
# 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:

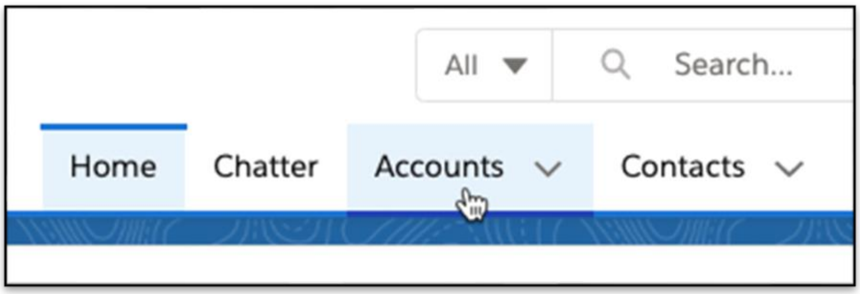
- Buttons, menu items, and all other field names on the Salesforce user interface appear in **bold type**.
- Cross references appear in *italic type*. This includes user-supplied information in text fields or areas.
- Screen output and code samples appear in `monospace type.`

# 2 Create New Account

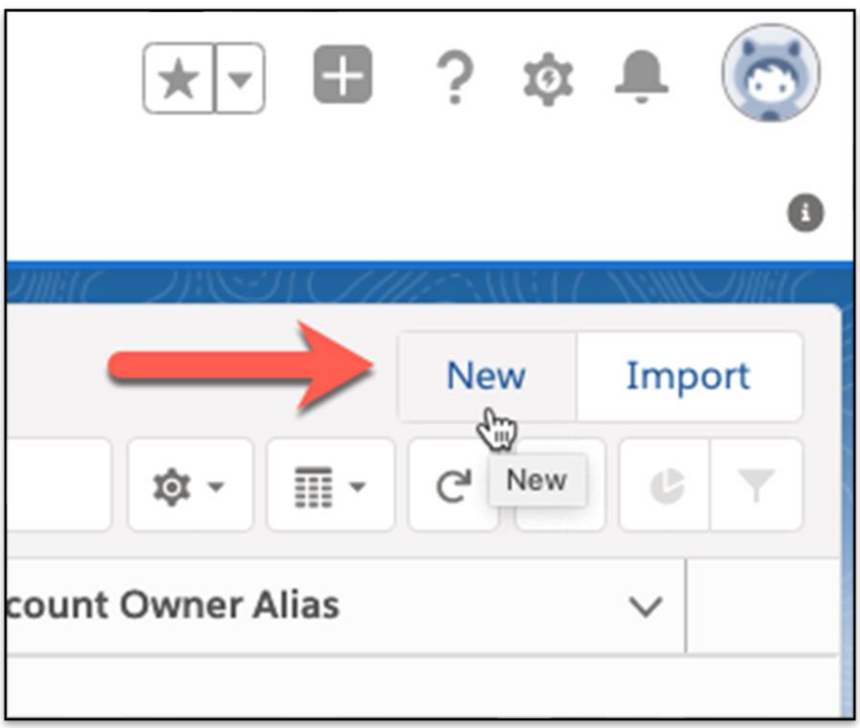
An **Account** in Salesforce means an organization, company, or consumer that you care to track.

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

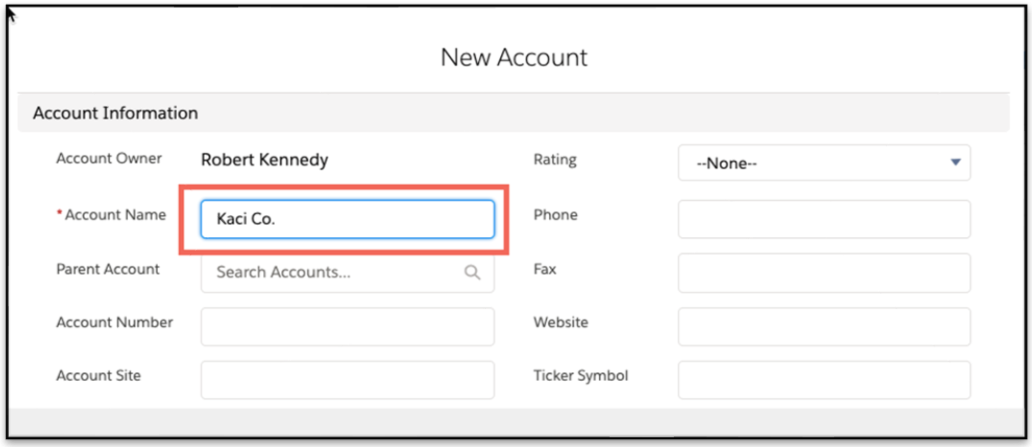
- Click the **Accounts** tab.



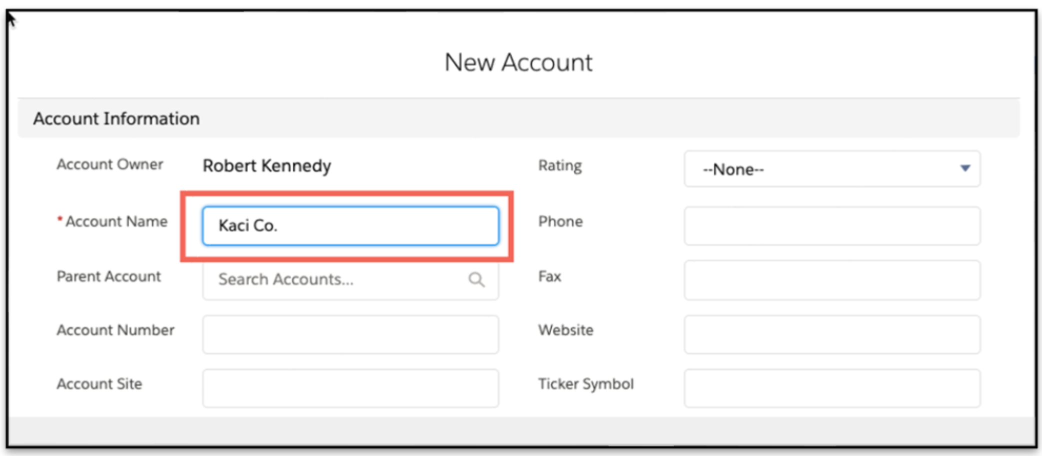

- Click **New**.



