesforce address. Whenever you're writing an e-mail in your online e-mail system (we use Gmail as the example), paste that address into the BCC field of your e-mail. When you send your e-mail, it's logged as a completed task in Salesforce, under whichever Lead or Contact record whose e-mail address matches that in the TO field.

If you send and receive e-mail from multiple addresses (and possibly from the same inbox), you can list all your e-mail addresses so Salesforce can associate correspondence from those e-mail addresses to the automatically generated Email to Salesforce address. To edit your e-mail addresses, follow these steps:

- 1. Click the Edit button in the middle of the My Email to Salesforce page.**
- 2. In the My Acceptable Email Addresses field, add all the e-mail addresses that apply, separated by commas.**
- 3. In the Email Associations section, select the Opportunities, Leads, or Contacts check box, depending on which object(s) you want Salesforce to attach your external e-mails to.**

4. (Optional) Select the **Email Me Confirmation of Association** check box to set your preference for whether you want to be sent a link via e-mail of your newly created e-mail record in Salesforce.

## *Saving an e-mail to Salesforce*

After you set your Email to Salesforce special e-mail address, it's time to use it.

Keeping your Web browser open to Salesforce and the My Email to Salesforce page, open a new browser window to access your online e-mail system and compose an e-mail (again, we use Google Gmail as example) to a person whose e-mail you know is in Salesforce, associated with a lead or contact. (Make sure that your relationship with this person allows you to send test e-mails to them, or you might have some explaining to do!) Simply copy the special e-mail address and paste it into the BCC field. When you're done writing the body of the e-mail, send it, and *voilà!* Almost instantaneously, it appears as an activity associated with that lead or contact.

## *Sending E-Mail from Salesforce*

You can send an e-mail to any lead or contact stored in Salesforce with a valid e-mail address. By sending from Salesforce, you can ensure that you and your team members can keep track of critical outbound communications to customers and prospects.

## *Creating and sending e-mail*

You can initiate your outbound e-mail from many different records in Salesforce, including opportunity, account, case, campaign, lead, and contact records. To create and send an e-mail, go to the relevant record and follow these steps:

1. **Click the Send an Email button on the Activity History related list.**

A Send an Email page appears, as shown in Figure 8-2. The Email format is in Text, with a Switch to *Format* link appearing to the right of it. Alternatively, click the Send an Email button in the HTML Email Status related list to default to HTML format. Either way, if you change your mind, you can always switch formats on the Send an Email edit page.

If you have organization-wide e-mail addresses set up in Salesforce, then you can select one as your From address. If not, then your standard e-mail address will default as the From address.



**Figure 8-2:**  
Composing  
an e-mail.

## 2. Decide in what format you want to send your e-mail:

- *Switch to Text Only:* You want to send the message using only text — no HTML. A dialog box appears to warn you that any HTML formatting will be removed. When you click OK, the box disappears, and the format is switched.
- *Switch to HTML:* Send your message in HTML format.

If you decide to send your e-mail with HTML, you get an added bonus of being able to track your e-mail. See the later section, “Tracking HTML e-mails.”

## 3. Type the recipient’s name in the To field and then click the Lookup icon on the right of the field to search for the contact or lead.

A pop-up window appears, containing a search tool and a list of search results.



If you send an e-mail from the relevant lead or contact record, you can eliminate this step because the To field is pre-filled. But, remember to use the Related To field to associate the e-mail to other records, such as an opportunity.

## 4. Select the correct person by clicking the name, or refine your search by modifying the name or using wildcards; then click Go.

When you select the recipient, the pop-up window disappears, and the To field is populated with your selection.

## 5. Use the Related To drop-down list to associate the e-mail with the correct type of record, and then click the Lookup icon to the right of the adjacent field to find the exact record — similar to the process in Steps 3 and 4.

Depending on which record you started from, the Related To drop-down list might already be filled.

**6. In the Additional To field, type additional primary recipient e-mails.**

These folks get their e-mail on the To list when they receive and open up your message. They don't have to be contacts or leads.

**7. Click the CC link or the BCC link to copy other contacts or users to the e-mail.**

A pop-up window appears, containing a drop-down list for co-workers at your company and for contacts of the account.

**8. Select names in the Contacts list box, use the double arrows to include them as recipients, and then click Save.**

The pop-up window disappears, and the CC and BCC fields reflect your selections.

**9. Click in the CC or BCC fields and add additional e-mail addresses, as needed.**

Salesforce allows you to send e-mails to people who aren't contacts, leads, or users. Just type the e-mail address directly into this field.

If you want to use an e-mail template, stop here and go to the next section.

**10. Complete the Subject and Body fields of the message and then click Send.**

If your contact or lead in the To field doesn't yet have an e-mail address, this absence is flagged before you send the e-mail. A Click Here to Edit the Email Address link appears that you can click to associate an e-mail with the record without having to leave your Send an Email page.

The record that you started from reappears, and a link to a copy of your e-mail appears in the Activity History related lists of the records that you linked.

## *Using e-mail templates*

In the section "Building personal e-mail templates," earlier in this chapter, we show you how to create a personalized template. In this section, you find out how to send an e-mail that uses a template you created. First, create an e-mail (as described in the preceding section), and then follow these additional steps before you send it:

**1. Before you modify the Subject and Body fields, click the Select Template button at the top of the page.**

A pop-up window appears, displaying a list of available templates.

2. Click the Folder drop-down list and select the folder where you saved your template.

The pop-up window refreshes, displaying a list of available templates based on your folder selection as shown in Figure 8-3.

**Figure 8-3:**  
Available  
e-mail  
templates.

Folder: Sales Templates		
Name	Type	Description
<a href="#">Post Sales Call Email</a>	HTML	Send after Sales Call
<a href="#">SOW Attached</a>	HTML	

3. Select the desired template by clicking the relevant link in the Name column.

The pop-up window disappears, and the page reappears with content based on the template that you selected.

4. Modify the message to further personalize the e-mail and then click Send.

The record you started from reappears, and a link to a copy of your e-mail appears under the Activity History related lists of the linked records.

## *Sending Mass E-Mail*

If you struggle to stay in touch with prospects or customers on a regular basis, you can use Salesforce to send mass e-mails and shorten your workload. Mass e-mail is particularly helpful for sales reps who send common messages that don't require high levels of personalization. For example, if you're an institutional sales rep selling shares of a hedge fund, you might want to send a monthly e-mail newsletter to sophisticated investors specifically interested in your fund.



When sending mass e-mail, Professional Edition users can send a maximum of 250 e-mails at a time. Enterprise Edition users can send as many as 500 e-mails, and Unlimited Edition users can send as many as 1,000 e-mails. A company is limited to 1,000 e-mails per day.

You can send a mass e-mail to contacts or leads — the method is similar.

To send out a mass e-mail, go to the Contacts home page or Leads home page, and follow these simple steps:



1. **Click the Mass Email Contacts link or the Mass Email Leads link (depending on which home page you're on) under the Tools section.**

The Recipient Selection page appears.

2. **Specify the recipients that you want to include in the e-mail from the View drop-down list.**

If you find the recipients you want, skip to Step 5.

3. **If you can't find the view that you want from the View drop-down list, click the Create New View link.**

The Create New View page appears. In most circumstances, you need to create a custom view.

4. **To create the new view, fill in the information that you want to use to filter the recipients for your mass e-mail and then click Save.**

For example, if you want to send an e-mail to all customer contacts located in New York, you can build a view. (See Chapter 5 for details on creating custom views for contacts.) When you click Save, the Recipient Selection page reappears, displaying a list of contacts that meet your criteria.

Any of your leads or contacts that have the Email Opt Out check box selected are automatically omitted from these lists.

5. **Review the list and select the check boxes to designate the contacts to whom you want to send the mass e-mail.**

Contacts or leads that don't have e-mail addresses lack an available check box in the Action column.

6. **When you're satisfied with your selections, click Next.**

A Template Selection page appears, where you can select an e-mail template from the e-mail template folders and associated lists.

7. **Use the Folder drop-down list to locate the right folder and template.**

You can skip this step if you already see the desired e-mail template on the list results.

8. **Select the desired e-mail template by selecting the appropriate radio button in the Name column, and then click Next.**

A Preview Template appears.

9. **Review the content for the mass e-mail and then click Next.**

A Confirmation page appears, summarizing the number of contacts that will receive the mass e-mail.

10. **Select the appropriate check boxes if you want to receive a blind copy, store an activity, and/or use your signature.**



11. Give this mass e-mail a name in the Mass Email Name field.
12. Use the radio buttons to select whether you want to send the e-mail now or schedule it for delivery (set the time and date in the Schedule for Delivery On and Time Zone fields).
13. When you're done, click Send.

A Complete page appears, confirming the delivery of your mass e-mail.

## Tracking E-Mail

By sending and storing important business-related e-mails in Salesforce, you and your teams can get a more complete picture of what's happening with your accounts, contacts, and so on. In the following sections, we show you the basic ways to view your e-mail records and a special feature in Salesforce that allows you to track HTML e-mails.

### Viewing e-mails in Activity History

When you send an e-mail from Salesforce, a copy of your message is logged as a task record on the Activity History related list of related records. For example, if you send an e-mail from an opportunity record in Salesforce, you can view that e-mail from the related Opportunity, Contact, and Account detail pages. See Figure 8-4 for an example.

**Figure 8-4:**  
Viewing  
e-mail  
records on  
an Activity  
History  
related list.

Action	Subject	Related To	Task	Bus Date	Assigned To	Last Modified Date/Time
Com   Del	Email Update on Salesforce for Customers		✓	8/30/08	Matt Kaufman	8/30/08 9:38 PM
Com   Del	Mass Email: Happy Holidays		✓	8/29/08	Matt Kaufman	8/30/08 9:31 PM

On an Activity History related list, you can also click the View All button if you want to see the completed activities (including e-mail) on a single page.

## Integrating with Outlook e-mail

If your company uses Microsoft Outlook for e-mail, you can work from within that application and still track your e-mails in Salesforce. You may be accustomed to receiving and sending your e-mails from Outlook, so this

Salesforce feature can help you capture both inbound and outbound e-mail on relevant records in Salesforce. For more information on installing and using the free Connect for Microsoft Outlook plug-in, see Chapter 3.

## Tracking HTML e-mails

If you often wonder whether customers pay attention to e-mails that you send them, you can use the HTML Email Status related list for confirmation that the e-mail was opened. Sales reps can use this feature to see whether contacts and leads are opening and viewing important e-mails on quotes, proposals, and so on.



When you send an HTML e-mail from Salesforce, the e-mail is embedded with an invisible pixel that can be used for tracking.

You can view that e-mail not only from the Activity History related list, but also from the HTML Email Status related list of a lead or contact record.

The HTML Email Status related list (see Figure 8-5) shows data on a number of key elements, including the dates the e-mail was sent, first opened, and last opened, as well as the total number of times it was opened. Although this information isn't a sure-fire way to determine whether your customer wants to buy, some reps use this feature to measure interest on a single e-mail or even mass e-mails.

**Figure 8-5:**  
Viewing  
e-mail  
records on  
an HTML  
Email Status  
related list.

HTML Email Status					
		<a href="#">Send An Email</a>	<a href="#">View All</a>		
Action	Subject	Date Sent	Date Opened	# Times Opened	Last Opened
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email Update on Salesforce for Dummies</a>	6/20/2010 9:00 PM	6/20/2010 9:02 PM	2	6/20/2010 9:40 PM



# Part III

# Driving Sales with Sales Cloud

The 5<sup>th</sup> Wave By Rich Tennant



"I wouldn't qualify this one too long."

## *In this part . . .*

**S**ales is pretty straightforward, right? Your company makes widgets, you sell them to new prospects or existing customers, and you get a nice commission check for your efforts. The cycle starts all over, and hopefully, you get to knock on the door of existing customers because you've built up a rapport with them. Or so you'd hope. For many companies, life may not be that cut and dried.

First, in this day and age, never take your existing customers for granted. With easier access to information, your customer has more negotiating power and is more likely to hop to a competitor (or to you) if the value's there. That means you should always be courting new leads and moving them along the various stages of your sales process. Your pipeline should have no dry spells.

Second, you better know what the next steps are to move them closer to winning that deal. Spreadsheets show outdated information and aren't enough help when you need to be more nimble than your competitors. And what if your company sells a whole laundry list of products and services to a wide range of customers in varying industries . . . and even the prices of your offerings differ depending on the customer? How do you organize that in a spreadsheet? Or what if your company has an indirect sales force to help bring in deals from across the globe? How will you track all those moving parts to get an accurate view of what's really in your pipeline? Don't worry. Salesforce helps organizations manage their deals.

In this part, we cover how to track sales scenarios in Salesforce. We show you how to use Salesforce to track the various products that you deal with to close more deals. Whatever the size of your sales organization, read ahead if you'd like to take your use of Salesforce to the next level.

## Chapter 9

# Prospecting Leads

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### *In This Chapter*

- ▶ Defining important lead terms
  - ▶ Creating, importing, and sharing leads
  - ▶ Arranging your leads
  - ▶ Converting leads
  - ▶ Keeping your leads database up to date
  - ▶ Building your leads database with Jigsaw
- 

**O**ften, we hear frustrated sales people say, “We could hit our numbers if we just had enough leads to fill our pipeline.” Leads are the building blocks by which many companies drive their sales.

Loosely defined, a *lead* is a person or a company that might be interested in your services. Some organizations refer to them as *suspects* because that person might not even be aware of you. Others call them *prospects* because a lead has to be someone who has expressed interest in your service. Whatever your favorite terminology is, you can use leads to efficiently follow up on sales inquiries, aggressively attack new markets, and vastly improve your sales pipeline.

In this chapter, you can discover all the basic tricks you need to convert leads into revenue. You need to get your existing leads into Salesforce, organize them in a logical fashion, and update them when you follow up with them. Also, we discuss how to convert a lead into an actual opportunity that you can link to an account and a contact. If you’re a lead manager or administrator, we devote an entire section to how you can manage and maintain your lead database. Finally, we review how to expand your leads with Jigsaw for Salesforce.

## Introducing the Lead Record

A *lead record* consists of a number of fields that you use to capture information about a potential lead. A lead record has only two modes: an Edit mode, in which you can modify the fields, and a Saved mode, in which you can view the fields and related lists.

The standard record comes predefined with several fields. Most of the terms are immediately clear, but if you want specific definitions, click the Help link in the top-right corner of Salesforce. In the following list, we describe the most important standard fields:

- ✔ **Lead Owner:** The person who owns the lead. If no one owns the lead, Salesforce can automatically place the lead in a queue. You can then assign a group of users, who can take leads in the order they're in the queue.
- ✔ **Lead Status:** One of three required fields on a lead record. Lead Status is a drop-down list of values, and this field is critical if you want to follow a standard lead process. We talk more about lead status in the nearby sidebar, "Building an effective lead process."
- ✔ **Lead Source:** A standard, but not required, field on a lead record. If you use it, you can define and track the sources of your leads by using this field.



Lead sources are the originators of leads that come knocking at your door. These can be related to broad communication channels (a toll-free number, cold call, or Web form, for example), more specific types of marketing venues (tradeshows, print ad, partner referral, and so on), or a blend of both. It's up to you. Always remember to balance your desire to get really granular data with the tolerance of the users who often have but a few seconds to customize this field (alongside other fields). And if you really want to track granular details of where leads are coming from, seriously consider using Campaigns, described further in Chapter 13.



When you first get a lead, you'll likely want to qualify that lead to make sure there really is a sales opportunity for you. For example, perhaps you want to be certain that they have the budget and a real interest and aren't just kicking tires. A qualified lead is a lead that meets your qualification requirements.

You'll have your own definition of what qualifies a lead, so jot it down, and then seek out someone to customize your lead record. (See Chapter 21 for the how-to details on building fields, rearranging your layouts, and other design tricks.) You have greater success with leads if you collect the right information.



## Building an effective lead process

The key to a successful lead program that contributes to sales is a well-constructed lead process built into your Lead Status drop-down list. Salesforce provides a default list of four statuses: Open, Contacted, Qualified, and Unqualified. These statuses may appear straightforward, but they require definition because those four choices might not mirror your process or your terminology. The good news is that after you define the statuses, your administrator can quickly modify the values. The process starts with the Lead Status field, but it doesn't end there. Here are some additional suggestions for how you might construct your lean, mean, lead-generating machine:

- ✓ Build fields to capture qualification criteria.
- ✓ Make it clear at what point in the process a lead should be converted to an opportunity.
- ✓ Decide who'll manage the lead program and what that entails. Make sure that he or she has sufficient permissions to administer the lead database.
- ✓ Figure out at what point in the process a lead should be deleted or archived.
- ✓ Set up queues, if it makes sense, to manage the workload and drive the competitive spirit.
- ✓ When you figure out your process, train your users so that everyone knows what's expected of them.

## Setting Up Your Leads

Before you can begin working your leads, you need to add the lead records into Salesforce. In the following sections, we show you three quick approaches for lead creation, and if needed, how to share your leads with the right people. Then, if you want to capture leads from your Web site, see Chapter 13 for details on generating Web-to-Lead forms.

### *Adding new leads*

The best way to create a lead is to use the Create New drop-down list on the sidebar. To create a lead using this method, follow these simple steps:

**1. Select the Create Lead item from the Create New drop-down list.**

A New Lead page appears in Edit mode, as shown in Figure 9-1. The only pre-filled field is the Lead Status field.

**2. Fill in the fields as much as you can.**

At a minimum, you must complete the Last Name and Company fields.

**Figure 9-1:**  
Filling out a  
lead record.



TIP

You can add a list of target companies as leads, even if you don't yet know the names of the right people. In certain cases, you might have only the name of a company because you know you want to target it, but you don't yet know who to call. You can work with incomplete information; in these cases, we recommend that you type ? or **unknown** in the Last Name field so that you know this information is missing.

### 3. When you're done, click the **Save** button or the **Save & New** button.

- *Save*: The lead record appears in Saved mode, and your changes are displayed in the fields.
- *Save & New*: Salesforce knows that sales people commonly add multiple leads before working them. If you click Save & New, the lead is saved, and a New Lead page appears in Edit mode.



REMEMBER

When entering or editing records, click the Save button or the Save & New button when you're done. Otherwise, you don't save the information that you just typed for that record. If you make this mistake and haven't yet logged out of Salesforce, try clicking the Back button on your browser (as opposed to hitting your head in frustration), which hopefully gets you back to the record in Edit mode. Then, click Save and breathe a sigh of relief.

## *Cloning an existing lead*

If you're working a particular company and want to enter multiple leads for that company, you can save time by cloning leads. For example, say you already created a lead record for Sergey Brin at Google. When you talk to his assistant, she courteously refers you to Larry Page. In this case, cloning can save you many extra steps.

To clone a lead record from an existing lead, follow these steps:

- 1. Click the Clone button at the top of the lead record.**

A new lead record appears in Edit mode. All the information is identical to the previous lead record.

- 2. Edit the information on the new lead, where appropriate.**

Pay attention to what's pre-filled because you want to avoid inaccurate information on the new lead record.

- 3. Click Save when you're done.**

The newly created lead reappears in Saved mode. To verify this, click the link to the older lead, which you can find in the Recent Items section on the sidebar.



## *Importing your leads*

If you already have a file of leads, you probably want a faster way to get them into Salesforce than entering them manually. You must be an administrator to import leads, so if you're not, find your administrator, tell her what you're trying to do, and have her read this section.



Although you can import up to 50,000 leads at the same time, test an import with five or so leads first, just to make sure that you know what you're doing. After the test data is imported, review your new lead records to make sure they contain all the information that you want brought in. Delete the test records, refine your import file, and then run through the final import.

To import lead files, follow these steps:

- 1. On the Leads home page, click the Import Leads link at the bottom of the page, below the Tools heading.**

The Lead Import Wizard page appears, providing you with a four-step process to import your records, plus helpful hints.

- 2. In your existing lead file or system, compare your fields against the lead fields in Salesforce. Map all your fields between your current system and Salesforce.**

If you can map all the necessary fields, move to the next step. If not, add fields to the lead record by customizing Salesforce. (See Chapter 21 for simple instructions on adding fields.)



While someone is mapping the fields from your current system to Salesforce, you should also be talking with your company about cleaning up that data. Now's a good time to discuss which of your current system's fields are still needed in the new world. Some fields may have been used several years ago, but no one's been filling them in since you can remember, and no one's bothered to remove or hide them from the current system. Also, there could be lots of duplicate or partial records. Discuss with your company and your Salesforce consultant about best approaches to cleaning up this information.



*Mapping* is a technical term for matching one field to another field, typically in different databases, in order to properly move data. For example, in Microsoft Outlook, you type a corporation's name into the Company field. In Salesforce, you typically use the Account Name field. These two different labels have the same meaning. Mapping is the process by which you decide that data from the Company field in Outlook should correspond to the Account Name field in Salesforce.

- 3. Export your file.**

You might have leads in an existing database, such as ACT!, Constant Contact, or Microsoft Access. Most systems like these have simple tools for exporting data into various formats. Select the records and the fields that you want. Then, export the file and save it in a `.csv` format. If your leads are already in spreadsheet format (such as Excel), just resave the file in `.csv` format.

- 4. Review your lead data.**

You've probably heard the old adage "garbage in, garbage out." Regardless of whether your company spent some time with initial housecleaning before this step, it's important to review this data again at this point. Clean up your information before you bring it into Salesforce so that you can save yourself the effort later.

- 5. When you're done with the preparation, click the Start the Import Wizard link on the Lead Import Wizard.**

A pop-up window labeled Step 1 of 3 Upload the File appears, as shown in Figure 9-2.

- 6. Complete the fields in Step 1 of the wizard.**



**Figure 9-2:**  
Uploading  
the lead file.

Assuming that you already prepared your file, you probably just need to follow these steps:

- a. Load the file by clicking the *Choose File* button and selecting the correct file on your computer.
- b. Select a default lead source, if relevant.
- c. Apply an assignment rule if you want leads to route directly to assigned reps.

If you don't use an assignment rule, all the leads that you import are assigned to you unless you otherwise specify a Lead Owner in the file. (See the section "Creating assignment rules for automatic routing," later in this chapter.)

- d. Select the check box if you want to use assignment rule settings to send e-mail notifications to the record owners.
- e. Verify the character coding.

Salesforce pre-fills this picklist based on your Company Profile, and you rarely have to change it.

- f. Select the matching type.

If you want Salesforce to avoid importing duplicate records, choose whether you want to identify a duplicate lead by matching Salesforce ID, name, or e-mail. If a lead record with the matching criteria already exists in Salesforce, that record is updated with the information in your file.

- g. Select the check box if you want to trigger workflow rules to new and updated records.

See Chapter 21 for tips on improving workflow.

### 7. When you're done with Step 1 of the wizard, click Next.

The Field Mapping page appears.

### 8. Map the fields between your file and Salesforce and then click Next.

The Field Mapping page displays all the Salesforce lead fields as labels with drop-down lists that correspond to the fields in your file. Simply go through the list of fields and select the field from the corresponding file that you're importing which maps to the Salesforce field, as shown in Figure 9-3.

After you click Next, the review and confirm page appears, displaying a list of warnings, if any, on your impending import.

### 9. Review the messages for possible errors.

This step basically warns you about problems with the data or lets you know about fields that you haven't mapped. If you discover an error, you can click the Back button and refine your mapping, or even close the wizard so that you can improve your import file. You might have to start over, but at least you avoid importing bad or incomplete data.

Step 2 of 3: Map the fields
Lead Import Wizard

In the list below, select the field in your import file that should be imported into each salesforce.com field. Once you have finished, click **Next**.

[< Back](#)
[Next >](#)

Record Owner: *Determined by Lead Assignment Rule*  
 Lead Source: *Determined by Lead Source set in previous step*

**Lead Information**  
 You should import into either the Lead Full Name or First Name and Last Name, but not both.

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Full Name:	-- none selected --	Company:	-- none selected --
First Name:	First Name (col 1)	Rating:	-- none selected --
Last Name:	Last Name (col 2)	Website:	-- none selected --
Salutation:	-- none selected --	Annual Revenue:	-- none selected --
Title:	-- none selected --	Industry:	-- none selected --
Email:	Email (col 0)	No. of Employees:	-- none selected --
Status:	-- none selected --	Email Opt Out:	-- none selected --
Description:	-- none selected --	Do Not Call:	-- none selected --
Fax Opt Out:	-- none selected --		

**Address Information**

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Address Line 1:	Street (col 14)	Phone:	Phone (col 11)
Line 2:	-- none selected --	Fax:	Fax (col 9)
Line 3:	-- none selected --	Mobile Phone:	Mobile (col 10)
City:	City (col 3)		
State/Province:	State/Province (col 13)		
Postal Code:	Zip/Postal Code (col 17)		
Country:	Country (col 4)		

**Lead Custom Fields**

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
SIC Code:	-- none selected --	Product Interest:	-- none selected --
Primary:	-- none selected --	Current Generator(s):	-- none selected --
Number of Locations:	-- none selected --		

**Figure 9-3:**  
Mapping the  
lead fields.

**10. When you're completely satisfied with your mapping, click the Import Now button.**

An Importing page appears to let you know that the import is in progress, including an estimate of how long it will take.

**11. Click the Finish button.**

The pop-up window closes.

**12. Check the lead records that you imported.**

Salesforce sends you an e-mail after your file has been successfully imported. To check your handiwork, click the Leads tab to go to your Leads home page. In the View drop-down list, select Today's Leads to see a list of the leads that were created today. Click the link for a lead that you just imported and review the information for accuracy.

Importing leads is one of the fastest ways for you to set up your leads in Salesforce so that you can begin working them.

## *Sharing your leads*

Depending on how your company has set up its Salesforce sharing model, you may see a Sharing button on the top section of your Lead record.

The Sharing button allows you to share varying levels of access to your lead record to any user or group that you designate. For example, a new inside sales rep may want to share a lead with a more senior teammate so that they can tackle a new prospect together.

To share a specific lead record, follow these steps:

**1. Click the Sharing button on the top of the lead record.**

The Sharing detail page for the lead appears. By default, you're the only user with full access to your lead. This page also includes an explanation of access levels.

**2. Click the Add button.**

The New Sharing page appears.

**3. Select members from the list of users, roles, roles and subordinates, or groups.**

**4. Choose the level of lead access that you want to provide.**

**5. When you're done, click Save.**

The Sharing detail page reappears for the lead.

## Breaking into uncharted waters

A leading Internet performance-monitoring company wanted to sell its services to a variety of new, untested markets. This salesforce.com customer had a stronghold in financial services but wanted to extend its client base to other Fortune 500 companies. Because of the specific nature of its business, the actual names of the decision makers that it wanted to target was publicly unavailable.

Marketing simply imported the Fortune 500 list and set the Last Name field as Unknown. Then, the company used Salesforce and a pool of cost-efficient telemarketers to generate leads and set up appointments between actual buyers and the company's outside field reps. In just six months, this use of Salesforce helped dramatically improve qualified lead generation and increased the pipeline and new bookings while breaking ground in new markets.

## Organizing Your Leads

When you have some leads in Salesforce, you want to organize them to make them productive. When we work with companies, we often hear this request from sales people: "I just want to see my data, and it needs to be the way that I want to look at it." Just like Goldilocks, you want your leads to look just right.

In the following sections, we show you how you can use views on the Leads home page to provide greater focus for you and your sales teams. Then, for even more robust organization of your lead information, see Chapter 18 for specifics on how to build custom lead reports.

### Using lead views

When you select a view, you're basically specifying criteria to limit the results that you get back. For example, if you're one of many sales reps, you might not want to waste your time sifting through all your company's leads; you want to see just the ones that you own. With Salesforce, you can do that in one click. On the Leads home page, Salesforce comes with four predefined views:

- ✔ **All Open Leads:** Provides a list of all the lead records in which the Lead Status is still Open
- ✔ **My Unread Leads:** Gives you a list of your leads that you haven't yet viewed
- ✔ **Today's Leads:** Shows you only leads that were created today
- ✔ **Recently Viewed Leads:** Allows you to look at a list of recently viewed leads



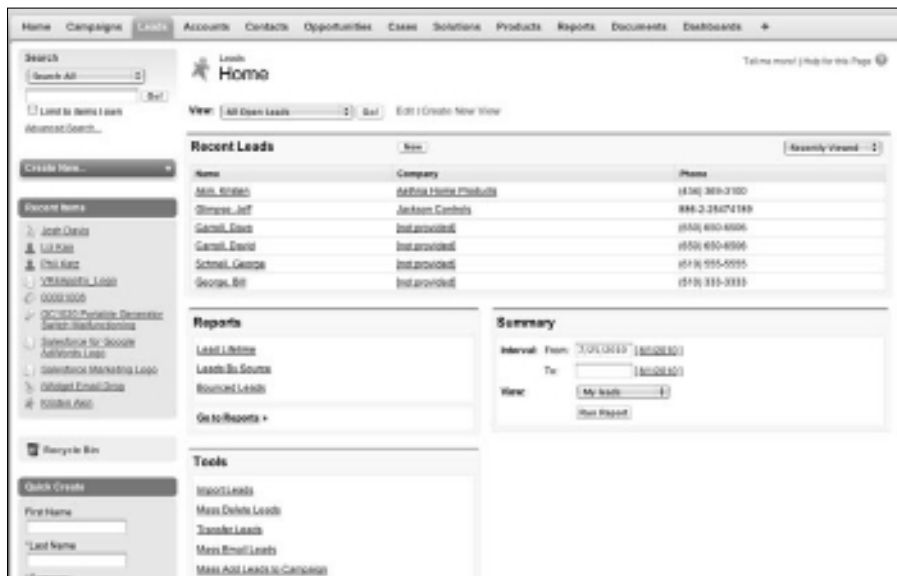
To try out a preset view, go to the Leads home page (as shown in Figure 9-4) and do the following:

1. **Click the down arrow on the View drop-down list.**

The four options in the preceding bulleted list appear, maybe along with some other choices that have been created for you.

2. **Select one of the views.**

For example, if you select the My Unread Leads view, a list page appears, displaying any of your unread leads. From this list page, you can perform a variety of standard operations, including editing, deleting, and viewing a record. See Chapter 2 for details on using list pages.



**Figure 9-4:** Previewing lead views on the Leads home page.

## Creating custom lead views

For many users, the preset views are a good start. If you want special lists for the way that you follow up on your leads, though, build custom views. For example, if you call only on companies in the manufacturing industry located in the state of Florida with revenue over one billion dollars, take a minute and build a custom view. This custom view is always accessible to you, thus saving you time.

To create a view from scratch, follow these simple steps.

1. On the Leads home page, to the right of the View drop-down list, click the Create New View link.

A New View page appears, which includes a wizard to help create your view, as shown in Figure 9-5.

The screenshot shows the 'New View' wizard in Salesforce. It is divided into three steps:

- Step 1. Enter View Name:** The 'View Name' field contains 'Big Florida Manufacturers' and the 'View Unique Name' field contains 'Big\_Florida\_Manufacturers'.
- Step 2. Specify Filter Criteria:**
  - Filter By Owner:** Radio buttons for 'All Unconverted Leads', 'My Unconverted Leads' (selected), and 'Queue' with a dropdown menu.
  - Filter By Campaign (Optional):** A 'Campaign Name' search field.
  - Filter By Additional Fields (Optional):** A table with columns 'Field', 'Operator', and 'Value'. The first row has 'Industry', 'equals', and 'manufacturing'. There are four empty rows below it.
- Step 3. Select Fields to Display:** Two columns: 'Available Fields' and 'Selected Fields'.
  - Available Fields:** Salutation, Last Name, First Name, Title, Website, Phone, Mobile, Fax, Street, City, Zip/Postal Code.
  - Selected Fields:** Name, Company, State/Province, Email, Lead Status, Created Date, Owner Alias, Unread By Owner.
  - Buttons: 'Add', 'Remove', 'Up', 'Down', 'Top', 'Bottom'.

**Figure 9-5:**  
Building a  
custom lead  
view.

2. Enter a name for the view.

For example, you might call the view Big Florida Manufacturers.

3. Decide whether you want this view to search the entire leads database, your leads, or a queue.

If your company's marketing department creates marketing campaigns in Salesforce to help generate leads, you can further limit your view to leads associated with a specific campaign.

This feature is part of Salesforce's integrated campaign builder feature. (Marketing managers: See Chapter 13 for details on how to set up this feature.)



**4. Under the Specify Filter Criteria step, select the criteria for your search.**

A basic criteria query is made up of three elements:

- *Field:* The first box is a drop-down list that contains all the fields on the lead record. For example, you could choose the Industry field.
- *Operator:* The second box is a drop-down list that contains operators for your search. That sounds complicated, but it's easier than you think. Taking the example from the preceding bullet, you'd select Equals from the drop-down list.
- *Value:* In the third box, you type the value that you want in the search. For this example, you'd type **manufacturing**.

**5. Select the columns that you want displayed on your list page.**

Although Salesforce's preset views display common fields, such as Email and State, you can select as many as 15 lead fields to display on your list page.

**6. Under the Restrict Visibility step, decide whether you want others to see your custom view and select the appropriate radio button.**

Your decision is made simple if the Visibility step doesn't appear. Otherwise, think about whether other users can benefit from this view when you complete this step.

**7. When you're done, click Save.**

You're taken to a new list page, which is completely customized based on the search criteria that you chose in Step 4.

## *Accepting leads from a queue*

If you're a rep assigned to a queue, you can access the queue in the View drop-down list on the Leads home page. The queue list page looks just like a regular list page, but you can use it to grab and claim leads. (See the section "Making use of lead queues," later in this chapter, for details on setting up queues.)

To pull leads from a queue and make them your own, go to the Leads home page and follow these steps:

**1. Select the queue name from the View drop-down list.**

The queue list page appears.

2. **Select check boxes in the Action column to the left of leads that you want to claim.**

Your manager might have specific guidelines. This is your chance to click into some records and try to pick the hottest leads.

3. **Click the Accept button.**

The queue list page reappears, minus the lead or leads that you selected.



Another way to keep your leads organized is to make sure that multiple versions of the same person don't show up in Salesforce. This can wreak havoc as people update activity information on different records for the same person. Salesforce detects whether duplicate records already exist and merges them for you. Read the next section to see how to de-duplicate lead records.

## *Following Up on Leads*

After you receive a new lead, you want a quick way to follow up and determine what you caught: a big one, a warm one, or just another person looking for a freebie. Your company might already have a standard lead qualification process, but the following sections talk about some of the ways that you can use Salesforce to pursue leads.

### *Finding and merging duplicate lead records*

Before following up on a new lead, click the Find Duplicates button on the specific lead record to see whether a record already exists. You probably know that duplicates frequently occur with leads. For example, if you capture leads from your Web site, the same visitor might fill in your Web form multiple times, even with the best of intentions. Instead of wasting your time or upsetting the existing lead, check first for duplicates.

By checking for duplicates, you might up your chances of a qualified lead. When you merge duplicate records, the remaining record inherits not only the information you select, but also linked records on related lists.



To merge lead records, you must be the Lead Owner of the records, the Lead Owner's manager (that is, the Lead Owner must be subordinate to you in the Role Hierarchy), or a system administrator.

To find and merge duplicate leads, follow these steps:

1. Go to a lead record that you suspect or know has duplicates.
2. Click the Find Duplicates button at the top of the lead record.

A Search for Duplicates page appears, in five sections. The first section determines how you want to search Salesforce for duplicates. By default, Salesforce looks for a duplicate with a matching name, company, e-mail address, or phone number. The remaining four sections show any matching lead, contact, account, or opportunity records, based on the default matching criteria.

3. Select or clear search criteria boxes to narrow or expand your search. Click the Search button to return updated results.

Records matching any of the selected search criteria appear in their appropriate sections.

4. Review the duplicate lead records and select a maximum of three records to merge.

In Salesforce, you can merge only three records at a time.

5. Click the Merge Leads button on the Matching Leads related list.

A Merge Leads page appears, displaying, side by side, the selected records and any fields that have been completed, as shown in Figure 9-6.

**Merge Leads** Help for this Page

Previous Merge Cancel

Select the values that you want to retain in the merged record. Highlighted rows indicate fields that contain conflicting data. The Master Record selected will retain read-only and hidden field values. The record created by this tool will be retained if the merged record. Side-by-side records including any campaign-related activities will be associated with the new merged record.

	Dore Carroll (Sales AE)	Dorel Carroll (Sales AE)
Master Record	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lead Owner	Lit Kat	Lit Kat
Company	[not provided]	[not provided]
Title		
Lead Source	Purchased List	Purchased List
Campaign		
Industry		
Annual Revenue		
Phone	(800) 880-8888	(800) 880-8888
Mobile	(910) 888-8888	
Fax	(910) 888-8888	
Email	scarr@litkat.com	dcarroll@litkat.com
Website		
Lead Status	Open - Not Contacted	Open - Not Contacted
Rating		
No. of Employees		
Address	138 Brass Court Redwood City, CA 94063 USA	138 Brass Court Redwood City, CA 94063 USA
Product Interest		
SIC Code		
Number of Locations		
Current Generator(s)		
Primary Description		

**Figure 9-6:**  
Merging duplicate lead records.



**6. Compare the information and select the radio buttons to choose the values that you want to retain.**

At the top of each column, you can also choose to keep all the values from one record by clicking the Select All link.

**7. When you finish reviewing, click the Merge button.**

A pop-up window appears, prompting you to validate that you want to perform the merge. After you click OK, the merged lead reappears. Any records from related lists are kept.

## *Tracking leads with related lists*

How can you remember all the interactions that took place with a lead? Some of us have a hard enough time remembering what we did yesterday, let alone three months ago with 200 leads. Related lists on a lead record can help you capture all that information so that it's at your fingertips the next time you talk to a lead.

If you're looking for typical ways that sales people use lead related lists on a lead record, read the following list and look at Figure 9-7 for an example:

- ✔ **Log a Call:** The next time you respond to a lead and want to record what you said to the lead's assistant, click the Log a Call button and enter the details.
- ✔ **New Task:** You plan to call the lead back next Friday when you know the assistant is on vacation. Click New Task and set a tickler for yourself for Friday. (See Chapter 7 for details on how to fill out a new task record.)
- ✔ **Send an Email:** You get through to the lead, and he asks you to send him an introductory e-mail about your company. Click the Send an Email button to send and track the e-mail directly from Salesforce. We talk more about sending e-mail through Salesforce in Chapter 8.
- ✔ **New Event:** The lead agrees to a demo. Click New Event and schedule a meeting so that you don't forget.
- ✔ **Mail Merge:** Before you demo your new product, you need the lead to sign your standard non-disclosure agreement (NDA). Click the Mail Merge button and quickly create the NDA that has the lead's information pre-filled.
- ✔ **Add to Campaign:** You decide to invite the lead to the annual customer golf outing, a campaign tracked in Salesforce. Click the Add to Campaign button to add the lead to the campaign so that your marketing team remembers to send the lead an invitation.

Lead  
Mr Jeff Glimpse

Back to List: Campaigns

Open Activities (1) | Activity History (2) | Campaign History (1) | HTML Email Status (0)

**Lead Detail** [Edit](#) [Delete](#) [Convert](#) [Clone](#) [Find Duplicates](#)

Lead Owner	Liz Kao <a href="#">(Change)</a>	Phone	886-2-25474189
Name	Mr Jeff Glimpse	Mobile	
Company	Jackson Controls	Fax	
Title	SVP, Procurement	Email	jeff@jackson.com
Lead Source	Phone Inquiry	Website	
Industry		Lead Status	Open - Not Contacted
Annual Revenue		Rating	
		No. of Employees	
Address			
	Taiwan		
Product Interest	GC5000 series	Current Generator(s)	All
SIC Code	2768	Primary	Yes
Number of Locations	130		
Created By	Liz Kao, 4/16/2010 1:54 PM	Last Modified By	Liz Kao, 4/16/2010 1:54 PM
Description			

[Edit](#) [Delete](#) [Convert](#) [Clone](#) [Find Duplicates](#)

**Open Activities** [New Task](#) [New Event](#) [Open Activities Help](#)

Action	Subject	Task	Due Date	Status	Priority	Assigned To
Edit   Dis	Schedule presentation	✓	8/15/2010	Not Started	Normal	Liz Kao

**Activity History** [Log A Call](#) [Mail Merge](#) [Send An Email](#) [View All](#) [Activity History Help](#)

Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit   Del	Email	✓	5/11/2010	Liz Kao	6/11/2010 12:52 PM
Edit   Del	Call	✓	4/11/2010	Liz Kao	6/11/2010 12:52 PM

**Campaign History** [Add to Campaign](#) [Campaign History Help](#)

Action	Campaign Name	Start Date	Type	Status	Responded	Member Status Updated
Edit   Del   View	User Conference - Jun 17-19, 2011	3/8/2010	Conference	Received	<input type="checkbox"/>	6/11/2010 12:52 PM

**Figure 9-7:**  
Track  
activity with  
lead-related  
lists.

## Updating lead fields

In the course of your lead qualification, you inevitably collect pertinent information that you want to save directly on the lead record. Every time you capture important data on your lead, update your lead record by doing the following:

- 1. Double-click a field on the lead record to modify that field.**

If you see a padlock icon in that field, you can't modify it. Check with your system administrator whether he specifically locked down this field, or if it's one of those important system fields that Salesforce doesn't allow anyone to change.

- 2. Complete the fields, as necessary, to determine whether the lead is qualified.**

- 3. Update the Lead Status field when you make progress.**

Even if you discover that the lead is a waste of your time, that's progress.

- 4. Click Save when you're done making changes.**





At some point, you might decide that a lead can't become a qualified opportunity at this time. In that case, you can archive the lead by changing its status. Archiving inactive leads allows you to get a sense of how many leads are still being worked.

## Converting qualified leads

When you decide that a lead is actually a qualified opportunity, you can start using Salesforce's full opportunity tracking system. To do so, you must convert the lead to an opportunity. This conversion gives you two benefits:

- ✓ **Converting a lead to an opportunity allows you to track multiple contacts within an account, which you can do more easily than tracking a single individual lead.** In other words, if you have ten leads from Microsoft, none of them are linked with each other in Salesforce. But, by converting a lead, you create an account called Microsoft and you link all the Microsoft co-workers as contacts for the same account.
- ✓ **Your goal is to ABC (always be closing), so the sooner you can start managing opportunities and not just leads, the healthier your pipeline and wallet.** For a qualified lead, your sales process begins where your lead process ends.



When deciding whether to add names of companies or business people as leads or as accounts with contacts, remember that the leads module of Salesforce is nonrelational from lead to lead. If you're serious about going after a particular company, and the inter-relationships of business contacts will be important, we recommend that you add the target as an account, rather than as a lead.

To convert a lead to an opportunity, follow these steps:

- 1. Click the Convert button on a lead record that you want to convert.**

The Convert button is located at the top and bottom of the lead record. A Convert Lead page appears; see Figure 9-8.

- 2. Complete the required fields.**

Required fields are highlighted in red. Here's a summary:

- **Record Owner:** If the Lead Owner remains the Record Owner, don't change the selection. If the owner changes, click the Lookup icon and choose from the list of users. Select the Send Email to the Owner check box, if needed.



- **Account Name:** If Salesforce doesn't find an account that closely matches the Company field from your lead, it creates a new account record. In the event that it does find a match, select an option from the drop-down list, depending on whether you want to create a new account or associate the lead to the existing account.
- **Opportunity Name:** If you want to create an opportunity, complete this field by giving the opportunity a name. (We typically recommend that the name of an opportunity be the Account Name followed by a hyphen and then a summary of the product interest. For example: Amazon – New Hardware.) You don't have to create an opportunity record when you convert a lead. Some-times, the lead that you're converting is associated with an existing opportunity. In these situations, select the Do Not Create a New Opportunity upon Conversion check box to avoid creating a new opportunity. Then, see Chapter 10 for details on how to link contacts to existing opportunities.
- **Converted Status:** Salesforce pre-fills this field with the default value that your company has chosen for a qualified lead. Don't change this field unless your company has multiple selections for a qualified lead.
- **Task Information:** You can create a follow-up task right in these fields, but you don't have to. Complete these fields only if it saves you a step.

**Figure 9-8:**  
Converting  
a lead.

### 3. When you're done, click the Convert button.

If Salesforce finds a contact record that matches your lead, you can then decide to associate it with the existing contact record. Otherwise, a contact record appears for your former lead. That contact is linked to an account corresponding to the lead's Company field, and all associated records from related lists are carried over. If you chose to create an opportunity in Step 2, you can see the opportunity on both the account and contact record's Opportunity related lists.

## *Maintaining Your Lead Database*

If you're a system administrator or a lead manager who has the right permissions (we specify those permissions in the following sections), one of your greatest challenges is administering what hopefully will become a large pool of leads.

Lead databases can become unwieldy over time, so you need to keep them clean. For example, say you work for a company that regularly collects leads from industry conferences. After a year, your leads database might have many duplicates and plenty of garbage. Salesforce provides a number of simple tools to make short work of cleaning your leads and other tasks.

The biggest problems we see with leads involve assigning, identifying duplicate records and merging them together (also known as *de-duping*), transferring, archiving, and deleting. We know: You hate to get rid of anything. However, sometimes it's necessary and relatively painless.

## *Making use of lead queues*

If you have a sales team made up of multiple reps responsible for attacking leads collectively, you might want to set up lead queues. For example, some companies hire telemarketers to handle leads on a first-come, first-serve basis. You might just find that your reps work harder if they all have an equal chance to go after a fresh pool of leads.

If you're an administrator or user who has permission to customize Salesforce, you can set up lead queues. Follow these steps:

### 1. Choose Setup → Administration Setup → Manage Users → Queues.

A Queues page appears.

**2. Click New to create a new queue.**

The New Queue page appears in Edit mode, as shown in Figure 9-9.

**3. Name the queue and specify the Lead object to associate with this queue.**

**4. Add members to the queue.**

Members can be users, groups, or roles in your company who'll be part of the queue. For example, you might label the queue Western Field Sales and then choose users who make up the Western Sales team.

**5. When you're done, click Save.**

You can now use this queue when you organize and reassign lead records.



Lead queues can be viewed in the same place on your Leads home page where you view your custom lead views. The name of the lead queue is automatically added to the drop-down list for the lead views. Pretty neat, huh?

The screenshot shows the 'New Queue' page in Edit mode. At the top, there are 'Queue Edit' buttons for 'Save' and 'Cancel'. The main section is titled 'Queue Name and Email Address' and contains a text area with instructions: 'Enter the name of the queue and the email address to use when sending notifications, for example, when a case has been put in the queue. The email address can be for an individual or a distribution list. When an object is assigned to a queue, only the queue members will be notified.' Below this are input fields for 'Queue Name' (containing 'Western Field Sales') and 'Queue Email' (containing 'western@mycompany.co'). There is also a checkbox for 'Send Email to Members'. The next section is 'Supported Objects', which has a list of available objects and a 'Selected Objects' list containing 'Lead'. The 'Queue Members' section includes a search box with 'Roles and Subordinates' selected and a 'Find' button. Below the search box are two lists: 'Available Members' and 'Selected Members'. The 'Available Members' list includes roles and subordinates such as 'Customer Support, North America', 'Director, Channel Sales', 'Director, Direct Sales', 'Eastern Sales Team', 'Human Resources Rep', 'Installation & Repair Services', 'Marketing Team', 'SAP, Customer Service & Support', 'SAP, Human Resources', 'SAP, Sales & Marketing', 'SP, International Sales', 'Marketing', and 'SP, North American Sales'. The 'Selected Members' list is currently empty. At the bottom of the page are 'Save' and 'Cancel' buttons.

**Figure 9-9:**  
Creating a  
lead queue.

## *Creating assignment rules for automatic routing*

If your company generates a lot of leads, assignment rules can help distribute the workload and get leads to the right users. Assignment rules give you a better chance to keep leads from becoming stagnant. A lead *assignment rule* is a feature that lets the administrator define who should receive a lead and under what conditions. For example, if your reps have sales territories defined by ZIP codes, you can use those ZIP codes to dictate who gets what leads.

To create a lead assignment rule, follow these steps:

**1. Choose Setup → App Setup → Customize → Leads → Assignment Rules.**

If you haven't yet set the default lead owner, the Lead Settings page appears, asking you to select the default lead owner. The buck stops with this person or queue, as far as lead routing goes. After you make this selection, Salesforce returns you to the Lead Assignment Rules page.

**2. Click New to create a new assignment rule.**

The New Lead Assignment Rule page appears in Edit mode.

**3. Enter a title in the Rule Name field, select the check box if you want to make it the active assignment rule, and click the Save button.**

The Lead Assignment Rule page reappears. You can have only one active rule at any time, but the rule can have multiple entries. Click the rule name to go to the detail page for that rule.

**4. Click New on the Rule Entries related list.**

A Rule Entry Edit page appears.

**5. Complete the steps as follow:**

*a. Enter a number in the Order field to set the order.*

*b. Select criteria to define the rule.*

See the section “Creating custom lead views,” earlier in this chapter, for details on selecting criteria. In this case, you might enter *ZIP Code Equals 02474*.

*c. Use the drop-down list and Lookup icon to select the user or queue.*

*d. Use the Lookup icon to choose an Email Notification Template.*

You can set the assignment rules to send e-mail alerts to recipients of new leads.

**6. When done, click the Save button or the Save & New button.**

- *Save*: The New Lead Assignment Rule page reappears.
- *Save & New*: A new Rule Entry Edit page appears, and you can repeat Steps 5 and 6 until you finish.

