



TIPS & HINTS FOR SALES REPS

Summary

The account is the starting point and the key to tracking your customers, contacts, and deals.

Getting Started with Accounts

Use accounts to group related information so it's easy to access and manage.

Create the Account

You'll want to create an account for every company you do business with, including customers, partners, and competitors.

1. On the Accounts tab, click **New** in the Recent Accounts section.
2. Fill in the information for the account.
 - For companies with many offices, create one account for corporate headquarters and an additional account for each office location.
 - Fill in the `Account Site` field with the location of the office, such as Headquarters, London, or Paris.
 - Link each location account to the main account using the `Parent Account` field.
3. Click **Save** to save the account and view the account detail page.



Note: Required fields are marked in red.

Then Link Contacts to the Account

Create contacts for each individual associated with the account you just created. The fastest way to do this is to start on the account detail page.

1. View the detail page for the account. Try using search to quickly locate the account.
2. Scroll down to the Contacts related list and click **New Contact**.
3. Fill in the information for the contact.
4. Click **Save** to save the contact and view the contact detail page.

Every contact you create for an account is listed in the Contacts related list on the account detail page.

Finally, Create Your Opportunities

Create an opportunity for each business deal you are working on. Opportunities can be linked to accounts and, optionally, to contacts.

1. If you are working the deal with a specific person, start by viewing that contact. Otherwise, view the account associated with the deal. Try using search to locate the contact or account.
2. Scroll down to the Opportunities related list and click **New Opportunity**.
3. Fill in the information for the opportunity.

Contact Tip

To create multiple contacts for one account, click **Save & New** instead of **Save**. You can then immediately create a new contact for that account.

Opportunity Tip

Name each opportunity in the form *Company - Product*, for example, Acme - 25 Licenses.

4. Click **Save** to save the opportunity and view the opportunity detail page.



Note: For opportunities linked to a contact, notice that the `Contact Name` appears in the Contact Roles related list on the opportunity detail page. The opportunity also rolls up to the account and displays in the Opportunities related list on the account detail page.