Essentials

Salesforce, Summer '25

Last updated: May 16, 2025

CONTENTS

WHAT IS SALESFORCE ESSENTIALS?

Salesforce Essentials lets you see all of your customer information in one place. Sell smarter and faster with built-in intelligence, and provide personalized service to every customer. Build reports and dashboards to fit your needs so you can dynamically visualize your company's vital data, such as deals won and cases closed.

Salesforce helps you manage your relationships with your leads, soon-to-be-signed customers, happy customers, and customers who reach out to you for help. Salesforce Essentials gives your small business the benefits of a massive platform and ecosystem with Salesforce, but with a quick setup and simple customizations.

Note: For usage restrictions that apply to this product, see this document.

Understand the Basics

Get to know the foundational features in Salesforce like Accounts, Leads, and Cases. Learn how to import your data into Essentials. Take your data to the next level with custom fields, reports, and dashboards.

Getting Around in Salesforce Essentials

Learn how list views can help your and your team manage your customer information and be more productive. Get to know the utility bar to help your team be more productive.

Set Up the Most-Used Features

Get more done in less time by setting up your sales pipeline, automatically turning incoming emails and social media posts into cases, utilizing self-service, and adding a phone.

Going Beyond the Basics

Give your team more automation and productivity by routing incoming work (like cases) to the best-fit person for the job. Use Chat and Messaging to provide instant conversation to your customers through web chat and Facebook Messenger. Use Macros to complete multi-step tasks with a single click.

Get Help

Having some trouble? We can help.

Essentials Resources

Learn more about Essentials with helpful videos and a guided journey. Or, hit the trails with our Essentials-focused modules on Trailhead.

Understand the Basics

Get to know the foundational features in Salesforce like Accounts, Leads, and Cases. Learn how to import your data into Essentials. Take your data to the next level with custom fields, reports, and dashboards.

Salesforce Essentials Glossary

Search for terms and brush up on your Salesforce knowledge with the Essentials glossary.

Importing Data into Salesforce Essentials

Learn best practices for importing your customers' data into Salesforce. You can turn your spreadsheet into Account, Contact, Lead, and Opportunity records in Salesforce using the Data Import Wizard.

Keep Track of All the Details with Accounts

Accounts keep track of contact information and details for any business, customer, or provider that you work with.

Know Exactly Who You're Talking to with Contacts

Contacts are individual people you communicate with to move a business deal forward. If you work with other businesses, Contacts are associated with Accounts, or companies you're doing business with.

Close More Deals with Leads

Snag a business card or see some new opt-ins for your newsletter? Those are leads, or customers who are interested in your product or service.

Track Your Open Deals with Opportunities

Opportunities are business deals in progress. Track progress by moving each opportunity through a series of business milestones called stages, like Prospecting, Proposal Sent, Negotiation, and Contract Signed. The goal is to "win" the opportunity, or move it to a final stage that represents a successful outcome for your business.

Track and Solve Customer Issues

Use cases to track customer feedback and issues. In Salesforce, all the information you need to solve the issue is right in front of you with related contact information, past cases, articles, and more. Say goodbye to jumping from tab to tab and close cases faster.

Get the Details You Need with Custom Fields

Capture all the data that's important to your business by adding custom fields.

Keep Tabs on Every Detail with Reports

See how your business is doing, make better purchasing decisions, and keep tabs on your progress with reports.

Track Your Progress with Dashboards

Take a look at how your business is doing in a single glance with dashboards. You select the metrics that matter and Salesforce brings the data to life with graphs, charts and more.

Salesforce Essentials Glossary

Search for terms and brush up on your Salesforce knowledge with the Essentials glossary.

General Terms

Account

Companies that you're doing business with.

App Launcher

Where you can find compatible apps for Salesforce, including Salesforce standard apps like the Service console and connected apps like DocuSign and G-Suite.

Chatter

A Salesforce collaboration application that lets your users work together, talk to each other, and share information, all in real time. Chatter users can collaborate on sales opportunities, service cases, campaigns, and projects with embedded apps and custom actions.

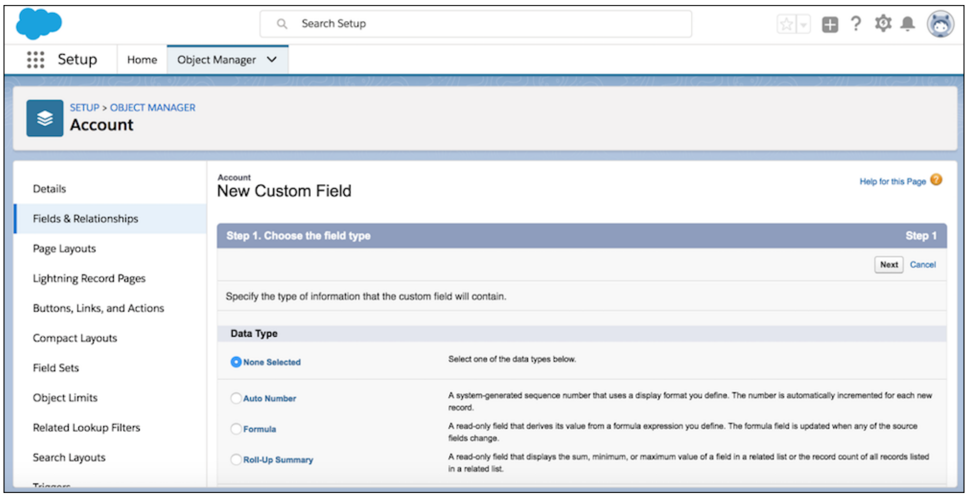
Contact

People who work for the accounts. For example, Adam Smith works at DreamScape Flowers and is the contact for the account.

Contact Role
: The relationship your company has to a specific contact, such as influencer, evaluator, or decision maker. For example, Adam Smith decides what your company's tasks are for his business.

Customer Relationship Management
: Also known as CRM, a technology that allows you to manage relationships with your customers and prospects and track data related to all your interactions. It also helps teams collaborate, both internally and externally, gather insights from social media, track important metrics, and communicate via email, phone, social, and other channels.

Custom Field
: A field that can be added in addition to the standard fields to customize Salesforce for your organization's needs.



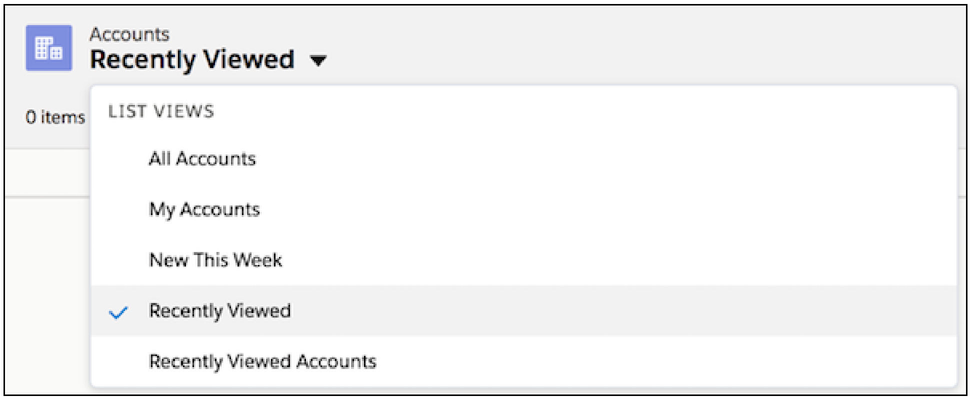
Dashboard
: A visual representation of data reports, shown as charts, gauges, tables, or metrics. The components provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components.

Field
: A piece of data stored in an object.

Lightning App Builder
: A point-and-click tool that makes it easy for you to customize your Salesforce apps like the Sales app or the Service Console app, and give your team all the information they need, all in one place.

Lightning Experience
: An intuitive, intelligent interface that helps sales and service teams work more naturally and productively.

List View
: View a filtered list of records, such as contacts, accounts, or custom objects.



Object
A type of data that you want to store, like a Contact, Account, or Lead.

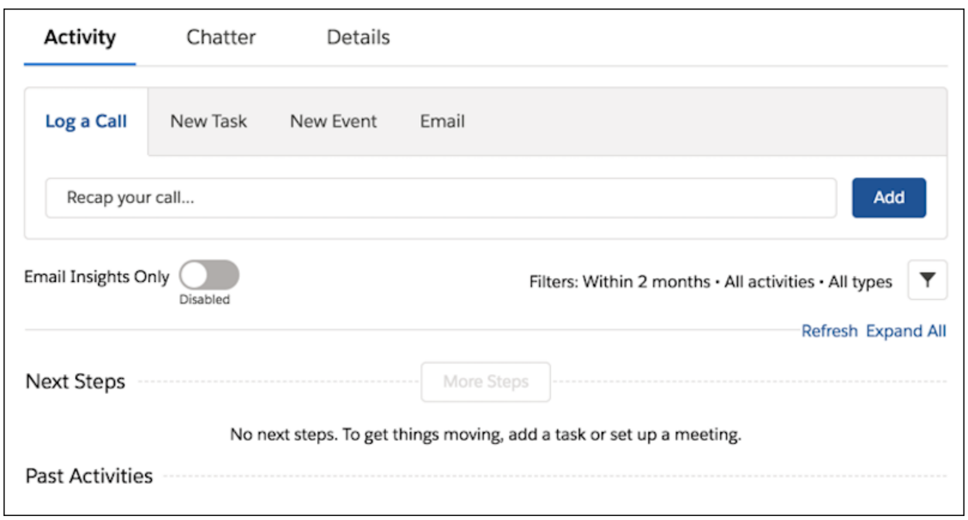
Report
A display of records that meet certain criteria for your business.

Task
A piece of work that needs to be completed with respect to a record.

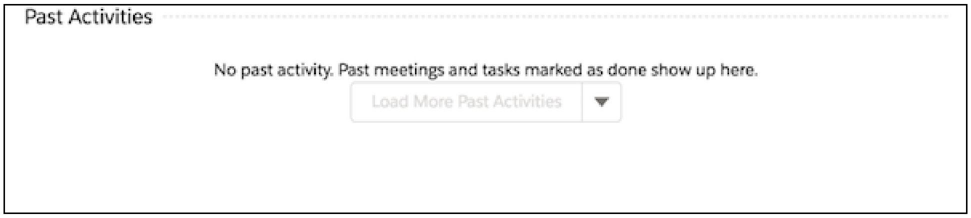
Utility Bar
A fixed footer where you can quickly access common productivity tools, such as Notes, Quip, Phone, and even custom tools.

Sales Terms

Activities
The events and tasks that your sales rep manage in Salesforce.



Activity History
A list of records that displays all completed tasks, logged phone calls, expired events, email, and any associated records.



Campaign

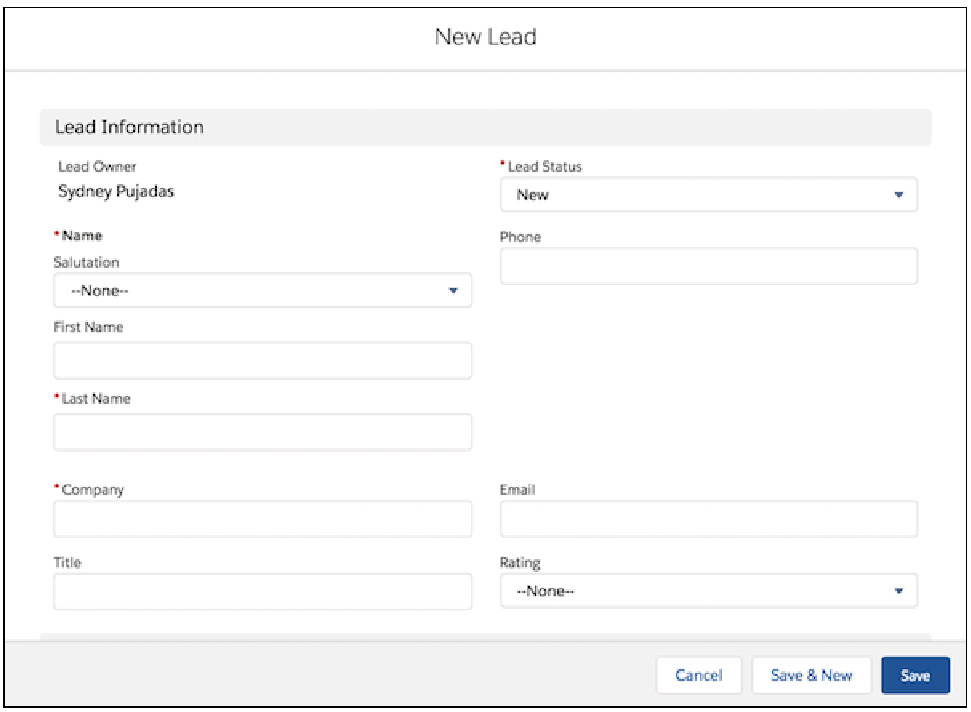
Track marketing initiatives with campaigns. For example, Adam Smith can use Campaign to analyze how many leads the company is generating, how much pipeline they're building, and how many deals they're closing as a result of marketing efforts.

Einstein Activity Capture

An artificial intelligence feature that relates each email to a lead contact or opportunity.

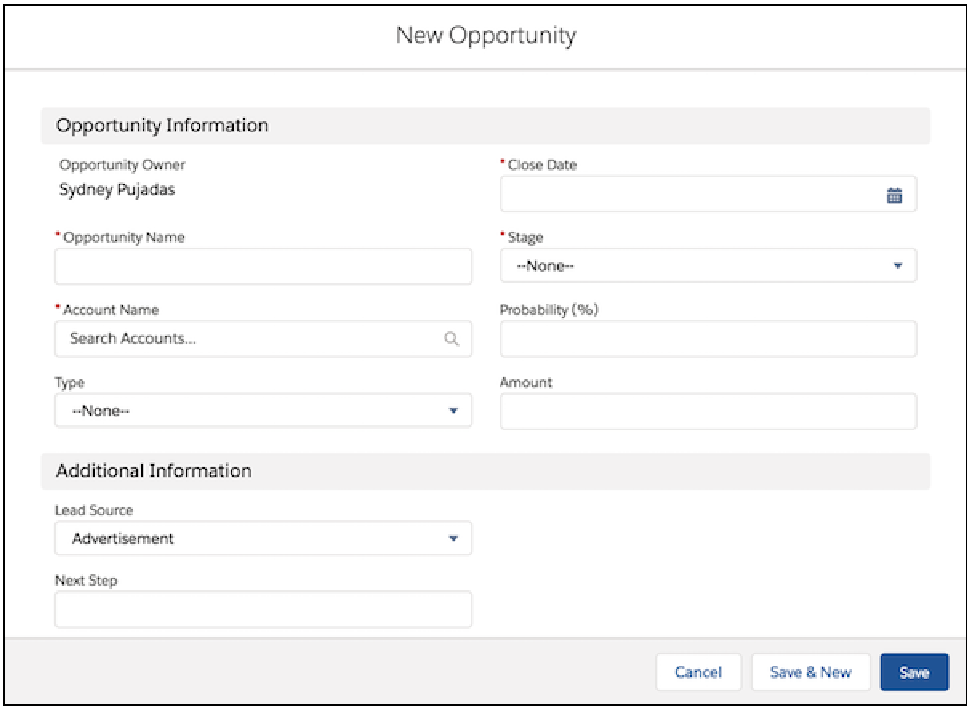
Lead

People and companies that you've identified as potential customers.



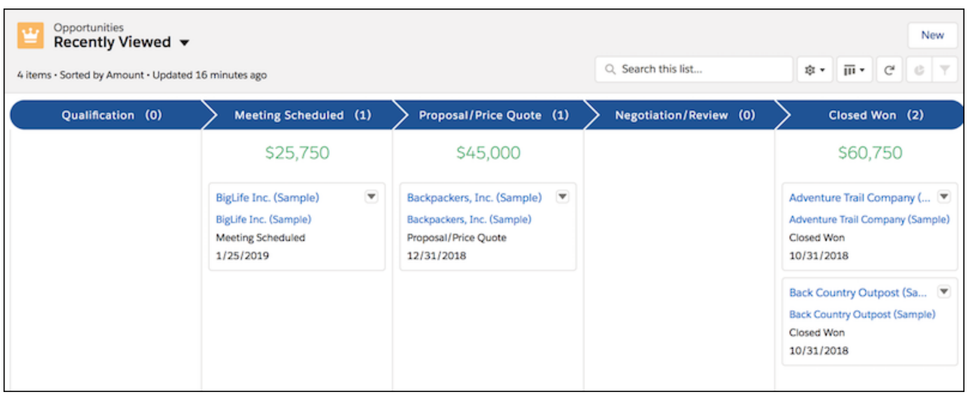
Opportunity

A feature that tracks your sales and pending deals.



Opportunity Stage

A standard field that tracks the status of an opportunity.



Pipeline

A comprehensive view of your opportunities, no matter what stage they're in. It includes everything from the newest prospect to that opportunity with pen in hand, ready to sign.

Salesforce Inbox

Allows you to see your Salesforce data in your email on both your mobile device and your desktop.

Sales Stages

Steps you take to sell your product or service.

Service Terms

Assignment Rules

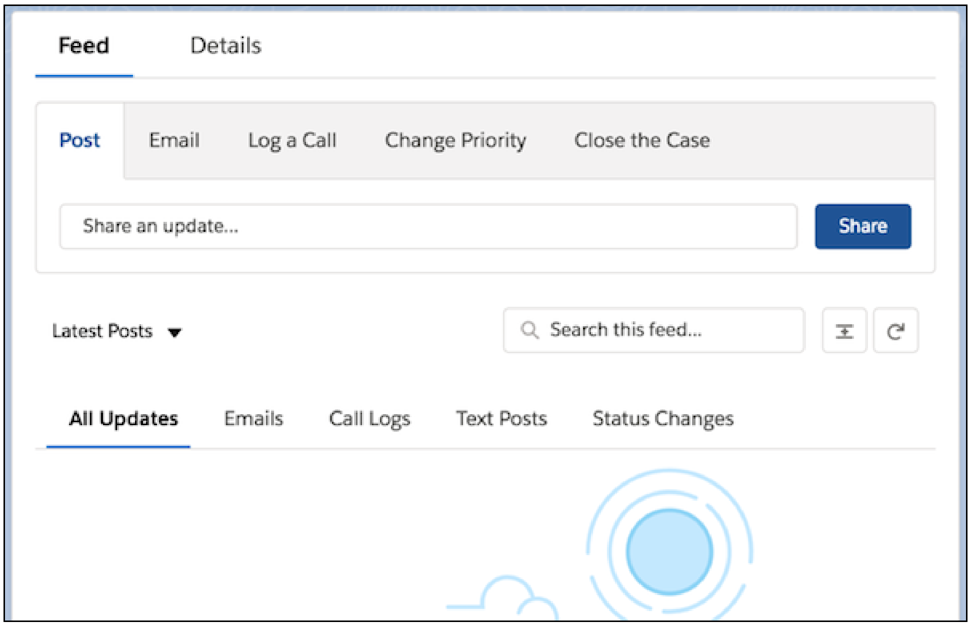
Automatically assign incoming cases to specific people on your team so that the right people work on the right cases.

Case

Also called a support case, customer feedback or issues that need to be addressed.

Case Feed

A news feed that shows you and your team everything that is happening with a case. The feed also shows you a timeline for a case's history and contains information to help you and your team resolve the case.

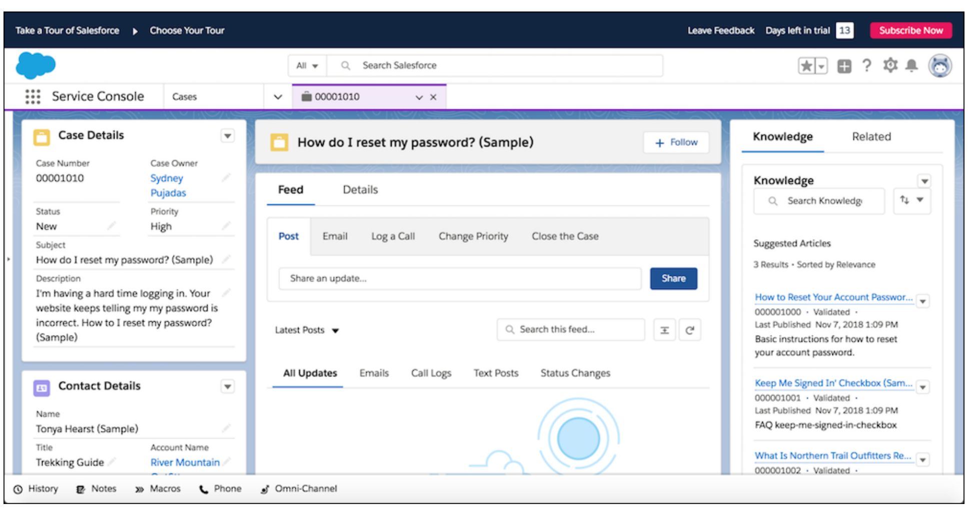


Channels

A combination of phone, email, text message, social media, and more that you use to answer customer questions and comments.

Console

Also known as the service console, the console is where all Salesforce service features come together. On a single screen, you can get a 360-degree view of each customer and where that customer is in your support process.

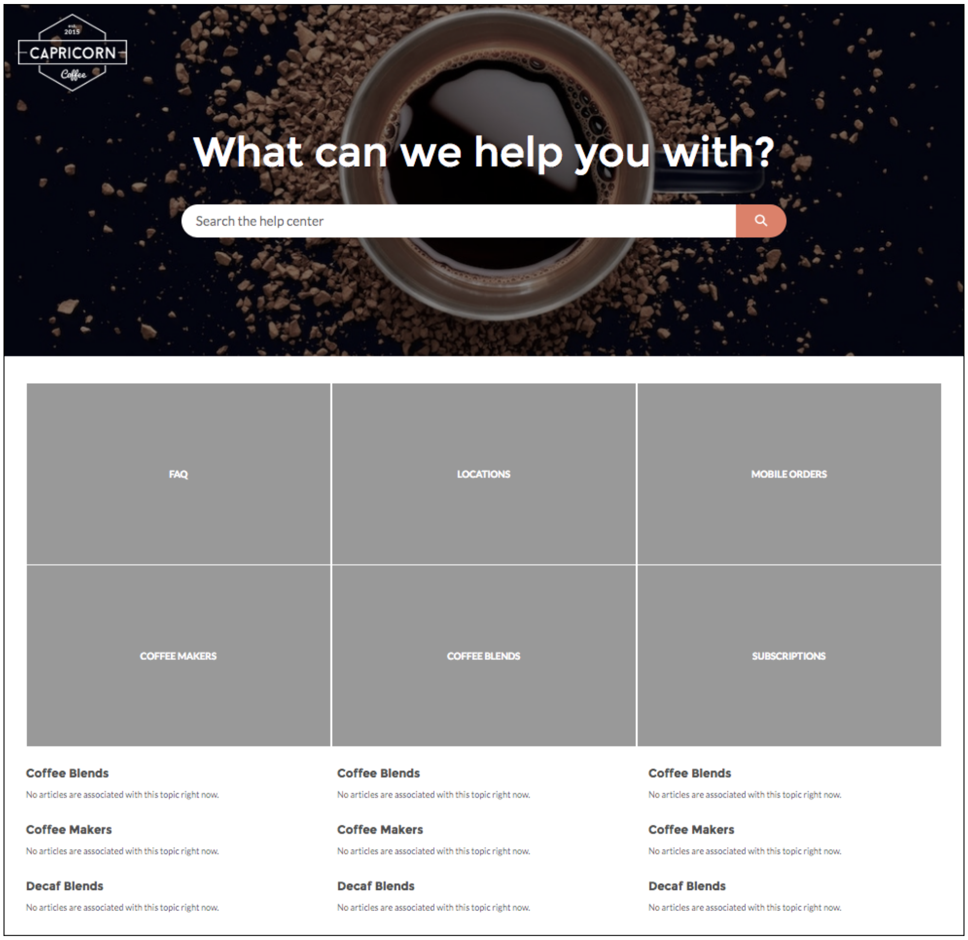


Escalation Rules

Automatically escalate cases to the right people when the cases aren't solved by a certain time.

Help Center

Create a help center that lets your customers help themselves. Display Knowledge articles that answer common questions, and provide a contact button so they can log a case for the issues that require human intervention.

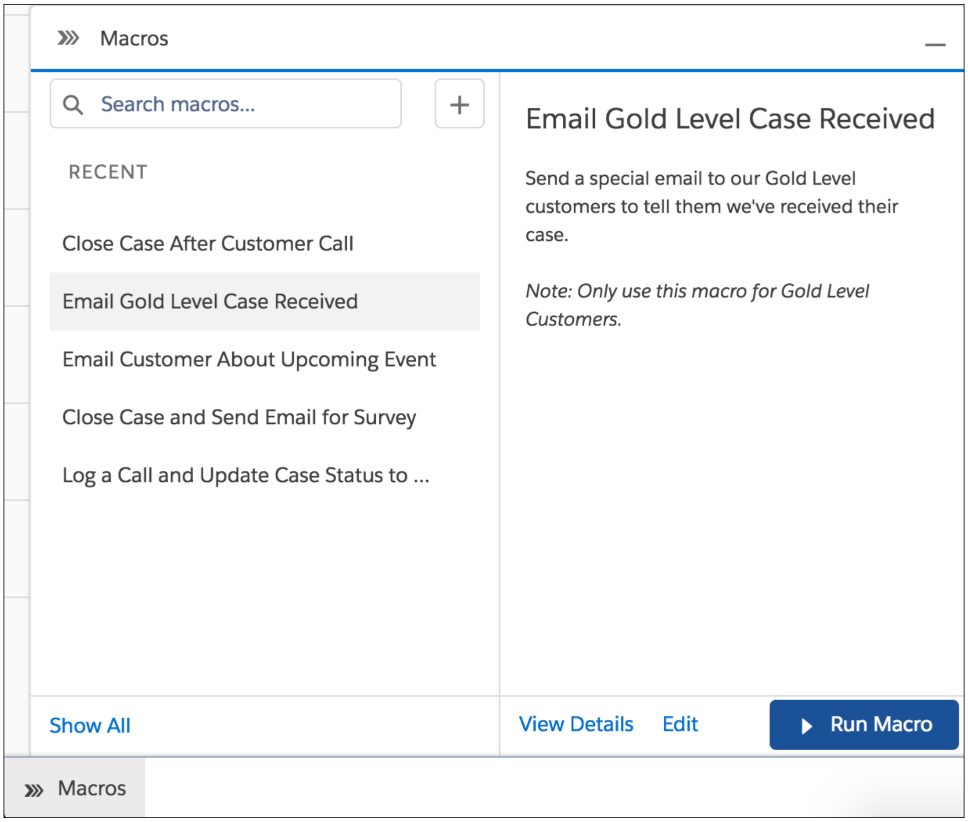


Knowledge Base

Find, share, and store articles or answers related to cases to speed up service. Or, connect your Knowledge base to your help center to let customers find answers on their own.

