

## ***CDC Salesforce -Partner Portal User Guide***

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**Intended Audience:** This document is intended for **CDC Partner Users** with details about creating an account, opportunity and a quote on the opportunity.

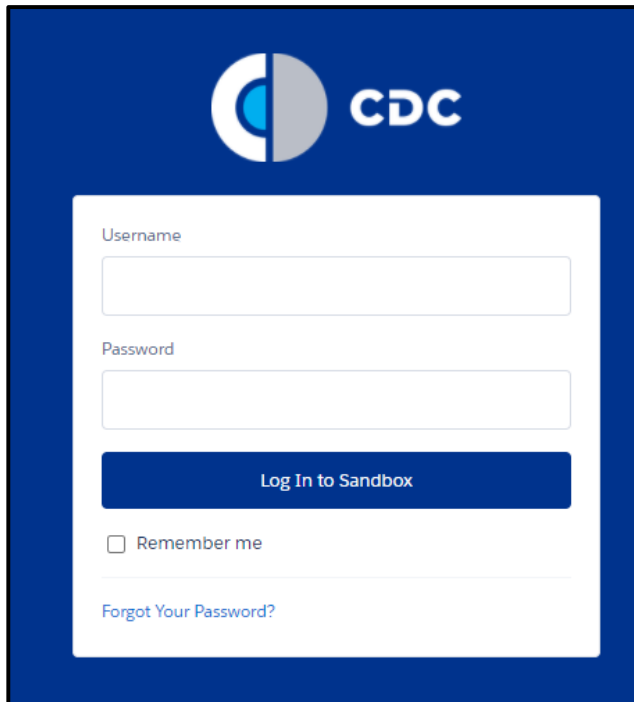
## 1. PARTNER PORTAL HOMEPAGE

Once your user profile is created by your Admin in Salesforce, you will receive email from Salesforce to verify your account and create password.

Open Chrome or Firefox or Microsoft Edge and navigate to Salesforce:  
contdiscpartner.cs66.force.com/login

Enter your user name and the password, use the username from the welcome email you received from Salesforce.

- a. Select “Log In to Sandbox.”
- b. If you’ve lost your user ID or password complete one of the following:
  - i. Contact your administrator, “SalesforceSupport@contdisc.com” to reset your password.
  - ii. Use the “Forgot password” feature on the login page.

The image shows a login page for the CDC Partner Portal. At the top, there is a blue header with the CDC logo on the left and the text "CDC" on the right. Below the header is a white login form. The form contains two input fields: "Username" and "Password". Below these fields is a blue button labeled "Log In to Sandbox". Under the button is a checkbox labeled "Remember me". At the bottom of the form is a link that says "Forgot Your Password?".

## 2. HOMEPAGE OVERVIEW


Partner Portal home page consists of Calendar, list of open leads and tasks


The screenshot shows the Partner Portal homepage. At the top is a blue header with the CDC logo on the left and a search bar on the right. Below the header is a navigation menu with links: Home, Tasks, Leads, Accounts, Contacts, Opportunities, Quotes, Reports, Dashboards, and Goals & Performance. The main content area is divided into three sections. On the left is a calendar for October 25, 2020, to October 31, 2020. In the center is a 'New Event' button. On the right is a section titled 'ALL OPEN LEADS' which lists several leads, including '10/18/20 Test Jump to Assigned' and 'Can McGlond see this v2'. Below the leads is a 'MY TASKS' section showing a task for 'Big Customer Co' on Oct 16. Red circles with numbers 1 through 6 are overlaid on the image to highlight specific features: 1 points to the search bar, 2 points to the user profile icon, 3 points to the calendar date range, 4 points to the 'New Event' button, 5 points to the 'ALL OPEN LEADS' section, and 6 points to the 'MY TASKS' section.

The screenshot shows the Partner Portal homepage. At the top is a blue header with the CDC logo on the left and a search bar on the right. Below the header is a navigation menu with links: Home, Tasks, Leads, Accounts, Contacts, Opportunities, Quotes, Reports, Dashboards, and Goals & Performance. The main content area is divided into three sections. On the left is a calendar for October 25, 2020, to October 31, 2020. In the center is a 'New Event' button. On the right is a section titled 'ALL OPEN LEADS' which lists several leads, including '10/18/20 Test Jump to Assigned' and 'Can McGlond see this v2'. Below the leads is a 'MY TASKS' section showing a task for 'Big Customer Co' on Oct 16. Red circles with numbers 1 through 6 are overlaid on the image to highlight specific features: 1 points to the search bar, 2 points to the user profile icon, 3 points to the calendar date range, 4 points to the 'New Event' button, 5 points to the 'ALL OPEN LEADS' section, and 6 points to the 'MY TASKS' section.

1. Search - this is global search field. You can type in the name of the record (e.g. account name or contact name) to search.
2. User Profile- click here to log out of the salesforce application.
3. Calendar- Displays the date along with time. When clicked on any of the cell, a **New Event** page is displays which enables the user to create event.
4. New Event button- a New Event page appears from which user can create a new event for specific time. User can check for the availability/ specific day/month/ year by clicking on the dropdown icon.
5. Lead Inbox- Displays the list of all open leads .

6. My Tasks- Lists all the tasks assigned to the logged in user.
7. My Calendar- Lists the events that user can share with other users by clicking on **Share With** button.
8. All Tasks (Partners)- this chart displays the chart of number of tasks for each account/company.
9. Icons of all the brands- user will be directed to the respective page in a new tab.

Clicking on  icon will redirect the user to <https://www.contdisc.com/> link

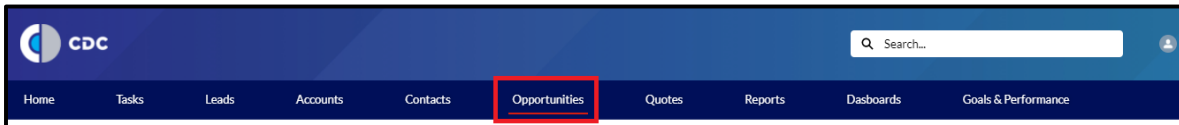
Clicking on  icon will redirect the user to <https://www.grothcorp.com/> link

Clicking on  icon will redirect the user to <https://lamotvalvearrestor.com/> link

Clicking on  icon will redirect the user to <https://lamotvalvearrestor.com/> link

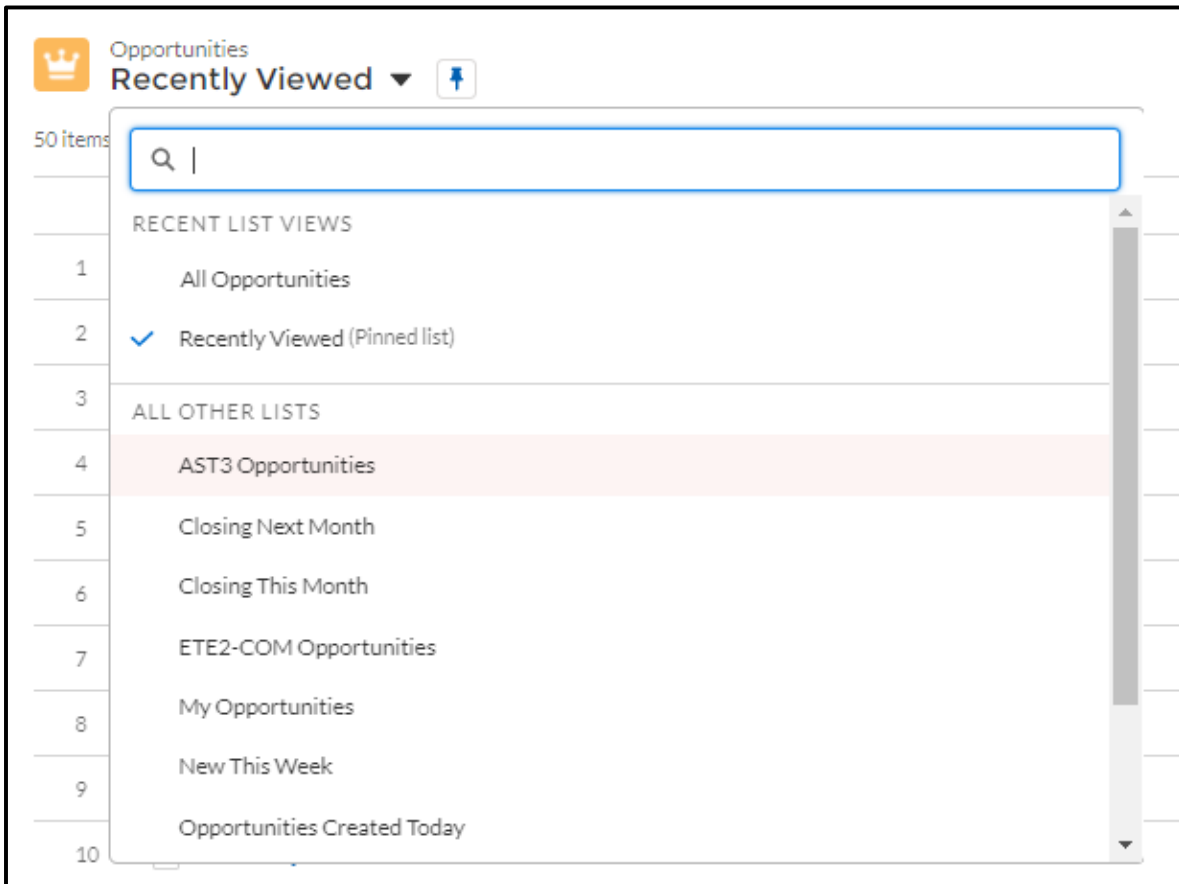
### 3. CREATE LIST VIEW

After login into Salesforce, you will be directed to the Salesforce Home page. From application navigation bar, click on “Opportunities” tab



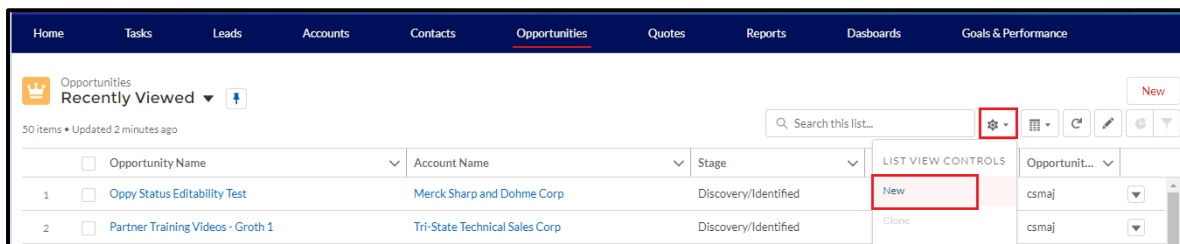
#### 3.1. Lists

You will see recently viewed opportunities list. A pinned list is the default list view for that object. To change or select another opportunities list, click on the small arrow next to the list name



#### 3.2. Create New List View

1. Select “New” from the List View Controls menu (⚙️)



## 2. Name the list and save

### New List View

**\* List Name**

Groth Opportunities

**Who sees this list view?**

☒ Only I can see this list view

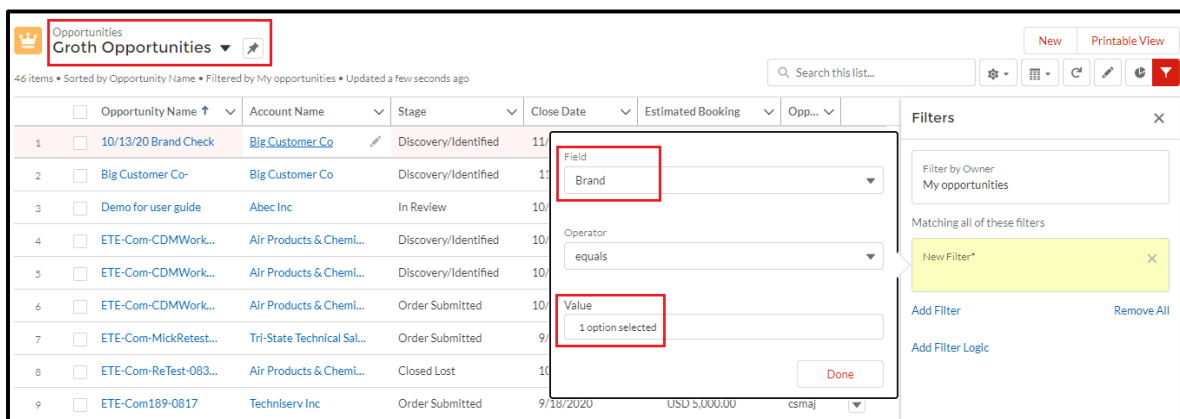
☐ All users can see this list view ⓘ

☐ Share list view with groups of users ⓘ

Cancel

Save

3. Click on “Add Filters” to add more filters to your list
4. Select the opportunity field as “Brand”, Operator as “equals” and Value as “Groth” to filter your list
5. Click Done > Save and verify your list



6. If needed, you can update columns in the your list, by clicking on gear icon > select fields to display> select the fields that you want to display move those fields from



available section to visible section by clicking on the right arrow and vice versa ( left arrow) to move fields from visible section to available section > if you reorder the fields then, click on the up and down arrow next to the visible fields section.

|   | <input type="checkbox"/> Opportunity Name ↑    | <input type="checkbox"/> Account Name | <input type="checkbox"/> Stage | <input type="checkbox"/> Close Date | <input type="checkbox"/> Estimated Booking | <input type="checkbox"/> Opp... |
|---|--|---------------------------------------|--------------------------------|-------------------------------------|--|---------------------------------|
| 1 | <input type="checkbox"/> 10/13/20 Brand Check  | Big Customer Co                       | Discovery/Identified           | 11/12/2020                          | USD 500.00                                 | csmaj                           |
| 2 | <input type="checkbox"/> Big Customer Co-      | Big Customer Co                       | Discovery/Identified           | 11/5/2020                           |  | csmaj                           |
| 3 | <input type="checkbox"/> Demo for user guide   | Abec Inc                              | In Review                      | 10/17/2020                          | USD 1,000.00                               | csmaj                           |
| 4 | <input type="checkbox"/> ETE-Com-CDMWork...    | Air Products & Chemi...               | Discovery/Identified           | 10/15/2020                          | USD 1.00                                   | csmaj                           |
| 5 | <input type="checkbox"/> ETE-Com-CDMWork...    | Air Products & Chemi...               | Discovery/Identified           | 10/15/2020                          | USD 1.00                                   | csmaj                           |
| 6 | <input type="checkbox"/> ETE-Com-CDMWork...    | Air Products & Chemi...               | Order Submitted                | 10/15/2020                          | USD 1.00                                   | csmaj                           |
| 7 | <input type="checkbox"/> ETE-Com-MickRetest... | Tri-State Technical Sal...            | Order Submitted                | 9/30/2020                           | USD 5.00                                   | csmaj                           |

### 3.3 Pin a List View

1. To pin the List View, click on the Pin icon present beside the list view name.

|   | <input type="checkbox"/> Opportunity Name ↑   | <input type="checkbox"/> Account Name |
|---|---|---------------------------------------|
| 1 | <input type="checkbox"/> 10/13/20 Brand Check | Big Customer Co                       |
| 2 | <input type="checkbox"/> Big Customer Co-     | Big Customer Co                       |
| 3 | <input type="checkbox"/> Demo for user guide  | Abec Inc                              |

Note: All the objects can have list views set up. Users can create a list view to see a specific set of contacts, leads, and accounts with different filters.

## 4. ACCOUNTS

An 'Account' represents an organization with whom CDC interacts while developing, nurturing, and maintaining customer relationships. These can be outside rep firms, existing customers, potential customers, engineering firms, etc. Account records hold useful information about specific organizations and can be categorized by the type of relationship CDC has with the company. CDC employees and outside sales reps (users) can capture information about the company in CDC's Salesforce CRM system.

### 1. Navigate to Account tab from home page



List of recently viewed accounts will be displayed

The screenshot shows the 'Recently Viewed' section of the Accounts tab in Salesforce CRM. It displays a list of 5 accounts with columns for Account Name, Account ID, Street, City, State/Province, Zip/Postal Code, Country, and Type. The 'New' button is visible in the top right corner.

|   | Account Name                     | Account ID | Street                        | City     | State/Province | Zip/Postal Code | Country       | Type           |
|---|----------------------------------|------------|-------------------------------|----------|----------------|-----------------|---------------|----------------|
| 1 | Advansix Hopewell Plant          | A-0041389  |                               |          |                |                 | United States |                |
| 2 | OutsideTerritoryAcc-(P-org...    | A-0041383  | 1201 W Main St                | La Porte | Texas          | 77571           | United States |                |
| 3 | Tri-State Technical Sales Corp   | A-0009758  | 382 Lancaster Ave PO Box 4006 | Malvern  | Pennsylvania   | 19355           | United States | Representative |
| 4 | Tri-State Tech - Baltimore   F4  | A-0012047  |                               |          |                |                 | United States |                |
| 5 | Tri-State Tech - Philadelphia... | A-0012049  |                               |          |                |                 | United States |                |

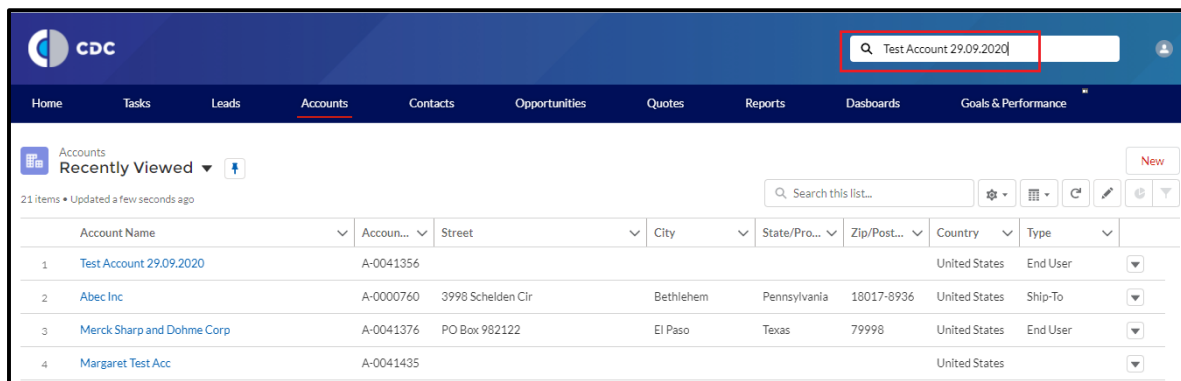
### 4.1 Search for Existing Account

1. To search for an already existing account, user can enter the account name in the search box. Search results matching the criteria will list.

