Issue #1 - April 18, 2018

BPE BURT | PROCESS EQUIPMENT

Go With the Flow Newsletter

Inside this issue:
✓Getting Started with Salesforce

Contents: ****Welcome Message* *What is Salesforce* *Motto* *Salesforce Tidbits* *Glossary* *Much More****

A Message from Steve Burt

Welcome BPE to the first in a series of "Go With the Flow" Salesforce Newsletters that will provide us with useful information and tips as we enter into the new world of Salesforce collaboration!

President
Steve Burt

As you may recall, it was March last year when I sent you an e-mail that let you know about the commitment Burt Process had made to this thing called "Salesforce" a new Business Management Ecosystem. Well the implementation took a bit longer than anticipated. However, I have been assured, and have no doubt, that the time and attention to detail was well worth the investment. We will reap the benefits for many years to come of all the hard work and countless hours that Stacey, her team, and many of you that helped with the workflows and testing invested over this past year.

This platform will be an integral part of the foundation that will enable our vision to collaborate internally as well as with our customers and vendor partners to be a global leader in providing solutions to water treatment and process challenges that will ultimately improve the quality of life for many. Please join me in embracing this new and exciting technology to help us get better at what we do even faster!

BPE will be implementing Salesforce in phases.

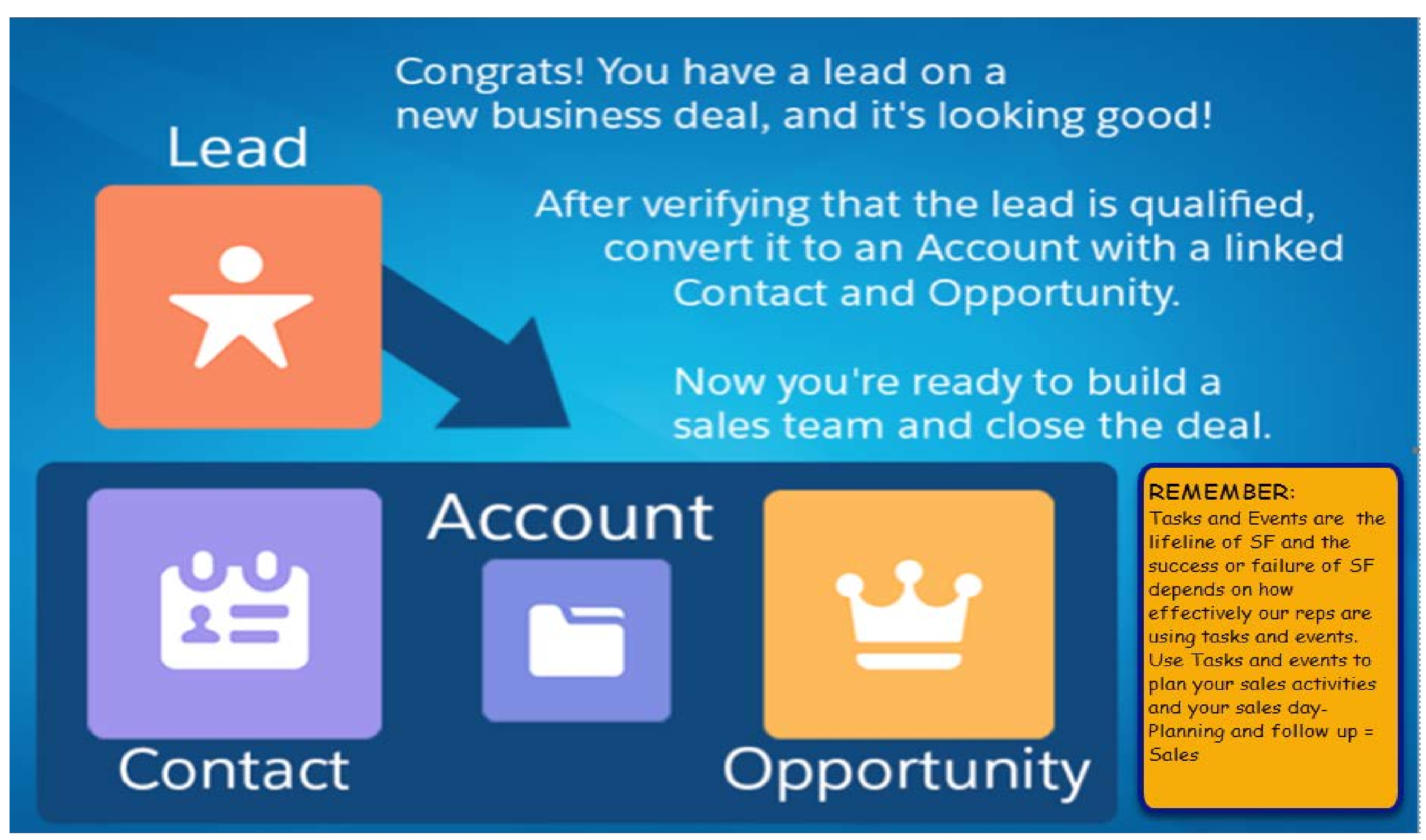
<u>Phase 1A:</u>

Customer Service & Sales (Inside Sales, Outside Sales & Manufacturing):

>Distribution Sales
>Manufacturing Sales
>Technical Support
plus...>IT Help Desk

<u>Future phases:</u>

>Collections >RMA
>BPE Data
>Purchasing Confirmation
>Customer Satisfaction
>Field Service Support
>Salesforce Pardot - Marketing



Important Documents for Salesforce including Salesforce Glossary, Basic User Training, Salesforce for Outlook, and Salesforce for your mobile device can be found at:
<u>\\SSERVE\General\Salesforce 2017\SF Training Documents</u>

Our Motto...
Your Motto...
Everyone's Motto...

"If it's not in *Salesforce*, it doesn't exist."

Below is the list of forum members who will be advocating for you!

Caitlyn Allgaier
Representing...BPE Data

Jonathan Dearborne
Representing...Customer Service

Jennifer Harriss
Representing...Inside Sales

Kathy Kelsey
Representing...Account Receivable

Matt Liuzzo
Representing...Tech Support

Kyle Kalinowski
Representing...Manufacturing Sales

Chris Lopes
Representing...Outside Sales

Hannah Schlett
Representing...Office Support

Linda Kronberg
Editor in Chief Newsletter

Stacey Smart
Facilitator

