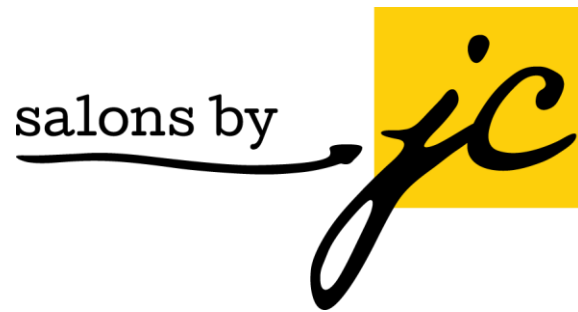
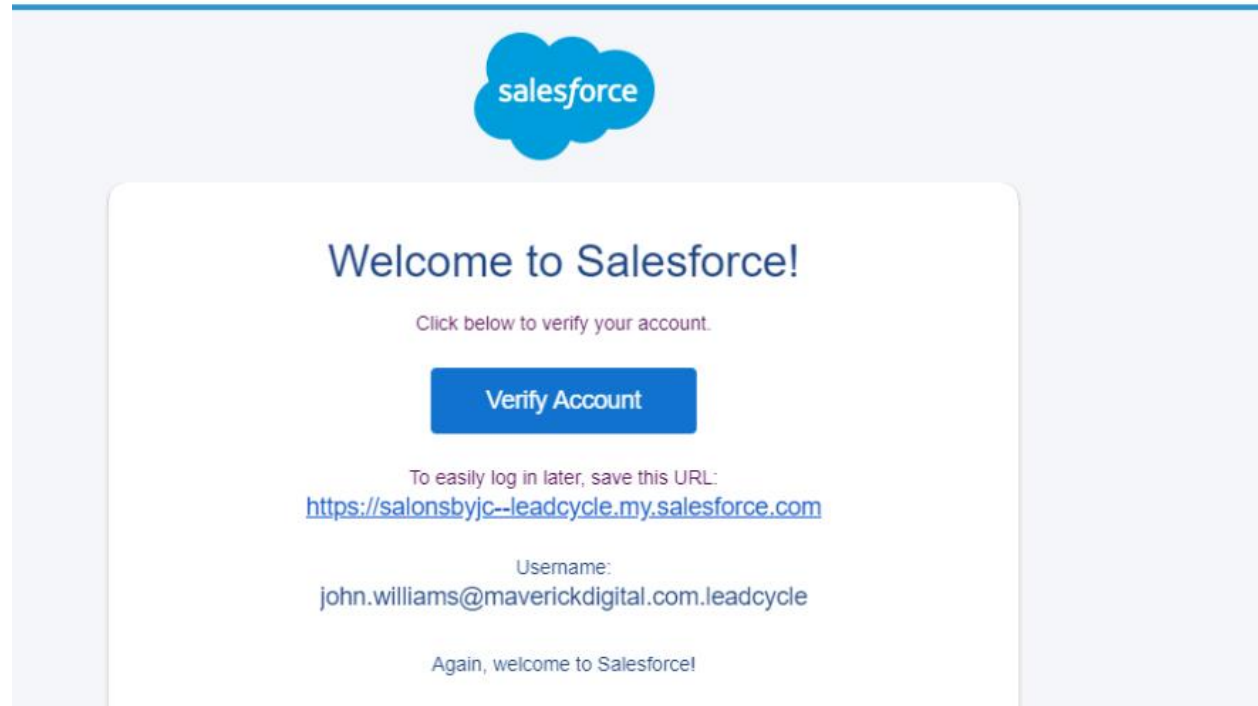




Training Guide

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:

