



Salesforce User Guide

XYZ Company

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1 About This guide

This guide is to be used by Salesforce users of XYX company who have struggled with previous documentation. Previous documentation lacked visuals. This document features relevant, updated visuals of screen captures taken with created test data. The guide explains how to record important data into Salesforce.

Feedback: We welcome any and all feedback related to this new effort.

1.1 Who Should Use It?

This guide is intended for users of different degrees of knowledge and experience with Salesforce.

- Users can learn how to record Contacts, Cases, Accounts, and Chatter Posts.

This guide assumes that you have basic knowledge of Salesforce and its Interface.

1.2 Typographical Conventions

This document uses the following typographical conventions:

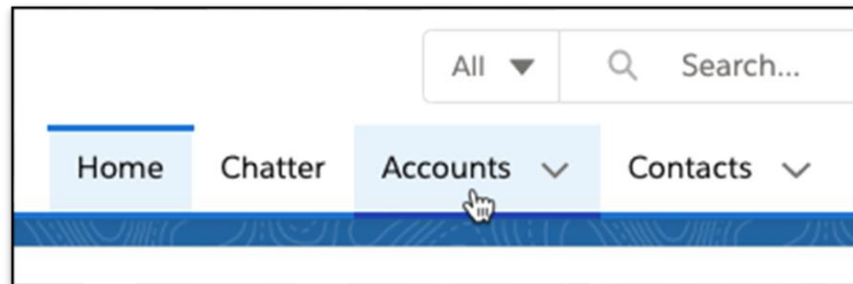
- Buttons, menu items, and all other field names on the Salesforce user interface appear in **bold type**.
- Cross references appear in *italic type*. This includes user-supplied information in text fields or areas.
- Screen output and code samples appear in `monospace type`.

2 Create New Account

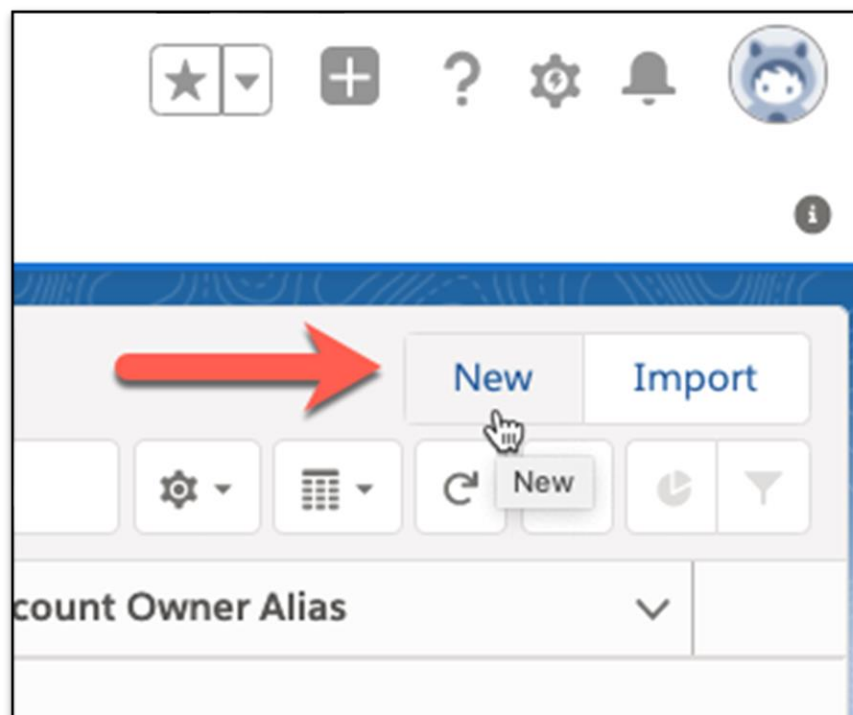
An **Account** in Salesforce means an organization, company, or consumer that you care to track.

To create a new **account**, follow these instructions:

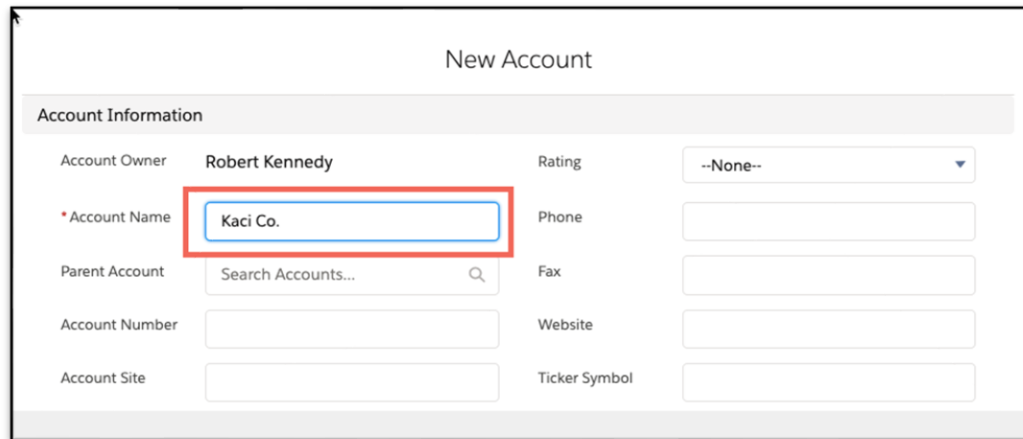
- Click the **Accounts** tab.



- Click **New**.



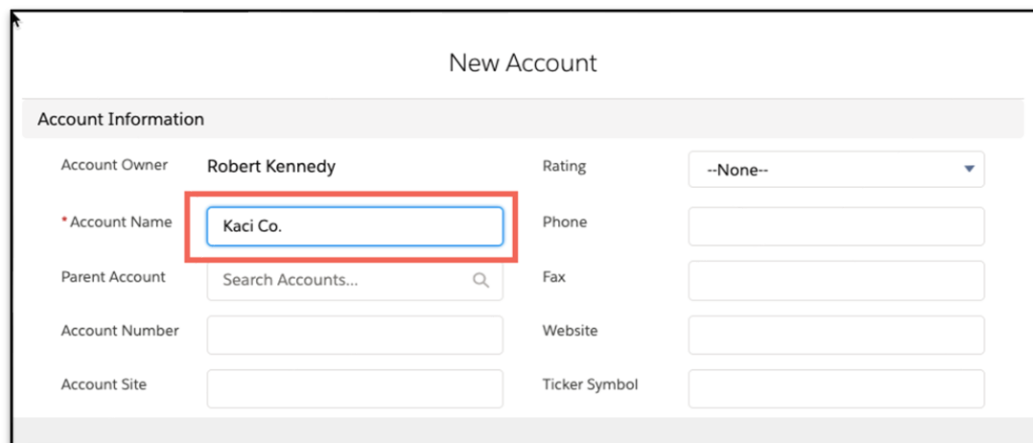
- Enter the **Account Name**.



