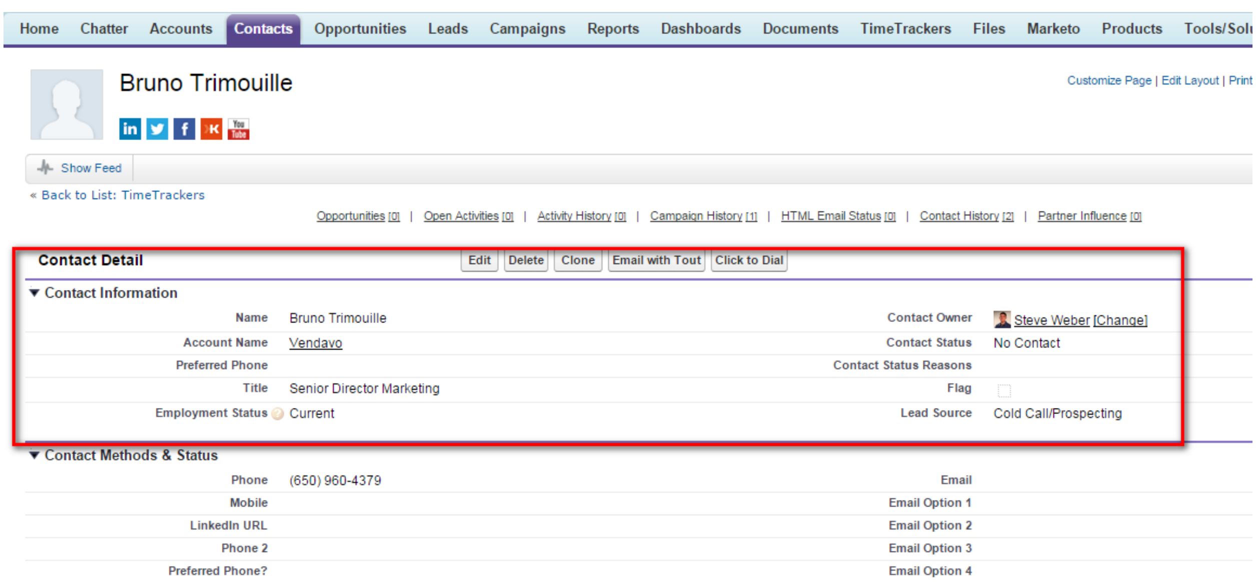
SFDC 1,2,3 Process Training
January 2015

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:

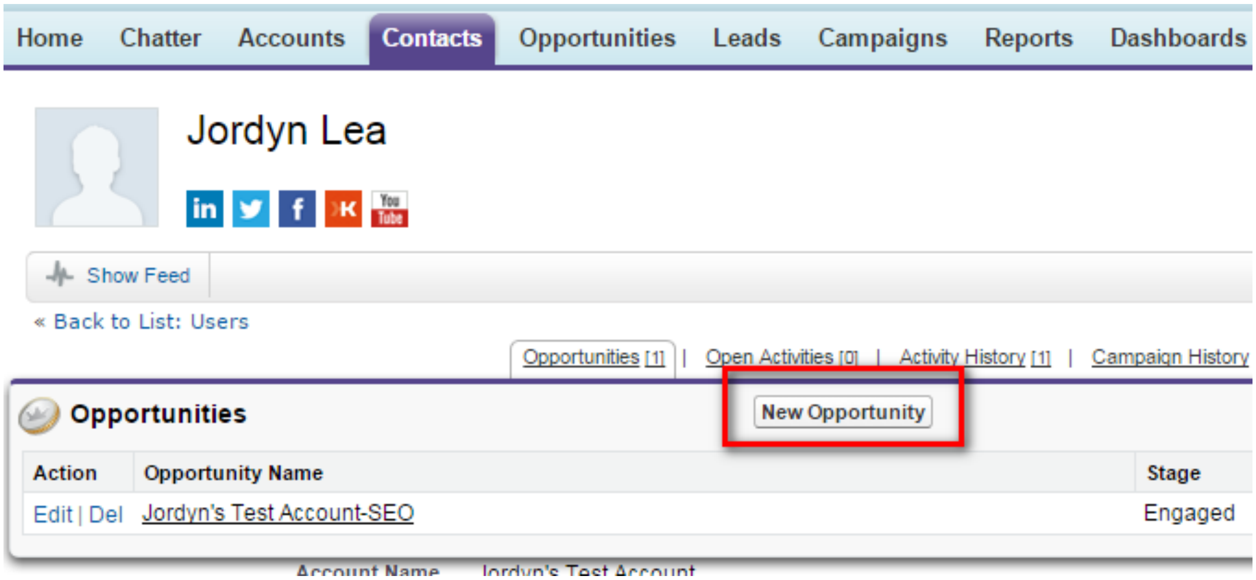
1. Accounts
    a. Organization or companies
2. Contacts
    a. People who work at the organization or company
3. Opportunities
    a. Potential sales/pending deals

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."