The screenshot shows the 'Recently Viewed' section of the Accounts tab in Salesforce CRM. A search box is highlighted with a red box, containing the text 'Test'. The list shows 2 items. The 'New' button is visible in the top right corner.

|   | Account Name            | Account ID | Street            | City      | State/Province | Zip/Postal Code | Country       | Type     |
|---|-------------------------|------------|-------------------|-----------|----------------|-----------------|---------------|----------|
| 1 | Abec Inc                | A-0000760  | 3998 Schelden Cir | Bethlehem | Pennsylvania   | 18017-8936      | United States | Ship-To  |
| 2 | Test Account 29.09.2020 | A-0041356  |                   |           |                |                 | United States | End User |

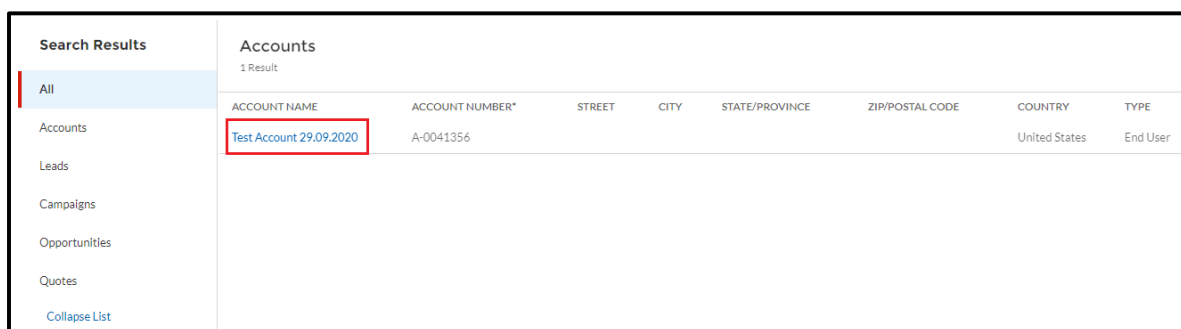
1. If the user does not want to limit the search to a specific object, type search term in the global search box.



The screenshot shows the Salesforce CDC Accounts page. At the top, there is a search bar containing the text "Test Account 29.09.2020". Below the search bar is a navigation bar with tabs: Home, Tasks, Leads, Accounts, Contacts, Opportunities, Quotes, Reports, Dashboards, and Goals & Performance. The "Accounts" tab is selected. Below the navigation bar, there is a section titled "Accounts Recently Viewed" with a sub-header "21 items • Updated a few seconds ago". To the right of this section is a "New" button. Below the sub-header is a search bar "Search this list..." and several icons for filtering and actions. Below these is a table with columns: Account Name, Account..., Street, City, State/Pro..., Zip/Post..., Country, and Type. The table contains four rows of data.

|   | Account Name               | Account... | Street            | City      | State/Pro... | Zip/Post... | Country       | Type     |
|---|----------------------------|------------|-------------------|-----------|--------------|-------------|---------------|----------|
| 1 | Test Account 29.09.2020    | A-0041356  |                   |           |              |             | United States | End User |
| 2 | Abec Inc                   | A-0000760  | 3998 Schelden Cir | Bethlehem | Pennsylvania | 18017-8936  | United States | Ship-To  |
| 3 | Merck Sharp and Dohme Corp | A-0041376  | PO Box 982122     | El Paso   | Texas        | 79998       | United States | End User |
| 4 | Margaret Test Acc          | A-0041435  |                   |           |              |             | United States |          |

Select the desired record



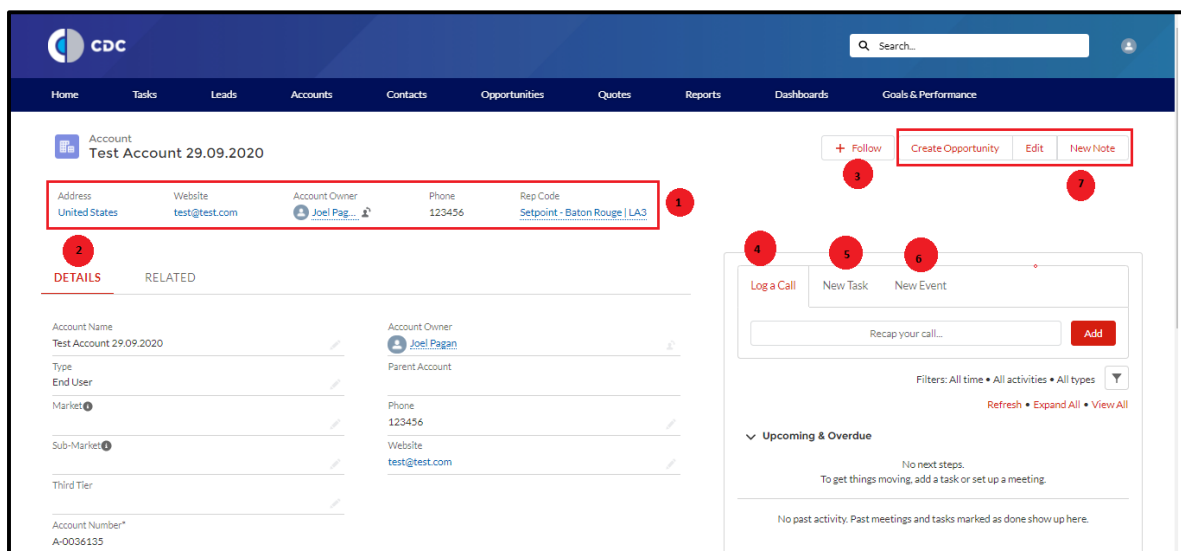
The screenshot shows the Salesforce Search Results page. On the left, there is a sidebar with a "Search Results" section. Below this section are links for "All", "Accounts", "Leads", "Campaigns", "Opportunities", "Quotes", and "Collapse List". The "Accounts" link is selected. To the right of the sidebar is a table titled "Accounts" with a sub-header "1 Result". The table has columns: ACCOUNT NAME, ACCOUNT NUMBER\*, STREET, CITY, STATE/PROVINCE, ZIP/POSTAL CODE, COUNTRY, and TYPE. The table contains one row of data.

| ACCOUNT NAME            | ACCOUNT NUMBER* | STREET | CITY | STATE/PROVINCE | ZIP/POSTAL CODE | COUNTRY       | TYPE     |
|-------------------------|-----------------|--------|------|----------------|-----------------|---------------|----------|
| Test Account 29.09.2020 | A-0041356       |        |      |                |                 | United States | End User |

Global search is always within easy reach at the top of the page so inside sales users can find any searchable object in Salesforce.

The **Search Results** section shows the best matches for the objects that are use most. To see results for a specific object, click the object's name in the sidebar.

User will be directed to Account details page.



The screenshot shows the Salesforce Account details page for "Test Account 29.09.2020". At the top, there is a search bar and a navigation bar with tabs: Home, Tasks, Leads, Accounts, Contacts, Opportunities, Quotes, Reports, Dashboards, and Goals & Performance. The "Accounts" tab is selected. Below the navigation bar, there is a section titled "Account Test Account 29.09.2020". To the right of this section are buttons: "+ Follow", "Create Opportunity", "Edit", and "New Note". Below these buttons is a table with columns: Address, Website, Account Owner, Phone, and Rep Code. The table contains one row of data. Below the table is a section titled "DETAILS" with a sub-header "RELATED". To the right of the "DETAILS" section is a section titled "Upcoming & Overdue" with a sub-header "No next steps. To get things moving, add a task or set up a meeting." Below this section is a section titled "No past activity. Past meetings and tasks marked as done show up here."

| Address       | Website       | Account Owner | Phone  | Rep Code                     |
|---------------|---------------|---------------|--------|------------------------------|
| United States | test@test.com | Joel Pagan    | 123456 | Setpoint - Baton Rouge   LA3 |

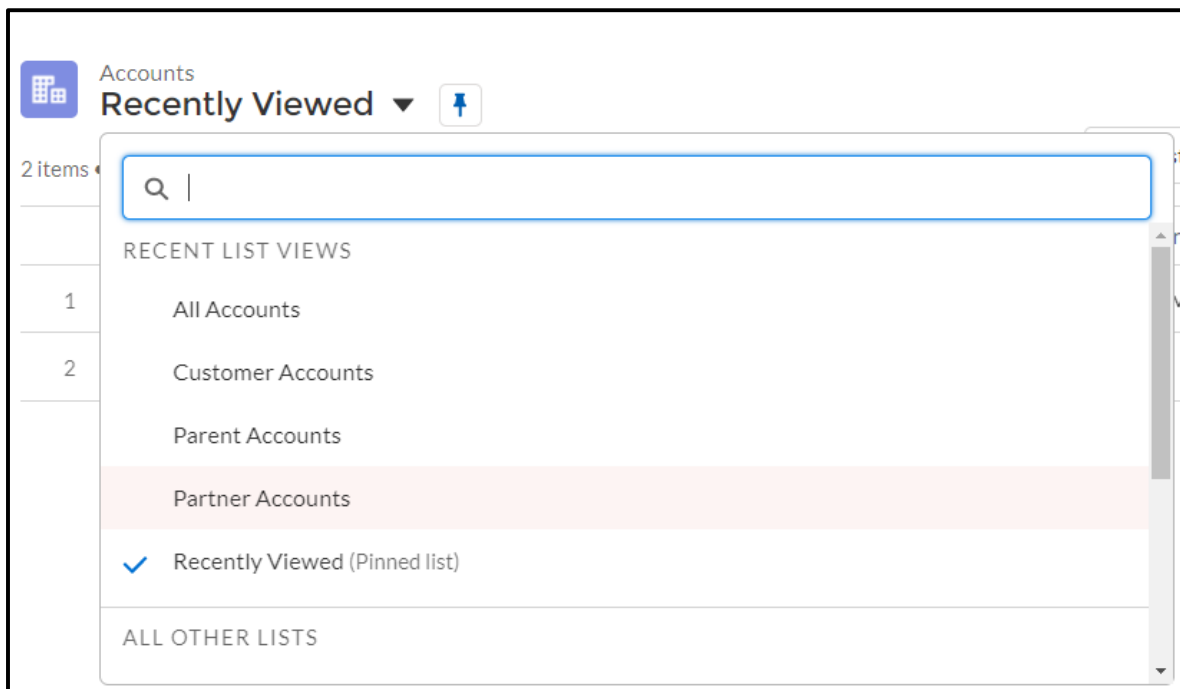
The screenshot displays the 'Account' screen with the following sections and callouts:

- Address Information (8):** Shows 'Address' as 'United States'.
- Territory Info (9):** Shows 'Rep Code' as 'Setpoint - Baton Rouge | LA3', 'Rep Code Region' as 'D02', and 'Rep Code District' as 'AMERICAS'.
- System Information (10):** Shows 'Created By' as 'Joel Pagan, 9/29/2020 7:36 AM' and 'Last Modified By' as 'Joel Pagan, 9/29/2020 7:36 AM'. It also shows 'Account Record Type' as 'Customer Account'.
- Custom Links (11):** Shows links for 'Google Maps', 'Google News', and 'Google Search'.

The following things are displayed on the Account screen:

- i. Displays Accounts details such as address, owner, phone, website and Rep-code.
- ii. Details section that contains information about Type of account, Account Number, Contact number/website etc.,
- iii. Follow button- Allows the user to follow the record so that any updates associated to this Account will be intimated.
- iv. Log a Call - Allows user to schedule a call.
- v. New Task - User can create a new task for the account.
- vi. New Event – User can create a new event by entering the required details.
- vii. Create Opportunity/Note/Edit buttons- **Create Opportunity** button directs the user to new opportunity screen which has account details defaulted on it. **Edit** button allows the user to edit the account details. User can create a note by clicking on **New Note** button
- viii. Address Details- Displays the Country entered during account creation
- ix. Territory Information- displayed based on the Rep Code selected
- x. System Information section displays the details such as user who has created/ modified the account record and account record type.
- xi. Custom Links section displays the links such as Google Maps/Google Search

2. Alternatively, user can change the List View and search for the desired account.



There are three types of accounts - Customer Accounts, Parent Accounts and Partner / House Accounts.

**Customer Accounts:** These are customer accounts and end user accounts. All users can create Customer Accounts.

**Parent Accounts:** Parent accounts will be used to roll up information for conglomerate accounts. Parent Accounts are created and managed by **admins**.

**Partner / House Accounts** - Partner accounts are accounts that are used to manage partner organizations, partner users, and activities when using a partner community or partner portal. Sales reps are tied to this level. 'Partner/House' Accounts are the Accounts that will be tagged to Opportunities to get the representatives Commissions.

Note that Partner users can create only **Customer Accounts**. The only Partner OR Parent Accounts that they will see are the one's associated with their Organization.

#### 4.2 Creation of Account

Partner Users can create only Customer Accounts. The Account Record Type field is defaulted as Customer Account and is read only.

1. To create a new Account, Click on **New** button.

| Accounts                             |                               | Recently Viewed     |                |          |            |            |               | New  |  |
|--------------------------------------|-------------------------------|---------------------|----------------|----------|------------|------------|---------------|------|--|
| 21 items • Updated a few seconds ago |                               | Search this list... |                |          |            |            |               |      |  |
|                                      | Account Name                  | Accou...            | Street         | City     | State/P... | Zip/Pos... | Country       | Type |  |
| 1                                    | Advansix Hopewell Plant       | A-0041389           |                |          |            |            | United States |      |  |
| 2                                    | OutsideTerritoryAcc-(P-org... | A-0041383           | 1201 W Main St | La Porte | Texas      | 77571      | United States |      |  |

## 2. Enter the details required to create Account

### New Account: Customer Account

#### Account Information

Account Name

Test Account

Type

Agent

Market

Oil and Gas Upstream

Sub-Market

Compressor equipment/systems

Third Tier

--None--

Account Owner

Colin Luke

Parent Account

Phone

12345

Website

test@test.com

Cancel

Save & New

Save

Note that an error message is displayed when Account name, Market, Type and Rep code are not entered







### Edit Test Account

**\* Account Name**

Type

Market ⓘ

View all dependencies

Sub-Market ⓘ

View all dependencies

Third Tier

View all dependencies

Account Number\*  
A-0036136

**Address Information**  
Address

Account Owner  
Colin Luke

Parent Account

Phone

Website

An error message is displayed when user edits the Parent, Partner, or Customer Accounts that have Relationship = Customer

### Edit 3M Co

Review the errors on this page.

Sorry, this Account can only be edited by CDC/Groth personnel. Please reach out to a CDC/Groth Employee via phone, email, or assigning a Task to assist you with making a change.

**\* Account Name**

**\* Type**

Relationship  
Customer

**\* Market** ⓘ

View all dependencies

Sub-Market ⓘ

Account Owner  
Colin Luke

Parent Account

Phone

Website

#### 4.4 Account Related Tab

Related Tab consists of the below mentioned sections which displayed the associated records to the currently opened account:

- Opportunities
- Account Team
- Related Contacts
- Files
- Freight Information

User can create a new relation/ add notes by clicking on the highlighted buttons as shown below

The screenshot displays the 'RELATED' tab of a CRM interface. It features five main sections, each with a header bar containing an icon and a count in parentheses. The 'Account Team' section is currently expanded, showing a table with one member, Carl Smajda, in the role of Sales Rep. Other sections include Opportunities (0), Related Contacts (0) with 'New Contact' and 'Add Relationship' buttons, Files (0) with an 'Add Files' button and a file upload area, and Freight Information (0) with a 'New' button.

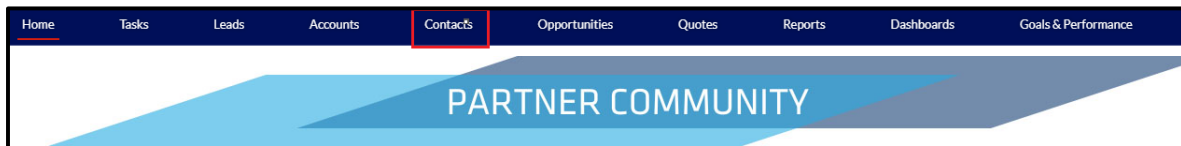
| Account Team (1) |           | <a href="#">Add Team Members</a> | <a href="#">Team Member Access</a> | ▼ |
|------------------|-----------|----------------------------------|------------------------------------|---|
| Team Member      | Team Role |                                  |                                    |   |
| Carl Smajda      | Sales Rep | ▼                                |                                    |   |

[View All](#)

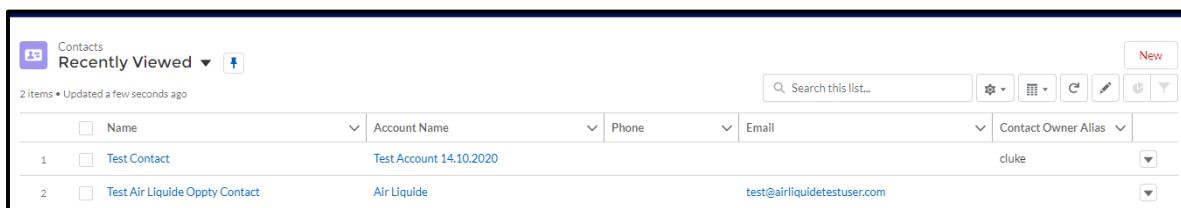
## 5. CONTACTS

Contact represents the individual people associated with business account in CDC. Both Internal sales Users and Partner Users are responsible for creating contacts. Whoever is the first to reach out to a person in trying to set up a Sale should add the person as a Contact.

1. Navigate to Contact tab from home page

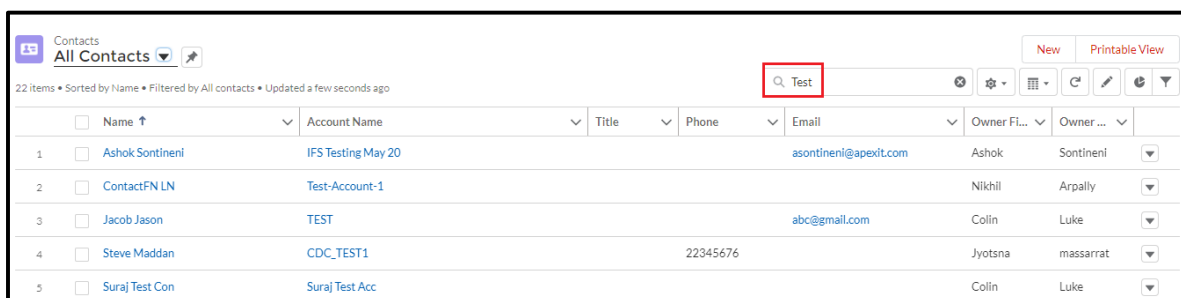


List of recently viewed Contacts will be displayed

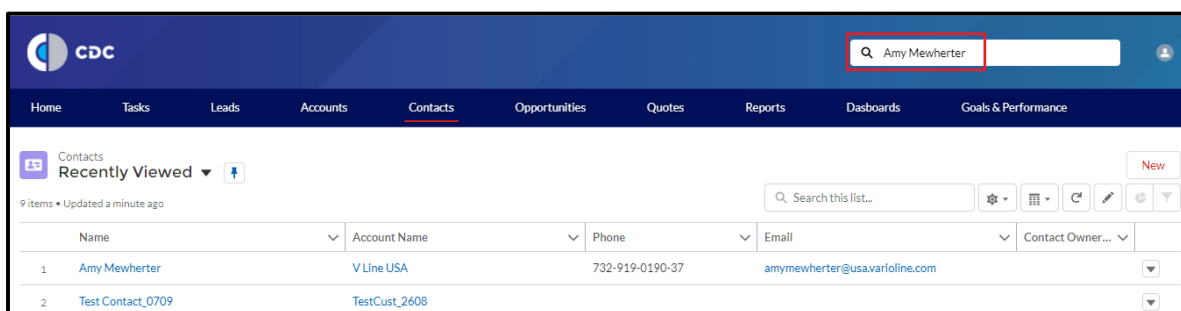


### 5.1 Search for Existing Contact

1. To search for an already existing Contact, user can enter the Contact name in the search box. Search results matching the criteria will list.

