

*Clipper* MAGAZINE



salesforce



**Orientation**

# AGENDA



1. Tips
2. Definitions
3. Search / Navigating
4. Intro to Leads
5. Prospect Finder

# AGENDA



6. Working Leads
7. Task/Event Entry
8. Managing Tasks
9. Helpful Resources
10. Salesforce 101 Wrap-up
11. Next Steps

**TIPS**

# TIPS



We use 2 versions of Salesforce –  
**PC & Mac/iPad**



Best Internet browser for Salesforce  
on a PC/Android is **Chrome**



Best Internet browser for  
Salesforce on a Mac/iPad is **Safari**



# TRAIN ENVIRONMENT TIPS



When creating Leads, please use Valpak of Kings County as the Franchise.



When adding Clipp Distribution to a Quote, use Clipper of PA – Pittsburgh .



Make sure you check your test Lead/Account email address before trying to send emails in Salesforce Train.

# Definitions

# TYPES OF RECORDS



Salesforce is based on an object model – that basically means the data is grouped in “buckets”. Each object or bucket holds a specific set of data – leads, accounts, contacts, etc.

At 1<sup>st</sup> glance, you see “tabs” that represent the different buckets. When you go into a specific tab like Leads, you are diving into the bucket of lead data.



# TYPES OF RECORDS: LEADS

A lead is a person or a company that might be interested in our product or service. Think of a lead as a business card. Business Cards are associated to 1 business and 1 person's contact information. Salesforce is the bowl at the front desk that has all your leads or "business cards" in it.

As you reach out and try to set an appointment, you will move the lead through the attempt process. We will go over these steps in a few slides.

Once you have set a meeting with the Lead, you convert it into a Prospect Account.



Lead



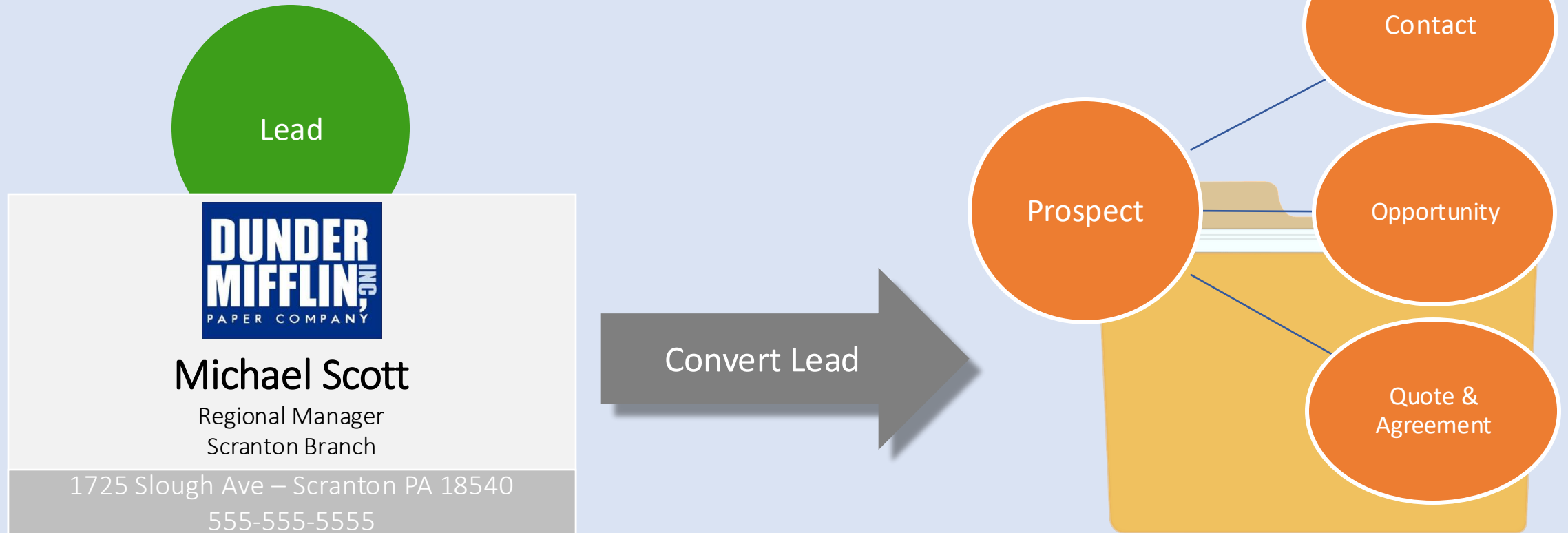
**Michael Scott**

Regional Manager  
Scranton Branch

1725 Slough Ave – Scranton PA 18540  
555-555-5555

# TYPES OF RECORDS: PROSPECT ACCOUNTS

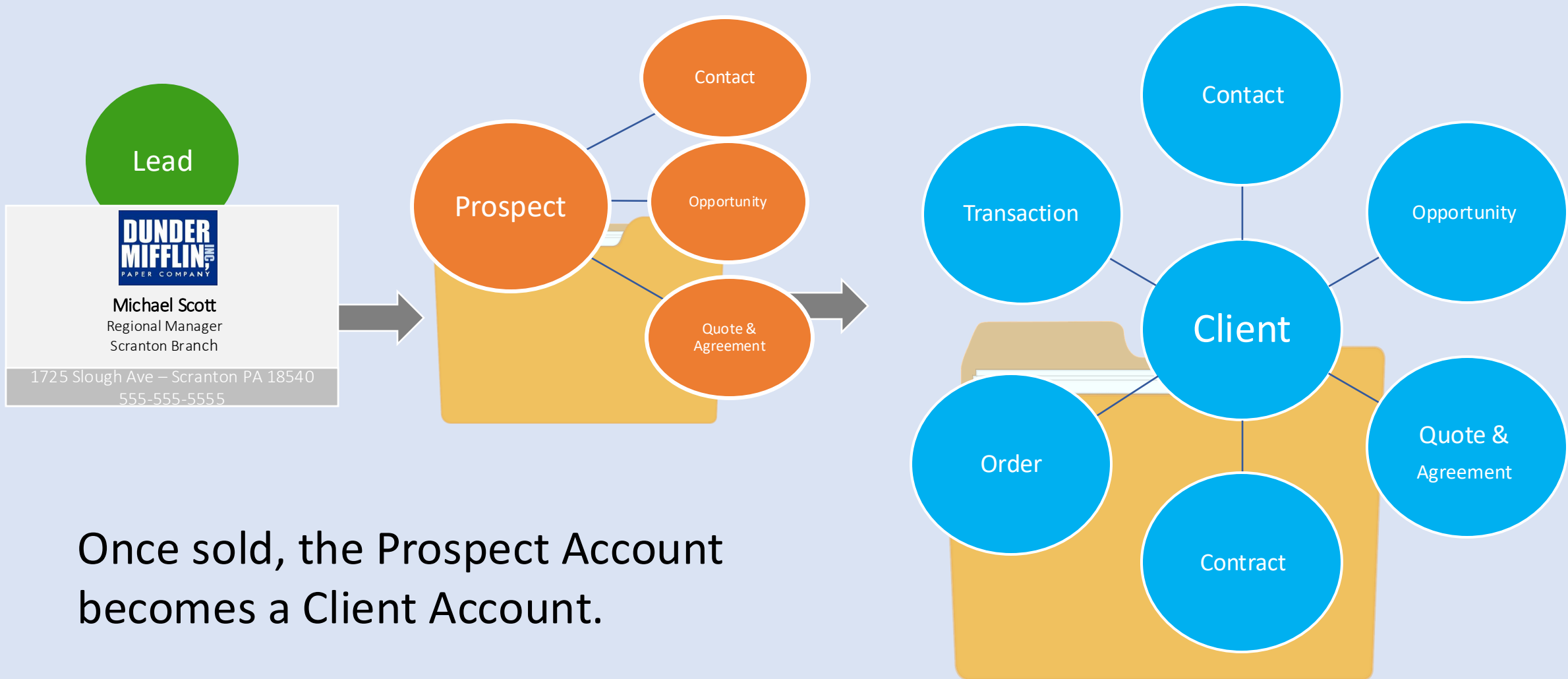
(Salesforce Account)



Prospect Accounts are converted Leads that you have an appointment with but have not yet sold.

# TYPES OF RECORDS: CLIENT ACCOUNTS

## (Financial Account)



Once sold, the Prospect Account becomes a Client Account.

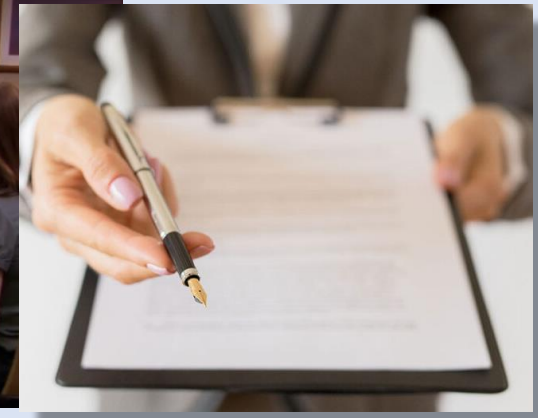
# RECORD FLOW



Lead



Prospect Account



Client Account

***Prospecting Attempts***  
***(Calls, E-Mails, In Person, Social Media & Texts)***

Tell a story...

