Getting Started Using Salesforce

Prepared for:

Prepared by:

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This document was developed for internal use of Michigan Works!

Navigating in Salesforce

Introduction

Salesforce is a cloud-based platform that helps manage business relationships. The MWA Salesforce has been customized for Business Services purposes specific to Michigan Works! agencies, and is not an “out-of-the box” product.

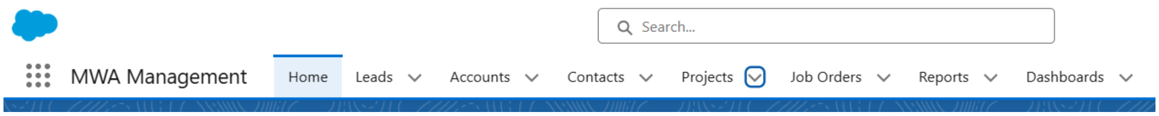
This Getting Started Training Manual is designed to give you an introduction and overview to key functionality and navigation within the system. This manual is general in nature; all users should follow their own organizational policies and procedures for data entry. Because Salesforce is widely used around the world, you may find training videos and manuals online but those will not be specific to the Salesforce you are using.

If you have questions about how to use the system, check in with your organization Salesforce Champion first. If there are issues, the Salesforce Champion will contact the MWA Salesforce Administrator for additional assistance.

Terminology

Here are some general terms that serve as the backbone Salesforce:

- **<u>Tab–</u>**navigational elements to access specific data and functions within Salesforce.



- **<u>Lead</u>**—a lead is someone (a contact or account) that you haven't done significant work for yet. For example, this might be just a business card you collected at a job fair or outreach event. Since the relationship hasn't been built yet, you could enter these as Leads then convert them later to full Accounts or Contacts. *Be sure to check with your Salesforce Champion at your organization to determine if Leads are being used*

- **<u>Accounts</u>**- are employers and partner organizations you work with. This is the PARENT record for everything in SF. All contacts, projects, and job orders must relate back to an Account.

- **<u>Contacts</u>**— are the individuals that you work with at each employer or partner organization, i.e. Human Resources Manager, CEO, Plant Manager, etc. You can have multiple contacts for each account.

- **<u>Activities–</u>** log emails, calls, or visits with Accounts here. You can also create a TASK and delegate action in the future to either yourself or another Salesforce user.

- **<u>Projects</u>**- is where all business service activities are captured. These services are broken into "record types" which dictate the information you need to enter into SF.
    - **<u>Training Services</u>**
    - **<u>Apprenticeship Program Outreach</u>**
    - **<u>Apprenticeships & Internships</u>**
    - **<u>Going Pro Apprenticeship</u>**
    - **<u>Going Pro Talent Fund</u>**
    - **<u>Hiring Services</u>**
    - **<u>Rapid Response</u>**

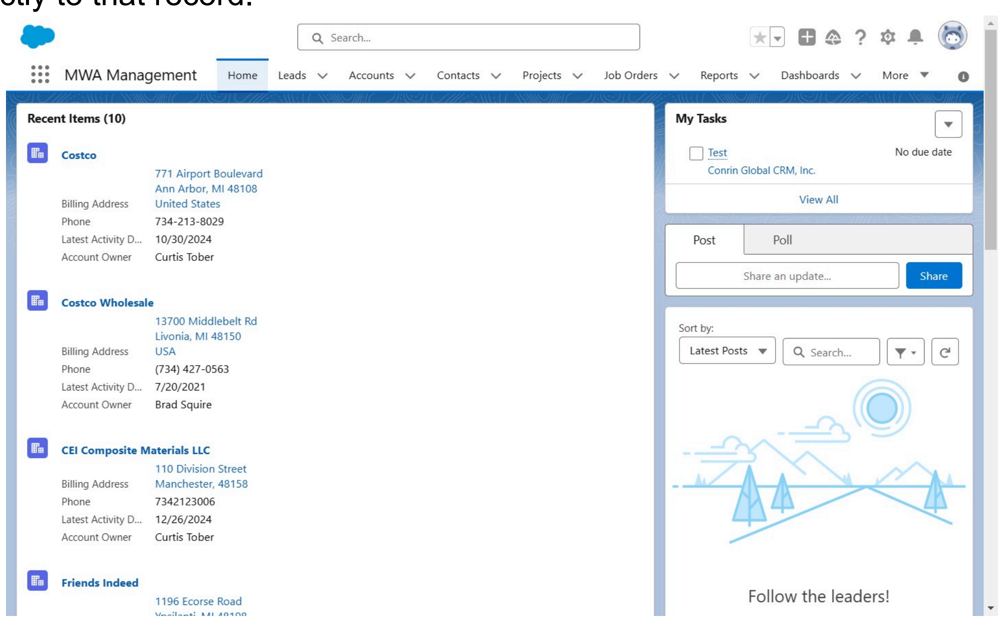
- ❖ **<u>Job Orders—</u>** use to capture job orders that you place for employers on the PMTC.
  - o The difference between a PROJECT and JOB ORDER is that the job order is just the service of a job order. If you want to track the services you provided to an employer to fill a specific job, you would want to use PROJECT. Using the JOB ORDER tab allows you to track what you are doing in PMTC here in SF and run reports
- ❖ **<u>Dashboards</u>**—These are quick views of charts and graphs that run off the reports that you have created. It can be a quick and easy way for your team to track goals and performance measurements.

Navigation

Upon logging into Salesforce, you will land on the Home tab.

This tab acts as a dashboard and will show you the 10 most recent items you have reviewed. On the right side of the window, you will also see "Today's Tasks". Tasks that were initiated either by you or someone else will show up on this list if they are due TODAY. THe arrow button in the top right of that window will allow you to change the filter for what Tasks you see. The options are: Today, My Tasks, All Overdue,Completed in the last 7 days, and Delegated Tasks._is Mission Control for your Salesforce.com (SF) instance.

Any text that is blue in Salesforce is a hyperlink, clicking on it will take you directly to that record.

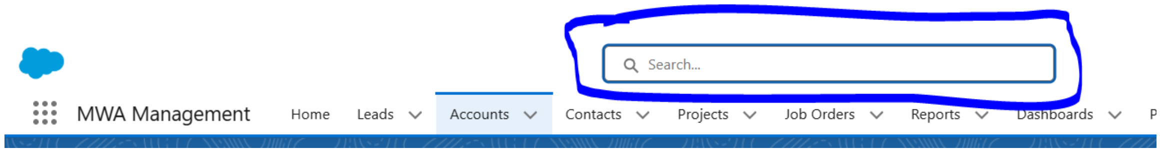


Clicking on a Tab in the Navigation Bar will take you to that tab's landing page. Here you will be able to view a list of recently viewed accounts or you can even create a customized list to find information more quickly. These lists are like one-dimensional reports without having to create a report. You will learn later in this manual how to create a list.

There are many ways to navigate through Salesforce to enter and edit data. In the next section, we will discuss general data entry.

