Getting Started with SalesForce CRM

Getting Started with SALESFORCE Part XIV

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for SalesForce. The document focuses on SalesForce CRM. Join our professional training program and learn from experts.

History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Chandra Prakash Sharma	
0.1	Review#1		

Contents

What is CRM in Sales Force

Salesforce.com provides enterprise cloud computing applications such as customer and collaboration relationship management (CRM) to businesses of various sizes and industries. CRM cloud apps provide real-time visibility into their team's activities so they can forecast sales with confidence. For sales reps, CRM cloud apps make it easy to manage customer information so reps spend less time handling data and more time with customers.

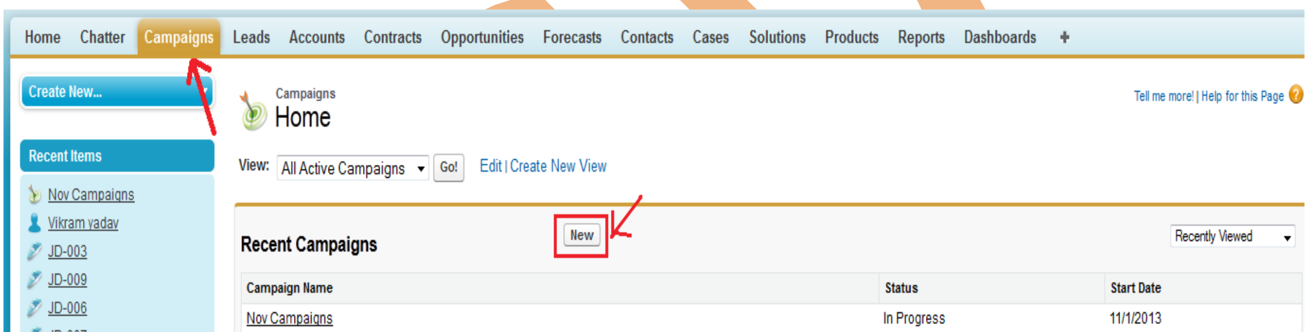
1. Campaigns :

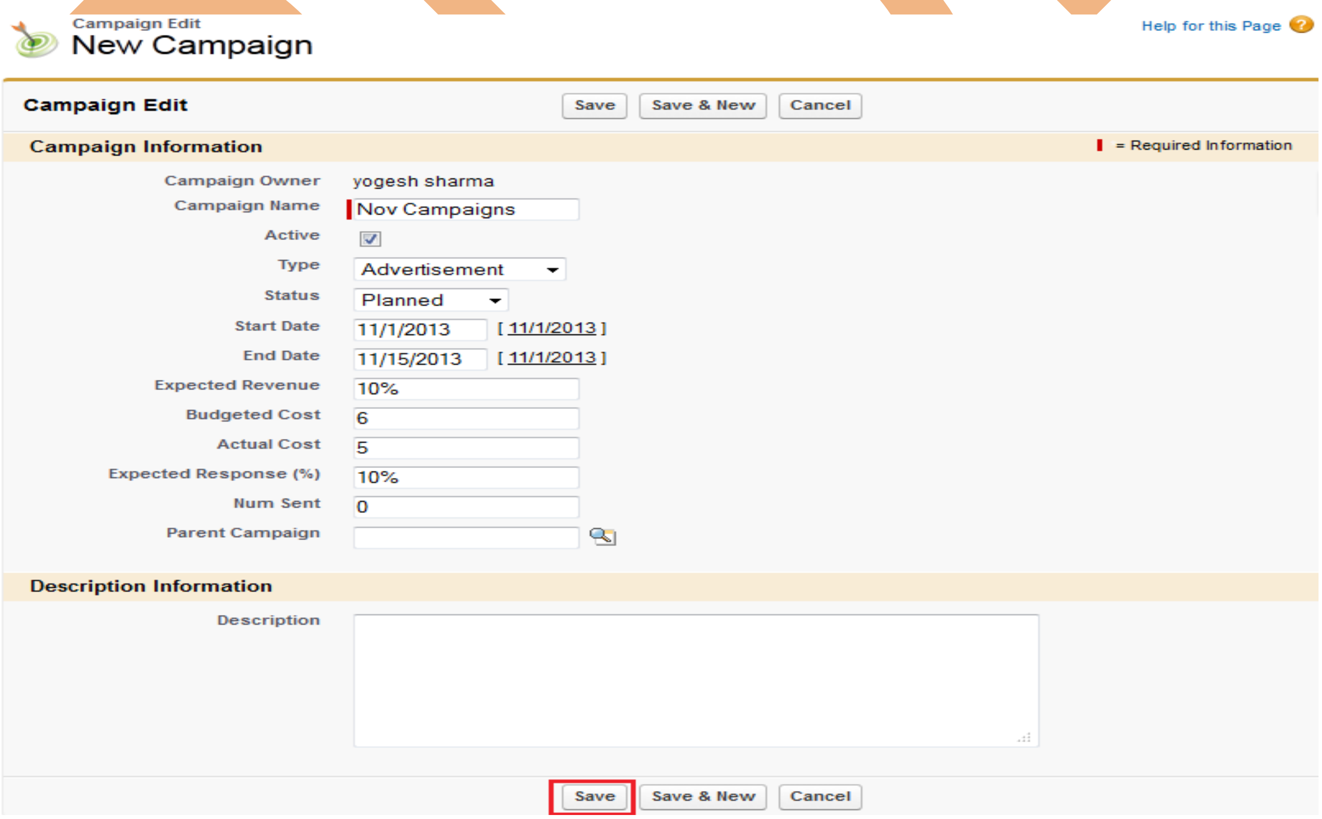
A campaign is an outbound marketing project that you want to plan, manage, and track within SalesForce. It can be a direct mail program, seminar, print advertisement, email, or other type of marketing initiative. You can organize campaigns into hierarchies for easy analysis of related marketing tactics.

Example :-
if plan want to sell new cell phone in market. firstly introduce this cell phone in market you need to marketing of this phone. In marketing you can use advertisement, news paper, road show etc. You can all process manage by Campaigns. You can see below.

How To Create Campaigns :

Click on **Campaigns** Tab then click on **New** button.



