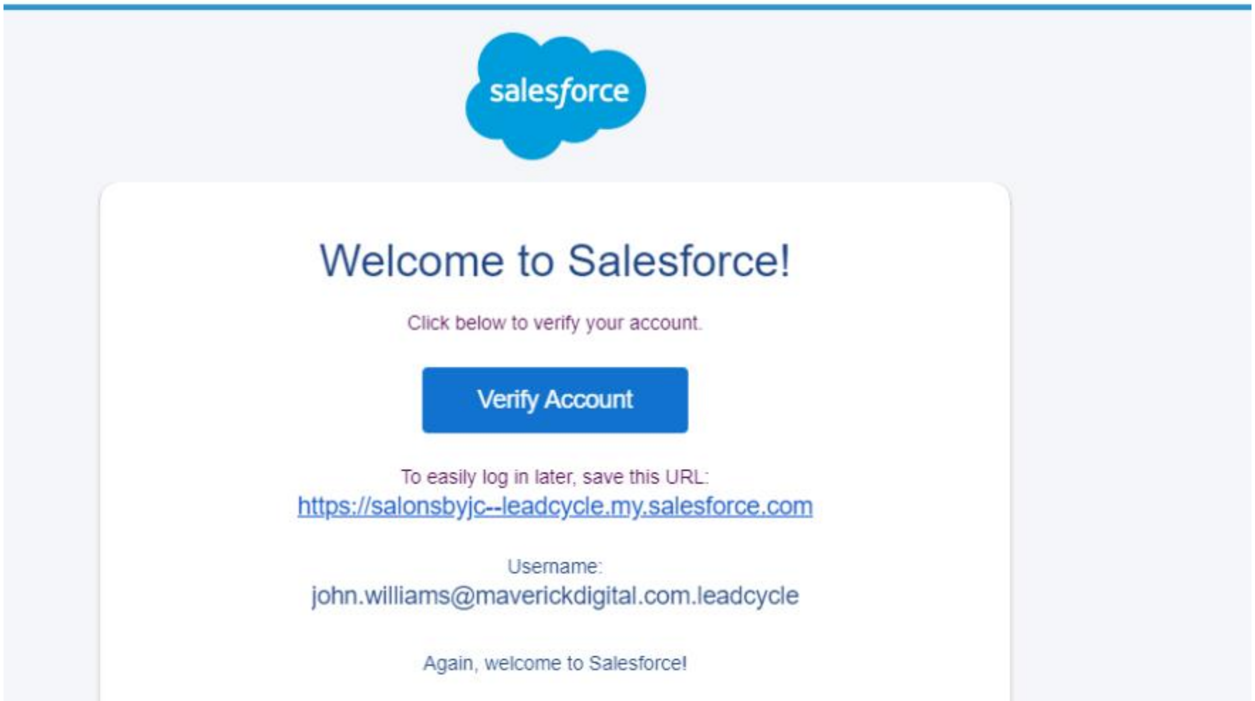
# Training Guide

khushboo mehta

## System Access

Once the user is created in the system, you should receive the below email from Salesforce.




Click on the link and enter the username and create your password.

*Please make sure you save your password in a safe place for future use.*

**Below are the login details for future references:**

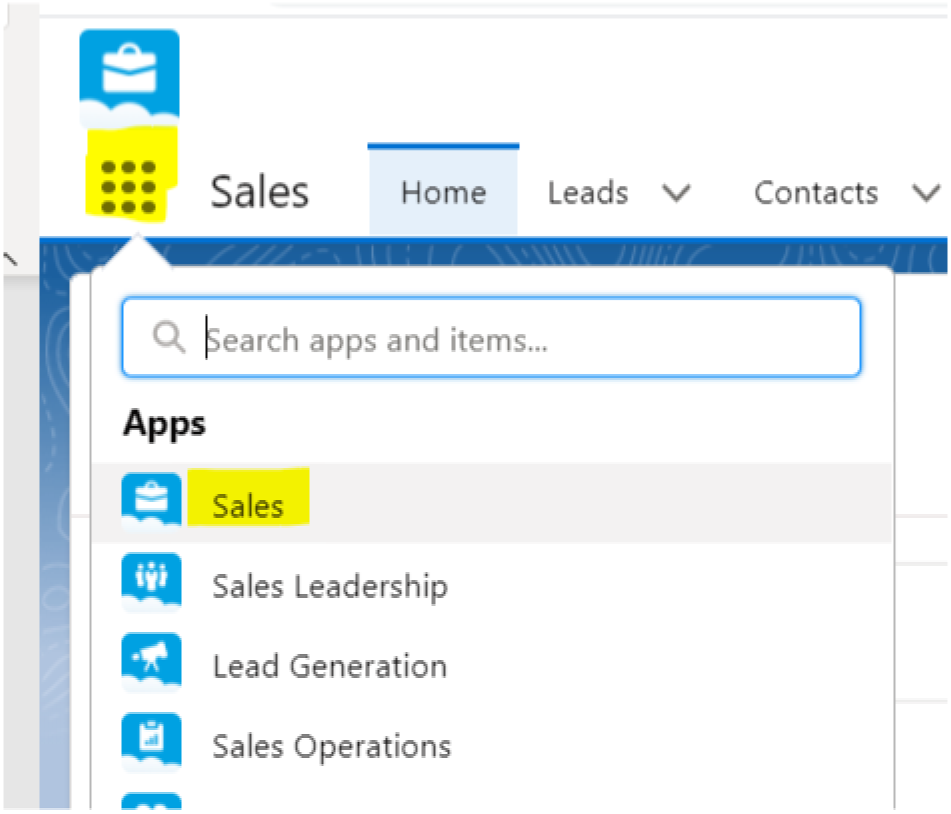
**Login url:** [www.login.salesforce.com](www.login.salesforce.com)