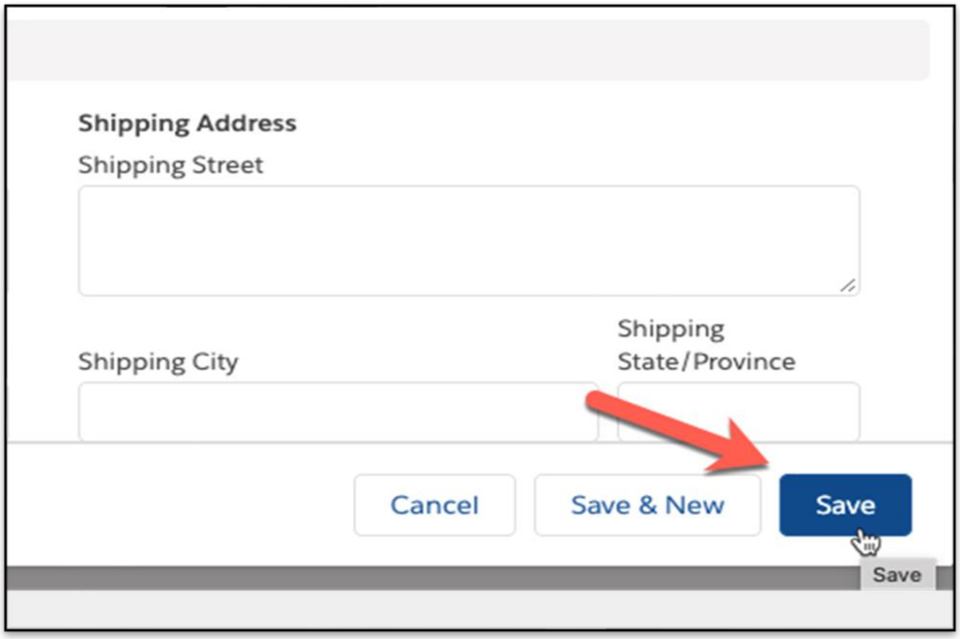
- Enter the **Account Name**.




- Enter all the information you have about the company.



- Click **Save**.

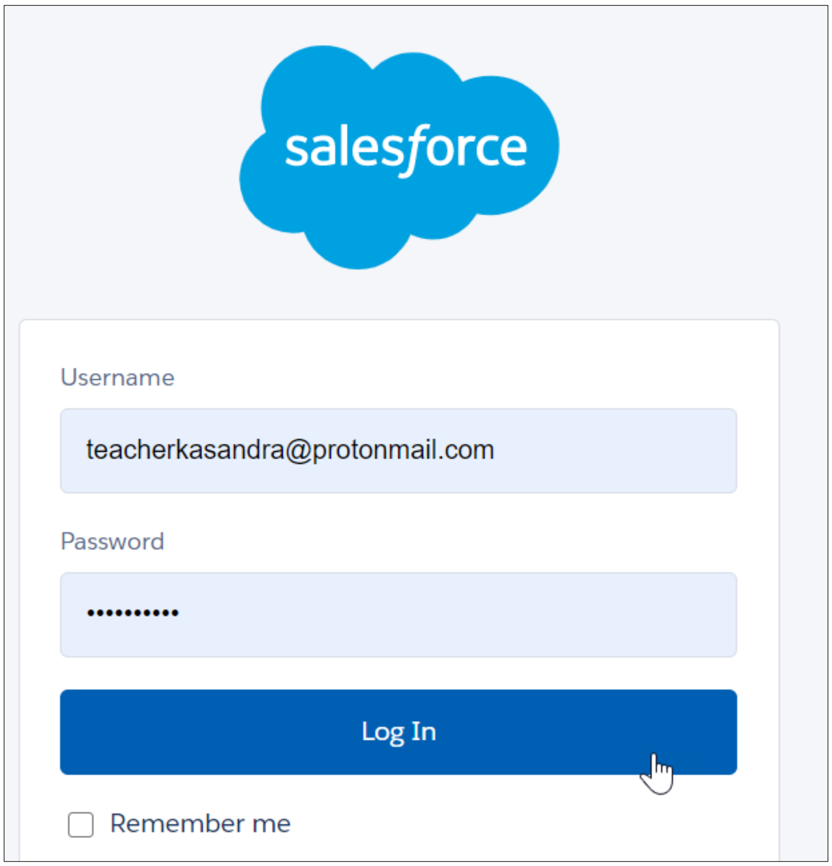

Shipping Address
Shipping Street
Shipping City
Shipping State/Province
Cancel
Save & New
Save
Save

# 3 Create a Contact

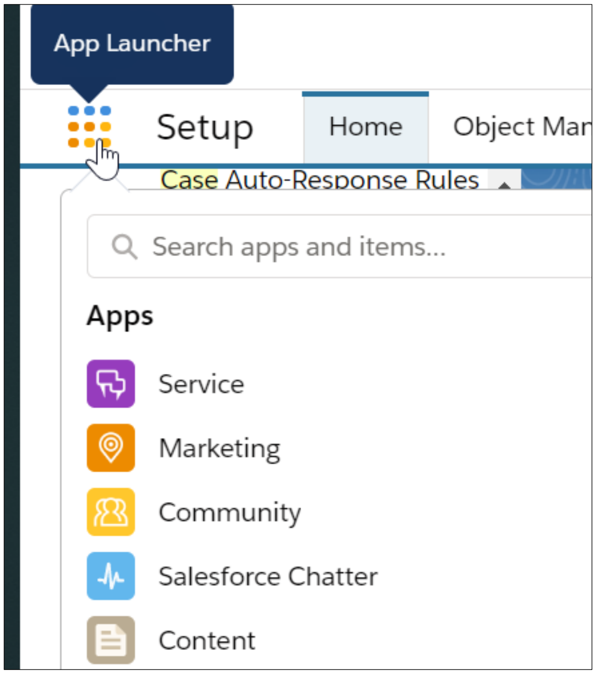
**Contacts** in Salesforce list the individuals associated with your accounts.

To create a new contact, follow these instructions:

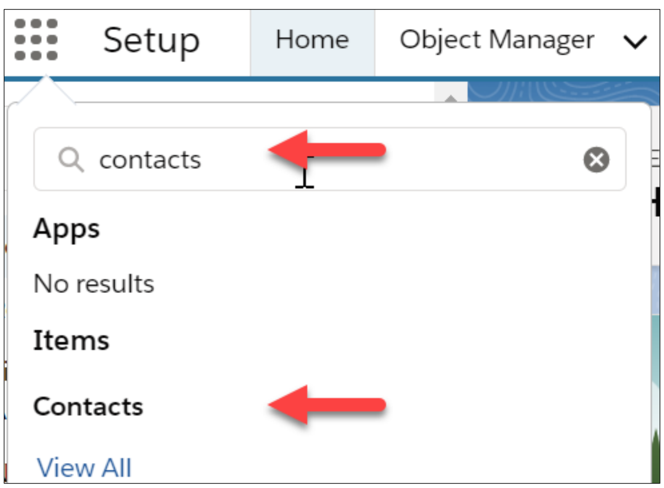
- Login into your **Salesforce** account.



