Activity Management

Process Maps

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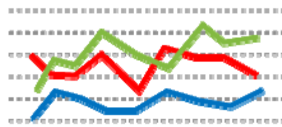
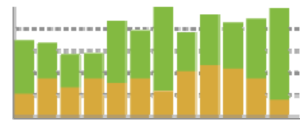
Respond to Calls with Confidence

When you get a call, start by searching Salesforce. You can quickly review the account and see who else at your company has been working with them. You can then use Salesforce to capture call notes and create a follow-up task if need be.

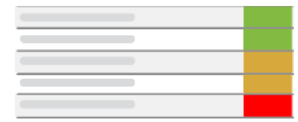


# of Calls

Sales



Customer History



Follow Up Tasks

You Receive an Inbound Call

- Customer has some questions
- Prospect finally calls you back
- A call is transferred to you from a coworker

Search Salesforce

- Last name
- Phone number
- Company name
- Account number
- Email address
- CTI integration

Find Contact

If contact doesn't exist, create a new contact in Salesforce

Review Account Information

- Open tasks
- Activity history
- Opportunity history
- Case history

Take Action

- Update information
- Log call notes
- Create follow-up tasks
- Schedule an event
- Send an email

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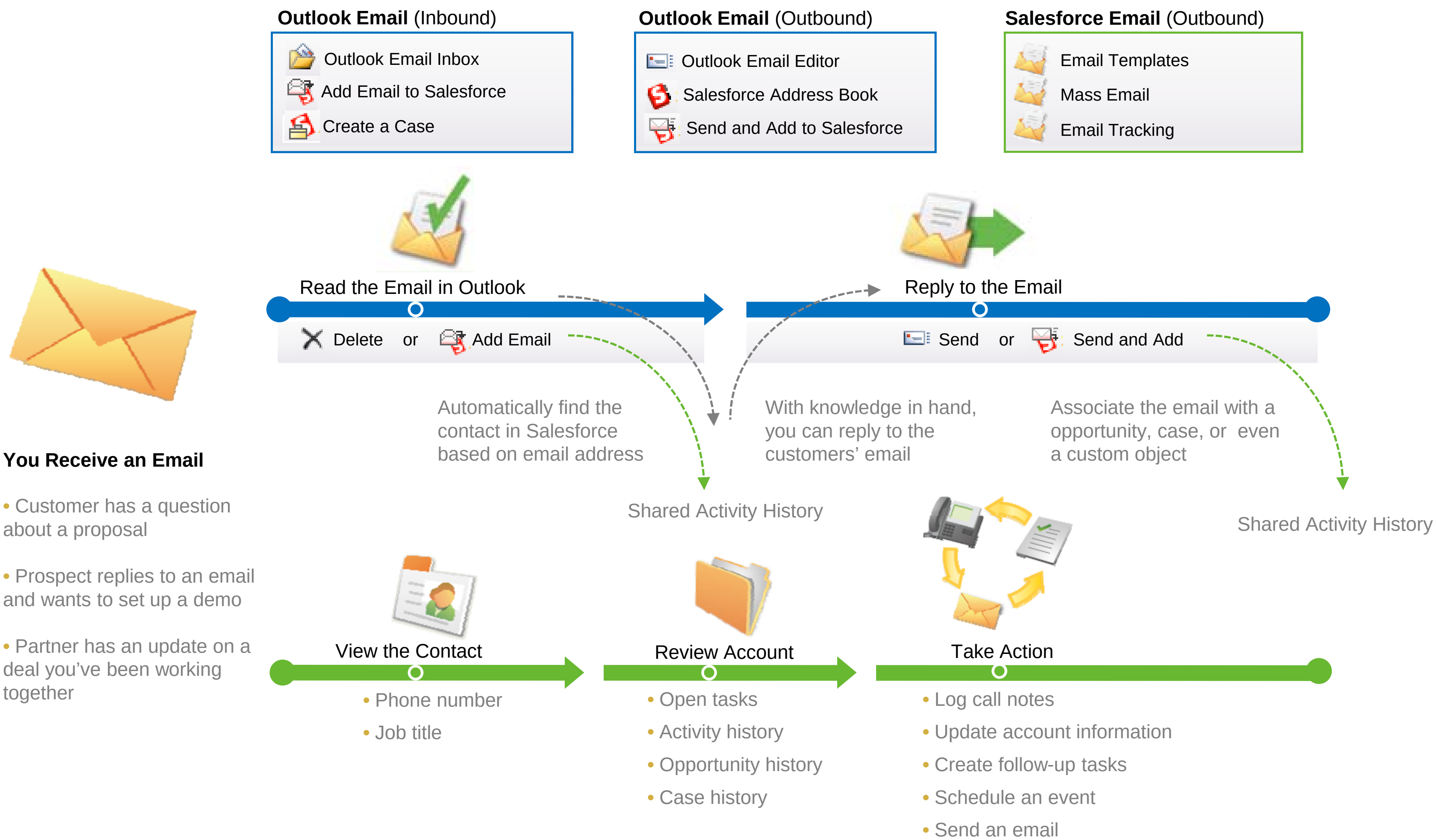
Connect with Outlook and Capture Important Emails

You can use Outlook email to communicate with customers while easily capturing everything in Salesforce at the same time for organization-wide visibility. Add incoming or outgoing Outlook emails to the appropriate record in Salesforce with a single click in Outlook.