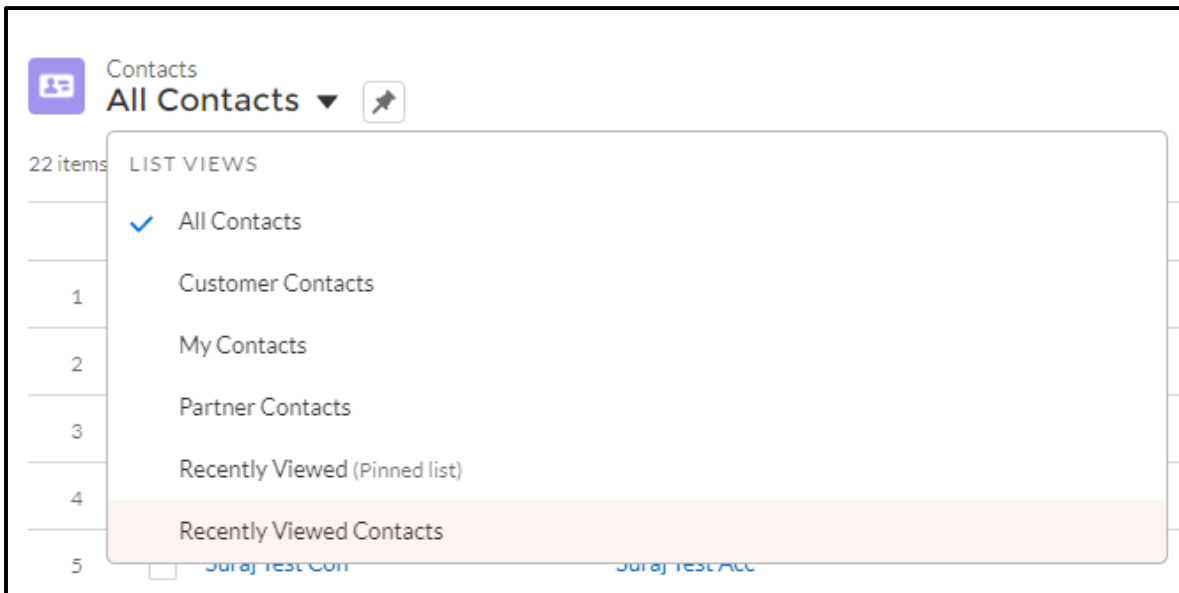


2. If the user does not want to limit the search to a specific object, type search term in the global search box



3. Click on the Contact name
4. User will be directed to contact details page

5. Alternatively, user can change the filter and search for the desired Contact.

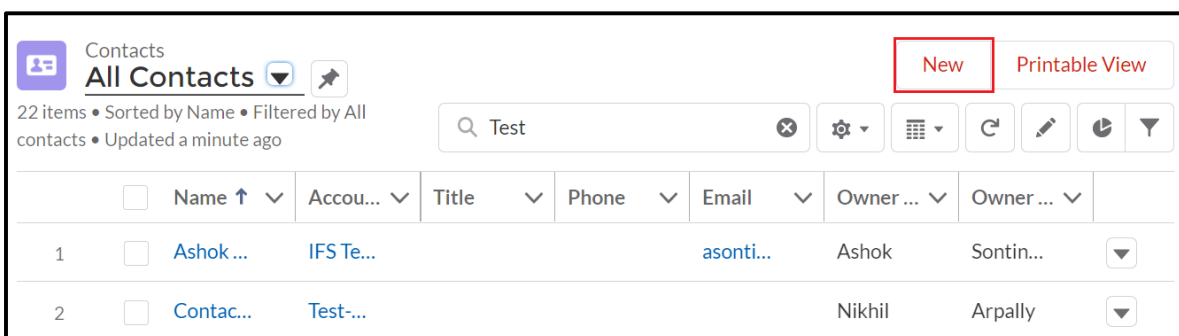


Note: If partner user is not able to find the contact, then following can be the reasons:

- The contact does not exist in the system. In this case, you create a new contact
- The contact is associated to the account, which is either not owned by you or not shared with you via Account Team functionality.

## 5.2 Creation of Contact

1. To create a new Contact, Click on **New** button



2. Enter the details required to create Contact

New Contact

Contact Information

\* Name

Salutation

--None--

Email

test@test.com

First Name

Test

Middle Name

Contact

\* Last Name

15.10.2020

Suffix

Cancel

Save & New

Save

Note that an error message is displayed when Account Name, Contact Currency and Last Name are not entered

New Contact

Review the errors on this page.

These required fields must be completed: Account Name, Last Name

Contact Information

\* Name

Salutation

--None--

Email

First Name

Middle Name

\* Last Name

Cancel

Save & New

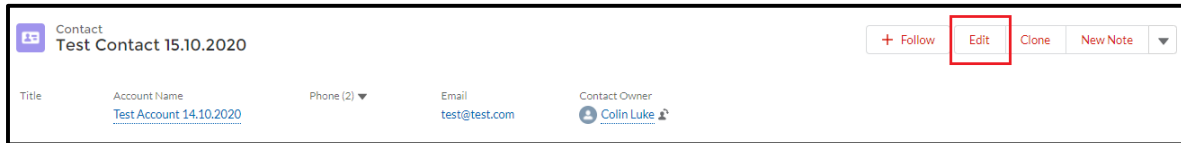
Save

### 5.3 Edit Contact Information

Partner Users can only edit those Contacts that are related to Accounts they can edit (Customer Accounts that do NOT have relationship field = Customer). Partner Users will not

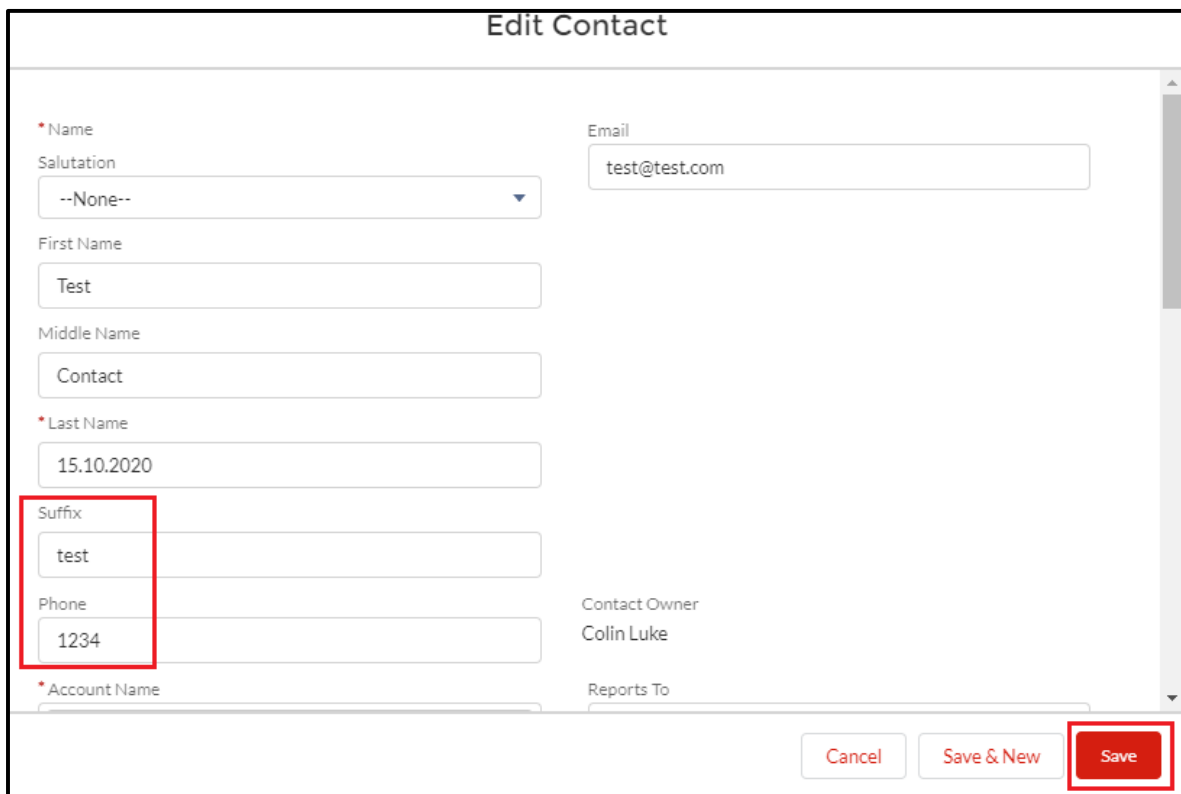
be able to edit related contacts of an Account which is a Customer of CDC. Therefore, Partner Users will be reaching out to CDC team for assistance on editing those records.

1. Click on **Edit** button



This screenshot shows the top section of a contact record. The title is "Contact Test Contact 15.10.2020". On the right, there are buttons: "+ Follow", "Edit" (highlighted with a red box), "Clone", and "New Note". Below the title, there are fields for "Title", "Account Name" (with a link to "Test Account 14.10.2020"), "Phone (2)" (with a dropdown arrow), "Email" (with the value "test@test.com"), and "Contact Owner" (with a user icon and the name "Colin Luke").

2. Make necessary changes and click on **Save** button

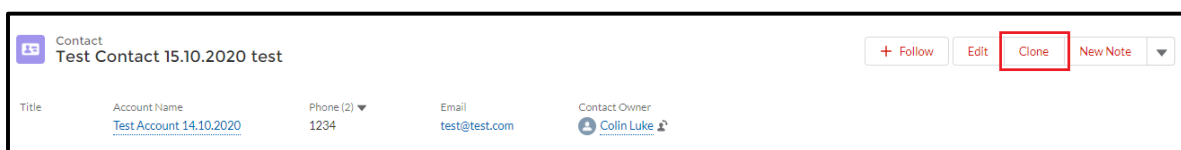


This screenshot shows the "Edit Contact" form. The title is "Edit Contact". The form contains several input fields: "Salutation" (with a dropdown menu showing "--None--"), "Email" (with the value "test@test.com"), "First Name" (with the value "Test"), "Middle Name" (with the value "Contact"), "Last Name" (with the value "15.10.2020"), "Suffix" (with the value "test", highlighted with a red box), "Phone" (with the value "1234", highlighted with a red box), "Account Name", and "Reports To". The "Contact Owner" is listed as "Colin Luke". At the bottom right, there are three buttons: "Cancel", "Save & New", and "Save" (highlighted with a red box).

#### 5.4 Clone a Contact

Cloning a Contact allows the Inside Sales User to add a contact that is similar to an existing contact. Cloning saves users from multiple keystrokes and time.

1. Click on **Clone** button present on right top corner of the page



This screenshot shows the top section of a contact record. The title is "Contact Test Contact 15.10.2020 test". On the right, there are buttons: "+ Follow", "Edit", "Clone" (highlighted with a red box), and "New Note". Below the title, there are fields for "Title", "Account Name" (with a link to "Test Account 14.10.2020"), "Phone (2)" (with the value "1234"), "Email" (with the value "test@test.com"), and "Contact Owner" (with a user icon and the name "Colin Luke").

Contact creation page will appear will contain all the details same as the contact from which it is being cloned.

2. User can also make the changes to the fields
3. Click on **Save** button once details are entered/ confirmed

New Contact

Contact Information

Name

Salutation

--None--

Email

test@test.com

First Name

Test

Middle Name

Contact

Last Name

15.10.2020

Suffix

test

Phone

1234

Contact Owner

Colin Luke

Cancel

Save & New

Save

All the records associated with the contact are displayed on the right of the screen in separate sections as shown below. User can create new records in each section by clicking on the dropdown icon.

Contact

Test Contact\_0709

+ Follow

New Opportunity

Edit

Clone

Title

Account Name

Phone (2)

Email

Contact Owner

TestCust\_2608

Nidhi Shetty

DETAILS

ACTIVITY

Contact Information

Name

Test Contact\_0709

Contact Record Type

Department

Account Name

TestCust\_2608

Title

Reports To

Contact Currency

USD - U.S. Dollar

Opportunities (0)

New

Related Accounts (2)

Add Relationship

Account Name

Direct

Roles

Test Account 0...

☐

TestCust\_2608

☒

View All

Files (0)

Add Files

▼ Correspondence Information

Email

Phone

Mailing Address

United States

Fax

Upload Files

Or drop files

📌 Open Activities (0)

New Task

New Event

📌 Activity History (0)

Send an Email



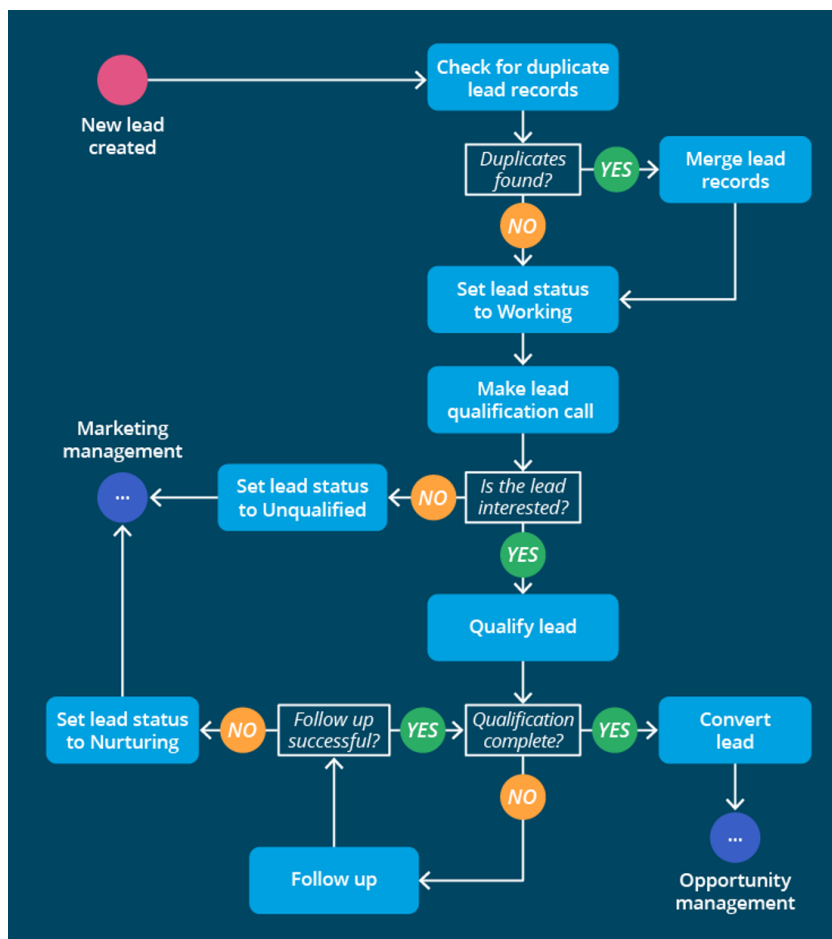
## 6. LEADS

Leads are precursor to an opportunity. A standard Salesforce lead record consists of fields that store information about each person that expressed interest to do business with CDC.

CDC currently can track all stages of the lead management process, including:

- Capture leads through Pardot and directly in Salesforce through UI or list uploads.
- Scoring leads to identify which ones are sales-ready (in Pardot)
- Prioritizing leads and assigning them to appropriate sales reps through Assignment rules in Salesforce
- Converting qualified leads into a sales opportunity
- Nurturing leads that are not ready to buy yet.

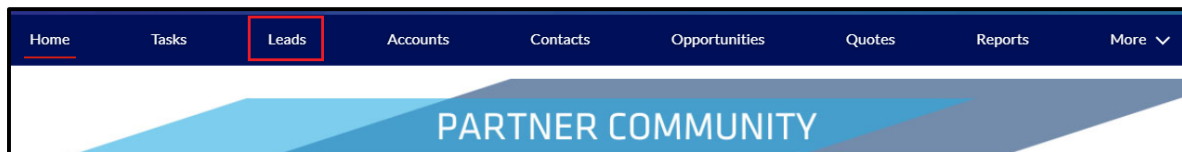
### Lead Process:



- Important fields to lookout are:
- **Lead Owner:** Lead Owner is a person or queue that the lead is assigned to through the assignment rules. If assigned to the queue, person accepting lead becomes the owner. Lead owner is responsible for progressing leads they own to a logical conclusion in the quickest time possible. Value of leads decrease exponentially as time passes without any activity on them. Hence, it is important to track time it takes for the lead to progress across stages.

- **Lead Status:** Lead Status indicates the sales path CDC expects the owners of the leads to follow so that conversion rates and customer satisfaction rates are high. Some of the lead track stages are: New; Working; Nurturing; Unqualified; Qualified.
- **Lead Source:** Lead source identifies the source of the lead record. It captures where leads came from. Though this field is optional, we advise CDC to make it mandatory for sales reps to fill in the Lead Source. Users can select from the following lead source list:
- Advertisement; Customer event; Employee referral; Purchased list; Trade show; Webinar; Website; Others.
- Lead Assignment Process is manual. All leads (manual or coming from Pardot) are first going into an Admin queue.

#### 1. Navigate to Leads tab from home page



List of recently viewed Leads will be displayed

| <div> <div>Leads</div> <div>My Leads</div> <div></div> </div> <div> <div>New</div> <div>Printable View</div> </div>  |   |       |             |       |              |                   |       |                          |  |
|--|---|-------|-------------|-------|--------------|-------------------|-------|--------------------------|--|
| <div>4 items • Sorted by Name • Filtered by My leads • Updated a few seconds ago</div> <div> <div>Search this list...</div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> |   |       |             |       |              |                   |       |                          |  |
| <input type="checkbox"/>   | Name ↑  | Co... | State/Pr... | Em... | Lead Stat... | Created Date      | Ow... | Un...                    |  |
| 1  | <input type="checkbox"/> Test 07/02/20 Test can Zach Sanders see this | Test  |             |       | New          | 7/2/2020 5:15 PM  | cluke | <input type="checkbox"/> |  |
| 2  | <input type="checkbox"/> Test 7/8/20 Test for Visibility setpoint     | Test  |             |       | New          | 7/8/2020 7:23 AM  | cluke | <input type="checkbox"/> |  |
| 3  | <input type="checkbox"/> Test Lead Apoorva 002                        | Test  | California  |       | Converted    | 5/10/2020 4:08 AM | cluke | <input type="checkbox"/> |  |
| 4  | <input type="checkbox"/> Test Lead Apoorva 002                        | Test  | California  |       | Working      | 5/30/2020 2:50 AM | cluke | <input type="checkbox"/> |  |

### 6.1 Search for Existing Leads

1. To search for an already existing Leads, user can enter the Leads name in the search box. Search results matching the criteria will list.

| <div> <div>Leads</div> <div>All Open Leads</div> <div></div> </div> <div> <div>New</div> <div>Printable View</div> </div>  |   |       |            |         |               |       |      |             |               |
|--|---|-------|------------|---------|---------------|-------|------|-------------|---------------|
| <div>5 items • Sorted by Name • Filtered by All leads - Lead Status • Updated a few seconds ago</div> <div> <div>test</div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> |   |       |            |         |               |       |      |             |               |
| <input type="checkbox"/>   | Name ↑                                  | Co... | State/P... | Zip/... | Country       | Ph... | E... | Lead Sta... | Owne...       |
| 1  | <input type="checkbox"/> Test 07/0...   | Test  |            |         | United Sta... |       |      | New         | Col... Luke   |
| 2  | <input type="checkbox"/> Test 7/8/2...  | Test  |            |         | United Sta... |       |      | New         | Col... Luke   |
| 3  | <input type="checkbox"/> Test Lead ...  | Test  | California | 920...  | United Sta... |       |      | Converted   | Col... Luke   |
| 4  | <input type="checkbox"/> Test Lead ...  | Test  | California | 920...  | United Sta... |       |      | Working     | Col... Luke   |
| 5  | <input type="checkbox"/> Test Test 0... | Test  |            |         | United Sta... |       |      | New         | Zach Sande... |

2. If the user does not want to limit the search to a specific object, type search term in the global search box.

The screenshot shows the Salesforce CDC interface. At the top, a search bar contains 'Abec Inc'. Below the navigation bar, the 'Search Results' section is active. On the left sidebar, 'Accounts', 'Leads', 'Campaigns', 'Opportunities', and 'Quotes' are listed. The main content area shows results for 'Accounts' (1 result) and 'Leads' (1 result). The 'Leads' result for 'Abec Inc' is highlighted with a red box, and a red circle with the text 'Click on existing Lead' points to it. Below the 'Leads' section, 'Opportunities' are listed (3 results, sorted by Relevance).

| ACCOUNT NAME | ACCOUNT NUMBER* | STREET            | CITY      | STATE/PROVINCE | ZIP/POSTAL CODE | COUNTRY       | TYPE     |
|--------------|-----------------|-------------------|-----------|----------------|-----------------|---------------|----------|
| Abec Inc     | A-0000760       | 3998 Schelden Cir | Bethlehem | Pennsylvania   | 18017-8936      | United States | End User |

| NAME     | TITLE | COMPANY | PHONE | MOBILE | EMAIL | LEAD STATUS | OWNER ALIAS |
|----------|-------|---------|-------|--------|-------|-------------|-------------|
| Abec Inc |       | test    |       |        |       | New         |             |

Global search is always within easy reach at the top of the page so inside sales users can find any searchable object in Salesforce.