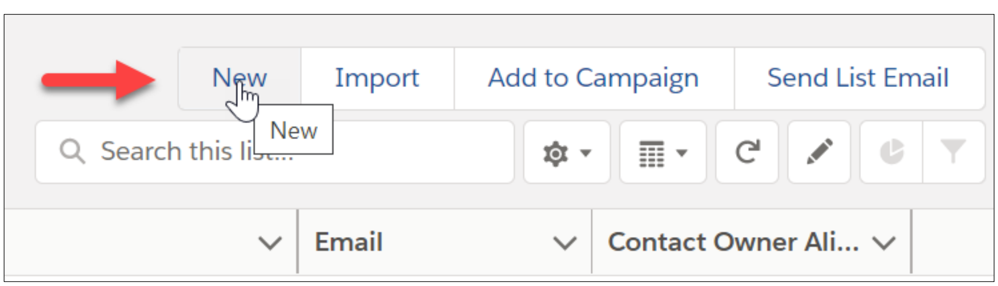
- Click on the **App Launcher** located in the upper-left corner of your screen.



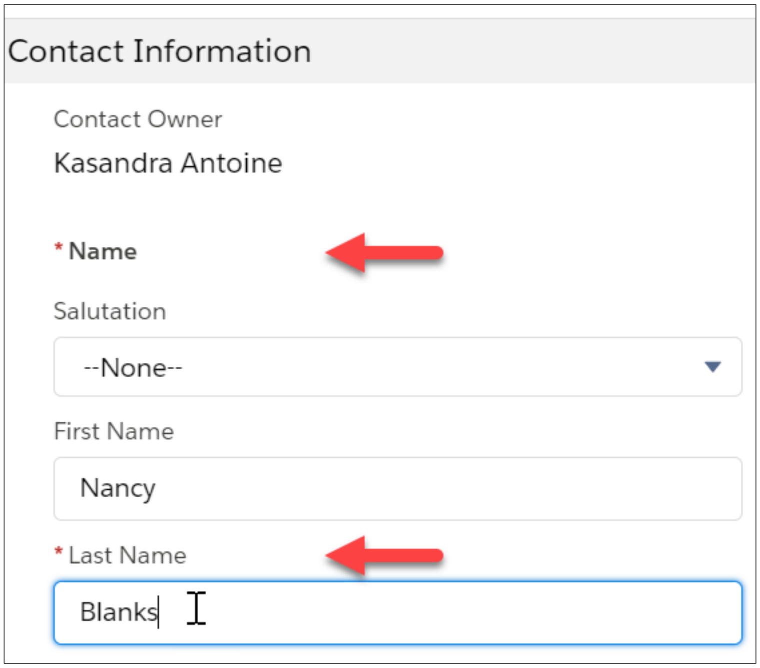

- **Search** for **Contacts**, and click on it.



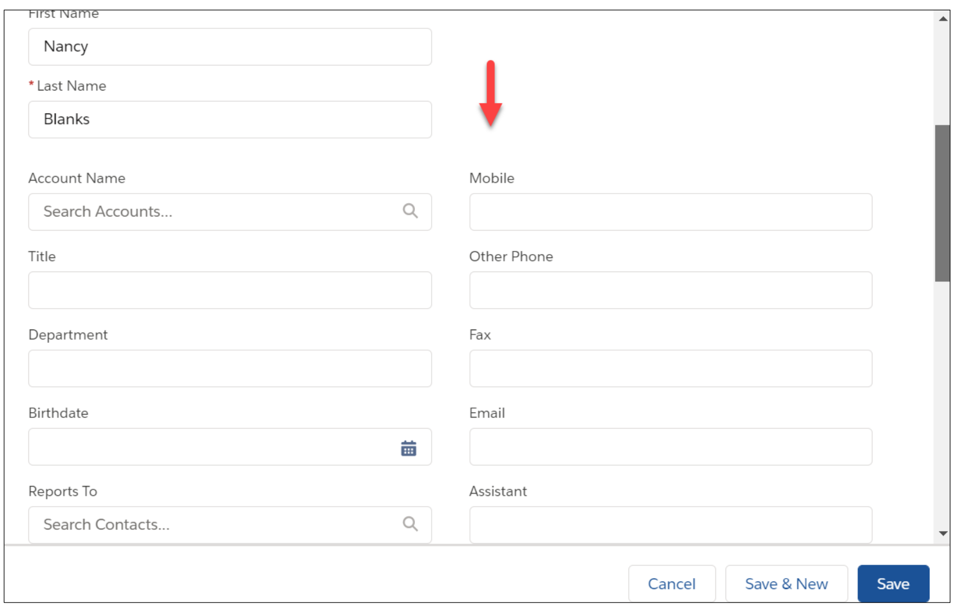

- Click on the **New** button.



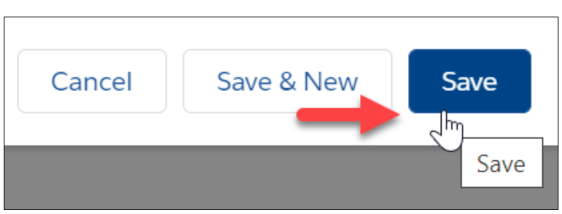
- Enter the required information, **Name** and **Last Name**, into the fields.




- Enter any additional information into the fields.