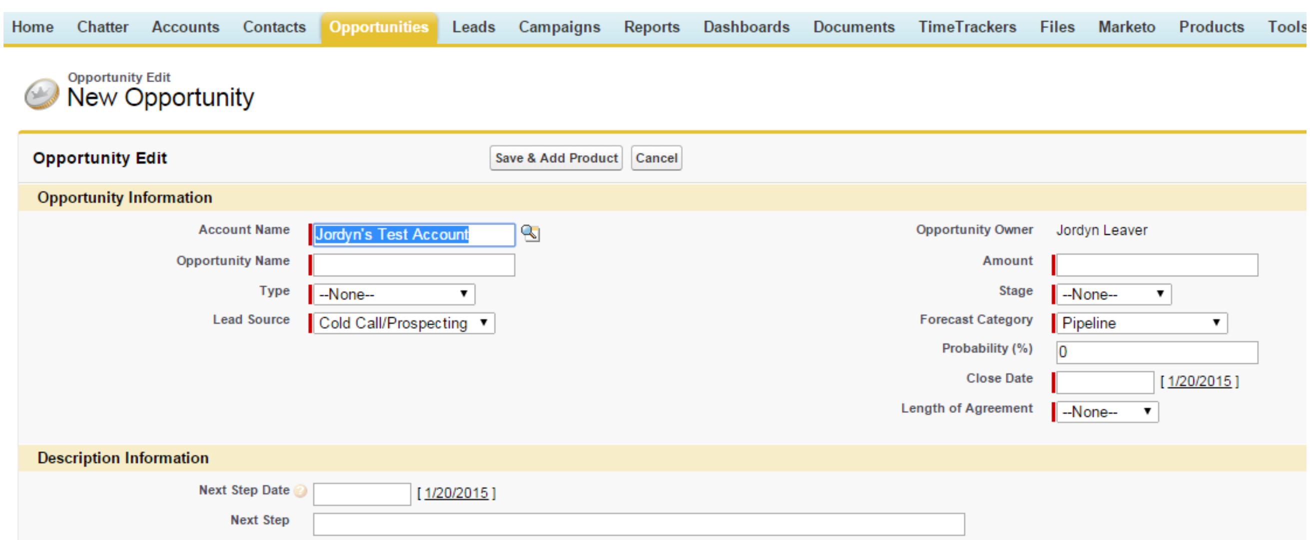


1. Log an Opportunity

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



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



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

Primarily used by SAEs:

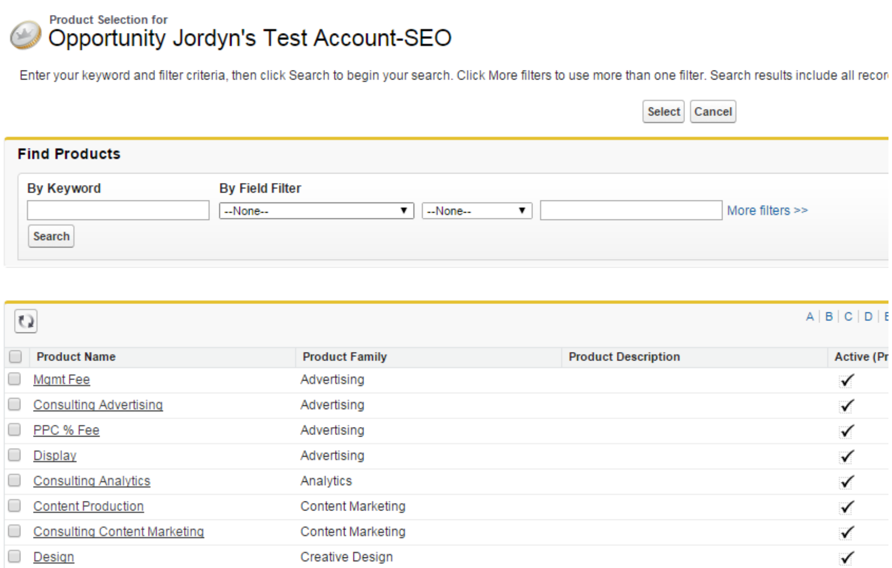
3. Add-On Recurring
   - Current client, adding on additional MRR
4. Add-On Project
   - Current client adding on revenue for less than 6 months