## Transferring leads

You might need to transfer leads for a variety of reasons. For instance, after you set up your lead records in Salesforce, you need to give them to the right people. Or maybe some reps just weren't following up, so you took their leads away after swatting their noses with a rolled-up newspaper.

To transfer leads, you must be an administrator or a user with Manage Leads and Transfer Leads permissions. If you want to reassign many leads at the same time, take these steps:

**1. From the Leads home page, select a view from which you can see some leads that you want to reassign.**

The list page appears.

**2. In the Action column of the lead list, select the check boxes to the left of the lead records that you want to assign to someone else.****3. Click the Change Owner button at the top of the page.**

The Change Lead Owner page appears.

**4. Select the user or queue that you intend to reassign leads to, and then click Save.**

The lead list reappears, and the lead owners have been changed. The new lead owner can be optionally notified via e-mail of this ownership change. Just select the Send Notification Email check box before clicking the Save button.



If you're an administrator, you can use the Mass Transfer Leads tool in Setup to accomplish the same goals of reassigning en masse. See Chapter 23 for details on mass-transferring leads.

If you're reassigning one lead at a time, you can transfer ownership directly from a lead record. Follow these steps:

**1. On the lead record, to the right of the Lead Owner field, click the Change link.**

The link is in square brackets. The Change Lead Owner page appears.

2. **Select the user or queue that you're assigning the lead to.**

You use this same page when you're assigning multiple leads, but here, you can choose to notify the recipient with an e-mail.

3. **(Optional) Select the Send Notification check box to notify the new owner of the reassignment.**

4. **When you're done, click Save.**

The lead record reappears, displaying your ownership change.

## *Changing the status of multiple records*

An administrator or a user who has Manage Leads and Transfer Leads permissions can change the status of multiple records at the same time. This feature comes in handy if, during a process, a lead manager reviews leads prior to assigning them to reps.

To change the status of multiple leads at the same time, follow these steps:

1. **From the Leads home page, select a view.**

The list page appears.

2. **In the Action column of the lead list, select the check boxes to the left of the lead records that require a status change.**

To select all the leads in this view, select the check box to the left of the Action column header, which selects all the leads on this page.

For example, if you're eyeballing a list of leads from a tradeshow, you might select obviously bogus leads.

3. **Click the Change Status button at the top of the page.**

The Change Status page appears.

4. **Select a status from the New Status drop-down list and click Save.**

The lead list reappears.



If you require industrial strength de-duplication tools, a number of proven technology partners handle de-duplication with Salesforce, plus a variety of other data management tasks. You can check out these offerings on the AppExchange directory by searching for "Data Cleansing" in the search bar.

## *Mass-deleting lead records*

Periodically, be sure to delete records that are unqualified or of no value to your company. You must be an administrator to mass-delete records.



Some companies add a To Be Deleted value to their Lead Status field to denote garbage. Then, periodically, the administrator deletes those records.

If you want to delete multiple records at a time, follow these steps:

- 1. On the Leads home page, click the Mass Delete Leads link below the Tools heading.**

A Mass Delete Leads page appears, including a three-step deletion wizard.

- 2. Review the steps and then type the search criteria for the leads that you want to delete.**

For example, if you want to delete unqualified leads, enter a filter in which Lead Status Equals Unqualified.

- 3. Click the Search button.**

The page reappears, displaying your results at the bottom of the page.

- 4. Select all records or just the records that you want to delete by selecting the appropriate check boxes.**

To select all the search results for deletion, click the Select All link at the top of the list.

- 5. Click the Delete button when you complete selecting the records for deletion.**

The search results are updated to omit the record(s) you deleted.



When deleting records, always be cautious, but don't overly stress out. When you delete records, that information is placed in your Recycle Bin, and you can access as many as 5,000 records for 30 days. To undelete a record, click the Recycle Bin link on your sidebar, find the record, and undelete it. Then, count your blessings and breathe into a paper bag until the panic attack subsides.

## *Building Your Lead Database with Jigsaw for Salesforce*

Jigsaw (<http://www.jigsaw.com>) is an online directory of millions of business professionals that built up its database with a very simple quid pro quo model. For businesspeople researching others, in particular companies or industries, Jigsaw lets you view people's contact information in exchange for submitting or updating the contact information of someone within your network. I scratch your back, you scratch mine, as the saying goes, and everyone has an incentive to help keep the data accurate.

Jigsaw for Salesforce is a nifty app that helps both update and expand your leads (and accounts and contacts). Here's how it works:

1. It flags any of your lead data when there's a discrepancy between the information you have and what's in Jigsaw.

You get to choose which lead fields Jigsaw reviews to determine this and which flagged records you want updated. Don't worry: You can also lock certain records so they're not reviewed.

2. You can mine Jigsaw for new leads based on certain criteria (like Industry = Manufacturing) that you choose to build your own custom prospecting list.
3. Jigsaw for Salesforce searches the Jigsaw database for matches and adds them to your Salesforce database on a regular basis.

Jigsaw for Salesforce is available for the Professional, Enterprise, and Unlimited Editions for an additional cost. To get more information, visit the AppExchange (<http://www.appexchange.com>) and type **Jigsaw** into the search field.



## Chapter 10

# Tracking Opportunities

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### *In This Chapter*

- ▶ Demystifying opportunities
  - ▶ Creating new opportunities
  - ▶ Changing opportunity records
  - ▶ Organizing opportunity lists and contact roles
  - ▶ Using Chatter to follow opportunities
- 

Your sales pipeline is the lifeblood of your business. It's the list of deals that can help you achieve your sales targets. But try as you might, you can probably never close every deal in your pipeline. Things happen: Budgets get slashed, projects get tabled, roles change. So, you need enough deals to give yourself the chance to hit and exceed your goals in a given time frame.

An *opportunity* in Salesforce is a sales deal that you want to track. The opportunity record has tools to help you efficiently track and close a sale. By using Salesforce, you can manage more opportunities at the same time and pursue each opportunity with greater precision. For example, if you're a Salesforce sales rep, you can use opportunities to follow a standard process, link distribution partners, associate products, strategize against competition, record your actions and other notes, and more. And you don't have to waste precious time updating a pipeline spreadsheet. Instead, you or your manager can generate the current pipeline with the click of a button.

In this chapter, we show you the techniques and best practices for using opportunities to track sales. First, you find out the most reliable way to create opportunities. Then, we discuss how to view them in the manner that makes sense to you. You can also discover how to update your records so that your information is current.

## Getting Familiar with the Opportunity Record

An *opportunity record* is the collection of fields that make up the information on a deal you're tracking. The record has only two modes: In Edit mode, you modify fields; in Saved mode, you view the fields and the opportunity's related lists.

An opportunity record comes preconfigured with several standard fields. Most of these fields are self explanatory, but be sure to pay attention to these critical ones:

- ✔ **Amount:** This field displays the estimated amount of the sale. Depending on the way your company calculates the pipeline report, you might use numbers that include total contract value, the bookings amount, and so on.
- ✔ **Close Date:** Use this required field for your best guess as to when you'll close this deal. Depending on your company's sales process, the close date has different definitions, but this field is commonly used to track the date that you signed all the paperwork required to book the sale.
- ✔ **Expected Revenue:** This read-only field is automatically generated by multiplying the Amount field by the Probability field.
- ✔ **Forecast Category:** This field is typically hidden, but every opportunity automatically includes a value. Each sales stage within the Stage dropdown list corresponds to a default forecast category so that higher probability opportunities contribute to your overall forecast after they reach certain stages.
- ✔ **Opportunity Owner:** This person in your organization owns the opportunity. Although an opportunity record has only one owner, many users can still collaborate on an opportunity.
- ✔ **Opportunity Name:** This required text field represents the name of the specific deal as you want it to appear on your list of opportunities or on a pipeline report.

When naming opportunities, you and your company should define a standard naming convention for the Opportunity Name field so that you can easily search for and distinguish opportunities. We recommend that the Opportunity Name start with the Account Name, then a hyphen, and then the name of the customer's project or the product of primary interest. This naming convention makes for readable reports later.

- ✔ **Private:** If you want to keep an opportunity private, select this check box to render the record accessible to only you, your bosses, and the system administrator. This field isn't available in Team or Personal Editions.



- ✔ **Probability:** The *probability* is the confidence factor associated with the likelihood that you'll win the opportunity. Each sales stage that your company defines is associated with a default probability to close. Typically, you don't need to edit this field; it gets assigned automatically by the Stage option that you pick. In fact, your administrator might remove write access from this field altogether.
- ✔ **Stage:** This required field allows you to track your opportunities, following your company's established sales process. Salesforce provides a set of standard drop-down list values common to solution selling, but your system administrator can modify these values.
- ✔ **Type:** Use this drop-down list to differentiate the types of opportunities that you want to track. Most customers use the Type drop-down list to measure new versus existing business, but your system administrator can modify it to measure other important or more specific deal types, such as add-ons, up-sells, work orders, and so on.



When customizing your opportunity fields, take into consideration the patience and attention span of your end users. Keep the record as simple as possible to ensure that all your important fields actually get filled in. If you add many fields, you might make the opportunity record harder to use, which then puts user adoption of Salesforce at risk. At the same time, you'll have greater success with opportunities when you can easily capture what you want to track.

## Entering Opportunities

Before you can begin using Salesforce to close opportunities, first you must get the records into Salesforce. In the following sections, we discuss the best ways to create opportunities so that they link to the correct accounts, contacts, and other records.

### *Adding new opportunities*

The best method for creating a new opportunity is to start from the relevant account or contact record, which guarantees that the opportunity associates to the correct record, making the opportunity easily trackable. And, if you add the opportunity from a contact, you link both the account and the contact at the same time.

To create an opportunity, go to the relevant Account or Contact detail page and follow these steps:

1. **Select the Create Opportunity option from the Create New drop-down list on the sidebar.**

Alternatively, scroll down the detail page to the Opportunities related list and click the New button. The result is the same. The Edit mode of a new opportunity appears; see Figure 10-1. The Account Name field is conveniently filled in for you.

### 2. Fill in the fields as much as you can or as required.

At a minimum, you must complete the required fields. Depending on how you set up your opportunity record, you might have to fill in other required fields, which are highlighted in red. See the section “Getting Familiar with the Opportunity Record,” earlier in this chapter, for more detail on common required fields.

### 3. Click Save when you’re done.

The Opportunity detail page appears. You can click the Edit button on this page at any time if you need to modify the record.



If you have the good fortune to need to enter multiple opportunities, one after another, instead of clicking the Save button, click the Save & New button. A new opportunity record appears in Edit mode. You have to fill in the Account Name field, but this technique can save you time.

**Figure 10-1:**  
Completing  
opportunity  
fields.

## Cloning an opportunity

If you commonly create opportunities that are similar to each other, use the cloning feature to reduce unnecessary retyping. For example, if you’re an account manager who creates work order opportunities for additional

purchases from the same customer, you might want to clone an existing record and change the details.

To clone an opportunity, go to the opportunity record that you want to clone and follow these steps:

- 1. Click the Clone button at the top of the record.**

A new Opportunity Edit page appears, pre-filled with all the data from the previous record.

- 2. Modify the fields, as necessary.**

Pay close attention to content in required fields such as Close Date, Stage, and Opportunity Name because the information pre-filled in those fields might be incorrect for the new opportunity. Review data in other fields to ensure that the information is applicable to this new opportunity.

- 3. If your opportunity has products, select the Clone Products and Associated Schedules check box at the bottom of the page, as needed.**

If your company uses products in Salesforce, you can enable this check box to duplicate the products underlying an existing opportunity. See Chapter 11 for more information on using products.

- 4. When you're done, click Save.**

An Opportunity detail page for your cloned opportunity appears.



If your company has legacy databases that contain opportunities and you want this data in Salesforce, you can't use an import wizard to migrate your records like you can with leads, accounts, and contacts. If this is a current challenge, seek out your technical staff, system administrator, Salesforce rep, or a Salesforce consultant. With business guidance, a person with the technical know-how can use the Apex Data Loader to import opportunities and other records through the backend of Salesforce, which can help you avoid wasting time manually re-inputting opportunities. See Chapter 23 for additional tips and tricks on migrating data.

## *Modifying Opportunity Records*

After you add opportunities into Salesforce, you can make changes to your records when deals progress, stall, or fade away. In the following sections, we cover three common practices: editing, sharing, and reassigning.

## *Updating opportunity fields*

In the course of working with your opportunities, you inevitably collect information that you want to save directly in the opportunity record. Every time you capture important data on your opportunity, remember to update your record by doing the following:

**1. Click the Edit button on the opportunity.**

You can also hover your mouse over the field. If a pencil icon appears to the right of the field, double-click the field to edit it.

Alternatively, if you're already in an account or contact record that's linked to the opportunity, scroll down to the Opportunities related list and click the Edit link to the left of the desired opportunity. The result is the same. The Opportunity Edit page appears.

**2. Update the fields, as necessary, paying particular attention to keeping fields such as Amount, Close Date, and Stage up to date.**

Nine out of ten times, those fields play a key role in your company's sales pipeline reports. By keeping your information up to date, you and other users can get a true measure on the opportunity's progress.

**3. When you're done, click Save.**

The opportunity reappears in Saved mode. The fields that you edited are changed.



You can keep track of certain critical updates to your opportunity record by using the Stage History related list. Any time you or one of your team members who has read-write access to your record modifies the Stage, Probability, Close Date, or Amount fields, you can see who modified the record and when. Sales managers can use this data in reports to measure progress and trends on opportunities. See Chapter 18 for further details on using and customizing opportunity reports.

## *Rolling up opportunity data onto the account record*

The opportunity record carries a great deal of information about an account. By collecting key opportunity field information onto an account record, a sales rep can quickly see how valuable a particular customer is by viewing the total number of licenses a customer currently has, how much business a customer has closed with your company, and the highest deal closed with that customer, to name a few examples.

You can aggregate this summary information in two ways:

- ✓ Run a report that summarizes this information for you. (See Chapter 18 for more details on creating reports.)
- ✓ Your Salesforce administrator can choose which opportunity fields you want summarized automatically on the account record.

To create a custom roll-up of your opportunity data onto the account record, choose Setup→App Setup→Customize→Accounts→Fields and follow these steps:

- 1. In the Account Custom Fields and Relationships section, click the New button.**

The New Custom Field Wizard opens.

- 2. Select the Roll-Up Summary radio button and click Next.**

- 3. Enter the name of what you're summarizing in the Field Label field and click Next.**

The Field Name field automatically populates itself based on what you enter in the Field Label. In this example, you type **Total Deals Closed**.

- 4. In the Summarized Object picklist, select Opportunities.**

Identifying the Summarized Object tells Salesforce which records you want combined and summarized on the account record.

- 5. Select the roll-up type from the selection of radio buttons in the Select Roll-Up Type section in the middle of the page. Click Next.**

This selection tells Salesforce how you want the field of your choice to be summarized. You can choose a count of records, the sum, the minimum value, or the maximum value. If you choose any of the latter three options, you also have to identify which field in the opportunity you want summarized by using the Field to Aggregate picklist to make their choice.

You can filter out certain criteria in your result set.

If you want to summarize only records that meet certain criteria, select the Only Records Meeting Certain Criteria Should Be Included in the Calculation radio button to reveal a set of filter criteria. For example, you may want a sum of all the Amount fields for opportunities in which the Stage equals Closed Won. (Figure 10-2 shows an example of defining the field calculation.)

- 6. Select which Profiles should be able to view the new field and click Next.**

- 7. Select on which Page Layout(s) the field should be displayed and click Save.**

**Figure 10-2:**  
Defining an  
opportunity  
roll-up field  
calculation.

## Reassigning opportunity ownership

You might find that after you set up your opportunities in Salesforce, you need to give them to the right people. Or your sales teams might be set up in a hunter/farmer configuration, in which you reassign closed opportunities from new business reps to account managers at a certain time.

If you want to reassign an opportunity, open the Opportunity detail page and follow these steps:

1. **To the right of the Opportunity Owner field, click the Change link, which appears in square brackets.**

The Ownership Edit page appears, as shown in Figure 10-3.

**Figure 10-3:**  
Reassigning  
an  
opportunity.



2. **Select the user to whom you're assigning the opportunity.**

3. **(Optional) Select the Send Notification Email check box.**

The recipient gets notified of the reassignment via e-mail.

4. **Select the Keep Sales Team check box to retain the sales team.**

If your company doesn't use Sales Teams, you don't see that particular check box.

5. **When you're done, click Save.**

The opportunity record reappears. The Opportunity Owner field has changed to the assigned user.

## Organizing Your Opportunities

When you have all or a portion of your opportunities entered in Salesforce, you can begin to organize them to suit the way that you sell.

In the following sections, you can find out how you can use views and other tools from the Opportunities home page to provide greater focus for you and your sales teams. Then, for even more robust organization of your opportunity information, check out Chapter 18 for specifics on how to use standard and custom opportunity reports.

### Using opportunity views

An *opportunity view* is a list of opportunities that match certain criteria. When you select a view, you're basically specifying criteria to limit the results that you get back. The advantage of a view, versus searching, is that you can use this view over and over again. For example, if you're one of many sales reps, you probably want to see only your opportunities. On the Opportunities home page, Salesforce comes preset with several defined views:



✓ **All Opportunities:** Lists all the opportunity records entered into Salesforce

Depending on the way your company has set up your security model, you might not see this view or its results.

✓ **Closing Next Month:** Displays opportunities in which the close date falls in the following month

✓ **Closing This Month:** Displays opportunities in which the close date falls in the current month

- ✔ **My Opportunities:** Gives you a list of just the opportunities that you own in Salesforce
- ✔ **New This Week:** Generates a list of opportunities that have been created since the beginning of the week
- ✔ **Recently Viewed Opportunities:** Lets you look at a list of opportunities that you've recently viewed
- ✔ **Won:** Shows opportunities to which you have access that have been closed and won

To try out a predefined view, do the following:

1. **On the Opportunities home page, click the down arrow on the View drop-down list.**

Depending on how your company has customized the views, you might see all or none of the options in the preceding bulleted list as well as some other choices that might have been created for you.

2. **Select the My Opportunities view.**

A list page appears, showing opportunities that you currently own. Salesforce lays out the list with six standard columns that correspond to commonly used opportunity fields, plus an Action column so that you can quickly modify a record.

3. **Click a column header to re-sort the list page.**

For example, if you click the Close Date header, the list page re-sorts by the close dates entered on your opportunity records.

4. **Go to the opportunity record by pointing and clicking an underlined link in the Opportunity Name column.**

An Opportunity detail page appears.

5. **Click the Back button on your browser and then click the Edit link on the same row as the opportunity you just clicked.**

The opportunity record appears in Edit mode, and you can make changes to the data.

Click the Save button on the opportunity before navigating away from it.



## *Creating custom opportunity views*

If you want special lists for the way that you manage your opportunities, you should build custom views. For example, if you want to see only open opportunities closing this month at or above 50 percent, you can create a view that helps you focus on just that part of the pipeline.

To build a view from scratch, follow these simple steps:

**1. On the Opportunities home page, to the right of the View drop-down list, click the Create New View link.**

The Create New View page appears.

**2. Name the view by entering text in the Name field.**

In the example used in the preceding section, you might call the view *Closing This Month >= 50%*.

**3. Select the appropriate radio button, depending on whether you want to search All Opportunities or just My Opportunities.**

**4. In the Search Criteria step, select your search criteria.**

A basic criteria query is made up of three elements:

- *Field:* In the first drop-down list, you can find all the fields on the opportunity record. An example is the Probability field.
- *Operator:* The second drop-down list offers operators for your search. That might sound complicated, but it's easier than you think. Taking the example a step further, you'd select the Greater or Equal option from the drop-down list.
- *Value:* In the third box, you type the value that you want in the search. For this example, you'd type **50** because you want to see only those opportunities that are greater than or equal to 50 percent probability.

**5. Select the columns that you want displayed.**

Although the preset views in Salesforce display common fields, such as Stage and Amount, you can select up to 15 opportunity fields to display on your custom view page.

**6. Decide whether you want others to see your custom view.**

Your decision is simple if you don't see the Visibility step. Otherwise, select the appropriate option, depending on whether you want to share your view with others. Your options are basically all, none, or limited. If you choose limited accessibility, use the Available for Sharing and Shared To list boxes to select which users can see the view.

**7. When you're done, click Save.**

A new view appears, based on your custom view criteria. If you don't get all the results you anticipate, you might want to recheck and refine the search criteria.

## Defining contact roles

Depending on your sales process, at some early point, you need to identify the decision makers who'll influence the buying decision. Contacts and their titles often don't tell the whole story about decision makers and the chain of command within an opportunity.

To better define the buying influences on an opportunity, go to an opportunity record and follow these steps:

1. **Click the New button on the Contact Roles related list.**

The Contact Roles page appears for that specific opportunity, displaying a list of the available contacts linked to the related account. See Figure 10-4.

Primary	Contact	Role
<input checked="" type="radio"/>	No Primary Contact	
<input type="radio"/>	Peter Kaufman	Business User
<input type="radio"/>	Jill King	Economic Buyer
<input type="radio"/>	Greg King	Economic Decision Maker
<input type="radio"/>	Justin Davis	None
<input type="radio"/>		None
<input type="radio"/>		None
<input type="radio"/>		None
<input type="radio"/>		None
<input type="radio"/>		None
<input type="radio"/>		None
<input type="radio"/>		None
<input type="radio"/>		None
<input type="radio"/>		None
<input type="radio"/>		None
<input type="radio"/>		None

**Figure 10-4:**  
Selecting  
the contact  
role.

2. **For each relevant contact, use the Role drop-down list to select the appropriate role.**

Salesforce comes preconfigured with a standard list of contact roles, but your company can customize this drop-down list if you need to modify the list of values. You don't have to classify a role for every contact on the list; you can just leave the Role default value of None.

If the right role for your contact doesn't appear, advise your system administrator to edit the roles.



### 3. Select a radio button to designate the Primary Contact.

The Primary Contact typically refers to the person who's currently your point of contact. One of the benefits of selecting a Primary Contact is that you can list who the primary contact is on a basic opportunity report.

### 4. (Optional) Click the Lookup icon to the right of empty fields in the Contact column to add other contacts who are critical to your opportunity.



If you work with multitier selling models or if you collaborate with business partners on your deals, use contact roles to add contacts who aren't employees of an account. For example, if your customer's legal gatekeeper works for an outside law firm, you can use the Contact Roles related list to highlight the attorney's role.

### 5. When you're done, click Save.

The Opportunity detail page reappears, and your Contact Roles related list is updated to reflect contacts involved in the opportunity. If you need to add more contact roles, click the New button on the Contact Roles related list again.

## Following Opportunities with Chatter

If you work as part of a sales team or just have a lot of deals to keep track of, Salesforce can bring you the news on your opportunities as it happens. You are automatically set to follow updates on any opportunity you create, but sometimes, you don't want to hunt down what's happening on someone else's opportunity.

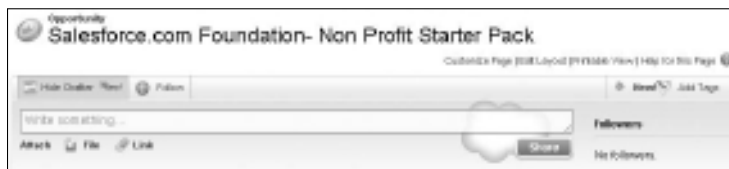
You can follow an Opportunity record by following these steps:

#### 1. Click the New button on the Contact Roles related list.

The Opportunity page appears for that specific opportunity, displaying your Chatter feed with your current status at the top, as shown in Figure 10-5.

For more information on how to use Chatter, see Chapter 6.

**Figure 10-5:**  
Following an opportunity.



- 2. To follow the chatter on this opportunity, click the Follow button with the green circled plus sign.**

The Opportunity page appears for that specific opportunity, displaying the latest Chatter with your current status at the top and the Follow button now appearing as an Unfollow button.

Now whenever there's activity on this opportunity, it appears in your Chatter feed displayed on your home page.

When you're ready to stop following this opportunity, click the Unfollow button with the gray circled minus sign.

## Chapter 11

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# Tracking Products, Price Books, and Quotes

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### *In This Chapter*

- ▶ Defining products and price books
  - ▶ Using products and price books
  - ▶ Creating products
  - ▶ Establishing and updating product schedules
  - ▶ Maintaining product lists and price books
  - ▶ Generating quotes
- 

**A** *product*, as its name implies, is a product or service that you sell to customers. Products are the individual line items that make up an *opportunity*. Depending on your goals for Salesforce, you might not need to immediately incorporate Salesforce's product-type features into your opportunities. But if you sell multiple products and services and you struggle with product-level visibility, Salesforce provides powerful and easy tools to implement solutions for Professional, Enterprise, and Unlimited Edition users.

Using products in Salesforce benefits sales reps and people in product marketing, management, and development throughout your organization. Sales reps can quickly locate the price of a product and select products to calculate an opportunity's amount. Marketing, management, or development professionals can get vital sales information to support strategic business planning, new product development, and product lifecycle management.

In this chapter, we show sales teams how to use products and price books with opportunities (if your administrator has already set that up). Before setting up products and price books, though, administrators first need to do some advanced planning. We discuss how to create a product catalog, set up schedules, and build price books. We then show you how to maintain products and price books on an ongoing basis to facilitate your sales goals. We conclude this chapter by showing you how to generate quotes that incorporate items from your product catalog so that you can e-mail them to your contacts.

## Discovering Products and Price Books

You need to know two key and interrelated terms before you can begin planning your product strategy in Salesforce.



✓ **Products:** Individual items that you sell through your opportunities. All products belong to one universal product catalog. After you create a product, though, you can associate it to one or multiple price books with identical or different prices. For example, you may use multiple price books if you use one set of prices when selling to qualified non-profit agencies and a different price list for companies in the private sector.

A product can have an associated *schedule* based on quantity, revenue, or both. If you sell products and break out schedules to forecast revenue recognition or for planning, you can use Salesforce to reflect important schedules for products linked to opportunities.

To access the Products home page, click the Products tab. If you can't see that, confirm that the Force.com drop-down list in the upper right of the screen is set at Sales (versus something like Call Center). If you still don't see it, check with your system administrator.

✓ **Price book:** A collection of products and their associated prices. A product with its associated price is a *price book entry*. You can also create custom price books based on your unique sales model.

You can associate a price book, add products, and build schedules on an opportunity through the Products related list on an Opportunity detail page.

## Defining standard product fields

A product record consists of a number of fields that you use to capture information about a product you sell. If you're involved in shaping products for your company, most of the standard fields are obvious. If you want specific definitions, click the Help link in the top-right corner of Salesforce.

Here are a couple of important pointers on understanding the standard product record fields:

✓ **Product Name:** The name of your product. Make sure to use titles that are clear and familiar to your sales reps and customers.

✓ **Product Code:** An internal code or product ID used to identify your product. If your existing products and product codes reside in a financial database and you want to plan for integration, make sure that the product codes are consistent.



- ✔ **Product Description:** Text to distinguish products from each other. If you're in product management or marketing, describe your products so that they're obvious and useful for your sales teams.
- ✔ **Product Family:** The category of the product. Use this drop-down list when building reports that reflect sales data by product category. For example, if you work for a technology value-added reseller (VAR), you might want to reflect your pipeline by families that include hardware, software, services, training, and maintenance. You can set up products in Salesforce so that each product automatically maps to a product family.
- ✔ **Active:** This check box must be selected to make the product available to your users.
- ✔ **Quantity Scheduling Enabled:** Select this check box to enable quantity scheduling for a product. If you don't see this check box, your administrator hasn't enabled it.
- ✔ **Revenue Scheduling Enabled:** Select this check box to enable revenue scheduling for a product. If you don't see this check box, your administrator hasn't enabled it.

## *Understanding the different types of pricing*

Salesforce allows you to customize your pricing based on the way you sell. If you use products in Salesforce, your company has three different options for pricing:

- ✔ **Standard Prices:** Default prices that you establish for your products when you set up your standard price book
  - ✔ **List Prices:** Prices that you set up for custom price books
  - ✔ **Sales Price:** Price of a product determined by the sales rep when he adds a product to an opportunity
- See the following section for details on adding products to opportunities.

## *Using Products and Price Books*

Sales reps can add products with specific prices to their opportunities, and Salesforce automatically calculates the Amount field on an opportunity record. If you're a sales rep selling multiple products and managing multiple opportunities at the same time, you can take the frustration out of remembering what you offered to a customer. If you're a sales manager, you

can segment your pipelines and forecasts by product lines. And if you're in product management or marketing, products in Salesforce can give you real insight into product demand from your markets.

## *Adding products to opportunities*

To take advantage of products, your company must first set up a product catalog as well as one or more price books. See the section “Building the Product Catalog,” later in this chapter, for the how-to details on setting up your products and price books. After this is done, sales reps can add products to an opportunity by going to a specific opportunity and following these steps:

- 1. Scroll down the Opportunity detail page to the Products related list and then click the Choose Price Book button.**

A Choose Price Book page appears. If your company has made only one price book available to you, you can bypass this step and start with Step 2.

- 2. Select the appropriate price book from the Price Book drop-down list and then click Save.**

The Opportunity detail page appears again. The Products related list now shows the name of the price book in parentheses.

On an opportunity, you can use only one price book at a time.

- 3. Click the Add Product button on the Products related list.**

A Product Selection page appears, as shown in Figure 11-1. This shows all the products in your selected price book.

- 4. If the resulting list of products is too long for your tastes, you may narrow down the results by entering a keyword or filter criteria, and then clicking the Search button to begin your search.**

The page reappears with your search results in a table at the bottom of the page.

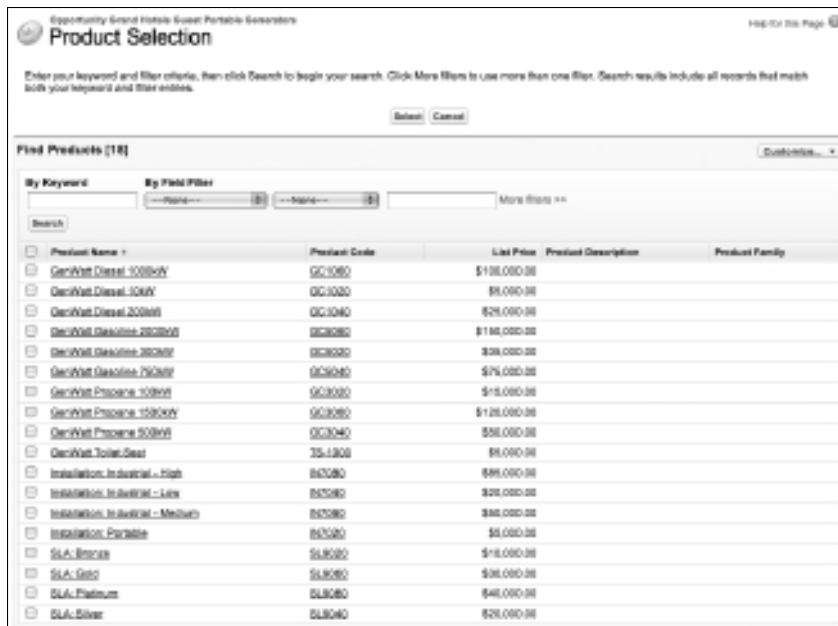
- 5. Select the check boxes next to the products that you want, and then click the Select button.**

An Add Products page appears with your selections and fields for you to provide line item details. The Sales Price field is prefilled with the default sales price from the price book that you selected.

- 6. Fill in the line item details.**

You must, at a minimum, fill in the Quantity and Sales Price fields for each selected product. The Date field is typically used to reflect an expected shipping or delivery date for the product.





**Figure 11-1:**  
Finding your  
products.

### 7. When you're done, click the Save button or the Save & More button.

Clicking the Save & More button takes you back to the Product Selection page. If you click the Save button, the Opportunity detail page reappears. Notice that the Amount and Quantity fields on the opportunity record have changed based on the total from the products you added.

## Updating product details for an opportunity

If you need to change the details on your product selections in the course of the sales cycle, you can do this easily on the Products related list of the opportunity record. For example, if your customer wants to add another product, increase product quantities, or demand a better product discount, you need to know how to modify products.

To modify products on your opportunity, we suggest the following:

- ✓ **Delete a product from the opportunity.** Click the Del link next to the product on the Products related list.
- ✓ **Edit all the products on the opportunity.** Click the Edit All button.

- ✔ **Edit one product at a time.** Click the Edit link next to the product on the related list.
- ✔ **Reorder the products on your Products related list.** Click the Sort button.



If you find yourself unable to modify the sales price on your products, you may want to politely confirm the intent with your sales manager. Some companies lock in the sales price for sales reps so they must adhere to a predefined discount approval policy.

## *Adding and updating schedules on opportunities*

If you manage opportunities in which your products or services are delivered over time, you can create schedules for your products by quantity, revenue, or both. By using schedules, you and your users can benefit in multiple ways:

- ✔ **If you're on a sales team:** You get a gauge on revenue recognition, which could be significant if that affects compensation.
- ✔ **If you're in product management:** You can better forecast and plan for the amount of units that you'll have to deliver in future quarters.
- ✔ **If you're part of a services organization:** Schedules updated by reps provide a real-time gauge in planning your resources and projects.



Your system administrator must first set up your products with scheduling. (See the section “Setting Up Schedules,” later in this chapter, for more specifics on schedules, and see Chapter 21 for the details on customizing Salesforce.)

After scheduling is enabled for a product, set up a schedule by going to the Opportunity detail page and following these steps:

- 1. Click the desired product in the Product Name column of the Products related list.**

An Opportunity Product page appears with a Schedule related list.

- 2. Click the Establish button on the Schedule related list.**

An Establish Schedule page appears.

- 3. Complete the fields and click Save.**

Your fields might vary, depending on whether the product is set up for quantity, revenue, or combined scheduling. When you click Save, a schedule appears based on your choices.

#### 4. Review and modify the schedule.

If the revenues or quantities aren't equal over the periods that you first established, you can type over the values in the schedule.

#### 5. When you're done, click Save.

The Opportunity Product page reappears with the schedule you established.

Over the course of an opportunity, if terms change, you can adjust the schedule on a product by clicking the buttons on the Opportunity Product page. To access an Opportunity Product page, go to the relevant opportunity record, scroll down to the Products related list, and click the desired product link from the Product column. The Opportunity Product page for the selected product appears with a Schedule related list. You can do the following with the schedule:

- ✓ **Modify the schedule.** Click the Edit button.
- ✓ **Delete the schedule.** Click the Delete button.
- ✓ **Establish the schedule all over again.** Click the Re-establish button.

## Searching for products

You can search for specific products easily by using the Find Products search tool on the Products home page.



Instead of searching from the Products home page, you can search for products from your main home page. Your administrator must set this up for your company. For details on adding this home page tool, see Chapter 21 for customizing Salesforce and consult with your administrator.

To search for a product, go to the Products home page and follow these steps:

#### 1. Enter keywords in the Find Products search tool and then click the Find Product button.

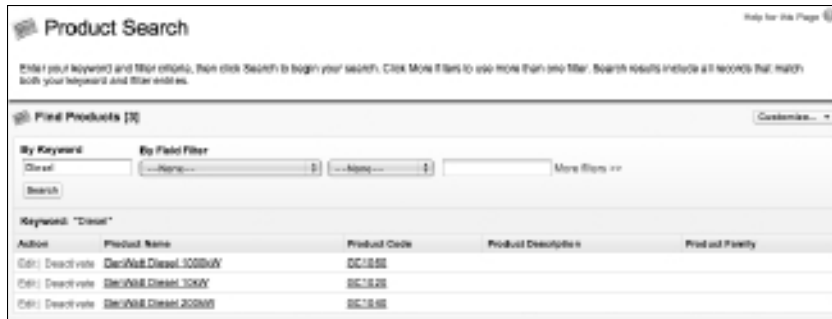
A Product Search page appears with a list of possible selections, as shown in Figure 11-2.

#### 2. If necessary, use the Find Products search tool to enter more keywords or filters to refine your search and again click the Find Product button.

The list results change based on your criteria.

#### 3. Click a link in the Product Name column to go directly to the product.

The Product detail page appears.



**Figure 11-2:**  
Search for a  
product.

## *Creating custom views for products and price lists*

If the existing lists don't provide the views that you want, you can create custom views for products and price lists. You can define your views to see additional standard or custom fields in list form. See Chapter 4 for details on creating custom views.

## *Building the Product Catalog*

If you have a vested interest in your product strategy, be aware and take advantage of all the options that Salesforce provides for customizing products and price books. The more you plan ahead, the better you can implement products and price books for how your sales teams sell. As you make products and price books active, your sales reps can start associating products to their opportunities.

## *Planning products for success*

For products, consider the characteristics of your products outside the standard realm that you want to analyze. In most companies, the product management or marketing teams own and maintain these records. You should pull together a cross-functional team made up of sales, marketing, finance, and product management users to decide what you want to achieve from products in Salesforce. Then work with your system administrator to customize the product record to meet your specific needs. For more details on customization, see Chapter 21.

For pricing, consider whether to have set pricing on your products or whether you prefer to keep the pricing simple at the beginning. Many customers of Salesforce, for example, set the prices on their products at \$0 or \$1 and then depend on their sales reps to fill in the sales prices when they prepare an opportunity. Other companies invest time and effort in creating actual standard or list prices on products to provide guidance to their sales reps.

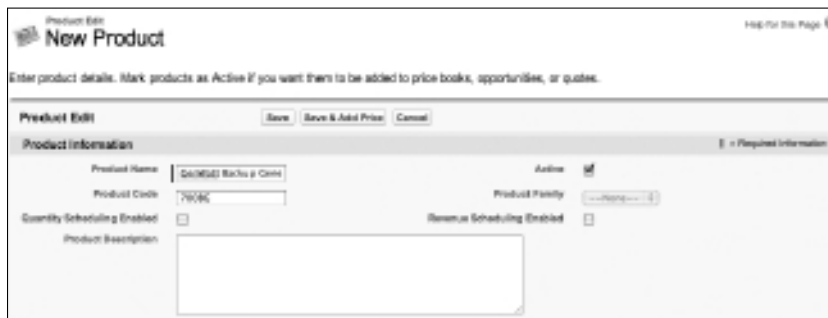
## *Adding products to the product catalog*

Before your sales reps can begin linking products to their opportunities, you need to add the products into Salesforce.

To add a product, log in to Salesforce and follow these steps:

- 1. Select the Create Product option from the Create New drop-down list on the sidebar.**

A New Product page appears, as shown in Figure 11-3.



**Figure 11-3:**  
Add a  
product to  
the product  
catalog.

- 2. Complete the fields.**

Your exact fields might vary, but see the section “Defining standard product fields,” earlier in this chapter, for info on the standard fields.

- 3. When you’re done, click Save.**

The Product detail page for your new product appears with related lists for standard prices and price lists.

## Changing product details in the product catalog

Over time, marketing or product managers may need to update details about a product. You can make most of your changes to a product from its detail page. Go to a specific product and take a look at this list of actions that you can perform. (You must have “edit” permissions on products to perform these steps. See Chapter 20 for details on granting the right permissions to the right people.)

- ✓ **Edit the product record.** Click the Edit button. For example, if the name of your product changes, you can change the product name, and then save and automatically update all opportunities that include that product with the modified name.
- ✓ **Delete the product.** Click Delete and then click OK in the dialog box that appears. In circumstances in which you’re no longer offering a product but it’s linked to opportunities, it’s better that you deactivate or archive the product rather than delete it. See the following bullets.
- ✓ **Deactivate the product.** Click the Edit button, deselect the Active check box, and then click Save. Take this path if you might offer the product in the future.
- ✓ **Delete and archive the product.** Click Delete and then click OK in the dialog box that appears. In the event that your product is linked to opportunities, a Deletion Problems page appears with suggested options. Click the Archive link if you’re still intent on deleting the product but not altering the existing opportunities.



If you want to keep your sales reps informed of any changes to your products (for example, if a product is no longer offered, or if its name changed), you can use Salesforce Chatter so that any changes to a product’s status or its name are reported in a Chatter feed. Interested users need to just follow the actions of the person who makes those changes (usually someone in Sales Operations), or they can follow the specific product, too. (See Chapter 6 for more information on setting up Chatter and its feeds and following users and records.)

## Setting Up Schedules

If your company wants to track annuity streams, stay aware of key shipping dates, or estimate when revenue will be recognized on products, you can also set up schedules on all or some products.



## Enabling schedules for your company

Your administrator first needs to enable schedules before you can add them on specific products.



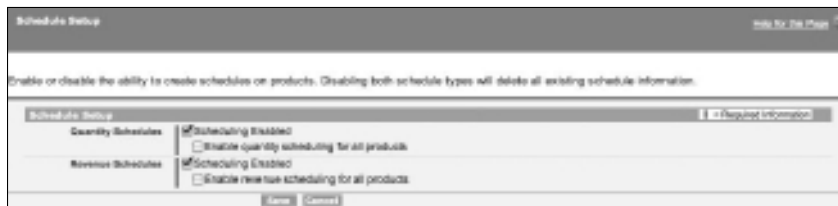
If your company wants to track shipping dates with Salesforce, you need to enable *quantity scheduling*. If your company wants to measure revenue recognition or anticipate upcoming payments, be sure to enable *revenue scheduling*. If your company wants to do both, you'd enable both types of scheduling.

To set up schedules, follow these steps:

### 1. Choose Setup⇨Customize⇨Products⇨Schedule Setup.

The Schedule Setup page appears, as shown in Figure 11-4.

**Figure 11-4:**  
Enable  
schedules  
for your  
company.



### 2. Select the appropriate check boxes.

You can choose to enable schedules based on quantities, revenue, or both. You can also choose to enable schedules for all products.

### 3. When you're done, click Save.

The Products page reappears.

## Adding and updating a default schedule

After schedules have been enabled, you can create default schedules on existing products or while you're adding new products.

By creating default schedules, you can simplify repetitive tasks for sales reps. With this setting, a default schedule is created when a sales rep adds a product to an opportunity. A sales rep can still re-establish a product schedule on an opportunity. The product date determines the start date for the installments.



If you sell a basic service with different payment plans, consider creating a unique product for each payment plan and then using default revenue schedules. By doing this, you can simplify the data entry for the rep and reduce the chance of error.

To create a default schedule, follow these steps:

**1. Select the Create Product option on the sidebar or click the Edit button on a product record.**

A Product page appears in Edit mode. If scheduling is enabled, you see additional fields for quantity and/or revenue scheduling.

**2. Complete the fields, as appropriate.**

Here are some tips on completing the default schedule:

- *Schedule Type*: Select Divide if you want to divide the opportunity amount into installments. Select Repeat if you want to repeat the quantity or revenue on each installment.
- *Installment Period*: Define the frequency.
- *Number of Installments*: Define the duration.

**3. When you're done, click Save.**

The Product detail page appears.



If your product has both quantity and revenue default scheduling, quantity scheduling is calculated first and drives the total amount. Then, revenue scheduling divides the amount.

To update a default product schedule, follow these steps:

**1. From the Products home page, search for the product whose schedule you'd like to update, using your preferred method.**

See the “Searching for products” section, earlier in this chapter, for specifics. A Product Search page appears.

**2. Click the product name of the specific product to edit.**

The Product page appears.

**3. Click the Edit button to update schedule information.**

**4. When you're done, click Save.**

The Product page for your product appears with the updated information.

## Managing Price Books

Some companies require just one universal price book. Many other companies, however, want custom price books based on their unique selling needs. Examples include price books that are based on the following:

- ✓ **Geography:** For a global company, the Japanese sales team might sell a subset of the products sold by their North American counterparts (and at different prices and in different currencies).
- ✓ **Partner tiers:** In some companies that sell via partners, strategic partners might get preferential pricing.
- ✓ **Sales teams:** If your company is divided into sales teams that sell different products, you can use custom price books to simplify the product selection for groups.
- ✓ **Volume discounts:** Some companies build price books based on volume purchases.
- ✓ **Seasonality:** Some companies change their pricing based on seasonal buying patterns. You can use custom price books to communicate pricing changes to your sales reps during these periods.

If the standard price book meets your objectives, keep it simple. Otherwise, in the following sections, we show you how to set up your price books.

### *Adding to the standard price book*

Every time you add a standard price to a product, you automatically associate it to the standard price book. You can do this while you're creating products, or you can add the standard prices after you've built the product records.

#### *Adding standard prices while creating products*

The easiest way to add a standard price is while you're creating products. To use this method, start creating a product record as you normally would; see the section "Building the Product Catalog," earlier in this chapter. Instead of clicking Save, though, follow these steps:

- 1. Click the Save & Add Price button (refer to Figure 11-3).**

An Add Standard Price page appears, as shown in Figure 11-5.

- 2. Complete the field and click Save.**

The Product detail page appears, and a standard price displays on the Standard Price related list.



**Figure 11-5:**  
Add a standard price.

### *Adding or editing standard prices for existing products*

You can also create the products first and add prices later. To add or edit a standard price, go to the desired Product detail page and follow these steps:

- 1. Click the Add button on the Standard Price related list.**

If standard prices already exist, you can click Edit or Edit All. The result is the same: An Add or Edit Standard Price page appears.

- 2. Complete or modify the Standard Price field, as necessary, and then click Save.**

The Product detail page reappears with any changes reflected on the Standard Price related list.

## *Creating a custom price book*

To create a price book, you need to be an administrator or have permission to manage price books.

To create a price book from scratch, go to the Products home page and follow these steps:

- 1. Click the Manage Price Books link under the Maintenance section, near the bottom of the page.**

A Price Book page appears with related lists for active and inactive price books.

- 2. Click the New button on the Active Price Books related list.**

A New Price Book page appears in Edit mode.

- 3. Complete the fields.**

Select the Active check box if you want to make the price book available.

- 4. When you're done, click Save.**

The Price Book detail page for your new price book appears with a Products related list.



## *Adding products to a custom price book*

After the price book has been established, you can add products to it. A product listed on a price book is also referred to as a *price book entry*. To add products to an existing price book, go to a price book and follow these steps:

**1. Click the Add button on the Products related list.**

A Product Selection page appears with a search tool and a list of products.

**2. Enter keywords and filter criteria, and then click the Search button to narrow your search.**

The Product Selection page reappears with a list of products based on your search criteria.

**3. Use the check boxes on the search results to choose products and then click the Select button.**

An Add List Price page appears.

**4. Complete the fields.**

Select the check boxes in the Use Standard Price column if you want to use the standard price for the list price of a product or just enter a list price. You can select the Active check boxes to make products immediately available in the price book.

**5. When you're done, click Save (or Save & More if you want to find more products).**

After you save the product, the Price Book detail page reappears, and your selected products have been added to the Products related list.

## *Making global changes to price books*

Maintaining accurate and up-to-date product and price lists is challenging, especially if you have an extensive product catalog and/or complex pricing. If you're responsible for such a daunting task, you can use tools that are located on the Products home page to save time.

### *Changing activation on price books*

There are times when you'll want to make a price book unavailable to sales reps. Maybe you had to raise prices on a family of products, or you stopped selling a product line. You probably need to preserve the current price book because existing customers and some prospects are still being associated to those products and prices, but new customers will need to be tied to the new catalog. Rest assured that you can deactivate one or more price books almost instantly so that sales reps won't be able to tie new opportunities to old information.

To deactivate a price book, go the Products home page and follow these steps:

**1. Click the Manage Price Books link under the Maintenance section.**

The Price Book detail page appears with related lists for active and inactive price books.

**2. On the Active Price Books related list, click the Deactivate link next to a price book that you want to make unavailable.**

The Price Book detail page reappears, and the selected price book now appears on the Inactive Price Books related list.

To reactivate price books, you follow a similar process, the difference being that you click the Activate link adjacent to a price book listed on the Inactive Price Books related list.

### *Cloning price books*

On occasion, you might want to create a price book that closely resembles an existing price book. Instead of starting from scratch, you can clone from an existing price book and then make changes, as necessary.

To clone a price book, follow these steps:

**1. Click the Manage Price Books link under the Maintenance section.**

The Price Book page appears with related lists for active and inactive price books.

**2. Click the New button on the Active Price Books related list.**

A New Price Book page appears.

**3. Complete the fields and use the Existing Price Book drop-down list to select a price book to clone.**

**4. Rename the clone in the Price Book Name field, and give it a description in the Description field. Select the Active check box when you want the new price book to be available to others for use.**

**5. When you're done, click Save.**

The new Price Book page appears with a Products related list cloned from the existing price book.

**6. If needed, click Edit or Edit All on the Products related list to change the list prices.**

**7. If needed, click Add or Delete on the Products related list to add or delete price book entries.**



### *Deleting price books*

You can delete price books, but if the price book is associated with existing opportunities, beware. In those circumstances, we recommend the following actions:

- ✓ Deactivate (rather than delete) the price book so that the linkage between opportunities and products stays intact.
- ✓ Delete the associated opportunity records first, and then delete the price book.
- ✓ Archive the price book entries prior to deleting. Then, even if you delete the price book record, the products associated with opportunities are retained.

If you still want to delete a price book, follow these steps:

- 1. On the Products home page, click the Manage Price Books link under the Maintenance section.**

The Price Book detail page appears with related lists for active and inactive price books.

- 2. Click the link for the desired price book.**

The specific Price Book page appears.

- 3. Click Delete and then click OK in the dialog box that appears.**

If you select a price book that isn't associated with opportunities, you return to the Price Book detail page with the lists of price books. If a Deletion Problems page appears, follow the suggestions provided in the preceding bulleted list and on the Deletion Problems page.