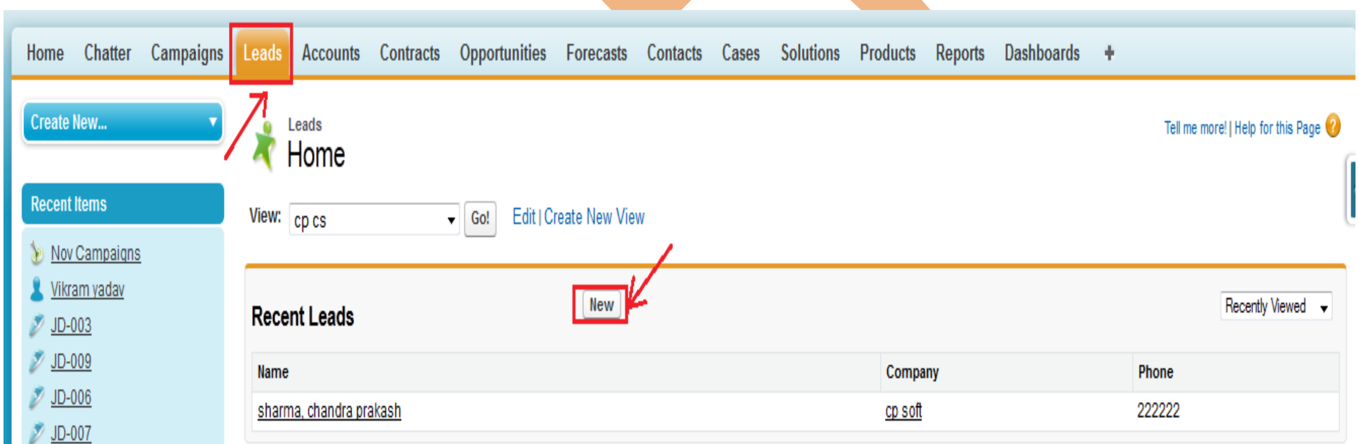


2. Leads :

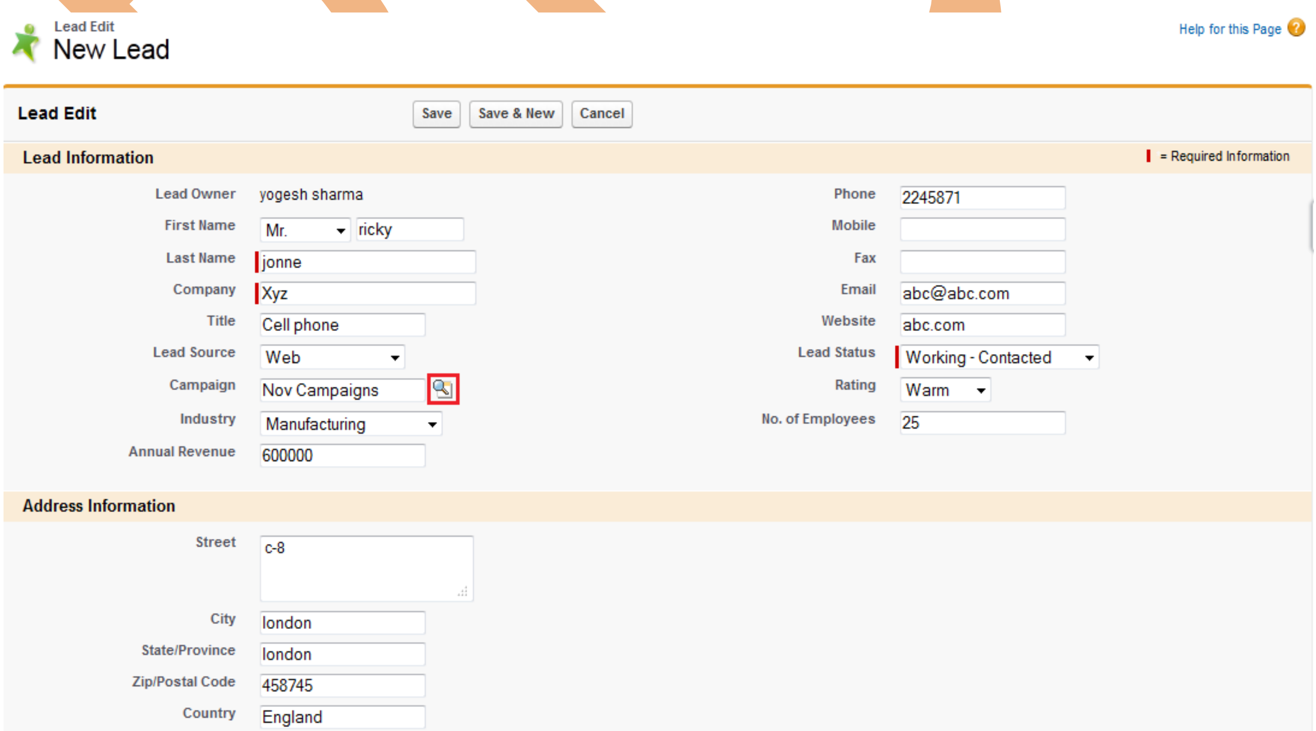
SalesForce is a CRM software company, which allows its users to keep track of correspondence, data and sales for their business contacts in 1 place.
Carefully managing leads before they convert into accounts, contacts and opportunities can result in a more streamlined selling process, with sales reps working more productively and efficiently.

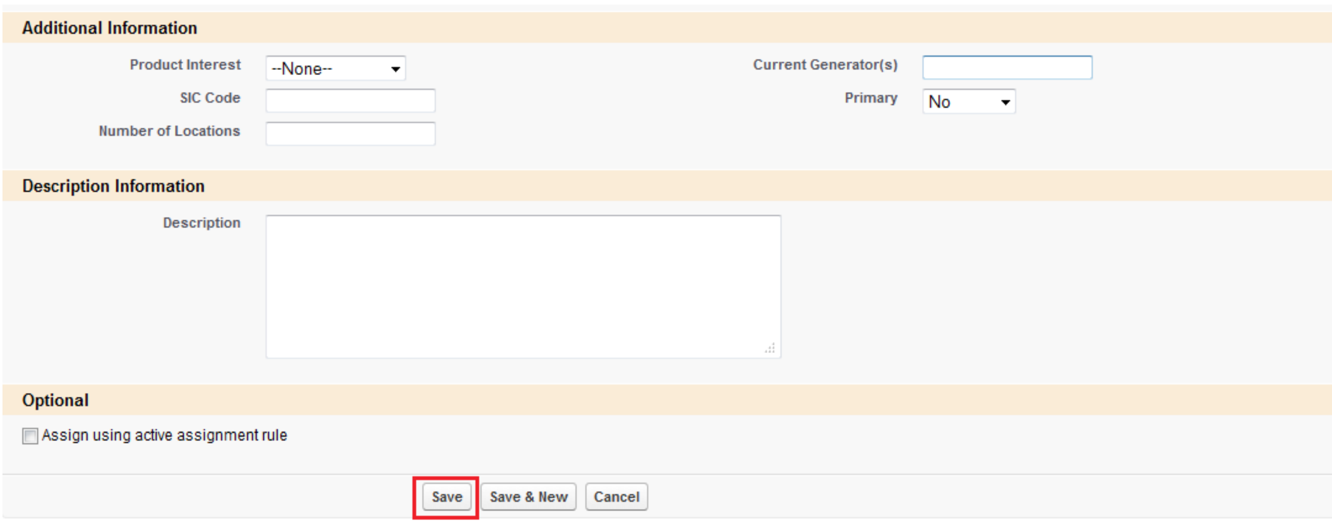
How To create Leads :

After login you can see some tab there is one tab is **Leads** click on this tab after then click on **New** button.



