Salesforce User Guide

ACME Corp. Ltd.

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1 About this guide

Salesforce is an online solution for customer relationship management. It gives all your departments — including marketing, sales, commerce, and service — a shared view of your customers using a single integrated platform. This document is a user guide for Salesforce for the employees of ACME Corp. Ltd. and is divided into the following chapters:

- Chapter 1, “About this guide” briefly describes this document.
- Chapter 2, “Introduction” gives an overview of the scope and purpose of the guide.
- Chapter 3, “Instructions” explains how to create different types of records in Salesforce.

1.1 Who Should Use It

This guide is intended for the employees of ACME Corp. Ltd. who do not have extensive experience with the Salesforce platform and website. However, it assumes that you have basic knowledge of Salesforce and are able to log into your company-issued account.

1.2 Typographical Conventions

This document uses the following typographical conventions:

- Button, tab, and window names appear in **bold** type in the step-by-step instructions.
- Arrows and other visual aids are used to highlight important options where necessary.

2 Introduction

2.1 Purpose

The purpose of this document is to visually describe the steps for creating various types of records in Salesforce.

2.2 Scope

This document visually shows how to create the following types of records in Salesforce:

- Accounts
- Contacts
- Cases
- Chatter Posts

It is meant to supplement and not replace the official Salesforce documentation. For more detailed information, users should consult the official documentation.

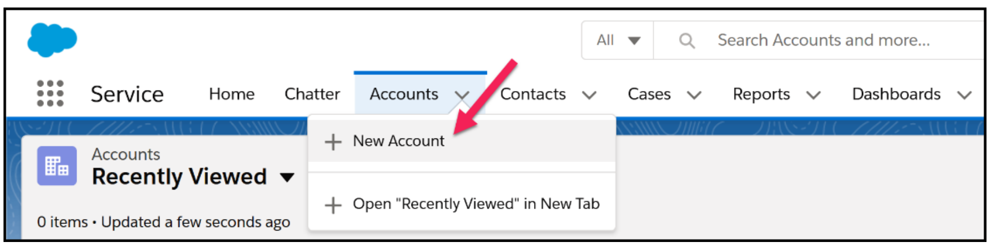
3 Instructions for Creating Records

These instructions assume that you have a company-issued Salesforce account and are able to log in using it.

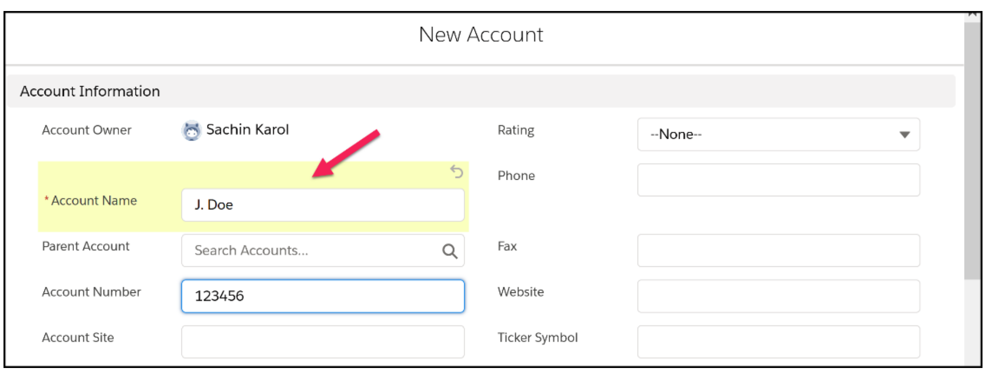
3.1 How To Create an Account

Accounts are used to store information about customers or individuals you do business with. You can create a new account by following the steps described below:

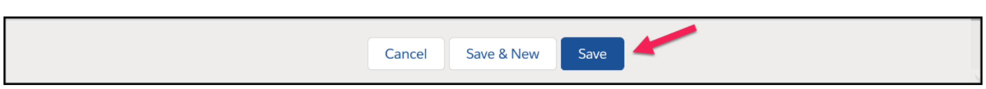
1. Click the **Accounts** tab and select the **+ New Account** option from the dropdown menu.