## *Generating Quotes*

Since the last edition of this book, Salesforce now has the ability to generate quotes from the product and price book information collected in your opportunities. Now you can make PDFs of quotes to e-mail to customers, and a complete history of what you've created is automatically stored within Salesforce. From the initial creation of a lead, to when you're sending your prospect a quote for new business, Salesforce helps you all the way. You'll still need to use your savvy sales skills to get your prospect to agree to what you're actually quoting, but that's where the art of sales balances the science.

## Activating quotes

Quotes show up as a related list on your Opportunity detail page. It's not activated by default, so if you don't see it on your Opportunity record, don't fret.

To have an administrator enable quotes, follow these steps:

**1. Choose Setup → App Setup → Customize → Quotes → Settings.**

The Quote Settings page appears.

**2. Select the Enable Quotes check box.**

A warning appears informing you that enabling Quotes means that you can't enable Salesforce's Divisions. Most likely, this won't affect you because Divisions is a by-request-only configuration that's for complex organizations.

**3. Click the Save button when you're ready to enable quotes.**

The Page Layout Selection page appears, as shown in Figure 11-6, asking you which page layouts you want displaying the Quotes related list. (To read more about page layouts, see Chapter 21 for more on customizing Salesforce with Force.com.) This is also usually not an issue. Sometimes, you may have a team that doesn't send Quotes, while another one does. This selection can help avoid any confusion between teams.

**4. Select all check boxes for the page layouts that you want displaying the Quotes related list.**

**5. Select the check box if you want the Quotes related list automatically appended to users' lists.**

Because users can rearrange the order and display of their related lists, this just saves them a step by having Quotes show up under Opportunities without their having to lift a finger.



**Figure 11-6:** Select which page layouts should include the Quotes related list in its display.

Add List	Page Layout Name
<input type="checkbox"/>	Opportunity (Marketing) Layout
<input type="checkbox"/>	Opportunity (Sales) Layout
<input type="checkbox"/>	Opportunity (Support) Layout
<input type="checkbox"/>	Opportunity Layout

Append to users' personal related list customization

Save Cancel



6. **Click Save when you're done.**

You're returned to the Quotes screen.

## *Customizing quotes*

After you enable Quotes, notice on the sidebar — under App Setup → Quotes — that a bunch of new links show up. These help you further customize your quote based on the complexity of your needs. To keep this discussion simple, we focus on the basics of creating a simple quote that's still tailored to your organization.

Quotes use many standard fields that are prepopulated with information already existing in the Account and Opportunity records. This makes quote creation that much more streamlined in Salesforce because you don't have to spend time re-typing a customer's address, contact information, or what they ordered (unless you want to). Check out all the standard Quote fields by choosing Setup → App Setup → Customize → Quotes → Fields.

To create a custom field for your quote, follow these steps:

1. **Choose Setup → App Setup → Customize → Quotes → Fields.**

The Quote Fields page appears.

2. **Scroll down to the Quote Custom Fields & Relationship section.**

3. **Click New to create a new field.**

The New Custom Field Wizard begins, consistent with what we've discussed with other objects. (For example, in Chapter 6, we discuss customizing account fields.)

4. **Click Save when done with the wizard.**

You return to the Quote Fields page.

## *Preparing quotes for customers*

For those of you working on the front lines with prospects and customers, creating a new quote is a cinch.

To create a new quote, follow these steps:

1. **Select an Opportunity record that matches the potential deal you want to issue a quote for.**

**2. Scroll down and look for the Quotes related list, shown in Figure 11-7.**

If you don't see it, ask your administrator to enable quotes (by reviewing the earlier section, "Activating quotes").

**3. Click the New Quote button.**

A New Quote detail page appears, in Edit mode.

**Figure 11-7:**  
Create a  
new quote.

Action	Quote Number	Quote Name	Status	Expiration Date	Discount	Grand Total	Created By
Del	0000001	Quote Name - Package Details	Draft	6/30/2018	0.00%	\$10,000.00	L.S. King

**4. Enter the Quote Name, Expiration Date of the quote, its status, and other information requested in the fields.**

**5. Click Save when done.**

The Quote page appears.

## Revising quotes

As you progress in your negotiation cycle, you may need to modify the information in your quote. This can include modifying the information captured in the quote fields, or it can mean actually changing the prices of what you originally offered.

To revise your quote, follow these steps:

- 1. From the opportunity record, scroll down to the Quotes related list section.**
- 2. Locate the quote you wish to revise and click the Edit link to the left of the quote name.**

The Quote Edit page appears for that quote.

- 3. After you make your changes, click Save.**

The Opportunity page reappears.

To modify the actual line items that you quoted, follow these steps:

- 1. Scroll down the page and note the Quote Line Items related list.**

If you choose to offer an item for below-list price, you can edit the information here to record the actual sales price you want to quote.

**2. Click the Edit link to the left of the quote line item description.**

The Quote Line Item edit page appears.

**3. Modify the applicable fields if you're providing a discount.**

This spells out the amount of the discount and where it's being applied.

The Discount field is a percentage (%) discount, and it calculates the equivalent value based on the Subtotal.

**4. Click Save when done.**

The Quote page reappears.



## *Sending quotes*

After you have your quote just right, it's time to send it to the customer. To e-mail (or fax) your quote to your customer, you first need a PDF copy of the quote.

To create a PDF of your quote, follow these steps:

**1. Go to the Opportunity record's Quote related list.****2. Click the quote you wish to send.**

The Quote page appears.

**3. Click the Create PDF button.**

You're shown a preview of your quote.

**4. When you're ready to save the quote, click Save to Quote, or click Save and Email Quote.**

This allows you to save the PDF to the Quote record as an attachment for later use (or faxing), or to save the quote and also e-mail it to the contact that you prepared the quote for.



If you made modifications to the products listed in your Quote, you can sync those with the original Opportunity record associated with the Quote. You can only sync one opportunity to one quote at a time, though. This ensures that the prices on the most recent quote you put out there are accurately reflected in the Opportunity record (or vice versa).



## Chapter 12

# Managing Your Partners

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### *In This Chapter*

- ▶ Understanding the partner lifecycle
  - ▶ Managing partners
  - ▶ Using the Partner Portal
  - ▶ Configuring the Partner Portal
- 

**B**ecause Salesforce can get sales reps and managers on board to track all their opportunities and sales-related activities, the big pipeline picture should be getting clearer for everyone. *Partners*, which might also be known in your business as third-party companies, value-added resellers (VARs), original equipment manufacturers (OEMs), wholesalers, or distributors, can also be accurately managed in Salesforce almost as if they were full-time dedicated company sales reps. It used to be difficult to create and maintain unique messages and branding for specific groups of partners. Not any longer.

Salesforce Partner Relationship Management extends the existing Salesforce product to partners and the leads and deals they bring in. Additionally, support managers and support reps within a company can more easily resolve issues for your partners.

A detailed discussion of Salesforce Partner Relationship Management could take up a whole book on its own, so in this chapter, we provide a high-level overview of what life is like for partners and channel reps. We then discuss how a channel team manages its partners with Salesforce Partners. For partners asked by their vendors to use this application, we discuss how to access and navigate Salesforce from the Partner Portal. Finally, we give channel managers and administrators some pointers on how to set up Salesforce Partner Relationship Management and begin giving partners access.



For more detailed insights, check out the PRM Success Blog at <http://blogs.salesforce.com/prm>.

## *Understanding the Partner Lifecycle*

Using an indirect sales force of partners to help sell your products allows you to quickly and cost-effectively expand your company's reach into markets that you might otherwise not have the resources to tackle. Some industries that are more partner-intensive include high-tech, insurance, and manufacturing. In this section, we set the stage for two types of business users and how Salesforce Partners can help.

Here are some helpful Partner Relationship Management (PRM) terms:

- ✔ **Vendor:** The company that's using Salesforce and for whom the channel managers work.
- ✔ **Channel managers:** The employees within your company that manage a set of partners.
- ✔ **Channel conflict:** What happens when your direct sales force and your indirect sales force find the same prospect to woo and start bickering about who's entitled to that lead. A clear sign that your current PRM system is ineffective.
- ✔ **Deal registration:** Minimizes channel conflict. These programs get your indirect sales channel registering deals with you (the vendor) to reduce the chances of other partners or the direct sales force competing for a deal.
- ✔ **Partner Portals:** Customizable Web portals hosted by salesforce.com that allow partner users to access Salesforce. Your company can set up multiple portals for multiple partners, if you need to use different branding.
- ✔ **Partner accounts:** Account records that are used by channel managers to manage partner organizations, partner users, and partner activities.
- ✔ **Partner users:** Salesforce users with limited capabilities and visibility into your instance of Salesforce. They're associated with a specific partner account and access Salesforce via a Partner Portal.

## *Understanding a day in the life of a channel manager*

Channel managers and their direct reports, channel reps, manage relationships with various types of partners and partners-in-waiting. The channel team does whatever it can to empower its indirect sales force with the right selling tools, sticks and carrots, to make sure that the relationship is win-win.

## Measuring partner performance

A major communication services company drove its channel sales strategy by partnering with leading wireless equipment manufacturers. Sometimes, the company was introduced to the end customer; other times, the company was involved in opportunities completely

managed by the manufacturer. But in all circumstances, the company's channel managers leveraged Salesforce Partners to track the partner sales performance, to improve mindshare with strategic partners, and to deepen its relationships with end customers.

With Salesforce Partners, channel managers now have access to Salesforce dashboards, leads, opportunities, accounts, and document records. Dashboards provide a graphical snapshot of the channel's performance, so you can see how much revenue the channel is bringing in. Leads are potential business that either come from a partner or that come to your company and are automatically or manually reassigned to the best partner for the job. Opportunities are the deals sourced or nurtured by your partners. Accounts can be resellers, distributors, agents — any type of partners that your business tracks. Channel managers can also use documents to publish copies of sales tools, price lists, or product information for partners.

In addition to these standard tabs, you can also track partner budgets and fund claims if you run joint marketing programs, create and promote rebate programs with your partners, and more. Your administrator needs to set this up, so make sure she reads the “Setting Up Salesforce Partners for Your Channel Team” section, later in this chapter.

## *Understanding a day in the life of a partner*

A partner's perspective is the flip side of the relationship managed by the channel manager. For example, one type of partner could be reselling your company's products. That partner works in a territory that's managed by a channel manager.

With Salesforce Partners, partner users can now access a limited view of your Salesforce information via a Partner Portal. The Partner Portal provides a centralized view of leads to pursue; opportunities in your pipeline; vendor documents to help with the sales cycle; and optional tabs to help with additional responsibilities, such as making fund requests. Partners get to see leads specifically assigned to them or grabbed from a general “shark tank” in

which first come is first served. Additionally, partners can receive other key targeted messages on the Web site, update their company's information for the vendor to see, and e-mail their channel rep, as needed. Figure 12-1 shows a sample Partner Portal that you might set up for your partners.



**Figure 12-1:**  
Accessing  
the Partner  
Portal.

## *Managing Your Channel with Salesforce Partners*

After your administrator has set up your organization with Salesforce Partners, the channel team can easily access it from the AppExchange app menu in the upper-right of your Salesforce window. This section provides a high-level overview of how the channel team can now use Salesforce Partners to gain better visibility into their partner relationships. We also recommend you scan Chapters 4 and 9, which talk in more detail about navigating accounts and leads.

### *Creating partner accounts and contacts*

First, you should make sure that all your partners are represented as accounts in Salesforce, with the respective channel managers owning the partner account records. This then allows channel managers to monitor and record all activities related to partners in their territory.



To create a new partner account, follow these steps:

1. **Use the Create New drop-down list on the sidebar and select the account option.**

See Chapter 4 for more information on managing accounts.

2. **Creating the account record, click the Work with Portal button on the account record, and select Enable as Partner.**

If you don't see this button, you don't have the permissions to manage partners, or you don't have Partner Relationship Management enabled for your organization — check with your Salesforce administrator.

3. **Associate partner users to this partner account record by adding contacts.**

See Chapter 5 for details on creating new contacts.

4. **Create a new contact, click the Work with Portal button on the contact record, and select Enable Partner Portal Login for your partner user to receive his or her login and password notification via e-mail.**



## *Assigning leads to partners*

By assigning leads to partners, channel managers ensure an organized way of seeing what potential business their partners are working on.

Leads may be assigned to partners by manually switching the record ownership, by assigning partner leads to a queue (also known lovingly as the “shark tank”), or by adopting a “round robin” method, in which leads are routed evenly to a number of queues. Partners then have access to the queue to grab leads. (You can keep them from getting too greedy by setting a ceiling on how many leads they can accept to work at one time.) Additionally, lead assignment rules may be set up by your administrator to automatically assign leads to partner users or partner queues based on certain rules.

To reassign a lead to a partner user, follow these steps:

1. **On the lead record, next to the Lead Owner field, click the Change link.**

The link is in square brackets. The Change Lead Owner page appears.

2. **From the Owner drop-down list, choose the Partner user option.**
3. **Select the partner user to whom you're assigning the lead.**
4. **(Optional) Select the Send Notification Email check box to notify the partner about the lead.**

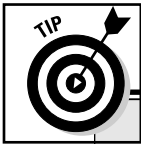
#### 5. Click Save.

The lead record reappears with your ownership change. The new partner owner instantly receives a customizable e-mail if you selected the Send Notification check box, and the lead appears in their Lead Inbox the next time they access the Partner Portal.

You may also reassign leads in bulk. See Chapter 9 for more information.

## *Reducing channel conflict with deal registration*

Without a well-thought-out PRM process, companies often run into channel conflict when their direct sales and indirect sales forces butt heads over who found which lead first. As the channel manager, you often have to waste time arguing with a direct sales rep and her manager over who has dibs, while the prospect waits for the internal bickering to stop. This isn't an efficient way to close a deal, and it's frustrating for the customer to often hear multiple messages (or even price quotes!) from what's supposed to be a united front. In addition, if the partner loses out on that opportunity, you've just lost some of their trust in how supportive you really are in their efforts — so why should they reveal their pipeline data early or adopt your processes?



### **Salesforce to Salesforce**

Salesforce to Salesforce is an amazing complementary feature to Salesforce Partners that allows partners with their own instance of Salesforce to seamlessly share lead and opportunity records with vendors, in real-time. Traditionally, this sharing occurred through a hairy, expensive, and drawn-out integration process. If a lot of your partners also use Salesforce, think about what partner processes you want to track.

- ✓ If you have very specific custom processes that are more focused on a high volume of lead and opportunity management, you may lean toward using Salesforce to Salesforce.

- ✓ At the same time, if you send a lot of customized partner communications, including collateral and content distribution, and you deal with both a Salesforce-owning and non-Salesforce-owning indirect sales force, you may want to lean more toward the Partner Portal.

We don't have one correct answer to give you, so make sure you run things by your Customer Success Manager. Salesforce.com charges extra for an organization that invites others to share information, but the invited organization can accept that invitation for free.

By taking the time to design a deal registration process, concisely and consistently communicate the status of deal registrations to partners, efficiently carry out the approval for all submissions, and then be able to measure related conversion and close ratios, you can eliminate channel conflict. The deal registration capabilities of Salesforce Partners help provide clarity on what your deal registration processes are from start to finish, which can increase adoption of your partner program and help increase partner sales because the channel conflict inefficiencies disappear. However, this setup can be successful only if you invest the time to think out your deal registration process. If you have a hard time explaining it or whiteboarding it, how do you think your partners feel?

Here are some key questions to ask before establishing any deal registration program:

- ✔ How would you describe your deal registration process, from start to finish?
- ✔ What do partners get for registered deals? Exclusivity? A rebate? A different tier or status?
- ✔ What do you think would increase deal registrations?
- ✔ What information do you need when a deal is registered? Balance your quest for knowledge with the partner's patience in filling out fields.
- ✔ What's your process for approving deal registrations?
- ✔ What criteria do you evaluate to determine who officially owns a deal?
- ✔ Does this approval process work the same for all partners? For which categories would it be different?
- ✔ What metrics matter to you?

## *Understanding Your Partner Portal Home Page*

You can strengthen your vendor relationship by accessing your vendor's instance of Salesforce from a Web portal and getting first-hand access to leads, accounts, opportunities, and other tabs to manage your deals. You can get leads assigned to you in real-time — no waiting forever after a trade show ends to see which leads to pursue. You can also provide your channel managers with real-time updates on the status of deals that you're trying to bring

in. That way, if you need some assistance, your channel manager can view all deal-related activity that occurred up to a certain point and provide you with the appropriate resources to close the deal. In the following sections, we give you a quick overview on accessing and navigating your Partner Portal.

As a partner sales rep, you'll receive two e-mails from your vendor's Salesforce administrator after they're ready for you to start accessing the Partner Portal. The first e-mail welcomes you to the Salesforce service. The second e-mail contains your Salesforce login, temporary password, and Partner Portal URL.

In this e-mail, click the appropriate link to log in directly to your Partner Portal and change your temporary password. Make sure you remember to bookmark the portal's URL for easy access later. After logging in and changing your password, you're brought to the home page for your Partner Portal. Every time you log in to the Partner Portal, you begin at your home page. You'll see that the Partner Portal is organized into a series of tabs, similar to the navigation of Amazon.com. Refer to Figure 12-1. The look of your portal may resemble your vendor's branding, or your own.

## *Verifying your account information*

On the left side of the home page is the sidebar. Near the top of the sidebar, you see your name as registered within Salesforce. Make sure your company's information is up to date by following these steps:

- 1. Click the My Company Profile link below your name, as shown in Figure 12-2.**

Information about your company appears. This reflects the information your vendor has about you, so you should make sure it's accurate.

- 2. Click the Edit button and make any updates, as needed.**
- 3. When finished, click Save.**

Your account profile page reappears.

**Figure 12-2:**  
Viewing  
your  
account  
profile.



## *Contacting your channel manager*

Below your user name is the name of your main contact for your vendor. Usually, this is labeled Channel Manager, but your vendor can set it to the most appropriate title. If at any time you can't remember your channel manager's name, head to the home page. If you need to contact your channel manager at any time, just click the manager's name and his e-mail address appears in a new message in your e-mail application.

## *Creating new records*

Below your channel manager's name, you see a set of links to easily create new records under the aptly named Create New section. The types of new records you can create depend on what your vendor wants you to track. Here are a few examples of links you may see:

- ✓ **Deal Registration:** Allows you to submit information on a potential lead that looks like it'll bear fruit. After creating this type of new record, your deal registration is submitted for review and approval by your channel manager.
- ✓ **Sales Lead:** Tracks the submission of prospects that you have for your vendor. Actively referring leads shows your channel manager that you're pounding the pavement.
- ✓ **Fund Request:** Associates a request for funding to a justifiable marketing activity. Your channel manager reviews this and provides the appropriate funding for a booth at a tradeshow that may help bring in revenue for both of you, for example.
- ✓ **Claim:** Get reimbursed after the marketing activity.

## *Browsing the Lead Inbox*

In the main body of the page, below the company message, is the Lead Inbox, which contains unviewed leads that have been assigned to a general partner lead pool. The lead pool allows channel managers to fairly make leads available to their partners while also avoiding multiple partners working on the same lead: After you claim a lead from the lead pool, no other partner may claim it.



Take note to play nicely. Your vendor can set a maximum number of leads that each partner user may claim so that a partner with an itchy trigger finger doesn't make away with all the goodies. Don't worry, though. If you can close the lead or reassign it to someone else, you can claim leads again until you hit your maximum.

The leads in your inbox are listed according to columns set by your vendor. Click any column heading to re-sort your inbox list according to that column's criteria. Click the same column header a second time to re-sort your inbox list in reverse order.

If you see a record in your inbox, that's a lead in a pool that you should claim if you think you're the right partner to pursue it. You'll see that the Action column displays Accept for these types of leads.

To claim a lead from a lead pool, follow these steps:

**1. Click the Accept link for that record.**

A link to the Lead now appears in the Recent Items section in the sidebar. You can click it to review more information about your lead and update the lead status to begin pursuing this suspect.

You can't first look at the details of a lead record and then accept it. That'd be similar to biting a piece of chocolate from the candy box and putting it back if you didn't like the coconut filling — not very nice, is it?



**2. Click Edit to update the lead.**

After all, you want to be able to work on all the leads that you claimed so your channel manager sees some results.

**3. Click Save after you update the record.**

The Lead page reappears.



The Lead Inbox displays only new leads that haven't been opened. After you've viewed a lead, even if you didn't make any changes, the record won't show up in your inbox. You can access it instead from the Leads tab.

## *Setting Up Salesforce Partners for Your Channel Team*

Before setting up Salesforce Partners, your Salesforce administrator should meet with a member of the channel sales team to confirm your PRM needs. Discuss the following questions:

- ✓ What percentage of your sales force is indirect versus direct?
- ✓ What types of partners do you work with?
- ✓ Do you message differently to each type of partner?

- ✔ What are the objectives, challenges, and participation benefits for each type of partner in your program?
- ✔ How are your channel territories broken out?
- ✔ How are channel managers tracking partners' sales and marketing activities today?
- ✔ How do channel managers put together their channel forecasts? How long does it take, and how accurate is the information?

Armed with this information, make sure you set an appointment with your salesforce.com Customer Success Manager for some free advice or a blessing to go forward with using Salesforce Partners. Chances are that if answers to these questions show that your business relies heavily on an indirect sales force, yet your visibility into the channel pipeline is as clear as mud, you probably need Salesforce Partners. Again, the information we give you is meant to prepare you to successfully implement Salesforce Partners. The details of all the cool features you can activate are more thoroughly discussed on salesforce.com's PRM Success Blog.

## *Granting partners access to Salesforce Partners*

Granting partners access to the Partner Portal is a four-step process after your company is using Salesforce Partners. You must do the following:

1. Create a profile for partner users (which is needed to enforce licensing).
2. Enable Salesforce Partners.
3. Create a partner user.
4. Associate that partner user with a contact under a partner account.

For more detailed instructions on implementing and customizing the Partner Portal, look for the latest Implementing PRM Portal whitepaper on the PRM Success Blog.





# Part IV

# Optimizing Marketing with Sales Cloud

The 5th Wave

By Rich Tennant



"Well, here's what happened—I forgot to put it on my 'To Do' list."

## *Y*ou can expect to ask the most out of your sales teams only if you're capable of providing all the raw materials necessary to make them successful. They need effective marketing to help generate leads so they don't have to do it all on their own. Sales reps also need to know the products and services that are available, the way to position those offerings, and they must have the documentation that customers require to make buying decisions.

As you can imagine, these raw materials rely not only on sales managers, but on other people in your company: marketing, product management, finance, and so on. With Salesforce, those people can manage their sales-related activities, coordinate with sales teams, and instantly provide the raw materials in one convenient interface. And because users can access Salesforce anywhere at anytime, you don't have to worry about getting calls from reps sitting in airports in the middle of the night.

This part is devoted to the unsung heroes of marketing (although salespeople will find these chapters useful, too). First, we cover the exciting world of marketing campaigns and how you can use Salesforce to manage and measure campaigns and demonstrate your contribution to the bottom line. Next, we provide an overview of Internet marketing and how the responsibilities of your search engine marketing manager can now be tracked with Salesforce for Google AdWords. We then review where you can store your sales collateral in the Document library, as well as Salesforce Content, for organizations that need to take document management to the next level.

## Chapter 13

# Driving Demand with Campaigns

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### *In This Chapter*

- ▶ Creating campaigns
  - ▶ Creating a target list
  - ▶ Executing a campaign
  - ▶ Assessing campaign effectiveness
- 

Companies want to increase revenue by spending marketing dollars intelligently. However, because of the disconnect between sales and marketing teams, managers have a harder time executing campaigns, let alone tracking and measuring the results of their marketing programs. If this sounds familiar to you, campaigns in Salesforce can help you manage and track your marketing programs more effectively, resulting in lower acquisition costs, better leads, and potentially greater sales.

A *campaign* is any marketing project that you want to plan, manage, and track in Salesforce. Depending on your current or planned strategies, types of campaigns include tradeshow, search engine marketing, direct marketing (including e-mail), online promotions, seminars, Web events, and print advertising although this is by no means a complete list.

In this chapter, you find out how to create and manage campaigns, segment target lists, execute campaigns, track responses, and analyze campaign effectiveness.



To administer campaigns, you must be a system administrator or a user with permission to manage campaigns (that is, a marketing manager type). See Chapter 20 for details on configuring your user information and profile to manage campaigns.

## Understanding Campaigns

Available for Professional, Enterprise, and Unlimited Edition users, the *Campaign module* in Salesforce is a set of tools that you use to manage, track, and measure your outbound marketing programs. Its foundation is the campaign record, which can be manually or automatically linked to lead, contact, and/or opportunity records to provide real metrics on campaign effectiveness.

A campaign record comes standard with a set of fields that help you manage and track your campaigns. The following list describes the fields you use most often to measure campaign effectiveness:

- ✔ **Campaign Name:** This is the name of your marketing project. Choose a name that's readily obvious to sales reps and other users whose leads or contacts might be included in the campaign. For example, if you send monthly e-mail newsletters, you might distinguish each campaign by month, as in "Newsletter — May 11" and "Newsletter — June 11."
- ✔ **Type:** This drop-down list includes the types of campaigns you run within your marketing mix (Direct Mail, Email, and so on).
- ✔ **Status:** This drop-down list defines the statuses of a campaign. Salesforce provides a simple default drop-down list of statuses to measure a campaign's progress. By using this field, you and others can make sure that the campaign is on track.
- ✔ **Start Date:** This date field tracks when a campaign begins.
- ✔ **End Date:** This date field tracks when a campaign ends.
- ✔ **Expected Revenue:** This currency field estimates how much revenue the campaign will generate.
- ✔ **Budgeted Cost:** This is the amount that you have budgeted for the marketing project.
- ✔ **Actual Cost:** This is the amount that the project actually cost.
- ✔ **Expected Response:** This percentage field is your best guess of the response rate on a campaign. For example, if your direct mail campaigns typically receive a 2 percent response rate, you might use this value to benchmark the effectiveness of the campaign.
- ✔ **Num Sent:** This is the amount of people targeted in the campaign. For example, if you executed an e-mail campaign to 10,000 e-mail addresses, that would be your Num Sent.

- ✔ **Active:** This check box marks whether a campaign is active. If you don't select it, the particular campaign doesn't appear in reports, or on related lists and other campaign drop-down lists on lead, contact, and opportunity records.
- ✔ **Description:** This field allows you to describe the campaign so that other users who want more detailed information on the campaign can get a solid snapshot.



Depending on your marketing processes, terminology, and goals, you or your system administrator should modify the drop-down list values and change the fields on the record. (See Chapter 21 for details on customizing Salesforce.)

If you're a marketing manager, you can plan and manage the majority of your campaign preparation inside Salesforce. You can

- ✔ Lay out your entire marketing plan of projects.
- ✔ Build the basic framework and business case for a project.
- ✔ Define statuses and success metrics for campaign responses. *Success metrics* measure how you determine whether the campaign was worth your company's time, money, and effort.
- ✔ Develop a detailed project plan so that important tasks get accomplished.

In the following sections, we show you where and how to accomplish these tasks.

## *Creating a new campaign*

To create a campaign, log in to Salesforce and follow these steps:

- 1. Select the Campaign option from the Create New drop-down list on the taskbar.**

A New Campaign page appears, as shown in Figure 13-1.

- 2. Fill in the fields as much as possible or as required.**

If you manage marketing programs for your company, you should see few surprises in the campaign fields. See the preceding section for a summary of the standard entry fields.

- 3. When you're done, click Save.**

Optionally, you can click Save & New if you have more than one campaign to create and want to immediately start on the next one.

**Figure 13-1:**  
Fill in the  
campaign  
record.

After you save your final campaign, the campaign page reappears with the information you entered as well as additional system-generated fields that automatically update as your company makes progress on a campaign.



You can associate campaigns to a parent campaign and see the aggregate performance statistics in one place. For example, your iPad Launch Event could be a parent campaign to other campaigns such as Email Drop, Banner Ad, and Webinar. To group campaigns into a campaign hierarchy, have your Salesforce administrator add the Parent Campaign field to your Campaign page layout. You can then use that field to associate child campaigns with a parent. See Chapter 21 for more information on page layouts.

## Modifying the member status

A *campaign member* is a lead or a contact who's part of a specific campaign. Depending on the type of campaign you're running, you can modify the campaign to have a unique set of member statuses. For example, the member statuses that you track for an e-mail campaign (Sent, Responded) are typically different from those of a tradeshow that you're sponsoring.

To customize member statuses for a specific campaign, follow these steps:

**1. Go to the campaign record and click the Advanced Setup button.**

The Campaign Member Status page for your campaign appears. When you first begin to create campaigns, Salesforce creates a default set of member status values of Sent and Responded.

**2. On the Member Status Values related list, click the Edit button.**

The Campaign Member Status page appears in Edit mode, as shown in Figure 13-2.

**3. Modify statuses by entering a new value in the Member Status column.**

For example, if you're sponsoring a booth at a conference, the preregistrants list is part of the package, and you want to invite attendees to visit your booth, you might add member statuses of Registered, Invited, Attended, Visited Booth, and Met at Show.

**4. Select the check box in the Responded column to classify a status as responded.**

This field tracks the Expected Response Rate field against the actual response rate.

**5. Use the Default column to select a default value.**

**6. Click Save.**

The Campaign Member Status page reappears with your changes.

**Figure 13-2:**  
Editing the  
Campaign  
Member  
Status.

The screenshot shows the 'Campaign Member Status' page for 'Widget Email Drop'. It includes instructions on how to set up member statuses and a table with columns for 'Current Campaign', 'Widget Email Drop', 'Status', and 'Planned'. Below the table is a form to edit member statuses, with columns for 'Member Status', 'Responded?', and 'Default?'. The 'Responded?' column has a checked checkbox for 'Responded'.

Current Campaign	Widget Email Drop	Status	Planned
Type	Email	Active	✓

Member Status	Responded?	Default?
test	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Responded	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Buttons: Save, Cancel

## Building Target Lists

One of the biggest challenges that marketing managers face is developing the right target lists for a campaign. *Target lists* are the lists of people you're targeting in your campaign. Depending on the type of campaign that you're

planning, your lists might come from different sources, such as rented or purchased lists from third-party providers or existing lists of leads and contacts already entered in Salesforce. If your target list is composed of the latter, you can create your target list directly from the Salesforce Reports tab and associate specific campaigns to those leads and contacts, or you may add leads and contacts directly to specific campaigns.

## *Using rented lists*

With a rented list, your options are limited. Depending on the circumstances, sometimes you don't know who's on the list because the list is controlled by the vendor. Other times, you agree to limited use terms, such as one-time usage. In these circumstances, simply use the external list as the target list instead of importing the list into Salesforce.



You can use Salesforce to improve the quality of rented lists. Many third-party vendors look for duplicate names, confirm that they all point to the same person, and then help you merge them into one file. They do this by comparing their database against your customer database when they're generating the record count for a rented list. As long as you can trust the vendor, you can quickly use Salesforce to generate a file of your existing contacts to compare. By getting rid of duplicates first, you can stretch your marketing dollars by making sure that you're not paying for contacts you already have. And if you're doing a mixed campaign of rented and owned lists, you stand a better chance of not upsetting a customer with duplicate mail.

## *Importing new campaign members*

If you own or purchase a list and intend for your teams to follow up on all the records, you can import the list into Salesforce as lead records and automatically link the records to a campaign. Here, we show you how to select a list on your computer to import, mass-associate various characteristics to the list (such as the lead source or campaign), perform the import, and verify that your settings came through.

To import a list and attribute it to a campaign, follow these steps:

- 1. On the campaign record, click the Advanced Setup button, verify that the member statuses are accurate, and then return to the campaign record by clicking the Back button on your browser.**
- 2. Click the Manage Members button.**

A drop-down list appears.

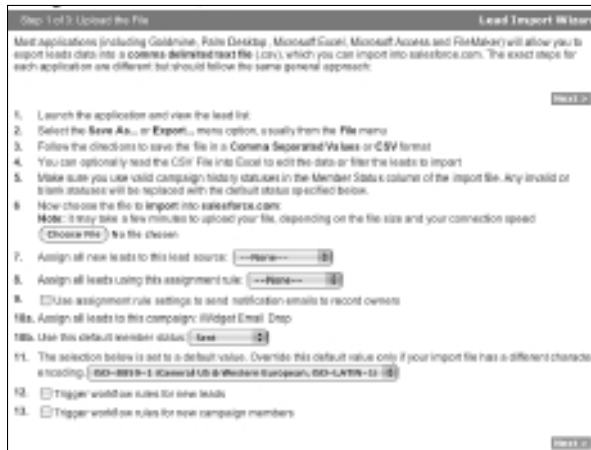


### 3. Choose the Add Members – Import File option.

The Campaign Member Import Wizard starts.

### 4. Click the Import Leads button.

Step 1 of the Lead Import Wizard appears, as shown in Figure 13-3. Here, you associate various field statuses to the list of leads that you want to import.



**Figure 13-3:**  
The Lead  
Import  
Wizard.

### 5. Prepare your file, following the instructions that the wizard gives you.

Here are the main steps to perform:

*a. Add and fill in a column for Member Status unless all records will use the default member status.*

or

*Add and fill in a column for Lead Owner unless you'll be the owner or you're applying lead assignment rules.*

*b. Save the file in a .csv format on your computer.*

### 6. In the wizard, click the Browse button to select the file from your computer.

A Choose File dialog box appears.

### 7. Locate your file and click Open.

The dialog box closes, and the filename appears in the field.

### 8. Use the drop-down list to select a lead source.

9. (Optional) Use the next drop-down list to select an assignment rule.
10. (Optional) Select the Use Assignment Rule Settings to Send Notification Emails to Record Owners check box.
11. Verify the campaign to which your leads will be assigned.
12. Verify the default member status.
13. Leave the character encoding unchanged unless necessary.

If you're using this within the United States, you most likely won't be changing this. To be sure, check with your system administrator.

14. (Optional) Select the Trigger Workflow Rules for New Leads check box if you want workflow rules to work on new or updated records.
15. When you're done, click Next.

Step 2 of the wizard appears, where you confirm the mapping of the Salesforce field to the correct column in your uploaded file. See Figure 13-4 for details.

16. Map the fields by comparing the Salesforce Field columns against the corresponding drop-down lists in the Import Field columns.

Step 2 of 3: Map the fields

In the list below, select the field in your import file that should be imported into each Salesforce.com field. Once you have finished, click Next.

Record Owner:   | Salesforce.com Field | Import Field | Salesforce.com Field | Import Field |
| --- | --- | --- | --- |
| Full Name |  | Campaign |  |
| First Name |  | Rating |  |
| Last Name |  | Website |  |
| Salutation |  | Annual Revenue |  |
| Title |  | Industry |  |
| Email |  | No. of Employees |  |
| Status |  | Email Opt Out |  |
| Description |  | Do Not Call |  |
| Fax Opt Out |  |  |  |

#### Address Information

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Address Line 1	<input type="text" value="none selected"/>	Phone	<input type="text" value="none selected"/>
Line 2	<input type="text" value="none selected"/>	Fax	<input type="text" value="none selected"/>
Line 3	<input type="text" value="none selected"/>	Mobile Phone	<input type="text" value="none selected"/>
City	<input type="text" value="none selected"/>		
State/Province	<input type="text" value="none selected"/>		
Postal Code	<input type="text" value="none selected"/>		
Country	<input type="text" value="none selected"/>		

#### Lead Custom Fields

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
SIC Code	<input type="text" value="none selected"/>	Product Interest	<input type="text" value="none selected"/>
Primary	<input type="text" value="none selected"/>	Current Generation	<input type="text" value="none selected"/>
Number of Locations	<input type="text" value="none selected"/>	CorrelationID	<input type="text" value="none selected"/>
Correlation Date	<input type="text" value="none selected"/>	Web Source	<input type="text" value="none selected"/>

**Figure 13-4:**  
Mapping  
fields with  
the Lead  
Import  
Wizard.

**17. When you're done, click Next.**

Step 3 of the wizard appears.

**18. Review and confirm the import, and when you're done, click the Import Now button.**

Your new campaign members will appear under your campaign record, which you can access from the Campaign tab.

## *Targeting existing members with the Integrated Campaign Builder*

Assuming that your company has already imported users' leads and contacts, you can build your target lists directly in Salesforce three ways:

- ✓ Associating existing leads and contacts en masse to a campaign
- ✓ Adding members from custom reports
- ✓ Adding members from a List View

After you link your desired leads or contacts with a specific campaign, you can begin to target them.

### *Adding members from a campaign record*

To associate existing leads or contacts to a campaign you're planning, start by making sure you can see the leads or contacts via a List View. See Chapter 5 (contacts) or Chapter 9 (leads) for information on using List View. You can add as many as 200 leads or contacts per List View page. Then, follow these steps:

**1. From the specific campaign record, click the Manage Members button.**

A picklist appears.

**2. Select the Add Members – Search option.**

In this example, we add existing leads. The Manage Members Wizard appears.

**3. In the Manage Members Wizard, do the following:**

- a. From the Add Members subtab, in the Choose Member Type to Search section, confirm that the Leads radio button is selected.

This is the default.

- b. Specify the Filter Criteria.



You may use an existing lead view or create new criteria now to get the leads you want for this campaign.

If you're not yet sure what subset of leads to use, step back and give this some thought. E-mailing all the leads in your database might not be a wise decision.

**4. Click Go after you select your criteria.**

The search results appear below the filter criteria.

**5. Select the check box next to the appropriate leads that you want added to this campaign, as shown in Figure 13-5.**

The screenshot shows the 'Add Members' interface in Salesforce. At the top, there are tabs for 'Add Members' and 'Existing Members (0)'. Below is a search bar and two steps: 'Step 1: Choose Member Type to Search' (with 'Leads' selected) and 'Step 2: Specify Filter Criteria'. A table for filter criteria is shown with columns for Field, Operator, Value, and a logical connector (AND). Below the filter criteria is a 'Go!' button. The main part of the interface is a table of leads with columns for 'Add with Status', 'Last Name', 'Title', 'Company', 'Email', and 'Campaign Member S...'. The 'Add with Status' column has a dropdown menu open, showing options like 'Responded', 'None', 'Doubt', 'Add', 'Dis', 'Gill', and 'Domic'. The table contains several lead entries with their respective details.

Add with Status	Last Name	Title	Company	Email	Campaign Member S...
Responded	Jackson		Int. org. (red)	amy@int. org	
	Young	SVP, Operations	Clackson plc	a_young@clackson...	
<input type="checkbox"/>	Grant		Int. org. (red)	agrant@int. org	
<input type="checkbox"/>	Doe	Director of Vendor R...	Carmera Corp. of Fla...	bertha@doe.net	
<input type="checkbox"/>	Earl	VP, Administration	American Banking C...	steve@americanba...	
<input type="checkbox"/>	Decker Jr.	CPD	Smith Industrial Part...	bill_decker@smith.com	
<input type="checkbox"/>	George		Int. org. (red)	bill@george.com	
<input type="checkbox"/>	Rutherford		Int. org. (red)	terrie@rutherford.com	

**Figure 13-5:**  
View leads  
to associate  
with a cam-  
paign.

**6. Click the Add with Status drop-down list to immediately select and associate the member status with those selected leads.**

Your selected leads now appear on the Existing Members subtab.

Don't worry. If your itchy trigger finger got you to add some members before you were ready, you can use the handy Remove button to disassociate the members from this campaign and start over again.



**7. Repeat Steps 2–5, selecting new views, as needed.**

**8. Click the Back to Campaign: [Campaign Name] link below the Manage Members page name, when finished.**

The campaign record reappears.

### *Adding members from a custom report*

As many as 50,000 leads or contacts in a single lead, contact, or campaign report may be associated to a campaign. To add existing members by running a report, follow these steps:

1. **From the Reports home page, click a custom report of the leads or contacts that you'll be targeting. (See Chapter 18 for more information on creating custom reports.)**

A Reports page appears, as shown in Figure 13-6.

2. **Click the Add to Campaign button.**

The Add Members Wizard appears.



The screenshot shows a web application interface with a navigation bar at the top containing buttons: Run Report, Hide Details, Customize, Customize Using Report Builder, Save, Save As, Delete, Printable View, Export Details, and Add to Campaign. Below the navigation bar is a table with columns: Lead Owner, First Name, Last Name, Title, Company / Account, Rating, Street, and Add to Campaign. The table contains several rows of lead data.

Lead Owner	First Name	Last Name	Title	Company / Account	Rating	Street	Add to Campaign
Lead Source: Firms (7 records)							
Lead	Bill	Smith Jr	CEO	Smith Industries Partners	-	-	bill_schoc@smith.com
Lead	Jack	Spencer	VP, Facilities	Burlington Trucking Corp of America	Warm	521 S. Lexington Ave	spencer@bta.com
Lead	Mark	Shi	VP, Facilities	Sehestedt Metals	-	-	mark_shi@sehestedt.net
Lead	Tom	James	SVP, Production	Delphi Chemicals	-	-	tom.james@delphi.chemicals.com
Lead	Renzo	Milano	CEO	CECOIL INC.	-	-	renzo@cecoil.com
Lead	Phyllis	Collier	CFO	Adelphi Insurance	-	-	phyllis@adelphi.net
Lead	Becky	Beck	Director of Vendor Relations	Palmer, Corp. of Florida	Hot	321 Vendors Building	beck@palco.net

**Figure 13-6:**  
Add report members to a campaign.

3. **Select an existing campaign for the Campaign field. Use the Lookup icon to search for your match.**
4. **After a campaign is selected, choose the appropriate status from the Member Status drop-down list.**
5. **Use the radio buttons to toggle whether you want the existing member statuses to be overridden by this member status.**

The default is to not override existing member statuses.

6. **Click Add to Campaign to continue.**

Step 2 of the wizard appears with a status message of your attempt.

7. **Click Done when information has been verified.**

You're returned to your custom report page.

### *Adding members from a view*

If you've followed our example to this point, from any lead or contact view page, you can add members to campaigns. Note that the capability to add members to campaigns from any lead or contact view page allows only marketing managers to select and add members one page at a time, so it's best for adding a small amount of members. If your view is more than one page,

you have to advance to that page and then add members. To add a member from a List View, make sure the view (to see how to make custom List Views, read Chapter 9 or 10) has already been created and follow these steps:

1. **At the view's results page, select the check box next to the appropriate member names that you wish to add to your campaign.**

In Figure 13-7, we add some contacts to a campaign.

**Figure 13-7:**  
Add list members to a campaign.

Action	Name	Account Name	Title	Phone	Email	Contact Owner Alias
<input checked="" type="checkbox"/>	Earl   Del	David J. J...	Director, V...	(505) 411-7800	ldavis@usps...	USac
<input checked="" type="checkbox"/>	Earl   Del	James S...	VP, Finance	+66 181 486200	sales@usa.com	USac
<input checked="" type="checkbox"/>	Earl   Del	Divyansh S...	SVP, Production	(212) 842-9800	sonic@usa.com	USac

2. **Click the Add to Campaign button after your members have been selected.**
3. **Select an existing campaign for the Campaign field. Use the Lookup icon to search for your match.**
4. **After a campaign is selected, choose the appropriate status from the Member Status drop-down list.**
5. **Click Add to Campaign to continue.**

Step 2 of the wizard appears with a status message of your attempt.

6. **Click Done when information has been verified.**

You return to your view page.

## Executing Campaigns

Depending on the type of campaigns you're running, you might execute those campaigns online, offline, or in combination. And, based on the complexity of the campaign and your resources, you can use Salesforce to assist the execution of parts of your campaign.

### Delivering an online campaign

If you send e-mail campaigns as part of your marketing strategy, you can use Salesforce for elements of the execution. Those elements might include

- ✔ **Exporting an e-mail list** from Salesforce for delivery to your e-mail execution vendor or internal resource
- ✔ **Building an automated Web form** to capture leads as part of your e-mail or Webinar campaign  
See the later section “Using Web-to-Lead forms.”
- ✔ **Using standard e-mail templates with merge fields** so you can control the look and feel of your messaging

You can use Salesforce to deliver and track mass e-mails, but Salesforce wasn’t designed or intended to be used for large-scale, mass e-mail marketing. Some Salesforce customers use the mass e-mail tool for small campaigns. Depending on which edition of Salesforce you have, you can send 100 (Professional), 500 (Enterprise), or 1,000 (Unlimited) e-mails per mass mailing. Your company is always limited to 1,000 e-mails per day through this feature.



Several e-mail vendors have integrated their campaign execution tools with Salesforce. With this integration, marketing managers can more seamlessly deliver e-mail campaigns from Salesforce. The costs and functionality vary across the e-mail marketing vendors, so check out the options on the Force.com AppExchange directory at [www.appexchange.com](http://www.appexchange.com). Search using the keyword *email*.

## *Executing an offline campaign*

If you execute offline campaigns, you can also use Salesforce in a variety of ways to simplify the process. How you use Salesforce depends on the type of campaign, but here are some suggestions:

- ✔ **If you’re sponsoring a conference:** Set up a Web registration form for your booth computers to capture information on attendees who visit your booth.
- ✔ **If you’re sending out direct mail pieces:** Use Salesforce to generate lists for your fulfillment vendor.

## *Tracking Responses*

After you launch a campaign, you can use Salesforce to track responses. In Salesforce, you have three basic types of tracking mechanisms, which we describe in the following sections.



To track responses on a campaign, you need to be able to view the Campaign related list on lead and contact records. If you can't view this list, see Chapter 21 on customizing page layouts or see your system administrator for help.

## *Using Web-to-Lead forms*

Whenever we help clients with using Salesforce, we take a look at their Contact Us Web page. If it's filled with a bunch of e-mail addresses (like `info@mycompany.com`), we immediately recommend they get Web-to-Lead up and running. After all, a company with a Web site using Salesforce in this day and age should take advantage of capturing information via an online form.

*Web-to-Lead* is a Salesforce feature that enables your company to easily capture leads from your Web sites and automatically generate new leads in Salesforce. With Web-to-Lead, you can collect information from your Web sites and generate as many as 500 new leads daily. Say you already have a registration or a lead form on your public Web site. With Salesforce, you can — in minutes — generate HTML code that your Webmaster can apply to your existing form. Then, when people fill out the form on your Web site, the information is routed instantaneously to users in Salesforce. By using Web-to-Lead, your reps can follow up on leads in a timely manner.

Specifically for campaign tracking, you can also create forms for Web pages designed for a unique campaign to capture information on a campaign member who responds.

Before you can capture leads from an external Web page, though, you need to enable Web-to-Lead, add any additional custom fields to your lead record, generate the HTML code, and add the code into a Web page. Of course, involve your Web team to test and review this before it goes live.

### *Enabling Web-to-Lead*

All Salesforce customers can capture leads from Web forms. First, check whether you need to turn it on for your company.

Log in to Salesforce and follow these steps:

#### **1. Choose Setup⇨Customize⇨Leads⇨Web-to-Lead.**

The Web-to-Lead Setup page appears. Under Web-to-Lead Settings, make sure that Web-to-Lead is enabled. You can tell by looking for the Web-to-Lead Enabled check box. If it's marked, you're good to go. If not, go to the next step.



**2. If Web-to-Lead isn't enabled, click the Edit button.**

The Web-to-Lead Settings edit page appears.

**3. Fill out the fields in the page.**

Salesforce provides three fields:

- *Web-to-Lead Enabled:* Select this check box.
- *Default Lead Creator:* Use the Lookup icon to select the default creator for when a lead is generated from a Web form. You usually select the user who manages marketing campaigns for your organization.
- *Default Response Template:* Select a default e-mail response template. You don't need to have one, but it's a good practice to reply to leads so they know you got their request.

**4. When you're done, click Save.**

The Web-to-Lead Setup page reappears.

***Generating HTML***

You can use a tool in Salesforce that takes the guesswork out of generating HTML code for your Web forms.

To generate a general or a campaign-specific Web-to-Lead form, log in to Salesforce and follow these steps. If you just finished the steps in the preceding section, click the Create Web-to-Lead Form button in the Web-to-Lead Setup page, and you'll arrive here.

**1. Choose Setup⇨Customize⇨Leads⇨Web-to-Lead.**

A Web-to-Lead Setup page appears.

**2. Click the Create Web-to-Lead Form button in the Web-to-Lead Settings section.**

The Web-to-Lead Setup page appears.

**3. In the Create a Web-to-Lead Form section, customize which fields you want to include on your Web-to-Lead form.**

Click a field name in the Available Fields column and then click the Add arrow button to add that field from the Available Fields column to the Selected Fields column. Conversely, remove fields from the Selected Fields column by similarly clicking a field name in the Selected Fields column and then clicking the Remove arrow.

Balance selecting enough fields so they help you route the lead to the right person with the patience level of the prospect filling out the form.



- 4. In the URL field, enter a return URL (if known) and then click the Generate button at the bottom of the page.**

The return URL corresponds to the landing page that appears after the lead has submitted his information online. If you don't know whether you have one, or which one to use, check with your marketing manager and your Web manager. When you click the Generate button, a page appears with HTML code inserted in a box.



If you're creating a Web form specific to a campaign, create the campaign first, and make sure that you selected the Active check box for that campaign record. By doing this, you can select the fields for Campaign and Campaign Member Status, which enables you to track the specific campaign.