- Your LEAD is Dunder Mifflin and you're trying to reach Michael Scott. He's very busy...often in long meetings or out trying to find a cure for rabies. It takes several ATTEMPTS via calls, emails, texts and stop ins to set an appointment. Luckily, Pam was helpful and got you a meeting.
- Dunder Mifflin is now a Prospect Account. You meet, wow him with pictures of our print facility and sell him a 6X agreement for 100M homes. YAY! He's now a CLIENT ACCOUNT

# TYPES OF RECORDS: EXAMPLES

**Lead**  
**Israeli Krav Maga**

+ Follow Launch Quick Convert Edit New Note Send Engage Email

Name: Don Melnick | Phone (2): +77(4)6158863345 | Email: atran@example.com | Lead Source: In person | Category: Entertainment / Recreation / Leisure [3] | Sub Category: Martial Arts [71]

Launch Campaigns (0) Campaign History (5) Lead History (0) Lead Owner Statistics (1) Notes (0) Files (0) Status History (0) Cases (0)

Open Attempt 1 Attempt 2 Attempt 3 Attempt 4 Attempt 5 Attempt 6 Attempt 7 Attempt 8 Contacted Parking Lot Not Mark Status as Complete

**Key Fields** Edit Guidance for Success

Phone: +77(4)6158863345  
Appt. Notes  
Email: atran@example.com  
Address: 2020 Springdale Rd Suite 250, CHERRY HILL, NJ 08003, US

**Account**  
**€ Kumon**

+ Follow New Task Launch

Type	VPO Status	Phone	Category	Account Ext ID	Unpaid Invoice Balance
Prospect		822.599.9588x877	General Services [4]		USD 0.00

Contacts (1) Cases (0) Opportunities (1) Quotes (0) Contracts (0)  
Transactions (0) Chargent Payment Requ... Payment Consents (0) VPO Orders (Print Acco... VPO Orde...  
Show All (24)

Feed **Details** Marketing Billing Dates Open Items Statement Sales

Account Owner	Phone
<a href="#">Omar Ochoa</a>	822.599.9588x877
Account Name	Fax
€ Kumon	
Category	Website
General Services [4]	
Sub Category	Parent Account
Schools-Public and Private [122]	
NAIC	Bill To Contact
Reactivation Status	Covid-19 Cancellation

**Account**  
**"A" DRY CLEANERS**

+ Follow New Task Launch

Type	VPO Status	Phone	Category	Account Ext ID	Unpaid Invoice Balance
Client	Active	(521)618-1518x03324	General Services [4]	319100195	USD 0.00

Contacts (1) Cases (0) Opportunities (0) Quotes (0) Contracts (0)  
Transactions (0) Chargent Payment Requ... Payment Consents (0) VPO Orders (Print Acco... VPO Orders (Digital Acco...  
Show All (24)


Feed **Details** Marketing Billing Dates Open Items Statement Sales

Account Owner	Phone
<a href="#">Tula Anagnostou</a>	(521)618-1518x03324
Account Name	Fax
"A" DRY CLEANERS	
Category	Website
General Services [4]	
Sub Category	Parent Account
Dry Cleaners / Laundry [40]	
NAIC	Bill To Contact
DRY CLEANING & LAUNDRY SVCS	
Reactivation Status	Covid-19 Cancellation

**Search & Navigate**



# HOME PAGE

★ + ? 📧 🗺

[Franchise Sales](#) [Home](#) [Contacts](#) [Sales Lens](#) [Accounts](#) [Leads](#) [Tasks](#) [VPO Orders](#) [Quotes](#) [Opportunities](#) [Cases](#) [Dashboards](#) [Reports](#) [Calendar](#) [Contracts](#) [Agreements](#) [Engage Alerts](#) [More](#)

**Dashboard**  
**Sales Rep Home Dashboard**  
Sales Rep Home Dashboard  
As of Dec 11, 2023, 2:11 PM - Viewing as Katherine Edwards

[+ Follow](#) [Open](#) [Refresh](#)

**Quotes in Manager Review**  
Pending Manager Action  
0  
[View Report \(My Quotes in Manager Review\)](#)

**Quotes in Client Review**  
Pending Client Action  
0  
[View Report \(My Quotes in Client Review\)](#)

**Quotes Waiting for Countersignat...**  
Pending Rep Action  
0  
[View Report \(My Quotes Waiting for Countersignat...\)](#)

**My Activities Created Today**  
Tasks + Events - Leads & Prospects  
0  
[View Report \(My Activities Created Today\)](#)

**Key Links**

- [Prospect Finder](#)
- [Blue Vue](#)
- [Valpak University](#)
- [Engage Alerts](#)
- [Calendar](#)

**Today's Tasks**

Nothing due today. Be a go-getter, and check back soon.

[View All](#)

**Today's Events**

Looks like you're free and clear the rest of the day.

[View Calendar](#)

**Salesforce Billing Commissions**  
[View Dashboard](#)

**Chargent Rep**  
[View Dashboard](#)

**Franchise Support Cases: Reps**  
[View Dashboard](#)

**Activity Tracker Calls and Appointments**  
[View Dashboard](#)

[PlusOne Inventory Report](#)

▼ Mailing Dates

**My Valpak Mailing Schedule**

Market:  State or Zip:  MailDate From:  MailDate To:  [View](#)

Name	Mail Date	In-Home ...	#NTAs	Franc...	MP Yr...
678214	01/12/2024	01/16/2024	25	Charlotte [...]	2024-01
678215	02/09/2024	02/12/2024	25	Charlotte [...]	2024-02
678216	03/08/2024	03/11/2024	25	Charlotte [...]	2024-03
678217	04/12/2024	04/15/2024	25	Charlotte [...]	2024-04
678218	05/10/2024	05/13/2024	25	Charlotte [...]	2024-05
678219	06/07/2024	06/10/2024	25	Charlotte [...]	2024-06

[Recent Items](#) [Help and Support](#) [Daily Dashboards & Reports](#) [Daily List Views](#) [CPQ Help Links](#) [Payment Help Links](#) [Salesforce Help Links](#) [Sales Tools](#) [Recent Enhancements](#) [To Do List](#)

# CALENDAR

You can access your calendar from your Home Page Key Link section or on the Navigation bar.

The screenshot displays a Salesforce dashboard interface. At the top, there is a navigation bar with a search field and a menu containing: Leads, Accounts, Contacts, Out Queues, Tasks, Chatter, Dashboards, Approvers, Opportunities, and More. Below the navigation bar, the dashboard is divided into several sections. On the left, there are widgets for 'Countersi...' and 'Activities Created Today - All Tasks + Events - Leads & Prospects'. In the center, there are two key link tiles: 'Calendar' (represented by a purple calendar icon) and 'Virtual Envelope' (represented by a purple star icon). On the right side, there is a 'LEADERSHIP DASHBOARDS' section with links for Conversion Rates, Churn, Reactivation, Customer Satisfaction, and Rate Card Analysis. Below this is a 'Salesforce Billing Commissions' section with a 'View Dashboard' link. Further down are sections for 'Chargent Rep', 'Franchise Support Cases: Reps', and 'Activity Tracker Calls and Appointments', each with a 'View Dashboard' link. At the bottom right, there is a 'PlusOne Inventory Report' link. A vertical navigation menu is open on the right side of the dashboard, listing various application areas: VPO Orders, Cases, Sales Lens, Calendar (highlighted with a blue border), Contracts, Agreements, Engage Alerts, Engage Team Reports, Campaigns, Prospect Finder, Blue Vue, Mailing Schedule, Recycle Bin, Valpak University, Scan to Salesforce, Virtual Envelope, and Compensation Processing. At the bottom of the dashboard, there is a footer with links for Payment Help Links, Salesforce Help Links, Sales Tools, Recent Enhancements, and To Do List.

# CALENDAR

valpak  ★ + 🔔 ? ⚙️ 👤

Franchise Sales Home Reports Access Request User Defaults Quotes Leads Accounts Contacts Out Queues Tasks Chatter Dashboards Approvers Calendar **More**

Calendar **June 2024** < > Today 🔄 📅 New Event ☰

SUN	MON	TUE	WED	THU	FRI	SAT
May 26	27	28	29	30	31	Jun 1
2	3	4	5	6	7 8am 🌅 ***	8
9	10	11	12	13	14 11:15am Meet Jan and Michae...	15
16	17	18	19	20	21 8am 🌅 ***	22
23	24	25	26	27	28	29
30	Jul 1	2	3	4	5 8am 🌅 ***	6

◀ JUNE ▶ 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

**My Calendars** ⚙️

- 📅 My Events ▼

**Other Calendars** ⚙️

- 📅 Rip Wheeler ▼

🏠 Recent Items ? Help and Support ★ Daily Dashboards & Reports ★ Daily List Views ⚡ CPQ Help Links ⚡ Payment Help Links ⚡ Salesforce Help Links 🛒 Sales Tools 📧 Recent Enhancements 📋 To Do List

# UPDATE YOUR SALESFORCE PICTURE

The screenshot shows the Salesforce user interface for Katie Melech. At the top right, a user menu (callout 1) is open, showing the user's name, email, and options like 'Settings' and 'Log Out'. Below the menu, the profile picture (callout 2) is visible. The main profile section (callout 3) displays the user's name, title 'CRM Database Administrator & Training Coordinator', and a bio. Below the profile, there are quick links for 'Team (1)', 'Files (10+)', 'Groups (6)', and 'Followers (2)'. The 'Details' tab is active, showing fields for Name, Title, Manager, Company Name, and VPO All Staff Ids. To the right, the 'User Staff Details(1)' section shows fields for Active status, Primary ID, Account, and Account Control. The bottom navigation bar includes links for 'Recent Items', 'Help and Support', 'Daily Dashboards & Reports', 'Daily List Views', 'CPQ Help Links', 'Payment Help Links', 'Salesforce Help Links', 'Sales Tools', 'Recent Enhancements', and 'To Do List'.

You can update your Salesforce picture by going to your profile and click on the image again.

# UPDATE YOUR USER PROFILE

You may wish to add your cell number or change your first name to an abbreviated name, you have access to make these changes to your user profile. However, please use your legal name – Mike instead of Michael is fine, but don't use nicknames or preferred names. Salesforce uses the name fields for the CPQ agreements that we'll learn more about later. Agreements are legal documents; therefore, we need your legal name. You must also use your @clippermagazine email address, no exceptions.

The screenshot displays the Salesforce user profile page for Katie Melech. The page is annotated with three numbered callouts:

- 1**: Points to the user profile header in the top right corner, showing the user's name, email, and links for Settings and Log Out.
- 2**: Points to the 'Personal Information' tab in the main content area.
- 3**: Points to the 'Personal Information' menu item in the left sidebar.

