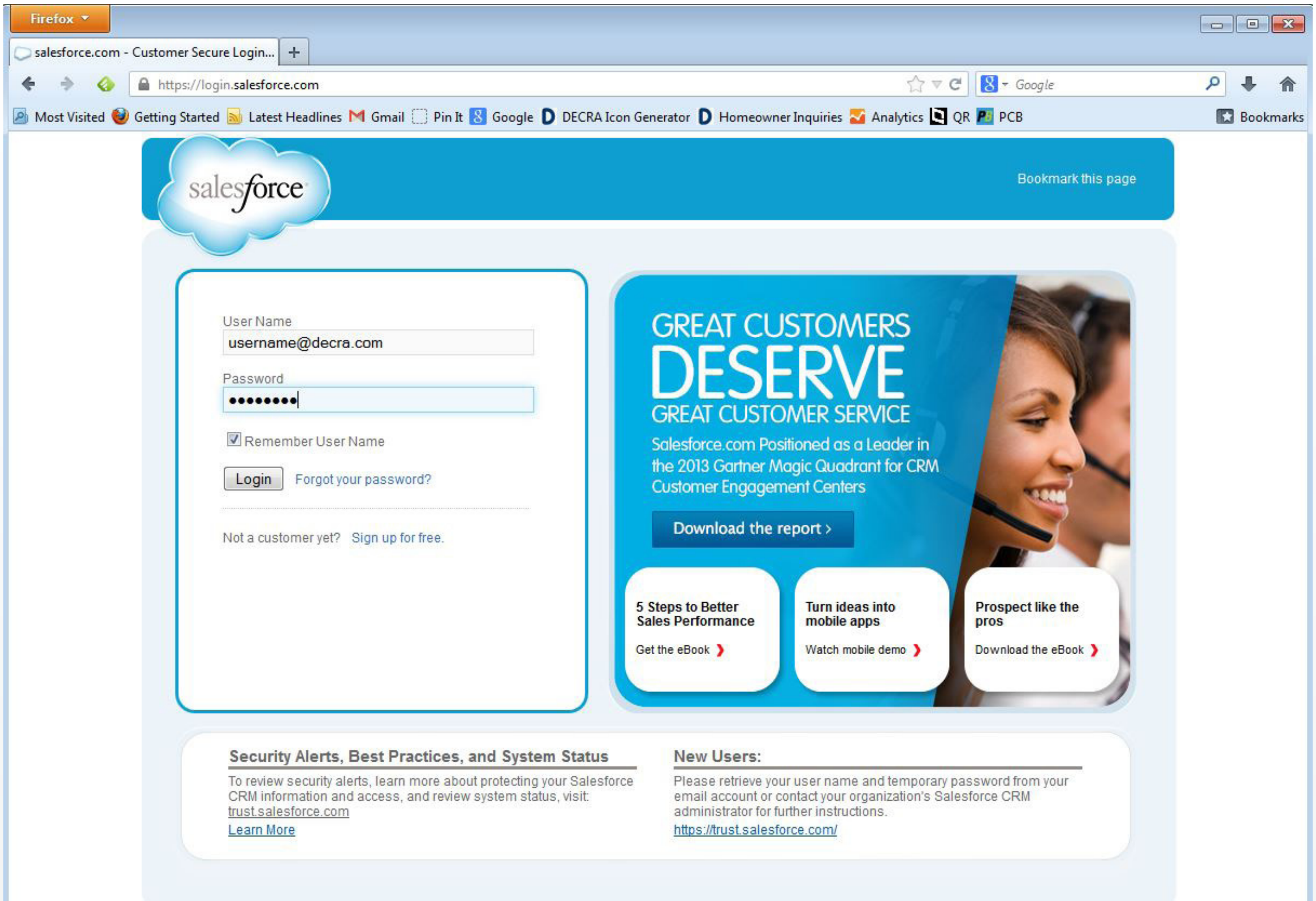
CONTENTS

You can access Salesforce.com from online, using Firefox (preference)
URL: https://login.salesforce.com/

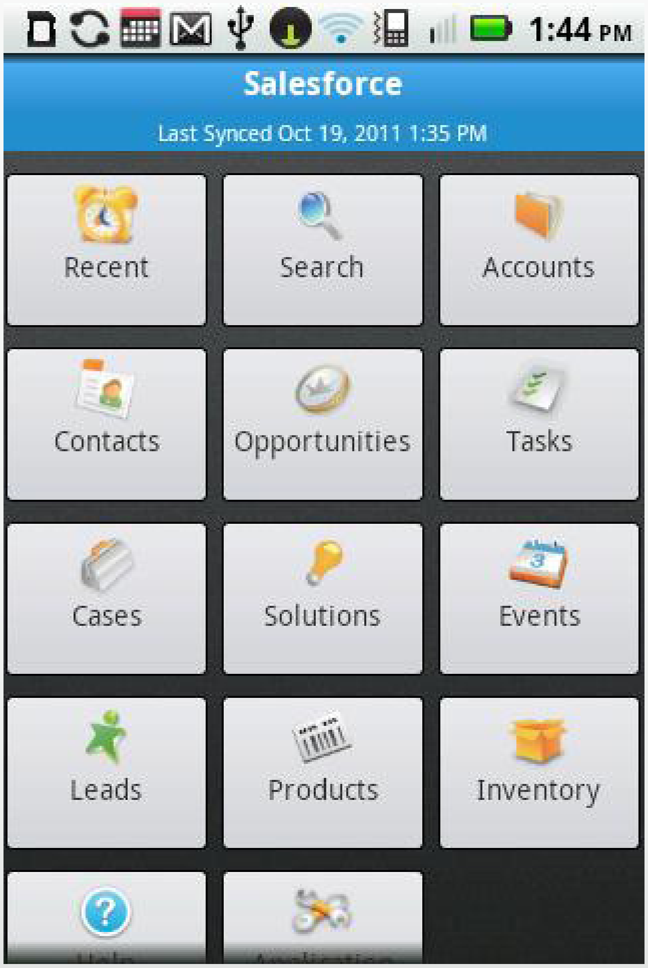


Installing and Configuring Salesforce.com for your Smartphone

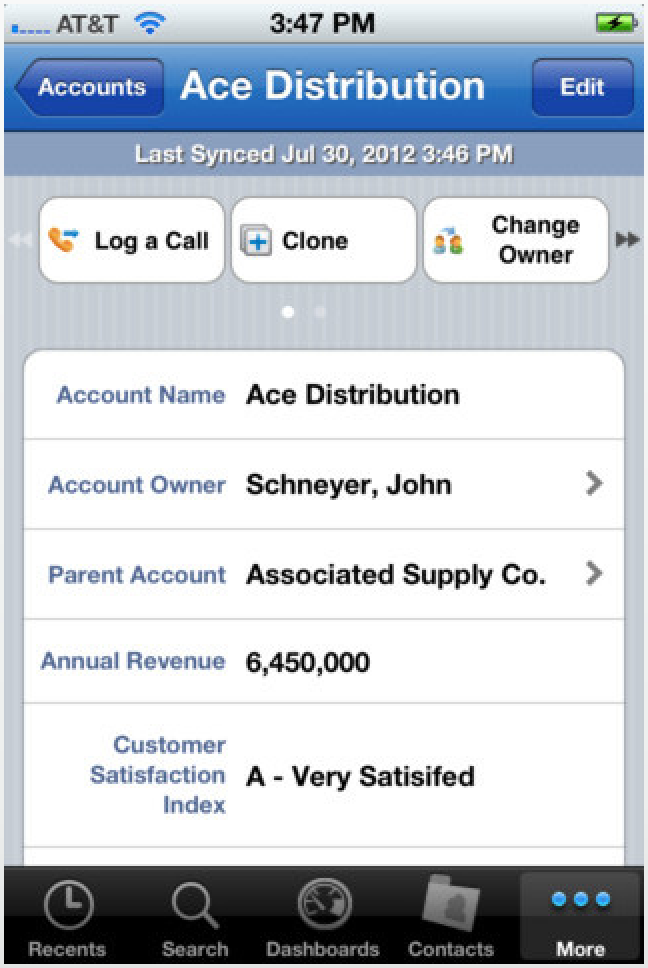
Step 1: Click on the Android Store (Android) or App Store (iPhone)
Step 2: Search the app store for “Salesforce.com”
Step 3: Click to green button to install App.
Step 4: Once installed, click on the icon for Salesforce.com icon
Step 5: After clicking the icon, you will see the Salesforce.com start up screen
Step 6: Enter your login name and password and click “Activate”. The first time you log in will be the only time it needs to do this.
Step 7: After set up, it will ask you to create a 5 digit password (numerical) of your choosing. Please write that password down.

Links to download: iPhone | Android

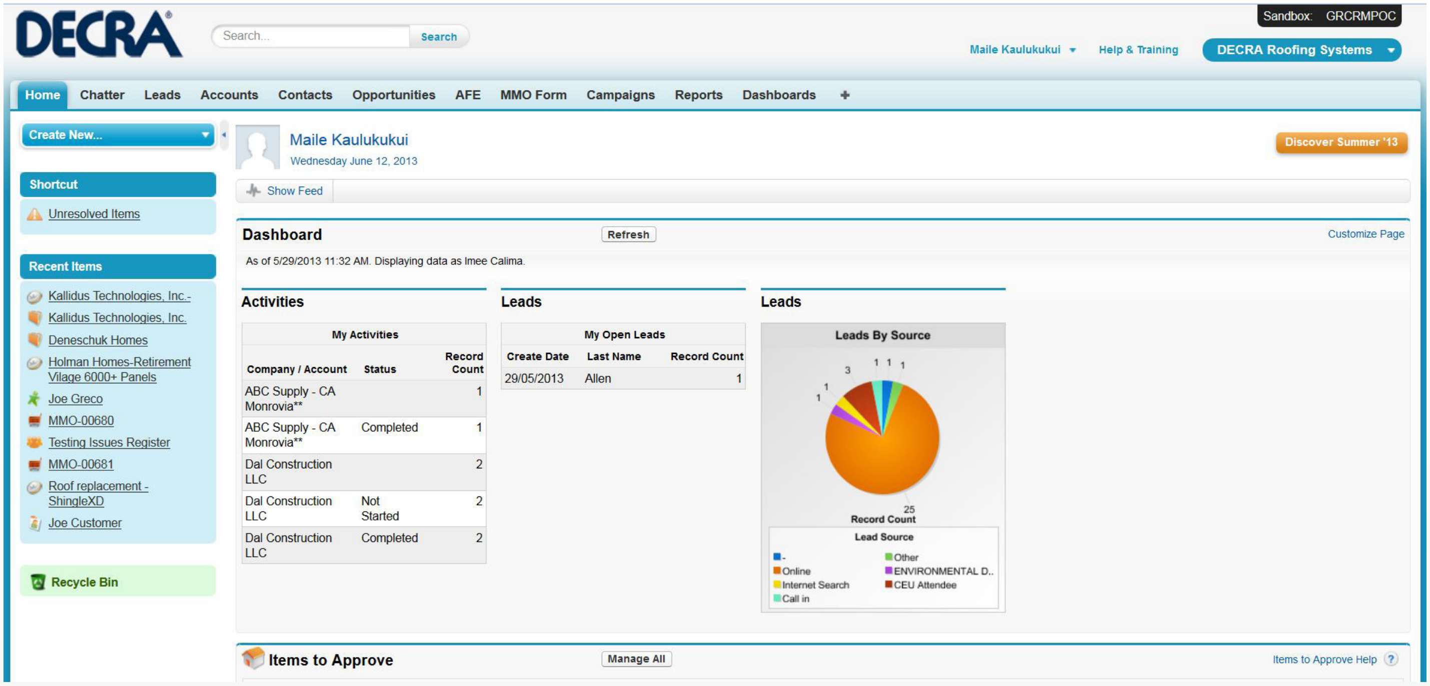
Android Phone



iPhone



Once logged in to Salesforce.com, you will reach the main HOME screen.
You will use tabs to navigate to the sections of Salesforce.com that you'll be utilizing.



Chatter

The Chatter tab is your collaboration home base and gives you instant access to most of the collaboration features in Chatter.

Leads

Web or Phone Leads (People) - These are prospects, have not worked with DECRA before, and are prospects.

Accounts

Prospect Accounts - An organization that has not had a business transaction with DECRA yet, but have an opportunity and could be a potential customer. This is often converted from a Lead.
Parent Accounts - Accounts that are the parent company of multiple locations. These are formatted with company names and no state or city [example: ABC Supply]
Accounts - These are individual locations that can be related back to a Parent Account. These are formatted with company names and have state + city [example:

Contacts

Customers (People) - These are people who work for either a Parent Account or an Account. This record can be linked to the Account.

Opportunities

Opportunity represents a potential roof sale/revenue and pending deals with your accounts. By adding your opportunities, you are also building your pipeline which will contribute to your forecast.

AFE

Approval for Expenditure Forms are used for expenditure approvals. All AFEs need to be approved by Zone Managers, and by the Vice President (if total order exceeds $1000).

MMO Form

Marketing Materials Order Form, or MMO, are used to request Marketing support materials, samples, brochures, flyers, etc. All MMOs need to be approved by Zone Managers, and by the Vice President (if total order exceeds $1000).

Campaigns

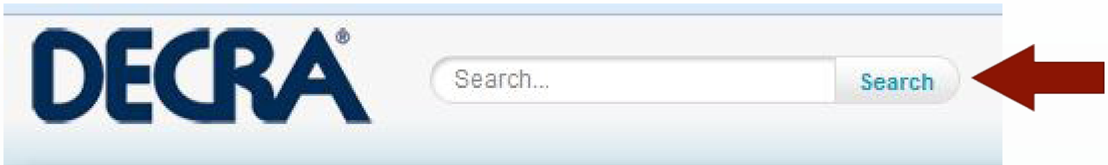
A campaign is an outbound marketing project that you want to plan, manage, and track within Salesforce. It can be a direct mail program, seminar, print advertisement, email, or other type of marketing initiative.

Reports

Reports give you access to the data your organization has accumulated over time, enabling you to make informed decisions. You can examine your organization's data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others via dashboards.