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



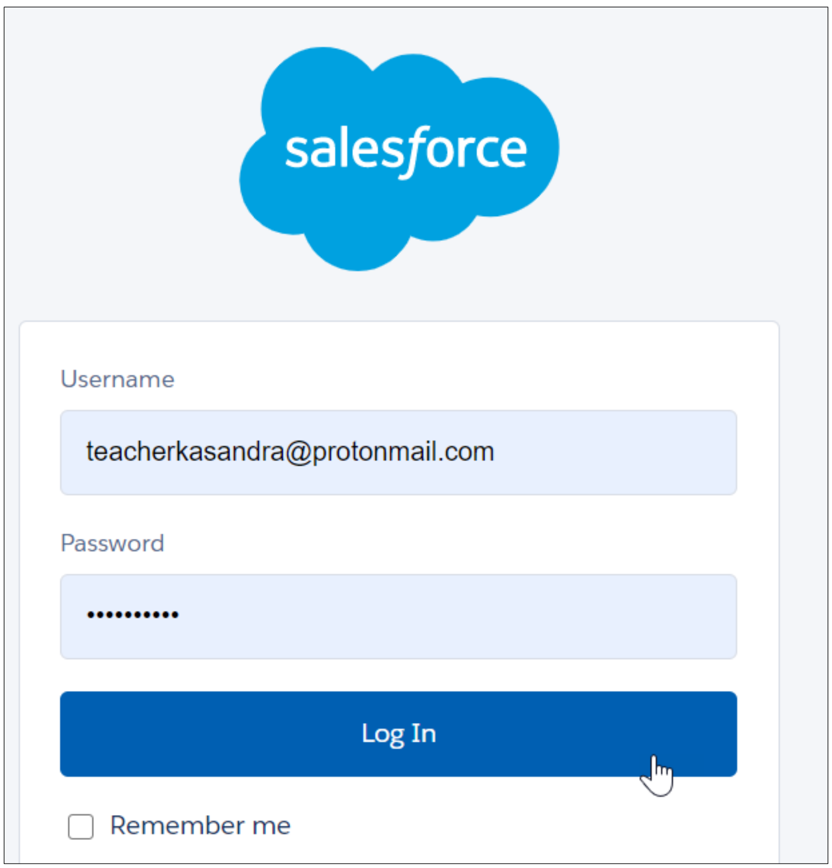
# 4 Create a Case

**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.

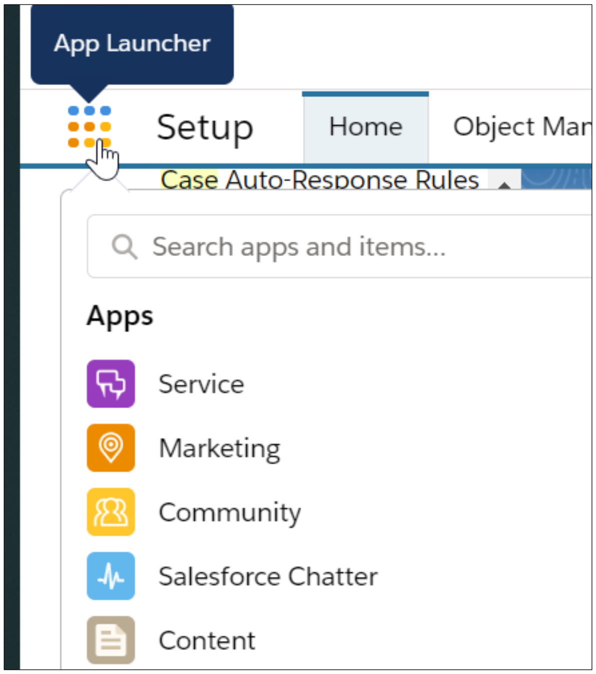
On the **Cases** home page, you can create, locate, and edit cases. You can also sort and filter cases using standard and custom list views.

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

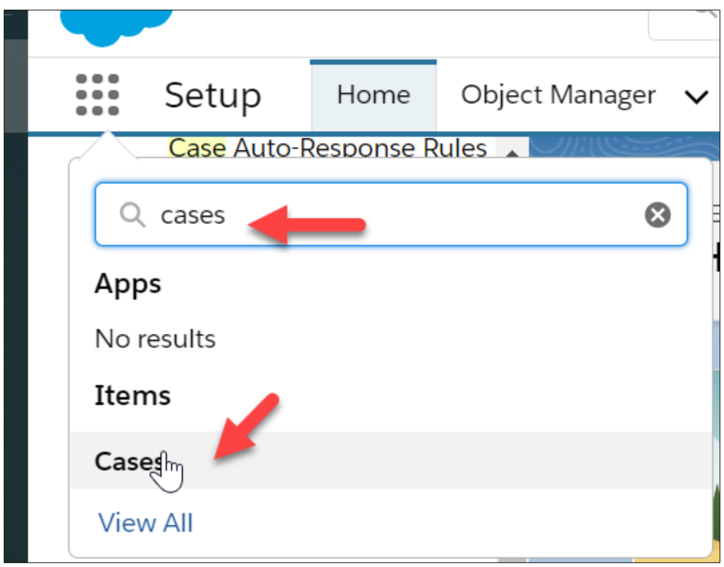
- Login into your **Salesforce account**.



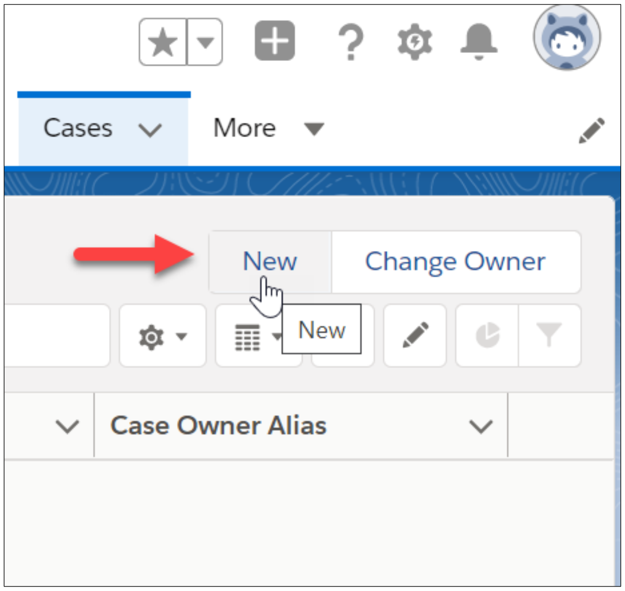
- Click on the **App Launcher**.



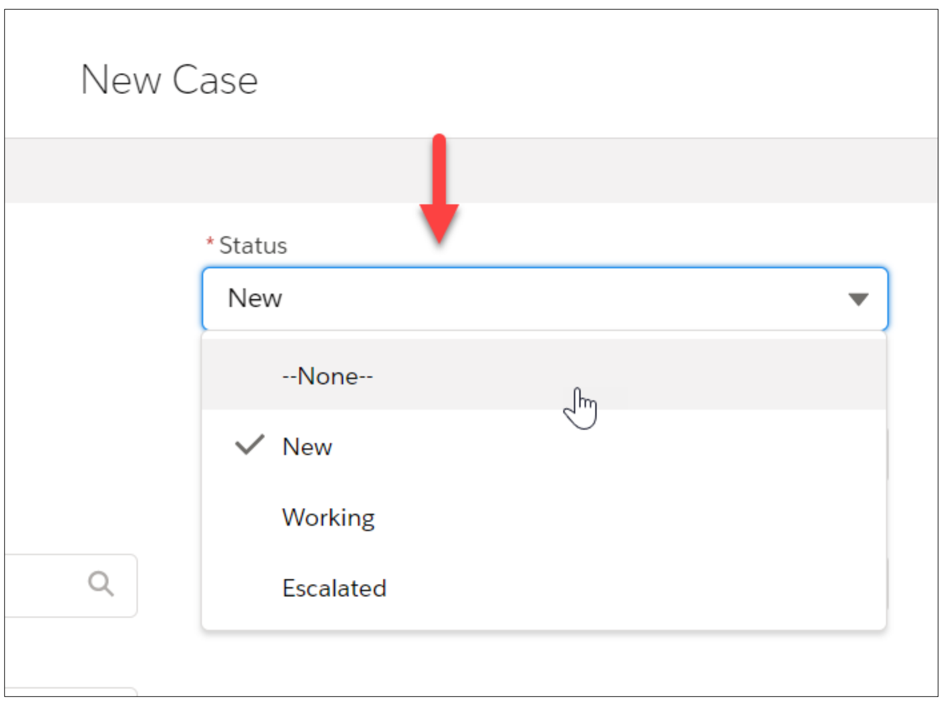

- Search for **Cases** and click on it.



