Salesforce

Inbound Generalists

User Guide

designed by Rose Marie Johnson

Table of Contents

Welcome to Salesforce Training!

Overview of Salesforce

ABC® Insurance is pleased to launch Salesforce!

The purpose of this training is to explore the benefits and capabilities of Salesforce; understand why ABC® is implementing a robust lead management system that offers a wide-range of features and tools for call center management, marketing automation, partner marketing, and customer service and support; explore the functionalities and basic building blocks of Salesforce; and gain hands-on experience navigating the Salesforce environment and utilizing several tools specific to Inbound Generalists.

Salesforce is a web-based Customer Relationship Management (CRM) system that helps you better manage relationships and communications with ABC®'s current policyholders and potential customers.

Key benefits of Salesforce include:

- An accelerated sales cycle and positive change in selling behavior
- Increased collaboration between IBGs and sales leadership
- Integrated customer information silos with capability in housing complete customer profiles and account histories
- Tracking and reporting of opportunity-related information such as customer communications, forecasts, and milestones
- Better visibility into customer information, enabling IBGs to see all accounts, opportunities, and call-related events in a single repository
- Easy account management as IBGs can view customer histories, develop account strategies and action plans, and complete call events
- Generation of actionable analytics for Marketing and Sales leadership
- Ability to view email marketing campaigns (BPGs) created and managed by Marketing

Why Salesforce / Why Now?

With Salesforce, Inbound Generalists and Supervisors can fully own the sales cycle within a single, centralized area. Salesforce allows IBGs to generate quotes, schedule calls, follow up with call events, search, view, and update account information, and complete enrollment applications. It also allows Supervisors to view pipeline status, opportunities in progress, reports, projected daily, weekly, and monthly revenues, and performance of IBGs.

Learning Objectives

The overall goal of this training is to learn Salesforce's lead management features, tools, and processes. Upon successful completion, you will be able to:

- Navigate the Salesforce interface with confidence
- Identify the building blocks of Salesforce's objects such as Person Accounts, Pet Information, and Opportunities
- Demonstrate the ability to use the Sales Quoting Tool (SQT) to capture, save, and retrieve quotes
- Create calendar events and assign Call Results codes to scheduled events
- Answer, hold, transfer, and conference calls using the SoftPhone (CTI Adapter)
- Assign various types of Call Results when wrapping up calls
- View and update objects such as Person Accounts, Opportunities, Quote Summaries, Policies, and Activities
- Complete and submit enrollment applications
- View email campaigns created and managed by Marketing

