

# Contents at a Glance

---

<b><i>Introduction</i></b> .....	<b>1</b>
<b><i>Part I: Salesforce Basics</i></b> .....	<b>7</b>
Chapter 1: Looking Over Salesforce.....	9
Chapter 2: Navigating Salesforce.....	17
Chapter 3: Personalizing Your System.....	37
<b><i>Part II: Driving Sales – The Basics</i></b> .....	<b>53</b>
Chapter 4: Prospecting Leads.....	55
Chapter 5: Managing Accounts.....	79
Chapter 6: Developing Contacts.....	99
Chapter 7: Managing Activities.....	117
Chapter 8: Sending E-Mail .....	135
Chapter 9: Tracking Opportunities .....	149
<b><i>Part III: Driving Sales – The Next Level</i></b> .....	<b>165</b>
Chapter 10: Tracking Products and Price Books.....	167
Chapter 11: Calculating Forecasts.....	185
Chapter 12: Managing Your Partners .....	201
<b><i>Part IV: Optimizing Marketing</i></b> .....	<b>215</b>
Chapter 13: Driving Demand with Campaigns.....	217
Chapter 14: Driving Sales Effectiveness with Documents.....	235
<b><i>Part V: Delivering Excellent Service</i></b> .....	<b>247</b>
Chapter 15: Understanding Salesforce Service & Support.....	249
Chapter 16: Preparing Salesforce Service & Support .....	263
<b><i>Part VI: Measuring the Overall Business Performance</i></b> .....	<b>281</b>
Chapter 17: Analyzing Data with Reports .....	283
Chapter 18: Seeing the Big Picture with Dashboards .....	301
Chapter 19: Fine-Tuning the Configuration.....	315

<b><i>Part VII: Designing the Salesforce Solution</i></b> .....	<b>333</b>
Chapter 20: Customizing Salesforce.....	335
Chapter 21: Extending Salesforce Beyond CRM .....	357
Chapter 22: Migrating and Maintaining Your Data .....	375
<b><i>Part VIII: The Part of Tens</i></b> .....	<b>387</b>
Chapter 23: Ten Ways to Drive More Productivity.....	389
Chapter 24: Ten Keys to a Successful Implementation.....	393
Bonus Chapter: Improving Communication with Standard Template .....	<a href="http://www.dummies.com/go/salesforce">www.dummies.com/go/salesforce</a>
<b><i>Index</i></b> .....	<b>399</b>

# Table of Contents

---

<b><i>Introduction</i></b> .....	<b>1</b>
Updates to the Second Edition.....	2
How to Use This Book .....	3
Foolish Assumptions .....	4
Icons Used in This Book.....	4
<b><i>Part 1: Salesforce Basics</i></b> .....	<b>7</b>
<b>Chapter 1: Looking Over Salesforce</b> .....	<b>9</b>
Using Salesforce to Solve Critical Business Challenges .....	10
Understanding your customer.....	10
Centralizing contacts under one roof .....	10
Expanding the funnel .....	11
Consolidating your pipeline.....	11
Working as a team .....	11
Collaborating with your partners.....	11
Beating the competition .....	12
Improving customer service .....	12
Accessing anytime, anywhere .....	12
Measuring the business .....	12
Extending the Value Chain .....	13
Synchronizing with Outlook .....	13
Integrating with your Web site .....	13
Connecting to other Web sites .....	13
Integrating with other applications .....	14
Managing other business processes.....	14
Deciding Which Edition Is Best for You.....	14
<b>Chapter 2: Navigating Salesforce</b> .....	<b>17</b>
Getting Familiar with Basic Terms .....	17
Accessing Salesforce.....	18
Setting up a password.....	19
Logging in .....	19
Navigating the Home Page .....	20
Managing your calendar .....	20
Tracking your tasks.....	21
Using dashboard snapshots from the home page.....	22
Accessing information with the sidebar.....	23