The 'Personal Information' section includes the following fields:

- First Name: Katie
- Last Name: Melech
- Alias: kmele
- Email: katie\_melech@valpak.com
- Username: katie\_melech@valpak.com
- Nickname: Katie\_Melech
- Phone: (727) 568-4375
- Address: 1 Valpak Ave North, St. Petersburg, FL 33716, US

The 'My Work Information' section includes the following fields:

- Company Name: Valpak of Home Office
- Title: Salesforce CRM Database A
- Department:
- Division:
- Employee Number:
- Start of Day: 6:00 AM
- End of Day: 11:00 PM

# UPDATE YOUR SALESFORCE SIGNATURE

The screenshot shows the Salesforce user interface for 'My Email Settings'. The page is titled 'My Email Settings' and contains several sections:

- List Emails:** Includes fields for 'Email Name' (Katie Melech) and 'Email Address' (katie\_melech@valpak.com). There is a radio button for 'Automatic Bcc' set to 'Yes'.
- Signature:** A text area for the signature, currently containing 'Katie Melech', 'Salesforce Admin', and '727-201-6786'.

Five numbered callouts indicate the steps to update the signature:

- 1: Click on the user profile icon in the top right corner.
- 2: Click on 'Settings' in the user profile dropdown menu.
- 3: Click on 'My Email Settings' in the left-hand navigation menu.
- 4: Click on the signature text area to edit the signature.
- 5: Click on the 'Save' button at the bottom of the settings page.

You can update your Salesforce signature by going to settings, email settings, and adding your email signature.



# UPDATE YOUR CHATTER SETTINGS

The screenshot shows the Salesforce Chatter Email Notifications settings page. The page is titled "Email Notifications" and is divided into several sections: "General", "Personal", "Groups", and a table for "Group" settings. The "General" section has a "Receive emails" checkbox checked. The "Personal" section has several notification options checked, including "Follows me", "Posts on my profile", "Shares a post I made", "Comments on my posts", "Comments on a post on my profile", "Comments after me", "Comments on an item I bookmarked", "Comments on an item I like", "Mentions me in a post", "Mentions me in a comment", "Sends me a message", and "Endorses me on a topic". The "Groups" section has a "Set default frequency for groups I join" dropdown set to "Daily". The table below shows the default frequency for various groups.

Group	Email on Each Post	Daily Digests	Weekly Digests	Limited
Ring the Bell	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Salesforce Release Updates	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Seller Experience Advisory Board	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Southeast Shout Out Group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Team Awesome Shout Out Group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
The Spark	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

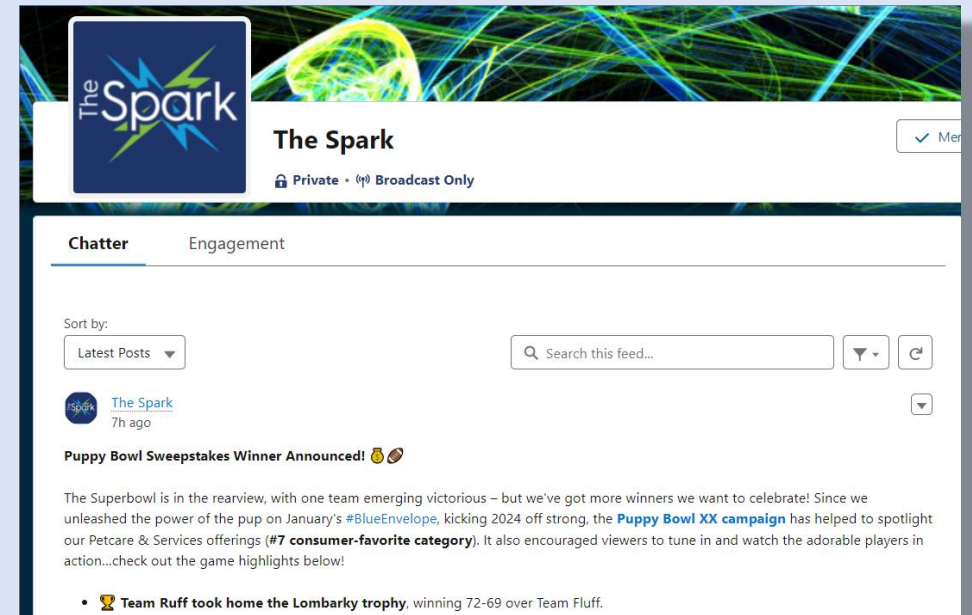
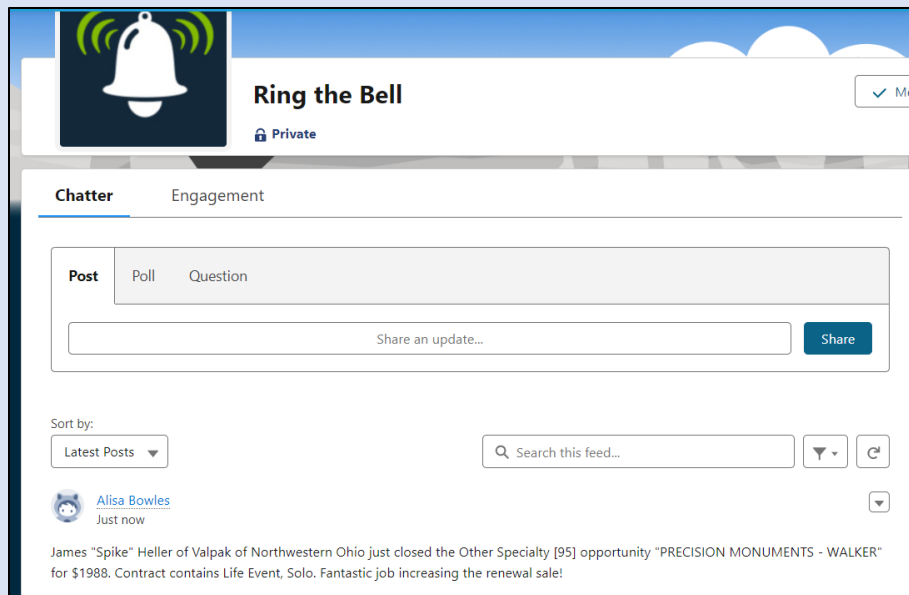
Numbered callouts: 1 points to the user profile menu, 2 points to the "Email Notifications" settings link, and 3 points to the "Email Notifications" link in the left sidebar.

To change the amount of Chatter emails you receive, Under your settings, go to Chatter, Email Notifications. Here you can choose how often you want to receive chatter notifications.

**For Spark, make sure you receive these emails DAILY**

# CHATTER GROUPS

Salesforce Chatter is a real-time social collaboration application that lets employees talk to each other, share information and work together.



**RING THE BELL** – “Ring the Bell” is a group that gives visibility to sales as they happen in the network. As a sale is converted to closed/won in Salesforce, a notification is triggered in the group, showing sales information such as sales rep name, franchise office, business name and category. This group gives our sales reps the recognition they deserve as well as provides the opportunity for other reps to ask questions and gain sales strategy intel.

**SPARK** – This is our daily communication to everyone in the network. Welcome to The Spark! A forum to ignite ideas, thoughts and actions!

# EINSTEIN SEARCH (Global Search)

Salesforce has an artificial intelligence called Einstein that learns your search behaviors. Clicking on the search box displays the most recently touched records and tips from Einstein. As you continue to use Salesforce the searching becomes more intuitive.

1. Begin your search by typing in the search box.
2. Hovering over the search results displays the basic record information, related record information, and action buttons.
3. Hovering over the related links displays information from the related records.

The screenshot illustrates the Salesforce Einstein Search interface. At the top, a search bar contains the text "PETE" with a blue arrow labeled "1" pointing to it. Below the search bar, a list of search results is displayed, including "PETE'S RESTAURANT & BREWHOUSE FOLSOM" for accounts, opportunities, and contacts. A blue arrow labeled "2" points to the "Pete Anderson" lead record in the list. To the right of the search results, a detailed view of the "Pete Anderson" lead is shown, including fields like Company (Woodland Direct), Title (Director of Special Proj...), Phone (248-838-1301), Email (pete.anderson@woodla...), and Lead Status (Qualified). A blue arrow labeled "3" points to the "Related List Quick Links" section, which includes links for "Launch Campaigns (0)", "Campaign History (4)", "Lead History (10+)", "Lead Owner Statistics (5)", "Notes (0)", "Files (0)", "Status History (4)", and "Cases (0)".

# EINSTEIN SEARCH (Global Search)

The screenshot shows the Valpak Einstein Search interface. At the top, there is a search bar with the text "PETE" and a blue arrow labeled "1" pointing to it. Below the search bar is a navigation menu with various options like Franchise Sales, Home, Reports, etc. On the left side, there is a "Search Results" sidebar with a list of record types and their counts. A blue arrow labeled "2" points to the "Leads" category. The main content area shows search results for "PETE". At the top of this area, it says "We searched for 'PETE'." Below that, there are two sections: "Leads" and "Accounts". The "Leads" section has a blue arrow labeled "3" pointing to a "View More" link. The "Leads" table has columns: Na..., Company, Title, Phone, Email, Lea..., Ow..., Last..., and a dropdown arrow. The "Accounts" section also has a "View More" link. The "Accounts" table has columns: Account Name, Franchise, Type, Account S..., Franchise's St..., Account Owner..., Accou..., and Phone. At the bottom of the page, there is a footer with various links like "Recent Items", "Help and Support", "Daily Dashboards & Reports", etc.