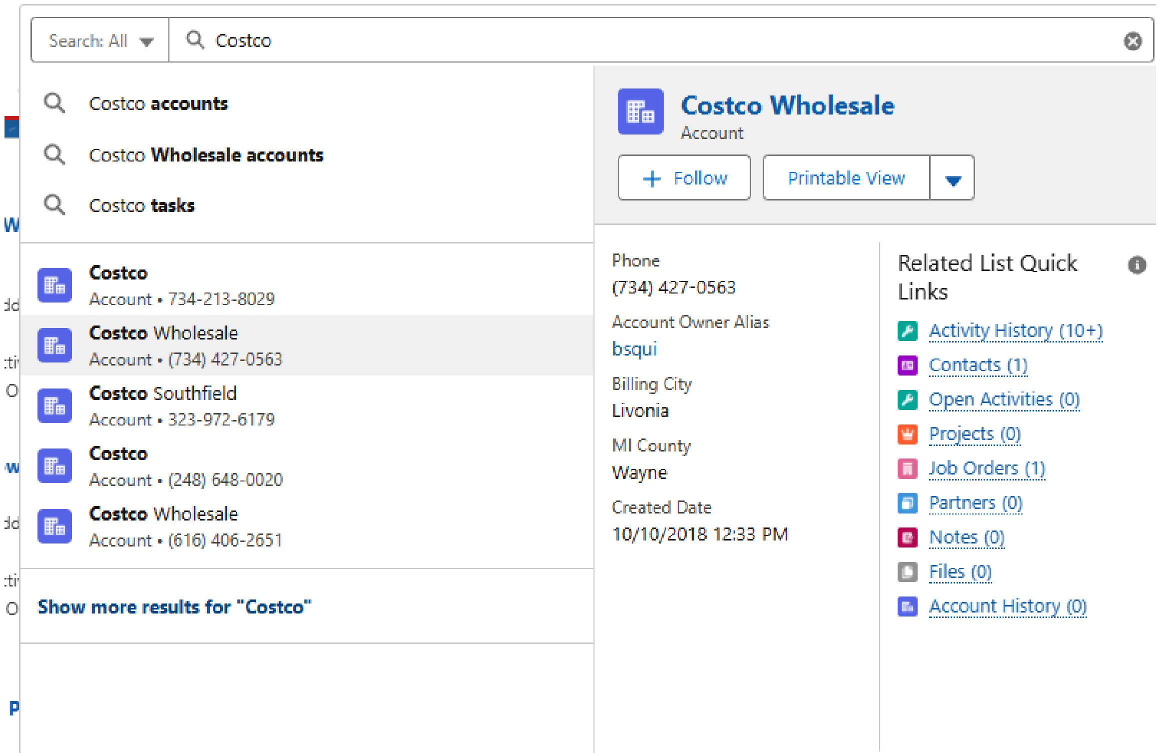
Best Practice–USE the Global Search Bar

Before creating new records in Salesforce,especially Accounts or Contacts, use the Global Search Bar to search for records.



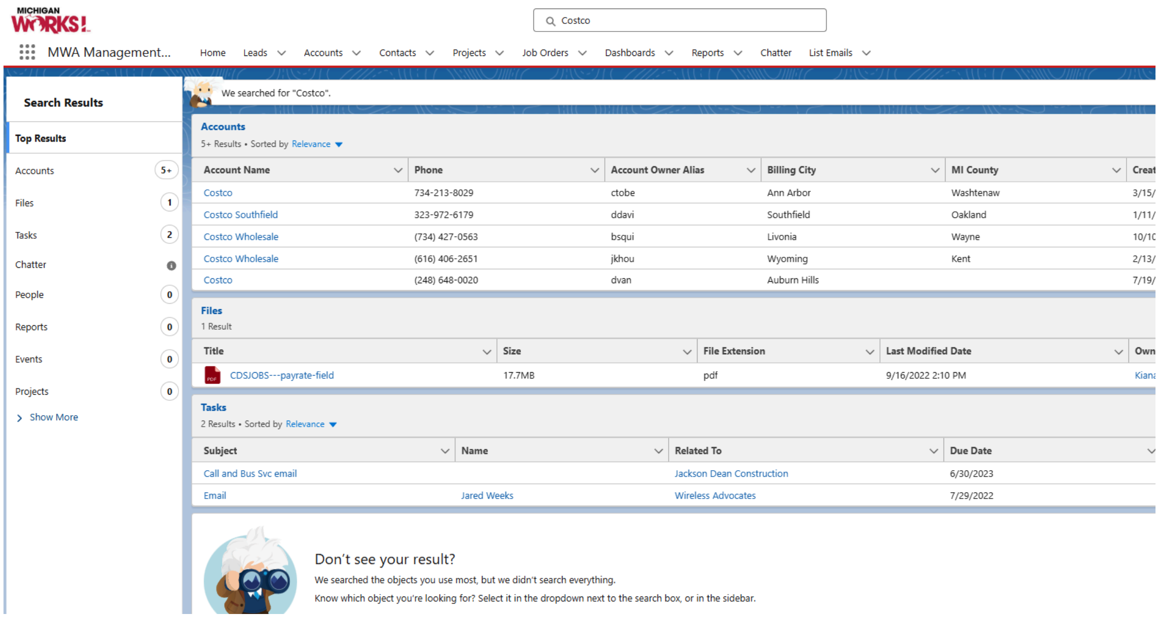
The Global Search Bar will show 5 possible results as you begin typing your search. This is an expedited search.

If there are records that match your search criteria, a list will pop up below the search bar.



Hovering over the search results will create a window to the right that will detail additional information about that record. This should help determine if the record is already created in Salesforce. Click on the Name of the record to go to the record's page. Or use the Related List Quick Links to quickly navigate to records related to the record.

If you click enter when using the Global Search Bar, you will be directed to a page of search results:



From this page, you can use the left hand navigation menu to find search results in any of the tabs of related information that include your search query. The main panel of the search results will return additional information for your search. Use any blue font to click into results.

USE THE GLOBAL SEARCH BAR–It is your friend!

There is also a matching rule within Salesforce that will flag if an Account appears to be a duplicate during the entering of the record. The matching rule for Accounts will look for similarities in these fields to flag duplicates:

`Account Name` AND `Billing Street`)

OR (`Account Name` AND `City` AND `State`)

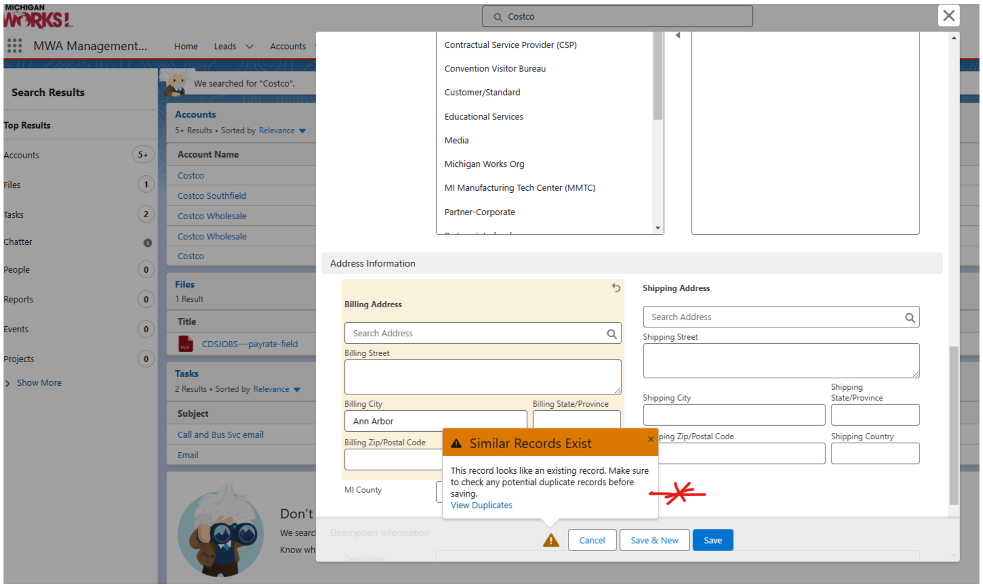
OR (`Account Name` AND `ZIP`)

OR (`Account Name` AND `Phone`)

OR (`Website` AND `Phone`)

OR (`Website` AND `Billing Street`)

If a duplicate is detected, a message will pop up by the save button.

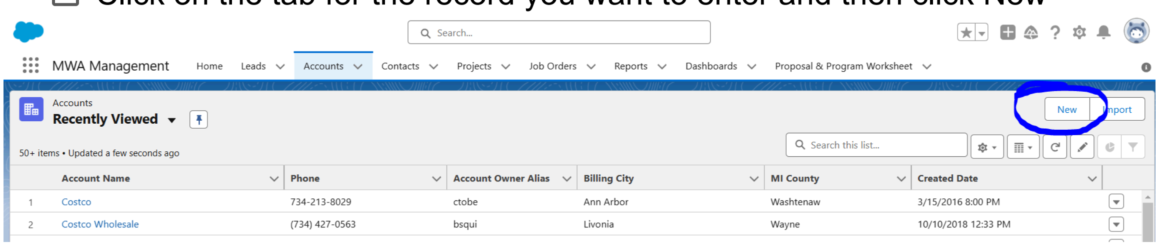


It is good practice to enter as much information about a record to avoid duplication.