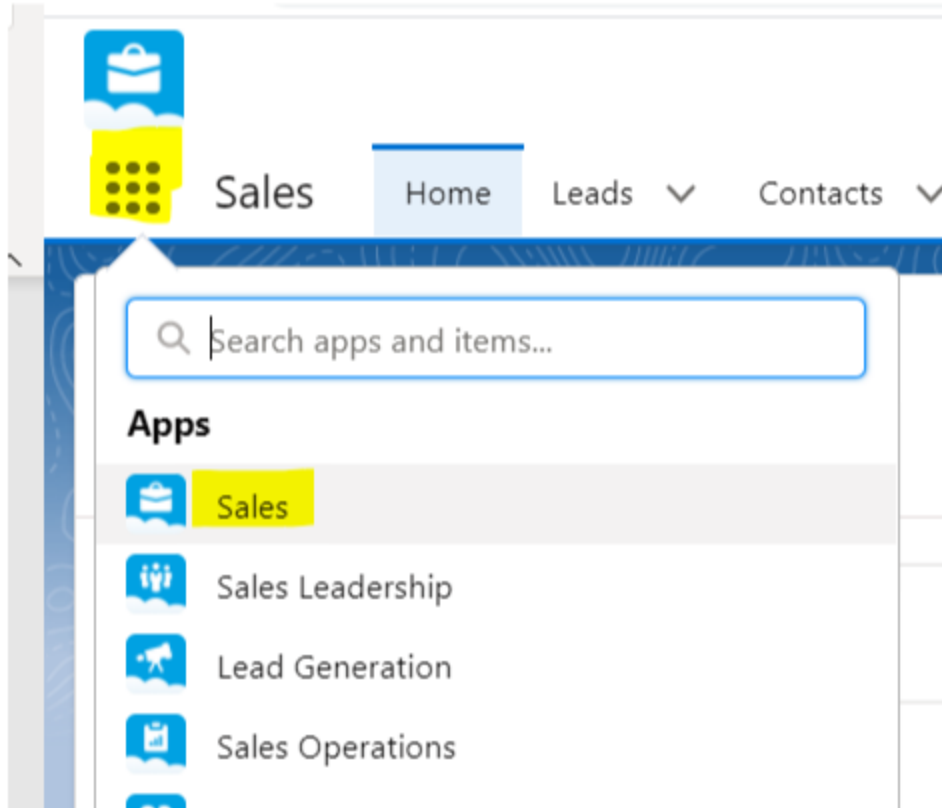
Login url: [www.login.salesforce.com](https://salonsbyjc--leadcycle.my.salesforce.com)

Username: This is your email address

Password: Password of your choice

Home Page:

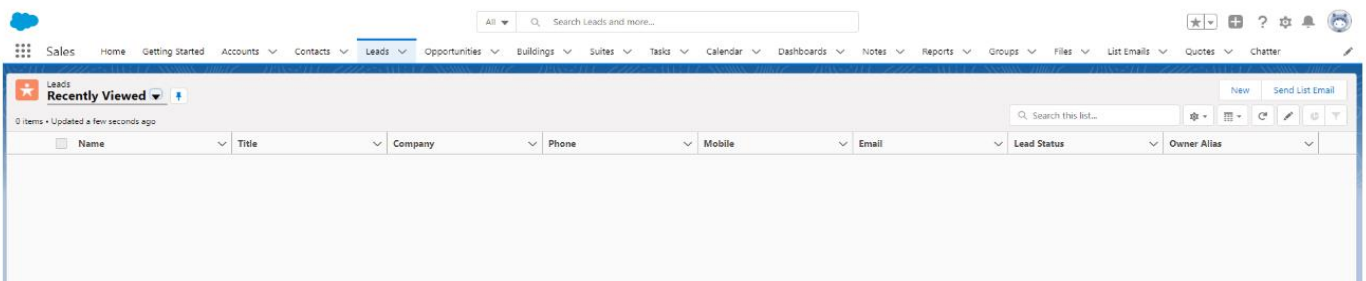
Once you login to Salesforce you will see the **Home Page screen**. Make sure you are in the Sales app. Click on the 9 dots on the upper left side and select **Sales** from the dropdown menu (see image on next page).