**Username**: This is your email address

**Password:** Password of your choice

**<u>Home Page:</u>**

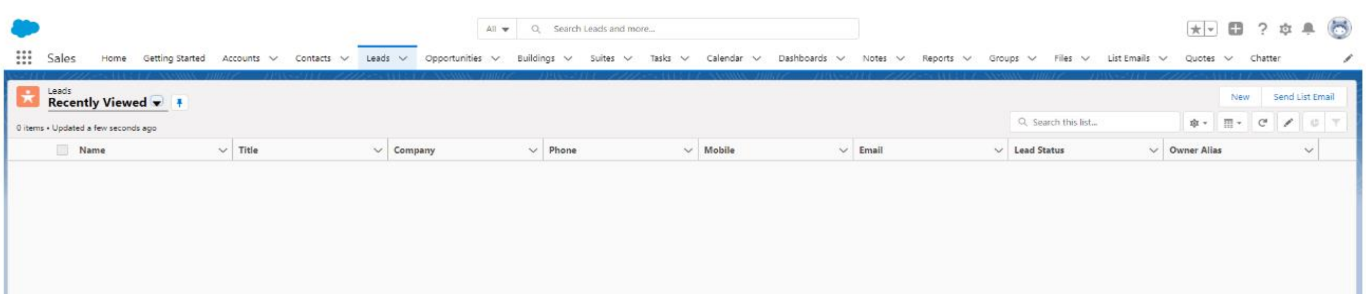
Once you login to Salesforce you will see the **Home Page screen.** Make sure you are in the Sales app. Click on the 9 dots on the upper left side and select **Sales** from the dropdown menu (see image on next page).



