Salesforce User Guide

LGI

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1 About This Guide

Salesforce is the system of record for LGI's prospective and current client information. We created this guide to supplement Salesforce's text-based help articles. Follow these instructions to get the most out of this software.

This document is divided into the following sections:

- Section 2: "Creating Records in Salesforce"
- Section 3: "Creating Reports in Salesforce"

1.1 Who Should Use It

LGI uses Salesforce to track sales and marketing activity. Enter data in the way presented in this guide to ensure accurate information. If you interact with prospective and current clients, you should review this guide.

1.2 Typographical Conventions

This document uses the following conventions:

- Menu items and field names appear in **bold**.
- User-supplied information appears in quotation marks.

2 Creating Records in Salesforce

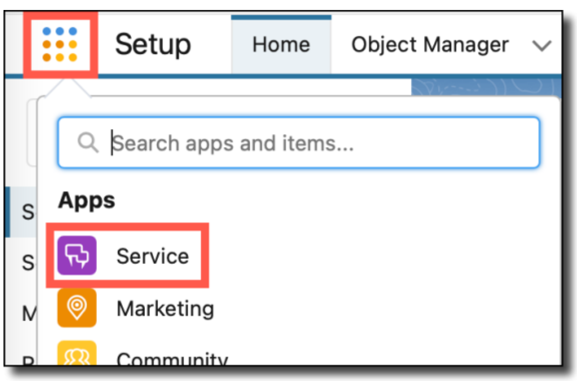
Enter data in the Service and Marketing modules for all team members to access. Entering data in a consistent and accurate way aids collaboration. Our client outreach is more effective when all staff are updated about lead activity.

2.1 How to Create a Contact

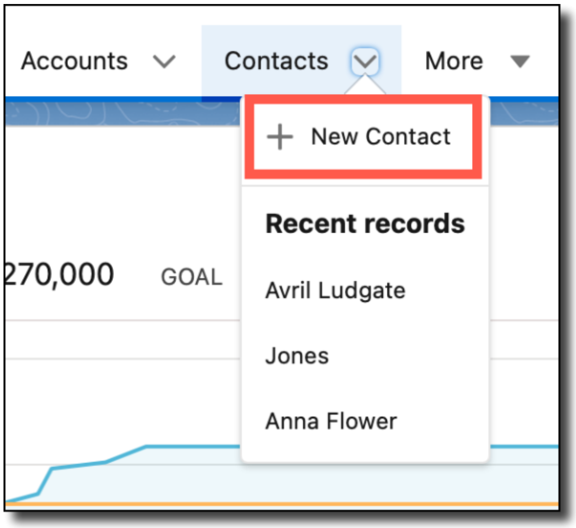
Contacts are associated with companies. Enter data related to companies under accounts (see below).

To create a contact:

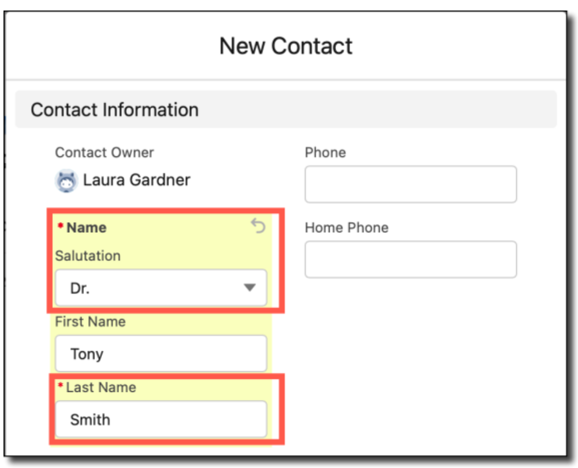
1. In the **App Launcher**, click **Service**.



2. Under **Contacts**, click **+ New Contact**.



3. Enter text in the red required fields, **Salutation** and **Last Name**.



4. If available, enter additional information, such as address, phone number, language, and description.

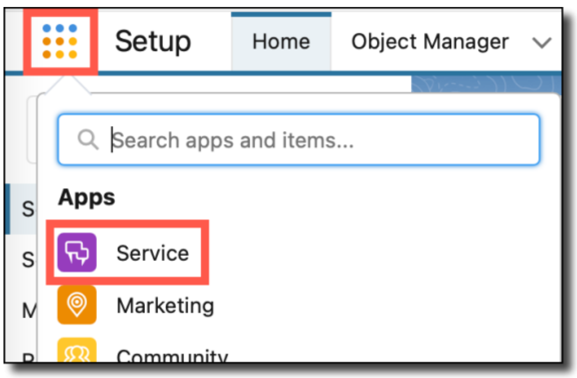
5. Click **Save**.