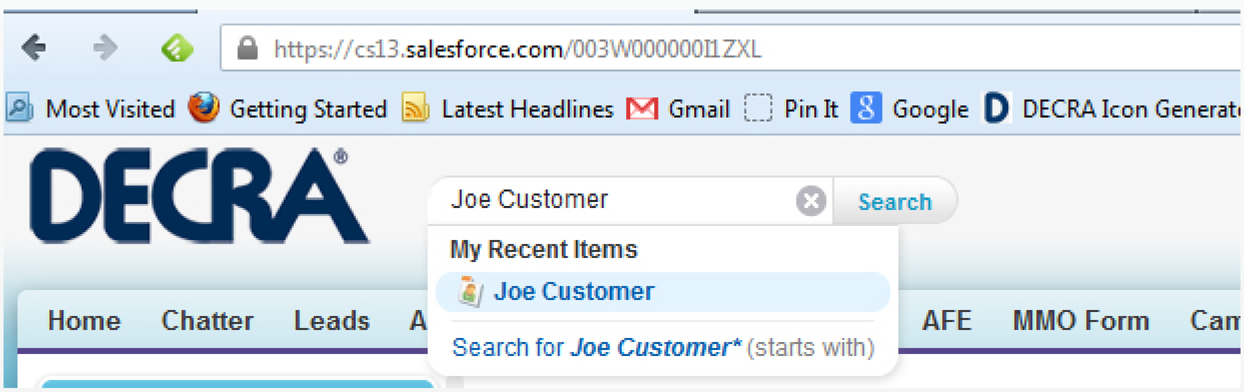
Searching in Salesforce.com

From any screen, you can always search the entire Salesforce.com from the search bar.

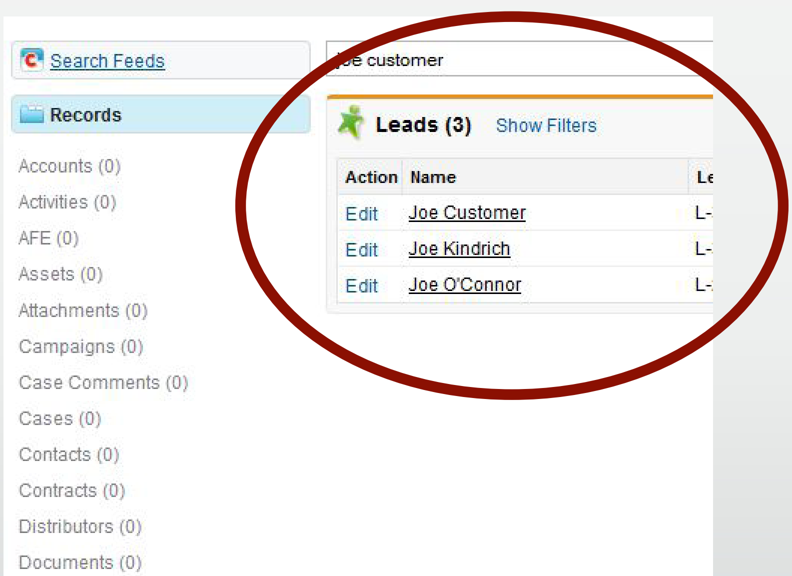


Example: I want to find my contact Joe Customer, but I am not sure if he's a lead or a contact....

Begin typing Joe's name and all the relevant quick results will appear. Or, enter JOE in the search bar and SEARCH to query the entire system.



You will get all relevant results with the term JOE. Also, you can browse the related results in Salesforce.com by drilling down to that section. All available sections will be on the left column of the results. Also, other results that may be what you are searching for will occur in the results.

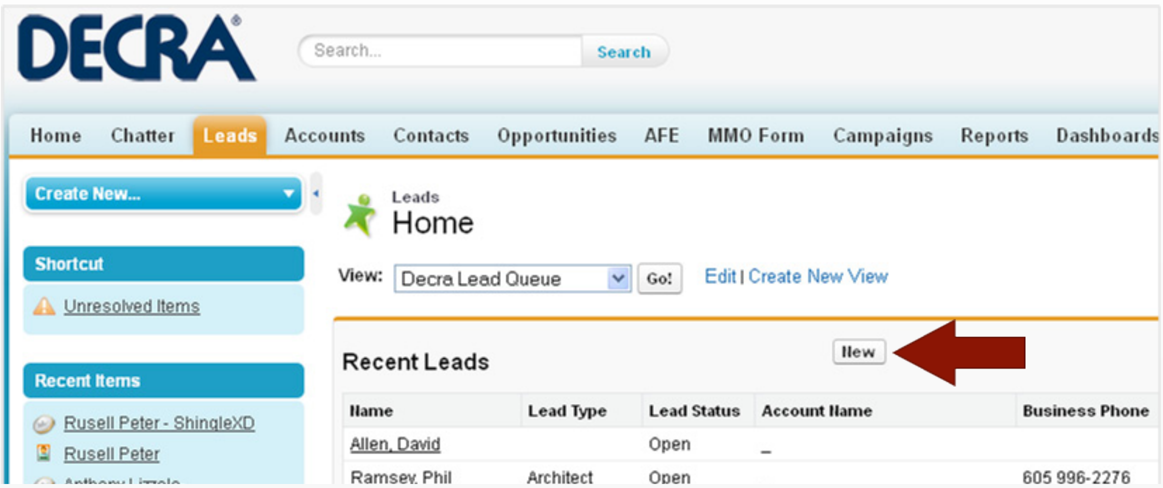


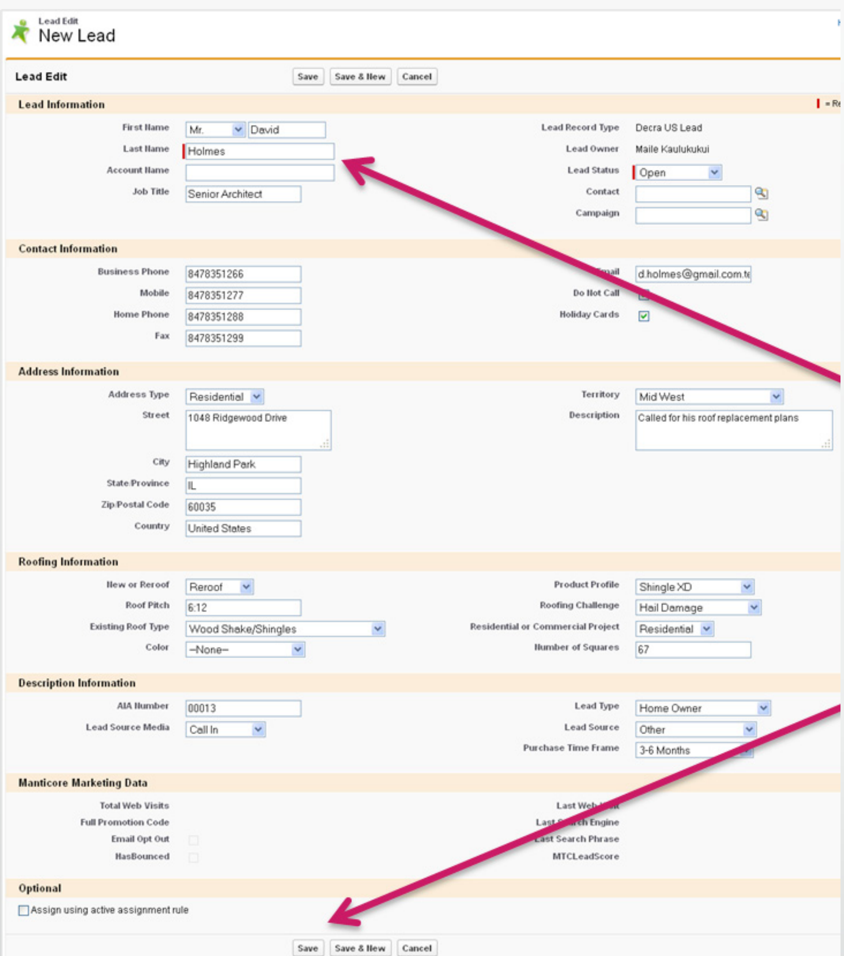
Leads

Web or Phone Leads (People) - These are prospects and have not worked with DECRA before.

Create a new lead

1. To create a new lead, navigate to “Leads” tab.
2. Click “New” button and wait until a new Lead form completely opens.

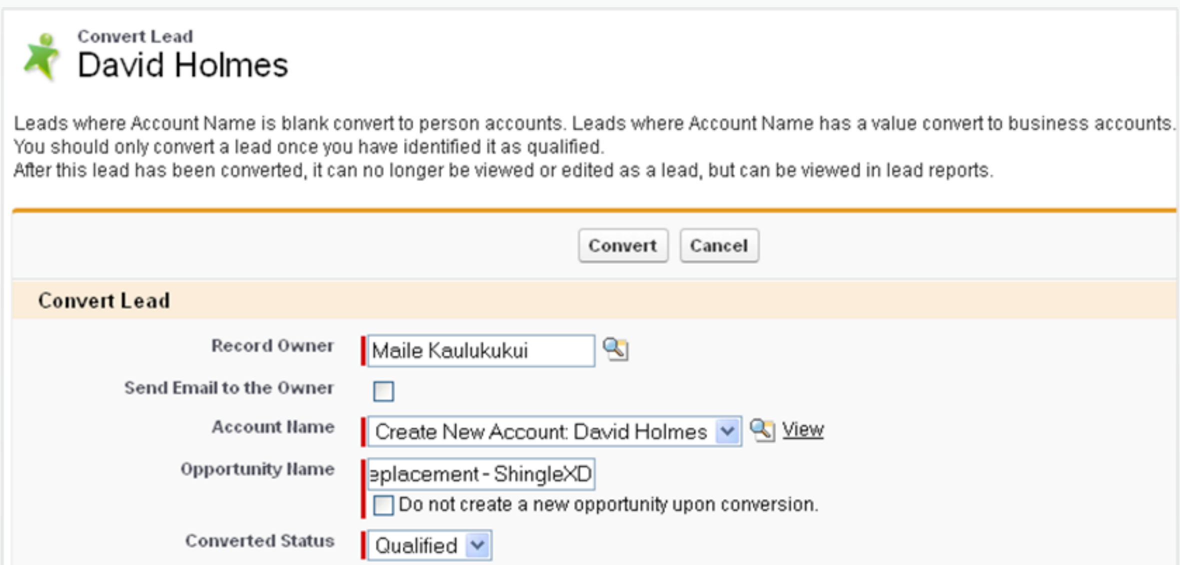




3. Enter all the relevant lead information into the New Lead Edit screen.
4. Fields marked with a |red bar are mandatory. The lead record cannot be saved when you leave any of these fields empty.
5. Once you have completed your entries, click “Save” button.

Convert a Lead to Person Account & Opportunity

1. Once you have saved the new Lead record, click “Convert” for the system to create a Person Account & Opportunity record for you to nurture on.
2. Specify a descriptive Opportunity Name
3. Ensure that “Do not create a new opportunity upon conversion” is unchecked.
4. Note that Converted Status is set to “Qualified” as default.
5. Click “Convert” to proceed.

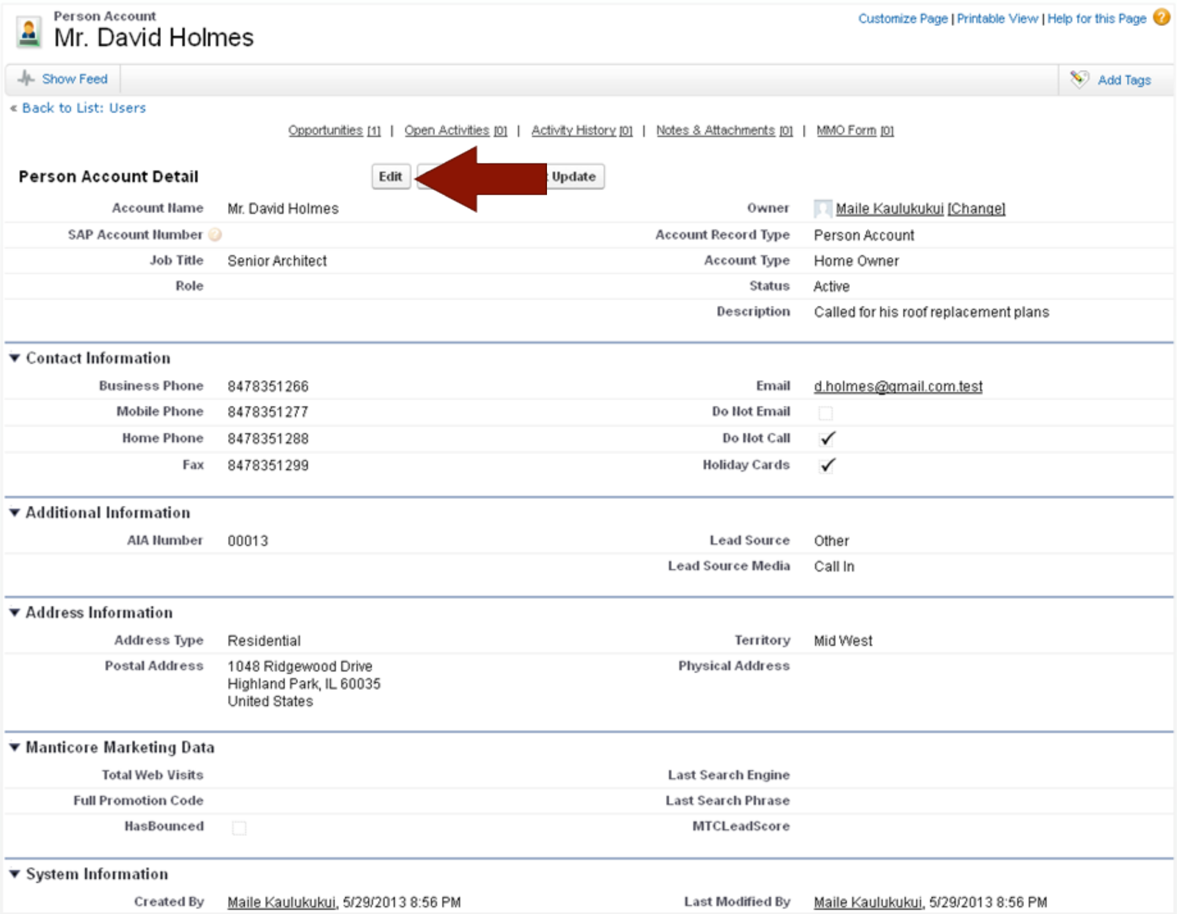


Convert a Lead to Contact & attach to existing Account or create new Account

1. Once you have saved the new Lead record, click “Convert” for the system to create a Contact record
2. Specify a descriptive Opportunity Name or check “Do not create a new opportunity upon conversion.”
3. In Account, either choose the account you want to attach the new contact to, or chose “Create New Account: Account Name”
4. Note that Converted Status is set to “Qualified” as default.
5. Click “Convert” to proceed.