Module 1: Navigating Salesforce

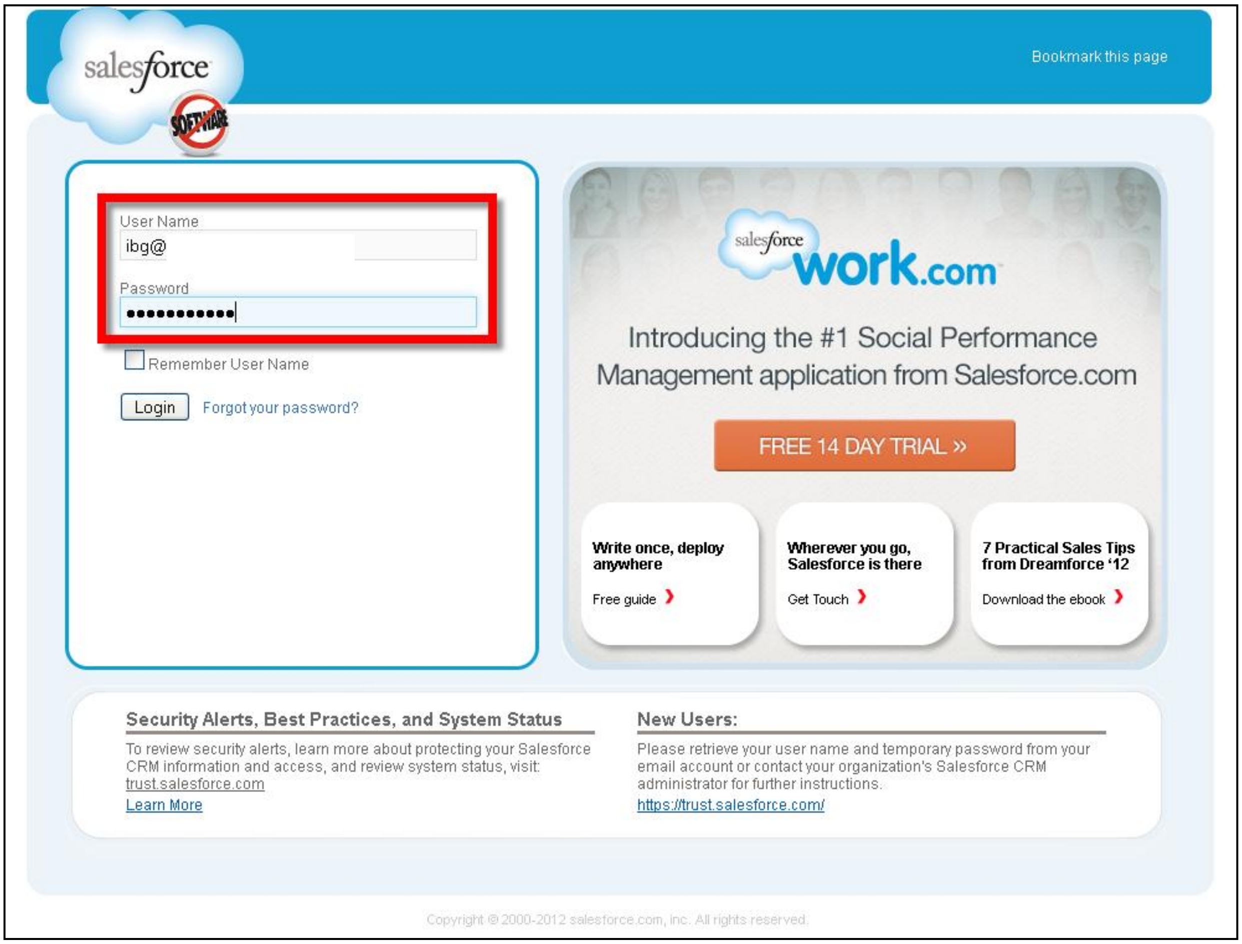
Upon successful completion of this module, you will be able to:

- ✓ Log into Salesforce
- ✓ Explore the Salesforce interface including header components, tabs, and fields
- ✓ Customize personal information settings
- ✓ Navigate the SoftPhone/CTI Adapter sidebar
- ✓ View and update existing person accounts
- ✓ Create Sales Credit Requests
- ✓ Navigate the Console and view its components
- ✓ Navigate the Sales Quoting Tool (SQT) at a high level
- ✓ Log out of Salesforce

Logging into Salesforce

The first step in accessing the Salesforce login screen is to launch Internet Explorer. There are several ways to open the browser. You can open the browser by clicking the shortcut on the Desktop, clicking the icon at bottom-left of the Task Bar, or by clicking Start>Programs>Internet Explorer.