BPE's Salesforce Advocate Team...
Solution Pioneers
and their Motto is...
Leading to the New Cloud

We would like to introduce you to the *Salesforce Users Forum*, this is a group of your peers who have been selected to represent each department as we move forth with the Salesforce Implementation.

They have named themselves the **Solution Pioneers.**

What do they do?
>Their job is to be an advocate for you and your co-workers.

>They will work to share and create quick tips to assist Salesforce users.

>They will help to strategize, collaborate, educate, innovate and transform our business.

>They will be creating a weekly newsletter – Editor in Chief –Linda Kronberg to provide you with information and tips to help BPE succeed within Salesforce.

>They will encourage Salesforce Success and adoption.

>This forum will allow you and your colleagues to bring forth the good, the bad and the ugly. Reach out to your representative if you have concerns, problems or ideas to enhance Salesforce.

>They will be the people who will add action items to our Enhancement list along with ITS.

They are your Advocate!

They support and promotes the interests of a cause or group and impact change.

Your Advocate will be:
An Observer
A Resource
A communicator
Your voice

Motto **If it's not in *Salesforce*, it doesn't exist!**

Salesforce tidbits brought to you by the **Solution Pioneers Team**

BPE's Salesforce Advocate Team...
Solution Pioneers
and their Motto is...
Leading to the New Cloud

Managing Stress with the Transition to the Cloud

Contributed by...Jennifer Harriss

The BPE transition to *Saleforce* is upon us and, with this change, individuals may experience stress. Change brings in a realm of uncertainty that can be unsettling for some but there are numerous ways that these feelings can be dealt with when they arise or are avoided. During this exciting shift in our work processes moving to *Saleforce*, it is important to remember that you are not alone and that we will get through this together by working as a team.

Saleforce is bringing a positive change to BPE as we move forward to embrace an innovative Customer Relations Management(CRM) package that will help us to effectively support our customers and close internal gaps. With this change, we need to prepare ourselves mentally as change is not always easily encountered. Let's think back to our days in school and the challenges of having new teachers, learning new materials, project deadlines, working with new people, etc. We all made it through those changes and, sometimes alone. This time the **Solution Pioneers** are ready to ***"Lead the way to the new cloud"*** and to help you through the transition with the Good, the Bad, the Ugly and the Beautiful.

