User Guide Version 2.1.2
July 2020

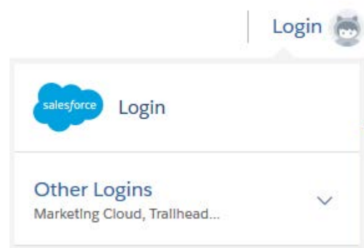
Additional Help is Available at:
www.ProMachSalesforce.com

Logging In

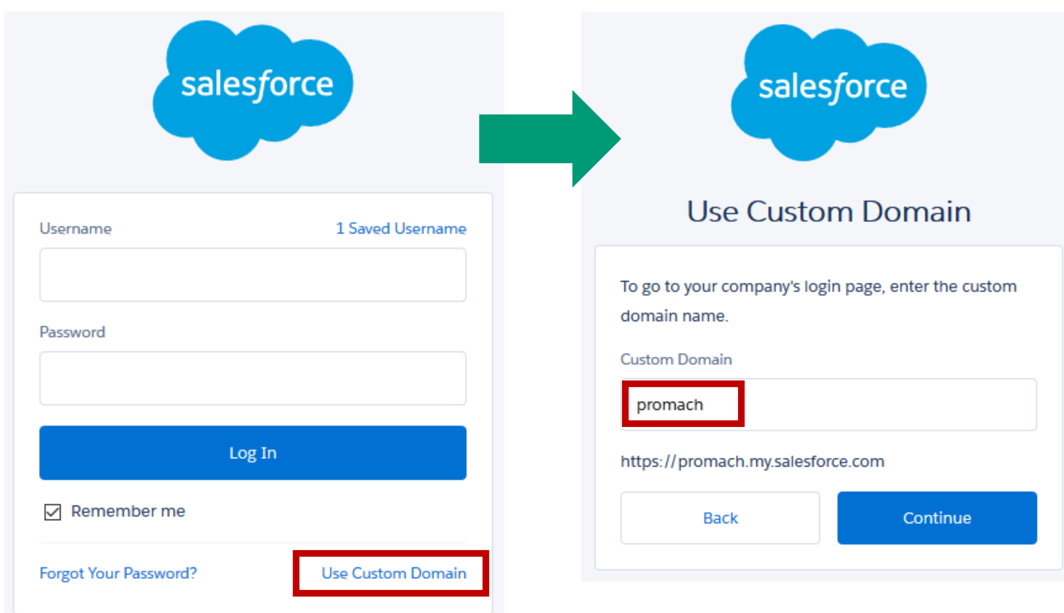
Follow these steps to log in to the various places you will use Salesforce. Note: If you are ever asked to choose an Environment or Connection always choose **Production** (do not choose Sandbox).

In Your Web Browser on Your Computer/Laptop:

- Go to www.Salesforce.com in either Google Chrome or Firefox (the preferred web browsers for Salesforce):
    - If you need Google Chrome download and install it here: https://www.google.com/chrome/
    - If you need Firefox download and install it here: https://www.mozilla.org/firefox



- Click **Login** in the upper right of the screen
- Click the Salesforce Cloud Login icon
- On the main login screen choose **Use Custom Domain** underneath the login button
- Type in **promach** (capitalization doesn't matter) for the Custom Domain and press **Continue**
- If you are logged in to Office365 it should automatically log you in to Salesforce
- Otherwise you may have to enter your username and password for Office365 – this is the same username and password you use to log in to your email in Microsoft Outlook

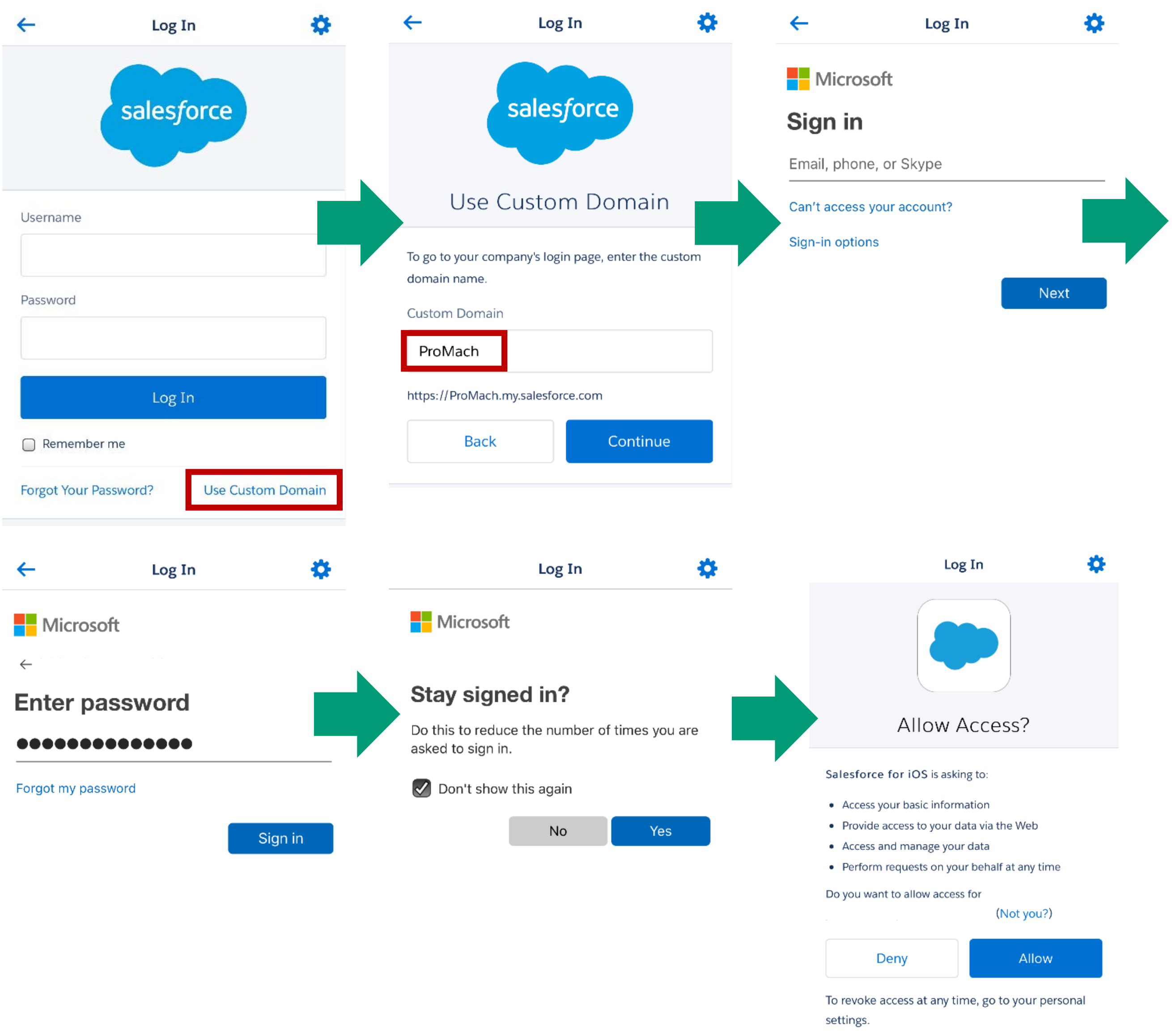


- Once you have logged in once, you can go directly to https://ProMach.My.Salesforce.com and bookmark the site in your web browser for easy access