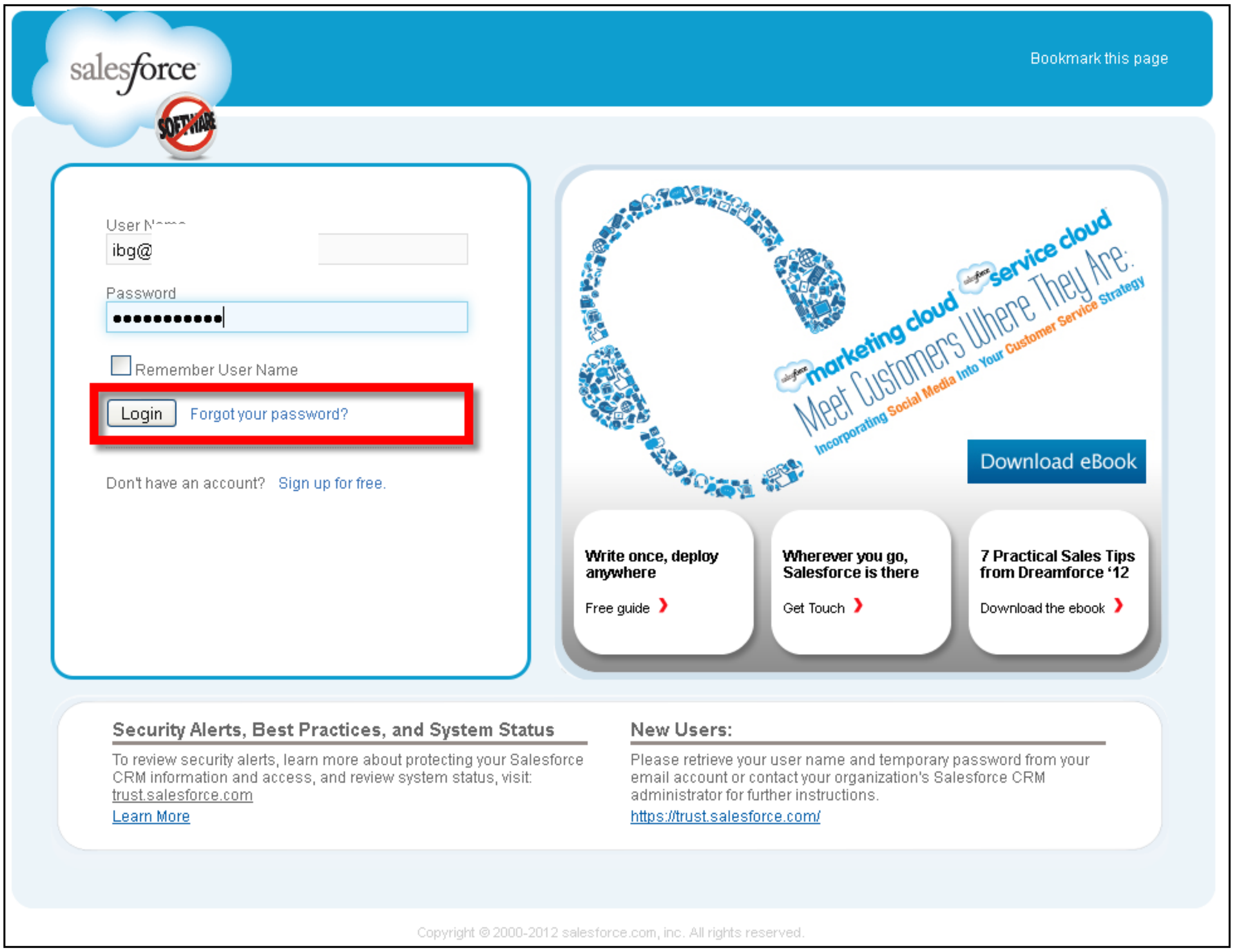
Step	Result
1. On the **Desktop**, **double-click** the **Internet Explorer** icon/shortcut or **click** the icon located at the bottom-left of the **Task Bar**.	The Home page of ABC® displays.
2. In the **Address Bar**, **type** '**www.login.salesforce.com**' and **click** the **Go** button or **press** **Enter** on the keyboard.	The Salesforce Login screen displays.
Tips, Tricks, and Shortcuts: Currently, Salesforce can **only** be accessed via Edge or Chrome. It **cannot** be accessed using the Mozilla Firefox browser.	



Step	Result
3. On the **Salesforce Login** screen, **type** your credentials in the **User Name** and **Password** fields.	Username and password appear in the respective fields.
4. **Select** or **deselect** the **Remember User Name** checkbox, as preferred.	If the checkbox is selected, subsequent login will **not** require username input.
5. **Click** the **Login** button.	The Salesforce Home Page displays.

Tips, Tricks, and Shortcuts: For training purposes, you will be provided generic user name and password credentials.

Retrieving Passwords



Step	Result
6. If you forget your password, **click** the **Forgot your password?** link to generate a temporary password.	The 'Having Trouble Logging In' screen displays, prompting you to enter your username.
7. **Enter** your username in the **User Name** field and **click** the **Continue** button.	An email is sent to your email address, automatically.
8. **Open** the email and **answer** password question to log in to Salesforce using the temporary password, then **click** the **Continue** button.	The Salesforce Login screen displays, prompting you to enter a new password.