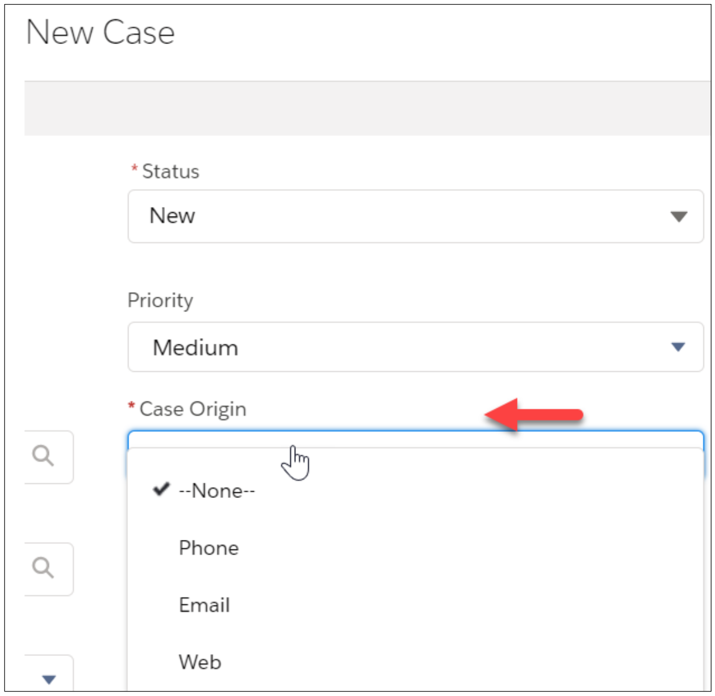
- Navigate to the **New** tab, and click on it.



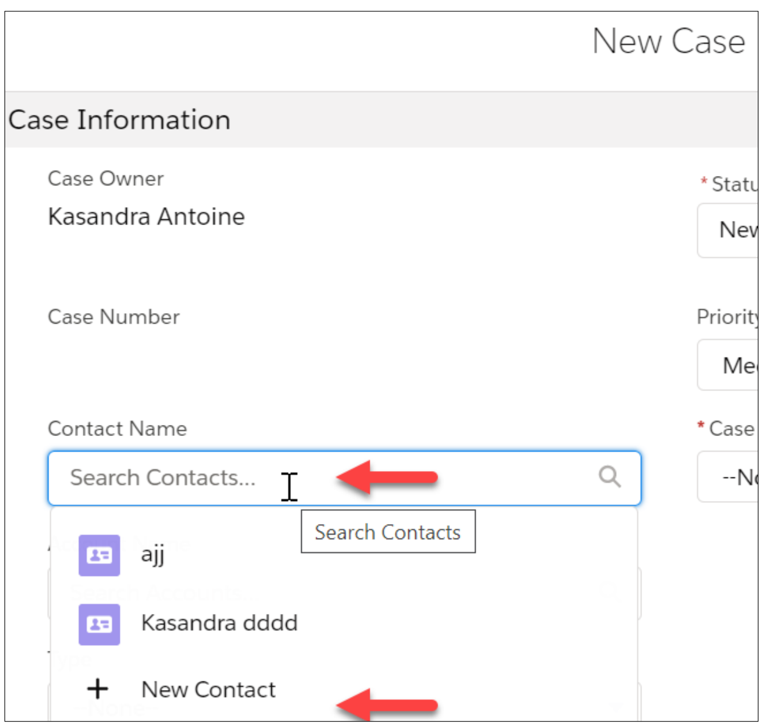

- Complete the required fields:
    - Click on **Status** and choose from **New**, **Working**, or **Escalated**. Your choice depends on the progress of the customer's specific issue.



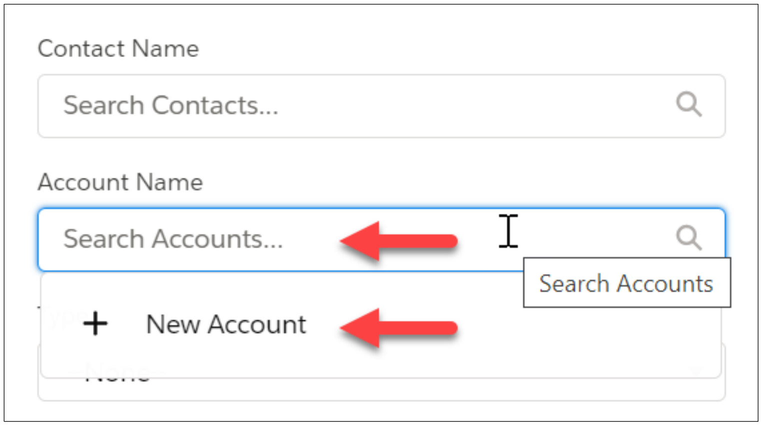
- Click on **Case Origin** and choose from **Phone**, **Email**, and **Web**.



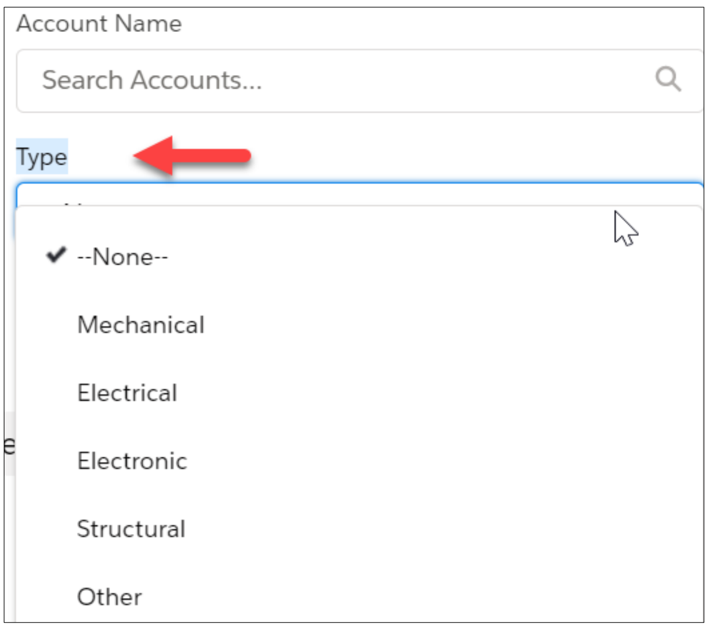

- Go to the **Contact Name** field box. Search for the **Contact**. (If the contact is not listed, select **New Contact**. Follow directions from *3. Create a Contact*.)



