Teach Yourself VISUALLY™

Salesforce.com

The Fast and Easy Way to Learn

Second Edition

Justin Davis, Richard Wentk

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Teach Yourself VISUALLY™

Salesforce.com®

Justin Davis and
Kristine Curington

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Sr. Vice President,
Worldwide Alliances & Channels, Salesforce

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Kristine Curington: Thank you to Justin Davis and to the team at Wiley for the opportunity to participate in this project.

How to Use This Book

Who This Book Is For

This book is for the reader who has never used this particular technology or software application. It is also for readers who want to expand their knowledge.

The Conventions in This Book

1 Steps

This book uses a step-by-step format to guide you easily through each task. Numbered steps are actions you must do; bulleted steps clarify a point, step, or optional feature; and indented steps give you the result.

2 Notes

Notes give additional information — special conditions that may occur during an operation, a situation that you want to avoid, or a cross reference to a related area of the book.

3 Icons and Buttons

Icons and buttons show you exactly what you need to click to perform a step.

4 Tips

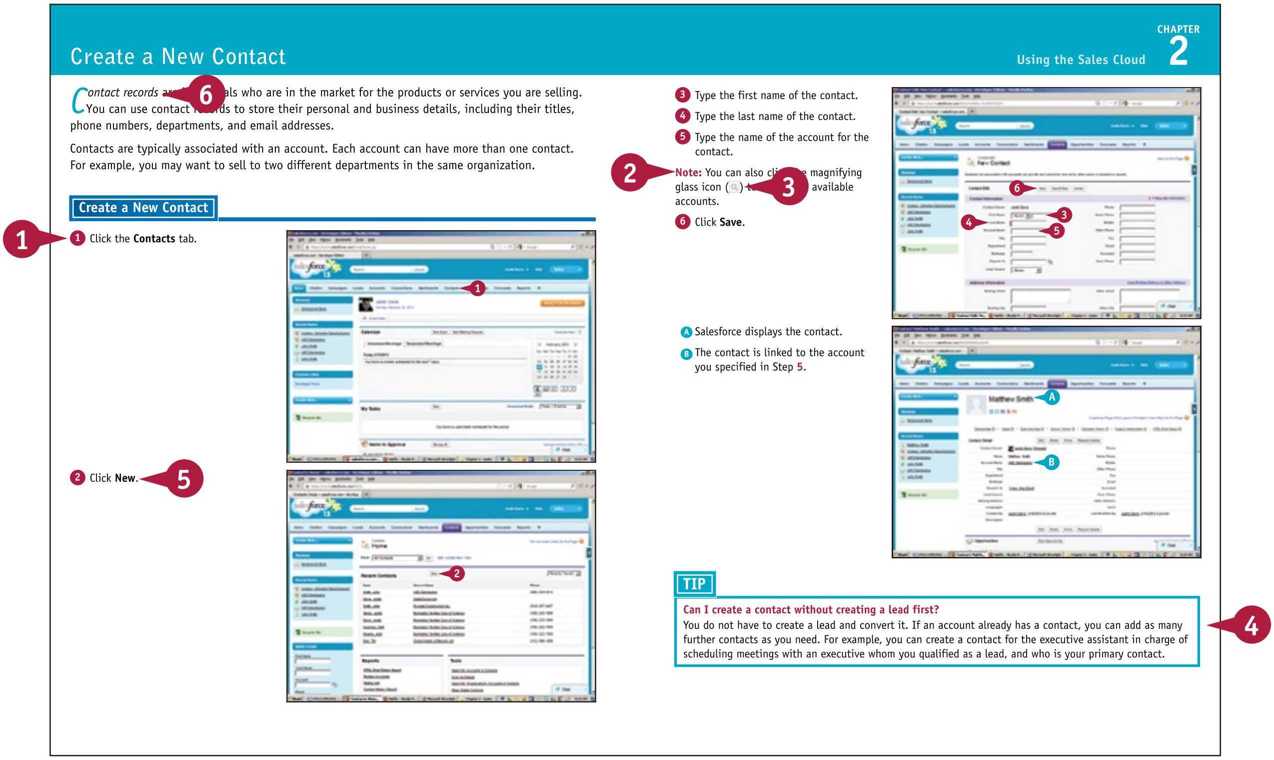
Tips offer additional information, including warnings and shortcuts.

5 Bold

Bold type shows command names, options, and text or numbers you must type.

6 Italics

Italic type introduces and defines a new term.


CHAPTER 2

Using the Sales Cloud

Create a New Contact

Contact records ar… als who are in the market for the products or services you are selling. You can use contact …rds to store their personal and business details, including their titles, phone numbers, departments, and email addresses.

Contacts are typically associated with an account. Each account can have more than one contact. For example, you may want to sell to two different departments in the same organization.

Create a New Contact

1 Click the **Contacts** tab.

2 Click **New**.

3 Type the first name of the contact.

4 Type the last name of the contact.

5 Type the name of the account for the contact.

Note: You can also cli… magnifying glass icon ( ) t… available accounts.

6 Click **Save**.

A Salesforce displays the contact.

B The contact is linked to the account you specified in Step 5.

TIP

Can I create a contact without creating a lead first?

You do not have to create a lead and convert it. If an account already has a contact, you can add as many further contacts as you need. For example, you can create a contact for the executive assistant in charge of scheduling meetings with an executive whom you qualified as a lead, and who is your primary contact.

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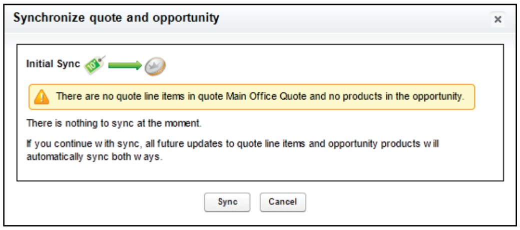

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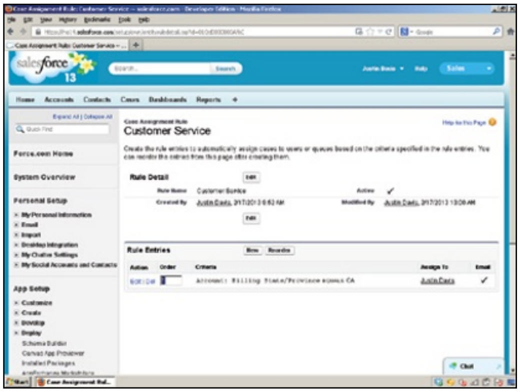

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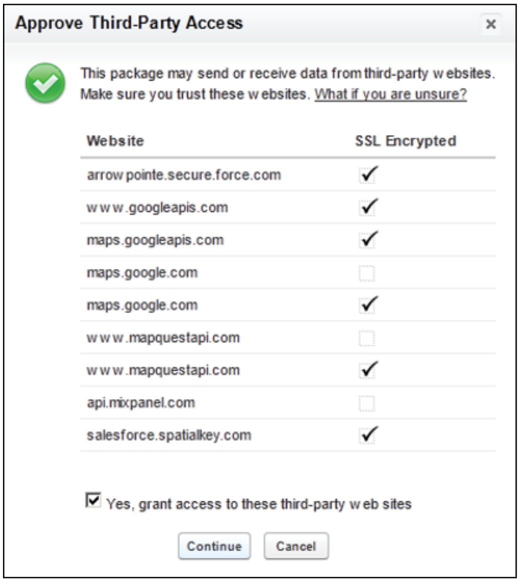