Tips, Tricks, and Shortcuts: You may be prompted to restart your computer whenever your password is reset or when logging in to a computer other than your own.

Module 3: Working with SoftPhone

Upon successful completion of this module, you will be able to:

- ✓ Explore the Softphone interface and understand how it is used to make calls over the Internet
- ✓ Identify call center tools on the SoftPhone/CTI Adapter sidebar
- ✓ Place, answer, hold, transfer and conference calls
- ✓ View and edit call logs
- ✓ Wrap up calls
- ✓ Log out of SoftPhone
- ✓ Troubleshoot SoftPhone issues

Understanding SoftPhone Basics

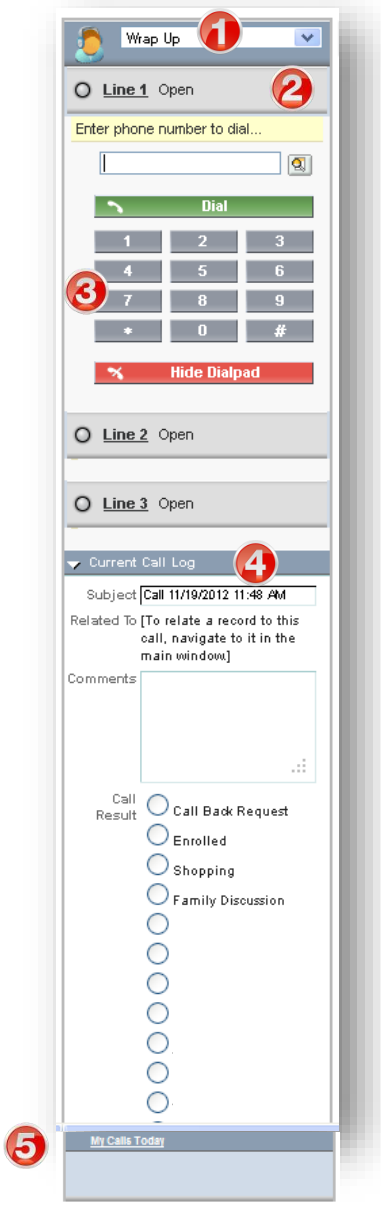
A softphone is a call center, software program that allows you to make telephone calls over the Internet using your computer. The SoftPhone/CTI Adapter sidebar appears on the left side of the Salesforce window and is available on every tab.

With SoftPhone, you can perform the following functions:

- ☑ Log in to the call center
- ☑ Change your call center state to show whether you are ready or not ready to receive calls
- ☑ Answer a call
- ☑ Dial a phone number using the SoftPhone dialpad
- ☑ Put a caller on hold and retrieve a call from hold
- ☑ Initiate a conference call with an external number
- ☑ Transfer a phone call to an internal extension or an external number
- ☑ Start a new call on a second line

Navigation

The SoftPhone sidebar contains several sections, fields and buttons allowing you to perform activities such as log in to the call center, modify your call center state to show whether you are ready to receive a new call, dial a phone number using the built-in dialpad, place a caller on hold, initiate a conference call with another call center user or an external number, transfer a phone call to an internal extension or an external number, and view call logs.

<table>
<tr><td rowspan="5">
</td>
<td>1</td><td>Call Center State
A drop-down list that lets you specify whether you're ready to receive calls.</td></tr>
<tr><td>2</td><td>Phone Line Header
Shows the status of the phone line. The status icon changes colors and blinks. You can click a line (i.e. Line 1) to show or hide the line's dial pad and call information area.</td></tr>
<tr><td>3</td><td>Dialpad and Call Button Area
Shows buttons that allow you to dial, hang up, place a caller on hold, transfer, conference, and open a second line while on a call.</td></tr>
<tr><td>4</td><td>Current Call/Last Call Log
Shows information related to a call that is saved automatically. The Subject field includes the date and time of the call. The Related To field is, automatically, populated with a Person Account or Contact record. Once a call ends, this field becomes the Name field. The Comments field is left blank as notes are added in the Person Account screen. IBGs only interact with the Call Result section when wrapping up a call.</td></tr>
<tr><td>5</td><td>My Calls Today
Opens a report of all the calls you've made or received in the past day, including associated records and the result of each call.</td></tr>
</table>