



Getting Started with Salesforce CRM

Getting Started with SALESFORCE Part XIV

Description:

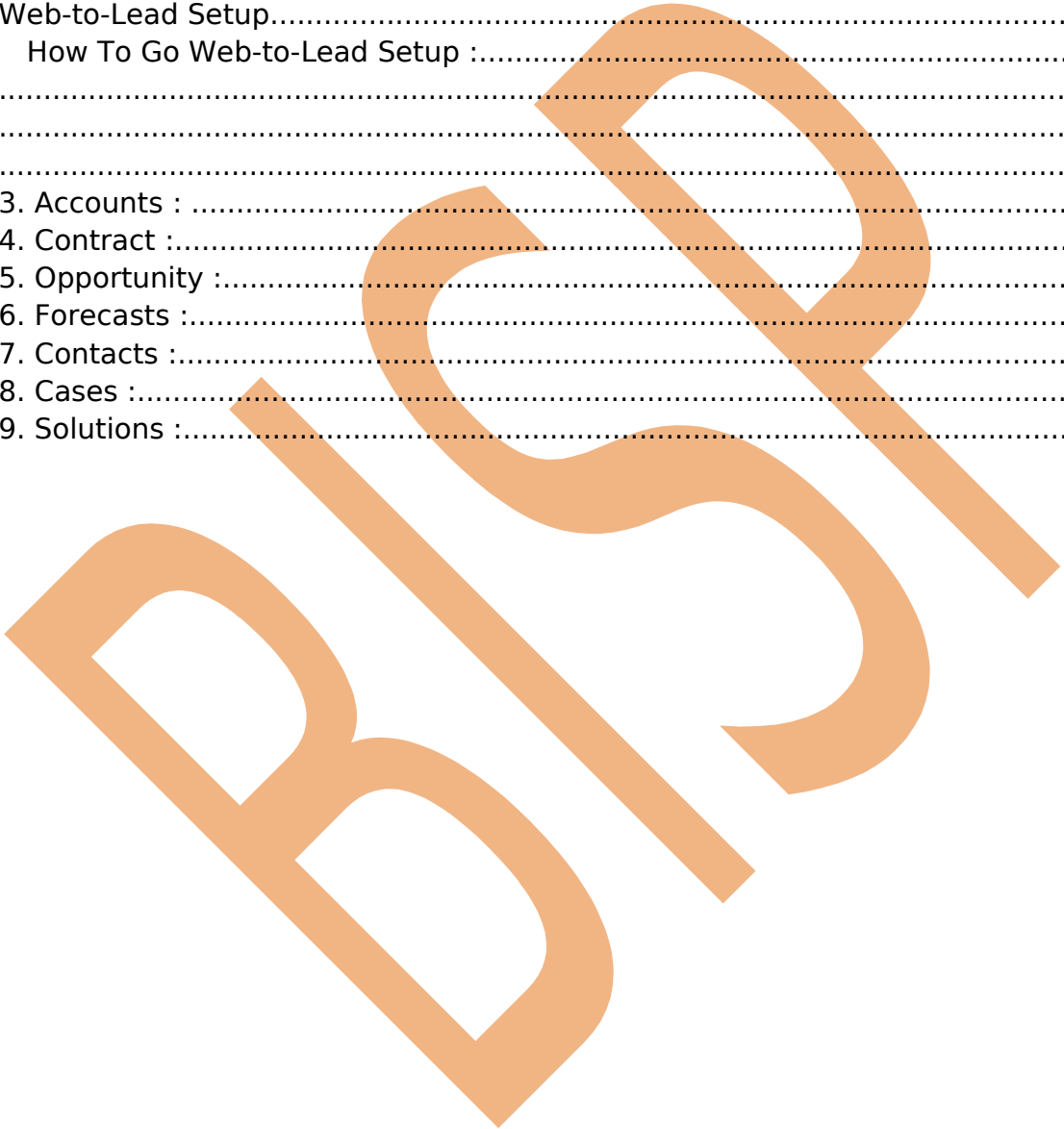
BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for Salesforce. The document focuses on Salesforce CRM. **Join our professional training program and learn from experts.**

History:

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

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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.

