PROJECTS

CHANGE: Projects now only have four stages.

This will provide better reporting insight on where our project pipeline stands.

- 1) Opportunity/Lead
- 2) Project Quoted
- 3) Won
- or
- 4) Lost



CHANGE: Projects have a new required field - Pillar of Technology

Please complete this field going forward when creating projects. You can add more than one Pillar if applicable to a project.

vailable	Chosen
Access Control	•
Area of Rescue	
Blue Light Phones	
Mass Notification	

HOME PAGE

CHANGE: Everyone has access to the new Home page display.

This can be accessed by clicking "Home" in the SF toolbar, or this link.



CHANGE: You will see new dashboards (Team Activities and End User Accounts by Market Vertical)



Now live -

Custom Sales Requests button

This takes you directly to the form to add a new CUSTOM sales request.

Duplicate Quick Search button

This takes you directly to a shortcut to verify if an account or contact is already in CRM.



COMING SOON!

Trip & Meeting Planner

This will allow you to plan your trips according to city, state, or zip code. Using the Geolocation feature, you will be able to search and plan meetings not only by geographic location, but also by a specific Account Type or Vertical Market. This is currently being tested by Marketing & Sales.



Sales Team Bulletins & Campaigns

Marketing will be able to link PDF's of all recent Sales Announcements, Eblasts, and Current Campaigns so you can access these items from Salesforce. That way, everyone will have the updated versions to download and send as needed. This will help us all with version control.

SALESFORCE BEST PRACTICES

"I sent an email and received a bounce back."

Reminder: First, CALL the contact to confirm the correct email address (CHECK SPELLING).

Reminder: If the contact is no longer at the Company, click the box to indicate (see below).

Then, PLEASE update the account with the appropriate point of contact.

Talkap	hone	Home	Leads	 Accounts 	~	Contacts 🗸	Projects	∨ Pu	urchase Orders	\sim	RMAs	\sim	Products	\sim
Contact Gorde	on Skaggs	5 A												
Title Sales	Account Na	ame :o I	ł	Phone (2) ▼ 800-333-7769)	Email <mark>gordon</mark> @r	nartcoinc.co	om	Contact C	Owner Die Riv	′e 🖍			
🟃 We fou	nd no pote	ential d	uplicate	es of this co	ntact									
Details	Relate	d												
Name Gordon Skaş	ggs								6			ger wit	h company	
Title Sales									J.		Accoun Martco	t Nam o Inc.	e	
Phone 800-333-77	69										Email gordor	n@m	artcoinc.co	om
Mobile											Fax			

"There are duplicate contacts in Salesforce. How do I delete the wrong ones, but keep all the notes and activities?"

Reminder: Please don't ignore duplicates. Now that duplicate detection is enabled, all you have to do is click the "Possible Duplicate" box (see below).

Marketing will automatically get an email to merge the duplicates. (The same can be done for duplicate Accounts).

Contact Aaron Hallma	ark 🔺			
Title General Manager	Account Name Dowly (formar-Infrastruct Security, Inc)	Phone (2) ▼ (405) 607-5011	Email ahallmai	rk@rfip.com
X We found 1 pot	ential duplicate of this contact.			
Details Rela	ted			
Name Aaron Hallmark Title				No longer with compa
Phone (405) 607-5011				Email ahallmark@rfip.cor
Mobile				Fax 405-286-0656
✓ Address Information	tion			
Mailing Address 7720 N ROBINSON AV OKLAHOMA CITY, OK	E STE B3 73116-7734			
Coogle	Map data ©2019			
✓ System Informat	on	\mathbf{X}		
Created By	2016 1:03 PM		\rightarrow	Last Modified By

Kudos to Mikki and Tim for flagging duplicates already!