2. Fill in the required and any additional information in the **New Account** window.

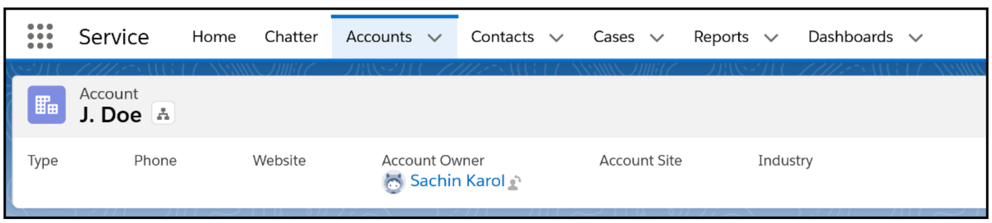


3. Once you have completed the fields, click the **Save** button at the bottom of the window.



4. A small green popup should appear, confirming that the account was created. You can either cancel this popup by clicking the ✕ symbol or wait for it to disappear in a few seconds.

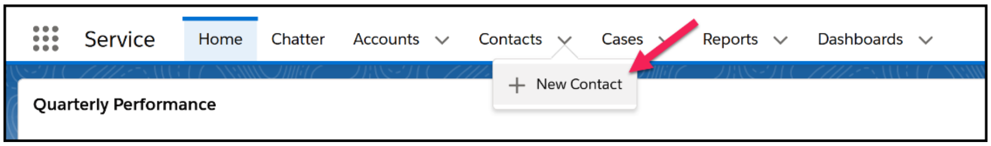
5. You should now be on the page for the account you have just created.



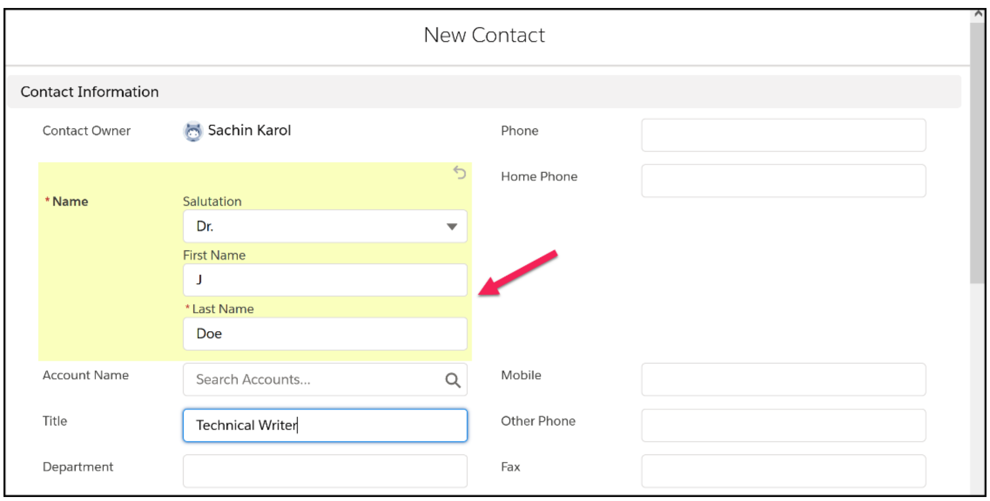
3.2 How To Create a Contact

Contacts are also used to store information about the people you do business with.
You can create a new contact by following the steps described below:

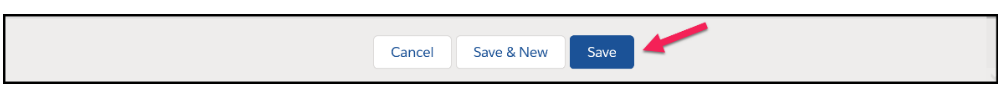
1. Click the **Contacts** tab and select the **+ New Contact** option from the dropdown menu.



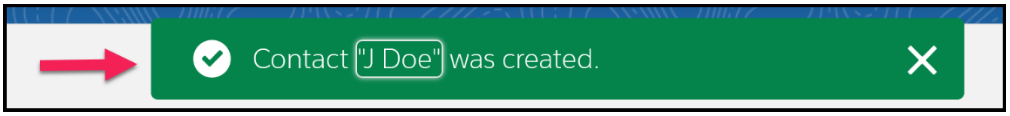
2. Fill in the required and any additional information in the **New Contact** window.