- Navigating the Apps.....25
  - Discovering the AppExchange app menu .....26
  - Finding out about the tabs .....26
  - Discovering a tab home page.....28
- Using the Create New Drop-down List.....32
  - Creating records .....32
  - Resurrecting from the Recycle Bin.....33
- Detailing the Record .....33
  - Using links and buttons on the detail page.....35
  - Using custom links .....35
  - Capitalizing on related lists.....36
- Getting Help and Setting Up.....36

**Chapter 3: Personalizing Your System ..... 37**

- Using the Personal Setup Menu .....37
- Modifying Your Personal Information .....39
  - Updating your user information.....39
  - Creating personal groups .....40
  - Sharing your calendar.....40
- Changing Your Display .....41
  - Modifying your tabs .....42
  - Customizing pages .....43
  - Granting login access.....43
- Optimizing Your E-Mail.....44
- Working with Salesforce Remotely .....45
  - Synchronizing with Outlook.....45
  - Synchronizing with Lotus Notes.....47
  - Working Offline .....48
  - Going wireless with AppExchange Mobile .....50
- Importing Your Contacts.....51

***Part II: Driving Sales – The Basics.....53***

**Chapter 4: Prospecting Leads ..... 55**

- Introducing the Lead Record .....55
- Setting Up Your Leads .....57
  - Adding new leads .....57
  - Cloning an existing lead.....58
  - Importing your leads.....59
  - Sharing your leads.....62
- Organizing Your Leads.....63
  - Using lead views .....63
  - Creating custom lead views .....64
  - Accepting leads from a queue .....65
- Following Up on Leads .....67
  - Finding and merging duplicate lead records .....67
  - Tracking leads with related lists .....68

Updating lead fields .....70  
 Converting qualified leads .....71  
 Maintaining Your Lead Database .....73  
     Making use of lead queues .....73  
     Creating assignment rules for automatic routing .....74  
     Transferring leads .....75  
     Changing the status of multiple records .....76  
     Mass deleting lead records .....77

**Chapter 5: Managing Accounts .....79**

Getting Familiar with the Account Record.....80  
     Understanding standard fields .....80  
     Customizing account fields .....81  
 Creating and Updating Your Accounts .....82  
     Adding new accounts.....82  
     Updating account fields.....84  
     Sharing accounts with others .....84  
 Organizing Your Accounts .....86  
     Using account views .....86  
     Creating custom account views .....87  
     Making use of the Recent Accounts section .....88  
     Reassigning account ownership.....88  
     Building parent/child relationships .....90  
 Performing Actions with Account Related Lists .....92  
     Defining contact roles.....92  
     Establishing account teams .....93  
     Displaying an account’s opportunities .....94  
     Viewing cases.....95  
 Maintaining Your Account Database .....95  
     Merging duplicate records .....95  
     Deleting account records .....96

**Chapter 6: Developing Contacts .....99**

Understanding the Contact Record .....100  
 Customizing Contact Information .....100  
 Entering and Updating Your Contacts .....101  
     Entering new contacts .....101  
     Importing your contacts and accounts .....103  
     Updating contact fields.....107  
     Cloning an existing contact .....108  
 Organizing Your Contacts .....108  
     Using contact views .....108  
     Creating custom contact views .....110  
 Using the Recent Contacts Section.....111  
     Reassigning contact ownership.....111  
     Developing organizational charts .....112  
 Performing Actions with Contact Related Lists .....113  
 Merging Duplicate Records.....115