There are many ways to manage the unsettling feelings that may develop with the transition to *Saleforce*:

Manage the stress
- Change may be out of your control; however, you control your reaction to the change
- Shift negative worrisome energy into positive problem-solving or planning energy
- Speak up and reach out for support

Seek clarification
- If you have uncertainty in your duties, your manager or members of the Solution Pioneers Team are available to help.
- Please do not hesitate to bring your questions and feedback to the team.
- Remember, there is no such thing as a stupid question – To grow we must ask questions
- Ask your manager or a team member to set aside time to help

Work with positive people
- Refrain from engaging in negative communications as much as possible
- Engage in critical feedback by bringing forward solutions to turn around and resolve negative attributes

Look for Opportunities
- Change will open doors for new skills and new responsibilities that will further professional growth and, ultimately, your career.

Remember you are not alone in this transition and we are here to help. Let's show them how the BPE team can conquer any challenge that comes our way. The Solution Pioneers team members are just a cubicle, a call or an email away ☺

Motto **If it's not in *Salesforce*, it doesn't exist!**

BPE will be utilizing the basic Salesforce Classic platform as well as several other Salesforce Automation Tools such as Chatter.

Why Salesforce?

Unlike traditional CRM software, Salesforce is an Internet service. You log in through a browser, and it's immediately available. This is called cloud computing, where the customers access "the cloud" (that is, the Internet) for their business needs, and are not required to install any traditional software. As long as you have an Internet connection, you can be anywhere in the world and have access to the clouds.

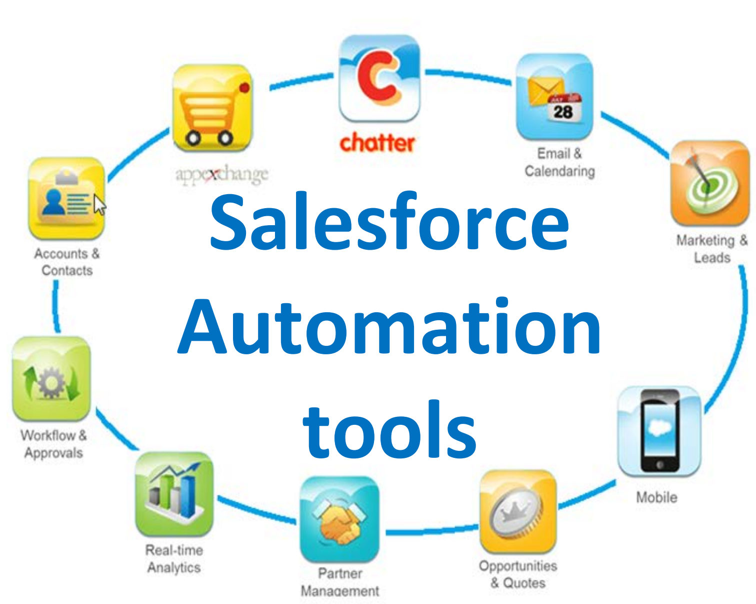
Salesforce is:

Fast
Easy
Flexible
Effective
Makes it easier to increase sales and growth

What this means to you:

For sales reps: Better visibility into Customer Information, you can see accounts, contacts, opportunities, tasks and events in one location. Easy Account Planning so they can develop an account strategy/plan complete with to do tasks, reminder and follow up dates. You can see the amount of time committed to each account and the outcome of that effort via Reports and Dashboards and Trend Analysis

For customer service: Allows you to have one place to review all request for service/communication, whether that be a request for advice, complaints, compliments, quotes, or status. You will also have better visibility into Customer Information, you can see their accounts, contacts, cases, opportunities, tasks and events in one location.



For marketers: Harness the power of social media and connect with customers in whatever way they choose. An integrated experience that extends you company's voice, reaches new audiences, and builds your customer base.
For sales managers: real-time visibility of your team's activities so you can forecast sales with confidence and report with ease.

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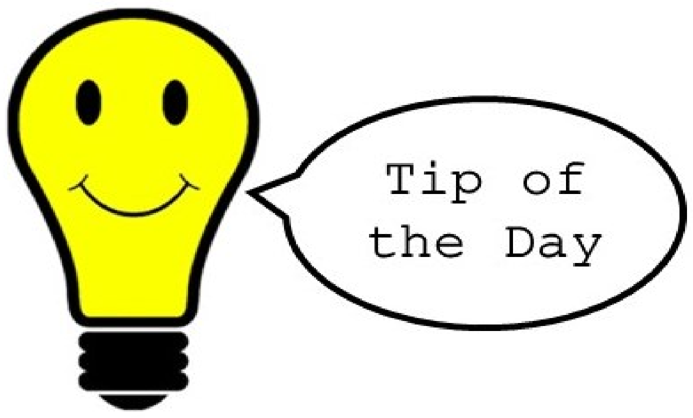