Macros

Automate common processes for your support team to save them clicks as they help your customers.



Messaging

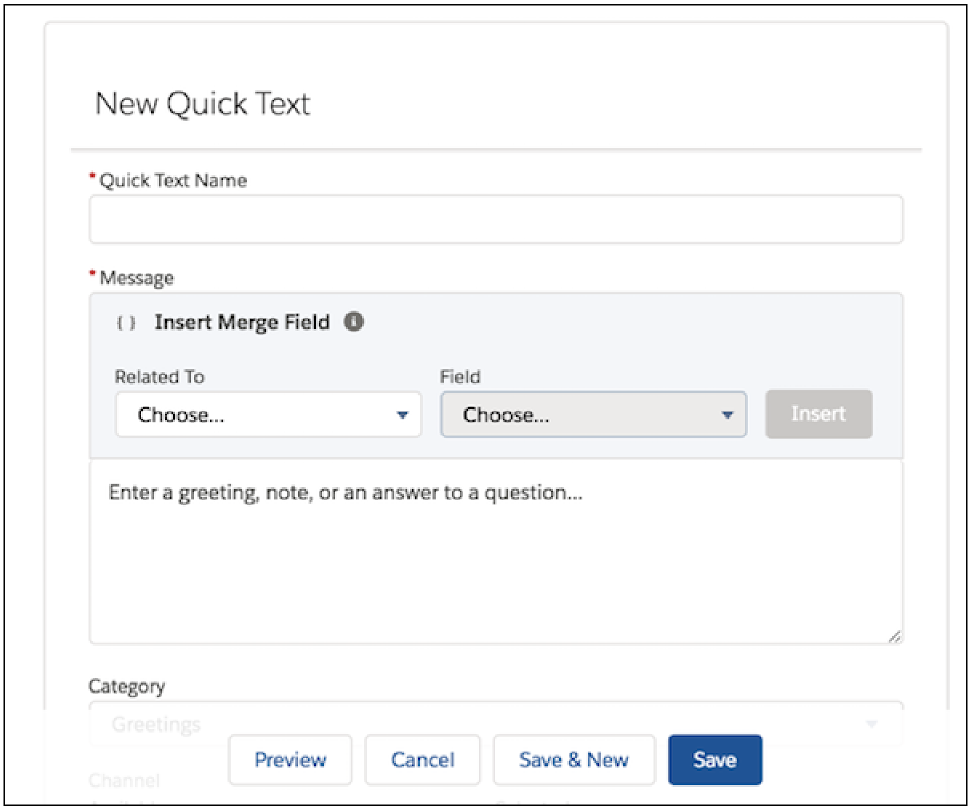
Lets customers talk to your support team using SMS text messaging or Facebook Messenger.

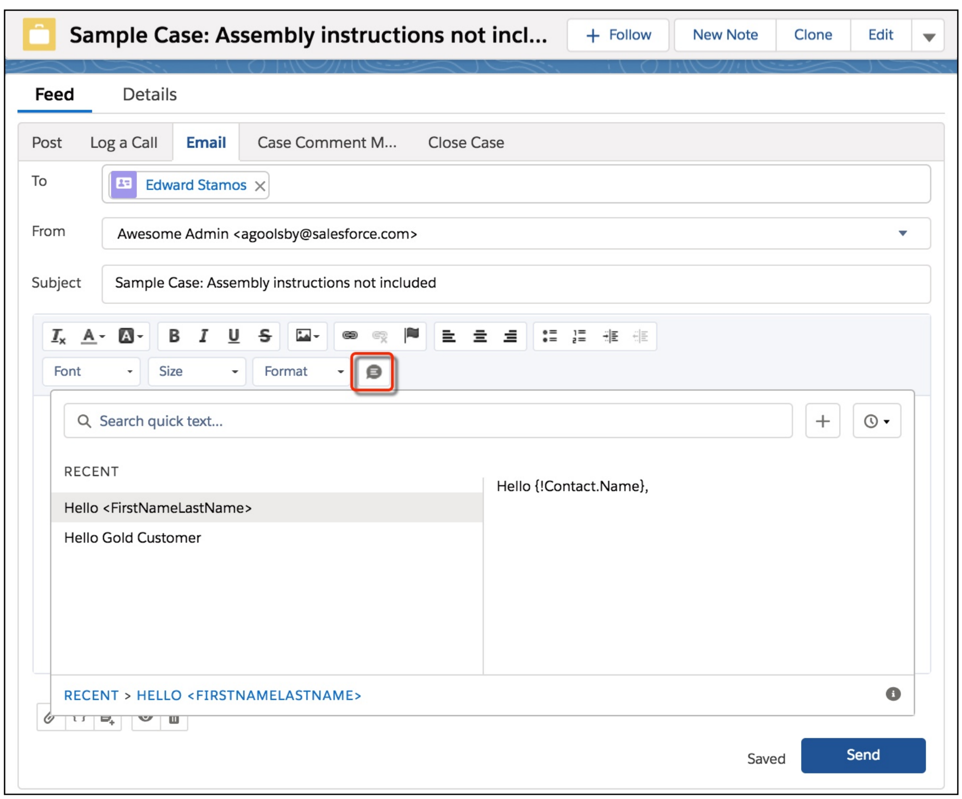
Queue

Queues help you prioritize and distribute work, like cases and leads, across your team. Users in the queue can assign work to themselves, or you can use assignment rules or routing to assign work automatically.

Quick Text

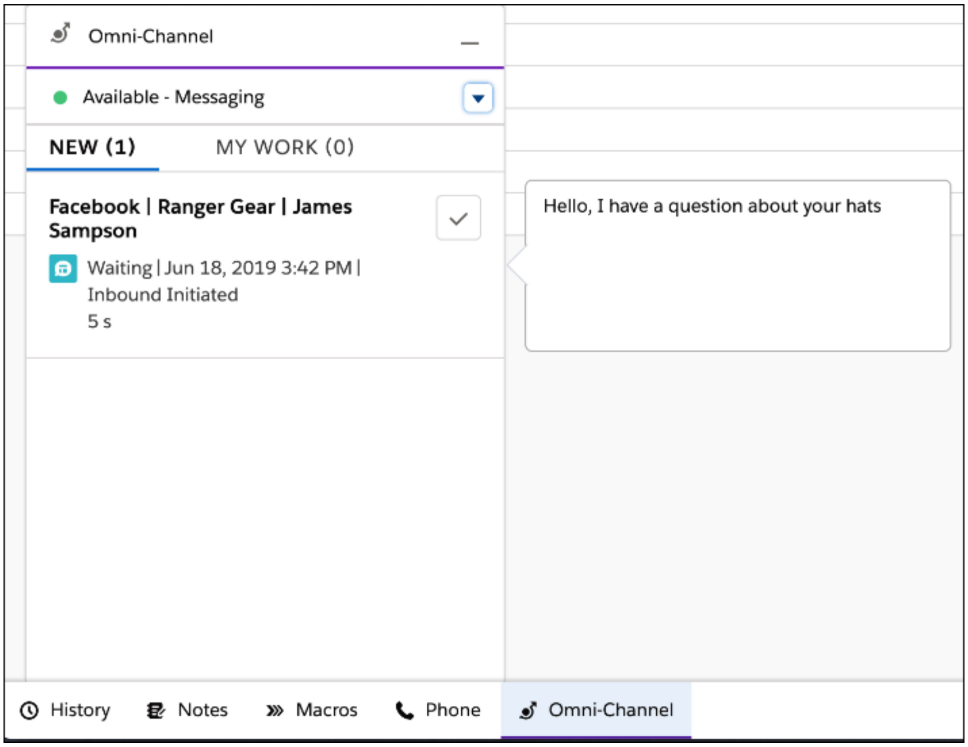
A predefined message, like a greeting, note, phrase, or answer to a common question. You can insert quick text into emails, chats, and more by using a keyboard shortcut.


New Quick Text
*Quick Text Name
*Message
Insert Merge Field
Related To
Choose...
Field
Choose...
Insert
Enter a greeting, note, or an answer to a question...
Category
Greetings
Channel
Preview
Cancel
Save & New
Save


Sample Case: Assembly instructions not incl...
Follow
New Note
Clone
Edit
Feed
Details
Post
Log a Call
Email
Case Comment M...
Close Case
To
Edward Stamos
From
Awesome Admin <agoolsby@salesforce.com>
Subject
Sample Case: Assembly instructions not included
Font
Size
Format
Search quick text...
RECENT
Hello <FirstNameLastName>
Hello Gold Customer
Hello {!Contact.Name},
RECENT > HELLO <FIRSTNAMELASTNAME>
Saved
Send

Routing (via Omni-Channel)

Push incoming work items like cases and leads to the right person on your team, so your customers can get help in a timely fashion. Omni-Channel uses queues to sort work items by priority, so the most important work items are pushed to your team first.

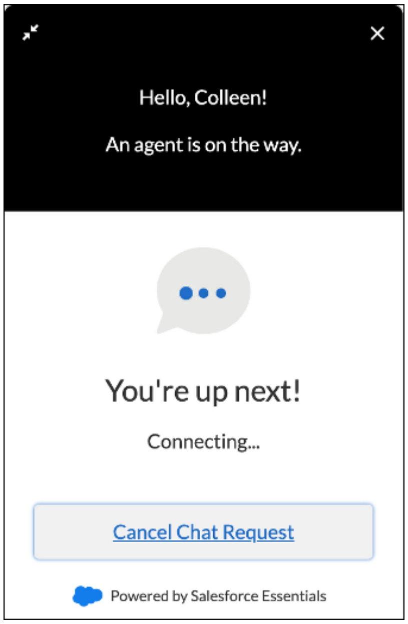


Social Customer Service

Businesses can listen and respond to customers across various social platforms. Your team can pick up issues that have been posted by customers and address them from the Service Console app.

Web Chat

Lets customers have a live chat with your support team through your website.



Importing Data into Salesforce Essentials

Learn best practices for importing your customers' data into Salesforce. You can turn your spreadsheet into Account, Contact, Lead, and Opportunity records in Salesforce using the Data Import Wizard.

Use the Data Import Wizard to import your customer information into Salesforce. Anyone in your org can import accounts, contacts, and opportunities. To import leads, make sure that you have the necessary permissions, or ask your Salesforce admin for help.

Our video demo walks you through preparing your data file for import, creating a custom field, and using the Data Import Wizard to create new Accounts and Contacts in Salesforce. Watch the demo: Import Your Data Into Salesforce Essentials (5 minutes)

Before you start your import, clean up your import file and follow our best practices. You can view the following video playlist to get more information: Data Import How-To Series

Note: If you want to import objects that aren't supported in the Data Import Wizard like tasks or notes, or to update your opportunities from a .csv file, you can use a different tool called dataloader.io. To learn more, see Choosing a Method for Importing Data.

Pre-Import Checklist

Before you import your data, run through this checklist to make sure that you're well prepared. We guide you through getting an overview of the import process, fixing up what's already in Salesforce, and preparing your spreadsheet for a smooth import.

Match Your Information to Salesforce Fields in Data Import

Matching your information to Salesforce fields helps you make sure that all the details you need get to the right place. When you match your information to fields in Salesforce, you're telling us where to put your data during the import.

Fix Data Import Errors in Salesforce Essentials

If there are errors during your data import, we tell you in the attachment in the summary email. See some of the most common errors and our best tips for fixing them.

Migrate Your Accounts, Contacts, and Leads to Essentials from Other Editions

Use reports to set up your accounts, contacts, and leads for import into Salesforce Essentials.

Migrate Your Opportunities, Tasks, and Events to Essentials from Other Editions
Use reports to set up your opportunities, tasks, and events for import into Salesforce Essentials.

SEE ALSO:

Import Your Company's Data in Essentials
Choose an Import Tool

Pre-Import Checklist

Before you import your data, run through this checklist to make sure that you're well prepared. We guide you through getting an overview of the import process, fixing up what's already in Salesforce, and preparing your spreadsheet for a smooth import.

Salesforce comes to life when you import your data. Fix up what's in Salesforce and tidy your spreadsheets to facilitate this process.

See How It Works

Action	Details
Watch setup videos	Our data import series has a lot of useful information to help you get started. For tips and tricks for how to create a clean import file, start with Clean Your Import File and Best Practices for Importing Data.
Take a hands-on workshop	Learn how to clean and import your data into Salesforce with our live and on-demand hands-on workshop. Follow the data import process from the beginning for a smooth data import journey.

Fix What's Already in Salesforce

Action	Details
Fix incomplete information in Salesforce	If you already have some information in Salesforce, make sure that it's all filled in. Complete and accurate records help us prevent duplicates and errors when you import more information. For every Salesforce record, include first and last names, email addresses, phone numbers, company names, job titles, and whatever else you use to distinguish your contacts, deals, and accounts.
Check for required fields	Required fields are in place to make sure that your data is organized correctly. To avoid errors, verify that they're included in your spreadsheet. The following fields are required for accounts, contacts, and leads: • Required fields for Accounts: name • Required fields for Contacts: last name • Required fields for Leads: last name, company name The required field names are listed in red during the import process, but you can look at what's required before you start. For example,

Action	Details
	create an opportunity and see which fields are marked as required. You can also click **Save** before entering any information to highlight the required fields.
Customize fields	Create the custom fields you need in Salesforce before importing data. When you include the names of your custom fields in your spreadsheet, your information has somewhere to go in Salesforce. To create custom fields, go to **Setup** > **Object Manager**.

Get Your Spreadsheet in Tip-Top Shape

When you clean up your spreadsheet, your import goes much more smoothly because every bit of information has its place in Salesforce.

First Name	Last Name	email	Phone	Rating	Status	Owner	Company
Adrian	Benavides	Benavides@123Warehousing.com	(415) 835-1656	Hot	Open	Kyle	123 Warehousing
John	Thomas	john@johnjohn123.com	(516) 123-1658	Hot	Open	Kyle	ZiffCorp
Billy	Bones	Bones@youwin.com	(415) 242-2222	Hot	Open	Kyle	YouWin
Freddy	Jones	fjones@youwin.com	(212) 333-4545	Cold	Open	Kyle	YouWin
Carla	Borgonovo	Borgonovo@ZiffCorp.com	(415) 835-1658	Cold	Open	Kyle	ZiffCorp
Ann	Bowles	Bowles@AcmeCorp.com	(415) 242-9230	Cold	Open	Kyle	Acme Corp
B	Bradley	Bradley@Mr.Sparkle.com	(415) 835-1659	Cold	Open	Kyle	Mr. Sparkle
Al	Broumand	Broumand@SmithandCo.com	(415) 835-1658	Cold	Open	Kyle	Smith and Co.
David	Campbell	Campbell@Virtucon.com	(415) 835-1661	Hot	Open	Kyle	Virtucon
Dan	Casey	Casey@ThriftBank.com	(415) 835-1655	Hot	Open	Kyle	Thrift Bank
Andy	Com	Com@Sampleinc.com	(415) 835-1665	Cold	Open	Kyle	Sample, inc
Brenda	Cowan	Cowan@StoPlainsHoldings.com	(925) 210-3943	Hot	Open	Kyle	Sto Plains Holdings
Chris	Dailey	Dailey@ThathertonFuels.com	(415) 835-1661	Cold	Open	Kyle	Thatherton Fuels
Christopher	Damman	Damman@MoobyCorp.com	(415) 242-9230	Cold	Open	Kyle	Mooby Corp
Dan	Davis	Davis@FlowersByIrene.com	(415) 835-1656	Hot	Open	Kyle	Flowers By Irene

Action	Details
Keep accounts and contacts in the same place	Save time and import contacts and accounts together by including both in your .csv file. If you prefer, you can import them separately using dataloader.io instead of the Data Import Wizard in Salesforce.
Delete any duplicates	Make sure that your file doesn’t contain duplicate entries. You can have multiple contacts for one account, but avoid entering the same contact twice or importing the same person as both a contact and a lead.
Format properly	Clearly separate fields in your spreadsheet. For example, if you include addresses, make sure that there are separate columns for street, city, state, and zip.

Action	Details
Include email addresses with names	You have two options to match your data: either by name or by email. Emails are more unique than names, so it's best practice to keep your contacts and accounts matched by email.
Edit the record owners	When you import new data, include an Owner Full Name column to keep items assigned properly. If you don't include owners, you're made the owner of everything that's created during the import. When you update existing data, use record owner IDs to link your records to an owner in Salesforce.
Triple-check the spelling	You can edit the spelling after your data is imported, but it's difficult to find what you're looking for if a name or company is misspelled. You can also end up with duplicates if you have two different spellings of the same name.

After you clean up your data in Salesforce and in your spreadsheet, you're ready to start your import. Export your spreadsheet as a .csv file, then start the data import process in Salesforce.

SEE ALSO:

On-Demand Workshop: Importing Your Contacts in Essentials

Create Custom Fields

Delete Multiple Records and Reports

Match Your Information to Salesforce Fields in Data Import

Matching your information to Salesforce fields helps you make sure that all the details you need get to the right place. When you match your information to fields in Salesforce, you're telling us where to put your data during the import.

It's easier to correct your .csv file than it is to update individual Salesforce records later on. We recommend naming the columns in your .csv file to match fields in Salesforce before you start your import, so your data ends up in the right place. You can also match your information to Salesforce fields during the import process.

Tip: If you need help, you can contact our support coaches directly by logging a case.

Get the names for the object you're importing (lead, contact, account, opportunity, or campaign member) and use them in your .csv file.

1. Go to **Setup** > **Object Manager**.
2. Click the name of the object you want to import.
3. Click **Fields & Relationships**.
4. Save the names from the Field Label column.
5. In your .csv file, change the column names to match the names you saved from Salesforce.

During the import process, we try to match your data to Salesforce fields for you. You can review what we matched and make changes after you upload your .csv file. And don't worry—we let you know if we're missing something important or if there's data that doesn't have a place to go.

Fix Data Import Errors in Salesforce Essentials

If there are errors during your data import, we tell you in the attachment in the summary email. See some of the most common errors and our best tips for fixing them.

In the error file you receive from us, there's an extra field that describes errors for each item in detail.

Note: The .csv file contains only the data that didn't import into Salesforce. For example, if you have an invalid email address for a contact, the account information gets imported, but the contact information doesn't.

Tips for Fixing Import Errors

Follow these tips to get your import finished quickly and correctly.

Tip	Details
Use the error file as your import file	Fix the errors in the error file, then use the error file (not your original file) when you run your import again. Your import processes faster when there are fewer items in the .csv file.
Use the update option to avoid duplicates	When you run your next import, select the option to update the existing information in your org. The setting tells us to look for a matching record to update before we create a new one, so you don't end up with duplicates. For example, to fix errors in your accounts using the Data Import Wizard, select **Update Existing Account Information**.
Use the added fields during your next import	The .csv you receive from us often contains new fields. When you run your import again, map the added field to the related field in Salesforce. For example, if you have an invalid email address for a contact, the error file contains an added field called AccountId. Map the AccountID field to Contact: Account ID during the next import.
Know how to delete and start over	Sometimes, the best course of action is to delete the items you imported and try again. To delete lots of data at once, go to **Setup** > **Data** > **Mass Delete Records**.

Common Import Errors

Let's look at the most common import errors and how to fix them.

Error	Details
Required fields are missing	Items in your spreadsheet don't have values for at least one required field. Include a value, or if possible, make the field not required. Required fields are set on an object's page layout from **Setup** > **Object Manager**.
The new owner must have read permission	Items in your spreadsheet are getting reassigned to someone who doesn't have permission to view them. If you haven't set owner IDs on your spreadsheet, items could be reassigned to you because

Error	Details
	you're performing the import. Ensure that record owners have read permissions activated on their profile in **Setup** > **Users**.
Enter an email address that matches the format myemail@company.com	Fix the email addresses listed in the error message, including any typos.

Always Check Your Work

After you run any import, look for your new data in Salesforce. Verify that your information is mapped correctly.

Migrate Your Accounts, Contacts, and Leads to Essentials from Other Editions

Use reports to set up your accounts, contacts, and leads for import into Salesforce Essentials.

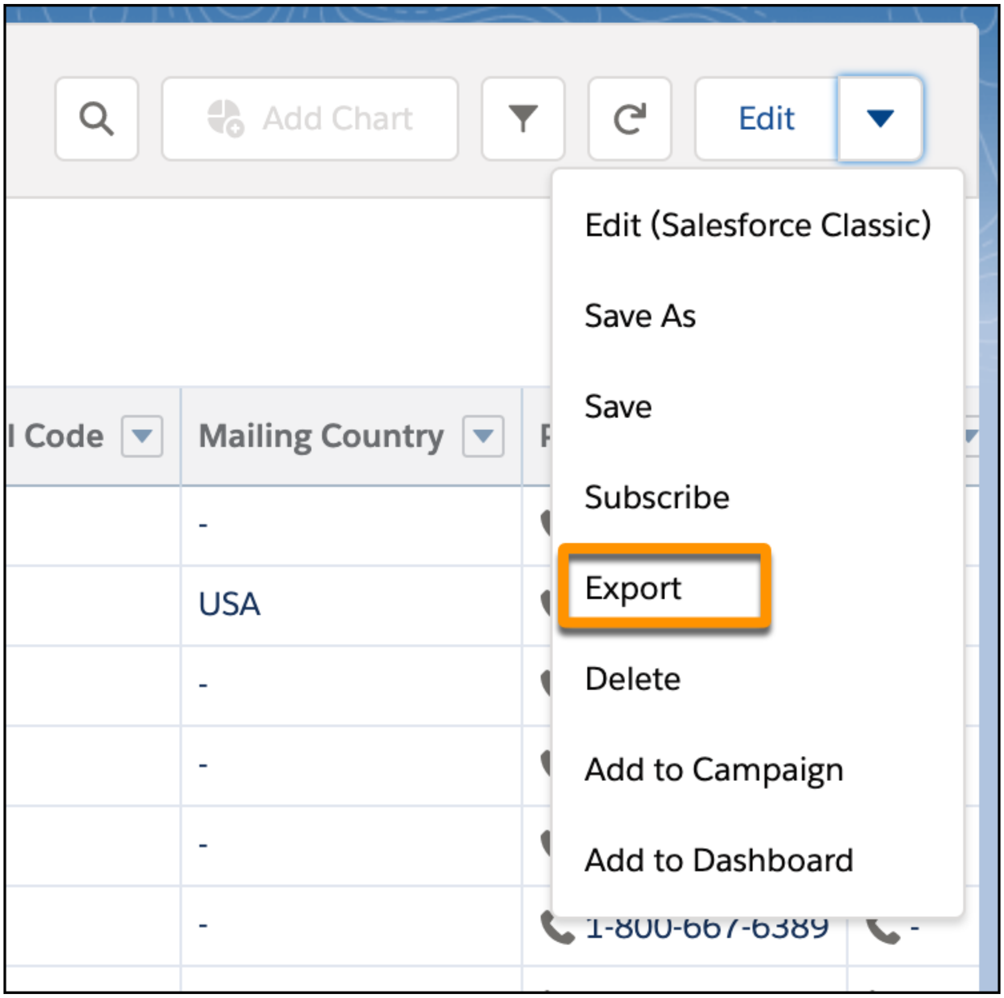
Before you migrate, clean up your data. For example, look for outdated information and duplicate records.

To export contacts, create a custom report type using Contact as the primary object. You use this report to create a .csv file that you can import into Essentials.

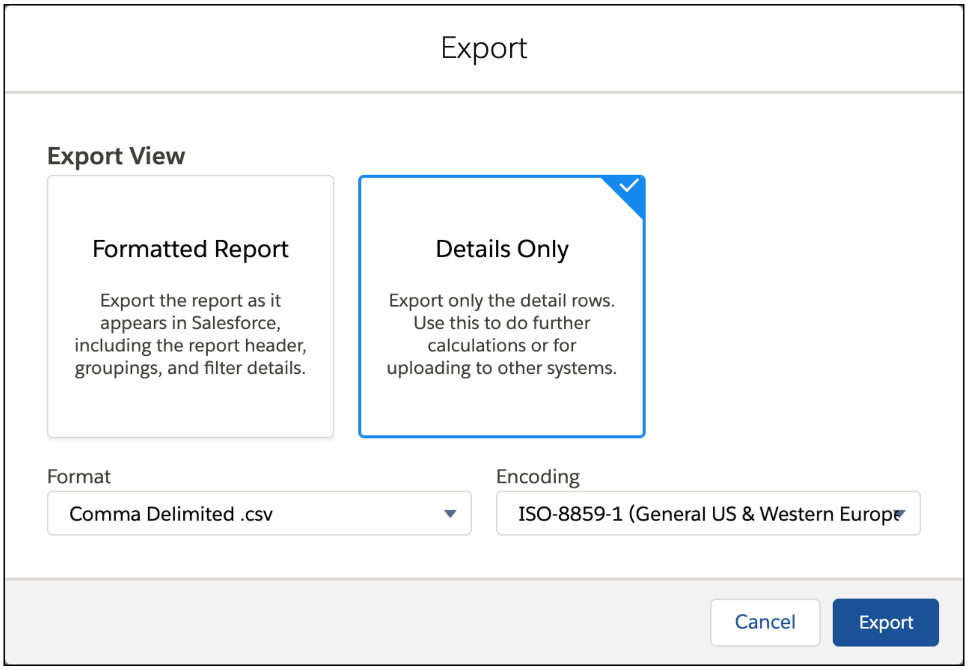
To migrate data to Essentials, create and export a report for each object that you want. Follow these steps for accounts, contacts, and leads.

1. From the Reports tab, click **New Report**.
2. Select an object.

   You can create a single report for both accounts and contacts. Include all the fields that you want to import from both objects.
3. Click **Continue**.
4. In your report, include the required fields and any additional fields that your company uses.
   - For accounts, the Name field is required.
   - For contacts, the Last Name field is required.
   - For leads, the required fields are Company, Last Name, and Status.
5. Click **Save & Run**.
6. Give your report a name and click **Save**.
7. From the menu, click **Export**.



8. Select **Details Only**.
9. Under Format, select **Comma Delimited .csv**.



10. Click **Export**.
11. Repeat the previous steps for each object you want to import into Essentials.
12. Import your .csv files into Essentials from **Setup** > **Integrations** > **Data Import Wizard**.

Note: Use matching to prevent duplicates when you import your data into Essentials.

- Accounts: Match account by **Name & Site**.
- Contacts with emails: Match Contact by **Email** and match Account by **Name & Site**.
- Contacts without emails: Match Contact by **Name** and match Account by **Name & Site**.

SEE ALSO:

Import Data with the Data Import Wizard

Migrate Your Opportunities, Tasks, and Events to Essentials from Other Editions

Use reports to set up your opportunities, tasks, and events for import into Salesforce Essentials.

Before you migrate, clean up your data. For example, look for outdated information and duplicate records.

To migrate data to Essentials, create and export a report for each object that you want.

Tip: We recommend filtering your reports so that you have some .csv files that contain customer email addresses and some that don't. Email is the most accurate way to import your data into Essentials because email addresses are unique to each customer.

Follow these steps for opportunities, tasks, and events.