**Search Results**

**Top Results**

- Pete Kates (5+)
- Leads (5+)
- Accounts (5+)
- Contacts (5+)
- VPO Orders (5+)
- Opportunities (5+)
- Cases (5+)
- Chargent Orders (5+)
- Approvals (2)
- Access Request (5+)
- Quotes (5+)
- Agreements (5+)
- Orders (5+)
- Payment Requests (5+)
- Sales Line Header (5+)
- Files (5+)
- Distribution Versions (5+)
- Transactions (5+)

**Leads**  
5+ Results • Sorted by Relevance

Na...	Company	Title	Phone	Email	Lea...	Ow...	Last...
Pete Kates	Giordano's-St. Charles	Owner	(630) 762-1600	peterkates@yahoo.com	Qualified	DNIVEN	12/5/2023 2:14 PM
Manny/ Nancy/ Unkno...	Pete Mitchell's Bar & Grill		779-324-5119		Attempt 4	MCzaja	12/5/2023 5:30 PM
Duoc Thach	Saint Pete Nail & Lash		(727) 202-6838	hieneusang31@gmail.com	Attempt 3	VRoss	12/11/2023 2:33 PM
Pete unknown	FTD Auto - Bartlett		630) 855-5234	pete@ftdauto.com	Contacted	CMankoff	9/11/2023 2:06 PM
Pete Rodriguez	DISTRICT BREW YARDS		(224) 676-0075	pete@burntcitybrewing.com	Open	CMankoff	10/25/2023 12:50 PM

**Accounts**  
5+ Results • Sorted by Relevance

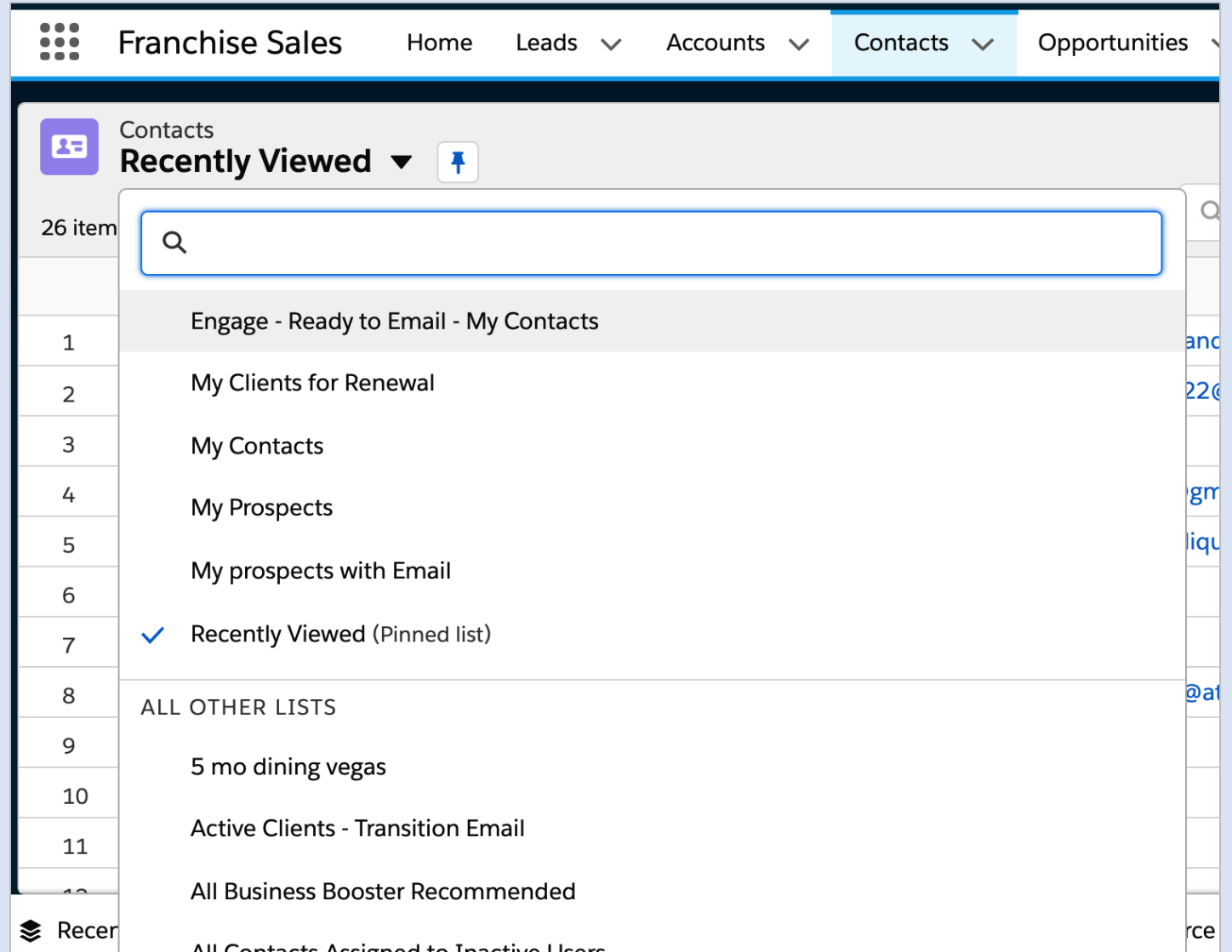
Account Name	Franchise	Type	Account S...	Franchise's St...	Account Owner...	Accou...	Phone
FAIRGROUNDS ST. PETE	Valpak of Tampa Bay	Client	Active Business	Owned & Operated	BArmendi	326109093	(727) 379-4033
PETE'S PIZZA	Valpak of Chicagoland	Client	Active Business	Owned & Operated	SSiman	315916484	(773) 801-1600
PETE'S RESTAURANT & BREWHOUSE FOLSOM	Valpak of Greater Sacramento	Client	Active Business	Owned & Operated	MBloom	389801498	(916) 988-8812
FAJITA PETE'S	Valpak of Greater Kansas City	Client	Active Business	Owned & Operated	LPARRISH	350509364	(913) 361-7700
PETE'S RESTAURANT & BREWHOUSE EDH	Valpak of Greater Sacramento	Client	Active Business	Owned & Operated	CCook	389802235	(916) 693-6111

Recent Items ? Help and Support ★ Daily Dashboards & Reports ★ Daily List Views ⚡ CPQ Help Links ⚡ Payment Help Links ⚡ Salesforce Help Links 📁 Sales Tools 📁 Recent Enhancements 📁 To Do List

Start typing and hit enter to pull an organized list of records that contain your search word. You can also select a specific record type if you are looking for a specific record. You can click view more so that you can see all associated records.

# WHAT ARE LIST VIEWS?

A list view is a **filtered list of records** where you can view records for one object at a time. For example, a list of Contacts, Accounts, or Opportunities.



The screenshot displays a CRM interface for 'Franchise Sales'. The top navigation bar includes 'Home', 'Leads', 'Accounts', 'Contacts', and 'Opportunities'. The 'Contacts' section is active, showing a 'Recently Viewed' list. A search bar is present above the list. The list contains 26 items, with the following visible entries:

Item Number	List Name
1	Engage - Ready to Email - My Contacts
2	My Clients for Renewal
3	My Contacts
4	My Prospects
5	My prospects with Email
6	Recently Viewed (Pinned list)
8	ALL OTHER LISTS
9	5 mo dining vegas
10	Active Clients - Transition Email
11	All Business Booster Recommended
12	All Contacts Assigned to Inactive Users

# QUICKLY IDENTIFY LIST VIEWS


The lists you should be touching everyday


Lists reps commonly ask for


Hot lists typically resulting from a special corporate initiative


 My Leads Due Today

 My Open Leads Scoring Over 40

 My Leads - Open Status

 My Leads not touched >60 days

 My Neighborly Leads

 My New Business Leads



# LIST VIEWS TO USE DAILY



Leads



**My Leads Due Today**



Leads



**My Active Funded Leads**



Leads



**My Open Leads Behavior Score Over 40**



Tasks



**My Tasks Due This Week**



Contacts



**My Active Clients**



Contacts



**My Clients to Renew - 6 Months**

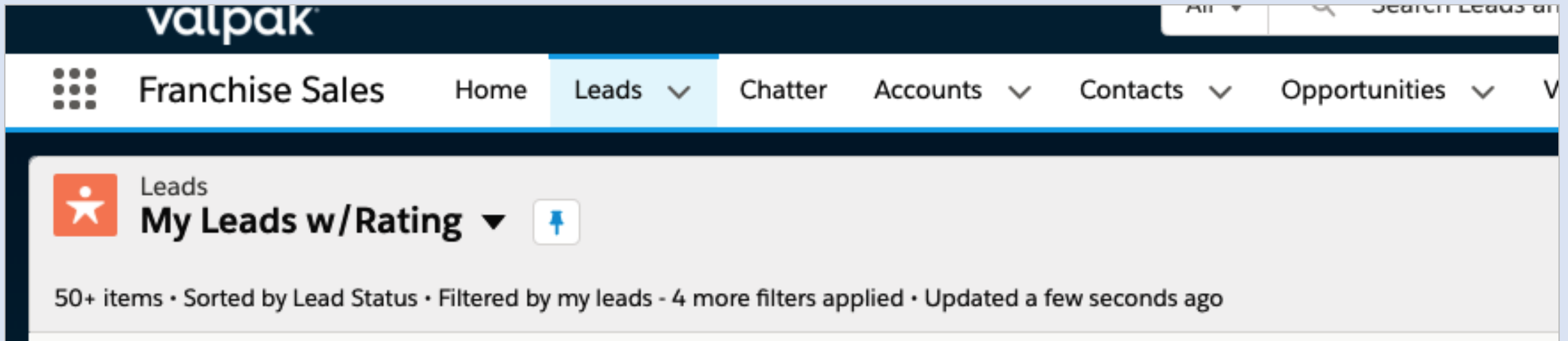


Contacts



**My Prospects - Not Touched > 60 Days**

# PIN A LIST VIEWS



1. Select the **list view drop-down** to locate your favorite list view.
2. Push the **pin** to store that list view to display every time you click on that tab.

<b>Tasks</b>	My Tasks Due Today -or- My Tasks Due This Week
<b>Leads</b>	My Leads Due Today
<b>Contacts</b>	My 6 Month Reactivation Clients -or- My Prospects Not Touched > 60 Days
<b>Cases</b>	My Active Cases – Owned & Requestor
<b>Quotes</b>	My Quotes in Client Review

# SEARCH LIST VIEWS

The screenshot shows the Valpak Leads interface. At the top, there is a search bar with a red 'X' over it. Below the search bar is a navigation menu with options like Franchise Sales, Home, Reports, Access Request, UserStaffs, User Defaults, Leads, Accounts, and More. The main content area shows a list of leads under the heading 'Leads Recently Viewed'. A search window is open over the list, with a green arrow pointing to it. A tooltip is displayed over the search window, stating: 'Last Modified Date and Owner Alias aren't searchable. Use filters or sort on these fields instead.'