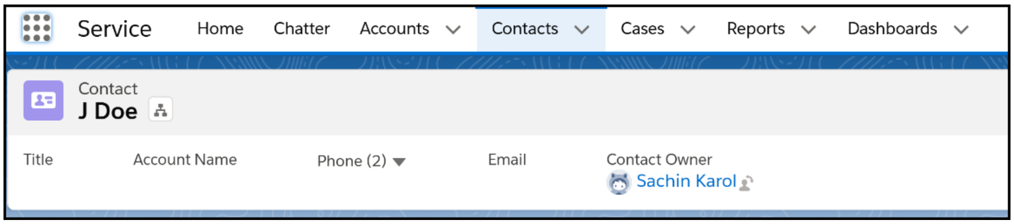
3. Once you have completed the fields, click the **Save** button at the bottom of the window.



4. A small green popup should appear, confirming that the contact was created. You can either cancel this popup by clicking the ✕ symbol or wait for it to disappear in a few seconds.



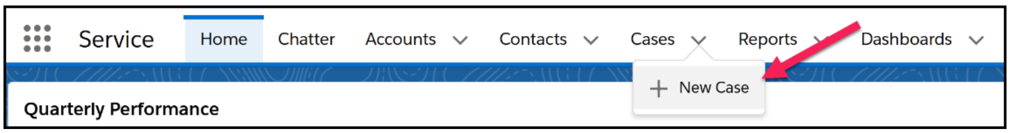
5. You should now be on the page for the contact you have just created.



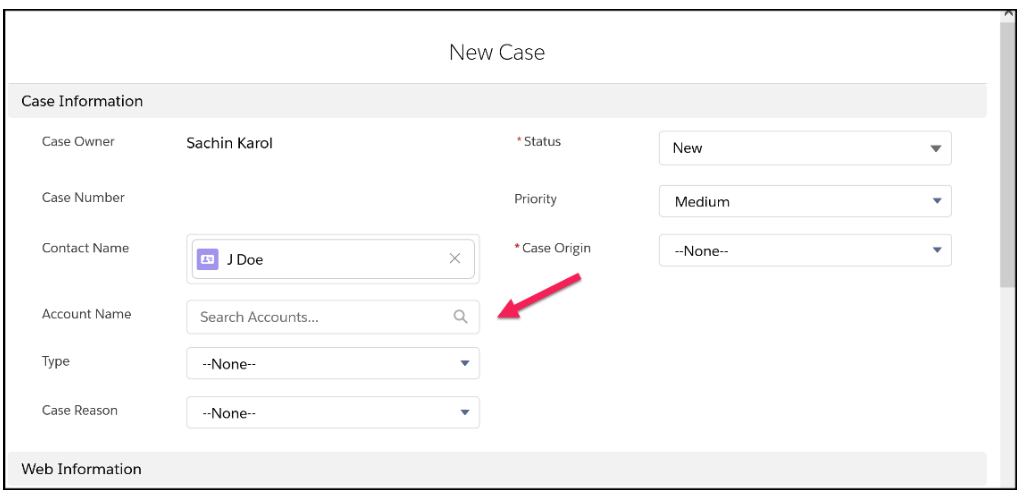
3.3 How To Create a Case

A case is a description of a customer's feedback, problem, or question. Cases can be used to track and solve customer issues. You can create a new case by following the steps described below:

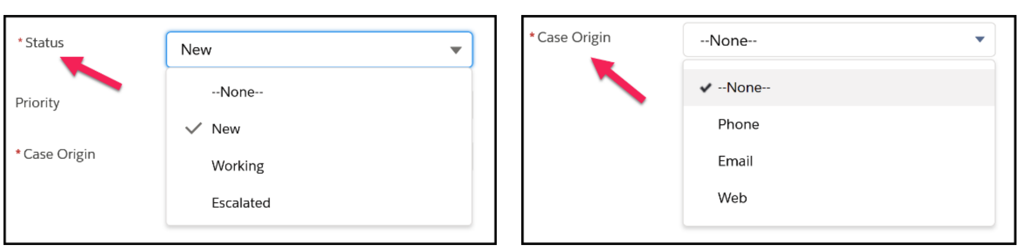
1. Click the **Cases** tab and select the **+ New Case** option from the dropdown menu.