1. From the Reports tab, click **New Report**.
2. Select an object.

   Create four reports for opportunities:

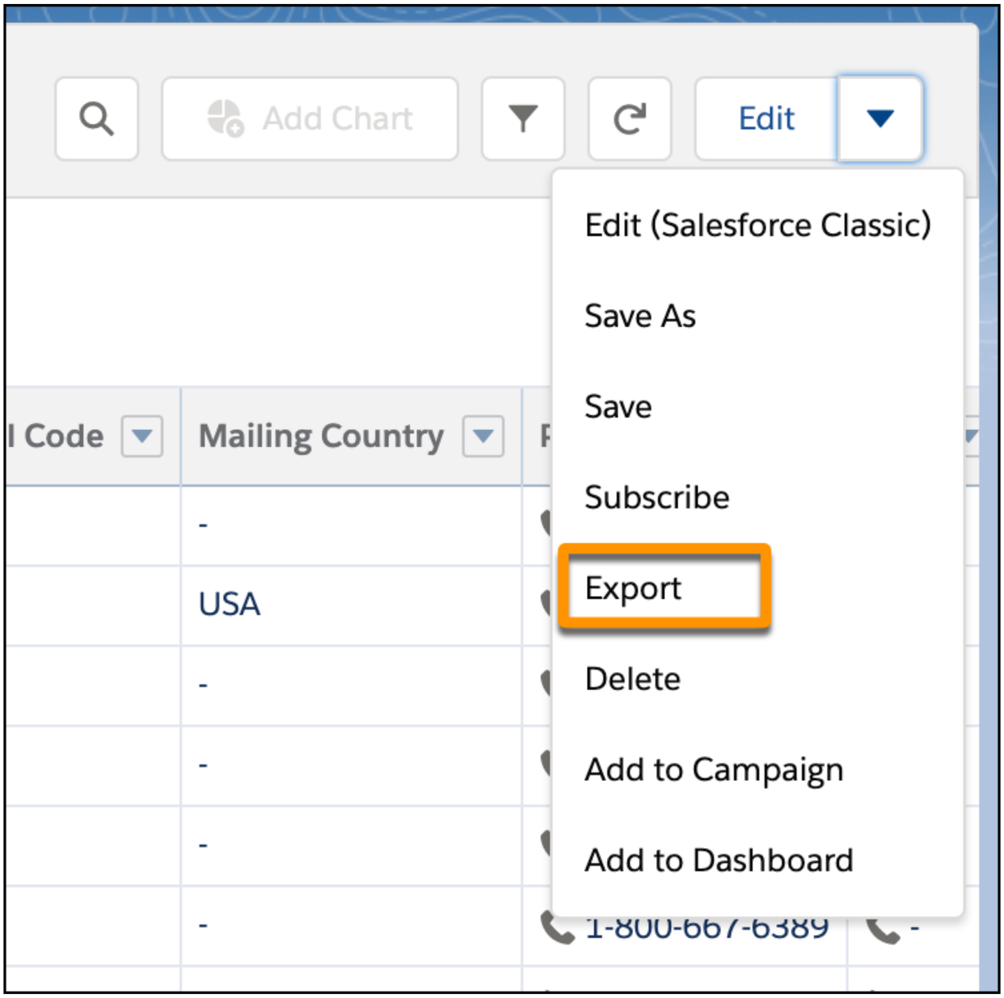
   - Opportunities with accounts

- Opportunities with contacts (After exporting the report, use filters to create one .csv file that includes email addresses and one that doesn't.)
- Opportunities with leads

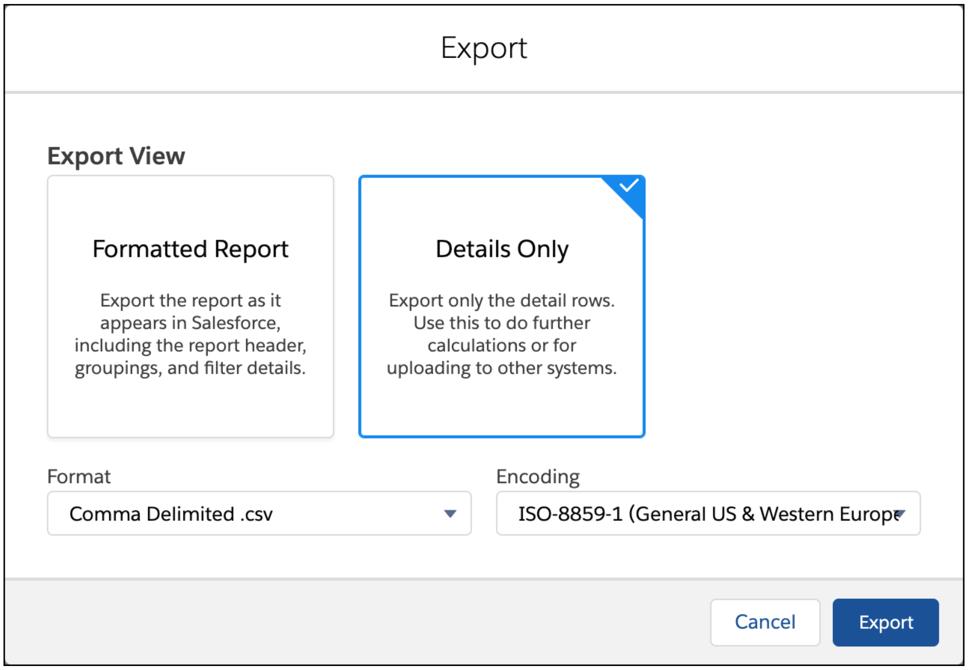
Create one report for both tasks and events with the objects you use, including accounts, contacts, opportunities, and leads. After exporting the report, use filters to create .csv files for:

- Tasks with other objects, with emails
- Tasks with other objects, without emails
- Events with other objects, with emails
- Events with other objects, without emails

3. Click **Continue**.
4. In your report, include the required fields and any additional fields that your company uses.
   - For opportunities, the required fields are Name, Stage, and Close Date.
   - For tasks, the required fields are Assigned To, Subject, Status, and Priority.
   - For events, the required fields are Assigned To, Subject, Start, and End.
5. Click **Save & Run**.
6. Give your report a name and click **Save**.
7. From the menu, click **Export**.



8. Select **Details Only**.
9. Under Format, select **Comma Delimited .csv**.



10. Click **Export**.
11. Repeat the previous steps for each object you want to import into Essentials.
12. Import your .csv files into Essentials using Dataloader.io.

Tip: Keep the following guidelines in mind when you import your .csv files using Data Loader.

- Essentials can use only Batch API.
- Use **Insert** for a first-time import and **Upsert** when you already have data in your Essentials org. Upsert means that you're updating existing information with what's in your .csv and adding any new information that's on your .csv file but not in your org.
- To import opportunities associated with contacts, insert using Opportunity Contact Role. Look up the primary contact by name or email depending on which .csv file you're using.

SEE ALSO:

Dataloader.io: Importing Data Into Salesforce

Keep Track of All the Details with Accounts

Accounts keep track of contact information and details for any business, customer, or provider that you work with.

Why Do We Use Them?

Accounts make it easy for anyone in your business to find a customer or business partner's contact information.

Why Are They Important?

Keeping important details handy for contacting customers and providers makes your outreach effective and efficient. Accounts also make it easy to see when you have more than one deal in the works as well as previous transactions with a customer.

SEE ALSO:

View and Convert Leads on an Account

Fill Account Fields Automatically

Things to Know About Accounts

Know Exactly Who You're Talking to with Contacts

Contacts are individual people you communicate with to move a business deal forward. If you work with other businesses, Contacts are associated with Accounts, or companies you're doing business with.

Why Do We Use Them?

Human-to-human conversations create, transact and close business deals. (The robots haven't taken over yet). Contact records help you track all of the conversations and transactions you've had with another person.

Why Are They Important?

Tracking your communication with another person ensures that you don't repeat yourself, bombard a prospective customer with emails, or otherwise hinder a positive experience. You can know exactly where you stand with this person by reviewing their contact record.

SEE ALSO:

Manage Contacts

Things to Know About Contacts

Close More Deals with Leads

Snag a business card or see some new opt-ins for your newsletter? Those are leads, or customers who are interested in your product or service.

Why Do We Use Them?

It's much easier to make an interested person a purchasing customer with marketing and outreach efforts. Even if they don't purchase after your first attempt, keeping their contact info in Salesforce means that you can easily try again.

Why Are They Important?

Customers take time to go from discovering your product to purchasing it. While getting to know your business, these potential customers are called leads until they show they are likely to purchase. Separating potential customers from your likely-to-purchase ones in

Opportunities and Accounts keeps your reports accurate and makes it easy to spend your marketing budget and time on the right customers.

SEE ALSO:

Manage Leads

Things to Know About Leads

Leads FAQs

Track Your Open Deals with Opportunities

Opportunities are business deals in progress. Track progress by moving each opportunity through a series of business milestones called stages, like Prospecting, Proposal Sent, Negotiation, and Contract Signed. The goal is to "win" the opportunity, or move it to a final stage that represents a successful outcome for your business.

Why Do We Use Them?

Opportunities let you visualize potential future revenue and business success. Opportunities also represent how your sales representatives are spending their time and can provide valuable insights for coaching.

Why Are They Important?

Opportunities are the core of your business' success. If you win opportunities, your business grows. You can create reports to understand why opportunities are won or loss to improve your sales process for the future.

SEE ALSO:

Manage Opportunities

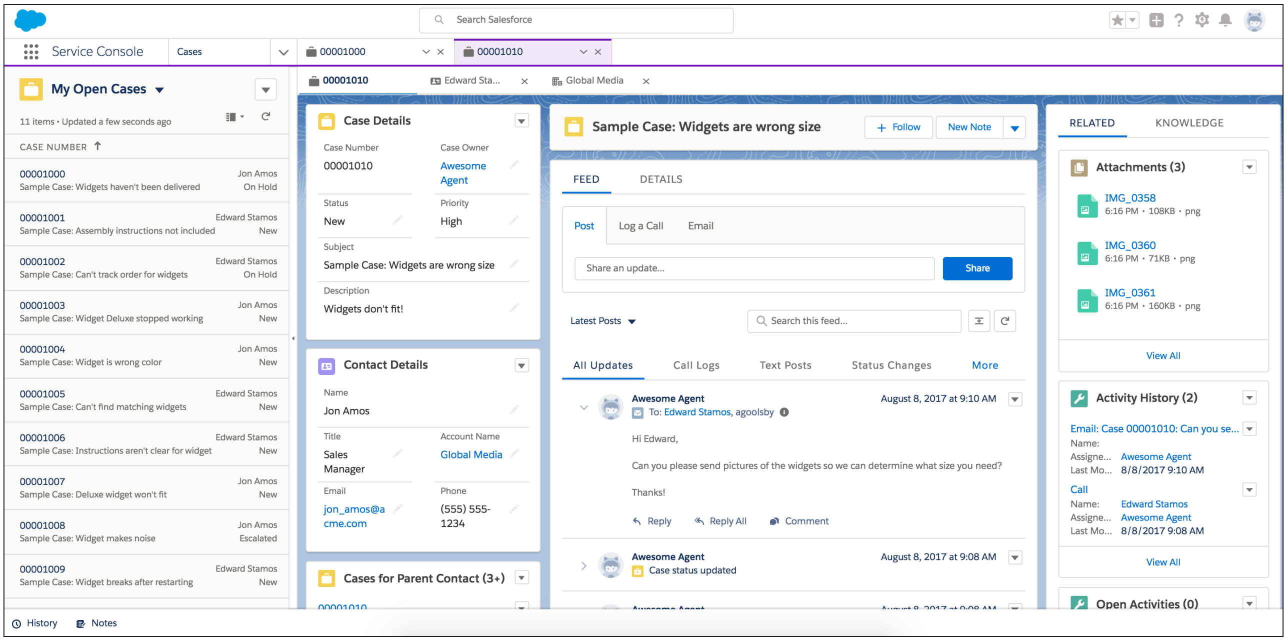
Things to Know About Opportunities

Track and Solve Customer Issues

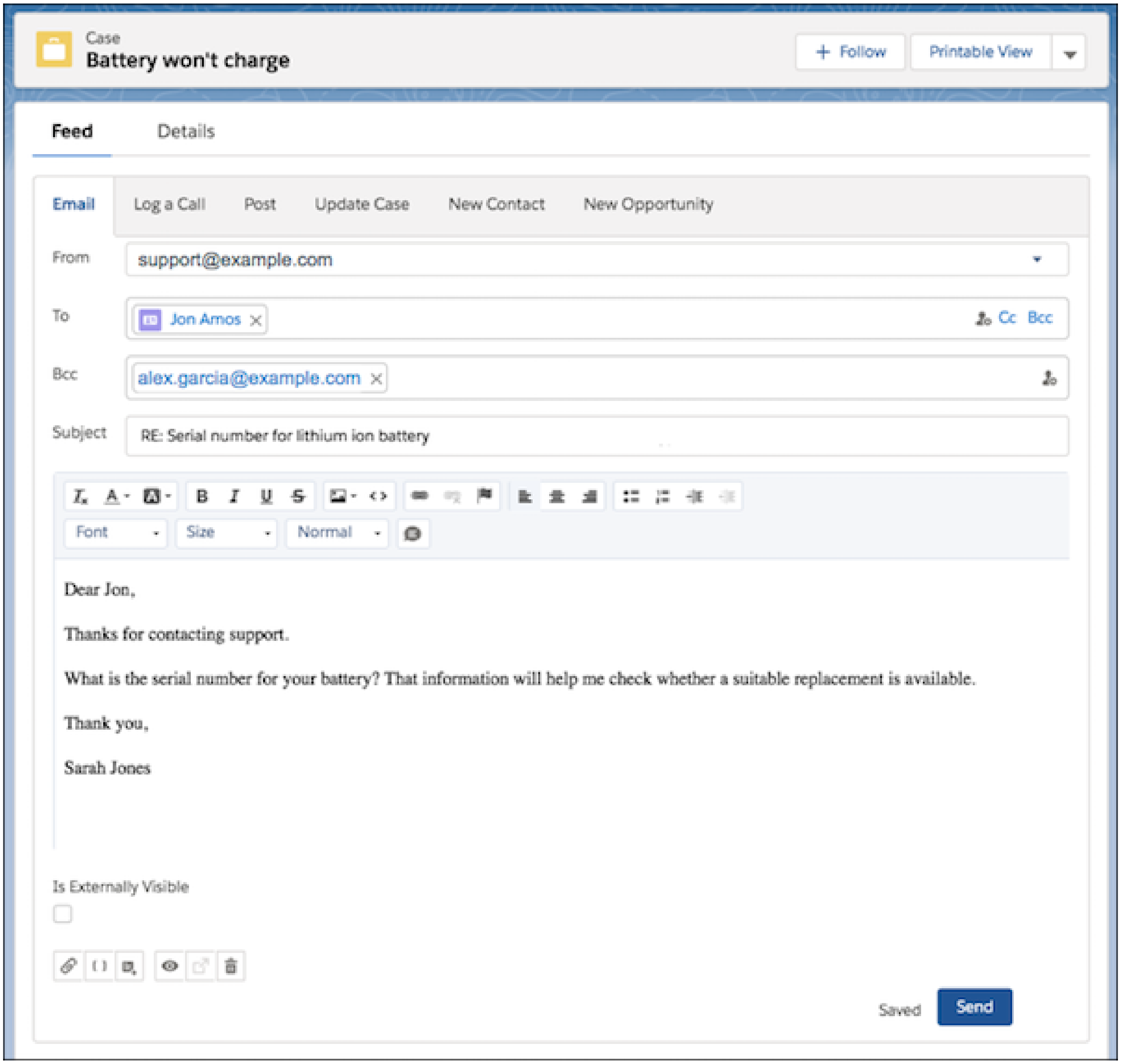
Use cases to track customer feedback and issues. In Salesforce, all the information you need to solve the issue is right in front of you with related contact information, past cases, articles, and more. Say goodbye to jumping from tab to tab and close cases faster.

Why Do We Use Them?

Cases unify the information about a customer, including account, contact, product, and history data, so your team can have all the necessary information at hand. The case feed shows updates about the case's progress, so anyone on your team can pick it up where you left off.



You can respond to customers right from the case using email. If the case is from a known customer (whom you've saved as a contact), then you can email them right from the case feed. You can also respond in the case feed if the customer reached out on social media and you get cases logged automatically from posts, direct messages, and tags.



Why Are They Important?

You and your team can more quickly identify customer pain points and address them while delivering quality service.

SEE ALSO:

- Set Up Cases for Your Team
- Manage and Work with Cases
- Things to Know About Cases

Set Up Basic Case Management in Salesforce Essentials

Cases are the foundation of customer support in Salesforce. You can set up a case management system that lets you collect cases and assign them to your team with no manual oversight.

Collect Cases

You can let cases come to you automatically from your email, social media pages, help center, or web form on your company's website. If you're well-versed in all things Salesforce, you can use a flow to provide a more customizable way for customers to log cases.

What You Can Do	Where To Learn More
Get cases from emails to your support email address.	Turn Emails and Social Media Posts into Cases
Get cases from a web form that you place in your website.	Provide Web Forms
Get cases from your help center.	Create a Self-Service Website
Get cases from posts and messages to your business Facebook, Twitter, Instagram, and YouTube pages.	Turn Emails and Social Media Posts into Cases
Get cases from customer interactions.	Phone (Add-On) Chat & Messaging (Add-On)
Get cases from a custom flow (advanced).	Flow Builder Embedded Service for Web in Setup

Assign Cases to Your Team

Use queues and automated rules to get cases assigned to your team without monitoring your case list.

What You Can Do	Where To Learn More
Assign cases to a queue, where certain members of your team can choose cases from a list. Queues can help your team prioritize work, too.	Set Up Queues
Auto-assign cases to queues or people on your team with conditional rules. You can also use rules to send email notifications when new cases are created or assigned.	Set Up Assignment Rules
Escalate cases based on criteria like priority, associated account, age, and more. You can set multiple criteria and use filter logic to get as specific as you'd like.	Set Up Escalation Rules
Assign cases to your team automatically based on your team's availability and the priority of the work.	Route Work with Omni-Channel

Automate Your Case Management Process (Advanced)

Bake even more automation into your case management process with auto-response rules and Process Builder.

What You Can Do	Where To Learn More
Send an auto-response to customers when a case is logged for them. You can let them know that they'll hear from your team soon, send them troubleshooting tips, or other relevant information.	Set Up Auto-Response Rules
Create a process to automate your regular work duties.	Process Builder

Note: You can have up to five processes with your Essentials subscription. Use them wisely!

5 Easy Ways to Keep Your Customers Happy

The MVPs of successful businesses are their loyal customers. Repeat customers are more likely to buy from your business a second time as well as spread the word about it to new customers. It also costs less to retain them than it does to acquire new customers. So here are some ways to get started.

What to Do	Details
Make communication a top priority	Customers have high expectations about the speed and frequency of communication. The first step is setting expectations for yourself or your team. Get aligned on getting back to customers within a day or less to build trust and keep customers up-to-date. Whether by tweet, text, DM, or email, keep your customers updated if they've asked a question or logged a case. It's a great opportunity to turn an issue into an awesome customer experience.
Make it easy to find help	Many customers prefer self-service solutions over speaking with support. Write knowledge articles for the features, products, or services that people often ask about to reduce inbound emails and let your customers help themselves!
Set realistic expectations	Make claims to customers about the quality and features your product that you can deliver. Unmet expectations can break trust, so it's key to be truthful and transparent.
Take to your customers like real people	Skip the marketing speak and technical terms when you're talking to customers. They appreciate your candid advice and you can resolve their questions faster.
Create moments of connection	Whenever you can, show the customer that you care. Whether it's a personalized message on their birthday or a coupon code around the holidays, let them know you're grateful for their support.

How to Talk to Your Customers Like Real People

If your customers have a question or concern, they come to you for answers. Skip the customer-service speak and use phrasing that shows you care. Build trust and help them focus on solutions.

New customers on the verge of purchasing and customers that are devoted fans look to you for answers if something goes wrong. Such interactions can be the reason a customer comes back for more or heads out the door. So here are some tips to keep the conversation flowing.

Tip	Details	Instead of This	Do This
Get to the point	Customers want you to tell it to them straight. To sell them a product or service, give them a real-life example of success that relates to their business. When you troubleshoot a problem, tell them what went wrong and how you can fix it. Customers are short on time and appreciate it if you are direct and candid.	"It looks like it's just a hiccup with our servers. This never happens. We always rank at the top of the list for companies in our industry."	"Our system doesn't recognize your password. Let me sign in for you to reset it."
Meet them where they are	If a customer is upset or angry, chances are that they just need someone to listen. Let the customer explain what's wrong and repeat their main points back to them in a calm, understanding tone. That way, the customer knows their frustration is heard and you're ready to fix it. It's also hard for them to respond in a loud, angry tone when you're being cool and collected.	"Well, if you can't login, you probably entered your password incorrectly. Try it again."	"From what you said, it sounds like you're having trouble logging in. If you'd like, I can reset that for you or give you a new password."
Be transparent	If things are a little complicated to fix, let the customer know upfront. If adding new features will cause the final cost to increase, make that clear. Avoid wasting customers time and be clear that you are there to help.	"Adding that new security feature could increase your bill by a little bit, but it won't be too bad."	"If you add the security features, your monthly contract will be $5.00 per month. You get the added security of knowing exactly who's logging in and 24/7 password recovery."
Know the details	Learn a few things about the customer's account before you get on the phone with them or bring up their info as you work through their case. Give personalized advice. It's is a great way to show them you know your stuff and that you care about their business.. In Salesforce, the Activity Feed is your one-stop-shop for the key	"Tell me a little bit about your company so I can help you."	"I see your company specializes in web design and you've been growing fast. Have you been using sales stages to keep deals moving through your pipeline?"

Tip	Details	Instead of This	Do This
	details, which is key when you're short on time.		

When a customer has questions, be respectful, empathetic, and most of all, human. Make a genuine connection and provide the answers that they need.

Get the Details You Need with Custom Fields

Capture all the data that's important to your business by adding custom fields.

Why Do We Use Them?

Every business has it's own set of terms and details it needs to capture. For example, a clothing designer may need to know height and weight wheras a mechanic needs the make and model of your car. Adding custom fields to your records allows you to capture information that goes beyond the basic name, email, and address fields that are included in every Salesforce record.

Why Are They Important?

Adding fields to your records reminds you to capture those details when you speak to a customer or partner. It also helps you keep important information in a single place, saving time and making it easier to find the information you need.

SEE ALSO:

Create Custom Fields

Keep Tabs on Every Detail with Reports

See how your business is doing, make better purchasing decisions, and keep tabs on your progress with reports.

Why Do We Use Them?

Reports help you feel confident about the decisions you make by backing them up with data. They also provide a record of your business' progress over time, so you can see any changes that affect your bottom line.

Why Are They Important?

Reports show whether you're on the right track or if you need to make a change. From specific details about how your sales are going to stats on customer cases, reports can look at your business from every angle you need.

SEE ALSO:

Reports and Dashboards

Creating and Using Reports

Track Your Progress with Dashboards

Take a look at how your business is doing in a single glance with dashboards. You select the metrics that matter and Salesforce brings the data to life with graphs, charts and more.

Why Do We Use Them?

Your business has a lot going on. With dashboards, you get to see it all at a glance so making data-driven decisions is simple and easy.

Why Are They Important?

With dashboards, you get that big picture view of your business without having to dig through individual reports. With all of the parts of your business coming together in a single place, you can see how they affect one another as well as your bottom line.

SEE ALSO:

Reports and Dashboards

Creating and Using Dashboards

Getting Around in Salesforce Essentials

Learn how list views can help your and your team manage your customer information and be more productive. Get to know the utility bar to help your team be more productive.

Manage Your Essentials Subscription

Add or subtract users, update the credit card on file, and more from the Manage Subscription page in Setup.

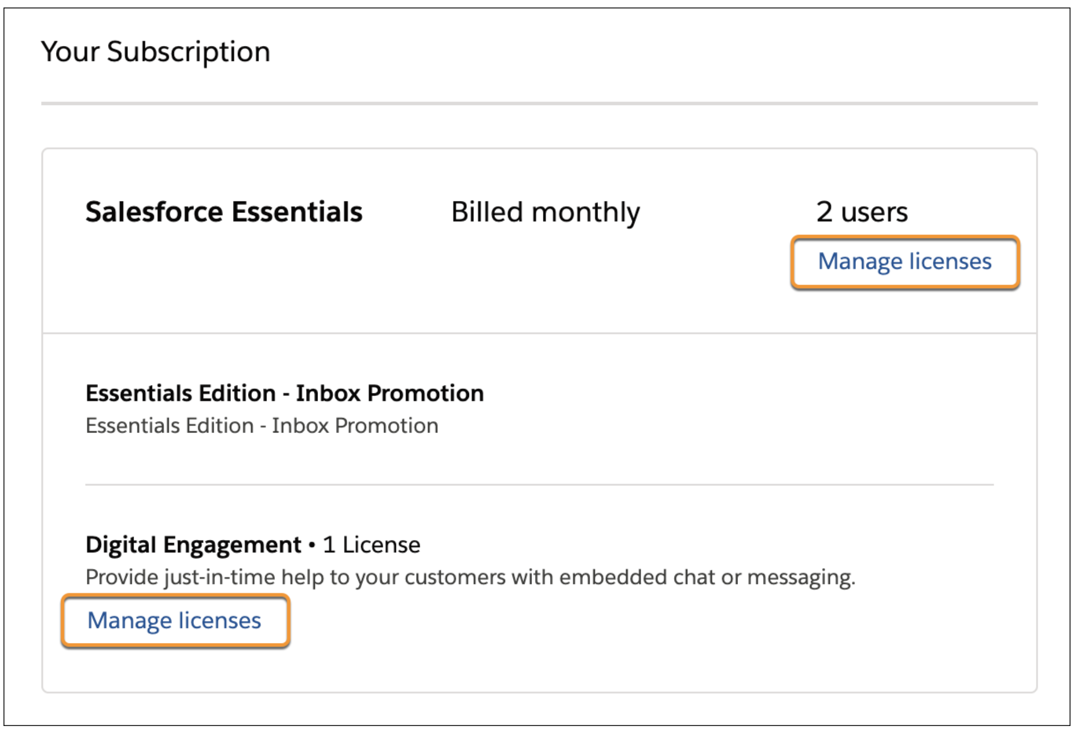
You can find the Manage Subscription page from the gear icon.

The following is a list of all actions you can take on this page.

Note: To upgrade your subscription or switch between monthly and annual billing, reach out to your Account Executive. To find his or her contact information, log into store.salesforce.com and look under **Your Account Contact**.

Add or Subtract Users

To change the number of user licenses you're paying for, click Manage licenses. This option is available for your overall number of users, and the number of users able to access certain paid add-ons.



Your add-ons and extra features appear in the Your Subscription section.