	Name	Company	Title	Phone		Ow...	Last Modifie...
1	unknown	Culpepper Steak House		972-771-1001		ZHobbs	1/11/2022 3:39 P...
2	MATHIS CUMMINGS	InsideOut		(214) 998-7323	progress17@outlook.com	en	TNguyen 1/11/2022 3:39 P...

## Common search criteria:

- Email
- Zip Code
- Contact Name
- Company Name

*The search window displays a pop-out window describing which fields are not searchable for the list.*

# CHOOSE YOUR VIEW – Option 1

Tasks  
Recently Viewed

50+ items • Updated a few seconds ago

Search this list...

New Task

Table

	Subject	Name	Related To	Due Date	Assigned Alias
1	call greg	Greg Laswell		11/5/2021	KMURRAY
2	Call Donna Stressing Steren Management	Donna Stresing		12/20/2021	CBalestr
3	Called. Setting a task for Corri	Donna Stresing		12/16/2021	LGolbber
4	Call	Donna Stresing		12/16/2021	LGolbber
5	Called - Not In	Mary Armbruster		10/12/2021	ABUCHMAN
6	Call	Mary Armbruster		10/12/2021	ABUCHMAN
7	Called - Closed	Mary Armbruster		10/11/2021	ABUCHMAN
8	Called	Richard Lombardi		11/23/2021	LGolbber
9	Call	Richard Lombardi		11/11/2021	LGolbber
10	Call	Richard Lombardi		10/7/2021	JCastill
11	Call	Richard Lombardi		10/1/2021	JCastill
12	Call	Richard Lombardi		9/8/2021	JCastill
13	Call	Richard Lombardi		8/13/2021	JCastill
14	Email: CHeck these out!	Richard Lombardi		8/3/2021	JCastill
15	Call	Richard Lombardi		8/3/2021	JCastill
16	Call	Andrew Jacobsen		11/30/2021	RMaas
17	Call	Andrew Jacobsen		11/17/2021	RMaas
18	Call	Andrew Jacobsen		11/16/2021	RMaas
19	Call	Andrew Jacobsen		9/28/2021	RMaas
20	Call	Andrew Jacobsen		9/28/2021	RMaas
21	Call Blitz 3/17	Andrew Jacobsen		3/17/2021	RMaas
22	Call	Andrew Jacobsen		1/13/2021	RMaas

Select list display

- ✓ Table
- Kanban
- Split View

# CHOOSE YOUR VIEW – Option 2

Split View

The screenshot displays a CRM interface in a split view. On the left, a list titled 'Recently Viewed' shows a list of tasks. On the right, the details for a specific task 'call greg' are shown. A 'Select list display' menu is overlaid on the right side, showing three options: 'Table', 'Kanban', and 'Split View', with 'Split View' selected.

**Recently Viewed**

50+ items • Updated 11 minutes ago

Search this list...

Task Name	Assigned To	Date
call greg	Greg Laswell	11/5/2021
Call Donna Stressing Steren Management	Donna Stresing	12/20/2021
Called. Setting a task for Corri	Donna Stresing	12/16/2021
Call	Donna Stresing	12/16/2021
Called - Not In	Mary Armbruster	10/12/2021
Call	Mary Armbruster	10/12/2021
Called - Closed	Mary Armbruster	10/11/2021
Called	Richard Lombardi	11/23/2021
Call	Richard Lombardi	11/11/2021
Call	Richard Lombardi	10/7/2021
Call	Richard Lombardi	

**Task call greg**

+ Follow | **Completed** | Edit Comments | Change Date | Change Status

Name	Related To	Status	Type	Reminder Set	Decision-Maker
<a href="#">Greg Laswell</a>		Completed	Call	<input type="checkbox"/>	<input type="checkbox"/>

**Details** | Related | Chatter

**Task Information**

Subject	call greg	Due Date	11/5/2021
Name	<a href="#">Greg Laswell</a>	Assigned To	<a href="#">Karen Murray - Inactive</a>
Company Name	Wing Zone	Type	Call
Phone	859-308-1013	Franchise Short Name	Lexington
Email		Reminder Set	No reminder is set
Related To		Create Recurring Series of Tasks	<input type="checkbox"/>
Comments		Decision-Maker	<input type="checkbox"/>

**Additional Information**

Status	Completed	Lead Data Load ID	12450029926862
Priority	Normal	Account Data Load ID	

**Select list display**

- Table
- Kanban
- Split View

# CHOOSE YOUR VIEW – Option 3

Kanban

Tasks Recently Viewed

55 items • Updated a few seconds ago

Search this list...

New Task

Not Started (1) In Progress (1) Completed (53) Waiting on someone else (0) Deferred (0)

Call back Leon's bbq  
Leon Davis  
11/19/2021

Call Donna Stressing Steren Managem...  
Donna Stresing  
12/20/2021

call greg  
Greg Laswell  
11/5/2021

Called. Setting a task for Corri  
Donna Stresing  
12/16/2021

Call  
Donna Stresing  
12/16/2021

Called - Not In  
Mary Ambruster  
10/12/2021

Call  
Mary Ambruster  
10/12/2021

Called - Closed  
Mary Ambruster  
10/11/2021

Called  
Richard Lombardi

## Select list display

Table



✓ Kanban



Split View



# **INTRO TO LEADS**

# WHERE DO LEADS COME FROM?

## Self-Generated = YOU

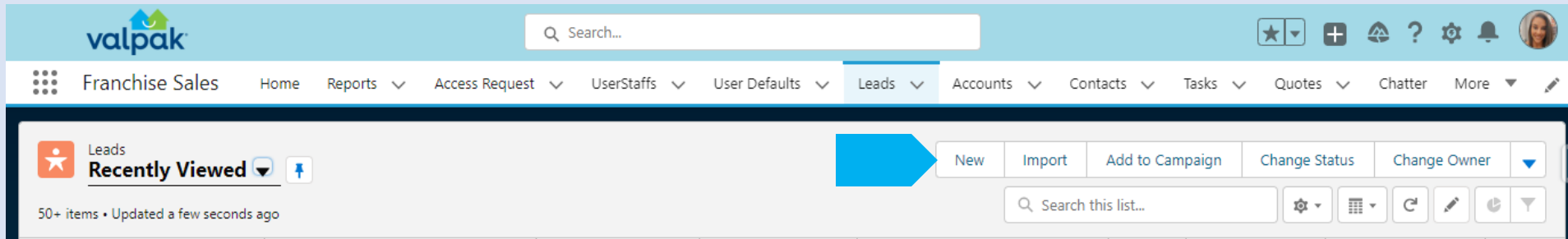
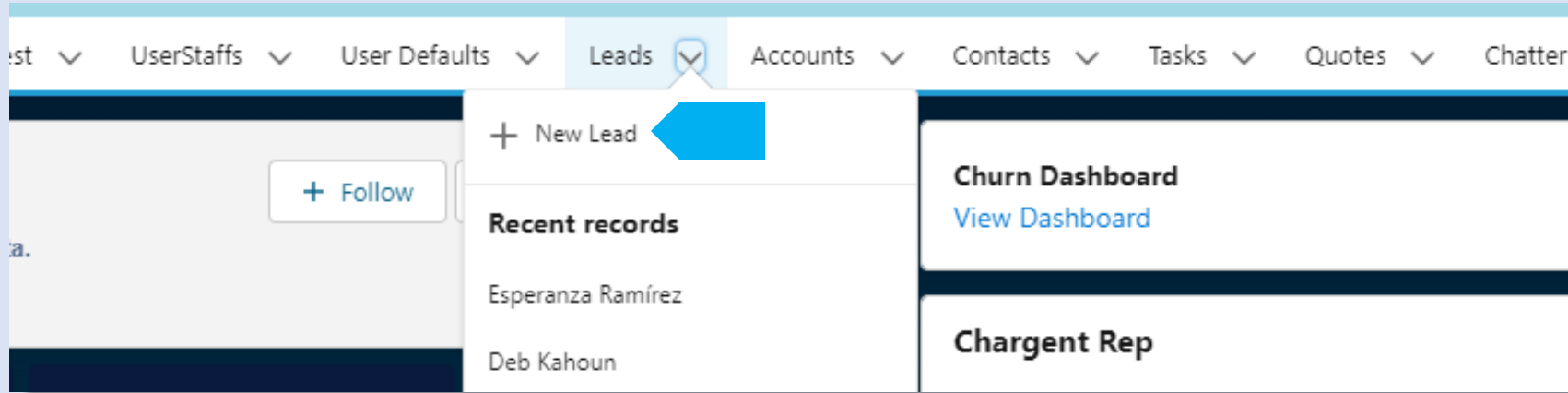
1. Canvassing your Territory
2. Prospect-Finder app
3. AdMall

## Online Marketing Efforts

1. Franchise Home Page form fills
2. Google Ad Word searches/form fills
3. Insert Program
4. Other marketing efforts



# CREATE A LEAD



# NEW LEAD FORM

\* = Required Information

### Lead Information

Lead Owner  
Katherine Edwards

\* Name  
Salutation: --None--  
First Name: First Name  
\* Last Name: Last Name

Phone: [Text Field] [Red X Icon]

Do Not Call:

Title: [Text Field] Mobile: [Text Field]

\* Company: [Text Field] Email: [Text Field]

\* Lead Status: Open  
Next Due Date: [Calendar Icon] Email Opt Out:

Website: [Text Field]

\* Lead Source: --None-- Fax: [Text Field] [Red X Icon]

Referred By: [Text Field] No. Prom: [Text Field]

\* Category: --None--  
[View all dependencies](#)

Last Email Sent Date  
Date: [Calendar Icon] Time: [Time Picker] [Red X Icon]

Sub Category: --None--  
[View all dependencies](#)

Franchise: Search Accounts... [Search Icon]

NAIC: Search NAICs... [Search Icon]

SMS Text Opt Out:

### Address Information

Address Primary NTA  
Search Address [Search Icon]

Street: [Text Field]

City: [Text Field] State/Province: [Text Field]

Zip/Postal Code: [Text Field] Country: [Text Field]

### Additional Information

Description: [Text Field]

Buttons: Cancel Save & New Save

# NEW LEAD FORM – TIPS!

- Note that all fields with a red asterisk are required fields.
- If you don't have a First Name, leave it blank. **If you don't have a Last Name enter Unknown.** Do not enter N/A, Don't Know, or other text in the name field.
- You will need to add a Franchise based off the Business' physical location.
- Optional fields you should fill in:
  - Phone
  - NAIC
  - Address
  - Email

\* Company

\* Lead Status  
Open ▼

First Name

\* Last Name

Franchise

Address

Street

City  State/Province

Zip/Postal Code  Country

Phone

NAIC ⓘ

# PROSPECT FINDER


# WHAT IS PROSPECT FINDER?

- A business-to-business application for locating and downloading business listings from combined data sources managed by Valpak home office.
- Search, select, and transfer data from Prospect Finder directly into Salesforce.
- NOTE: We remove Prospect Finder Leads with no Activity in the last 90 days.