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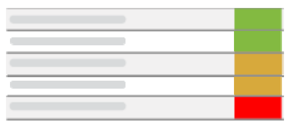
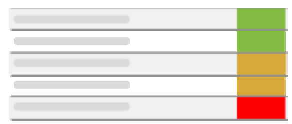
Manage Your Tasks and Follow-Up Activities

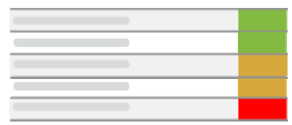
Coordinating customer-facing activities is a critical part of closing business and managing customer relationships. Salesforce's activity management capabilities help keep your team organized and working together so your customers receive the attention they need.



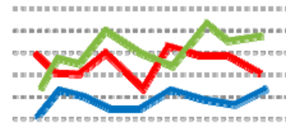
My Prioritized Task List



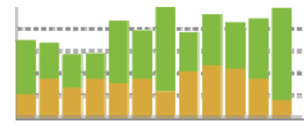
My Top Opportunities



My Top Customers



# of Activities



Sales Trends

Manage Your Task List

- Follow-up reminders you set for yourself
- Tasks assigned to you by a colleague
- Tasks automatically assigned to you based upon a workflow rule or an automatic trigger

Open a Task

- Task description
- Assigned by
- Due date
- Related to

Review the Account

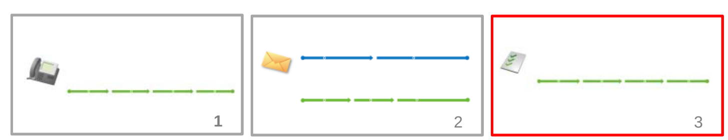
- Open tasks
- Activity history
- Opportunity history
- Case history

View the Contact

- Phone number
- Email address

Take Action

- Log call notes
- Update account information
- Create follow-up tasks
- Schedule an event
- Send an email



Salesforce Tools & Terminology – Activity Management

Below you'll find the tools & terminology used in the application and online training. Professional, Enterprise, and Unlimited Edition customers can re-name standard tabs and fields to reflect their company's terminology. For more information, search Successforce.com.

Accounts

Accounts are your organization's customers, competitors, and partners. Each account stores information such as name, address, and phone numbers. For each account, you can store related information such as opportunities, activities, cases, partners, contracts, and notes.

Contacts

Contacts are all of the individuals associated with your business accounts that you need to track in Salesforce. You can store various information for a contact, such as phone numbers, addresses, titles, and roles in a deal.

Task

Tasks are to-do items that need to be followed up on. They can be associated with accounts, contacts, leads, or other custom objects. You can follow up on the task yourself, or assign it to another user.

Activities

Maintain a historical record of all activities related to an account, contact, or opportunity. Your activity history includes emails, call notes, and calendar events, so everyone is on the same page.

Calendar Events

Group calendaring will helps you better collaborate as a team, and arrange meetings with prospects and customers.

Reports

Reports are lists, summaries, and analyses of your data, which you can display or print. To help you monitor your organization, Salesforce offers a wide range of standard reports, accessible in the Reports tab. You can also create new custom reports to access exactly the information you need. You can subtotal and limit your data to help you analyze trends and get a concise picture of what is happening in your organization.

Dashboards

Dashboards give you a real-time snapshot of corporate metrics and key performance indicators. A dashboard is a group of different charts (or components) that graphically display your custom report data. You can select up to 20 different custom reports to display data graphically as charts in each dashboard.

Search

Make searching data and interacting with the results of your searches simple, smooth, and highly effective. Inline paging and sorting features simplify the task of working with large sets of search results. Powerful filtering and scoping functions narrow searches and results. Customization options enable users to design search results layouts that are tailored for the way they work.

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Connect Outlook

Outlook users enjoy high levels of productivity with Apex Connect Outlook—formerly called Outlook Edition—which makes it easy to synchronize important customer data between two commonly used applications. With Connect Outlook 3.0 in Spring '07, productivity for Outlook users gets another boost with several enhancements. Users can add emails with attachments, create contacts and leads directly in Outlook, and create relationships between calendar events and associated objects such as accounts and opportunities.

Web-to-Lead Form

You can set up a Web-to-Lead form to capture contact me requests from your company's website. With a lead de-dupe solution you can automatically route those requests to the person who owns the account.

CTI Integration

With computer-telephony integration (CTI) capabilities, you can directly integrate your telephone network into Salesforce and access it entirely through the familiar, browser-based Salesforce interface. With the combined power of CTI and the new Salesforce Console, salesforce.com delivers unlimited productivity to your call centers.

Email Templates

With Salesforce you can create email templates for common emails such as web-to-lead responses, sales prospecting, announcements, and internal workflow. You can even personalize parts of the email with information from the contact or account record.