The screenshot shows a web form titled "New Account". Below the title is a section header "Account Information". The form contains several fields arranged in two columns. In the first row, "Account Owner" is "Robert Kennedy" and "Rating" is a dropdown menu set to "--None--". In the second row, the "* Account Name" field contains "Kaci Co." and is highlighted with a red rectangle. The "Phone" field is empty. In the third row, "Parent Account" is a search field with the text "Search Accounts..." and a magnifying glass icon, and the "Fax" field is empty. In the fourth row, both "Account Number" and "Website" fields are empty. In the fifth row, both "Account Site" and "Ticker Symbol" fields are empty.

New Account			
Account Information			
Account Owner	Robert Kennedy	Rating	--None--
* Account Name	Kaci Co.	Phone	
Parent Account	Search Accounts...	Fax	
Account Number		Website	
Account Site		Ticker Symbol	

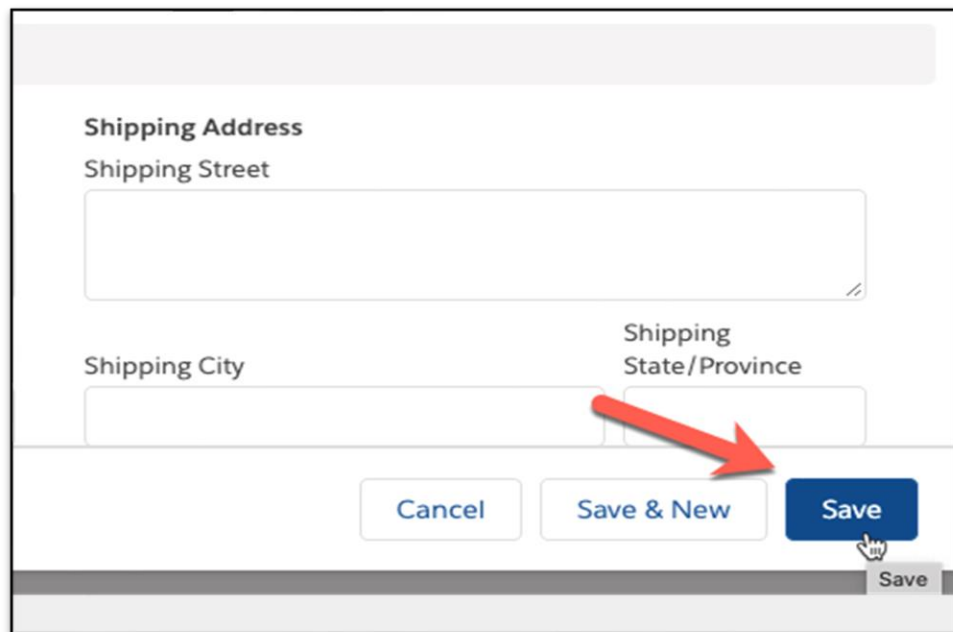
- Enter all the information you have about the company.



This screenshot is identical to the one above, showing the "New Account" form. The "Account Name" field, which contains "Kaci Co.", is highlighted with a red rectangle. All other fields and their values remain the same as in the previous image.

New Account			
Account Information			
Account Owner	Robert Kennedy	Rating	--None--
* Account Name	Kaci Co.	Phone	
Parent Account	Search Accounts...	Fax	
Account Number		Website	
Account Site		Ticker Symbol	

- Click **Save**.



The screenshot shows a web form for entering a shipping address. The form is titled "Shipping Address" and contains three input fields: "Shipping Street", "Shipping City", and "Shipping State/Province". Below the input fields are three buttons: "Cancel", "Save & New", and "Save". A red arrow points from the "Save & New" button to the "Save" button. A mouse cursor is hovering over the "Save" button, and a small "Save" label is visible below it.

Shipping Address

Shipping Street

Shipping City

Shipping State/Province

Cancel Save & New Save

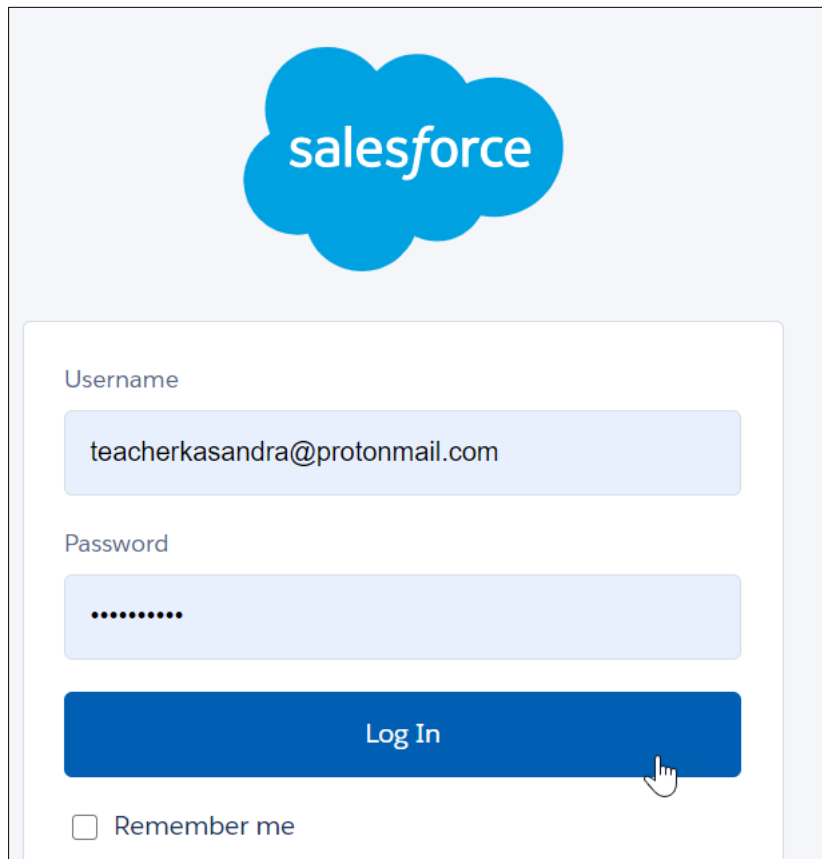
Save

3 Create a Contact

Contacts in Salesforce list the individuals associated with your accounts.

To create a new contact, follow these instructions:

- Login into your **Salesforce** account.