2.2 How to Create an Account

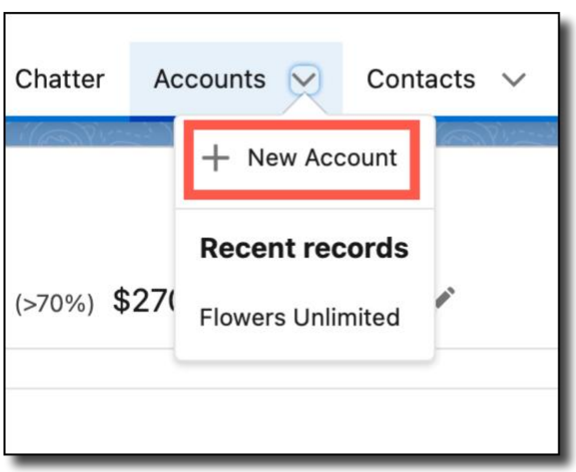
Create accounts to manage your relationships with prospective and current clients. Associate contacts with the relevant account. Your team members can also access, manage, and work on your accounts.

To create an account:

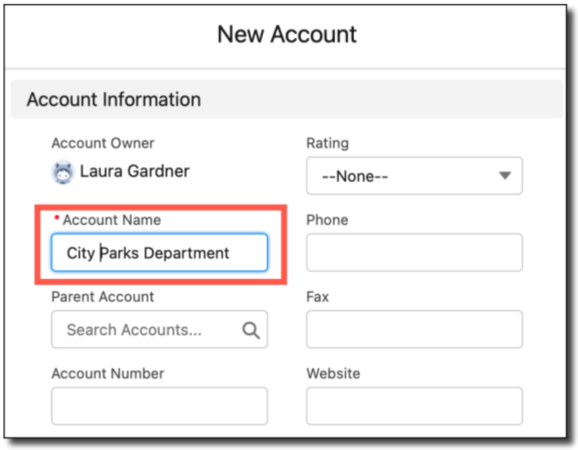
1. In the **App Launcher**, click **Service**.



2. Under **Accounts**, click **+ New Account**.



3. Enter the red required field: **Account Name**.



4. If available, enter additional information, such as address, phone number, website, and description.

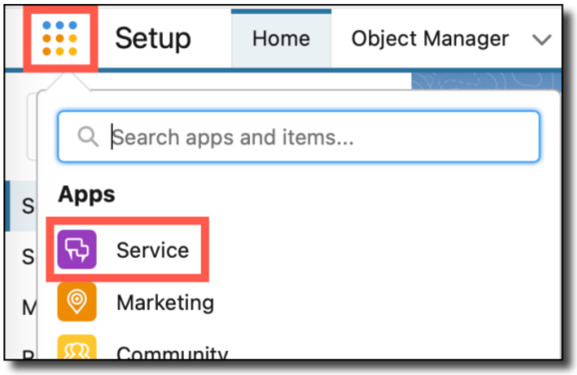
5. Click **Save**.

2.3 How to Create a Case

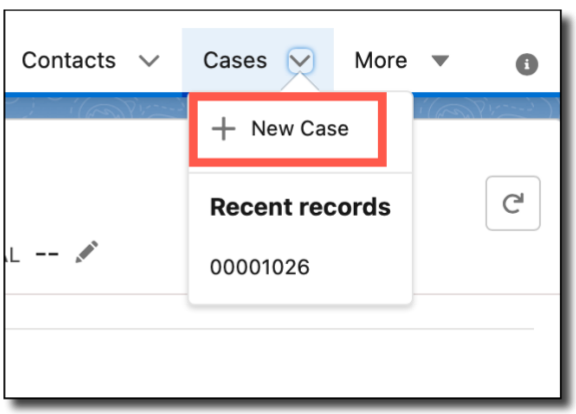
Create cases to manage lead follow-up, opportunities, and internal tasks. You may associate a case with a contact, an account, or both.