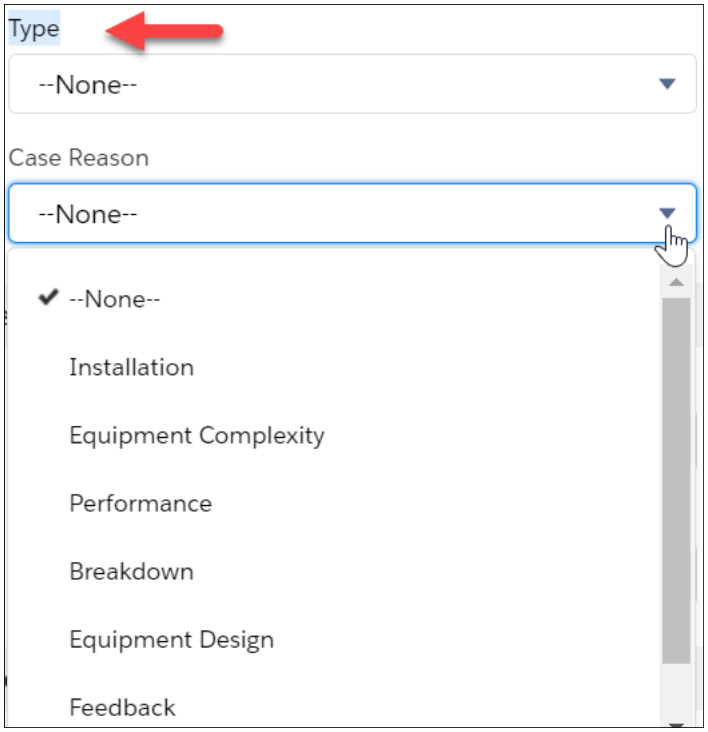
- Go to the **Account Name** field box. Search for the **Account**. (If the **Account** is not listed, select **New Account**. Follow directions from *2. Create an Account*.)



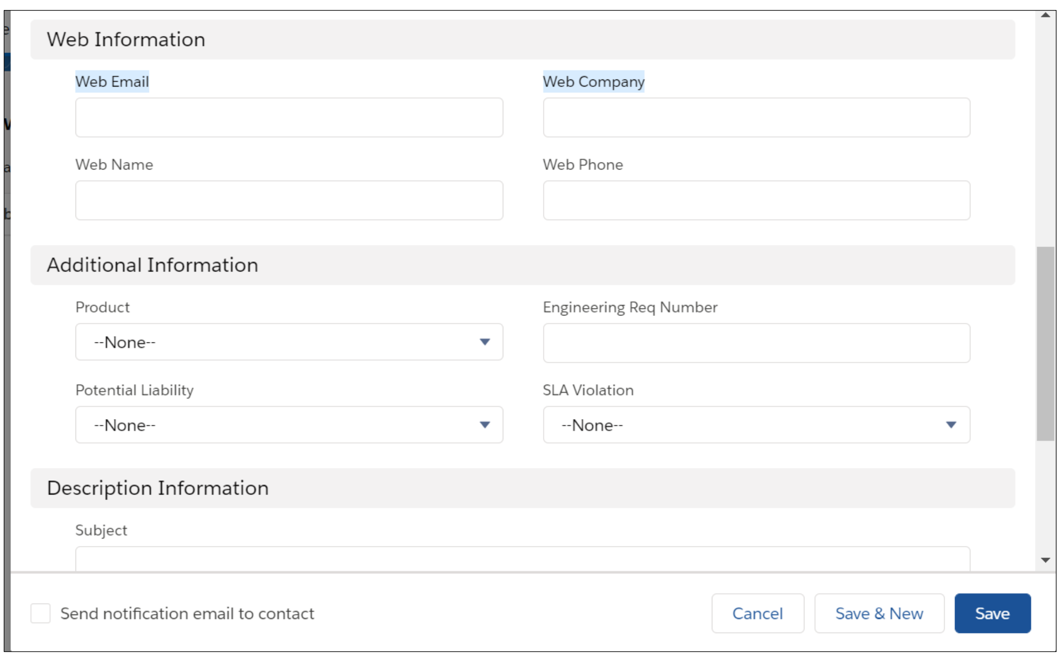

- Click on **Type**, and select the most relevant option.



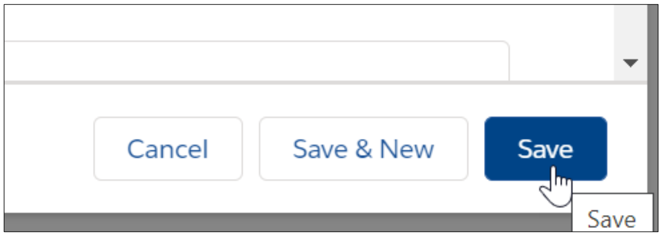
- Click on the **Case Reason**, and select the most relevant option.




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



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

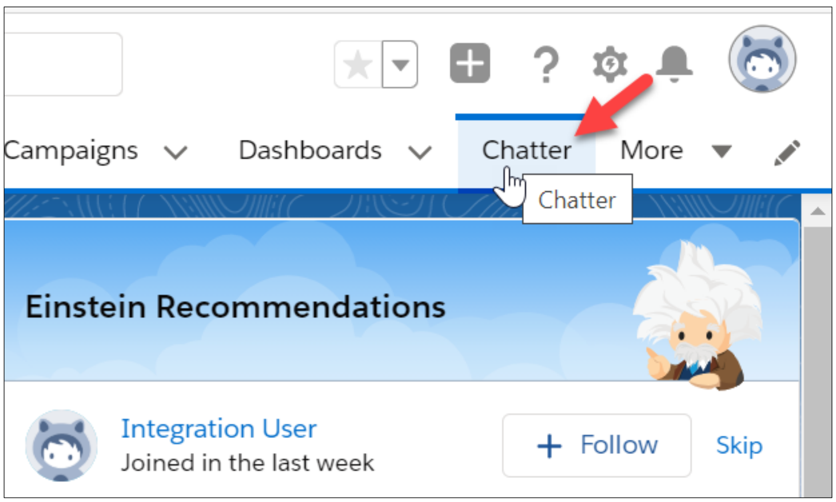


# 5 Create a Chatter Post

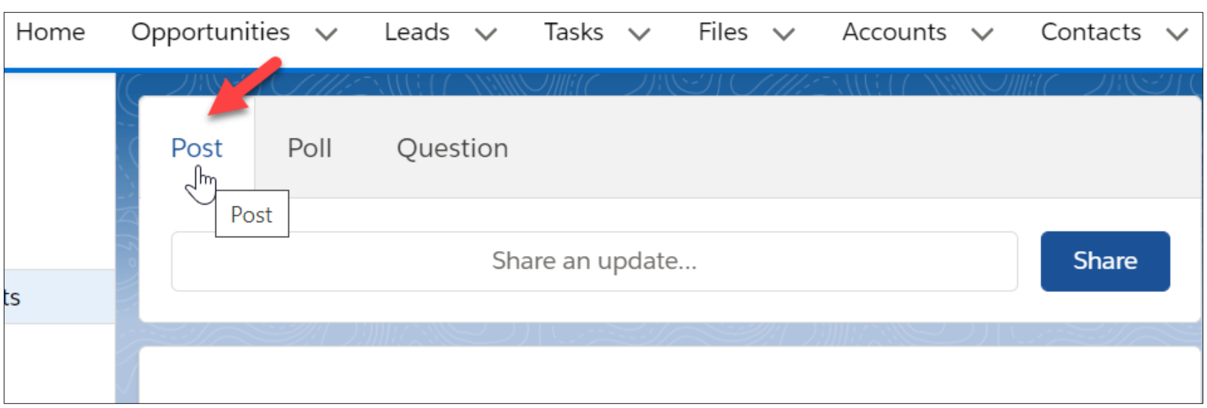
We use **Chatter** publisher to post, comment, ask questions, and create polls. And, you can comment on a post, attach a file or link to your post. Limit posts and comments to 10,000 characters long.