A screenshot of the Salesforce login page. At the top is the Salesforce logo, a blue cloud with the word "salesforce" in white. Below the logo is a white login box. Inside the box, there is a "Username" label above a text input field containing "teacherkasandra@protonmail.com". Below that is a "Password" label above a password input field with ten dots. A blue "Log In" button is positioned below the password field, with a hand cursor icon pointing at it. At the bottom left of the login box is a checkbox labeled "Remember me".

salesforce

Username

teacherkasandra@protonmail.com

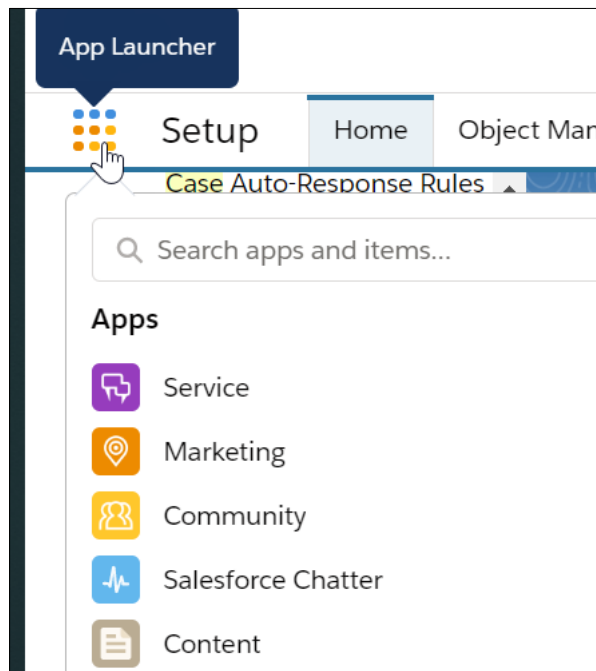
Password

.....

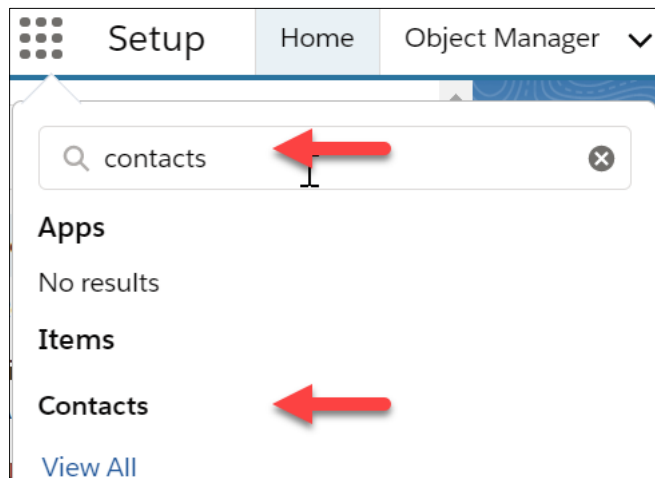
Log In

☐ Remember me

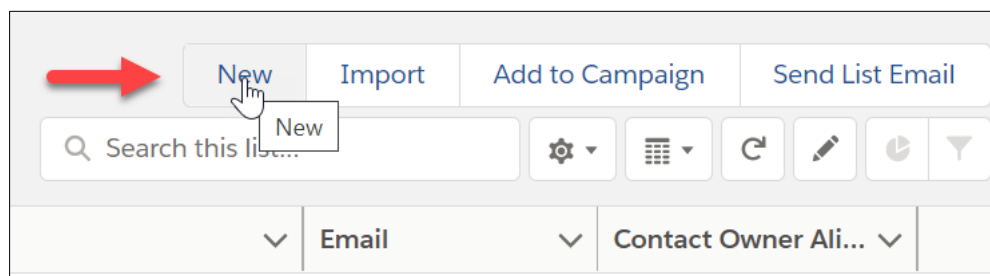
- Click on the **App Launcher** located in the upper-left corner of your screen.



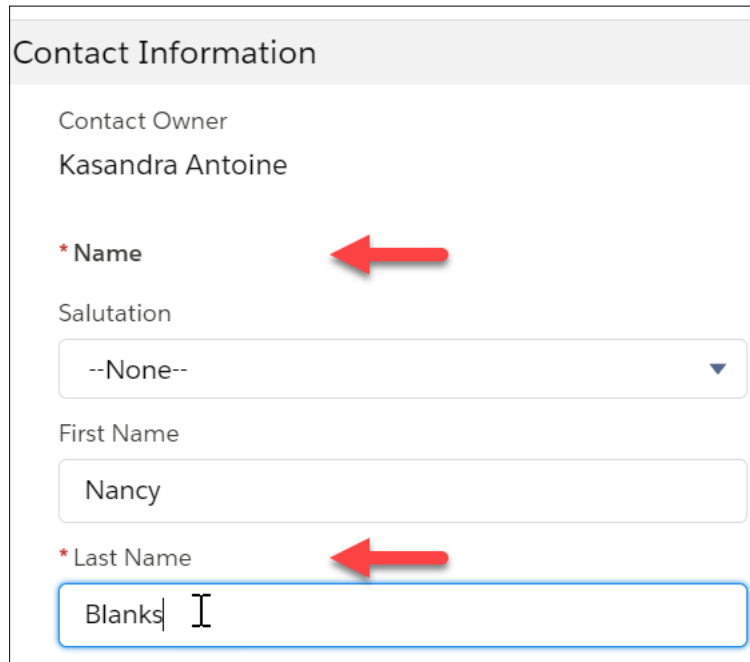
- Search for Contacts**, and click on it.



- Click on the **New** button.



- Enter the required information, **Name** and **Last Name**, into the fields.



Contact Information

Contact Owner
Kasandra Antoine

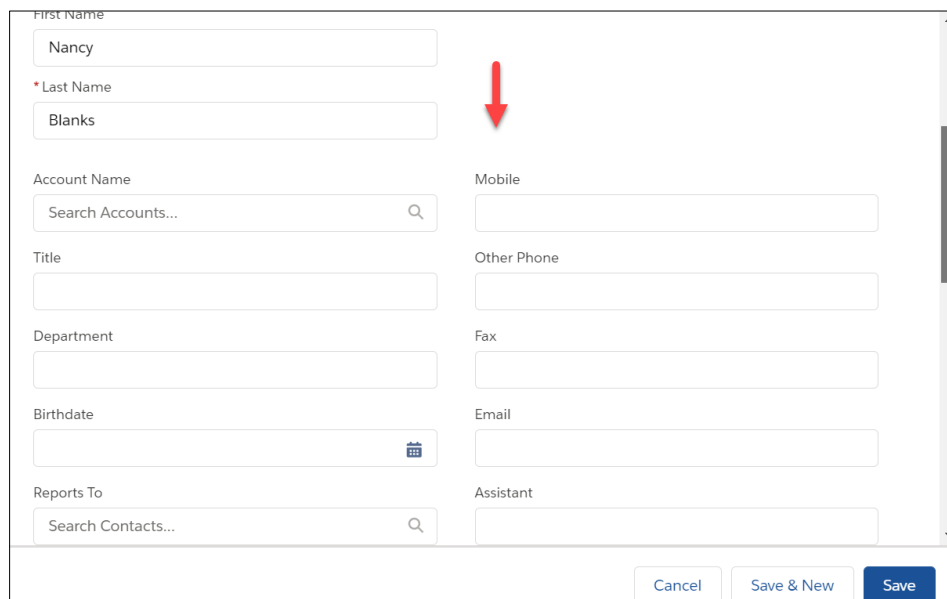
* Name 

Salutation
--None--

First Name
Nancy

* Last Name 
Blanks

- Enter any additional information into the fields.



First Name
Nancy

* Last Name
Blanks 

Account Name
Search Accounts...