Salesforce.com Tip of the Day

Starting with Activity and Task Management

How to utilize the Salesforce Activity and Task Management features. If you use Salesforce Activity and Task Management tools it will help you and your sales team organize and manage your day in an effective manner. Here is what you can do using Salesforce Activity and Task Management

What Sales reps can do using Activity and Task Management

- Schedule tasks and events
- Prioritize your tasks and events by due date
- Classify Tasks and Events (using custom fields)
- Generate automatic alerts to remind

What Managers can do using Activity and Task Management

- Assign tasks to your team members
- View progress of the tasks of your team
- Monitor where your subordinates are spending time

Difference between Tasks and Events

- Tasks are items TO-DO that have a target end date. For example "Send Proposal", "Payment Follow up with Contact". Tasks do not have a start date / time.
- Events are calendar items that have a Start Date / Time and End Date / Time and usually involve other persons. Examples are "Meeting with XYZ Client at their Office between 3-4 PM" or "Telecom between 10-11 am with John"

Why tasks and events are important?

The importance of tasks and even management in Salesforce can be ascertained from the fact that they are given the space on the home page. Tasks and Events are like the lifeline of CRM and success or failure of CRM depends on how effectively sales reps are using tasks and events. Use Tasks and events to plan your sales activities and your sales day.

JUST FOR FUN

SALESFORCE POEM

JUST FOR FUN

There will soon be a Salesforce CASE
That will put a smile upon your face

And when it converts to a LEAD
We will all succeed

And help it to become an OPPORTUNITY
That will benefit the whole Burt community

Make it a QUOTE
And all will take note

And, as it becomes a P21 ORDER
Another case will be waiting right around the corner!

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Account

An organization, company, or partner that you want to track - for example, a partner organization, a Foundation, another nonprofit, a school, or a company where your contact is employed. In Salesforce, all contacts are tied to accounts.

App

Short for "application." Basically, an app is a collection of components such as tabs, reports, dashboards, and **Visualforce pages** that address a specific organizational need. *Salesforce.com* provides standard apps such as Sales and Marketing. You can create a custom app or download other apps from the **AppExchange**.

AppExchange

A sharing interface from *Salesforce.com* that allows you to browse and share apps and services for the Force.com platform via the web. The **AppExchange** allows you to extend the functionality of Salesforce with Apps for things like: sending bulk email; managing volunteers; ticket sales; online donation processing, and more.

Campaign

A series of tactics and/or programs designed to achieve a certain organizational objective. And it might include tactics like mass email, events, direct mail, and advertising

Chatter

Employees can "follow" both people and documents to collaborate on sales opportunities, service cases, campaigns, projects and tasks. Easily ask for assistance.

Cloud Computing

A model for software development and distribution where the technology infrastructure for a service, including data, is hosted on the Internet. This allows users to develop and use services with Internet browsers instead of investing in hardware, software, or maintenance.

Contact

Contacts are those individuals associated with your organization. All contacts must be associated to an account unless they are a private "person" account.

Custom Object

Custom records or fields that are grouped together and that allow you to store information that is unique to your organization. You can use custom objects to manage your unique programs and services.

Dashboard

A visual representation of your report data. It gives you a real-time snapshot of your outcome measurements and key evaluation indicators. Click on a dashboard to see the report from which it is created.

Email Alert

Email alerts are workflow and approval actions that are generated using an email template by a workflow rule or approval process and sent to designated recipients, either Salesforce users or others.

Email Template

A form email that communicates a standard message, such as a welcome letter to new employees or an acknowledgement that a customer service request has been received. Email templates can be personalized with merge fields, and can be written in text, HTML, or custom format.

Field

A part of an object that holds a specific piece of information, such as a text or currency value.

Field Dependency

A filter that allows you to change the contents of a picklist based on the value of another field.

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Field-Level Security

Settings that determine whether fields are hidden, visible, read only, or editable for users based on their profiles. Available in Enterprise, Unlimited, and Developer Editions only.

Lead

A visual representation of your report data. It gives you a real-time snapshot of your outcome measurements and key evaluation indicators. Click on a dashboard to see the report from which it is created.

Object

An object allows you to store information in your Salesforce.com organization. The object is the overall definition of the type of information you are storing. If you are familiar with Excel, you might think about an object as a worksheet or a table. "Contacts" is a standard object in Salesforce CRM.