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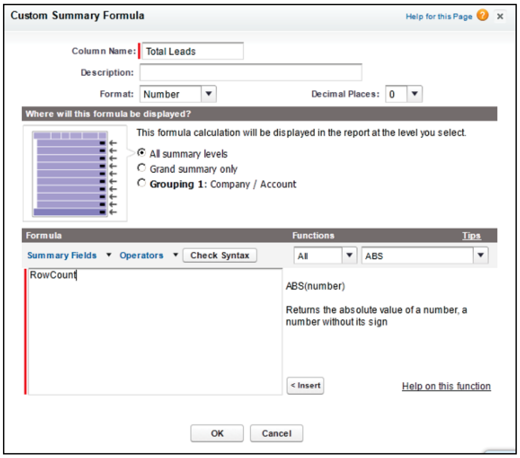

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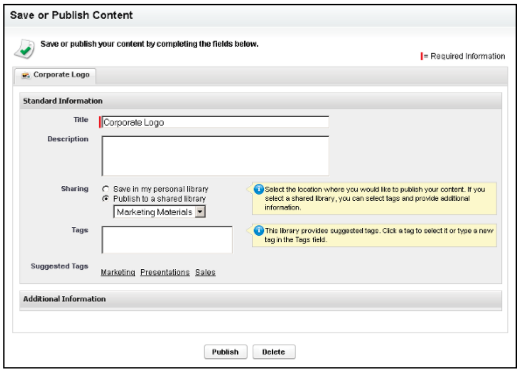

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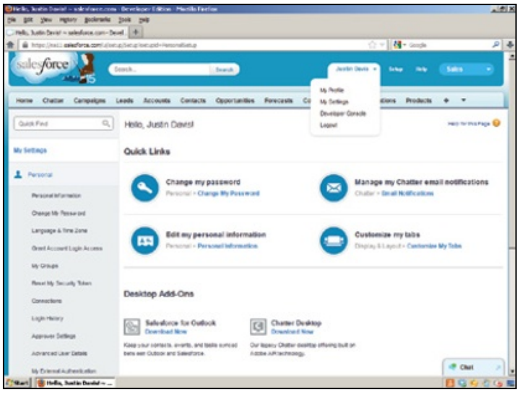

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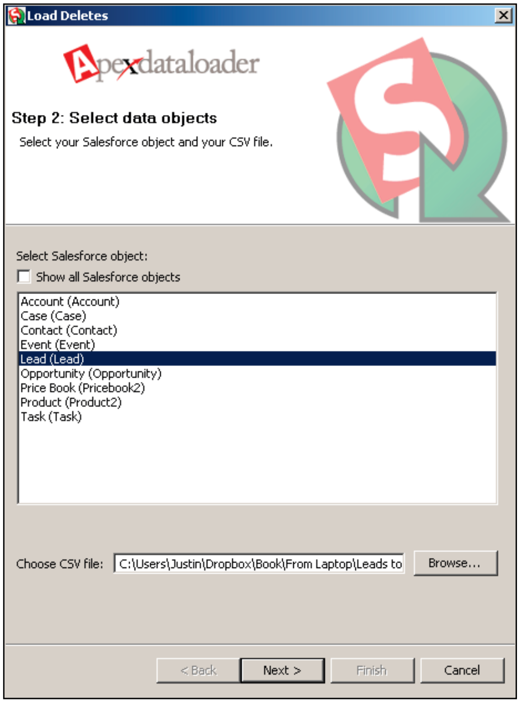

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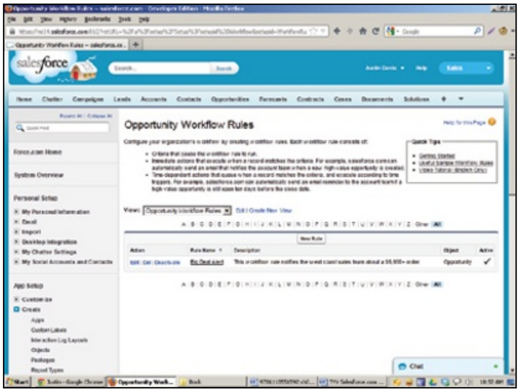

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Foreword

At Salesforce I have the responsibility — and the pleasure — to work with all our amazing partners who are driving innovation and customer success around the world. Partnering with Salesforce, our Applications Partners can build apps faster with the Salesforce1 Platform and market them on the AppExchange — the number one enterprise applications marketplace. Our Consulting Partners have likewise built thriving practices focused on transforming their customers' businesses, leveraging the world's leading Customer Success Platform.

Salesforce allows users to track customer information and interactions all in one place. Companies can create 1:1 journeys, building relationships from click to close with continuous campaign optimization across every channel. Chatter allows users to find assistance and share ideas. Service teams can rise to the expectations of today's customers who demand 24/7 support and guidance. Salesforce Communities breathes new life into customer portals with Chatter, Knowledge, Ideas, and more. Salesforce Analytics Cloud lets business users analyze data, get answers instantly, and share with their teams. The Salesforce1 Platform has the tools and services to build custom apps that deepen customer relationships and help employees do more, faster. Finally, with the Salesforce1 Mobile App, everyone in the organization can run his business from his phone.

And we are constantly investing in technologies that enable our customers and partners to move from idea to innovation as quickly as possible, and we welcome innovation from across our ecosystem of partners and customers. The first edition of this title is highly praised for its thoroughness as well as its ease of use. It deftly bridges the gap between manual texts and in-person instruction.

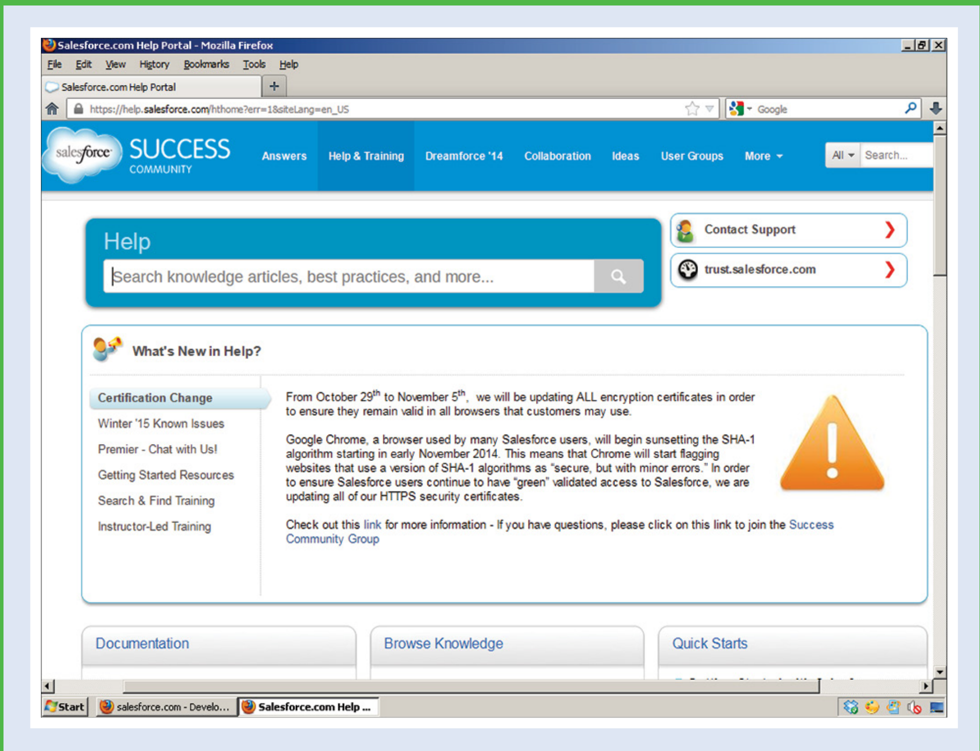
With the second edition, Justin and Kristine have developed an exceptional approach to visually explaining the power of the Salesforce Customer Success Platform. If you are interested in learning more about Salesforce with an easy-to-use and comprehensive guide, then I encourage you to add this great book to your arsenal.