- 5. Copy and paste the HTML code into a text file and send it to your Webmaster.**
- 6. Click Finished when done.**

You return to the Web-to-Lead Setup page.

### *Viewing and testing the form*

You can view and test the HTML code as an actual form by using your favorite Web publishing application and a browser.

To view and test the form, follow these steps:

- 1. Open a new file in your favorite Web publishing program.**

Popular programs include FrontPage, Dreamweaver, or HomeSite. You can even use Notepad or TextMate.
- 2. Copy and paste the HTML code in the HTML mode.**
- 3. Save the Web page in HTML format (not .txt!) on your computer.**
- 4. Open a browser and choose File⇨Open to open the Web page.**

A Web form appears with the lead fields that you selected. The form is relatively unformatted, but your Webmaster can apply code to make the form fit with your desired look and feel.

- 5. Fill out the basic form and click the Submit button.**

If you inserted a return URL, that page appears. If not, a page appears that displays the information that was sent to Salesforce.

- 6. Log in to Salesforce and click the Leads tab.**
- 7. Select Today's Leads from the Views drop-down list.**

The leads list for today appears. If the test lead isn't listed, click the Refresh button on your browser until the test lead appears.

**8. Click the test lead's link under the Name column to validate the information from your test lead.**

The lead record appears and displays the information that you submitted. Don't forget to delete the test lead record once you're comfortable that everything's working!

**9. Scroll down to the Campaign related list.**

You should see a link to the campaign and the default member status. If you selected the Campaign Member Status field when generating the HTML code, you can apply a member status to all leads derived from the Web form.

## *Manually updating member statuses*

If your campaign is designed to have recipients respond by phone or e-mail, your reps can manually update records as they interact with campaign members. Reps might have to create lead or contact records first if you didn't build your target list from Salesforce. For example, if you rent a third-party list for an e-mail campaign, the respondent might not yet be recorded in Salesforce.

To manually update a lead or contact responding to a campaign, follow these steps:

**1. In the sidebar Search, search for the lead or contact.**

See Chapter 2 for details on using Search.

**2. If you can't find the lead or contact record, create it.**

See Chapters 5 and 9 for details on creating contact and lead records, respectively. If you find the record, skip this step.

**3. Go to the specific lead or contact record page.**

**4. Click the Edit button, make any changes to the record, and click Save.**

For example, you might use the fields to enter additional information supplied by the respondent.

**5. Use the related lists to log any related information or future activities.**

### *Adding a member to a campaign*

In those circumstances when your target list was built externally, reps need to add the member to the campaign.

To manually add a member to a campaign, go to the lead or contact record and follow these steps:

- 1. On the Campaign History related list, click the Add to Campaign button.**

A Lookup box appears.

- 2. Select the appropriate campaign view from the Search Within drop-down list to narrow your options, and use the search bar to find a campaign within that view.**

The Search Results page appears.

- 3. Click the campaign name.**

The New Campaign Member page appears.

- 4. Select the appropriate member status from the Status drop-down list and click Save.**

The Campaign Member detail page appears.

### *Updating the status of a current member*

If the lead or contact is already linked to the campaign in Salesforce, you'll want to update the member status when he or she responds.

To update member status manually, go to the lead or contact record and follow these steps:

- 1. Scroll down the page to the Campaign History related list, click the Edit button next to the relevant Campaign Name.**

The Campaign Member Edit page appears.

- 2. Use the Status drop-down list to change the status and then click Save.**

## *Mass-updating campaign statuses*

If leads or contacts that are part of a campaign respond in a batch, you can do a mass update of campaign members. For example, if you sent a direct mail campaign to existing contacts and received a batch of business reply cards, you could perform a mass update. The following sections tell you two ways to update statuses: in a campaign or in a report. Sometimes you'll be working directly out of a campaign; other times you might be running a specific report that isn't campaign related (for example, an existing "Northern California Active Customers" report), but you might want to update the status of people that turn up in that data set.

### *Mass updating all member statuses in a campaign*

To mass update campaign statuses for all contacts or all leads in a campaign, log in to Salesforce and follow these steps:

- 1. Click the Campaigns tab and select the specific campaign whose members statuses you'd like to update.**

- 2. Click the Manage Members button.**

A picklist appears.

- 3. Select the Edit Members – Search option.**

The Manage Member page appears, with the Existing Members subtab selected.

- 4. Use the filter criteria, as needed, to narrow the members that you want to update.**

You can also manually select which members to update by checking the box next to their names in the results.

- 5. Select members to be updated for this campaign.**

You may select up to 200 members to update.

- 6. Click Update Status to apply the new status to your selected members.**

A status bar displays the results of the operation. You may continue updating by selecting new views, or click the Back to Campaign: [*Campaign Name*] link when done.

### *Mass updating all member statuses in a report*

To update the status of several members at once, follow these steps:

- 1. Click the Reports tab and scroll down to the Campaigns Reports heading.**

- 2. Click the Campaign Call Down Report link.**

A page appears, allowing you to select a specific campaign.

- 3. Use the Lookup icon to choose a campaign and click the Run Report button.**

A Campaign Call Down Report for your campaign appears.

- 4. Click the Add to Campaign button.**

The Add Members Wizard opens.

- 5. Confirm the campaign in the Campaign field. Use the Lookup icon to search for your match.**

6. After a campaign is selected, choose the appropriate status from the Member Status drop-down list.
7. Use the radio buttons to toggle whether you want the existing member statuses to be overridden by this member status.

The default is to not override existing member statuses. However, if your goal is to update all statuses of members in this report, do choose to override the status.

8. Click **Add to Campaign to continue**.

Step 2 of the wizard appears with a status message of your attempt.

9. **Verify the information and click Done.**

You return to your view page.



You may also mass update campaign statuses for contacts or leads in a campaign by updating the information in a .csv file first and then importing it. For example, a tradeshow exhibitor may give you a file of all show attendees that you can cross-reference with leads that you invited. After you know which of your invitees actually attended, you may import this file into Salesforce. Just make sure to add and edit a column for Member Status (unless all records will use the default status) and have a column for Lead or Contact ID. Then, click the Manage Members button, click the Update Status — Import File link, and follow the guidelines to update the campaign history. See the “Importing new campaign members” section for more information.

## Chapter 14

# Building Your Internet Marketing Channel

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### *In This Chapter*

- ▶ Understanding Internet marketing
  - ▶ Perfecting search engine marketing
  - ▶ Introducing Google AdWords
  - ▶ Using Salesforce for Google AdWords to track campaigns
- 

**S**earch engines help you navigate the vastness of the Internet by directing you to certain Web sites when you're not sure which sites may have what you're looking for. Very rarely, however, does a business have the name recognition to garner the top search result spot. What do you do if your business and its Web site aren't a destination yet? How will people ever hear of your business when they're looking on the Internet for what you're selling?

Enter Google, the 500-pound gorilla in the search engine space. Consumers go to Google for accurate and fast search results. And when they get accurate and helpful results, users come back to Google. More eyeballs on Google and its search results means that the importance of advertising on Google (or on any search engine, for that matter) becomes critical for any business, of any size. If your company isn't showing up high on that search result's first page, you're missing out on a huge amount of potential traffic to your site.

Google AdWords — an online tool — allows marketing managers to easily advertise on Google by quickly and simply creating and running ads for your business that appear on the Google Web site. AdWords ads are displayed alongside search results, giving your business exposure to a huge audience. Tracking these AdWords ad campaigns and analyzing which ones were more effective than others is now more important than ever.

In this chapter, we begin with a short intermission from Salesforce and provide an overview of Internet and search engine marketing. Rest assured, all this background is highly relevant when we explain how Google AdWords plays a key role. We culminate this chapter with showing you how to use

Salesforce for Google AdWords to track your AdWords campaigns directly in Salesforce so that you can take advantage of the activity tracking and reporting strengths of the platform.

## Understanding Internet Marketing

*Internet marketing (or online marketing)* refers to any marketing of your products or services done over the Internet. Sounds obvious, right? Well, underneath that rather broad phrase lie several key terms that you should know as a marketing manager:

- ✔ **Keyword:** A word or phrase that a user enters into a search engine
- ✔ **Search engine results page (SERP):** The pages of results a user gets after she enters a keyword into a search engine
- ✔ **Organic search (or natural search):** When a user finds a Web site by clicking links in the SERP that are naturally listed by the search engine, as opposed to a sponsored listing purchased by an advertiser
- ✔ **Sponsored link:** A link, paid for by an advertiser, that usually garners more premium placement on a results page
- ✔ **Search engine marketing (SEM):** A subset of Internet marketing that aims to promote a business's products and services by increasing its Web site's visibility in SERPs, using a variety of methods

### Paid placement advertising for your business

Even if you've done your best to get your Web site search-engine optimized, you're still not going to be guaranteed a top position in an organic search result. Maybe you're in a business with high competition for certain keywords, or maybe a change in the search engine's algorithm suddenly bumps you from the top spot. To increase the probability of a company appearing in an organic search listing, many companies also purchase paid placement ads on search listing pages.

This means that marketing managers (or advertisers) bid on keywords that they think their target audience will use when looking for a similar product or service. When a user enters that keyword, he may see that ad on the SERP,

identified as a Sponsored Link. Advertisers have to pay their bid amounts only when a user clicks that link.

Where do marketing managers go to place these bids? They head to various ad networks, one of which is run by Google. Google AdWords is the program that advertisers use to create ads and bid for keywords on Google.

For more in-depth discussion about paid advertising, check out Peter Kent's *Pay Per Click Search Engine Marketing For Dummies* (Wiley). To find out more about Google AdWords, pick up a copy of Howie Jacobson's *Google AdWords For Dummies*, 2nd Edition (Wiley).



*Search engine marketing (SEM)* is a rapidly evolving field and job function that focuses on marketing to potential customers by making sure relevant keyword searches return your company's Web site higher on the list than that of your competition and through paid advertising on search engine Web sites.

## *Introducing Salesforce for Google AdWords*

So you started advertising your business on Google. People have been clicking your ads. You've taken them to a landing page with a clearly defined call to action. Now they're hopefully filling out a form. These leads need to be captured somewhere, and you can capture them within Salesforce. Fortunately, the hard part of integrating Google AdWords and Salesforce so your online ads can be directly tied to your closed sales has been done through the Force.com software. Your part is easy.

To see the Salesforce for Google AdWords tab set, log in to Salesforce and select Google AdWords from the AppExchange drop-down list in the upper-right corner of your browser window.



If you don't see Salesforce for Google AdWords in your Force.com AppExchange drop-down list, your administrator may need to install it from the AppExchange directory (<http://www.appexchange.com>). To get more information on installing AppExchange apps, see Chapter 22.

Clicking the Google AdWords Setup tab takes you to the page that lets you associate your Google AdWords account to your Salesforce account, as shown in Figure 14-1.

## *Signing up for a Google AdWords account*

If your organization doesn't already have a Google AdWords account, you can sign up for one from the Google AdWords Setup tab. To create an AdWords account, perform the following steps:

- 1. From the Salesforce for Google AdWords app, click the Google AdWords Setup tab.**  
The AdWords Setup page appears.
- 2. Click the Don't Have an AdWords Account? Click Here to Sign Up link.**  
You're sent to the Google's AdWords Web site.
- 3. Click the Start Now button.**



**Figure 14-1:**  
The  
AdWords  
Setup  
screen in  
Salesforce.

#### 4. From the Google AdWords Wizard, follow the questions to

- Associate the proper e-mail address with your company's AdWords marketing.

This could be the e-mail address of the search engine marketing manager, or you can use an alias, as long as it routes to the SEM manager.

- Set your time zone and the currency you're using to make your keyword bids.
- Verify your AdWords account.



At any time, you're able to disconnect the connection between your Salesforce account and your Google AdWords account. You have to be logged in to both sites at the same time. See "Disconnecting Google AdWords" in the Salesforce online help for more detailed information.

## Linking your Google AdWords account

If you already have a Google AdWords account, perform the following steps to link your AdWords and Salesforce accounts:

1. **Get the AdWords Customer ID number. From the Google AdWords Setup tab, enter your AdWords account number in the AdWords Customer ID box.**

To find your AdWords Customer ID, log in to Google AdWords and look at the upper-right portion of the screen.

**2. Click the Link Account button.**

The linking could take a few hours. Wait for a confirmation e-mail to inform you when the link has been made.

**3. After you receive the confirmation e-mail, go back to the Google AdWords Setup tab and click the Log Into AdWords and Approve button to approve the linkage between the two sites.**

**4. Log in again to Google AdWords, and you see a dialog box displayed on the AdWords Campaign Management tab.**

It's basically informing you that Salesforce now has access to your AdWords account, and Google is asking you for approval of this action.

**5. Confirm that the radio button for the Yes option is selected and then click the Submit Decision button.**

After your Google AdWords account and your Salesforce account are linked, the AdWords Setup tab becomes the Google AdWords Account Summary page.



You may associate one, and only one, Salesforce account to one Google AdWords account. If you're already linked to one Salesforce account and want to associate your AdWords account with a different Salesforce account, you'll have to sever the existing link and create a new one. See "Disconnecting Google AdWords" in Salesforce's online help for more detailed information.

## *Integrating Lead Tracking with Google AdWords*

After you link your Google AdWords account to your Salesforce account, you're ready to dive in and start counting the leads flowing in, right? Almost. Your administrator needs to complete a few steps.

### *Creating a Web-to-Lead form*

You publish an ad on a search engine so that a user will click your link. That link should lead to a particular landing page that describes the call to action. Usually, this action requires the user to provide some information to get something of yours that he desires (such as viewing a Webinar or a whitepaper, or submitting a tradeshow registration). To set up a Web-to-Lead form that's integrated with Google AdWords, do the following.

1. From the Google AdWords Setup tab, go to the AdWords Lead Tracking section and click the Set Up Lead Tracking button.
2. Click the Create Web-to-Lead Form button.
3. Select the fields that you want to capture from your leads.
4. Enter the return URL of the page you want to display after the lead submits the form.
5. Click the Generate button.
6. Copy the HTML code that's generated and provide it to your Webmaster.
7. Click Finished to return to the Google AdWords Setup tab.



For more information on Web-to-Lead forms, check out Chapter 13.

## *Adding the tracking code to your Web pages*

Work with your Web site administrator to add some tracking code to each of your Web pages so you can better track your Web-generated lead sources.

The tracking code looks like this:

```
<!-- Begin Salesforce Tracking Code, place immediately before closing </BODY> tag
-->
<SCRIPT type="text/javascript" src="https://lct.salesforce.com/sfga.js">
</SCRIPT>
<SCRIPT type="text/javascript">__sfga();</SCRIPT>
<!-- End Salesforce Tracking Code, place immediately before closing </BODY> tag
-->
```

The code tells whether a lead came to your landing page via a Google ad, for example. Don't worry; it's not as scary as it looks. Many Web site administrators today have worked with Web site tracking tags for other applications, such as Google Analytics or Omniture.



The code is JavaScript. Here are some tips on where to put it:

- ✓ Place the code at the bottom of your pages. Usually, you do this in the footer template. Put it before the last `</BODY>` tag.
- ✓ Make sure the tracking tag isn't embedded within any other elements (such as `<TABLE>`, `<TR>`, `<SPAN>`, or `<DIV>` tags).

## Confirming your Web site setup

After your Web site administrator has embedded the tracking code into your Web site pages, it's time to confirm that Salesforce is successfully seeing it. To confirm your tracking code setup, follow these steps:



1. **From the Lead Tracking Setup page, under the Google AdWords Setup tab, click the Test Your Setup button.**
2. **Enter the URLs of pages on your site that have the tracking code.**  
Enter the URL of one of your landing pages.
3. **If the URL contains a Web-to-Lead form, make sure the Web-to-Lead Form? check box is selected.**
4. **Click the Run Test button and follow any additional instructions to resolve any outstanding issues.**

For example, if you didn't correctly copy and paste the full tracking code, you will get an error.

## Viewing Tracked Leads

After your tracking code has been embedded, you can start automatically tracking your online lead generation statuses. The Google AdWords Setup tab's home page now reveals the Google AdWords Account Summary. The Account Summary displays the number of leads from the following online sources:

- ✓ **Google AdWords:** The lead came from an AdWords ad.
- ✓ **Organic Search:** The lead came from an organic search.
- ✓ **Web Referral:** The lead came from a link that referred to your site.
- ✓ **Web Direct:** The lead came directly to your landing page.

## Reviewing the lead source detail

Because Salesforce for Google AdWords integrates your AdWords campaigns directly to your lead generation efforts, you can see exactly what search terms and which AdWords ad brought a lead to you. On a lead record, look in the Activity History related list for a Lead Source Detail task. Click this task to see detailed information in the body of the task about what keywords the searcher used and which ad they clicked.

## *Working your leads*

After your leads come into Salesforce, you should work them just as you would any other prospect. See Chapter 9 for more detailed information on managing leads and converting them into viable business opportunities.

## *Analyzing results with analytics*

A powerful benefit of Salesforce for Google AdWords is the standard set of lead generation and sales reports that come with the product, as well as the Google AdWords dashboard that provides you with visual feedback on your campaign efforts.

To access your Google AdWords reports, click the Reports tab and then choose Google AdWords Reports from the folder drop-down list. For more information on customizing reports, see Chapter 18.

To access your Google AdWords dashboard, go to the Google AdWords Account Summary page and click the Google AdWords Dashboard link. For more information on customizing dashboards, see Chapter 19.

## Chapter 15

# Driving Sales Effectiveness with Document Management

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### *In This Chapter*

- ▶ Setting up Salesforce Content
  - ▶ Using Content
  - ▶ Sharing and managing Content
  - ▶ Using Content with Chatter
  - ▶ Document storage
- 

**I**f you, as a sales or marketing manager, expect to get the most out of your sales reps, you have to put the best tools at their fingertips. Aside from a desk, chair, phone, and some caffeine, reps need accurate and compelling documentation: sell sheets, whitepapers, case studies, and so on. All too often, however, sales documents reside in multiple places: network drives, e-mails, desktops, and so on.

If your reps are losing business because they can't access the right documents, take advantage of Salesforce Content, which you can use to store the latest sales collateral in an easy-to-use, searchable workspace. And so long as your reps have an Internet connection, they can access Content, even if they're sitting in an airport in Omaha, Nebraska.

What does an easily accessible library mean? If you're a sales rep or manager, this means spending more time in front of your customers and less time chasing information. If you're in marketing or product management, you can better control the message to customers with the confidence that sales reps are providing customers with the most up-to-date information available. And, regardless of your role, you can individually store documents in your own personal folder.

For companies that need to organize a large amount of current documents, Salesforce Content also allows you to share content. Its additional capabilities allow you to search document contents, notify you when content is updated, and track user feedback. All these features help to further increase your sales and marketing teams' productivity.

In this chapter, we show you how to use the Salesforce Content as well as how to search for documents so your reps can put them to work to sell more effectively.

## *Understanding Salesforce Content*

Anyone who has ever managed a document repository for themselves or their company can tell you that repositories need to be maintained to remain effective. If you sell a variety of products, for example, your product sheets need to be updated as specs change, deleted if you retire products, and added as you release new products.

And even though Salesforce provides easy-to-use tools to help you manage the workload of document control, keeping a large volume of documents up to date can still be a daunting task. At some point, you may need a true content management system (CMS) to . . . well, manage your content.

If your company is committed to using Salesforce as the central repository for every department's content, you may want to consider using Salesforce Content for the following reasons: increased collaboration, document tagging, deeper search capabilities, and notification of content changes.

Before users can interact with Salesforce Content, they have to be granted permission to access that feature. Choose Setup⇨Administration Setup⇨Manage Users⇨Users, and then edit the users that you want maintaining your content management system. Make sure that the Salesforce Content User check box is selected for those users.

When Salesforce Content is enabled, select the Content app from the App drop-down list on your home page. You'll see the Content specific tabs: Workspaces and Content.

A *workspace* is more than just a folder for your content. It's a repository that allows your content to be fully searchable, including the content within your documents. A workspace can be shared to a specific set of users, and a document can be a member of multiple workspaces. For example, in some contexts, you may have a legal document in a Sales workspace — but that same legal document could also be referenced in a Legal workspace. Instead of making you choose one location or another for the file, Salesforce Content lets you reference this file from several workspaces.



## Using the Documents tab

Prior to the addition of Salesforce Content, you could store files in Salesforce on the Documents tab. Although not as robust as Content, the Documents tab is still available and useful in many ways. For example, you can host images referenced in e-mail templates, custom apps, and even force.com sites on the Documents tab. These files typically don't change and

definitely don't need to be collaborated on, so you can continue to store them by clicking on the Documents tab.

However, if you need the ability to preview files, collaborate on them with Chatter, or store larger size files, those files belong in Salesforce Content.



As of this writing, you can't automatically migrate documents from the standard Salesforce Documents tab to Salesforce Content. Migrating data requires some manual re-entry, but consider this a perfect time to review everything in your old directory to see what needs to be moved over and what doesn't need to make the trip. If you have more files than can be moved manually, consider contacting a Salesforce Consulting Partner to assist you in migrating the files in batch.

## Creating Workspaces

If you want Salesforce Content to be a highly effective sales tool for your staff, you have to organize your content so that people can easily find it. By using workspaces, you can sort files into logical groupings.

We've seen many different and effective approaches to organizing workspaces in Salesforce. Some companies like to separate content by product family; others prefer to take a vertical approach. The only right answer is the one that works for your company, so make sure you spend some time deciding on a naming convention for your workspaces. The My Workspaces list on the Workspaces home page will grow over time, so a clean and intuitive naming convention will help prevent a cluttered appearance. The following is a list of common workspaces that work for many organizations:

- ✓ Sell sheets
- ✓ Sales presentations
- ✓ Product data sheets
- ✓ Proposal templates
- ✓ Press releases

- ✓ Case studies
- ✓ General marketing
- ✓ Salesforce training

To create a workspace, you must first have the Create Workspaces permission. (If you're not sure, you can quickly find out by seeing whether you get past Step 1 in the following list. If you're not able to get past Step 1, ask your administrator to help.) To continue, click the Workspaces tab to go to the Workspaces home page and follow these steps:

- 1. Click the New button under the My Workspaces heading.**

A New Workspace Wizard appears.

- 2. Type a name and description for the workspace.**

- 3. When you're done, click Save and Close.**

The *Workspace Name* page appears, and you may begin contributing new content to your new workspace. You can return to your workspace at any time by clicking the Workspaces tab and looking at the My Workspaces list.



As you plan your content strategy, keep in mind that not all sales documents need to be in Salesforce Content. Some might be better suited as attachments on an account record; others you might not even want in Salesforce. As a general rule, files that might be re-useable or have wide applicability are good for Salesforce Content. Documents that relate to a specific account are typically more relevant as attachments to Account detail pages.

## Adding Content

Adding content to a workspace — also known as *contributing content* — is simple. To upload a new document, follow these steps:

- 1. Click the Workspaces tab in the Content app and then click the Contribute button.**

The Contribute Content page appears.

- 2. Click the Choose File button and browse your hard drive for the file that you want to upload.**

Salesforce Content automatically uploads the file you select.



You can add a Web site link to refer people to an online video or to information stored on your intranet by clicking the Do You Want to Link to a Website Instead? link.

After Salesforce Content uploads your document, it asks you to describe and publish your content as shown in Figure 15-1.



**3. Give your content a descriptive title.**

Follow standard naming conventions within your company.

**4. Select the Publish to a Shared Workspace radio button to store this file in a workspace.**

**5. Select the appropriate workspace from the drop-down menu.**

**6. If you're not the file's author, select another user from the Author drop-down menu.**

**7. (Optional) Add tags to this document if you want to identify it with words that may not be used in the standard workspace definitions.**

Separate words with commas; be sure to use words that people would commonly search for when looking for this document.

**8. Click Publish when you're done.**

The screenshot shows the 'Save or Publish Content' dialog box. At the top, it says 'Save or publish your content by completing the fields below.' and '[- Required Information]'. Below this is a header 'Dreamforce 2...'. The main section is 'Standard Information' and contains:
 

- Title: Dreamforce 2010 Contract
- Description: Dreamforce Booth Contract
- Sharing: Two radio buttons. 'Save in my personal workspace' is unselected, and 'Publish to a shared workspace' is selected. Below the radio buttons is a dropdown menu showing 'Dreamforce Workspace'.
- Tags: Dreamforce, Salesforce, Marketing, Booth

 A tooltip is visible over the workspace dropdown, stating: 'Select the location where you would like to publish your content. If you select a shared workspace, you can select tags and provide additional information.' At the bottom of the dialog are 'Publish' and 'Delete' buttons.

**Figure 15-1:**  
Contributing  
new con-  
tent in  
Salesforce.



If you have some content that you want to share with two different groups, like sales and marketing, rather than creating a new workspace just to house their shared documentation, you can associate content with the two workspaces by following these steps:

1. Return to the Workspaces home page.
2. Select a document from the Top Content section.
3. On the Content details page, click the Edit button.

4. **Select the Workspace Actions option and then the Share with Another Workspace sub-option.**
5. **Highlight additional Workspaces with which to share this document and click the Publish button.**

## Editing Content

After you contribute content to Content, you may need to update its details in Salesforce. Search for and go to your Content record from the Content tab and follow these steps:

1. **Click the Edit button.**

The Edit options drop-down list appears.

2. **Select the Edit Content Details option.**

The Edit Content window appears.

3. **Update the Title and Description.**

You can also upload new versions of files when changes have been made offline by selecting the Upload New Version option.

4. **(Optional) Add tags to this document if you want to identify it with words that may not be used in the standard workspace definitions.**

Separate words with commas.

5. **Click Save.**



Anyone subscribed to this Content record will be notified of any new versions uploaded.



You can subscribe to a Content record by clicking the Subscribe button at the top of the record.

## Finding Content

You can search for content from the search box located on the Content home page. Click the Content tab to go to the Content home page and then follow these steps:

1. **In the search box, type search terms, as shown in Figure 15-2.**

Optionally, check the filter check boxes to search only within a subset of all your Content.



In addition to searching filenames, Salesforce Content searches the actual text contained in files of the following formats: rich text format (RTF), UTF-8 encoded TXT, HTML, XML, Adobe PDF, and Microsoft Office 97–2007 Word, Excel, and PowerPoint files.

**Figure 15-2:**  
Search for  
content in  
Content.



**2. Click the Go button.**

The page reappears with a list of Content results based on your search.

**3. Select the appropriate check boxes for the file(s) you are looking for and then click the Download button to save copies to your computer.**

Alternatively, click the Title of Content record to see a preview of the file prior to downloading, as shown in Figure 15-3.

**Figure 15-3:**  
Preview  
content  
before  
down-  
loading.



## Getting Content Feedback with Chatter

With Chatter, you can upload your Content into Salesforce and instantly share it with your peers. You can either upload the file to your personal Chatter feed or as part of Chatter Group. Anyone following you on Chatter will see your uploaded file and can respond with comments. Think of it as a virtual bulletin board for you to post your works in progress and request feedback.

To upload Content via Chatter, go to your Chatter feed on the Home page or Profile tab and follow these steps:

**1. Type a description of the file in the Write Something text box.**

**2. Click the File link.**

The Attach a File section appears with your file options, as shown in Figure 15-4.

**3. Click the Upload a File from Your Computer link.**

If the file you want to attach is already uploaded to Salesforce, you can click the Select a File from Salesforce link.

**4. Click the Choose File button to browse your hard drive for the file that you want to upload.**

The File Upload dialog box appears.

**5. Find and highlight your file and click the Open button.**

The File Upload dialog box disappears.

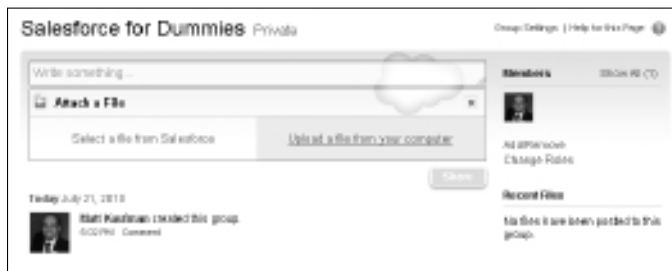
**6. Enter a description for the file.**

Salesforce Content uploads the file you select.

**7. Click the Share button.**

We talk more about Chatter in Chapter 6.

**Figure 15-4:**  
Uploading  
Content  
through  
Chatter.



# Part V

# Delighting Customers with Service Cloud

The 5<sup>th</sup> Wave

By Rich Tennant



"We're still working out the kinks in our cloud computing environment."

## *In this part . . .*

**A**sk any professional sports coach, and he or she can tell you one single truth: “Although offense gets you in the game, defense wins championships.”

You can say the same thing about your customer relationship management (CRM) strategy. If sales are the offense that puts revenue on the board, service and support are the keys to lasting success with your customers. You take a big step toward beating your competitors by keeping the customer satisfied.

And customer service success means that you have to do more than just deliver excellent service. Any good manager knows that to succeed you have to focus equally on managing costs, creating efficiencies, and addressing your customers with consistency across multiple communication channels.

To meet those demands, Salesforce Service Cloud gives you capabilities to deliver excellent service efficiently across multiple channels, with all the advantages of the cloud model, including easy deployment, rapid customization, and real-time reporting. If you’re not a support executive or a system administrator, you can still breeze through this part, dog-ear some of the pages, and send the book over to your support pal with a note reading, “Thinking of you.”



## Chapter 16

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# Performing Fast and Accurate Support

---

### *In This Chapter*

- ▶ Understanding service and support processes
  - ▶ Creating cases
  - ▶ Updating cases
  - ▶ Viewing case lists
  - ▶ Researching and resolving cases
  - ▶ Communicating the outcome
- 

**S**ervice Cloud 2 is the customer support application in Salesforce used to track and resolve cases. But it's more than that as well.

With Salesforce Service Cloud 2, you have all the tools at your fingertips to efficiently deliver excellent customer service while managing the costs of operations. In days and weeks, versus months and years, you can start and manage a fully integrated customer service strategy that supports the many channels that customers use to communicate with you.

In this chapter, we help you understand how to use Salesforce Service Cloud 2. We first discuss basic support rep processes for handling new cases, and then we cover how to manage the growing caseload within Salesforce Service Cloud 2.

## Walking through a Day in the Life of a Service Agent

Salesforce Service Cloud 2 follows a general process when it comes to managing cases. Service agents (you may call them *support reps*) commonly perform these tasks on any given day. The specific tasks may be different in your company, but you probably see some similarities:

- ✓ Responding to inbound e-mails and calls
- ✓ Taking down new cases from assigned queues
- ✓ Validating that the inquiry is coming from an authorized contact
- ✓ Creating a case to begin tracking efforts to resolve the issue
- ✓ Working the caseload, including researching solutions
- ✓ Managing service level agreements
- ✓ Communicating the resolution to the customer

At its core, customer support is all about accepting questions and answering them in a timely and consistent manner. How you handle your responses — and the scale on which you handle them — are more complicated issues.



High-volume call centers can take advantage of Salesforce's customer management and reporting capabilities by using Salesforce Call Center. Salesforce Call Center integrates Salesforce with third-party computer-telephony integration (CTI) systems, allowing your call center agents to do cool stuff, such as dial and receive calls right from their computers and see what contact records or cases are related to the calls.

## Understanding the Case Record

With Salesforce Service Cloud 2, the secret is the integrated relationship between two objects: cases and solutions. A *case* is a record of a customer service inquiry (you may call them *tickets*), as shown in Figure 16-1. Just like other common records, such as accounts and contacts, you can track all interactions on a case from a single detail page. And to manage all your cases, Salesforce Service Cloud 2 comes out of the box with all the tools that you need for routing, queuing, and escalating cases, plus complying with service level agreements (SLAs), if that applies to your company.

Case 00001008

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

Back to List | Custom Object Definitions

Individuals | Dan Achilles | Achille Helios | Case Comments | Worksheets | Case History

**Case Detail** [Edit](#) [Delete](#) [Clear Case](#) [Close](#)

Case Owner	Liz Ego <a href="#">Change</a>	Status	Closed
Case Number	00001008	Priority	Low
Contact Name	Tom Ego	Contact Phone	(512) 595-1080
Account Name	Grand Hotels & Resorts Ltd	Contact Email	tom_ego@grandhotels.com
Type	Other	Case Origin	Web
Case Reason	Feedback		
Solution Opened	4/16/2010 1:54 PM	Date/Time Closed	2/27/2009 10:08 AM
Product	SIC1000	Engineering Req Number	
Potential Liability	No	SLA Violation	No
Created By	Liz Ego, 4/16/2010 1:54 PM	Last Modified By	Liz Ego, 4/16/2010 1:54 PM
Subject	Customer service for portable generator needs backing up		
Description			
Customer Links	<a href="#">Up-sell</a>   <a href="#">Cross-sell Opportunity</a>		

[Edit](#) [Delete](#) [Clear Case](#) [Close](#)

**Solutions** [New Suggested Solutions](#) or [Find a Solution](#) [Solutions Help](#)

No Solutions Attached

**Open Activities** [New Tasks](#) [New Events](#) [Open Activities Help](#)

No records to display

**Activity History** [Log A Call](#) [Mail Merge](#) [Send An Email](#) [Activity History Help](#)

No records to display

**Case Comments** [New](#) [Case Comments Help](#)

No records to display

**Attachments** [Attach File](#) [Attachments Help](#)

No records to display

**Case History** [Case History Help](#)

No records to display

**Figure 16-1:**  
Introducing  
the case  
record.

A case record comes preconfigured with standard fields and two icons commonly used for case management. Most of the standard fields are self-explanatory, but in the following list, we highlight key fields that are less obvious:

- ✔ **Status:** This field defines the important statuses in your case process. It comes preconfigured with a basic process, but you should modify the values to fit your process. If you're an Enterprise or Unlimited Edition user, you can use this field to distinguish multiple support processes appropriate to the different kinds of cases you want to track.
- ✔ **Case Number:** When you create a case, Salesforce Service Cloud 2 automatically assigns a sequential number used for tracking. If you're an administrator, you can change your starting number and numbering format. See Chapter 17 for more information on customizing Service Cloud 2.

- ✔ **Type:** Use this picklist field to define the type of case. Salesforce Service Cloud 2 presets this list with selections that include Problem and Question, but you can modify the picklist to match your categories.
- ✔ **Case Reason:** Use this picklist field to specify the reason the case was opened. Many companies track this field to identify areas of customer service that they can improve. Of course, you can also modify this list to suit your needs.
- ✔ **Case Origin:** Use this field to record from which channel the case originated — for example, by phone, e-mail, or Web. Many companies report on this field to understand and improve the methods by which customers interact with service and support agents.
- ✔ **Internal Comments:** Use this field to jot brief comments on this case to communicate internal messages, as needed. Customers or people outside of your company will not see this field by default. However, internal comments that are marked Public may be viewed by clients in the Self-Service Portal, if you have it enabled.

## *Creating a Case*

One of the main responsibilities of an agent is handling new inbound inquiries. Writing notes on little sticky notes that you attach to your monitor may not be the best way to track information, especially if you have terrible handwriting. In the following sections, we discuss how to begin the case management process in Salesforce Service Cloud 2, so the right information is tracked for the right customers.

### *Validating the contact*

The first step in creating a case is validating the company and contact information to see whether any special circumstances or SLAs exist. Can't have just any random person taking up your precious time, can we? This information should reside in custom fields on the account record. For example, to do this in response to an inbound call, log in to Salesforce Service Cloud 2 and follow these steps:

1. **Type the company name (or account number — whatever your company uses to identify its customers) into the Search field on the sidebar on your Home page and then click the Go button.**

The Search Results page appears. Hopefully, you see the account name listed. If it's not listed, then you should have some business processes in place to determine how to verify that the person or business calling in is indeed a customer.

**2. Click the Account Name.**

The Account record appears. Verify the business's information on this record that helps you identify that you're allowed to support this company. You might verify an address or an account number. You should confirm those processes first before using Service Cloud 2.

**3. Look at the Contact detail list to locate the person with the problem.**

Again, depending on your company's policies, you may or may not have specific customer contacts authorized to call you for support.

**4. Click the Contact Name.**

The Contact record appears. Verify information on this record that helps you identify that this person is permitted to call for support. If the contact record doesn't already exist, create a new contact record. For more information, read through to Chapter 5.

## *Entering new cases*

After you qualify the customer, you have to associate a case to each new issue you receive. Because cases are associated with contacts, the best, most reliable way to create case records is by starting from the relevant Contact detail page. From the Contact detail page, you can add a case by using either the Create New drop-down list on the sidebar or the New button on the Cases related list. The result is the same in both situations, and you automatically prefill the Contact lookup field. By doing this, you can always find your case, and your case activities will be listed on the overall Contact detail page.

To create cases by using the best practice, follow these steps:

**1. From the Contact detail page, click the New button on the Cases related list.**

The Edit mode of a new case appears.

**2. Fill in the fields as much as you can or as required.**

Notice that the Contact field is prefilled with the contact you were working from.

**3. When you're done, click one of the following buttons:**

- *Save*: Brings up the Case detail page.
- *Save & Close*: Saves the current case info and automatically takes you to the Close Case detail page, as shown in Figure 16-2, where you select the appropriate closed case status and add additional details. Use this to quickly resolve an issue.

**Figure 16-2:**  
Closing a case.

- *Save & New*: Saves the current contact info and automatically opens a new, blank contact record.
- *Check Spelling*: Checks the spelling of the contents of the Description field.



TIP

To clone a case, click the Clone button at the top or bottom of the case record. If it's the day of a new product or feature release, and many customers are reporting the same problem, the Clone button will come in handy for you. This is similar behavior across other records in the Salesforce family.



TECHNICAL STUFF

You can also set up Service Cloud 2 to generate a new case from an e-mail sent to specific addresses (like `support@yourcompany.com`), also known as the Email-to-Case feature. There are a few options, depending on your company's e-mail requirements. For example, if you need to have all e-mail traffic behind your firewall and will be receiving attachments bigger than 10MB, check out Email-to-Case at

[http://wiki.developerforce.com/index.php/Members:Email\\_To\\_Case](http://wiki.developerforce.com/index.php/Members:Email_To_Case)

Check with your account executive to discuss other options. Of course, you could always have a Web-to-Case form set up (similar to the Web-to-Leads we discuss in Chapter 13), too.

## Managing Cases

As a service or support agent, one of your key goals as a case owner is to address and resolve many customer issues as quickly as possible. Ideally, the need for speed is balanced with some defined processes to ensure a sense of order. Over time, your caseload will build up as different cases take different lengths of time to resolve. You'll work off the Cases home page, which you access by clicking the Cases tab at the top of the page. There you'll be able to see the most recent cases and adjust your views so you can see the cases that are most relevant to you (for example, maybe you handle all the Platinum requests for the West Coast and just want to see those). In the following sections, we describe how to efficiently update a case as you work it, and then we discuss how to manage your growing caseload.

### Updating case fields

As you work your cases, you may need to modify case information. To update a case, follow these steps:

**1. Type the case number in the Search tool and then click Go.**

If you don't have this information (usually from your customer), don't worry, you can still enter whatever information you have about the customer into the search tool. It may take a few extra hops to get to the case as you return a contact or account record, but the beauty of Service Cloud is that these records are all related, via the Account record. A Search Results page appears.

**2. Click the desired Case Number link.**

The Case detail page appears.

**3. Click the Edit button at the top of the case record.**

The case record appears in Edit mode.

**4. Update the fields, as necessary, and then click Save.**

The Case detail page reappears. Notice that the fields you edited have been changed.



Case comments can't have their own related list on the case detail record and are meant to record any short internal conversations that agents may review at a glance. If you have the Self-Service Portal set up (see Chapter 17 for more information), agents may optionally share certain comments with contacts on a case.

## *Reassigning case ownership*

After you create cases in Salesforce, you might need to transfer them — reassign them — to the right people: folks who become responsible for case resolution after it's been escalated, for example.

To reassign a case, go to the case record and follow these steps:

- 1. Next to the Case Owner field, click the Change link.**

The link is in square brackets. The Change Case Owner page appears.

- 2. Select the user to whom you're assigning the case.**

(Optional) Select the check box to choose to notify the recipient with an e-mail.

- 3. When you're done, click Save.**

The case record reappears. Notice that the Case Owner field has changed to the assigned user.

## *Getting a clue on views and queues*

Case views and case queues are accessed from the same location — the Case View drop-down list on the Cases home page.

A *case view* is a list of cases that match certain criteria. When you select a view, you're basically specifying criteria to filter the results that you get back. The advantage of using a view, versus searching, is that you can use the view over and over again.

If your company has several agents resolving cases for a variety of products and services, your administrator may set up *case queues* to automatically funnel cases to the right pairs of eyeballs. For example, you may use your Web site to collect both product and billing inquiries. Case queues would allow support agents to grab new cases from the product queue, while accounts receivable staff can monitor the billing queue.

To try out a predefined view, do the following:

- 1. On the Cases home page, open the Cases Views drop-down list.**

The four default options appear and maybe some other choices that have already been created for you.



## 2. Select the My Open Cases option.

The My Open Cases list opens, as shown in Figure 16-3.

Notice that Salesforce lays the list out with standard columns that correspond to commonly used case fields, plus an Action column so you can quickly modify a record.

**Figure 16-3:**  
Viewing a  
preset  
case list.

Action	Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owner
<input type="checkbox"/> Edit   Del	00001234	Patrick Sells	Broken printer...	New	Low	4/18/2010 1:54 PM	LSM
<input type="checkbox"/> Edit   Del	00001235	Frank Gong	Maintenance...	New	Low	4/18/2010 1:54 PM	LSM
<input type="checkbox"/> Edit   Del	00001236	Bob L. Brown	Design issue...	New	Low	4/18/2010 1:54 PM	LSM

## 3. Click a column header to re-sort the list page.

## 4. Open the record for any case by clicking a link in the Case Number column.

A Case detail page appears.

## 5. Click the Back button on your browser, and then click the Edit button on the same row as the contact you just clicked.

The case record appears in Edit mode, and you can make changes to the data.

## 6. Mark the check boxes on certain rows if you'd like to close, change ownership, or change the case status *en masse*. Then, click the corresponding button to perform the group action.

The case record appears in Edit mode for that action, and you can make changes, as appropriate.

Queues ensure that everyone has an equal chance at the latest cases.

To choose a case from a queue, follow these steps:

## 1. From the Cases home page, select the view that corresponds to a queue you're supposed to monitor.

The list page appears.

## 2. In the Action column of the case list, select the check boxes for the case records that you want to accept and begin working on.

## 3. Click the Accept button to take ownership of these cases.

You've now claimed these cases from the general pool of new cases.

## *Creating custom case views*

If you want special lists for the way that you track your cases, we recommend building custom views. For most objects with tabs in Salesforce, you can create a custom view. See Chapter 4 to find out how to generally create a custom view.

## *Sharing Knowledge with Salesforce Knowledge*

Salesforce Knowledge introduces a more robust knowledge base option for support departments and call centers. It's smart enough to return relevant answer options to internal support agents or customers, based on its evaluation of your problem description. Multiple filtering options also let you find information based on multiple attributes; for example, based on the type of product and the topic of the issue (GenWatt Engine products and Broken Circuit topics). It's available for Enterprise, Unlimited, and Developer Edition users for an additional price. (Talk to your account executive for more information.)



If you're using an existing knowledge base solution, you can import those solutions into Salesforce Knowledge. Go to the Service Cloud 2 Online Help Content from the Help link at the top right of your Salesforce page, and choose Salesforce Knowledge → Setting Up Salesforce Knowledge → Importing Articles.

We discuss Salesforce Knowledge in depth in Chapter 17.

## *Researching and Resolving Cases*

When you have your set of assigned cases, the next milestone is to resolve the customer's issue. In general, case resolution means responding to the issue and doing it efficiently so you minimize time spent on repetitive tasks. For example, typing out the same explanation to "Where's the Any key?" (you know, when the manual says to "hit any key") can tend to get stale after a while.

## *Understanding solutions*

A *solution* is a plain text response to a commonly asked question. As you resolve cases, service reps can both apply existing solutions from your knowledge base and create new ones that your teams can use in the future.

Using solutions helps new agents ramp-up more quickly and makes any agent on your team proficient on a wider range of topics. The following list describes additional terms used when discussing solutions:

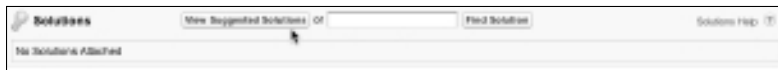
- ✔ A solution has a related list that indicates all the cases that use the solution. This association is the key to a feature called *Suggested Solutions*, which substantially reduces the amount of time it takes to get answers to cases. In essence, it finds similar cases and suggests solutions that have answered those cases.
- ✔ *Solution Categories* group similar solutions together. One solution may belong to one or more categories.
- ✔ Your collection of solutions is often referred to as the *knowledge base* and can populate both a Self-Service Portal and a searchable FAQ for a public Web site. See the earlier section, “Sharing Knowledge with Salesforce Knowledge” for more information about the Salesforce Knowledge Base.

## Finding solutions

From the Case record, look for solutions by using the method described in this section.

If the Suggested Solutions feature is enabled, you’ll see a View Suggested Solutions button on the Solutions related list, as shown in Figure 16-4. Click the View Suggested Solutions button to view relevant solutions. We generally recommend that you associate only reviewed solutions with cases.

**Figure 16-4:**  
Viewing  
suggested  
solutions.



To look for solutions by using the Search box in the Solutions related list, follow these steps:

- 1. In the Search box of the Solutions related list, enter keywords related to a possible solution.**

After you get more familiar with solutions and their unique IDs, you may even look up a solution by part of its solution number.

2. **If your company uses solution categories, select a category in which to search.**

3. **Click Find Solution.**

The Find Solution for Case *Number* page appears. If Solutions Categories are enabled, search results are first shown by category and subcategory groupings.

## *Attaching solutions to a case*

When you're viewing the relevant solutions, you want to find the appropriate solution(s) and associate it (or them) to your case. You may do this in two ways:

- ✓ From the reviewed list of relevant solutions, click the Select link next to a reviewed solution.
- ✓ If you need to confirm the details of the solution first, click the Solution Title link, and then click the Select button on the Solution detail page when you're sure of the right solution.

After either method, you're returned to the Case record page. In the Solutions related list, you see the solution you just attached. If you add more than one solution to a case, simply repeat the steps for finding solutions and associate them to your case, as appropriate.



Attaching a solution to a case counts as a solution being “used” in Salesforce Service Cloud 2. This tally can later be analyzed in reports so support executives and product managers can see which problems or questions are being reported the most (which, in turn, warrant the use of certain solutions). By getting measurable feedback on issues, the support and product teams can work more closely to address the actual issue before cases need to be logged.

## *Communicating the Outcome*

After you research your case and find the right solutions for it, you now must communicate this resolution to your customer before you officially mark the case closed. Make sure your administrator has created appropriate case resolution e-mails for your support team.

## *Responding with standard e-mail templates*

Standard e-mail templates allow you to merge your attached solutions into the body of an e-mail template, which you then send to your customer. This increases the efficiency with which the support team can answer questions. To provide a response to a customer using an e-mail template, read through Chapter 8 for details.

## *Closing a case*

After you resolve your case and successfully notify your customer, it's time to close the case and move on to the next one. One of the key advantages of Salesforce Service Cloud 2 is its easy-to-use reporting system (more about that in Chapter 18). Additional information is collected after you close a case, so support executives can use the collective feedback to continuously improve the customer experience.

To close a case, follow these steps:

**1. From the Case record, click the Close Case button.**

Alternatively, if you're in the edit page for the case record, click Save & Close. The Close Case page appears in Edit mode.

**2. Select the appropriate closed case status and add any internal comments, if needed.**

Other fields are shown based on your company's customizations. If you're a Professional, Enterprise, or Unlimited Edition user, you'll also see an additional section allowing you to create a solution from this case.

**3. Edit the solution title as needed so the solution may be applicable for all customers.**

**4. Select the Submit to Knowledge Base check box to submit the solution for review by your team's designated solution managers.**

This will also link the case to your new solution.

**5. Click Save when finished.**

If you want to display common solutions to the public so that customers can look for their own solutions, you have a few options. Both Salesforce

Knowledge and the default Solutions can be set up for this. Check with your account executive or customer success manager for details.



If your company is using Twitter to monitor and respond to customer support interactions, you can use Salesforce for Twitter to capture tweets and apply relevant templated responses to them. Visit the Force.com AppExchange and search for “Twitter” for more details.

## Chapter 17

# Managing Your Service Cloud 2 Solution

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### *In This Chapter*

- ▶ Customizing cases
  - ▶ Using case queues and assignment rules
  - ▶ Building a knowledge base
  - ▶ Automating your support processes
  - ▶ Improving team productivity
- 

**T**he heart of any successful customer service application is case management, and Salesforce Service & Support provides a fully integrated solution to track, resolve, and manage all customer interactions, regardless of the point of entry.

Your support team can log in and begin using cases and solutions immediately; but they'll be much more successful if you invest some time upfront to customize the program to the team's exact needs.

In this chapter, we guide the support executive or administrator on setting up case processes and customizing cases. Next, we review how to configure a scalable knowledge base. Then, we cover the different methods for automating customer service processes to improve agent efficiency.