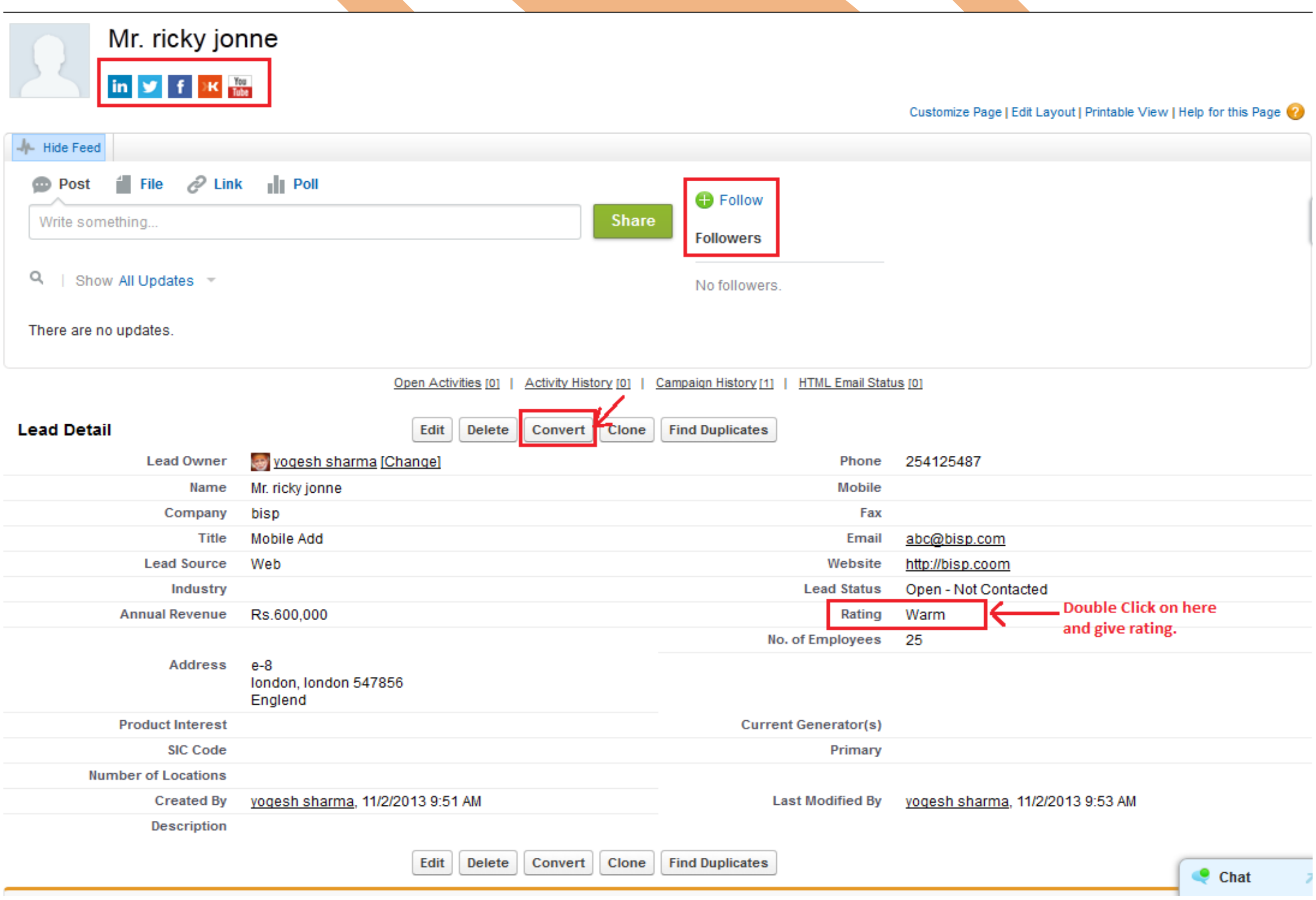
Step 1 :-



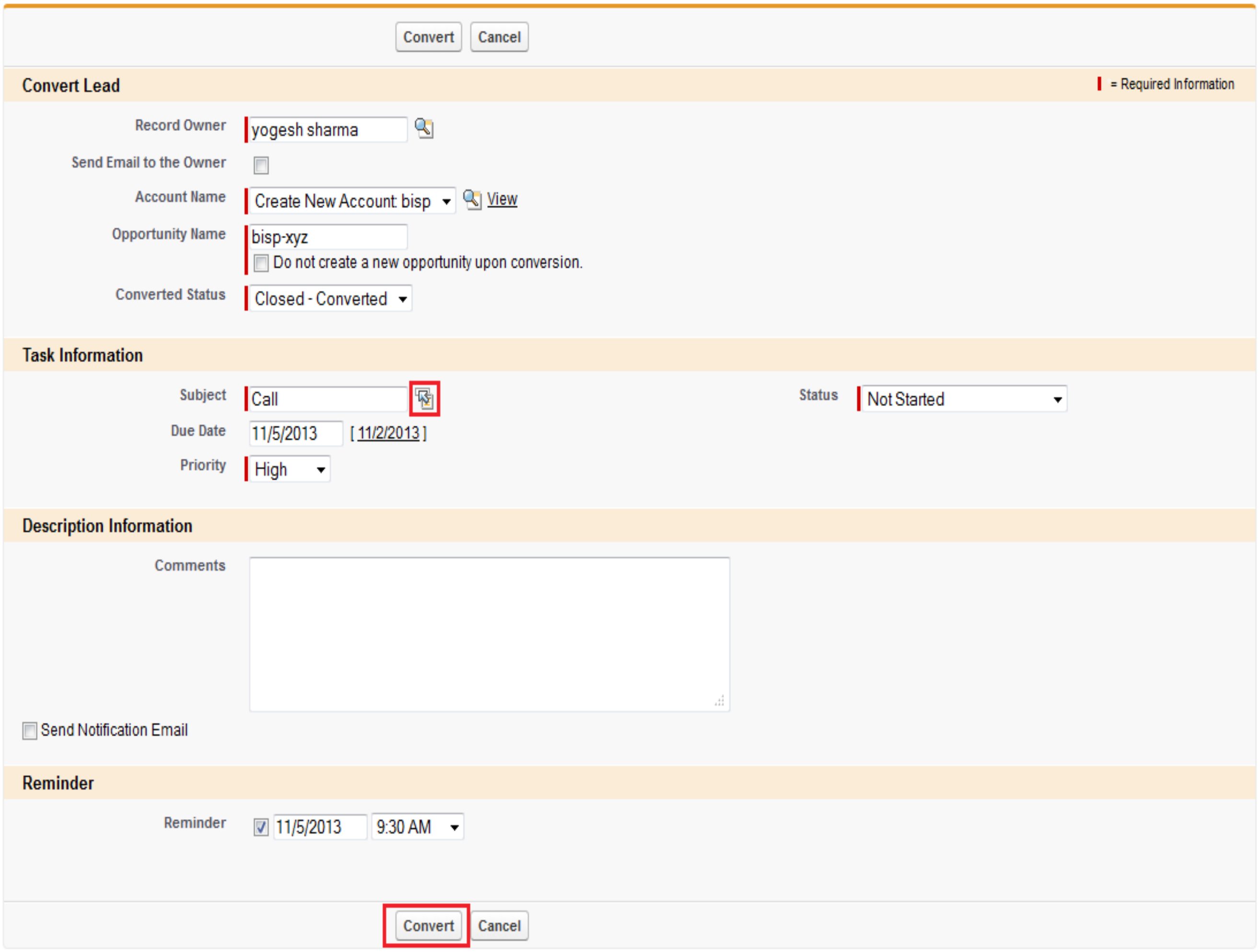


Step 2 :-

After Click Save button you can see new page on this page click on Follow link button. Leads can be converted to accounts click on **Convert** button.



Step 3 :-
Leads can be converted to accounts, contacts, opportunities, and followup tasks.
You should only convert a lead once you have identified it as qualified.
After this lead has been converted, it can no longer be viewed or edited as a lead, but can be viewed in lead reports.

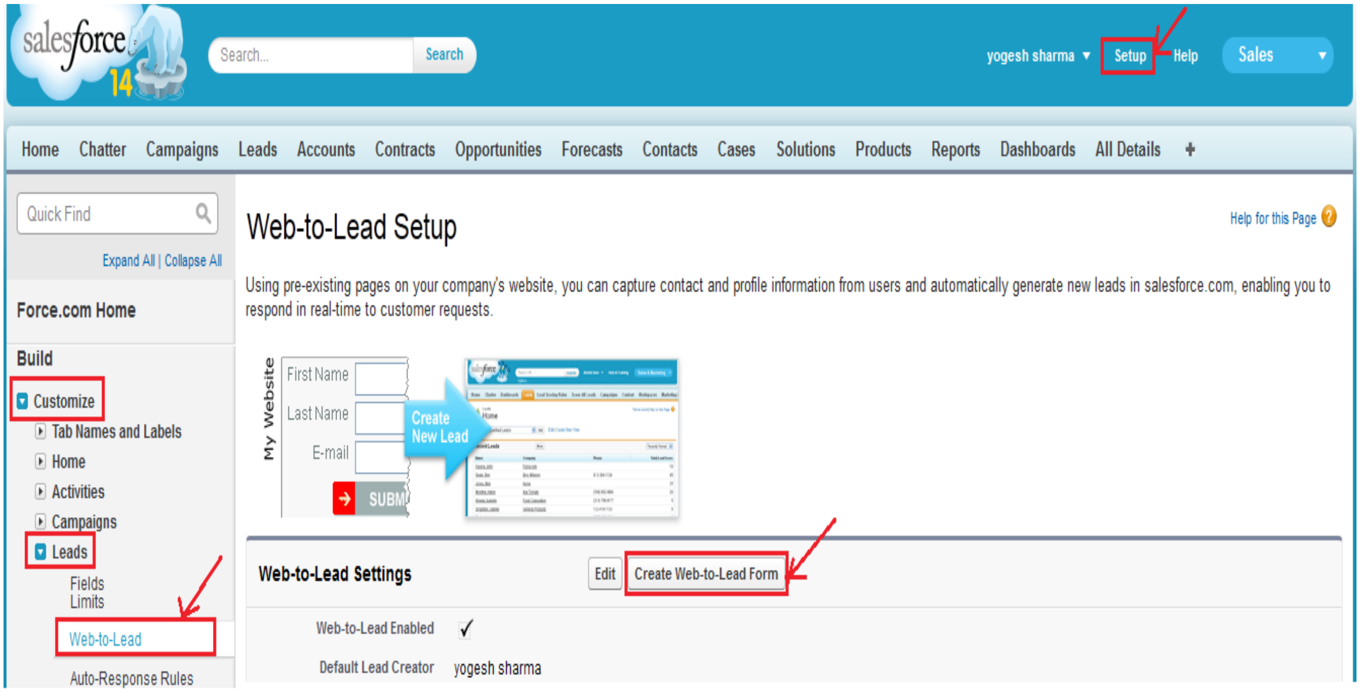


Web-to-Lead Setup

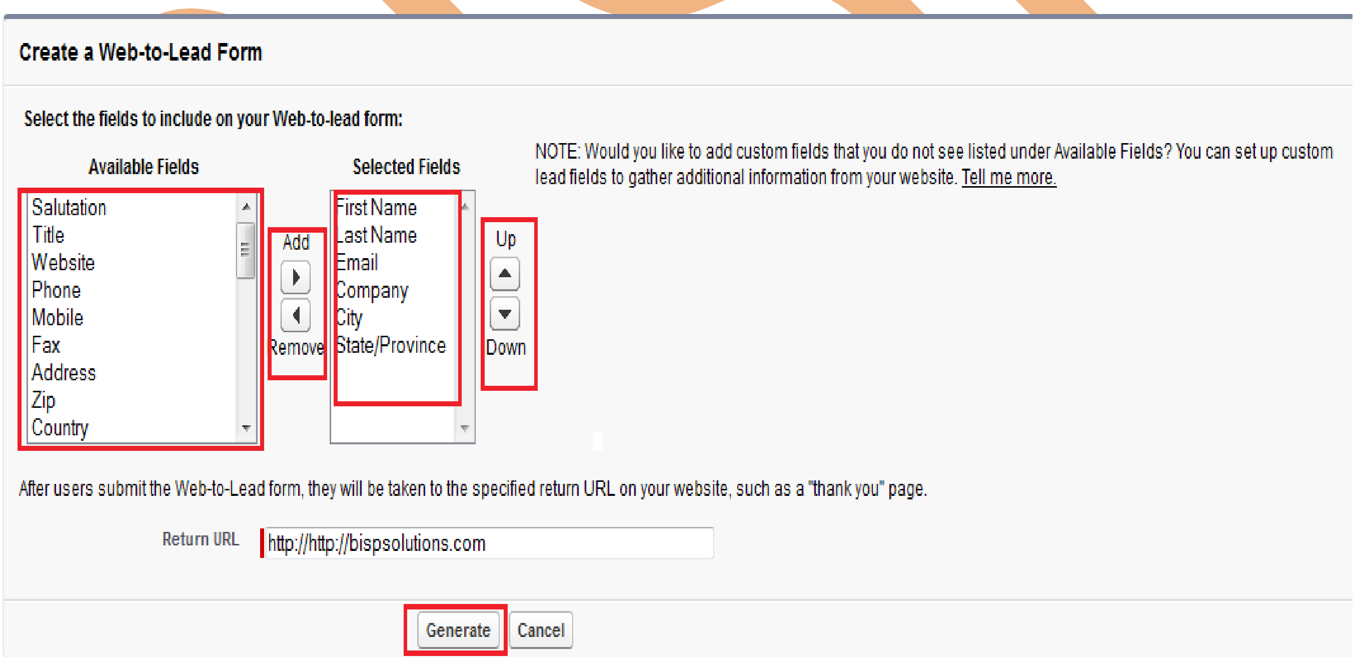
Using pre-existing pages on your company's website, you can capture contact and profile information from users and automatically generate new leads in salesforce.com, enabling you to respond in real-time to customer requests.