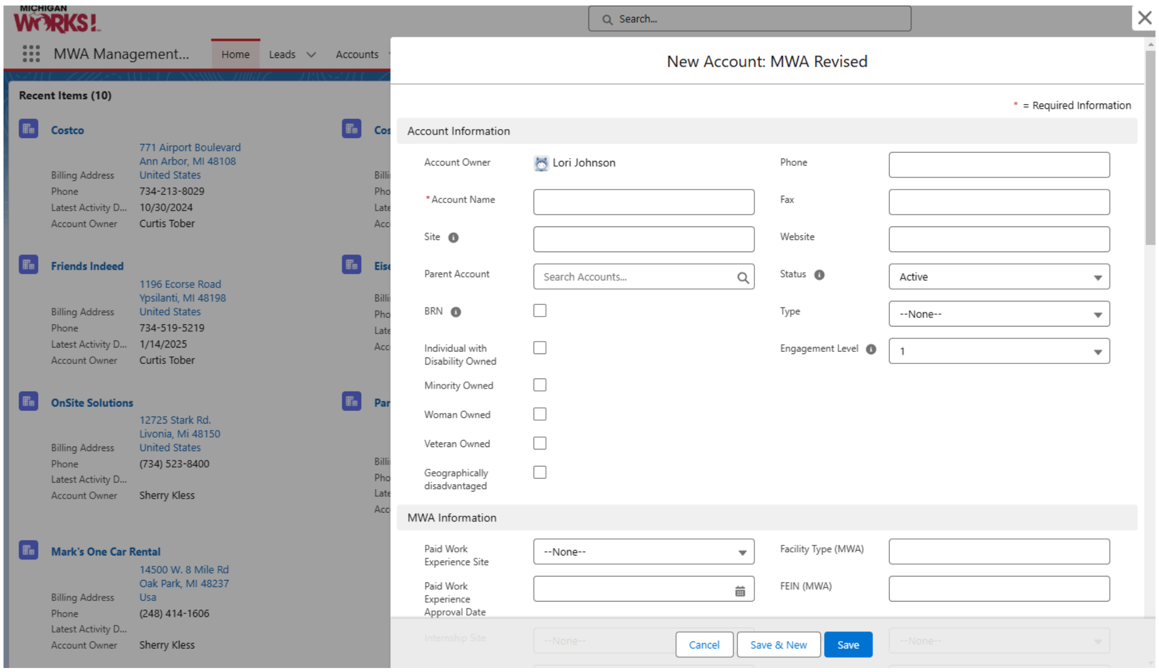
Data Entry Process-Creating new records

There are two ways to create a new record (Account, Leads, Contacts, Projects, Job Orders)

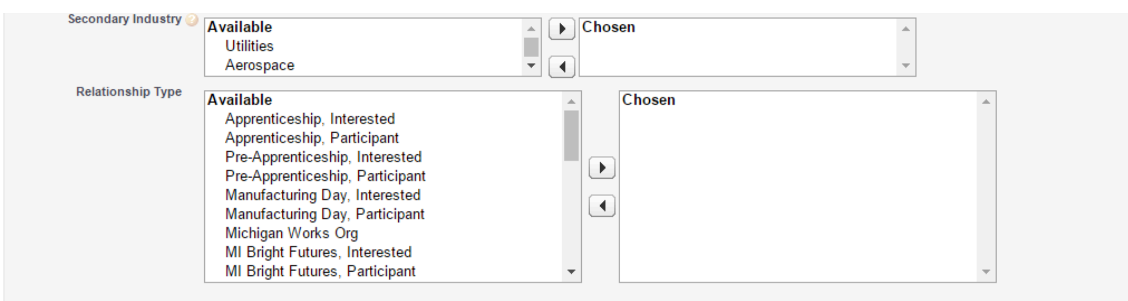
- ☐ Navigate to the tab in the Navigation menu –click on the arrow button.and click New Account or
- ☐ Click on the tab for the record you want to enter and then click New



Required fields have a red asterisk beside the name. Click SAVE at the bottom of the window.



Some fields are multi-picklist and you choose all that apply and move over to the "chosen" side….



Remember that the Account is the Parent record. So as you enter new information remember to enter it from the "top down". Enter the Account information first then enter contacts, and finally projects or job orders you are working on.

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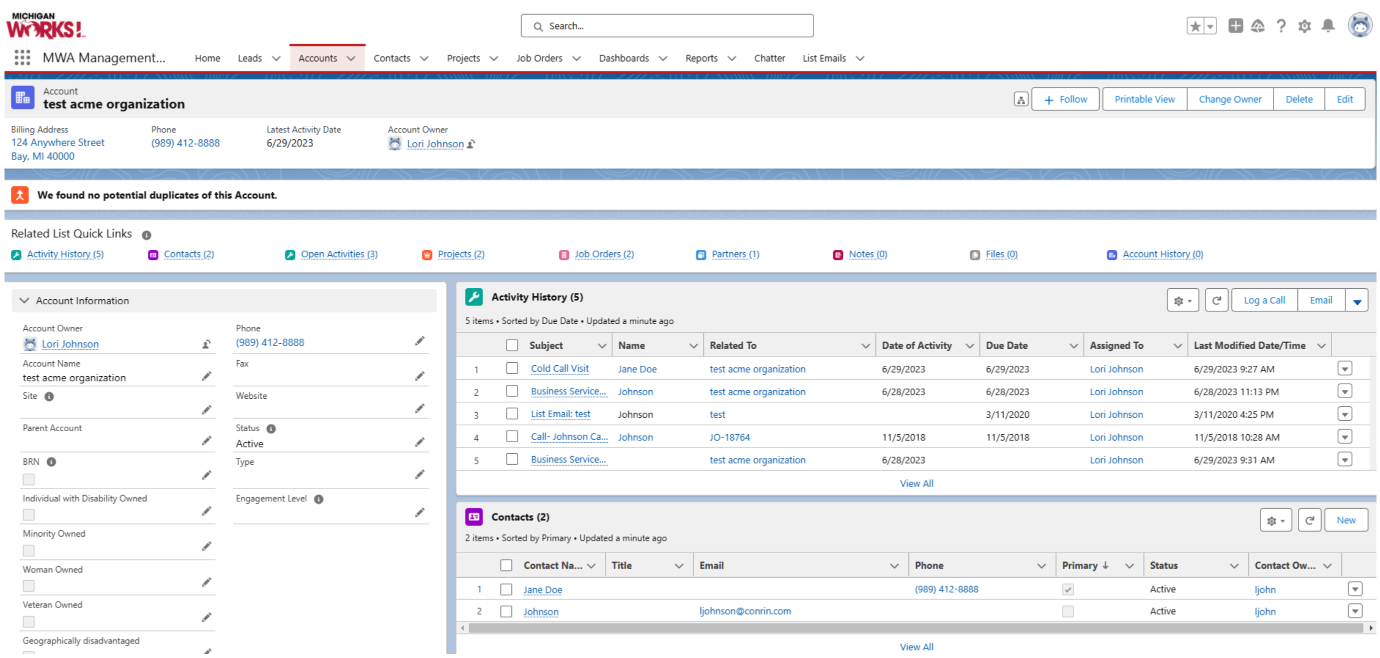
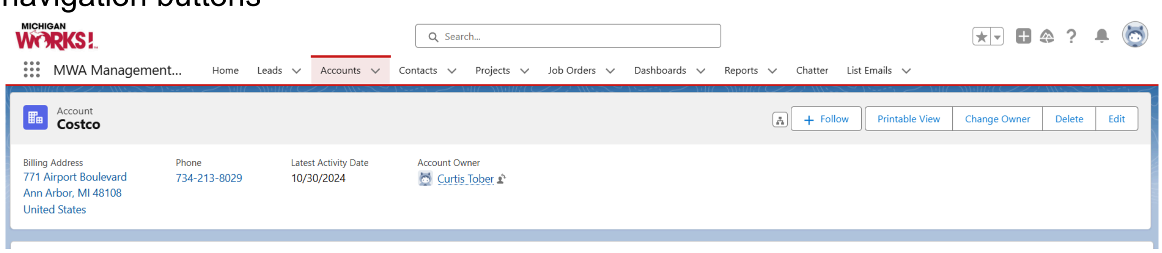
Navigating Accounts

Once you have an account created, any other record that is linked or related to the Account will be listed on the Account page.

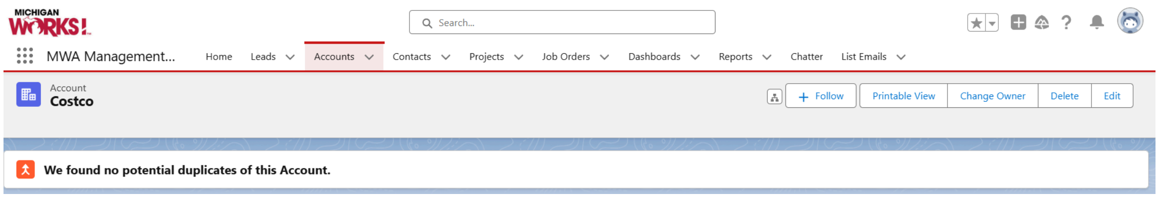
It is best practice to start all data entry from the Account record. This ensures that data is related back to the correct account. The Account landing page is mission control for your Accounts.