## *Preparing Your Salesforce Service Cloud Strategy*

As a support executive, if you want to get Salesforce Service & Support working for you, you need to do some careful upfront planning. After you think through your processes, you can customize cases either by yourself or with

your Salesforce Service & Support administrator. Here are some tips to think about before you get started:

- ✔ **Define and prioritize your service and support objectives.**
- ✔ **Identify and acknowledge your key challenges.** Try to identify the biggest ones first.
- ✔ **Start with the end in mind.** The best way to customize your application is to decide what you want to measure first.
- ✔ **Map out your key processes.** If you're a Visio whiz, use that tool. If not, grab a marker and diagram your key processes on a whiteboard or flip chart. For different types of support issues, think about the similar and different types of information that you want your reps to capture.
- ✔ **Figure out the best approach for your business.** You have many different ways to tackle a business issue with Salesforce Service & Support — some of these approaches work better than others.
- ✔ **Assess how much of your support efforts you and your team can share with your customers.** If your users would welcome this sort of change, you may want to set up the Customer Portal.
- ✔ **Keep it simple.** Don't sacrifice your objectives just to keep things simple. The more complexity you build, the greater the risk that people won't use the application.



For cases, as with other objects, Salesforce Service & Support provides some common design elements that let you customize the record. As you consider customizing cases, keep in mind that you should strive for ease of use, relevance, and data that can help you manage your support executive job while allowing your agents to efficiently manage theirs. (See Chapter 20 for the how-to details on adding new fields, customizing page layouts, adding record types, and other design tricks.)

## *Automating Case Management*

As a support executive or system administrator with the right permissions, one of your biggest challenges will be managing and administering a growing collection of cases. And because support centers need to maintain customer satisfaction, efficiently opening and resolving cases and keeping customers happy are paramount to your bottom line.

The Salesforce Service Cloud provides built-in tools to help efficiently queue, route, and escalate cases according to your support needs. By distributing and managing case workload more effectively, you ensure that the right agents address the right cases to comply with internal or external service level agreements (SLAs).



## Adding case queues

To set up a case queue, choose Setup⇨Customize⇨Cases⇨Queues, and then follow these steps:

1. **From the Case Queues page, click the New button.**
2. **Complete the required fields for Queue Name and Queue Email.**

The e-mail address will be used for notifications, such as when a new case has been added to the queue. The e-mail can be for an individual or point to a distribution list (on your e-mail server).
3. **Move Available Members into the Selected Members column to add them to the queue.**
4. **When you're finished, click Save.**

The Case Queues page reappears with your new queue displayed.

## Using assignment rules for routing

Assignment rules are key to efficient and timely routing of new cases. Your team can apply these assignment rules when adding or editing cases, or when customers submit cases themselves through your Web site, e-mail, or the Customer Portal. (See later sections for more on supporting multiple channels.) These rules allow cases to route directly to users or queues.



For assignments, escalations, and other support automation tools, don't forget to set up e-mail templates for notifications — both internal and external. See Chapter 8 for tips on customizing e-mail templates.

To set up assignment rules, choose Setup⇨Customize⇨Cases⇨Assignment Rules, and then follow these steps:

1. **From the Case Assignment Rule page, click the New button.**

A New Case Assignment Rule page appears.
2. **Select a Default Case Owner or Automated Case User if prompted.**
  - A *default case owner* is the person where the buck stops — the person to whom the case routes when the assignment rules can't seem to find anyone else.
  - *Automated case users* are the owners of cases that are created by Salesforce Service & Support, as opposed to being manually created by a human being.

3. **Type a rule name and select the Set This as the Active Case Assignment Rule check box if you want this to be the active rule; then click Save.**

Typically, you have one case assignment rule to serve all your case assignment purposes. So, for example, you may have an active assignment rule called US Standard Support and another called US Holiday Support that you activate only when your holiday schedule is running.

The Case Assignment Rules page appears with your rule listed.

4. **Select the rule name for the assignment rule you just created.**

The Case Assignment Rule page for your rule appears.

5. **Click New under the Rule Entries related list.**

A Rule Entry Edit page appears, as shown in Figure 17-1.

6. **In Step 1 of the Rule Entry Edit page, enter a number for the order of the entry you're about to make.**

The Salesforce Service Cloud evaluates these rule entries until it finds a match and then stops. The first successful match satisfies the rule, and an assignment is made accordingly.

7. **In Step 2 of the Rule Entry Edit page, enter criteria for the rule entry.**

For example, if your company provides a different support team for partner inquiries, you might enter a criterion of **Account: Type Equals Partner** to denote cases that relate to partners.



Enter the rule entry Save Save & New Cancel

Step 1: Set the order in which this rule entry will be processed |= Required Information

Sort Order

Step 2: Select the criteria for this rule entry

Run this rule if the following :

Field	Operator	Value	
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	

Advanced Options...

Step 3: Select the user or queue to assign the case to

Do Not Reassign Owner

Step 4: Optionally, select predefined case teams to add to the case

Predefined Case Teams

[Add Row](#)

Replace Any Existing Predefined Case Teams on the Case

Save Save & New Cancel

**Figure 17-1:**  
Creating a  
new case  
assignment  
rule.

8. In Step 3 of the Rule Entry Edit page, select the user or queue to assign the case to and the notification template that goes to the new owner.
9. When you're finished, click Save, or click Save & New to set up another rule entry.

When completed, the Case Assignment Rule page for your assignment rule appears with the related list of rule entries.

## *Automating case escalation*

To make sure that no case is ever overlooked and proper attention is paid to priority cases, you can apply *escalation rules*. Escalation rules prevent Chicken Little–type overreactions — so you don't unnecessarily run around telling your team that the sky is falling . . . unless it really is. Instead, these rules allow you to create automated actions when cases with certain criteria are still open or untouched after a set duration. When escalating, you set up rule entries (similar to assignment rule entries) to notify users, reassign the case, or both.

To establish escalation rules, choose Setup⇒Customize⇒Cases⇒Escalation Rules, and then follow these steps:

1. From the Case Escalation Rules page, click the New button.
2. Type a name, select the check box if you want this to be the active rule, and click Save.

As with case assignment rules mentioned in the preceding section, only one case escalation rule may be in effect at one time.

A Case Escalation Rules page appears with your rule listed.

3. Click the rule name for the escalation rule you just created.

The Case Escalation Rule page for your rule appears.

4. Click New under the Rule Entries related list.

The Rule Entry Edit page appears.

5. Complete the rule entry fields, following these guidelines:

- For tips on completing Step 2 of the rule entry fields, see Steps 5–7 in the preceding section.
- In Step 3, select the Ignore Business Hours check box only if you want the escalation rules to be in effect at all times (this means weekends and holidays, folks).
- In Step 4, select a radio button to determine how you want escalation times to be set.



6. Click **Save**, or click **Save & New** to repeat the process for additional rule entries.

The Rule Entry Edit page reappears with a related list for Escalation Actions.

7. Click the **New** button on the Escalation Actions related list.

An Escalation Action Edit page appears, as shown in Figure 17-2.

**Figure 17-2:**  
Specify actions related to an escalation rule entry.



8. In **Step 1**, specify the time criteria in the **Age Over (Business Hours)** field to trigger the escalation rule.

You can set escalations to occur after 30-minute intervals.

9. In **Step 2**, select the user or queue that will be reassigned ownership of the escalated case.

You may also select a notification template for the recipient.

10. In **Step 3**, select a user to notify after an escalation occurs.

You must also select a notification template for the recipient.

11. Select the **Notify Case Owner** check box to ensure that the case owner is notified when one of his cases escalates.

12. In the **Additional Emails** field, enter as many as five e-mail addresses that you want notified of this escalation.

These addresses don't have to belong to Salesforce Service & Support users.

13. Click **Save**.

The Rule Entry Edit page reappears.

Repeat Steps 8–13 as often as needed to add your escalation rule entries, plus corresponding actions.



Another way to automate assigning tasks and sending e-mail alerts within your organization is through workflow rules. Workflow is available to Enterprise and Unlimited Edition customers only; for details, see Chapter 19.

## Capturing and Associating Cases Efficiently

In addition to using the phone, customers want to access support in two other common ways: directly from the Web and via e-mail. You can have your customers use a Web-based form or let them send an e-mail to your support organization. For either method, the Salesforce Service Cloud can enable these additional channels and make it easy for your agents to follow up. In this section, we describe the various options you can use to begin collecting this information from your Web site.

Where do customers go when they have problems? Many customers would be happy if they could simply log the problem and be assured of a prompt response. With Web-to-Case, you can quickly generate an HTML form that captures cases submitted from your Web site. Then, by using case assignment rules, new cases can route directly to the agents or queues responsible for handling these inquiries. (See “Using assignment rules for routing,” earlier in this chapter, for information on automating assignments.)

To automate Web-to-Case, choose Setup⇨Customize⇨Self-Service⇨Web-to-Case and follow these steps:

1. From the **Capturing Cases from Your Web Site** page, review the general outline, and then click the **Generate the HTML** link.

The Capture Cases page appears, as shown in Figure 17-3.

**Figure 17-3:**  
Generating the HTML to capture cases from your Web site.

**Capture Cases**

Select the fields to include:

Available Fields	Selected
Company	Contact Name
Type	Email
Status	Phone
Case Reason	Subject
Priority	Description
Minutes	
Spam Check Submission	
Spam Status	
Twitter Username	

NOTE: Would you like to add custom fields that you do not see listed under Available Fields? You can set up custom lead fields to gather additional information from your website. [Tell me more.](#)

Visible in Self-Service Portal

Enter the URL that the user will be returned to:

URL:

## 2. At this page

- a. Type a return URL where the users will end up after submitting their cases.
- b. Choose whether you want the form to be visible in the Self-Service Portal so that customers can submit new cases while monitoring existing ones (more on that later).
- c. Select the case fields to include on the form.
- d. Click Generate.

The return URL you specify usually leads to a thank-you page or your support home page. After you click Generate, a new page appears with the HTML code in a box.

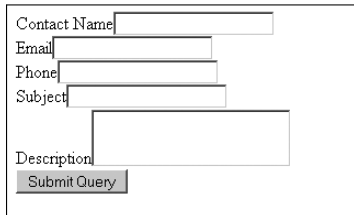
## 3. Copy and paste the HTML code into a page hosted on your Web server. Click Finished when done.

You'll want to review the notes at the top of the HTML, but this step is pretty simple. If such a review seems foreign to you, simply copy and paste the HTML into an e-mail and send it to your Webmaster for help with this step. She knows what to do.

You return to the Capturing Cases from Your Web Site page.

When the Web page with your case-capturing form is live, fill out the form, like the unformatted sample in Figure 17-4, and test it to make sure the case routes to the right resource.

**Figure 17-4:**  
Test an unformatted Web-to-Case form.



The image shows a simple web form with the following fields and a button:

- Contact Name:
- Email:
- Phone:
- Subject:
- Description:
- Submit Query:



When customers have issues, they often want to send an e-mail to your support team, expecting a timely response. With Email-to-Case, customers can send e-mail messages to aliases you create, which route new cases directly to the assigned resources and populate relevant case fields. Even attachments stay attached to the original e-mail message. Setting this up is simple and can be done by choosing Setup → App Setup → Configure → Cases → Email-to-Case. Follow the onscreen instructions and coordinate with your mail server administrator.



The Salesforce Service Cloud can also route responses to your customers after they submit a case by using the Web or e-mail. This response informs the customer that your company has gotten the submission, and it can explain support policies, too. As long as you have those e-mail templates defined (see Chapter 8), you can assign them to use when responding to cases from Web-to-Case, Email-to-Case, or even the Customer Portal. Choose Setup⇨Configure⇨Cases⇨Auto-Response Rules to configure this.

## Harvesting Knowledge

Service Cloud from salesforce.com enables you to join the conversations happening on the Web about your products and services. Instead of creating an additional channel for your agents to monitor, salesforce.com has already thought about how to capture these conversations and respond efficiently to the topics discussed.

## Understanding Salesforce Knowledge

The debut of Salesforce Knowledge introduces a more robust knowledge base solution for support departments and call centers. It's available for Enterprise, Unlimited, and Developer Edition users for an additional price (talk to your account executive for more information).



If you're using an existing knowledge base solution, you can import those solutions into Salesforce Knowledge. The details are available in the Service Cloud Online Help Content; choose Knowledge Base⇨Configuring Salesforce Knowledge⇨Importing Articles.

## Articulating articles

Salesforce Knowledge has its own vocabulary:

- ✓ **Articles** are the pieces of content and knowledge contributed by internal and external experts. Figure 17-5 shows several articles that could solve a customer's problem.
- ✓ **Article Types** identify each article and determine which template the article will follow. For example, an article type of FAQ could have the mandatory fields of Question and Answer. When you create a new article, you must define what article type it's associated with, which then determines the layout of the fields you'll need to fill out.



- ✔ **Data categories** organize articles in Salesforce Knowledge. They can be nested if you need it — for example, if you organize your products by product line and then part number.

Data categories can be mapped to users' roles to decide what articles users can and can't see.

- ✔ **Category groups** are containers for data categories with hierarchies. If you have a Nimbus line of flying broomsticks, that category could be nested below a Products category group.
- ✔ **Channel** describes one of various methods in which an article is available for viewing: the Internal app (where only Service Cloud users can see the article), the Customer Portal (where customers with the right permissions may see it on the portal page), and the Public Knowledge Base for Salesforce Knowledge (available on the AppExchange).
- ✔ **Synonyms** are words or phrases that you associate together so that article searches matching one of those words or phrases will return additional related results associated with the other words. For example, you could associate the words *headset* and *head set* so any relevant articles with either keyword would appear in the search results.
- ✔ A **Synonym Group** contains two or more synonyms.

**Figure 17-5:**  
Searching  
for  
Salesforce  
Knowledge  
articles.



To publish your articles to the Public Knowledge Base channel, you'll need to download the Public Knowledge Base app from the salesforce.com AppExchange at [www.appexchange.com](http://www.appexchange.com). Creating a Public Knowledge Base requires Force.com Sites and Force.com pages.



Articles are the content on which your internal product expertise and externally sourced conversations are housed for future reference.



## Creating articles

To try your hand at creating an article, do the following:

1. **On the Article Management tab, click New.**

The New Article box appears.

2. **Choose an article type, enter the article title, and click OK.**

The article type determines the page layout of the type of article you'll be writing.

3. **Edit the article's fields as appropriate.**

4. **If categories have already been set up in the Categories area, choose the categories to associate with your article by clicking Edit next to a category group to open the Category Selection dialog box. If categories have not been set up yet, skip to Step 8.**

5. **In the Available Categories list, expand the category hierarchy to select a category.**

6. **Click Add to move a selected category to the Selected Categories list.**

As many as eight categories are allowed there.

7. **Click OK.**

8. **In the Channels area, select where your article will be available after it's published. You can select one or more channels in which to publish your article.**

- *Internal App*: These articles are available only to users logged in to Salesforce.
- *Partner Portal*: These articles are available to your partners via your partner portal.
- *Customer Portal*: These articles are available to your customers who log in to your customer portal.
- *Public Knowledge Base*: These articles are available to anyone via your Web site.

9. **Click Save to save your changes, close the article, and go to the Article Management tab.**

10. **(Optional) Create an assignment for a user to edit or review the article.**



## *Publishing articles*

After a draft article has been reviewed and has passed your internal quality standards for publishing, do the following to publish an article:



1. **On the Article Management tab, open the My Draft Articles or All Draft Articles view, select a check box in the list, and click Publish.**

Alternatively, click Publish on either the detail page or the edit page of an article.

2. **Select Publish Article(s) Now.**
3. **If the article has previously been published, select the Flag as New Article(s) check box to make the new article icon display next to your article in the selected channels.**

Users from these channels can see that this article has been modified since the last time they read it. This check box is not available when you publish an article for the first time, as the icon displays by default then.

If the draft being published is a working copy of a currently published article, it is published as a new version of the original.

4. **Click OK.**

Articles you're publishing now move directly to the Published Articles view.



You can also schedule an article for publication at a later date. And, Service Cloud 2 has you covered in case you change your mind. You can cancel a previously scheduled publication date, too, by clicking the conveniently placed Cancel Publication link for the previously scheduled article.

Service Cloud 2's Answers feature allows service agents to ask questions to internal and/or external groups and also see various answers from the community. Community members vote on answers they like, and the original asker can deem one response as the best answer. This is similar to how Yahoo! Answers sources responses from its users, and is available in Professional, Enterprise, and Unlimited Editions.

## *Helping Customers Help Themselves*

You'd be surprised by how many customers would prefer to get the answers themselves (if they knew where to go), rather than call you. By creating a knowledge base of frequently discussed questions or issues, you can allow your customers to solve their own issues, decreasing call volume to your call centers. You can also improve your agents' response times so they don't have to constantly retype repetitive solutions, and your call center managers can track topic trends to provide feedback to product and marketing teams.

## Launching a Customer Portal

When customers have a problem, they can log in to your Customer Portal and do things such as

- ✓ Log a new case.
- ✓ Search the knowledge base.
- ✓ Get help and training.
- ✓ Interact with other customers in community forums.

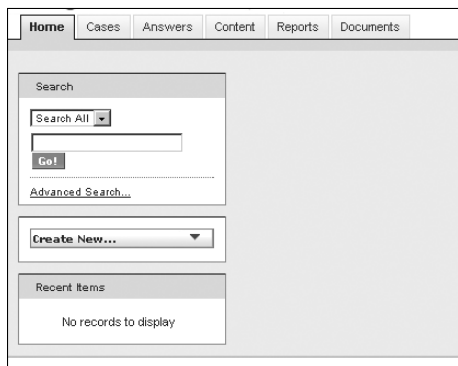


Before implementing the Customer Portal, make sure your public solutions are up to snuff. That is, your public solutions must be populated with answers to many common customer inquiries, and the articles must be well written and appropriate for public consumption.

To launch the Customer Portal, contact [salesforce.com](https://www.salesforce.com) to activate it for your organization. After activation, you see settings in the Admin Console to configure it.

See Figure 17-6 for one example of the Customer Portal from the customer's perspective. The colors and tabs of the portal may be customized by you to best match your company branding.

**Figure 17-6:**  
A  
customer's  
view of the  
Customer  
Portal.



## Managing Customer Portal users

After you thoroughly test your Customer Portal, you want to make it available to customers.

To give a customer access to your Customer Portal, take these steps:

1. **Use the sidebar search to find the Contact record for the Customer.**

**2. Click the link for the Contact record in the search results.**

The Customer's contact record page appears.

**3. Click the Work with Portal button and select the Enable Customer Portal User option from the drop-down list.****4. Change the User License and Profile if necessary.**

If you want the user to have a different license and profile than that which it defaults to, you have to change it.

**5. Make sure that the Generate New Password and Notify User Immediately check box is selected.****6. Click Save.**

## *Customizing your Customer Portal*

If your business deals with several types of customers, each requiring a customized portal interface, you can create multiple portals for them. For example, maybe your platinum customers need Portal access to report on very specific information captured in custom fields that don't apply to your regular customer base. Or maybe you're dealing with a large set of customers testing out the newest version of your product, and you need them to provide specific feedback that isn't normally captured for your current products. Additionally, you can customize the Customer Portal so it fits seamlessly with the rest of your corporate Web site's branding.

To customize your Customer Portal, do the following:

**1. Choose Setup⇨App Setup⇨Customize⇨Customer Portal⇨Settings.****2. Enter the name of your Customer Portal.****3. Set the appearance of the portal:**

*a. Click Change Portal Fonts and Colors.*

*b. Select a color theme from the Color Theme drop-down list.*

Select Custom from the Color Theme drop-down list to create your own theme from scratch. A preview of the color theme you select is automatically displayed in the Preview sections.

(Optional) To customize the color of any theme, you can either

- Enter a hexadecimal value into any theme attribute.
- Click the hexadecimal value of any theme attribute and select a color from the point-and-click editor.

When you customize a theme, it is automatically renamed Custom when saved.



**4. Click Save to save all changes to the theme values.**

Changes are visible to Customer Portal users when they refresh their browsers. Take care to update your portal color theme at times when users are least likely to visit your Customer Portal.

## *Sharing Knowledge articles with the public*

Collecting answers to increase your agents' efficiency is just the tip of the iceberg. Using that information to then efficiently address conversations in the cloud distinguishes your company from the rest. The extent of your customer service efforts will closely follow the pace of conversations, so your brand and its reputation stay current with all messaging. By making your knowledge base available to a customer, you can use the relevant information about a specific customer (like what products of yours they own) to automatically suggest articles relevant to that customer. Salesforce Knowledge can even suggest an article before the customer does a search!

Not only can customers find a quick answer, but they can also learn more about the products they use. The more often that customers can educate themselves, the more often that service agent interactions will start off at a more sophisticated level of dialog.

And if customers have feedback about some of the articles, they can vote on the information and see what others think about it. This closed-loop feedback provides valuable information to other customers and to the internal product folks that put that information there.

To enable Salesforce Knowledge in your Customer Portal, do the following:

**1. Choose Setup ⇨ Manage Users ⇨ Profiles.**

The User Profiles page appears.

**2. Click the name of one of your Customer Portal profiles.**

**3. Click the Clone button to create a copy of this profile.**

The Clone Profile page appears.

**4. Enter a name for your new profile and click Save.**

Your new profile page appears.

**5. Click the Edit button to update the new profile's permissions.**

The Profile Edit page appears, as shown in Figure 17-7.

The screenshot shows the 'New Profile' configuration page in Salesforce. At the top, the 'Name' is 'New Profile', 'User License' is 'Customer Portal Manager', and 'Custom Profile' is checked. Below this is a 'Description' field. The main section is 'Tab Settings', which includes a checkbox to 'Overwrite users' personal tab customizations' (unchecked) and a 'Required Information' indicator. It is divided into 'Standard Tab Settings' and 'Custom Tab Settings'. 'Standard Tab Settings' includes Home (Default On), Answers (Default On), Articles (Default On), Cases (Default On), Content (Default On), Documents (Default On), Ideas (Default On), Reports (Default On), Solutions (Default On), Subscriptions (Default On), and Workspaces (Default On). 'Custom Tab Settings' includes Candidates (Default On), Employment (Default On), Google AdWords (Tab Hidden), Websites (Tab Hidden), Job Applications (Default On), Positions (Default On), Start Here (Tab Hidden), VR Email (Tab Hidden), VR Postcard (Tab Hidden), and VR Statistics (Tab Hidden). Below 'Tab Settings' is the 'Administrative Permissions' section with checkboxes for API Enabled (checked), Password Never Expires (unchecked), Delegated Portal User Administrator (unchecked), Portal Super User (unchecked), IP Restrict Requests (unchecked), and Send Outbound Messages (checked). The 'General User Permissions' section includes checkboxes for Create Workspaces (unchecked), Show Custom Sidebar On All Pages (unchecked), Export Reports (unchecked), View Articles (checked), Run Reports (unchecked), and View Content in Portals (checked).

**Figure 17-7:**  
Editing a  
Customer  
Portal  
profile.

**6. Verify that the tab visibility for the Articles tab is Default On and that the View Articles check box is selected.**

**7. Click Save to finish updating your Customer Portal Profile.**

**8. Choose Setup⇨App Setup⇨Customer Portal⇨Settings to return to the Customer Portal Setup page.**

**9. Select the name of your Customer Portal.**

The Customer Portal detail page appears.

**10. At the bottom of the Customer Portal detail page, click the Edit Profiles button.**

A list of available profiles is displayed.

**11. Place a check in the check box for your new profile and click Save.**

Your Customer Portal detail page reappears.

**12. Click the Customize Portal Tabs button.**

The Portal Tab Set Editor page appears.

**13. Highlight the Articles option in the Available Tabs list box and click the right arrow to move it to the Selected Tabs list box.**

You can also move any other Salesforce tabs you want to include in your Customer Portal.

**14. When finished, click the Save button.**

Your Customer Portal detail page reappears.



Notify support agents who create articles that they must select Customer Portal as a channel option when creating or modifying an article. If the Customer Portal channel isn't selected, the article will not appear in the portal.

**15. Add the Article Search component to the home page layout to allow customers to search for articles from the Home tab.**

## *Improving Agent Productivity*

For those of you who operate a support center in which you handle a high volume of support issues, you probably want to make your agents' time as productive as possible. What information can you put at their fingertips to help them resolve that case that much faster? In the following sections, we review a timesaving option that may be a good fit for your team.

### *Using the Console*

High-volume call center agents need access to a lot of information at once. Typing fewer keystrokes means that resolving a customer's issue takes less time. From a single Web page, the Salesforce Console allows an agent to view all of his cases, handle a single case, and see all the records — including accounts, contacts, and opportunities — that relate to a case. The Salesforce Console provides an interface within a tab in Salesforce, designed to be a one-stop desktop for your agents.

### *Setting up the Console*

We highlight the basic steps you need to take to get the Salesforce Console up and running in the following sections. Try to walk through a scenario in which an agent handles a new case and sees it to closure from within that Console. Check out the Help & Training section in Salesforce, under Console, for more details on the following summaries.

**1. Create your Console layouts.**

Choose Setup⇨App Setup⇨Console⇨Console Layouts to create a new layout that defines which objects your agents will see in the console.

See Chapter 21 for more information on layouts and assignment rules.



2. Customize your mini-view.

*Mini-views* are summary previews of a record that you can see when you hover your mouse over the record name. Before you tell Salesforce what fields in a record to include in your mini-view, do the following:

- a. Choose those objects.
  - b. Define their layouts — that is, assign which fields appear where in the preview.
  - c. Assign user profiles to console layouts so the right Salesforce users in your organization can see what they need to see in the console.
3. Add the Console tab.

This final step adds the tab to your users' view. Decide which set of apps in your App drop-down list will contain this tab.

## *Providing customer service from anywhere*

Service Cloud provides two options for managing calls from your customers. The first option is already set up and seems obvious. You define some basic roles and rules for levels of support in your call center. When a person calls in, the agent searches for the contact, validates the caller against information in the Service Cloud, and captures the case in real time. Then, hopefully, the agent resolves the case in the same call.

The second option is to integrate your telephony environment with the Service Cloud to make managing customer calls easier for agents and customers.

Additionally, agents can provide customer service when they're not in an office. You can distribute your contact center across the world through the wonders of chat-based support. Service professionals constantly on the go can continue to manage multiple customers using Service Cloud mobile solutions and even look up answers to common questions from their favorite mobile device. Field technicians can view their route schedule without going into the office, and they can report issue resolutions without ever turning on a computer.

## *Using a call center*

Service Cloud telephony integration works with more than 80 of the most popular phone systems and may include interactive voice response (IVR),

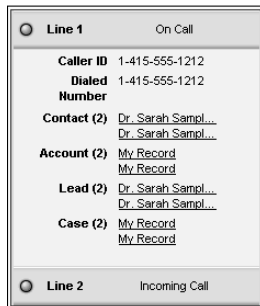


automatic call distribution (ACD), and screen pops that automatically present the caller's contact record to your agents. With an open API and the free Force.com Connect CTI Toolkit, available at <http://developer.force.com>, your technical resources can deliver an even more robust experience, which is especially valuable in higher-volume contact centers.

The integration can work with a bevy of on-demand telephony partners, such as Angel.com, Five9, inContact, and LiveOps, or with on-premise solutions from leading telephony providers including Avaya, Cisco, Genesys, Nortel, and more.

These providers provide pre-built integrations from their telephony systems to salesforce.com, allowing the agent desktop to be shown right inside the salesforce.com user interface (see Figure 17-8).

**Figure 17-8:**  
Taking calls from within the salesforce.com user interface.



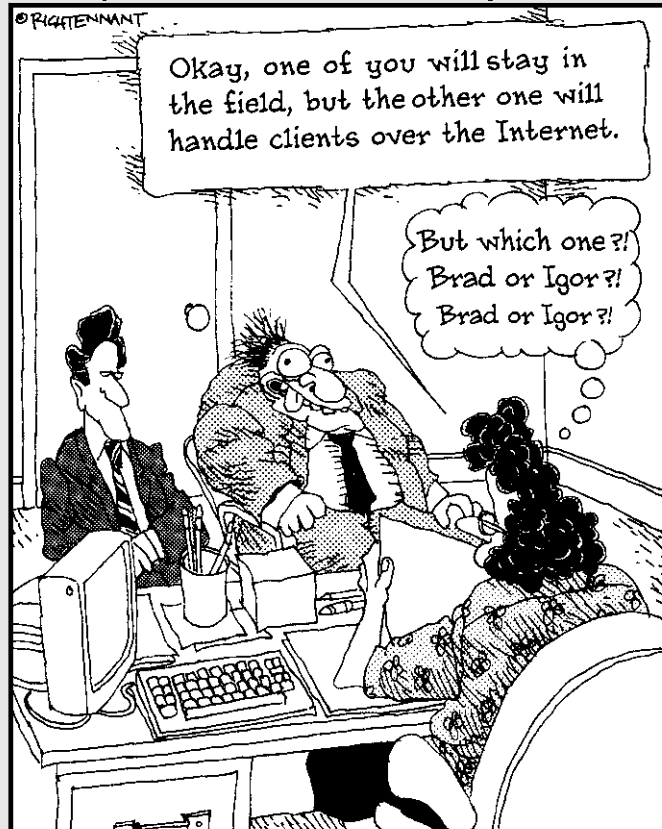


# Part VI

# Measuring Overall Business Performance

The 5th Wave

By Rich Tennant



## *In this part . . .*

**Y**ou stand a better chance of achieving and surpassing your sales and customer support goals if you know exactly where you are and how fast you're going. By using reports and dashboards in Salesforce, you can get real-time insight into your sales and support teams, marketing efforts, customers, and overall business. Manual reporting will be a thing of the past. Sound too good to be true? It's not. As long as you and other users are updating records in Salesforce, the data is at your fingertips.

In this part, we explain everything you need to know about reports and dashboards. We show you how to use the standard reports and create your own custom ones by using the Salesforce Report Builder or the classic report wizard. If for some reason you still need to work with your data in spreadsheets, we show you just how simple it is to export your data into Excel. And you discover how to build powerful dashboards to visually depict key parts of your business.

## Chapter 18

# Analyzing Data with Reports

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### *In This Chapter*

- ▶ Defining reports
  - ▶ Creating reports using Report Builder and the traditional method
  - ▶ Exporting to Excel
  - ▶ Organizing your reports
- 

**H**ow much time do you waste every week trying to prepare reports for your manager, your team, or yourself? You have to chase down the information, get it into a useful format, and then hopefully make sense of the data. By the time you do all that, the information is probably already outdated, despite your best efforts. Have you ever felt less than confident of the details or the totals?

If this sounds like a familiar problem, you can use reports in Salesforce to generate up-to-the-moment data analysis to help you measure your business. As long as you and your teams regularly use Salesforce to manage your accounts, opportunities, and other customer-related information, you don't have to waste time wondering where to find the data and how to consolidate it. Instead, let Salesforce do that work for you.

And unlike other applications in which the business users often have to spend precious time relying on more-technical people to build their custom reports, you can do this all by yourself in minutes, with no geeky programming. With an easy-to-use reporting wizard, you can customize existing reports or build them from scratch.

This chapter includes an overview of the standard reports provided by Salesforce, building reports from scratch, and modifying existing reports to make them your own. Within a report, we take you through the different ways you can limit the report to get just the information that's necessary for creating a clearer picture of your business. Finally, be sure to check out our suggestions on how to keep your reports organized in easy-to-find folders as your universe of reports expands.

## Discovering Reports

With reports, you can present your data in different formats, select a seemingly infinite number of columns, filter your data, subtotal information, use color to highlight when certain conditions are met, and embed formulas, just to name a few features. And like other pages in Salesforce, you can quickly find the details. So, for example, you can go from the Reports home page to a lead report to a lead record simply by clicking links.

### Navigating the Reports home page

When you click the Reports tab, as shown in Figure 18-1, you'll see a search bar, a Report Folders drop-down list, a subtab that lists all your available reports, and another subtab that shows recently run reports. Salesforce has functionality on the Reports home page to help you more easily navigate through a large set of reports. Salesforce comes standard with a set of predefined reports and folders that are commonly used for measuring sales, marketing, support, and other functions. For example, the Opportunity Pipeline report is an oft-used report by sales individuals and managers to help prioritize which deals to work on.



**Figure 18-1:**  
The Reports  
home page.



You can't save a custom report in a standard folder. If you're an administrator, consider creating custom folders using the Create New Folder link that's to the right of any custom folder drop-down list. Organize this according to your important functional areas that ultimately replace these standard folders.

From the Reports home page, you can do the following:

- ✓ **Find reports.** Type keywords into the custom reports search bar and then click Find Report to return matching reports based on the report name description fields.
- ✓ **Search a folder.** Use the Report Folders drop-down list to quickly navigate to a set of reports in a particular folder (not available with Group Edition).
- ✓ **Create a folder.** If you're an administrator, click the Create New Folder link to create new report folders to house custom reports.
- ✓ **Hide or show reports.** Click the Collapse All or Expand All link on the right side of the All Reports and Recent Reports subtabs to hide or show all reports in all folders.
- ✓ **Reorder folders on the page.** Click the Reorder Folders link to the right of the All Reports and Recent Reports subtabs.
- ✓ **View recent reports.** Click the Recent Reports subtab and use the drop-down list to match the criteria of what reports you want to see.
- ✓ **Display the report.** Click a report title. Either the report appears, or you see a wizard that you need to follow to generate the report.
- ✓ **Edit, delete, or export data to Excel.** On standard or custom reports, click the Edit, Del, or Export links. We talk more about exporting your reports in the later section, "Exporting Reports to Excel."
- ✓ **Create a report.** Click the Create Report with Report Builder button to start the Report Builder Wizard. Alternatively, you can use the more traditional Create New Custom Report button if you prefer the older way of creating a report.
- ✓ **Organize reports.** If you have permission to manage public reports, click the Report Manager button.

## *Displaying a report*

When you click a report title or run a report from the wizard, a report page appears based on the criteria that was set. For example, under the Opportunity

Reports folder, click the Opportunity Pipeline link. The Opportunity Pipeline report appears, as shown in Figure 18-2. This report, as we mentioned earlier, is one of the most-used standard reports in Salesforce.

Owner Role	Opportunity Owner	Account Name	Opportunity Name	Fiscal Period	Probability (%)	Age	Close Date	Created Date	Next Step	Lead Source	Type	Amount	Expected Revenue
Stage: Prospecting (1 record)													
CEO	Liz.Kiao	Pyramid Construction Inc.	Pyramid Emergency Generators	Q3-2007	10%	90	3/27/2008	4/16/2010	-	Phone Inquiry	-	\$100,000.00	\$10,000.00
Stage: Qualification (1 record)													
CEO	Liz.Kiao	Dickenson, LLC	Dickenson Mobile Generators	Q3-2007	10%	90	3/27/2008	4/16/2010	-	Purchased List	New Customer	\$15,000.00	\$1,500.00

**Figure 18-2:**  
Displaying  
a report.

A basic report page in Salesforce is broken up into two or three parts:

- ✓ **Org Drill Down:** You can use this area at the top of the page to quickly limit results based on role hierarchy. See Chapter 20 for steps on setting up the role hierarchy.
- ✓ **Report Options:** This section is at the top of the page, just below the Org Drill Down. You can use it to filter and perform other operations on a report. For details on report options, see the section “Filtering on a Report,” later in this chapter.
- ✓ **Generated Report:** This section shows the report itself. What’s visible depends on the construction of the report and what you have permission to see in Salesforce. See Chapter 20 for more details on sharing.



In the Generated Report section, you can click a column heading to quickly resort your report by the selected column.

## Developing Reports

Salesforce comes with a huge menu of useful reports, and yet they might not be exactly what you’re looking for. For example, if your company has added custom fields on the account record that are unique to your customer, a standard New Accounts report doesn’t show you all the information you want to see on recent accounts.



The next time you need a custom report, don't pester the IT geeks. Instead, use Report Builder to build a new report or customize an existing one.

## *Building a new report with Report Builder*

You don't have to be a technical guru to create a report in Salesforce. Just make sure you can articulate a question that you're trying to answer, and then Report Builder will guide you through the steps for creating a custom report that will help you answer the question. Anyone who can view the Reports tab can create a custom report.

To create a report from scratch, click the Reports tab and follow these steps:

**1. Click the Create Report with Report Builder button.**

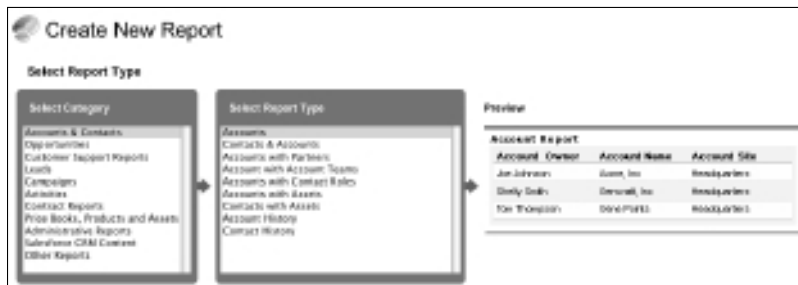
The Create New Report page appears, as shown in Figure 18-3.

**2. Select the data type you want to report on, and then click Create.**

You do this by first selecting the basic category of data from the first box and then being more specific in the dependent list box.

When you click Create, the Report Builder drag-and-drop interface appears.

**Figure 18-3:**  
Defining the  
data type for  
the report.



**3. Customize your report using the following Report Builder features:**

- *Adjust your view and timeframe.* Do you want to see just records that you own, ones that you and your underlings own, or all records that your role is able to see? What duration do you want the report to cover? Use the picklists in the View and Time Frame section to narrow down your results.
- *Edit custom filters.* To help further narrow your result set, use the Edit Custom Filters button. For example, you can create a custom

filter to only show results where the opportunity amount is greater than \$10,000.

- *Drag and drop files.* Find fields in the left sidebar that may be additional columns that you want in your report. Simply click and drag that field name over to the Preview section of the Report Builder, and then place that new column among your other headers.
- *Add a chart.* Look for an optional Add Chart button in the Preview pane to add a graphical summary of your results. Use the Chart Editor to choose a chart type, determine what data to represent, and decide how you want that data visually presented.

**4. When you're done creating your report, click the Save button.**

The report saves, and a sample preview appears in the Report Builder Preview pane.

Report Builder, as of this printing, only works with tabular and summary reports: not yet with matrix reports.



## *Building a report from scratch*

To create a report from scratch, click the Reports tab and follow these steps:

**1. Click the Create New Custom Report button.**

The Report Wizard appears.

**2. Select the data type you want to report on, and then click Next.**

You do this by first selecting the basic type of data from the drop-down list and then being more specific in the dependent list box. When you click Next, Step 1 of the wizard appears.

**3. Select the radio button for the type of report that you want.**

You have three options:

- *Tabular Reports* provide the most basic way to look at your data in a tabular format.
- *Summary Reports* allow you to view your data with subtotals and other summary information.
- *Matrix Reports* enable you to create reports in grids against both horizontal and vertical categories. This type of report is particularly helpful for comparing related totals, especially if you're trying to summarize large amounts of data.

**4. When you're done, select the Select Columns option from the Jump to Step drop-down list in the top-right corner.**

The Select the Report Columns page appears.



The report type that you select dictates how many of the seven possible Report Wizard steps you see and the order that they're presented in the wizard. And at any time, you can use the Jump to Step drop-down list to skip around the wizard.

**5. Select the check boxes for the columns that you want in your report.**

Depending on the data type you chose, the Select the Report Columns page displays standard and then custom fields divided into sections.

**6. When you're done, select the Select Columns to Total option from the Jump to Step drop-down list.**

A wizard page appears with the columns that can be totaled (such as currencies, amounts, and percentages) based on the columns you selected in Step 5 of this list.

**7. Select check boxes for columns that you want summarized and how you want them summarized.**

Salesforce provides you options for summing, averaging, and choosing highest or lowest values. For example, on an opportunity report, you could use averaging to measure the average amount of an opportunity.

**8. When you're done, select the Order Columns option from the Jump to Step drop-down list.**

The wizard page appears.

**9. Click the directional arrows to order the columns.**

This is how columns will appear on the report, from left to right, if you're showing all details.

**10. When you're done, select the Select Criteria option from the Jump to Step drop-down list.**

The wizard page appears.

**11. Use the criteria filters to limit results on your report.**

The standard filters will vary based on the data type you chose. For advanced filters, select fields and operators by using the drop-down lists, and then enter values, similar to creating custom views.



With advanced And/Or filters, you can create precise reports that might include complex conditions. For example, if you define strategic accounts as companies that did either more than \$1 billion in annual revenue or had more than 500 employees plus \$500 million in annual revenue, you can now generate this report. To do this, enter your advanced filters as before, and then click the Advanced Options link at the bottom of the Advanced Filters section. When the page reappears, click the Tips link located next to the Advanced Filter Conditions field. Modify your Conditions as recommended before clicking the Run Report button. (You must have Professional, Enterprise, or Unlimited Edition.)

- 12. When you're done, select the Select Groupings option from the Jump to Step drop-down list.**

The wizard page appears.

- 13. Select the columns by which your report will be grouped.**

For example, if you want to measure the number of opportunities owned by rep and subtotaled by close month, use an opportunity summary report. First sort by Opportunity Owner, and then by Close Month.

- 14. When you're done, select the Select Chart & Highlights option from the Jump to Step drop-down list.**

The wizard page appears.

- 15. Complete the fields to build a chart, and then click the Run Report button.**

Many users include this step if they need to generate a specific chart or graph, or use colors to highlight certain conditions to support the report. (See the section "Adding conditional highlighting," later in this chapter, and see Chapter 19 for more details on using color and building charts in dashboards or reports.) When you click the Run Report button, the actual report data displays under the Generated Report heading.

- 16. If you want to save the report, click the Save As button.**

A Save Report page appears.

- 17. Complete the fields and click the Save button.**

You'll need to name your report and tell Salesforce what folder you want it in. Here are pointers for completing the fields:

- *Report title:* Enter a title for the report in the Report Name field.
- *Purpose hint:* Type a question or sentence in the Report Description field that will help you remember the purpose of the report.
- *Folder location:* If you have permissions to manage public folders, select a folder for the report from the Report Folder drop-down list.

After clicking the Save button, the Reports home page appears with a link to the report under the selected folder. Optionally, you can click the Save & Return to Report button to save and go back to working with your report.

## *Customizing existing reports*

A fast and easy way to generate reports is to customize an existing report. For example, if you like the standard Pipeline Report but you want to modify the columns, you can simply work from the existing report.



## Creating custom report types

The Report Wizard is pretty darn thorough. At the same time, your company's quant jocks may want to perform even more advanced reporting than what's offered in the standard Report Wizard. Or you may want to simplify the number of fields that your report users see when they go through the wizard. Professional, Enterprise, and Unlimited Edition administrators can create custom report types (CRTs) to address both of these needs.

For more advanced reporting capabilities, in techno-speak, CRTs let you change the joins on the table. So if you have a Projects object and want to report on all accounts with projects and project team members, you can create a CRT and determine which fields show up in your Select Columns to Total step. For more information on setting up CRTs, go to the Help section within Salesforce and search for Setting Up Custom Report Types.

To customize an existing report, go to the Reports tab and follow these steps:

**1. Click a link for an existing report.**

The report appears.

**2. Click the Customize or Customize with Report Builder button.**

Using the Customize button, a page from the Report Wizard appears. If you use the Customize with Report Builder button, you go to the drag and drop interface for that report (discussed in the previous section, "Building a new report with Report Builder").

**3. Based on what you want to customize, select a step from the Jump to Step drop-down list.**

The wizard page appears based on what you selected.

**4. Modify the fields within that step to customize your report.**

For example, if you want an opportunity report with only forecasted opportunities, select the Select Criteria option from the Jump to Step drop-down list. Then add an advanced filter, such as Forecast Category Equals Commit. (Forecast Category is the field, Equals is the operator, and Commit is the value.)

**5. Continue jumping to steps until you're satisfied, and then click the Run Report button.**

The report appears modified based on your settings from the wizard.

**6. When you're done, click Save or Save As.**

The Save button replaces the prior custom report. The Save As button saves a new one. In either case, a page appears, to save the report.

**7. Complete the fields and click Save.**

The Reports home page appears, with a link to your new report.

## *Building custom summary formulas*

Salesforce provides pre-built functionality that calculates the sum, average, highest value, and lowest value of certain fields you select for your reports. However, you may need additional summary information based on calculations unique to your business. For example, your business may want to see win-rate percentages or coverage ratios on your reports. Salesforce allows the addition of custom formula calculations for your reports (and dashboards). This means you can take summary information from other fields and mash them together to come up with a new calculation and corresponding result. It doesn't matter if you know old math or new math, Salesforce can derive these values for you using Excel-like commands.

To create a new custom summary formula, follow these steps:

**1. Click a link for an existing report.**

The report appears.

**2. Click the Customize button.**

A page from the Report Wizard appears.

**3. Select the Select Columns to Total value from the Jump to Step drop-down list.**

The wizard page appears.

**4. Scrolling down the page, click New in the Custom Summary Formulas section.**

A pop-up window showing the Formula Builder page appears.

**5. Complete the fields, as required:**

- *Enter a unique name* as it'll appear on the report in the Label field. Optionally, type a description. Ideally, this field helps explain the math formula in regular-person terms.
- *Select the type of format you want* your results to be in from the Format drop-down list. For example, if you want to calculate the revenue per item of all your products in the pipeline this year, you'll want your result to be Currency.
- *Select the number of decimal places* to display for your selected data type from the Decimal Places drop-down list.

**6. Build your formula in the Formula section, as shown in Figure 18-4:**

- a. *Select one of the fields listed in the Select Field drop-down list.*

This field's value is used in your formula. In our example, we select Amount.

*b. Select the kind of summary type to use in your formula.*

You've seen these before in the standard summary section of your Report Wizard: sum, average, highest value, and lowest value.

*c. Click Insert.*

Salesforce enters the corresponding part of the formula into the formula box.

*d. Click the appropriate operator icons to the right.*

In our example, we select the / button.

*e. Repeat these steps, as needed, to build your formula.*

**Figure 18-4:**  
Building  
your custom  
formula for  
your report.

**7. Click Validate Syntax to check your formula.**

Syntax that contains errors is automatically highlighted.

**8. Click Done when finished.**

The pop-up window closes, and you're back at the Report Wizard.



9. (Optional) Clear the Display check box for this summary if you want to associate it with the report but not display it.

The custom summary formula isn't saved until you save the report. Clicking Done just includes it in this step of the Report Wizard. Make sure you save the report.

10. Save the report, and then click the report name to run it to verify that you see the new column showing your custom summary formula.



To see all the different types of operators and functions available for use with custom summary formulas, go to the Help link and search for Operators and Functions in the Help section. You'll find a comprehensive list of what you can use, with descriptions for each.

## *Adding conditional highlighting*

You can apply conditional highlighting to summarize matrix reports and help you easily highlight values that might deserve more of your attention. You can use this with custom summary formulas to highlight high or low percentages, averages, and ratios. There are a lot of syllables in this feature, but what conditional highlighting translates into is setting thresholds for certain key numerical values and color-coding them to show when a threshold has been surpassed (or not).

To use conditional highlighting on a summary report, follow these steps:

1. **Click a link for an existing report.**

The report appears.

2. **Click the Customize button.**

A page from the Report Wizard appears.

3. **Select the Select Chart & Highlights option from the Jump to Step drop-down list.**

The wizard page appears.

4. **Scroll to the Conditional Highlighting section at the bottom of the page and choose up to three summaries in the drop-down list to highlight.**

In our example, we'd like to highlight any extraordinary pipeline that a sales rep is carrying — perhaps that means his or her territory is a bit plump and needs to be better split up. We select Sum of Amount, as shown in Figure 18-5.

5. **Enter a Low Breakpoint value, a High Breakpoint value, or both.**

Thus, if the summary value is higher than your high breakpoint value, it'll be highlighted in the high color, which defaults to green. If the summary value is lower than your low breakpoint value, it'll be highlighted



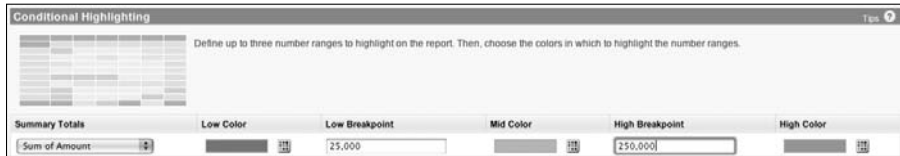


in the low color, which defaults to red. Any value in between will be highlighted in dark yellow.

If you wish to change the colors, click the Choose a Color icon next to any of the color bars.

If you don't want a certain range to be highlighted with a color, click the Choose a Color icon for that range and select the white color.

**Figure 18-5:**  
Selecting  
summary  
totals.



**6. Click Save to save the report.**

The wizard page appears.

**7. Run the report to verify that the highlighting is in effect.**

In our example, we can quickly tell one rep is faring a bit worse than the other with the red and green highlighting, as shown in Figure 18-6.