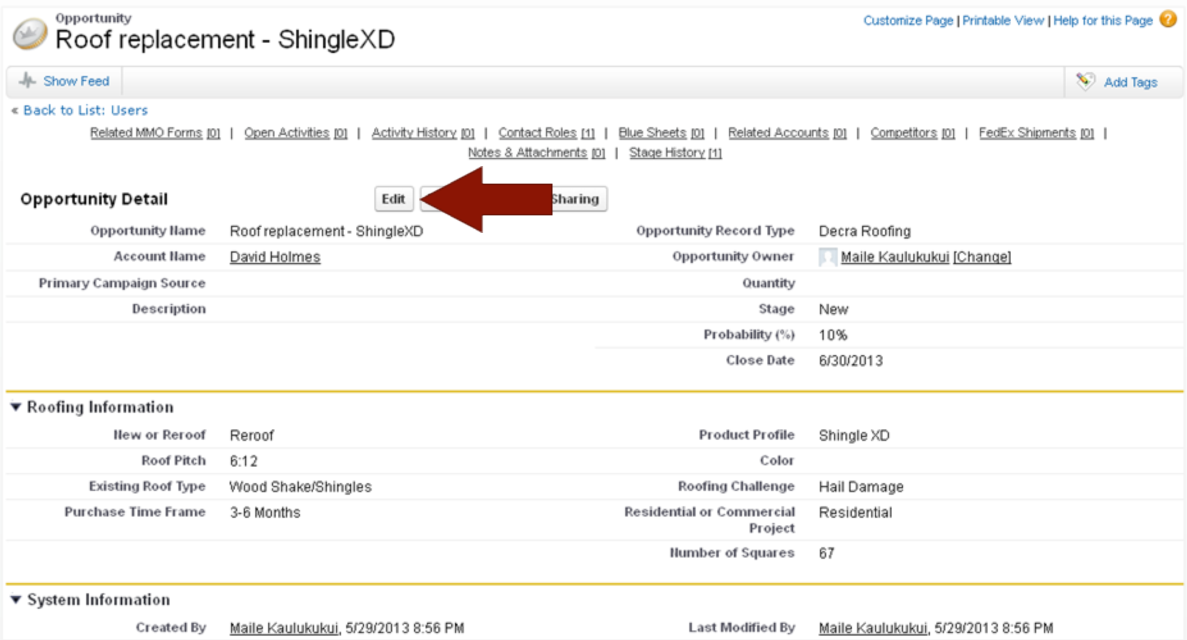
Lead Converted into Person Account

1. All information as shown on the right is captured from converted Lead.
2. Update other pertinent information by clicking “Edit”
3. Save the Person Account record once you are done with your updates.



Lead Converted into Opportunity

1. All information as shown on the right is captured from converted Lead.
2. Update other pertinent information by clicking “Edit”
3. Save the Opportunity record once you are done with your updates.

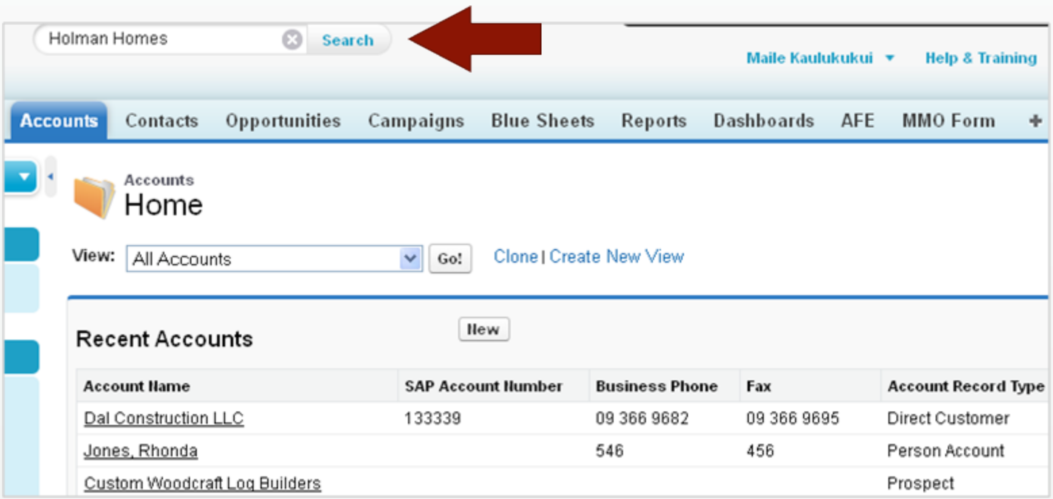


Accounts

1. Prospect Accounts - An organization that has not had a business transaction with DECRA yet, but have an opportunity and could be a potential customer. This is often converted from a Lead.
2. Parent Accounts - Accounts that are the parent company of multiple locations. These are formatted with company names and no state or city [example: ABC Supply]
3. Accounts - These are individual locations that can be related back to a Parent Account. These are formatted with company names and have state + city [example: ABC Supply - AZ Phoenix]
4. Person Accounts - Homeowners who have a confirmed DECRA roof, sources can be RM, Web form (Warranty Registration).

Searching Accounts

To search accounts, find the search tool bar at the upper left corner in Salesforce.com. For more results, input less information. All accounts do not have States or cities in their names, SUB ACCOUNTS however do. Clicking on the account you want to view will bring up the account window



To find an ACCOUNT

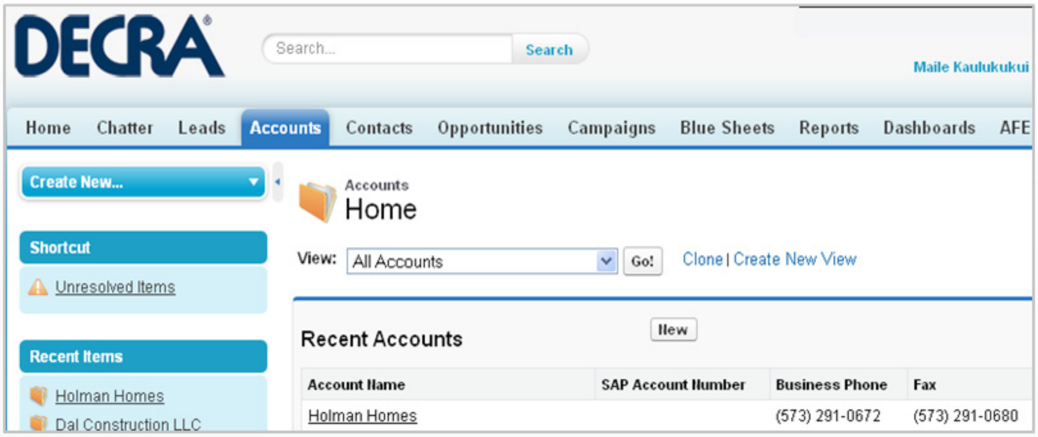
Enter company name. If the results generated do not have your company you were seeking, try to enter less information.

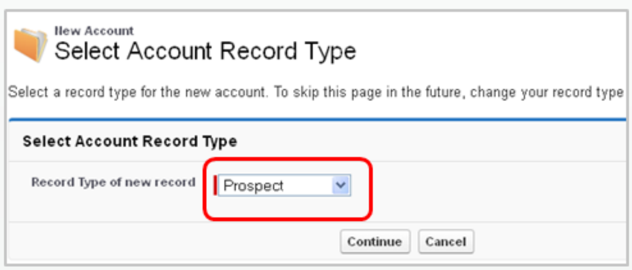
To find a SUB ACCOUNT

To find all ABC Supply locations in California, input: ABC Supply - CA
For all ABC Supply locations, sorted by state, type in just ABC Supply

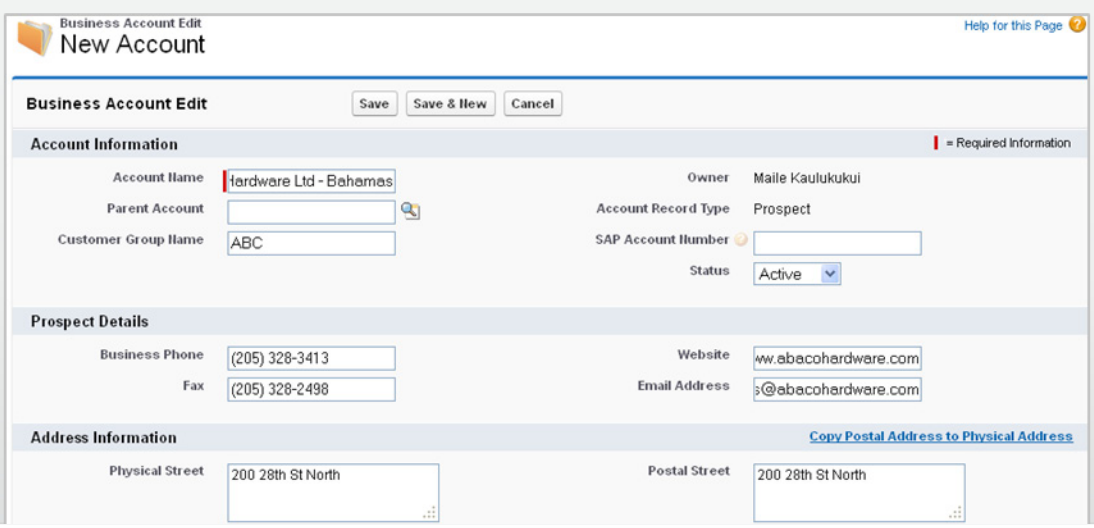
Create a Prospect – Accounts tab

1. Click “Accounts” tab.
2. Click “New” button.
3. Select “Prospect” from the record type option list and click “Continue” button.



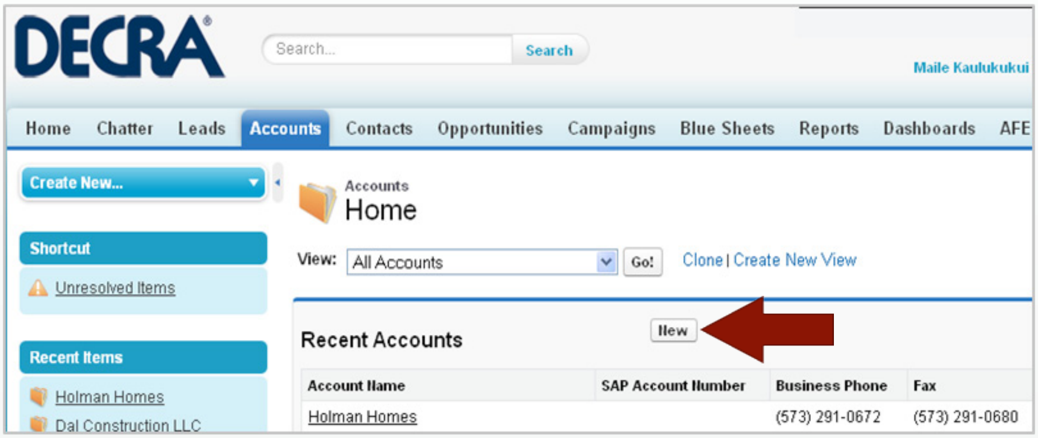


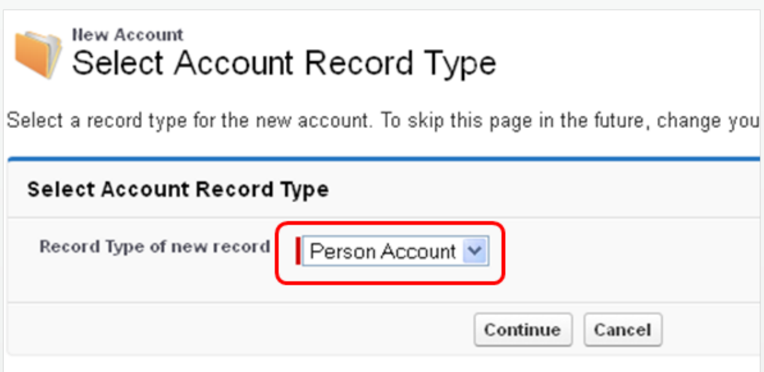
4. Enter all the relevant prospect information into the New Account Edit screen.
5. Note that default “Status” is set to “Active”
6. Field marked with a |red bar is mandatory. The prospect record cannot be saved when you leave this field empty.
7. To auto populate “Physical Address” similar to “Postal Address” information, click “Copy Postal Address to Physical Address” link.
8. Once you have completed your entries, click “Save” button.

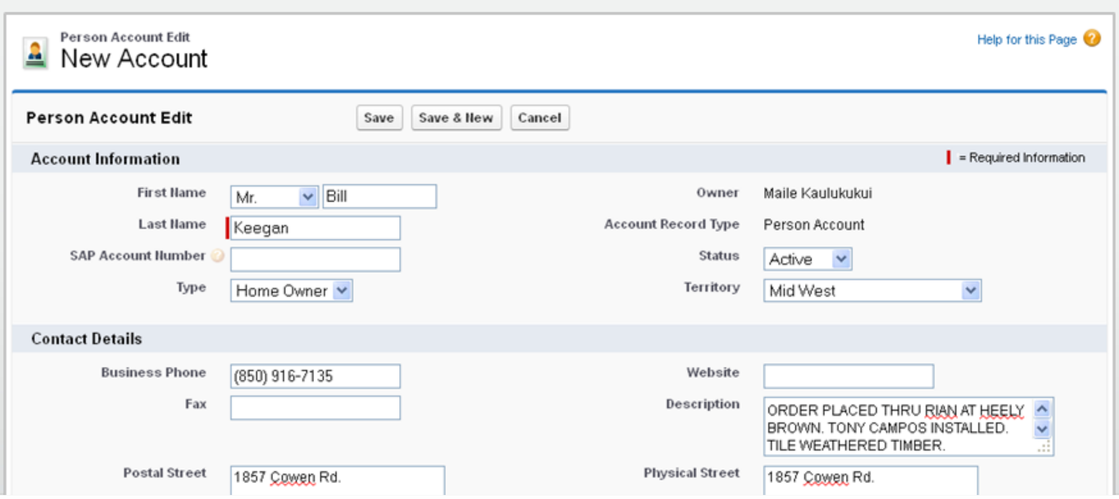


Create a Person Account

1. Click “Accounts” tab.
2. Click “New” button.
3. Select “Person Account” from the record type option list and click “Continue” button.
4. Enter all the relevant person account information into the New Account Edit screen.
5. Field marked with a |red bar is mandatory. The person account record cannot be saved when you leave this field empty.
6. Note that default “Status” is set to “Active”.
7. Once you have completed your entries, click “Save” button.