To create a case:

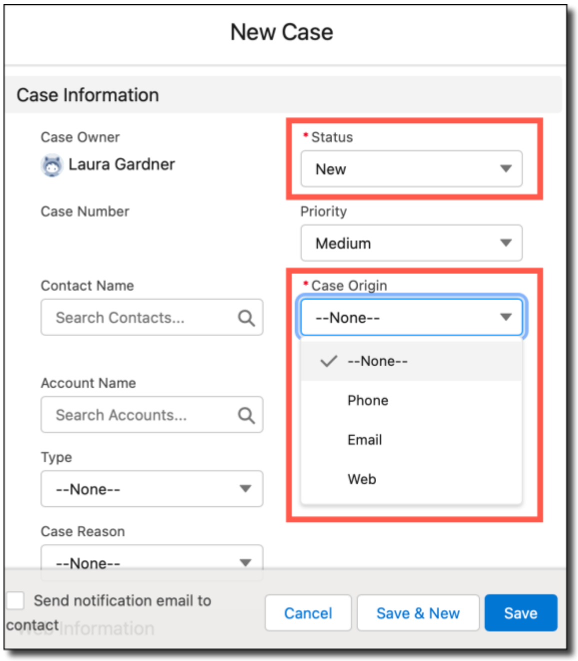
1. In the **App Launcher**, click **Service**.



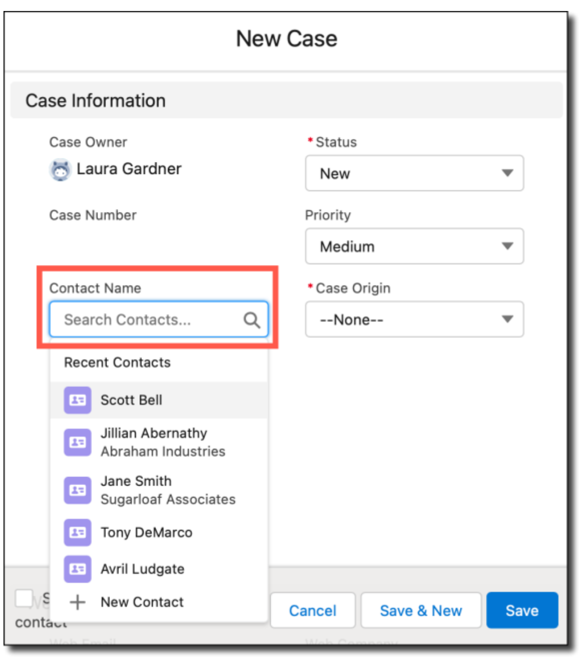
2. Under **Cases**, click **+ New Case**.



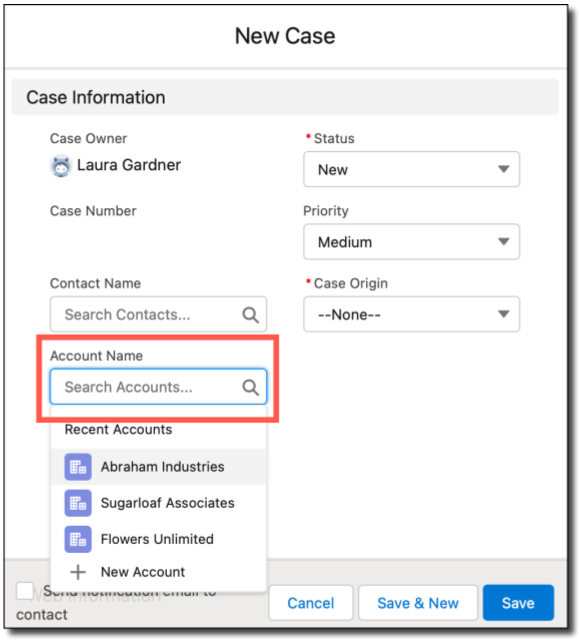
3. Select the appropriate prompts in the red required fields: **Status** and **Case Origin**.



