

**Real-time**

Update on the move
use Salesforce mobile.

**Daily**

Update your dashboard –
input information.

**Weekly**

Get your Forecast up to
date – input information.

LEADS

All B2C Direct Consumer – Supply & Install needs to start as a Lead.

- Select the appropriate Lead Source.
- Web leads will be assigned to a BU Leader who will Change Owner to a sales person.

ACCOUNTS

Set up NEW, correct and complete.

- Choose proper Account Type.
- Compose a proper Account Description.
- Monitor and update – Post RT | D | W, or as needed.
- Use Views for added visibility – All Accounts – Create a New View for more specific details.



Set up all CONTACTS

- Include personal information – build your relationships.

OPPORTUNITY

Set up NEW before quoting, correct and complete.

- Choose the correct Type.
- Assign all quotes and set the Amount and Close Date [Date the order will be uploaded]
- Monitor and update – Post RT | D | W, or as needed.
- Use Views for added visibility – Closing this Month or SEE Forecast.

Review WORK INSTRUCTION – Project Opportunity for specific details for projects.

FORECAST

Review your Forecast daily / weekly – keep it up to date, keep it real! use for Opportunity management.

- Set correct Forecast category – Pipeline, Best Case and Commit.
- Let the system work for you – Close Won is automatic as long as quote used for order upload is in the Opportunity.

DASHBOARD & REPORTS

Refresh your Dashboard daily.

- Click on Dashboard for quick access to Sales and F2F activities.
- Explore and use Reports to gain a better understanding of your customers and activities, and as a planning tool.

CASES

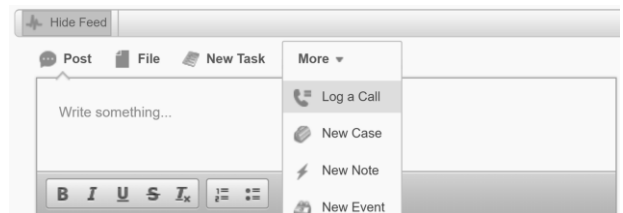
Monitor on-going Cases and get in front of issues.

- Click on Dashboard for quick access to Sales and F2F activities.
- Explore and use Reports to gain a better understanding of your customers and activities, and as a planning tool.

CHATTER – Tell a story

Use the **Feed** at the Account, Contact or Opportunity.

- **Post** comments [use @personsname]
- **File*** and **Post** Information
- **Post a New Task**
- **Log a Call*** (F2F and important phone calls) and add a **New Note*** or **New Event**



* Files, Notes and Logged call in the Feed will also be will be filed in Open Activities, Activity History or Notes & Attachments below.

**Need help?**

- Click on **Help & Training** – or – **Tell me more!** | **Help for this Page** ?
- Go to www.trailhead.salesforce.com
- Work with your Leader and set up a training session.