

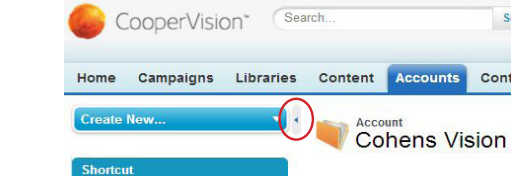
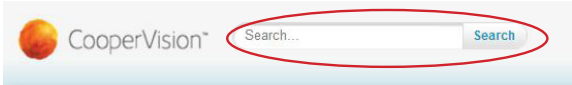



Salesforce.com Tips & Tricks

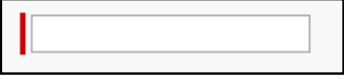


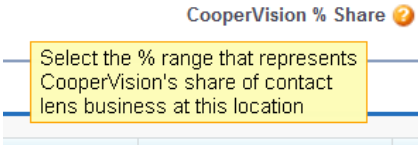
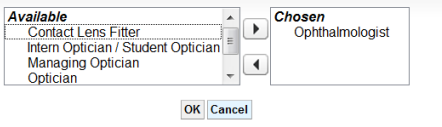
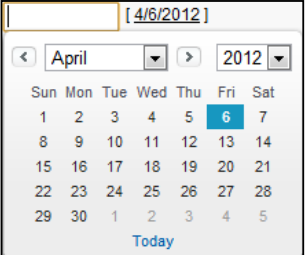
Navigation and Definitions

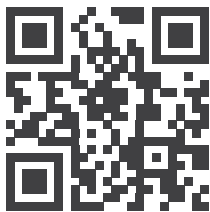
- **Location Account** – physical location; not an account from which a person can order CVI products.
- **Buyer Account** – account that can order CooperVision products.
- **Direct Account** – account number that one or many doctors can use to order CooperVision products from CVI.
- **Indirect Accounts** – distributors and these sales are ONLY associated to a Location Account.
- **Contact** – an individual that can be associated with a Location account. Contacts can be related to multiple Location Accounts.
- **Campaigns** – used to track marketing promotion and program activity.
- **Activity** – interaction with a customer that must be captured within the salesforce.com CRM system.
- **Task** – type of activity that is a ‘to-do’ assigned to a specific user in Salesforce.
- **Event** – type of activity that is a calendar item which has a specific start and end date/time.

Rules and Shortcuts

<p>To expand your salesforce.com screen, you can turn the sidebar off – click the arrow on the top left as seen in image below.</p>	
<p>Use the Search function to search ALL objects in SFDC.</p>	
<p>Create Contacts at the Location Account. Create the Sales Call Planner at the Location Account.</p>	<p>Account Detail</p> <p>CV Account Name SOUTH EAST EYECARE PSC [View Hierarchy]</p> <p>Account Record Type AMER Location Account Account Owner System Integration</p>
<p>Create Cases at the Buyer Account level.</p>	<p>Account Detail View Price List</p> <p>CV Account Name SOUTH EAST EYECARE, PSC [View Hierarchy]</p> <p>Account Record Type AMER Buyer Account Account Owner System Integration</p>
<p>Always click ‘save’ button after entering information on the record. Use inline editing (pencil mark) to edit the records for ease and convenience.</p>	<p>Contact Dr. Barbara Aalbers</p> <p>Show Feed Follow</p> <p>Back to List: Contacts Contact Relationships [1] Fitting Habits [0] Open Activities [0] Act Contact Hist</p> <p>Contact Detail Save Cancel</p> <p>Title [inline edit pencil icon]</p>
<p>Use Hover links to avoid scrolling to the related lists.</p>	

Standard Annotations

Symbol	Significance
	A red mark before any field implies the field is mandatory.
	A magnifying glass indicates a 'look-up' field; it can only be populated by clicking the icon and searching for & selecting a record from the pop-up screen.
	A pencil indicates that a field can be edited by double clicking in the blue area and clicking to save your edits. A lock indicates a field may not be edited.
	A question mark offers additional help text detailing the purpose and function of a field. View the text by hovering over the question mark icon.
	A multi-select pick list allows selection of multiple values. Select a value and click the right arrow to add or left arrow to remove.
	A date field can be populated by clicking in the open box field. This opens up a calendar in a pop-up window; select a date to populate the field. To enter today's date, simply click the date link next to the field.



Scan for more SFDC information.



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