4. To link the case with a contact, begin typing the **Contact Name** and select a contact. You may also select **+ New Contact** to create a new contact and link it to the case.



5. To link the case to an account, begin typing the **Account Name** and select an account. You may also select **+ New Account** to create a new account and link it to the case.



6. Add additional information in the optional fields.

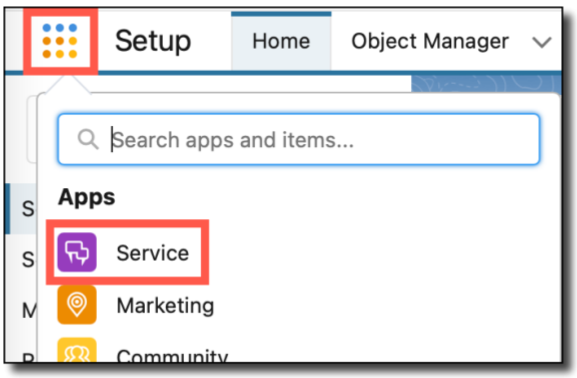
7. Click **Save**.

2.4 How to Create a Chatter Post

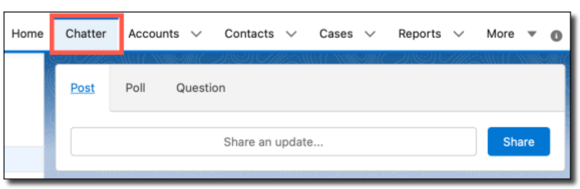
Create a chatter post to ask for advice, celebrate successes, and share ideas and feedback.

To make a chatter post:

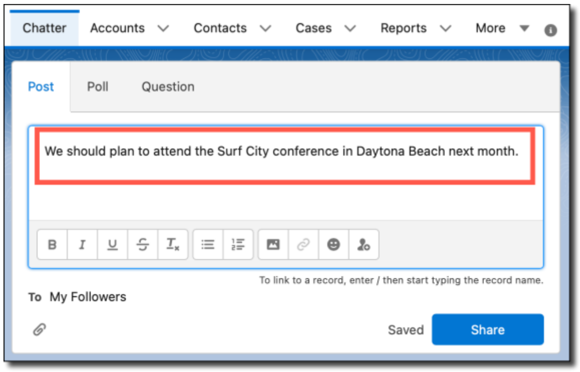
1. In the **App Launcher**, click **Service**.



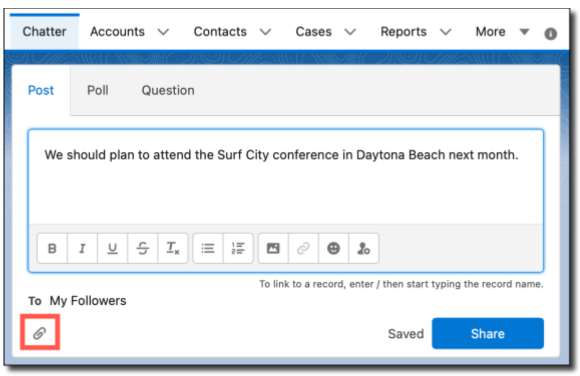
2. Click **Chatter**. A text box labeled **Post** displays.



3. Click in the text box and enter text.

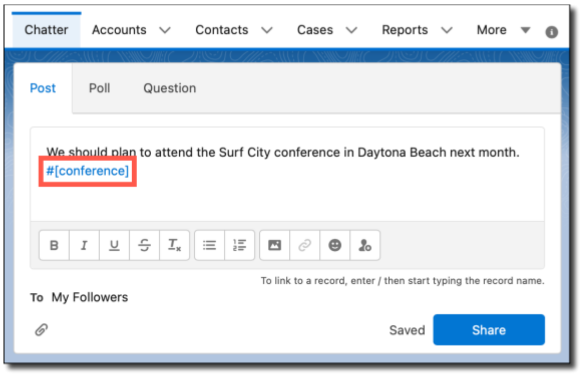


4. To attach a file, click the paperclip icon and select the file.



5. To mention a person or a group, type "@" and then start typing their name. Select the appropriate person or group from the drop-down list.

6. To add a topic to your post, type "#" and then start typing the topic name. Select the appropriate topic from the drop-down list or create a new topic. Chatter posts are searchable by topic.