Mass Email

Plan and execute email campaigns targeted at prospects and customers. Enterprise Edition customers can send 500 emails per mass mailing, while Unlimited Edition customers can send 1,000 emails per mass mailing. Salesforce can also integrate with third-party marketing solutions and offers out-of-the-box integration with several top email marketing vendors.

Email Tracking

Evaluate the success of email campaigns with integrated response tracking and easy monitoring of key campaign metrics, such as whether recipients open the messages, when they open them, and more.

Import Wizard

The ability to easily import data into Salesforce is one of the application's key benefits. Import excel worksheets or CSV (comma separated value) files. Map the information to leads, contacts, accounts, solutions, and custom objects. Search Import Tools on Successforce.com for more information.

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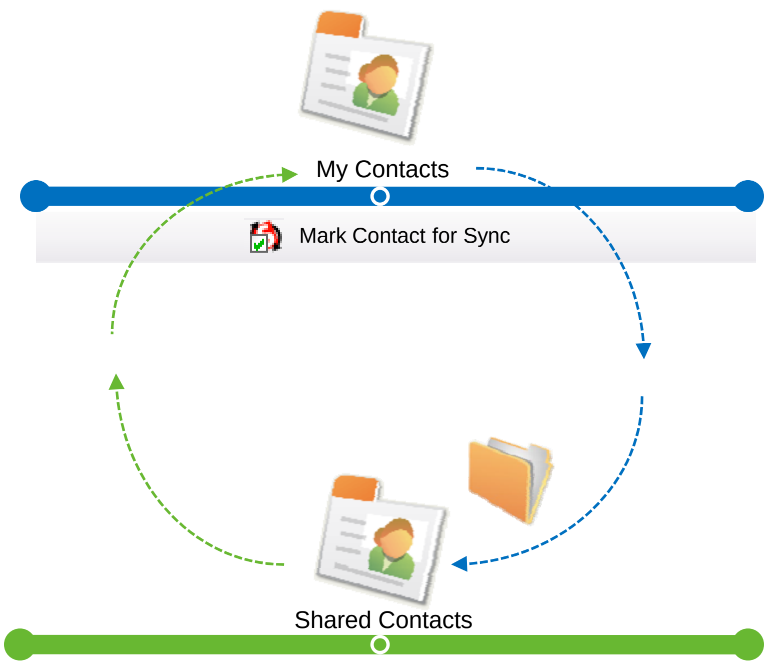
Sync Your Contacts and Calendar Events with Outlook

Salesforce provides synchronization capabilities for Outlook's address book and calendar. Install Force.com Connect for Microsoft Outlook to keep all your contacts and activities up to date in both places.

Outlook Contacts

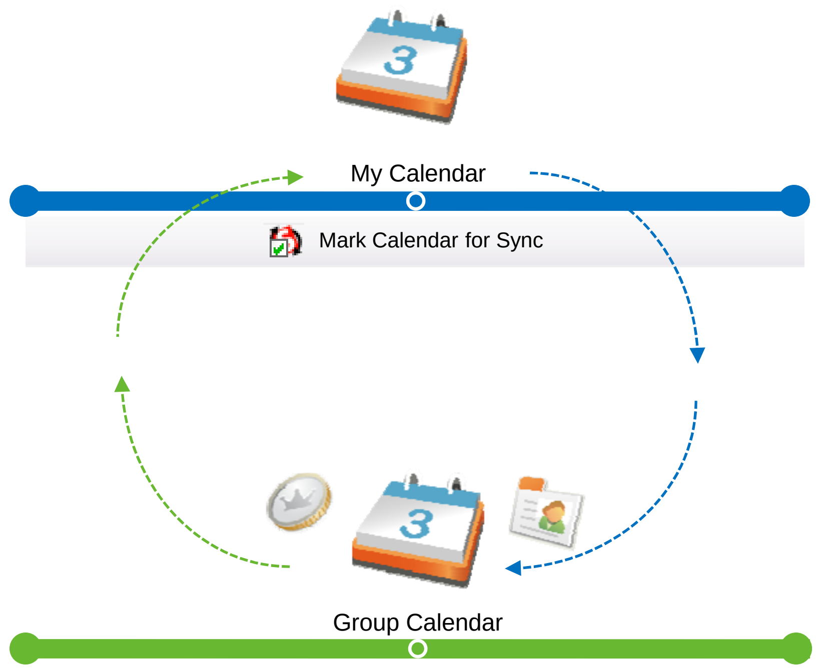
- Mark Contact for Sync
- Unmark Contact for Sync
- Sync with Outlook
- View Contact in Salesforce



Salesforce gives your entire company a 360-degree view of each of your customers, enabling everyone to acquire deep knowledge of every account, facilitate collaboration across your organization, and build and maintain strong, lasting customer relationships.

Outlook Calendar

- Mark Event for Sync
- Mark Event for Sync
- Sync with Outlook
- View Event in Salesforce



Group calendaring helps your employees better collaborate and work together as a team, as well as arrange meetings with prospects and customers more efficiently. For example, a telesales rep who is qualifying a prospect over the phone can at the same time schedule a follow-up meeting for a field sales rep by accessing an individual rep's calendar or the team calendar for all field reps in the region.

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