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:



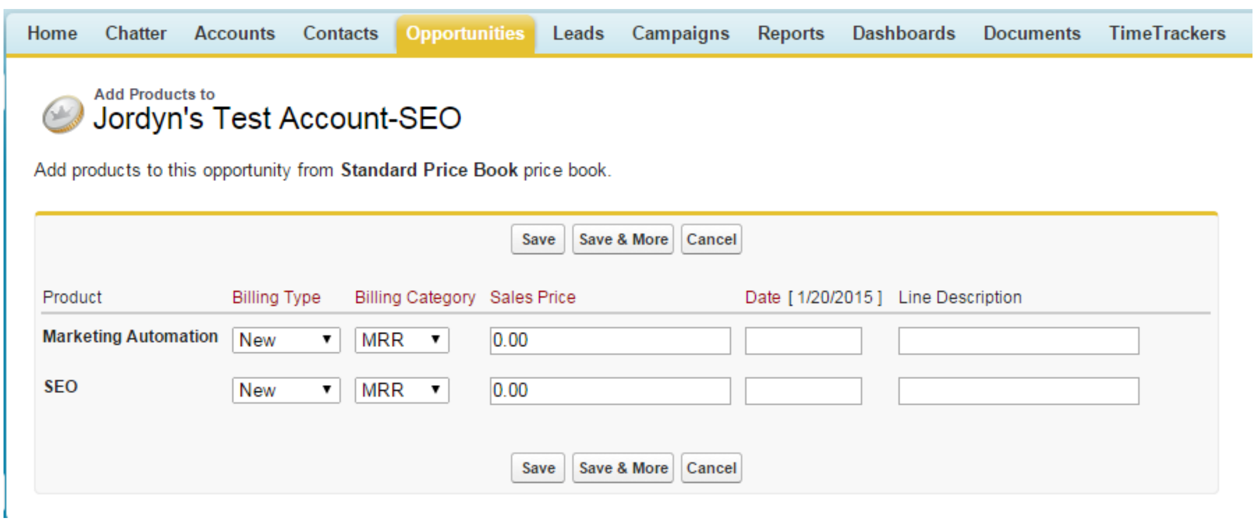
This is where you will select the product the customer is interested in by either searching “By Keyword” at the top or by scrolling down the screen or choosing the right product.

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:



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.

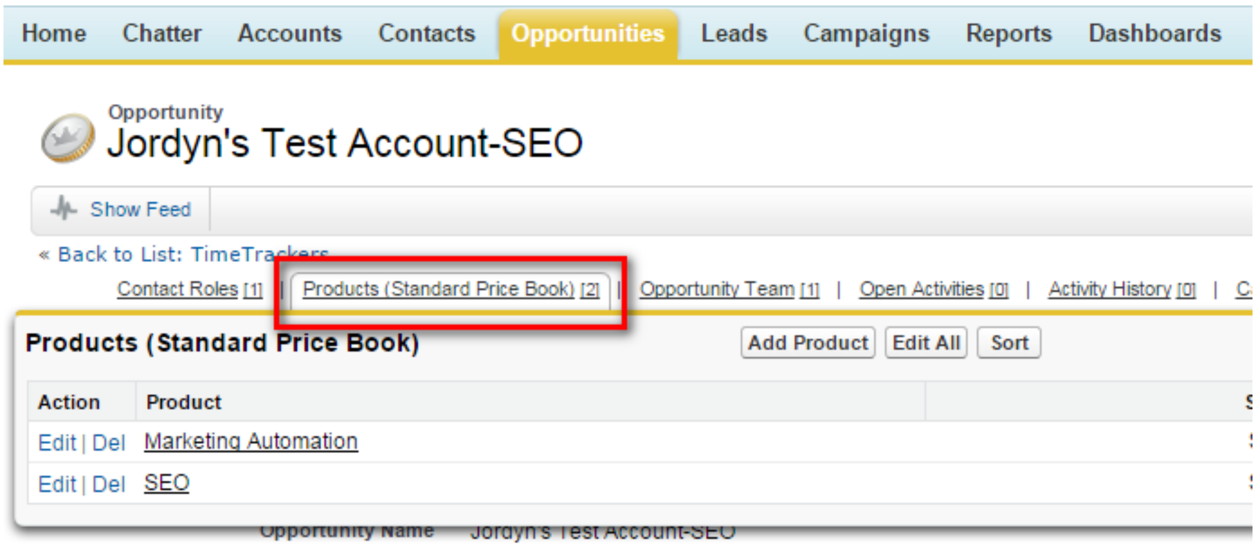
Next, enter the **Sales Price** and the **Scheduled Date**.