<b>Chapter 7: Managing Activities</b> .....	<b>117</b>
Looking Over Activities .....	118
Creating Activities .....	118
Creating an event .....	119
Creating a task .....	121
Logging a call .....	123
Organizing and Viewing Activities .....	124
Viewing activities from a record's related lists .....	125
Looking at your home page planner .....	125
Viewing group calendars with Multi User View .....	127
Looking at other users' calendars from the home page .....	128
Sharing your calendar .....	129
Updating Activities .....	130
Assigning activities .....	131
Completing a task .....	131
Synchronizing with Microsoft Outlook .....	132
Synchronizing with Lotus Notes .....	133
<b>Chapter 8: Sending E-Mail</b> .....	<b>135</b>
Understanding E-Mail Fields in Salesforce .....	136
Setting Up Your E-Mail .....	136
Personalizing your e-mail settings .....	136
Building personal e-mail templates .....	137
Sending E-Mail from Salesforce .....	139
Creating and sending e-mail .....	139
Using e-mail templates .....	141
Attaching files to e-mails .....	142
Sending Mass E-Mail .....	142
Tracking E-Mail .....	144
Viewing e-mails in Activity History .....	144
Tracking HTML e-mails .....	144
Integrating with Outlook E-Mail and Lotus Notes .....	145
Moving sent or received Outlook e-mail .....	146
Sending outbound e-mail from Outlook .....	147
Synchronizing with Lotus Notes .....	148
<b>Chapter 9: Tracking Opportunities</b> .....	<b>149</b>
Getting Familiar with the Opportunity Record .....	150
Entering Opportunities .....	151
Adding new opportunities .....	151
Cloning an opportunity .....	153
Modifying Opportunity Records .....	153
Updating opportunity fields .....	154
Sharing opportunities with others .....	154
Reassigning opportunity ownership .....	155

Organizing Your Opportunities .....156  
     Using opportunity views .....157  
     Creating custom opportunity views .....158  
 Performing Actions with Opportunity Related Lists .....159  
     Defining contact roles .....160  
     Establishing sales teams .....161  
     Tracking competitors.....162

***Part III: Driving Sales – The Next Level..... 165***

**Chapter 10: Tracking Products and Price Books .....167**

Discovering Products and Price Books .....168  
     Defining standard product fields.....168  
     Understanding the different types of pricing .....169  
 Using Products and Price Books .....169  
     Adding products to opportunities .....170  
     Updating product details for an opportunity .....171  
     Adding and updating schedules on opportunities.....172  
     Searching for products .....173  
     Creating custom views for products and price lists .....174  
 Building the Product Catalog.....174  
     Planning products for success .....174  
     Adding products to the product catalog.....175  
     Changing product details in the product catalog.....175  
 Setting Up Schedules .....176  
     Enabling schedules for your company .....176  
     Adding and updating a default schedule.....177  
 Managing Price Books .....178  
     Adding to the standard price book .....179  
     Creating a custom price book.....180  
     Adding products to a custom price book .....180  
     Making global changes to price books .....181

**Chapter 11: Calculating Forecasts .....185**

Getting Familiar with Forecasts.....185  
 Updating Forecasts .....187  
     Viewing your forecasts .....187  
     Editing forecasts and applying overrides .....188  
     Submitting your forecast.....192  
 Setting up Customizable Forecasts.....193  
     Updating standard fiscal year settings .....193  
     Modifying the forecast settings .....194  
     Adjusting the forecast role hierarchy.....196  
     Activating Customizable Forecasts .....197  
     Assigning Quotas to Forecasts .....198

<b>Chapter 12: Managing Your Partners</b> . . . . .	<b>201</b>
Understanding the Partner Lifecycle.....	202
Understanding a day in the life of a channel manager .....	202
Understanding a day in the life of a partner .....	203
Managing Partners with Salesforce PRM .....	204
Creating partner accounts and contacts.....	204
Assigning leads to partners .....	205
Recruiting partners .....	205
Accessing Salesforce PRM as a Partner .....	206
Understanding your PRM Portal home page .....	206
Viewing and updating your leads .....	209
Managing your opportunities .....	210
Setting Up Salesforce PRM for your Channel Team .....	211
Granting partners access to Salesforce PRM.....	211
Customizing the PRM Portal .....	212
<b>Part IV: Optimizing Marketing</b> .....	<b>215</b>
<b>Chapter 13: Driving Demand with Campaigns</b> . . . . .	<b>217</b>
Understanding Campaigns.....	217
Creating a new campaign .....	219
Modifying the member status.....	220
Building Target Lists .....	221
Using rented lists .....	221
Importing new campaign members .....	221
Targeting existing members with the Integrated Campaign Builder.....	223
Executing Campaigns.....	226
Delivering an online campaign .....	226
Executing an offline campaign .....	227
Tracking Responses .....	227
Capturing leads from Web forms.....	227
Generating HTML .....	228
Viewing and testing the form.....	229
Manually updating member statuses.....	230
Mass updating campaign statuses .....	231
<b>Chapter 14: Driving Sales Effectiveness with Documents</b> . . . . .	<b>235</b>
Understanding the Document Library .....	236
Organizing Your Documents .....	236
Building folders .....	236
Viewing document lists.....	237