To create a Chatter Post:

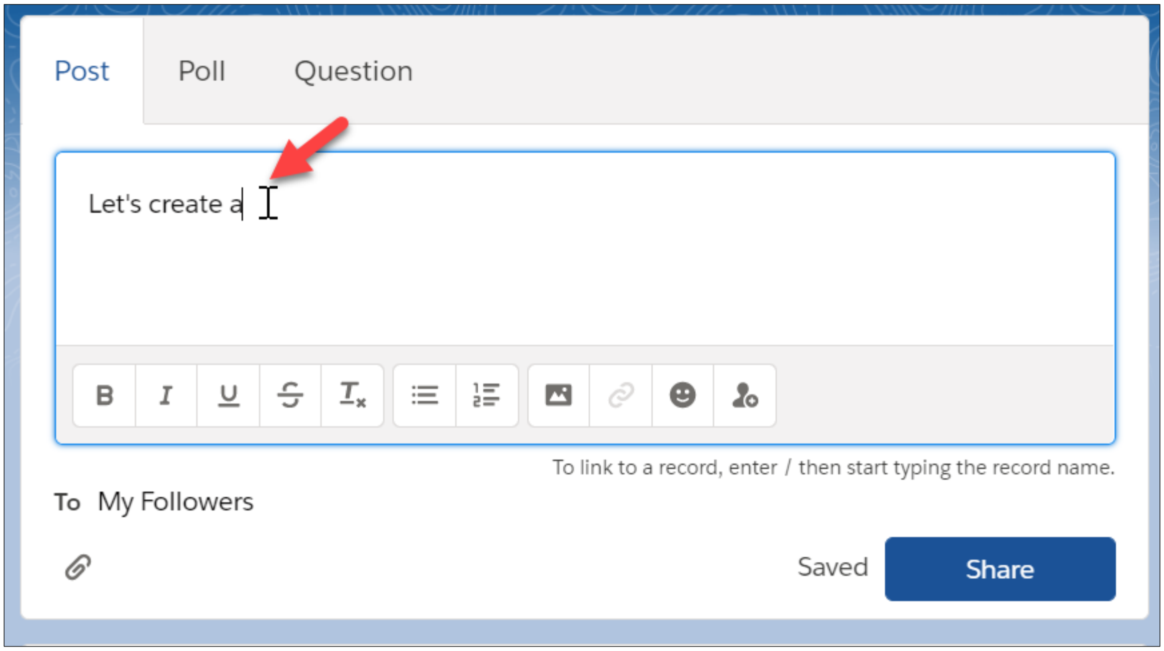
- Click on the **Chatter** tab in the top right corner.



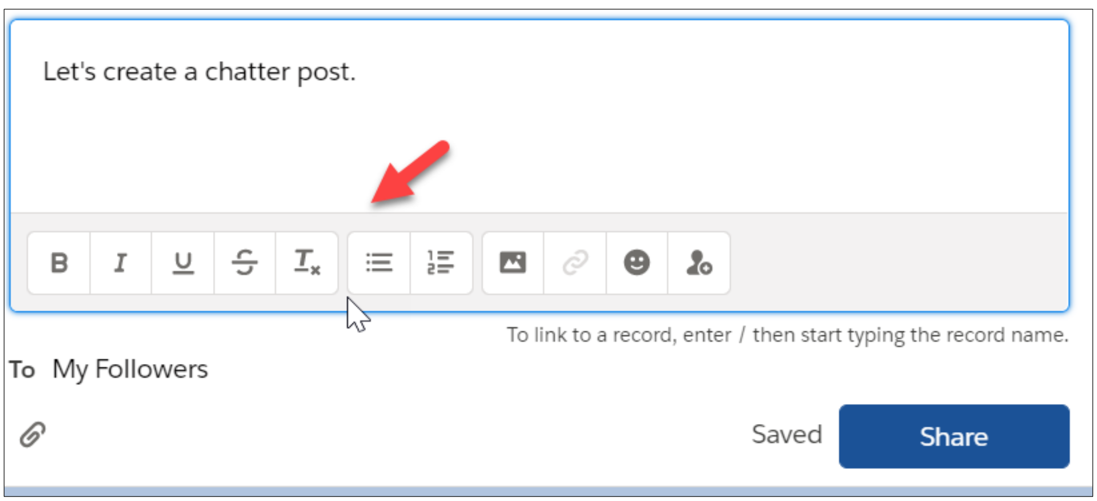

- Click on the **Post** tab.



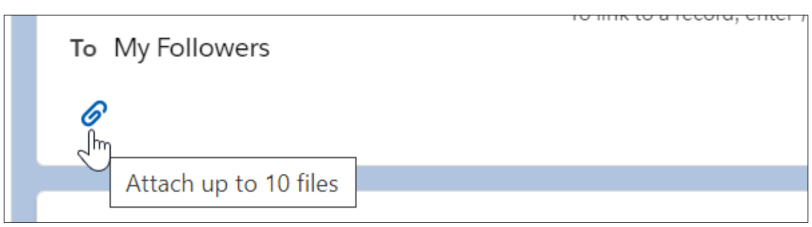
- Start writing your post in the **Post** box.