Mobile

Title

Other Phone

Department

Fax

Birthdate

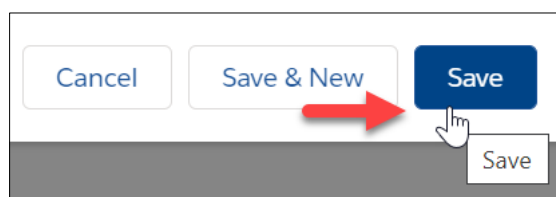
Email

Reports To
Search Contacts...

Assistant

Cancel Save & New Save

- Click the **Save** button found in the bottom right corner of the interface when done.



Cancel Save & New  Save

Save

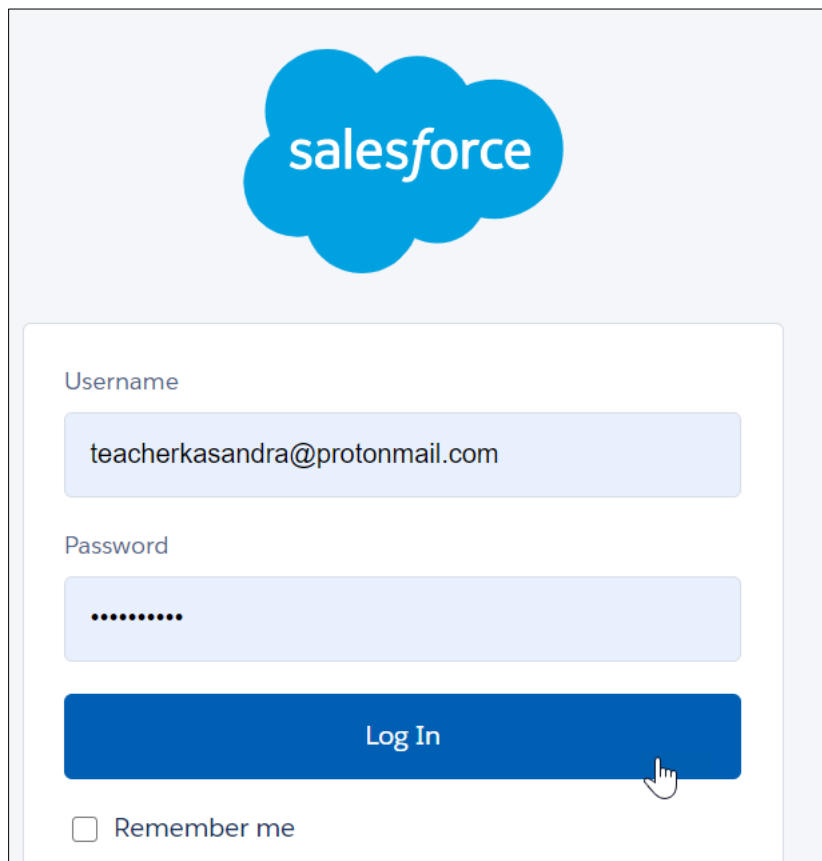
4 Create a Case

Case in Salesforce details customer's question, feedback, or issue. In recording and tracking cases, you gain insight into improving sales and resolving customer issues.

On the **Cases** home page, you can create, locate, and edit cases. You can also sort and filter cases using standard and custom list views.

To create a new **Case**, follow these instructions:

- Login into your **Salesforce account**.

A screenshot of the Salesforce login interface. At the top is the Salesforce logo, a blue cloud with the word "salesforce" in white. Below the logo is a white login box with a light gray border. Inside the box, there are two input fields: "Username" with the email "teacherkasandra@protonmail.com" and "Password" with masked characters ".....". Below these fields is a blue "Log In" button with a white hand cursor icon pointing at it. At the bottom left of the login box is a checkbox labeled "Remember me".

salesforce

Username

teacherkasandra@protonmail.com

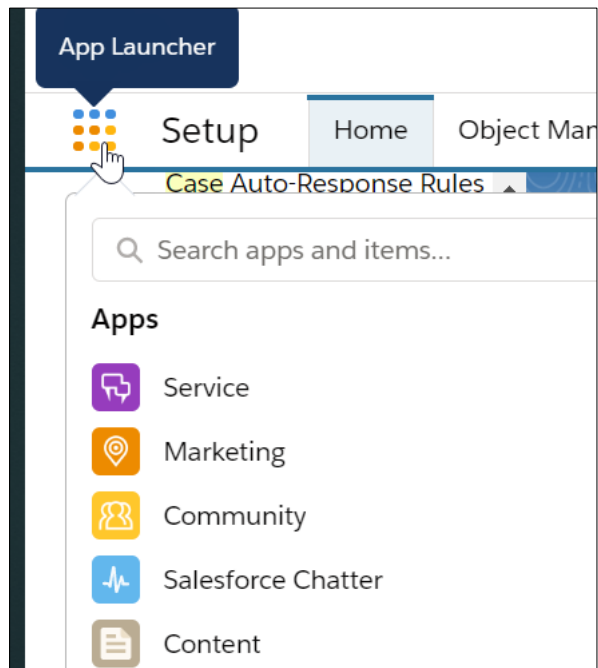
Password

.....

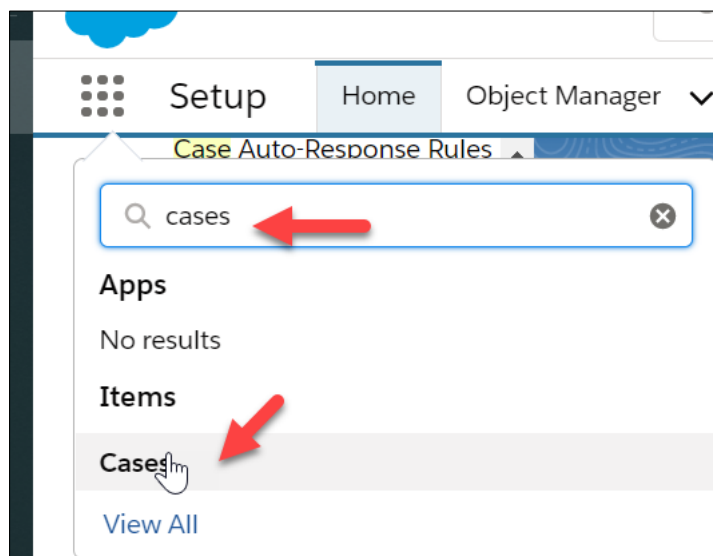
Log In

☐ Remember me

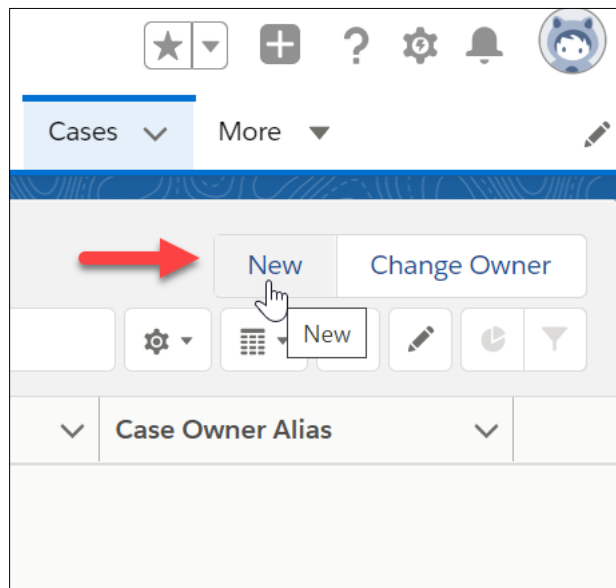
- Click on the **App Launcher**.