The Search Results page shows the best matches for the objects that are use most. To see results for a specific object, click the object's name in the sidebar.

3. Click on the desired Lead to navigate to the Lead Details screen.

The screenshot shows the Salesforce Lead Details screen for 'Abec Inc'. The lead status is 'New'. The lead owner is 'Carl Smajda'. The lead source is 'Abec Inc'. The lead information is displayed in a table. The lead status is 'New'. The lead owner is 'Carl Smajda'. The lead source is 'Abec Inc'. The lead information is displayed in a table.

| Lead Status | Lead Owner  | Lead Source |
|-------------|-------------|-------------|
| New         | Carl Smajda | Abec Inc    |

Lead Currency  
USD - U.S. Dollar

▼ Correspondence Information

Email \_\_\_\_\_ Phone \_\_\_\_\_

Website \_\_\_\_\_ Mobile \_\_\_\_\_

Address  
United States

▼ Market Information

Market \_\_\_\_\_

Submarket \_\_\_\_\_

Third Tier \_\_\_\_\_

The Leads page contains the following:

- Details of the lead like – Name, Phone, Email, Title, Lead Status, Market, Submarket, No. of Employees, Lead Source, Sales Rep (Rep Code) Account, Pardot Notes Pardot comments, etc.
- Address information, Created By and Last Modified By.

4. Alternatively, user can change the filter and search for the desired Leads.

Leads

All Open Leads ▼

5 items

LIST VIEWS

- ✓ All Open Leads
- 1 My Leads
- 2 Recently Viewed (Pinned list)
- 3 Recently Viewed Leads
- 4 Today's Leads

## 6.2 Creation of Leads

Partner user can create Lead ; however, Leads will moew likely be created by CDC/Growth internal employees and then be assigned to the necessary partner orgs. So it is less likely that Partners will create their own leads

1. To create a new Leads, Click on **New** button

Leads  
My Leads ▾

4 items • Sorted by Name • Filtered by My leads • Updated 2 minutes ago

Search this list...

New Printable View

|   | <input type="checkbox"/> Name ↑                                       | Company | State/Province | Email | Lead Status | Created Date      | Owner All... | Unread ...               |   |
|---|---|---------|----------------|-------|-------------|-------------------|--------------|--------------------------|---|
| 1 | <input type="checkbox"/> Test 07/02/20 Test can Zach Sanders see this | Test    |                |       | New         | 7/2/2020 5:15 PM  | cluke        | <input type="checkbox"/> | ▾ |
| 2 | <input type="checkbox"/> Test 7/8/20 Test for Visibility setpoint     | Test    |                |       | New         | 7/8/2020 7:23 AM  | cluke        | <input type="checkbox"/> | ▾ |
| 3 | <input type="checkbox"/> Test Lead Apoorva 002                        | Test    | California     |       | Converted   | 5/10/2020 4:08 AM | cluke        | <input type="checkbox"/> | ▾ |
| 4 | <input type="checkbox"/> Test Lead Apoorva 002                        | Test    | California     |       | Working     | 5/30/2020 2:50 AM | cluke        | <input type="checkbox"/> | ▾ |

2. Enter the details required to create Leads
3. Click on **Save** button

### New Lead

**Lead Information**

\* Lead Status  
New ▾

Lead Owner  
Colin Luke

\* Name  
Salutation  
Mr. ▾

Website  
test@test.com

First Name  
Test

Middle Name  
Lead

\* Last Name  
15.10.2020

Suffix

☐ Assign using active assignment rule

Cancel Save & New **Save**

Note that an error message is displayed when Company, Leads Currency, Last Name and Lead Status are not entered

New Lead

Review the errors on this page.

These required fields must be completed: Company, Lead Currency, Last Name, Lead Status

Lead Information

\* Lead Status

--None--

Complete this field.

\* Name

Salutation

--None--

First Name

Middle Name

\* Last Name

Complete this field.

Suffix

Lead Owner

Colin Luke

Website

☐ Assign using active assignment rule

Cancel

Save & New

Save

October 20, 2020

30



### Edit Contact

\* Name

Salutation

--None--

Email

test@test.com

First Name

Test

Middle Name

Contact

\* Last Name

15.10.2020

Suffix

test

Phone

1234

Contact Owner

Colin Luke

\* Account Name

Reports To

Cancel

Save & New

Save

The status of Lead is marked on Lead Status bar and can be updated by clicking on a particular and clicking on **Mark Status as Complete** button

New

Working

Disqualified

Converted

✓ Mark Status as Complete

## 6.4 Related Records

All the records associated with the Leads are displayed on the right of the screen in separate sections as shown below. User can create new records in each section by clicking on the dropdown icon.

✓

✓

Assigned

Working

Disqualified

Converted

✓ Mark Status as Complete

DETAILS

ACTIVITY

Lead Information

Lead Status

Assigned

Name

Lead-4-[Markham]-Internal Change

Title

Company

Big Customer Co

Pardot Comments

Lead Owner

Lindsey Markham

Lead Source

Rating

Sales Rep (Rep Code) Account

Tri-State Tech - Philadelphia | F2

Files (0)

Add Files

Upload Files

Or drop files

Open Activities (0)

New Task

New Event

Activity History (0)

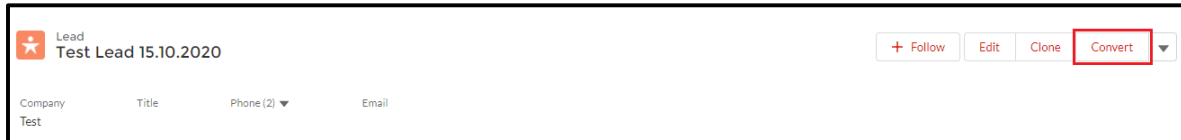
Send an Email



## 6.5 Lead Conversion Process

Once a lead is Qualified, a lead can then be converted into either an Account or Contact or Opportunity or All three together. We can either create a New Account/Contact or Associate to an existing.

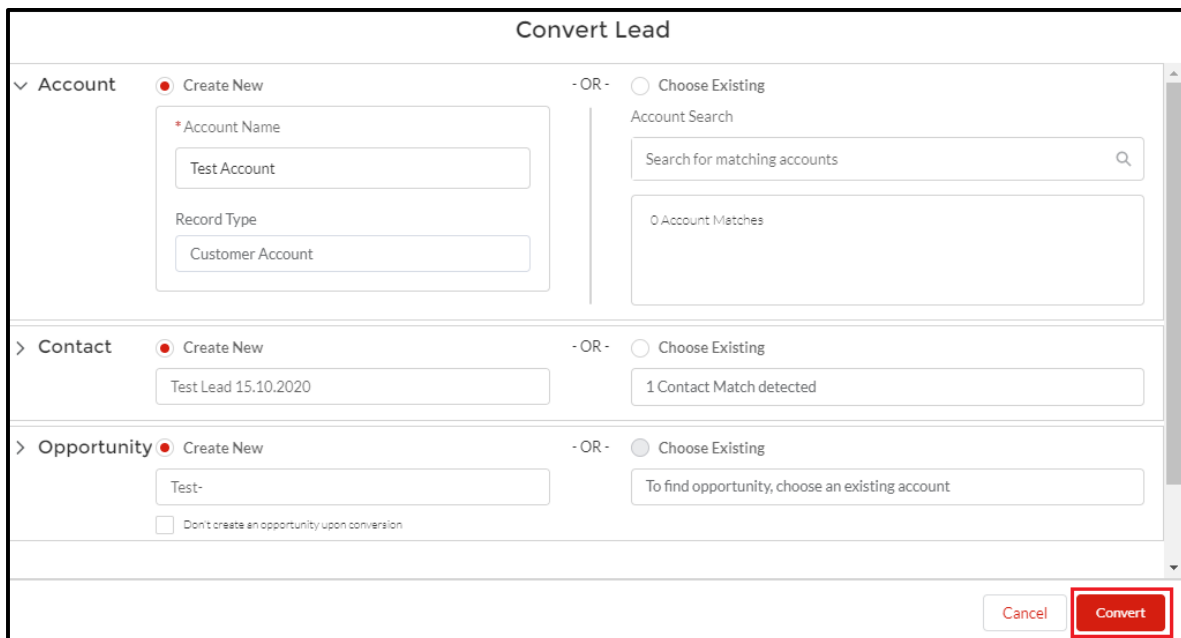
1. Click on **Convert** button



The screenshot shows the top of a lead record for 'Test Lead 15.10.2020'. In the top right corner, there are four buttons: '+ Follow', 'Edit', 'Clone', and 'Convert'. The 'Convert' button is highlighted with a red border. Below the buttons, there are labels for 'Company', 'Title', 'Phone (2)', and 'Email', with 'Test' entered under 'Company'.

User will be directed to Convert Leads page.

2. User can either create new Account, Contact and Opportunity or choose from the existing record



The screenshot shows the 'Convert Lead' form. It has three main sections: Account, Contact, and Opportunity. Each section has a 'Create New' radio button and a 'Choose Existing' radio button. The 'Account' section has a search bar and shows '0 Account Matches'. The 'Contact' section has a search bar and shows '1 Contact Match detected'. The 'Opportunity' section has a search bar and shows 'To find opportunity, choose an existing account'. At the bottom right, there are 'Cancel' and 'Convert' buttons. The 'Convert' button is highlighted with a red border.

When Converting a Lead and selecting an existing record to attach the Lead to, the field is a search bar, click on search bar and type in what you are looking for. A list of options will appear from which user can select the record

Convert Lead

Account

☐ Create New
 - OR -
 ☒ Choose Existing

\* Account Name

test abc

Record Type

Customer Account

Contact

☒ Create New
 - OR -
 ☐ Choose Existing

test

Opportunity

☒ Create New
 - OR -
 ☐ Choose Existing

test abc-

☐ Don't create an opportunity upon conversion

Account Search

Search for matching accounts

Test Account 14.10.2020  
A-0036136

Suraj Test Acc  
A-0012117

Test Account Apoorva 002  
A-0012155

Test Account  
A-0036139

Test Account 29.09.2020  
A-0036135

To find opportunity, choose an existing account

Cancel

Convert

3. Click on **Convert** button

The below page will be displayed which will display the associated account, contact and opportunity record

Your lead has been converted

🚩

ACCOUNT

**Test Account**

Address: [United States](#)

Website: [test@test.com](mailto:test@test.com)

Account Owner: [Colin Luke](#)

Phone:

Rep Code:

CONTACT

**Test Lead 15.10.2020**

Title:

Account Name: [Test Account](#)

Phone:

Email:

Mobile:

OPPORTUNITY

**Test-opportunity**

Account Name: [Test Account](#)

Close Date: 11/18/2020

Estimated Booking:


Opportunity Owner: [Colin Luke](#)

New Task


Go to Leads

User can check the “Don’t Create Opportunity Upon Conversion” checkbox, so that no opportunity is created upon converting the lead. The below mentioned screen is displayed in this case.

Your lead has been converted



ACCOUNT

 **Test**

Address: [United States](#)


Website:

Account Owner: [Carl Smajda](#)

Phone:

Rep Code:

CONTACT

 **Test Lead**

Title:

Account Name: [Test](#)

Phone:

Email:

Mobile:

[New Task](#)
[Go to Leads](#)

## 6.6 Disqualify a Lead

1. Search and open a lead that needs to be disqualified.
2. On the Leads details page, click on edit pencil icon beside the field **Status**.
3. Select the option Disqualified from the drop down
4. Click on **Save** button

New

Working

Disqualified

Converted

✔ Mark Status as Complete

**DETAILS** ACTIVITY

▼ Lead Information

**\*Lead Status**

New ▼

Lead Owner

Carl Smajda

**\*Name**

Salutation

--None-- ▼


First Name

Mobile Name

Lead Source


Cancel


Save

 **Files (0)** Add Files

Upload Files

Or drop files

 **Open Activities (0)** New Task New Event

 **Activity History (0)** Send an Email

On the Status bar displayed above, the status ‘Disqualified’ is highlighted and the first two statuses ‘New’ and ‘Working’ are highlighted in green with a tick mark.

✓

✓

Disqualified

Converted

✓ Mark Status as Complete

DETAILS

ACTIVITY

Lead Information

Lead Status

Disqualified

Name

Test Lead

Title

Lead Owner

Carl Smajda

Lead Source

Rating

Files (0)

Add Files

Upload Files

Or drop files

Open Activities (0)

New Task

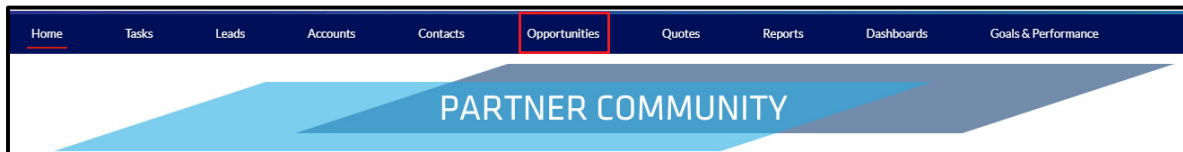
New Event

## 7. OPPORTUNITY

Opportunities are deals that are in progress or those closed (won/lost). Opportunity records in salesforce track details about deals that are actively pursued by sales reps; details include, end user account, buying entity, competitors, products, negotiated values, and team members/contact roles.

### 7.1 Search for an Opportunity

1. Navigate to Leads tab on salesforce homepage.



List of recently viewed opportunities will be displayed

The image shows the 'Recently Viewed' section of the Salesforce Opportunities page. It displays a list of 22 items, updated a few seconds ago. The list has columns for Opportunity Name, Account Name, Stage, Close Date, and Opportunity Owner. The first five items are visible in the table.

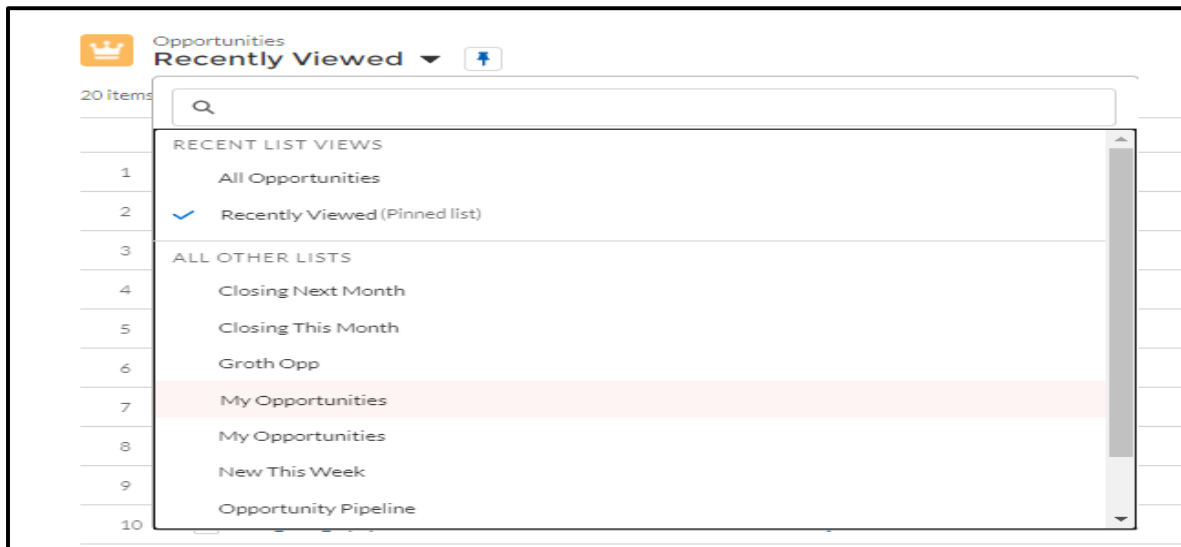
|   | Opportunity Name                                    | Account Name                                 | Stage                | Close Date | Opportunity... |
|---|---|--|----------------------|------------|----------------|
| 1 | <a href="#">Test-opportunity</a>                    | <a href="#">Test Account</a>                 | Discovery/Identified | 11/18/2020 | cluke          |
| 2 | <a href="#">Test_Opty_Girish_1006</a>               | <a href="#">Test_CX_Acc_Girish</a>           | Discovery/Identified | 7/10/2020  |                |
| 3 | <a href="#">Test Opportunity Apoorva 11.09.2020</a> | <a href="#">Test Partner Account Apoorva</a> | Discovery/Identified | 10/11/2020 | cluke          |
| 4 | <a href="#">07/07/20 Can Carl/Collin see this</a>   | <a href="#">A P I Pipe &amp; Supply</a>      | Discovery/Identified | 8/6/2020   |                |
| 5 | <a href="#">RV_Test_Opty1805</a>                    | <a href="#">QA-Account-1</a>                 | In Review            | 6/17/2020  |                |

2. To search for an already existing opportunity, user can enter the opportunity name in the search box.

The image shows the 'Recently Viewed' section of the Salesforce Opportunities page with a search filter applied. The search box contains the text 'Test'. The list now displays 20 items, updated a few seconds ago. The first four items are visible in the table.

|   | Opportunity Name                                    | Account Name                                 | Stage                | Close Date | Opportunity O... |
|---|---|--|----------------------|------------|------------------|
| 1 | <a href="#">Test Opportunity Apoorva 11.09.2020</a> | <a href="#">Test Partner Account Apoorva</a> | Discovery/Identified | 10/11/2020 | cluke            |
| 2 | <a href="#">Test_Opty_Mahi_03062020</a>             | <a href="#">Test_Account_Mahi_20052020</a>   | Discovery/Identified | 7/3/2020   | cluke            |
| 3 | <a href="#">Demo to Chris - New Opty</a>            | <a href="#">Demo to Chris 01</a>             | In Review            | 6/9/2020   | cluke            |
| 4 | <a href="#">Test_Opty_Girish_1006</a>               | <a href="#">Test_CX_Acc_Girish</a>           | Discovery/Identified | 7/10/2020  |                  |

3. Change the filter as per requirement to search for the opportunity for respective category



## 7.2 Creation of an Opportunity

1. Click on **New Opportunity** button



2. Enter the details required for creation of Opportunity and click on **Save** button

### Create Opportunity

|   |   |
|---|---|
| <p><b>* Opportunity Name</b></p> <input type="text" value="Test Opportunity 29.10.2020"/> | <p><b>* Brand</b></p> <input type="text" value="Groth"/>  |
| <p><b>Account Name</b></p> <p>Test</p>  | <p><b>* Sales Rep (Rep Code) Account</b></p> <input type="text" value="Tri-State Tech - Baltimore   F4"/> |
| <p><b>* Customer Contact</b></p> <input type="text" value="Test Contact_0709"/>           | <p><b>* Shipping Account</b></p> <input type="text" value="Tri-State Technical Sales Corp"/>              |
| <p><b>* Close Date</b></p> <input type="text" value="1/27/2021"/>                         | <p><b>* End User Account</b></p> <input type="text" value="Test"/>  |
| <p><b>* Stage</b></p> <input type="text" value="Discovery/Identified"/>                   | <p><b>* End Use Application</b></p> <input type="text" value="Test"/>                                     |
| <p><b>* OEM</b></p> <input type="text" value="Yes"/>                                      | <p><b>* Quote Type</b></p> <input type="text" value="Commission"/>  |
| <p><b>* Type</b></p>  | <p><b>* Customer Currency</b> ⓘ</p>   |

Opportunity Name, Brand, Sales Rep (Rep Code), Customer Contact, Shipping Account, Close Date, End User Account, Stage, End Use Application, OEM, Quote Type, Type, Customer Currency, Project, Estimated Booking, EPC Firm Involved, Market fields are required to create a new opportunity

An error message is displayed when no value is entered/selected in above mentioned fields

## Create Opportunity

Review the errors on this page.