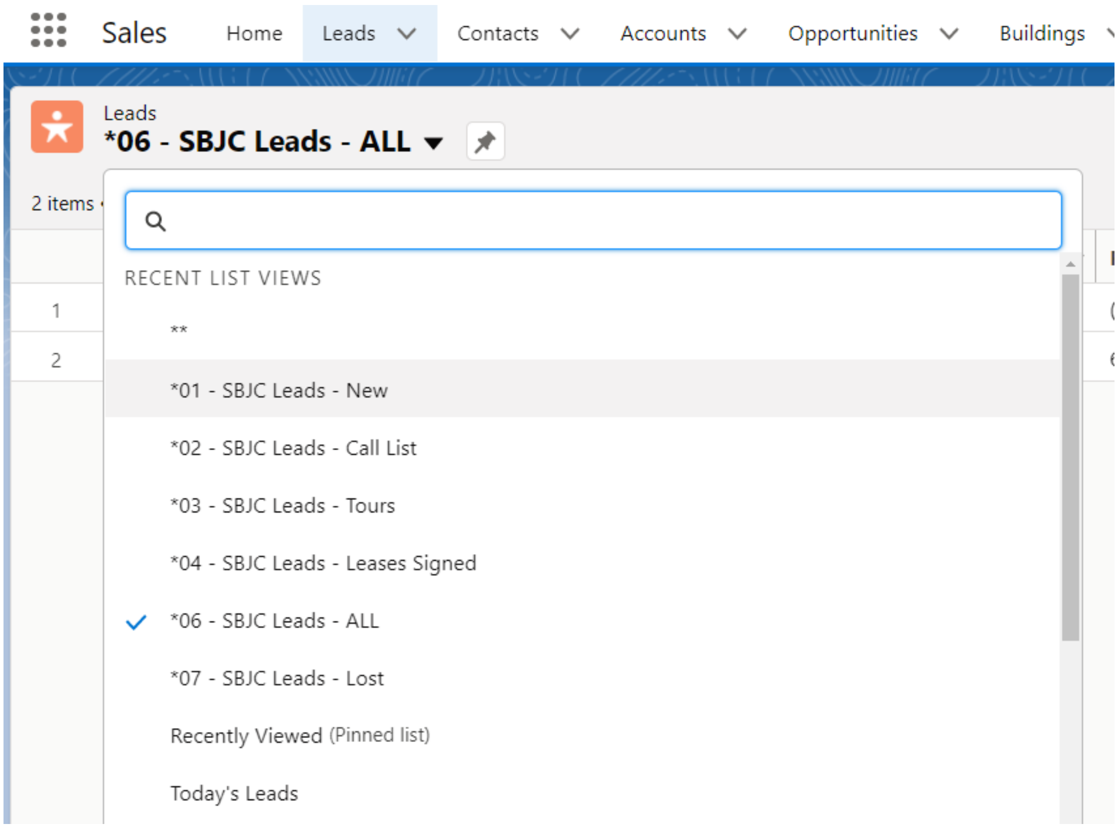

You will see different tabs at the top of your screen which will provide access to different information in the application.

**<u>Lead:</u>**

To view lead information, click on the **Lead** tab. By default, it will take you to **Recently Viewed** leads. You will not see any leads yet as you haven't viewed any recently.

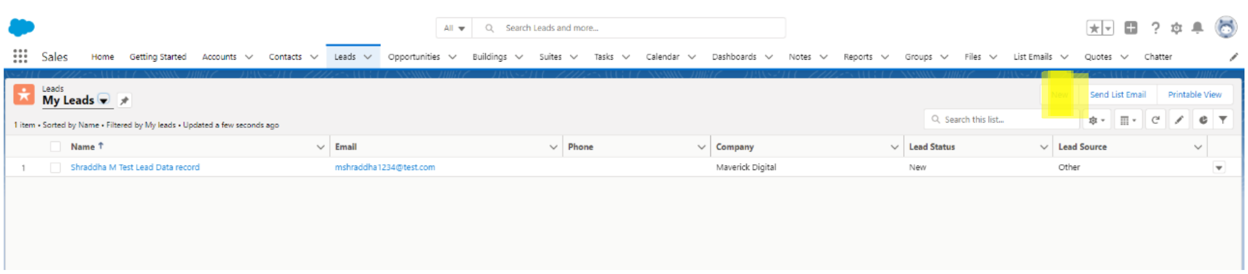



If you click on the dropdown arrow next to **Recently Viewed** different lists will appear.



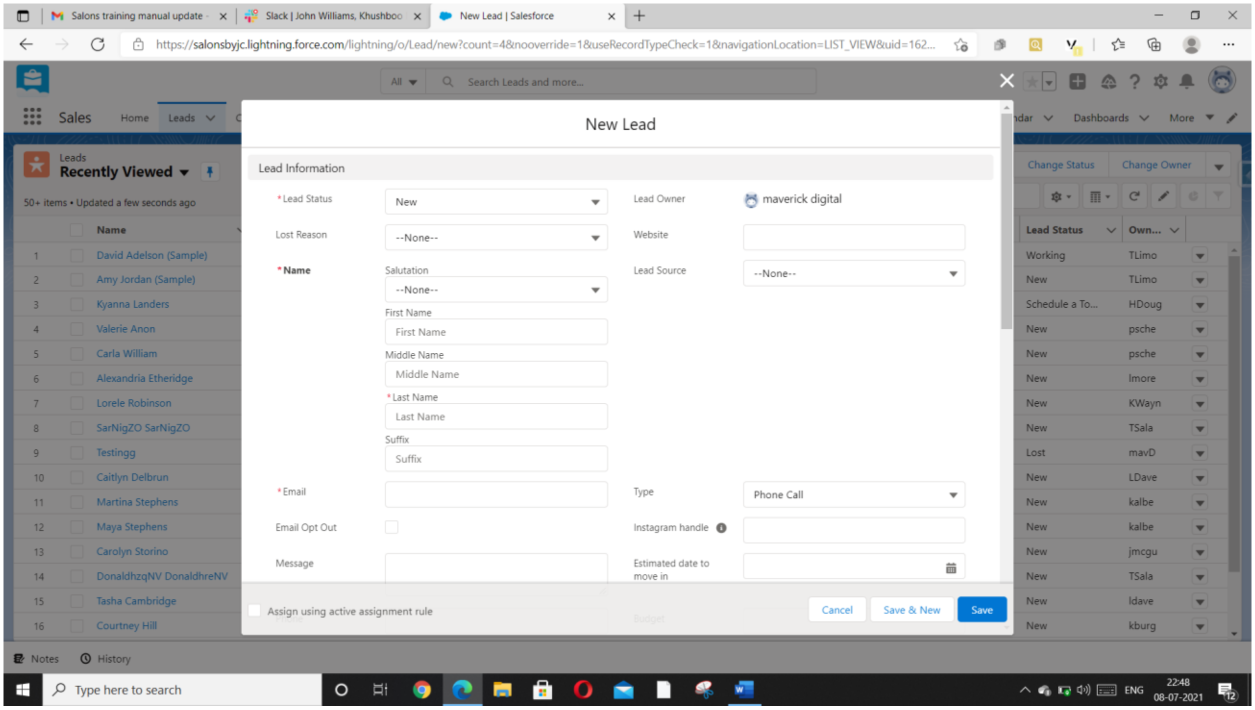

You can at any time pin your **Favorite View** by clicking on **Pin Icon** at the top next to the dropdown arrow.