The screenshot shows the Salesforce interface for managing campaigns. At the top, the navigation bar includes tabs for Home, Chatter, Campaigns, Leads, Accounts, Contracts, Opportunities, Forecasts, Contacts, Cases, Solutions, Products, Reports, and Dashboards. The 'Campaigns' tab is selected. Below the navigation bar, there is a 'Create New...' button and a 'Recent Items' list containing 'Nov Campaigns', 'Vikram vadav', 'JD-003', 'JD-009', 'JD-006', and 'JD-007'. The main content area displays 'Recent Campaigns' with a 'New' button highlighted by a red box and arrow. Below this, the 'Campaign Edit' form is shown, containing fields for Campaign Information and Description Information. The 'Campaign Information' section includes fields for Campaign Owner (yogesh sharma), Campaign Name (Nov Campaigns), Active (checked), Type (Advertisement), Status (Planned), Start Date (11/1/2013), End Date (11/15/2013), Expected Revenue (10%), Budgeted Cost (6), Actual Cost (5), Expected Response (%) (10%), Num Sent (0), and Parent Campaign. The 'Description Information' section has a large text area for the Description. At the bottom of the form, there are 'Save', 'Save & New', and 'Cancel' buttons, with the 'Save' button highlighted by a red box.

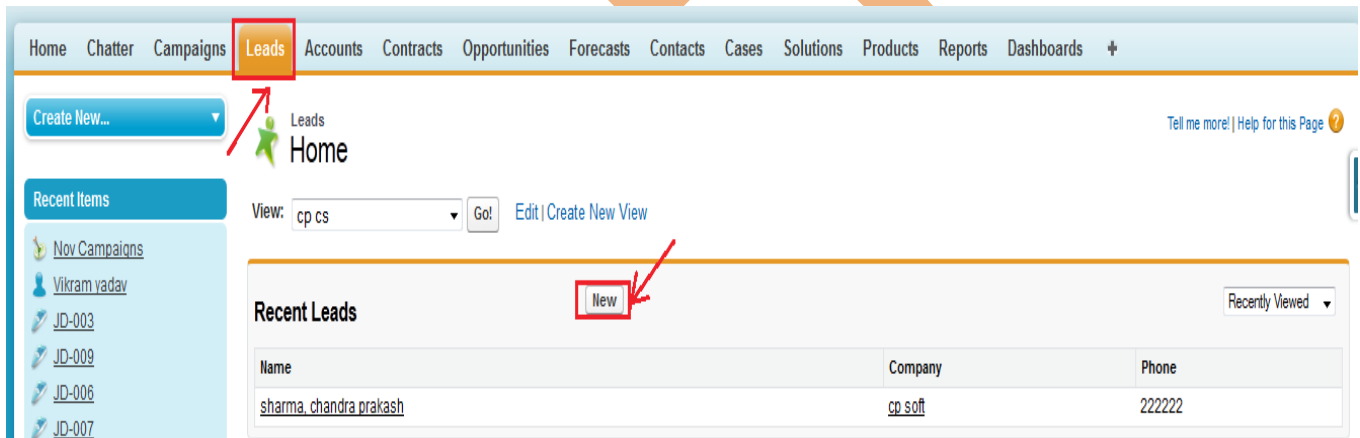
2. Leads :

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 :

