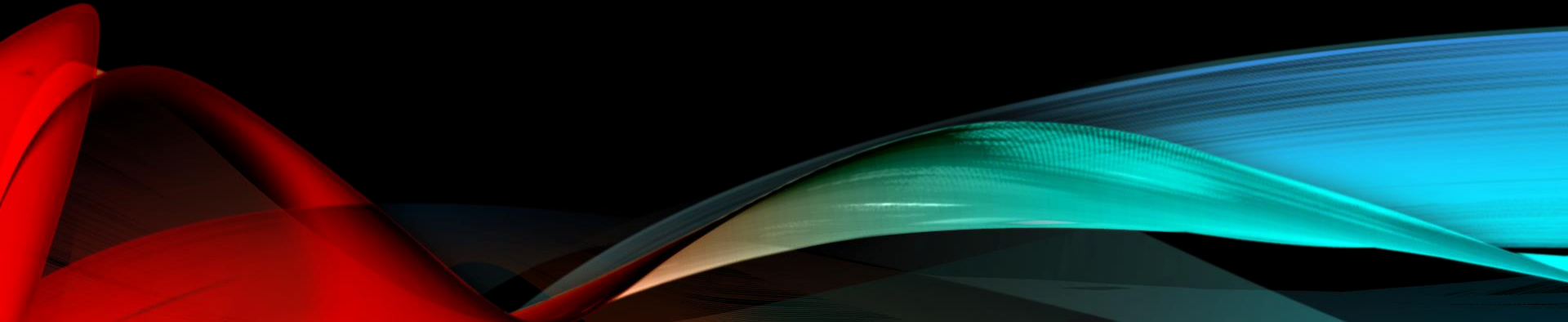


SALESFORCE.COM TRAINING
MODULE:
ACCOUNTS & CONTACTS

By James Roman, MBA

ACCOUNTS AND CONTACTS MODULE



CREATING ACCOUNTS

Or Accounts Tab and New

Search
First!

“Create
New”
Option in
left
navigation

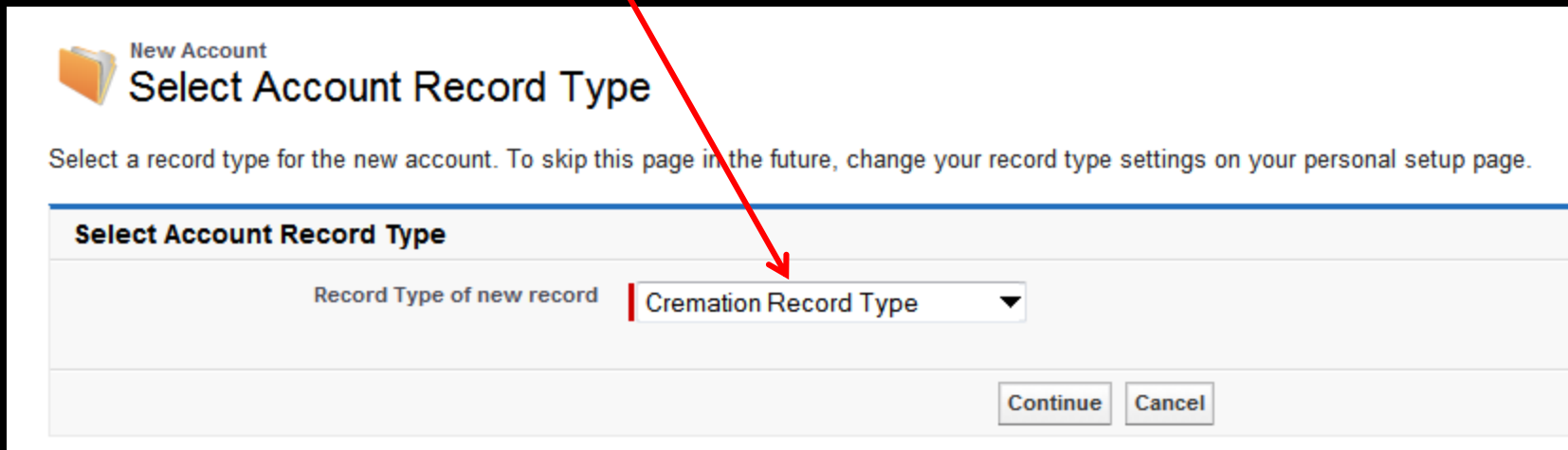
The screenshot shows a CRM interface with a top navigation bar containing tabs: Home, Accounts, Contacts, Opportunities, Orders, Equipment, Reports, Dashboards, Documents, Campaigns, and a plus sign. The 'Accounts' tab is selected. Below the navigation bar, there is a search bar with a 'Go!' button and a checkbox for 'Limit to items I own'. A 'Create New...' dropdown menu is open in the left navigation pane, with 'Account' selected. The main content area shows the 'Accounts Home' page with a 'View:' dropdown set to 'All Architectural Accounts' and a 'Go!' button. A 'New' button is located at the top right of the 'Recent Accounts' section. Below this is a table of recent accounts.