The screenshot displays the Valpak Prospect Finder web application. The interface includes a search bar at the top, a navigation menu with options like Franchise Sales, Home, Reports, and Prospect Finder, and a main search area. The search area is divided into sections for 'Select Business Type' (with Category and Sub-Category dropdowns) and 'Select Geography' (with Search Address, Search Zip Code, and Radius fields). A 'Find Businesses' button is located below the search fields. The results section shows '84 Prospects Found' and lists details for two prospects: 'Cody's Original Roadhouse' and 'Thai Wok Restaurant'. Each prospect entry includes fields for Name, Phone, Street, Address, Category, and Sub-Category. The interface also features a 'Select All' checkbox, an 'Add to My Leads' button, and pagination controls.

**WORKING LEADS**

# LEAD PROCESS

 **Lead**  
**Gorgeous in Minutes**

[+ Follow](#) [Launch](#) [Convert](#) [Edit](#) [New Note](#) [Send Engage Email](#)

Name	Phone (2) ▼	Email	Lead Source	Category	Sub Category
Shasha Lee	941-268-0899	<a href="mailto:gorgeousbysl@gmail.com">gorgeousbysl@gmail.com</a>	SEM - AdWords	Health / Beauty / Fitness [5]	Hair Salons [51]

[Launch Campaigns \(0\)](#) [Campaign History \(7\)](#) [Lead History \(10+\)](#) [Lead Owner Statistics \(4\)](#) [Notes \(0\)](#) [Files \(0\)](#) [Status History \(4\)](#) [Cases \(0\)](#)

▼ **Open** Attempt 1 Attempt 2 Attempt 3 Attempt 4 Attempt 5 Attempt 6 Attempt 7 Attempt 8 Contacted Parking Lot Not Quali... Invalid Converted [Mark Status as Complete](#)

# WHAT IS AN “ATTEMPT”?

The screenshot displays a Salesforce lead record for 'Gorgeous in Minutes'. The lead's name is Shasha Lee, with a phone number of 941-268-0899 and an email address of gorgeousbysl@gmail.com. The lead source is SEM - AdWords, and the category is Health / Beauty / Fitness [5]. The sub-category is Hair Salons [51]. The record includes various action buttons such as '+ Follow', 'Launch', 'Convert', 'Edit', 'New Note', and 'Send Engage Email'. Below the lead details, there are links to 'Launch Campaigns (0)', 'Campaign History (7)', 'Lead History (10+)', 'Lead Owner Statistics (4)', 'Notes (0)', 'Files (0)', 'Status History (4)', and 'Cases (0)'. At the bottom, a yellow progress bar shows the lead's status history: Open, Attempt 1, Attempt 2, Attempt 3, Attempt 4, Attempt 5, Attempt 6, Attempt 7, Attempt 8, Contacted, Parking Lot, Not Quali..., Invalid, and Converted. A 'Mark Status as Complete' button is also visible.

Inside Salesforce, we’ve built logic behind each **prospecting call attempt**. You don’t have to set a reminder on your phone, write it on a sticky note, or think about it until you go to your “My Leads Due Today” List View the next day.

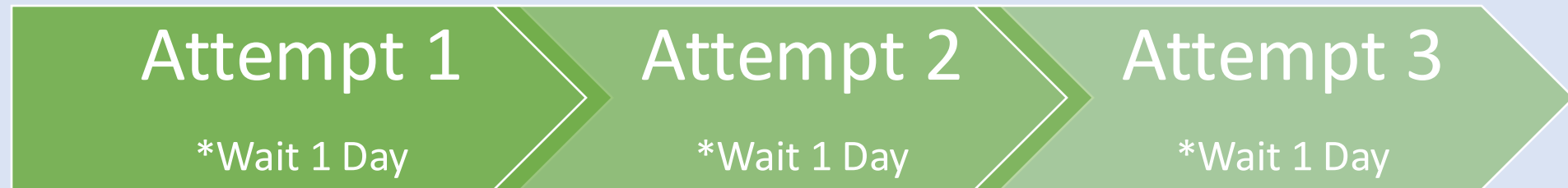


# THE ATTEMPT PROCESS

**GREEN ATTEMPT**

=

Automatically  
updates the due  
date



You don't have to set a task, write it on a sticky note, or think about it until you go to your list view "My Leads Due Today" the next day. The same thing happens with Attempt 2 & 3.

# THE ATTEMPT PROCESS

**GREEN ATTEMPT**

=

Automatically updates the due date



**At attempt 4**, the wait time in between calls extends to 4 days – and keeps extending as you make more attempts. Each time you move to the next attempt it is automatically removed from your My Leads Due Today list and is set to show back up after the designated wait time.

**At attempt 5 & 6**, the wait time in between calls extends to 7 days.

# THE ATTEMPT PROCESS

## GREEN ATTEMPT

=

Automatically updates the due date



## BLUE =

You will decide next steps

**At attempt 7**, the wait time in between calls extends to 9 days.

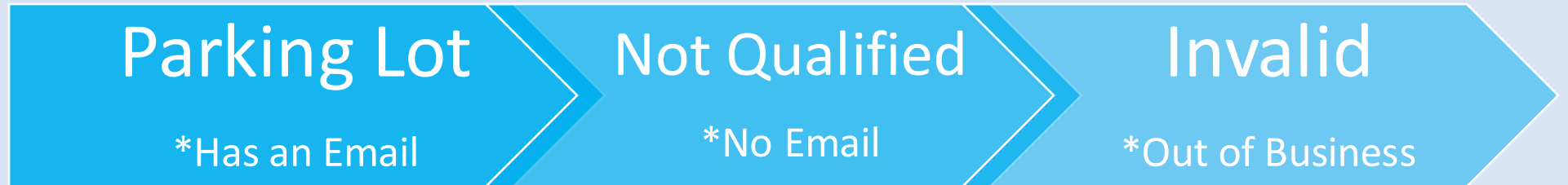
**At attempt 8**, the wait time in between calls extends to 15 days.

**Contacted** – You finally got the someone on the phone, or they replied to you email. However, they say now is not a good time and want you to call back on Friday after 2pm. Mark your Attempt as Contacted and create a task to call them back on the date and time requested.

# THE ATTEMPT PROCESS

**BLUE =**

You will decide  
next steps



**Parking Lot vs. Not Qualified**– The client tells you no. At Valpak, we take no as “no for now”. So how do you determine if they go into the Parking Lot or as Not Qualified. It’s easy. Do you have an email address on the Lead? If yes, put it in the Parking Lot. If no, put them in Not Qualified.

**Invalid** – You call the client, and their phone number is out of service. You take a drive to their location and see an OUT OF BUSINESS sign in the window. These Leads need to be marked as Invalid.

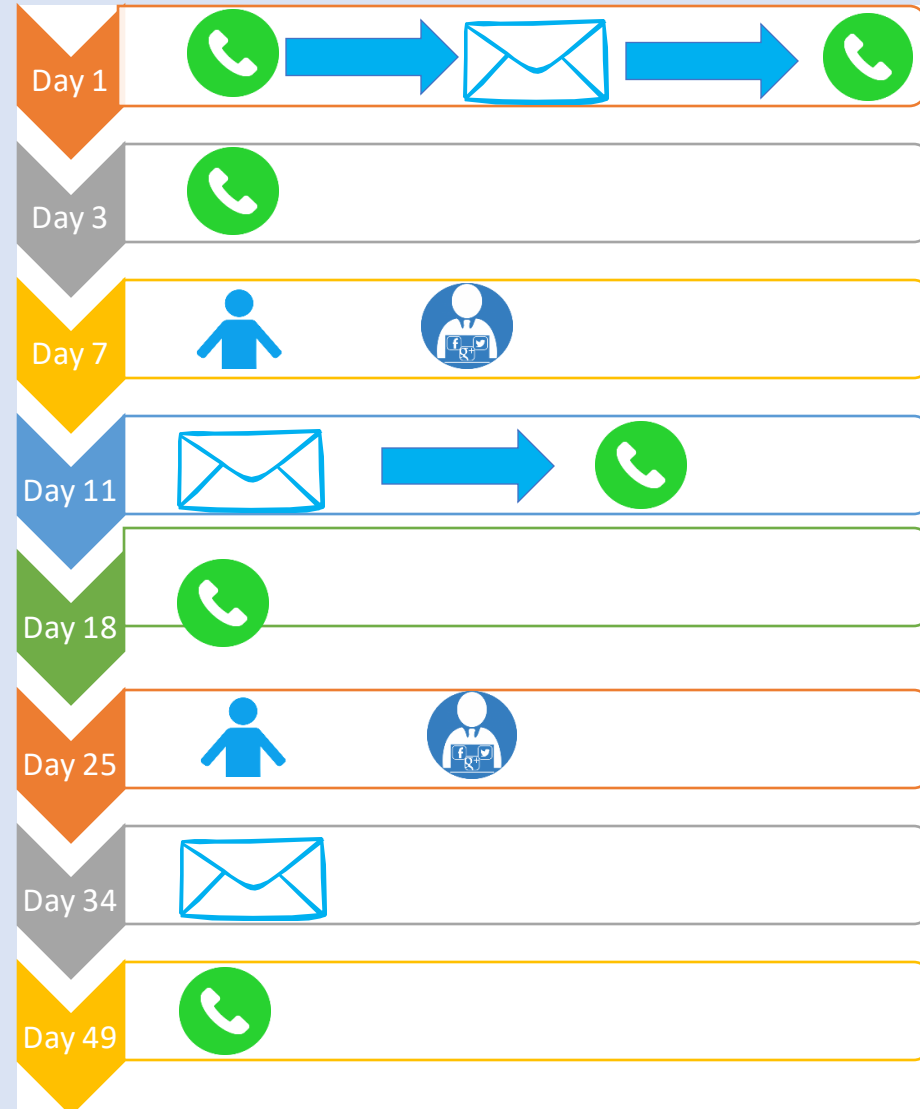
# 5 WAYS TO CONTACT LEADS/CONTACTS

1. In-Person
2. Phone
3. E-Mail
4. Text
5. Social Media
  - LinkedIn, Facebook, Instagram

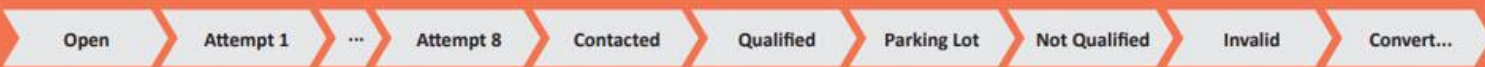




# MIX YOUR TOUCHES

By using a planned follow-up schedule and mixing up your contact approaches, you can increase the chances of getting to the decision maker and getting the appointment.