How To Go Web-to-Lead Setup :

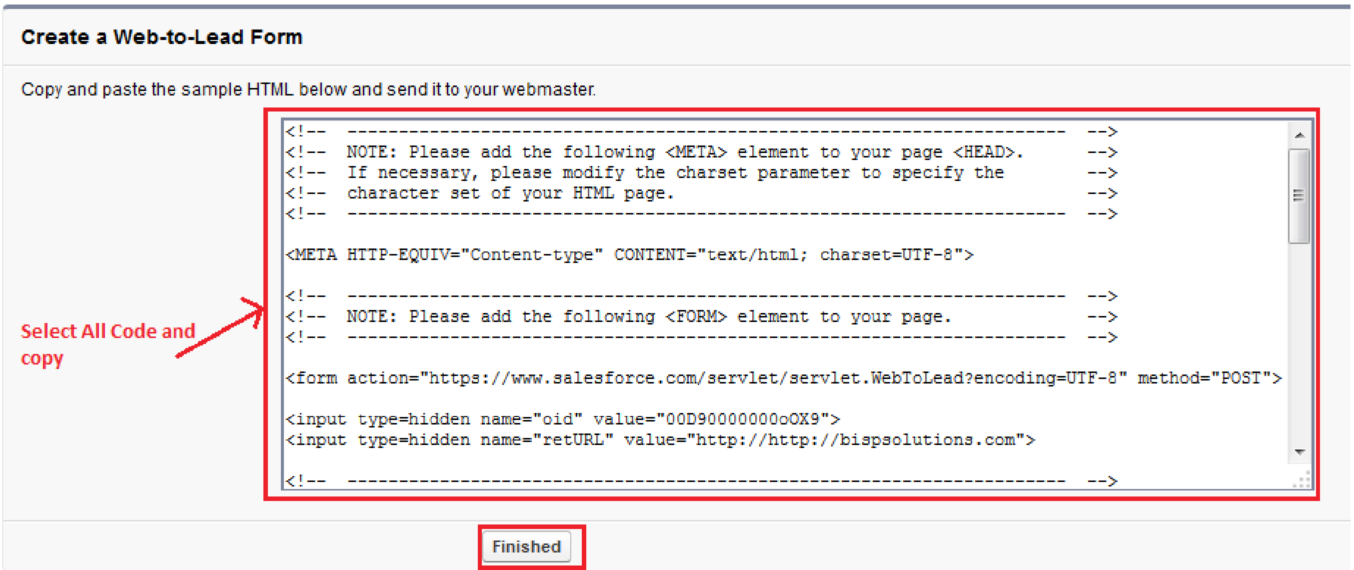
Click **Setup** -> **Customize** -> **Web-to-Lead**



Step 1 :- Select Fields in available list click on add button enter Return URL name then click on Generate button.



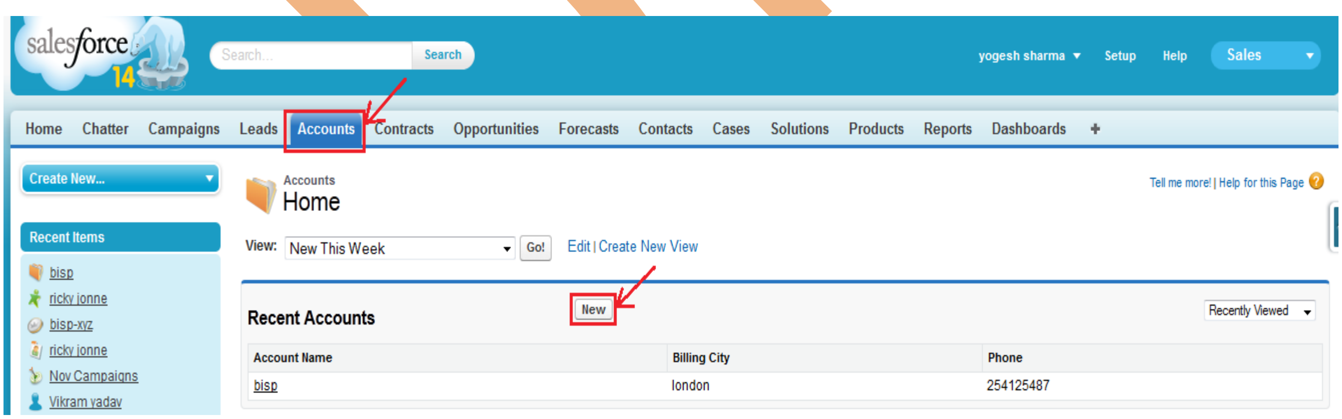
Step 2 :-
Select all code and copy and paste with in <html> There is paste all code </html> after paste this code makthis code all you can add any web page for advertisement.



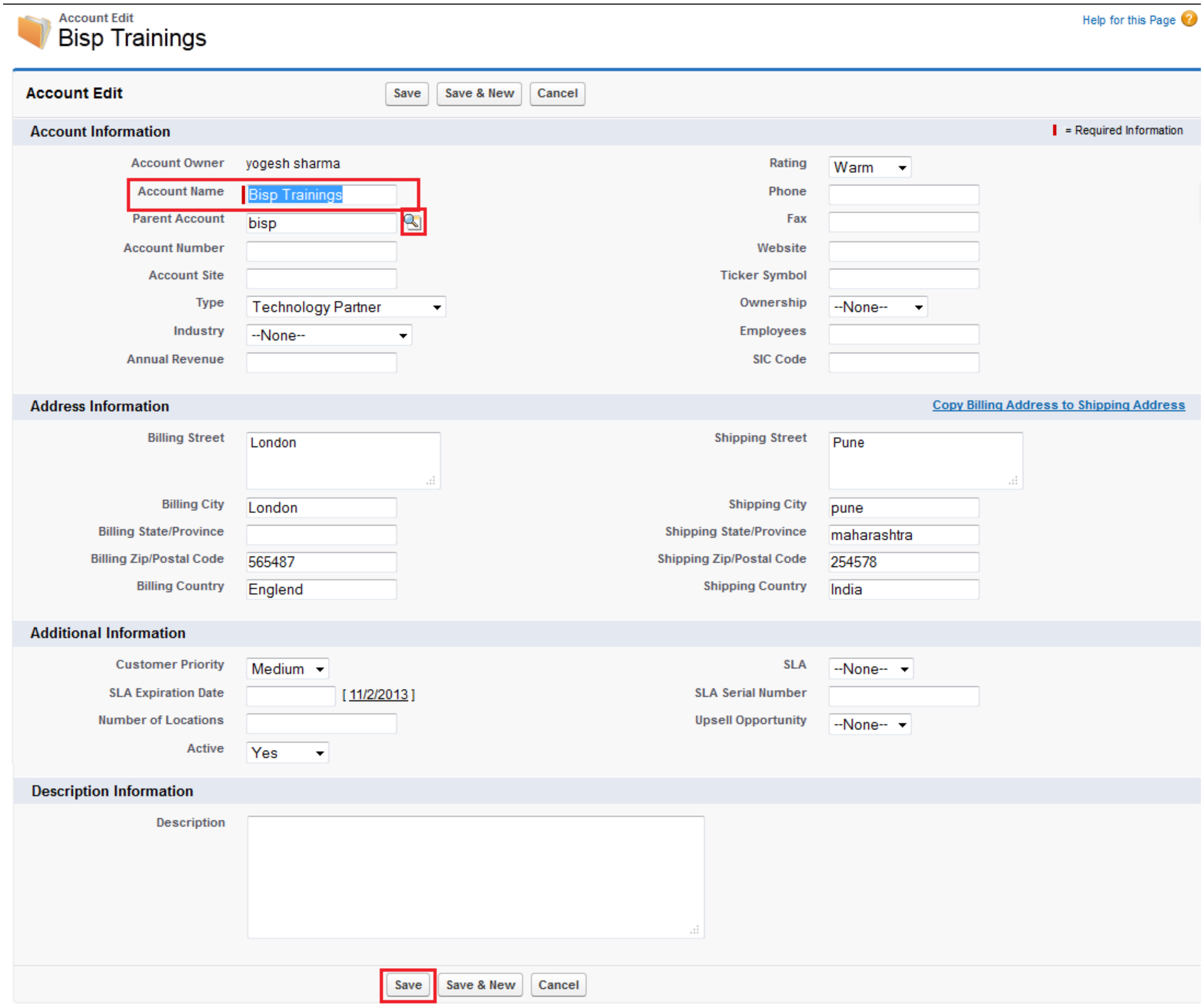
3. Accounts :

SalesForce provide to you manage your customers, organization Detail by using Accounts. Each account stores information such as name, address, and phone numbers. For each account, you can store related information such as opportunities, activities, cases, partners, contracts, and notes.

How to Create Accounts :
After login in SalesForce.com, Then
Click on **Accounts** Tabs > Click on **New** button.
you can see below.