— Dan Streetman, Sr. Vice President,
Worldwide Alliances & Channels, Salesforce

CHAPTER 1

Introducing Salesforce

Salesforce is the world's premier sales and business management tool. It is used by major corporations and small businesses to automate, streamline, and track sales processes, increasing the efficiency and productivity of your staff and maximizing your business's value.



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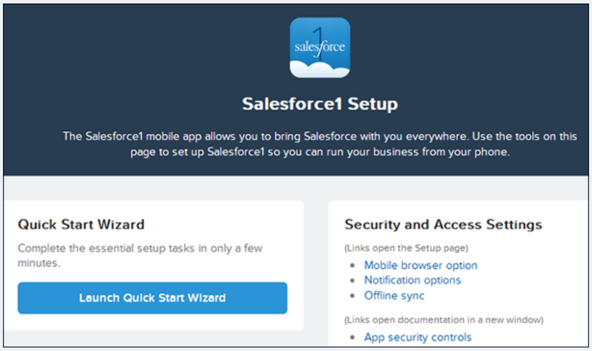
Choose an Edition of Salesforce

To provide you with the best return on your investment, Salesforce offers five editions. Price points and features are outlined at www.salesforce.com/crm/editions-pricing.jsp.

When you contact a salesforce.com account executive, he or she will ask questions to help you choose the edition that best suits your needs. You can upgrade to an edition with more features at any time by sending an electronic order to salesforce.com. Activation takes approximately a day. Note that you cannot downgrade editions.

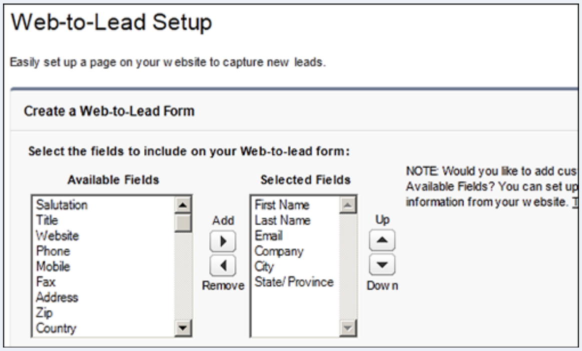
Contact Manager Edition

Contact Manager offers basic contact, task, and event management for up to five users. This edition includes integration with Outlook and mobile access. Note that Gmail is supported only through a third-party add-on.



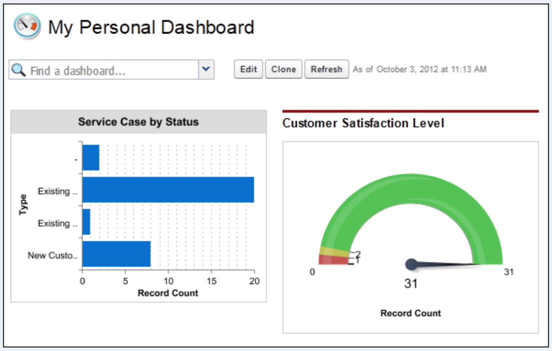
Group Edition

Group Edition includes all the features Contact Manager does, plus a web-to-lead management form, reports, opportunity lists, dashboards for tracking performance, and the option to install one of the applications from the AppExchange, salesforce.com's add-on marketplace.



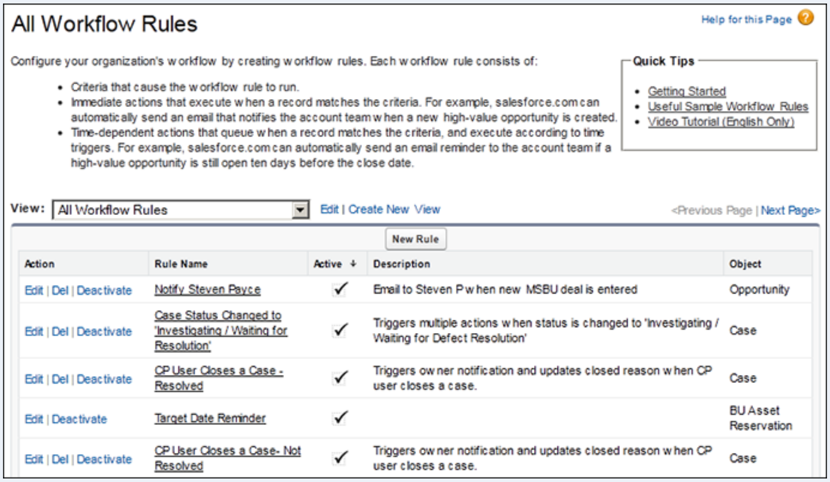
Professional Edition

Professional Edition offers all the features Group Edition does, plus the ability to send mass emails, manage marketing campaigns and products, create customizable personalized dashboards, add custom tabs and objects to Salesforce, and manage cases for customer service tracking. This edition includes up to five AppExchange applications and is ideal for most small businesses because it offers comprehensive analytics and custom reports.



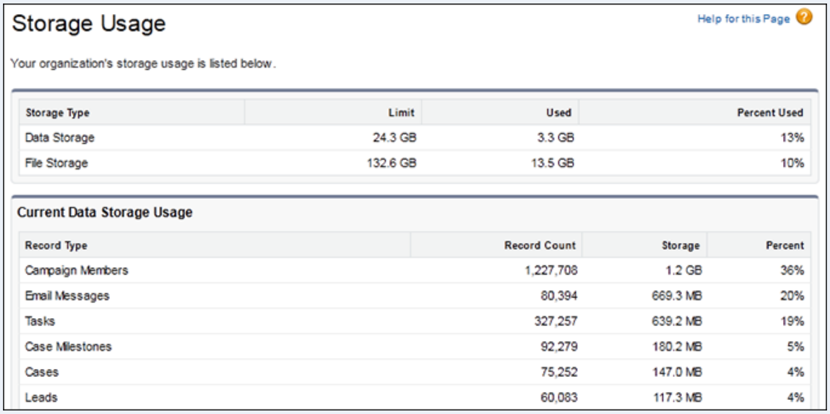
Enterprise Edition

Enterprise Edition is salesforce.com's flagship product. It includes all the features Professional Edition does, plus approval processes; field-level security; workflow rules; a sandbox for testing changes in a developer environment; additional AppExchange packages; record types, which provide the flexibility of using object records for more than one purpose; customized page layouts; and an API (Application Programming Interface) for integration with outside systems. You can manage virtually any business process with Enterprise Edition, because it allows you to create custom applications in addition to the standard sales and customer-service features available out of the box.