These required fields must be completed: Estimated Booking, Brand, Customer Contact, EPC Firm Involved, End Use Application, End User Account, Is it a Project?, Market, Opportunity Name, OEM, Sales Rep (Rep Code) Account, Shipping Account, Type

---

**\* Opportunity Name**

Complete this field.

Account Name  
Test

**\* Brand**

--None--
▼

Complete this field.

**\* Customer Contact**

🔍

Complete this field.

**\* Sales Rep (Rep Code) Account**

🔍

Complete this field.

**\* Shipping Account**

🔍

Complete this field.

Cancel

Save

### 7.3 Edit an Opportunity

1. Click on **Edit** button

Opportunity  
**Test Opportunity 19.10.2020**

+ Follow

Edit

New Quote

Clone

▼

Account Name  
[Test Account 14.10.2020](#)

Close Date  
11/18/2020

Estimated Booking  
USD 1,000.00

Opportunity Owner  
 [Colin Luke](#)

2. Make necessary changes and click on **Save** button



### Edit Test Opportunity 19.10.2020

\* Opportunity Name

Test Opportunity 19.10.2020

Opportunity Owner

Colin Luke

\* Account Name

Test Account 14.10.2020

×

Sales Rep (Rep Code) Account

Setpoint - Baton Rouge | LA3

×

\* Customer Contact

Test Lead 15.10.2020

×

District\*

AMERICAS

\* EPC Firm Involved

No

Region\*

D02

\* Type

\* Brand

Cancel

Save & New

Save

#### 7.4 Clone an Opportunity

Cloning a allows the User to add an Opportunity that is similar to an existing Opportunity. Cloning saves users from multiple keystrokes and time.

1. Click on **Clone** button

Opportunity

Test Opportunity 19.10.2020

+ Follow

Edit

New Quote

Clone

Account Name

Close Date

Estimated Booking

Opportunity Owner

Test Account 14.10.2020

11/18/2020

USD 1,000.00

Colin Luke

Opportunity creation page will appear will contain all the details same as the Opportunity from which it is being cloned.

2. User can also make the changes to the fields
3. Click on **Save** button once details are entered/ confirmed

### New Opportunity

#### Opportunity Information

\* Opportunity Name

Test Opportunity 19.10.2020

\* Account Name

Test Account 14.10.2020

×

\* Customer Contact

Test Lead 15.10.2020

×

\* EPC Firm Involved

Opportunity Owner  
Colin Luke

Sales Rep (Rep Code) Account

Setpoint - Baton Rouge | LA3

×

\* Brand

Groth

\* Close Date

Cancel

Save & New

Save

## 7.5 Create a Quote to an Opportunity

1. Click on **New Quote** button to create a new quote to the current opportunity

Opportunity

Test Opportunity 19.10.2020

+ Follow

Edit

New Quote

Clone

▼

Account Name

Test Account 14.10.2020

Close Date

11/18/2020

Estimated Booking

USD 1,000.00

Opportunity Owner

Colin Luke

A success message will appear, and user will be directed to Quotes details page.

All the Quote related functionalities- Quote Lines, Approvals, etc are covered in **QUOTES** section

## 7.6 Related Records

All the records associated with the Opportunity are displayed on the right of the screen in separate sections as shown below. User can create new records in each section by clicking on the dropdown icon.

DETAILS

ACTIVITY

Opportunity Name

Test Opportunity Apoorva

11.09.2020

Opportunity Owner

Carl Smajda

Account Name

Tri-State Technical Sales Corp

Sales Rep (Rep Code) Account

Tri-State Tech - Philadelphia | F2

Customer Contact

Alvin Cruz

District\*

AMERICAS

EPC Firm Involved

Yes

Region\*

D01

Type

Existing Business

Brand

Groth

End Use Application

Test

Close Date

10/11/2020

End User Account

Air Products & Chemicals

Stage

Discovery/Identified

Shipping Account

Air Products & Chemicals

Probability (%)

10%

Quotes (1)

Refresh Prices

| Quote Nu... | Total Amou... | Status  | Primary                  |
|-------------|---------------|---------|--------------------------|
| Q-00752     | USD 119.9...  | Blocked | <input type="checkbox"/> |

View All

Con... (1)

Add Contact Roles

Edit Contact Roles

| Contact ... | Role         | Title          | Primary                             |
|-------------|--------------|----------------|-------------------------------------|
| Alvin Cruz  | Customer ... | Inventory S... | <input checked="" type="checkbox"/> |

View All

Notes (0)

Files (0)

Add Files

Discovery Completed

☐

OEM

Yes

ROI Analysis Completed

☐

Market

Oil and Gas Upstream

Budget Confirmed

☐

Submarket

Quote Total Amount

USD 0.00

Third Tier

Loss Reason

Quote Details

Quote Number

Prototype / Sales Sample

Quote Type

Commission

Additional Information

Next Step

Lead Source

Open Activities (0)

New Task

New Event

Activity History (0)

Send an Email

Add Account Team

Add Opportunity Team Members

| Team Member | Member Role |
|-------------|-------------|
| Carl Smajda | Sales Rep   |

View All

Opportunity Pipeline (0)

Note that the preferred method of Quote creation is through New Quote button. Craetion of Quote through related box will create a quote without setting the default values.

## 7.7 Opportunity Stages

Opportunity

Test Opportunity 19.10.2020

+ Follow

Edit

New Quote

Clone

Account Name

Test Account 14.10.2020

Close Date

11/18/2020

Estimated Booking

USD 1,000.00

Opportunity Owner

Colin Lu...

>

Discovery/Identified

Solution Design

In Review

Approved (Quote)

Order Submitted

Closed

✓ Mark Stage as Complete

### Opportunity Stage changes based on Quote Statuses

- All Opportunities start with **Discovery/Identified** status.
- If primary quote on Opportunity is in **Pending Approval** status, Opportunity is set to **In Review**
- If primary quote is **Approved**, Opportunity need to be set to **Approved (Quote)**.
- **Order Submitted** on Quote to map to **Order Submitted** on Opportunity.
- When we get order # back from IFS on quote, opportunity status to be set to **Closed**.
- **Lost** opportunities will be manually set by users.

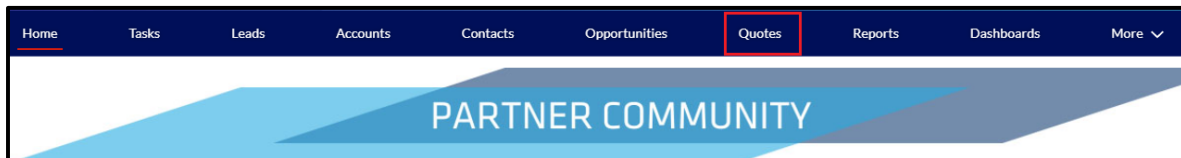
## 8. QUOTES

A Quote contains all the details Commissions, Pricing and Financials, Order Details, Approvers, shipping details etc

The Quote values are defaulted from the opportunity through which it is created.

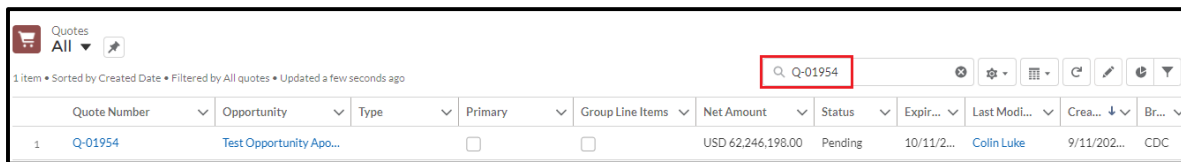
### 8.1 Search for an Existing Quote

1. Navigate to Quotes tab on salesforce homepage.

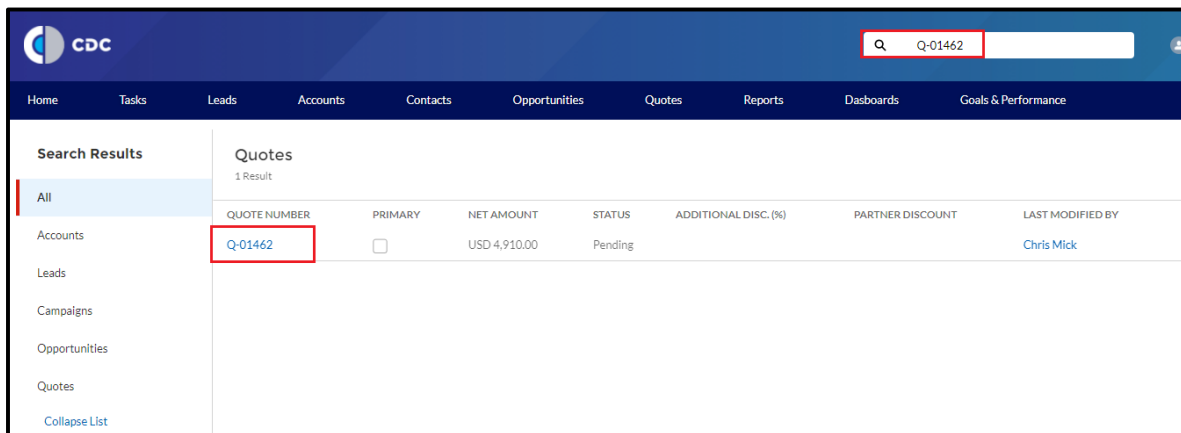


List of recently viewed Quotes will be displayed

2. To search for an already existing account, user can enter the Quote Number in the search box.

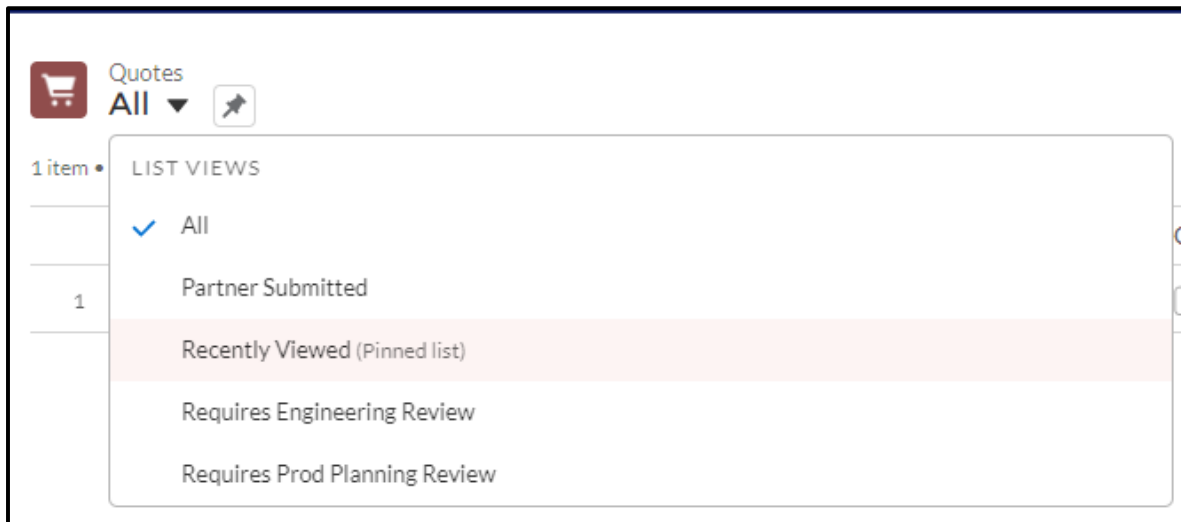


Alternatively, user can enter the Quote Number in the Global Search bar.



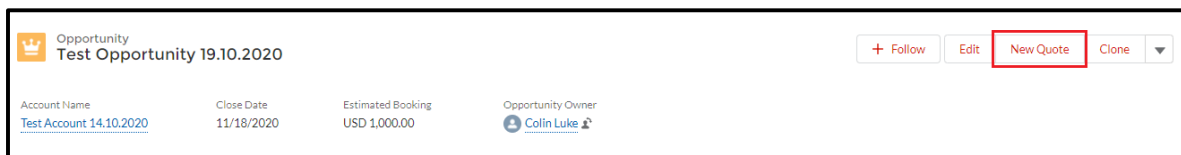
Click on the required **Quote Number** from **Quotes** section.

3. Change the filter as per requirement to search for the Quote Number for respective category



## 8.2 Creation of a Quote

1. Open an existing Opportunity record.
2. Click on **New Quote** button to create a new quote to the current opportunity

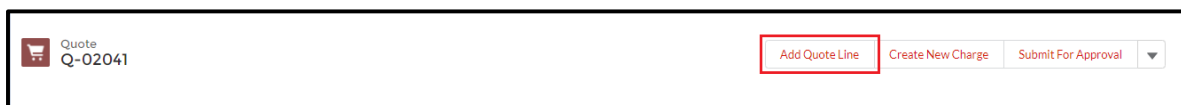


A success message will appear, and user will be directed to Quotes details page.

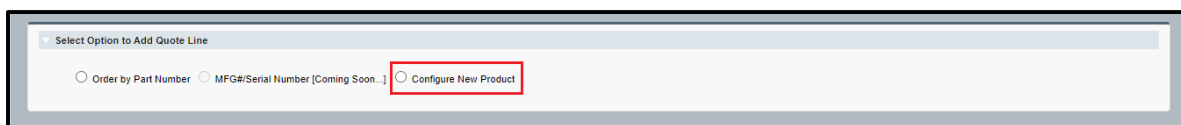
## 8.3 Quote Related Actions

### 8.3.1 Add Quote Line

1. Click on Add Quote Line button present on Quote details page.

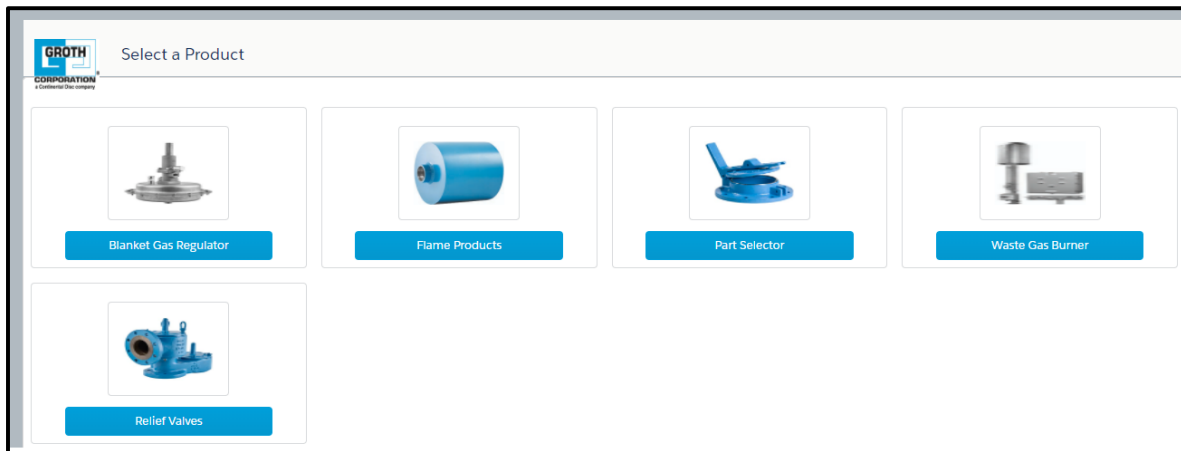


2. Select **Configure New Product** option to configure the Quote Line (Order by Part Number and MFG#/Serial Number are associated with reordering Quote Line)



3. Select a Product by clicking on the image.

Note that the products displayed on this page are based on the brand selected in opportunity.



**Note:** Refer to configurator guide to find steps to add quote line and configure a product.

User will be directed to **Product Configuration** page of the product selected.

The Partner User can perform the below mentioned actions for a Quoteline:

- Change the Line Status
- Add Comments and request for technical assistance
- Request for shorter Lead time
- Add charges
- Discounts
- Review the Pricing and Commission Information

1. To change the status of the line item, navigate to the Quote Line details page
2. Click on the Edit icon present for **Line Status** field
3. Select the required Line status from the drop down and click on Save button

DETAILS

ACTIVITY

Line Name

QL-0002955

QuoteLineNumber

1

Quote Line Number

QL-0002955

Line Status

Primary

--None--  
✓ Primary  
Alternate  
Removed

Sourcing Entity

Stafford

Sourcing Options

--None--

Quote

Q-01057

Brand

Groth

Delivery Number

1

Number

1

Line Number (IFS Override)

Drop Ship

#N/A

Currency

USD - U.S. Dollar

Customer's Part No.