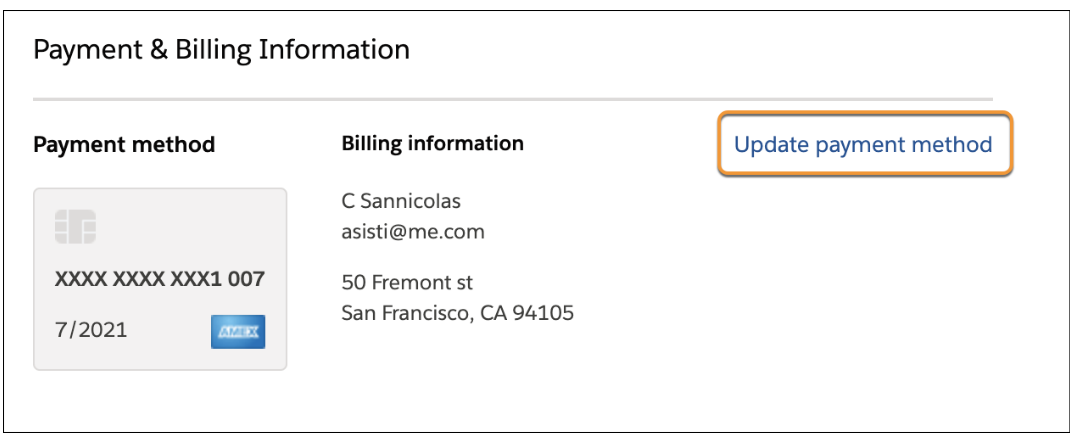
What You See	What It Means	More Info
Essentials Edition - Inbox Promotion	As an Essentials subscriber, you can enjoy Inbox at no charge. Inbox lets you integrate your email and calendar with Salesforce.	Set up Inbox

What You See	What It Means	More Info
Digital Engagement	Your first chat license is free with Essentials. As you add users, the option to add more chat licenses appears here.	Offer Live Customer Support with Chat and Messaging
Dialer for Essentials	Create a phone in Salesforce that lets your team take and make calls from one phone number.	Phone Options in Salesforce Essentials
Sales Dialer	Create a phone in Salesforce with additional features, like multiple phone numbers, personal voicemail, and more. Contact Salesforce to purchase this add-on.	Phone Options in Salesforce Essentials
File Storage	Add more file storage beyond the 1 GB allotted.	Data and File Storage Allocations
Data Storage	Add additional data storage beyond the 10 GB allotted.	Data and File Storage Allocations

After you add users, your bill is updated and your user licenses are active within about 30 minutes. After you subtract users, your bill is updated at the start of the next billing cycle. This could be the next month (monthly billing) or the next year (annual billing).

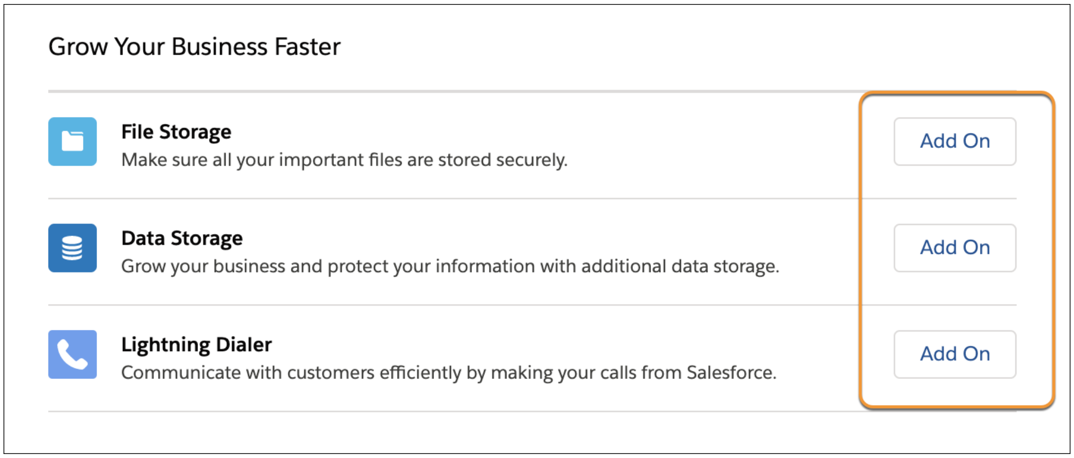
Update Your Credit Card on File

If you've missed a payment due to an expired credit card or have another need to change your payment method or billing address, click **Update payment method**.



Add More Features

You can purchase add-on features that expand what you can do with Salesforce. Click **Add On** next to the feature.



Cancel Your Subscription

There's a cancellation button at the bottom of the page. Indicate why you're leaving us, then click **Cancel Subscription**. This cancels the auto-renewal at the next billing cycle, either next month (monthly billing) or next year (annual billing). Your account remains active until then.

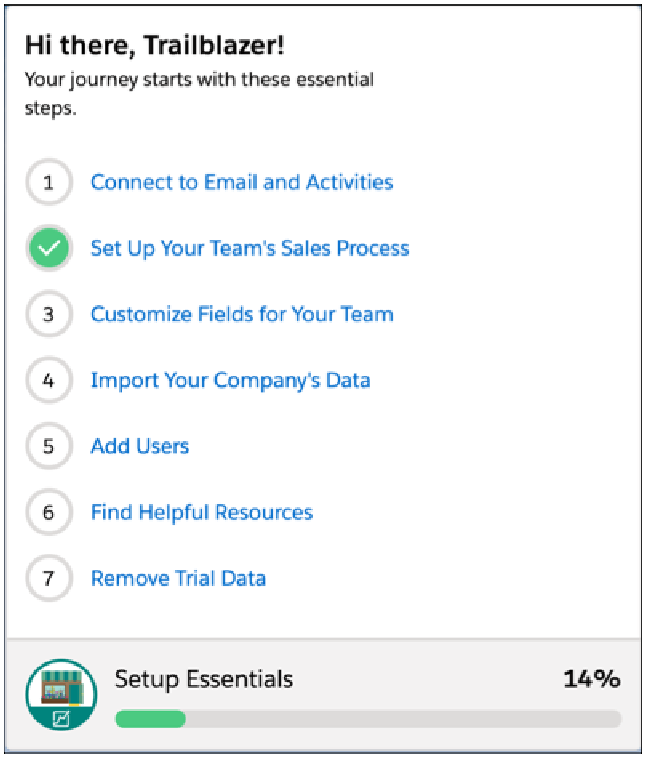
Get Started with the Setup Assistant

Get up and running fast with the Essentials Setup Assistant. Use this to-do list to make sure you've completed the most important steps to grow your business.

The Essentials Setup Assistant a prioritized list of the tasks that will help you get the most out of Salesforce. From adding users to editing records, the setup assistant gets you moving on the path to success.

Where to Access the Setup Assistant

You can find the Setup Assistant by clicking on the Home tab in Sales Essentials.

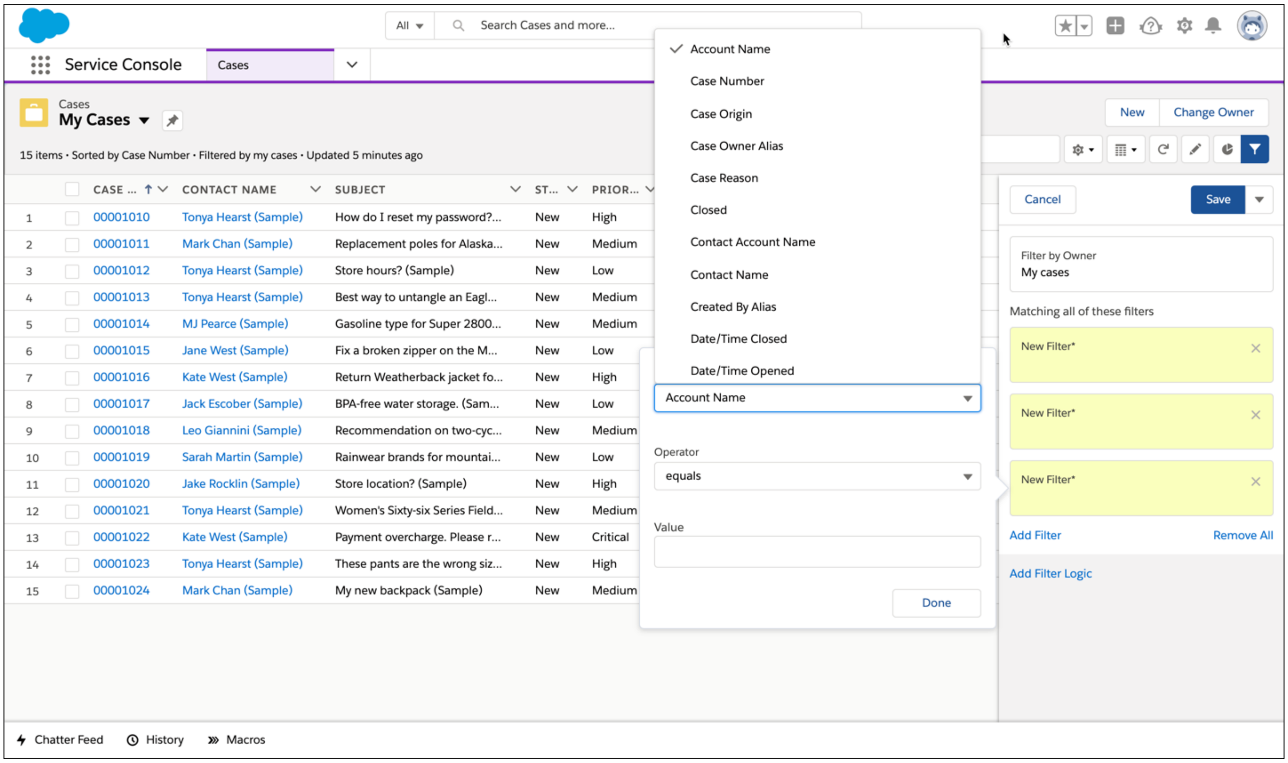


Filter Your Lists to Find What You Need

Use a list view to see a filtered list of records, such as only contacts, accounts, or custom objects.

Why Do We Use Them?

You can use a list view to go over your sales and service records with different filters.



Why Are They Important?

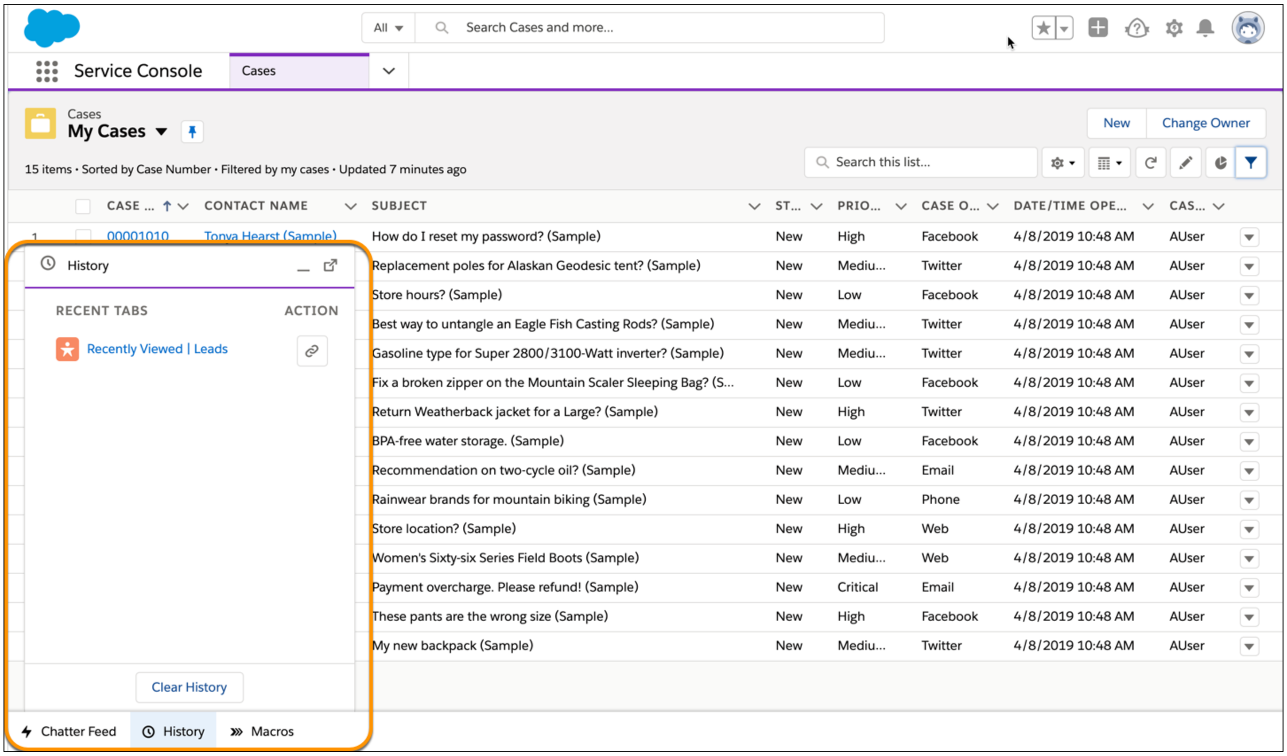
You can view just what you want and nothing more.

SEE ALSO:

- Create a List View
- Pin a List View
- Edit List View Filters

Keep Your Productivity Tools Handy

The utility bar is a fixed footer where you can quickly access handy utilities and common productivity tools. Your admin can also add custom options.



Why Do We Use It?

The utility bar provides access to different utilities and productivity tools in one place.

Why Is It Important?

By having everything you need to be productive in one place, you and your team can be more efficient and save time doing tasks.

SEE ALSO:

Customize Your Console with Utilities

Set Up the Most-Used Features

Get more done in less time by setting up your sales pipeline, automatically turning incoming emails and social media posts into cases, utilizing self-service, and adding a phone.

Customize Salesforce Essentials

Salesforce Essentials provides standard and customizable tools to suit your unique business needs. Need to see a to-do list when you start your day? Don’t have a full-time staff member to run your help center? Have unique metrics you’re holding your support staff to? We’ve got brainstorming questions and best practices around customizing Essentials to meet your needs.

Make Selling Simple with Sales Stages

Sales stages help you organize how your business closes a deal, starting from lead creation and going all the way through closing an opportunity.

Sync Emails and Activities

Automatically bring your business emails and events into Salesforce with Einstein Activity Capture. Then your deals, cases, and contacts will show any related emails and events.

Offer Customer Support in Essentials

Salesforce Essentials makes offering customer support easy. Track and solve your customers' issues with cases, so nothing slips through the cracks. Keep your customers happy with self-service, live web chat and messaging, and phone support.

Let Your Customers Help Themselves

Give your customers the gift of self-service. When your customers can answer their own questions, your team can spend more time making deals and solving bigger customer issues. Write and organize articles with Knowledge that provide information about your business and answer common questions. Serve up your categorized articles in a help center so your customers can find exactly what they need. If they have a question that requires human intervention, they can log a case to your team. (Or if you're feeling spiffy, you can offer live chat, too).

Turn Emails and Social Media Posts into Cases

Use Email-to-Case to turn incoming emails to your support email address into cases in Salesforce. Social Customer Service automatically creates cases for social media mentions, posts, or direct messages from your company's Facebook, Twitter, YouTube, and Instagram pages. Set up Email-to-Case, Twitter, and Facebook with guided setup flows.

Use a Phone in Salesforce

A phone lets your team take and make calls alongside their other work in Salesforce. You can create a phone with Salesforce using Sales Dialer or Dialer for Essentials, or you can integrate a third-party phone product.

Get the Most from Tasks

Tasks are to-do list items that help you keep track of your workload and meet important business objectives. If you're an individual contributor, you can use task reminders to stay on top of upcoming deadlines. If you're a manager, you can use tasks to align business processes and monitor productivity.

Customize Salesforce Essentials

Salesforce Essentials provides standard and customizable tools to suit your unique business needs. Need to see a to-do list when you start your day? Don't have a full-time staff member to run your help center? Have unique metrics you're holding your support staff to? We've got brainstorming questions and best practices around customizing Essentials to meet your needs.

Customize the Home Screen

When you first open Salesforce, to get a birds eye view into the health of your business, you can choose the insights to showcase on your homescreen.

Make a Few Decisions

1. What is the first thing I want to see when I open Salesforce?
2. What information helps me keep my finger on the pulse of my company? Reports, tasks and events are among the most popular.
3. Have I completed all the steps under Hi there, Trailblazer? If so, remove it from the Home Screen to make room for other information.

Customize Your List Views

Filter your records to help you work more efficiently. Create custom list views so you can segment your data to focus on the right customers and business deals.

Make a Few Decisions

1. What information do I need to an up to date list of often?
2. How do I segment my records? For example: Which leads do I prioritize? What opportunities have the most value?
3. If I want to segment customers by custom data, what custom fields should I add to records to filter by?
4. What list view do I want to see when I open accounts, leads, or opportunities?

Best Practices

1. Don't delete the default view of all records. This way, you have them if you need them.
2. Pin the list view of records you want to see when you first open the page to make it the default.
3. Use list views to send list emails to customers in bulk.

Customize your Reports and Dashboards

Data is key to measuring your success. Create reports and dashboards that help you keep an eye on key initiatives and outcomes.

Make a Few Decisions

1. What insights do I want into my business?
2. Where do I spend money and is that the best use of my funds?
3. How effective are my sales and support people? Do I hit my quotas?
4. Are my customers happy?
5. What fields should I add to my records to enhance my reports?

Best Practices

1. Attend the Salesforce Essentials workshop on creating reports and dashboards.
2. Consider tying compensation to Salesforce reports, so employees are more motivated to work in the app and to complete records.

Customize your Help Center

You can support your customers with a self-service Help Center. Reduce your support ticket queue by answering customer questions using public-facing knowledge articles.

Make a Few Decisions

1. What are my customers' frequently asked questions?
2. How can I categorize content so customers can find it quickly?

Best Practices

1. Host an internal knowledge base as well as a customer-facing one to display in your help center.
2. Choose an article editor and set up a review process. You can document reviews in your internal knowledge base.
3. Start with a single category of articles, like frequently asked questions, and scale as you go. You can always add extra categories.
4. Mine the content you already have, such as webinars, slide decks, and one-pagers. Turn that content into articles.

Customize your Opportunity Stages

Closing a deal or earning revenue takes a series of business milestones to achieve. Steps might include a discovery session to determine the customer's needs, a presentation on how your product or service can benefit the customer, delivery of the business contract, and contract negotiations. Create custom opportunity stages to tailor the pipeline to your unique use case.

Make a Few Decisions

1. What is my sales process from start to finish?
2. What are the business milestones I want to monitor?

Best Practices to Consider

1. A stage is a business milestone. A task is a step you take to achieve the milestone. For example, a stage is when you make a discovery call to find out a customer's needs. A task for that stage is to schedule the call.
2. Use path guidance to add up to 1,000 characters of instruction on how to successfully achieve an opportunity stage.

SEE ALSO:

Set Up the Lightning Experience Home Page

Create or Clone a List View in Lightning Experience

Customize Fields

Reports and Dashboards

Essentials Reporting and Dashboards Workshop

Give Customers Access to Your Knowledge Base Through Help Center

Guide Users with Path

Make Selling Simple with Sales Stages

Sales stages help you organize how your business closes a deal, starting from lead creation and going all the way through closing an opportunity.

Why Do We Use Them?

Creating sales stages means that you have a process to follow every time you work with a customer. That way you can be sure that every customer gets an all-star experience when they purchase your product or services.

Why Are They Important?

By creating custom sales stages, your sales process reflects your business, making it easier to sell to customers and close more deals.

Want to see it in action? Our 1-mnute feature tour will show you how it all works. Watch the tour: Set Your Sales Process (1 minute)

How to Troubleshoot When Your Sales Are Down

When your team's sales aren't on target for a particular month, it can be difficult to find a solution. Follow our troubleshooting tips to help your team reach their sales goals.

Take Your Sales to the Next Level

An upward trend isn't only a time to celebrate—it's a time to refine the recipe for your team's secret sauce. A winning streak can turn into a long-term trend when you learn what's going well and why. Use these tips to help you keep up a winning streak.

Maintain a Healthy Sales Team

Your team succeeds when you invest in fostering a positive, happy work environment where everyone can succeed together. See our best tips for maintaining a healthy sales team that's mutually supportive and excited to make sales.

5 Sales Secrets from Top Sales Execs at Salesforce
Closing deals is crucial to growing your business. If you don't have tons of experience convincing customers to sign on the dotted line, don't worry. Here are some proven techniques from our top sellers at Salesforce.

SEE ALSO:
Trailhead: Leads & Opportunities for Lightning Experience

How to Troubleshoot When Your Sales Are Down

When your team's sales aren't on target for a particular month, it can be difficult to find a solution. Follow our troubleshooting tips to help your team reach their sales goals.

Problem: You're Not Winning Deals

A dip in your won opportunities, or won deals, can influence your overall sales.

Before you jump to conclusions, do a little research.

- Ask your team how the personalize their pitches to each prospect. Unless they're well-versed in what their prospect does and what they care about, they're missing an opportunity to delight them.
- Check if market conditions that are influencing your business.
- Check whether team members struggle to close their won opportunities. It might be a good time to update your training and materials.
- Make sure that your sales process is solid. Your team can have trouble keeping up with the steps to get their deals to the finish line.

Problem: Some of Your Teammates Don't Perform as Well as Others

A down trend in individual performance can be due to several factors.

For a small dip (under 5% for the month), make minor adjustments.

- See if sales decreased across the team or for individuals. A top performer may be burned out or having a hard time.
- Look for external factors such as a product issue, service issue, or change in your competitors.
- Improve your team training and provide more management reviews to provide continuous feedback and help the team maximize sales.

A larger drop in performance (somewhere between 5-10% for the month), indicates that it's a good time to bolster your sales team.

- Is your team in a rut? Help them find ways to freshen up or innovate their sales techniques.
- Prepare your team to give dynamic presentations and pitch to prospects anytime, anywhere so they don't miss opportunities. Save presentation slides, fact sheets, and other materials in a public folder and block off time for your team to practice their pitch.
- Do you have enough headcount? If your small team is overworked or your teammates are playing too many roles, their sales can suffer.

If the drop in performance could be related to high staff turnover, focus on building loyalty and retention.

- Try improving your new-hire training and implementing team feedback. New-hire training can be the positive first impression that builds loyalty and excitement in your growing team.
- Keep employees happy with programs like in-office perks, performance-based bonuses, and other incentives.
- Conduct an anonymous survey, lead a listening tour, or hire outside help to figure out why people leave.

Problem: Sales Are Getting Smaller

Sometimes your wins are high, but revenue per win declines.

When you notice a dip in your team's average sale size, you can make a few adjustments.

- Optimize your average price or SKU to give your customers more value.
- Revise your average list price or discounts.
- Coordinate sales efforts across your entire team to increase deal sizes.

If your average sale size is down significantly, focus on ways to increase sales size.

- Can your team clearly articulate the value your company brings when qualifying customers? Help them achieve this to make your customers more receptive to your message and to reduce price pushback.
- Consider bundling products.
- Focus your team's efforts on target opportunities that they can win.

Problem: Your Team Is Losing More Deals Than They're Winning

It can be discouraging to see more losses than wins in a month. Before you take it to heart, check on your process and customer relationships.

If you're losing opportunities, take a look at your sales process.

- Track which competitors are winning your prospective customers. Bonus points if you can also capture why.
- Make sure that your process includes dropping weak opportunities quickly so your team can focus on promising deals.

Take the opportunity to strengthen relationships with your current customers. If you prioritize revenue generation over customer service, your current relationships may suffer. Customer loyalty leads to continued support.

When your win rate needs a bigger boost, it's time to listen to your customers.

- Consider appointing a customer advisory board to help you understand and respond to what creates value for your customers.
- Implement a referral program for your existing customers to help you connect with the right decision-makers at new companies.

Problem: New Opportunities Are Scarce

It's hard to find that sweet spot of having a few deals on the table without spreading your team too thin.

With a small decrease in opportunity volume, figure out why and nip it in the bud.

- Look for any external factors that caused your team to focus on fewer opportunities.
- Make sure that your team employs the right narrative and provides valuable insights on their first contact with prospects. If they don't spend enough time on the phone, they might not be making a strong impact with leads and prospects.

For a significant decrease in opportunity volume, keep digging.

- Check if your sales are dropping. Fewer opportunities in the mix could be the culprit.
- Help your team employ a variety of methods to break through to prospects, and equip them with your own data to leverage as they acquire new customers.

Keep in mind, too, that fewer opportunities can be due to fewer leads to qualify. Check on the health of your sales pipeline, from marketing and lead generation to closing deals.

Problem: Your Team Is Taking Too Long to Close Deals

When you leave a deal in limbo, you leave money on the table.

If your team takes a little longer than usual to close their open deals, figure out why.

- Check for issues with your sales stages. If your stages don't accurately reflect your team's workflow, your teammates could be struggling to track their efforts.
- Make sure that your team might is closing their deals in Salesforce as soon as the details are hammered out.
- Implement consistent reviews of your sales pipeline and momentum. Help them to review and improve their processes.

A big increase in days to close can mean that your longer sales period contributes to a decline in closed won opportunities and total sales.

- Avoid complicating your sales process and look for ways to decrease the number of stages or the number of days per stage.
- Schedule regular reviews of stalled opportunities and support your team as they resolve their challenges.

Problem: Your Team Is Entering Data Incorrectly

Heads up! When any metric changes considerably, it's likely a data-quality problem. Your sales could be better than they look.

If you suspect a data-quality problem, make sure that everyone on your team is entering and classifying opportunities in the same way and on time. Double-check your field mappings and filters so that your reports and dashboards properly display the information you need.

If you're still stumped, you can always contact us for help. Our business and success coaches are happy to help you figure out what's going wrong.

Take Your Sales to the Next Level

An upward trend isn't only a time to celebrate—it's a time to refine the recipe for your team's secret sauce. A winning streak can turn into a long-term trend when you learn what's going well and why. Use these tips to help you keep up a winning streak.

Capture Your Team's Winning Ways

If your won opportunities and overall sales are really on a roll, awesome job! While you bask in your team's success, keep a record of everyone's tips, lessons, and sales materials so team members can benefit from each other's wins.

Keep the momentum going.

- Encourage your team to share sales tips and provide feedback about your sales process. They may have key stories or data that they use to impress prospects.
- Save sales presentations and fact sheets in a public folder where anyone on your team can access them.
- Ask your team to share lessons learned from deals they didn't win. Veterans and new hires alike can benefit from an open discussion about mistakes.
- Share customer feedback with the team. Show them how they help customers with a shoutout for a job well done.

Scale Your Success

A small rise in won opportunities is a great sign that your team is doing something right. Find ways to scale and pinpoint how you do it.

Automate some tasks.

- Set up a clear sales process to guide your team through qualifying leads, sending quotes, and closing open deals.
- Point out best practices and tips, so the team can keep learning.
- Create email templates for the most common interactions with customers and prospects.

- Ask your team to sync their emails and calendars with Einstein Activity Capture to eliminate manual entry of contact information, upcoming meetings, and more.
- Create a flow for your team to request approval to offer discounts or request travel budget to visit a customer.