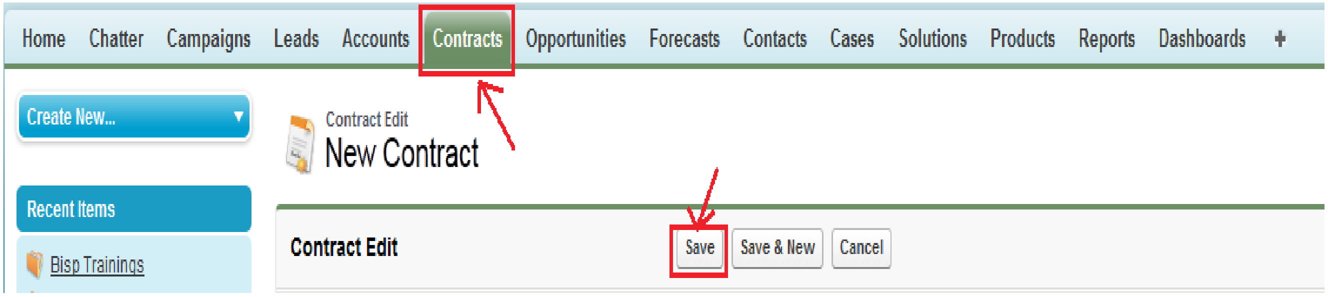
Step 1 :-
Fill all fields then click on Save button.



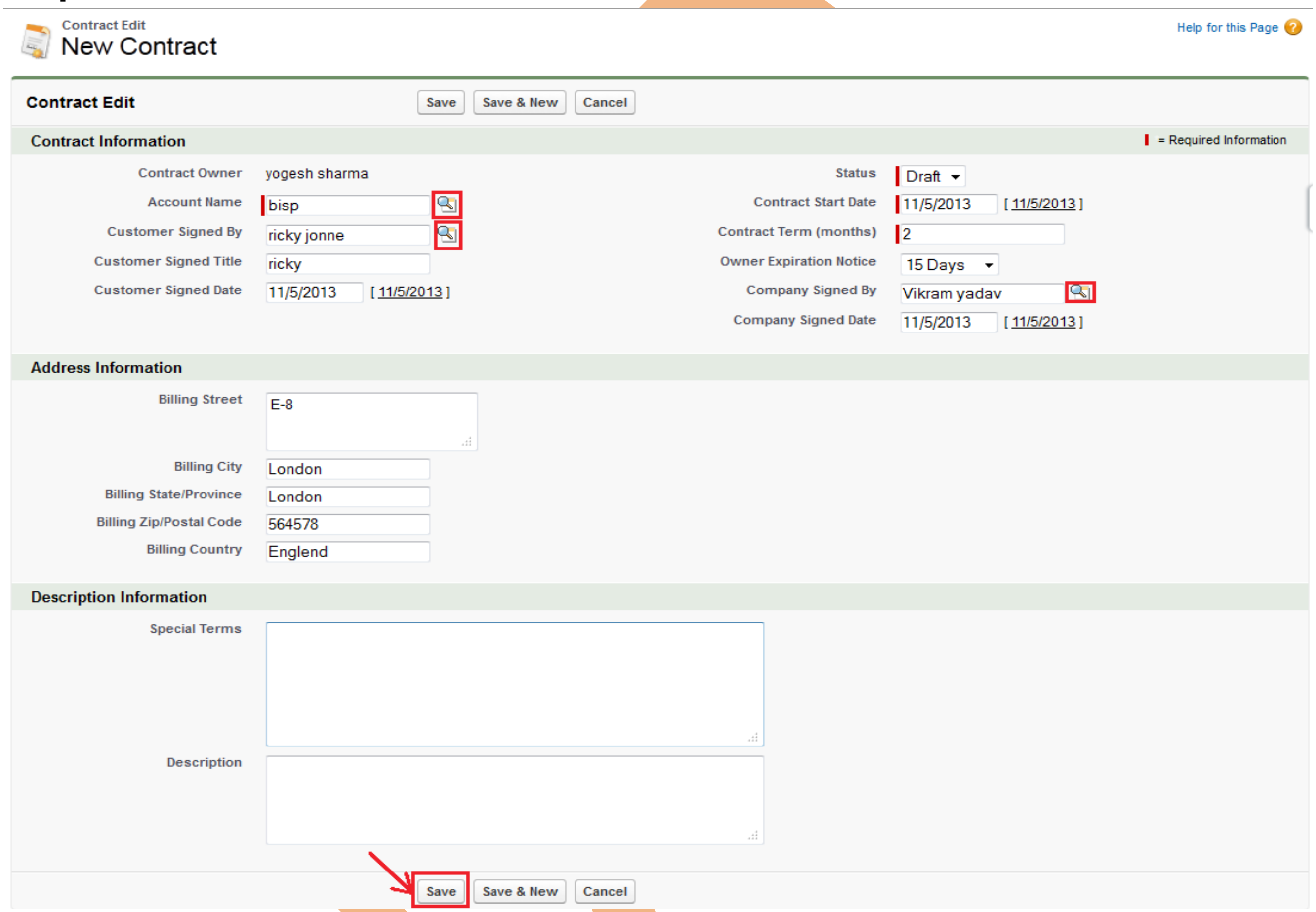
4. Contract :

Use SalesForce.com to handle your internal process for contracts, give users contract privileges, design contract status values for different stages in the contract life-cycle, and design page layouts for
different types of contract administrators.

How To Create Contracts in SalesForce.com :
Click on **Contracts** Tab then click on **New** button.



Step 1 :-



User Contact Privileges :-

Administrator's Profile Contains the following contact permissions :

User Permission on contracts - To create, edit, and contracts that are not yet activated.

Approve Contracts - To apply an approved status to a contacts.

Activate Contracts - To activate, create, edit, and delete contracts.

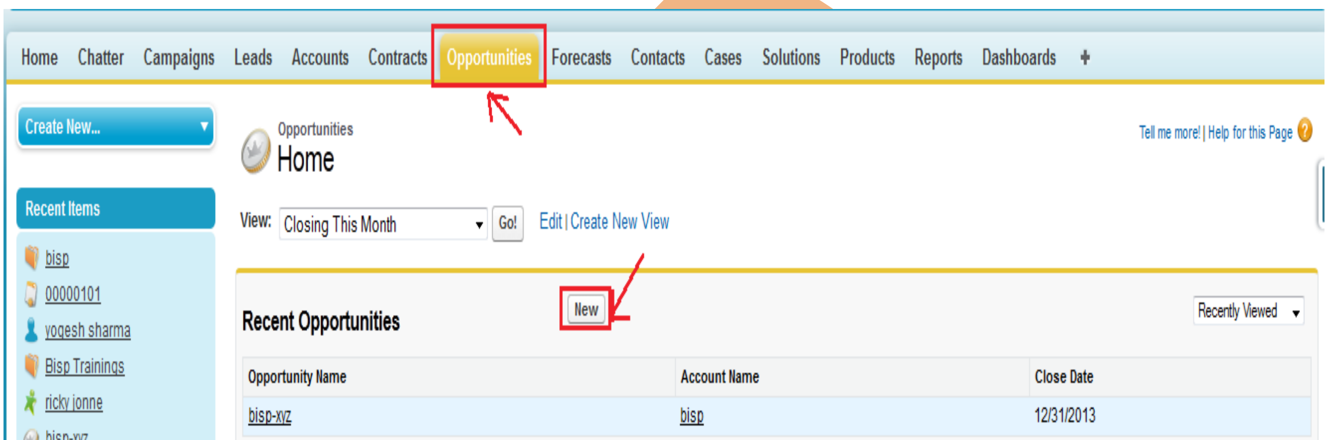
Delete Activated Contracts - To delete contracts regardless of status.

5. Opportunity :

Opportunity records display critical details about the deals your teams are working on, like how much each one is worth, who you're competing against, and what stage the deal is in. You can follow the opportunity feed to receive automatic updates via Chatter, plus track all associated activities as they happen to close deals faster.

How To Create Opportunity in SalesForce.com :

Click on **Opportunity** Tab then click on **New** button.

