

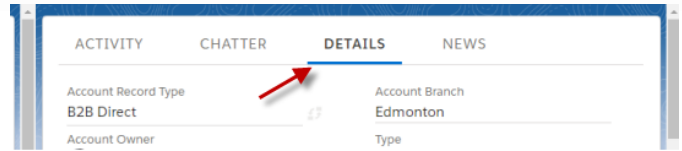
salesforce

### Salesforce CX SET UP PROCESS

# 48

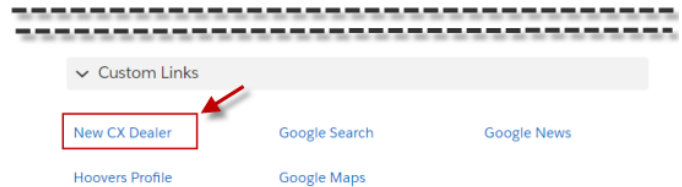
 Hours prior to Set Up

1 Open Account in Salesforce. In DETAILS screen, scroll to the bottom to Custom Links section and click **New CX Dealer**.



2 **New CX Dealer Setup Request** screen will appear.

- Required information will be automatically filled in from the Account.
- Verify the address and Discount.
- Dealers logo must uploaded to the Account before proceeding.
- All Contacts assigned to the account will be listed. Select the Contacts you want to be set up as CX Users. NOTE: All new users must have a valid email address and phone number.
- Enter any relevant comments for IT
- Click **Next**.



**New CX Dealer Setup Request**

Customer Number: 77  
Joe's Hardware  
8256 93A Ave NW  
Edmonton, AB, T6C 1V6

Logo Uploaded

Discount: 68.0%

Select the contact(s) from the list below to be provided with CX access for Joe's Hardware. Use **Ctrl-Click** to select multiple contacts.

**Contacts**  
Albert Einstein  
Atilla Hun  
Joseph Hicks

Comments

**Next**

3 If the Discount on the Account is not entered, or any of the selected Contacts are missing an email and/or phone number, an error screen will appear. You will need to correct the missing data then restart the request process. Click **Finish** to exit the screen.

**Missing Contact Information**

Atilla Hun is missing an email or phone contact.

Please ensure all selected contacts have a valid email address and phone number then resubmit your request.

Name	Email	Phone
Atilla Hun		(780) 123-4567

**Finish**

# WORK INSTRUCTION

## CX Dealer Set Up



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- 4 If all the data is correct, you will be presented with a verification screen. If changes are needed press Previous to go back.

Click **Next** to submit the request.

### Please Verify Your Request

Click **Next** to Submit. Click **Previous** to Make Changes

You are requesting the following customer and contacts be set up with CX Dealer version:

Account Number: 77  
Joe's Hardware  
8256 93A Ave NW  
Edmonton, AB, T6C 1V6

Approved Discount: 68.0%

Dealer Logo has been uploaded to Account

CX Logins to be created:

Name	Email	Phone
Albert Einstein	bjhicks99@gmail.com	(780) 123-4567
Joseph Hicks	barryh@durabuiltwindows.com	123-456-7890

Comments:

Previous **Next**

- 5 In the final confirmation screen, click **Finish** to exit.

### Submission Complete

Your new CX Dealer Request for Joe's Hardware has been submitted to IT Helpdesk.  
You will receive confirmation and installation instructions within 48 hours.

Press **FINISH** to exit.

**Finish**

- 6 Upon submission of the request, a Task will be created attached to the Account and assigned to IT Help Desk. Help Desk will receive an email notification of the task.

Next Steps More Steps

>  CX Dealer Setup  
Help Desk has an upcoming Task Today

- 7 Once IT finishes the set up, they will complete the Task. That will trigger a New Task to be created, assigned to the Account owner, to finish installation and training for the dealer. The Account owner will receive an email notification of the task.

Next Steps More Steps

>  CX Dealer Install Required  
You have an upcoming Task Today

Past Activities

>  CX Dealer Setup  
Help Desk had a Task Today

Load More Past Activities



### Set Up Day At the Dealer Location (preferred) or Team Viewer

- 1 IT will send the Dealer download / install the program and provides the Dealer with their User ID(s) / Password(s) – SEE Step 7 Salesforce Task.
  - For security reason Durabuilt Account Managers should not know the Dealer ID and Passwords.
- 2 Account Manager proceeds with CX Base Training [SEE Below] and closes Salesforce Task once training is completed.

**NOTE:**

For DQ 360 Users, IT will uncheck DQ 360 Dealer and DQ 360 User boxes (DQ 360 boxes are hidden in Salesforce) This won't allow any new quotes to be produced or orders uploaded.

Dealer will have access to view DQ 360 quotes. If the Dealer needs to submit the order they need to re-quote in CX and submit.

- If there is a price discrepancy, the Account Manager can submit for additional discount.



### CX BASE TRAINING CHECKLIST

Account Manager is responsible for training the Dealer on the following;

- Dealer setup
- Logging in
- Search Functions
- New Quote
- Required Data & Shipping info
- Entering Notes
- Setting Margins / Markups
- Printing
- Placing the Order
- Check Status



### DASHBOARD

Your Sales Rep Dashboard will keep you on track with Account and User set ups and quotes done by our customers.