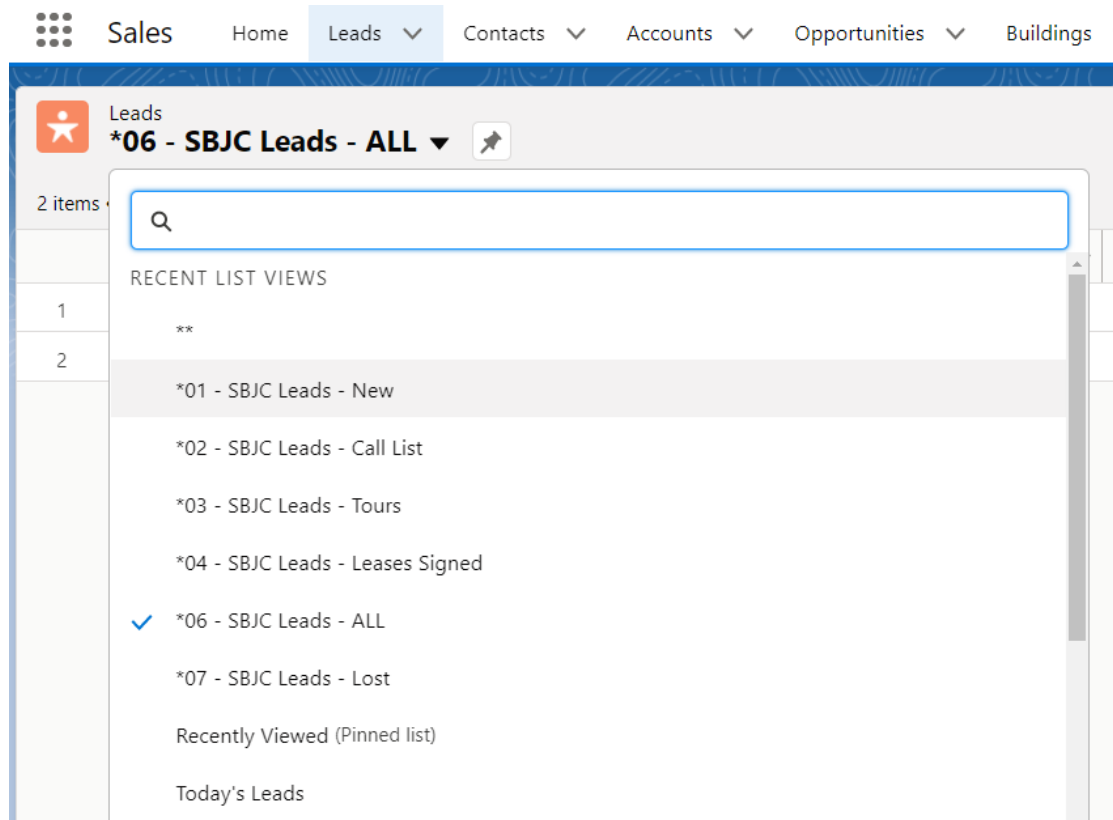
You will see different tabs at the top of your screen which will provide access to different information in the application.

Lead:

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.

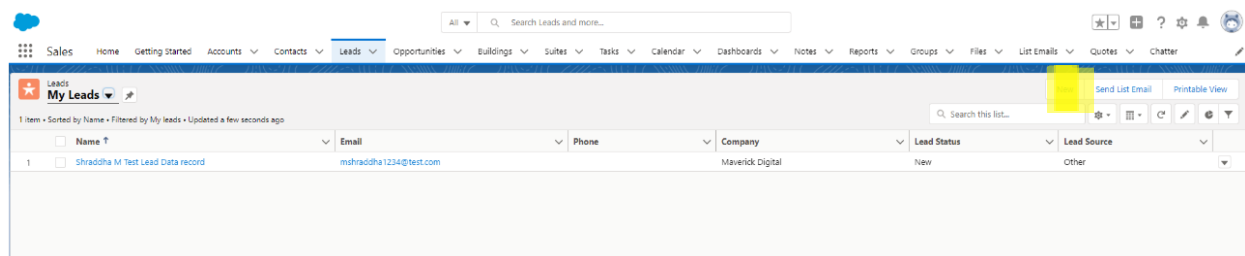


If you click on the dropdown arrow next to **Recently Viewed** different lists will appear.



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.