Logging In

On Your Phone/Tablet:

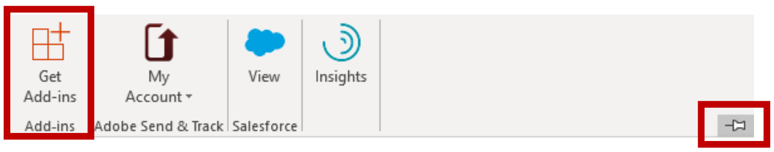
- Download the Salesforce Mobile App from your phone or tablet (Note: Salesforce.com is the author):
    - Apple iOS: https://itunes.apple.com/app/id404249815?mt=8
    - Google Android: https://play.google.com/store/apps/details?id=com.salesforce.chatter
- Open the Salesforce App
- Follow the same general login instructions from the **In Your Web Browser on Your Computer/Laptop** section, clicking **Use Custom Domain** underneath the login button and typing in **promach** for the custom domain
- Make sure to select **Yes** when it asks you to **Stay Signed In**
- Make sure to click **Allow** when it asks you to **Allow Access?**



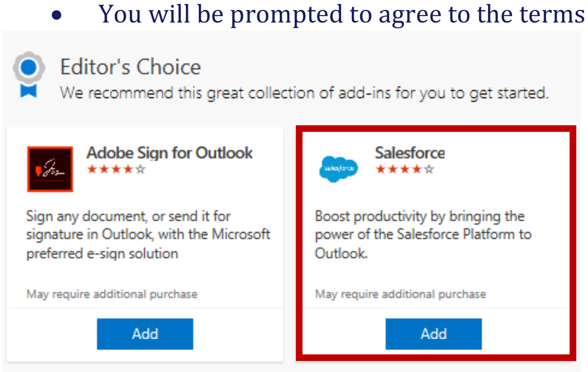
Logging In

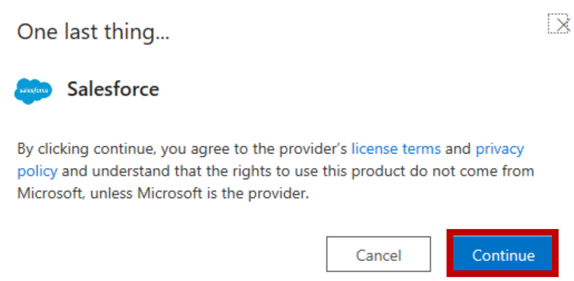
Through the Salesforce Add-in for Outlook on Your Computer/Laptop:

- From your Outlook Desktop Application on your computer/laptop click on the Home link to show your ribbon – you will want to make sure this ribbon is pinned for easiest access of Salesforce, clicking the pin in the low right of the bar so it always stays visible
- Click on the Get Add-ins link

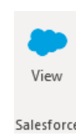


- Select the Salesforce add-in and click **Add**, which should be among the first shown. Alternatively, you can search for it in the **Search add-ins** box
- You will be prompted to agree to the terms and privacy policy – simply click **Continue**

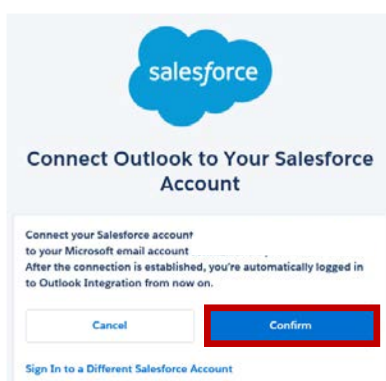




- You may have to wait briefly or restart Outlook, but you should soon see the Salesforce add-in on your Home ribbon – it is the blue Salesforce Cloud icon with the word **View** under it
- Clicking the Salesforce icon while viewing email (it is recommended you have your Reading Pane turned on) or events will open a Salesforce panel within the email or event in Outlook for you to perform Salesforce related tasks



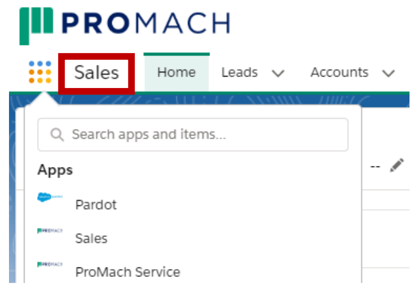
- You can login to Salesforce following the same general instructions from the **In Your Web Browser on Your Computer/Laptop** section. You will be prompted to Connect Outlook to Your Salesforce Account – simply click **Confirm** and you will be up and running



General

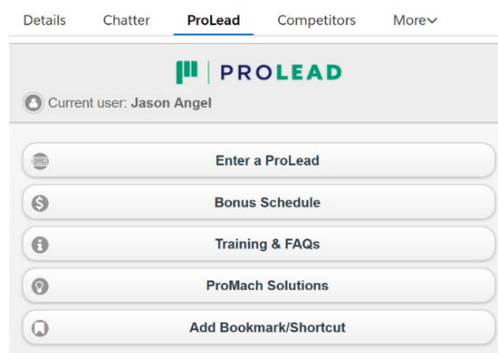
A few general notes about Salesforce are highlighted below. These are standard items that are available throughout Salesforce.

Sales App



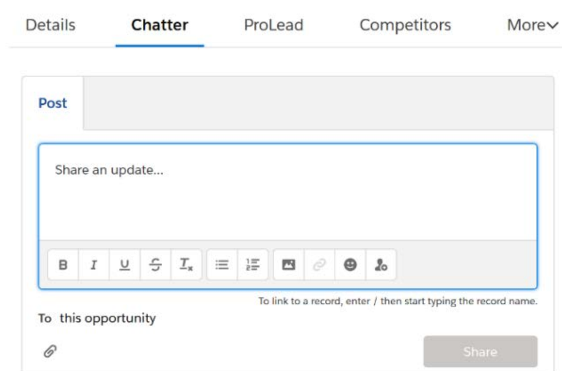
Unless you are in marketing or aftermarket, when you are logged in to Salesforce make sure you are in the **Sales** app – you should see the word **Sales** underneath the ProMach logo next to the dots and the Home tab. If you are not in the Sales app click on the dots and choose **Sales** under the Apps. **This user manual focuses only on the Sales app.**

ProLead



ProLead is embedded throughout the Salesforce application on individual records/pages for Leads, Accounts, Account Profiles, Contacts, and Opportunities. ProLead works the exact same way it does outside of Salesforce, it is just embedded directly into Salesforce so you never have to leave the Salesforce application to use it. It is not currently connected to the data within Salesforce, so you will have to identify yourself and walk through a ProLead as you normally would. In future updates to ProLead we intend to better connect it with Salesforce for a more seamless experience.