7. Click **Share** to post.

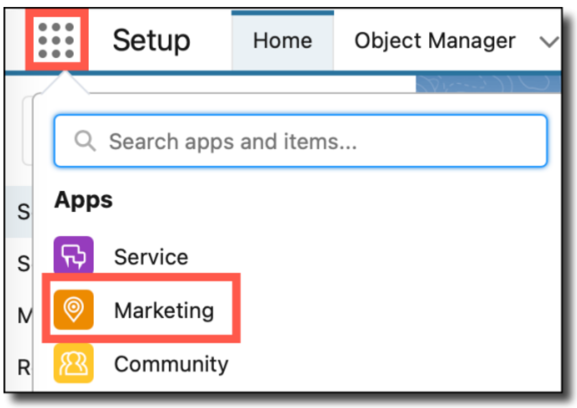
Your followers can now view your post, and it will appear in their feeds.

2.5 How to Create an Opportunity

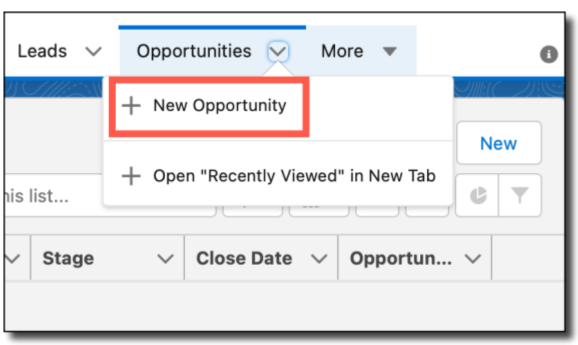
Opportunities let you track and manage potential sales deals. You can link your opportunity with an account, contact, activity, task, or event.

To create an opportunity:

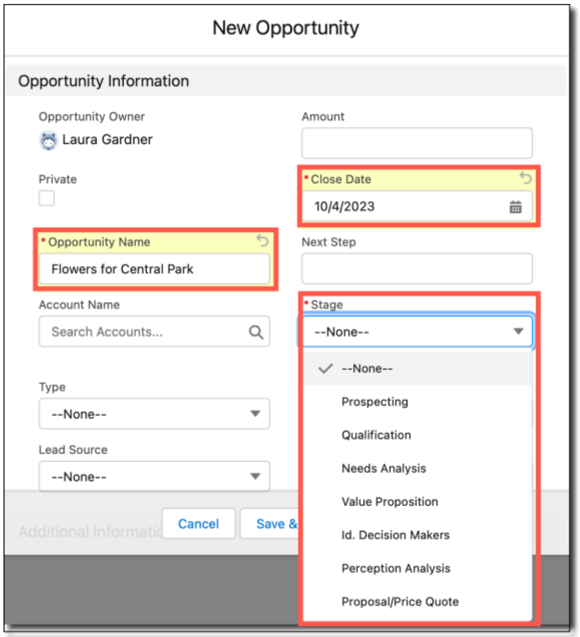
1. In the App Launcher, click **Marketing**.



2. Under **Opportunities**, click **+ New Opportunity**.



3. Add the required fields: **Opportunity Name**, **Close Date**, and **Stage**.



4. If applicable, enter additional information, such as the lead source, amount, and probability of success.

5. Click **Save**.

3 Creating Reports in Salesforce

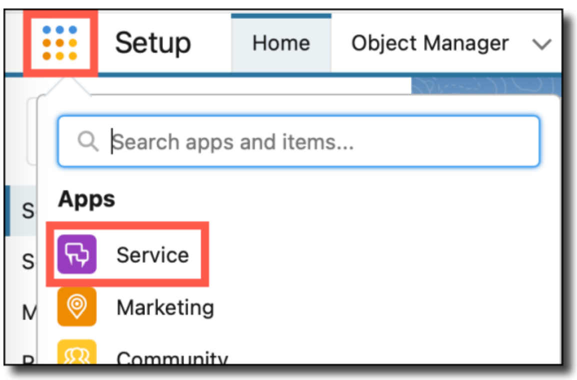
Use reports to understand our sales pipeline and lead activity.