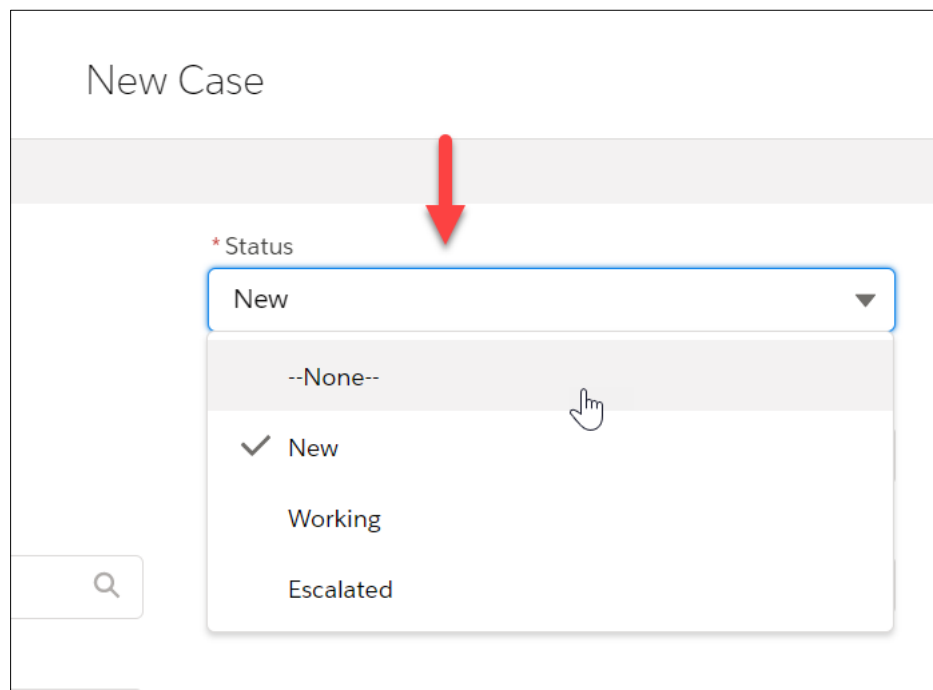
- Search for **Cases** and click on it.



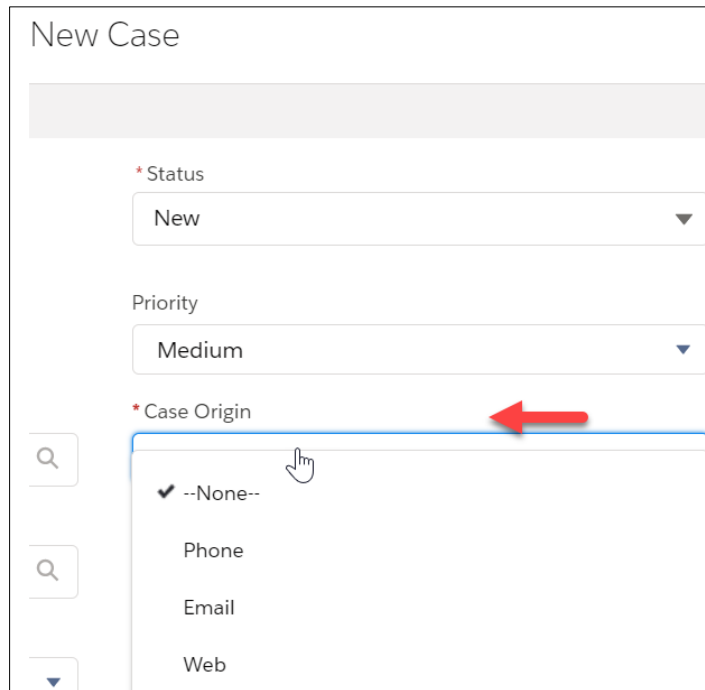
- Navigate to the **New** tab, and click on it.



- Complete the required fields:
 - Click on **Status** and choose from **New**, **Working**, or **Escalated**. Your choice depends on the progress of the customer's specific issue.

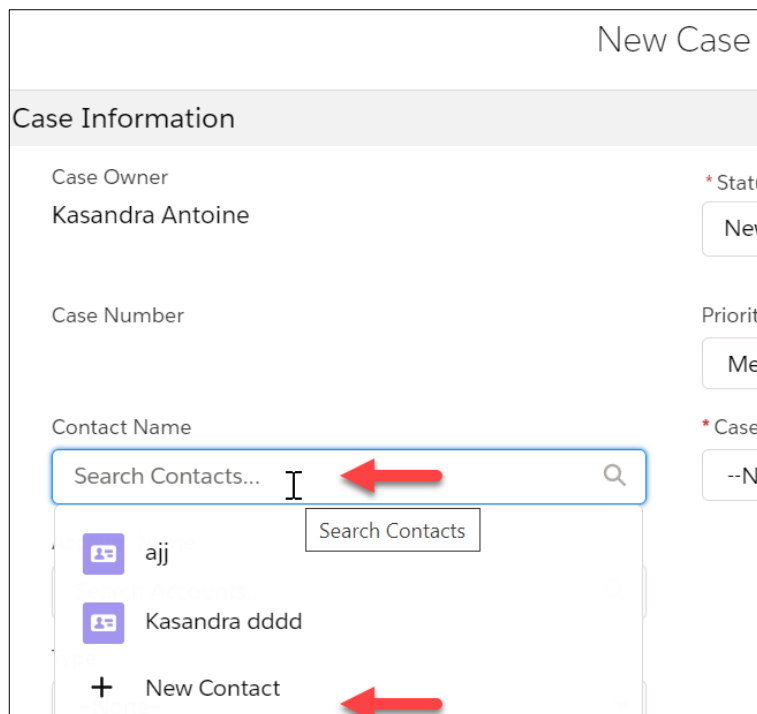


- Click on **Case Origin** and choose from **Phone**, **Email**, and **Web**.