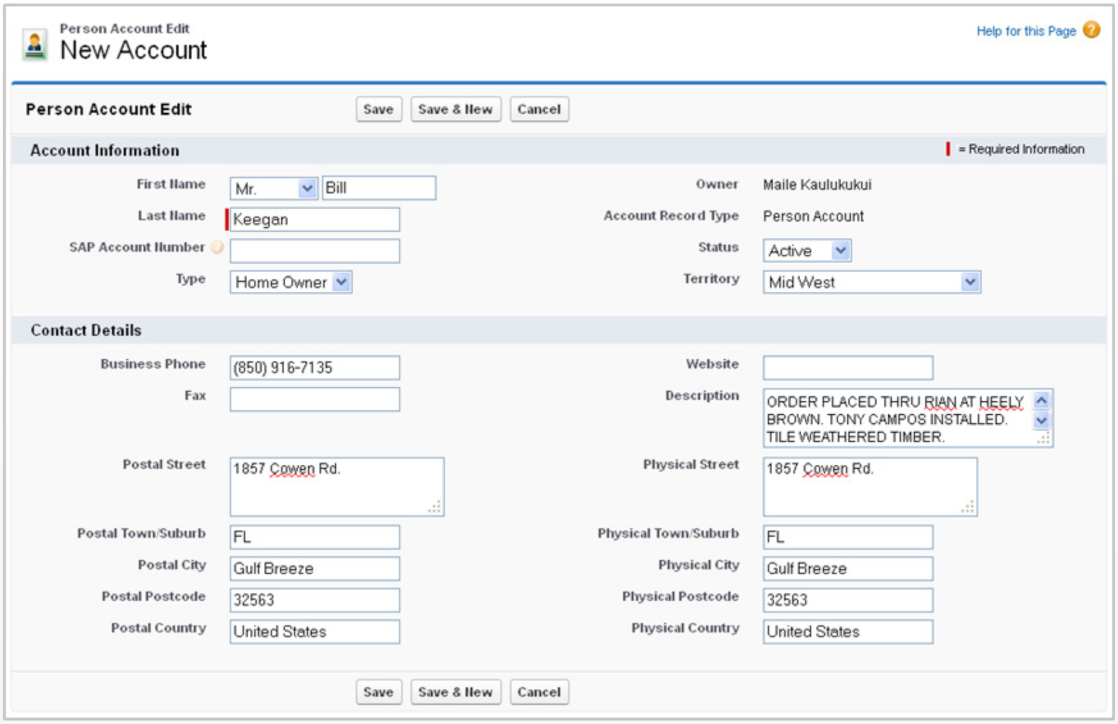






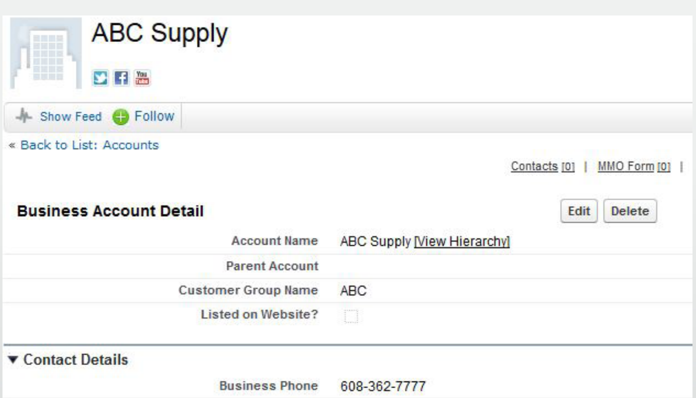
Viewing and working in an Account Record

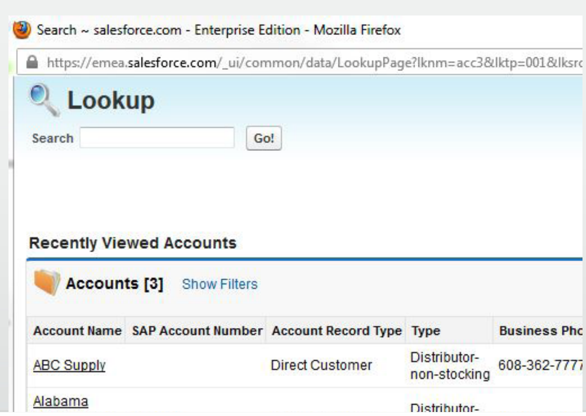
Once you have found the account record that you want to work in from the search function, click on the name of the account and a new window will be brought up. This is the main ACCOUNT view, which is the same if it is an ACCOUNT or a SUB ACCOUNT.



Adding a Parent Account to an Account

1. Click the button in the field “Parent Account” to search, or double click the “Parent Account” field to edit an existing Account.
2. Use the search function at the upper left to find the account you want to add and click on the account name to add
3. Once you have added the parent account, click “Save” button.



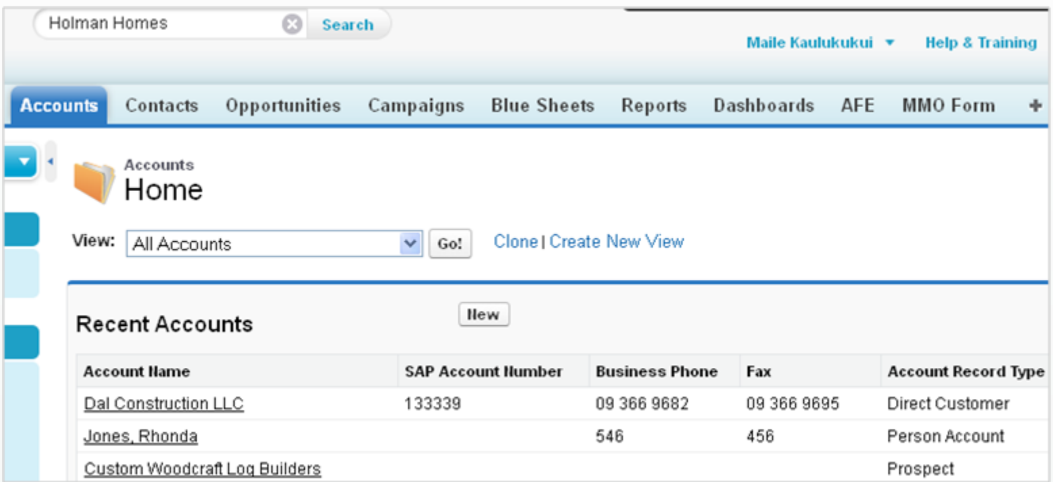


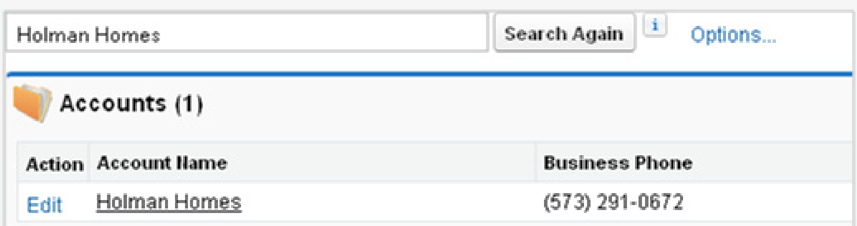
Contacts

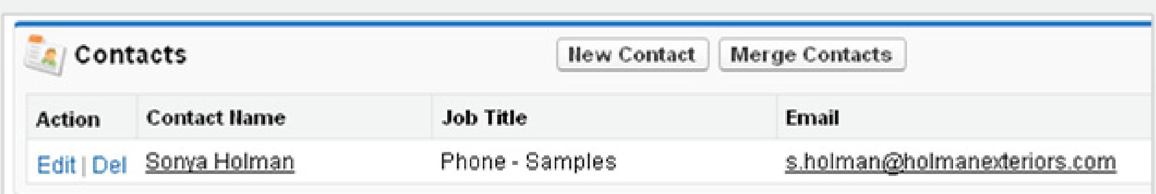
Customers (People) - These are people who work for either a Parent Account or an Account. This record can be linked to the Account.

Create a Contact – Within the Account

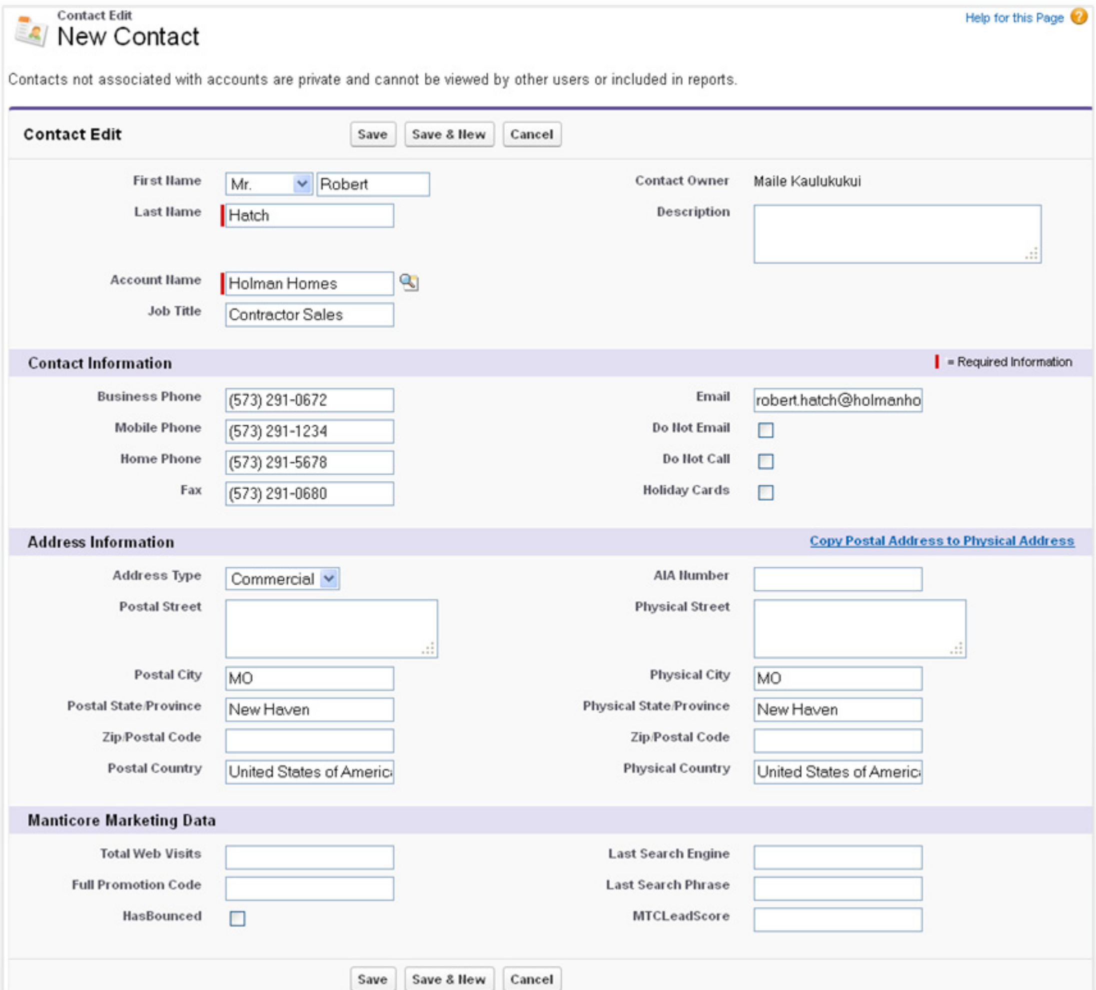
1. Search for an Account in the global search bar to which the account is affiliated with.
2. Click the account name from the result search to open the account record.
3. Scroll down to the “Contacts” related list on the Contact page.







4. Enter all the relevant contact information into the New Contact Edit screen.
5. Fields marked with a |red bar are mandatory. The contact record cannot be saved when you leave any of these fields empty.
6. Note that “Account Name” is pre-populated accordingly.
7. To auto populate “Physical Address” similar to “Postal Address” information, click “Copy Postal Address to Physical Address” link.
8. Once you have completed your entries, click “Save” button.

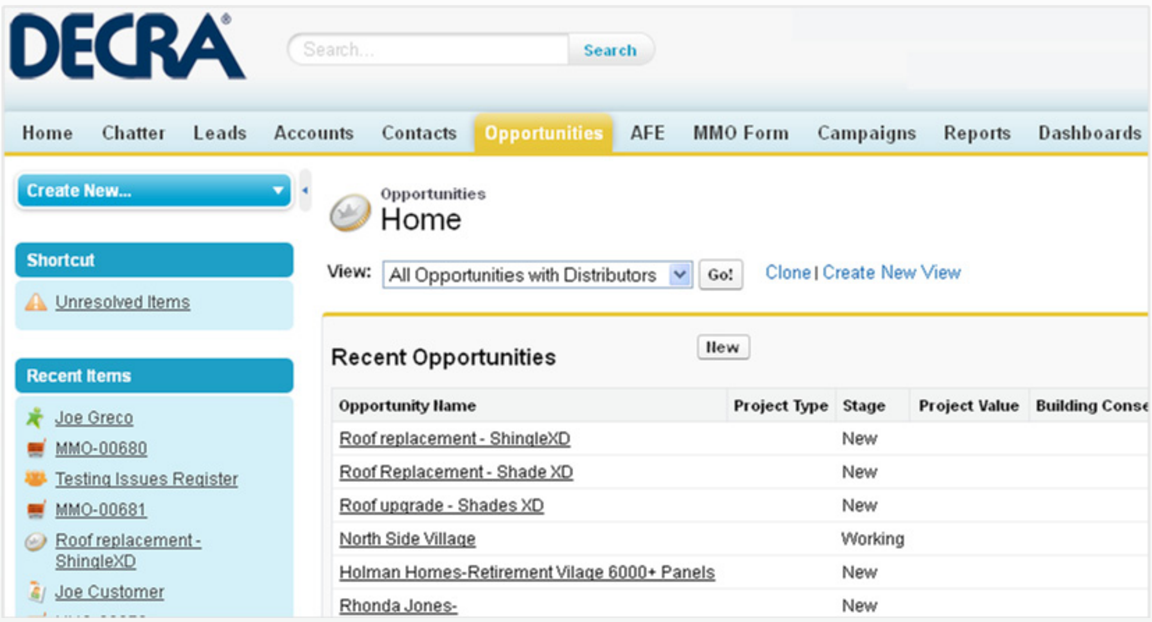


Opportunities

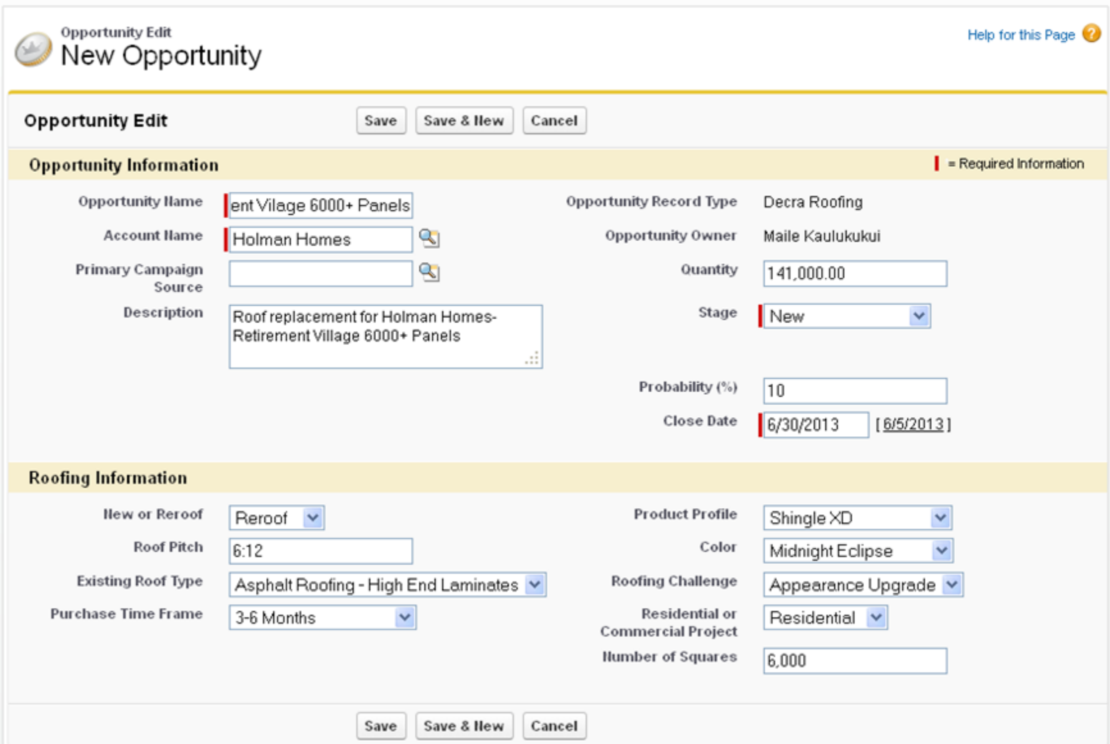
Opportunity represents a potential roof sale/revenue and pending deals with your accounts. By adding your opportunities, you are also building your pipeline which will contribute to your forecast.