Gain Insights from Your New Customers

Your new customers can give you a ton of useful information about what you do well. Listen and share their insights with your team.

Learn why your customers choose you.

- Help your team follow up on recent wins as they continue to focus on new sales. Your customers will appreciate that you still prioritize your relationship with them after they paid you.
- Ask your new customers which competitors they turned down for you and why. Knowing if they chose you for your product design, quality, customer service, awesome people, or another reason tells you where you excel and where you can improve.
- Get some shining testimonials for your marketing materials to help generate new leads.

SEE ALSO:

Learn Best Practices for B2C Businesses

About Flows

Standardize Email with Email Templates

Maintain a Healthy Sales Team

Your team succeeds when you invest in fostering a positive, happy work environment where everyone can succeed together. See our best tips for maintaining a healthy sales team that's mutually supportive and excited to make sales.

Give Your Team the Tools They Need to Sell Better

Set up your team for success. Help them find the tools they need, when they need them. Enable them to show up confidently, find resources, and access metrics that help them improve.

Our recommendations:

- Make sure that your team deeply understands your products so they can answer questions. Does your team have the product knowledge and know-how to sell with conviction and passion?
- Train your team to be proactive to explain how your products can relieve pain points that customers may not be aware of.
- Encourage your team to focus on making deeper connections before they grow their client lists, crunch numbers, and worry about details like call times. Help them understand and leverage relationships between the company and its top-tier customers.
- Provide mobile tools that let your team be productive on the go.
- Prepare your team to give dynamic presentations and pitch to prospects anytime, anywhere.
- Qualify new leads so that you direct the best ones to your team. Better leads can close faster.

Leverage Tribal Knowledge

Each teammate brings unique perspectives and experiences to your company. Encourage your team to learn from each other to support learning and growth

Our recommendations:

- Foster team camaraderie and support. A little healthy competition now and then can be a great motivator, but too much competition can be counterproductive.
- Pair every new hire with an experienced mentor to help them learn the ropes.
- Capture your team's best tips and knowledge in a centralized place where everyone can learn from each other.

Nail Your Onboarding Process

Effective onboarding sets up your new hires for success. And it's an opportunity to work out kinks in your sales process and build team loyalty from day one.

Our recommendations:

- Get feedback from your team to optimize your onboarding process. Streamline your process to help make incoming teammates productive as soon as possible.
- Consolidate best practices for onboarding and selling. Your new hires will appreciate that they can find everything they need to get started.
- Use onboarding to help build loyalty and retention.

Support Them When They're Down

There will be times when your team doesn't hit its targets. A healthy team shows compassion and support when times are tough.

Our recommendations:

- Reach out to team members who struggle more than others. Are there work or personal reasons or extenuating circumstances for performance decline?
- Keep an eye on factors outside your team's control, such as product and service issues or competitive threats. An outside perspective can help lift morale when your team is feeling down.
- Update or improve sales training and management reviews during low points. The extra attention can help support sales.
- Stay up-to-date on industry news to help your team innovate their sales techniques. A good start is *Quotable* by Salesforce.

SEE ALSO:

Trailhead: Sales Team Enablement

Quotable by Salesforce

5 Sales Secrets from Top Sales Execs at Salesforce

Closing deals is crucial to growing your business. If you don't have tons of experience convincing customers to sign on the dotted line, don't worry. Here are some proven techniques from our top sellers at Salesforce.

Before our sales leaders take to the phones or send out an email,

Do your homework

Before you reach out, have all the important details in hand and a list of questions to ask. Here are the questions our experts make sure to cover in that first call or email:

- Who are the decision makers?
- What is the budget?
- Has the prospect used something like your product or service before?
- What's the timeline?

Make sure they're ready to have a purchasing conversation

Sometimes customers are interested in learning more about your product, but aren't ready to make a decision. Ask them upfront where they're at in the decision making process so you know just how much effort to spend on trying to close the deal.

Be up-front

When you're talk to a prospect or a customer about costs, your offerings, or what to expect, make sure to provide accurate information. Help them make well-informed decisions about your product and build trust that you will deliver what you say you can.

Look for signals

Do they respond to your emails? Pick up your phone calls? Are they enthusiastic? Sometimes the simplest indications of readiness are a sign for you to follow up, send a proposal, or move on to a more qualified lead.

Always bring it back to the customer

At every opportunity, bring the conversation back to the customer. Use their industry as an example in your demo, shape meetings around what works best for their schedule and timeline, and find ways to solve their pain points in your pitch. It shows that your product or service would provide value to the customer—the ultimate clincher in closing a deal.

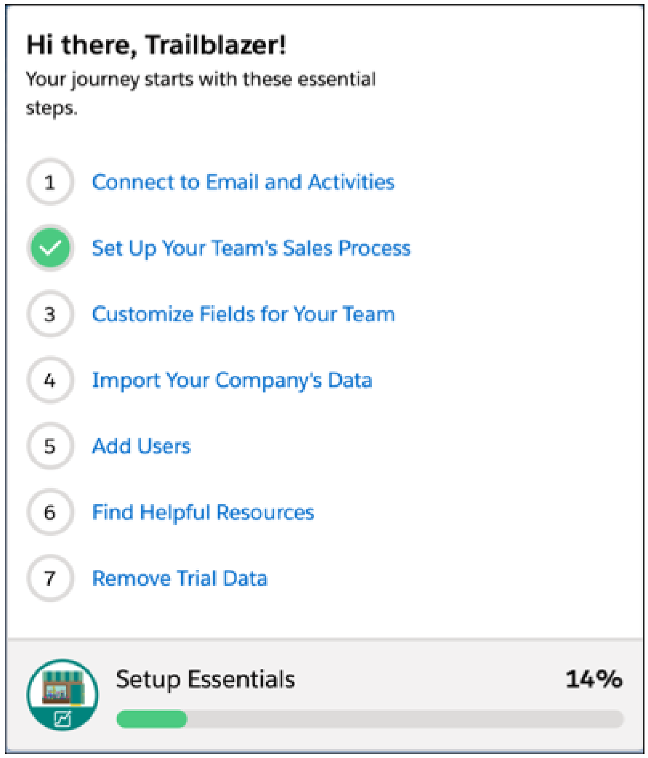
Use the tips from our top sales people to help you focus on what's important to the customer, show the value of your product, and move decision makers through your pipeline. Pick up on subtle clues throughout the prospecting process so you can track your progress and decide if the deal is worth pursuing. Spend time on deals that are likely to convert to save time and keep your business growing.

Sync Emails and Activities

Automatically bring your business emails and events into Salesforce with Einstein Activity Capture. Then your deals, cases, and contacts will show any related emails and events.

How Do I Set It Up?

From the home page, select **Connect to Email and Activities**.



Then follow the steps in the guided setup. Once you've successfully set it up, a confirmation banner appears at the top of your screen.

Note: If you use Email-to-Case to create support cases from your emails, make sure to use a different email address for Einstein Activity Capture. What's Email-to-Case?

What Should I Do If It Doesn't Connect?

If your emails and activities aren't syncing after you complete the setup flow, try enabling Einstein from Setup. Here's how to do just that.

1. Go to Setup and enter **Permission Sets** in the Quick Find box.
2. Select **Inbox With Einstein Activity Capture** and click **Manage Assignments**.
3. Check the box next to your name and click **Remove Assignments.**
4. Click **Okay** in the pop up and then click **Done**.
5. Check the box next to your name and click **Remove Assignments**.
6. Click **Done**.
7. Go to your profile by clicking on either your profile image or the placeholder image in the top right of your screen.
8. Click **Settings**in the drop down.
9. In the Quick Find box, enter **Einstein Activity Capture**.
10. Click **Settings**.
11. If an email address appears, click **Disconnect** then **Reconnect**. If no email address appears, click **New Account**and follow the prompts.

How Can I Check If My Email Is Connected?

If you'd like to see what email accounts are connected, there's an easy way to do just that.

1. Go to your profile by clicking your profile image or the placeholder image in the top right of your screen.
2. Click **Settings** in the dropdown.
3. Type **Einstein Activity Capture** in the Quick Find box.
4. Click **Settings**.
5. Dismiss the modal to see a list of your connected accounts.

SEE ALSO:

Set Up Einstein Activity Capture

Use Einstein Activity Capture

Offer Customer Support in Essentials

Salesforce Essentials makes offering customer support easy. Track and solve your customers' issues with cases, so nothing slips through the cracks. Keep your customers happy with self-service, live web chat and messaging, and phone support.

With your Salesforce Essentials subscription, you can offer stellar customer service with no additional cost. When you want to offer more ways for your customers to reach you, you can add more features for an extra cost from the Manage Subscription page in Setup.

Note: The support features that require an extra cost are Sales Dialer, Dialer for Essentials, Web Chat for Essentials (for more than one user), and Facebook Messenger for Essentials (for more than one user).

What You Can Do	What To Get
Track and solve customer issues without breaking your team's current workflow.	Cases
Get cases created for you from incoming support emails.	Email-to-Case
Let customers fill out a form on your website that logs a case for your team.	Web-to-Case
Get cases created for you from posts and messages to your business Facebook, Twitter, Instagram, and YouTube pages.	Social Customer Service
Write articles that cover FAQs, troubleshooting steps, and other information that your customers contact you about.	Knowledge
Create a branded self-service site where your customers can read helpful articles and contact your team. You can also offer web chat here.	Help Center
Create a phone number inside Salesforce to easily call leads and customers, log calls, and more. Or, integrate a third-party phone product so it works in Salesforce.	Phone
Chat with customers who are browsing your website or help center.	Web Chat for Essentials

What You Can Do	What To Get
Use Facebook Messenger to interact with customers inside Salesforce.	Facebook Messenger for Essentials
Route cases, chats, messages, and leads to someone on your team automatically.	Omni-Channel

Let Your Customers Help Themselves

Give your customers the gift of self-service. When your customers can answer their own questions, your team can spend more time making deals and solving bigger customer issues. Write and organize articles with Knowledge that provide information about your business and answer common questions. Serve up your categorized articles in a help center so your customers can find exactly what they need. If they have a question that requires human intervention, they can log a case to your team. (Or if you're feeling spiffy, you can offer live chat, too).

Write Useful Help Articles for Your Customers and Your Team

Use Knowledge to write and share articles, so your team can leverage your communal knowledge to help customers faster. You can also surface your Knowledge base in your help center to let customers find answers on their own.

Create a Self-Service Website

Help Center lets you share Knowledge articles that answer common questions, so your customers can help themselves. You can also provide Chat or a contact button so that customers can reach out to your team for the issues that require human intervention.

Write Useful Help Articles for Your Customers and Your Team

Use Knowledge to write and share articles, so your team can leverage your communal knowledge to help customers faster. You can also surface your Knowledge base in your help center to let customers find answers on their own.

Why Do We Use It?

Knowledge helps your team answer customers' questions with articles. You can also let customers can find answers to their questions on their own in your help center.

Why Is It Important?

Knowledge helps improve the productivity and speed of your team, so they can get customers the answers they need faster. It also lets you offer self-service to your customers by making your articles public in a help center, so customers can find answers on their own.

SEE ALSO:

Set Up Knowledge with a Guided Setup Flow

Create and Edit Articles

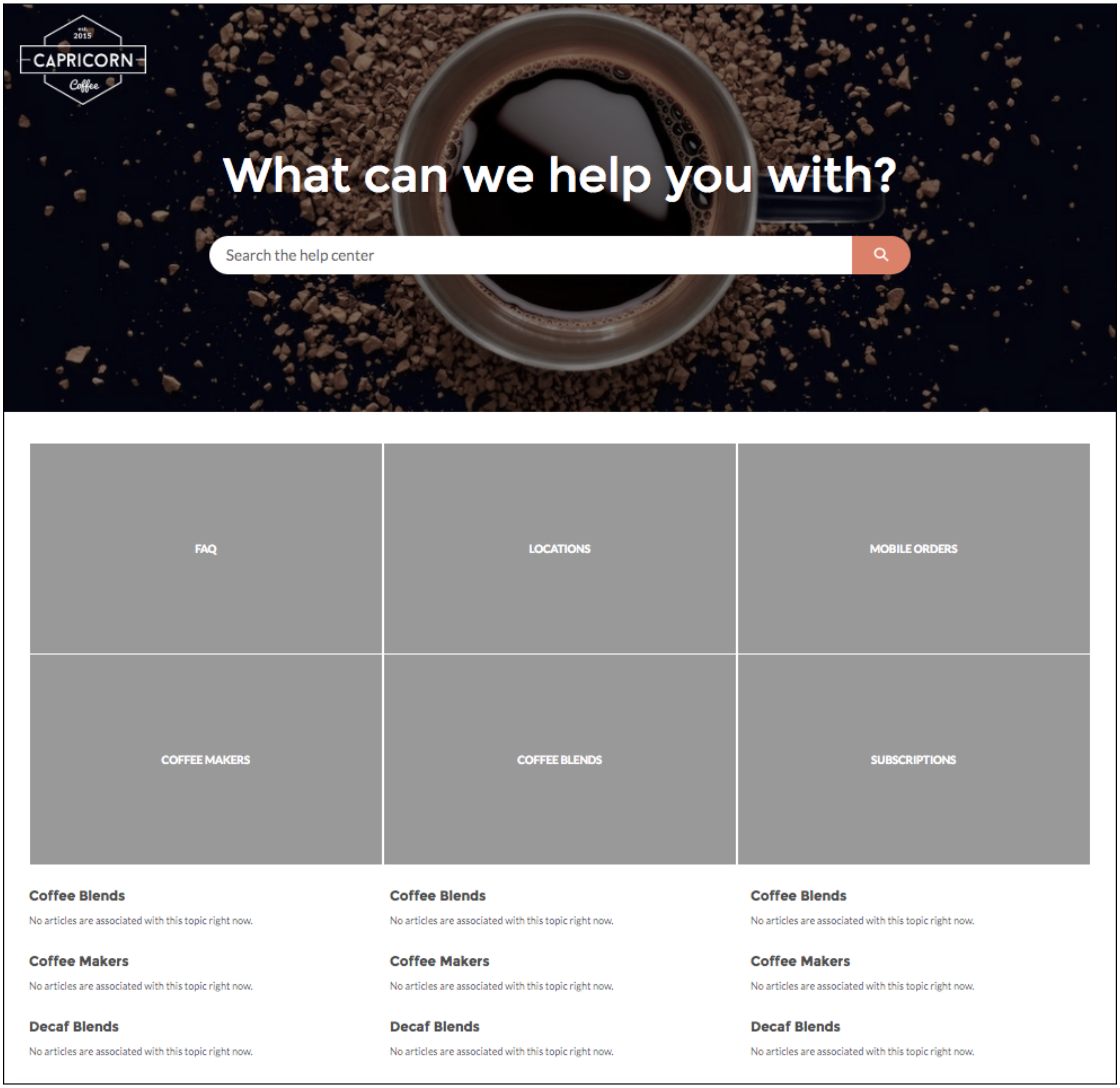
Use Your Knowledge Base

Create a Self-Service Website

Help Center lets you share Knowledge articles that answer common questions, so your customers can help themselves. You can also provide Chat or a contact button so that customers can reach out to your team for the issues that require human intervention.

Why Do We Use It?

Help Center offers a centralized place for your customers to help themselves with any questions they have about your business.



Why Is It Important?

Help Center is a quick and easy way for your customers to get the answers they need without waiting to get in touch with someone on your team. Your team saves time by letting customers answer common issues with articles, so they can focus on closing the tricky cases that your articles can't solve.

Prepare for Your Help Center

Get ready to create your branded, self-service help center. Plan or write your articles and their categories, decide which topics you want to feature, and gather your branding materials.

Build an Effective Self-Service Help Center

Customer-friendly support doesn't have to be complicated or burdensome for your team. Offer a self-service help center as an effective and cost-efficient way to grow your business. Follow these tips to get the most value out of self-service.

SEE ALSO:

Prepare for Your Help Center

Set Up Help Center with a Guided Setup Flow

Prepare for Your Help Center

Get ready to create your branded, self-service help center. Plan or write your articles and their categories, decide which topics you want to feature, and gather your branding materials.

A help center enables your customers to help themselves when they have questions or run into a common issue with your product or service. Before you dive in, let's make sure that you have everything you need to get your help center up and running smoothly.

EDITIONS

Essentials is available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Plan Your Articles

Know what kinds of articles you want to publish and share with your customers before you start. If you can write some of all of your articles ahead of time, that's even better—you can get a more accurate preview of your help center if you have some content to display.

How Articles Work

Articles are written and published using Salesforce Knowledge (you can publish up to 500 articles with your Salesforce Essentials subscription). You can make anyone on your team a Knowledge user so they can create and publish drafts, edit articles, and delete articles.

You can have public articles and internal-only articles. We recommend planning for both, because an internal Knowledge base can help your team align and share information. For your help center, you'll include public articles, so your customers can access your awesome content.

Categorizing Your Articles

When you write articles, you can organize them into categories (called data categories) and groups of categories (called data category groups). These tools help you sort your articles so your customers can do less searching.

You can create categories and groups for different regions, products, types of articles (like FAQs versus troubleshooting steps), or whatever works best for you. For example, you could create a data category group called US Regions, which includes the data categories West, Midwest, South, and Northeast. So when you write an article that lists the locations and hours of your stores on the west coast, you would select the West category. Then, a customer in Nevada can look in the West category to find the nearest location faster.

You can create categories for your articles before or during the Help Center guided setup flow. Either way, we recommend planning out the categories you want ahead of time so you can set up everything faster.

Share and Manage Featured Topics

Your help center has tiles on the homepage that let your customers read articles within a particular category. We call these featured topics. You can set your featured topics when you use the Help Center setup flow.

Creating New Topics During the Setup Flow

If you don't create your data categories before starting the flow, you can create topics. We do some heavy lifting behind-the-scenes to create data categories for them. When you're ready to publish articles, simply assign them to the data categories we created, and they'll appear in your help center.

Selecting Data Categories During the Setup Flow

When you've already created data categories and data category groups before starting the flow, you can select the ones you want to appear as featured topics. We create topics from those data categories to make them show up in your help center's homepage tiles. Any articles that you publish (or have published) using those data categories appear in your help center.

Managing Your Topics

You can edit your featured topics in Experience Workspaces in Setup. From there, go to **Content Management** > **Topics** > **Featured Topics**.

Add Branding to Your Help Center

You can add a logo, login page background, page header, and featured topic tile images. You can also choose colors for different elements on your help center.

To select colors and add a logo, login page background, and page header, use Experience Builder. See Brand Your Community for more details.

To add featured topic images, use Experience Workspaces. From there, go to **Content Management** > **Topics** > **Featured Topics**.

SEE ALSO:

Set Up Help Center with a Guided Setup Flow

Help Center Setup Flow Next Steps

Introduction to Help Center

Use Experience Builder

Manage Your Featured Topics

Build an Effective Self-Service Help Center

Customer-friendly support doesn't have to be complicated or burdensome for your team. Offer a self-service help center as an effective and cost-efficient way to grow your business. Follow these tips to get the most value out of self-service.

When you build a customer-friendly self-service help center, you set up your customers and team members for success. Your customers are happy to get the answers they're looking for. Your team is happy to focus on trickier issues, making sales, and checking off other to-dos.

Make Sure That Customers Can Find Your Content

Your self-service site isn't useful if your customers don't know where to go for help, so make it easy for customers to find.

- Include a link to your help center on your website's most highly trafficked pages. Consider including links in other places, too, like in email communications, member pages, and product pages.
- Help customers find answers by adding a search bar on your help center.
- Use labels, categories, or tags to guide customers to the right place.

- Consider optimizing your content for search engines, as your customers could turn to a web search before they find your resources. Include keywords that your customers might search for in your titles and content.

Write Clear, Relevant Articles

Helpful articles are clearly written, informative, and useful. Use simple and clear language to describe what customers need to know. Cut details that don't help them succeed.

For a relevant and useful help center, gather your customers' most common questions and turn them into articles. We recommend that you start with a variety of content such as common support requests, troubleshooting steps, FAQs, and detailed product information. You can include images and videos for a more hands-on approach that your customers will love.

You don't have to start from scratch—look to your team's past interactions with customers. You or someone on your team likely answered basic questions about your company, helped a customer fix an issue, or wrote out a step-by-step tutorial for your products. Start with what you have to be able to quickly write and publish your initial set of articles. You can make adjustments later.

Open the Lines for Feedback

Listen to feedback to build trust with your customers. Start by anticipating what your customers want and offer a few articles to them. But if you let your them provide feedback, you can gather useful data that takes the guesswork out of your customer support.

Our recommendations:

- Offer readers the opportunity to vote on or rate articles to show you if they think the information is useful.
- Include a contact form in your help center so customers can reach out if they can't find the answer to a question.
- Offer more support such as email, phone, live chat, or messaging apps, and show those links prominently on the page.

Include Article Maintenance in Your Team's Processes

Your help center isn't a one-time task. Your team should always listen to customer feedback and find new questions and solutions to document. We recommend hosting regular reviews to go over feedback data and re-read articles to make sure that you're truly helping your customers.

Add Branding for a Seamless Experience

Give your customers a consistent experience between your help center and your corporate site. Use the same colors, icons, header, and footer across all your web properties, and use the same domain or subdomain.

Branding doesn't stop at visuals. Create a style guide for your team to keep your articles consistent in voice, tone, and formatting regardless of who writes them. Look for similar examples online to consolidate and adapt as you write your first articles.

Keep Mobile in Mind

Smartphone users increasingly turn to their phones instead of a desktop when they want answers. Your help center should be responsive and reformat to fit on the viewer's screen. If you omit mobile, you lose opportunities to help and maintain customer relationships.

A self-service help center is the first place your customers go for help, so make it relevant and easy-to-use. When you nail self-service, your customers are happy to avoid a lengthy phone call or a game of email ping-pong. Your team is freed up to focus on complicated support issues, sales, and everything else they need to get done.

SEE ALSO:

Salesforce Blog: 4 Steps to Write Amazing Support Content for Your Small Business Help Center

Turn Emails and Social Media Posts into Cases

Use Email-to-Case to turn incoming emails to your support email address into cases in Salesforce. Social Customer Service automatically creates cases for social media mentions, posts, or direct messages from your company’s Facebook, Twitter, YouTube, and Instagram pages. Set up Email-to-Case, Twitter, and Facebook with guided setup flows.

Why Do We Use It?

Your customers are reaching out to you across multiple channels, like email, Facebook, and Twitter. Instead of sending someone from your team to camp out on each channel to wait for messages, you can turn your customers’ interactions into cases in Salesforce. Then you can prioritize and assign them all together.

Note: Salesforce Essentials comes with the Social Customer Service Starter Pack, which means that you can select any 2 engagement channels out of the box.

When you’re working on cases from your support email address, you can insert email templates, add attachments, and send your response right from the case. No more hopping between your email and your case list.

With social cases, the following interactions become cases for your team:

- Facebook: Posts to your company’s Facebook page. If you want to use Facebook Messenger in Salesforce, see Chat and Messaging for Essentials on page 63.
- Twitter: At-mentions and direct messages to your company’s Twitter account
- YouTube: Comments on videos in your company’s channel
- Instagram: Comments and replies on your company's posts

You can like, unlike, view source, and delete social media posts from the case feed.

Want to see it in action? Our 1-mnute feature tour will show you how it all works. Watch the tour: Create Cases from Emails and Social Media Posts (1 minute)

Note: Emails larger than 32 KB are truncated when they come in as cases, so you’ll have to check your inbox to see those messages in full. And if you use Einstein Activity Capture to sync your emails and calendar, make sure to use a different email address for Email-to-Case. What's Einstein Activity Capture?

Why Is It Important?

Save time and let your email and social media interactions come to your team where they already are: in Salesforce. Gathering your customers’ questions in one place lets you and your team manage your open tasks more efficiently and make sure that every customer is heard.

SEE ALSO:

Set Up Email-to-Case with a Guided Setup Flow
Set Up Facebook or Twitter with Guided Setup Flows
Set Up Social Customer Service

Respond to Social Media Interactions in Salesforce Essentials

Join customer conversations on social media without monitoring your accounts in separate tabs. Connect with Twitter, Facebook, Instagram, and YouTube to respond to posts and direct messages in Salesforce. You can also create cases from social posts, so your team can provide customer service everywhere your customers are.

You can connect your Twitter, Facebook, Instagram, and YouTube accounts to Salesforce. Salesforce Essentials comes with the Social Customer Service Starter Pack, which means that you can select any 2 engagement channels out of the box.

Twitter

See your company's at-mentions, replies, and direct messages. You can reply, retweet, favorite, and follow from Salesforce, or click tweets to view and respond to them on Twitter. Use the guided setup flow to get cases created for you when your company account receives at-mentions and direct messages.

Facebook

See your Facebook timeline in Salesforce. You can reply to and like posts from Salesforce, or click posts to view and respond to them on Facebook. Use the guided setup flow to get cases created for you when customers post on your business page.

> Note: Make sure that you have a business page associated with your Facebook account.

Instagram

See comments and replies on your company's Instagram photos in Salesforce. You can send replies in Salesforce.

> Note: Make sure that your Instagram account is a business account, and that it's linked to a Facebook account. It also needs to be linked to a business page on that Facebook account.

YouTube

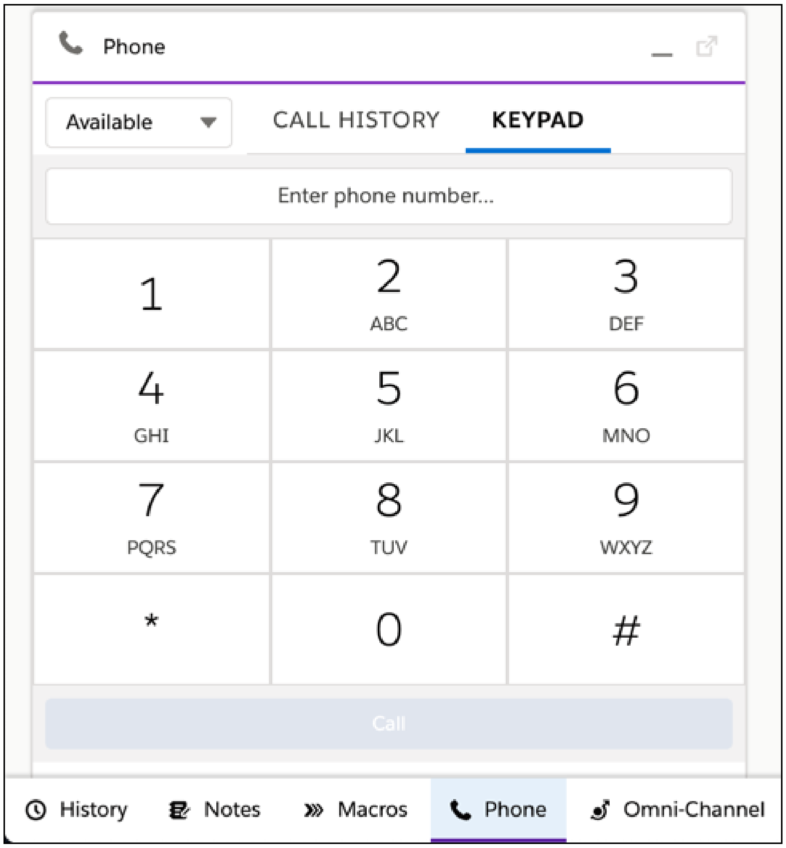
See comments on your company's videos in Salesforce. You can reply in Salesforce, or click comments to view and respond to them on YouTube.