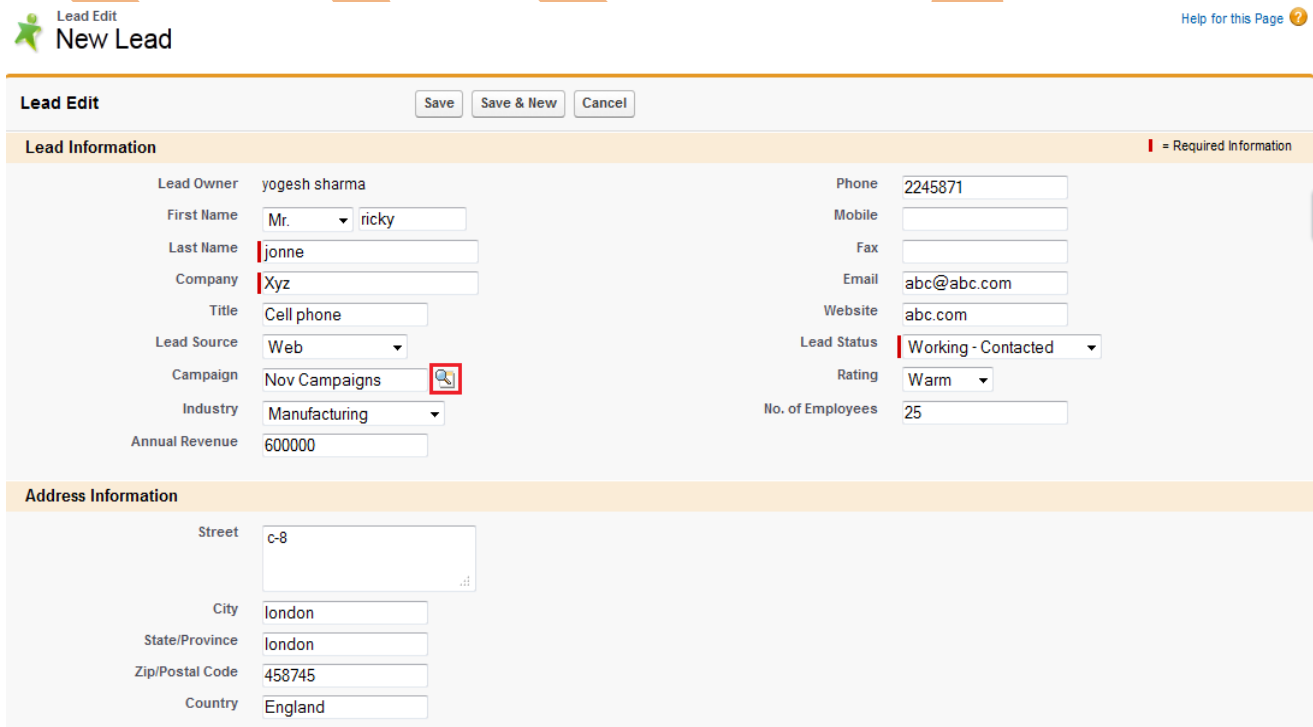
After login you can see some tab there is one tab is **Leads** click on this tab after then click on **New** button.



The screenshot shows the Salesforce navigation bar with tabs for Home, Chatter, Campaigns, Leads, Accounts, Contracts, Opportunities, Forecasts, Contacts, Cases, Solutions, Products, Reports, and Dashboards. The 'Leads' tab is highlighted with a red box and an arrow. Below the navigation bar, there is a 'Create New...' button and a 'Recent Items' list. The 'Recent Leads' section is visible, showing a table with columns for Name, Company, and Phone. A 'New' button is highlighted with a red box and an arrow.

Name	Company	Phone
sharma, chandra prakash	cp soft	222222

Step 1 :-



The screenshot shows the 'New Lead' form in Salesforce. The form is titled 'Lead Edit' and has buttons for 'Save', 'Save & New', and 'Cancel'. The form is divided into two sections: 'Lead Information' and 'Address Information'. The 'Lead Information' section contains fields for Lead Owner, First Name, Last Name, Company, Title, Lead Source, Campaign, Industry, Annual Revenue, Phone, Mobile, Fax, Email, Website, Lead Status, Rating, and No. of Employees. The 'Address Information' section contains fields for Street, City, State/Province, Zip/Postal Code, and Country. A red box highlights the 'Campaign' field in the 'Lead Information' section.

Lead Information

Lead Owner: yogesh sharma
First Name: Mr. ricky
Last Name: jonne
Company: Xyz
Title: Cell phone
Lead Source: Web
Campaign: Nov Campaigns
Industry: Manufacturing
Annual Revenue: 600000
Phone: 2245871
Mobile:
Fax:
Email: abc@abc.com
Website: abc.com
Lead Status: Working - Contacted
Rating: Warm
No. of Employees: 25

Address Information

Street: c-8
City: london
State/Province: london
Zip/Postal Code: 458745
Country: England

Additional Information

Product Interest: --None--
 SIC Code:
 Number of Locations:

Current Generator(s):
 Primary: No

Description Information

Description:

Optional

Assign using active assignment rule

Save Save & New Cancel

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.

Mr. ricky jonne

in | | | | |

Customize Page | Edit Layout | Printable View | Help for this Page

Hide Feed

Post | File | Link | Poll

Write something... Share Follow Followers

Show All Updates

No followers.

There are no updates.

