Salesforce Fast Start/ Back to Basics

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Housekeeping

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

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

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

• Not everyone’s Salesforce org is the same

• 98% of what you learn today will be relevant to your unique customisations

• If you’re a Non-Profit or Charity
  – Accounts = Organisations
  – Opportunities = Donations/ Grants
Course Goals

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

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

• Any common browser
  – Firefox, Internet Explorer, Chrome, Safari
  – You can also access it on iPhone, Android, BlackBerry, iPad...

• I can log in from anywhere?
  – Yes! If you can browse the web, you can log in
  – Can be restricted to certain times and/or certain locations
Let’s log-in!

- Using a training database – you can’t break it!

1. Navigate to login.salesforce.com
2. Log-in using Username/ password on handout
Home Page
Record Detail Page
Global Search

• Searches your whole database
• Pin objects you use most
• Use ‘wildcards’
  – * can be anything
  – ? is ONE of anything
Navigate Salesforce

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

• Let’s look at how Salesforce compares to a system you might have used before
# Salesforce - List of Contacts

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<th>Mobile</th>
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Database (Excel)

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## Records

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### Spot the Data Issues

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<td>Light bulbs (60W)</td>
<td>10%</td>
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<td>F. Smith</td>
<td>Light bulbs (40W)</td>
<td>20%</td>
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<td>Heat &amp; Light Co</td>
<td>Frederick Smith</td>
<td>Kettle (3kW)</td>
<td>30%</td>
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<td>Heat and Light Co</td>
<td>Fred Smythe</td>
<td>LED Light Bulb (5W)</td>
<td>90%</td>
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<tr>
<td>6</td>
<td>Heat and Fight Co</td>
<td>Jane Doe</td>
<td>LED Light Bulbs (5W)</td>
<td>80%</td>
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<td>7</td>
<td>H &amp; L Company</td>
<td>Janet Doe</td>
<td>L.E.D. Light Bulb (5W)</td>
<td>61%</td>
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<tr>
<td>8</td>
<td>H &amp; L Co.</td>
<td>Jane Do</td>
<td>Kettle (3kW.)</td>
<td>10%</td>
</tr>
</tbody>
</table>

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

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

Account

- Contact 1
- Contact 2
- Contact 3
- Opportunity 1
- Opportunity 2
Accounts

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

- Click ‘New’ button on object home page
  - Red line means field is compulsory
  - Magnifying glass is a ‘Look up’
  - Picklists

- Don’t forget to Save!
Create an Account

1. Click ‘New’ button on the Accounts homepage
2. Fill in the following fields:
   I. Account Name
   II. Phone
   III. Website
   IV. Industry
   V. Billing Address
Editing Records

• Edit whole record using edit page
  – Click ‘Edit’ button on Record Page

• Edit individual fields on record detail page
  – Double click each field
  – Press enter twice

• Edit records en masse using Views
1. Edit the Account you just created. Use the edit page for the following fields:
   I. Phone
   II. Industry

2. Edit the fields below by double clicking them on the record detail page:
   I. Address
   II. Website
Contacts

• Anyone with a pulse!
  – Employees of your Accounts
  – Volunteers
  – Donors
  – Grantees
Create Contacts

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

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

1. Find the Account you created earlier. Create an Opportunity by clicking the Opportunities related list ‘New’ button.

2. Find the Contact you created earlier. Create an Opportunity by clicking the Opportunities related list ‘New’ button.

3. What difference does this make?
Activities

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

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

• Someone who may be interested in your organisation’s products/services
  – Potential sales
  – Potential donors/volunteers/grantees

• Leads can come from
  – Web-to-Lead form
  – A list you bought
  – A stack of business cards
Create a Lead

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

• When a Lead has been ‘qualified’ it is converted to
  – Account
  – Contact
  – Opportunity (optional)

• Get organisation wide agreement on
  – What is a Lead and what is a Account/ Contact
  – When a Lead should be converted
Lead Conversion Diagram

Lead

Contact

Account

Opportunity

Can’t unconvert a Lead
Convert Your Lead

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

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

Run a View

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

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

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

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

• Salesforce Help & Training link

• Third Sector IT website
http://thirdsectorit.org/salesforce-training-london-uk/free-salesforce-training/
This Slide Deck

- A copy of this presentation can be found on our website
- Go to thirdsectorit.org
- Go to Training > Training Resources, and download this and other presentations
Training Survey

• Please fill in a feedback form
  – Link is in the training org home page sidebar
Thank You!

• Any questions?