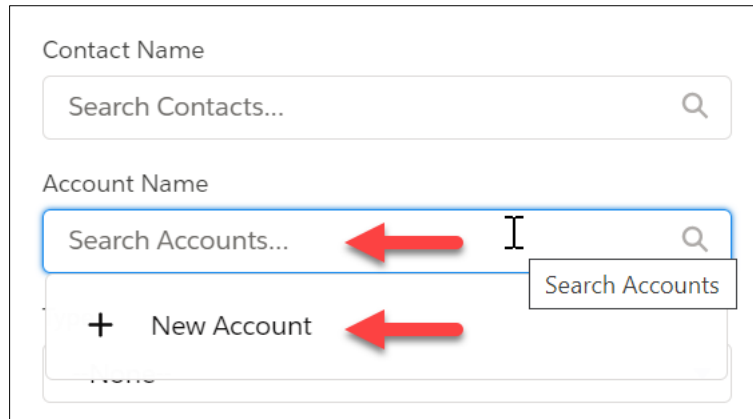
The screenshot shows the 'New Case' form. The 'Status' dropdown is set to 'New' and the 'Priority' dropdown is set to 'Medium'. The 'Case Origin' dropdown is open, showing options: '--None--' (selected with a checkmark), 'Phone', 'Email', and 'Web'. A red arrow points to the 'Case Origin' dropdown header, and a hand cursor is over the '--None--' option.

- Go to the **Contact Name** field box. Search for the **Contact**. (If the contact is not listed, select **New Contact**. Follow directions from 3. *Create a Contact*.)



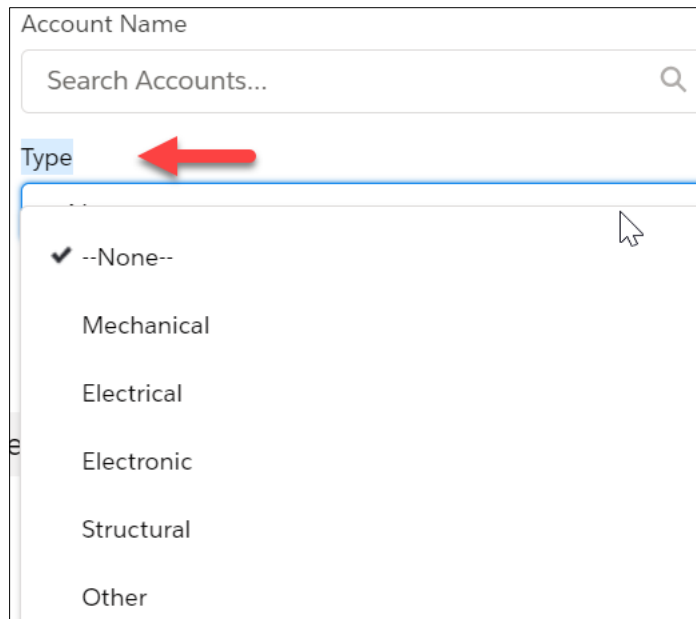
The screenshot shows the 'New Case' form with the 'Case Information' section. The 'Case Owner' is 'Kasandra Antoine' and the 'Case Number' is empty. The 'Contact Name' field is active, showing a search bar with the text 'Search Contacts...' and a magnifying glass icon. A red arrow points to the search bar. Below the search bar, a list of contacts is displayed: 'ajj', 'Kasandra dddd', and '+ New Contact'. A red arrow points to the '+ New Contact' option. A 'Search Contacts' button is also visible.

- Go to the **Account Name** field box. Search for the **Account**. (If the **Account** is not listed, select **New Account**. Follow directions from 2. *Create an Account.*)



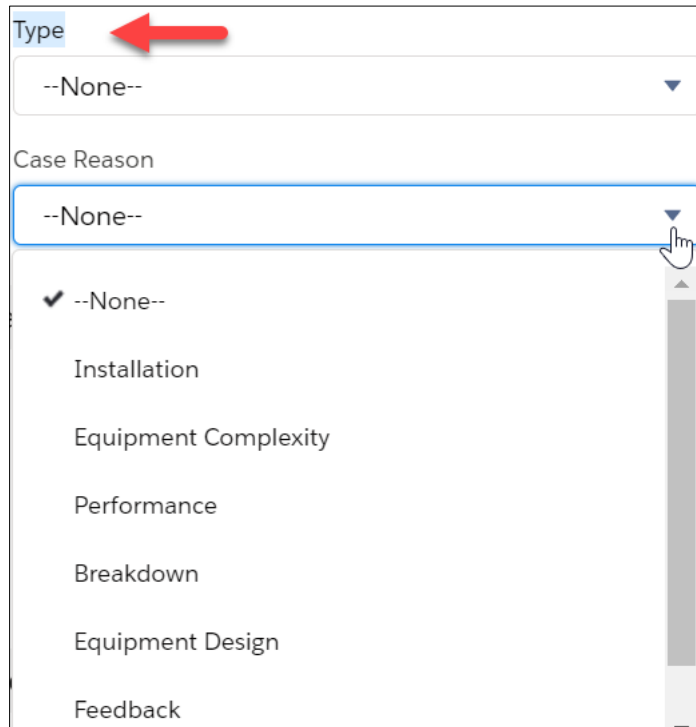
This screenshot shows the 'Account Name' field box. At the top is a search bar labeled 'Search Accounts...' with a magnifying glass icon. Below it is a dropdown menu. The dropdown menu has a red arrow pointing to the search bar and another red arrow pointing to the '+ New Account' option. A 'Search Accounts' button is visible to the right of the dropdown menu.

- Click on **Type**, and select the most relevant option.



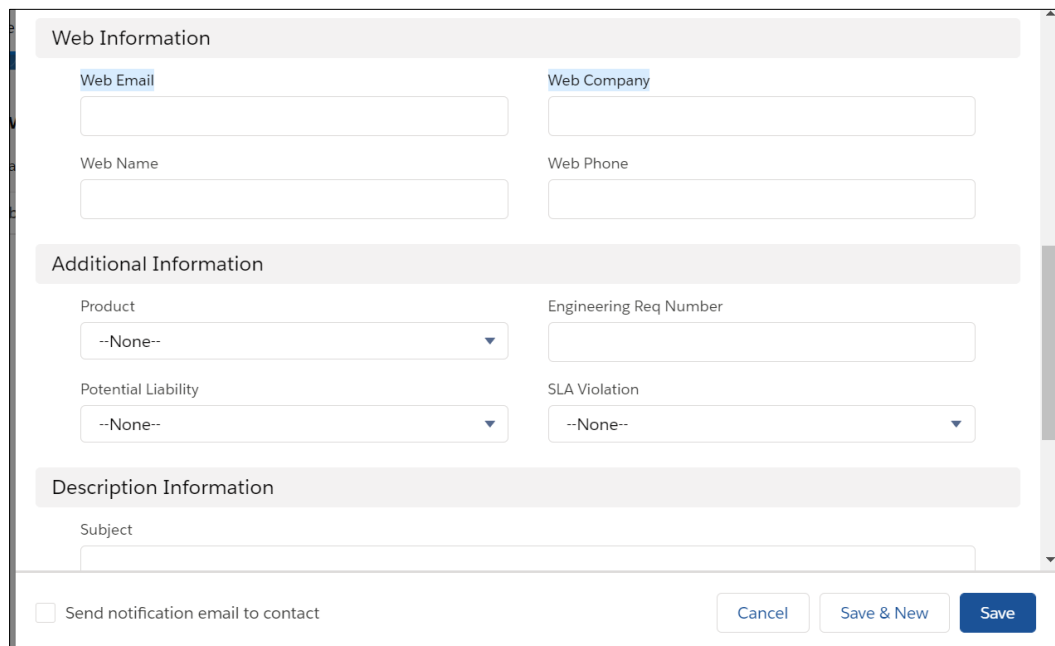
This screenshot shows the 'Type' dropdown menu. The 'Type' label is highlighted with a blue background and a red arrow points to it. The dropdown menu is open, showing a list of options: '--None--' (with a checkmark), 'Mechanical', 'Electrical', 'Electronic', 'Structural', and 'Other'. A mouse cursor is visible over the '--None--' option.