Unlimited Edition

Unlimited Edition includes all the features Enterprise Edition does, plus a Premier Success+ Plan; 24/7 technical support; unlimited online training; multiple sandboxes, including a full copy option; increased data storage from 1GB to 24.3GB; increased API limits; and mobile support. Administration services are also available to help you make customizations, which include using more tabs and creating custom objects.



Choose Your Support Plan

Salesforce offers three different support packages for its various products. The Standard Success Plan comes with a self-service portal and knowledge base, online case submissions, and access to the online community. The Premier Success Plan provides 24/7 support, online or phone case submissions, and access to a trained technician who can assist you with making customizations. The Premier+ Success Plan offers all the features listed previously as well as a dedicated system administrator who responds to questions or customization requests within an hour for critical issues.

Understanding the Home Page

The home page gives you quick access to the most useful Salesforce features. You can use the links on this page to access your calendar, create records for prospects and contacts, and define sales tasks. You can also access the Salesforce Chatter feed to post news and files. This page includes a Recycle Bin feature that stores deleted files temporarily, but you can undelete them if you need to.

The ten most recently viewed items also appear on the sidebar for convenient access. Additionally, you can perform global searches at the top of the home page.

A Create New Record

Creates new records for prospects and contacts.

B Show Feed

Displays your Chatter feed — the internal news feed and collaboration tool.

C New Event

Creates a new entry in your Salesforce calendar.

D Create New Task

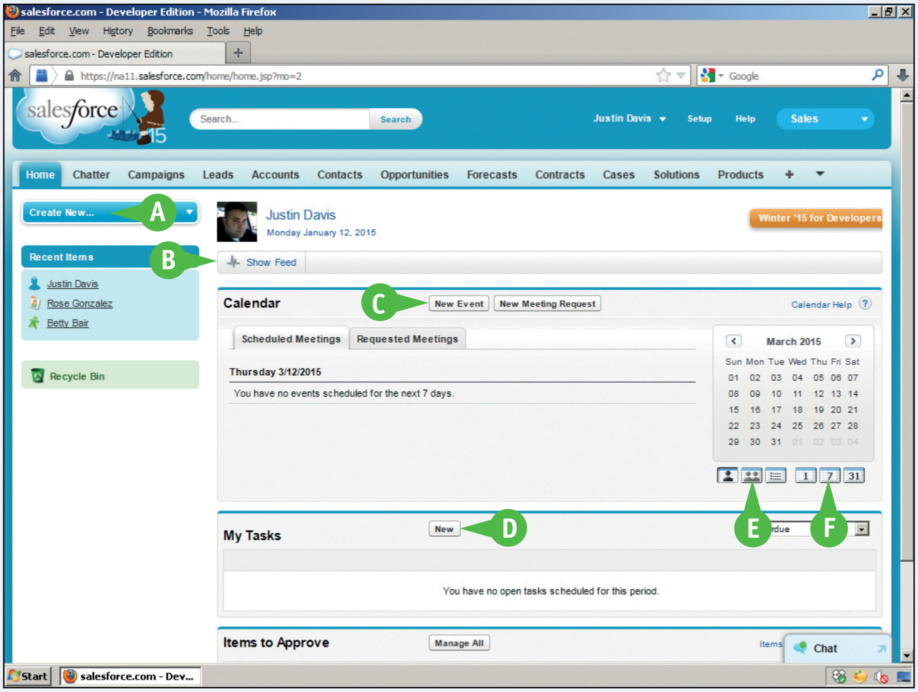
Creates a new sales task.

E Multi-User Display

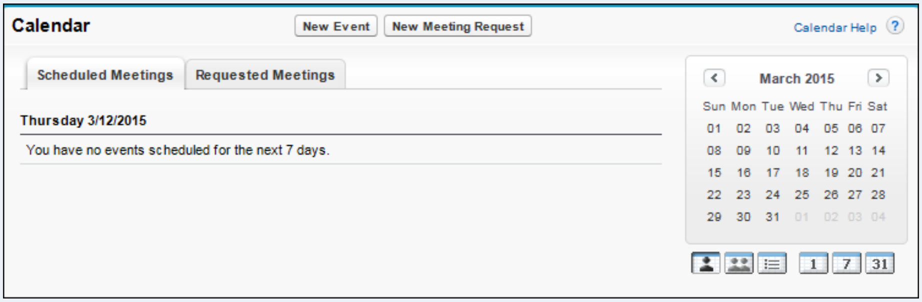
Changes the calendar from a single-user view to a multi-user view.

F Week View

Displays one week of calendar events.

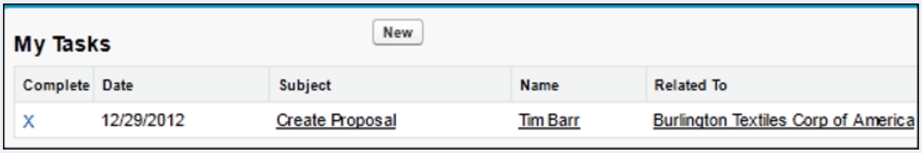


Calendar



You use the calendar to create and manage a list of events. You can view the time/date of each event, list a subject, and click links to associated records. You can also view events in a more familiar graphical format. Click **Single-User View** to see only your events. Click **Multi-User View** to show your co-workers' calendars. You can also view events for the current day (Agenda), week, or month.

My Tasks



The Task area displays your to-do list. To organize tasks, click the Date, Subject, and Name column headers. You can also associate one additional record with each task and display it under the Related To column. Click the check boxes in the Complete column to mark tasks as done when you complete them.

Recent Items

Recent Items shows a list of the last ten records you viewed. Items can include accounts, campaigns, cases, contacts, contracts, documents, ideas, questions, leads, opportunities, quotes, orders, solutions, and users. The list may show fewer than ten items if you delete any of the items that appear here.

Recycle Bin

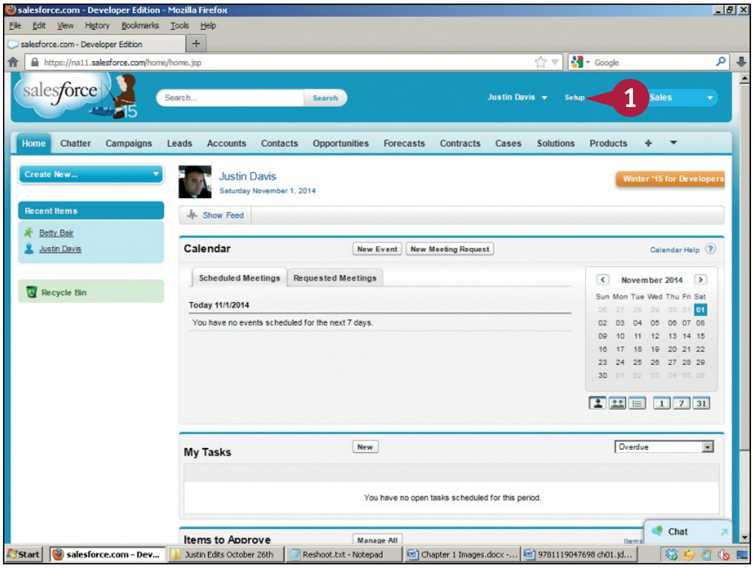
The Recycle Bin keeps deleted records for 15 days before it deletes them permanently. Most Salesforce instances have a limit of 25,000 records. If your organization exceeds this limit, Salesforce begins removing the oldest records from the Recycle Bin after they have been marked as deleted for at least two hours.