To view the details of the lead, click on the name of the record.



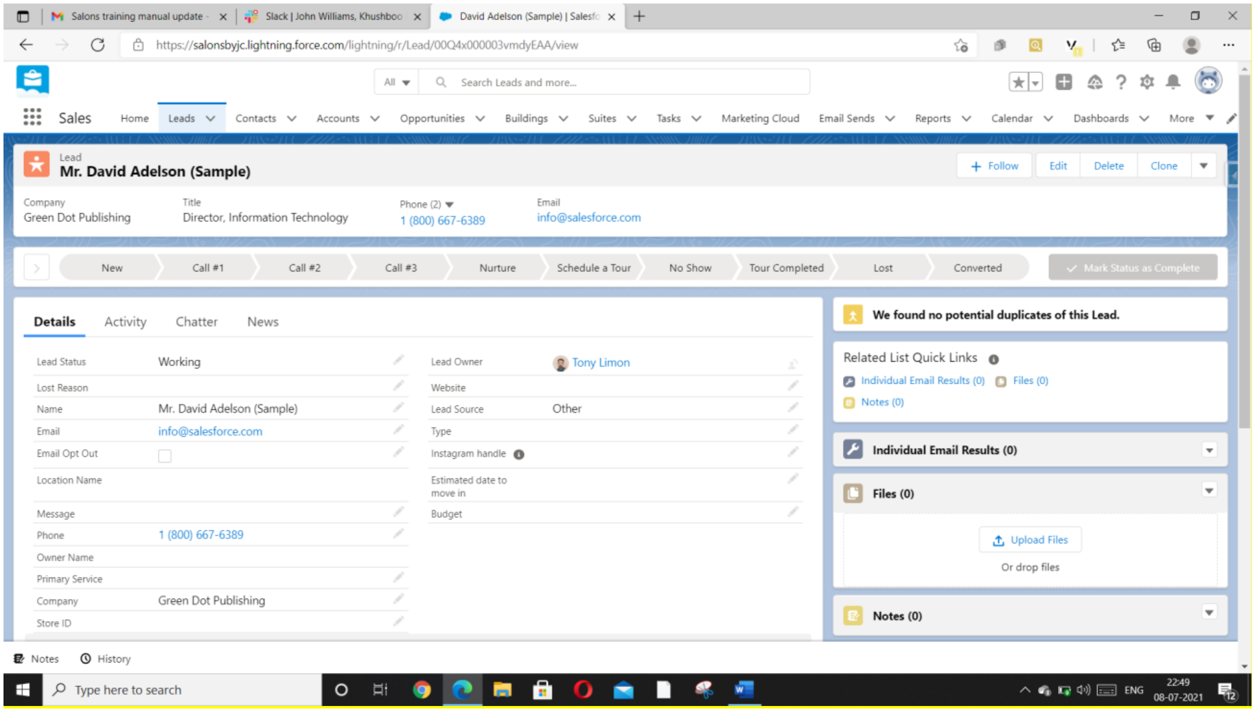

You can create a **New Lead** by clicking on the **New Button** located at the top right of the screen.

All fields with a red asterisk* are mandatory fields.   Once you complete filling out the information click **Save.**