- Click on the **Case Reason**, and select the most relevant option.



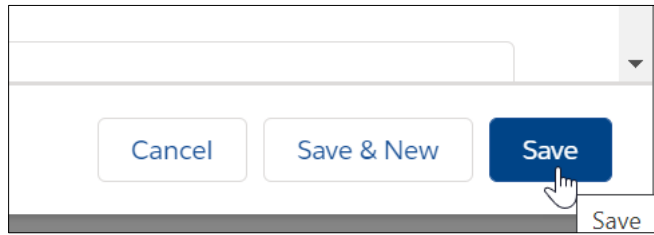
The screenshot shows a dropdown menu for 'Case Reason'. A red arrow points to the 'Type' label above the first dropdown. The 'Case Reason' dropdown is open, showing a list of options: '--None--', 'Installation', 'Equipment Complexity', 'Performance', 'Breakdown', 'Equipment Design', and 'Feedback'. A hand cursor is pointing at the '--None--' option.

- Enter any additional information that you have collected from the customer into the field boxes.



The screenshot shows a form with several sections: 'Web Information' with fields for 'Web Email', 'Web Company', 'Web Name', and 'Web Phone'; 'Additional Information' with dropdowns for 'Product' and 'Potential Liability', and text fields for 'Engineering Req Number' and 'SLA Violation'; and 'Description Information' with a 'Subject' field. At the bottom, there is a checkbox for 'Send notification email to contact' and three buttons: 'Cancel', 'Save & New', and 'Save'.

- Click the **Save** button found in the bottom right corner of the interface when done.

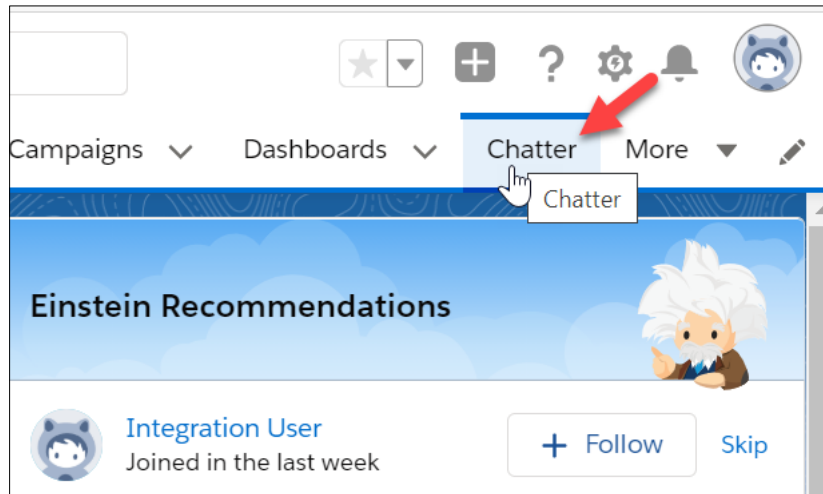


5 Create a Chatter Post

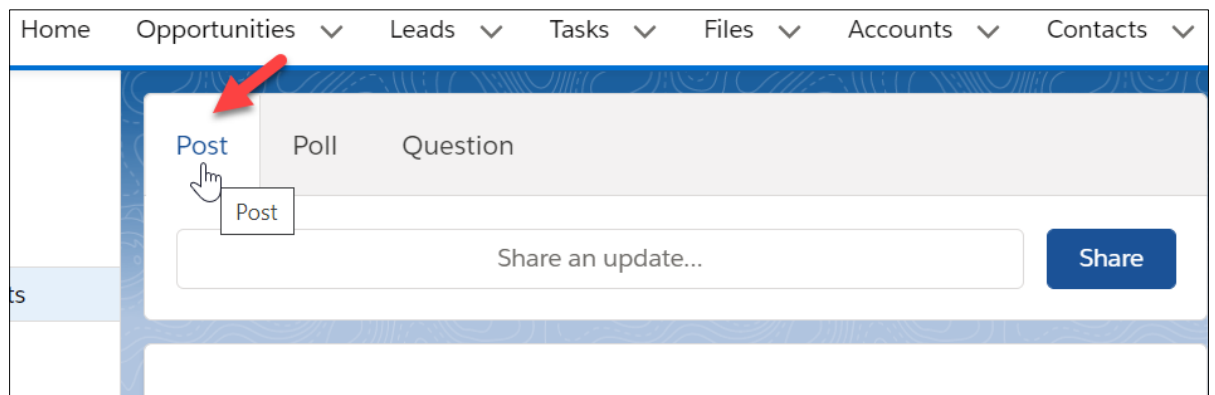
We use **Chatter** publisher to post, comment, ask questions, and create polls. And, you can comment on a post, attach a file or link to your post. Limit posts and comments to 10,000 characters long.

To create a Chatter Post:

- Click on the **Chatter** tab in the top right corner.



- Click on the **Post** tab.



- Start writing your post in the **Post** box.

Post Poll Question

Let's create a I

B I U ~~ABC~~ I_x **☰ ☷** **🖼️ 🔗 😊 👤**

To My Followers

To link to a record, enter / then start typing the record name.

🔗 Saved **Share**

- Use the **Formatting Bar**, below, to change the text format, add images or emojis, or include @mention groups or people.

Let's create a chatter post.

B I U ~~ABC~~ I_x **☰ ☷** **🖼️ 🔗 😊 👤**

To My Followers

To link to a record, enter / then start typing the record name.