Open Activities [0] | Activity History [0] | Campaign History [1] | HTML Email Status [0]

Lead Detail

Edit Delete **Convert** Clone Find Duplicates

Lead Owner	yoqesh sharma [Change]	Phone	254125487
Name	Mr. ricky jonne	Mobile	
Company	bisp	Fax	
Title	Mobile Add	Email	abc@bisp.com
Lead Source	Web	Website	http://bisp.coom
Industry		Lead Status	Open - Not Contacted
Annual Revenue	Rs.600,000	Rating	Warm
Address	e-8 london, london 547856 Englend	No. of Employees	25
Product Interest		Current Generator(s)	
SIC Code		Primary	
Number of Locations			
Created By	yoqesh_sharma, 11/2/2013 9:51 AM	Last Modified By	yoqesh_sharma, 11/2/2013 9:53 AM
Description			

Edit Delete Convert Clone Find Duplicates

Chat

Double Click on here and give rating.

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.

Convert Lead ! = Required Information

Record Owner

Send Email to the Owner

Account Name [View](#)

Opportunity Name
 Do not create a new opportunity upon conversion.

Converted Status

Task Information

Subject Status

Due Date [11/2/2013]

Priority

Description Information

Comments

Send Notification Email

Reminder

Reminder

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**

salesforce 14

Search... Search

yogesh sharma Setup Help Sales

Home Chatter Campaigns Leads Accounts Contracts Opportunities Forecasts Contacts Cases Solutions Products Reports Dashboards All Details +

Quick Find

Expand All | Collapse All

Force.com Home

Build

- Customize
- Tab Names and Labels
- Home
- Activities
- Campaigns
- Leads
- Fields Limits
- Web-to-Lead
- Auto-Response Rules

Web-to-Lead Setup

Help for this Page ?

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.

My Website

First Name
Last Name
E-mail
SUBMIT

Create New Lead

Web-to-Lead Settings

Edit Create Web-to-Lead Form

Web-to-Lead Enabled

Default Lead Creator yogesh sharma

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

Create a Web-to-Lead Form

Select the fields to include on your Web-to-lead form:

Available Fields		Selected Fields	
Salutation	Add	First Name	Up
Title		Last Name	
Website	Remove	Email	Down
Phone		Company	
Mobile		City	
Fax		State/Province	
Address			
Zip			
Country			

NOTE: Would you like to add custom fields that you do not see listed under Available Fields? You can set up custom lead fields to gather additional information from your website. [Tell me more.](#)

After users submit the Web-to-Lead form, they will be taken to the specified return URL on your website, such as a "thank you" page.

Return URL

Generate Cancel

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.

Create a Web-to-Lead Form

Copy and paste the sample HTML below and send it to your webmaster.

```
<!-- ----- -->
<!-- NOTE: Please add the following <META> element to your page <HEAD>. -->
<!-- If necessary, please modify the charset parameter to specify the -->
<!-- character set of your HTML page. -->
<!-- ----- -->

<META HTTP-EQUIV="Content-type" CONTENT="text/html; charset=UTF-8">

<!-- ----- -->
<!-- NOTE: Please add the following <FORM> element to your page. -->
<!-- ----- -->

<form action="https://www.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8" method="POST">
<input type="hidden" name="oid" value="00D900000000oOX9">
<input type="hidden" name="retURL" value="http://http://bispsolutions.com">
<!-- ----- -->
```

Select All Code and copy

Finished

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.

Account Name	Billing City	Phone
bisp	london	254125487

Step 1 :-

Fill all fields then click on Save button.

Account Edit Help for this Page ?

Bisp Trainings

Account Edit Save Save & New Cancel

Account Information = Required Information

Account Owner	yogesh sharma	Rating	Warm
Account Name	Bisp Trainings	Phone	
Parent Account	bisp	Fax	
Account Number		Website	
Account Site		Ticker Symbol	
Type	Technology Partner	Ownership	--None--
Industry	--None--	Employees	
Annual Revenue		SIC Code	

Address Information [Copy Billing Address to Shipping Address](#)

Billing Street	London	Shipping Street	Pune
Billing City	London	Shipping City	pune
Billing State/Province		Shipping State/Province	maharashtra
Billing Zip/Postal Code	565487	Shipping Zip/Postal Code	254578
Billing Country	Englend	Shipping Country	India

Additional Information

Customer Priority	Medium	SLA	--None--
SLA Expiration Date	[11/2/2013]	SLA Serial Number	
Number of Locations		Upsell Opportunity	--None--
Active	Yes		

Description Information

Description

Save Save & New Cancel

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.

