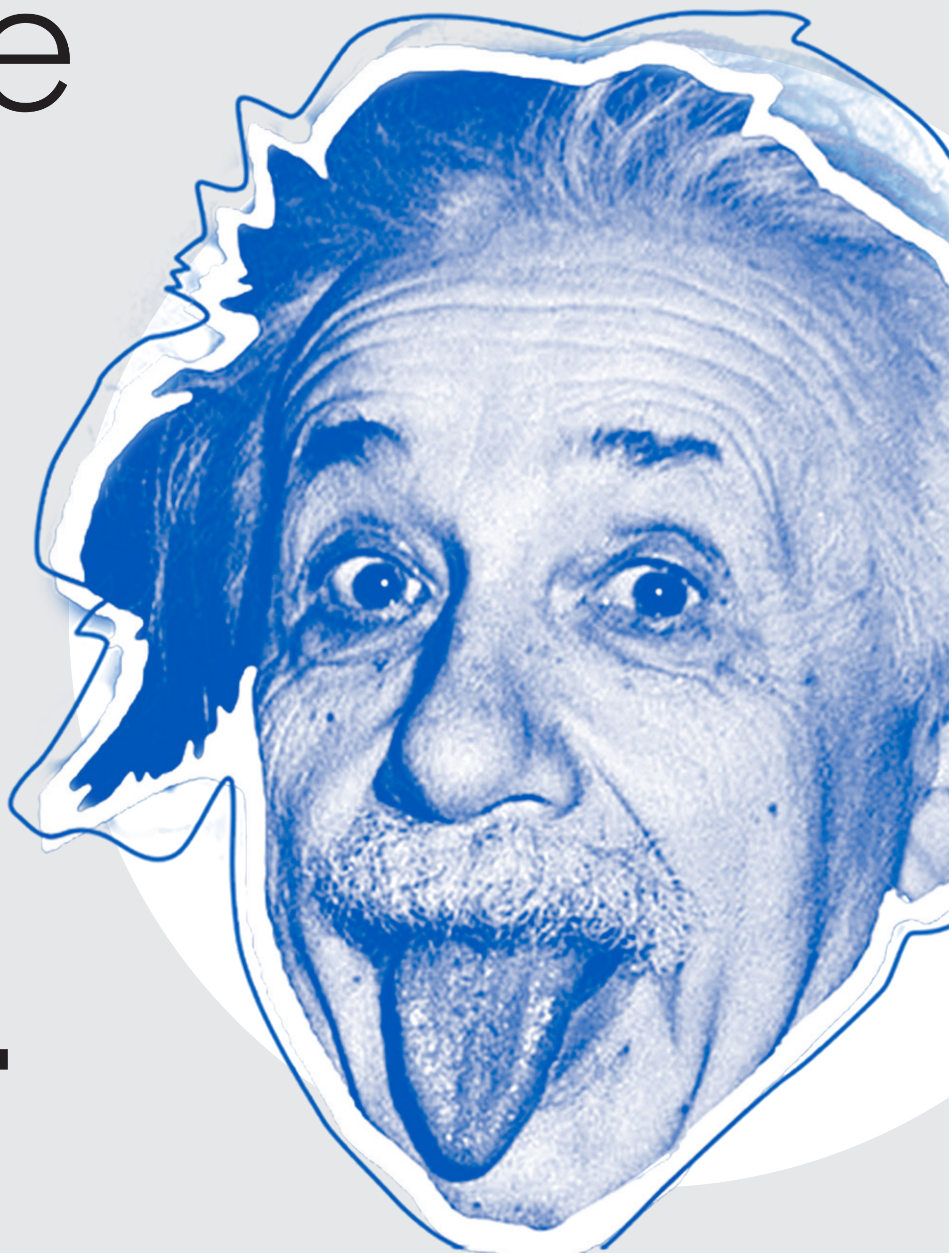
Salesforce

Quick Reference Guide



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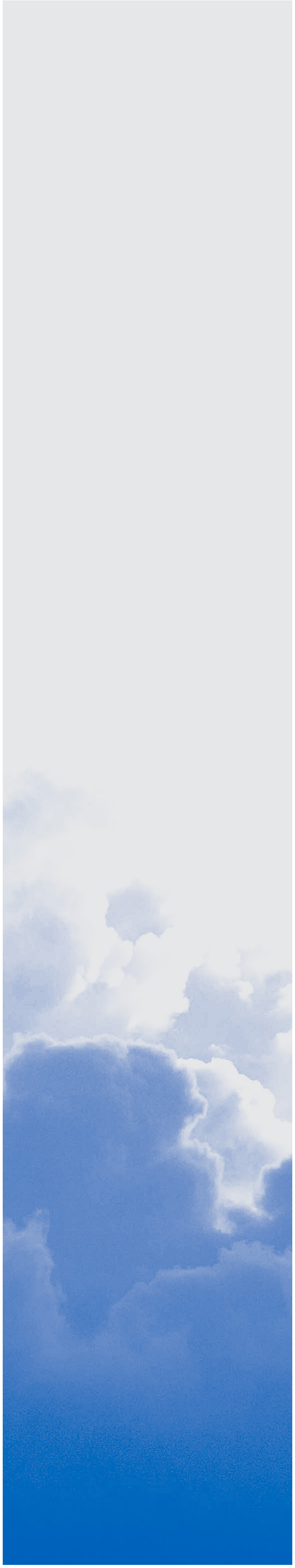


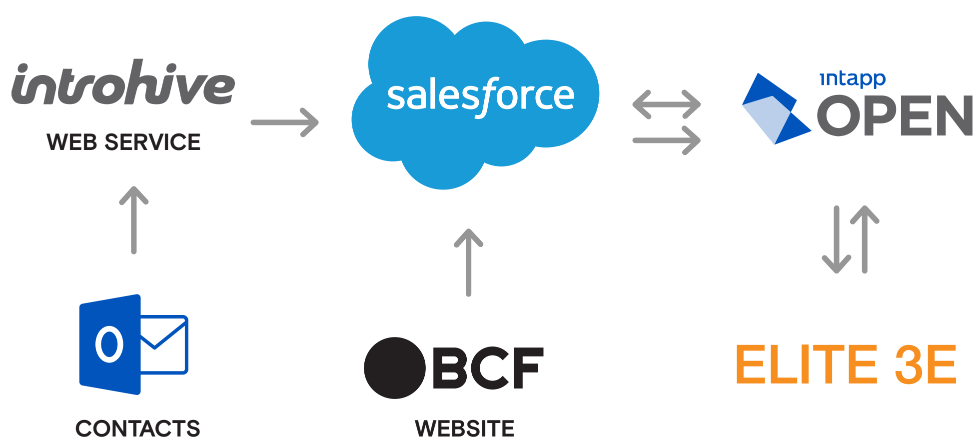
FAQ

What best practices should I use?

1. Identify all of your personal contacts in Outlook;
2. When adding a new contact in Outlook, provide as much information as possible;
3. Always update your contact's record in Outlook when you get new information;
4. Always open your clients' files and matters in Salesforce.

What is Salesforce?

It's an integrated system: a bridge between different applications.



Why Salesforce?

FOSTERS SYNERGIES BY PROVIDING A COLLABORATIVE PLATFORM:

1. Information is shared between professionals/teamwork: business leads, relationships;
2. Gives clients a gateway to share and access content (in progress).

› Provides financial reports related to business targets using a dashboard.

PROVIDES A PORTRAIT OF CURRENT AND POTENTIAL CLIENTS:

1. Billed services by category of expertise
2. Industry
3. Interaction records

› Helps track and monitor business opportunity.

What is an opportunity?

› An opportunity is a business development initiative; a potential file for an actual or potential client.

› The opportinuty comes about through the opening of a new client/file.

Checklist

Records

SEARCH FOR A RECORD:

1. In the global search bar at the top of your screen, type what you are looking for;
2. Hit Enter to start the search;
3. Review the search results and choose the relevant information.