Creating Opportunities

To create a new opportunity, navigate to “Opportunities” tab.
Click “New” button and wait until a new Opportunity form completely renders.



1. Enter all the relevant opportunity information into the New Opportunity Edit screen.
2. Fields marked with a |red bar signifies mandatory information to provide.
3. Specify the source campaign where this opportunity originated. This will help you in measuring the ROI of your marketing programmes.
4. Note that “Probability (%)” is system populated depending on the “Stage” you have specified.
5. Please be guided by the stage and probability (%) table provided.
6. Once you have completed your entries, click “Save” button.

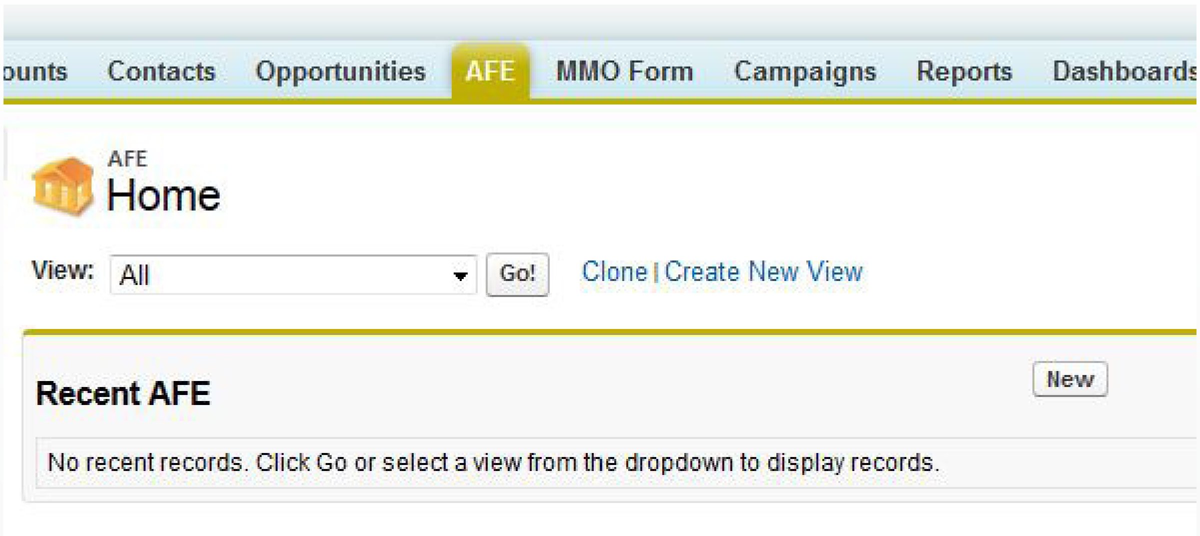


STAGE	PROBABILITY (%)
New	10
Working	20
Needs Analysis	30
Value Proposition	40
Meeting Blocked	50
With 3rd Party	60
Closed Won	100
Closed Lost	0

AFES

Creating AFES

1. Click on the tab called “AFE”, then click on “New” to create a new AFE.



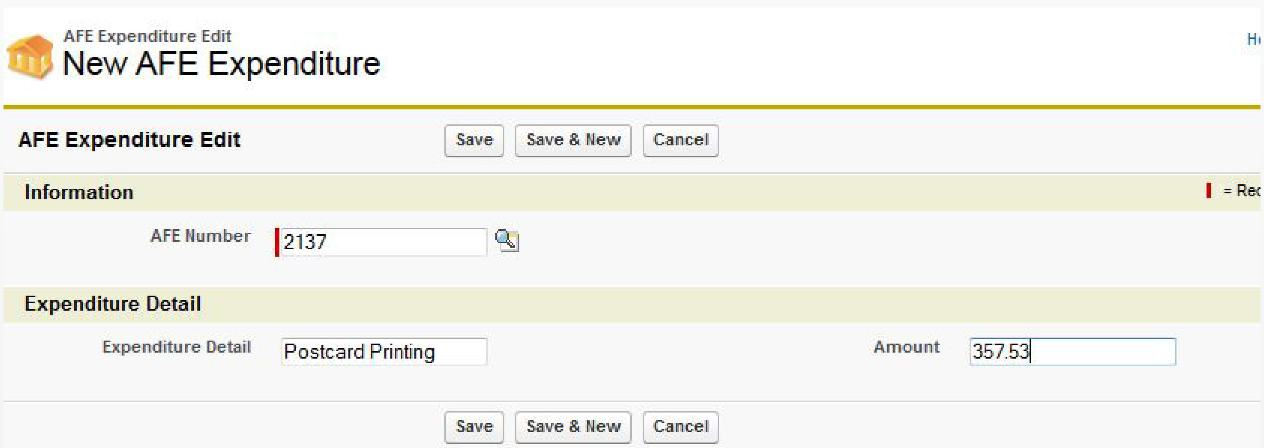
2. Give your new AFE a name in “AFE Name” - this should be useful for you to find this AFE, since each will be auto numbered as well.
3. Enter all the relevant opportunity information into the New AFE Edit screen.
4. Fields marked with a |red bar signifies mandatory information to provide.
5. In the information section, use the following for your AFEs:

TYPE/ACTION REQUESTED	AFE TYPE
Marketing & Credit	Open House
Marketing & Check	Trade show booths
Marketing & Shipping	Product for displays
Marketing & Marketing	Email Blasts, Flyers
Marketing & Expense Report Back Up	Marketing, for expense back up
Other & Credit	Touch up kits
Other & Check	Builder Rebates
Other & Shipping	Material Replacement
Other & Marketing	Marketing Resources
Other & Expense Report Back Up	Office Supplies

6. If you are requesting a check or credit, make sure to select a Payee Account or Contact in the section “Check/Credit Details”
7. If you want something shipped (materials or marketing materials), select a Contact or Lead in the “Shipping Details” section.
8. Once filled in, click “Save” to begin adding your individual expenditure items.

9. After clicking “Save” you will see your AFE.
10. In the section called “AFE Expenditure”, click “New AFE Expenditure” to begin adding expenses to your AFE.

11. Enter the expenditure name and the total of the expenditure. If only one expenditure is needed, click “Save”, if additional are needed, click “Save & New” to continue to add expenditures.
12. When done adding, click “Save”, then click the AFE Number to return to your AFE.

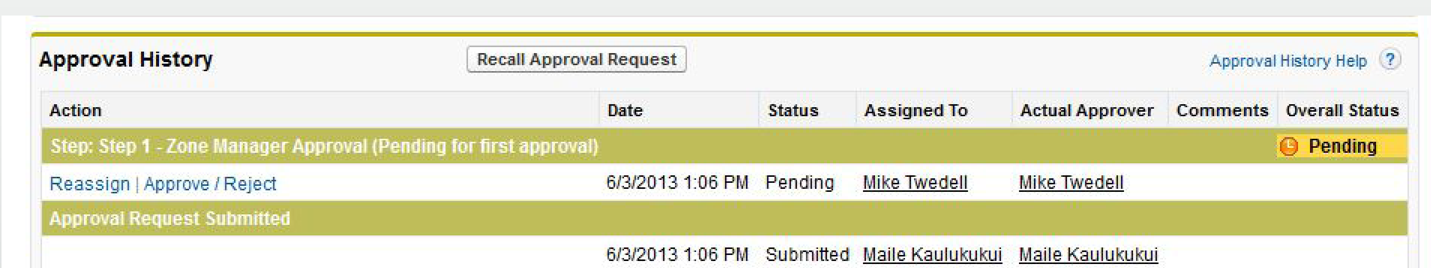


13. When done adding all expenditures, double click the field “Status”, under “Owner” and change the status to “To Be Approved” to submit for approval.

AFE Review and approval

To check on the status of your AFE, find your AFE (either by searching or from the “Recent Items” section on the far left) and click to open.

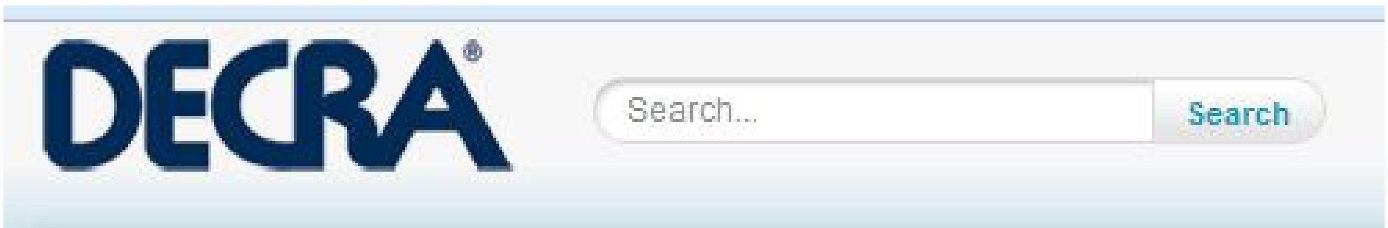
In the section called “AFE Approval History” you can check the status of your approval. An AFE with either be “Pending”, meaning waiting for approval, “Approved” or “Denied”.



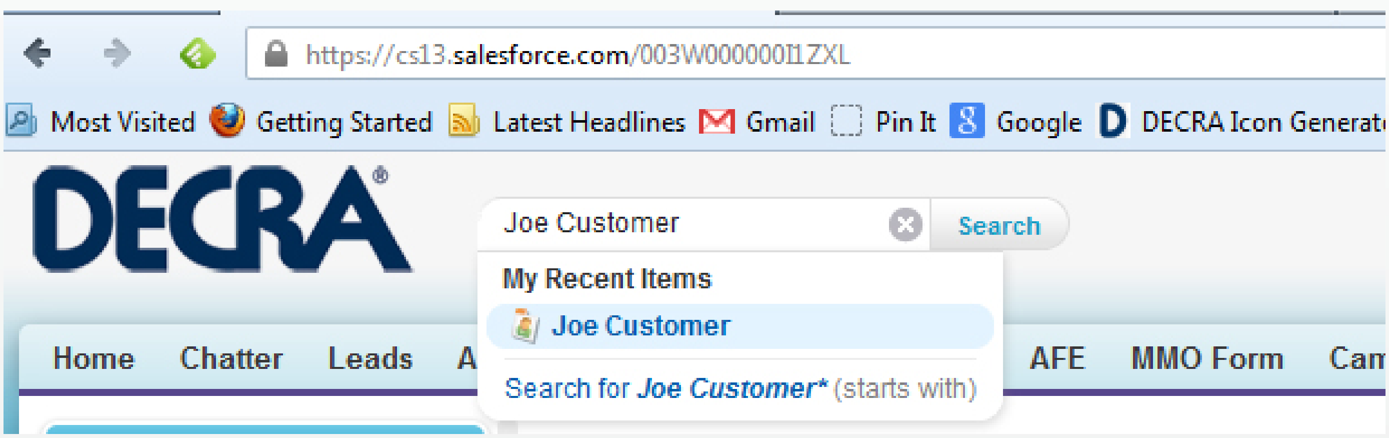
Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1 - Zone Manager Approval (Pending for first approval)						Pending
Reassign | Approve / Reject	6/3/2013 1:06 PM	Pending	Mike Twedell	Mike Twedell		
Approval Request Submitted						
	6/3/2013 1:06 PM	Submitted	Maile Kaulukukui	Maile Kaulukukui		

MMOs
Creating a New Marketing Material Request Form (MMO Form)

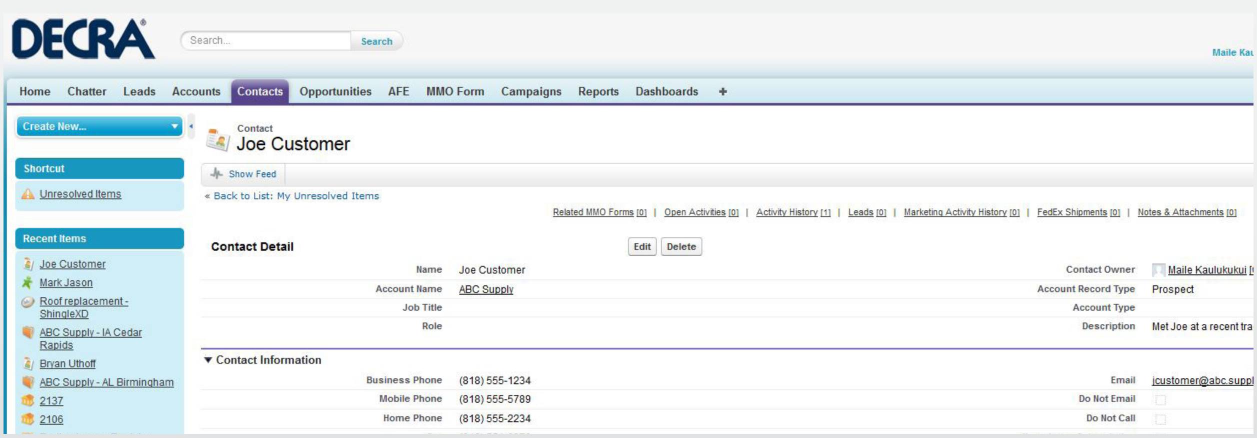
The easiest way to add a new marketing material request form is to start with the lead or contact record in Salesforce.com. From any screen in Salesforce.com, find the SEARCH tool at the upper left of the screen, right next to the DECRA logo:



In this case, we are searching for Joe Customer who works for ABC Supply. As a rule, MMO forms can be sent to CONTACTS or LEADS.