**Figure 18-6:**  
Highlighting  
summary  
values.

Opportunity Name	Type	Amount
<input type="checkbox"/> Stage: Prospecting (1 record)		\$100,000.00
Pyramid Emergency Generators	-	\$100,000.00
<input type="checkbox"/> Stage: Qualification (1 record)		\$15,000.00
Dickenson Mobile Generators	New Customer	\$15,000.00
<input type="checkbox"/> Stage: Needs Analysis (1 record)		\$675,000.00
United Oil Plant Standby Generators	Existing Customer - Upgrade	\$675,000.00
<input type="checkbox"/> Stage: Value Proposition (2 records)		\$180,000.00
Grand Hotels Guest Portable Generators	Existing Customer - Upgrade	\$100,000.00
Express Logistics Portable Truck Generators	Existing Customer - Upgrade	\$80,000.00
<input type="checkbox"/> Stage: Id. Decision Makers (3 records)		\$110,000.00
GenePoint Lab Generators	-	\$60,000.00
Edge Emergency Generator	Existing Customer - Replacement	\$35,000.00
Grand Hotels Kitchen Generator	Existing Customer - Upgrade	\$15,000.00
<input type="checkbox"/> Stage: Perception Analysis (1 record)		\$120,000.00
Express Logistics SLA	Existing Customer - Upgrade	\$120,000.00
<input type="checkbox"/> Stage: Proposal/Price Quote (2 records)		\$370,000.00
University of AZ Installations	Existing Customer - Upgrade	\$100,000.00
United Oil Refinery Generators	Existing Customer - Upgrade	\$270,000.00
<input type="checkbox"/> Stage: Negotiation/Review (2 records)		\$395,000.00
United Oil Office Portable Generators	Existing Customer - Upgrade	\$125,000.00
United Oil Installations	Existing Customer - Upgrade	\$270,000.00

## Filtering on a Report

Over time, you'll develop core reports that have the columns that you want in a format that makes sense to you. One of the huge benefits of reporting in Salesforce is that you can use existing reports on the fly and apply report options to limit or reorder the report results.

All those options and more are possible in seconds without having to use the Customize button. In the following sections, we show you how to filter your reports with tools and enhanced drill-down and break-out options.

### *Using the Report Options section*

When you open a report, it appears with a variety of filters in the Report Options section at the top of the page. By using the filters in the Report Options section, you can look at your data from multiple angles. The available standard filters depend on the type of report that you selected.

To try out the standard filters in the Report Options section by using the Opportunity Pipeline report as an example, first go to the Reports home page and click the Opportunity Pipeline link. The report appears. From the report, you can do the following with the filters in the Report Options section:

- ✔ **Summarize your report by a field.** From the Summarize Information By drop-down list, select a field that determines how your information is summarized. For example, if you want to look at your opportunities by rep, select Opportunity Owner.
- ✔ **Choose a range.** From the Interval drop-down list, first select a date field, and then in the drop-down list to the right, select a standard interval or create a custom range. For example, if you want to look at all opportunities created from 2006 to the present, you'd first select Created Date, and then define the interval.
- ✔ **Choose a scope.** From the View drop-down list, select the scope of records.
- ✔ **Look at open or closed records.** Use the Opportunity Status drop-down list if you want open and/or closed records.
- ✔ **Limit results.** Use the Probability drop-down list if you want to limit the results by probability.

At any particular time, click the Run Report button to apply your selected filters. The report reappears based on the filters you defined.

If you ultimately want to save the report, click the Save or Save As button, and then save the report as usual. (See the section "Building a report from scratch," earlier in this chapter, for details on saving.)

## *Hiding and showing details*

To see a collapsed or expanded view of your report data, click the Hide/Show Details button in the Report Options section. For example, from the Reports home page, click the Sales by Account report under Sales Reports. When the report appears, click the Hide Details button. The report reappears in a collapsed view, and the Hide Details button morphs into the Show Details button. Now click the Show Details button, and the report expands again. By using Hide Details, you can easily view headings, subtotals, and totals, especially for matrix reports.

## *Filtering with the drill-down menu*

Reports in Salesforce have a drill-down function that you can use to select rows within a report and instantly break them down by a different field. For example, if you're reviewing an Opportunity by Rep report, you might want to select a specific rep and then sort the rep's opportunities by stage. With enhanced drill-down and break-out options, you can do this in just a few quick clicks.

To use the drill-down and break-out options (using Sales by Rep as the example), follow these steps:

- 1. From the Reports home page, click the Sales by Rep link under the Sales Reports folder.**

The report appears.

- 2. In the left column of the Generated Report section, select check boxes for records you want to view.**

If you don't see check boxes and you know you've closed opportunities in Salesforce, select an interval in the Report Options section to see all your historical opportunities and click Run Report to view more records.

- 3. At the bottom of the page, select a field from the Drill Down By drop-down list to summarize the information, if desired, and then click the Drill Down button.**

The report reappears based on your selections. For example, if you chose the Close Month option from the Drill Down By drop-down list, your selected opportunities would be sorted by close month.

- 4. If you want to use the report in the future, click Save As, and then follow the normal directions for saving reports.**

See the section "Building a report from scratch," earlier in this chapter, for saving details.

## Clearing filters

If you have reports with advanced filters, you can easily view and clear the filters to expand the results. For example, if you created and saved the test report in the preceding section, you might want to clear the filter on the selected rep(s) to see all closed opportunities by close month for all reps. The advanced filters, if any, appear just below the Generated Report header on a report page.

To clear a filter, follow these steps:

- 1. Click the link for a report to which you applied filters.**

The report appears, and your criteria filters are listed under the Filtered By header directly below the Generated Report header.

- 2. Right below the Filtered By header, click the Clear link to remove a filter.**

The report reappears, displaying a potentially wider universe of data.

- 3. Be sure to click the Save or Save As buttons if you want to save this report.**



You can quickly modify advanced filters by clicking the Edit link next to the Filtered By header. The Select Criteria page of the Report Wizard appears.

## Exporting Reports to Excel

Ideally, you want to run your reports right out of the application, getting rid of that mad scramble of collecting data before your next big meeting. However, sometimes you'll want to generate a report and then export it to Excel. Maybe you need to run some complex spreadsheet calculations, or you need to plug numbers into an existing macro template. No problem. You can do that with the click of a button.

To export a report, click the Reports tab and follow these steps:

- 1. Click the link to a report.**

The report appears. You can bypass this step if you see an Export link next to a report title on the Reports home page.

- 2. Click the Export Details button.**

A page appears to define your settings for exporting the file.

- 3. Complete the fields and click the Export button.**

A window appears, prompting you to open or save the file.

**4. Follow the steps, as desired.**

When the file opens, the report data appears in Excel.

**5. Click Done to return to your Salesforce report.**

The report page reappears.



Some companies get nervous about certain users having the ability to export company data. If this is a concern, and you have Enterprise or Unlimited Edition, you can take one precaution by using custom profiles to eliminate the ability of some users to export to Excel. See Chapter 20 for more details on creating custom profiles.

## Organizing Your Reports

A word to the wise: Reports start multiplying like rabbits as you become addicted to reporting in Salesforce. Do yourself a favor: Organize them from day one and lay out a process for maintaining and deleting reports.

### Creating new folders

Nothing is worse than seeing a kazillion reports under the Unfiled Public Reports folder. You start wasting a ridiculous amount of time just identifying which one is the report you want. If you have permission to manage public folders, avoid the headache by creating new report folders.

To create a new report folder, click the Reports tab and follow these steps:

**1. Click the Create New Folder link to the right of the Folder View drop-down list.**

A New Report Folder page appears.

**2. Type a name for the folder in the Report Folder field.**

For example, if you want a folder for operational reports, you might name it Sales Ops Reports.

**3. Use the Public Folder Access drop-down list to determine read versus read/write privileges to the folder.**

For example, if you select Read/Write, a user with access to the folder could save over the original report.

**4. Use the two list boxes and the Add/Remove buttons to select reports in the Unfiled Public Reports folder and move them to the new folder.**

**5. Use the radio buttons to select who should have access to the folder.**

As with other Salesforce folder tools, your choices amount to all, none, and selective.

**6. If you chose the Selective option in Step 5, use the two list boxes and Add/Remove buttons to highlight groups or roles and move them to the Shared To list box.**

**7. When you're done, click Save.**

The Reports home page reappears, and your folder is added to the Folder menu.

## *Maintaining your report library*

Actually, what's worse than a kazillion reports under Unfiled Public Reports is a universe of reports, some of which are valuable, others of which are useless. Creating public report folders is a good first step, but you might want to apply some of these additional hints on a periodic basis:

- ✔ **Accurately name your reports.** You and your users can't know what's behind a report link unless you name it clearly and precisely.
- ✔ **Consider using report numbers within your report names.** For instance, use standard file-naming conventions like 1.1 North America Pipeline. By doing this, managers can refer to report numbers so that everyone's looking at the same report.
- ✔ **Delete unnecessary reports.** If multiple people in your company have permission to manage public reports, you might want to survey them before accidentally deleting a report. Unnecessary or redundant reports just make it harder for everyone to find what they want. And in case you mistakenly delete a report (you'll find out soon enough), you have up to 30 days to rescue it from the Recycle Bin.
- ✔ **Hide folders, as necessary.** If you're an administrator, you can do this globally by clicking the Edit link next to the appropriate Folder drop-down list selection. If you're a user, you can use the little arrows on the Reports home page to hide a folder's contents.
- ✔ **Update existing reports as needs arise.** For example, if you created an Opportunity Product Report and used an advanced filter such as Product Family Equals Software, make sure that you update the report if the product family name changes. Otherwise, your reports will be off.
- ✔ **Use clear report questions.** For example, you might use the Report Question field to summarize certain filters to your report.

## Chapter 19

# Seeing the Big Picture with Dashboards

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### *In This Chapter*

- ▶ Planning your dashboard strategy
  - ▶ Creating dashboards
  - ▶ Adding and editing components
  - ▶ Organizing dashboards
- 

**D**ashboards are visual representations of custom reports that you create in Salesforce. For example, you can see data in a chart, a graph, or a gauge. You can use dashboards to illustrate key performance indicators (KPIs) and other metrics important to your business. A *metric* is simply something you want to measure (for example, sales by rep, leads by source, opportunities by partner, cases by agent, and so on).

What does this mean for you? If you're a sales or service rep, you can track your daily progress against attainment of goals. If you're a manager, you can easily see how reps stack up against each other and where you need to get involved to hit your numbers. And if you're on the executive team, you have dashboards with actionable charts and graphs for strategic decision making to improve the business.

In this chapter, we share tips on planning your metric reporting strategy, and then we show you how to create dashboards. We walk you through updating dashboard properties and components. You also discover how to organize dashboards and their related reports so that you know you're looking at the right information.

## Figuring Out Dashboards

*Dashboards* are pages in Salesforce comprising tables and charts designed to help you understand important aspects of your business, such as opportunities per territory and leads by source. Dashboards are critical to being able to assess the health of your business and spot trends early. The following sections show you some basic concepts so you can consider your strategies before you start unleashing them on your organization.

### *Breaking down basic elements*

You can build a dashboard with as many as 20 individual charts, tables, metrics, gauges, or custom components; each item is a *dashboard component*. Similar to building charts with the Report Wizard (see Chapter 18), components are based on reports that you create. In fact, you can click a component on a dashboard to make the underlying report appear. Here's a quick summary of the components available to you:

- ✓ **Horizontal bar or vertical column charts** are great when you want to depict a simple measurement with an x axis and a y axis. For example, use bar charts if you want to create a component that displays pipeline by stage. See Figure 19-1 for an example.
- ✓ **Horizontal bar or vertical column grouped charts** work well when you want to compare groups of bars with each other. For example, use grouped bar charts if you want to create a chart that displays pipeline by stage broken out for each month.
- ✓ **Horizontal bar or vertical column stacked charts** work well when you want grouping within a bar. For example, use stacked column charts if you want to create a chart that shows cases by status and then by type (such as problems versus feature requests).
- ✓ **Horizontal bar or vertical column stacked-to-100% charts** are excellent when you're more interested in percentages than amounts. If you're comparing new versus existing business, stacked-to-100% charts can help you understand what percentage of each stage was new business versus existing business.
- ✓ **Pie charts** work just like the standard bar charts, but the data is shown as a pie with the percentage and amount for each wedge; see Figure 19-1.
- ✓ **Donut charts** work just like pie charts but also show the total for the whole chart. (Goes great with coffee and morning meetings.)



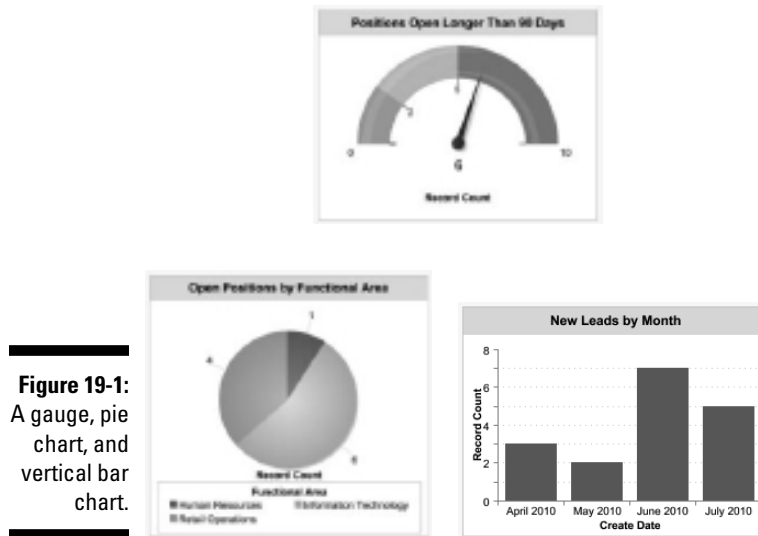
- ✔ **Funnel charts** add an additional visual element in the mix by changing the height of each grouping based on its proportion. For example, use a funnel chart if you want to easily see how much each stage in your pipeline is worth.
- ✔ **Line charts** are helpful if you're trying to express trends, particularly when time is part of the measurement. For example, use a line chart if you want to analyze the number of newly created opportunities by month for your entire company.
- ✔ **Grouped line charts** add a layer of complexity. For example, a line group chart could help you express the number of newly created opportunities by month broken out by region or unit.
- ✔ **Cumulative line charts** allow you to track progress of a single metric over time. For example, a line cumulative chart could help you see the number of closed cases by day over the course of an entire month.
- ✔ **Grouped cumulative line charts** allow you to track progress over multiple metrics over time. For example, a line grouped cumulative chart could help you see the number of closed cases grouped by agent per day over the course of an entire month.



- ✔ **Tables** create simple but powerful four-column tables. For example, use tables if you want your dashboard to show the top ten forecasted deals in the quarter in descending value.

You can create tables in dashboards but not in the charting tool of the Report Wizard.

- ✔ **Metrics** insert the grand total of a report at the end of a dashboard label that you customize. Metrics are compelling when you want to tell a story that might require a bit more explanation. Metrics tend to work well in concert with other components. For example, if you use a pie chart to summarize opportunity by stage, you could add a metric to summarize total pipeline.
- ✔ **Gauges** are useful when you have a specific measurable objective and you want to track your progress — see Figure 19-1. A gauge applies the grand total of a report as a point on a scale that you define. For example, use a gauge if you want to measure actual quarterly new bookings against a quota that you define.
- ✔ **Visualforce Pages** allow you to create your own custom dashboard components (or download other people's). Even if you're just interested in a snazzier graphic element, go to [www.appexchange.com](http://www.appexchange.com) and click the Components category to see what others have created.



**Figure 19-1:** A gauge, pie chart, and vertical bar chart.

If you're an administrator or a user with permission to manage dashboards, you can create, edit, and organize them. And even if you don't have such permissions, you can still view them by clicking the Dashboards tab on the Home page.

## Planning useful dashboards

We always say that the best way to build a system is to envision what you want to ultimately measure. Do you want to know who your top sales reps are? Would you like to understand what your best accounts are buying from you and how much? Do you wonder how long it takes to close a case? This method of starting with the business questions you want to answer applies to your building of reports and is true of dashboards. If you're an administrator or part of the team responsible for deploying Salesforce, consider these tips as you develop your dashboards:

- ✔ **Focus on your end users.** Meet with sales, marketing, and support management and have them define their KPIs for their teams and business. Knowing this helps you customize Salesforce and construct useful dashboards.
- ✔ **Create a common set of components to reflect a universal way to look at business health.** This is especially true if your company has multiple sales teams. For example, after you determine the key sales metrics for your company's overall dashboard, you can replicate the dashboard and then customize other dashboards for each sales team. By doing this, everyone in the company is speaking a common language.

## Building Dashboards

To build a dashboard, you need to create your custom reports first. You also need to create public folders for your dashboard reports if you want dashboards to be viewable for other users. See Chapter 18 for all the details on creating custom reports and organizing them in folders.



Only system administrators and users with permission to manage dashboards can add, edit, and delete dashboards. See Chapter 20 for details on how to grant permissions.

In the following sections, we show you how to create a sample dashboard and then how to clone a dashboard. Then, we cover the steps to build a dashboard from scratch.

### *Generating a sample dashboard and report*

One of the best ways to get your feet wet with dashboards is to generate a sample dashboard. Salesforce not only creates the dashboard for you, but also builds the underlying sample reports to generate the components.

To generate a sample dashboard, follow these steps:

**1. Click the Dashboards tab.**

Either the last dashboard that you viewed or an introduction page appears. If this is your first visit to the Dashboards tab, the most recently created dashboard appears.

If you're having trouble accessing dashboards, you might not have the proper permissions. In this circumstance, consult with your administrator.

**2. Click the Go to Dashboard List link at the top-left of the dashboard page.**

A folder list page appears.

**3. Click the Add Sample Dashboard button.**

The list page reappears with a link to a sample dashboard entitled Company Performance Dashboard.

**4. Click the Company Performance Dashboard link.**

The dashboard appears, as shown in the example in Figure 19-2.

**5. To open an underlying report, click the Closed Sales to Date gauge.**

A sample report appears, entitled Closed Sales. Click the Back button on your browser to return to the dashboard.





**Figure 19-2:**  
Start by  
examining  
a sample  
dashboard.

## Cloning a dashboard

To save time or repurpose useful features, you can generate a dashboard by cloning an existing one and then modifying it. For example, if you envision creating multiple dashboards for different sales units with common components, you can use this shortcut and then modify the associated reports.



When you clone a dashboard, you don't clone another set of identical reports. Instead, the newly cloned dashboard *references* the same custom reports that the original dashboard references. If you want the new dashboard to refer to different reports, see the “Editing a component” section, later in this chapter.

To clone a dashboard, follow these steps:

- 1. Click the Dashboards tab.**

A dashboard appears.

- 2. Type the name of a dashboard in the View Dashboard bar to search for a dashboard or browse and select an option from the drop-down list to select a dashboard you want to clone.**

In this example, choose the sample dashboard entitled Company Performance Dashboard.

The dashboard appears.

### 3. Click the Clone button.

The Dashboard Builder page appears, as shown in Figure 19-3.

### 4. Update any of the dashboard components as you see fit.

### 5. Click Save to leave the Dashboard Builder.

The Save Dashboard dialog box appears.

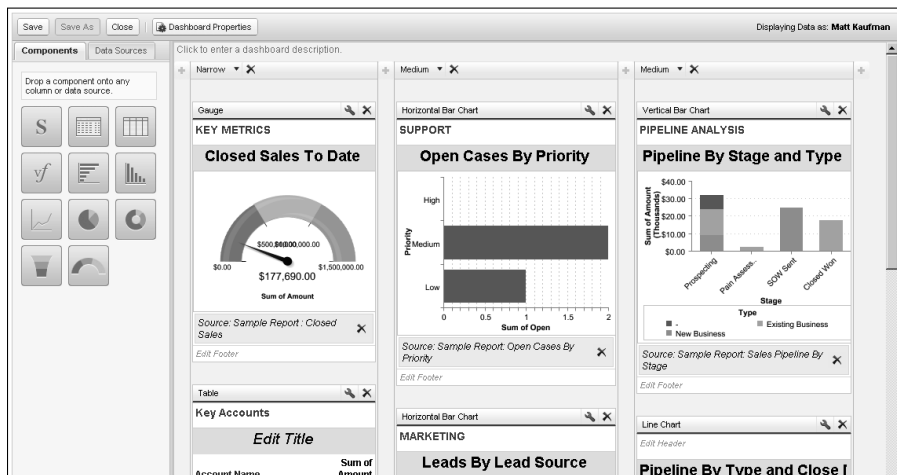
### 6. Change your new dashboard's settings, paying close attention to the following:

- *Title*: Change the title of the dashboard.
- *Dashboard Unique Name*: This field is automatically populated for you with your title, but any spaces are replaced by underscores. The Dashboard Unique Name is used by Salesforce to distinguish dashboards from a database perspective.
- *Save To*: Select the folder in which to store this dashboard from this drop-down list.
- *Running User*: The *Running User* is the user whose security settings will apply to the dashboard. So, any user who can view the dashboard will see what that Running User sees.

### 7. Click Save to view your new Dashboard.

## Developing a dashboard from scratch

In the preceding sections, you have the opportunity to test the waters and even generate some sample custom reports. In this section, you find out how to develop a dashboard from scratch.



**Figure 19-3:**  
The  
Dashboard  
Builder  
page.

To create a new dashboard, follow these steps:



**1. Click the Reports tab.**

The Reports home page appears.

You need to build your custom reports before you can develop a dash-  
ing new dashboard.

**2. Build your custom reports and save them to a public folder.**

See Chapter 18 to find out how to build custom reports.

Dashboards that you want others to see can't use reports in your My Personal Reports folder. For purposes of this running example, though, go to the My Personal Reports folder (commonly located at the top of your Reports home page) and click the following reports:

- *Sample Report: Sales Pipeline by Stage:* Modify the Report Options to summarize information by Opportunity Owner and then Stage. Then save the report as Pipe by Rep and Stage to a public folder.
- *Sample Report: Top Accounts:* Under Report Options, change Opportunity Status to Closed Won. Then, save the report as Top Revenue Customers to a public folder.



You must be an administrator or a user with permission to manage public reports if you want to add report folders.

**3. Click the Dashboard tab.**

A dashboard appears.

**4. Click the Go to Dashboard List link.**

A folder list page appears.

**5. Click the New Dashboard button.**

The Dashboard Builder page appears.

**6. Drag the horizontal bar chart component from the Components tab on the left to one of the three available dashboard columns on the right.**

A New Dashboard Component appears in Edit mode.

**7. Complete the fields, entering a header, footer, and/or title.**

For this running example, name the header **PIPELINE METRICS** and enter the title **Pipe by Rep and Stage**. You could also add a footer at the stage, but don't bother for this example.

**8. Click the Data Sources tab on the left.**

A list of reports grouped by folder appears.



- 9. Find the Pipe by Rep and Stage report you saved in Step 2 by expanding the folder you saved it in.**

You can use the plus and minus signs to expand and collapse the report folders.

- 10. Drag the report onto your dashboard component.**

A preview of your dashboard component appears.

- 11. Click Save.**

The Save Dashboard dialog box appears.

- 12. Enter a title, folder, and running user. Click Save to run the dashboard.**

Your new dashboard appears with your dashboard component.

## Updating Dashboards

Over time, you might have to make changes to your dashboards, whether for cosmetic reasons or to make substantive updates. We can come up with a dozen common edits, but the good news is that updating is easy.

### *Editing dashboard properties*

If you need to change the basic settings of a dashboard — such as the title, folder, or running user — you need to edit the dashboard properties. To edit the properties, follow these steps:

- 1. Click the Dashboards tab.**

A dashboard appears.

- 2. Select a desired dashboard from the View Dashboard drop-down list.**

The dashboard appears.

- 3. Click the Edit button at the top of the dashboard page.**

The Dashboard Builder appears.

- 4. Click the Dashboard Properties button.**

The Dashboard Properties dialog box appears.

- 5. Modify the settings, as needed, and then click OK.**

When you click OK, the Dashboard Builder reappears, and your setting changes are applied.

## *Editing a component*

You might want to add or change — *edit* — an existing component. To edit a component, follow these steps:

**1. Go to a dashboard and click the Edit button.**

The Dashboard Builder appears.

**2. Click the Wrench icon above a component that you want to modify.**

For example, you might want to change the chart type or display units.

The Component Editor dialog box appears, as shown in Figure 19-4.

**3. Modify the component data to adjust settings:**

- *For bar, column, or line charts:* From the Grouping Display drop-down list, choose a chart type to compare multiple groups of values.
- *For unit of measurement:* Use the Display Units drop-down list.
- *For metric as your component type:* Enter a Metric Label to describe the value displayed. A metric displays the grand total of a custom report following your label for that value.

**4. Click the Formatting tab to change the type and formatting of your dashboard component to best display your data.**

- *Component type:* Click a chart image to select a component type. See the earlier section “Breaking down basic elements” for details on the components. In the example, select the vertical bar chart option. The steps will differ, depending on which component type you select.
- *Table and chart components:* Use the Sort Rows By drop-down list to select the order of sorting. For example, if you want to rank the reps from biggest to smallest pipeline, choose Row Value Descending. You can also sort the row labels if you want to rank the reps by their names.
- *Maximum values displayed:* (Optional) If you want, enter a number under Maximum Values Displayed.
- *Bar, column, or line charts:* Select an option from the Axis Range drop-down list. If you select Manual, the next two fields (Chart Axis Range Minimum and Chart Axis Range Maximum) become available for input.
- *Chart labeling:* Adjust the chart labeling by selecting the Show Values and the Show Details on Hover check boxes.



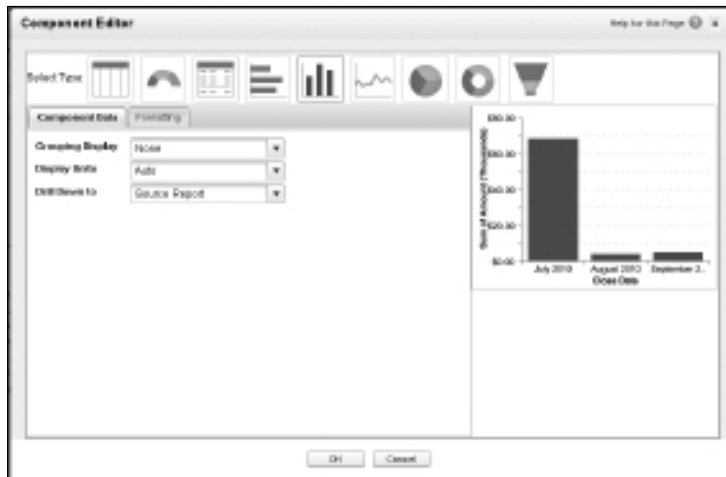
- *Tables, metrics, and gauges:* Set up to two Breakpoint Values to separate different range colors from each other. Select Range Colors to represent a range of data, separated by the breakpoint values. (See Chapter 19 for more information on conditional highlighting.)
- *Gauges:* Set your Minimum and Maximum Values to represent the lowest and highest values on the gauge.

**5. Click OK.**

The Dashboard Builder reappears with the changes you applied to the component.

**6. Click Save.**

Your changes are saved, and your dashboard reappears.



**Figure 19-4:**  
Modifying  
component  
data.

## Modifying the layout

If you need to modify the dashboard layout, you can also perform this while in the Dashboard Builder (refer to Figure 19-3).

Go to a dashboard, click the Edit button, and alter the layout. You can

- ✓ **Modify a column size.** Select Narrow, Medium, or Wide from the drop-down list at the top of each dashboard component. All the components in the column change in size based on your setting.

- ✔ **Add a component.** Drag a component or data source to a column and follow the steps in the section “Developing a dashboard from scratch,” earlier in this chapter.
- ✔ **Delete a component.** Click the X button located at the top-right corner of a component. A pop-up window appears to confirm the deletion. When you click OK, the pop-up closes, and the dashboard reappears, minus the deleted component.
- ✔ **Add a column.** If you have fewer than three columns in your dashboard, you can click the plus button at the top right or left of a column to insert a new column on that side, respectively.
- ✔ **Delete a column.** Click the X button located at the top of a column. A pop-up window appears to confirm the deletion. When you click OK, the pop-up closes, and the dashboard reappears, minus the deleted column.
- ✔ **Rearrange components.** Drag and drop components in your dashboard to arrange them exactly as you see fit.



When you're satisfied with your changes, click the Done button. The dashboard then reappears with your modifications.

You can add up to 20 components per dashboard, but best practice is to keep your dashboards simple and easy to read.

## *Refreshing the dashboard*

Before you make decisions based on your dashboard, you'll want to make sure that it is based on the latest data. Click any dashboard from your dashboard list. In the top-right corner of the dashboard is a timestamp starting with As Of. You can use this to let you know the last time your dashboard data was updated.

When you want to manually update your dashboard data, simply click the Refresh button at the top of the dashboard page. The components reappear one by one, and when the refresh is completed, a new timestamp appears.

Enterprise and Unlimited Edition customers can schedule their dashboards to be automatically refreshed on a daily, weekly, or monthly basis. Just use the drop-down list next to the Refresh button.

To schedule a dashboard to automatically refresh, follow these steps:

- 1. Click the Dashboards tab.**

A dashboard appears.

2. Click the down arrow on the Refresh button.
3. Click the Schedule Refresh option.

The Schedule Dashboard Refresh screen appears, as shown in Figure 19-5.

4. (Optional) Select the To Me and/or the To Others check boxes to e-mail a copy of the dashboard when it's refreshed.



If you have regularly scheduled meetings, you can automatically e-mail your dashboard to the meeting attendees prior to the meeting to give them a sneak peak of what will be discussed.

5. Select the frequency you want your dashboard refreshed.

Each frequency option has additional options that allow you to specify exactly when the dashboard will be refreshed.

6. Select a start and end date for the frequency you want your dashboard refreshed.

7. Select a refresh time from the Preferred Start Time drop-down list.

The dashboard reappears.

**Schedule Dashboard Refresh**
Save Cancel

This dashboard refreshes on the schedule you set. To send email when the refresh is done, use the Email Dashboard option.

Running User: Matt Kaufman (i)

Email Dashboard:  To me  To others...

Users with access to this dashboard's folder may be sent refresh email notifications.

Search: Roles ▼ for:  Find

<p style="font-size: x-small; margin: 0;">Select From</p> <div style="border: 1px solid gray; padding: 2px;"> <p style="font-size: x-small; margin: 0;">Role: Development <span style="font-size: x-small;">▼</span></p> <p style="font-size: x-small; margin: 0;">Role: Sales</p> <p style="font-size: x-small; margin: 0;">Role: Services</p> </div>	<p style="font-size: x-small; margin: 0;">Add</p> <p style="font-size: x-small; margin: 0;">▶</p> <p style="font-size: x-small; margin: 0;">◀</p> <p style="font-size: x-small; margin: 0;">Remove</p>	<p style="font-size: x-small; margin: 0;">Send Email To</p> <div style="border: 1px solid gray; padding: 2px;"> <p style="font-size: x-small; margin: 0;">Role: CEO <span style="font-size: x-small;">▼</span></p> </div>
--	--	---

Scheduled Refresh

Frequency:  Daily  Every weekday

Weekly  Every day

Monthly

Start:

End:

Preferred Start Time: [Find available options...](#)

Exact start time will depend on job queue activity.

**Figure 19-5:**  
Schedule  
a time to  
refresh your  
dashboard.

## Organizing Your Dashboards

If you have permissions to manage dashboards, manage public reports, and view all data, you can organize your company's dashboards in folders and define the proper security access for users. By organizing dashboards, you can make sure that the right people are focusing on the right metrics to manage their business.

### Viewing dashboard lists

Unlike most other tabs in Salesforce, clicking the Dashboard tab doesn't take you to its home page. Instead, the last dashboard that you viewed appears.

To access your viewable dashboards, follow these steps:

1. **Click the Go To Dashboard List link at the top-left corner of any dashboard.**

A dashboard folder list page appears.

2. **Use the Folder drop-down list to select a desired folder.**

The page for the selected folder appears with a list of available dashboards.

From this list page, users with the permissions mentioned in the preceding section can perform a variety of functions that include

- *Re-sort*: Click a column header to re-sort a dashboard list. (See Chapter 2 for more details on navigating list pages.)
- *View*: Click a title name to view a dashboard.
- *Modify*: Click the Edit link next to a dashboard to modify it.
- *Delete*: Click the Del link next to a dashboard to delete it.
- *Build*: Click the New Dashboard or Add Sample Dashboard buttons to build dashboards. (See the section "Developing a dashboard from scratch," earlier in this chapter.)



### Building dashboard folders

From a list page, you can also create and edit folders. Editing a folder is easy when you understand how to create one.

To create a folder, follow these steps:

**1. Click the Create New Folder link next to the Folder drop-down list.**

A New Dashboard Folder page appears.

**2. Type an intuitive name for the folder in the Dashboard Folder field.**

For example, if you want a folder for only senior management, you might name it Executive Dashboards.

**3. Use the Public Folder Access field to determine read versus read/write privileges to the folder.**

**4. Use the radio buttons to select who should have access to the folder.**

Your choices amount to All, None, and Selective.

**5. If you chose Selective in Step 4 (the third radio button), highlight Groups or Roles in the Available for Sharing list box and add them to the Shared To list box.**

**6. Click Save.**

The folder list page reappears, and now you can add dashboards or move existing dashboards to the new folder, which we explain in the section “Editing dashboard properties,” earlier in this chapter.



When naming folders, dashboards, and dashboard reports, consider using a standard numbering convention. For example, you could name the senior management folder 1.0 Executive Dashboards. Then the executive sales subordinate dashboard might be 1.1 and the executive marketing dashboard 1.2. By using a standard numbering methodology, you can more efficiently create, clone, and organize dashboards and dashboard reports.



# Part VII

# Designing the Solution with Force.com

The 5<sup>th</sup> Wave

By Rich Tennant



"It's your wife Mr. Dinker. Shall I have her take a seat in the closet, or do you want to schedule a meeting in the kitchen for later this afternoon?"

## *In this part . . .*

**S**alesforce is a customer relationship management (CRM) system, but it's built on top of a much more powerful platform — Force.com. With Force.com, you can create your own database applications that can sit isolated from your CRM functionality or integrate closely with it.

Using the same knowledge and skills you have acquired customizing your CRM functionality, you can quickly build new applications to streamline your business's other processes. All the built-in features of the Force.com platform including workflow, reporting, and dashboards are automatically available. Best of all, your users are already familiar with the look and feel of Force.com and can use their existing logins to access it.

In this part, you find details on customizing the Force.com platform to meet your business needs. Whether you build your own application or customize one from the AppExchange ([www.appexchange.com](http://www.appexchange.com)), this part covers all you need to know to get started.



## Chapter 20

# Fine-Tuning the Configuration

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### *In This Chapter*

- ▶ Modifying your corporate profile
  - ▶ Building the role hierarchy
  - ▶ Developing your sharing model
  - ▶ Setting up users
  - ▶ Delegating administrative duties
  - ▶ Customizing the user interface
- 

**I**n earlier chapters, you discover how to add custom fields, define picklists, and create standard templates so that Salesforce looks like it was made exactly for your business. If you're starting to think about additional ways to tweak the system so that each user sees only pertinent information, you've come to the right chapter.

For administrators or members of your customer relationship management (CRM) project team with the right privileges, Salesforce allows you to easily configure your system so that users can access and share information according to your goals. Regardless of which Salesforce edition your company has chosen, you have a variety of ways to control access and sharing of data, from system-wide sharing rules to assigning profiles. And, if you have Enterprise or Unlimited Edition, you have industrial-strength flexibility, even to the point of field-level security.

In this chapter, we show you all the steps you can take (or should consider) for configuring Salesforce, including modifying your configuration, creating the role hierarchy, assigning profiles, determining field-level security, creating users, setting up your sharing rules, and managing groups. We also show you other methods for controlling security, which include password policies, session settings, audit trails, and delegating administrative privileges.

## Figuring Out Configuration

All the things that you can change can be conveniently accessed from the Setup menu of Salesforce. If you have administrative permissions, log in to Salesforce and follow these steps:

1. **Choose Setup** → **Administration Setup**.

The Administration Setup page appears with a page title that includes the edition (or version) of Salesforce that you're using.

2. **In the sidebar, click the + buttons to expand the first three folders under Administration Setup: Manage Users, Company Profile, and Security Controls.**

These are your basic options and the first things that you should use when configuring Salesforce.

### *Breaking down basic elements*

Before jumping into the guts of system configuration, take a minute to review four basic configuration elements:

- ✓ **Users:** These are the specific people who use your Salesforce system.
- ✓ **Roles:** Define who reports to whom in your organization. For example, if you're a manager of a team of sales reps, you will have a role above your team and be able to see all the data owned by your team. Each user should have an assigned role within your defined role hierarchy.
- ✓ **Profiles:** Control a user's capability to access different fields within a record in Salesforce. For example, service reps will find some fields on an account record more relevant than other fields. To make their view of the account record less confusing, you could hide certain irrelevant fields from their view. You must assign a profile to each user.
- ✓ **Sharing model and rules:** Define the general access that users have to each other's data.

You use these four elements as the primary levers to deliver the proper level of access and control for your company in Salesforce.

## *Planning configuration to achieve success*

Put the major stakeholders of your Salesforce solution in a room and ask them one question: “How do you envision people sharing information in Salesforce?” More often than not, you’ll get blank stares.



Discuss sharing issues with your CRM project team after you hear about their current CRM processes. Current business processes, explained without any Salesforce jargon from the team, can often help you formulate an opinion based on what you believe would be best for your company. Take into consideration the culture, size, and type of sales organization at your company. Use this opinion to guide the specific nature of your questions.

Now, you *should* ask that question, but we suggest following it up with scenarios. Here are a few ideas to get you started:

- ✓ Should a telemarketer be able to see what the CEO sees?
- ✓ Should a sales rep be able to view data from other reps? Should one sales rep be allowed to edit another’s lead record?
- ✓ Do certain groups need wider access than others? For example, does a call center team that supports all customers need more or less access than a team of sales reps?
- ✓ Does a manager require different permissions than a rep?
- ✓ Do multiple people commonly work on the same account or opportunity?
- ✓ Do you have any concerns with a fully open or completely private sharing model?

Use these types of questions and their answers to guide your configuration.

## *Verifying Your Company Profile*

In your Company Profile folder, you can modify many basic settings for your organization that include default time zone, language, and currency. If you’re the administrator, you can also use this section to monitor and anticipate your future needs relative to user seats.

This is an easy but important step. If you’re an administrator beginning your implementation, get this done before you even think of adding a new user.

To update your company information, click the Setup link in the top-right corner of Salesforce and follow these steps:

**1. Choose Administration Setup → Company Profile → Company Information.**

The Company Information page appears.

**2. Click the Edit button.**

The Edit Organization Profile page appears. Review all the fields. Pay closest attention to verifying the accuracy of the three or four required fields in the Locale Settings section, as shown in Figure 20-1:

- *Default Locale:* From this drop-down list, select your company's primary geographic locale. **Note:** This setting affects the format of date and time fields (for example, 06/30/2012 versus 30/06/2012).
- *Default Language:* Set language from this drop-down list.
- *Default Time Zone:* Verify that your time zone is correctly set from this drop-down list.
- *Currency Locale:* If you use a single currency, choose the proper location from this drop-down list. This sets the corporate currency. (You won't see this field if you set up multiple currencies.)

Users can still modify their individual locale settings in the future.

**3. Click Save.**

The Company Information page reappears with any changes you made.



**Figure 20-1:**  
Update  
locale settings on the  
company  
profile.

Organization Edit	
<b>General Information</b> <span style="float: right;">Required Information</span>	
Organization Name	salesforce.com
Primary Contact	Matt Kaufman
Division	
Phone	(415) 901-7000
Fax	
<b>Address</b>	
Street	1 Market Street
City	San Francisco
State/Province	CA
Zip/Postal Code	91405
Country	US
<b>Locale Settings</b>	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT-08:00) Pacific Daylight Time (America/Los_Angeles)
Currency Locale	English (United States)
<b>salesforce.com Newsletter Settings</b>	
<input type="checkbox"/> Users receive the salesforce.com newsletter	
<input type="checkbox"/> Users receive the salesforce.com admin newsletter	
<b>Login Notifications</b>	
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

## Defining the Role Hierarchy

Think of a *role hierarchy* as the Salesforce system's data-access trickle-down org chart: If you're assigned to the role at the top of the chart, you have full access to your own data, and that privilege trickles down to the data of everyone below you in the hierarchy — and life is good.



When you're constructing your hierarchy, don't confuse your actual company org chart with the role hierarchy. Role hierarchy is all about access to data to perform your duties in Salesforce and how you want to organize certain sales-related reports. As such, hierarchies often have fewer layers than a typical org chart. For example, if your executive team will be users, you might simply create a role called Executive Team, assuming that many of those users will have similar trickle-down viewing and editing privileges.

You can use the role hierarchy in Salesforce as a primary method to control a user's visibility and access to other users' data. After you assign a role to a user, that user has owner-like access to all records owned by or shared with subordinate users in the hierarchy. For example, if you set up a hierarchy with a Sales Rep role subordinate to a Sales Manager role, users assigned to Sales Manager would have read and write access to records owned by or shared with users in the Sales Rep role.

To set up your company's role hierarchy, click the Setup link in the top-right corner and follow these steps:

**1. Choose Administration Setup ⇄ Manage Users ⇄ Roles.**

The Understanding Roles page appears, and you see a sample hierarchy.

**2. (Optional) To select a different sample hierarchy, make a selection from the View Other Sample Role Hierarchies drop-down list.**

**3. Click the Set Up Roles button.**

The Creating the Role Hierarchy page appears.

**4. (Optional) To select a different view of the hierarchy, make a selection from the drop-down list on the right side of the page.**

Salesforce provides three standard views for displaying the role hierarchy: tree, list, and sorted list. For this example, we're opting for the default, tree view.

**5. In tree view, click the Add List button.**

A Role Edit page appears for the new role.

## 6. Complete the fields.

The fields are pretty obvious, but here are some tips:

- *This Role Reports To*: Use this lookup field to define the role's place in the hierarchy. Because the lookup field is based on roles you already created, add roles by starting at the top of your hierarchy and then working your way down.
- *Contact, Opportunity, and Case Access*: Select these options that fit your company's objectives. (You may not see these fields if you have a very public sharing model — more on that in the following section.) You can provide an account owner with read/write access to related opportunities or cases that she doesn't own, has view-only access, or has no access to at all. This flexibility comes in handy in heavily regulated industries, in which you might have to prevent an account executive from knowing about certain deals or issues going on with her account.

## 7. Click the Save button or the Save & New button.

- *Save*: The Role: *Role Name* page appears, displaying the detail information you just entered and listing any users in this role. From the Users in the *Role Name* Role detail list, you may also assign existing users to this role or create new users with this role. (Check out the section “Adding Users to Salesforce,” later in this chapter.)
- *Save & New*: A New Role page appears, and you can continue building the hierarchy. Repeat Steps 3–6 until your hierarchy is done.

# Defining Your Sharing Model

As an administrator or member of your CRM project team, one of your biggest decisions in Salesforce is how users will share information. A *sharing model* controls the level of access that users have across an organization's information, not just up and down the chain. You can use the sharing model with the role hierarchy, public groups, personal groups, and the default access for each role to get pretty specific about what you want people to view or change. You use the organization-wide sharing model, and if necessary, public groups and expanded sharing rules in Salesforce to configure your sharing model.



When in doubt, start with an open, collaborative sharing model, as opposed to a secretive sharing model in which no one knows what anyone else is doing. (A secretive sharing model sounds like any oxymoron, right? Well it can be because if you don't carefully think about ramifications, you could be back to where you started with giant heaps of information.) If collaboration is one of your goals, a more-restrictive sharing model can have a greater potential negative

impact on end user adoption. You can always change the sharing model in the future if people scream loudly enough. But nine times out of ten, the value of collaboration overcomes the initial concerns with users viewing other users' data.

## Setting organization-wide defaults

The organization-wide defaults set the default sharing access that users have to each other's data. Sharing access determines how data created by users in a certain role or public group are viewed by users within another role or public group. For example, you may want your Sales Operations team to see the dollar value of won opportunities so that they can calculate commissions, but you probably don't want them editing the amount of that opportunity. If any role or public group possesses data that at least one other role or group shouldn't see, your sharing model must be private; all other levels of openness must be granted as an exception via groups (more on that later).



No matter which defaults you set to the sharing model, users will still have access to all data owned by or shared with users below them in the role hierarchy.

To configure the organization-wide defaults, click the Setup link and follow these steps:

- 1. Choose Administration Setup → Security Controls → Sharing Settings.**

The Sharing Settings page appears.

- 2. Click the Edit button on the Organization Wide Defaults list.**

The Organization Sharing Edit page appears.

- 3. Select the desired settings.**

Click some picklists to see the different options. The options are typically Private, Public Read Only, and Public Read/Write. For example, if you want the most restrictive model, choose the following as your defaults: Private for the major records, and Hide Details for Calendar.



A Private sharing setting on an object still assumes that people with a role above yours in the role hierarchy can see and report on those records. Salesforce always respects the hierarchy structure — sharing settings determine only how peers and those outside your typical chain of command see your data.

- 4. Click Save.**

The Sharing Settings page reappears with your settings listed under the Organization Wide Defaults list.

## *Creating groups*

You can create public and personal groups in Salesforce to extend greater sharing privileges. Groups comprise users, roles, or even other groups. So, if your organization-wide default is geared toward a private sharing model, use groups to create exceptions.

Public groups work in combination with sharing rules to expand sharing access to information beyond the organization-wide defaults. You can access public groups from the Manage Users heading or the Security Controls heading on the sidebar on the Personal Setup page.

To create a public group, click the Setup link in the top-right corner and follow these steps:

- 1. Choose Administration Setup → Manage Users → Public Groups.**

The Public Groups page appears.

- 2. Click the New button.**

A Group Membership page appears.

- 3. Enter a name for the group in the Group Name field.**

- 4. Highlight users, roles, or other groups in the Available Members list box and click the right arrow to add them to the Selected Members list box.**

- 5. Click Save.**

The Public Groups page reappears with groups that you added.

## *Granting greater access with sharing rules*

By using public groups, roles, or roles and subordinates, you can create sharing rules to extend access above and beyond the organization-wide defaults. For example, if your default sharing model is read-only but you want a group of call center agents to have edit privileges on account records, you could do this with a custom sharing rule.

To add a sharing rule and apply it to your data, click the Setup link and follow these steps:

- 1. Click the Sharing Settings link under the Security Controls heading on the sidebar.**

The Sharing Settings page appears.



2. **Scroll down and click the New button next to any of the standard or custom object Sharing Rules lists.**

All lists operate much the same but relate to different records. A sharing rule page appears for your selected record.

3. **Use the drop-down lists to define the data you want to share and the related roles or groups that you want to share that data with.**

For example, you might create a public group for your call center team and then grant them read/write privileges to data owned by members of the Entire Organization group.

4. **Click Save.**

The Sharing Settings page reappears with your new rule listed under the appropriate related list.



When you add a new sharing rule, Salesforce automatically re-evaluates the sharing rules to apply the changes. If your modifications are substantial, you'll be warned with a dialog box that the operation could take significant time, but Salesforce will e-mail you when complete. When you click OK, the dialog box closes, and the Sharing Settings page reappears. Use the Recalculate button on the appropriate related list to manually apply the changes when you've made modifications to groups, roles, or territories.

## Setting Up Profiles

In Enterprise, Unlimited, and Developer Editions of Salesforce, you can use profiles to control a user's permission to perform many functions. Roles and sharing rules determine which objects a person sees, and a profile determines what a person sees on that object. Depending on which edition you're using, you can use profiles to

- ✓ Define which page layouts a user will see.
- ✓ Control field-level access.
- ✓ Determine the apps viewed by a user.
- ✓ Alter the tabs displayed to users.
- ✓ Make record types available to certain users.
- ✓ Secure certain login settings.

## Reviewing the standard profiles

Most editions of Salesforce come with five or six standard profiles, which can't be altered except for tab settings. Many large organizations can stick to these standard profiles and address the majority of their company's requirements related to user permissions. If you have Team or Professional Edition, you can't actually view the settings on the standard profiles.

If you have Enterprise or Unlimited Edition, choose Setup⇨Administration Setup⇨Manage Users⇨Profiles to see your profiles. Otherwise, here's a brief explanation of the standard profiles and how they're typically applied:

- ✓ **System Administrators** have full permissions and access across all Salesforce functions that don't require a separate license. You'd typically grant this level of control only to users administering the system or who play a critical part in configuring and customizing Salesforce.
- ✓ **Standard Users** can create and edit most record types, run reports, and view but not modify many areas of the administration setup. If you can't create custom profiles, you'd probably choose to assign sales reps to the standard user profile.
- ✓ **Solution Managers** have all the rights of standard users and can review and publish solutions.
- ✓ **Marketing Users** have all the rights of standard users and can perform a variety of marketing-related functions, including importing leads and managing public documents and e-mail templates. If your Salesforce edition has campaigns, marketing users can also administer campaigns.
- ✓ **Contract Managers** can add, edit, approve, and activate contracts. They can also delete non-activated contracts.
- ✓ **Read Only** is just what its name implies. Users assigned to this profile can view data and export reports, but can't edit anything.



Profiles never conflict with your organization's sharing model or role hierarchy. For example, a Standard User profile allows a user to create, edit, or delete leads, but if your sharing model is read-only for leads, the Standard User won't be able to delete leads owned by others.

## Creating custom profiles

If you have Enterprise or Unlimited Edition, you can build custom profiles that provide you greater flexibility than standard permissions that can be granted to users and the layouts that they see. For example, you may want to create a custom profile for your Sales Operations team so that only users with that profile can edit check boxes on the opportunity that track whether certain signed forms have been submitted when you close a deal. See

Chapter 19 for details on creating custom layouts, business processes, and record types.

