Salesforce Dealer Portal Training

Purpose of the Tool

The Salesforce Dealer Portal is a significant improvement on the previous generation of our dealer portal. Marine Travelift has opted to make this investment which will provide all of our dealers with all of the functionality of the world's most popular tool for tracking sales activity. With the cooperation of our dealers, this tool will provide the Marine Travelift Sales & Marketing team the ability to efficiently consolidate all of the activity throughout our worldwide dealer network. We believe that this tool is essential for our company as we continue to seek new ways to stay a step ahead of our competition.

Purpose of Training

The purpose of this training course is to introduce all of our dealers to the new Salesforce Dealer Portal platform. This new tool has all of the functionality of the previous generation of our dealer portal. Dealers can download spec sheets, price lists, marketing materials, bulletins, and other critical files. In addition, the Salesforce Dealer Portal provides the capability to easily enter new sales leads, to convert these leads to opportunities once a quote has been provided, and to update the status of these opportunities as new information is available. Now that this functionality has been provided, the Marine Travelift Sales & Marketing team will require all dealers to maintain their sales leads and opportunities on, at least, a weekly basis. If this tool is used properly, it should become a valuable tool for both our dealers and for the Marine Travelift Sales & Marketing team.

Expectations

It is our expectation that dealers grasp the importance of the new Salesforce Dealer Portal and appreciate of the company's need to have a centralized database for tracking sales opportunities throughout the worldwide dealer network. Marine Travelift will continue our commitment to providing the most up-to-date information available to our dealers in the new Salesforce Dealer Portal (Content and Workspace tabs). We are now extending our expectation to our dealers, who will now be expected to maintain their sales leads and opportunities within the Salesforce Dealer Portal on a very regular basis.

Objectives

1. Introduce the new Salesforce Dealer Portal.
2. Explore the content files (spec sheets, marketing materials, price lists, bulletins, etc). Become proficient in navigating through the files and searching for files through the Content tab in Salesforce.

3. Define a lead and what information needs to be entered when creating a lead.
4. Define an opportunity and walk through the information needed to qualify a lead into an opportunity.
5. Become proficient in navigating through the files and searching for files through the Workspace tab in Salesforce.

System Requirements

In order to access the Salesforce Dealer Portal all you need is a connection to the Internet and your dealership's username/password. A single login will be set up for each dealership. An initial login user name (email address) will be submitted by the main contact of each dealership at the completion of this training program. A system generated password will be sent to each dealership which can be reset on the dealer login page of the website.

Salesforce Dealer Portal: Available Tabs

The Salesforce Dealer Portal is broken up into a series of tabs. Each one of these tabs delivers a unique set of information and functionality. The portal currently consists of the following tabs:

1. Home
2. Content
3. Company Contacts
4. Leads
5. Opportunities
6. Reports
7. Workspaces

In the future, as the Salesforce Dealer Platform continues to be developed, we expect to add additional tabs that will deliver additional functionality to our dealers. We will now demonstrate the features and functionality of each of the tabs currently available.

1. Home Page

The home page contains a message and alerts section, a search function, the latest company press release, and a list of recently viewed items.

2. Content

Rather than keep files in folders that make content difficult to find, Salesforce Content stores files in fully searchable file storehouse. You can view a list of all content that belongs to a particular tag or filter search.

Searching
Searches scan the entire storehouse of documents. You can filter searches by category, featured content, tags, file formats, and workspaces and then view the results with various levels of detail, providing an easy way to find relevant content quickly.

To search for specific content:

1. From the **Search In** drop-down list, restrict your search to a specific workspace or choose to search in all workspaces.
2. Optionally, in the **Filter Your Results** left hand sidebar, filter your search results by category, featured content, tags, file formats, authors, workspaces, or a custom field. The number in parentheses, next to each filter type, shows you how many matching files are in the search results.

Previewing
You do not need to download a large document to determine if its content is relevant to you. The content details page provides document details at a glance, including document title, author, revision date, tags and workspaces. If the document is a Microsoft PowerPoint, Word, Excel, or Adobe® PDF file, you can preview the entire file in your browser without downloading it or download the file for your convenience.

3. Company Contacts

Company Contents are virtually identical to the company contacts list displayed in the previous generation of our dealer portal.

4. Leads

What is a Lead?
A lead is a prospect or potential opportunity before quoting a potential customer. A lead could be a person you met at a conference or trade show who expressed interest in a machine, someone who filled out a form on your company's website for more information or someone you would like to contact to see if they would be interested in a new machine. The Marine Travelift Sales & Marketing team expects all dealers to enter every reasonable lead that they are aware of. (In turn, this will be the method we use to distribute leads to our dealers.)

Lead Detail and Lead Tab Contents

1. *Lead Information*
2. *Interest Information*
3. *Methods of Contact*
4. *Description Information*
5. *Open Activities*

The Open Activities related list displays all open tasks and events for a record and its associated records. For example, if you have a task related to a contact, that task displays in the Open Activities related list of the contact.

- Click **New Task** or **New Event** to create an activity that is associated with the record.
- Click **Edit** to edit an activity.
- Click the subject of an activity to open the detail page of the activity.