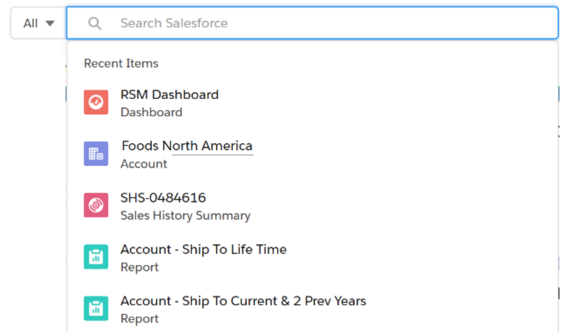
Chatter



Salesforce Chatter is an enterprise collaboration solution, giving you a private social network to connect you to fellow ProMach employees to collaborate together on opportunities, prospect around new customers, make people aware of new information, and more. It is available within individual records/pages for Leads, Accounts, Account Profiles, Contacts, and Opportunities. Chatter records conversations and posts, similar to the way social networks (such as Facebook) archive your posts and comments. The Chatter tab also records the history of changes to the record/page you are on for a full historical record of what's going on with that record. To mention someone in Chatter and for them to receive a notification you will need to use the @ in front of their name for each post you send them. Chatter can replace emailing people in certain instances, keeping appropriate information related to a specific record in Salesforce.

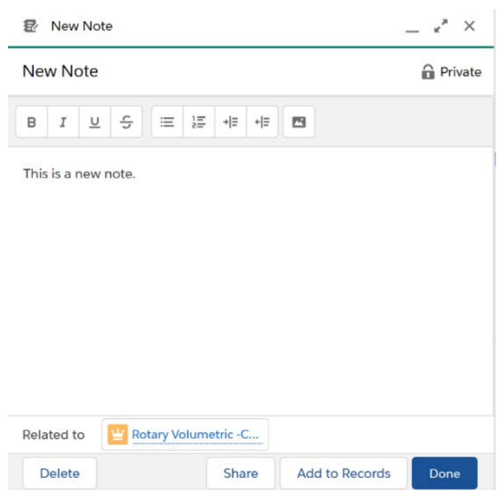
General

Global Search



From any page in Salesforce you can access the global search box at the very top of your screen. By default clicking in the search box will pull up your 5 most recent items. Typing into the search box will pull up autosuggestions you can quickly click on. Typing a full search and pressing enter will pull up a search results page with a mix of results across Accounts, Account Profiles, Leads, Opportunities, and more. Selecting the All button next to the search box will let you narrow your search down to particular objects in Salesforce, such as Accounts or Opportunities, to name a few.

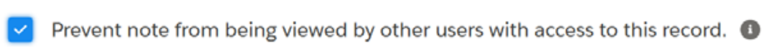
Notes



Salesforce Notes are a good way to keep private information private. Think of Notes as a scratchpad for jotting down things that you don't want to make a record of in your Activities or Details. Very personal information about a contact, working notes around a phone chat, or other private information is a good candidate for Notes. As a best practice create the Note within the page/record you want it related to so it always stays with the appropriate record.

One Caveat – Notes cannot be reported on in Salesforce so it is recommended you use them sparingly. Activity is generally the right place to capture information, since it can be reported on within the system.

Notes by default are visible to anyone who can see the page/record you are on, so to make a note private simply click the **Add to Records** button and check the box to **Prevent note from being viewed by other users with access to this record**:



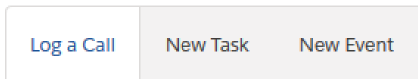
Issues?

- **Logging In** – If you are having issues logging in to Salesforce, you will need to check with your local IT resource – Salesforce uses the same login credentials as our Office365 system.
- **Bug Reports** – If you are finding errors, glitches, or bugs in the Salesforce software (e.g. something is not working the way you think it should, something is giving you an error message, etc.) please reach out to your Division CRM Lead – when doing so please send a link to the page with the bug, the text of the error message, and a screen shot if possible.
- **Feature Requests** – If you are wanting a feature that is not currently in Salesforce, please reach out to your Division CRM Lead with the request. They will help prioritize and communicate the request to the Salesforce Administrator.

Activity

One of the main benefits of Salesforce is not letting things slip through the cracks. Activity is the way to make sure you stay on top of things by logging calls/meetings/emails/etc., creating tasks, and creating events.

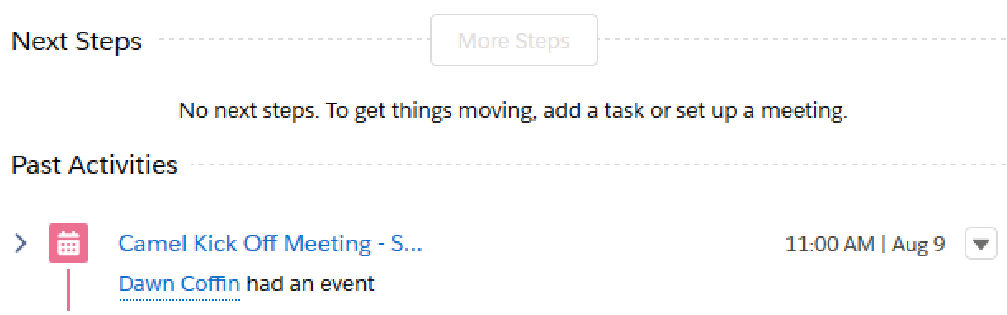
The activity box is on almost every page of Salesforce except the home page. At a high level there are 3 basic things to do in the Activity box – Log a Call, Create a New Task, and Create a New Event.



- **Log A Call** – If you have an in-person meeting, an email exchange, a phone call, or anything else you want to "log" then Log a Call is your key. You can enter your notes and when your click **Save** it will immediately identify it as a Past Activity.
- **New Task** – If you have a to-do item then you'll want to create a new task with it. You can set a due date and it will show up in your tasks and will become overdue until you mark it as complete. You can create a task for yourself or for others. Once you mark it as complete it will show up as a Past Activity.
- **New Event** – If you have a time-based meeting, call, or something else that must happen at a certain date and time then you'll want to create a new event. As soon as the event passes it will immediately move to a Past Activity. For best use of events create the event in your Outlook calendar and sync it with Salesforce through the Salesforce Add-in for Outlook.