Customize the Home Page

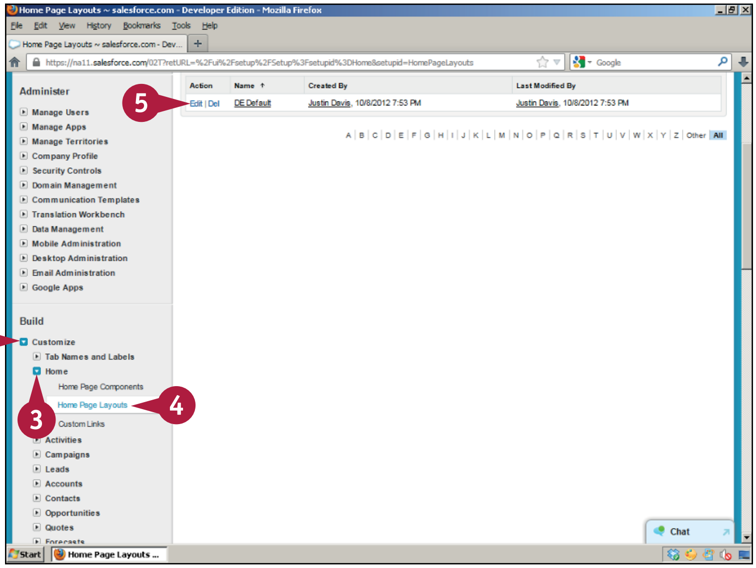
You can customize the Salesforce home page to show items that are useful in your organization and hide items that are not. The changes are visible to all users.

You can access the customization features under Home in the App Setup menu. Select your items from a list of wide and narrow components, and then save your selection. Salesforce automatically updates the layout of the home page whenever you modify it.

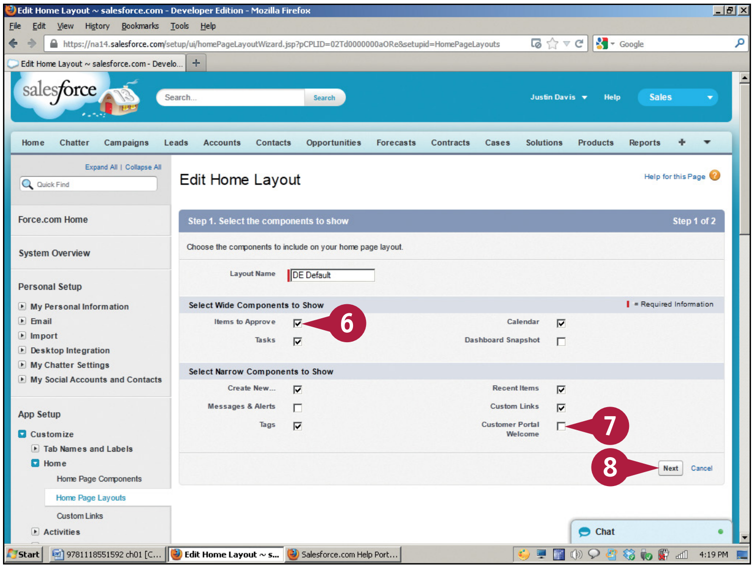
Customize the Home Page



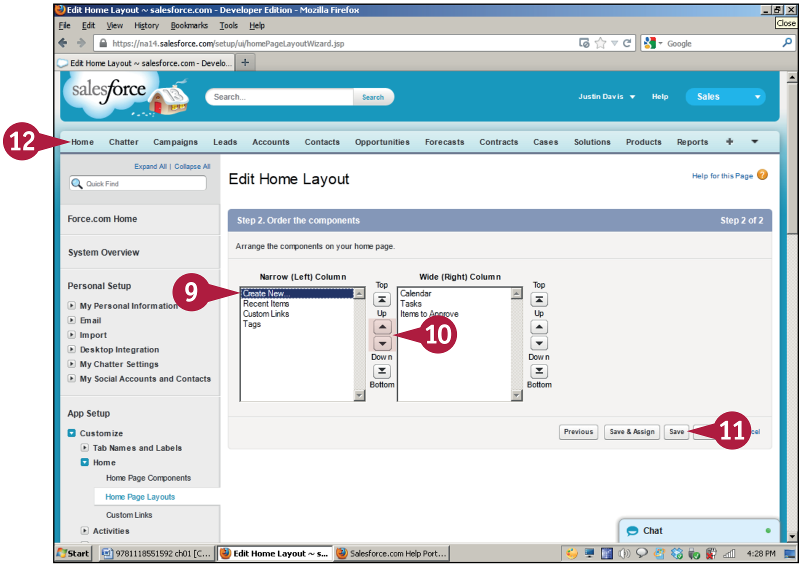
1. Click **Setup** to show the configuration area.



2. Click the **Customize** ▼ to display additional options.
3. Click the **Home** ▼ to view options related to the home page.
4. Click **Home Page Layouts.**
5. Click **Edit.**



6. Click items to remove them from the home page (☑ changes to ☐).
7. Click items to add them to the home page (☐ changes to ☑).
8. Click **Next**.



9. Select an item in either column.
10. Click the **Down** arrow (▾) to move the item down the list, or click the **Up** arrow (▴) to move the item higher in the list.
11. Click **Save**.

Salesforce customizes the home page.

12. Click the **Home** tab to see your changes.

TIP

What is the difference between the wide and narrow components?

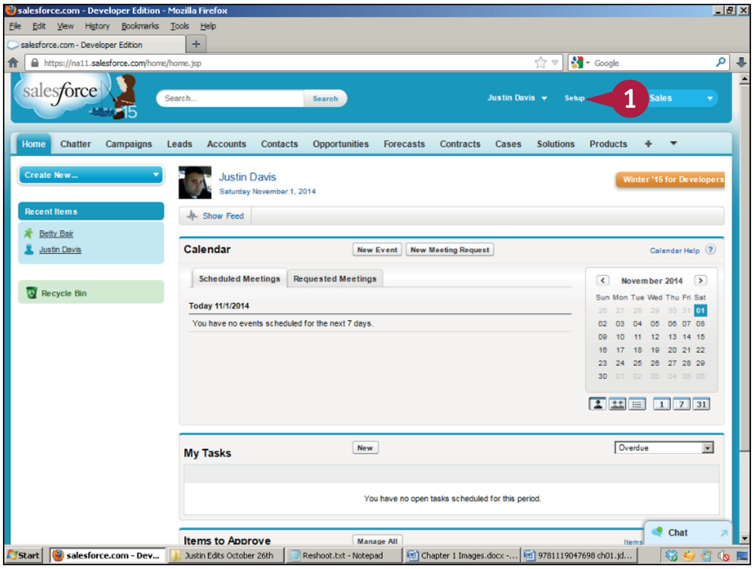
Two content areas appear on the home page — a wide components area in the middle of the page, and a narrow components area to its left. The wide area includes Tasks, Items to Approve, Dashboard Snapshot, and Calendar. The narrow components area contains Create New, Message & Alerts, Tags, Recent Items, and Custom Links. You can reorder these components by dragging them up or down in their respective areas.