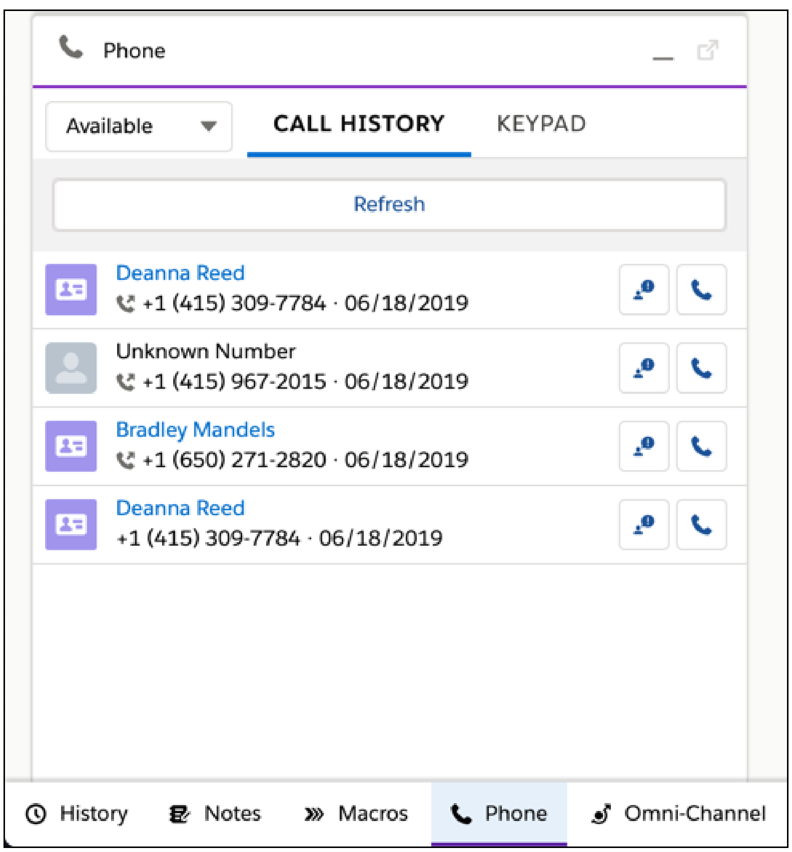
Use a Phone in Salesforce

A phone lets your team take and make calls alongside their other work in Salesforce. You can create a phone with Salesforce using Sales Dialer or Dialer for Essentials, or you can integrate a third-party phone product.

Why Do We Use It?

Adding a phone to Salesforce saves you money because you don't have to purchase phones and individual phone lines for your team. Depending on the phone option you choose, you can automate your tasks, customize your greetings and wait music, and use contact requests to let customers request a call back later.


Phone
Available
CALL HISTORY
KEYPAD
Enter phone number...
1
2 ABC
3 DEF
4 GHI
5 JKL
6 MNO
7 PQRS
8 TUV
9 WXYZ
*
0
#
Call
History
Notes
Macros
Phone
Omni-Channel


Phone
Available
CALL HISTORY
KEYPAD
Refresh
Deanna Reed
+1 (415) 309-7784 · 06/18/2019
Unknown Number
+1 (415) 967-2015 · 06/18/2019
Bradley Mandels
+1 (650) 271-2820 · 06/18/2019
Deanna Reed
+1 (415) 309-7784 · 06/18/2019
History
Notes
Macros
Phone
Omni-Channel

Why Is It Important?

Bringing a phone into Salesforce gives you everything you need in one place. You can talk to customers and log your conversations so that everyone on your team stays up-to-date with what you've discussed. You can pull up related records like an account or case during a call to get the context you need to close a deal or answer the customer's questions.

Phone Options in Salesforce Essentials

Use Salesforce to make and log calls with Sales Dialer or Dialer for Essentials. Or, connect a third-party phone product to Salesforce using Open CTI. All of our phone options let you make and receive calls in Salesforce and log calls to related account and contact records.

Create a Company Phone for Your Team

Create a single phone number that connects your customers to your team. Your team can take and make calls from Salesforce. Personalize conversations based on past call history, take notes, and finalize a deal or case details all within Salesforce. Align your customers' phone experience with your company by uploading your own recorded messages and wait music.

Phone Options in Salesforce Essentials

Use Salesforce to make and log calls with Sales Dialer or Dialer for Essentials. Or, connect a third-party phone product to Salesforce using Open CTI. All of our phone options let you make and receive calls in Salesforce and log calls to related account and contact records.

Dialer for Essentials

Dialer gives you one phone number that your entire team can use to take and make calls in Salesforce. Personalize conversations based on past call history, take notes, and finalize a deal or case details all within Salesforce. Use contact requests to let your customers request a callback when they don't want to wait, so your team can get back to them later. Upload your own recorded messages and wait music to align your customers' phone experience with your company.

Sales Dialer

Sales Dialer brings you the same calling, call history, and call logging that Dialer for Essentials offers. It also boasts more functionality like multiple phone numbers, personal voicemail, pre-recorded messages for customers, local presence, call bridging to a physical phone, call recording, and more. However, you can't use contact requests, and call monitoring is not supported.

Use a Third-Party Phone Product

Connect your third-party phone implementation to Salesforce so you can take your phone calls in Salesforce with your other work. We provide a guided setup flow that lets you get set up in only a few minutes if you use one of our partners: Supported for Amazon Connect, b+s Connects for Cisco, Five9, and NewVoiceMedia. If you use a different product, we may have a package that you can use in the AppExchange to set it up manually.

Note: Sales Dialer and Dialer for Essentials can't be used together. You can use either one alongside a third-party phone product, but your team members can't be added to both phones.

SEE ALSO:

Dialer for Essentials

Sales Dialer

Set Up Your Third-Party Phone in Salesforce

Create a Company Phone for Your Team

Create a single phone number that connects your customers to your team. Your team can take and make calls from Salesforce. Personalize conversations based on past call history, take notes, and finalize a deal or case details all within Salesforce. Align your customers' phone experience with your company by uploading your own recorded messages and wait music.

Dialer for Essentials consolidates your company's phone calls to one phone number, so incoming calls have a better chance of connecting to someone on your team. Your team takes the calls from either the Sales app or Service console app, where they can view and update related records like contacts or leads, see call history, take notes, and log calls.

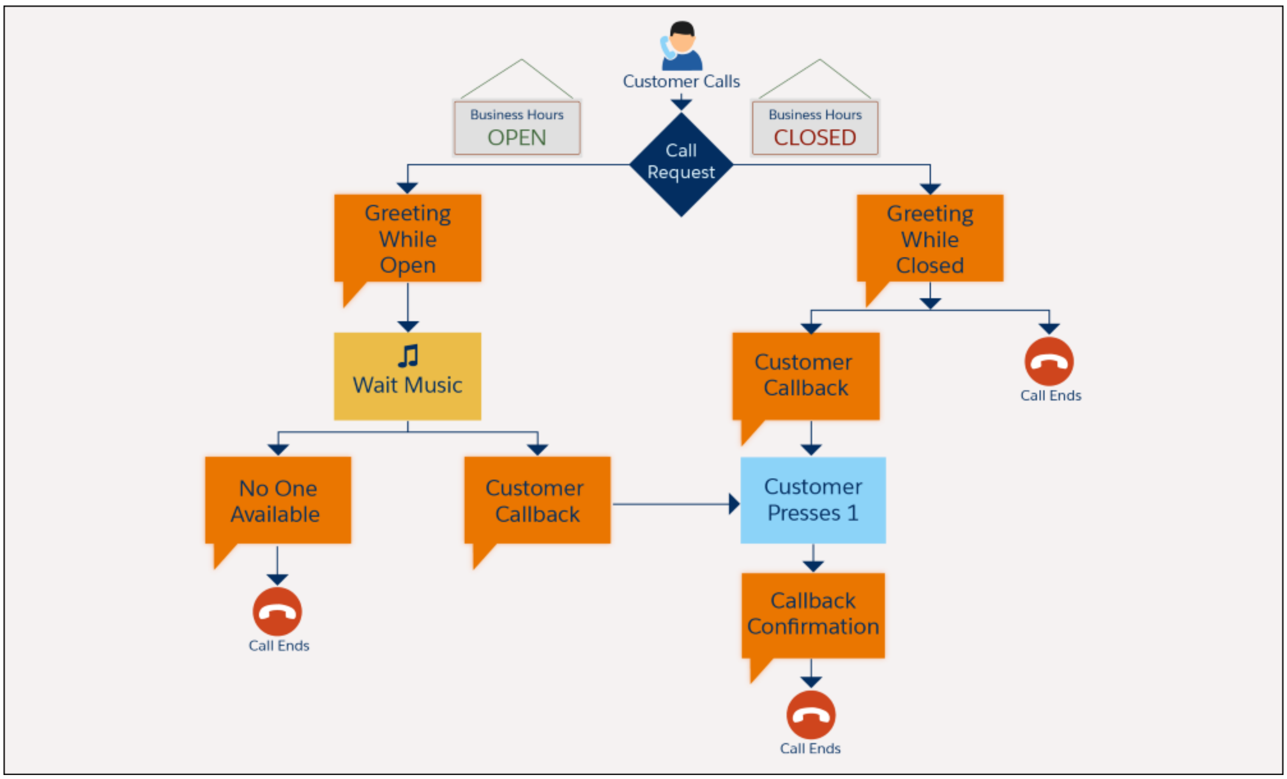
EDITIONS

Essentials is available in: Lightning Experience

Available in: **Essentials** Edition

Note: Dialer for Essentials is for use only by customers in the US and Canada, and is intended to be used to dial US and Canadian numbers only.

When you're open and available, the customer hears your Greeting While Open message and Wait Music. When you're closed, they hear the Greeting While Closed message.



If your team doesn't pick up the call, the customer hears either the No One Available message or the Customer Callback message depending on your settings. If the customer requests a callback, they hear the Callback Confirmation message.

Want to see it in action? Our 1-mnute feature tour will show you how it all works. Watch the tour: Use a Phone in Salesforce with Dialer for Essentials (1 minute)

Get the Most from Tasks

Tasks are to-do list items that help you keep track of your workload and meet important business objectives. If you're an individual contributor, you can use task reminders to stay on top of upcoming deadlines. If you're a manager, you can use tasks to align business processes and monitor productivity.

Optimize Tasks as an Individual Contributor

Use tasks to set deadline reminders, manage records, and organize your work week.

The task reminder field is where the magic happens. You can elect to receive notifications as a task's deadline approaches or when the task is overdue, which helps you prioritize work. Create a task reminder to customize a slide deck two days before delivering a pitch. Or give yourself a heads-up two hours before you promised to update a customer on their support case. Reminders ensure that deadlines never slip through the cracks.

Tasks can be one-time or recurring. A recurring task can come in handy for a monthly account outreach or a daily reminder to follow up on a high-risk support case.

As an individual contributor, you lean on tasks for two reasons:

- Manage standalone to-do list items: Set a weekly to-do list item to review a pipeline. Add a reminder to check case updates.
- Manage specific records: Set a task to take action on a lead, contact, campaign, or contract.

You have four options to manage tasks:

- List Views: Want to know today's priorities? Check Tasks Due Today and Overdue Tasks in the Tasks object when you start your shift.
- Split View in the Service Console: Want to see task details from the list view? Open your list of Tasks Due Today or Overdue Tasks in split view, and then open individual tasks without losing sight of the full list.
- Kanban board or sprint wall: Need to know the status of your to-do list items or those of your whole team? Use your kanban board or sprint wall to monitor tasks that are new, in progress, on hold, or completed.
- Mobile App: Travel for work? Stay organized by viewing and managing tasks on your mobile phone.

SEE ALSO:

Start Using Tasks

Optimize Tasks as a Manager

As a manager, you can use tasks to align business processes and monitor productivity.

Keep your team organized with group tasks. You can create one to-do list item, and then assign it to multiple individual users or a predefined group. For example, help ensure that all employees take HR compliance training or send a promotion to their managed accounts. Group tasks can be recurring, such as for a monthly team meeting or a quarterly revenue review. Assigning the same task to everyone keeps the team aligned and efficient.

You can check team productivity in two ways.

- Create an All Open Tasks or All Overdue Tasks report see a birds-eye view of employee productivity. Show these reports to your team to indicate how they're doing with task management. You can stay on top of this report data week over week with email notifications.
- Want to dive into individual tasks and leave comments to a user? List views bring report data to life with the ability to access each to-do list item and then follow up.

Build an "All Open Tasks" Report

Create an `All Open Tasks` report to see how many open tasks your team must complete by a certain date, week, or month. You can compare these numbers weeks over week to see improvements or declines in productivity.

Build an "All Overdue Tasks" Report

Create an `All Overdue Tasks` report to see the volume of past due tasks. You can compare these numbers week over week to see improvements or declines in productivity.

SEE ALSO:

Start Using Tasks

Build an "All Open Tasks" Report

Create an `All Open Tasks` report to see how many open tasks your team must complete by a certain date, week, or month. You can compare these numbers weeks over week to see improvements or declines in productivity.

1. Navigate to the **Reports** tab.
2. Click **New Report**.
3. Select **Tasks & Event** for the report type.
4. Click **Filters**.
5. Apply the following filters:
   a. Change the Show Me filter to All Activities to see all the activities created.
   b. Change the Date filter to **All Time**. If you want to filter your report to see tasks based on a certain due date, change the Date filter. For example, switch to **This Week** to only see tasks that are due for the week.
   c. Change the Show filter to **Tasks** to see only open tasks.
6. Save your changes.
7. Give your report a name and choose whether to make it public or private.
   a. If you select **Private Reports**, only you can see the report. If you select **Public Reports**, then everyone with access to reports in Salesforce can see the report.
8. Save your changes.

You can subscribe to a report to receive it by email.

SEE ALSO:

Schedule and Subscribe to Reports

Build an "All Overdue Tasks" Report

Create an `All Overdue Tasks` report to see the volume of past due tasks. You can compare these numbers week over week to see improvements or declines in productivity.

1. Navigate to the **Reports** tab.
2. Click **New Report**.
3. Select **Tasks & Event**for the report type.
4. Click **Filters**.
5. Apply these filters:
   a. Change the Show Me filter to **All Activities** to see all the activities created.
   b. Change the Date filter to **Last 30 Days** to see the open tasks that were due within the last 30 days. You can filter the report to see tasks that were due yesterday, today, or within the last 30, 60, 90, 120 days.
   c. Change the Show filter to **Tasks** to see only the open tasks.
6. Save your changes.
7. Give your report a name and choose whether to make it public or private.
   If you select **Private Reports**, only you can see the report. If you select **Public Reports**, everyone with access to reports in Salesforce can see the report.
8. Save your changes.

You can subscribe to a report to receive it by email.

SEE ALSO:

Schedule and Subscribe to Reports

Going Beyond the Basics

Give your team more automation and productivity by routing incoming work (like cases) to the best-fit person for the job. Use Chat and Messaging to provide instant conversation to your customers through web chat and Facebook Messenger. Use Macros to complete multi-step tasks with a single click.

Divvy Up Work On Your Team with Routing

Use Omni-Channel to route work items (like cases, leads, chats, and messages) to the best-fit person on your team based on your team's availability and the priority of the work. The most important work items are pushed to your team first.

Offer Live Customer Support with Chat and Messaging

Offer your customers instant conversation with web chat and Facebook Messenger for Essentials. Chats and messages are delivered to team members alongside their other work in Salesforce, so they can handle cases, chats, messages, and everything else side by side.

Automate Your Tasks with Macros

A macro automates a common process so your team can help customers with fewer clicks.

Learn Best Practices for B2C Businesses

If you're running a small business that works with customers directly, you've definitely got a lot going on. Whether it's stocking shelves or responding to questions, managing your business is an all-consuming task. With Essentials, you can bring email, tasks, and all your other to-dos right into Salesforce. Here are our top recommendations for getting the most out of Essentials.

Add Your Apps to Salesforce Essentials

Want to extend the functionality of your Salesforce platform? Not sure where to start? While Salesforce Essentials doesn't come with API access, our support coaches have gathered what they believe are the *most essential* apps to extend functionality. Check out our **AppExchange** to integrate some of the tools you already use and love with Salesforce.

Re-engage Inactive Leads and Customers

If a lead or customer hasn't purchased or accessed your product in about 30 days, consider them inactive. This behavior doesn't mean they're no longer interested; it's just time to remind them about your great products and service.

Manage Your Contacts with These Best Practices

Storing and managing contact data in your CRM means that you get to know your customer and understand the timeline of your relationship with the customer. You also get a big-picture view of how all your customers benefit your business.

Automate Your Business Routines

Save time by automating your business practices. Rules, Process Builder, and Flows turn your repetitive workload into automated actions that do work for you.

Best Practices for Marketing Teams

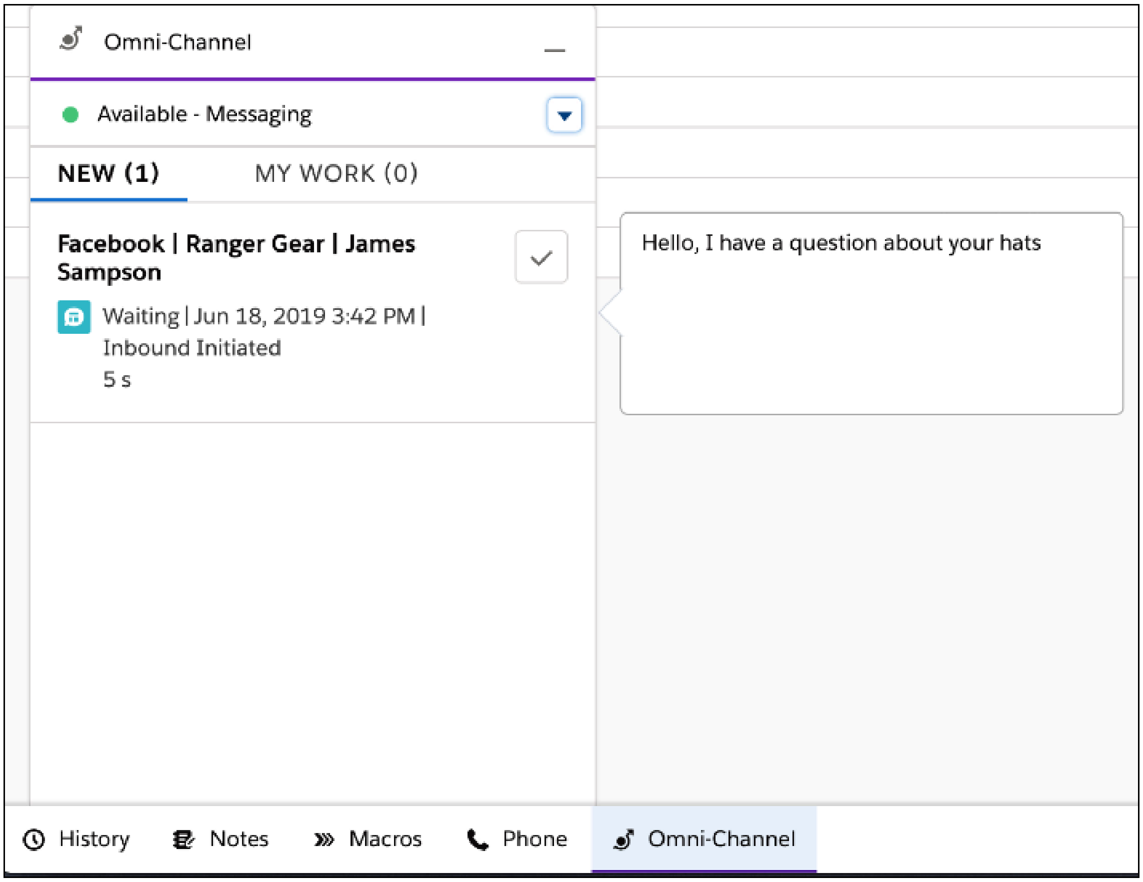
Marketing outreach is key to attracting new leads and retaining customers. Whether you want to send a promotion to a loyal customer or reach multiple new leads with an offer, we have tools to help.

Divvy Up Work On Your Team with Routing

Use Omni-Channel to route work items (like cases, leads, chats, and messages) to the best-fit person on your team based on your team's availability and the priority of the work. The most important work items are pushed to your team first.

Why Do We Use It?

Omni-Channel helps customers reach the right person on your team for their needs. Your team members don't have to search for the next issue to solve—it's pushed right to them in the Service Console.



Why Is It Important?

Omni-Channel pushes the highest-priority cases to your team. Your customers' most important needs are addressed first, letting you help them more efficiently.

SEE ALSO:

- Set Up Omni-Channel with a Guided Setup Flow
- How Does Routing Work?

Offer Live Customer Support with Chat and Messaging

Offer your customers instant conversation with web chat and Facebook Messenger for Essentials. Chats and messages are delivered to team members alongside their other work in Salesforce, so they can handle cases, chats, messages, and everything else side by side.

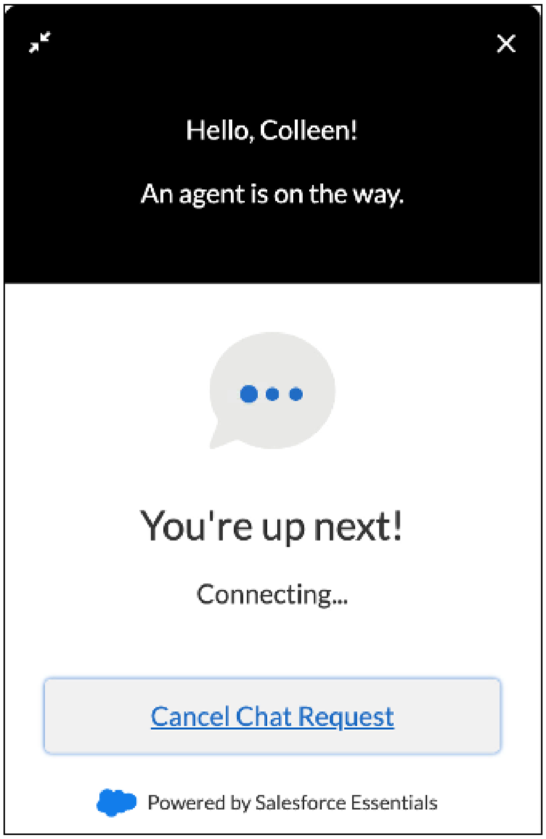
EDITIONS

Essentials is available in: Lightning Experience

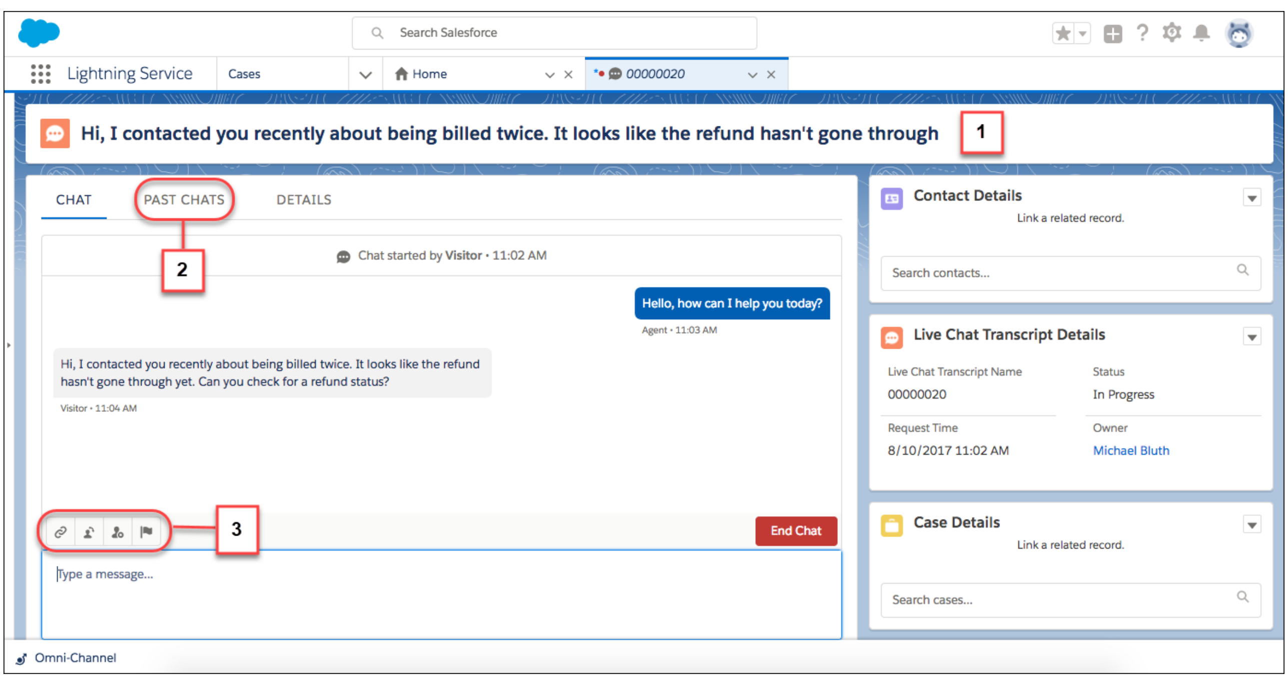
Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Web Chat

Embed web chat into your website or help center with the option to let customers log a case when your team's away. You can display the chat button for customers in your website and help center.