For best success use Activities within the "Object" you are working with – these include Leads, Account Profiles, and Opportunities, to name a few. Doing this will relate the Activity to the appropriate records and make sure it is connected to the specific thing you are working on.

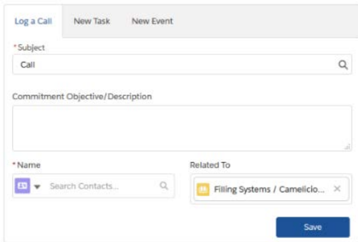
Activities can be reported on within Salesforce, so they are the best place to capture your information for creating reports and dashboards. Past Activities and Next Steps will be shown below each of the boxes you enter calls, tasks, and events in, as shown below:



Some tips and tricks for best use of each of the activities are shown on the next page.

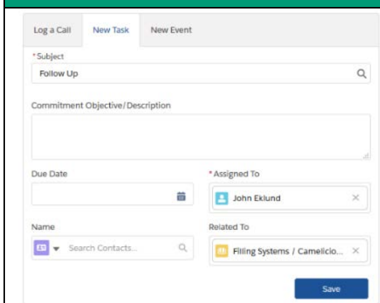
Activity

Log a Call



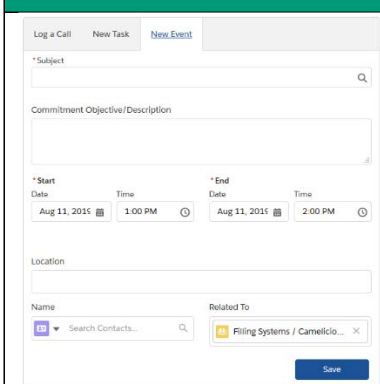
- The Subject field will suggest a few things (Call, Email, Meeting, Send Letter/Quote, Other) – you can choose one of these or overwrite it with whatever text you want
- You must identify a contact in the "Name" filed since these are direct connections you have made with individual contacts – you can select multiple contacts if needed
- Calls can be related to Account Profiles, Leads, or Opportunities and this is prefilled based on the page you are on when you log the call
- **Note:** We **do not** recommend Relating a Call or Email to Contacts as these are shared and visible across all product brands and anyone will be able to see your activity. We strongly recommend logging calls only to Account Profiles, Leads, and Opportunities.

New Task



- The Subject field will suggest a few things (Call, Send Letter, Send Quote, Other) – you can choose one of these or overwrite it with whatever text you want
- The Commitment Objective/Description should help you focus on the goal of the Task for best success
- A Due Date should be used to make sure the Task shows up and reminds you at the appropriate time (and becomes overdue if you miss it)
- By default, a Task is assigned to you, but it can be assigned to someone else if need be in the **Assigned To** field
- Tasks do not need to be identified with a contact like a call, but contacts can be selected if needed
- Tasks can be related to Account Profiles, Leads, or Opportunities and this is prefilled based on the page you are on when you create the task

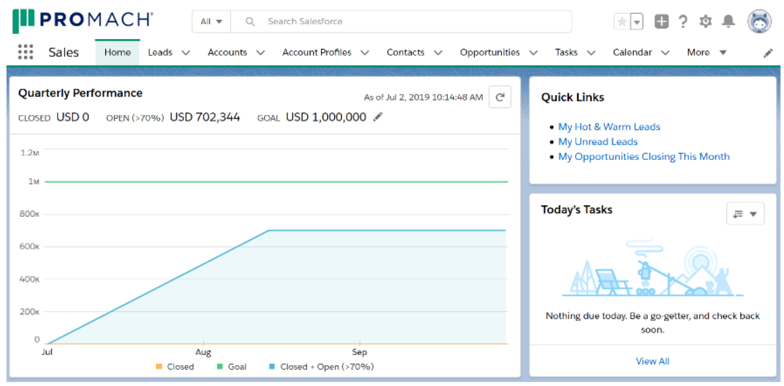
New Event



- The Subject field will suggest a few things (Call, Email, Meeting, Send Letter/Quote, Other) – you can choose one of these or overwrite it with whatever text you want
- The Commitment Objective/Description should help you focus on the goal of the Event for best success
- For an Event you must choose a start date and time and an end date and time
- You can specify a location, if relevant, for the Event
- Events do not need to be related to a contact like a call, but contacts can be selected if needed
- Events can be related to Account Profiles, Opportunities, etc. and will be prefilled based on the page you are on when you create the task

Home Page

The Home Page is your main landing page when you log into Salesforce – it shows you a myriad of data all on one page, making it easy to skim what is going on in your world and quickly take action on the things most important to you. Included on the home page are:

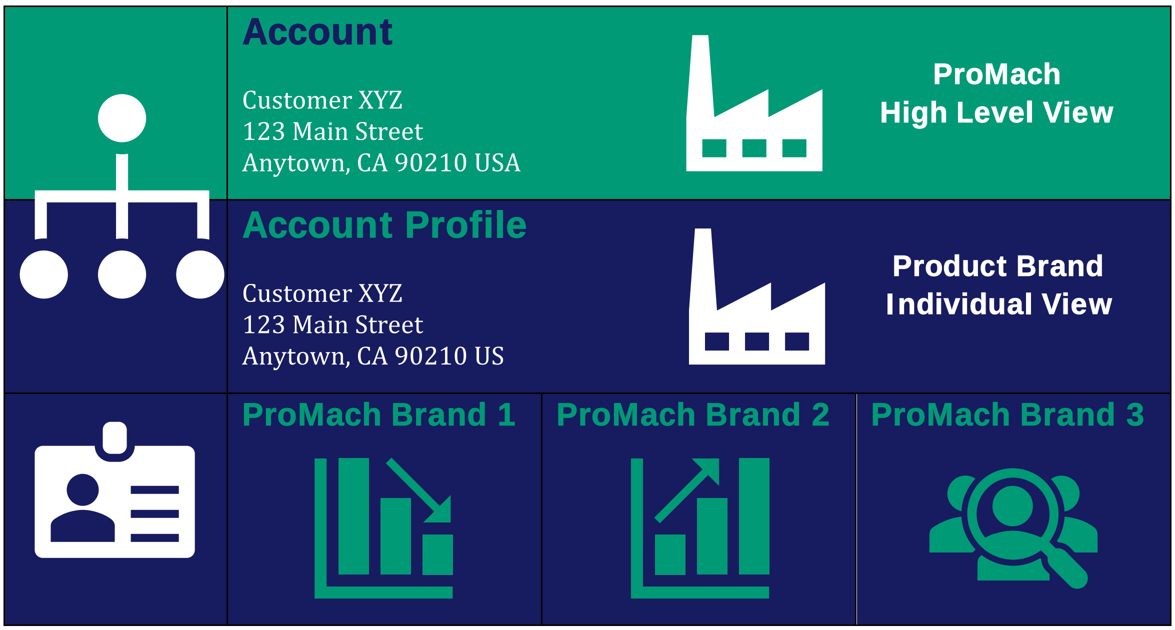


- **Dashboards** – Each home page contains a customizable dashboard (to update it please reach out to your Division CRM Lead) with a view into various reports such as:
  - Opportunities Closed Won YTD
  - Hot & Warm Leads
  - Opportunities Closing This Month
  - 30/60/90 Day Pipeline
  - Opportunities by Stage
  - Top Accounts
  - More...
- **Account News** – News relevant to the latest Accounts you were most recently active within
- **Quick Links** – Shortcuts to common links, including:
  - Hot & Warm Leads
  - Unread Leads
  - Opportunities Closing This Month
- **Tasks** – Your Tasks with various view options:
  - Today's Tasks
  - My Tasks
  - All Overdue Tasks
  - Tasks Completed within the Last 7 Days
  - Delegated Tasks
- **Today's Events** – Anything you have synced up on your calendar for today
- **Recent Records** – The last five records you have viewed within Salesforce
- **Assistant** – The Salesforce Assistant aims to improve Tasks by bringing the most important open actions right onto the home screen (up to 10 at a time). This includes:
  - Leads assigned to you today
  - Opportunities with overdue tasks
  - Opportunities with no activity in 30 days
  - Opportunities with no open activity
  - Overdue opportunities

Accounts

ProMach's Salesforce environment includes both Accounts and Account Profiles. The difference between these two are subtle, but very important.

- An **Account** is **ProMach's overall view of an individual, physical facility/location** (customer, agent, distributor, partner, competitor, etc.). If an Account has multiple locations, there will be multiple Accounts for it (one for each location).
- An **Account Profile** is a ProMach **Product Brand's profile** of a ProMach Account (the same individual, physical facility/location as an Account), which contains information specific to each ProMach product brand to fit their unique view of an Account.

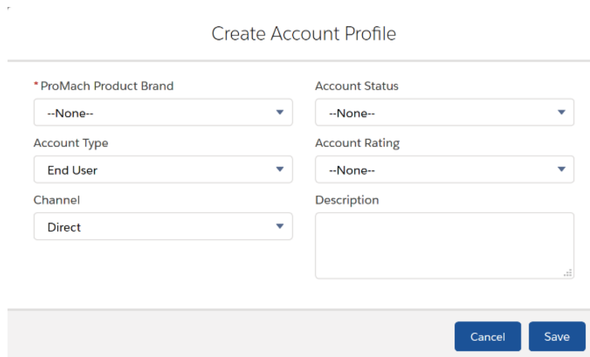


Account Notes:

- The Account is the ProMach view. It is shared across all brands and is the hub for information.
- Accounts are shared across all product brands and display high level information, including the website, address, phone, industry and DUNS information. It is a hub to find all the information related to an Account, including Account Profiles, News, Chatter, Sales History, and more.
- **Accounts are owned by ProMach Corporate since they are shared.** Once a DUNS Number is populated from a nightly job, the Account locks down to prevent users from editing it. If you find something incorrect or that needs updated on an Account, you can send an email to the ProMach Service Desk from within Salesforce by clicking on the **Help Us Update It** tab.
- Account Profiles are created from the Account page by clicking the Create Account Profile button in the upper right of the screen next to the Account name

Account Profiles

As a reminder, an Account Profile is a ProMach product brand's profile of a ProMach account, which contains information specific to each ProMach product brand to fit their unique view of that Account. When you are not working on Opportunities or Leads, you will likely spend most of your time in Account Profiles.



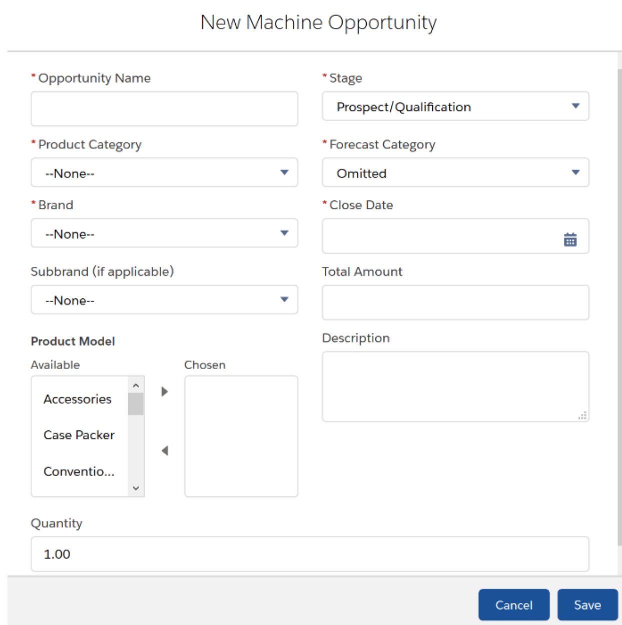
- Look for an Account Profile within the Account you are interested in. If none exists, then you will need to create one by pressing the **Create Account Profile** button at the top of an Account page. A new window will pop up asking for some information. Select your Product Brand, the Account Type and Channel (which will usually be End User and Direct), and an Account Status and Rating, if relevant.
- An Account Profile is the best place to create an Opportunity as it will pull over the information from the Account Profile and you won't have to re-enter this information in the New Opportunity. Simply click the **New Machine Opportunity** or **New Aftermarket Opportunity** (for aftermarket opportunities over $10,000) button to get started:

Account Profile Notes:

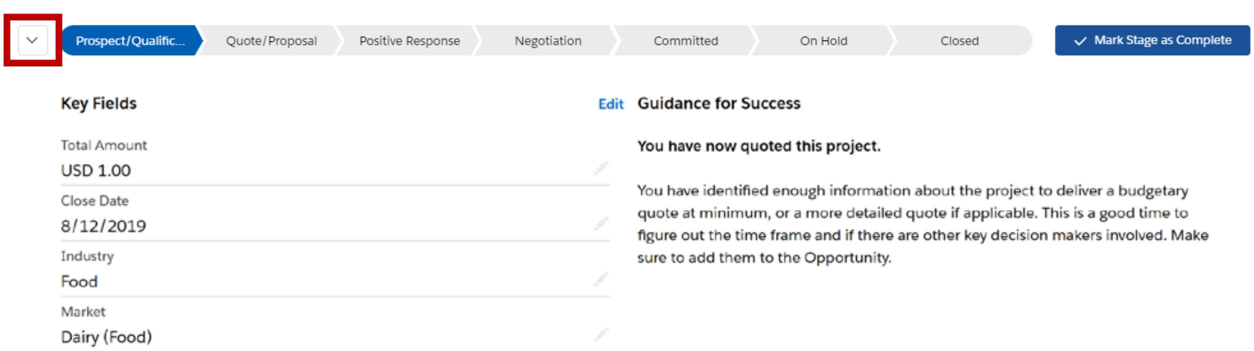
- An Account Profile is a product brand view of an Account. It should be used to capture specific information that is relevant to your brand(s).
- **Account Profiles are owned by a single individual at each product brand.**
- If you haven't done business with or don't have an Opportunity with an Account you likely will not have an Account Profile for the Account and will need to create one.
- You can create an Account Profile for an Account whether you're doing business with them or not. Simply select an Account Rating of **Prospect** when creating the Account Profile.
- Users can see all Account Profiles but can only edit the Profile for their product brand. This can be a great resource to find out more information about an Account, such as who owns an Account Profile.
- Account Planning and Account Hierarchies are supporting objects that allow users to capture more information about an Account.
- **Contacts are shared and Contacts are owned by ProMach Corporate since they are shared.** You will have access to view every Contact at every Account. However, this does not mean you should be cold calling on these shared Contacts. Figure out who has a relationship with the Contact within ProMach and ask for a warm introduction.
- To note which Contacts you are working with and that relationship status, use **Rated Contacts** from within the Account Profile. Marketing can use this to target your rated Contacts.
- When you want to create an Opportunity, start at the Account Profile.

Opportunities

Opportunities are deals and projects that are in progress. They are core to Salesforce and the key to generating revenue.



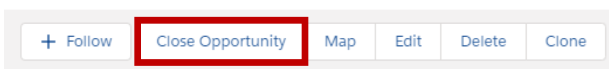
- The best way to create an Opportunity is from an Account Profile – doing so will prefill much of the information you need and help streamline the process for you. Simply click the **New Machine Opportunity** or **New Aftermarket Opportunity** (for aftermarket opportunities over $10,000) button to get started from the Account Profile you want the Opportunity created for – you will get a popup (modal) window asking you a few key items about the Opportunity. When you click **Save** you will have a new opportunity created.
- The most basic element of an Opportunity is the Opportunity Stage – shown below on what Salesforce calls the Chevron. These stages are the key to progressing the Opportunity towards completion. Updating the stages will automatically adjust your Forecast Category and Probability – these can both be overwritten however, if needed.
- By default, new Opportunities will begin at the Prospect/Qualification stage, unless overwritten when creating a new Opportunity.
- As you move through the Opportunity stages you will be given Path information with key fields and guidance for success to help you along your journey – this will make updating the Opportunity easier and allow you to quickly move Opportunities along the buying cycle. If you do not see the path information, click on the dropdown arrow next to the Chevron:



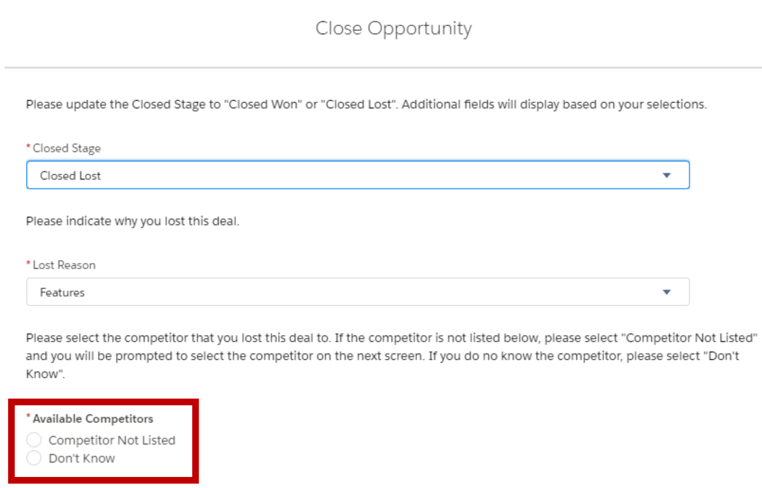
- In general, you should create Opportunities for the end user (customer) that will receive the product or service, if the end user is known. You can specify channel partners such as agents or distributors that are involved through the Channel Account and Channel Contact fields on an Opportunity.

Opportunities

- As you work on Opportunities you will want to include key information about the Opportunity. Three key areas include Competitors, Contact Roles, and Opportunity Team – these are tabs on the Opportunity itself.
  - **Competitors** – Click this tab and Click the **New** button to add your known competitors to your Opportunity. If you wind up not winning the Opportunity and must mark it as Closed Lost, revisit this tab and check the **Lost Opportunity to this Competitor** box if you know who won the business so we can track lost sales to Competitors.
  - **Contact Roles** – Click this tab and add Contacts at your customer, channel partner, OEM, etc. to the Opportunity. Simply click the **Add Contact Roles** button to get started – you will be asked to search for existing contacts and then you will be asked to specify a role for each as well as select a Primary Contact.
  - **Opportunity Team** – Click this tab to add ProMach team members from inside and outside of your product brand to the Opportunity. By default people within your product brand can see your Opportunities, but those outside of your product brand cannot. Click the **Add Opportunity Team Members** button to get started selecting people to join the Opportunity. You will be asked about their Role within their product brand, their name, and what type of access to grant them (Read Only or Read and Write).
- You will be able to specify unique Bill To and Ship To information for each Opportunity – by default these fields will be populated with information from the Account Profile and Account, but you can overwrite the information if you know it will be billed or shipped differently.
- To close an opportunity, use the **Close Opportunity** button rather than the Closed stage on the Chevron. This will pop up a window that will walk you through the process of closing an opportunity.



- The Close Opportunity popup will prompt you to select Closed Won or Closed Lost and ask for a reason from a dropdown menu. Marking an opportunity as Closed Lost will also ask for competitor information so your product brand can do more reporting on the Closed Lost Opportunities to drive product development initiatives and further enhance your selling process. Selecting **Competitor Not Listed** will let you enter Competitor information on the next screen.



