



USING SALESFORCE GROUP EDITION

Summary


With Group Edition, you and your team can easily manage your customer relationships, from the start of the sales cycle to closing the deal to providing customer support. All information is shared so your team can work together effectively. This tip sheet outlines the basics of using Group Edition.

Creating Accounts & Contacts

Because all of your Salesforce data is related, it's easy to manage. The *account* is the key to accessing all of your related data because all contacts, opportunities, activities, and cases roll up to the associated account.

The first step is to create your accounts and contacts. Create an account for every company you do business with—including customers, partners, and competitors. Then you can create a contact for every person at those accounts.


1. Select **Account** from the Create New drop-down list in the sidebar.
2. Fill in the information for the account, and click **Save** to view the account.
3. Now scroll down to the Contacts related list on the account, and click **New**.
4. Fill in the information to create a new contact, and click **Save**.

 **Tip:** When creating or editing any records, required fields are marked in red. You won't be able to save your data if you forget to fill in the required fields.

Managing Your Leads

You may want to create leads so that you can track potential customers and opportunities. When you create a new lead manually, you are automatically assigned as the lead owner. When you convert a lead, Salesforce creates a new account, contact, and opportunity.


1. To manually create a new lead, click the Leads tab, and then click **New**. Alternatively, select **Lead** from the Create New drop-down list in the sidebar.
2. Fill in the appropriate information, and click **Save**.

 **Note:** Your administrator can set up Web-to-Lead so you can gather information from your website and automatically generate up to 500 leads per day. Also, your administrator can import up to 50,000 leads at a time.

Managing Your Sales Opportunities

You'll also want to create an opportunity to track each of your business deals.

1. If you are working the deal with a specific person, start by viewing that contact. Otherwise, view the account associated with the deal.

 **Tip:** Try using search to locate the contact or account.

2. Scroll down to the Opportunities related list, and click **New**.
3. Fill in the information for the new opportunity, and click **Save**.

For opportunities linked to a contact, notice that the contact name displays in the Contact Roles related list on the opportunity detail page.

Logging Support Issues

Cases help you track the support issues your customers have. You can create cases based on support calls or email received from customers.

1. View the contact detail page of the customer reporting the problem.
2. Scroll down to the Cases related list, and click **New**.
3. Enter the case details as reported by the customer, and click **Save**.

Cases normally start with a status of "New." You'll want to mark cases as "Closed" as you solve them. Use **Close Case** button on a case to do this.

Tracking Your Activities

As you work with your accounts, contacts, opportunities, cases, and leads, you can easily track your activities. In Salesforce, activities are tasks and scheduled calendar events.

1. Start by viewing the record you want to associate with your activity. For example, you may want to schedule a task to call one of your contacts.
2. Click **New Task** or **New Event** in the Open Activities related list.
3. Fill in the information for the activity, and click **Save**.

To create a task from the home page, click **New** in the Tasks area. For a new event, click **New Event** in the Calendar area, or simply click a calendar date.

The Activity History related list of a record includes other options—you can log a phone call, send an email, or create a mail merge document.

Analyzing Your Data

- Salesforce provides a number of standard reports and dashboards.
- If you have the "Create and Customize Reports" permission, you can also create custom reports to analyze your data.
- Click the Dashboards tab to view a dashboard, which gives you a real-time snapshot of your company's metrics.
- See [Using the Drag-and-Drop Report Builder](#) and [Tips for Creating Dashboards](#) for more info.

Getting More Information

Click **Help & Training** in the upper right of the page to access more information, including training, tutorials, tip sheets, and online help.

Using List Views

- List views are an easy way to quickly list a specific set of records. For example, you can create a list view of all of your accounts in Texas that have a Type of "Partner."
- See [Tips & Hints for Custom Views](#) for more info.