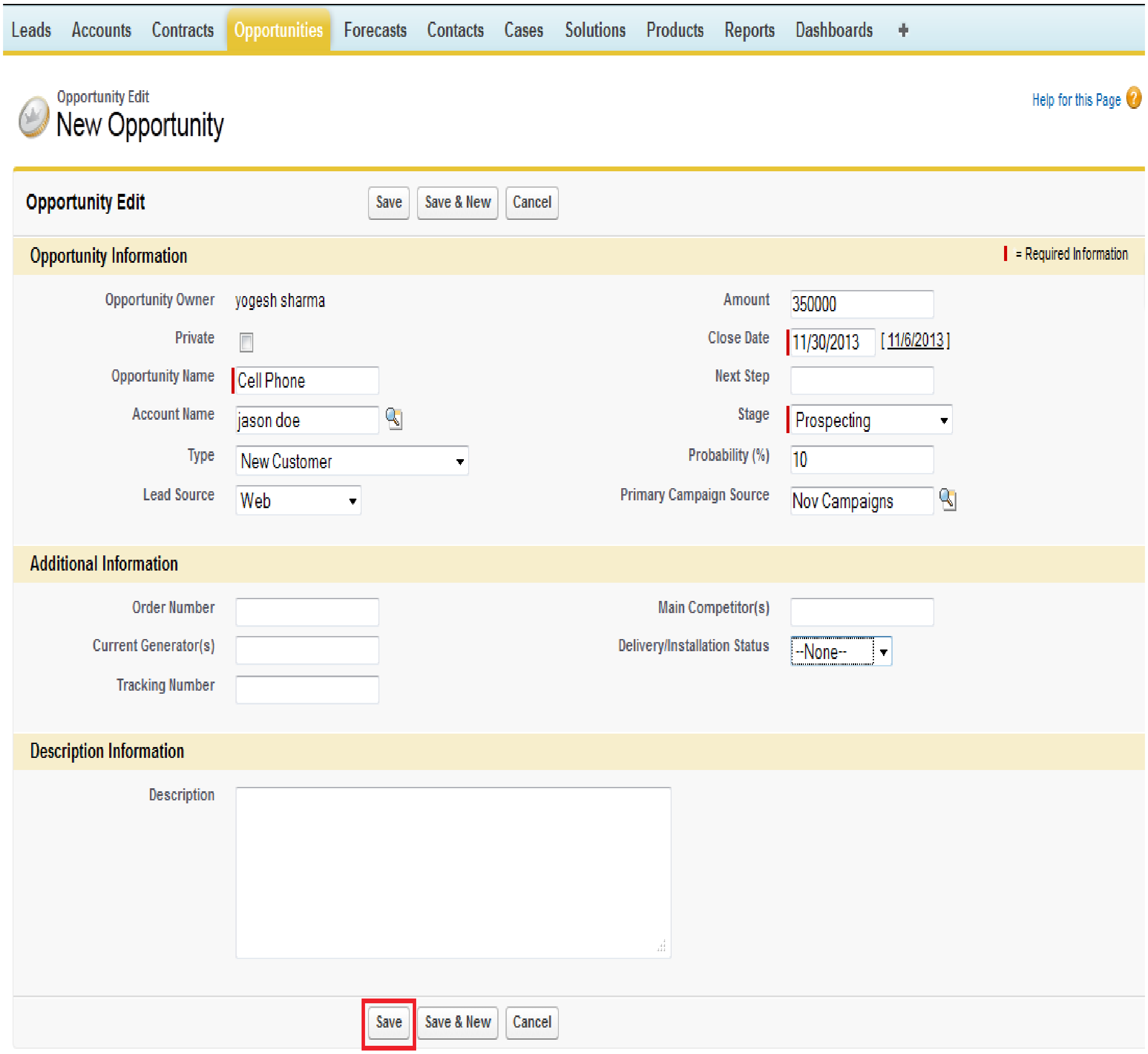


Adding Members to an Opportunity Team :

User Permissions Needed	
To add team members to an opportunity	"Read" on users AND "Read" on opportunities AND Owner of opportunity record, or above owner in your organization's role hierarchy.
To view an opportunity for which you're a team member	"Read" on the opportunity.

1. Open the opportunity and navigate to the Opportunity Team related list, then click Add.
2. Enter the member’s name in the User column. If the partner portal is enabled, choose whether the member is a Partner User or User, and then enter the member’s name.
3. When you add an opportunity team member, the member is automatically granted read access to the associated account.
4. Select the member’s opportunity team role.
5. Select the member’s opportunity access level. The access level can’t be less than your organization’s default opportunity sharing access.

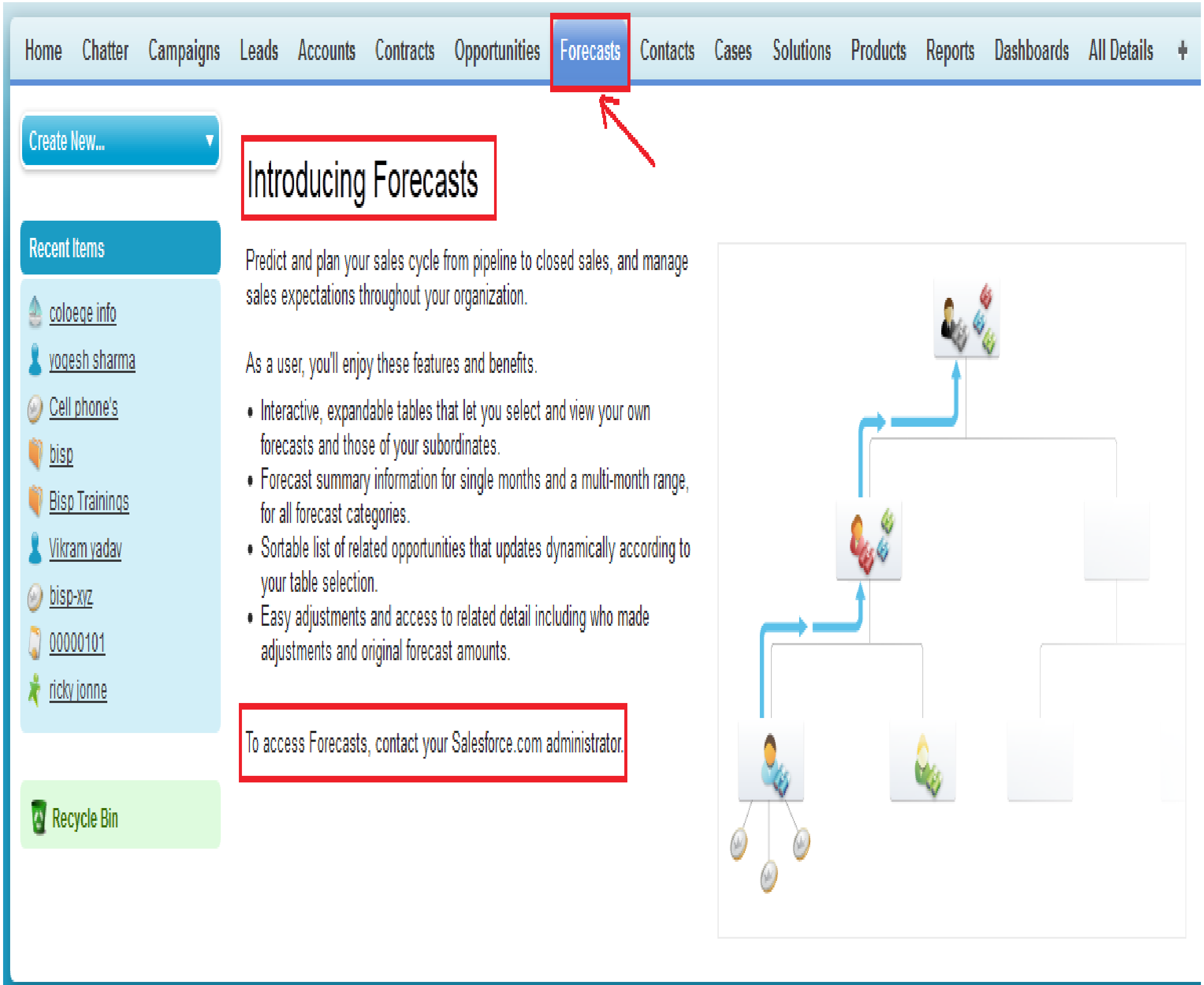
6. Specify values for any custom fields that your administrator has created for opportunity teams.
7. Click Save.



6. Forecasts :

Predict and plan the sales cycle from pipeline to closed sales, and manage sales expectations throughout the organization with Forecasts. A forecast is an expression of expected sales revenue based on the gross rollup of a set of opportunities. Forecasts include adjustments made by forecast users to their subordinates' forecasts as well as adjustments made by these subordinates on the forecasts of the users below them in the forecast hierarchy. In the rollup table on the forecasts page, forecasts are organized by forecast category, time period, and optionally by product family.