3.1 How to Create a Report

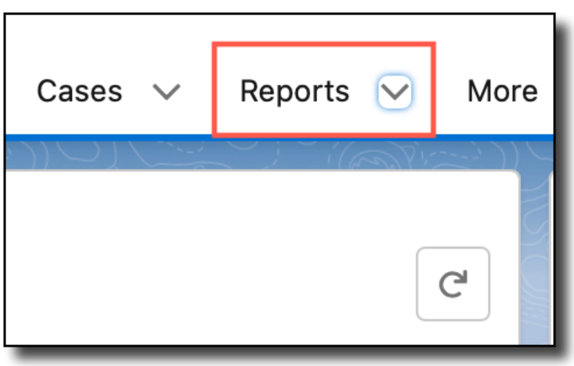
Reports display specific data so you can analyze our sales activities. Store reports in designated folders to control access.

To create a report in Salesforce:

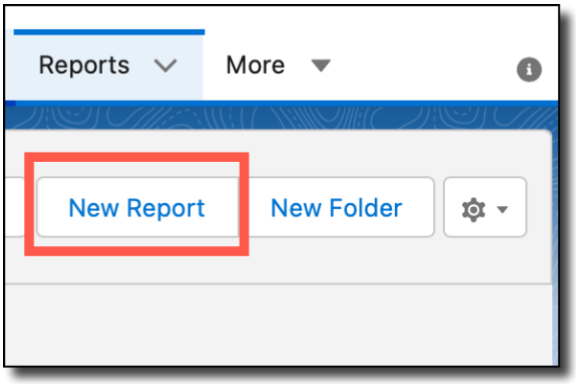
1. In the **App Launcher**, click **Service**.



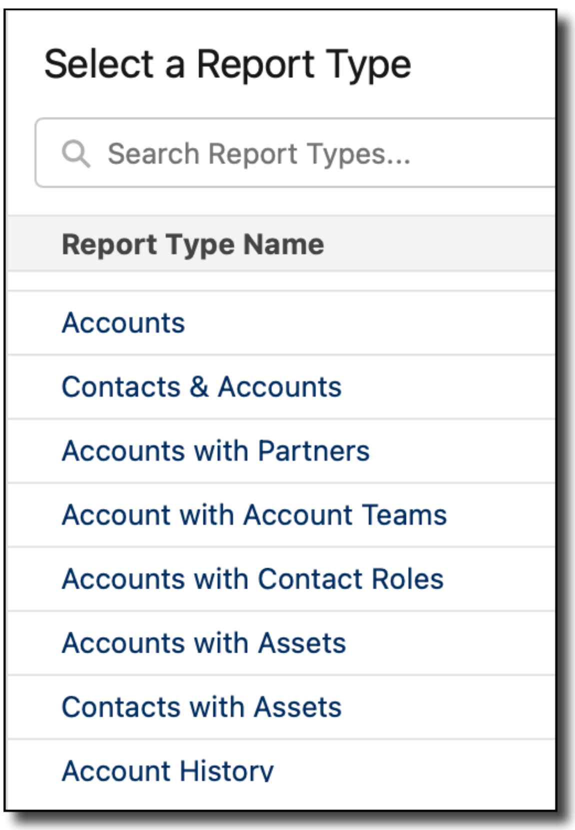
2. Click **Reports**.



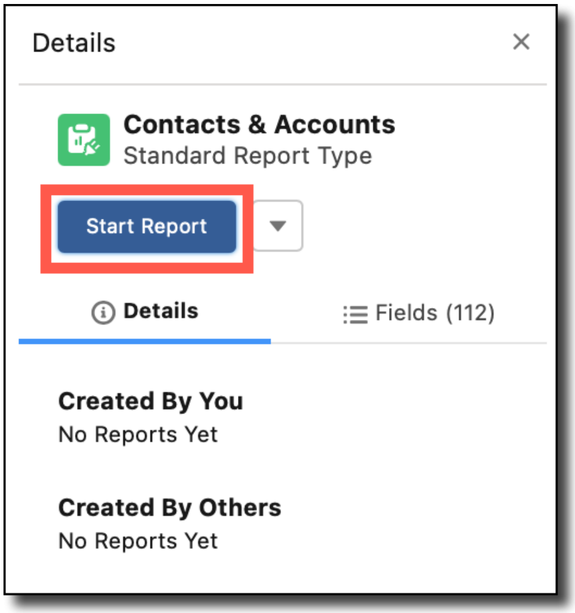
3. Click **New Report**.