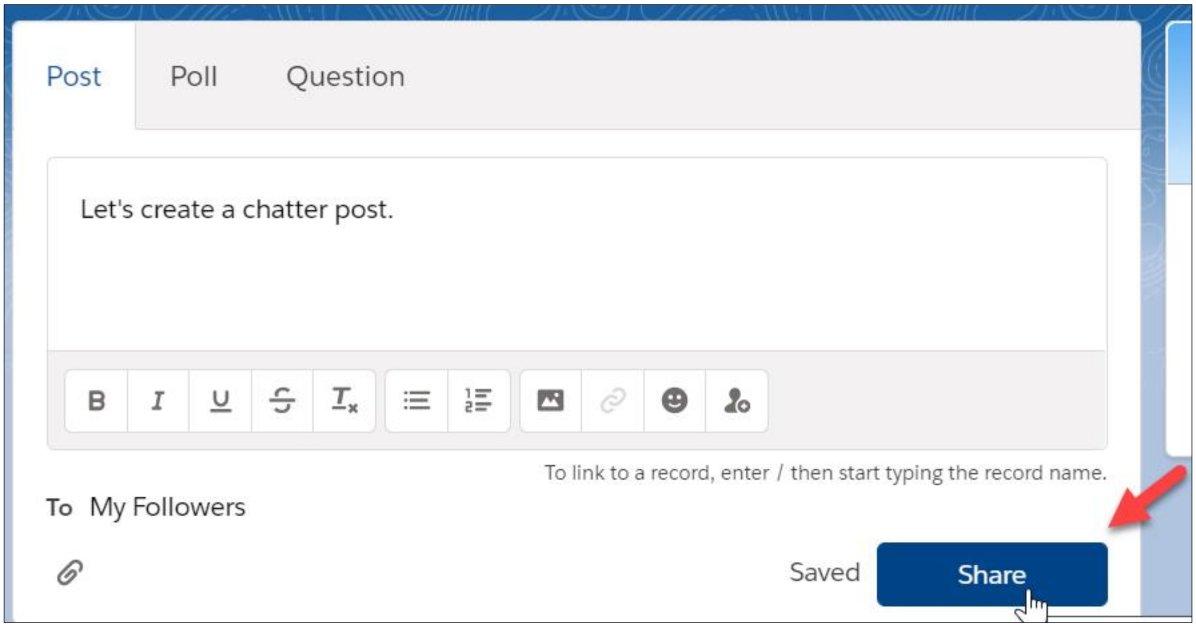

- Use the **Formatting Bar**, below, to change the text format, add images or emojis, or include @mention groups or people.



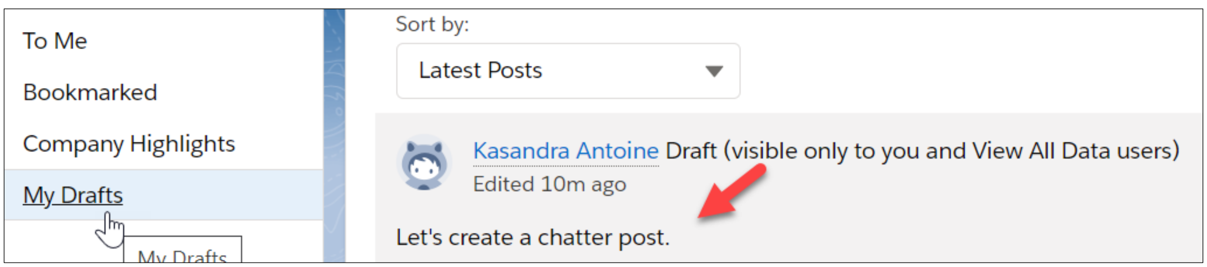

- Use the **Paper Clip** tool to attach up 10 files.



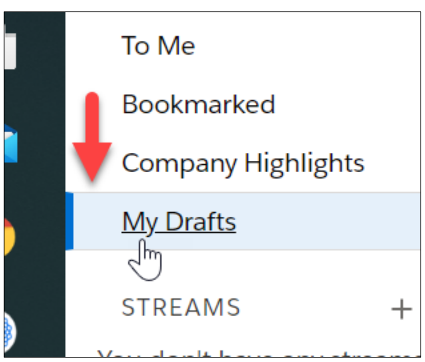
- Select **Share** if you are ready to publish the post.



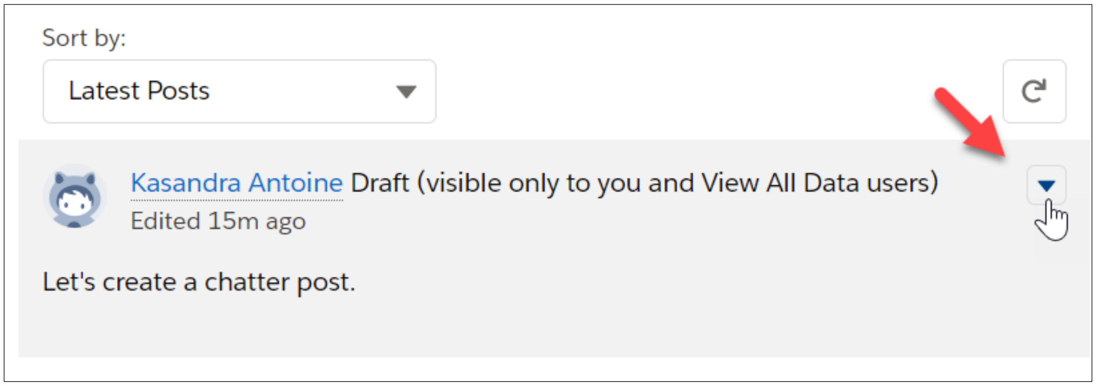

- Or, leave the post for further editing. It will automatically save itself in your **My Drafts** folder.



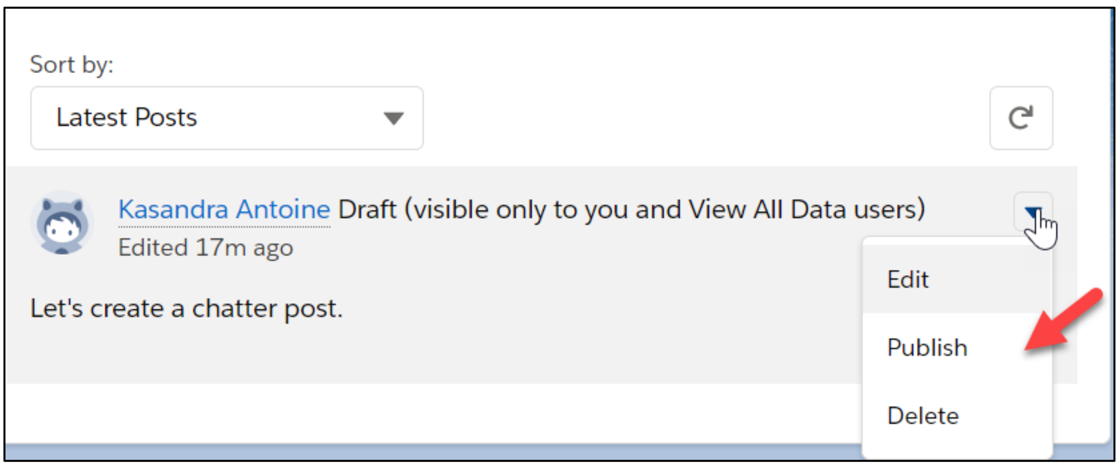

- Click on **My Drafts**, if you did not publish the post earlier.



- 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. |