Click on Forecasts Tab

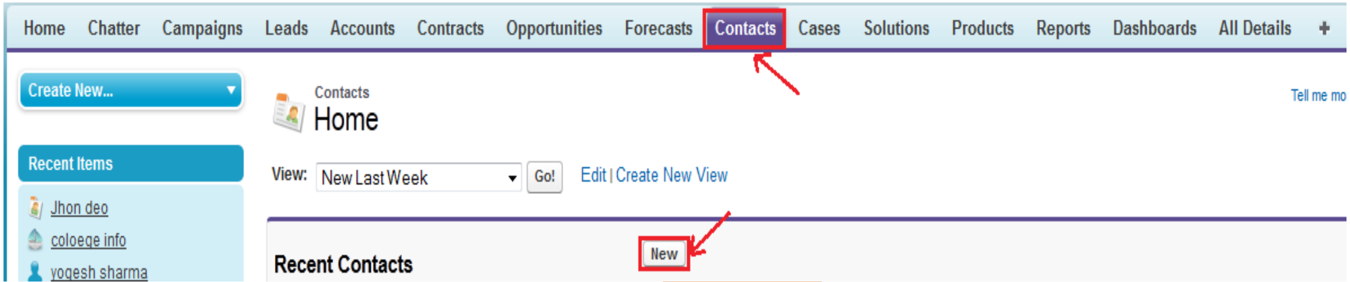


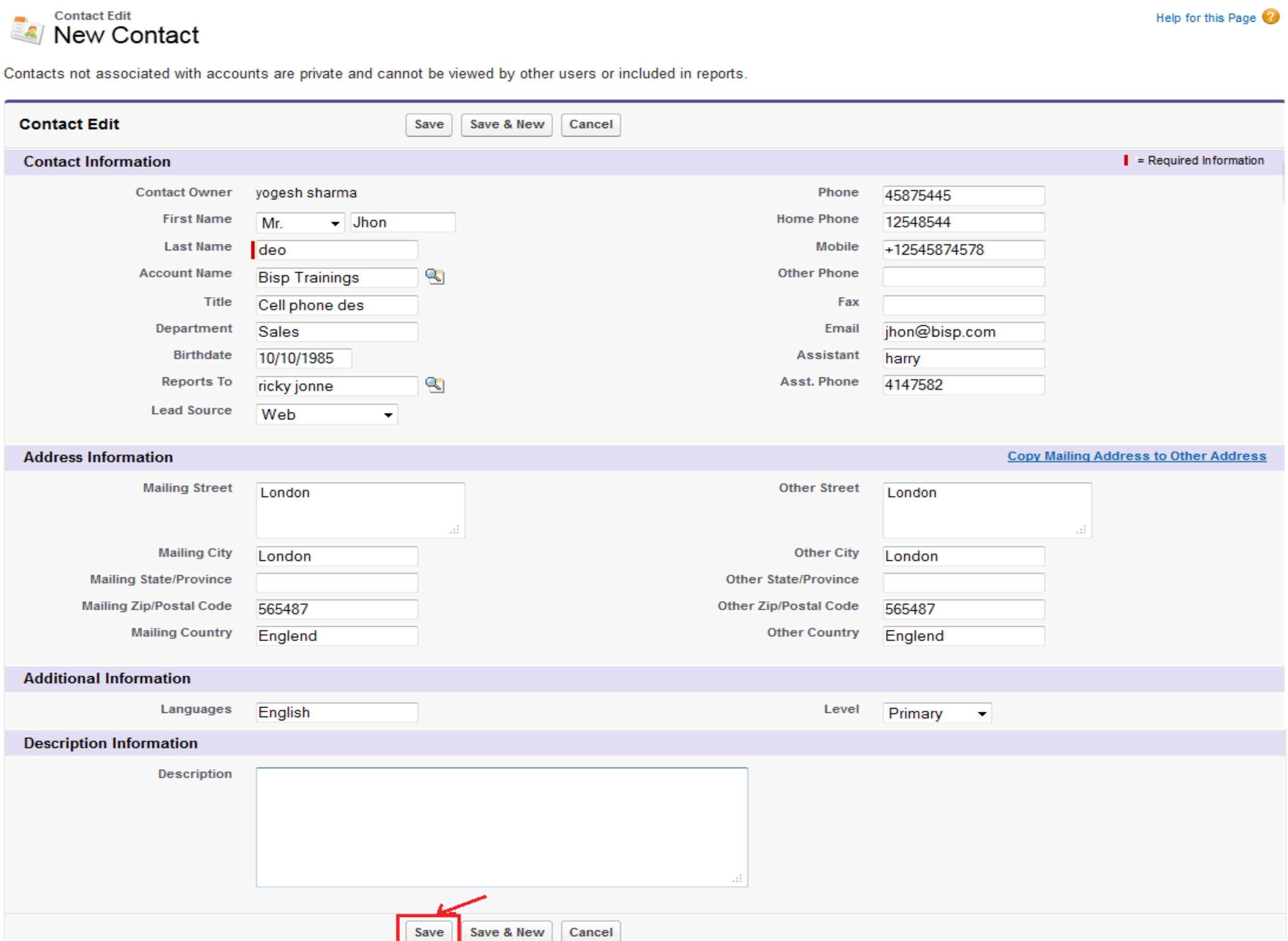
7. Contacts :

In SalesForce.com Contact you can store complete information of your customer with everything you need in one place—including account history
key contacts, customer communications, and internal account discussions. Gain insight into activity on
social media sites like Facebook ,LinkedIn and Twitter so you always know what your customers "like,"
making it easy to build stronger, longer-lasting relationships and close more deals.

How To Create Contact in SalesForce.com :

Click on Contacts Tab then click on New button.

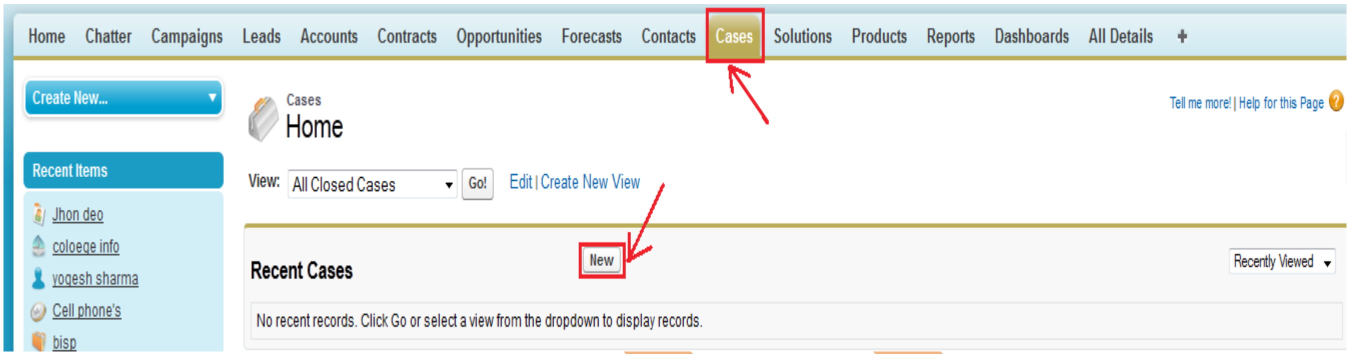




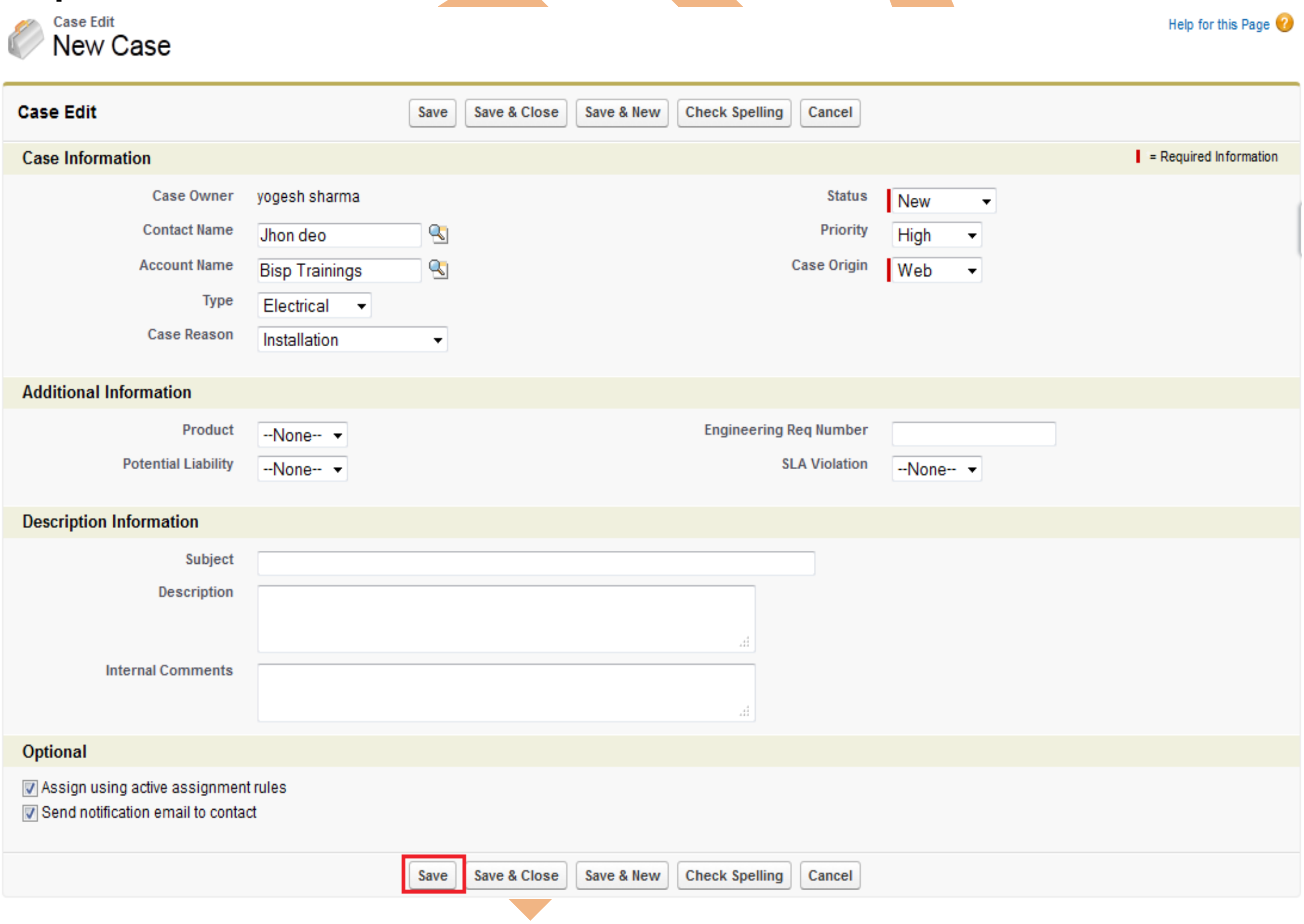
8. Cases :

A case is a description of a customer's problem, feedback, or question. Use cases to track and solve your customers' issues. You can quickly create, edit, locate, and view cases from the Cases tab. To gather customer feedback from your company's website and customer emails.