Create a New User

You must create users before your team can use Salesforce. Each user needs to have an available license. If you run out of licenses, you must deactivate a user before you can create a new one. To view which licenses are available, click the **Company Profile** tab in Salesforce or contact your salesforce.com account executive. When you create a user, you assign the user a *role*, which defines his job function; and a *profile*, which specifies whether he is a standard user or an administrator who can customize, set up, or extend Salesforce.

Create a New User

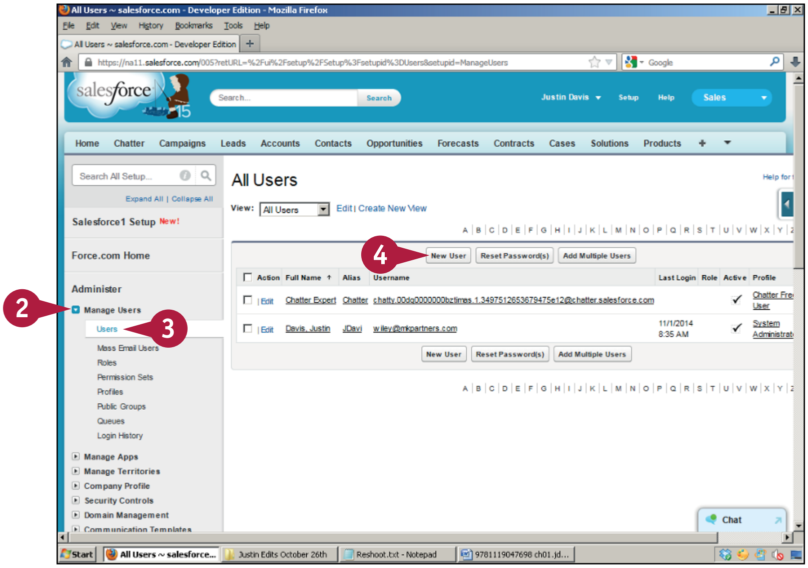
1 Click **Setup** to show the configuration area.



2 Click the **Manage Users** .

3 Click **Users** to display user management options.

4 Click **New User**.



5 Fill in all the text fields marked in red.

6 Click the **Profile** ▼ and click **Standard User**.

Note: You can select other profiles for other types of users, such as administrators.

7 Click the **Marketing User** check box (☐ changes to ☑) to give the user access to your organization's marketing tools.

8 Click the **Offline User** check box (☐ changes to ☑) to give the user offline access.

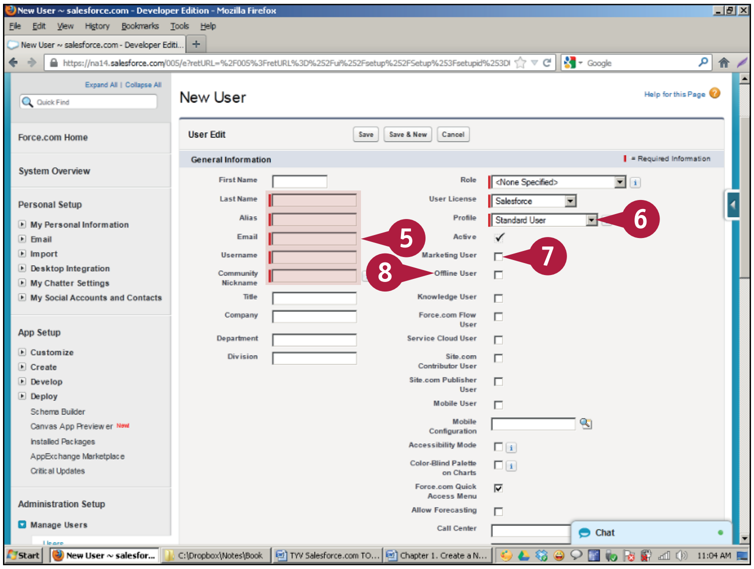
Note: Salesforce supports offline access through a file synchronization briefcase feature, discussed in the second Tip.

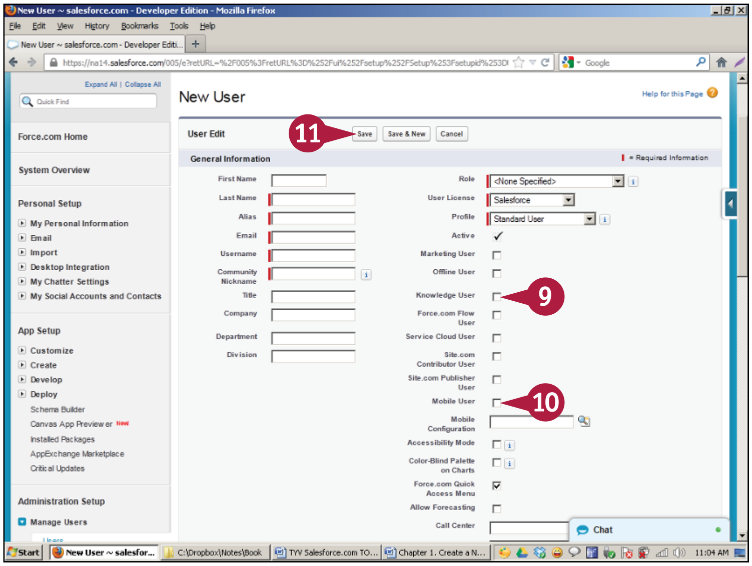
9 Click the **Knowledge User** check box (☐ changes to ☑) to let the user make changes to Knowledge Base articles.

10 Click the **Mobile User** check box (☐ changes to ☑) to let the user access Salesforce from a mobile device.

11 Click **Save**.

Salesforce sends an email to the new user with the user's username, login link, and temporary password.





TIPS

How do I create a new system administrator?

The default account created for you by Salesforce gives you administrator privileges. You can give other users the same privilege by selecting the System Administrator profile for a user when you create the user's account.

How do I access the offline tool?

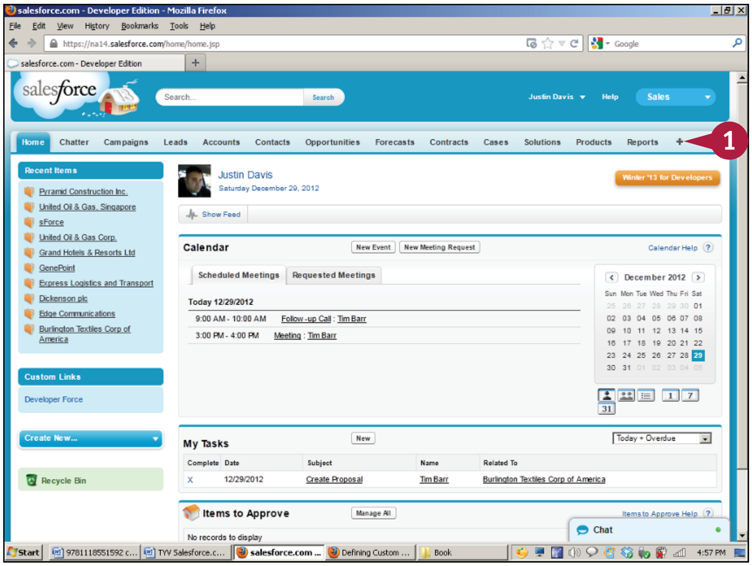
With Salesforce Connect Offline, you can access Salesforce without an Internet connection. The program can be installed on your computer from the My Personal Information area in setup. The Connect Offline records are referred to as the *briefcase* and must be set up by an administrator. The records are synced with Salesforce when you are next online.