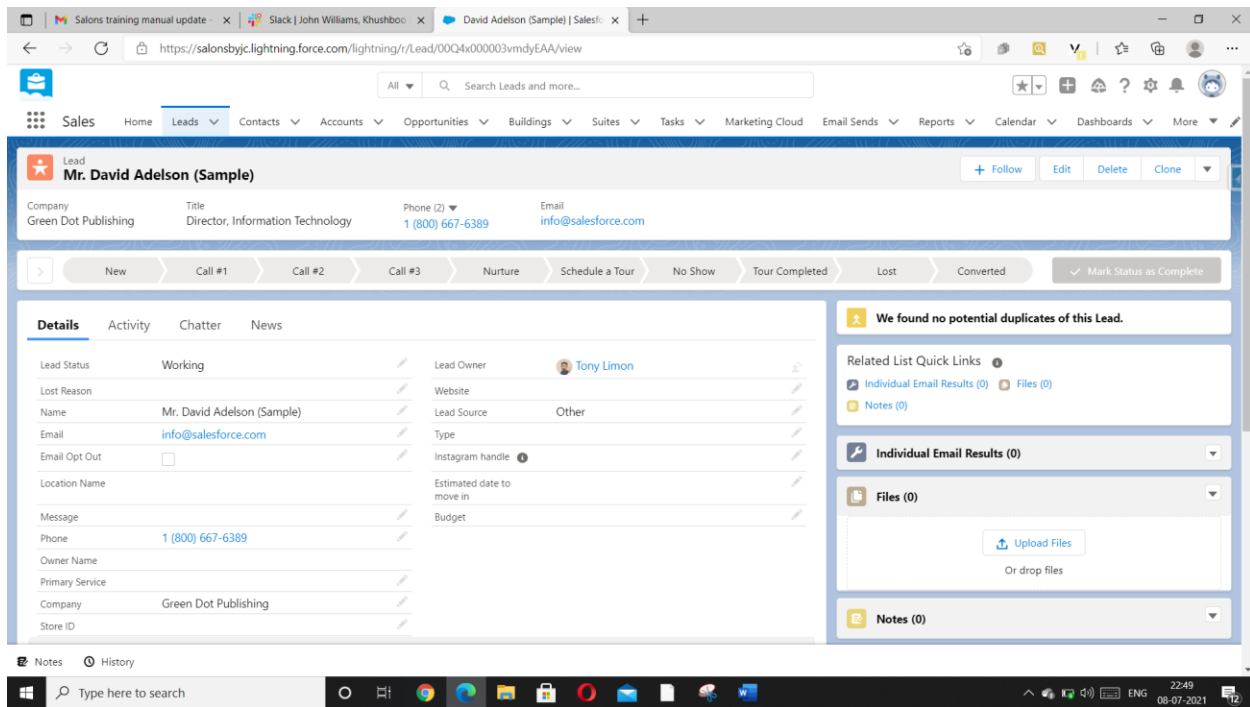
You can create a **New Lead** by clicking on the **New Button** located at the top right of the screen.

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

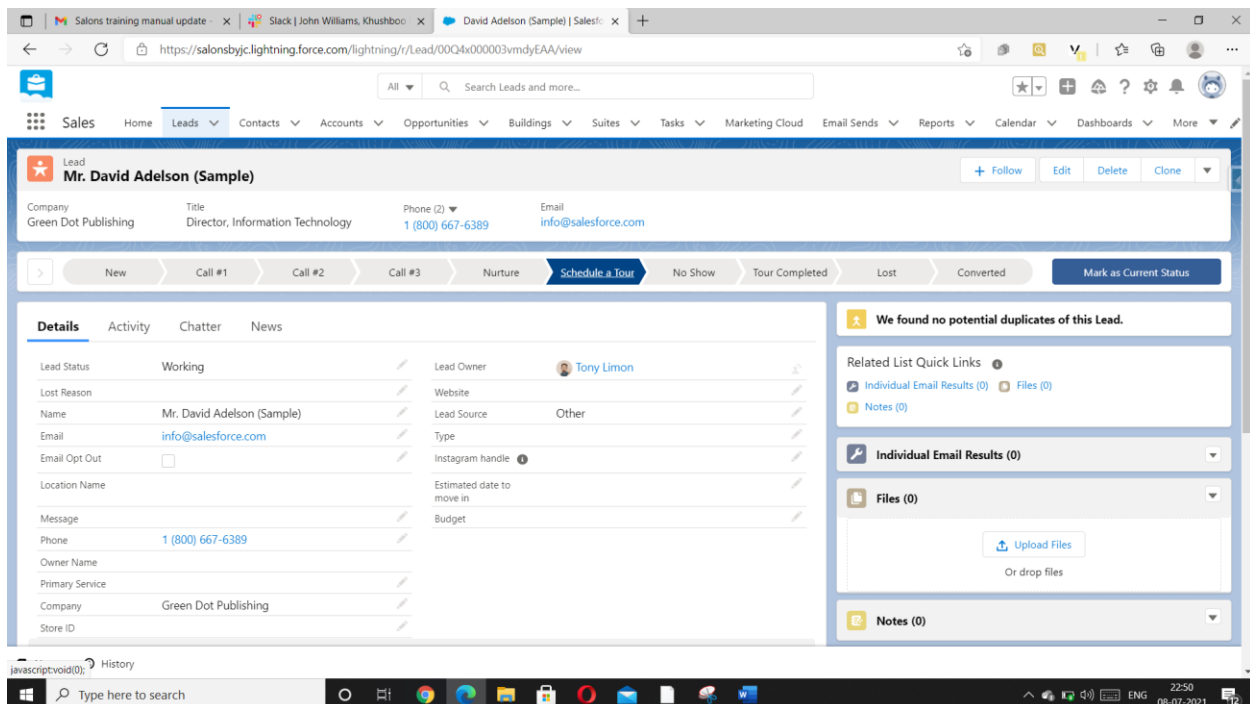
The screenshot shows the Salesforce 'New Lead' form. The form is titled 'New Lead' and contains several sections. The 'Lead Information' section includes fields for Lead Status (set to 'New'), Lost Reason (set to '--None--'), Name (with sub-fields for Salutation, First Name, Middle Name, Last Name, and Suffix), Email, Email Opt Out, and Message. The 'Lead Owner' is set to 'maverick digital'. The 'Lead Source' is set to '--None--'. The 'Type' is set to 'Phone Call'. The 'Instagram handle' and 'Estimated date to move in' fields are empty. At the bottom, there is a checkbox for 'Assign using active assignment rule' and buttons for 'Cancel', 'Save & New', and 'Save'. The background shows the Salesforce interface with a list of leads on the left and a sidebar on the right.