Cancel

Save

Partner user can also request for a Technical Assistance for a Quoteline

1. Click on the Settings icon
2. Select the option Technical Assistance

Details

Related

Quote Line Items

Activity

| Action  | Line Name  | Quantity | Product Name  | Customer Currency | Total List Price (Cust. Curr) | Discount. (%) | Discount Amount | Net Price Each (Cust Curr) | Ext Net Price (Cust Curr) | Leadtime |
|---|------------|----------|---------------|-------------------|-------------------------------|---------------|-----------------|----------------------------|---------------------------|----------|
| <div> <div>⚙</div> <div>🖨</div> <div>↺</div> </div> <div> Configure<br/> Output<br/> <b>Technical Assistance</b><br/> Production Planning<br/> Pricing &amp; Commissions<br/> Order Entry<br/> Update Status </div> | QL-0002955 | 1        | Relief Valves | USD               | 7460                          | 0.0%          | 0               | 7460                       | 7460                      | 30       |

3. Select the option "Yes" in Requires Technical Review field.

Technical Assistance

Line Name

QL-0002955

Requires Technical Review

--None--

✓ --None--

Yes

No

Engineering Notes

Drawings Status

--None--

Cancel

Update

4. Add Review Comments and select a drawing status
5. Click on Update button



### Technical Assistance

Line Name  
QL-0002955

Requires Technical Review  
Yes

Technical Review Comments  
This Quote Line requires technical assistance

Engineering Notes

Drawings Status  
Requested

Cancel
Update

| Quote Q-01057 <span style="float: right;">+ Follow Initiate Change Order</span> |                           |          |                   |             |                 |                 |                           |                    |                    |      |                       |
|---|---------------------------|----------|-------------------|-------------|-----------------|-----------------|---------------------------|--------------------|--------------------|------|-----------------------|
| Details Related <b>Quote Line Items</b> Activity                                |                           |          |                   |             |                 |                 |                           |                    |                    |      |                       |
| Cust Curr   | Ext Net Price (Cust Curr) | Leadtime | Customer Leadtime | PP Leadtime | Expiration Date | Drawings Status | Requires Technical Review | Engineering Status | Requires PP Review | Size | Part Number           |
|   | 7460                      | 30       |                   |             | Dec 7, 2020     | Requested       | Yes                       | Yes                | No                 | 04   | V1200A0004555TQA00002 |

The quote is sent to engineering user for Approval

Partner users can also request for a shorter lead time or discount by entering the value in Customer Leadtime (for Lead Time) or Discount (%) – in case of requesting for discount for a Quote Line in which case the quote would require approval

| Details Related <b>Quote Line Items</b> Activity |            |          |               |                   |                               |               |                 |                            |                           |          |                   |
|--|------------|----------|---------------|-------------------|-------------------------------|---------------|-----------------|----------------------------|---------------------------|----------|-------------------|
| ion  | Line Name  | Quantity | Product Name  | Customer Currency | Total List Price (Cust. Curr) | Discount, (%) | Discount Amount | Net Price Each (Cust Curr) | Ext Net Price (Cust Curr) | Leadtime | Customer Leadtime |
| +  | QL-0002955 | 1        | Relief Valves | USD               | 7460                          | 15.0%         | 0               | 7460                       | 7460                      | 30       | 15                |


Click on Save button after entering the Customer Lead time or Discounts

To Review the Pricing and Commission details, navigate to Quote line details page. The Pricing details will be available from Pricing Information section of Quote details page.

|  |                         |
|--|-------------------------|
| Ext. Net Price (Cust. Curr)                              | 7,460.00                |
| Customer Currency  | USD                     |
| Adjusted Commission %                                    | 20.00%                  |
| Conversion Rate  | 1.00                    |
| International Lead Time Adder                            | 0                       |
| <div> <div> </div> <div>Pricing Information</div> </div> |                         |
| List Unit Price ⓘ  | USD 7,460.00            |
| Net Unit Price ⓘ   | USD 7,460.00            |
| Regular Unit Price ⓘ                                     | USD 7,460.00            |
| Discount. (%)  | 0.00%                   |
| List Total ⓘ   | USD 7,460.00            |
| Net Total ⓘ  | USD 7,460.00            |
| Regular Total ⓘ  | USD 7,460.00            |
| Discount Amount  | USD 0.00                |
| Total Discount (Amt) ⓘ                                   | USD 0.00                |
| Description ⓘ  | Model: 1200A-04-555-TOZ |

### 8.3.2 Create New Charge

1. Click on the **Create New Charge** button present on Quote page

|  |   |
|--|---|
|  <div>Quote<br/>Q-02043</div> | <div> <div>Add Quote Line</div> <div>Create New Charge</div> <div>Submit For Approval</div> <div>▼</div> </div> |
|--|---|

2. Fill in the **Type** of Charge, **Quantity** and **Amount**
3. Click on Save button

### Create New Charge

|   |  |
|---|--|
| Type<br><div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Field Service ▼</div>         | Parent Quote<br>Q-02043  |
| Quantity<br><div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">5</div>                   | Amount<br><div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">1,000.00</div> |
| Currency<br><div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">USD - U.S. Dollar ▼</div> |  |

Cancel
Save

### 8.3.3 Quote Attachment

Sales User has many documents that he needs to attach for a Quote to become an Order.

1. Click on **Quote Attachment** option

Quote  
Q-01933

Revise Approval
Quote Attachment
Change Record Type

2. Select Document Class from the dropdown.

Document Class description is a non-editable field and will automatically pop up based on Document Class selection.

3. Upload necessary files and click on Next button

### Quote Attachment

Document Class  

SALES-100 (Customer Quotes) ▼

Document Class Description  

Customer Quotes ▼

Quote Attachment  

Upload Files

Or drop files

Next

### 8.3.4 Submit for Approval

Once the Quote Line is configured, the partner user can submit the Quote for Approval by clicking on **Submit for Approval** button.



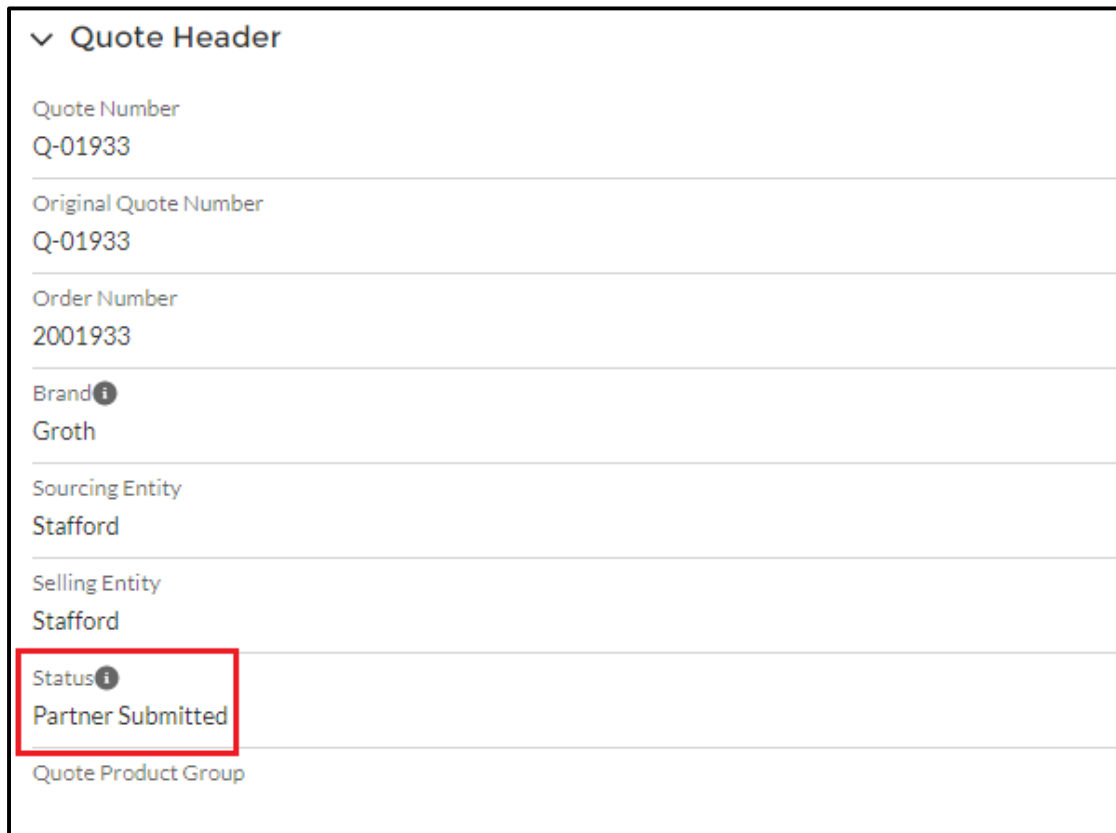
Quote  
Q-01933

Add Quote Line Create New Charge **Submit For Approval** ▼

The Quote status is now changed to **Partner Submitted** if additional approvals or assistance is needed.

If the quote does not need assistance, the status of the quote will transition to “Approved”

If the Quote requires Approval, the further process of Approval will be initiated by the Inside Sales user.



Quote Header

Quote Number  
Q-01933

Original Quote Number  
Q-01933

Order Number  
2001933

Brand ⓘ  
Groth

Sourcing Entity  
Stafford

Selling Entity  
Stafford

Status ⓘ  
**Partner Submitted**

Quote Product Group

### 8.3.5 Revise Approval

Partner user can revise the Approval process in case if any changes are made to the Quote and requires Approvals from the respective Approvers

1. Click on **Revise Approval** button from Quote details page.

Quote  
Q-01933

Revise Approval

Quote Attachment

Change Record Type

The Quote Status will be changed to Pending

▼

Quote Header

Quote Number

Q-01933

Original Quote Number

Q-01933

Order Number

2001933

Brand ⓘ

Groth

Sourcing Entity

Stafford

Selling Entity

Stafford

Status ⓘ

Pending

Partner ⓘ

### 8.3.6 Quote to Order Conversion

1. Partner user opens an Approved Quote

Quote  
Q-01207

+ Follow

Quote Attachment

Revise Approval

Cancel Order/Order Line ▼

Details

Related

Quote Line Items

Activity

▼

Quote Header

Quote Number

Q-01207

Original Quote Number

Q-01207

Order Number

2001207

Brand\*

Groth

Sourcing Entity

Stafford

Selling Entity

Stafford

Status ⓘ

Approved

Primary ⓘ

☒

Account ⓘ

[Tri-State Technical Sales Corp](#)

Customer Contact

[Dave Yusko](#)

Rep Code

Tri-State Tech - Philadelphia | F2

Project Coordinator

Opportunity ⓘ

[UAT 1.3.3.6.7.1](#)


Primary Contact ⓘ

[Dave Yusko](#)

2. Enter **Customer PO Number** in **Order Details** section

| Order Details                 |   |
|-------------------------------|---|
| Order Type                    | Status Code<br>A  |
| Order Priority ①              | Reference Number  |
| Ordering Region<br>Domestic 1 | Backorder Option  |
| Key ①<br>Q-01207A5            | Customer's PO Number<br><b>12415</b>                                |
|                               | IFS Order Status<br>Not Submitted                                   |
|                               | Customer Approval Req. Before Shipment?<br><input type="checkbox"/> |
|                               | Tax Code<br>SF  |

3. Save the record
4. Attach the Purchase Order by clicking on **Quote Attachment** button

|  |   |
|--|---|
|  Quote<br>Q-01207 | <a href="#">+ Follow</a> <a href="#">Quote Attachment</a> <a href="#">Revise Approval</a> <a href="#">Cancel Order/Order Line</a> |
|--|---|


5. Select **(Sales 120) Customer Purchase Order** as **Document Class**

### Quote Attachment

Document Class

Document Class Description

Quote Attachment  



Or drop files

6. Upload the required files
7. Check **Start Quote-to Order Process** checkbox.

### 8.3.7 Change Order

This is a process that supports the customer's need to update an order which has already been placed. The change order process is a "request process" in which the Partner org user starts the "change order/order revision" process through a list of selections, data input to support the change and selection of supporting information to help the internal team support a change request from the customer

The change order process will depend on the status of the order in IFS and the type of change (commercial or configuration).

**Commercial changes** are those that do not affect how the product is manufactured. These changes will be synced into IFS as incremental changes to the customer order. Examples include changing the ship via or changing commission splits.

**Configuration changes** are those that do affect how the product is made. Examples include changing the qty of a line item or changing the wanted delivery date of a line item, etc., If the product needs to be reconfigured, then the quote line should be cancelled and a new line added. The status of the IFS order determines how the change order will be managed.

The change order process will begin with the partner users. Partners will submit a request to change with the details of what is to be changed.

If an order status has not been passed back from IFS, Salesforce will assume the order is in a **Planned** status. When in a Planned status, commercial changes will be made by the user on the existing quote. These changes will then be sent to IFS by syncing the order again.

For configuration changes to an order in a Planned status, user will Cancel the order by sending cancel message from Salesforce to IFS. User will then initiate the Change Order process in Salesforce. The change order process will clone the quote and quote lines. User will revise the cloned quote as needed. Then, this quote will go through the standard quote approval process. Once the cloned quote is in the Approved status, the user will sync order to IFS.

If the order status in IFS is anything but Planned, then the user must first decide if the order or order line will be blocked while processing the change order. If the order or order line are to be blocked, then the status will be synced to IFS at time of cloning the quote.

User will then initiate the Change Order, cloning the quote and quote lines. User will make the commercial and configuration changes to the quote and submit the quote for approval. Changes will be tracked using Salesforce's standard audit trail. CDC will select up to 25 fields to include in this audit trail. These changes will be captured in the change order reason field on the cloned quote.


Commercial changes will go through the standard commercial approval process.

Any changes that affect the value of the order must be captured as a booking adjustment. The amount of the adjustment (positive or negative) will be a booking adjustment on the date the change order is submitted to IFS.

Change Order is only available when quote status is Order Submitted or Change Order.

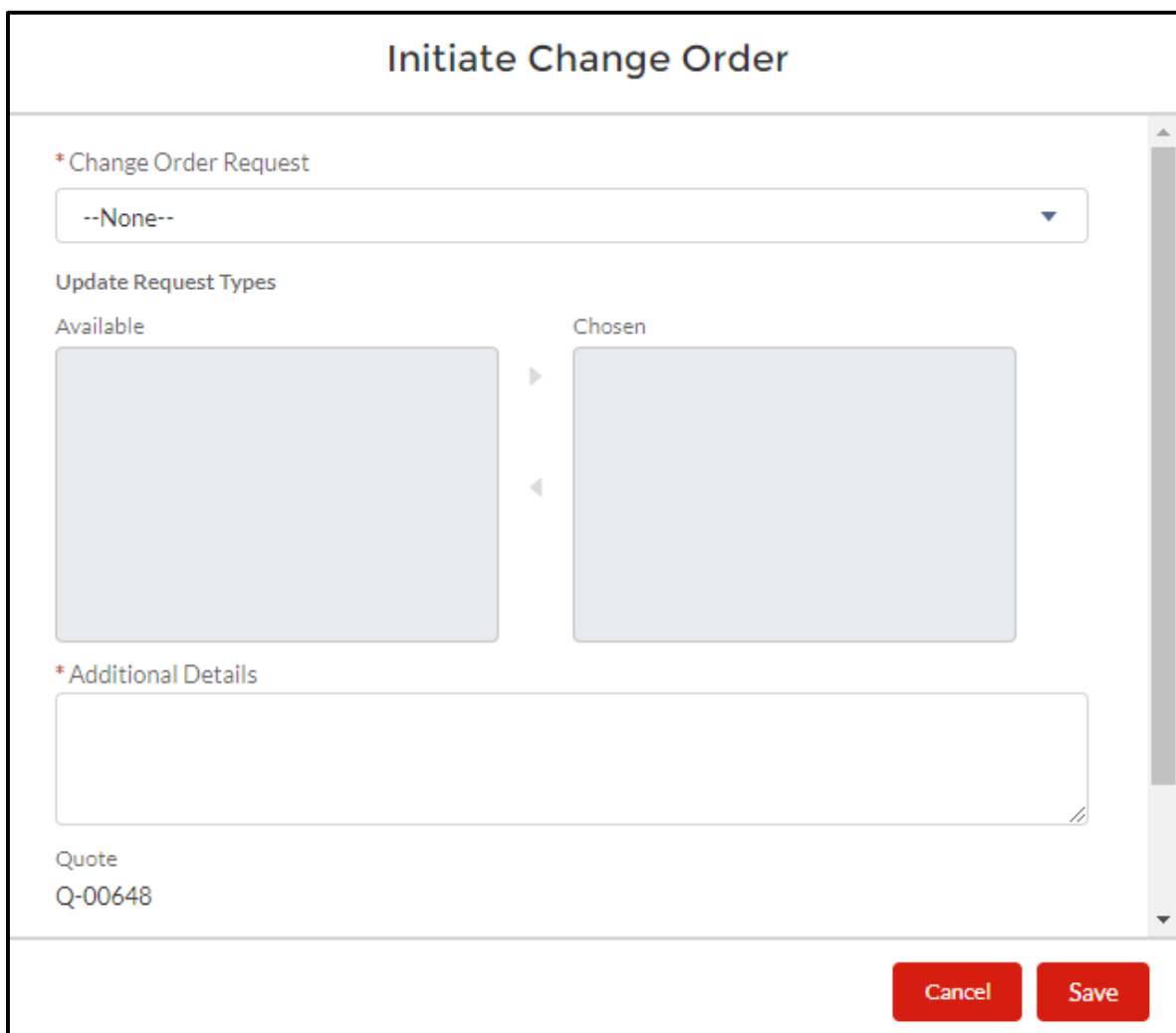
To initiate the change order process, Partners will submit a request to change with the details of what is to be changed.

1. Click on **Initiate Change Order** button



2. Initiate the change order process by entering the **Change order request**

Note: The Available Request is dependent on the value chosen on **Change order request** field



The change Order request are of two types:

- Update Order
- Cancel Order



## Initiate Change Order

\* Change Order Request

--None--

✓ --None--

Update Order

Cancel Entire Order

\* Additional Details

Quote

Q-01057

### Update Order:

1. Select the option "Update Order" in **Change Order Request** field
2. Select a request from **Available** section
3. Click on the arrow to confirm the request to be chosen
4. Add the additional details
5. Click on **Save** button

### Initiate Change Order

**\* Change Order Request**

Update Order

**\* Update Request Types**

**Available**

Halt Current Production Process (Bl...

Commercial Update of Active Order

**Product Update of any kind for an e...**

**Chosen**

Adjust Charges

**\* Additional Details**

Update Charges|

Quote  
Q-01057

Cancel
**Save**

A success message is displayed on top of the page

✓ Change Order Request COR-000003 was created.
✕

Home
Tasks
Leads
Accounts
Contacts
Opportunities
Quotes
Reports
Dashboards
Goals & Performance

#### Cancel Entire Order:

6. Select the option "Cancel Entire Order" in **Change Order Request** field
7. Select a request from **Available** section
8. Click on the arrow to confirm the request to be chosen
9. Add the additional details
10. Click on **Save** button

### Initiate Change Order

\* Change Order Request  
Cancel Entire Order

\* Update Request Types

Available

Cancel Entire Order due to change i...