Customize the Tabs

Users can customize the tabs in Salesforce. For example, they can simplify their experience by hiding tabs they never use. Users can work with this feature to make Salesforce easier to learn and to improve their efficiency.

Customize the Tabs

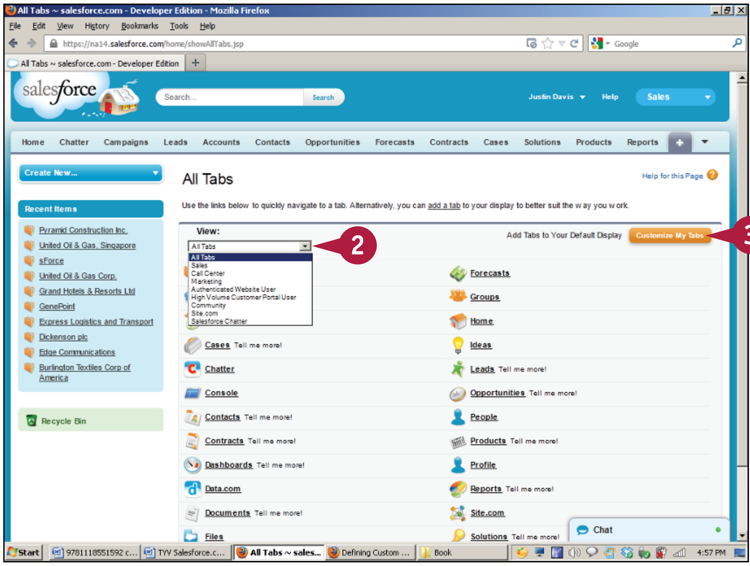
1. Click the plus sign (➕) at the end of the row of tabs.



2. Click the **View** ▼ and select **All Tabs** or **Select Tabs**.

Note: You can choose the tabs to customize using the Select Tabs option. Otherwise, Salesforce displays all available tabs.

3. Click **Customize My Tabs**.

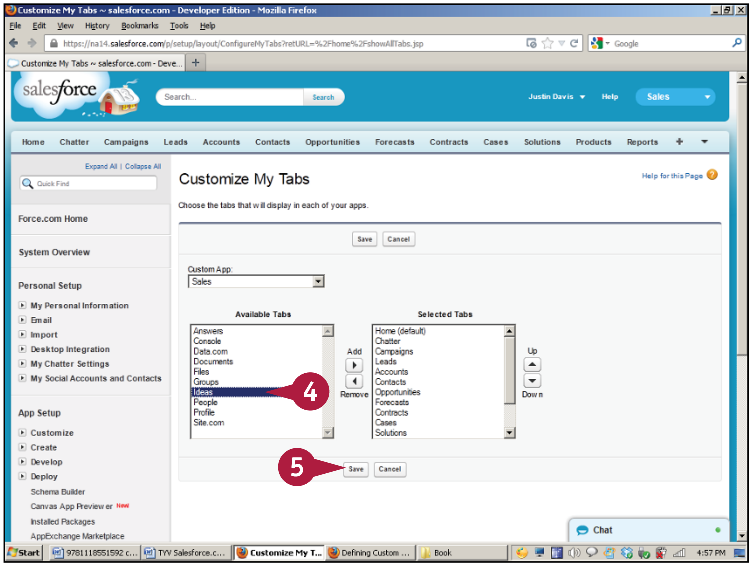


4 Click one or more of the available tabs.

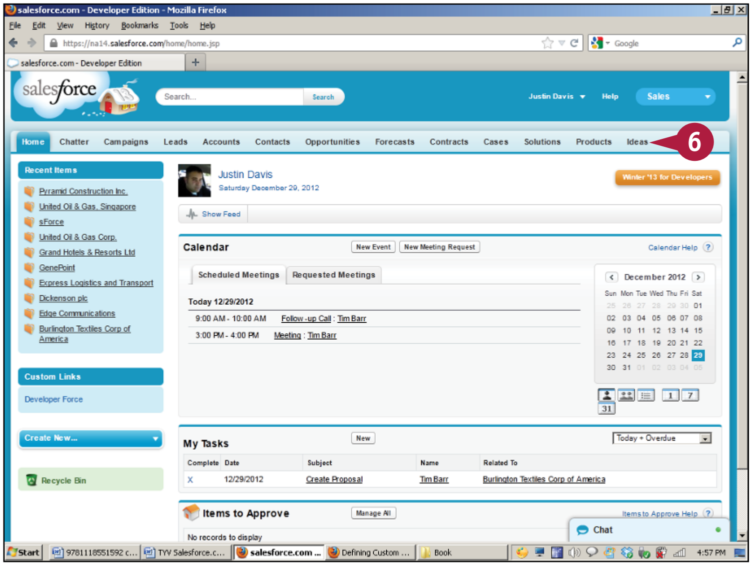
Note: The Selected Tabs column on the right shows tabs that are already visible. The Available Tabs column on the left shows tabs you can add.

Note: This example adds the Ideas tab.

5 Click **Save**.



6 Click **Ideas** to see the new tab configuration.



TIP

Can I turn certain tabs on or off for users in Salesforce?

Salesforce allows each user to customize his or her row of tabs, but each profile has different default tab settings. An administrator can set each tab to *default on* (visible), *default off* (invisible, but switchable), or *hidden* (invisible).

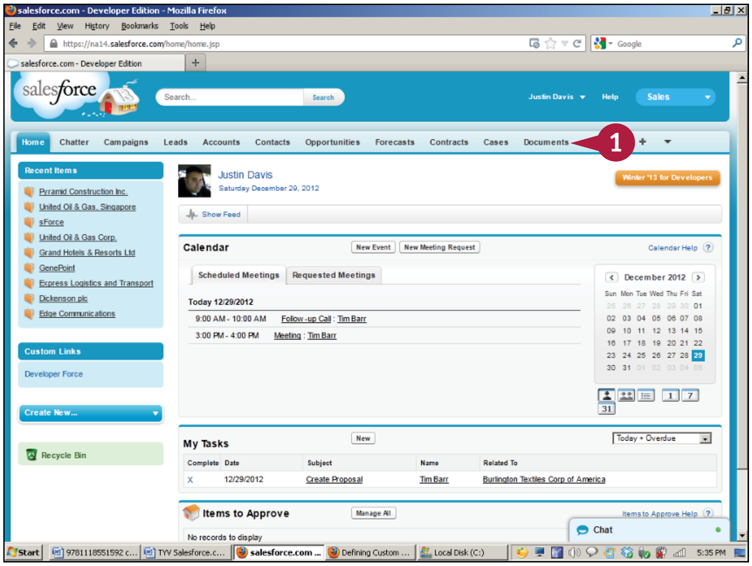
Upload a Company Logo

You can add a company logo to Salesforce. Users can insert this logo when creating apps, sending emails, or generating other documents. Typically users add the logo to templates for these documents. Salesforce then inserts the logo automatically.