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.

Lead: **Alexandria Etheridge**

Phone: (843) 819-9331

Owner Name: [Edit]

Primary Service: [Edit]

Company: [Edit]

Store ID: 112NC

Tour Details

Tour Date	Tour Time
Suite 1	Suite1 Price
Suite 2	Suite2 Price
Suite 3	Suite3 Price

Building Info

Building Name: Providence Square

Phone Number: [Edit]

City: Charlotte

State: NC

Utm Source: [Edit]

Call Tracking Data: [Edit]

Files (0)

Upload Files

Or drop files

Notes (1)

Former sharing partner with Brooke Ridberg
7/6/2021, 5:48 PM by Luis Moreno
Alexandria shared for a period of time with Brooke, and terminate her lease correctly.

View All

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**.

Lead: **Shraddha M Test Lead Data record**

Activity Tab: Log a Call, New Task, New Event, Email

Subject: Call

Comments: [Text Area]

Name: Shraddha M Test Lead Data record

Related To: Search Accounts...

One lead per task

Save

Filters: All time • All activities • All types

Refresh • Expand All • View All

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.

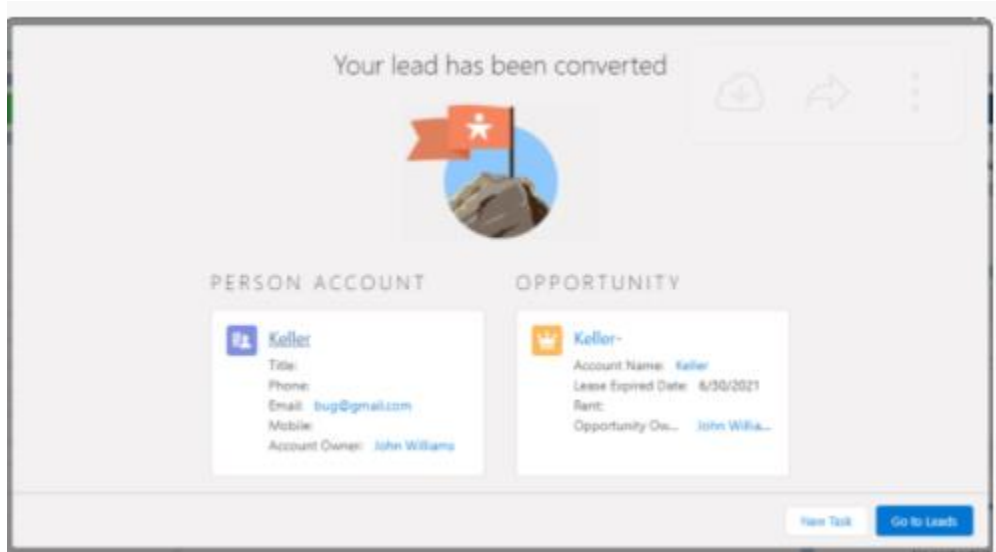
To convert the lead to a contact, select status **Converted** and click on **Select Converted Status** to save your information.