# LEAD PROCESS CHEAT SHEET

SALESFORCE LEAD PROCESS		
		
SCENARIO	ACTION	BENEFIT
<p><b>Call Lead: No Answer</b></p> <ul style="list-style-type: none"> <li>• Leave a voicemail</li> <li>• Status = Attempt 1-8</li> <li>• Activity – Log a Call</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Log a Call</li> <li><input checked="" type="checkbox"/> Move the Lead Status from the <b>current Attempt to the next Attempt.</b></li> </ul> 	<p>This removes the Lead from the Leads Due Today list and automatically updates the due date to a future date, so the Lead reappears on the list in a few days.</p>
<p><b>Call Lead: Objection</b></p> <ul style="list-style-type: none"> <li>• Status = Contacted</li> <li>• Activity – New Task</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> New Task</li> <li><input checked="" type="checkbox"/> Move the Lead Status from the <b>current Attempt to Contacted.</b></li> </ul> 	<p>Moving the Lead to Contacted removes the Lead from your cold call list (My Leads Due Today). You will now be able to tell the system when you want to be reminded to follow up with the Lead. Plan your next step based on the prospect’s feedback.</p>

# SCENARIO – CALL – NO ANSWER



- Leave a voicemail
- Status = **Attempt 1-8**
- Activity = **Log a Call**



# SCENARIO – CALL - OBJECTION



- Status = **Contacted**
- Activity = **New Task**
  - Set a task to reach back out to them at a later date. (a week or 2 in the future.)

# SCENARIO – CALL – “CALL ME NEXT WEEK”



- Status = **Contacted**
- Activity = **New Task**
  - Should be set for some time next week to remind you to call them back.

# SCENARIO – CALL – “YES, LETS MEET TOMORROW”



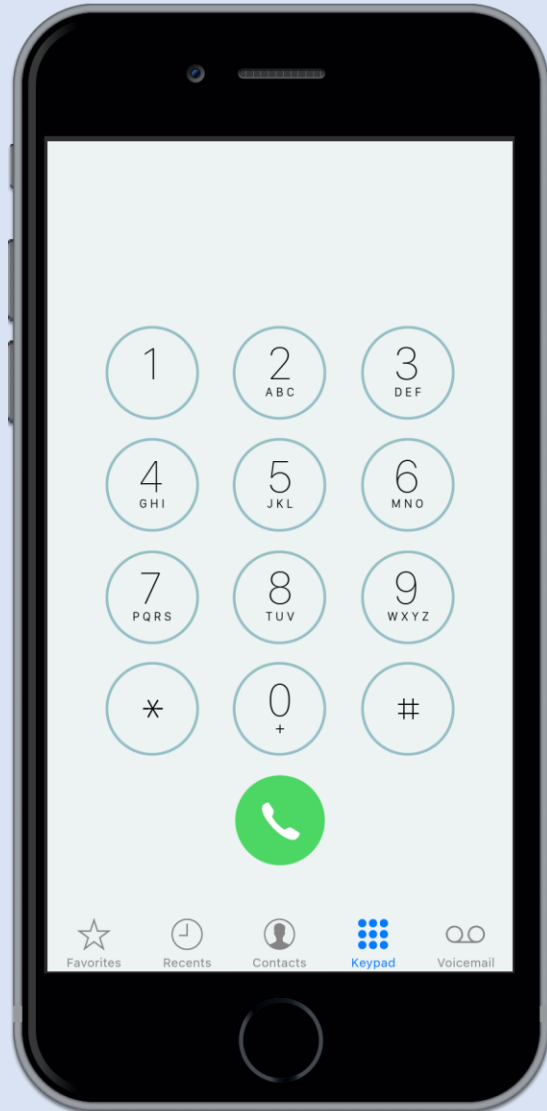
- Activity = New Event
- Convert the Lead to Prospect Account.

# SCENARIO – CALL – GET THE BOOT



- Lead has email:
  - Status = **Parking Lot**
- Lead does not have email:
  - Status = **Not Qualified**
- Activity = **Log a Call**

# SCENARIO – Call – OUT OF BUSINESS/SERVICE



- Status = Invalid
- Activity = Log a Call

# Task/Event Entry

# LOGGING ACTIVITY

Activity	Where to Log	Type Choices
Log a Call	Leads & Contacts Preferred	Call
New Task	Leads, Contacts, Opportunities Preferred or Accounts	Call, Follow-Up, Send Quote, Email
New Event	Leads & Contacts Preferred. Opportunity O.K.	Appt, Non-Sales, Production, Prospecting
Engage	Leads & Contacts only	N/A

# ACTIVITY TIPS

In **Subject** - Enter enough information that will help you remember the outcome of that touch. Leave any additional notes in the **Comment** section.

“Stopped by with ad samples”

“Called but he’s on vacation - back on Monday”

“Come back with auto repair success stories”

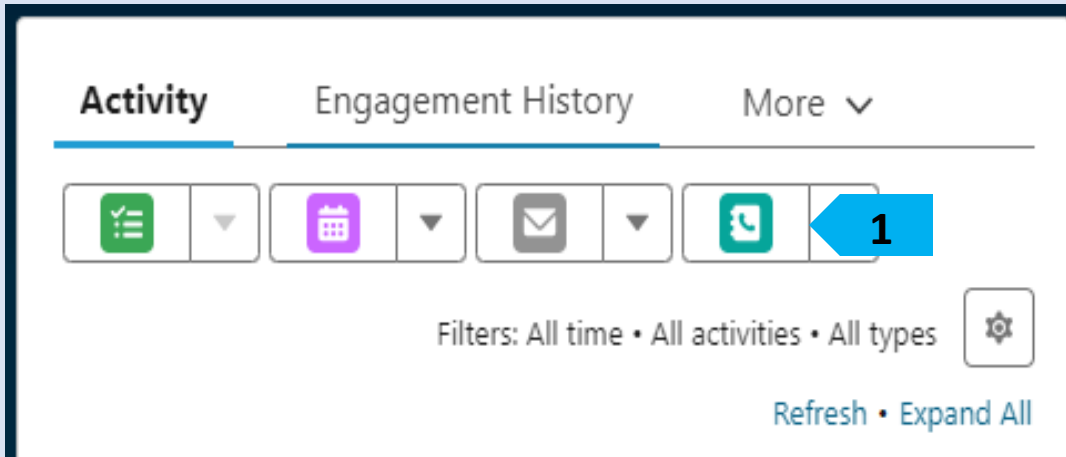
“Called and Jane said look for his red truck on Weds”

The screenshot shows a CRM interface for a 'Call' activity. The form is titled 'Call' and has a search icon in the top right corner. The 'Subject' field contains the text 'Call'. The 'Comments' field is empty. The 'Type' field is a dropdown menu with 'Call' selected. The 'Related To' field is a dropdown menu with a search icon and the text 'Search Accounts...'. The 'Name' field is a dropdown menu with 'Katie's Test Lead' selected. The 'Decision-Maker' field is a checkbox that is unchecked.



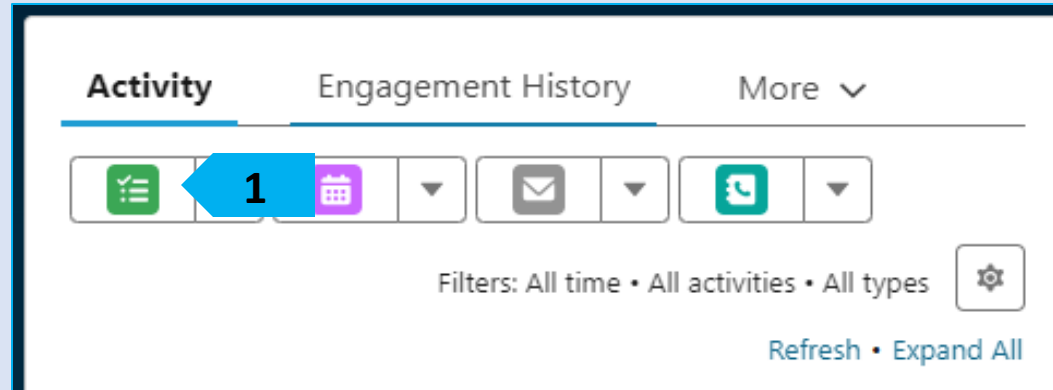
# LOG A CALL

- \*When you log a call, it will have a prefilled choice of Call as the subject. Best practice is to put enough information that will help you remember the outcome of that touch. If you reached their VM, the
- \*Subject could read: Called and Left Cliff a voicemail. If you stopped by your Subject could read: Stopped by. Reception said to look for the red truck outside on Wednesdays.
- \*Leave any additional notes in the Comment section.
- \***Type** – Choose one of the following: Call or Email
- \*Then Save.