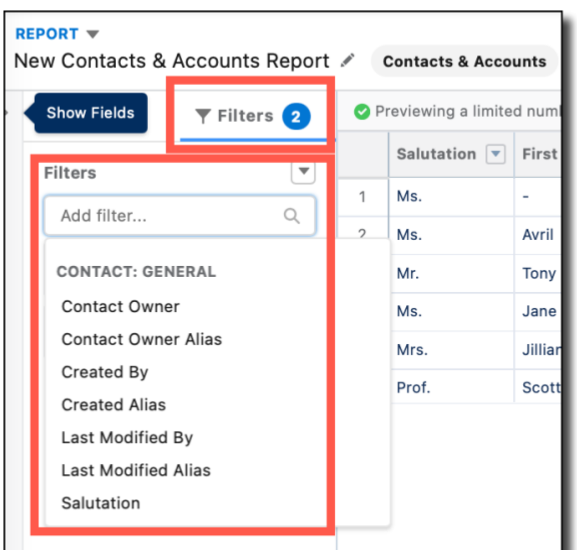
4. Select the type of report you want to create.



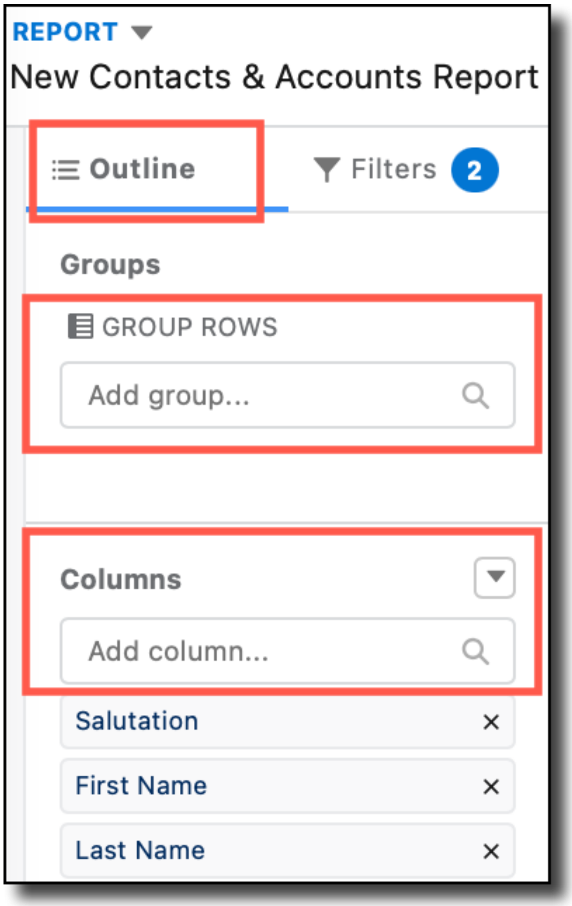
5. Report information displays. Click **Start Report**.



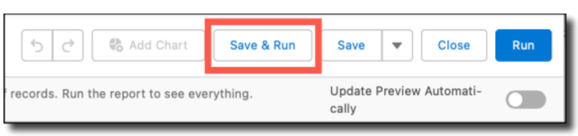
6. The report displays. Select **Filters** to choose what data to include.



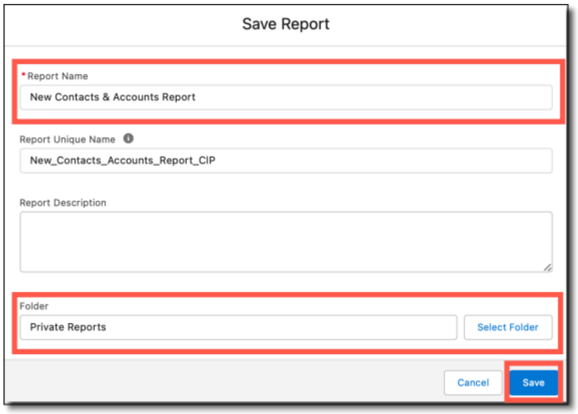
7. Use the **Outline** menu to group the records and choose which columns to display.