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.

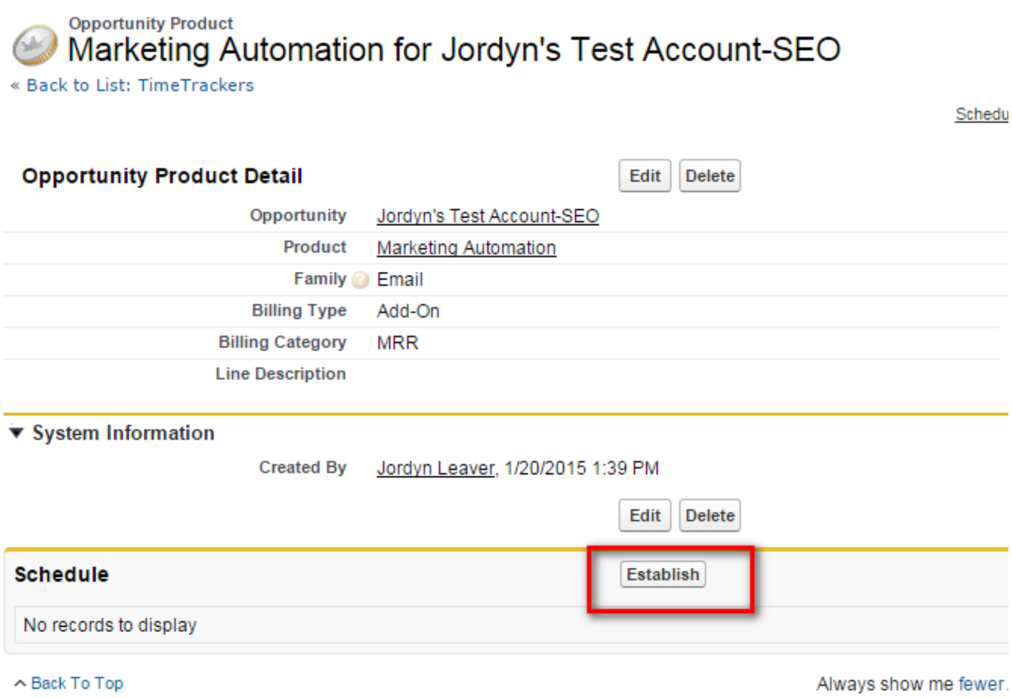
Click “Save” and you will then be re-directed to the original opportunity screen.

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.

