

SFDC 1,2,3 Process Training

January 2015

1. Log the Opportunity
2. Add the Product on the Opportunity
3. Establish a Schedule on the Product

The 3 most important Objects in SFDC are:

1. Accounts
 - a. Organization or companies
2. Contacts
 - a. People who work at the organization or company
3. Opportunities
 - a. Potential sales/pending deals

The most important fields for each of these objects are located in the top section of the screen when looking at the “Accounts,” “Contacts,” or “Opportunities” page (as shown below). It is important that all the information in those fields remains up-to-date. For example, if a client leaves, it is extremely important that the Account Record Type field is updated to “Former.”

The screenshot displays the Salesforce interface for a contact named Bruno Trimouille. The top navigation bar includes Home, Chatter, Accounts, Contacts (selected), Opportunities, Leads, Campaigns, Reports, Dashboards, Documents, TimeTrackers, Files, Marketo, Products, and Tools/Solutions. The user profile for Bruno Trimouille is shown, along with social media icons for LinkedIn, Twitter, Facebook, and YouTube. A 'Show Feed' button is visible. Below the navigation, there are links for 'Back to List: TimeTrackers' and various history links: Opportunities [0], Open Activities [0], Activity History [0], Campaign History [1], HTML Email Status [0], Contact History [2], and Partner Influence [0].

The 'Contact Detail' section is highlighted with a red box and contains the following information:

Contact Information	
Name	Bruno Trimouille
Account Name	Vendavo
Preferred Phone	
Title	Senior Director Marketing
Employment Status	Current
Contact Owner	Steve Weber [Change]
Contact Status	No Contact
Contact Status Reasons	
Flag	<input type="checkbox"/>
Lead Source	Cold Call/Prospecting

Below the 'Contact Information' section is the 'Contact Methods & Status' section, which includes fields for Phone, Mobile, LinkedIn URL, Phone 2, Preferred Phone?, and Email options.

1. Log an Opportunity

First, go to the “Contact page,” hover over opportunities, and click “New Opportunity.”

The screenshot shows the Salesforce user interface for user Jordyn Lea. The navigation bar includes Home, Chatter, Accounts, Contacts, Opportunities, Leads, Campaigns, Reports, and Dashboards. Below the navigation bar, there is a profile card for Jordyn Lea with social media icons for LinkedIn, Twitter, Facebook, and YouTube. A 'Show Feed' button is visible. Below the feed, there is a 'Back to List: Users' link. The main content area shows a list of opportunities for the account 'Jordyn's Test Account-SEO'. The 'New Opportunity' button is highlighted with a red box. The table below shows the following data:

Action	Opportunity Name	Stage
Edit Del	Jordyn's Test Account-SEO	Engaged

Once you click “New Opportunity” the screen below will appear. All fields with a red mark are required.

The screenshot shows the 'New Opportunity' form in Salesforce. The form is titled 'Opportunity Edit' and has a 'Save & Add Product' button and a 'Cancel' button. The form is divided into two sections: 'Opportunity Information' and 'Description Information'. The 'Opportunity Information' section contains the following fields:

Field	Value
Account Name	Jordyn's Test Account
Opportunity Name	
Type	--None--
Lead Source	Cold Call/Prospecting
Opportunity Owner	Jordyn Leaver
Amount	
Stage	--None--
Forecast Category	Pipeline
Probability (%)	0
Close Date	[1/20/2015]
Length of Agreement	--None--

The 'Description Information' section contains the following fields:

Field	Value
Next Step Date	[1/20/2015]
Next Step	
Description	

Opportunity Name: When naming the opportunity use the Account Name and the product they are interested in: Example: Company XYZ-SEO PPC.

Type: An opportunity will only be logged (for SAE's) when a current client is increasing (buying more) or adding on a product. The different types include:

Primarily used by BDMs:

1. New Recurring
 - o New client with recurring MRR 6 months or more
2. New Project
 - o New client with project length less than 6 months

Primarily used by SAEs:

3. Add-On Recurring
 - o Current client, adding on additional MRR
4. Add-On Project
 - o Current client adding on revenue for less than 6 months

Example: If a current client pays 5,000 a month for SEO and starting next month they will be paying 7,000 a month for SEO for the next year, log that as a new opportunity as an “Add-on Recurring” of 2,000.

Amount: Any value can be placed in the amount field (this will make more sense in step 2&3).

2. Log a Product on an Opportunity

Once all the information is entered, click “Save and Add Product” at the top of the page and the following screen will appear:

Product Selection for
Opportunity Jordyn's Test Account-SEO

Enter your keyword and filter criteria, then click Search to begin your search. Click More filters to use more than one filter. Search results include all records

Select Cancel

Find Products

By Keyword By Field Filter [More filters >>](#)

Search

<input type="checkbox"/>	Product Name	Product Family	Product Description	Active (Pr
<input type="checkbox"/>	Mgmt Fee	Advertising		✓
<input type="checkbox"/>	Consulting Advertising	Advertising		✓
<input type="checkbox"/>	PPC % Fee	Advertising		✓
<input type="checkbox"/>	Display	Advertising		✓
<input type="checkbox"/>	Consulting Analytics	Analytics		✓
<input type="checkbox"/>	Content Production	Content Marketing		✓
<input type="checkbox"/>	Consulting Content Marketing	Content Marketing		✓
<input type="checkbox"/>	Design	Creative Design		✓

This is where you will select the product the customer is interested in by either searching “By Keyword” at the top or by scrolling down the screen or choosing the right product.

Product Family: This represents a broad category used to group all the products Fathom offers.

Product Name: This is the specific product you will be selling.

Check the box next to the desired product and then click “select” at the top of the screen. (Note: You may select more than one product per opportunity-if a client is increasing spend in Email & SEO-that can be done on the same opportunity).