To create a custom profile, you can start from scratch, but we suggest cloning and modifying an existing profile by following these steps:

**1. Choose Setup → Administration Setup → Manage Users → Profiles.**

The User Profiles page appears.

**2. Click the Standard User link in the Profile Name list.**

The Profile: Standard User page appears. In practice, you can clone from any of the profiles, but by starting from the Standard User profile, you can simply add or remove permissions.

**3. Click the Clone button.**

The Clone Profile page appears.

**4. Type a title in the Profile Name field and then click Save.**

The Profile page for your new profile appears.

**5. Click the Edit button to modify the permissions.**

The Profile Edit page appears.



Salesforce packs a plethora of possible permissions into a profile page. Some of those permissions aren't obvious; others are dependent on your selecting other permissions. If you have questions as you're working through the Profile Edit page, click the Help for This Page link in the upper-right of the page to go directly to the relevant Help documentation. If you place your cursor over the *i* icons, located next to certain Administrative Permissions on the Profile Edit page, rollover text appears with tips on other required settings.

**6. Under the Custom App Setting section, determine which standard and custom apps are visible for a profile and which one is the default.**

This determines the content of the AppExchange app drop-down list.

**7. Under the Tab Settings section, use the drop-down lists to determine the tab settings for your new profile.**

Choose from the three possible options:

- *Default On*: You want a tab to be displayed.
- *Default Off*: You want a tab not to appear while still allowing a user assigned to the profile the choice to turn the tab back on. For example, if you created a profile for sales reps and you want to hide the Contracts tab but give the rep the option to display it, select Default Off on the Contracts field.
- *Tab Hidden*: You want the tab to be hidden without an option for the user to turn the tab back on. For example, if your company isn't going to use cases, you might decide to hide the tab.



Making a tab hidden in a user's profile doesn't prevent the user from accessing those records (in reports, for example). To prevent a user from accessing a particular type of record altogether, remove the Read permission on that type of data.

- 8. (Optional) Select the Overwrite Users' Personal Tab Customizations check box if you want to overwrite the user's current personal customization settings with the settings for the new profile that you're applying.**
- 9. Under the Administrative Permissions header, select or deselect check boxes to modify administrative permissions from the profile.**

Most of these settings are designed for administrators, but some of these might be important, depending on your goals for a custom profile. For example, if you want to build a manager's profile, you might retain permissions such as Manage Public Reports and Manage Public List Views so that managers can create public reports and list views for their teams.

- 10. Under the General User Permissions header, select or deselect check boxes to modify common user permissions from the profile.**

For example, if you don't want sales reps to be able to export customer data to a file, you could create a custom profile for reps and remove the Export Reports setting.

- 11. Under the Standard Object and Custom Object Permissions headers, select or deselect check boxes to modify standard or custom object permissions from the profile.**

For example, if you don't want support reps to be able to modify opportunities, you could create a custom profile for support reps and select only the Read check box in the row for opportunities.

- 12. Click Save.**

The Profile page reappears for your new profile. Your new profile will now appear the next time you follow the instructions in Step 1.

- 13. Click the View Users button if you want to assign users to the profile.**

A Custom: *Custom Profile Name* list page appears in which you can view, add, or reset passwords for users in the profile. See the following section to add users to Salesforce.

## *Adding Users to Salesforce*

When Salesforce supplies user licenses for your organization, administrators can add users into Salesforce. (See the "Setting Up Profiles" section, earlier in this chapter, for the scoop on viewing and modifying your company profile.) You don't have to create the roles and profiles before you add users, but

we recommend doing so because Role and Profile are required fields when you're creating a user record.

To add users, click the Setup link and follow these steps:

1. **Click the Users link under the Manage Users heading on the sidebar.**

A users list page appears.

2. **(Optional) Use the View drop-down list if you want to select from standard or custom list views of your users.**

Salesforce presets your views with three standard options: All Users, Active Users, and Admin Users.

3. **Click the New User button to add users one at a time.**

A New User page appears in Edit mode.

To enter a list of users (instead of one at a time) that need to be created, click the Add Multiple Users button instead.

4. **Complete the fields, paying close attention to selecting appropriate Role and Profile values.**

Select the Generate New Password and Notify User Immediately check box at the bottom of the New User page if you want the user to immediately receive an e-mail with her user name and temporary password. If you're in the midst of an implementation, we recommend clearing this check box and doling out passwords when you're good and ready.

5. **Click Save.**

The User detail page appears.



## *Using Other Security Controls*

Beyond the major configuration settings (such as roles, profiles, and sharing model), as an administrator, you have other settings for managing the use and security of your data in Salesforce. You can find these features by choosing Setup⇒Administration Setup⇒Security Controls.

In the following sections, we discuss how to manage field-level access and delegate a subset of administration to others.

### *Setting field-level security*

If you have Enterprise or Unlimited Edition, you have three primary ways to control access and editing on specific fields: profiles (which we discuss earlier in this chapter), page layouts (Chapter 19 covers these), and field-level

settings (stay right here for the details). With field-level security, you can further restrict users' access to fields by setting whether those fields are visible, editable, or read-only.

To view and administer field-level security, click the Setup link and follow these steps:

**1. Choose Administration Setup → Security Controls → Field Accessibility.**

The Field Accessibility page appears.

**2. Click the link for the type of record for which you want to view and manage field-level security.**

A Field Accessibility page for the selected record type appears. For example, click the Account link if you want to review the security settings on account fields.

**3. Under the Choose Your View header, click the View by Fields link.**

The Field Accessibility page for the record type reappears with a Field drop-down list. If you want to see a different view of this information — in which you get to see one profile and the security levels for all the fields for the selected data type — click the View by Profile link.

**4. Select a field from the Field drop-down list.**

The page reappears with a table displaying your company's profiles and the profiles' accessibility to the selected field.

**5. In the Field Access column, click a link to edit the profile's field access.**

An Access Settings page for the selected profile and selected field appears, as shown in Figure 20-2.

**6. Select the check boxes to modify the field-level settings, and then click Save.**

The Field Accessibility page for the selected record type reappears.

Access Settings for Account Field  
Annual Revenue Help for this Page

The Annual Revenue field is currently Editable for the Custom: Sales Profile profile.

Save Cancel

**Field-Level Security:**

Profile	Field	Visible	Read-Only
Custom: Sales Profile	Annual Revenue	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Page Layout:**

Remove or change editability of the Annual Revenue field on the Account (Sales) Layout page layout.  
 Choose a different page layout for the Custom: Sales Profile profile.

Use the checkboxes below to change the page layout settings for the Annual Revenue field on the Account (Sales) Layout page layout.

Page Layout	Field	Visible	Read-Only	Required
Account (Sales) Layout	Annual Revenue	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel

**Figure 20-2:**  
Modify field-level access on a profile.

## *Delegating administration*

As an administrator for your growing world of Salesforce users within your company, you hold the key to who accesses your Salesforce instance. You shouldn't try to cut corners by making everyone system administrators just because you're annoyed each time they bug you to add a new user. Salesforce allows you to delegate some administrative duties to non-administrators.

Delegated administrators can help you create and edit users in roles you specify, reset passwords for those users, assign users to certain profiles, and manage custom objects. For example, if your marketing department is growing quickly, you may want to allow a manager in the Marketing Manager role to create and edit users in the Marketing Manager role and all subordinate roles.

To delegate administration, you must first define the groups of users to whom you want to delegate these new privileges. Then you have to specify what you want those newly delegated administrators to do. To define delegated administrators, follow these steps:

- 1. Choose Setup → Administration Setup → Security Controls → Delegated Administration.**

The Manage Delegated Groups page appears.

- 2. Click New.**

The Edit Delegated Group page for the new delegated group appears.

- 3. Enter the Delegated Group Name.**

In our example, we selected Sales Operations.

- 4. Click Save.**

The Delegated Group page for your new group appears.

- 5. Click the Add button on the Delegated Administrators related list to specify which users will belong in this group.**

The Delegated Administrators page appears.

- 6. Use the Lookup icons to find and add users to this group.**

- 7. Click Save.**

The Delegated Group page for your group reappears.

- 8. To specify which roles and subordinate roles a delegated administrator can manage, click the Add button on the User Administration related list.**

The Roles and Subordinates page appears.

- 9. Use the Lookup icons to find and add roles that your delegated group may manage.**

**10. Click Save.**

The Delegated Group page for your group reappears.

**11. Click Add in the Assignable Profiles related list to specify which profiles these delegated administrators may assign to users.**

The Assignable Profiles page appears.

**12. Use the Lookup icons to find and add profiles that your delegated group may assign.****13. Click Save.**

The Delegated Group page for your group reappears.

**14. Click Add in the Custom Object Administration related list to specify which custom objects and related tabs a delegated administrator may manage.**

The Custom Object Administration page appears.

**15. Use the Lookup icons to find and add custom objects that your delegated group may assign.****16. Click Save.**

The Delegated Group page for your group reappears.

## *Customizing the Look and Feel*

If your business wants to take advantage of the latest Web technologies, Salesforce includes some advanced customizations that not only improve your efficiency but will really wow your colleagues during a demonstration.

In the following sections, we discuss how to take advantage of the latest customizations that improve your user experience.

### *Enabling the latest user interface*

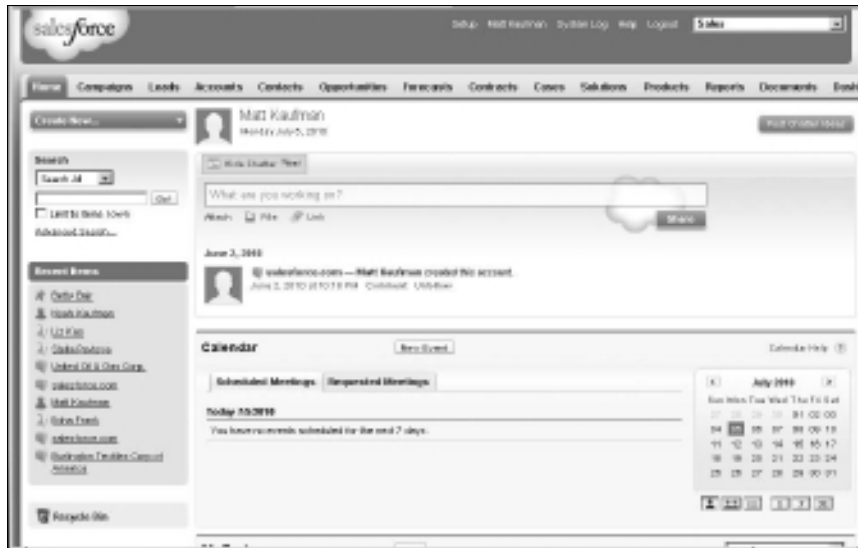
**1. Choose Setup⇒App Setup⇒Customize⇒User Interface.**

The User Interface settings page appears.

**2. Select the Enable New User Interface Theme check box.****3. Click Save.****4. Click the Home tab at the top of the screen.**

The latest salesforce.com interface is now turned on, as shown in Figure 20-3.





**Figure 20-3:**  
The latest  
salesforce.  
com  
interface.

## *Drag and drop, hovers, and other tweaks*

In addition to updating the look and feel, the User Interface page allows you to turn on some timesaving functions that will greatly increase your organization's productivity. Here's a quick summary of just some of the features available to you:

- ✓ **Enable Hover Details** displays an interactive overlay with details about a record when you leave your mouse hovering over a link to that record.
- ✓ **Enable Related List Hover Links** adds shortcuts to related lists to the top of each record so that you never have to scroll to see your related lists.
- ✓ **Enable Inline Editing** allows you to edit a field on a record just by double-clicking it.
- ✓ **Enable Enhanced Lists** turns your existing Custom Views into a spreadsheet-like page on which you can mass-edit values across multiple records.
- ✓ **Enable Home Page Hover Links for Events** allows you to see more information about an event on your Salesforce calendar just by hovering your mouse over it.

- ✔ **Enable Drag-and-Drop Editing on Calendar Views** allows you to rearrange events on your Salesforce calendar simply by dragging the event from one time to another.
- ✔ **Enable Hover Links for My Tasks list** allows you to see more information about a task on your Salesforce task list just by hovering your mouse over it.

All these tweaks and more can be made from the User Interface page as follows:

**1. Choose Setup → App Setup → Customize → User Interface.**

The User Interface settings page appears, as shown in Figure 20-4.

**2. Select one or more of the user interface setting check boxes.**

**3. Click Save.**

**User Interface** Help for this Page ?

Modify your organization's user interface with the following settings:

**User Interface**

- Enable Collapsible Sections
- Show Quick Create
- Enable Hover Details
- Enable Related List Hover Links
- Enable Separate Loading of Related Lists
- Enable Inline Editing
- Enable Enhanced Lists
- Enable New User Interface Theme
- Enable Printable List Views
- Enable Spell Checker
  - Enable Spell Checker on Tasks and Events

**Sidebar**

- Enable Collapsible Sidebar
- Show Custom Sidebar Components on All Pages

**Calendar**

- Enable Home Page Hover Links for Events
- Enable Drag-and-Drop Editing on Calendar Views
  - Enable Click-and-Create Events on Calendar Views
  - Enable Drag-and-Drop Scheduling on List Views
- Enable Hover Links for My Tasks list

**Setup**

- Enable Enhanced Page Layout Editor
- Enable Enhanced Profile Management

**Figure 20-4:**  
Tweak user  
interface  
settings  
here.

## Chapter 21

# Customizing Salesforce with Force.com

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### *In This Chapter*

- ▶ Modifying standard business processes
  - ▶ Managing multiple business processes
  - ▶ Customizing page and search layouts
  - ▶ Managing record types
  - ▶ Using dependent picklists
  - ▶ Setting workflow processes
- 

**I**f you're just beginning your implementation, Salesforce comes preconfigured with a number of common fields in simple layouts for each of the tabs. You could buy your licenses, log in, and without any customization, start using it to track your customers. So why is it that with over 77,300 customers and growing, no two instances of Salesforce are likely to be identical?

The answer is a key ingredient to your success: The more Salesforce is customized to your business, the more likely your company will use it effectively and productively.

If you're an administrator or a user with permission to customize Salesforce, you have a universe of tools to design Salesforce to fit the way you do business. And you don't need to be a technical wizard to make these changes. With common sense and a little help from this book, you can customize Salesforce on your own.



You may hear the phrase *Force.com* used when talking about Salesforce's customization capabilities. That is the umbrella term used to describe everything under the Setup link, where all the many Salesforce customization features are located. It's described as the foundational platform that makes Salesforce and its many custom applications possible.

We could write another book if we tried to address each feature. In this chapter, we show you how to perform all the core customization options, including creating fields, building in your standard processes, adding Web links, and rearranging layouts. Then, for companies that have Enterprise or Unlimited Edition and possess complex needs, we show you how to develop custom page layouts, multiple business processes, and record types that link to custom profiles.

## Discovering Customization

All your customization tools are conveniently accessible from the Customize menu located under the App Setup heading of Setup in Salesforce. Navigating the Customize menu is simple when you understand some basics. If you have administrative permissions, log in to Salesforce and do this now:

### 1. Choose Setup → App Setup → Customize.

The Customize page of Setup appears, and the sidebar expands to display headings for the various objects that can be customized; see Figure 21-1. Under the Customize heading on the sidebar, you see a few select headings for other areas of Salesforce (such as Call Center and Self-Service), which can also be customized.



**Figure 21-1:**  
Expanding  
the cus-  
tomization  
sidebar.

2. **Click the + buttons or headings that correspond to the major tabs, such as Accounts, Contacts, and Leads.**

The sidebar expands with the different customization features available under each heading. These are all the basic things you can do when customizing a standard tab. Notice that although certain headings have more features, most of the headings have links to common customization features, such as Fields, Page Layouts, Search Layouts, Buttons and Links, and in certain editions, Record Types and Processes.

3. **Click the Fields link under a tab-related heading on the sidebar.**

A Fields page appears based on the selected tab heading. This easy and consistent navigation will help you through the customization.

## *Breaking down basic elements*

When diving into customization, keep these five basic concepts in mind:

- ✓ **Records** are the high-level data elements (such as accounts, contacts, and opportunities) that are stored in the Salesforce database. Each tab corresponds to a type of record. Records consist of fields.
- ✓ **Page Layouts** is the feature that allows you to control how a page is displayed to users.
- ✓ **Search Layouts** is the feature that allows you to control how search results are displayed to users. Search layouts correspond to the organization of columns that are displayed on a Search Results page, lookup dialog page, or record home page in Salesforce.
- ✓ **Processes** is an option for some objects, allowing you to build various sales, marketing, and service processes in Salesforce that you want your reps to follow.
- ✓ **Record Types** is the feature that allows you to offer certain business processes and subsets of drop-down lists to users based on their profiles. Not to be confused with a type of record (such as an account or contact), a record type, when used with page layouts and profiles, can make only some of the drop-down list values available to users within a profile.

## *Customizing for relevance*

Prior to customizing Salesforce, your CRM project team should conduct a series of business process reviews with functional representatives or stakeholders of the teams that will be using Salesforce. In those meetings, not only

should you map out current and desired processes, but you should ask sets of leading questions that will impact the design of fields, records, layouts, and more. Key questions should include

- ✓ How do you define your customer?
- ✓ What information do you want to collect on a contact?
- ✓ How do you know you have a qualified lead?
- ✓ What do you want to know about an opportunity?

Use the answers to construct a list of standard and custom fields per record that you believe should be in Salesforce. That spreadsheet should include columns for field name, field type, field values, justification, and so on, and you should review it with your project team prior to customization.



When customizing, keep it simple at the beginning. Don't add or keep a field unless you ultimately believe that you or someone else will use it. You can always build additional fields in the future, especially if you build momentum based on early user adoption success.

## *Building and Editing Fields*

Maybe you've heard the adage from the movie *Field of Dreams*: "If you build it, they will come." Well, when it comes to customizing Salesforce fields, the "it" stands for "something useful and easy." The more relevant you make the record fields to your actual business, the better the user adoption batting average and the higher the likelihood of hitting a home run.

### *Adding fields*

All editions of Salesforce allow you to add fields, but some versions allow you to add significantly more fields than others. For example, if you have Group Edition, you can add 100 custom fields per record; with Enterprise and Unlimited Edition, you can create up to 500 per record.

To add a field, click the Setup link in the top-right corner of Salesforce and follow these steps:

- 1. Click any tab-related heading under the Customize heading on the sidebar.**

The options under the selected heading appear.

**2. Click the Fields link under the heading.**

The Fields page for the tab appears, displaying a list of standard fields at the top and a list of custom fields and relationships at the bottom.

**3. Click New on the Custom Fields & Relationships related list.**

Step 1 of the New Custom Field Wizard appears. Data types with descriptions of each of them appear in a list.

**4. Select a radio button matching the type of field you want to create and then click Next.**

Step 2 of the wizard appears, asking you to enter details about the field you want to create. These two fields are required:

*A field label* is what's displayed on page layouts, in reports, and to end users' eyes. For example, "Reimbursement Date."

*A field name* may be the exact same as a field label but may use an underline (   ) as a substitute for a space character. Field names are used as an internal reference by Salesforce and are key for integration. For example, "Reimbursement\_Date."

**5. Enter the details and click Next.**

Step 3 of the wizard appears. The details page varies based on the field type you selected. For example, the settings for a Text Area field are different than for a Currency field.

If your company's edition is not Enterprise or Unlimited Edition, click Save and you're done. Optionally, click Save & New to immediately save this custom field and begin creating another one.

**6. For Enterprise or Unlimited Edition, use the check boxes to select the field level security access and edit rights per profile and then click Next.**

Step 4 of the wizard appears.

**7. For Enterprise or Unlimited Edition, use the check boxes to select the page layouts that should include this field and then click Save.**

The Fields page for the selected record reappears.

## *Viewing and updating fields*

On an ongoing basis, situations come up in which you might need to update the properties of a field. For example, management changes or adds statuses, nomenclature changes so field labels need to change, and so on.

To view and update your fields, choose Setup⇄App Setup⇄Customize. Then click the Fields link under a tab heading under the Customize heading on the sidebar. The Fields page for the selected tab appears, displaying lists of standard and custom fields. From this page, you can do the following:

- ✓ **Update a field.** Click the Edit link.
- ✓ **Change the field type on a field.** Click the Edit link, and then click the Change Field Type button at the bottom of the Step 2 page. Step 1 of the wizard appears, and you can follow the steps in the preceding section, starting with Step 4.
- ✓ **View the field and its properties.** Click a link in the Field Label column.
- ✓ **Delete a custom field.** Click the Del link next to the field.
- ✓ **Add values to a drop-down list.** Click the link in the Label column, and then click the New button on the Picklist Values list.
- ✓ **Replace values on a drop-down list.** Click the Replace link next to a field. A Find and Replace Picklist page appears. Make sure to add the new value before trying to replace.



The Replace feature is really helpful when you have existing records with old values that need switched to new values. Take the Lead Status field, for example: You could use the Replace feature to update leads formerly marked as Unqualified and replace them all instantly with a new value called Garbage.

- ✓ **Reorder values on a drop-down list.** Click the link in the Label column, and then click the Reorder button on the Picklist Values list.

## *Replicating your key standard processes*

On certain standard records in Salesforce, you use a standard drop-down list to map your business processes.

You'll probably want to put some careful thought into handling each type of record. To define your standard business processes, do the following:

1. **Expand the Customize menu until you see the Fields links for various records (under the Activities heading, refer to the Task Fields link).**
2. **Click a Fields link under one of the records mentioned in Step 1.**

The Fields page appears with Standard Fields and Custom Fields & Relationships related lists.



3. Depending on the record you chose, look on the Standard Fields related list and then click the Status or Stage link to modify the corresponding processes.

In each circumstance, a field page appears with a Picklist Values related list, listing all of the values within the process.

4. On the Picklist Values related list, adjust your process, as necessary.

See the preceding section for details on updating picklist fields.

## *Understanding custom formula fields*

After you get the hang of adding custom fields, explore some additional cool things you can do with them.

*Custom formula fields* are a custom field type that automatically calculate their values based on the content of other values or fields. For example, if you charge your customers a shipping and handling fee based on the total quantity of a product listed in an opportunity, create a custom formula field called S&H that multiplies your total quantity amount with a predefined value.

To create a custom formula field, first define the task at hand. What is it you want to calculate? Then follow up to Step 3 of the numbered list in the section “Adding fields,” earlier in this chapter, and choose to add a Formula field. Then continue with these steps:

1. At Step 2 of the New Custom Field Wizard, provide a field label and field name.
2. Use the radio buttons to select the format that your returned value will take and then click Next.

Depending on your selection, Salesforce may ask you how many decimal spaces you want your returned value to display.

3. Type your formula in Step 3 (as shown in Figure 21-2).

Salesforce displays two subtabs — Simple Formula and Advanced Formula — to help you with creating your formula, and adding your formula for Salesforce to process:

- *Simple Formula*: Reveals a subset of merge fields to add to your formula, along with standard math operators
- *Advanced Formula*: Reveals all possible merge fields for your record, provides more operators, and shows you a set of Excel-like function categories that you can use to plug into your formula

To use either, simply move your mouse over the tab you want to use and click it. The body of that tab appears.



**Figure 21-2:**  
Create a  
custom  
formula.

**4. Click Validate when complete to make sure your formula is up to snuff. Click Next.**

If you get an error message, go back and check your formula. Salesforce's error messages will tell you if it can't find the fields you're referencing, if you used an incorrect parameter, and so on.

**5. On Step 4, confirm field-level security for your new field and then click Next.**

Because it derives its content automatically, the field will be a read-only field. You just have to confirm who can see it.

**6. On Step 5, confirm which page layout you want to add this new field to. Click Save when finished.**

The Fields page for the record reappears.



You don't have to be a math or Excel whiz to benefit from custom formula fields although those skills sure can help you master it faster. If you're like the rest of us and would rather not even figure out the tip on your dinner tab, make sure you go to the Salesforce Blog Web site at <http://sites.force.com/blog> and search for the *100 Ways to Use Custom Formula Fields* guide for a ton of suggestions on how your organization can benefit from prebuilt formulas.

## Using Custom Buttons and Links

Many sales, marketing, and support teams rely on Web sites and secure Web applications to perform their jobs. For example, your company might use a research Web site for market intelligence. By building powerful custom links that connect to important Web sites, users can use Salesforce more efficiently without having to manually open another browser window.

The Salesforce Force.com platform allows you to create custom buttons to represent your links or to perform actions that would usually take several mouse clicks to complete, such as escalating a case.

To build a custom button or link, click the Setup link in the top-right corner and then follow these steps:

- 1. Click any record heading under the Customize heading on the sidebar.**

The selected heading expands.

- 2. Click the Buttons & Links link under the record heading.**

The Buttons & Links page for the selected record appears.

- 3. Click the New button on the Custom Buttons and Links list.**

The Custom Link page appears in Edit mode. Complete the fields as explained, telling Salesforce whether you're creating a button or a link, and what action should occur when you click it.

- 4. Click Save when finished.**

The Custom Link page reappears.

This book doesn't go into any technical detail about Visualforce. What you should know about Visualforce is the following: If your company has specific business processes not addressed by Salesforce, you can use Visualforce to build your own application in Salesforce. Visualforce combines HTML with browser-based technologies, such as Java and ActiveX, so you'll need to recruit some techie geeks if this sounds foreign. Think, though, how much time your company could save if, for example, your reps could click a custom link on an opportunity page and immediately populate an order form in Salesforce. You could do that. For additional information on Visualforce, go to [developer.force.com](http://developer.force.com).



To display your custom links to users, you must add the new links to the appropriate page layout. See the section "Modifying a page layout," later in this chapter.

## Customizing Page and Search Layouts

Wouldn't it be great if you could take the fields on a record and rearrange them like jigsaw puzzle pieces on a page until they fit just right? Sounds too good to be true, but with Salesforce, you can do just that and more.

Use page layouts to modify the position of fields, custom links, and related lists on Record detail pages and Edit pages. While you're modifying a page layout, you can also edit field properties to determine which fields should be required or read-only.

And with Enterprise and Unlimited Editions, you can create multiple page layouts and assign them to profiles. By doing this, you can ensure that different users are viewing just the right information to do their jobs.

### Modifying a page layout

If you have permission to customize Salesforce, you can modify page layouts at any time. We typically recommend that you create some or the majority of your proposed custom fields first before rearranging them on the layout.

To edit a page layout, click the Setup link in the top-right corner of any Salesforce page and follow these steps:

- 1. Click any tab heading under the Customize heading on the sidebar.**

The selected heading expands with links to customization options.

- 2. Click the Page Layouts link under the tab heading.**

The Page Layout page for the selected tab appears.

- 3. Click the Edit link next to a page layout that you want to modify.**

A Page Layout editor appears with the editor at the top and a sample layout below it (see Figure 21-3).

- 4. Choose from the following options to edit the layout using the nifty drag-and-drop user interface:**

- *Arrange fields, custom links, or related lists.* Select an option from the View drop-down list on the left sidebar of the layout editor, and then click and drag fields from the right column of the layout editor to desired locations on the sample layout.
- *Rearrange existing fields.* Hover over them in the sample layout to highlight them, and then click and drag them to the updated destination on the layout. A dark bar shows you where the field will "land" after you drop it.

- *Modify field properties.* Hover over a field on the sample layout, and then click the wrench icon to the right of the field. In the pop-up window that appears, use the check boxes to modify Read Only and Required settings and then click OK.
- *Organize the record with sections.* Hover over a section header and click its wrench icon. Alternatively, click the + Section button in the layout editor and drag it to where you want it to appear in the sample layout. In the pop-up window that appears, type a name for the section, use the drop-down lists to adjust basic settings (such as columns) and then click OK.

For example, on an account page layout, you might want to build a section named Strategic Account Planning to organize fields for account planning. When you click OK, the window closes.

**5. To preview the layout, click the Preview As button on the layout editor.**

Select which user perspective you want to view. A window appears with sample data displayed in the layout as it's currently modified. In the preview window that opens, review the layout and click Close.

**6. When you're satisfied with your layout changes, click Save on the layout editor.**

The Page Layout page for your selected record reappears.



**Figure 21-3:**  
Viewing the  
page layout  
editor.

## *Assigning layouts to profiles*

After you create custom page layouts, you can assign your layouts to profiles. By doing this, users will view detail pages based on their profile and associated page layout.

To assign layouts to profiles, click the Setup link in the top-right corner of any Salesforce page and follow these steps:

**1. Click any tab heading under the Customize heading on the sidebar.**

The selected heading expands with a menu of options.

**2. Click the Page Layouts link under the tab heading.**

The Page Layouts page for the selected tab appears.

**3. Click the Page Layout Assignment button at the top of the Page Layouts list.**

A Page Layout Assignment page appears with a list of current assignments.

**4. Click the Edit Assignment button.**

The page reappears in Edit mode.

**5. In the Page Layout column, highlight one or multiple cells by clicking the links.**

Ctrl-click or Shift-click to select multiple cells.

**6. From the Page Layout to Use drop-down list, choose the page layout that you want to assign to the selected profiles.**

**7. When you're done, click Save.**

The Page Layout Assignment page reappears, displaying your changes.

## *Changing search layouts*

If you've ever seen some search results and wished they showed a few more column headers, you're in for a treat. Search layouts allow you to determine which standard or custom fields appear as headers in multiple types of search features for your organization:

- ✓ Search results from the sidebar or advanced search
- ✓ Lookup dialog boxes that pop up a window when you click the Lookup magnifying glass next to a field

- ✓ Lookup phone dialog boxes that pop up a window when you click the magnifying glass icon on a SoftPhone dial pad, which then allows you to make calls from your computer
- ✓ Recent Records lists that appear in a tab's home page
- ✓ Search results filter fields for narrowing down searches

Additionally, you can choose to show or hide standard and custom buttons in a list view page.

To change a search layout, follow these steps:

**1. Click any tab heading under the Customize heading on the sidebar.**

The selected heading expands with a menu of options.

**2. Click the Search Layouts link under the tab heading.**

The Search Layouts Page for the selected tab appears.

**3. Click the Edit link next to any of the search features you'd like to change.**

The Edit Search Layout page for the chosen search feature appears.

**4. Move fields from the Available Fields column to the Selected Fields column using the Add and Remove arrows, as needed. Select or clear any standard or custom buttons that you'd like on your list view.**

**5. Click Save when finished.**

The Search Layouts page for the selected tab reappears.

## *Managing Multiple Business Processes*

Configuring multiple business processes is particularly helpful if you have several groups of users who use a common tab (such as Leads) but whose processes are different. (And maybe the group leaders don't want to compromise.) For example, if your company has two sales teams that follow different sales methodologies, you can use multiple business processes and keep everyone happy. Multiple business process features are available only in Enterprise and Unlimited Editions and pertain only to lead, opportunity, case, and solution records.

To set up multiple business processes, click the Setup link in the top-right corner of any Salesforce page and follow these steps.

1. **Click the Lead, Opportunity, Case, or Solution headings under the Customize heading on the sidebar.**

The selected tab headings expand.

2. **Click the Fields link under one of the selected tab headings.**

The Fields page for the selected tab appears, displaying a list of standard fields at the top and a list of custom fields at the bottom.

3. **Under the Standard Fields list, click the Edit link next to the Status or Stage field to modify the drop-down list.**

For example, on the Opportunities Fields page, click the Edit link next to the Stage field.

A Picklist Edit page appears for the selected field.

4. **Review the existing values and then click the New button to add additional values.**

An Add Picklist Values page appears.

5. **Add one or more values and then click Save.**

The Picklist Edit page reappears.

6. **Review the list to verify that you have a complete master list of statuses or stages to support all business processes for that record.**

7. **(Optional) Click the Reorder button to change the order of the values. Click Save.**

The Picklist Edit page appears in Edit mode, where you can reorder the list by using the arrow buttons to change the order of the drop-down list. When you click Save, the Picklist Edit page reappears.

8. **On the sidebar, click the Processes link under the selected record heading.**

For example, under the Opportunities heading, click the Sales Processes link.

The Processes page for the selected record appears.

9. **Click the New button to create a new process.**

A Process Edit page appears.

10. **Choose the Existing Process, name the new process, and then click Save.**

A Process page appears, and you can select the values for your new business process.

If you select Master as the Existing Process, you can choose from the master list generated from the Status or Stage field of the record.





**11. Highlight values and use the arrow buttons to modify your Selected Values list.**

For example, if your company has a sales team that handles boat orders, you could create a simple sales process.

**12. Choose a Default Value from the drop-down list; when you're done, click Save.**

The Default Value drop-down list appears for lead, case, and solution processes but not for sales processes. The Processes page for your selected record reappears.

## *Managing Record Types*

If you're using Enterprise or Unlimited Edition, you can use record types to make subsets of drop-down lists and custom business processes available to specific sets of users. For example, if you have two sales teams — say, one that sells into healthcare services and another that sells into retail verticals — both teams might share common fields on an account record but with very different values. With record types, you can customize accounts so that the same Industry field displays retail sectors for one group and healthcare services verticals for the other. When you provide record types to your users, the big benefit is that you make common drop-down lists easier to fill out and more relevant.

You can build record types to support all of the major records in Salesforce, including leads, accounts, opportunities, and so on. Before users can take advantage of the record type feature, though, you need to first create the record types and then assign them to profiles. The good news is that with the Salesforce Record Type Wizard, you can perform both actions in a series of guided steps.



Before creating your record types, check that you added all values to a master picklist field (drop-down list). (See the section “Viewing and updating fields,” earlier in this chapter, for details on editing drop-down lists.)

To create a record type, click the Setup link in the top-right corner of any Salesforce page and follow these steps:

**1. Click any tab heading under the Customize heading on the sidebar.**

The selected tab heading expands.

**2. Click the Record Types link under the tab heading.**

The Record Type page for the selected tab appears.

### 3. Click the New button.

Step 1 of the New Record Type Wizard appears, as shown in Figure 21-4.

### 4. Complete the fields at the top of the page.

Most are obvious, but here are three important pointers:

- *Existing Record Type:* Choose from this drop-down list to clone from another record type. The new record type will inherit all the drop-down list values from the existing record type. You can then modify it later.



If you choose not to clone, the record type automatically includes the master drop-down list values for both custom and standard fields. That's okay; you can edit the drop-down lists later.

- *Business process:* On a lead, opportunity, case, or solution record type, select the business process from the drop-down list. See the preceding section for details.
- *Active:* Select this check box if you want to make the record type active.

### 5. Select the check boxes in the table to make the new record type available to different profiles.

If you ever need to modify the assignment of record types to profiles, you can do this from the Record Type Settings section of a profile page. Simply click the Edit link next to a record type and follow the easy steps on the page that appears. (See Chapter 20 for details on updating profile settings.)



New Record Type  
Contact Help for this Page ?

Step 1. Enter the details Step 1 of 2

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type ! = Required Information

Existing Record Type

Record Type Label

Record Type Name

Description

Active

Select the Enable for Profile checkbox to make the new record type available to a profile. Users assigned to this profile will be able to create records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select the Make Default checkbox.

Profile Name	Record Types Currently Available	<input checked="" type="checkbox"/> Enable for Profile	<input type="checkbox"/> Make Default
Contract Manager		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer Portal Manager		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Figure 21-4:**  
Creating a  
new record  
type.

**6. When you're done, click Next.**

Step 2 of the wizard appears.

**7. Use the drop-down lists to select the page layout that different profiles will see for records of this record type.**

You can apply one layout to all profiles or assign different layouts to different profiles.

**8. When you're done, click Save.**

The new Record Type page appears with a list of the drop-down lists on the record type.

**9. Click the Edit link next to a drop-down list to modify the values.**

A Record Type Edit page appears.

**10. Highlight values in the Available Values or Selected Values list box and use the arrow buttons to build the Selected Values list as you want it.**

**11. Select a value from the Default drop-down list, if necessary, and then click Save.**

The Record Type page reappears.



If a user will need to make use of multiple record types, remember to add the Record Type field manually to a page layout. For example, if a sales rep sells both generators and engines (and opportunity record types exist for both), providing the Record Type field on a layout allows the rep to switch a generator opportunity to an engine opportunity, if needed. See the section “Customizing Page and Search Layouts,” earlier in this chapter, for details.

## Creating Dependent Picklists

If you find your picklist values building up and affecting the user's experience, you should consider using *dependent picklists* to show values in one list based on what's selected in another list. For example, you could create a custom picklist field called Reason for your opportunity record and offer two sets of reasons, depending on whether the opportunity was won or lost.

Creating these lists is a two-step process:

1. Your two fields must exist.

Think about which fields will dictate the drop-down list for what other fields. The field that determines another field's values is the *controlling field* and can be a standard or custom picklist, or a check box. The field that's dependent on the controlling field to determine its displayed

values is the *dependent field*. We cover this step in the “Adding fields” section, earlier in this chapter.

2. Tell Salesforce about these two fields and their roles in this relationship. That’s what we cover in this section.

To define field dependencies, follow these steps:

1. **Expand the Customize menu until you see the Fields links under the appropriate tab (under the Activities heading, refer to Activity Custom Fields).**

The Fields page appears.

2. **Click Field Dependencies on the Custom Fields & Relationships related list.**

The Field Dependencies page for your record appears.

3. **Click New.**

The New Field Dependency page appears in Edit mode.

4. **Select your controlling and dependent fields. Click Continue to determine what gets filtered.**

A field can be dependent to just one controlling field. However, that dependent field may also act as a controlling field to daisy-chain together several dependencies.

5. **At the Edit Field Dependency page, select which dependent list items are visible for which controlling field values, and then click Include Values.**

If your controlling field has several items in its drop-down list, you might have to click the Next link to see additional columns. You can also select multiple values at once by Shift-clicking to select a range of adjacent cells or Ctrl-clicking to select cells that aren’t adjacent.

6. **(Optional) Click the Preview button to see a pop-up window demo your dependent picklist.**

7. **Click Save.**

The Field Dependencies page returns with your new dependent picklist listed.



Record types allow certain people to see the same subset of picklist values every time. Dependent picklists allow a user to see different subsets of picklist values based on what they choose in the controlling field.

## Managing Workflow & Approvals

How many times have you lost business because someone forgot to do something in your sales process? With the workflow feature in Salesforce, you can create a rule and associate it to tasks and alerts that can be assigned to different users. You can also update the value of a field on a record if a certain rule occurs. Enterprise and Unlimited Edition users can use workflow to automate certain standard processes to make sure important balls don't get dropped. For example, if your sales reps create opportunities that sometimes require special pricing paperwork, you can use a workflow rule to automatically send e-mail alerts and tasks to finance and sales managers, and you can set these alerts and tasks to go out a set number of hours later.

Before creating a workflow process, take a moment to understand some basic workflow concepts:

- ✓ *Workflow rules* are the criteria you set that, when triggered, tell Salesforce to assign tasks or send e-mails.
- ✓ *Workflow field updates* specify what field is updated on an object when a workflow rule is triggered.
- ✓ *Workflow tasks* are the tasks that a workflow rule assigns to users when triggered.
- ✓ *Workflow alerts* are the e-mail templates that a workflow rule sends to specific recipients. (Before creating a workflow alert, make sure you've created the e-mail template that you'll be sending.)
- ✓ *Workflow tasks and alerts* may be re-used for different workflow rules.

To create a workflow process, first make sure you can fill in the blanks in this sentence: *When X happens, I want A, B, and C to happen.* Your X is your workflow rule, and the A, B, and C actions are the field updates, tasks, and e-mail alerts. Choose Setup⇨Create⇨Workflow & Approvals to begin.

### Creating workflow rules

To create a workflow rule, follow these steps:

- 1. Click the Workflow Rules link under the Workflow & Approvals heading on the sidebar.**

If this is your first time, the Understanding Workflow page appears.

**2. Click Continue after reading the overview.**

The All Workflow Rules page appears.

**3. Click the New Rule button to create a new rule.**

Step 1 of the Workflow Rule Wizard appears for your new rule.

**4. Select the type of object to which the workflow rule should apply.****5. Click Next to continue.**

Step 2 of the Workflow Rule Wizard appears. To configure your rule, do the following steps:

*a. Enter a Rule Name and optional description.*

*b. Decide when the rule will be evaluated by Salesforce. Only when a new record is created, when the record is created or it's been edited and didn't previously meet the triggering criteria, or every time the record is created or edited.*

*c. Use the rule criteria to determine what conditions must be met to trigger the rule. Use the Advanced Options for more complex AND/OR scenarios.*

**6. Click Save & Next.**

The Specify Workflow Actions screen appears.

**7. Identify what happens when the workflow criteria is met.**

An action can happen immediately, or it can happen a specific number of hours or days before or after certain criteria is met. You can create new actions (see the following section for more information) or use existing ones associated with immediate or time-based workflow triggers.

## *Assigning workflow tasks*

To create a new workflow task, first go to the workflow rule that you want to associate with this task:

**1. Choose Setup → App Setup → Create → Workflow & Approvals → Workflow Rules and click the Rule Name of the appropriate rule.**

The Workflow Rule page for the rule appears.

**2. Click Edit from the Workflow Actions related list.**

The Specify Workflow Actions step appears.

3. In the **Immediate Workflow Actions** area, click the **Add Workflow Action** button and select **New Task** from the resulting drop-down list.
4. Configure the task as you would a regular task, but note the **Due Date** field.
5. Complete the **Due Date** field so the created task has a due date that's a number of days relative to a base date you select in the drop-down list.
6. Click **Save** when finished.

The Workflow Task page for this task appears. Note that the Rules Using This Workflow Task related list shows the associated workflow rule.



Choose Setup → App Setup → Create → Workflow & Approvals → Field Updates to select what field on what object changes when a workflow rule is triggered.

## *Using workflow e-mail alerts*

To create a new workflow e-mail alert, first go to the workflow rule that you want to associate with this task:

1. Choose Setup → App Setup → Create → Workflow & Approvals → Workflow Rules and click the Rule Name of the appropriate rule.

The Workflow Rule page for the rule appears.

2. Click **Edit** from the **Workflow Actions** related list.

The Specify Workflow Actions step appears.

3. In the **Immediate Workflow Actions** area, click the **Add Workflow Action** button and select **New Email Alert** from the resulting drop-down list.

4. Complete the fields to associate an e-mail template with a set of recipients.

Note that the recipients may be Salesforce users or not.

5. Click **Save** when finished.

The Workflow Alert page for this alert appears.

At the Specify Workflow Actions page, you can also click the **Add Workflow** button to have a new field updated, or an outbound message sent when a certain event occurs.



## Approval processes

Approval processes are a more advanced type of workflow that notifies users when an action is triggered; requires the user to review, then approve or reject the action; and then sets off additional actions. For example, an expense report may follow one route of approvals if it's for \$250 or less, and another process if it's for an amount more than \$10,000. Before setting forth with activating this feature for a certain record, make sure you think through the following questions:

- ✔ Do all records of this type absolutely require approval, or just certain ones?
  - ✔ Who's allowed to submit records for approval?
  - ✔ Should a record be automatically approved or rejected in certain circumstances?
  - ✔ Should any actions take place on the record as it moves through the approval chain?
  - ✔ Who should be able to edit records that are in the process of being approved?
- ✔ Who should approve or reject items? Can that person delegate that privilege to someone else, in his or her absence?
  - ✔ What should happen when a record has received all necessary approvals?
  - ✔ What should happen when a record has been rejected?

Although it may be nice to automatically shepherd an approval process through to the right people, make sure your business process is fairly rock solid. For example, are the bottlenecks you face today in your approval process going to disappear, be reduced, or remain if the process is automated? If Philip is the busy executive who needs to approve all the expense reports but he doesn't manage his e-mail inbox well, you'll have to carefully set expectations about what efficiency gains you'll get with automated approvals.



## Chapter 22

# Extending Salesforce beyond CRM with Custom Cloud

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### *In This Chapter*

- ▶ Understanding Custom Cloud 2 and the Force.com platform
  - ▶ Creating Custom Cloud 2 apps on Force.com
  - ▶ Deploying Custom Cloud 2 apps for your company
- 

**W**hat if you could modify your business applications in minutes to match the unique ways you manage your customer relationships? How much more productive could you be if you spent less time fighting your technology — and more time with your customers?

*Force.com* is the Salesforce platform you use to customize and create on-demand applications by simply pointing and clicking your mouse on easy-to-use Web pages. In fact, with *Force.com*, you can not only customize your existing Salesforce applications but also now build entirely new Custom Cloud 2 applications to fit the way you do business. If you need a little inspiration, you can also install a pre-existing solution from the *Force.com* AppExchange directory.

In this chapter, we demystify the *Force.com* platform and define some basic terms to give you a glimpse of the awesome power of creating custom apps. Then you see how to share your creation on the *Force.com* AppExchange ([www.appexchange.com](http://www.appexchange.com)). Finally, we offer simple and critical tips for preparing your deployment game plan.

## *Understanding the Force.com Platform*

As we mention, *Force.com* is the [salesforce.com](http://salesforce.com) on-demand platform: a suite of development tools for customizing, building, integrating, and installing business applications — and you don't need to build or maintain any infrastructure yourself.

Force.com is both a collection of customization tools as well as the underlying infrastructure that powers the Salesforce app that you use. The cool part is that over time, salesforce.com engineers have exposed parts of their secret sauce so you can use it, too, and they've also used these customization tools to build additional features onto Salesforce.

Briefly, here are some key terms to know:

- ✔ **Force.com:** The engine that makes Salesforce what it is today. It's the underlying technology that enables you to customize existing applications, create new ones (with or without any programming experience), integrate Salesforce with other company systems, and share these snippets online with others. This is what powers the Custom Cloud (see the next term).
- ✔ **Custom Cloud 2:** The latest generation of the subset of Force.com functionality with which you can build new apps for your company's private use, or to share with the public.
- ✔ **Apex code:** Another subset of the Force.com platform. The Salesforce procedural scripting language that allows users to create integrations between Salesforce and other systems. If you're technical, you now have the ability to build new objects, create triggers and classes, change the user interface to handle custom forms and interactions, use a Web services API, and all that techno-speak stuff.
- ✔ **Visualforce:** A subset of Apex. Another powerful technical capability that Salesforce provides with which you can customize the actual front-end page design and components of your custom application. You're no longer limited to Salesforce's default colors, visual design, and tab layouts.
- ✔ **Force.com AppExchange:** An online directory where you can quickly browse, try, download, and install apps that can instantly run alongside your existing Salesforce applications.



Salesforce.com frequently re-brands the names of its various offerings. The preceding terms are the most recent versions as of this book's publication. The underlying functionality, look, and feel that we discuss is still the same as we describe it.

Unless you're a developer (or a glutton for punishment), you don't need to know the technical ins and outs. What you do need to know is that Force.com enables Salesforce administrators to easily customize and extend their existing on-demand applications without requiring IT involvement. For building applications, which can take months with traditional software, you can point and click to quickly develop new applications in hours or days, completely integrated with your existing Salesforce CRM system.

To see all options available to you with building Custom Cloud apps, log in to Salesforce and follow these steps:

**1. Choose Setup → App Setup.**

The App Setup page appears. This page highlights all the features and functionality available to help you customize, build, share, and integrate your CRM.

**2. On the sidebar menu, notice the menu items below the App Setup header.**

This chapter focuses on the tools listed under the Create header. We cover the Customize heading in Chapter 21. We don't discuss Develop because that's a more technical discussion, and we promised you "no code required."

## Preparing Your Custom Cloud 2 Strategy

Custom Cloud 2 places so much potential at your fingertips that just like a kid in a candy store, you may have the urge to just jump in and start building custom objects and tabs — a baptism by fire. Although that method is appetizing in theory, it's a quick way in reality to get a stomachache. Resist that impulse until you review these simple steps for planning your strategy for on-demand applications:

**1. Define and prioritize objectives.**

Your wish list doesn't need to be very involved, but it should spell out the who, what, when, why, and how.

**2. Build a plan.**

With agreed-upon objectives, take your project down another level and lay out a plan to address the most pressing objectives.

**3. Determine the most suitable approach.**

You have many different ways to tackle a business issue with Custom Cloud 2 — some better than others.

- *Use the discussion boards* at the Salesforce CRM Community Web site (<http://sites.force.com/answers>) to check existing or upcoming functionality. You may not need to build a unique solution.
- *Browse Force.com AppExchange* to see whether any available pre-built applications meet your general requirements.

**4. Keep it simple.**

Don't sacrifice your objectives at the expense of simplicity — although at the beginning, simple is often better.

5. Start with the end in mind.

If a custom app seems like the right strategy, figure out what it is that you want to measure.



A great way to design your application so that it takes full advantage of relationships is to simply draw it out on a piece of paper or a whiteboard. Your design doesn't have to be fancy or complicated, but it should define the standard and custom objects you need and how they should be linked.

## Creating Custom Apps with Custom Cloud 2

After you sketch the basic requirements for your new application, you're ready to begin building. A good place to start is to simply create the custom app, much like a container, before you add your objects and tabs.



To see an example of custom apps that others have created, visit the AppExchange (<http://sites.force.com/appexchange>) and look for apps under its Native Apps section. Apps created by Force.com Labs are those that came from within salesforce.com's own employees!

Choose Setup⇒App Setup⇒Create to get to a powerful set of customization tools that can empower your business faster than the status quo of traditional software solutions.

## Setting up a custom app



Many companies want internal branding for their business applications. Before you can apply branding like this, though, you have to first add the logo to a public folder on the Documents tab. (From any page, click the Documents tab, create a new public folder that's easily identifiable, like *Logos*, and click the New Document button from within that folder.) Make sure the image is a GIF or JPEG file smaller than 20K. Ideally, use a horizontally oriented image. If it's larger than 300 pixels x 55 pixels, Salesforce will scale the image to fit the space.