Home Chatter Campaigns Leads Accounts **Contracts** Opportunities Forecasts Contacts Cases Solutions Products Reports Dashboards +

Create New... Contract Edit **New Contract**

Recent Items

Bisp Trainings

Contract Edit **Save** Save & New Cancel

Step 1 :-

Contract Edit Help for this Page ?

New Contract

Contract Edit **Save** Save & New Cancel

Contract Information ! = Required Information

Contract Owner	yogesh sharma	Status	<input type="text" value="Draft"/>
Account Name	<input type="text" value="bisp"/>	Contract Start Date	<input type="text" value="11/5/2013"/> [11/5/2013]
Customer Signed By	<input type="text" value="ricky jonne"/>	Contract Term (months)	<input type="text" value="2"/>
Customer Signed Title	<input type="text" value="ricky"/>	Owner Expiration Notice	<input type="text" value="15 Days"/>
Customer Signed Date	<input type="text" value="11/5/2013"/> [11/5/2013]	Company Signed By	<input type="text" value="Vikram yadav"/>
		Company Signed Date	<input type="text" value="11/5/2013"/> [11/5/2013]

Address Information

Billing Street	<input type="text" value="E-8"/>
Billing City	<input type="text" value="London"/>
Billing State/Province	<input type="text" value="London"/>
Billing Zip/Postal Code	<input type="text" value="564578"/>
Billing Country	<input type="text" value="Englend"/>

Description Information

Special Terms

Description

Save Save & New Cancel

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.

The screenshot shows the Salesforce.com navigation bar with the 'Opportunities' tab highlighted in yellow and a red box around it. Below the navigation bar, the 'Opportunities Home' page is visible. A 'Create New...' dropdown menu is on the left. In the main content area, there is a 'View: Closing This Month' dropdown and a 'Go!' button. Below this, there is a 'Recent Opportunities' section with a 'New' button highlighted in a red box and a red arrow pointing to it. The 'Recent Opportunities' table has columns for 'Opportunity Name', 'Account Name', and 'Close Date'. One row is visible with 'bisp-xvz' as the opportunity name, 'bisp' as the account name, and '12/31/2013' as the close date.

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.

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

Leads Accounts Contracts **Opportunities** Forecasts Contacts Cases Solutions Products Reports Dashboards +

Opportunity Edit Help for this Page ?

New Opportunity

Opportunity Edit

Opportunity Information ! = Required Information

Opportunity Owner	yogesh sharma	Amount	<input type="text" value="350000"/>
Private	<input type="checkbox"/>	Close Date	<input type="text" value="11/30/2013"/> [<input type="text" value="11/6/2013"/>
Opportunity Name	<input type="text" value="Cell Phone"/>	Next Step	<input type="text"/>
Account Name	<input type="text" value="jason doe"/>	Stage	<input type="text" value="Prospecting"/>
Type	<input type="text" value="New Customer"/>	Probability (%)	<input type="text" value="10"/>
Lead Source	<input type="text" value="Web"/>	Primary Campaign Source	<input type="text" value="Nov Campaigns"/>

Additional Information

Order Number	<input type="text"/>	Main Competitor(s)	<input type="text"/>
Current Generator(s)	<input type="text"/>	Delivery/Installation Status	<input type="text" value="--None--"/>
Tracking Number	<input type="text"/>		

Description Information

Description

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

Home Chatter Campaigns Leads Accounts Contracts Opportunities **Forecasts** Contacts Cases Solutions Products Reports Dashboards All Details +

Create New...

Introducing Forecasts

Predict and plan your sales cycle from pipeline to closed sales, and manage sales expectations throughout your organization.

As a user, you'll enjoy these features and benefits.

- Interactive, expandable tables that let you select and view your own forecasts and those of your subordinates.
- Forecast summary information for single months and a multi-month range, for all forecast categories.
- Sortable list of related opportunities that updates dynamically according to your table selection.
- Easy adjustments and access to related detail including who made adjustments and original forecast amounts.

To access Forecasts, contact your Salesforce.com administrator.

Recent Items

- coloeqe info
- voqesh sharma
- Cell phone's
- bisp
- Bisp Trainings
- Vikram vadav
- bisp-xyz
- 00000101
- ricky ionne

Recycle Bin

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.