VIEW A RECORD:

1. From the top horizontal menu, choose the desired item (accounts, contacts, etc.);
2. View all available records for each item.

View a list

DISPLAY A LIST VIEW:

When viewing an item's records, by default you will see the most recently viewed records.

1. To switch views, click the arrow next to the view name;
2. Select the one that suits your needs.

CHANGE YOUR DEFAULT LIST VIEW:

1. Select the view that suits your needs;
2. Click on the pin symbol. Your default view is now set.

Lead, Contact and Account

CREATE A CONTACT OR A LEAD:

1. Create the contact or the lead in your Outlook contact list;
2. This will automatically create the contact or lead in Salesforce.

CREATE OF MODIFY AN ACCOUNT:

Accounts (existing clients) in Salesforce are synced with Elite 3E. You do not need to create new ones in Salesforce. Changes are also made automatically.

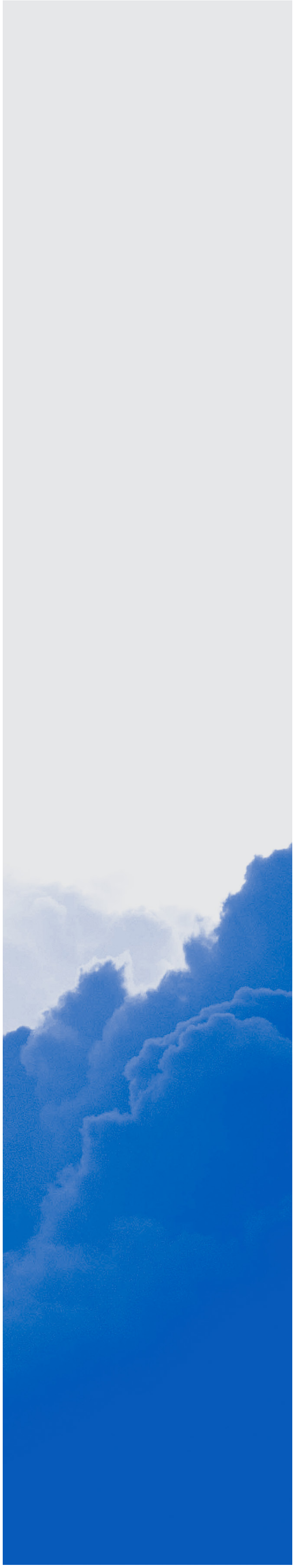
Relationship and Activity

VIEW RELATIONSHIP STRENGHT:

1. Open the contact or lead record;
2. Select the Associate tab;
3. Under Relationships, you will see which professionals know the contact or lead and the strength of the relationship.

CREATE A NEW ACTIVITY:

1. Choose an account, a contact, a lead or an opportunity;
2. Under the Details tab on the right, select the type of activity you wish to record;
3. Fill in the blanks and click Save.



Definitions

ACTIVITY	Allows you to create a reminder for an upcoming task, a note about a completed task that you want to record, or a reminder about an event.
FIELD	Data in the record, for example a contact's first and last name.
ACCOUNT	BCF's existing client.
CONTACT	Person associated with an account (existing client).
RECORD	Data found in an item, such as a contact.
OBJECT	Grouping of similar data, for example all contacts.
OPPORTUNITY	A potential file for an actual or potential client.
LEAD	A person working for a potential client.
PREFERED PRONOUN	Lets each professional determine for a contact or a lead, which preferred pronoun to use between "tu" and "vous" (in French).
GLOBAL SEARCH	Allows you to search through all existing data.
RELATIONS	Provides information on who at BCF knows the contact or lead.

DASHBOARD	Display of valuable and useful data.
TRAILHEAD	Salesforce learning path.
LIST VIEW	Filter to display data based on criteria, such as recently viewed contacts.

Notes

Resources

ON THE WEB:

- Go to this page on our website: **www.bcf.ca/salesforce**

Support

Logging into Salesforce, technical issues, training needs, etc.

CALL THE CENTRE D'ASSISTANCE TECHNOLOGIQUE (CAT):

- Office: **ext. 4444**
- Outside the office: **514 798-4444**