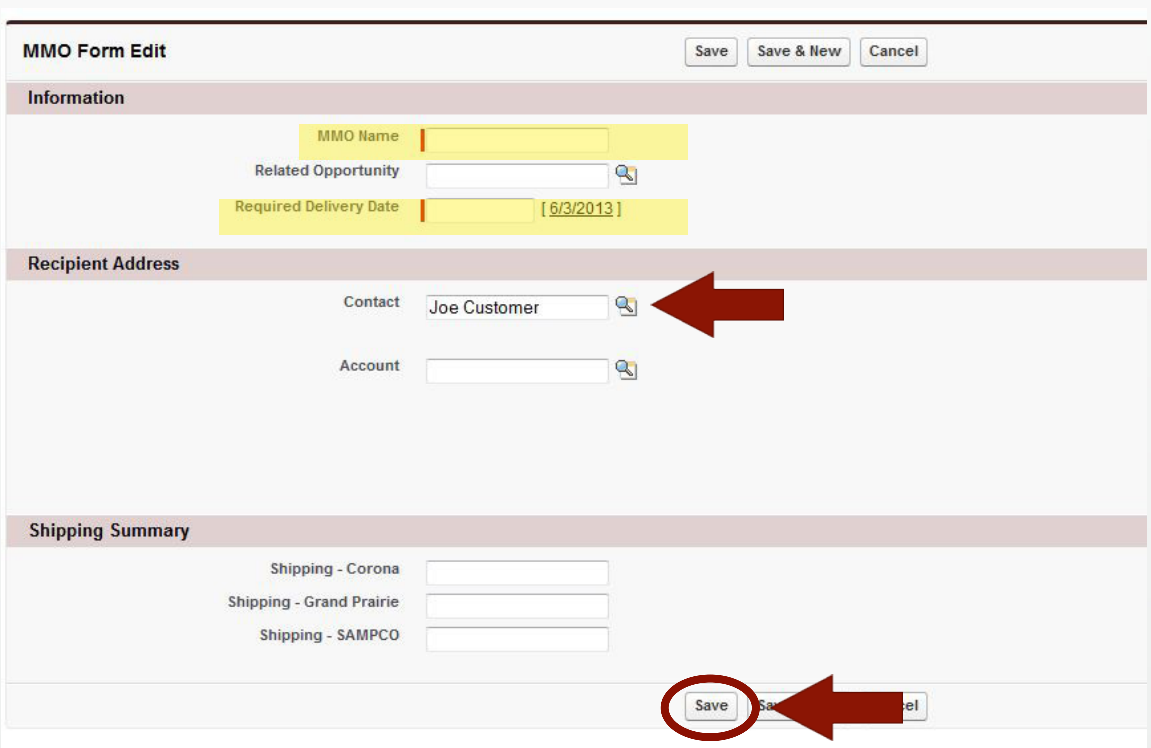


Once you find Joe, click on Joe Customer to open his contact record. Check the address that you are sending your request to, this will be ADDRESS INFORMATION in the POSTAL ADDRESS section.



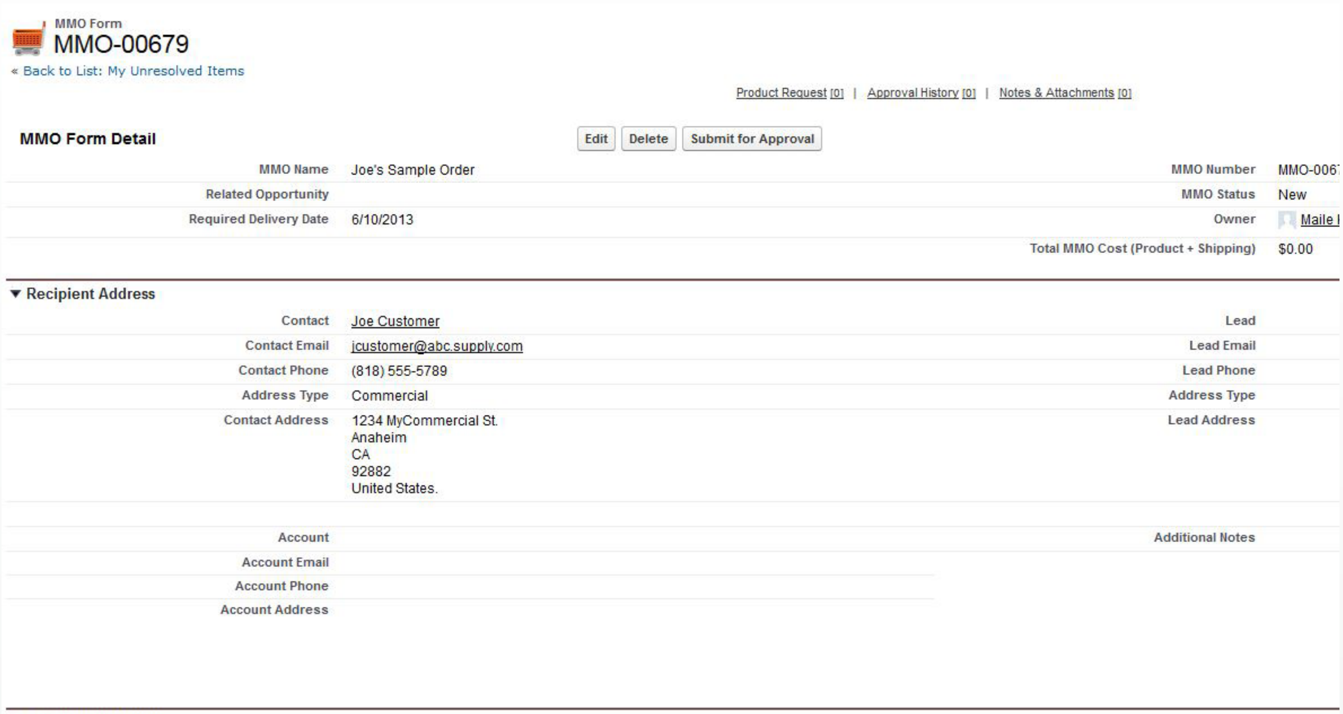
Once you have confirmed the address and phone numbers, find the section on the bottom of this contact record, called RELATED MMO FORMS. Click the button called “NEW MMO Form”. You can also do this from a lead record as well.

This will open an new MMO Form. Now you are ready to create your request. You will need to give your MMO a name and request a REQUIRED DELIVERY DATE. If you click on the REQUIRED DELIVERY DATE field, a calendar will appear so you can pick the date. Your Contact will automatically populate your “Recipient Address” field.



When you are done, click SAVE button at the bottom of this form.

You will see that your order has been created, but there are no products associated with this order. Also, your Contact address and phone number (or Lead) has automatically populated in your request from the contact you chose. Now, you can add products to this order.



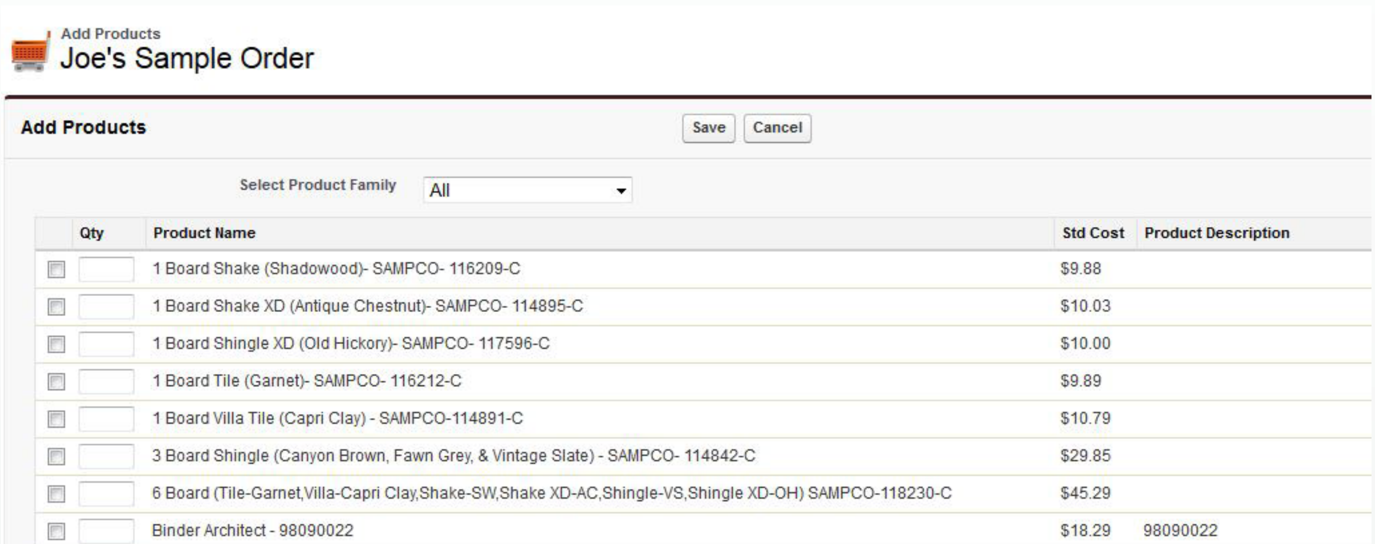
Find the section called PRODUCT REQUEST on the MMO. To start adding products, click the ADD PRODUCTS button.

DECRA ROOFING SYSTEMS

MMO Form

First, pick the family of products you want to chose from, or pick all products:

All - All products in DECRA's MMO library
Giveaways - Counter Pads, Hats, Shirts
Literature - Brochures, Flyers, Install Guides
Panels - Production - Full panels and vents
Promotional Materials - Binders, DVDs, Job Signs
Samples & Displays - Boards and sets, Sample sets

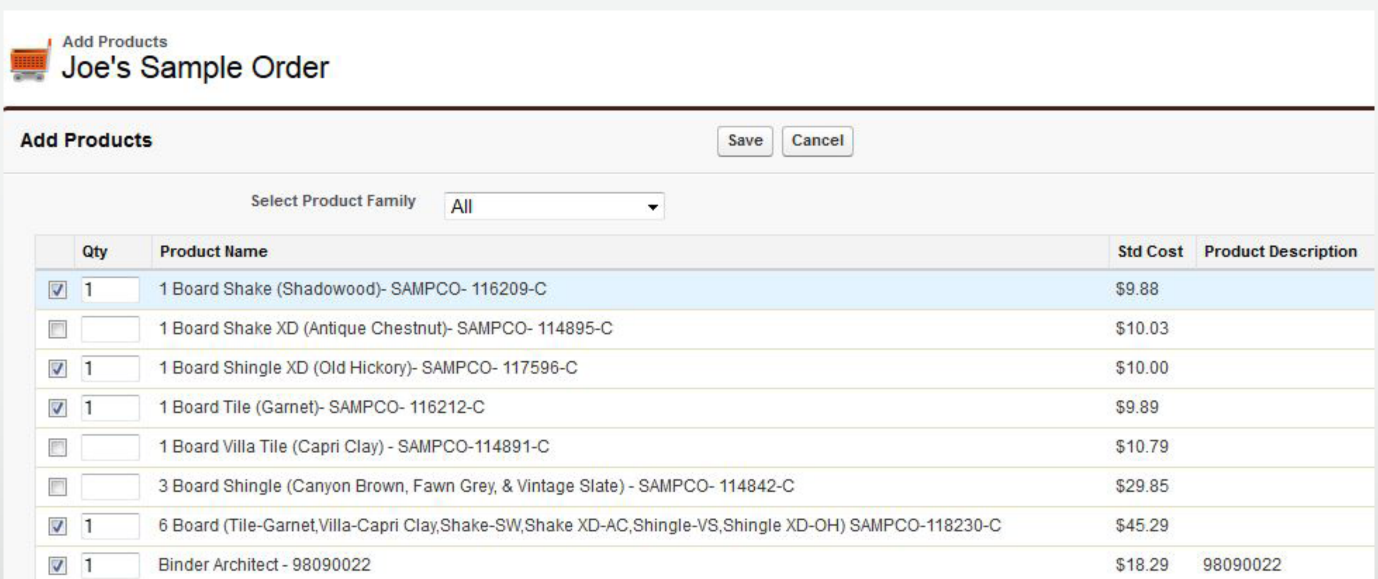

Add Products
Joe's Sample Order

Add Products   Save   Cancel

Select Product Family: All

	Qty	Product Name	Std Cost	Product Description
☐		1 Board Shake (Shadowood)- SAMPCO- 116209-C	$9.88	
☐		1 Board Shake XD (Antique Chestnut)- SAMPCO- 114895-C	$10.03	
☐		1 Board Shingle XD (Old Hickory)- SAMPCO- 117596-C	$10.00	
☐		1 Board Tile (Garnet)- SAMPCO- 116212-C	$9.89	
☐		1 Board Villa Tile (Capri Clay) - SAMPCO-114891-C	$10.79	
☐		3 Board Shingle (Canyon Brown, Fawn Grey, & Vintage Slate) - SAMPCO- 114842-C	$29.85	
☐		6 Board (Tile-Garnet,Villa-Capri Clay,Shake-SW,Shake XD-AC,Shingle-VS,Shingle XD-OH) SAMPCO-118230-C	$45.29	
☐		Binder Architect - 98090022	$18.29	98090022

To add products, click the check box next to QTY, or add your desired quantity in whole numbers to this field. If you chose products from a sub category (example Samples & Displays), save after each addition.