Adding Documents.....	238
Uploading a document.....	239
Linking to an external file.....	240
Using Documents .....	241
Searching for documents.....	242
Searching through folders.....	243
Sending documents by e-mail.....	243
Maintaining the Document Library.....	244
Editing document records.....	244
Updating documents.....	245
Deleting documents .....	246

## ***Part V: Delivering Excellent Service* .....247**

### **Chapter 15: Understanding Salesforce Service & Support .....249**

Walking through a Day in the Life of a Sales Rep .....	250
Understanding the Case Record.....	250
Creating a Case.....	252
Validating the contact.....	252
Entering new cases.....	253
Managing Cases .....	254
Updating case fields .....	254
Reassigning case ownership .....	255
Getting a clue on views and queues.....	255
Creating custom case views.....	257
Researching and Resolving Cases .....	257
Understanding solutions .....	258
Finding solutions .....	258
Attaching solutions to a case.....	259
Communicating the Solution .....	260
Responding with standard email templates .....	260
Working with Email-to-Case .....	260
Closing a case .....	261

### **Chapter 16: Preparing Salesforce Service & Support .....263**

Preparing Your Salesforce Service & Support Strategy.....	264
Automating Case Management.....	264
Adding case queues .....	265
Using assignment rules for routing.....	265
Automating case escalation .....	266
Building the Knowledge Base .....	269
Defining the review process.....	269
Defining categories.....	270

Customizing solutions .....	271
Writing solutions .....	271
Reviewing solutions .....	271
Publishing your knowledge base.....	271
Capturing and Associating Cases Efficiently .....	272
Helping Customers Help Themselves.....	274
Launching a self-service portal .....	275
Managing self-service users .....	277
Improving Team Productivity.....	277
Using the agent console .....	277
Managing service entitlements.....	278
Verifying contracts .....	279
Tracking assets .....	280

## ***Part VI: Measuring the Overall Business Performance ...281***

### **Chapter 17: Analyzing Data with Reports .....283**

Discovering Reports .....	284
Navigating the Reports home page.....	284
Displaying a report.....	285
Developing Reports with the Wizard.....	286
Building a report from scratch .....	286
Customizing existing reports.....	289
Building custom summary formulas.....	290
Adding conditional highlighting.....	292
Filtering on a Report.....	294
Using the Org Drill Down feature.....	294
Using the Report Options section.....	295
Hiding and showing details.....	296
Filtering with the drill down menu.....	296
Clearing filters.....	297
Exporting Reports to Excel.....	298
Organizing Your Reports .....	299
Creating new folders .....	299
Reordering multiple folders .....	300
Maintaining your report library .....	300

### **Chapter 18: Seeing the Big Picture with Dashboards .....301**

Figuring Out Dashboards .....	301
Breaking down basic elements .....	302
Planning useful dashboards.....	303
Building Dashboards .....	304
Generating a sample dashboard.....	304
Cloning a dashboard .....	305
Developing a dashboard from scratch .....	306