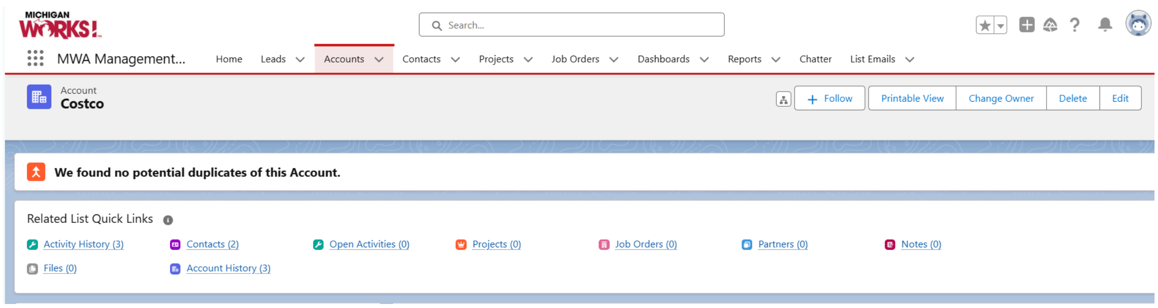
This top panel will include some quick information about the Account and provide navigation buttons



The next panel will show if there are potential duplicates.



Next are related quick links to other records that are directly related to this Account.



Hovering over each quick link will show a window where you can quickly access information. The account information is located in the panel down the left hand side of the screen. Here you can edit individual fields by clicking on the pencil.

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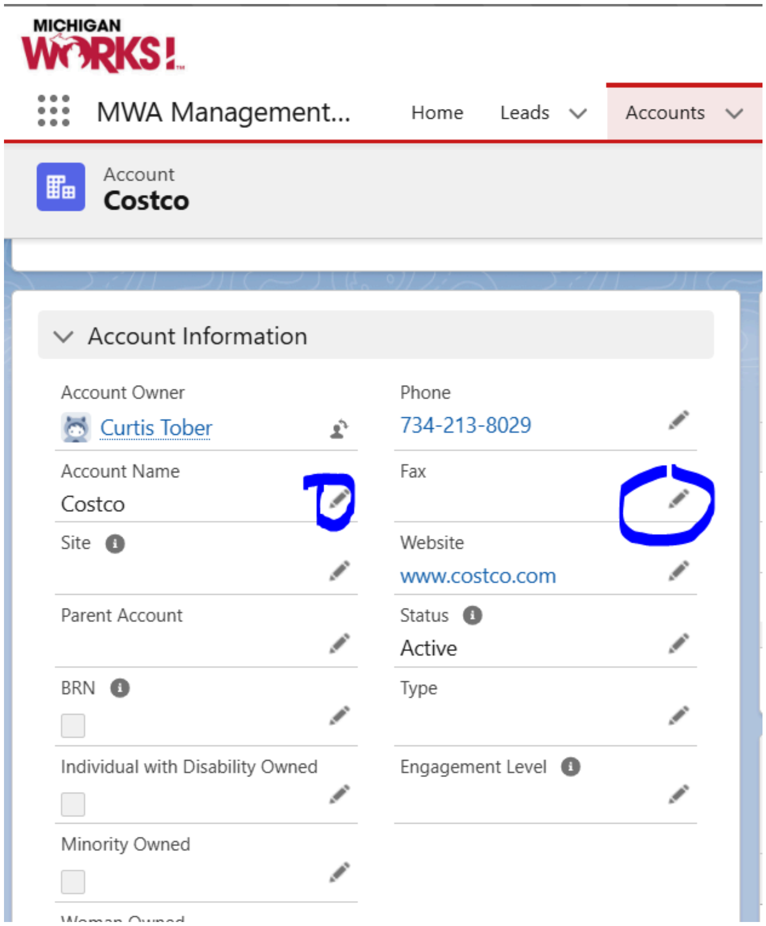
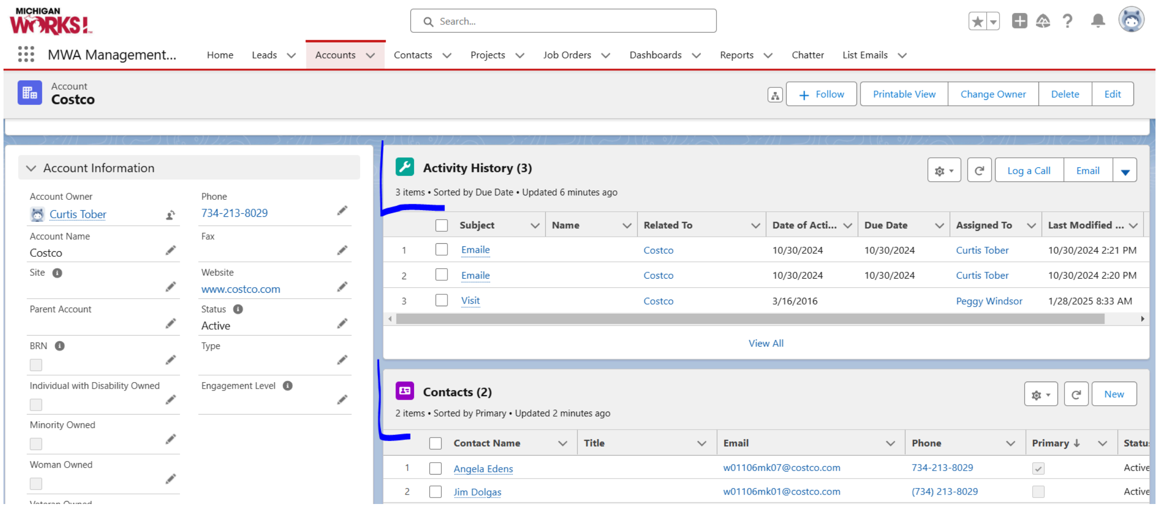


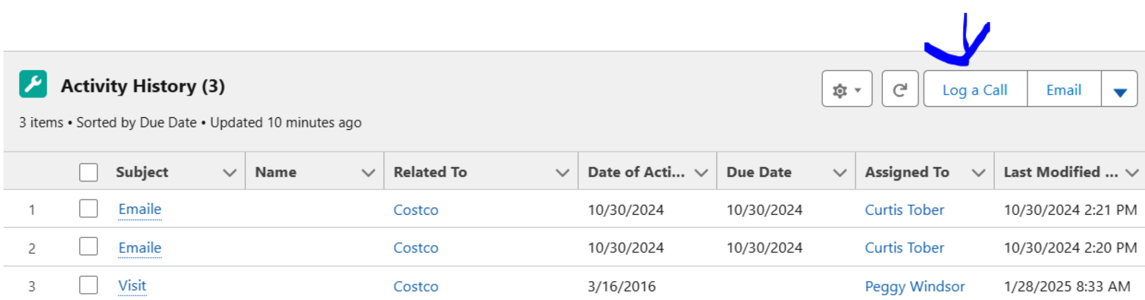
On the left side of the screen, the related lists are displayed in separate boxes where you can find additional information or add records.