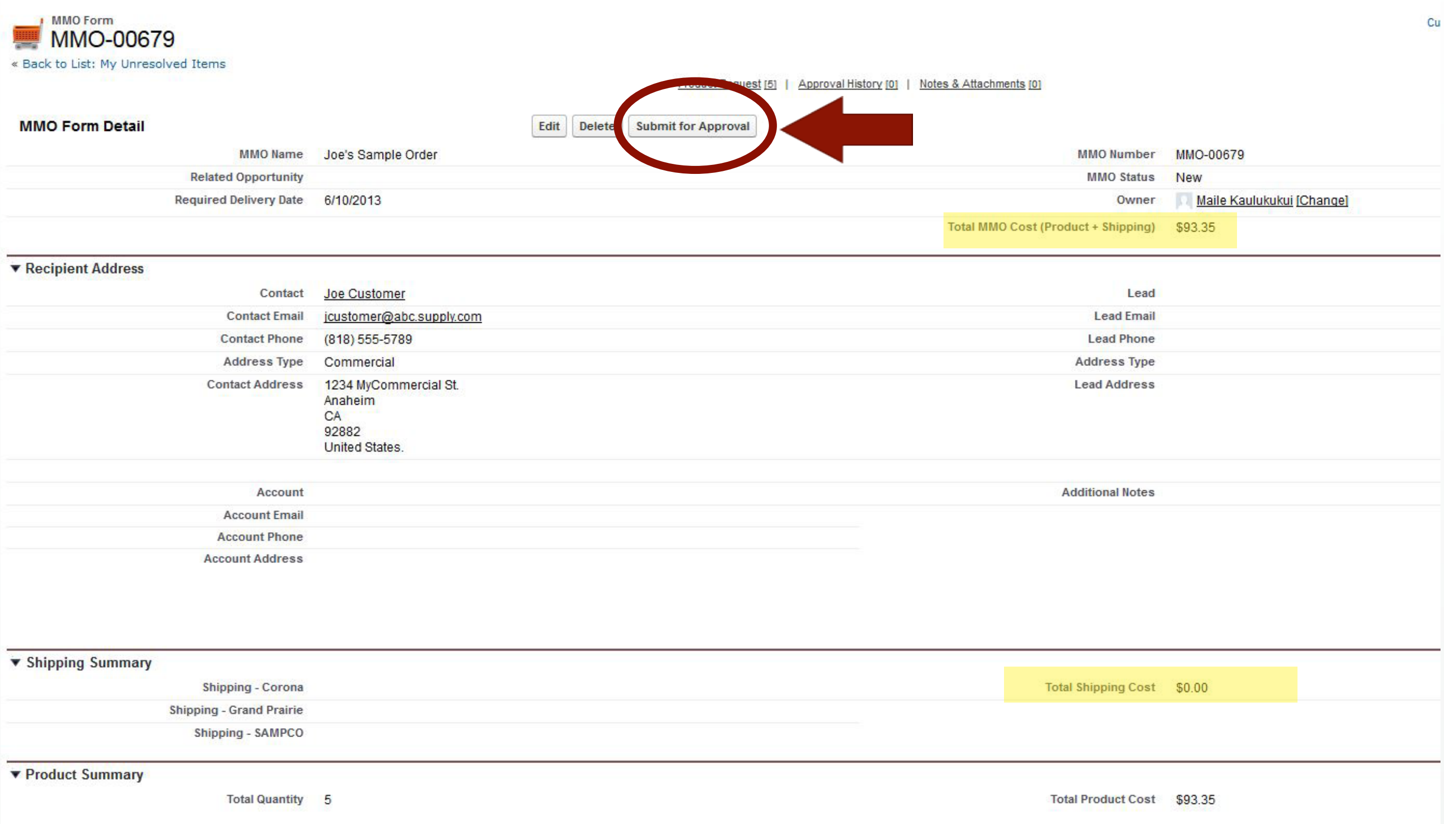

Add Products
Joe's Sample Order

Add Products   Save   Cancel

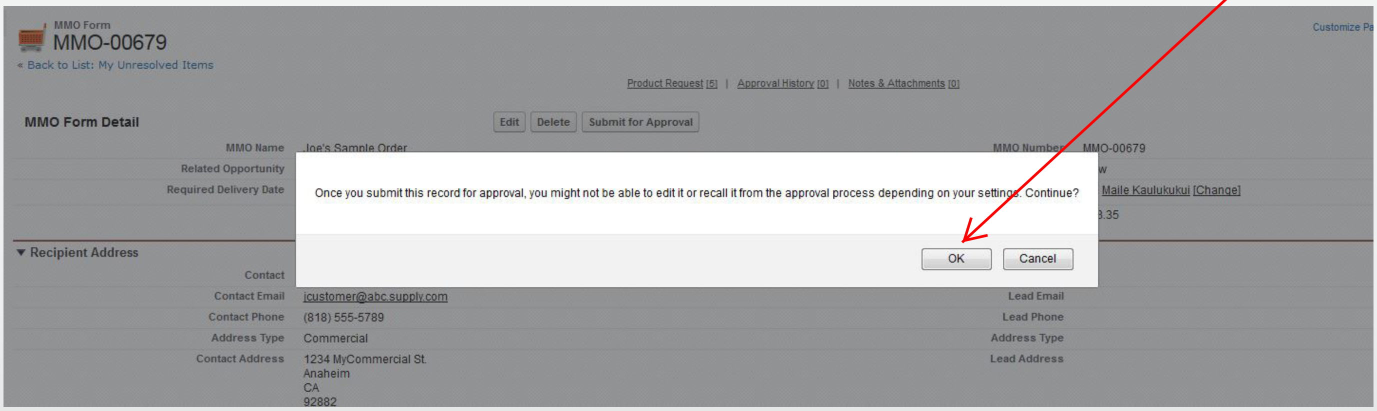
Select Product Family: All

	Qty	Product Name	Std Cost	Product Description
☑	1	1 Board Shake (Shadowood)- SAMPCO- 116209-C	$9.88	
☐		1 Board Shake XD (Antique Chestnut)- SAMPCO- 114895-C	$10.03	
☑	1	1 Board Shingle XD (Old Hickory)- SAMPCO- 117596-C	$10.00	
☑	1	1 Board Tile (Garnet)- SAMPCO- 116212-C	$9.89	
☐		1 Board Villa Tile (Capri Clay) - SAMPCO-114891-C	$10.79	
☐		3 Board Shingle (Canyon Brown, Fawn Grey, & Vintage Slate) - SAMPCO- 114842-C	$29.85	
☑	1	6 Board (Tile-Garnet,Villa-Capri Clay,Shake-SW,Shake XD-AC,Shingle-VS,Shingle XD-OH) SAMPCO-118230-C	$45.29	
☑	1	Binder Architect - 98090022	$18.29	98090022

Now, you can see that your products that you chose are in the PRODUCT REQUEST area. Also, the fields TOTAL MMO COST (PRODUCT + SHIPPING) and TOTAL PRODUCT COST fields have been totaled, giving you a value for your order. You can continue to add products to this order, or you can now SUBMIT FOR APPROVAL.



You will get a pop up window to verify if you are ready to submit your record for approval, click OK to proceed.

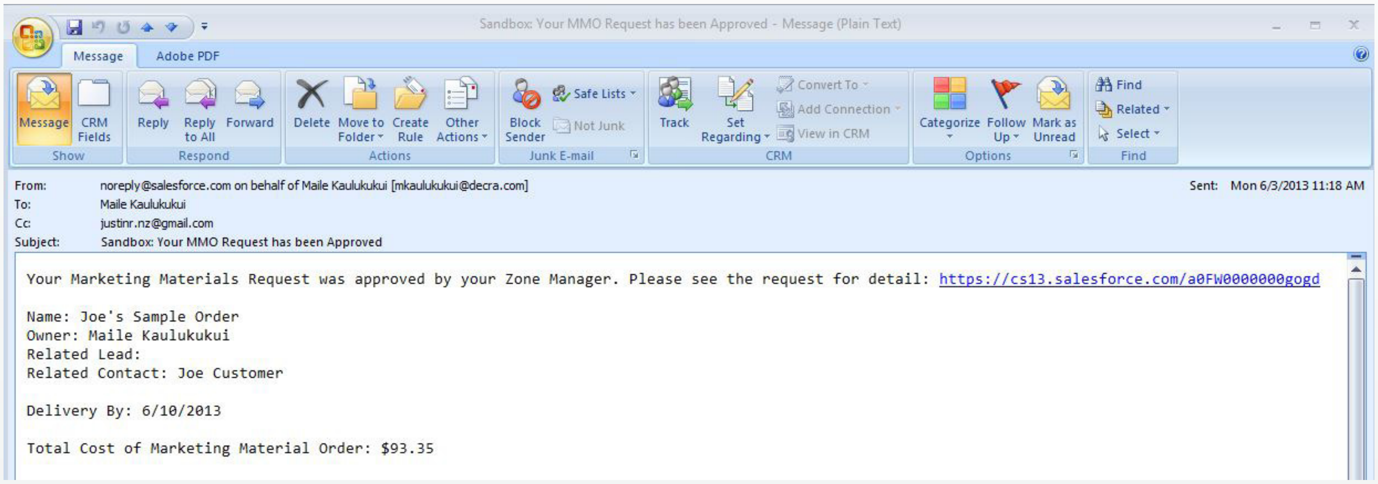


After submitting your order for approval, you can see the status of your order by visiting your MMO and checking the APPROVAL HISTORY section. If the status shows "APPROVED" and is noted in green, your order has been approved and will be processed accordingly.

Approval History — Submit for Approval — Approval History Help

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Approval Request Submitted						Approved
	6/3/2013 11:17 AM	Approved	Maile Kaulukukui	Maile Kaulukukui		
	6/3/2013 11:17 AM	Submitted	Maile Kaulukukui	Maile Kaulukukui		

You will also receive an email alert, letting you know that your request has been approved. You can click through directly (upon log in to salesforce.com) to this MMO from the approval notification.


Sandbox: Your MMO Request has been Approved - Message (Plain Text)

From: noreply@salesforce.com on behalf of Maile Kaulukukui [mkaulukukui@decra.com] Sent: Mon 6/3/2013 11:18 AM
To: Maile Kaulukukui
Cc: justinr.nz@gmail.com
Subject: Sandbox: Your MMO Request has been Approved

Your Marketing Materials Request was approved by your Zone Manager. Please see the request for detail: https://cs13.salesforce.com/a0FW0000000gogd

Name: Joe's Sample Order
Owner: Maile Kaulukukui
Related Lead:
Related Contact: Joe Customer

Delivery By: 6/10/2013

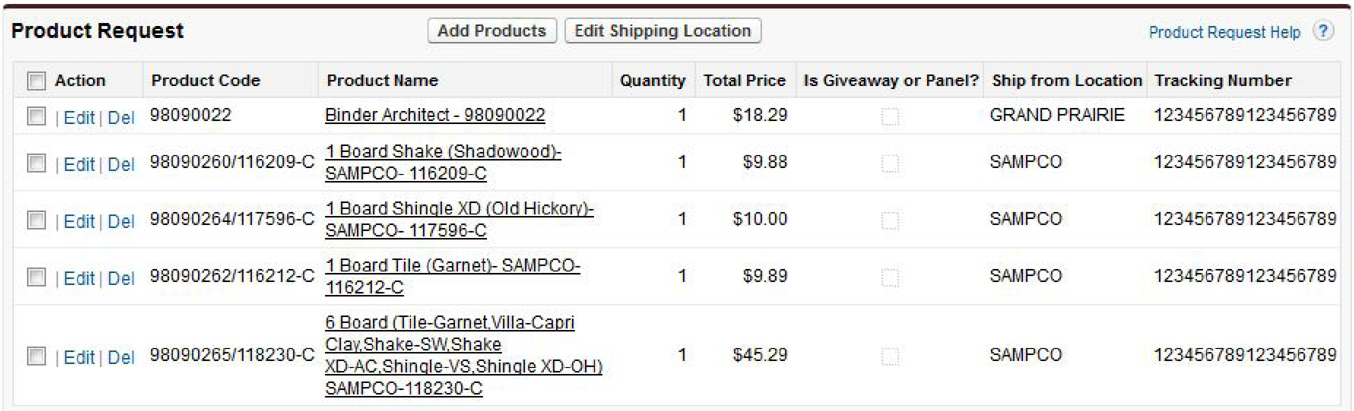
Total Cost of Marketing Material Order: $93.35

Your order will then be assigned to a fulfillment location, based on the products you have chosen. You can see the different ship from locations, once the order has been received by marketing and is in process.

Product Request — Add Products — Edit Shipping Location — Product Request Help

Action	Product Code	Product Name	Quantity	Total Price	Is Giveaway or Panel?	Ship from Location	Tracking Number
Edit | Del	98090022	Binder Architect - 98090022	1	$18.29		GRAND PRAIRIE	
Edit | Del	98090260/116209-C	1 Board Shake (Shadowood)- SAMPCO-116209-C	1	$9.88		SAMPCO	
Edit | Del	98090264/117596-C	1 Board Shingle XD (Old Hickory)-SAMPCO- 117596-C	1	$10.00		SAMPCO	
Edit | Del	98090262/116212-C	1 Board Tile (Garnet)- SAMPCO-116212-C	1	$9.89		SAMPCO	
Edit | Del	98090265/118230-C	6 Board (Tile-Garnet,Villa-Capri Clay,Shake-SW,Shake XD-AC,Shingle-VS,Shingle XD-OH) SAMPCO-118230-C	1	$45.29		SAMPCO	

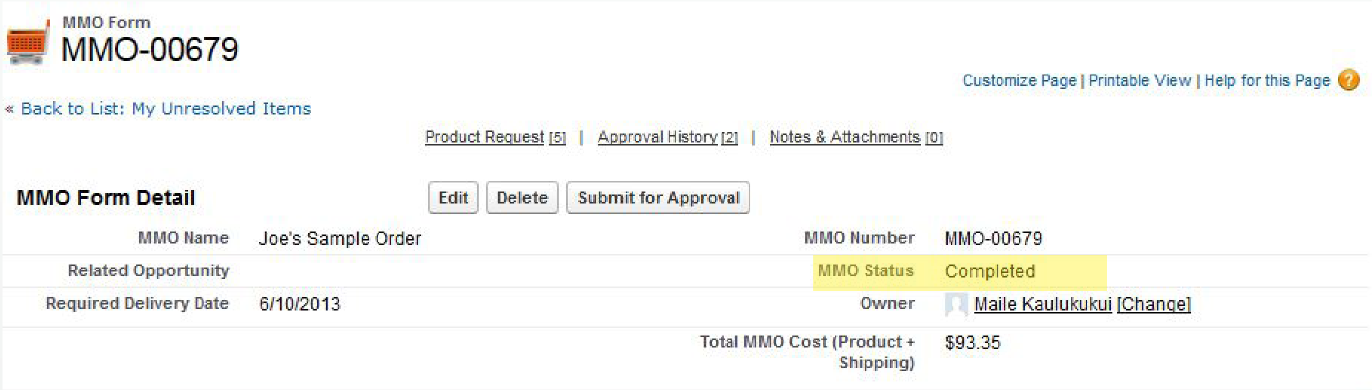
This is also where you will find your individual tracking number for the parts of your order. You can check these by opening the MMO and viewing this section.