A screenshot of the 'Call' form in a CRM system. The form has a title bar with a telephone handset icon and the word 'Call'. Below the title bar are several fields: 'Subject' with a search box containing 'Call', 'Comments' with a text area, '\*Type' with a dropdown menu set to 'Call', 'Related To' with a search box containing 'Search Accounts...', 'Name' with a dropdown menu set to 'Katie's Test Lead', and 'Decision-Maker' with a checkbox. At the bottom right, there is a blue arrow labeled '2' pointing to a 'Save' button.

# NEW TASK



Subject

\*Type  
--None--

Due Date

Name  
Katie's Test Lead

Related To  
Search Accounts...

\*Assigned To  
Katie Melech

\*Status  
Not Started

Reminder Set

Date  
12/12/2023

Time  
11:00 AM

2 Save

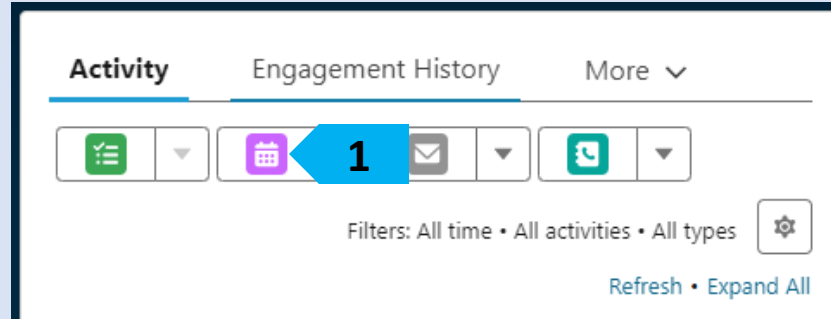
BE SPECIFIC in your subject lines – give yourself memory joggers, because if the task is far enough in the future, you certainly won't remember the details of the original call. The subject field can hold several lines of text, so it doesn't hurt to give yourself details.

Select a Type.

DO NOT FORGET the Due Date – Salesforce isn't a mind reader. It can't remind you to do something in the future if you don't tell it when to remind you!

If you don't like the little pop offs remembers, you can control when they appear – 8 a.m., noon, etc. or turn them off entirely.

# NEW EVENT



1. **Subject** – The subject line defaults to MEETING. Make sure you change this to something relevant like who you are meeting, where you are meeting, and what you are meeting about. Again, be specific – this will help you quickly prepare the day of the meeting.

2. **Type** - You must give it a type (9 times out of 10 it's appt)

3. **Start** – Set your Start and End Date/Time

4. **Location** – If you are meeting at the local Starbucks, you may want to enter the address here.

5. **People** – Maybe your manager wants to come with you on your 1<sup>st</sup> meeting. You can add them to the Event. You can also add the client here as well.

# GOOD vs BAD SUBJECT LINES

The screenshot displays two panels: 'Today's Tasks' on the left and 'Today's Events' on the right. In the 'Today's Tasks' panel, a green box highlights two tasks with clear, specific subject lines: 'Call Greg Todd back - dont forget to ask about ...' (with a link to 'Greg Todd') and 'FU with Paula and drop off Map & Schedule' (with a link to 'Paula Person'). A red box highlights two tasks with vague subject lines: 'Follow UP' (with a link to 'Valerie Jonas') and 'FU Call' (with a link to 'Lena Testing'). The 'Today's Events' panel shows a green box highlighting two events with clear subject lines: 'Meeting with Greg Todd @ Dunedin Dunkin Donuts...' and 'Meet with Paula @ Superkicks for Discovery'. A red box highlights two events with vague subject lines: 'Meeting' and 'meeting'. Both panels have a 'View All' link at the bottom.

**Today's Tasks**

- Call Greg Todd back - dont forget to ask about ... Today  
[Greg Todd](#)
- FU with Paula and drop off Map & Schedule Today  
[Paula Person](#)
- Follow UP Today  
[Valerie Jonas](#)
- FU Call Today  
[Lena Testing](#)

[View All](#)

**Today's Events**

Now [New Sales Rep Orientation](#)  
TBD  
5/5/2018 12:00 AM

- 10:30 AM [Meeting with Greg Todd @ Dunedin Dunkin Donuts...](#)  
1st Appt  
5/2/2018 11:30 AM
- 11:00 AM [Meet with Paula @ Superkicks for Discovery](#)  
1st Appt  
5/2/2018 11:30 AM
- 12:00 PM [Meeting](#)  
1st Appt  
5/2/2018 12:30 PM
- 12:30 PM [meeting](#)  
1st Appt  
5/2/2018 1:30 PM

[View Calendar](#)

# Managing Task

# TASKS HOME PAGE

You can view your Task and Today's Events on the Home Page. You can also change the Task that appear on the Home Page by clicking on the drop down next to My Task.

The screenshot displays the Valpak Home Page interface. At the top, there is a search bar and a navigation menu with options: Franchise Sales, Home, Contacts, Leads, Accounts, Opportunities, VPO Orders, Cases, Dashboards, and Quotes. Below the navigation, there are four report links: "View Report (Quotes in Manager Revi...", "View Report (Quotes in Client Review...", "View Report (Quotes Waiting for Cou...", and "View Report (Activities Created Today...".

The "Key Links" section features five icons with labels: Prospect Finder (pencil icon), Blue Vue (blue icon with a white symbol), Valpak University (book icon), Engage Alerts (two people icon), and Calendar (calendar icon).

The "My Tasks" section includes a list of tasks with checkboxes and due dates:

- Update Account Missing Fields Apr 14 |  
AXIOM RENOVATIONS
- Launch Order No due date  
MOSQUITO JOE - COASTAL GEORGIA
- call Composite guys No due date  
Todd August
- Launch Order No due date  
CHINA INN
- Launch Order No due date  
PARAMOUNT BUILDERS, INC.

A "View All" link is located at the bottom of the "My Tasks" section.

The "Today's Events" section lists upcoming appointments:

- Now Meeting call Mike Coffee 775-0079 lead va fence  
Appt  
[Virginia Fence Company-](#)  
4/18/2022 1:00 PM
- Now Meeting follow up with Gary Layne  
Appt  
4/18/2022 1:00 PM
- 1:00 PM call Bust a Bug Owen Little wood 500-2852  
Appt  
4/18/2022 2:00 PM
- 1:00 PM Meeting call doug abrams  
Appt  
4/18/2022 2:00 PM
- 2:30 PM call Pembroke  
4/18/2022 3:00 PM

A "View Calendar" link is located at the bottom of the "Today's Events" section.

# TASK RECORD

Task **Follow Up with Samples of similar business ads**

[+ Follow](#) [✓ Mark Complete](#) [Edit Comments](#) [Change Date](#) [Change Status](#)

Name	Related To	Status	Type	Reminder Set	Decision-Maker
<a href="#">Katie's Test Lead</a>		Not Started	Call	<input checked="" type="checkbox"/>	<input type="checkbox"/>

---

**Details** Related Chatter

Task Information

Subject	Due Date
Follow Up with Samples of similar business ads	6/4/2024
Name	Assigned To

---

Additional Information

Status	Lead Data Load ID
Not Started	
Priority	Account Data Load ID
Normal	

---

RingDNA Details

Conversation	Channel
--------------	---------

Make sure you are changing the status of your Task as needed.

Once you have completed the Task, click the Mark Completed button.

# HELP RESOURCES





# Questions?



[fast@valpak.com](mailto:fast@valpak.com)

800-825-7259

# ANNOUNCEMENTS

The image displays two overlapping screenshots of the Valpak CRM interface. The top screenshot shows the account details for 'Valpak of Tri County PA', including contact information and a 'Valpak Announcement' window. The bottom screenshot shows the 'Sales Owner/Manager Home Dashboard' with various metrics and a 'Salesforce Maintenance' announcement. A red arrow points from the video player in the announcement window to the maintenance banner in the dashboard.

**Account Details: Valpak of Tri County PA**

- Phone: (814) 299-9890
- Franchise Status: Owned & Operated
- Industry: Media
- Market Size: VP Small [VD]
- Sales Coach Assigned: Lisa Lawn
- FFC Assigned: Tom Erwin-Inactive

**Account Summary:** Contacts (1), Cases (10+), Jobs (10+), FranchiseNTAs (10+), Gateways (2), Notes (0)

**Account Details Table:**

Field	Value
Account Name	Valpak of Tri County PA
Account Ext ID	000004365
Type	Franchise
Franchise Status	Owned & Operated
Number of Active NTAs	11
Primary Contact	
Phone	(814) 299-9890
Email	tri_county_pa@valpak.com
Fax	
Region	

**Dashboard Metrics:**

- Quotes in Manager Review: 10
- Quotes in Client Review: 117
- Quotes Waiting for Counter...: 7
- Activities Created Today - All: 249

**Key Links:** Prospect Finder, Blue Vue, Valpak University, Engage Alerts, Calendar

**Today's Tasks:** [Empty]

**Today's Events:** [Empty]

**Announcement: CREATING CASE ENHANCEMENT:**

Take a moment to watch this quick video to see how creating a case has been made easier!

**Salesforce Maintenance:** Please note that there is a Salesforce Scheduled Maintenance taking place on Thursday February 24<sup>th</sup> from 9 AM - 10 AM. During this time you may experience delays on Salesforce data populating the VPO worklist. Thank you for your understanding.

**UNDER MAINTENANCE**

# **SALESFORCE 101**

## **WRAP UP**

# STAY ORGANIZED WITH SALESFORCE



Use the Daily List Views to guide your activity.



Enter new Leads daily.



Don't wait to log calls, stop ins, and conversations you've had. Do it right after the touch.



Use the Leads Process for Attempts 1-8, Contacted, ect.



Convert the Lead when you set the appointment.



Utilize cheat sheets, training videos, and other resources.



Email/Call FAST with questions or issues you have.

**NEXT STEPS**

# LOG INTO TRAIN

1. Go to **valpak--sftrain2.sandbox.my.salesforce.com** to log into the Training Sandbox.
2. Please reach out to FAST with any issues/questions.