Upload a Company Logo

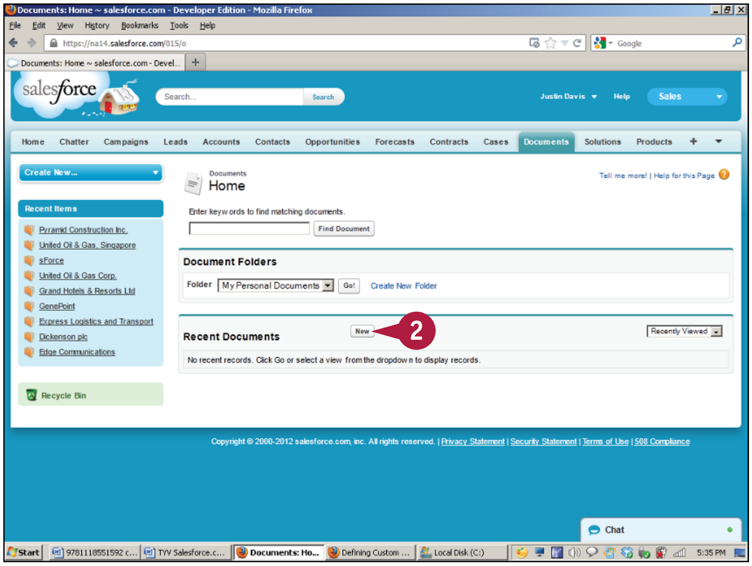
1 Click the **Documents** tab.

Salesforce displays the Documents area.



2 Click **New**.

Note: The logo is stored in a new document.



3 Type **Logo** in the Document Name field.

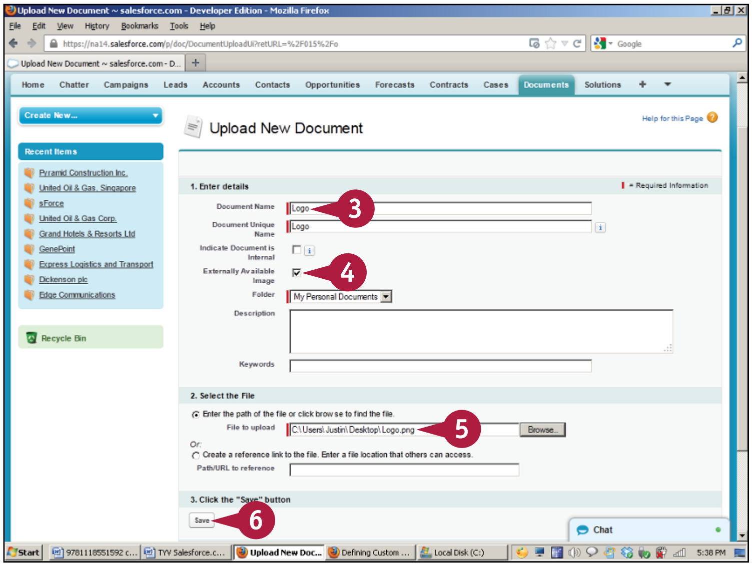
Note: You will use another name if your organization has a different naming convention.

4 Click the **Externally Available Image** check box (☐ changes to ☑).

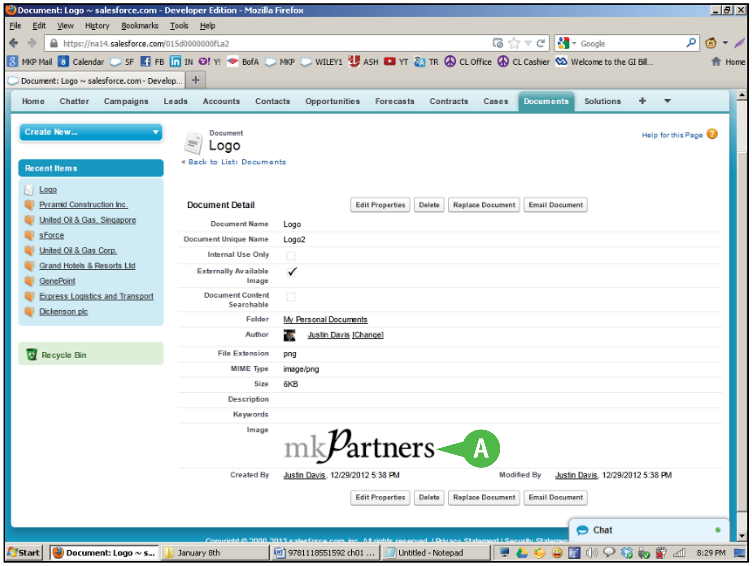
Note: The document is now available outside the Documents area.

5 Click **Browse** and navigate to your logo file.

6 Click **Save**.



A Salesforce uploads the logo and makes it available for use in other documents.



TIP

What size should my logo be?

The logo must be 255 x 55 pixels and smaller than 20K.

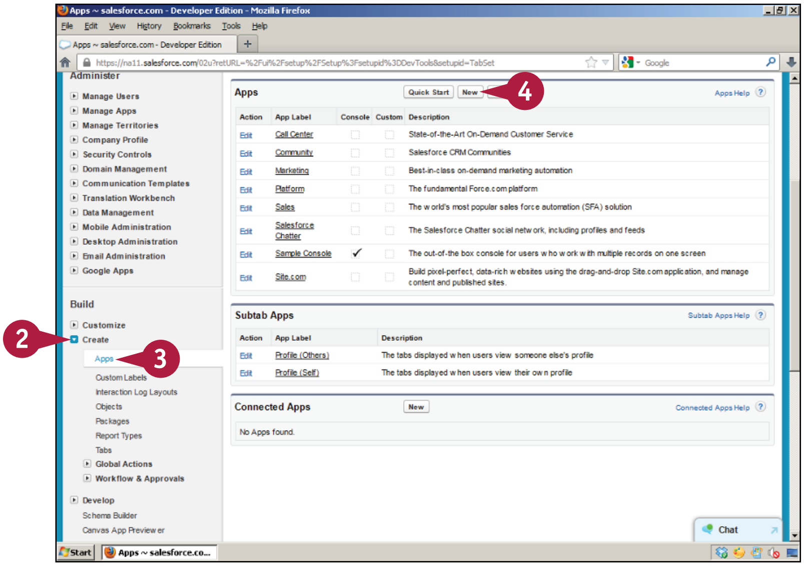
Create an App

An *app* (short for *application*) in Salesforce is a collection of tabs that provides useful features to a team or department. Salesforce comes with standard apps such as Sales and Chatter, a social networking tool. You can get more from Salesforce by creating your own custom tab collections. The apps available in Salesforce are listed in the Force.com app menu. When you select an app, Salesforce automatically changes the tabs you see. For example, if you switch from a sales app to a customer service app, Salesforce removes the leads and opportunities tabs and shows the cases and console tabs.

Create an App

Create an App

1. Click **Setup** to show the configuration area.
2. Click the **Create** .
3. Click **Apps**.
4. Click **New**.



5. Click **Next**.

Note: The default option is Custom app. You do not usually need to change this.