Opportunities

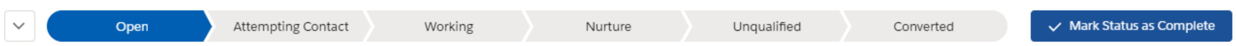
Opportunity Notes:

- Opportunities are created from Lead Conversions or Account Profiles. If you have an existing relationship with the Account, start at the Account Profile.
- Opportunities leverage 3 fields to track an Opportunity's status: Stage, Forecast Category and Probability. Stage will drive the Forecast Category and Probability but both fields can be overridden by a user.
- Forecast Categories are standard across all of ProMach and include fields such as Hot List.
- Opportunities are shared within a brand. If you need to open access, you can leverage **Opportunity Teams**. If you need to make the Opportunity hidden within your brand, you can leverage the **Private** checkbox. This will hide it from your colleagues at your product brand, but your manager will still be able to see it.
- You may place an Opportunity **On Hold** if the Opportunity will not be progressing for a specific period of time and for a specific reason. For example, a customer will not be purchasing until next quarter or next year. When placing an Opportunity on Hold the Close Date should always be updated to an estimated closed date in the future so the Opportunity does not become past due. If there is not a specific time period or a specific reason, the Opportunity should be made Closed Lost.
- When you close your Opportunity with the **Close Opportunity** button it will prompt you to specify if it is Closed Won or Closed Lost. Selecting either will ask you to select a standard reason from the appropriate dropdown box. Selecting Closed Lost will also prompt you for competitor information – you should fill this out if you have it available.
- Do not let Opportunities become past due. This will be monitored to ensure the pipeline is accurate.
- Track all your Activities regarding an Opportunity. This allows users to have visibility into what is happening and what Next Steps are on the Opportunity. Updating Opportunity Detail fields, creating Notes, and Creating Opportunities do not replace logging Activities around an Opportunity!

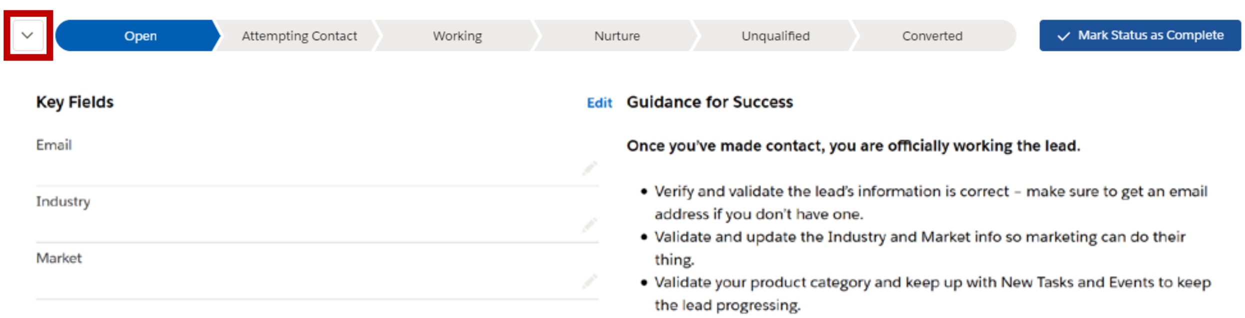
Leads

Leads in Salesforce are people who are interested in your product or service. Converting Leads to Customers will provide revenue and EBITDA to your product brand. By managing your leads in a systematic and structured way, you can increase both the numbers of leads you generate and how many leads you convert.

- Like Opportunities, the most basic element of a Lead is the Lead Stage – shown below on what Salesforce calls the Chevron. These stages are the key to progressing a Lead towards Conversion.
- Depending on Lead Assignment Rules, an imported/uploaded Lead will be assigned to either a specific person or a queue that will get assigned to a specific person. This varies by product brand.
- By default, new leads will enter Salesforce with a status of Open.



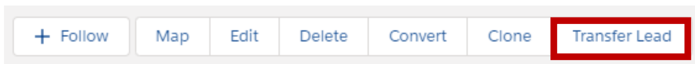
- Your first step should always be to reach out to the Lead. So, be sure to update the Status to **Attempting Contact** and log an activity to show that you are reaching out to the Lead.
- Leads can be moved to **Unqualified** if they are not a good fit for your product brand (you will be asked to select a specific reason if you do unqualify a lead).
- As you move through the Lead stages you will be given Path information with key fields and guidance for success to help you along your journey – this will make updating the Lead easier and allow you to quickly move Leads along the prospecting cycle. If you do not see the path information, click on the dropdown arrow next to the Chevron:

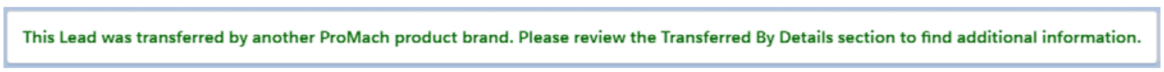


- Certain fields will be required as you move the Lead closer to Conversion. Once you select the lead status of **Working** you will be prompted for the following information about the Lead to help you better understand the Lead and help marketing better target relevant content to the Lead:
    - Email Address
    - Industry
    - Market
- If a Lead becomes cold, but may still have future potential, you can move them to the **Nurture** stage, which will signal your marketing team to help keep them warm with engaging content.
- Once you convert a Lead, you will turn it into an Account, a Contact, and an Opportunity (optionally). Always search to see if there is an existing Account or Contact already created as a best practice.
- You can create Leads – just click on the Leads tab and then click the **New** button. You will be asked for some basic information about the Lead. Leads can also be created from emails you receive in Outlook with the Salesforce Add-in for Outlook.

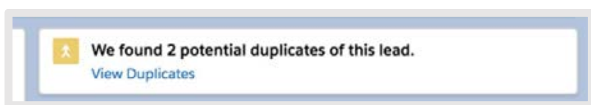
Leads

- If a lead is a better fit for another product brand you can enter a ProLead for them and then select the **Transfer Lead** button to send the Lead and your information about the Lead over to the other ProMach product brand. Once the lead is transferred you will no longer have access to the lead. The product brand receiving the lead will see a message indicating the lead was transferred to them.





- Leads may be associated to Marketing Campaigns – this is Salesforce's way of tracking marketing initiatives. We can use these to track how many Leads and Contacts started in a Campaign (or multiple campaigns), engaged with these Campaigns, and converted into sales from these Campaigns.
- We can track Campaign success by looking at the number of Campaign members, Lead conversion rates and Opportunity attribution. Your marketing team will coordinate these for you.
- Be aware of duplicate records! Salesforce can have duplicate Leads across brands to allow users to work their own Leads. However, if a Lead is a duplicate within your brand or is a duplicate of an existing Contact, you will see the following message. Clicking on it will show you if it is a duplicate Lead or a duplicate with a Contact. If a Contact exists you do not need to stop working on the Lead, it's just good information to know that we also have a Contact created for that Lead. When you convert the Lead you can associate it to the existing Contact.