Once you click “Select” you will see the screen shown below:

Product	Billing Type	Billing Category	Sales Price	Date [1/20/2015]	Line Description
Marketing Automation	New	MRR	0.00		
SEO	New	MRR	0.00		

Adjust the “Billing Type” and “Billing Category” for each product above.

Note: If one product is MRR and the other is a project, that is OK to log on the same opportunity. Just be certain to make the distinction on the screen above.

Next, enter the **Sales Price** and the **Scheduled Date**.

Note: Date will be the same as the close date on the overall opportunity unless you know for certain you will not recognize that revenue for a few more months. Example: I sign an SEO Add-on in January but they do not want to start until April, the date on the above screenshot would be April 1st.

Click “Save” and you will then be re-directed to the original opportunity screen.

3. Establish a Schedule on a Product

Once you have selected your products they will now appear on the opportunities page. To view the opportunity products hover over the “Products (Standard Price Book)” object shown in the screen shot below. You can see Marketing Automation and SEO have been added as products.

Home Chatter Accounts Contacts **Opportunities** Leads Campaigns Reports Dashboards

Opportunity
Jordyn's Test Account-SEO

Show Feed

« Back to List: TimeTrackers

Contact Roles [1] **Products (Standard Price Book) [2]** Opportunity Team [1] Open Activities [0] Activity History [0] C

Products (Standard Price Book) Add Product Edit All Sort

Action	Product
Edit Del	Marketing Automation
Edit Del	SEO

Opportunity Name Jordyn's Test Account-SEO

Next, we want to **establish a revenue schedule** for each products. First, we are going to click on “Marketing Automation” and you will be directed to the following page:

Opportunity Product
Marketing Automation for Jordyn's Test Account-SEO

« Back to List: TimeTrackers

Schedu

Opportunity Product Detail Edit Delete

Opportunity [Jordyn's Test Account-SEO](#)

Product [Marketing Automation](#)

Family [Email](#)

Billing Type Add-On

Billing Category MRR

Line Description

▼ System Information

Created By [Jordyn Leaver](#), 1/20/2015 1:39 PM

Edit Delete

Schedule **Establish**

No records to display

^ Back To Top Always show me fewer.

To establish a schedule click the “Establish” button in the screenshot above.
The following screen will appear:

The screenshot shows a form titled "Establish Revenue Schedule for Marketing Automation". The form contains the following fields and values:

Opportunity	Jordyn's Test Account-SEO
Start Date	1/20/2015 [1/20/2015]
Revenue	1,000.00
Schedule Type	--None--
Installment Period	--None--
Number of Installments	

At the bottom right of the form are two buttons: "Save" and "Cancel".

The schedule type represents how the 1,000 will be distributed. It can either be divided into multiple installments or repeated for multiple installments.

In this example, we will say the client will pay 1,000 with the installment repeated monthly for 12 months. Once the information is filled in it will appear like this:

The screenshot shows the same form as above, but with the following updated values:

Opportunity	Jordyn's Test Account-SEO
Start Date	1/20/2015 [1/20/2015]
Revenue	1,000.00
Schedule Type	Repeat Amount for each installment
Installment Period	Monthly
Number of Installments	12

At the bottom right of the form are two buttons: "Save" and "Cancel".

Once I click “Save” I will be directed to a screen that will show the revenue for the next 12 months:

Edit Schedule for Marketing Automation

Modify the schedule for this product. Click Recalculate to preview how your changes affect the total amount of the stored on the product.

			Save	Save &
Date		Revenue	Comments	
1/20/2015	[1/20/2015]	1,000.00		
2/20/2015	[1/20/2015]	1,000.00		
3/20/2015	[1/20/2015]	1,000.00		
4/20/2015	[1/20/2015]	1,000.00		
5/20/2015	[1/20/2015]	1,000.00		
6/20/2015	[1/20/2015]	1,000.00		
7/20/2015	[1/20/2015]	1,000.00		
8/20/2015	[1/20/2015]	1,000.00		
9/20/2015	[1/20/2015]	1,000.00		
10/20/2015	[1/20/2015]	1,000.00		
11/20/2015	[1/20/2015]	1,000.00		
12/20/2015	[1/20/2015]	1,000.00		
	[1/20/2015]			

Once I click save and return to the Opportunity, I am able to see that the Opportunity Amount was updated to reflect the TOTAL amount of the Opportunity (the revenue schedule for Marketing Automation totaled as well as the original value for SEO).

Opportunity Customize Page | Edit

Jordyn's Test Account-SEO

Show Feed

« Back to List: TimeTrackers

[Contact Roles \[1\]](#) | [Products \(Standard Price Book\) \[2\]](#) | [Opportunity Team \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Campaign Influence \[0\]](#) | [Partner Influence \[0\]](#) | [DocuSign Status \[0\]](#) | [Notes](#) | [Competitors \[0\]](#)

Opportunity Detail Edit Delete Clone Sharing Email with Tout Send with DocuSign E-Sign

▼ Opportunity Information

Account Name	Jordyn's Test Account	Opportunity Owner	Jordyn Leaver [Change]
Opportunity Name	Jordyn's Test Account-SEO	Amount	\$14,000.00
Type	Add On (Recurring)	Stage	Engaged
Lead Source	Cold Call/Prospecting	Forecast Category	Pipeline
		Probability (%)	30%
		Close Date	1/20/2015
		Length of Agreement	12 Months

Next, I will follow the same process to establish a schedule for my second product, SEO.

Keep in mind the revenue schedule can be easily edited. For example, the revenue schedule for PPC will be a “best guess” and as we figure out the correct amount for each month, the schedule can be edited.