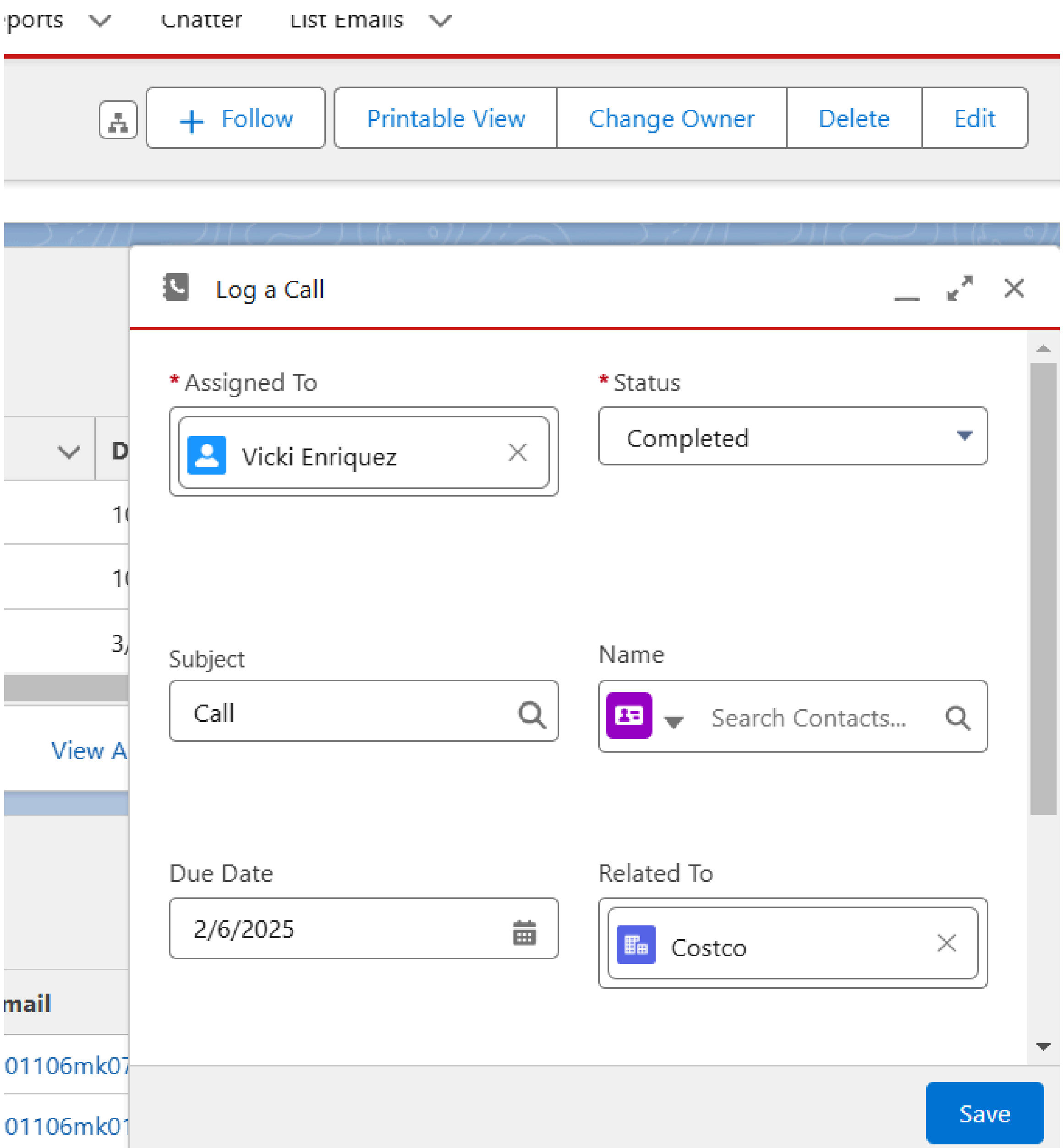


You can see in each related list item, you have the opportunity to create "New" items. This is the quickest way to enter new projects, contacts, job orders, and activities into SF.

WHAT ARE ACTIVITIES

The Activities tab is a place where you will log contact with an employer. You would not log a project or a job order here. Using the **LOG A CALL** button

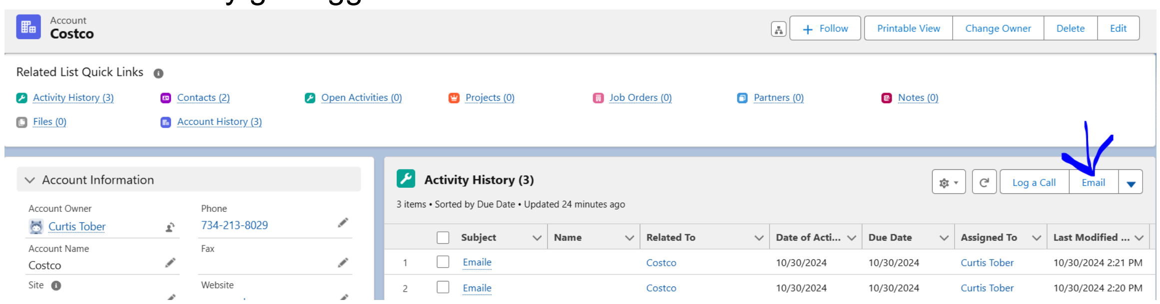


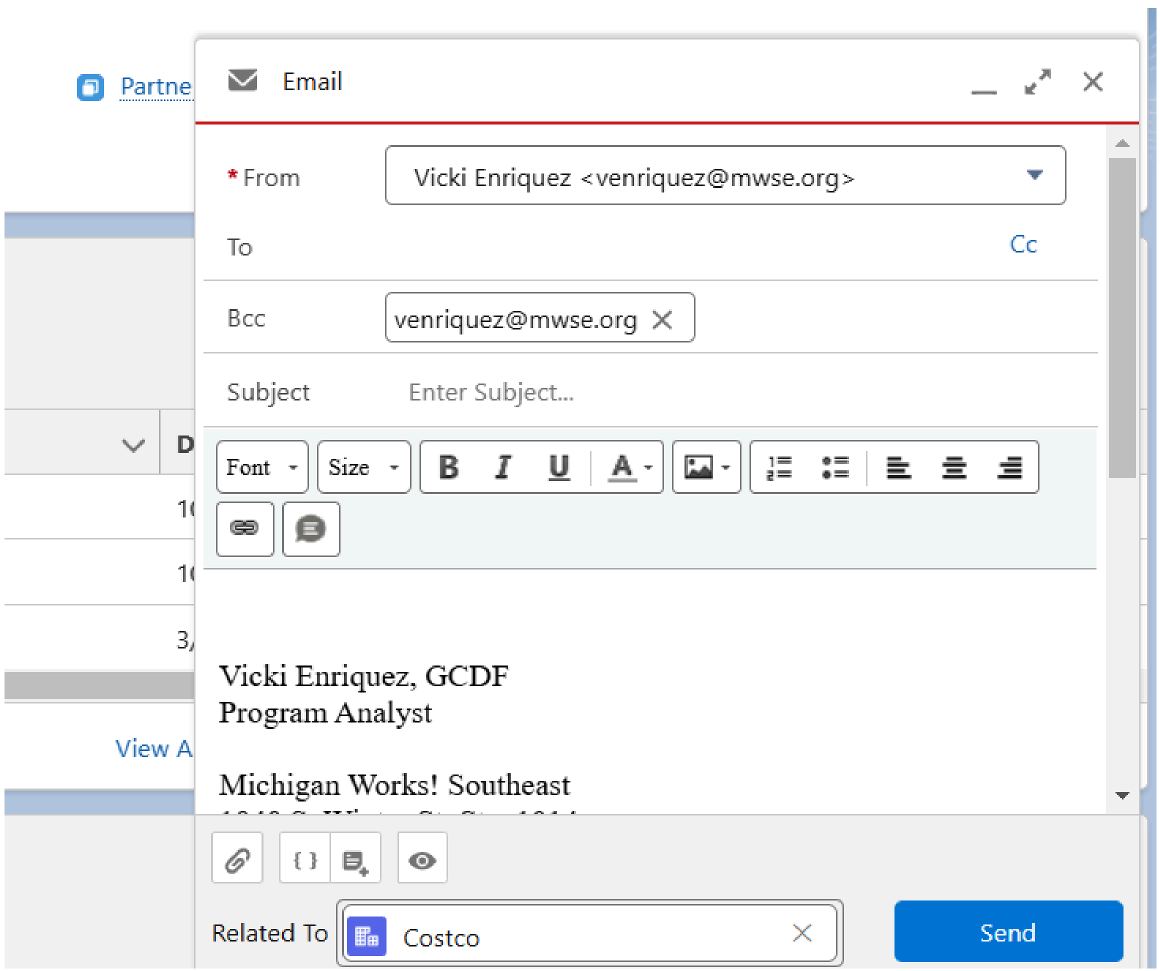


You can quickly log your recent contact with an employer by completing the fields. The system will automatically Assign this activity to you; however, you can assign the activity to a different user in your organization. When you assign an activity to another team member, they are notified via email and they also receive a task that will be present on their SF homepage.

The Subject field has drop down options or you can free type into the box. Be sure to check with your organization to determine the process and procedure for all data entry. You can also relate this activity to a contact that is related to this Account. Click in Search Contacts, and search the contact by Name. Choose the Date of the Activity and add Comments. Click Save.

You can directly send an email to a contact using the Activity related list, and it will automatically get logged into the contact and the account.





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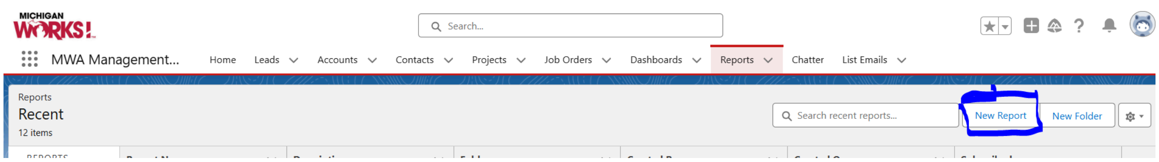
A word of caution: emailing from Salesforce will not save the email in your mail inbox.