Leads Notes:

- The Lead object is a 'bucket' used for determining what is junk and what is not.
- Leads can be created manually, uploaded from lists, or imported directly from forms on our web sites (in a future phase of Salesforce).
- A Lead becomes an Account, Account Profile, Contact, and Opportunity (optionally) upon conversion.
- If a Lead is converted to an Account (either new or existing) that does not have an existing Account Profile for your product brand, an Account Profile will automatically be created for your brand.
- As a best practice, we want to create Opportunities off Leads. This allows us to continue tracking the progress of a Lead and ensures it does not get lost as a Contact.
- We do not share Leads or track duplicates across brands, but we do share Contacts. So, check for duplicates. This can give you great, shared information.
- Don't forget to log your calls, emails, meetings and notes with your Leads. This information will follow the Lead after it gets converted.
- Before unqualifying a Lead, consider if it would be a good fit for another brand. If so, pass the Lead along by entering a ProLead and transferring it to another brand, if relevant.
- A ProLead can be created from within a particular Lead record, as well as in any record in Salesforce.
- Always log tasks, events, and calls on the Lead record. Do not try to navigate to the Task tab to do this.

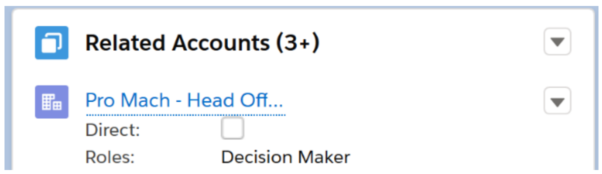
Contacts

Contacts in Salesforce are individuals whom we have specific data about in the system. This may include addresses, phone numbers, email, Accounts they are related to, and more.

- As a rule of thumb, the best place to manage contacts is within Account Profiles – from there you can Rate Contacts within a particular Account Profile to be more meaningful to you.

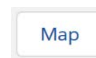
Contact Notes:

- **Contacts are shared and Contacts are owned by ProMach Corporate since they are shared.** You will have access to view every Contact at every Account. However, this does not mean you should be cold calling on these shared Contacts. Figure out who has a relationship with the Contact within ProMach and ask for a warm introduction.
- From a Contact page you can see:
  - Details about the Contact
  - Accounts the contact is related to in the Related Accounts box
  - Opportunities the contact is related to in the Opportunities tab (if you have permission to see the Opportunity)
  - Contact Ratings for Account Profiles where the Contact has been rated (including who created the Contact Rating)
  - Potential duplicate notifications for a particular contact
  - Much more



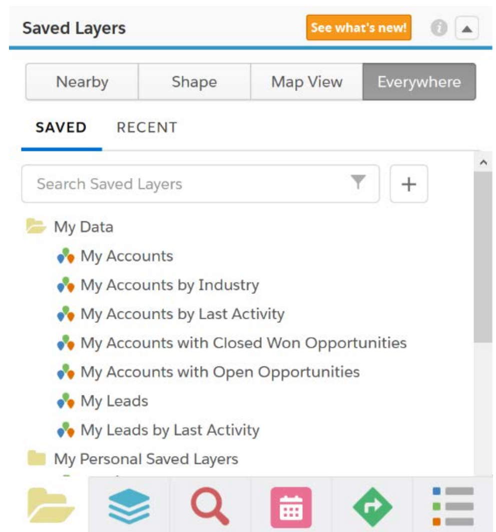
GeoPointe

GeoPointe is our mapping software that is built directly into Salesforce. If you have a license for GeoPointe (not all users have a GeoPointe license) you can access it in one of five primary ways:



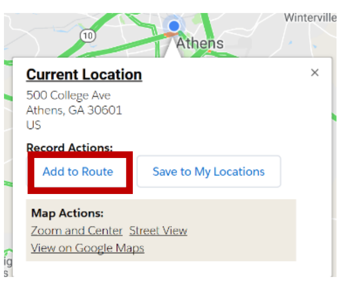
- Click on the **Map** tab on the top of the main navigation
- From within an Account click on the **Map** button at the top right of the screen
- From within an Account Profile click on the **Map** button at the top right of the screen
- From within an Opportunity click on the **Map** button at the top right of the screen
- From within a Lead click on the **Map** button at the top right of the screen
- Alternatively, you can Map Contacts, but you will need to make sure that the Contact contains address information to ensure you can map them correctly

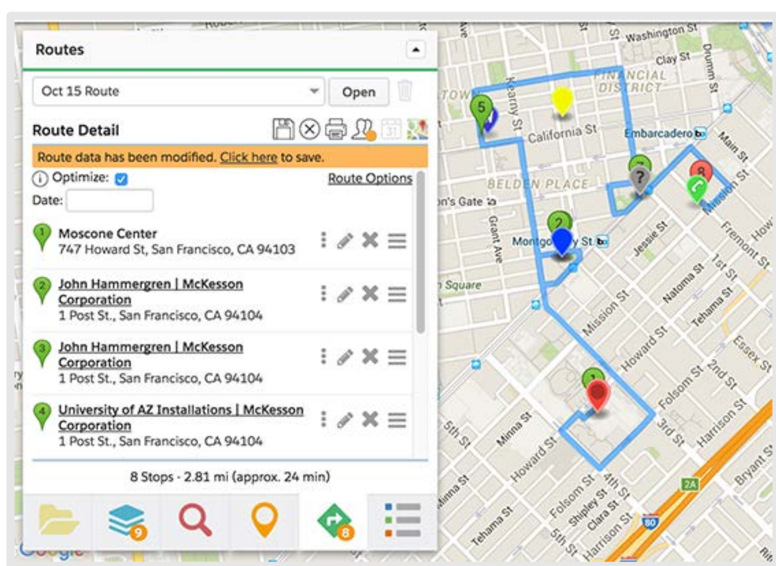
GeoPointe is a powerful mapping tool that combines Google Maps with data from ProMach's Salesforce environment. It is useful for mapping your Accounts and Accounts by Industry, your specific Open and Closed Won Opportunities, your Leads, ProMach Accounts and Account by Industry, and much more. It is useful for prospecting, creating call/route plans, jumping directly into Accounts, etc. To see this information, you will use the GeoPointe panel when you are viewing the Map.



You can search everywhere on the Map, within just the view you have on the screen, by shape, or around things nearby to you.

To create a route, click on a pin on the Map and then click the **Add to Route** button.





Reports & Dashboards

Reports and dashboards are fundamental pieces of Salesforce that help you see what is going on with Leads, Opportunities, Accounts, and more.

- **Reports** are a list of Salesforce data generated based on criteria defined. Think of reports as the types of things you would do in Excel – a report contains data in an organized tabular or graphical format prepared for a certain time period.
- **Dashboards** are a visual representation of data generated by reports, which can be laid out in a pictorial format to create a view of many reports on a single page.

If you need help creating new reports or laying out dashboards, please contact your Division CRM Lead.