Updating Dashboards .....	309
Editing dashboard properties .....	309
Editing a component .....	310
Modifying the layout .....	310
Refreshing the dashboard .....	310
Organizing Your Dashboards .....	311
Viewing dashboard lists .....	312
Building dashboard folders .....	312
<b>Chapter 19: Fine-Tuning the Configuration .....</b>	<b>315</b>
Figuring Out Configuration .....	316
Breaking down basic elements .....	316
Planning configuration to achieve success .....	317
Verifying Your Company Profile .....	317
Updating your company information .....	318
Defining fiscal years .....	318
Defining the Role Hierarchy .....	320
Defining Your Sharing Model .....	321
Setting organization-wide defaults .....	322
Creating groups .....	323
Granting greater access with sharing rules .....	324
Setting Up Profiles .....	325
Reviewing the standard profiles .....	325
Creating custom profiles .....	326
Adding Users to Salesforce .....	328
Using Other Security Controls .....	329
Setting field-level security .....	329
Delegating administration .....	330
 <b>Part VII: Designing the Salesforce Solution .....</b>	 <b>333</b>
<b>Chapter 20: Customizing Salesforce .....</b>	<b>335</b>
Discovering Customization .....	336
Breaking down basic elements .....	336
Customizing for relevance .....	337
Building and Editing Fields .....	337
Adding fields .....	338
Viewing and updating fields .....	339
Replicating your key standard processes .....	339
Understanding custom formula fields .....	340
Using Custom Buttons and Links .....	342
Customizing Page and Search Layouts .....	343
Modifying a page layout .....	344
Assigning layouts to profiles .....	345
Changing search layouts .....	346

Managing Multiple Business Processes .....	347
Managing Record Types .....	349
Creating Dependent Picklists.....	351
Managing Workflow & Approvals .....	352
Creating workflow rules.....	353
Assigning workflow tasks .....	354
Using workflow alerts .....	354

## **Chapter 21: Extending Salesforce Beyond CRM ..... 357**

Understanding the AppExchange Platform .....	357
Preparing Your AppExchange Strategy .....	359
Creating Custom Apps with AppExchange Builder .....	360
Setting Up the Custom App.....	360
Building Your Custom Objects.....	361
Modifying custom objects.....	362
Creating Custom Tabs.....	365
Sharing Apps on the AppExchange Directory .....	367
Trying out the AppExchange directory.....	368
Browsing the AppExchange directory .....	369
Installing AppExchange apps.....	371
Deploying AppExchange Apps for Your Organization.....	372
Testing your AppExchange apps .....	372
Running through typical scenarios .....	373
Deploying the solution.....	374

## **Chapter 22: Migrating and Maintaining Your Data ..... 375**

Understanding Your Options for Data Migration .....	376
Using import wizards .....	376
Investigating AppExchange Data Loader.....	376
Migrating Your Legacy Data.....	377
Determining your data sources .....	378
Preparing your data .....	378
Testing the import.....	379
Analyzing the test data results .....	379
Migrating your final data .....	380
Validating your data .....	380
Augmenting your data .....	381
Managing Your Salesforce Database.....	381
Backing up your data .....	381
Mass transferring records.....	382
Mass updating addresses .....	383
Mass deleting records.....	384
Getting Help with Complex Data Tasks .....	386

***Part VIII: The Part of Tens* .....387**

**Chapter 23: Ten Ways to Drive More Productivity .....389**

- Finding the Top Five Resources .....390
- Revisiting Five Great Productivity Tools.....391

**Chapter 24: Ten Keys to a Successful Implementation .....393**

- Identifying Your Executive Sponsor.....393
- Building Your Project Team .....394
- Evaluating Your Processes.....394
- Gathering Requirements .....394
- Defining Your Scope and Prioritizing Initiatives .....395
- Modeling Salesforce to Your Business .....395
- Customizing for User Relevance .....395
- Importing Clean Data.....396
- Building a Comprehensive Training Plan .....396
- Connecting with Peers.....396

**Bonus Chapter: Improving Communication  
with Standard Templates .....[www.dummies.com/go/salesforce](http://www.dummies.com/go/salesforce)**

- Understanding Standard Templates .....BC-1
- Planning Your E-Mail Templates.....BC-2
  - Understanding the possibilities.....BC-2
  - Setting up e-mail template folders .....BC-3
- Creating E-Mail Templates .....BC-4
  - Creating a text e-mail template.....BC-4
  - Generating merge fields for e-mail .....BC-5
  - Creating a standard HTML letterhead .....BC-6
  - Creating an HTML template with a letterhead.....BC-7
  - Creating a custom HTML template .....BC-8
- Setting Up Your Mail Merge Templates .....BC-9
  - Uploading your mail merge templates.....BC-10
- Running a Mail Merge .....BC-11

***Index*.....399**