8. Select **Save & Run**.



9. Enter the **Report Name** and select which **Folder** the report should go in.



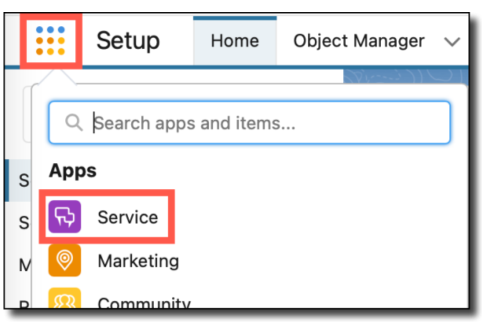
10. Click **Save**.

3.2 How to Schedule Report Delivery

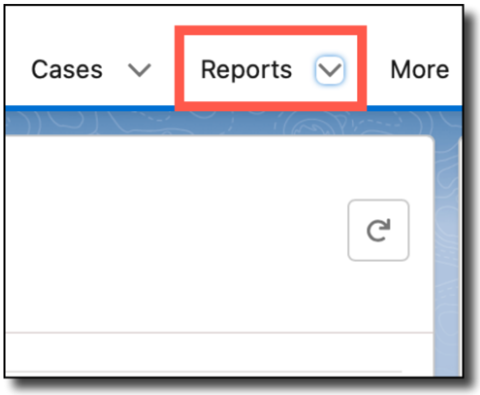
Set up a schedule to send reports to yourself or other users on a recurring basis.

To schedule a report for delivery:

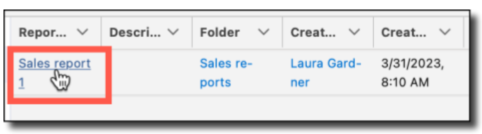
1. In the **App Launcher**, click **Service**.



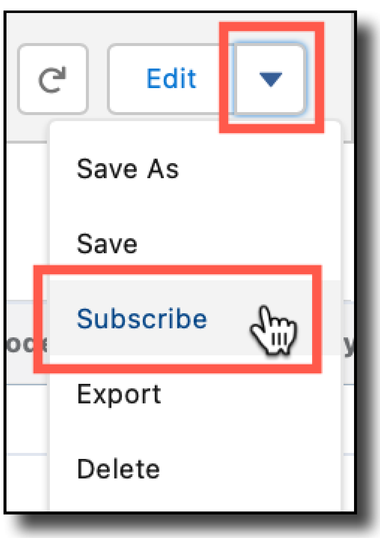
2. Click **Reports**.



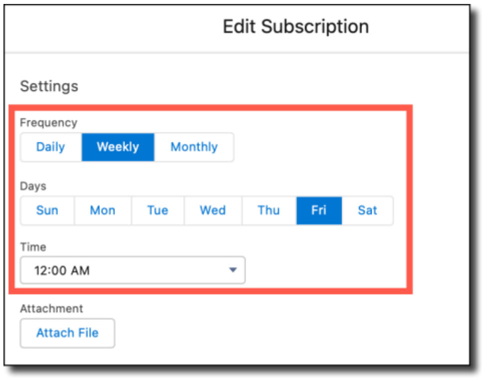
3. Select the report you want to schedule for delivery.



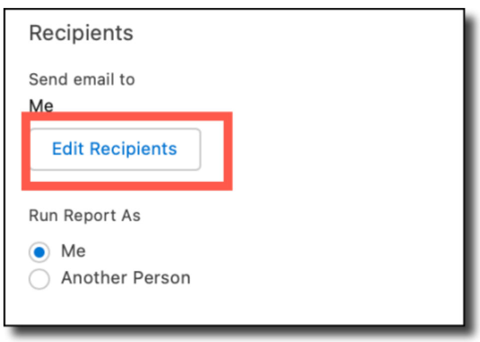
4. Click the down arrow. Then click **Subscribe**.



5. Set the delivery **Frequency** and the delivery **Time**. The time zone defaults to the time zone you (or the report sender) are in.



6. To send the report to other users, select **Edit Recipients** and add recipients.



7. Click **Save**.