The screenshot shows the Salesforce interface for a Lead record titled "Shraddha M Test Lead Data record". At the top, there are buttons for "Follow", "Edit", "Delete", and "Clone". Below this is a progress bar with stages: "Schedule a Tour", "No Show", "Tour Completed", "Converted", and "Select Converted Status". The "Converted" stage is currently selected. On the left, there are tabs for "Details", "Activity", "Chatter", and "News". The "Details" tab is active, showing fields for "Lead Status" (Schedule a Tour), "Lead Owner" (John Williams), "Name" (Shraddha M Test Lead Data record), and "Website". On the right, there is a message: "We found no potential duplicates of this Lead." and a section for "Related List Quick Links" with links for "Files (0)" and "Notes (0)".

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.

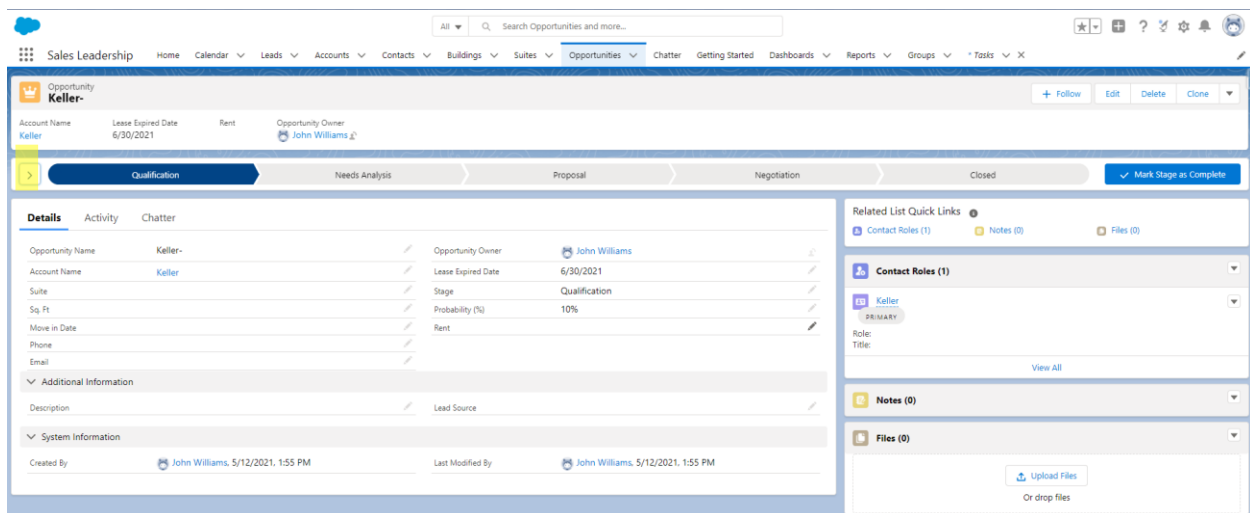
The screenshot shows the "Convert Lead" dialog box in Salesforce. It has two main sections: "Account" and "Opportunity". In the "Account" section, the "Create New" radio button is selected. The form fields are filled with: "Salutation" (None), "First Name" (Shraddha), "Middle Name" (M), "Last Name" (Test Lead Data record), "Suffix" (empty), and "Record Type" (Person Account). The "Choose Existing" option is also visible with an "Account Search" field. In the "Opportunity" section, the "Create New" radio button is selected. The "Opportunity" field is filled with "Shraddha M Test Lead Data record-". There is a checkbox for "Don't create an opportunity upon conversion" which is unchecked. At the bottom, there are fields for "Record Owner" (John Williams) and "Converted Status" (Lease Signed). The "Convert" button is highlighted in blue at the bottom right.

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



Opportunity:

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.

Opportunity MDVd-

Account Name: MDVd, Lease Expired Date: 6/30/2021, Rent: , Opportunity Owner: Tony Limon

Qualification Closed

Key Fields

Lease Start

Lease End: 6/8/2021

Rent

Suite: CreeksideSuite 09

Move in Date

Guidance for Success

Qualify your opportunity.

- Identify the business need you will solve for them
- Confirm that they have budget and approval
- Determine the timeline based on their needs

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

Suites:

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.

Suites All Suites

50+ items • Sorted by Suite Number • Filtered by All suites • Updated a few seconds ago

Search this list...

	Suites Name	Suite Number	Square ft	Vacant
1	Observatory Park, Suite9	Suite9	100	Occupied
2	Observatory Park, Suite8	Suite8	113	Occupied
3	Observatory Park, Suite7	Suite7	106	Occupied
4	Observatory Park, Suite6	Suite6	102	Occupied
5	Observatory Park, Suite5	Suite5	109	Occupied
6	Observatory Park, Suite4	Suite4	101	Occupied