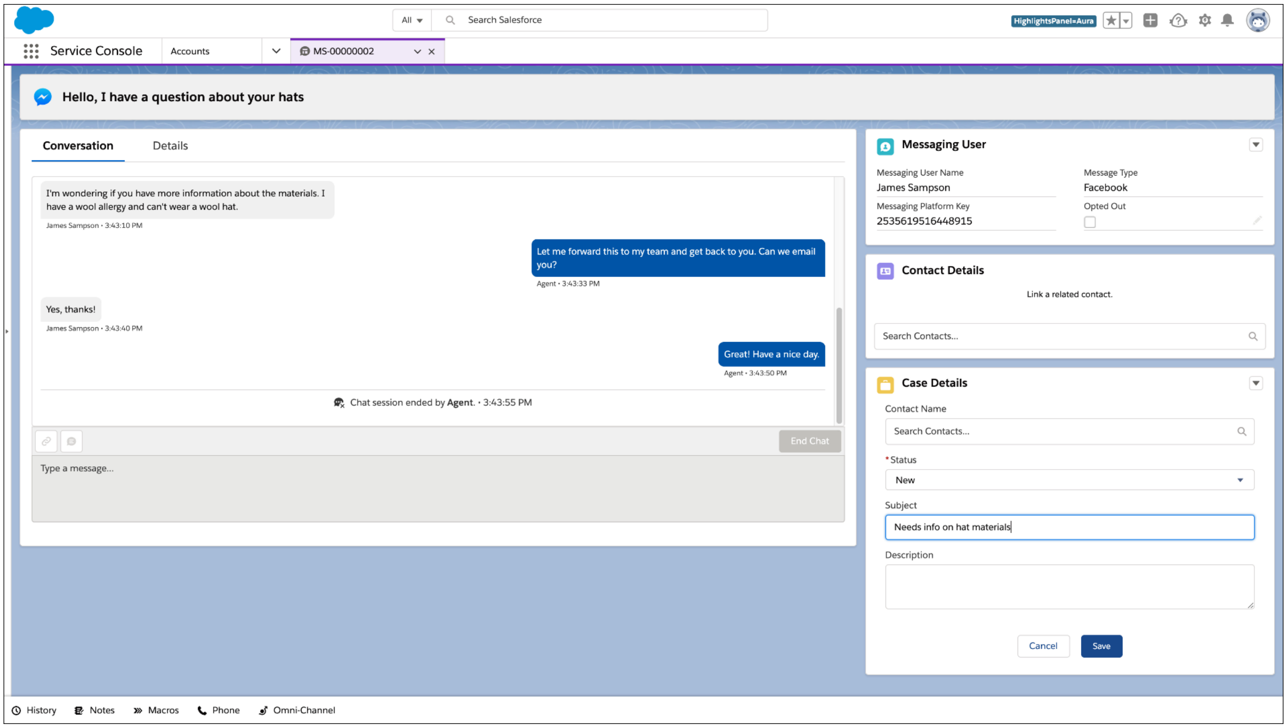
Your team can accept chats in the Service Console. The first 100 characters of the customer's message appear in the chat header, so you can easily differentiate between all your in-progress chats (1). The Past Chats tab lets you quickly refer to previous chats with the customer (2).The handy toolbar gives you what you need to provide speedy service (3).



Facebook Messenger for Essentials

Facebook Messenger for Essentials connects your business's Facebook page to Salesforce, so messages to your page don't go unseen. Make sure that you have a business page ready to go before setting up Messaging.

You can respond to messages in the same place as your chats: right in the Service console. Your chats, messages, cases, and everything else open in tabs so you can take on multiple conversations at a time. Easily create related records so you don't lose important information, and your customers always get what they need.



How to Get Started

Essentials comes with 1 license of Web Chat and 1 license of Facebook Messenger for Essentials, so you can start right away. When you're ready, you can purchase more licenses for your team from the **Manage Subscription** page.

Want to see it in action? Our 1-mnute feature tour will show you how it all works. Watch the tour: Talk to Customers in Real Time with Chat and Messaging (1 minute)

The Chat and Messaging setup pages are where you can dive in using simple guided setup flows. If you're adding your team, the users you select during each flow can immediately start receiving chat and message requests. All they have to do is use the App Launcher to switch to the Service Console app, open Omni-Channel from the utility bar, and change their status to **Available - Chat** or **Available - Messaging**.

To add web chat to your website, paste the provided code snippet into your website before the closing body tag (`</body>`) on the pages where you want the chat button to be displayed.

To add web chat to your help center, drag the Embedded Service Chat component into your help center using the Experience Builder. Then open the security settings in the Experience Builder and add your chat endpoint URL as a trusted site. The chat endpoint is in your embedded chat code snippet as the `baseLiveAgentContentURL`. (If you lost your code snippet, you can find it in **Setup** > **Embedded Service**.)

SEE ALSO:

- Set Up Chat
- Set Up Messaging
- Manage Trusted URLs

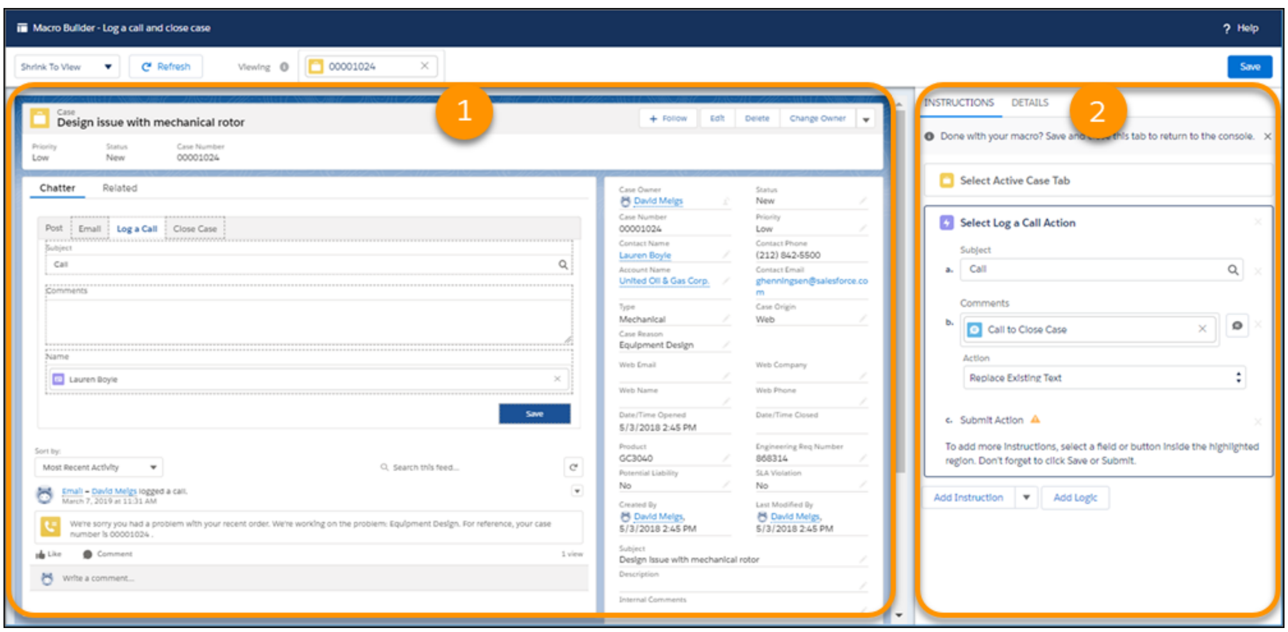
Automate Your Tasks with Macros

A macro automates a common process so your team can help customers with fewer clicks.

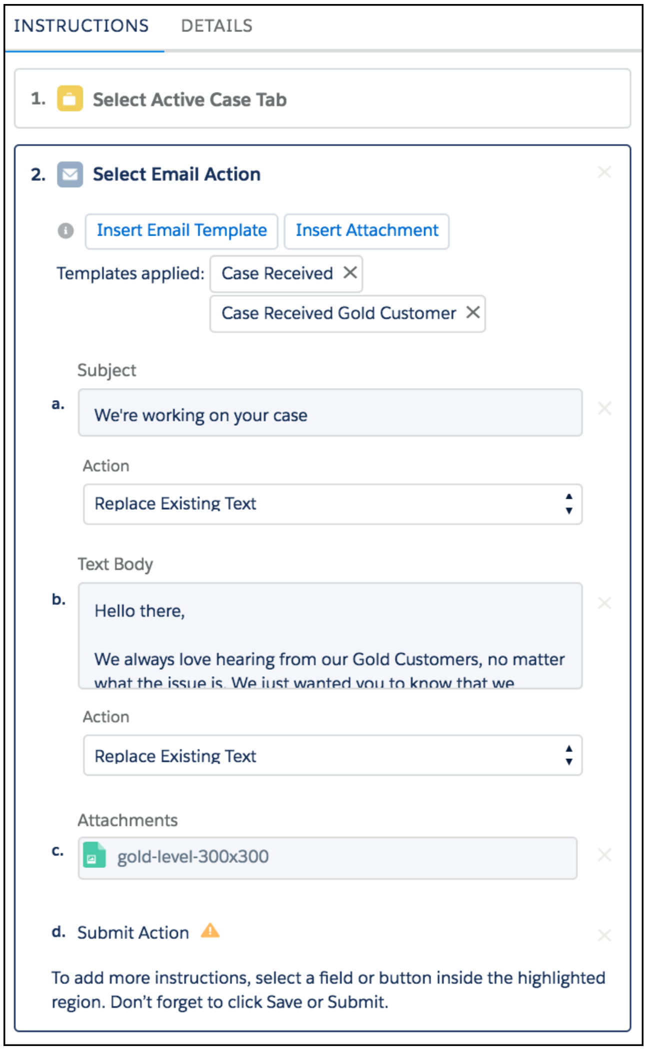
Why Do We Use Them?

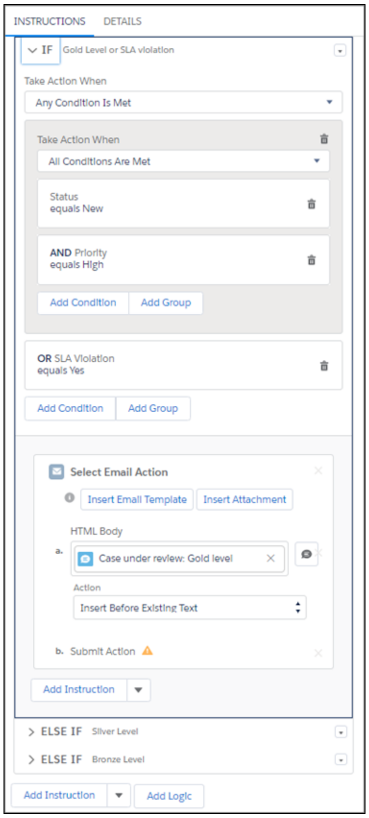
Macros speed up the process of getting your customers the support they need by automating repeated tasks for your team. Instead of jumping around to find the right tools, you can solve a customer issue with a single click.

The Macro Builder is where you set the logic behind the magic. The left side of the page displays a canvas with a sample record for the object you selected, like a case (1). The right side of the page lets you specify the instructions and details for the macro (2).



Set the instructions and logic that you need to get everything done in one click. You can use macros to send canned responses, escalate cases that meet certain conditions, attach a commonly-reference Knowledge article, change a case's status, and more.


INSTRUCTIONS
DETAILS
1. Select Active Case Tab
2. Select Email Action
Insert Email Template
Insert Attachment
Templates applied:
Case Received
Case Received Gold Customer
Subject
a.
We're working on your case
Action
Replace Existing Text
Text Body
b.
Hello there,
We always love hearing from our Gold Customers, no matter
Action
Replace Existing Text
Attachments
c.
gold-level-300x300
d. Submit Action
To add more instructions, select a field or button inside the highlighted region. Don't forget to click Save or Submit.



Why Are They Important?

By saving you and your customers time on getting support, you can focus on optimizing your service for the future.

SEE ALSO:

Set Up and Use Macros
Add Logic to Macros

Learn Best Practices for B2C Businesses

If you're running a small business that works with customers directly, you've definitely got a lot going on. Whether it's stocking shelves or responding to questions, managing your business is an all-consuming task. With Essentials, you can bring email, tasks, and all your other to-dos right into Salesforce. Here are our top recommendations for getting the most out of Essentials.

Bring Your Emails into Essentials, Automatically.

If you're ever frustrated when you're trying to look at multiple tabs to write a single email, have we got news for you. All of that can be viewed on a single screen with Essentials. With Einstein Activity Capture, your emails and events are automatically brought into Salesforce. That means you see contact information for each customer, how they last interacted with your business, and any other relevant info on a single page. The best part about it? Once you set it up, you'll never have to juggle all those sheets, documents, and tabs again.

Create One Giant Database.

Every time a customer comes into your shop, looks at a property, or inquires about your services is a great opportunity to get contact information for your next email campaign or promotion, right? Storing their information in the Contacts object makes it easy for you to find their info or see any interaction they've had with your business. And don't forget, you'll see all emails related to that contact thanks to Einstein Activity Capture.

Note: The **Contacts** object includes an Account field that you'll need to fill out. Use a dummy name like *CustomerAccount* to fill in this field for individual customers. Then you'll be able to sort by that dummy name in both the Contacts and Accounts objects.

Turn Customer Questions into Cases.

If you're working with customers on a regular basis, then you know that customers love to ask questions. Queries about sizing, contracts, hours of operation and more. You may not have support agents waiting to tend to their every need, but you do have cases! With Email-2-Case and Web-2-Case, customer emails or submissions from your company's website are automatically turned into cases and brought right into Essentials. Then you can sort or rank them to make sure that top priority cases get your attention ASAP.

Set Reminders and Create Tasks to Level Up Your Customer Experience.

Ever get a coupon for your birthday that causes you to go out for some retail therapy? What about nudge every few months that your teeth need a cleaning? These timely, helpful reminders keep business coming back to you and let customers know you care about them. Let Essentials remind you when it's time to follow up or send that annual birthday email to keep customers coming back for more.

SEE ALSO:

Use Einstein Activity Capture
Sync Emails and Activities
Turn Emails and Social Media Posts into Cases
Tasks
Events and Calendars
Activity Reminders and Notifications

Add Your Apps to Salesforce Essentials

Want to extend the functionality of your Salesforce platform? Not sure where to start? While Salesforce Essentials doesn't come with API access, our support coaches have gathered what they believe are the *most essential* apps to extend functionality. Check out our **AppExchange** to integrate some of the tools you already use and love with Salesforce.

Re-engage Inactive Leads and Customers

If a lead or customer hasn't purchased or accessed your product in about 30 days, consider them inactive. This behavior doesn't mean they're no longer interested; it's just time to remind them about your great products and service.

We recommend sending a virtual hello through email. An inactive person probably doesn't want to be put on the spot with a phone call. Snail mail is more likely to find its way to the recycle bin than the customer's thoughts. Email is the happy medium of outreach to someone who just needs a nudge. After all, most people check their inbox daily.

A few best practices can speed this email on its way.

- Create an email template to ensure that your message is clear and well thought out. Add a merge field to capture the lead or customer's first and last name. If you have different audiences, you can make a few email templates. It's always easier than writing a message to each person from scratch.
- Add the Email Opt Out field to your record page layout. Select it when a lead or contact says they no longer wish to receive communication from you. If you send an individual or mass email to a person with this field selected, the email is not delivered to the addressee.
- Add the Last Activity field to your lead and contact records to show the date and time that you last communicated with your customer.
- Send the email one of three ways

Problem	Solution	How It's Done
Don't have many customers who go inactive? Want to keep a close eye on communications?	One by one	Open the lead or contact, and send the email template from there.
Torn between having a large, inactive group or customers but still want oversight into who receives an email?	Manually, in bulk	Pull inactive leads or contacts together in a list view. Filter this list view by the Last Activity field. Select all records in the list view, and send a list email with the template.
A little extra effort on the front end saves you time on the back end.	Automatically in bulk	Use Process Builder to send emails weekly, monthly, or quarterly to inactive leads. You create your own process, but you can check out our sample recipe for ideas.

Create a Process to Re-engage Inactive Leads
You can use Process Builder to email inactive leads when it's been 30 days since their last communication.

SEE ALSO:
Individually Opting Out of Email
Turn On Activity Metrics
Work with List Views in Lightning Experience
Email Templates

Create a Process to Re-engage Inactive Leads

You can use Process Builder to email inactive leads when it's been 30 days since their last communication.

Create a Field to Capture Last Activity Date

1. Click the gear icon, and open **Setup**.
2. Search for `Einstein Activity Capture Settings` in the Quick Find box and turn on **Activity Metrics** under the Capture settings.
3. Create a custom field on the Leads object by navigating to the Object Manager and selecting the **Leads** object.
4. Select the **Formula** Data Type.

5. Select **Formula** as the Data Type and **Date/Time** for the Formula Return Type.
6. Label the field `Last Activity Date` and use this formula: **ActivityMetric.LastActivityDateTime**
7. Save your changes.

Create Process Criteria

1. Search for `Process Builder`in the Quick Find box.
2. Click **New**.
3. Name your process. For example, `30-Day Follow-up Email to Leads`.
4. Click inside the **API Name** box to copy your process name over.
5. Click **The Process starts when**, and choose **A record changes**.
6. Save your process.
7. Click **+ Add Object**.
8. Choose **Lead** from the Object dropdown menu.
9. Below Start the Process, select **when a record is created or edited**.
10. Save your changes.
11. Click **+ Add Criteria**.
12. Name your criteria. For example, `Is still an active lead`.
13. Add two conditions: **Status** > **does not equal** > **picklist** > **Unqualified (not interested at this time)**. Note: if you've rename your Unqualified status, select the status where the lead is marked as lost or not interested.
14. Click **+ Add Row**, and choose **Converted** > **equals** > **boolean** > **False**.
15. Click **Advanced**, and check the box to make changes **only when specified changes are made to a record**.
16. Save your changes.

Create an Email Alert Process Action

1. Under Scheduled Actions, click **Set Schedule**.
2. Add `x` days after Last Activity Date. For example, if you enter `30` for the days, the automation will trigger 30 days after the Last Activity Date.
3. Save your changes.
4. Click **+ Add Action**.
5. Choose **Email Alert** from the Action Type dropdown menu.
6. Name the action. For example, `30-Day email reminder since last contact`.
7. You have two ways to add an email alert: If you've already created one, search for and select it. If you don't have an existing email alert, click to create one. Note: We've linked to an article that explains how to create an email alert and template at the end of this help topic.
8. Make sure that you use the Lead object and select **Email Field** as the Recipient Type. Tip: Select **Current User's email address** in the From Email Address field. This ensures the email comes from the Lead owner's email address and not from a generic email.
9. Save your changes.

Create a Task to Log the Email in the Activity Feed

1. Click **+ Add Actions** again.
2. Choose **Create a Record** as the Action Type.
3. Name the action `30-Day Follow-Up Email Sent`.
4. Select **Task** for the Record Type.
5. A Set Field Values box appears. Choose the following values: **Assigned To ID** > **Field Reference** > **Owner ID Priority** > **Picklist** > **Normal Status** > **Picklist** > **Completed**.
6. Click **+ Add Row**, and choose **Subject** > **String** > **30-Day Follow-Up Email Sent**.
7. Click **+ Add Row**, and choose **Name ID** > **Field Reference** > **Lead ID**.
8. Save your changes.
9. Click **Activate**.

SEE ALSO:

Einstein Activity Capture

Process Builder

Manage Your Contacts with These Best Practices

Storing and managing contact data in your CRM means that you get to know your customer and understand the timeline of your relationship with the customer. You also get a big-picture view of how all your customers benefit your business.

Store and Organize Customer Data

A traditional business card can only be held in the hands of a single person at a given time. A CRM lets you take that business card data and store it in a place where your whole team can access it. When managing data access and getting to know your customer, keep these tips in mind.

- **Make sure that everyone has easy access to the data:** If everyone on your team has a Salesforce license, everyone can view the contact's details right in the app. If only one of you has a Salesforce license, it's a best practice to export and email the data to the right people. Either way, the data is readily accessible and deliverable.
- **Keep your data clean:** The biggest troublemaker in any contact management system is dirty data. This includes duplicate entries, inaccurate information, and incomplete records that make your reporting inaccurate. Make it a priority to keep that info squeaky clean to save yourself time later on.
- **When in doubt, add the contact:** Not sure about adding someone as a contact? Just do it. Whether it's a person you eventually market to or someone you buy from, adding any contact (and all of their information) to your database can help grow your network.
- **Use automation whenever you can:** Salesforce brings your emails, phone calls, and related notes into your contact record for you. Avoiding the manual misery of entering data into the contact record makes it much easier for you to keep things up-to-date.

Examine Your Relationship with Each Customer

Access each customer's activity feed to see the entire timeline of your relationship with them. You can see how deals moved through the pipeline, the email campaigns sent, and the customer support provided. If you have many contacts, it's practically impossible to remember every interaction. A CRM can help you keep track of the work your team does with each contact.

- **Add to the paper trail:** Some activities, such as emails, phone calls, and status updates, are automatically added to a contact's Activity feed. Others are not. If you take action behind the scenes to move a contact forward, add an internal note to the feed so others working with the contact know.
- **Attach related docs:** If you have docs that exist outside of Essentials, you can attach them to the contact so the full picture is available.
- **Review the data:** Read through the activity feed before engaging a customer so you don't duplicate efforts with a teammate. This can also help you provide a tailored experience based on what they've done so far.

See the Big Picture of How Your Customers Correlate to Business Success

Run reports to get a high-level view of the customer base: Create a report to show your team a snapshot of the customer base. This could be something like, `Days Since Last Activity per Contact`, or `# Opportunities per Contact`. Use list views to segment customers: If your team prefers to look at the individual tasks making up the data, a list view is the best option. You can segment customers by fields on their profile or important dates and times.

SEE ALSO:

Creating a Custom Report

Automate Your Business Routines

Save time by automating your business practices. Rules, Process Builder, and Flows turn your repetitive workload into automated actions that do work for you.

Choosing the right tool depends on your goal.

Assignment, Escalation, and Auto-Response Rules are pre-defined. These rules work with the lead or case records. Specifically:

- Lead assignment rules automatically route a new lead to the right user.
- Web-to-lead and case auto-response rules automate your first reply to a lead or customer.
- Case escalation rules let you automatically route a case to the right user.

If you want to do something outside the narrow scope of rules, check out Process Builder. A Process is a simple if/then statement: If certain criteria are met, then take an action.

Example: **If** the VIP field is checked on a Contact record, **then** send an email to all VIP contacts.

Use Process Builder to automate record creation, record updates, emails, and more.

Flow Builder is your backup plan when you want to do something Process Builder can't. For example, you want to automate record deletion. Or you want to base your criteria on more than one kind of record. Flows help you automate such edge cases.

Our Support Coaches compiled a list of recipes for common business processes you can automate.

Create a Round Robin Lead Assignment Rule

Keep your team's workload even by auto-assigning new leads to each user.

Reach Out to Customers After Winning an Opportunity

Our process builder recipe can automate your communication with a contact or customer from whom you won an opportunity. After winning an opportunity, you often have a reason to reach out to the contact or customer. For example, you want to thank them. Or you want to send them a survey to rate customer satisfaction. Maybe that follow-up is even an opportunity to cross-sell.

Remind Your Sales Team When a Renewal Comes Due

Create a Process to remind users when a customer's recurring subscription comes due. Reduce churn by nurturing your recurring revenue.

Allow Customers to Opt Out of Emails

Give customers the choice to opt out of marketing emails. Flow builder logs a lead or customer's unsubscribe request in Salesforce. Process Builder launches the Flow when there's a new unsubscribe request.

SEE ALSO:

Assignment Rules

Set Up Auto-Response Rules

Set Up Escalation Rules

Process Builder

Flow Builder

Choosing Which Salesforce Flow Feature to Use

Create a Round Robin Lead Assignment Rule

Keep your team's workload even by auto-assigning new leads to each user.

Round robin assignment means that each new lead is assigned to a different user until everyone has been assigned the same amount and the cycle repeats.

For example, if you have three users:

- Lead 1 is assigned to user 1
- Lead 2 is assigned to user 2
- Lead 3 is assigned to user 3, then the cycle repeats
- Lead 4 is assigned to user 1
- Lead 5 is assigned to user 2
- Lead 6 is assigned to user 3, then the cycle repeats.

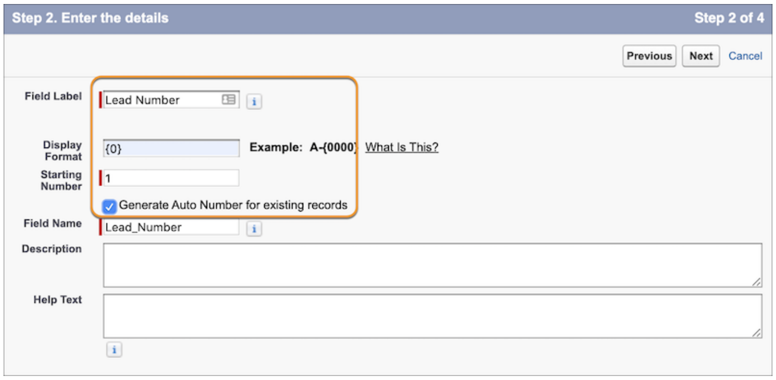
You can set up round robin lead assignment with a few custom fields and a lead assignment rule.

Create a Lead Number f+Field

Creating a Lead Number f+Field gives each new lead a unique ID.

1. Open Setup.
2. Search for `Object Manager`, and open it.
3. Click **Lead**.
4. Click **Fields & Relationships**.
5. Click **New**.
6. Select **Autonumber**, and click **Next**.
7. Name your field `Lead Number`.
8. In Display Format, enter `{0}`.
9. In Starting Format, enter `1`.

10. Check the box to **Set this field as the unique record identifier from an external system**, and click **Next**.
11. Give user permission to the right people, and click **Next**.

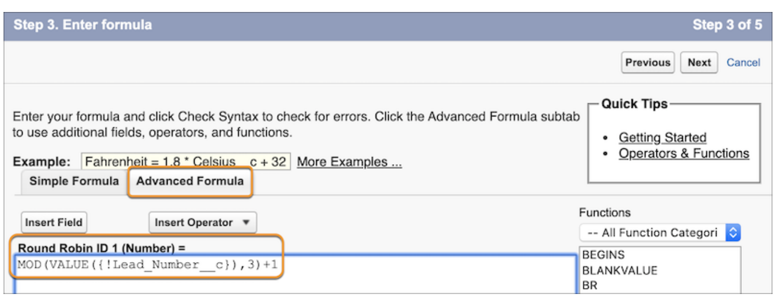


12. Uncheck all **Page Layout** boxes, and click **Save & New**.

Create a Round Robin Field

The round robin field tells the system to assign each new lead to the next user in order.

1. Select **Formula**, and click **Next**.
2. Name your field. For example: `Round Robin`.
3. Select **Number**.
4. In the Decimal Places dropdown, choose `0`, and click **Next**.
5. Select **Advanced Formula**.
6. In the **Test (Number)** =field, paste in this formula: `MOD(VALUE({!Lead_Number__c}),3)+1`. There are two things to note: 1) The phrase Lead_Number pulls the name of the field you created in the previous section. If you gave it a different name, make sure to update it in the formula. 2) Replace the number 3 with the number of users you want in your round robin rotation.

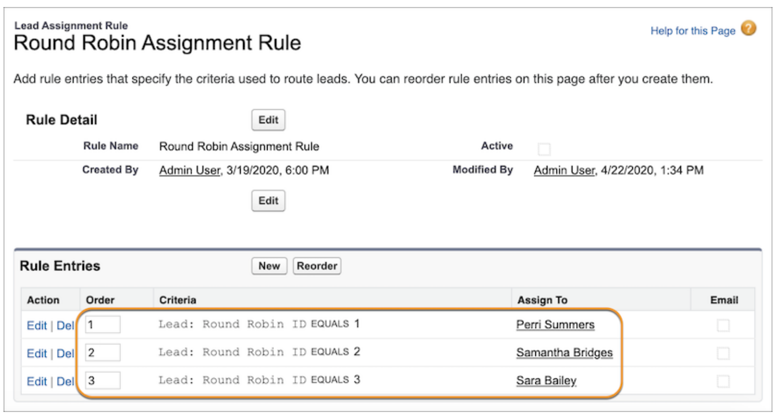


7. Click **Next**.
8. Give user permission to the right people, and click **Next**.
9. Uncheck all **Page Layout** boxes, and click **Save**.