2. Fill in the required and any additional information in the **New Case** window.

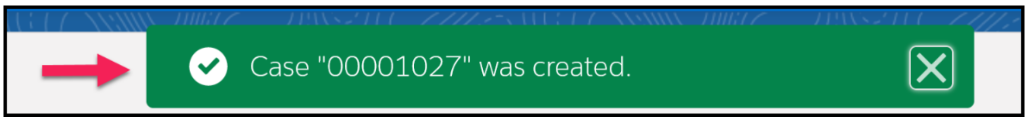


3. Please note that you must fill the **Status** and **Case Origin** fields for each new case you create.

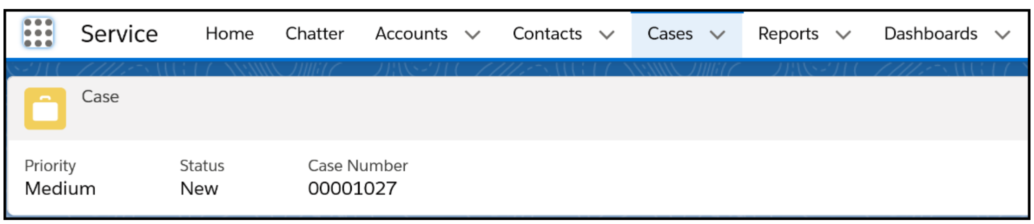


4. Once you have completed the fields, scroll to the bottom of the window. Check the **Send notification email to contact** box if you wish to inform the contact mentioned that a new case has been created. Finally, click the **Save** button, which is on the right.

5. A small green popup should appear, confirming that the case was created. You can either cancel this popup by clicking the ✕ symbol or wait for it to disappear in a few seconds.



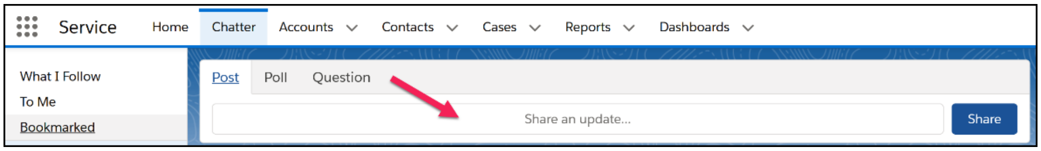
6. You should now be on the page for the case you have just created.



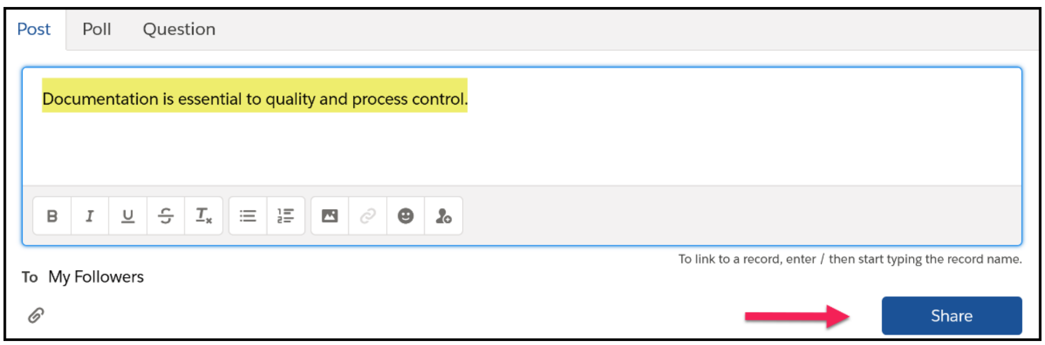
3.4 How to Create a Chatter Post

Salesforce's **Chatter** tool allows users to collaborate by working together and sharing information in real time. You can create a new chatter post by following the steps described below:

1. Click the **Chatter** tab in the menu bar. This will open a window with three tabs (**Post**, **Poll**, **Question**). Ensure that the **Post** tab is selected and click anywhere within the **Share an update** text box.



2. Type your message within the expanded text field (see the highlighted text in the image below for an example). When you have finished typing, click the **Share** button.



3. Your post should become visible for viewing and commenting within a few moments.