Chosen

An option must be selected



\* Additional Details  
Cancel the Order

Quote  
Q-01057

Inside Sales User  
Suraj Aluru

Cancel Save

A success message is displayed on top of the page

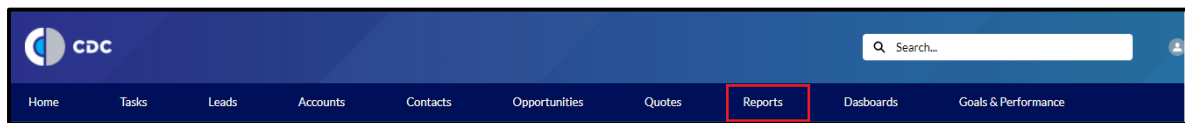
 

Home Tasks Leads Accounts Contacts Opportunities Quotes Reports Dashboards Goals & Performance

## 9. REPORTS AND DASHBOARDS

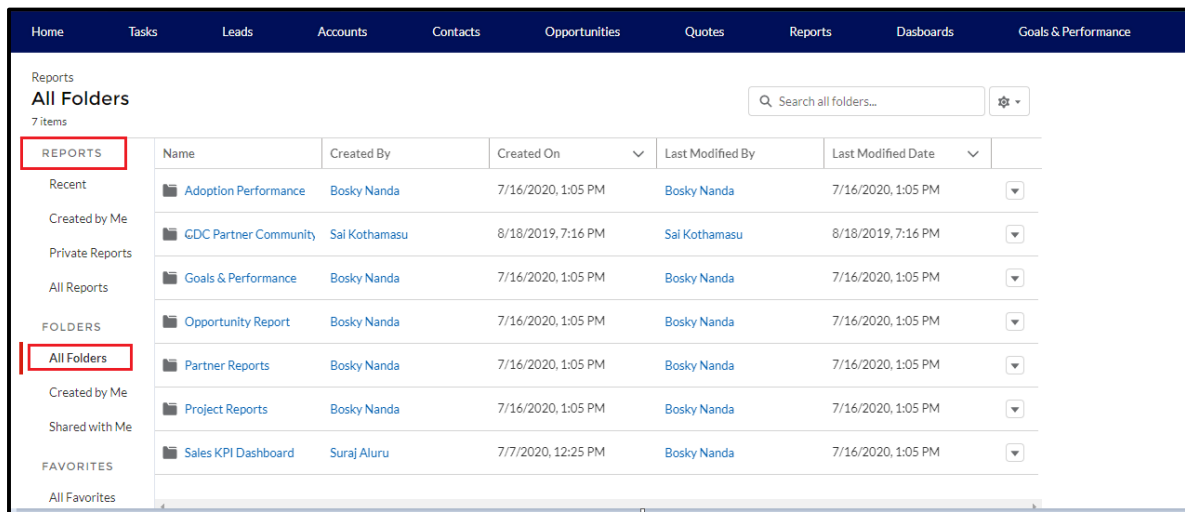
### 9.1 Reports

Navigate to Reports tab

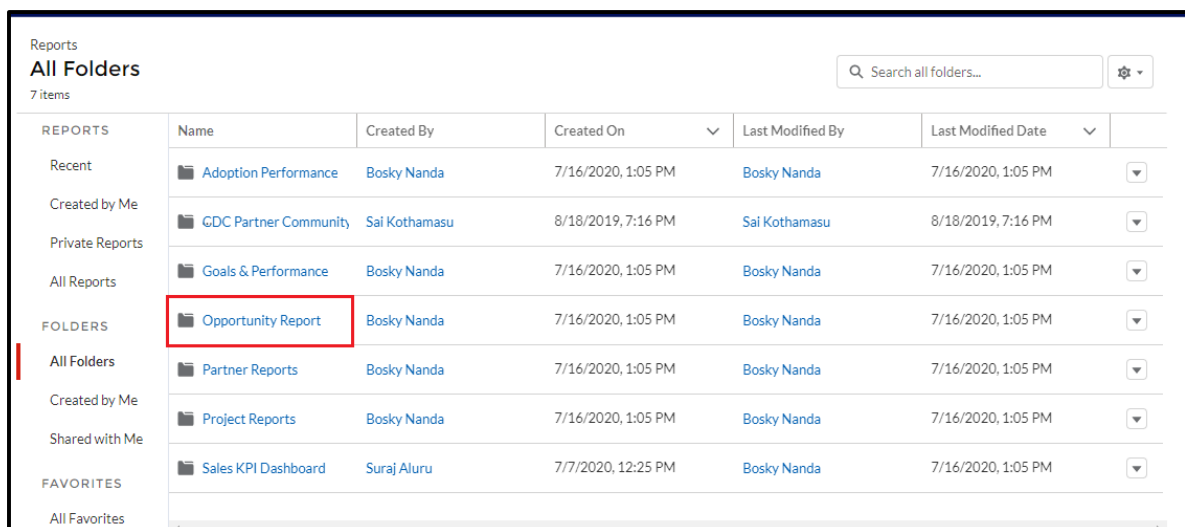


User can select the category of the report from the Report section from left part of the screen. Based on the folder selected the reports are displayed

(Currently the option “All Folders” is selected)

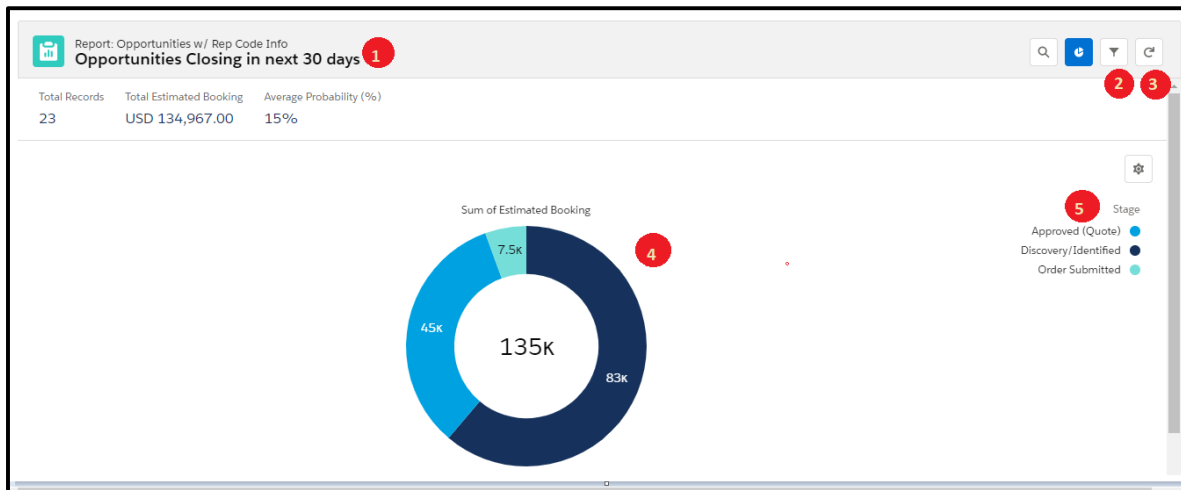


1. Click on the sub-folder.

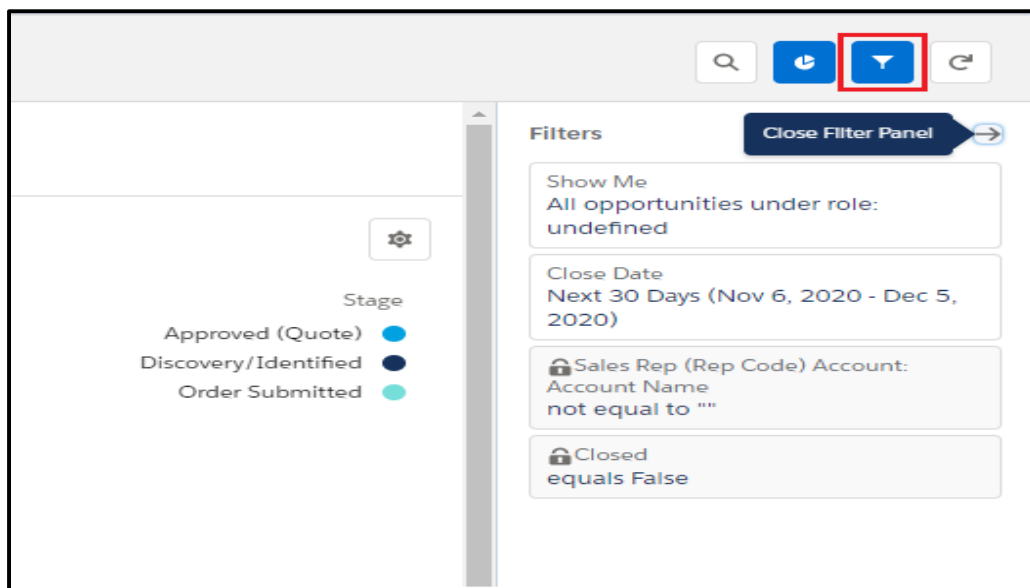


A list of Reports will be displayed

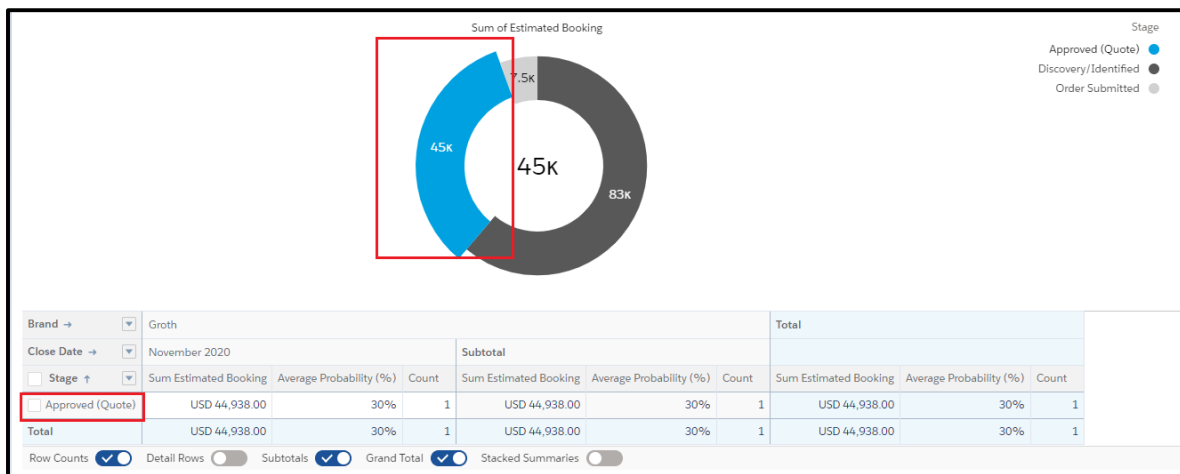
2. Click on the Report name (Currently, **Opportunity Closing in Next 30 Days** report is selected)



- 1- The name of the report is displayed on top of the page. The total records, total estimated bookings and average probability are displayed below the Report name
- 2- User can view the filter criteria through which the values are displayed in the report by clicking on the filter icon



3. Refresh- Clicking on this button refreshes the reports
4. Chart- This is the pictorial representation of the records differentiated by colors for each opportunity Stage. When user clicks on a particular color, the records associated for that particular stage
5. Color Code- A color code is given to each opportunity stage displayed in the chart. When user clicks on a particular color, the records associated for that particular stage



Below the chart is a report that displays the summary of results of the filter

|  |                                      |   |   |  |                         |       |                       |                         |       |                 |
|--|--------------------------------------|---|---|--|-------------------------|-------|-----------------------|-------------------------|-------|-----------------|
| Brand → 6                                      | CDC                                  |   |   |  |                         |       |                       |                         |       | Groth           |
| Close Date →                                   | November 2020                        |   |   | December 2020                              |                         |       | Subtotal              |                         |       | November 2020   |
| Stage ↑ 7                                      | Sum Estimated Booking                | Average Probability (%)                       | Count   | Sum Estimated Booking                      | Average Probability (%) | Count | Sum Estimated Booking | Average Probability (%) | Count | Sum Estimated B |
| <input type="checkbox"/> Discovery/Identified  | USD 15,960.00                        | 10%   | 7   | USD 30,515.00                              | 10%                     | 5     | USD 46,475.00         | 10%                     | 12    | USD 4,0         |
| <input type="checkbox"/> Approved (Quote)      | USD 0.00                             | 0%  | 0   | USD 0.00                                   | 0%                      | 0     | USD 0.00              | 0%                      | 0     | USD 44,9        |
| <input type="checkbox"/> Order Submitted       | USD 0.00                             | 0%  | 0   | USD 0.00                                   | 0%                      | 0     | USD 0.00              | 0%                      | 0     | USD 7,4         |
| Total 8  | USD 15,960.00                        | 10%   | 7   | USD 30,515.00                              | 10%                     | 5     | USD 46,475.00         | 10%                     | 12    | USD 56,4        |
| ◀  |                                      |   |   |  |                         |       |                       |                         |       |                 |
| Row Counts <input checked="" type="checkbox"/> | Detail Rows <input type="checkbox"/> | Subtotals <input checked="" type="checkbox"/> | Grand Total <input checked="" type="checkbox"/> | Stacked Summaries <input type="checkbox"/> |                         |       |                       |                         |       |                 |

6, 7 - User can filter the report by Brand/ Close Date/ Opportunity stage from the left column by clicking on the dropdowns for the respective names

8- This row displays the total of each column

Note that the records displayed in any of the report contains only the records that the partner user is tied to. Any Record outside the Partner org is not visible to the partner user and hence not reflected in the report.

## 9.2 Dashboards

Navigate to Dashboards tab



The below page is displayed

Home
Tasks
Leads
Accounts
Contacts
Opportunities
Quotes
Reports
Dashboards
More

Dashboards

Recent

2 Items

DASHBOARDS

Recent

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

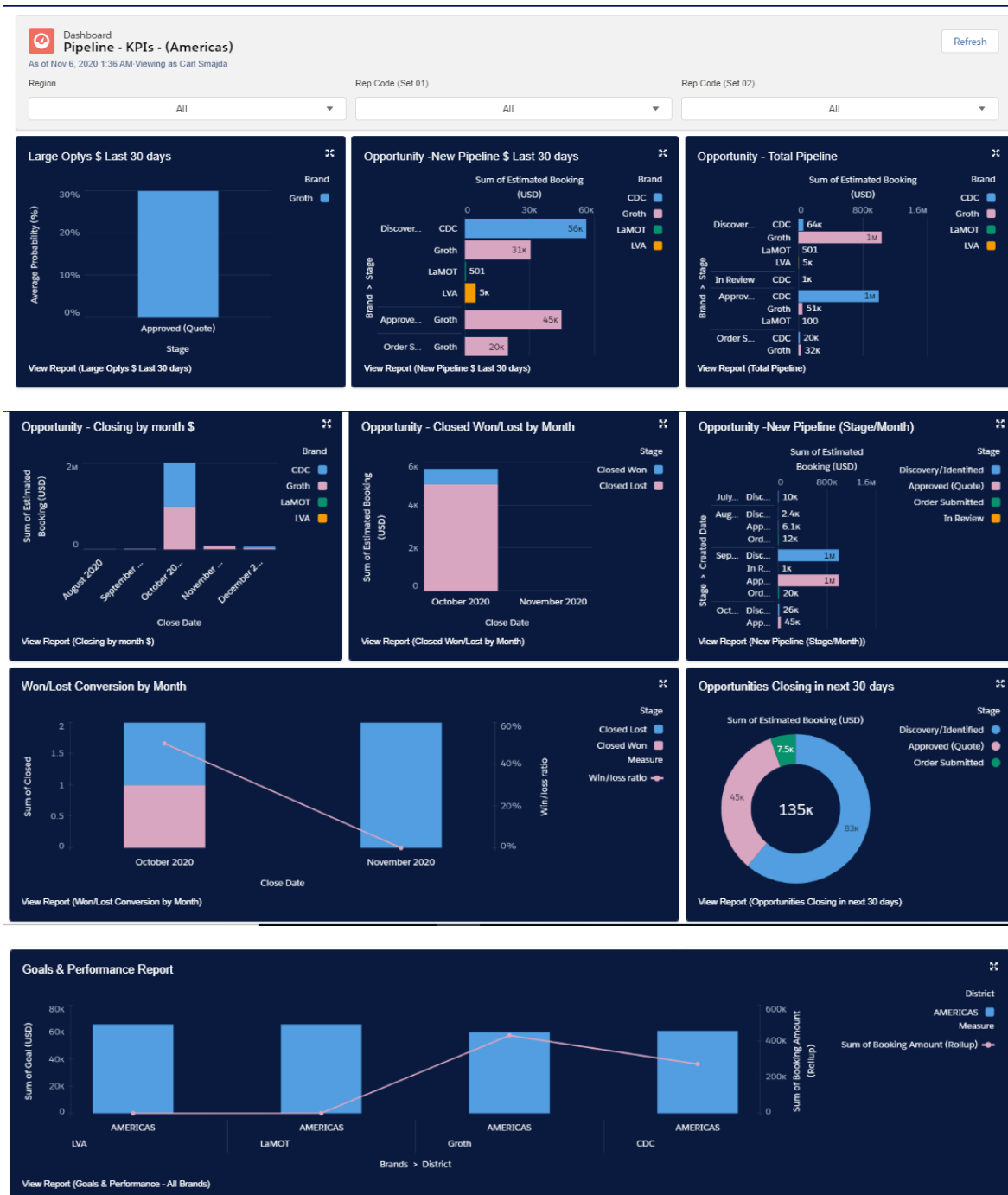
FAVORITES

| Dashboard Name  | Description  | Folder                 | Created By    | Created On      |
|---|--|------------------------|---------------|-----------------|
| Pipeline - KPIs - (Americas)                              | This is a Dashboard that will be accessed by all office rep managers from Partner community to go through their Teams Accounts and Opportunities Details | KPI Dashboard - Pipeli | Suraj Aluru   | 7/23/2020, 3:11 |
| CDC Rep Office Manager - My Team Accounts & Oppurtunities |  | CDC Partner Rep Offic  | Sai Kothamasu | 8/19/2019, 3:11 |
|   |  |                        |               |                 |

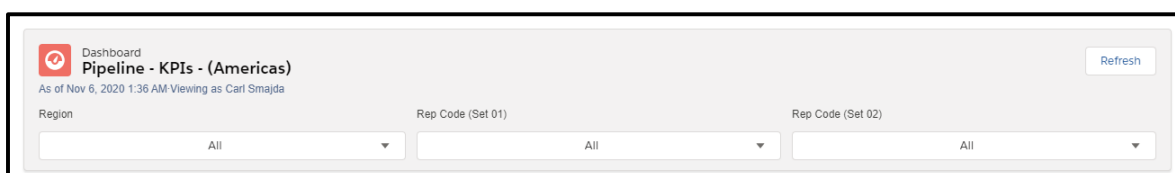
Click on the dashboard name.

The below page will be displayed which contains the infolets for various reports.

Clicking on any of these infolets will direct the user to the respective report.



The topmost section on this page contains a section from which the user can filter out Region and Rep Code. Click on the Refresh button to sync all the changes to the report/dashboard

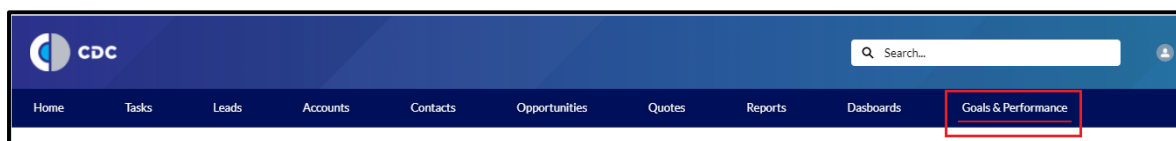




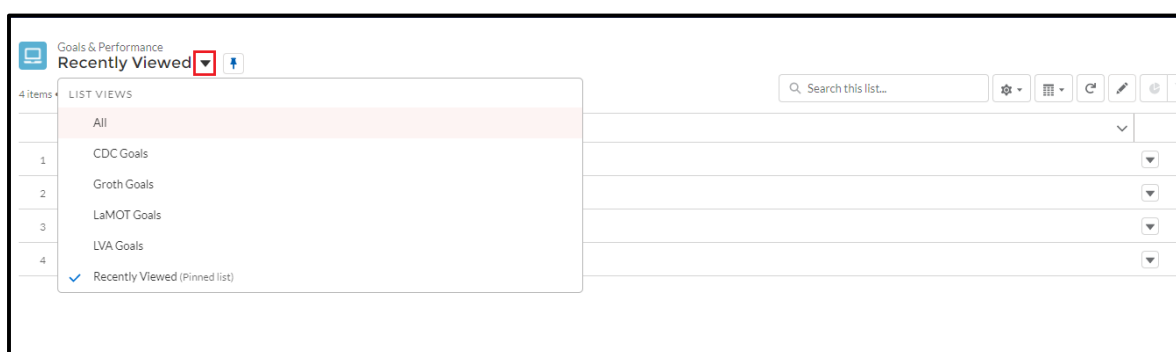
## 10. GOALS AND PERFORMANCE

The Goals and Performance tab and report is specifically designed for CDC Internal Users to check, track and assess the targets and achievements of Partner Representatives.