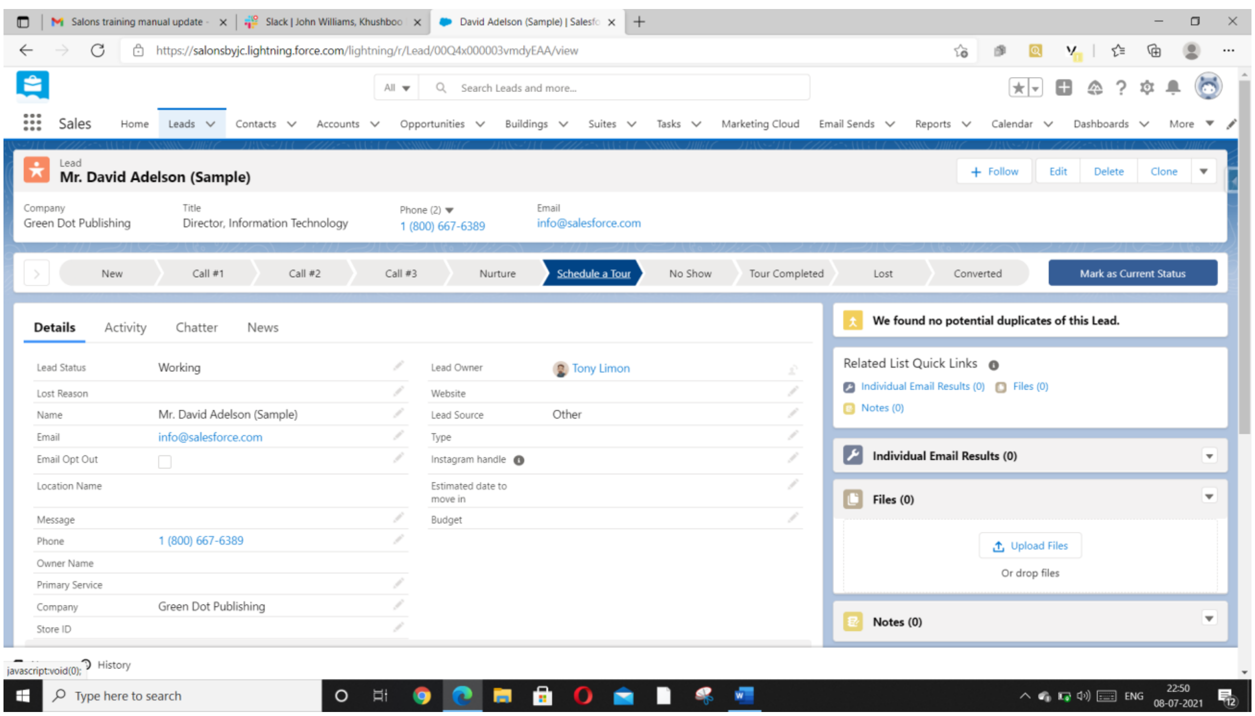



Inside the lead you will see the **Lead Status** marked as **New** on the top navigation bar. Once you start following the lead you can move the lead to **Nurture** by clicking on nurture and select **Mark as Complete.**

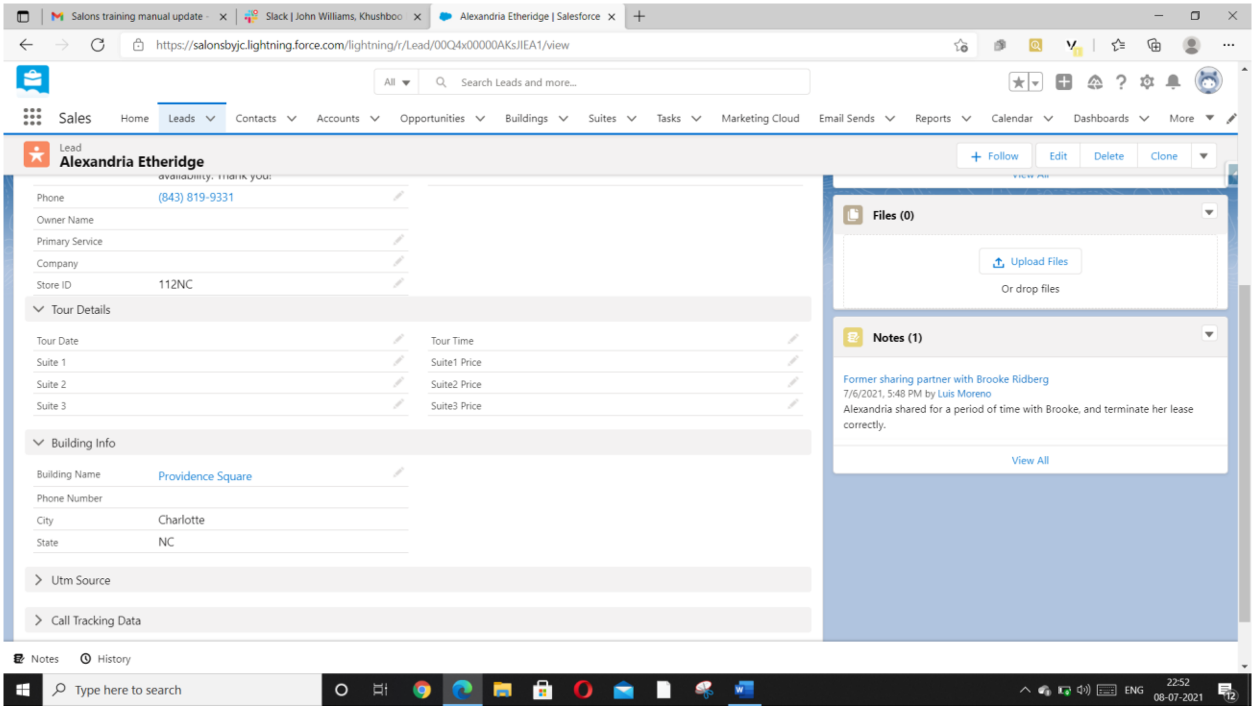
You can capture all the details regarding the lead under the **Details tab.**