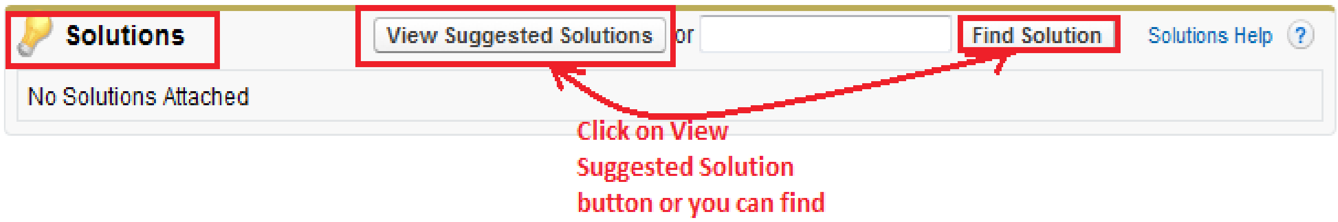
How To Create Case :



Step 1 :-

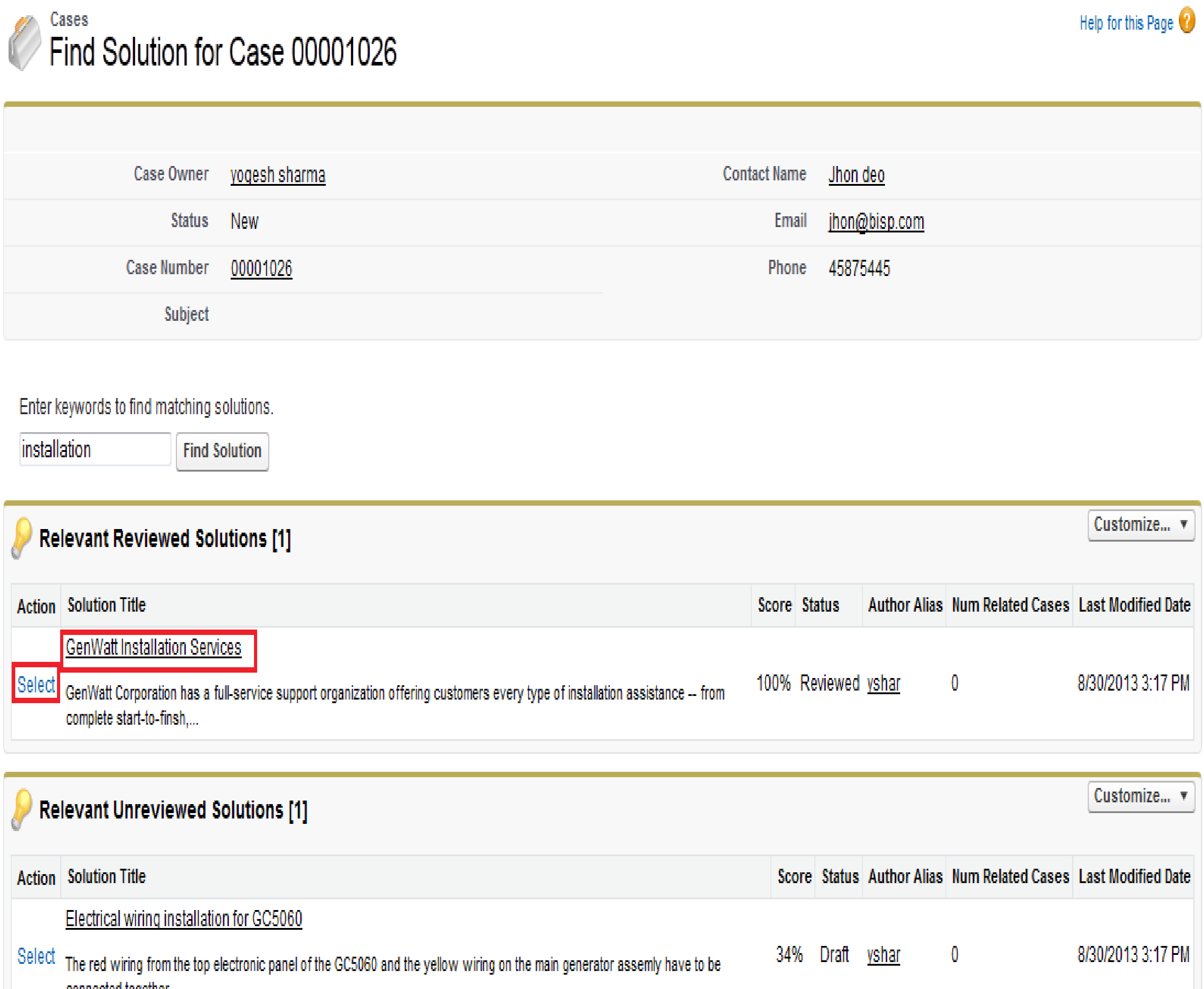


After click on save button then you can see new web page you can see below. There is you can find solution for cases.



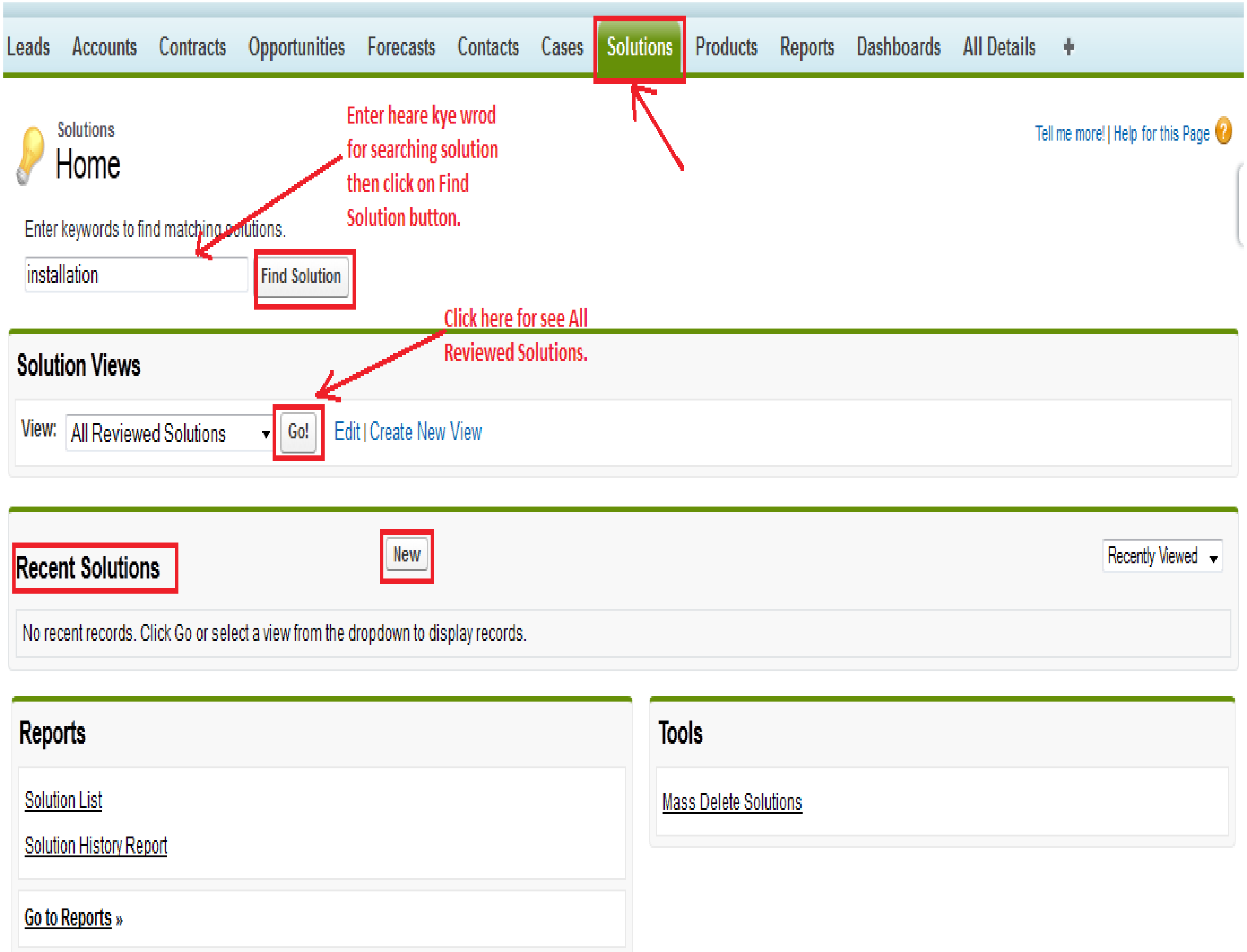
Step 2 :-

Click on **Select** link



9. Solutions :

With SalesForce CRM solutions and our cloud-computing model, you can mind your customers and your budget at the same time. Our business CRM products include applications for critical areas of your business like sales and customer service. There's no need to seek individual CRM solutions for sales force automation, customer service, partner management, marketing and campaign management, etc. SalesForce.com CRM solutions provide everything in one neat package.



You can find solution click on Find solution button and if you want to see all Reviewed Solution click on Go button in solution views section. and all so you can create recent Solutions list click on New button.