🔗 Saved **Share**

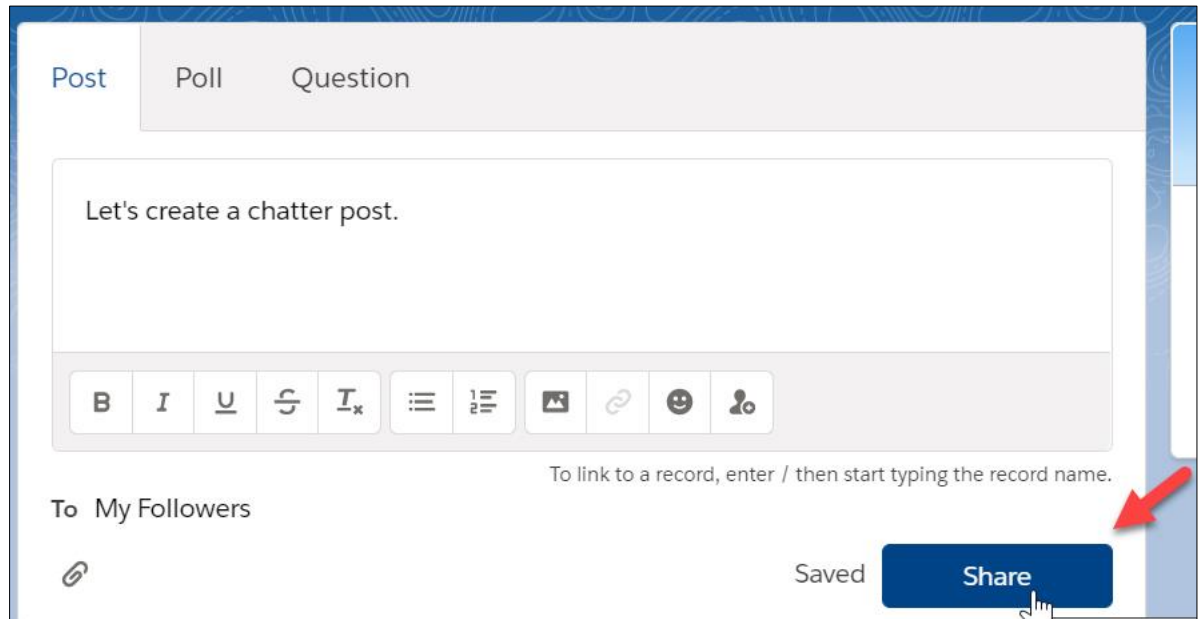
- Use the **Paper Clip** tool to attach up to 10 files.

To My Followers

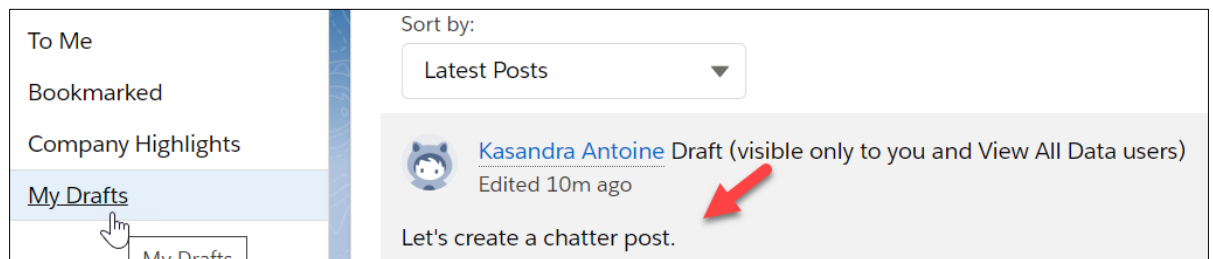
🔗

Attach up to 10 files

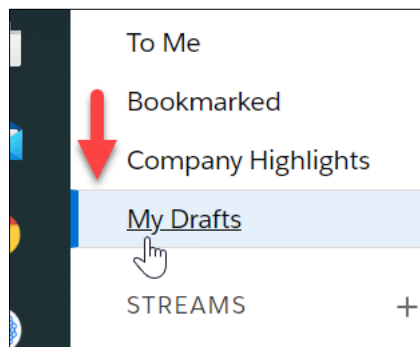
- Select **Share** if you are ready to publish the post.



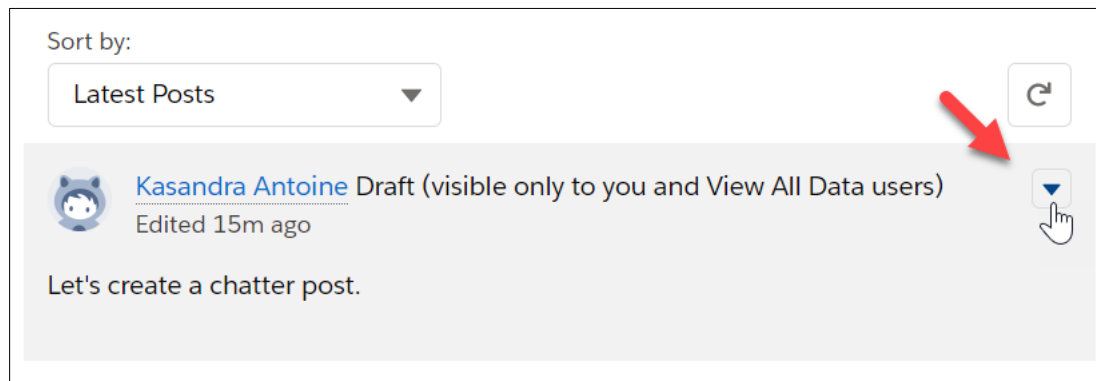
- Or, leave the post for further editing. It will automatically save itself in your **My Drafts** folder.



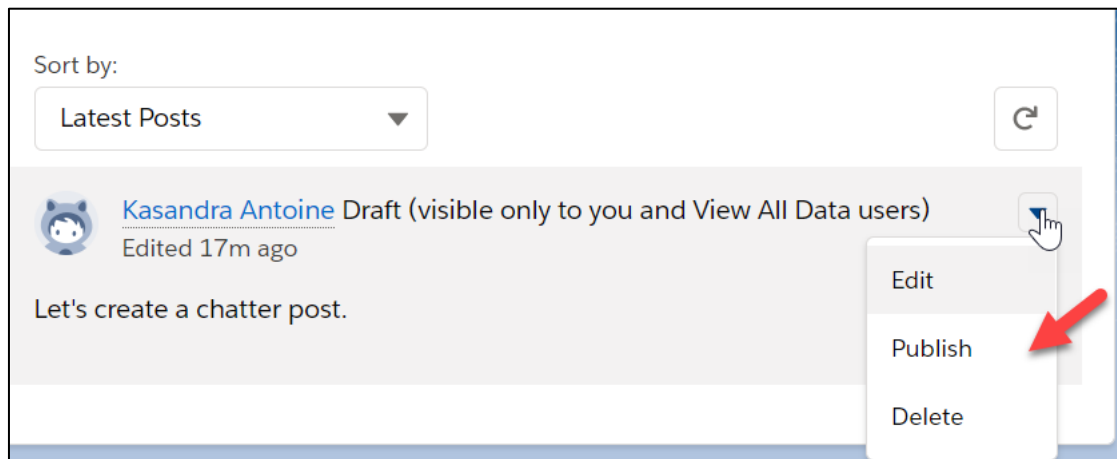
- Click on **My Drafts**, if you did not publish the post earlier.



- Find your post and click on the down arrow, to the right of it.



- Select whether you want to **Edit**, **Delete**, or **Publish** the post.



6 Appendix B – Glossary of Terms

Explain the meaning of all terms used in this document.

Term	Meaning
Contact	The individuals associated with your accounts.
Account	An enterprise, company, or consumer that needs to be tracked.
Case	A record of a customer's feedback, problem, or question. It is vital to track and resolve customers' issues.
Chatter	As an enterprise social network, users collaborate securely at work to establish networks, share files and status updates.
Chatter feed	An interface found in chatter wherein users of the same org can view each other's' profiles, updates, status messages, and more.