Home Chatter Campaigns Leads Accounts Contracts Opportunities Forecasts **Contacts** Cases Solutions Products Reports Dashboards All Details +

Create New... Contacts Home Tell me mo

View: New Last Week Go! Edit | Create New View

Recent Items

- Jhon deo
- coloeqe info
- yogesh sharma

Recent Contacts **New**

Contact Edit **New Contact** Help for this Page

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

Contact Edit Save Save & New Cancel

Contact Information = Required Information

Contact Owner	yogesh sharma	Phone	45875445
First Name	Mr. Jhon	Home Phone	12548544
Last Name	deo	Mobile	+12545874578
Account Name	Bisp Trainings	Other Phone	
Title	Cell phone des	Fax	
Department	Sales	Email	jhon@bisp.com
Birthdate	10/10/1985	Assistant	harry
Reports To	ricky jonne	Asst. Phone	4147582
Lead Source	Web		

Address Information Copy Mailing Address to Other Address

Mailing Street	London	Other Street	London
Mailing City	London	Other City	London
Mailing State/Province		Other State/Province	
Mailing Zip/Postal Code	565487	Other Zip/Postal Code	565487
Mailing Country	Englend	Other Country	Englend

Additional Information

Languages	English	Level	Primary
-----------	---------	-------	---------

Description Information

Description

Save Save & New Cancel

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 :


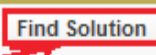
The screenshot shows the top navigation bar of a CRM system with tabs for Home, Chatter, Campaigns, Leads, Accounts, Contracts, Opportunities, Forecasts, Contacts, Cases, Solutions, Products, Reports, Dashboards, and All Details. The 'Cases' tab is highlighted with a red box and a red arrow. Below the navigation bar, the 'Cases Home' page is visible, featuring a 'Create New...' button, a 'Recent Items' list, and a 'View:' dropdown set to 'All Closed Cases'. A 'New' button in the 'Recent Cases' section is also highlighted with a red box and a red arrow.

Step 1 :-

The screenshot displays the 'New Case' form. At the top, there are buttons for 'Save', 'Save & Close', 'Save & New', 'Check Spelling', and 'Cancel'. The form is divided into several sections: 'Case Information' with fields for Case Owner (yogesh sharma), Contact Name (Jhon deo), Account Name (Bisp Trainings), Type (Electrical), Case Reason (Installation), Status (New), Priority (High), and Case Origin (Web); 'Additional Information' with Product (--None--), Potential Liability (--None--), Engineering Req Number, and SLA Violation (--None--); 'Description Information' with Subject, Description, and Internal Comments text areas; and 'Optional' with checkboxes for 'Assign using active assignment rules' and 'Send notification email to contact'. The 'Save' button at the bottom is highlighted with a red box.

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

 **Solutions**

 or

Solutions Help ?

No Solutions Attached

Click on View Suggested Solution button or you can find

Step 2 :-

Click on **Select** link



Find Solution for Case 00001026

Help for this Page ?

Case Owner	yogesh sharma	Contact Name	Jhon deo
Status	New	Email	jhon@bispc.com
Case Number	00001026	Phone	45875445
Subject			

Enter keywords to find matching solutions.

Relevant Reviewed Solutions [1] Customize...

Action	Solution Title	Score	Status	Author Alias	Num Related Cases	Last Modified Date
Select	GenWatt Installation Services GenWatt Corporation has a full-service support organization offering customers every type of installation assistance -- from complete start-to-finish,...	100%	Reviewed	yshar	0	8/30/2013 3:17 PM

Relevant Unreviewed Solutions [1] Customize...

Action	Solution Title	Score	Status	Author Alias	Num Related Cases	Last Modified Date
Select	Electrical wiring installation for GC5060 The red wiring from the top electronic panel of the GC5060 and the yellow wiring on the main generator assembly have to be connected together....	34%	Draft	yshar	0	8/30/2013 3:17 PM

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.



Tell me more! | Help for this Page ?

Enter keywords to find matching solutions.

Enter here key word for searching solution then click on Find Solution button.

Solution Views

View: [Edit | Create New View](#)

Click here for see All Reviewed Solutions.

Recent Solutions

Recently Viewed ▾

No recent records. Click Go or select a view from the dropdown to display records.

Reports

- [Solution List](#)
- [Solution History Report](#)

[Go to Reports »](#)

Tools

[Mass Delete Solutions](#)

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.