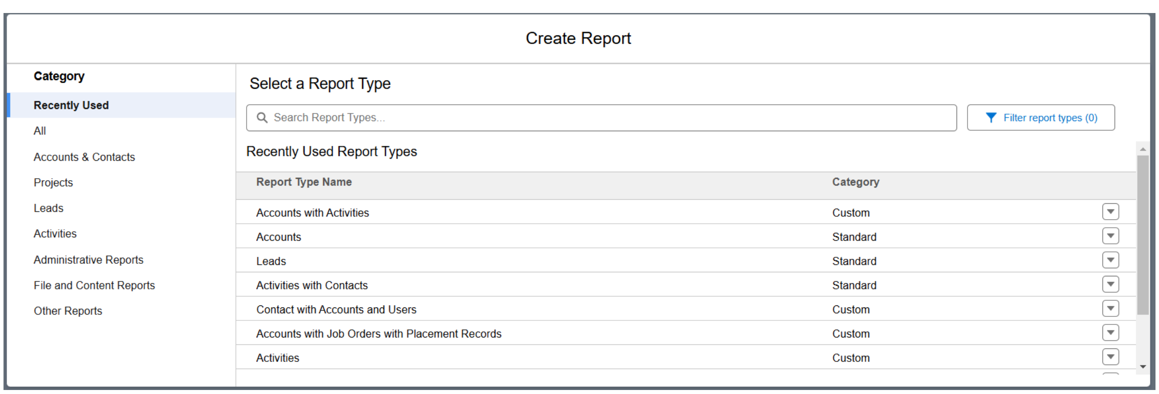
Report Writing

SF has extensive report writing capabilities that are easy to use due to the “drag and drop” feature. The following will provide the basics on report creation. Once you get to learn the system you will be able to apply it to any report writing requirements.

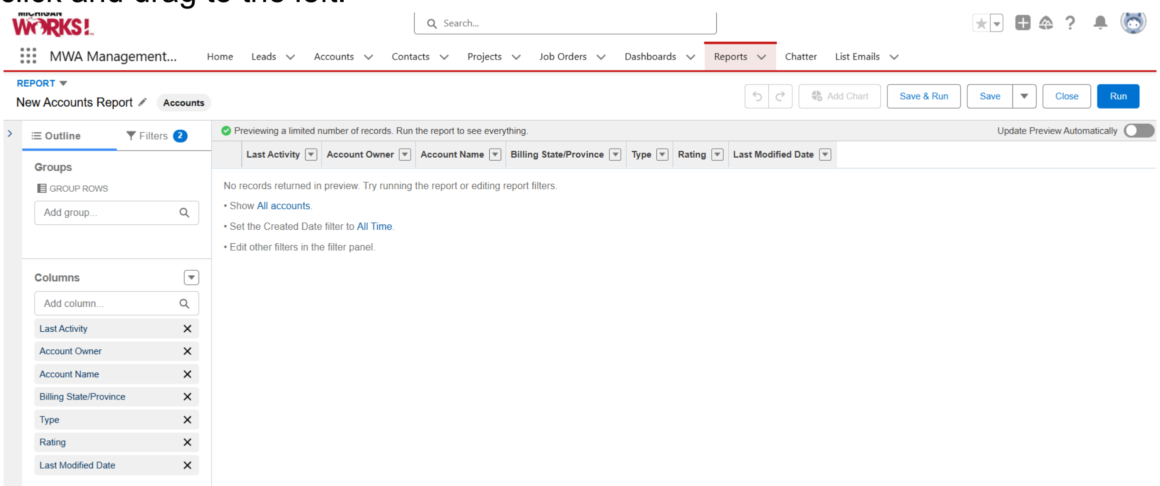
Click onto the Report tab then click onto the “New Report” button.



Next, choose a report type. For instance, if you want to create a report of all the accounts you have created this year, choose the Accounts and Contacts then click the Create button on the lower right side of the page. This will bring you to the “Accounts and Contacts” template from which you will start creating your report.



You will now be able to create the report. This is where you will identify the fields and logic needed to create your report. All the fields available for your report on on the left-hand side of the screen. To add a field, you can double click on the field or you can drag it the right and in place on the report. To take off a field, click and drag to the left.



Notice the Filter section at the top of the report creator. This is where you will choose how to filter your report by date or other filter options. You may also add a filter for any field you have included in your report by easily clicking the field name in the report and dragging to the top.

While choosing fields and filters, you will see a sample running of your report. This will not include all possible records. You must choose RUN at the top to run for all records. This new report will be detailed in a new screen. From this screen you can choose many options like Save, Export, Customize, or Schedule Reports.

After you have created a report, you may be able to turn it into a DASHBOARD which is a quick pictorial view of the report details. Reports that are turned into dashboards must be either a summary report or a matrix report. Tabular reports can be dashboards but are not available with gauge or metric dashboard components. Don't let this fancy language scare you…creating reports and dashboards are very easy and fun!

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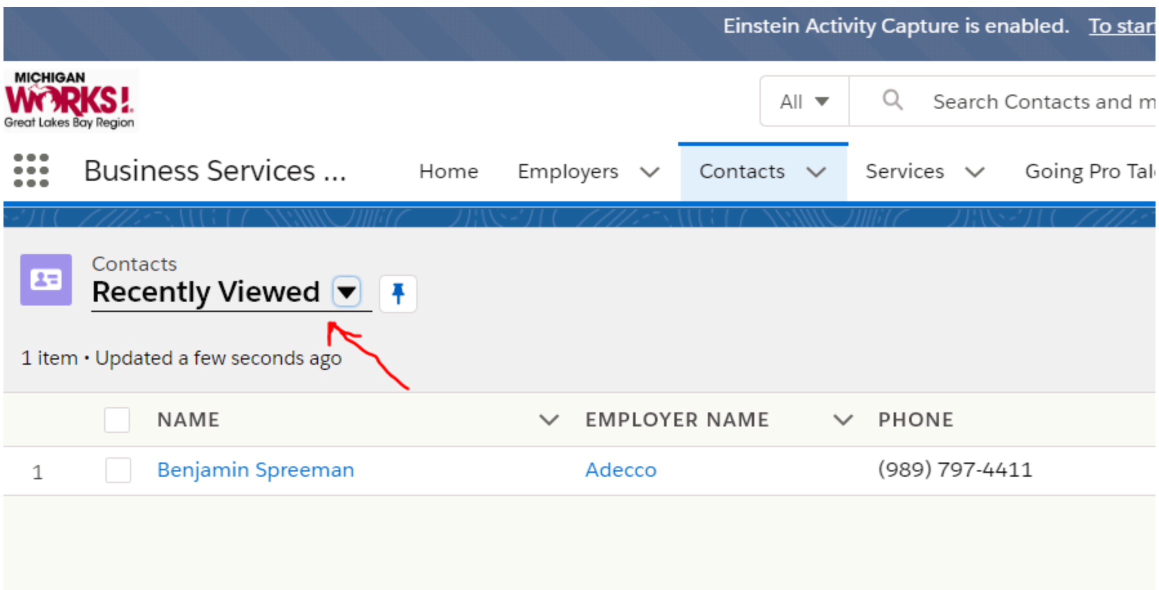
Mass Email Instructions

Using a "*List View*" you can create a List Email which will mass email contacts.

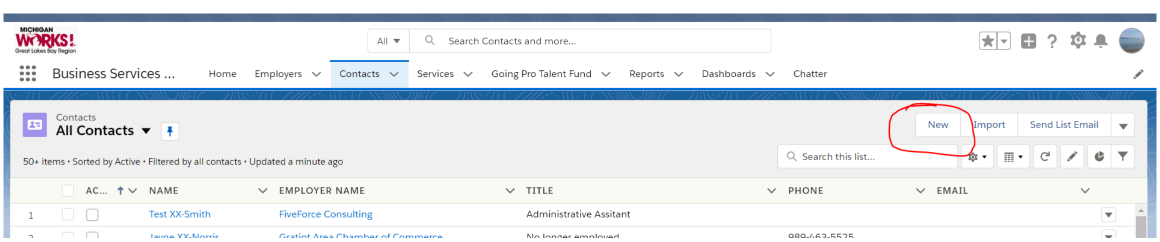
The first step will be to create a new list of contacts or use an existing list already in Salesforce.