Once the lead decides to schedule a tour, select the status as **Schedule a Tour** and click on **Mark as Current Status.**



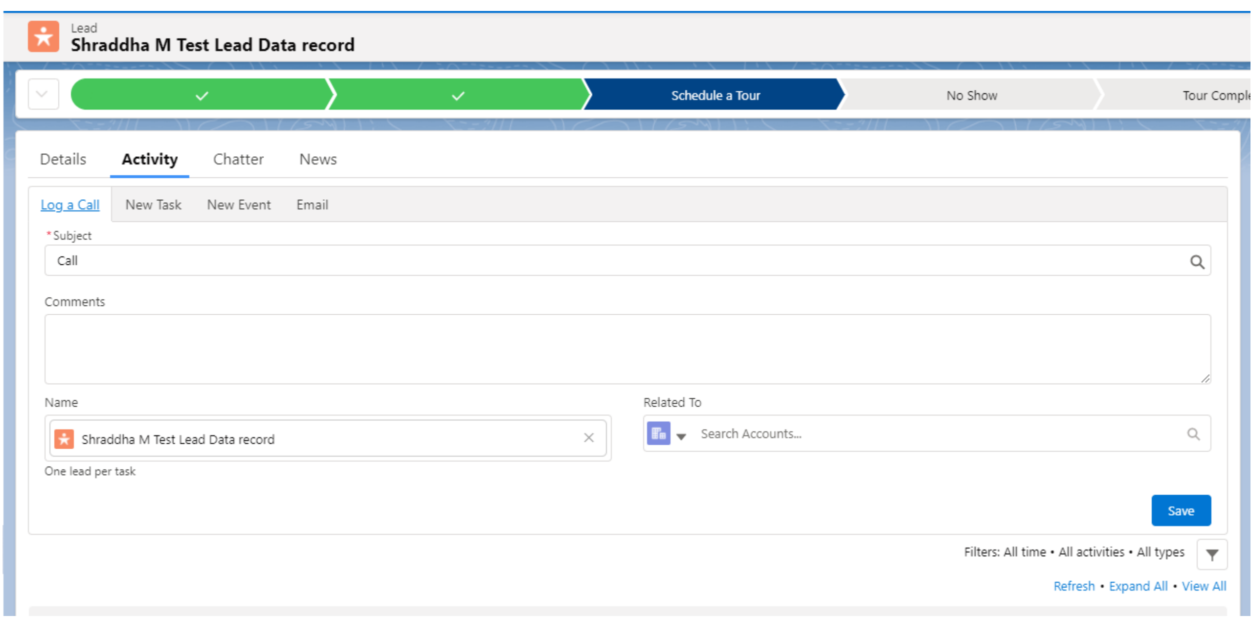

To enter information about the tour, under the **Tour Details** section click on the pencil icon against each field for a quick edit.




If the **Salon Suite prospect** does not show up for the tour, you can select the **No Show** status and select **Mark Status as Complete** to save your information.

If the **Salon Suite prospect** completes the tour, you can select **Tour Completed** and select **Mark Status as Complete** to save your information.