All the goals are loaded into the system by the internal user for a particular fiscal year, brand and goal amount.



Select a list view the record for a particular brand

A screenshot of the 'CDC Goals' table in the system. The table has 11 columns: 'Goals & Pe...', 'Partner Org', 'Bran...', 'Fisca...', 'Fiscal M...', 'Goal', 'Booking A...', 'Credit ...', 'Variance', and 'Pipeline Amo...'. It displays 10 rows of goal data, each with a checkbox, a goal ID (e.g., GP-02193), a partner organization (e.g., Tri-State Tech - Baltimore | F4), a fiscal year (2020), a fiscal month (e.g., April), a goal amount (e.g., USD 900.00), a booking amount (e.g., 0.00), a credit amount (e.g., 0.00), a variance (e.g., 100.00%), and a pipeline amount (e.g., 0.00). The table is sorted by 'Fiscal Month' and filtered by 'All goals & performance - Brands'. A 'Printable View' button is visible in the top right corner.

|    | Goals & Pe...                     | Partner Org                        | Bran... | Fisca... | Fiscal M... | Goal         | Booking A... | Credit ... | Variance        | Pipeline Amo... |
|----|-----------------------------------|------------------------------------|---------|----------|-------------|--------------|--------------|------------|-----------------|-----------------|
| 1  | <input type="checkbox"/> GP-02193 | Tri-State Tech - Baltimore   F4    | CDC     | 2020     | April       | USD 900.00   | 0.00         | 0.00       | 100.00%         | 0.00            |
| 2  | <input type="checkbox"/> GP-00713 | Tri-State Tech - Philadelphia   F2 | CDC     | 2020     | August      | USD 5,000.00 | 76,289.61    | 0.00       | -1,425.79%      | 1,005,000.00    |
| 3  | <input type="checkbox"/> GP-02078 | Tri-State Tech - Baltimore   F4    | CDC     | 2020     | August      | USD 5,000.00 | 0.00         | 0.00       | 100.00%         | 0.00            |
| 4  | <input type="checkbox"/> GP-02086 | Tri-State Tech - New York   F3     | CDC     | 2020     | August      | USD 5,000.00 | 0.00         | 0.00       | 100.00%         | 0.00            |
| 5  | <input type="checkbox"/> GP-02194 | Tri-State Tech - Baltimore   F4    | CDC     | 2020     | August      | USD 150.00   | 0.00         | 0.00       | 100.00%         | 150.00          |
| 6  | <input type="checkbox"/> GP-02082 | Tri-State Tech - Baltimore   F4    | CDC     | 2020     | September   | USD 5,000.00 | 0.00         | 100.00     | 98.00%          | 11,100.00       |
| 7  | <input type="checkbox"/> GP-02090 | Tri-State Tech - New York   F3     | CDC     | 2020     | September   | USD 5,000.00 | 0.00         | 0.00       | 100.00%         | 0.00            |
| 8  | <input type="checkbox"/> GP-02097 | Tri-State Tech - Philadelphia   F2 | CDC     | 2020     | September   | USD 5,000.00 | 30,839.25    | 0.00       | -516.79%        | 129,250.00      |
| 9  | <input type="checkbox"/> GP-02203 | Tri-State Tech - Philadelphia   F2 | CDC     | 2020     | October     | USD 1.00     | 166,749.73   | 0.00       | -16,674,873.00% | 0.00            |
| 10 | <input type="checkbox"/> GP-02338 | Tri-State Tech - Baltimore   F4    | CDC     | 2020     | October     | USD 6,000.00 | 0.00         | 0.00       | 100.00%         | 0.00            |

Click on the Goals and Performance name to view the details

| Goals & Performance<br>CDC Goals   |  |                                    |        |          |             |              |              |            |                 |                 |
|--|--|------------------------------------|--------|----------|-------------|--------------|--------------|------------|-----------------|-----------------|
| 14 Items • Sorted by Fiscal Month • Filtered by All goals & performance - Brands • Updated a few seconds ago |  |                                    |        |          |             |              |              |            |                 |                 |
|  | Goals & Pe...                            | Partner Org                        | Brn... | Fisca... | Fiscal M... | Goal         | Booking A... | Credit ... | Variance        | Pipeline Amo... |
| 1  | <input type="checkbox"/> GP-02193        | Tri-State Tech - Baltimore   F4    | CDC    | 2020     | April       | USD 900.00   | 0.00         | 0.00       | 100.00%         | 0.00            |
| 2  | <input type="checkbox"/> GP-00713        | Tri-State Tech - Philadelphia   F2 | CDC    | 2020     | August      | USD 5,000.00 | 76,289.61    | 0.00       | -1,425.79%      | 1,005,000.00    |
| 3  | <input type="checkbox"/> GP-02078        | Tri-State Tech - Baltimore   F4    | CDC    | 2020     | August      | USD 5,000.00 | 0.00         | 0.00       | 100.00%         | 0.00            |
| 4  | <input type="checkbox"/> GP-02086        | Tri-State Tech - New York   F3     | CDC    | 2020     | August      | USD 5,000.00 | 0.00         | 0.00       | 100.00%         | 0.00            |
| 5  | <input type="checkbox"/> GP-02194        | Tri-State Tech - Baltimore   F4    | CDC    | 2020     | August      | USD 150.00   | 0.00         | 0.00       | 100.00%         | 150.00          |
| 6  | <input type="checkbox"/> <b>GP-02082</b> | Tri-State Tech - Baltimore   F4    | CDC    | 2020     | September   | USD 5,000.00 | 0.00         | 100.00     | 98.00%          | 11,100.00       |
| 7  | <input type="checkbox"/> GP-02090        | Tri-State Tech - New York   F3     | CDC    | 2020     | September   | USD 5,000.00 | 0.00         | 0.00       | 100.00%         | 0.00            |
| 8  | <input type="checkbox"/> GP-02097        | Tri-State Tech - Philadelphia   F2 | CDC    | 2020     | September   | USD 5,000.00 | 30,839.25    | 0.00       | -516.79%        | 129,250.00      |
| 9  | <input type="checkbox"/> GP-02203        | Tri-State Tech - Philadelphia   F2 | CDC    | 2020     | October     | USD 1.00     | 166,749.73   | 0.00       | -16,674,873.00% | 0.00            |
| 10   | <input type="checkbox"/> GP-02338        | Tri-State Tech - Baltimore   F4    | CDC    | 2020     | October     | USD 6,000.00 | 0.00         | 0.00       | 100.00%         | 0.00            |

User is directed to details page

|                             |        |              |                         |                        |                          |   |
|-----------------------------|--------|--------------|-------------------------|------------------------|--------------------------|---|
| Goals & Performance<br>2020 |        |              |                         |                        |                          | <a href="#">New Opportunity</a> <a href="#">Edit</a> <a href="#">New Note</a> |
| Fiscal Month                | Brands | Goal         | Booking Amount (Rollup) | Credit Amount (Rollup) | Pipeline Amount (Rollup) |   |
| September                   | CDC    | USD 5,000.00 | 30,839.25               | 0.00                   | 129,250.00               |   |

Chatter isn't enabled or the user doesn't have Chatter access.

DETAILS

RELATED

---

|                                    |                   |
|------------------------------------|-------------------|
| Goals & Performance Name           | Currency          |
| GP-02097                           | USD - U.S. Dollar |
| Partner Org                        |                   |
| Tri-State Tech - Philadelphia   F2 |                   |
| Brands                             |                   |
| CDC                                |                   |
| Fiscal Month                       |                   |
| September                          |                   |
| Fiscal Year                        |                   |
| 2020                               |                   |

Click on the Related tab to view the associated records- Credits and Bookings, Opportunities, etc.,

DETAILS
**RELATED**

Open Activities (0)

New Task New Event

Credits and Bookings (6+)

New

| Credits and Booking: Cre... | Amount       | Type    | Created Date      |   |
|-----------------------------|--------------|---------|-------------------|---|
| <a href="#">CB-0402</a>     | USD 2,941.41 | Booking | 9/17/2020 7:43 AM | ▼ |
| <a href="#">CB-0420</a>     | USD 500.00   | Booking | 9/18/2020 1:31 PM | ▼ |
| <a href="#">CB-0421</a>     | USD 150.00   | Booking | 9/18/2020 1:31 PM | ▼ |
| <a href="#">CB-0426</a>     | USD 1,000.00 | Booking | 9/18/2020 1:31 PM | ▼ |
| <a href="#">CB-0427</a>     | USD 500.00   | Booking | 9/18/2020 1:32 PM | ▼ |
| <a href="#">CB-0428</a>     | USD 150.00   | Booking | 9/18/2020 1:32 PM | ▼ |

View All

Opportunity Pipeline (3)

New

| Opportunity Pipeline: O...               | Opportunity Pipeline: Cre... | Opportunity Pipeline: Cre... | Opportunity Closed       |   |
|--|------------------------------|------------------------------|--------------------------|---|
| <a href="#">ETE-Com189-0817- Pipe...</a> | 8/19/2020 1:48 PM            | <a href="#">Carl Smajda</a>  | <input type="checkbox"/> | ▼ |
| <a href="#">ETE-Com190-0817- Pipe...</a> | 8/19/2020 2:05 PM            | <a href="#">Carl Smajda</a>  | <input type="checkbox"/> | ▼ |
| <a href="#">ETE-Com190-0817- Pipe...</a> | 8/19/2020 3:07 PM            | <a href="#">Carl Smajda</a>  | <input type="checkbox"/> | ▼ |

View All

Activity History (0)

Send an Email

To view the credits and bookings, click on the Credits and Bookings name

Credits and Bookings (6+)

New

| Credits and Booking: Cre... | Amount       | Type    | Created Date      |   |
|-----------------------------|--------------|---------|-------------------|---|
| <a href="#">CB-0402</a>     | USD 2,941.41 | Booking | 9/17/2020 7:43 AM | ▼ |
| <a href="#">CB-0420</a>     | USD 500.00   | Booking | 9/18/2020 1:31 PM | ▼ |
| <a href="#">CB-0421</a>     | USD 150.00   | Booking | 9/18/2020 1:31 PM | ▼ |
| <a href="#">CB-0426</a>     | USD 1,000.00 | Booking | 9/18/2020 1:31 PM | ▼ |
| <a href="#">CB-0427</a>     | USD 500.00   | Booking | 9/18/2020 1:32 PM | ▼ |
| <a href="#">CB-0428</a>     | USD 150.00   | Booking | 9/18/2020 1:32 PM | ▼ |

View All

User is directed to the details page from where the information such as Amount, Quote, Goals and Performance records to which it is tied to can be viewed.

DETAILS

ACTIVITY

Credits and Booking Name

CB-0421

Amount

USD 150.00

Type

Booking


Quote

[Q-00810](#)

Contract

Charge Type

Created By

 Beth Pina, 9/17/2020 11:26 PM

Currency

USD - U.S. Dollar

Amount (USD)

150.00

Goals & Performance

[GP-02097](#)


Created Date

9/18/2020 1:31 PM

External Id

00000145

Last Modified By

 Beth Pina, 9/18/2020 1:32 PM

## 11. TASKS

Tasks refer to the calendar activities such as Meetings, calls, etc., that the user creates and can set reminders and track the details.

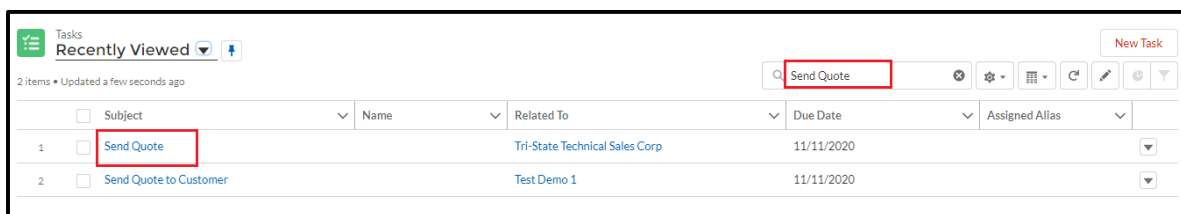
The tasks and the details are reflected on the home page.

1. Navigate to Tasks tab

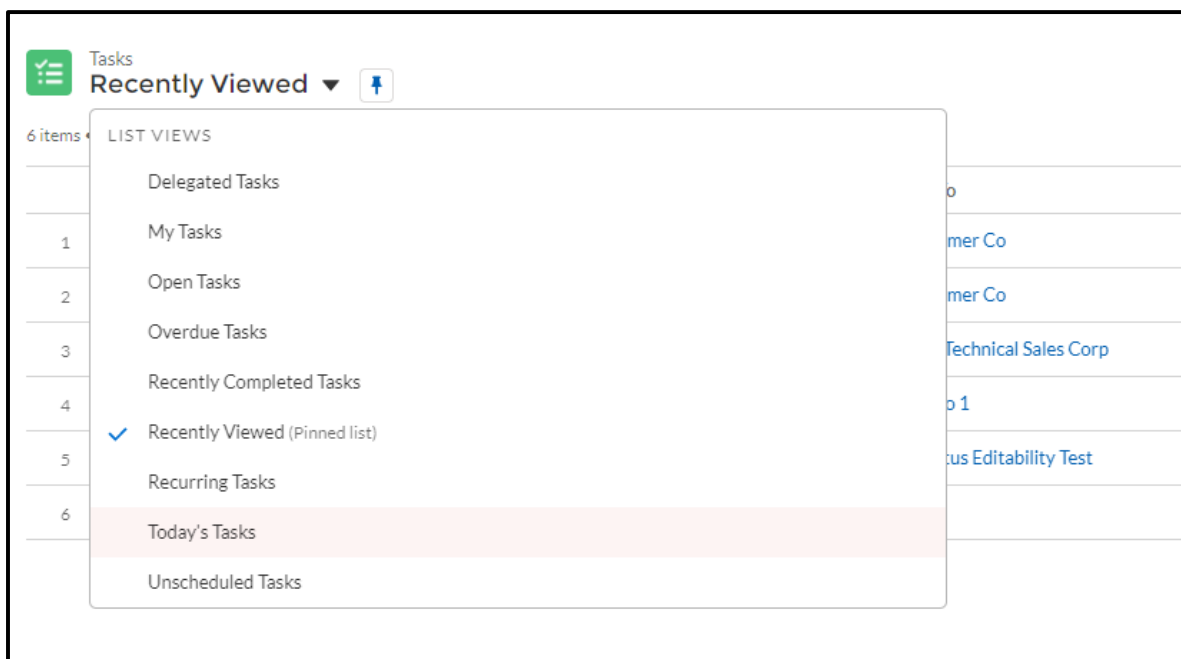


### 11.1 Search for Task

1. To search for an already existing Task, user can enter the Task subject in the search box. Search results matching the criteria will list.



2. Alternatively, user can change the filter and search for the desired Task.



### 11.2 Creation of a Task

1. Click on **New Task** button

| <div> <div>Tasks</div> <div>Recently Viewed ▾</div> <div>6 items • Updated 2 minutes ago</div> </div> <div> <div>Search this list...</div> <div> <div>⚙</div> <div>📄</div> <div>🔄</div> <div>✎</div> <div>🗑</div> <div>⌵</div> </div> <div>New Task</div> </div> |  |            |                                |            |                  |
|--|--|------------|--------------------------------|------------|------------------|
| <input type="checkbox"/>   | Subject ▾  | Name ▾     | Related To ▾                   | Due Date ▾ | Assigned Alias ▾ |
| 1  | <input type="checkbox"/> Test Task Visibility v2 |            | Big Customer Co                |            | csmaj            |
| 2  | <input type="checkbox"/> Call                    |            | Big Customer Co                | 10/16/2020 | csmaj            |
| 3  | <input type="checkbox"/> Send Quote              |            | Tri-State Technical Sales Corp | 11/11/2020 | csmaj            |
| 4  | <input type="checkbox"/> Send Quote to Customer  |            | Test Demo 1                    | 11/11/2020 | csmaj            |
| 5  | <input type="checkbox"/> Call                    |            | Oppy Status Editability Test   | 11/5/2020  | csmaj            |
| 6  | <input type="checkbox"/> Call this lead          | Tom Edison |                                | 11/11/2020 | csmaj            |

Enter all the details required for creation of Task and click on **Save** button

New Task

Task Information

\* Subject

Call

\* Assigned To

Carl Smajda

×

Name

Amy Wingler

×

\* Activity Currency

USD - U.S. Dollar

Comments

Due Date

11/20/2020

Related To

Tri-State Tech - Baltimore | F4

×

Save & New

Cancel

Save

Note that Subject, Assigned To, Activity Currency, Priority and Status fields are mandatory, and an error message will be displayed if these values are not entered.

### 11.3 Edit a Task

1. Click on **Edit** button

**Task Call**

✓ Mark Complete **Edit** Delete Edit Comments ▼

Name: [Amy Wingler](#) Related To: [Tri-State Tech - Baltimore | F4](#)

**DETAILS** ACTIVITY

Attachments (0)

▼ Task Information

Subject: Call

Assigned To: [Carl Smajda](#) Due Date: 11/20/2020

Name: [Amy Wingler](#) Related To: [Tri-State Tech - Baltimore | F4](#)

2. Make the necessary changes and click on **Save** button

**Edit Call**

**Task Information**

\* Subject: Call

\* Assigned To: [Carl Smajda](#) Due Date: 11/20/2020

Name: [Amy Wingler](#) Related To: [Tri-State Tech - Baltimore | F4](#)

\* Activity Currency: USD - U.S. Dollar

Comments: Test Comments

Save & New Cancel **Save**

To mark the Activity as complete, click on **Mark Complete** button.

**Task Call**

✓ Mark Complete Edit Delete Edit Comments ▼

Name: [Amy Wingler](#) Related To: [Tri-State Tech - Baltimore | F4](#)

Alternatively, user can also edit the Status field and set it to **Complete**

The Mark Complete button is now changed to **Completed**

This screenshot shows a task card for 'Task Call'. At the top right, there is a toolbar with four buttons: 'Completed' (highlighted with a red box), 'Edit', 'Delete', and 'Edit Comments'. Below the toolbar, the task details are listed: 'Name' is 'Amy Wingler' and 'Related To' is 'Tri-State Tech - Baltimore | F4'.

## 11.4 Delete a Task

1. Click on **Delete** button

This screenshot shows the full task details page for 'Task Call'. The 'Delete' button in the top right toolbar is highlighted with a red box. The page has two tabs: 'DETAILS' (active) and 'ACTIVITY'. Under the 'DETAILS' tab, there is a 'Task Information' section with the following fields: 'Subject' (Call), 'Assigned To' (Carl Smajda), 'Due Date' (11/20/2020), 'Name' (Amy Wingler), and 'Related To' (Tri-State Tech - Baltimore | F4). On the right side, there is an 'Attachments (0)' section.

2. Confirm the deletion of the task by clicking on Delete button

This screenshot shows a confirmation dialog titled 'Delete Task'. The dialog contains the text 'Are you sure you want to delete this task?'. At the bottom right, there are two buttons: 'Cancel' and 'Delete'.