Opportunity

An opportunity is a transactional activity that you want to track, product sales, fee-for-service activities, or any other financial transaction

Organization (or org)

An organization is the virtual space provided to an individual customer of salesforce.com. Your organization includes all of your data and applications, and is separate from all other organizations.

Profile

A profile in Salesforce is a group of settings and permissions assigned to a user. Profiles controls what a user can do in Salesforce. There are standard profiles. Or you can create custom profiles. These are different from an individual Chatter profile.

User Acceptance Testing (UAT)

A process used to confirm that the functionality meets the planned requirements. UAT is one of the final stages before deployment to production.

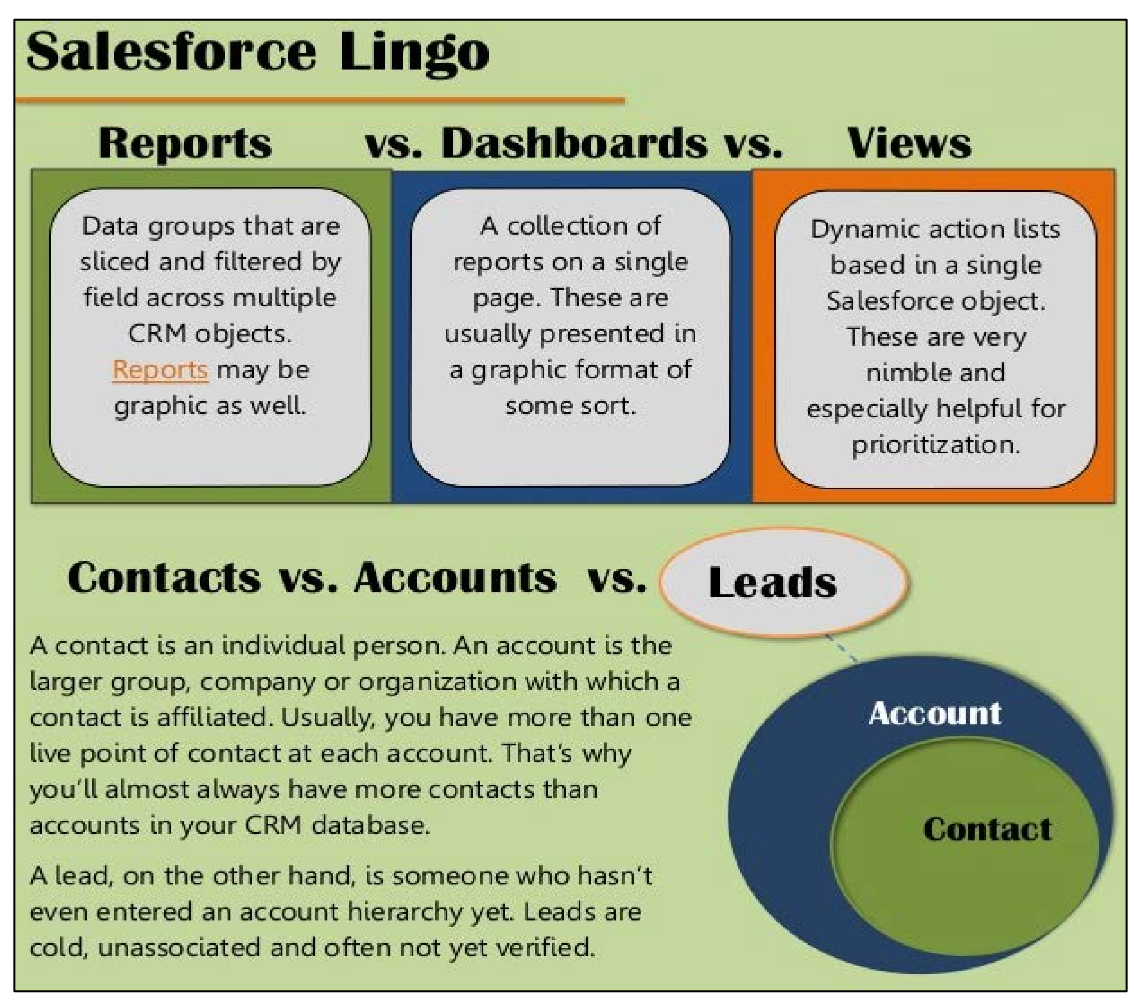
Validation Rule

A rule that prevents a record from being saved if it does not meet the standards that are specified.

Workflow & Approval Actions

Workflow and approval actions consist of email alerts, tasks, field updates, and outbound messages that can be triggered by a workflow rule or approval process.

Salesforce Basics



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