To Create a List View:

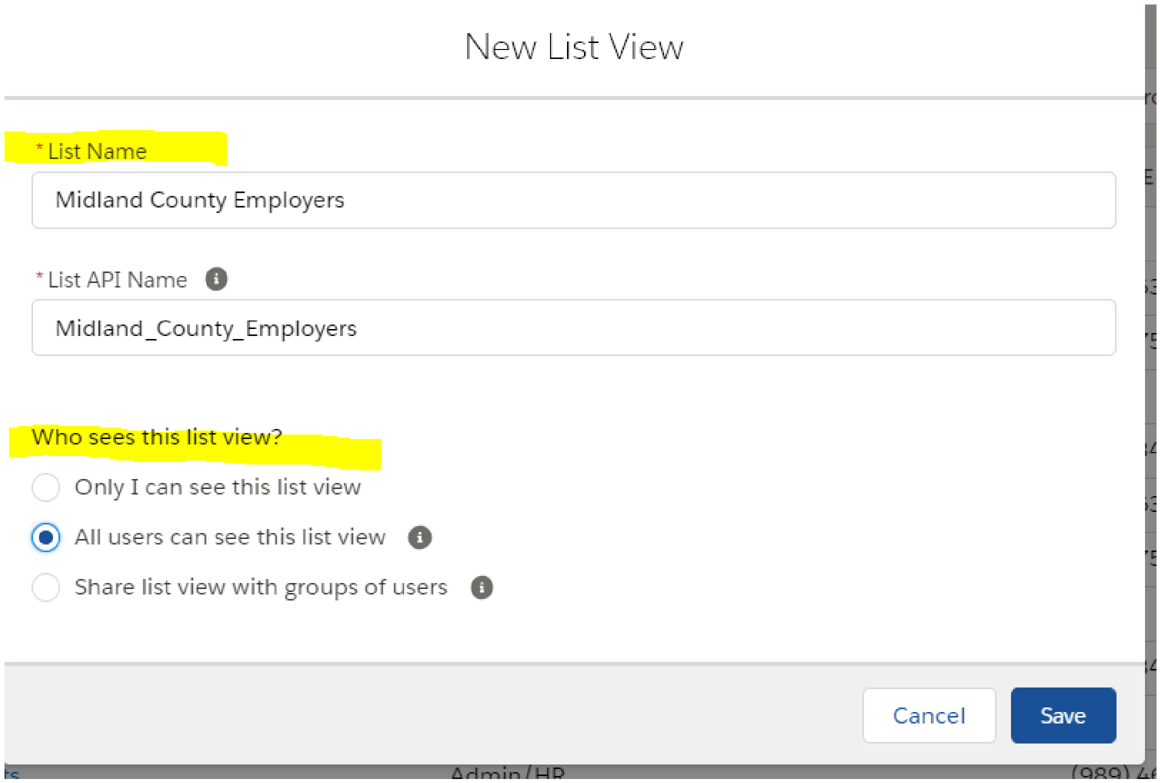
Navigate to the Contacts Tab. The red arrow below shows the "recently viewed" list. If you use the drop down arrow, you will find other list views. *Fun Fact: You can use the push pin next to the drop down arrow to PIN a favorite list view that you find handy*.



If you want to create a new list of contacts to send you mass email to, for example all Midland county employers, click on the gear and select NEW.

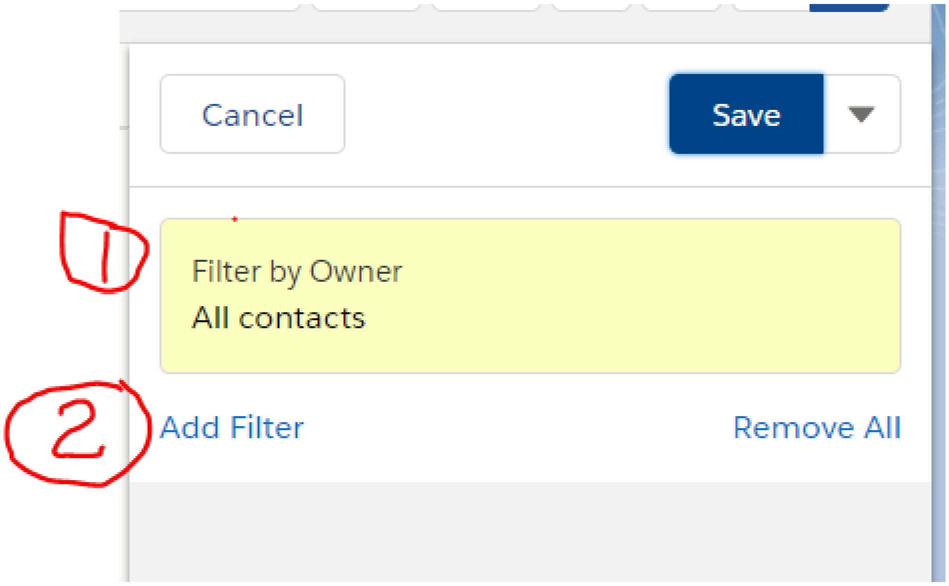


Give your list a name and choose who can view this list. Click Save.



Use the filters to create your specific list. 1. You may want to change the default filter from “My Contacts” to “All Contacts”. In this example, we will also filter for only Midland county employers.

2. Click Add Filter.

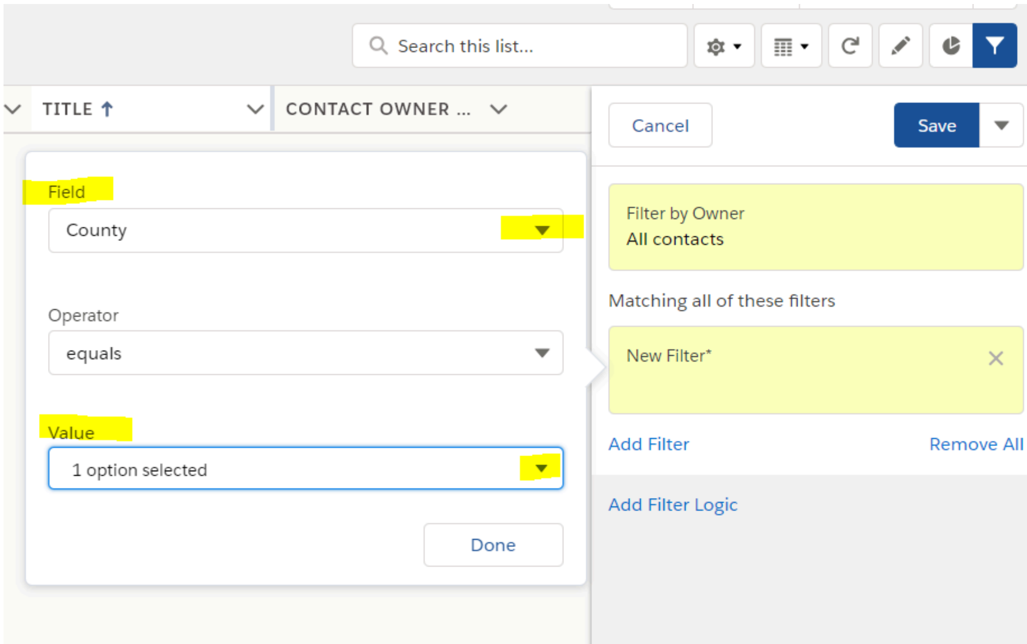


Use the drop down arrows to find the "Field" you would like to filter…in this example, "County".

Second, use the drop down arrow to pick the value of the field. You have a drop down here because this field is a picklist. If we had chosen to do Midland city employers, we would have chosen the City field and then in the Value box, typed in Midland.

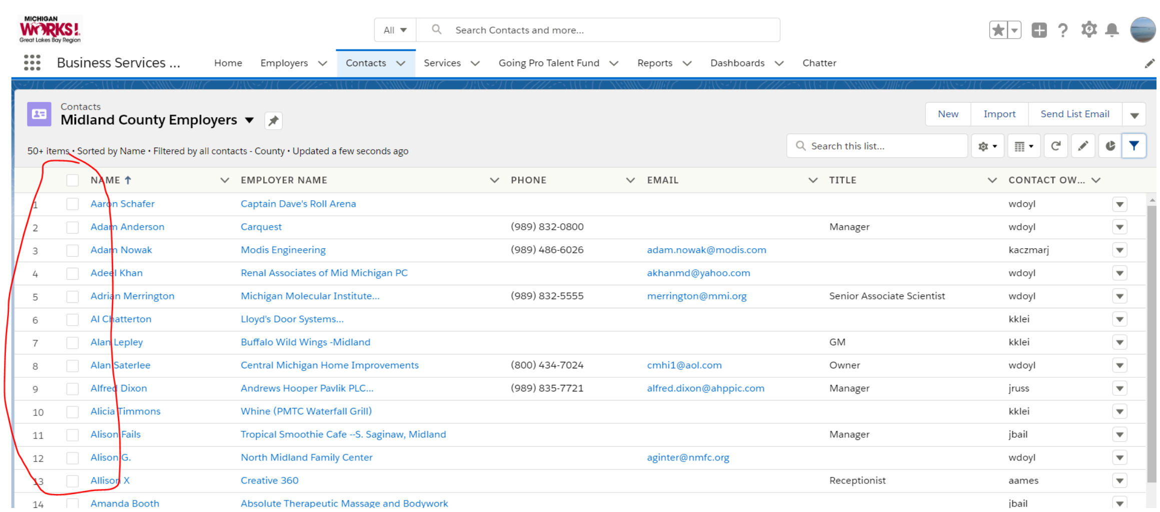
Click Done.