Account Name	Account Record Type
GREENOAKS MEMORIAL PARK-SCI	Architecture/Cemetery Shared
CHILTON COUNTY HUMANE SOCIETY	Summa Record Type
AMERICAN CREMATION SERVICES	Summa Record Type
CUTLER FUNERAL HOME	Cremation Record Type
WISE PRODUCTS INC	Summa Record Type
TOM LAWS	Summa Record Type
CARRIAGE SERVICES	Cremation Record Type
YOUR BEST FRIEND	Cremation Record Type
SEAMAN-POE MONUMENT CO.	Summa Record Type
OAKLAND CEMETERY AND MAUSOLEUM	Summa Record Type

Show 25 items

CREATING ACCOUNTS: SELECT RECORD TYPE

Select "Cremation Account Record Type"



New Account
Select Account Record Type

Select a record type for the new account. To skip this page in the future, change your record type settings on your personal setup page.

Select Account Record Type

Record Type of new record | **Cremation Record Type** ▼

CREATING ACCOUNTS

Account Edit
New Account

Account Edit [Save] [Save & New] [Cancel]

Account Information

Type: --None--

SAP Account Group: []

Account Name: []

Account Site: []

Parent Account: []

Cremation Divisions: 34 Service, 40 Supplies, 41 Equipment, 48 Niches/Columbarium, 49 Bio, Heat Recovery/Incineration

Territory: --None--

Distribution Channels: 08 UNIVERSITIES, 14 VAULT COMPANIES, 16 CHURCHES, 17 CREMATORY, 18 VETERINARY, 98 INTRA/INTER COMPANY

Region: --None--

Location#: []

Distributor Account: []

Account Owner: Art Schrage

Prospect/Customer Rating: --None--

Account Number: []

Customer Group: --None--

Phone: []

Other Phone: []

Equipment Type: --None--

Current Equipment: US Cremation - Batch Incinerator A160, US Cremation - Batch Incinerator A180, US Cremation - Batch Incinerator A240, US Cremation - Human Classic, US Cremation - Human Other, US Cremation Incinerator Other

Cremations Per Year: []

Service/Supply Rep: --None--

Equipment Rep: --None--

RED Bar on field = Required Field

Complete as much information as available

CREATING CONTACTS

Create from the Account Record

“New Contact” from the Contacts Hover list

Search First to make sure the Contact doesn't exist!

Account
Summa Test Lead1

« Back to List: Accounts

Contacts [1] | Opportunities [1] | Cases [0] | Open Activities [1] | Activity History [2]

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

Action	Contact Name	Title	SAP Department Description	Email	Phone
Edit Del	Test				(412) 555-1212

Account Number Fax

Account Name Summa Test Lead1 [View Hierarchy](#) Additional Fax

Account Site Website

Click “New Contact” in the Contacts Related List section

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

Action	Contact Name	Title	SAP Department Description	SAP Function Description	Email	Phone
Edit Del	Test					(412) 555-1212

Opportunities [New Opportunity](#) [Opportunities Help](#)

Action	Opportunity Name	Stage	Amount	Close Date	Next Step	Status Comments
Edit Del	Summa Test Lead1-	Qualified Opportunity		3/31/2012		

Cases [New Case](#) [Cases Help](#)

No records to display

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

Action	Subject	Name	Related To	Task	Due Date	Status	Priority	Assigned To
Edit Cls	test	Test	Summa Test Lead1-	<input checked="" type="checkbox"/>		Not Started	Normal	Art Schrage

Activity History [Log A Call](#) [Mail Merge](#) [Send An Email](#) [View All](#) [Activity History Help](#)

NEW CONTACT

Contact Edit Save Save & New Cancel

Contact Information

Contact Owner: Art Schrage

Lead Source: Internet

Account Name: HarvestGold Funeral Hon

First Name: -None-- Steve

Last Name: Lippock

Title: CEO

Department:

Reports To:

Phone: (412) 355-6789

Home Phone: (412) 987-6567

Mobile: (412) 355-6456

Other Phone: (412) 342-5647

Fax: (412) 987-6543

Email: bjt@hgfh.com

Assistant: Betty

Asst. Phone: (412) 678-5631

Asst Email: betty@hgfh.com

Description Information

Description: Huge Pittsburgh Steeler and Penguin fan

Address Information Copy

Mailing Street: 110 Harvest Lane

Mailing City: Pittsburgh

Mailing State/Province: PA

Mailing Zip/Postal Code: 15222

Mailing Country: US

Other Street: 110 Harvest Lane

Other City: Pittsburgh

Other State/Province: PA

Other Zip/Postal Code: 15222

Other Country: US

Account Name
& other fields
automatically
populate!

Complete as much information as available

ACCOUNT & CONTACT EXERCISE

- Edit the Account you Converted from Lead...add the following information
 - Type = Prospect
 - Parent Account = Acme Funeral Homes
 - Cremation Account Goal = \$50,000

Complete all other fields with anything that makes sense

Create a New Contact

Any values for fields are fine

RECORD CREATION RULES

1. Create Leads from Scratch
2. Create Accounts from Scratch
(or from a Converted Lead)
3. Create Contacts from Account
4. Create Opportunities from the Contact
5. Create Activities from the Contact or the Opportunity
6. View Orders Information from the Account

Always
SEARCH BEFORE CREATING
a New Lead, Account, or
Contact Record



ACTION PLAN

Time to practice on your own, raise hand if you have a question for the instructor.