To add the custom app, choose Setup⇒App Setup⇒Create and then follow these steps:

**1. Click the Apps link from the sidebar.**

The Apps page appears. You see a list of your standard Salesforce apps, plus any custom apps you created.

**2. Click the New button above the Apps list.**

The first step of the New Custom App Wizard appears.

**3. In Step 1 of the wizard, enter a name and description for your app, and then click Next.**

The name you type in the label field will appear on the Force.com Apps pull-down menu.

**4. In Step 2 of the wizard, assuming that you want to apply your branding, insert a logo from your Documents tab. Then click Next.**

You have to first add the logo to a public folder on the Documents tab.

The logo will appear as the header whenever a user selects the custom app from the Force.com Apps menu. Of course, if you don't want to brand the app, you can leave the current Salesforce-provided image.

**5. In Step 3 of the wizard, select the tabs that will make up your app. Then click Next.**

You do this step by simply clicking tabs from the Available Tabs box and using the arrow buttons to create your list of Selected Tabs.

If you haven't created all your custom tabs yet, don't worry. As you create custom tabs, you can associate them with your custom or standard apps. (For all the details, see the section "Creating custom tabs," later in this chapter.)

**6. In Step 4 of the wizard, select the check boxes to assign the app to different user profiles.**

You want to make sure that the right apps are available to the right people in your organization.

**7. When you're done, click Save.**

The Apps page reappears, and your new custom app now appears on the list.

## *Building your custom objects*

Typically, you create a custom object to house a discrete set of information that's different from what is contained in other standard objects. For example, an Opportunity object contains opportunity information. A Custom Expense object contains information about expenses that's unique from the typical purpose of other standard objects.

If you want to build a home, you have to add the basic building blocks first. The same analogy applies to custom apps and objects. For example, if you want to build a recruiting application, you might decide that you could use

the Contacts object for applicants and need to build custom objects for Job Postings and Interview Feedback because they're distinct blocks of data.

To set up a new object, follow these steps:

**1. Choose Setup⇨App Setup⇨Create⇨Objects.**

The Custom Objects page appears. This page, your starting point for creating an object, is where all your custom objects are displayed.

**2. Click the New Custom Object button.**

The New Custom Object page appears.

**3. In the Custom Object Information section, type the basic details for your object.**

You usually just need to fill out the Label and Plural Label fields. This will then automatically populate the Object Name field. Labels are what your end users see (like "Time Off Request"). The object name is what Force.com sees (like "Time\_Off\_Req") in case you need to have another system (or another part of Salesforce) talk to it.

**4. Complete the Enter Record Name Label and Format fields.**

The record name appears on page layouts, related lists, lookups, and search results. This is what you use to differentiate one record of this object from another. Depending on the type of object you're creating, you may want to switch the data type from Text to Auto Number.

Here's how to tell when to use text versus auto numbers:

- *Text*: The name has some intrinsic value.
- *Auto numbers*: You're creating an object that will relate to other standard objects in a fundamental way.

Auto Numbers are useful for sequenced business documents, such as invoices (INV-001, INV-002, INV-003, and so on), purchase orders, IT tickets, and timecards.

**5. Select the custom object's optional features.**

With simple pointing and clicking on your part, Custom Cloud 2 allows you to select your custom object's features that are identical to many of the features found on standard objects, such as tracking activities, allowing reporting, or allowing notes and attachments to be added.

**6. Leave the Deployment Status as In Development so only you can see it, instead of all the other Salesforce users within your company.**

We recommend making sure you can explain the business process around using the new object *before deploying it* to help guide correct adoption.

Select the Deployed button if you're ready for your users to begin using it. If you wait to deploy the app, return to this screen by choosing



Setup⇨App Setup⇨Create⇨Objects. Select your object from the list of custom objects, and you return to the custom object detail page.

**7. Select the Launch New Custom Tab Wizard check box and then click Save.**

The New Custom Object Tab Wizard starts. See the section “Adding a tab to a custom object,” later in this chapter, for the how-tos on building a new tab.



If you already mapped the custom objects that will be part of your app, create all the objects first before modifying them. This action is especially helpful if you're building relationships between them.

## *Modifying custom objects*

Designing your custom object is as simple as modifying a contact record or adding to a contact record's related lists. If you need to change the basic settings, simply click the Edit button at the top of the Custom Object page for the object, and the New Custom Object Wizard reappears.

If you want to customize your new object, you can point and click through the related lists on the page.



Certain Setup features — including custom profiles, multiple page layouts, record types, workflow, and field-level security — are available only in Enterprise and Unlimited Editions.

## *Building relationships*

One primary reason for building applications with Custom Cloud 2 is to create a single, integrated, one-stop shopping experience for your users.

The key to those linkages is building custom relationships between objects. For example, if your company wants to manage account planning in Salesforce, you want to create a relationship between the standard Account object and a custom object for the Account Plan.

To build a relationship, follow these steps:

**1. Choose Setup⇨App Setup⇨Create⇨Objects.**

The All Custom Objects page appears.

**2. Click the desired custom object under the Label column.**

The Custom Object page appears.

3. Click the **New** button on the Custom Fields & Relationships related list (see Figure 22-1).

The New Custom Field Wizard appears.

**Figure 22-1:**  
Create a  
new custom  
field or  
relationship.

Action	Field Label	Data Type	Controlling Field	Modified By
Edit   Del	Average Rating	Formula (Number)		Lic.Ram, 5/15/2018 10:33 AM
Edit   Del	Candidate	Lookup(Candidate)		Lic.Ram, 5/15/2018 9:38 AM
Edit   Del	Candidate Label	Long Text Area(255)		Lic.Ram, 5/15/2018 9:38 AM
Edit   Del	Number of Reviews	Roll-Up Summary (COUNT Review)		Lic.Ram, 5/15/2018 10:33 AM
Edit   Del	Position	Lookup(Position)		Lic.Ram, 5/15/2018 9:38 AM
Edit   Del   Restore	Status	Picklist		Lic.Ram, 5/15/2018 9:38 AM
Edit   Del	Total Rating	Roll-Up Summary (SUM Review)		Lic.Ram, 5/15/2018 10:32 AM

4. In Step 1 of the New Custom Field Wizard, choose the type of relationship with another object.

Custom Cloud 2 supports two types of custom relationships: Master-Detail and Lookup. They're both one-to-many relationships.



A Lookup relationship links one object to another. The representative custom field will have a little magnifying glass icon next to it, so you can “look up” a value from that related object in order to associate with another object. Master-Detail (also known as parent/child) relationships are a special type of association: The relationship is required for the detail, and the value can't be changed after the association is made. If you delete the master record, its related children are also deleted.

The two relationships look the same in the user interface — as a lookup field with a magnifying glass on the record side and as a related list on the related object.

But here are two big differences:

- Master-Detail relationships cause the cascade deletion of child records to occur when the parent record is deleted. For example, if you delete an account, all related records are also deleted.
- In a Master-Detail relationship, the detail record inherits the Owner and sharing rules of the master record. Detail objects are dependent on their masters. In Lookup relationships, however, they don't transfer sharing rules — they're completely independent.



When you're in doubt, start with the Lookup option.

5. Click **Next** to continue. In Step 2 of the wizard, select the other object that you want to relate your object to.

You can create as many as five Lookup relationships with a custom object.



6. **Click Next to continue. In Step 3 of the wizard, enter the label for the lookup field.**

As a default, Custom Cloud 2 prefills the fields with the name of the object you selected although you can change it.

7. **Click Next to continue. If you have Enterprise or Unlimited Edition, set the field-level security in Step 4 of the wizard. (If you don't, skip to Step 9 because you won't be able to set field-level security.)**

If you chose the Master-Detail option, the security is set for you because it's locked to the profile. If you chose the Lookup option, select the appropriate check boxes to control visibility and edit rights to the field.

8. **Click Next to continue. If you have Enterprise or Unlimited Edition, in Step 5 of the wizard, select the page layouts in which you want to display the field.**

Suppose that you're creating an expense application. You may want the rep's layout to be different from the manager's layout.

9. **Click Next to continue. In Step 6 of the wizard, clear the check boxes if you don't want the custom object to appear on the related list of the selected object.**

For example, if you're linking expenses with accounts, you may not want a long list of expenses showing up on an account record.

10. **When you're done, click Save.**

The Custom Object page reappears, and your custom relationship is displayed on the Custom Fields & Relationships related list.



Build your relationships before loading any actual data.

Remember that between two objects, you can have only one object that allows the Master-Detail relationship, so the other object has to be a Lookup relationship.

Other ways that you can modify custom objects to fit your company's business processes include

- ✓ **Creating fields:** With Custom Cloud 2, you can quickly add fields to your custom object, much like you can with a standard object, such as an account or a contact. See Chapter 21 for more information on creating custom fields.
- ✓ **Adding custom links:** Adding custom links to an object can be a powerful way to extend your solution to a business issue. You can build custom links for custom objects, too. See Chapter 21 for more information on creating custom links.



- ✓ **Changing layouts:** After or as you build fields, feel free to start rearranging the page layout for the object record. Often, that's one of the easiest ways to get a pulse on what's missing from your record. See Chapter 21 for more information on editing page layouts.
- ✓ **Customizing related lists:** After you add your Lookup relationships and custom fields, you're ready to start customizing your related lists! Custom Cloud 2 allows you to modify the columns that are displayed on a related list.

Don't forget this step because without customizing this section, your users don't see much on a related list. When you add the right columns, though, the related list becomes a powerful tool for your users. By customizing the columns displayed on a related list, users can quickly see a summary of relevant information from a record's detail page. See Chapter 21 for more information on customizing related lists.

## Creating custom tabs

With Custom Cloud 2, you can create two types of custom tabs: custom object tabs and Web tabs. They look just like the standard tabs your users already use, and you can build the tabs in less than a minute — piece o' cake.

### Adding a tab to a custom object

If you read through the section “Building your custom objects,” earlier in this chapter, you've probably already built a custom tab. Sometimes, however, you build a custom object and decide later to add the tab.



Don't over-tab your application if it's not necessary. Ask yourself: “Will my users need all the object's data available from a central area?” If the answer is yes, you may need a custom tab.

To build a custom tab, follow these steps:

- 1. Choose Setup → App Setup → Create → Tabs.**

The Custom Tabs page appears.

- 2. Click New on the Custom Objects Tab related list.**

Step 1 of the New Custom Object Tab Wizard appears.

- 3. In Step 1 of the wizard, select the object from the picklist, and then use the Lookup icon to choose a tab style.**

The tab style affects both the color of the tab and the icon associated with a custom object record under Recent Items.

**4. In Step 2 of the wizard, select the desired tab visibility for your user profiles.**

With the radio button feature, you can control tab visibility to your profiles.

**5. In Step 3 of the wizard, select the apps to which the new custom tab will be available.**

This step makes it simple to associate custom tabs with just the right apps for your users.

**6. When you're done, click Save.**

The Custom Tabs page reappears with your new custom tab listed.

### *Building a Web tab*

In the normal course of a day, your users frequent other Web sites as part of their jobs. Here are just a few examples:

- ✓ Access an intranet
- ✓ Arrange travel plans
- ✓ Use an internal Web-based application

The list goes on. Why not make it easier for users to get to your business-related sites? With Force.com, you can build Web tabs that access Web applications and Visualforce.



We don't go into the details of Apex code or Visualforce because they require coding, but imagine that you have a particular form to which your teams are emotionally attached (a client profile form with four columns, for example). With Visualforce and the help of an experienced developer, you can display your data in Salesforce in unique formats (and keep everyone happy). To manage these features, choose Setup→App Setup→Develop.

To create a simple Web tab, follow these steps:

**1. Choose Setup→App Setup→Create→Tabs.**

The Custom Tabs page appears.

**2. Click the New button on the Web Tabs related list.**

Step 1 of the New Web Tab Wizard appears.

**3. In Step 1 of the wizard, click a button to select a layout.**

**4. In Step 2, define the content and properties.**

In this example, we show you how to create a URL-based Web tab for news labeled Company News.

**5. In Step 3 of the wizard, enter a URL and add any additional merge fields.**

Embedding merge fields is easy after you get the hang of it. For example, this URL is the standard search results URL from Yahoo News:

```
http://search.news.yahoo.com/search/news/?p=salesforce&c=
```

We copied and pasted the URL in the Button or Link URL box. Then we used the merge field tool for `{!Org_Name}` and put that in place of `salesforce` in the URL.

**6. In Step 4, click the drop-down lists to control which user profiles can access the tab, and then click Save.**

## Sharing Apps on AppExchange

As customers, employees, and partners began building custom applications (or *apps*), some bright person came up with an idea: Wouldn't it be great if other customers like you could simply try, download, and install these custom apps without having to build them on their own? iTunes uses the Web to distribute music, so why shouldn't enterprise applications work the same way?

Enter *AppExchange*, the Web site owned and operated by salesforce.com where you can try, download, and quickly install apps that can extend the value of Salesforce to meet your unique needs. You can even use the AppExchange to share your custom apps.

Of course, the biggest benefit beyond how much easier your life will be is the impact on your users. The AppExchange marketplace isn't just about easy sharing — it's about your employees using integrated business apps with all your information in one place.



Customers, partners, and salesforce.com personnel can all provide AppExchange with applications. Many of them, particularly the ones published by salesforce.com employees, are free to install and use. Others, such as the ones provided by partners, may have a fee associated with them.

## Browsing AppExchange

Downloading music and video from the Web seemed revolutionary just a few years ago, but now we take it for granted. But downloading enterprise apps? Wow, that seems like a whole 'nother animal.

Yet, when you get down to it, AppExchange is still about the exchange of a package of goods from one party to another. As with many innovations, getting the most out of a new system usually amounts to understanding some basic terms and knowing your limits before jumping in.

Here are five key things you should know before you get started:

- ✓ *Installation* is the process by which you download, install, and deploy a custom app from AppExchange.
- ✓ *Sharing* is the process by which you package a portion of your customizations and make them available, either publicly or privately, on AppExchange.
- ✓ Although anyone can try out AppExchange, to install and share apps, you must have a Salesforce instance and have administrative rights to that instance. (Did we just hear a sigh of relief?)
- ✓ You can exchange many types of AppExchange components, not just custom apps, on AppExchange. You can exchange custom links, dashboards, Visualforce code snippets, and more.
- ✓ Some apps are self-contained — *native* — in Salesforce. They were built with Custom Cloud 2 and don't depend on other external applications. Other custom apps are *composite*. Such apps may look and feel like Salesforce apps but connect with other services not owned by salesforce.com. *Caveat emptor* (let the buyer beware).

Familiarize yourself with AppExchange at <http://sites.force.com/apexchange> and then try out some apps before you decide whether you want to use them.

## Installing Custom Cloud 2 apps

If you want to install a custom prebuilt app, you can do it in a matter of simple clicks. This process amounts to first downloading the package, installing the app into your instance of Salesforce, and deploying it to all or a portion of your users.



A *package* refers to all the components that make up the custom app. A package may include custom tabs and objects, custom links, custom profiles, reports, dashboards, documents, and more.

To install a Custom Cloud 2 app, follow these steps:

1. **Click the Get It Now button on the app's detail page in AppExchange (at <http://sites.force.com/apexchange>).**

- 2. Answer some basic questions in the pop-up box to confirm that you're a Salesforce administrator who can download this into an instance of Salesforce. Then, log in to that instance.**

The Confirm Installation page for the custom app appears. This is the first step in the Install Wizard.

- 3. Check the box after reviewing the terms, and then click Install.**
- 4. Verify your password again in the pop-up box that appears.**

The Package Installation Details page appears.



If you're experimenting with the AppExchange for the first time, you may want to consider using the Sandbox Edition or a free Developer Edition instance to install, customize, and test the custom app.

- 5. Examine the package components, and then click Continue.**

This page summarizes the custom app's details, including objects, fields, tabs, reports, and dashboards.

Make sure that you examine the contents of a package thoroughly before proceeding. You may see a next page that shows you the package's API access to various objects, including details of what permissions the package will have on what objects.

- 6. Select a radio button to choose the security settings and then click Next to continue.**

This Package Installer Wizard allows you to choose either standard or custom security settings to meet your comfort level. We recommend that you choose the Select Security Settings option to start.

After choosing the Select Security Settings option, a Customize Security page appears.

- 7. Specify the level of access for each profile.**

The access levels here determine the layout assignments, field-level security, and other fun stuff such as editing permissions for the custom objects in the package. Access levels set here don't affect those of any existing objects you have.

Any standard profiles will have full access to custom objects in this package because permissions aren't editable for them. The only exception is the Read-Only profile, which will still maintain (duh) read-only permissions.

- 8. Click Next to continue. In the last step of the wizard, click the Install button.**

A progress page appears as installation begins. An Install Complete page appears after the installation finishes. Bet your traditional software can't create a whole new app that fast!

**9. Click OK.**

At this point, you can choose to deploy the app immediately to users or further customize it. We suggest you click OK to confirm the download and begin prepping some dummy data before you deploy this to users.

The Package Details page for your newly downloaded custom app appears. It shows the package components. If you check out the upper-right corner, you'll notice that the Force.com Apps menu now contains a listing for your new app.



After you install the app, you can use Custom Cloud 2 to modify its tabs, objects, and other customizations, just as though you had built the custom app yourself. Even though you've installed the app, it's not available to non-administrators until it's deployed.





## Chapter 23

# Migrating and Maintaining Your Data

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### *In This Chapter*

- ▶ Understanding your migration options
  - ▶ Executing your migration plan
  - ▶ Organizing your data
  - ▶ Getting help
- 

**I**f you're a system administrator, often your greatest headache isn't configuring or customizing the system but getting your data in and maintaining it so that it's useful. Nothing hurts a rollout more than complaints from users that their customer data isn't in Salesforce, that information is duplicated in several records, or that the information is wrong. Your end user adoption suffers if you don't maintain your records after the rollout. If you're not diligent, you can find yourself in the same mess that drove you to Salesforce in the first place.

If data maintenance is giving you nightmares, use the data management tools in Salesforce to easily import leads, accounts, and contacts. If you have in-house expertise or engage Salesforce professional services, you can migrate other critical data (such as opportunities, cases, and activities) by using proven third-party tools. When your data is stored in Salesforce, you can rely on a variety of tools to help you manage and maintain your database.

In this chapter, we first discuss your options for data import. Then, we show you how to use Salesforce tools to manage your data (including mass-transferring, deleting, and reassigning data). Finally, we touch on advanced concepts, such as mass-transferring and mass-deleting your data. Complex data migration and updates of data between your data sources and Salesforce are beyond the scope of this book, but we make sure to point you in the right direction.

## Understanding Your Options for Data Migration

Salesforce has easy-to-use wizards that step you through importing your campaign updates, leads, accounts, and contacts. If you're a system administrator or have the right profile permissions, you can perform these tasks for your users. For other legacy data (such as opportunities, cases, and activities) that you want in Salesforce, you have to enter information manually or use the *Data Loader*, which is an included ETL (extract, transform, and load) tool that comes with Enterprise and Unlimited Editions to automatically migrate data into Salesforce. Professional and Team Edition users can enlist the help of salesforce.com professional services.

### Using import wizards

Import wizards for leads, accounts, contacts, solutions, and custom objects are conveniently located under the Data Management heading in the Administration Setup section of Setup. If you're an administrator, you also see links to the import wizards in the Tools section of certain tab home pages. For example, if you want to import your company's leads, click the Leads tab, and then click the Import Leads link in the Tools section. Steps and tips for each of the import wizards are detailed in relevant chapters of this book, as follows:

- ✓ **Import leads:** Only a user with the Import Leads permission can perform this operation. See Chapter 9.
- ✓ **Import contacts and accounts:** Salesforce provides one wizard that can take you through importing contacts and/or accounts. Individual users also have the ability to import their personal contacts and accounts. See Chapters 4 and 5.
- ✓ **Import campaign leads or update contacts or leads linked to a campaign:** Salesforce provides a Campaign Member Import Wizard to update marketing statuses for leads and contacts. See Chapter 13.

### Investigating the Data Loader

Data migration is a tricky matter. The *Data Loader* is a small client application that helps bulk-import or export data in comma-separated value (.csv) format. You access this tool by choosing Setup⇨Administrative Setup⇨Data Management⇨Data Loader. With this tool, you can move data into and out of

any type of record in Salesforce, including opportunities and custom objects. The Data Loader supports inserting, updating, deleting, and extracting Salesforce records.

Several vendors also provide proven ETLs that enable you to migrate records to (or from) Salesforce and append those records where appropriate.



Without getting too technical, experts link data by using the Force.com API (application program interface) to enable your technical resource to access data programmatically. Force.com ([www.salesforce.com/developer](http://www.salesforce.com/developer)) is the platform used to customize or integrate Salesforce to do even snazzier things than what you can do with it out of the box. And before you suffer from jargon overload, a *platform* is basically a collection of rules and commands that programmers can use to tell a program — Salesforce, in this case — to do certain things. To access the Force.com API, though, you must have Enterprise or Unlimited Edition.

## Migrating Your Legacy Data

During the preparation phase of your implementation, you need a well-thought-out and documented plan for your data migration strategy. That plan needs to include details on objectives, resources, contingencies, and timelines based on the different steps in your plan. In the following sections, we discuss some of the steps that you should consider.

### Determining your data sources

The companies we've worked with typically have some type of existing contact management tool; a variety of spreadsheets with other customer data; and often, contact information living in users' Microsoft Outlook applications (not to mention Word documents and sticky notes). As you go through your preparation, assess what and how much information needs to be in Salesforce. Here are some tips for this step:

- ✓ **Garbage in, garbage out.** When you move into a new home, you usually look through your old home's closets and decide what to haul with you and what to throw away. Moving data requires the same type of evaluation.
- ✓ **Make a list.** Catalog the different data sources, including what types of records, what range, and how many.
- ✓ **Design a storage plan.** Work with your customer relationship management (CRM) project team to determine where different information should go — and why.

- ✔ **Think about the timing and the sequence of the import.** For example, many companies create user records first; then import accounts and contacts; and finally, migrate and append opportunities.
- ✔ **Keep it simple, if possible.** The more complicated you make the migration, the greater the impact on your timeline. Assess the level of effort versus the potential value of the effort.

## *Preparing your data*

Clean it now, or clean it later. Some project teams like to “scrub” data before importing it into Salesforce. Identifying and merging duplicates make finding the right record easier. Fixing inconsistencies in your data, such as ensuring that all State/Province fields hold two-character abbreviations, makes reports more accurate. If your legacy system doesn’t make cleanup easy, you might prefer to bring all the records into Salesforce first and then use the Salesforce data management tools to clean data later. Regardless of when you do it, cleaning data is not glamorous work, but it’s gotta be done.

Here are a few tips as you prepare your data:

- ✔ **Export to a simple format.** Oftentimes, it’s easiest to export data to applications like Microsoft Access or Excel, with which you can delete columns, sort rows, and make global changes.
- ✔ **Strive to use standard naming conventions.** If different data sources refer to accounts by different names (for example, IBM versus International Business Machines), now is a good time to standardize naming.
- ✔ **Edit or add fields in Salesforce to support the migration.** For instance, if your pipeline reports track margin per opportunity, you need to build a custom Opportunity field to support margin data. Read more about this in Chapter 21.
- ✔ **If your existing data source has unique record IDs, migrate those IDs to a custom field.** You can always delete or hide the field at a later stage. Not only can this help you verify the accuracy of your migration, but those IDs might come in handy for integration (especially if you don’t plan to shut down the other data source).
- ✔ **Map your data columns to field names in Salesforce.** For example, the Company field in Microsoft Outlook typically maps to the Account field in Salesforce. Some system administrators even rename the column headers in migration files so that they exactly match field names in Salesforce. Doing this minimizes the migration madness.
- ✔ **Conform your data to fit Salesforce standards** (or the other way around). Each field in Salesforce has certain properties that might include size limitations, decimal points, date formats, and so on.

- ✔ **Add a Data Source column to your import file and map it to a custom field in Salesforce.** By doing this, you can defend where data came from.
- ✔ **Assign the correct owners to records wherever possible.** If you don't have all records assigned, the owner defaults to whichever administrator is executing the migration.
- ✔ **Gain acceptance from stakeholders of the files you've prepared.** At least, if you offer them the chance to review, you avoid surprises.

## *Testing the import*

Test before you execute the final migration. Often, you discover things that you missed or could improve. For example, fields can be mapped incorrectly, or you might just need to create some extra ones. Here are a couple of tips:

- ✔ **Select a small sample of significant records.** The more high-profile the records, the better — especially when reviewed by a stakeholder.
- ✔ **Review page layout.** Consider adjusting the page layouts to make validating the data import easier. Put fields in Salesforce in similar screen locations to those of your legacy systems.

## *Analyzing the test data results*

When your test data is in Salesforce, compare it carefully with your test file to ensure accuracy and completeness. Here are a few tips on how to productively analyze the test data results:

1. **Build.** Build a custom report that allows you to look at the record data collectively.
2. **Compare.** Open a record, if necessary, and compare it against the import file. Confirm that the record's fields show what you think they should show.
3. **View.** Build a custom view from a relevant tab home page to see your imported data laid out in columns on a list page. Users could go to a report, but a view keeps them focused.
4. **Validate.** Validate the data with selected stakeholders to get their feedback and support that the test data results look correct. It's not enough that you think the test import was accurate. Your end users are the ultimate test.
5. **Tweak.** Adjust your process or make changes to the import file or Salesforce based on the results of the test import. For example, maybe you forgot to map a field, or the data didn't import correctly because of a field's properties.

## *Migrating your final data*

After you successfully analyze the test data results, you're ready to import your file or files. (Yes, that's a simplification of what could be a complicated set of tasks, but the overall process is tried and true.)

Here are a few suggestions for this step:

- ✔ **Communicate expectations with your users.** If you're cutting over from one system to another, you might have a lapse in which data must be updated prior to going live.
- ✔ **Do it during downtime.** If you have significant data, consider running the migration during non-working hours. Especially if the system is live for some groups of users already, this might avoid confusion.
- ✔ **Build yourself some cushion for error.** Don't try to execute the migration the day before sales training. You never know whether something unanticipated might happen that prevents successful completion.

## *Validating and augmenting your data*

Similar to analyzing results of the test data (see the section “Analyzing the test data results” earlier in this chapter), when the data has been loaded, run reports to validate a cross-sampling of records to ensure accuracy and completeness. Make sure that data is stored in the correct fields and that values make sense. If you see an address in a phone field, you need to clean your data or fix your field mapping. Strive for perfectly imported data — but expect less than that, too.

Prior to rolling out Salesforce, take the extra step of manually or automatically updating some records to wow users and drive more success. When giving a demonstration or training, show users these fully entered examples and let them know the potential for Salesforce.

## *Managing Your Salesforce Database*

After you implement Salesforce, you need to make sure that you create processes for periodically updating and backing up your data. If you don't, human error can lead to frustration and heartache. Duplicate records, dead leads, records that need to be transferred when a user leaves the company — these are just a few examples of data that needs to be updated.

Most of the data maintenance tools are accessible from the Data Management heading located under the Administrative Setup heading on the sidebar of Setup. (See Chapters 4, 5, and 9 for details on de-duplicating accounts, contacts, and leads.)

## *Backing up your data*

If you have Unlimited, Enterprise, or Professional Edition, Salesforce offers a weekly export service of all your data that you can use to create a backup.

To export and back up your data, follow these steps:

1. **Choose Setup**⇨**Administration Setup**⇨**Data Management**. Click the **Data Export** link.

The Weekly Export Service page appears.

2. **Click the Export Now** button.

3. **Select the appropriate export file encoding from the Export File Encoding drop-down list and select the check boxes if you want to include attachments and replace carriage (hard) returns with spaces.**

If you live in the United States or Western Europe, you don't have to change the Export File Encoding selection.

4. **Specify which Salesforce objects you want to export, or just leave the default Include All Data check box selected.**

5. **When you're done, click the Data Export** button.

The Weekly Export Service: Export Requested page appears. You'll receive an e-mail from Salesforce with a link to a page where you can retrieve zipped .csv files of all your data. You have 48 hours to download your data, after which time the data files are deleted.

6. **When you receive the e-mail entitled Your Organization Data Export Has Been Completed, click the title to open the e-mail.**

The e-mail appears with a link to the page in which you can retrieve your data export.

7. **Click the link and log in to Salesforce, if required.**

The Weekly Export Service page appears, as shown in Figure 23-1.

You can also access the Weekly Export Service page by choosing Setup⇨Application Setup⇨Data Management⇨Data Export.



**Figure 23-1:**  
Down-  
loading  
your data  
export file.

Weekly Export Service [Help for this Page](#)

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export: 7/12/2010 12:00 AM

[Cancel Export](#) [Schedule Export](#)

Scheduled By	Matt Kaufman
Schedule Date	7/5/2010
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Action	File Name	File Size
<a href="#">download</a>	VWE_00D3000000091AJEAY_1.ZIP	20.3M

### 8. Click the **Click Here to Download This File** link.

A dialog box appears, allowing you to open or save your Zip file to a location accessible from your computer.

Although not required, we recommend that you schedule a routine data export of your data by selecting the **Schedule Export** button in the **Weekly Export Service** page (see Figure 23-1). This option follows the same steps as an immediate backup, but it also allows you to select when you want your backup to automatically occur.

## Mass-transferring records

A sales rep leaves. Sales territories get readjusted. You imported a file but forgot to assign records to the right owners in advance. These are just a few examples of when you might have to transfer records. Salesforce allows you to mass-transfer lead, account, and custom object records — and the processes for all three types are very similar.



When transferring leads or accounts, Salesforce automatically transfers certain linked records on the detail page.

- ✓ **For both leads and accounts:** All open activities transfer to the new owner.
- ✓ **For accounts:** All notes, contacts, and open opportunities owned by the existing owner transfer to the new owner.
- ✓ **For custom object records:** No linked records are transferred.

To mass-transfer records, follow these steps:

1. Choose **Setup** ⇨ **Application Setup** ⇨ **Data Management** ⇨ **Mass Transfer Records**.

A **Mass Transfer Records** page appears.



2. **Click the Transfer link for the appropriate type of record, depending on your needs.**

A Mass Transfer page appears with a set of filtering options to help you search for records. You can use the filters to specify the set of data that you want to transfer: for example, all Accounts with San Francisco in the Billing City field.



3. **In the Transfer From and Transfer To fields, use the Lookup icons to find the appropriate users.**

With leads, you can also transfer to or from queues. See Chapter 9 for details on lead queues.

4. **If you're mass-transferring accounts, select the check boxes to specify whether you want to transfer types of opportunities, cases, and teams.**
5. **Define additional criteria to filter your search by using the drop-down lists and fields provided.**

You do this by selecting a field from the first drop-down list, selecting an operator from the second drop-down list, and then typing a value in the field. For example, if you want to transfer all of one sales rep's New York City accounts to a new rep, your criteria would be

*Field:* City

*Operator:* Equals

*Value:* New York

6. **When you're satisfied with your settings and filters, click the Find button.**  
The Mass Transfer page reappears with a list of results.
7. **Use the check boxes to select the records that you want to transfer.**
8. **When you're done, click the Transfer button.**

The Mass Transfer page reappears when the transfer is complete.

## *Mass-deleting records*

If you're the administrator, you might want or need to mass-delete records. A couple of typical examples include deleting dead leads and eliminating accounts that haven't had any activity. Salesforce allows you to mass-delete leads, accounts, contacts, activities, cases, solutions, and products — and the processes are very similar.

To mass-delete records, follow these steps:

1. **Choose Setup → Administration Setup → Data Management → Mass Delete Records.**

The Mass Delete Records page appears.

**2. Click one of the Mass Delete links, depending on the type of standard record you wish to mass-delete.**

The Mass Delete Records page appears with a three- to five-step wizard for mass-deleting. The three-step wizard is shown in Figure 23-2. The Mass Delete Accounts page has two extra steps based on opportunities that are closed/won or that aren't owned by you. The Mass Delete Products page has one extra step to archive products with line items on opportunities.

**Mass Delete Leads** [Help for this Page](#)

**Step 1: Review what will happen when you mass delete your Leads:**  
This screen allows you to delete a list of Leads from salesforce.com. The following data will also be deleted:

- All Activities associated with the Leads

Once data is deleted, it will be moved to the Recycle Bin.

**Step 2: Recommendation prior to mass deleting:**  
We strongly recommend you run a report to archive your data before you continue.

It is also strongly advised to request and receive a weekly export of your data before running mass delete. The weekly export service is included with Enterprise Edition, and available for an additional cost with Professional Edition. Contact salesforce.com for more information.

**Step 3: Find Leads that match the following criteria:**

Created Date	less than	LAST YEAR	AND
Rating	equals	Cold	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 7/5/2010
- For date/time fields, enter the value in following format: 7/5/2010 9:04 PM

**Permanently delete**

Permanently delete the selected records. When this option is selected, you cannot restore deleted records from the Recycle Bin. Please be careful when selecting this option.

**Figure 23-2:**  
Select records for mass-deletion.

**3. Review the Salesforce warnings in Step 1 of the wizard.**

**4. Back up relevant data by generating a report and exporting it to Excel as part of Step 2 of the wizard.**

See Chapter 18 for details on building and exporting reports.

**5. Use the filters in Step 3 of the wizard to define criteria for the search.**

You do this by selecting a field from the first drop-down list, selecting an operator from the second drop-down list, and typing a value in the field.

You can see an example of this in the preceding section, “Mass-transferring records.”

**6. Click the Search button.**

The Mass Delete page reappears with a list of possible records at the bottom of the page. Do the following:

If you're mass-deleting *accounts*, you can do two things:

- Select the check box in Step 4 of the wizard if you want to delete accounts that have Closed/Won opportunities.
- Select the check box to delete accounts with another owner's opportunities.

If you're mass-deleting *products*, select the check box if you want to archive products with line items on opportunities.

If you're mass-deleting *another object*, proceed to Step 7.

7. Use the Action column to select records to be deleted.
8. When you're satisfied, click the Delete button.

A dialog box appears to confirm the deletion.

9. Click OK.

The Mass Delete page reappears, minus the records that you deleted.

## Getting Help with Complex Data Tasks

This chapter shows you some of the basic operations that you can perform to import and manage your data in Salesforce. For many companies that have complex data needs, this might be an oversimplification. If you need help with your data, here are some resources you can turn to:

- ✔ **Talk with your Customer Success Manager or account rep.** These folks can help define your needs and point you to the appropriate solution or resource.
- ✔ **Go outside.** If you're looking for outside help, contact the salesforce.com professional services team or a salesforce.com consulting partner. Your Customer Success Manager or account rep can put you in touch.
- ✔ **Check out offerings by partners on the AppExchange.** Go to [www.appexchange.com](http://www.appexchange.com) and choose the Data Cleansing subcategory under either the Sales or the Marketing category.
- ✔ **Talk to developers.** On the Force.com Developer site (<http://developer.force.com>), click the Discussion Boards tab to talk to a community of developers who have wrestled or are familiar with your data challenges. These boards are of a technical nature, but if this is what you're looking for, you might find it here.

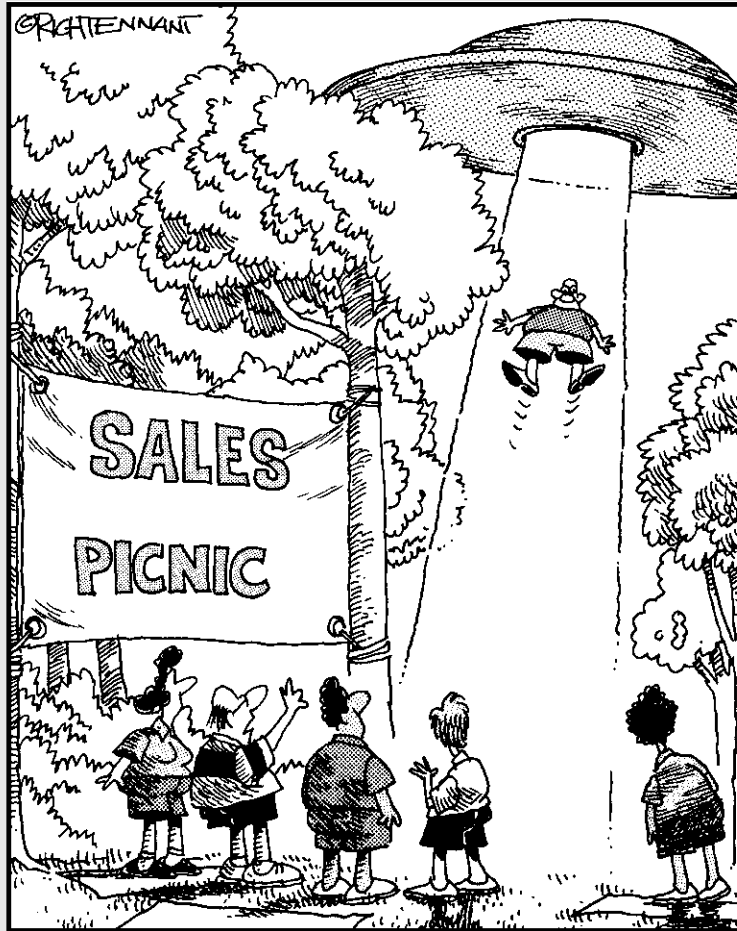


# Part VIII

## The Part of Tens

The 5th Wave

By Rich Tennant



"Get names!"

## *In this part . . .*

**T**he Part of Tens is a standard for all *For Dummies* books. We use this part to highlight certain lists that deserve a special place.

Anyone can have a tough time keeping up to speed with all the feature releases from [salesforce.com](https://salesforce.com). That's the aspect of cloud-based application that also keeps us authors on our toes. In the first chapter, we discuss ten great productivity tools worth their weight in gold. In the second chapter, we detail ten keys to a successful implementation. If you're an administrator, this is a must read.

## Chapter 24

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# Ten Ways to Drive More Productivity

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**S**alesforce.com drives much of its feature updates based on its existing roadmap and requests from customers just like you. A few times per year, salesforce.com comes out with a new release of its award-winning service. Unlike traditional software upgrades, these releases are immediately available to all customers — depending, of course, on which edition they use.

Keeping track of all the cool new updates that salesforce.com releases can get a little overwhelming. The speed with which they're able to roll out releases is often barely faster than our ability to write all about it and get it in print to you! On the flip side, perhaps you do keep track of the newest features but have been struggling with an apparent feature limitation or would like more advice on how to best implement a particular feature.

Fortunately for us, both salesforce.com and its community of users strongly believe in helping each other out in order to make every customer successful. Through a variety of channels, the salesforce.com community shares best practices and offers suggestions and workarounds for even the toughest, head-scratcher questions.

In this chapter, we summarize five essential resources that every user in your organization should know about. Then we cover five great productivity tools that you might have overlooked.

## *Finding the Top Five Resources*

Salesforce.com realizes that first you have to have healthy business processes before applying any type of CRM solution to them. Combine that with providing information at its customers' fingertips, and you have several resources available to you when you want to talk about all things Salesforce. In addition to providing answers to the perennial "How do I do this?" question, salesforce.com also focuses on topics covering your business processes to address the "Why would I want to do this?" question. Here, we highlight five resources that can make a big difference in informing you and your organization about the hows and whys of Salesforce features:

- ✔ **Salesforce.com blog (<http://sites.force.com/blogs>):** Whether you're an administrator or end user, bookmark this Web site *now*. Here you'll find a wealth of best practices information contributed by product experts across the company. Under the View by Type drop-down list in the left sidebar, select Best Practice.
- ✔ **Salesforce IdeaExchange (<http://sites.force.com/ideaexchange>):** The IdeaExchange is a forum in which you can recommend new product ideas, see what other users are requesting, and vote for the ideas most important to you. Not only do you get to see what the masses are clamoring for, but you also get to see salesforce.com employees, partners, and customers providing feedback in the IdeaExchange's forums. Then, even more satisfying, salesforce.com's product managers listen to everyone who posts and mark which features have been rolled into new releases.
- ✔ **Salesforce.com local user groups:** One of the best ways to learn about upcoming features, network with your peers, and provide product feedback is to join a local user group. You'll get to learn from and share tips with fellow customers in your vicinity. From Salesforce Community, click User Groups, or navigate to <http://sites.force.com/usergroups> via your browser's address bar. Look on the sidebar for the Join a Group Now section and drill down to see the participating cities. If you don't see your city, think about starting your own group.
- ✔ **Salesforce Training and Certification:** One of the best ways to become an expert and have an opportunity to ask an expert about your company's particular use of Salesforce is to be trained by salesforce.com. Then you can be your company's expert and spearhead further ideas of using Salesforce to make your business processes run smoother. There are classes for every user role, and for every budget. For those of you who will be configuring and customizing Salesforce, there are also a series of certifications so you can tell others just how special you are. Visit the salesforce.com Web site and look for Training under the Services link on the home page.
- ✔ **Salesforce.com Online Help topics:** Finally, if you're working in Salesforce and get stuck with a question, look for a Help for This Page link on that page. Clicking that link opens a new help window that's context sensitive.



## Revisiting Five Great Productivity Tools

Few companies make use of every feature when they first deploy Salesforce to their employees. It would be overwhelming to absorb, and you know that success is a function of end user adoption. So if you're like other CRM project teams, you tend to focus on addressing the core business objectives that often include lead, account, and opportunity management.

If this sounds like you, the following list includes five tools that we'd like to remind you about. Give yourself time to set these up — you can substantially boost adoption and productivity, depending on your objectives:

- ✔ **The AppExchange** ([www.salesforce.com/appexchange](http://www.salesforce.com/appexchange)): “If only we could use Salesforce to do this. . . .” Does that sound familiar? Well, your business pain may be someone else’s as well. Someone may have already built a solution for it. Head on over to the AppExchange marketplace to look for a custom app or component that already exists to help you. There are lot of free options, too!
- ✔ **Email to Salesforce**: Corporate e-mail isn’t going away anytime soon. Everyone in your company uses something like Microsoft Outlook, Lotus Notes, Gmail, or Yahoo! to manage e-mails. Oftentimes, only a subset of your employees are using Salesforce. With Email to Salesforce, your Salesforce users who live in both applications can reduce their administrative time by sending an e-mail in your third-party e-mail manager, and having that e-mail automatically archived in Salesforce under the matching lead, contact, or opportunity.
- ✔ **Online lead or case forms**: This is a classic feature in Salesforce that every customer should roll out. Capturing lead or case information via a form helps maintain consistency of your data, which will help you increase the accuracy of your reporting. Whether you roll this out in the first phase of your implementation is up to you, but it should be high on your list. See Chapter 13 for Web-to-Lead or Chapter 17 for Web-to-Case details.
- ✔ **Self-Service Portal**: Help your customers help themselves. This is one tried-and-true method of delivering great service and managing the workload in your support center. But how do you build a secure customer portal and quickly tie it in with your CRM application? With the Self-Service Portal, you can do this in hours, rather than weeks. To launch a Self-Service Portal, see Chapter 17.
- ✔ **E-mail templates**: This is a simple feature that can save your reps and marketing staff a ton of time. You no longer have to dig up an old e-mail, copy and paste it into a message, and scour the text for places where you should replace the old customer’s name. E-mail templates are easy to set up and help you send out professional-looking HTML or text e-mails that are personalized to your contacts. Create a few so your reps can begin using them on Day 1. See Chapter 8 for more information on how to use templates.



## Chapter 25

# Ten Keys to a Successful Implementation

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Several companies have rolled out customer relationship management (CRM) applications with the mistaken notion that you can buy the licenses, turn on the switch, and use the application as soon as you take it out of the box. Then, these same companies look back months later and wonder why they're not experiencing the results they envisioned.

Nine time out of ten times, the root cause is poor planning. No matter what size your implementation, building a strong plan and then executing the plan will substantially improve your chance of success.

Salesforce provides you the tools and a platform to enhance your business effectiveness and productivity. If you're involved in the rollout of Salesforce, this chapter gives you ten tips to help you do it successfully. Check out the free Webinars, answers, and more on the Salesforce Community site (<http://success.salesforce.com>) for more tips on leading a successful rollout.

## *Identifying Your Executive Sponsor*

Rolling out or replacing a CRM solution is a big deal. For some managers and reps, this initiative can cause concerns for a variety of reasons: People get set in their ways, they think it's Big Brother, they assume it's going to take a lot of their time, and so on. Sometimes other top priorities at work begin creeping in, and the importance of the CRM implementation falls along the wayside.

Every project needs a champion to help drive the CRM initiative in your company. That person is there to rally support, break logjams, and ensure that your team has the resources to get things done. We recommend that you identify an executive sponsor on Day 1 and work with her so that she can communicate what's in it for the implementation team and set expectations

for what's needed from all participants. This will go a long way in calming fears, gaining support and commitment, and nudging the team toward a decision when the team members are at an impasse.

## ***Building Your Project Team***

As you might have already figured out, CRM is less about technology and more about people, human processes, and your business. For your company to get the most out of Salesforce, you need to develop a team made up of critical stakeholders, Salesforce experts, and a cross section of end users. If you're implementing Salesforce for sales and marketing, that might mean that the team includes managers from marketing, sales operations, and IT, some respected sales reps, and hopefully a member of your executive team. This doesn't have to be a huge team, nor should members expect to be involved in this project full time. But you must have people who can speak for the business, and you must have sufficient resources to get the job done. Get every stakeholder to understand the team's objectives and to buy in from the first meeting.

## ***Evaluating Your Processes***

Conduct business process reviews as key elements to your planning process. Those meetings should include a key stakeholder (or stakeholders) who can speak for his business and to the CRM project team (for example, a channel sales session with the head of channel sales). By doing this, you gain further agreement to your plan and ensure that you're building a solution that meets existing or desired processes of managers and their teams.

## ***Gathering Requirements***

Think about why you are implementing Salesforce. Is it to increase sales, improve productivity, encourage collaboration, or all three? Because it's nearly impossible to implement anything correctly unless you know your goal, make your objectives measurable by applying specific success metrics to an objective. (A *success metric* is a numerical goal that you want to achieve, ideally within a specified time frame.) For example, it's one thing to say you want to reduce customer service response time, and it's quite another to define that you want to reduce response time by 20 percent by the end of the year. It's important to choose the right metric to measure your company's progress.

## *Defining Your Scope and Prioritizing Initiatives*

You can do a lot with Salesforce, but the more complex, the longer the implementation will likely take and the greater the chance you'll hit a snag. As you collect the requirements of key stakeholders, prioritize initiatives and determine what's in scope and out of scope for the initial implementation. Consider keeping the implementation limited by focusing on the major priorities. Then, you can extend your initiatives by building on prior success.

## *Modeling Salesforce to Your Business*

After you evaluate your company's business processes and gather scope requirements from your steering committee, you next want to model Salesforce to your business. However, we realize that you're probably new to Salesforce and might have some questions as to what information should go where. For your company, what are leads, accounts, contacts, and opportunities? Make sure you check out the various process maps on the Successforce Best Practices Web site (<http://success.salesforce.com>) before you start customizing Salesforce. If you still have some questions, make sure to ask your peers on the community forums or contact your Customer Success Manager for guidance.

## *Customizing for User Relevance*

When designing records and layouts, keeping it simple isn't always appropriate. Some businesses do have complex needs. Just be aware that long, complicated records can affect end user adoption, so don't build a field unless you think end users will use it. Focus your customization on relevancy to your users. Standardize information as often as possible, using picklists rather than free text fields, which will help with more accurate reporting. For fields that have to be text fields (such as the Opportunity Name), work out a simple standard naming convention.

As you accomplish major milestones (such as customization of different records or layouts), validate your work with a representative of your end users. By doing this, you can make sure at key points that you're building a solution that works for your internal customer.

## *Importing Clean Data*

Identify your data sources that you want to bring over to Salesforce. Note where the information is coming from, what format it will be in, and how clean it'll be.

Armed with this information, you can discuss with your team the scope of your migration. Moving into Salesforce means that it's time for some spring cleaning. Work with your team to identify which data sources are the most valuable and whether your end users will benefit from all that information coming over. Remember that data that doesn't make it to Salesforce doesn't necessarily disappear. You can always archive it or keep it in the legacy system.

After you decide what data is going into Salesforce, you have to clean it. Scrubbing data isn't glamorous, but it has to be done. Reducing duplicates and ensuring consistency not only make Salesforce more valuable but also improve your user's adoption. If you don't have the resources to do this, check out the AppExchange ([www.salesforce.com/appexchange](http://www.salesforce.com/appexchange)) for partners that help with data cleansing.

## *Building a Comprehensive Training Plan*

As early as you can in the implementation process, start building a training plan. Don't assume that users will know what to do. And don't just rely on the generic sales training offered by Salesforce; it might not be relevant enough to your customization. Blend prerequisite classes, custom sales training, and reinforcement training in your plan. The key is to make sure that enough relevant training is provided so that people effectively and correctly use the Salesforce application. Also, be sure that your end users have personal copies of *Salesforce.com For Dummies*. Just in case.

## *Connecting with Peers*

After your teams are up and running with Salesforce, you should constantly gather feedback and track how adoption is faring. Also, get out there and meet your peers — others who have rolled out Salesforce and have advice and stories to share. Through online community discussion boards, local user group meetings, and Dreamforce (the salesforce.com annual user conference), you have several channels where you can ask questions, seek guidance, and share information that can help you take your Salesforce implementation to the next level.

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