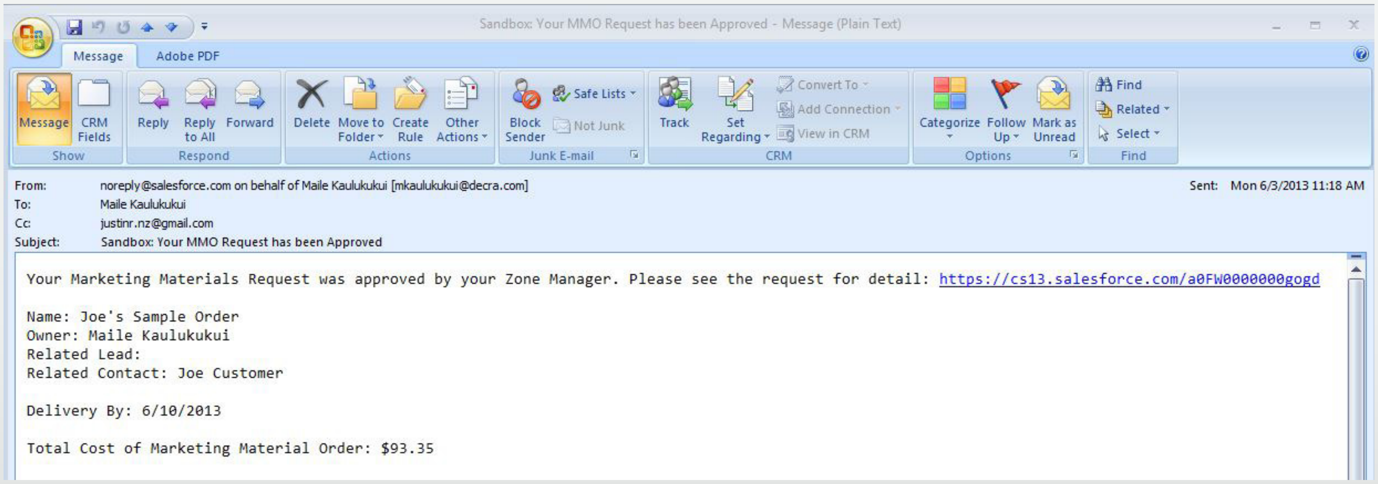


Product Request — Add Products | Edit Shipping Location — Product Request Help

Action	Product Code	Product Name	Quantity	Total Price	Is Giveaway or Panel?	Ship from Location	Tracking Number
Edit | Del	98090022	Binder Architect - 98090022	1	$18.29		GRAND PRAIRIE	123456789123456789
Edit | Del	98090260/116209-C	1 Board Shake (Shadowood)-SAMPCO- 116209-C	1	$9.88		SAMPCO	123456789123456789
Edit | Del	98090264/117596-C	1 Board Shingle XD (Old Hickory)-SAMPCO- 117596-C	1	$10.00		SAMPCO	123456789123456789
Edit | Del	98090262/116212-C	1 Board Tile (Garnet)- SAMPCO-116212-C	1	$9.89		SAMPCO	123456789123456789
Edit | Del	98090265/118230-C	6 Board (Tile-Garnet,Villa-Capri Clay,Shake-SW,Shake XD-AC,Shingle-VS,Shingle XD-OH) SAMPCO-118230-C	1	$45.29		SAMPCO	123456789123456789

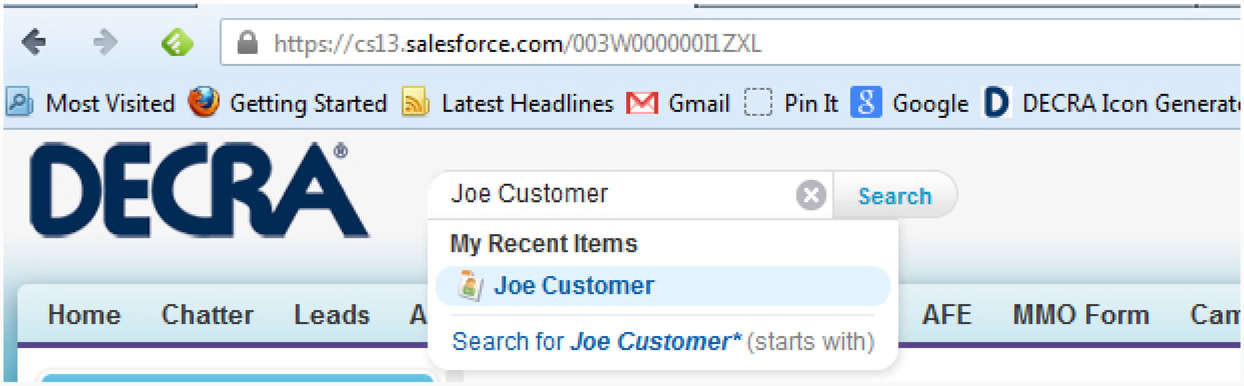
Once your order has been processed and shipped from each ship from location, your order will be closed out and completed and the field MMO STATUS will change from APPROVED to COMPLETED and you will receive an email notification with tracking numbers



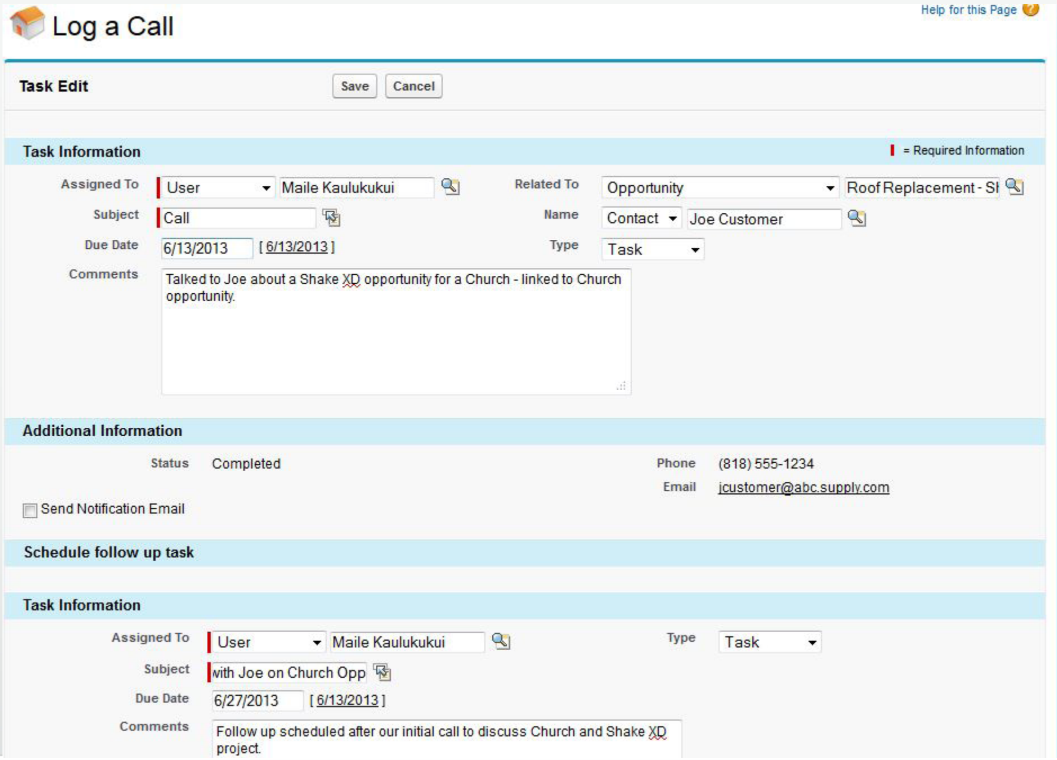


Activities
Log a Call

1. Search for the lead, contact, or person account that you want to log the call activity to. Use the system search bar at the upper left of any screen.
2. Click on the record you want to open.



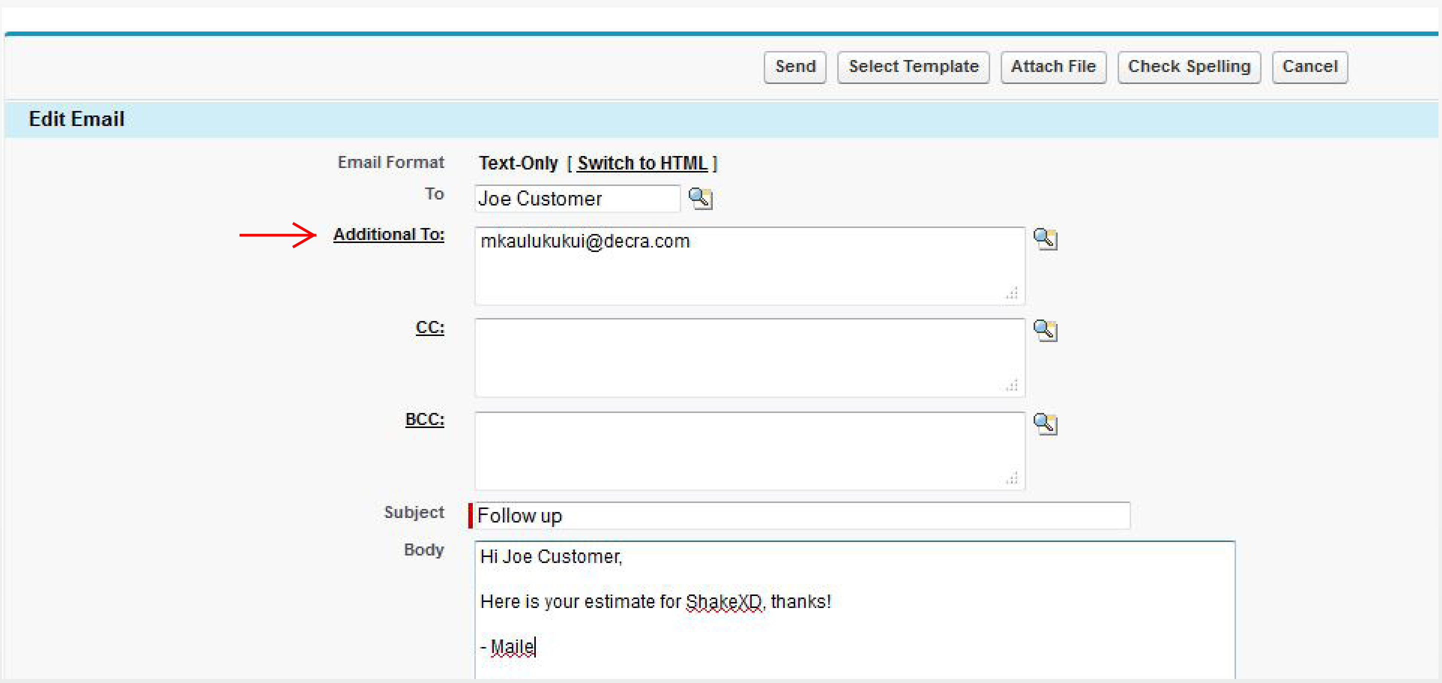
3. In the Activity History, area of the lead or contact, you will find the “Log a Call” button. Click this to open a new call.
4. Fill out the log a call form, documenting what was discussed.
5. If there is an existing opportunity in Salesforce.com, you can also tie this call to that opportunity. Click the look up button to the right of the “Related Opportunity” field to pick the opportunity.
6. You can also schedule a follow up task for yourself, or another user. Fill out the section for follow up task. If no follow up is needed, leave section blank.
7. Click “Save” to save call to contact, lead and/or opportunity.

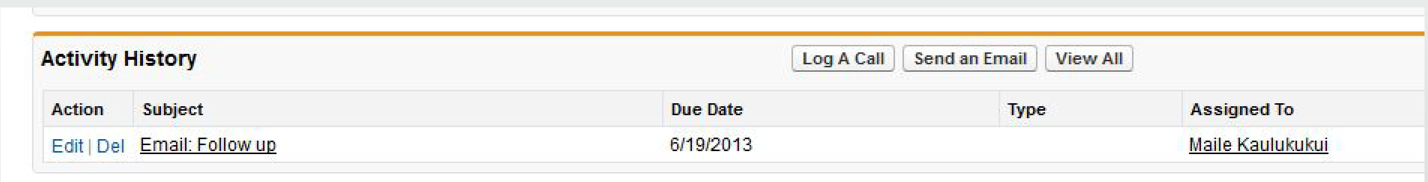


Tracking Emails from Salesforce.com to Outlook

1. First, search for the lead, contact or account that you would like to schedule your meeting with using the search tool, click to open this record.
2. Find the section called “Open Activities” in the lead layout and click “Send Email”. This will open a new email message screen in Salesforce.com.

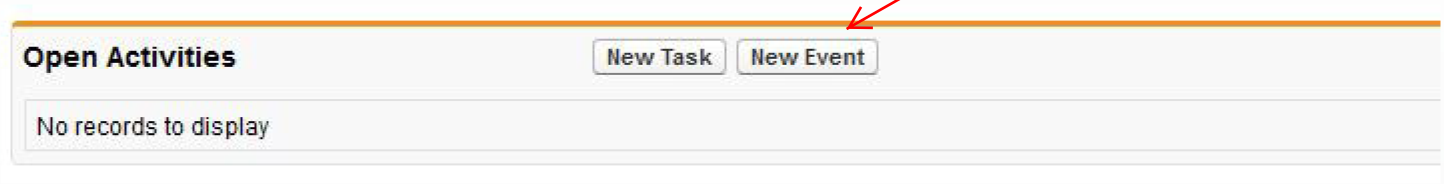
3. Add your own email to the “Additional to” in order to keep a copy in your outlook inbox. This message will be sent to you when you click send.
4. Complete your email message. You can also check your spelling here.
5. When you are done typing your message, click Send to deliver your message.
6. You can find a copy of this message in the lead, contact, or person account’s record, in Activity History



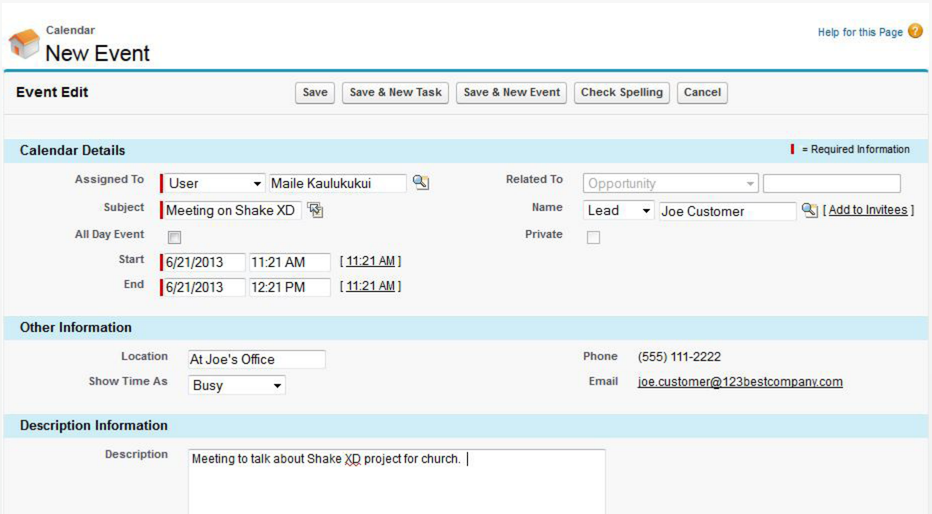


Setting up a meeting in Salesforce.com and adding to your outlook calendar

1. First, search for the lead, contact or account that you would like to schedule your meeting with using the search tool, click to open this record.
2. Find the section called “Open Activities” in the lead layout and click “New Event”. This will open a new calendar event.



3. Begin by giving your event a “subject”, preferably the topic to be discussed at your meeting.
4. Pick a start and end time, location and give your meeting a description.
5. When all necessary information has been filled out, click one of the following options:



6. Once created, this meeting can be found in Open Activities.
7. To add this meeting to your outlook calendar, click on the meeting to open (after you save) and click the button called “Add to Outlook”
8. When you click this, you will be able to open an outlook calendar event and save this to your calendar. You can also invite participants to this meeting using the normal outlook meeting functions.