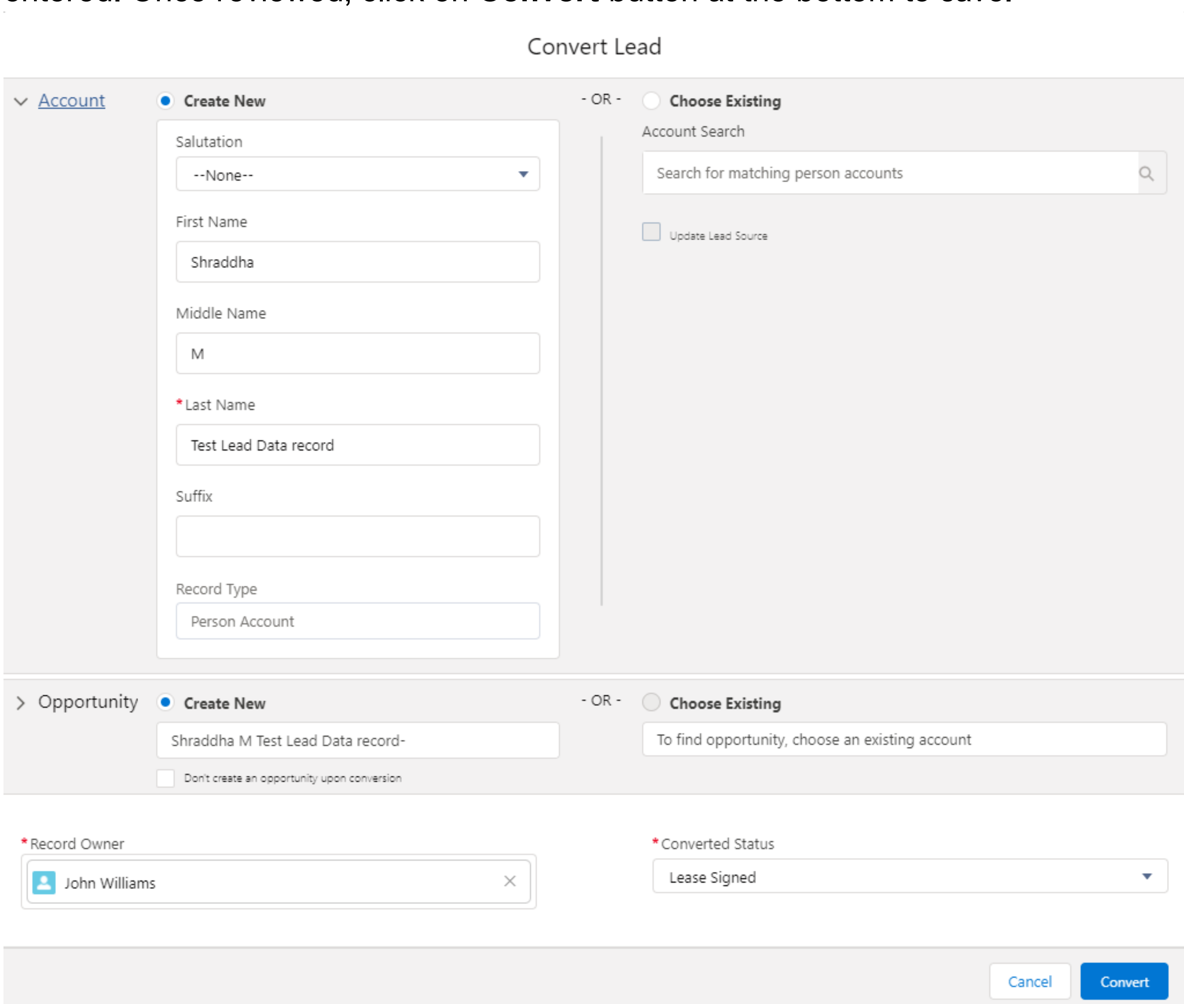
You can capture all the activities for that Lead under the **Activity Tab**.



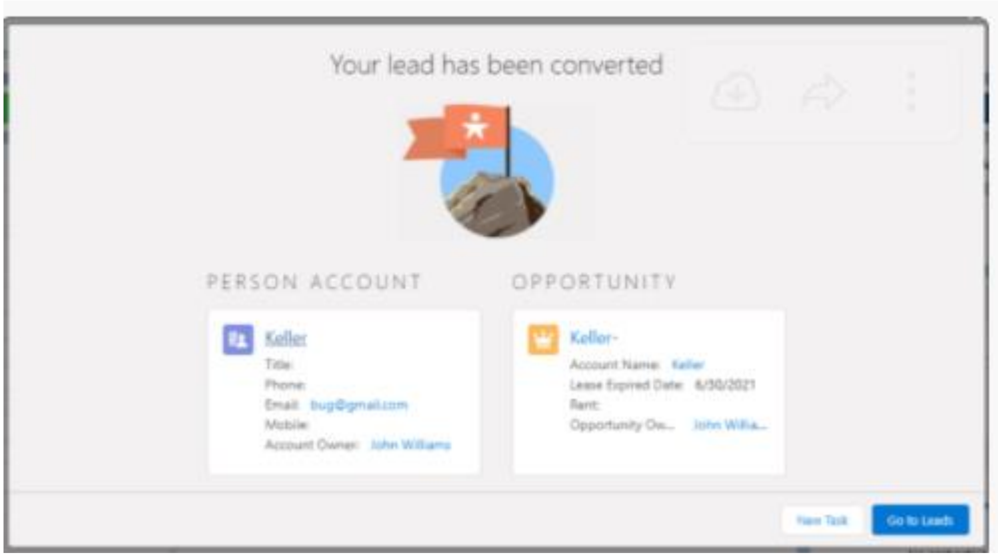
Once the lead has signed the lease, it becomes a **Contact** in Salesforce. At this time, you can create an **Opportunity** with details of the lease by clicking on the **Converted**. This will move the lead to contact and will auto create an opportunity for that contact where you can capture other details like move in date and rent.