Then Click Save.

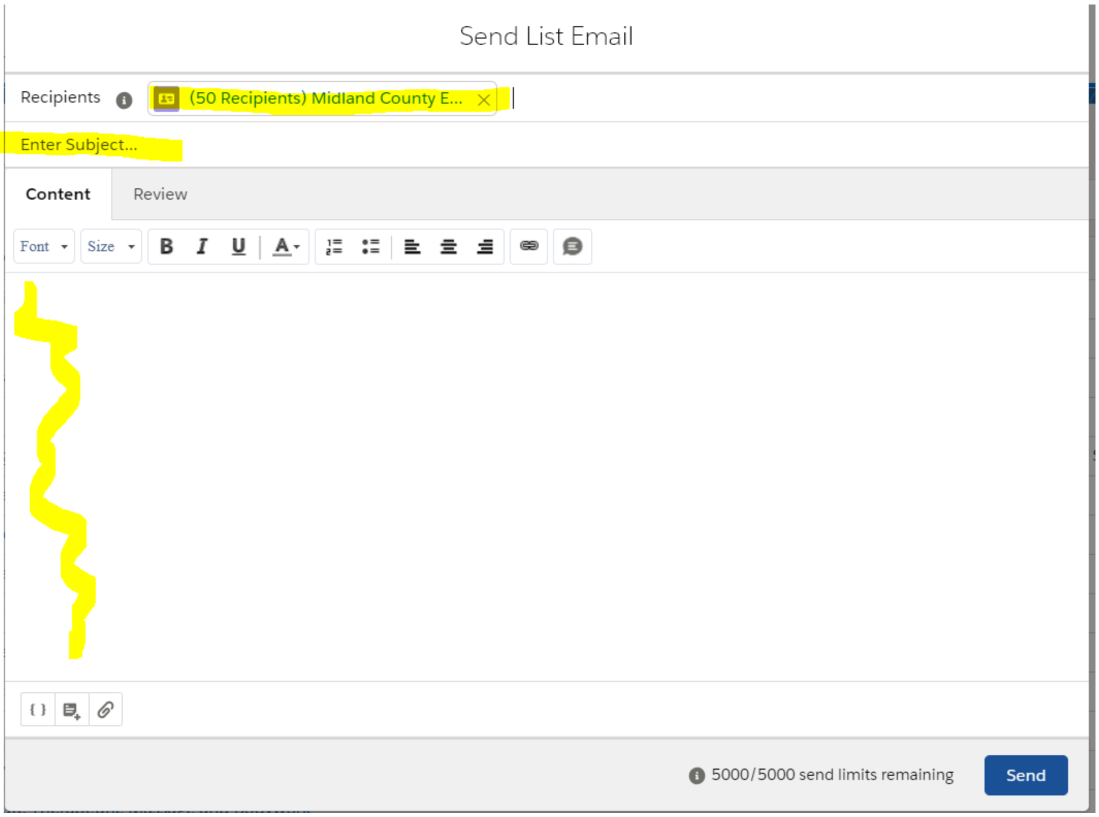


Your new list view will populate. Use the checkboxes next to the Name to choose which contacts you want to send the Mass Email.

Once you have selected all the contacts you would like to send the mass email to, click on the SEND LIST EMAIL button at the top right of the list. Note: There is a daily limit of 5,000 emails per day.



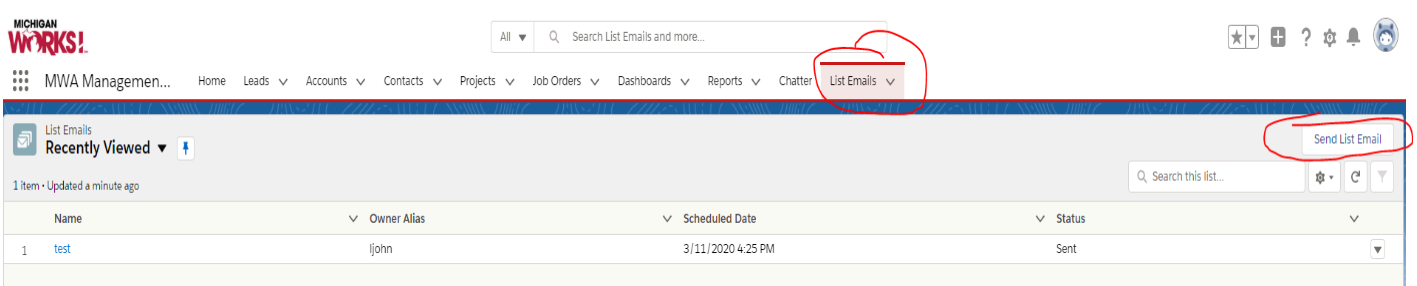
A new box will pop up to write your email. Notice that the contacts you choose from the list are already listed in the Following the email template to enter a subject and the content of your email. See that the contacts you choose in the prior step are already in the Recipients box.



At the bottom of the email box, there are three small icons. You can insert merge fields to personalize the email, for example Contact First Name. You can also create an email template to use for future and ongoing use, and you can attach files.

Mass Emails attach directly to the contact as an activity with the Subject as the identifier.

To find a listing of your sent or draft List Emails, use the LIST EMAILS tab in the navigation bar of Salesforce. You can also use the List Emails navigation tab to create a new list email-however, you must have the list view created first in the Contacts or Lead Tab.



Integrating Outlook & Gmail with Salesforce

Salesforce allows you to connect your **email inbox** (Outlook or Gmail) to log emails, sync contacts, and manage calendar events directly from your email. Users should verify with their Agency Salesforce Admin and/or IT Department before integrating. Follow the steps below to complete the setup.

For Outlook Users (Microsoft 365)

Step 1: Install the Salesforce Add-in for Outlook

1. Open **Outlook** and go to the **Home** tab.
2. Click on **Get Add-ins** (or **Apps** in some versions).
3. Search for **"Salesforce"** and select **"Salesforce for Outlook"**.
4. Click **Add** to install the extension.

Step 2: Log in to Salesforce

1. Open any email in Outlook.
2. Click the **Salesforce icon** in the toolbar (right panel may open automatically).
3. Click **Log In**, then enter your **Salesforce credentials**.
4. Allow permissions if prompted.

Step 3: Start Logging Emails & Syncing

- Open any email and click the **Salesforce icon** in Outlook.
- Click **Log Email** to associate it with a Contact, Lead, or Opportunity in Salesforce.
- Click **Add to Salesforce** to create a new record.
- Use the **Calendar Sync** to add meetings to Salesforce.

For Gmail Users (Google Workspace)

Step 1: Install the Salesforce Chrome Extension

1. Open **Google Chrome** and go to the **Chrome Web Store**.
2. Search for **"Salesforce Gmail Integration"**.

3. Click **Add to Chrome → Add Extension**.

Step 2: Log in to Salesforce

1. Open Gmail and click on any email.
2. In the right panel, find the **Salesforce icon**.
3. Click **Log In**, then enter your **Salesforce credentials**.
4. Allow permissions if prompted.

Step 3: Start Logging Emails & Syncing

- Open an email and click **Log to Salesforce** to attach it to a Contact, Lead, or Opportunity.
- Click **Add to Salesforce** to create a new record.
- Use the **Calendar Sync** feature to track events in Salesforce.

FAQs

What if I don't see the Salesforce panel in Outlook or Gmail?

- Click on the **Salesforce icon** in the toolbar or extensions area.
- Restart your browser (for Gmail) or Outlook.

Can I sync my calendar automatically?

- Yes, once logged in, enable **Calendar Sync** in the Salesforce side panel.

Who do I contact for help?

- Reach out to **your Agency Salesforce Admin** for troubleshooting. They will route the question to the MWA Salesforce Admin for assistance.