6. *Activity History*
   All notes and attachments from the lead are converted and attached to the new account and contact. All open activities and activity history from the lead are converted and attached to the new account, contact, and opportunity.
7. *Lead History*
   The Lead History related list of a lead detail page tracks the changes to the lead. Any time a user modifies any of the standard or custom fields whose history is set to be tracked on the lead, a new entry is added to the Lead History related list. All entries include the date, time, nature of the change, and who made the change.
8. *Notes & Attachments*

Search for Existing Leads

Before entering a new lead, it is vital to check the database to make sure that the same lead or account does not already exist in the system. Salesforce does not automatically check for duplicate leads or accounts.

1. Enter your search terms in the **Search** box located on the left sidebar.
2. Click **Go**. The search returns a list of items that match your search terms.
3. From the list of search results, select a record to jump directly to that record or click **Edit** to edit it.

Salesforce creates a new account and contact, using the information from the lead. If an existing account and contact have the same names as those specified on the lead, you can choose to update the existing account and contact.

Creating a New Lead

From the **Create New** drop-down list on the left sidebar, click **Lead** or click **New** next to **Recent Leads** on the leads home page. Enter the lead information. Click **Save** when you are finished, or click **Save & New** to save the current lead and add another. (Note: When you create a new lead you are automatically assigned as the owner. To change the lead owner, click on the **Change** link next to the lead owner's name on the Lead Detail page.)

All lead fields need to be completely filled in. Without this information, the missing data will cause problems running reports and obtaining accurate information.

5. Opportunities

What is an Opportunity?

Opportunities are the sales and pending deals that have reached a level that makes you want to track them carefully. Marine Travelift differentiates a Lead from an Opportunity based on whether the potential customer has been quoted. If a lead has received a quote….then they become an opportunity. The opportunities tab lets you view and edit detailed information on each opportunity to which you have access.

Converting a Lead to an Opportunity

A lead should be converted into an opportunity when a quote is sent to a potential customer. To convert a lead:

1. From the lead detail page, click **Convert.**
2. **F**ill in the following fields:
    - Lead Information
    - Subject—The subject or short description of the task, for example, "Email quote to customer." You can enter a subject, or select from a pick list of previously defined subjects.
    - Due Date (optional)—Date when the task should be completed. You can enter a date, or choose a date from the calendar that displays when you put your cursor in the field.
    - Comments (optional)—Text note describing the task. This field can hold up to 32KB of data.
    - Status—Current status of task, for example, Not Started or Completed.
    - Priority—Urgency of the task, for example, Low, Medium, or High.
    - Send Notification Email (optional)—Select this checkbox to send a notification about this task to the assignee.
    - Reminder (optional)—Select this checkbox to schedule a reminder for this task.
3. Click **Convert**.
4. If a duplicate contact exists, choose whether to create a new contact or update the existing contact.
5. Click **Convert** to finish. All notes and attachments from the lead are converted and attached to the new account and contact. All open activities and activity history from the lead are converted and attached to the new account, contact, and opportunity. The converted lead record can no longer be viewed, although it does contribute data to reports.

Displaying List of Opportunities

The Opportunities List page displays a list of opportunities in your current view. From this page, you can view detailed opportunity information and access related information.

To find specific opportunities:

1. Enter your search terms in the Search box located in the sidebar.

2. Click **Go**. The search returns a list of items that match your search terms.
3. From the list of search results, select a record to jump directly to that record or click **Edit** to edit it.

Once you have located an opportunity on the Opportunities Home or List pages, click the name to display detailed information. From an account or contact, click the opportunity name in the Opportunities related list to display the opportunity. All opportunities associated with the account or contact, are listed in the Opportunities related list.

Editing Opportunities

To update an opportunity, click **Edit**, and then change the fields that you want to update. When you have finished, click **Save**. You can also select **Save & New** to save the current opportunity and create another one.

Printing Opportunities

To open a printable display of all information for a record, click **Printable View** on the detail page. To return to the last list page you viewed, click **Back to list** at the top of the opportunity detail page.

6. Reports

We have prepared reports for you so that you can view your leads and opportunities by stage, and get a total of each stage by dollar amount. These reports can be run at any time and are always current.

7. Workspaces

The workspace tab is an area that offers some summary views of documents contained in the portal. You may browse here by category (Sales, Service, etc.) rather than use the search engine to find documents, if you prefer.

The workspace tab contains the following sections:

My Workspaces

You are subscribed to each of the workspaces listed on this tab. Any time a document is posted here, you will receive a daily email message notifying you of which documents were added.

Featured Content

This section lists the most recent Monthly Bulletins and their supporting documents.

Top Content

This section includes lists that summarize content activity in your workspace. In the Top Content section you can choose from the following categories:

- Publication Date
- Num Downloads
- Rating
- Num Comments

Popular Tags

This "tag cloud" shows you how the content in your workspace has been labeled. Tags are descriptive terms assigned during upload or revision that help classify and organize content. Click a tag name to view search results containing all the files with that tag. You can choose to sort the tags alphabetically or by popularity.