To convert the lead to a contact, select status **Converted** and click on **Select Converted Status** to save your information.


A new window will pop up which will auto fill with all of the contact information you entered. Once reviewed, click on **Convert** button at the bottom to save.

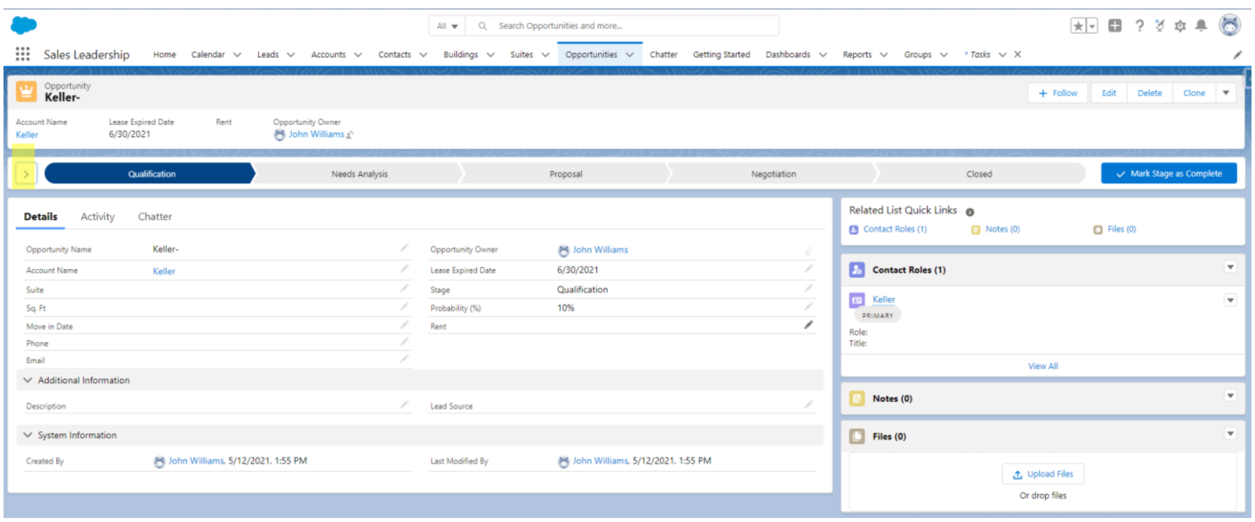


Once you click on **Convert** you will see the following message saying a **Person Account** (Contact) and an **Opportunity** is created.

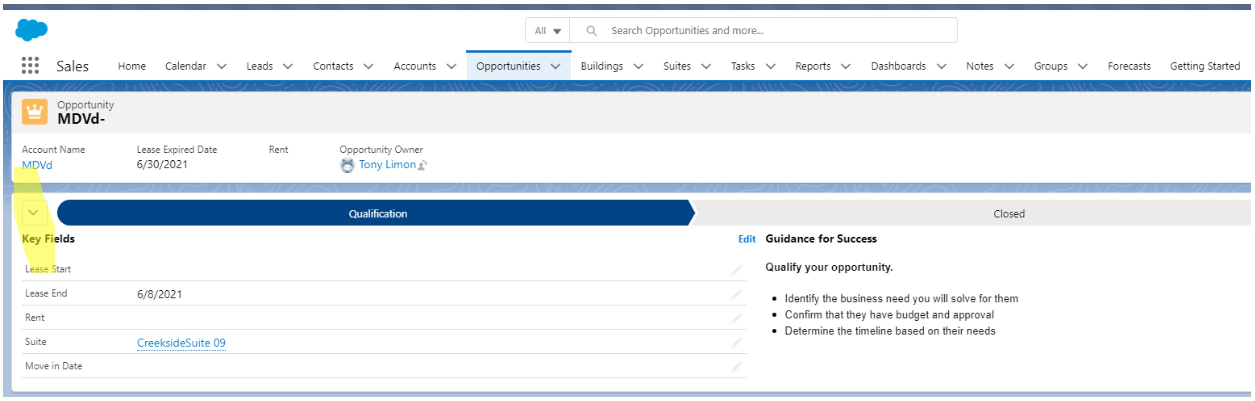



## <u>Opportunity:</u>

If you click on the Opportunity, you should be able to capture all the details regarding your tenant (salon suite owner).



On the **Opportunity** page, you will be able to see **Opportunity Stages** on the navigation bar. If you click on the arrow next to it, you will see the customer guidance for success that will list all the key fields that need to be filled out.




You can fill out the suite, lease start date/end date, etc. from the tenant.

## **<u>Suites:</u>**

You will be able to see all of your location's suite information under the Suites tab.

The list view will show all Suite Number, Square ft, and if the suite is occupied or vacant.