Create a Lead Assignment Rule

The lead assignment rule ensures that leads are assigned evenly across users.

1. In Setup, search for `Lead Assignment Rules`, and open it.
2. Click **New**.
3. Name your rule `Round Robin Assignment Rule`, and click **Save**.
4. Click to open Round Robin Assignment Rule.
5. In the Rule Entries section, click**New**.
6. In Sort Order, enter `1`.
7. Set the rule criteria by choosing **Round Robin** in the Field dropdown, **Equals** in the Operator dropdown, and **1** in the Value field.
8. Select the user this rule applies to.
9. Optionally, select an email template to tell the user that the rule has been assigned to them.
10. Repeat steps 5 through 9 for each user in your round robin rotation. Give each user in your org a number. Every time you add a user to the round robin rotation, change the sort order and the round robin equals number to the user's number.



Allow Round Robin Lead Assignment on Manually-Created Leads

1. In Setup, click **Object Manager**.
2. Click **Lead**.
3. Click **Page Layouts**.
4. Open **Lead Layout**.
5. Click **Layout Properties**.
6. Next to Lead Assignment Checkbox, check the box to **Show on edit page**, and click **Okay**.
7. Save your changes.

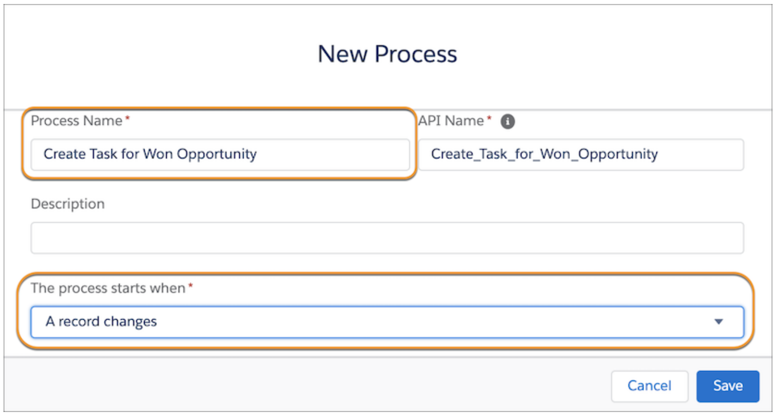
Reach Out to Customers After Winning an Opportunity

Our process builder recipe can automate your communication with a contact or customer from whom you won an opportunity. After winning an opportunity, you often have a reason to reach out to the contact or customer. For example, you want to thank them. Or you want to send them a survey to rate customer satisfaction. Maybe that follow-up is even an opportunity to cross-sell.

Start with creating a process.

1. Open Setup.

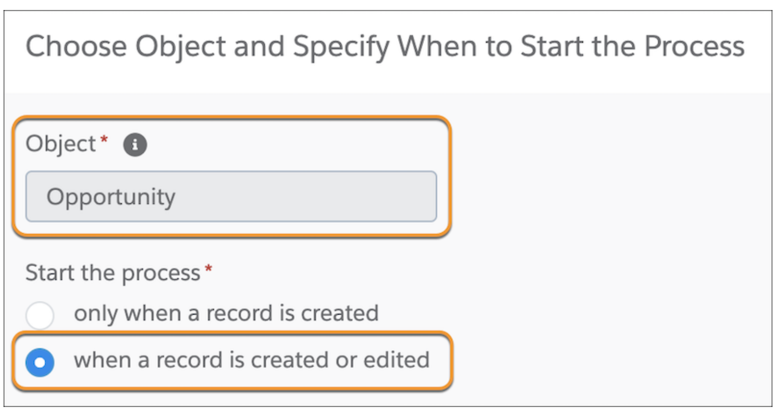
2. Type `Process Builder` into the Quick Find box, and open it.
3. Click **New**.
4. Name your process `Opportunity Task Creation`.
5. In the Process Starts When dropdown menu, select `A record changes`.



6. Save your changes.

Base the Process on an Opportunity Being Edited

1. On the Process map, click **+ Add Object**.
2. From the Object dropdown, select **Opportunity**.
3. Select to start the process **when a record is created or edited**.

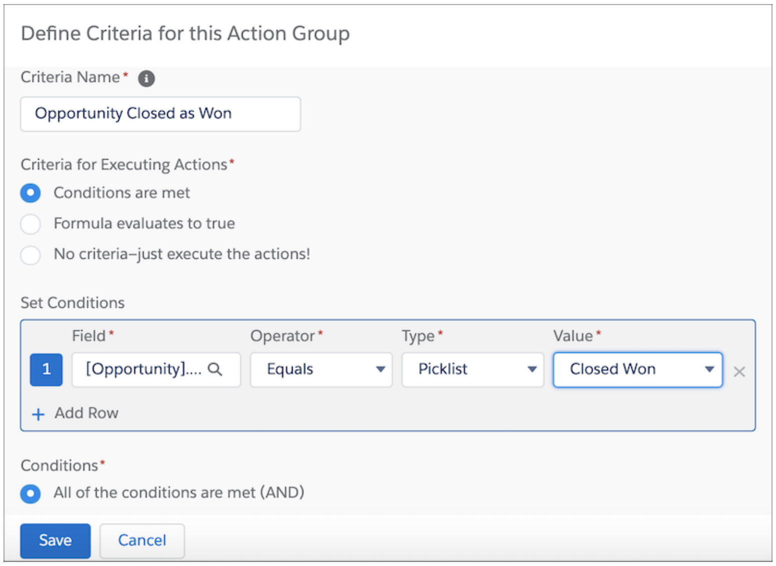


4. Save your changes.

Tell the Process What Criteria Causes it to Run

1. Name your criteria `Oppportunity Closed as Won`.
2. Under Criteria for Execution Actions, select **Conditions are met**.
3. Under Set Conditions, choose **Stage** > **Equals** > **Picklist** > **Closed Won**.

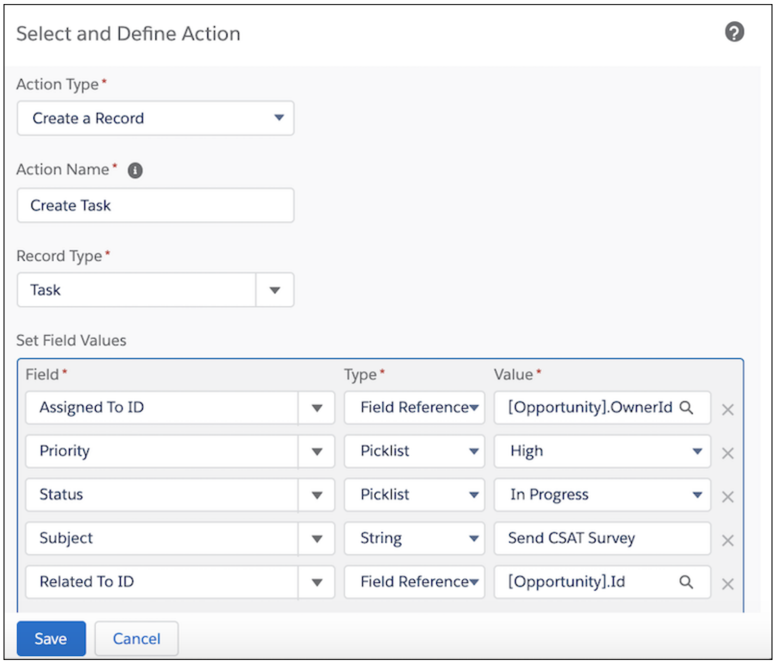
4. Under Conditions, choose **All of the conditions are met (AND)**.



5. Save your changes.

Tell the Process What To Do When Criteria are Met

1. Click **Add Action** on the process map.
2. Choose **Create a Record** from the Action Type dropdown.
3. Name your action **Create Task**.
4. Select **Task** as the record type.
5. Under Set Field Values, select **Assigned to ID** > **Field Reference** > **Owner ID**.
6. In the next row, set **Priority** > **Picklist** > **High**.
7. Next, select **Status** > **Picklist** > **In Progress**.
8. Click **+Add Row**, choose **Subject** > **String** , and then enter a subject line for your task.
9. Click **+Add Row**, and choose **Related To ID** > **Field Reference** > **Opportunity ID**.



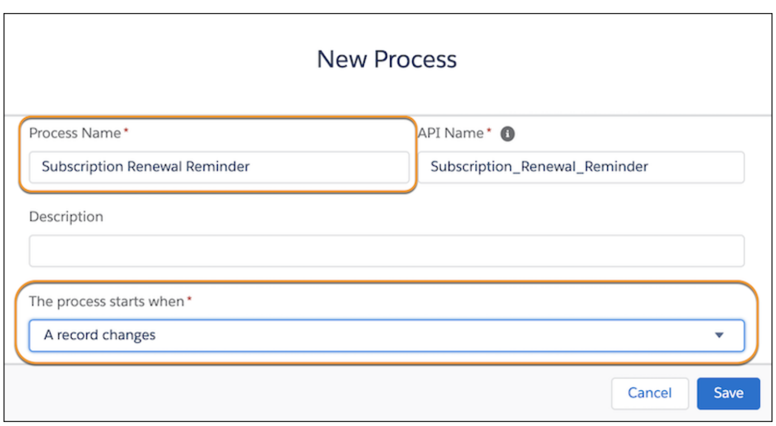
10. Save your changes.
11. Activate your process. It now runs whenever criteria are met.

Remind Your Sales Team When a Renewal Comes Due

Create a Process to remind users when a customer's recurring subscription comes due. Reduce churn by nurturing your recurring revenue.

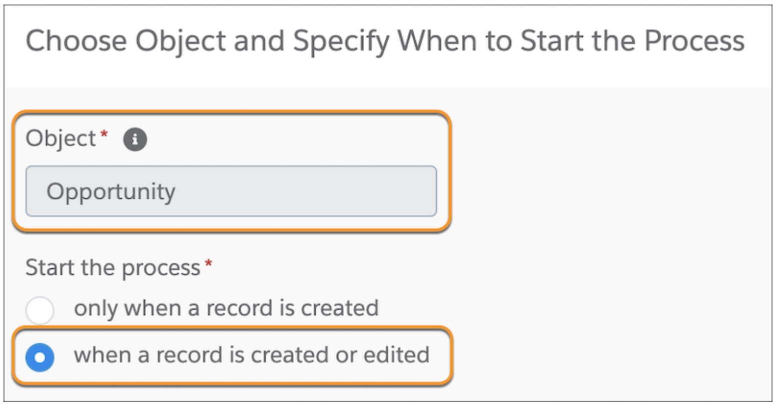
Create a Process

1. Open **Setup**.
2. Search for `Process Builder` in the Quick Find box, and open it.
3. Click **New**.
4. Name your Process something like `Subscription Renewal Reminder`.
5. Under the process starts when dropdown, select **A record changes**.



6. Save your changes.

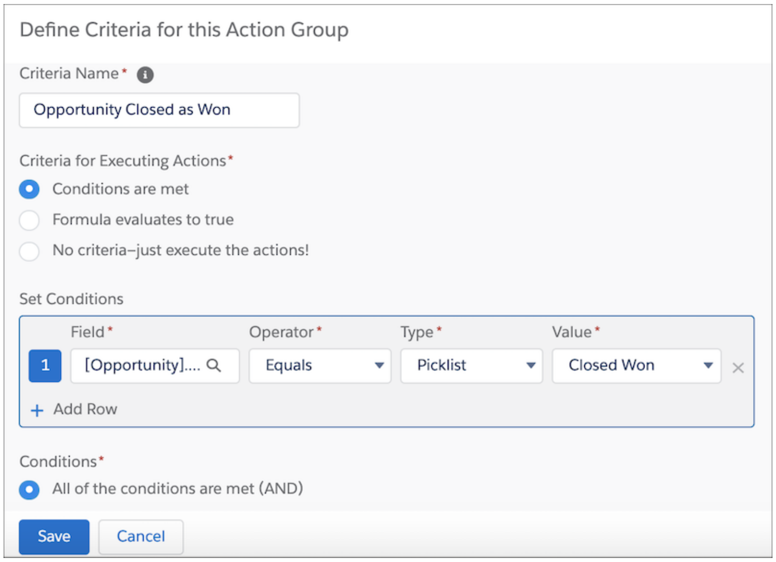
Tell the Process That It's Based On an Opportunity Being Edited

1. Click **+ Add Object** on the process map.
2. From the Object dropdown, select **Opportunity**.
3. Under start the process, choose **when a record is created or edited**.
4. 

5. Save your changes.

Tell the Process What Criteria Causes It to Run

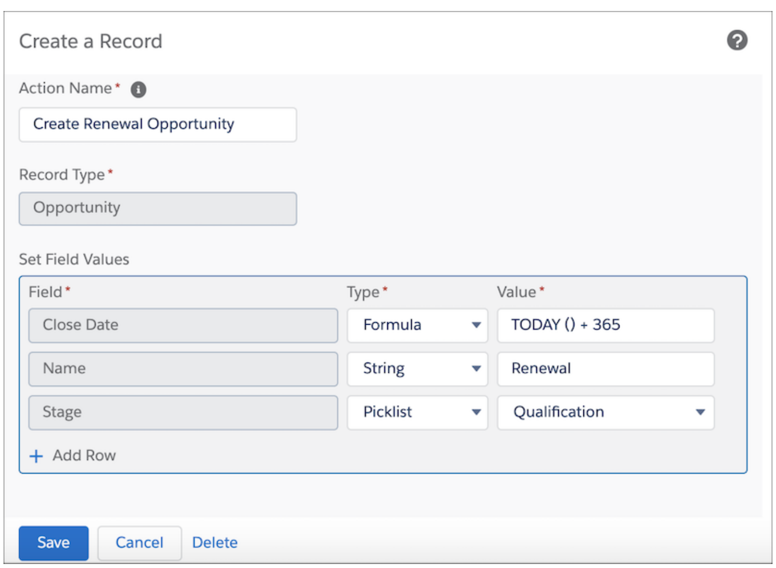
1. Click **+ Add Criteria** on the process map.
2. Name the criteria `Opportunity Closed as Won`.
3. Under Define Criteria for this Action Group, select **Conditions are met**.
4. Under Set Conditions, choose **Stage** > **Equals** > **Picklist** > **Closed Won**.
5. Under Conditions, select **All of the conditions are met (AND)**.



6. Save your changes.

Tell the Process What to Do When Criteria are Met.

1. Click **+ Add Action** on the process map.
2. Under Action Type, select **Create a record**.
3. Name your action `Create Renewal Opportunity`.
4. Under Record Type, select **Opportunity**.
5. Under Set Field Values, choose **Close Date > Formula**, enter the formula `TODAY () + 365`, and click **Use this Formula**.
6. In the next row, select **Name > String > Renewal**.
7. In the next row, select **Stage > Picklist > Qualification.**



8. Save your changes.
9. Activate your process. It now runs whenever criteria are met.

Allow Customers to Opt Out of Emails

Give customers the choice to opt out of marketing emails. Flow builder logs a lead or customer's unsubscribe request in Salesforce. Process Builder launches the Flow when there's a new unsubscribe request.

Build your email opt-out flow and process with these steps.

1. Complete Pre-Work for the Email Opt-Out Flow
   Create one queue, activate two fields, and connect your support email address before building your Flow.
2. Create an Email Opt Out Flow
   Create a Flow that lets leads and contacts unsubscribe from your email campaigns.
3. Create a Process to Trigger the Email Opt Out Flow
   You created a Flow to check the Email Opt Out box when leads and contacts unsubscribe. Now tell the system to launch that Flow when a new case enters the Unsubscribe Requests queue.

Complete Pre-Work for the Email Opt-Out Flow

Create one queue, activate two fields, and connect your support email address before building your Flow.

Create an Unsubscribe Requests Queue for Cases

1. Open **Service Setup**.
2. Search for `Queues`, and open it.
3. Click **New**.
4. Name your Queue `Unsubscribe Requests`.
5. Move **Case** to the Selected Objects column.
6. Find the users who need access to the queue, and move them to the Selected Members column.
7. Save your changes.

Connect Your Support Email Address So Customer Emails Automatically Become Salesforce Cases

1. Open **Setup**.
2. Search for **email-to-case** in Quick Find, and open it.
3. Scroll down to the Routing Addresses, and click **New**.
4. Give your email address a Routing Name like `Support Email Address`.
5. Enter your email address, and fill in the rest of the fields.
6. Save your changes.
7. Verify your email address via the verification email that's sent to you.
8. Back on the Email-to-Case landing page, click the name of the email address you just added.
9. Look for the yellow banner with a support address that was created for you by Salesforce. Copy and paste that email address into the email forwarding settings for your email client.

10. Click **Edit**.
11. Select **Queue** from the Case Owner dropdown.
12. Search for the **Unsubscribe Requests** queue you just created.
13. Select your desired case priority.
14. Set the Case Origin field to **Email**.
15. Save your changes.

Add the Email Opt Out Field to Contacts

1. Go to **Object Manager** > **Contact** > **Fields & Relationships** > **Email Opt Out** > **Set Field-Level Security**.
2. Choose which users have visibility into this field.
3. Save your changes.

Add the Email Opt Out Field to Leads

1. Go to **Object Manager** > **Contact** > **Fields & Relationships** > **Email Opt Out** > **Set Field-Level Security**.
2. Choose which users have visibility into this field.
3. Save your changes.

Create an Email Opt Out Flow

Create a Flow that lets leads and contacts unsubscribe from your email campaigns.

Create a New Flow

1. Open Setup.
2. In the Quick Find box, search for `Flows` and open it.
3. Click **New Flow** > **Autolaunched Flow** > **Create**.

Check the Email Opt Out Box When a Lead Unsubscribes via Email-to-Case

1. Click and drag **Update Records** on the canvas.
2. Provide a label like `Update Lead`.
3. Click **Specify conditions to identify records, and set fields individually**.
4. Select **Lead** as the object.
5. Select **Conditions are Met** as the Condition Requirements.
6. Select **Email** > **Equals** > **New Resource**.
7. Select **Variable** as Resource Type.
8. Provide an API Name like `WebEmail`.
9. Select **Text** as Data Type.
10. Check both **Available for input** and **Available for output** check boxes.
11. Click **Done**.

12. Confirm {!WebEmail} is listed in the Value field.
13. Under Set Field Values for the Lead Records, select **HasOptedOutOfEmail** for the Field.
14. Select **$GlobalContstant.True** as the Value.
15. Click **Done**.

Check the Email Opt Out Box When a Contact Unsubscribes via Email-to-Case

1. Click and drag **Update Records** on the canvas.
2. Provide a label like `Update Contact`.
3. Specify conditions to identify records, and set fields individually.
4. Select **Contact** as the object.
5. Select **Conditions are Met** as the Condition Requirements.
6. Select **Email** > **Equals** > **Web Email**.
7. Under Set Field Values for the Lead Records, select **HasOptedOutOfEmail** for the Field.
8. Select **$GlobalContstant.True** as the Value.
9. Click **Done**.

Activate the Flow

1. Drag the small circle from Start to Update Records: Update Lead.
2. Drag the small circle from Update Records: Update Lead to Update Records: Update Contact.
3. Save your changes.
4. Name your Flow something like `Unsubscribe Flow`, and save your changes.
5. Click **Activate**.
6. Click the **Back** button.

Create a Process to Trigger the Email Opt Out Flow

You created a Flow to check the Email Opt Out box when leads and contacts unsubscribe. Now tell the system to launch that Flow when a new case enters the Unsubscribe Requests queue.

Create a New Process

1. Open Setup.
2. Search for `Process Builder` and open it.
3. Click **New**.
4. Name your Process something like `Case`.
5. In the A process starts when dropdown menu, select **A record changes**.
6. Save your changes.

Tell the Process to Run When a Case Is Created

1. Click **Add Object**.

2. Choose **Case** as the Object.
3. Choose the Start the process **only when a record is created**.
4. Save your changes.

Tell the Process to Run When a New Case Enters the Unsubscribe Requests Queue

1. Click **+ Add Criteria**.
2. Name your Criteria something like `New Unsubscribe Case`.
3. Under Criteria for executing actions, select **Conditions are met**.
4. Under Set Conditions, choose **Owner ID (Queue) > Name**.
5. Click **Choose**.
6. Set the Operator as **Equals**.
7. Set the Type as **String**.
8. For Value, enter the name of the Queue. In this case, `Unsubscribe Requests`.
9. Click **+ Add Row**.
10. In the fields, enter **Email Address** > **Does not equal** > **Global Constant**.
11. Under Conditions, select **All of the conditions are met (AND)**.
12. Save your changes.

Run the Flow When the Above Criteria Are Met

1. Under Immediate Actions, click **+ Add Action**.
2. For Action Type, choose **Flow**.
3. For Action Name, call it something like `Launch Flow`.
4. Under Flow, Choose the **Unsubscribe Flow** you just created.
5. Click **+ Add Row**.
6. In the fields, choose **Web Email** > **Field Reference** > **Email Address**.
7. Save your changes.
8. Click **+ Add Action** again.
9. Under Action Type, choose **Update Records**.
10. Give it an Action Name like `Update Case to Status Closed`.
11. For Record Type, choose**Select the Case record that started your process**.
12. Under Set new field values for the records you update, enter **Status** > **Picklist** > **Closed**.
13. Save your changes.
14. Click **Activate** > **Confirm**.

Best Practices for Marketing Teams

Marketing outreach is key to attracting new leads and retaining customers. Whether you want to send a promotion to a loyal customer or reach multiple new leads with an offer, we have tools to help.

Problem: You Spend Too Much Time Retyping the Same Emails

Create an email template once to send a common communication as many times as you want. Use merge fields to personalize the message. Merge fields pull field data like contact name or opportunity value into your message. Insert an email template when you send email from a record page.

Problem: You Want Wide and Simultaneous Marketing Communications Distribution

List email lets you send separate emails to multiple leads or multiple contacts in a single action. You can send up to 200 emails from a contact or lead list view at a time. List email is great for small-scale sales campaigns or basic marketing outreach.

Problem: You Want More Marketing Reach Than List Email Offers

If your marketing efforts outgrow list email, use Campaigns instead. For example, you want to email more than 200 people at once. Or you want to email leads and customers together. And you want to track the success of your outreach. Send list email from a Campaign (instead of a list view) to accomplish these goals. Campaigns also work with Salesforce Marketing Cloud Engagement, Marketing Cloud Account Engagement, or a third-party application in the AppExchange to help you deliver more robust marketing outreach.

SEE ALSO:

Email Templates

Send List Email in Lightning Experience

Get to Know Salesforce Campaigns

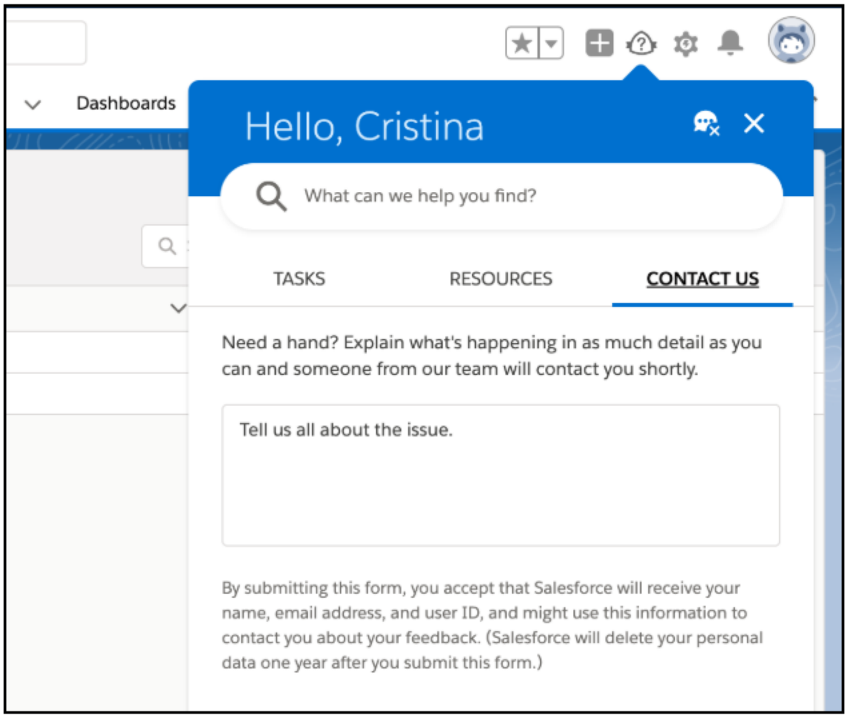
Get Help

Having some trouble? We can help.

You can reach out to the Essentials Assistant chatbot or log a case any time to get personalized help. We also have tons of resources to help you get on your way.

If you have a question about signing in, resetting your password, or something else quick and easy, the Essentials Assistant is the fastest way to find a solution. To chat with the Assistant, click the floating chat icon.

If you're experiencing a technical issue or have questions that require more hands-on assistance, log a case. To log a case, open in-app help and click **Contact Us**.



When you log a case, we recommend that you write down what sort of error messages popped up (if any) and describe in detail the issue you're running into.

You can also search for help articles in our in-app help when embarking on your troubleshooting journey. In addition, you can always check our resources page, ask the trailblazer Community, or join a hands-on workshop.

Essentials Resources

Learn more about Essentials with helpful videos and a guided journey. Or, hit the trails with our Essentials-focused modules on Trailhead.

Resource	What It Is
Success with Salesforce Essentials	A guided journey that helps you get set up, learn best practices, and supercharge your sales and support teams.
Essentials Trailblazers Community	A community where you can get your questions answered, learn best practices, and stay up-to-date on product announcements.
Essentials Hands-On Workshop	Hands-on workshops run by friendly experts ready to guide you on your Salesforce Essentials journey, and they're available live and on-demand.
Videos	
Series: Salesforce Essentials 1-Minute Feature Tours (English Only)	See Essentials in action, one minute at a time.
Series: Getting Started with Salesforce Essentials (English Only)	Two videos to help you learn the basics of CRM and Essentials. Learn the concepts behind how Salesforce works, then see it all in action in Essentials.

Resource	What It Is
Import Your Data into Salesforce Essentials (English Only)	A video that walks you through preparing your data file for import, creating a custom field, and using the Data Import Wizard to create new accounts and contacts in Salesforce.
Series: Getting Started with Help Center (English Only)	Two videos that show you how you can easily build a branded self-service site that helps your customers quickly find answers to their questions and to get in touch with your support team if they need more help. Knowledge lets you write helpful articles, and Help Center lets you display them for customers.
Salesforce Essentials YouTube Channel (English Only)	A YouTube channel where you can find more helpful videos and demos of Salesforce Essentials.
Trailhead	
Discover Salesforce Essentials	A set of educational modules that walk you through how to use Essentials and why it's an ideal solution for your small business.