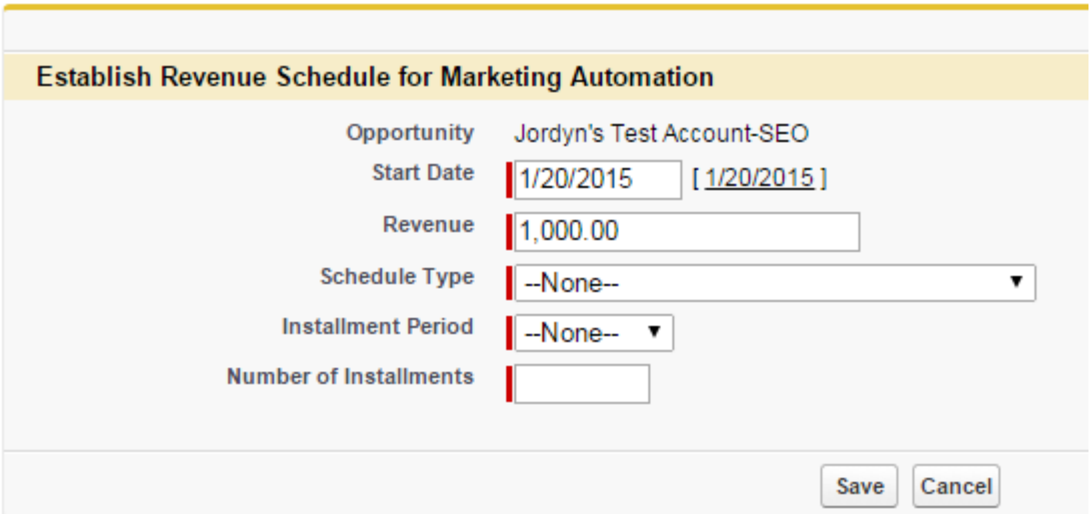


Next, we want to **establish a revenue schedule** for each products. First, we are going to click on “Marketing Automation” and you will be directed to the following page:



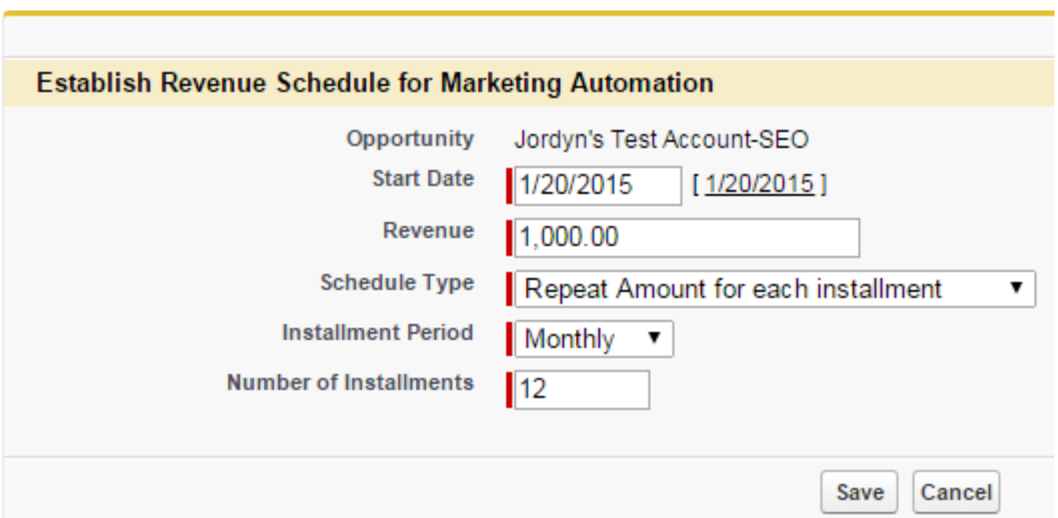
To establish a schedule click the “Establish” button in the screenshot above.

The following screen will appear:

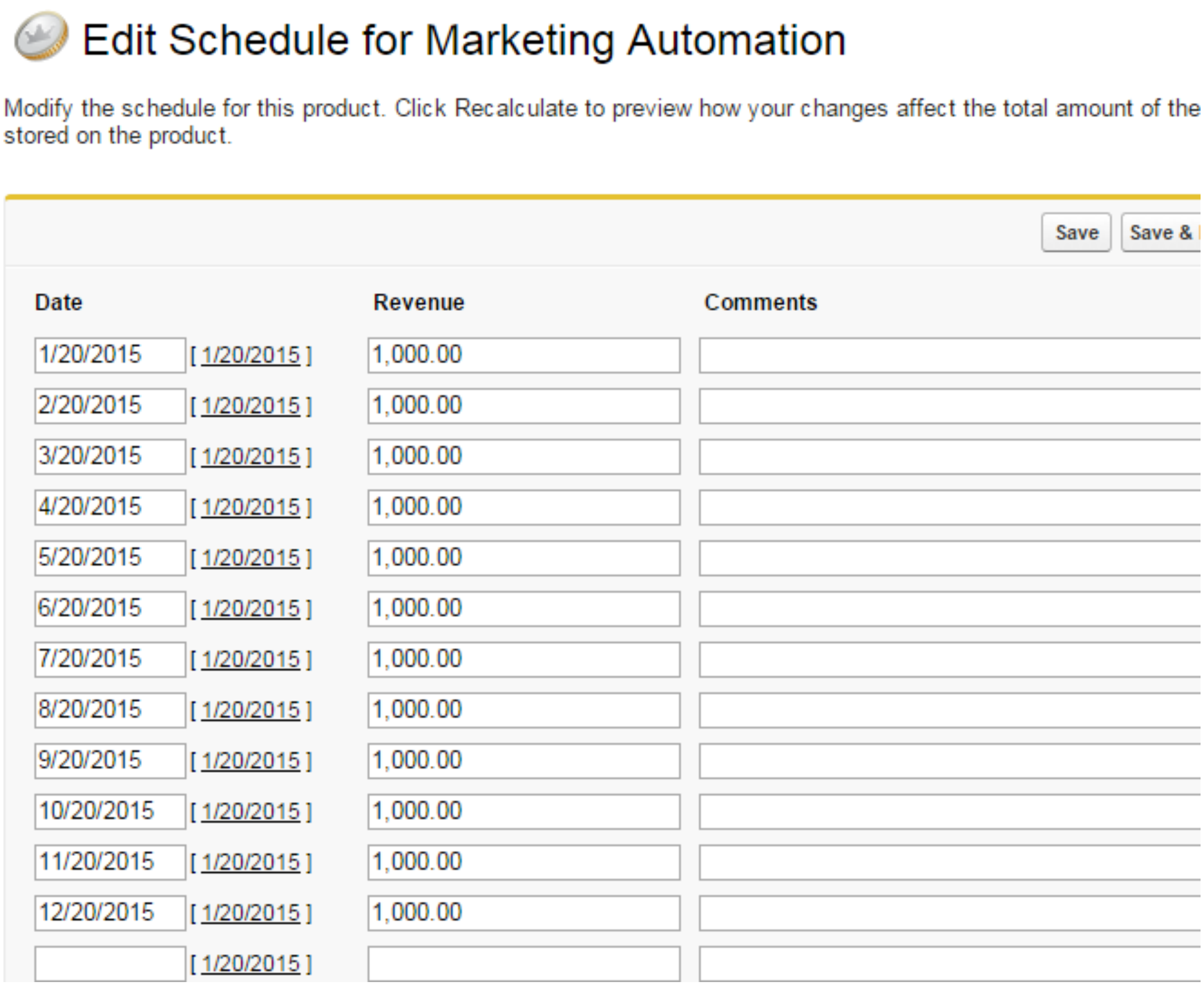


The schedule type represents how the 1,000 will be distributed. It can either be divided into multiple installments or repeated for multiple installments.

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:



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



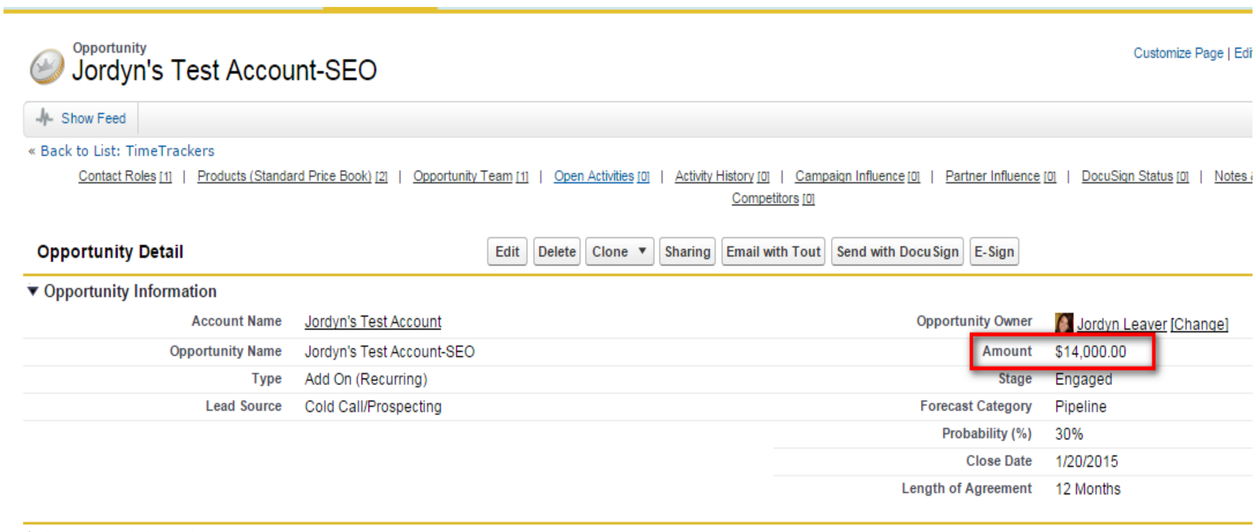
Edit Schedule for Marketing Automation

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).



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.