



# Go With the Flow Newsletter

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## A Message from the Editor-in-Chief, Linda Kronberg



**Editor-in-Chief  
Linda Kronberg**

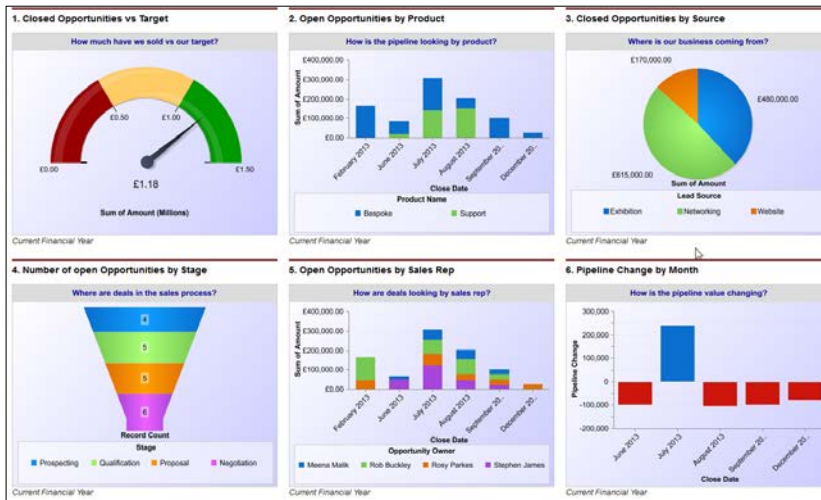
Welcome to the second edition of the BPE *Go With the Flow* Salesforce Newsletter. I hope everyone enjoyed reading our first issue! Our goal is to move to an electronic version of the newsletter within the next month or so, which will provide a better platform for communicating information and linking content electronically. We welcome your feedback regarding the newsletter content or any other suggestions that you have.

I also want to thank the members of the Solution Pioneers Team for not only working as Salesforce Advocates but also for offering to provide weekly articles for the newsletter. Last week, Jennifer Harriss contributed an article about managing stress as we move forward with our Salesforce launch and, this week, Matt Liuzzi has contributed an article about Tech Solution Articles, which will be included in Salesforce.

We now have about forty or so Users up-and-running in Salesforce and most Users have already completed training on the Salesforce Basics. Over the course of the past week, Salesforce Users have been working on Daily Assignments, which are focused on providing lesson plans and practical hands-on exercises in Salesforce. Everyone has done an excellent job in completing these assignments on a timely basis and in providing feedback for each assignment. The feedback has been very positive and everyone seems to be quite excited about using the new system. As our "soft launch" begins in the next couple of days, we expect to see increased momentum and enthusiasm among our Salesforce Users as we look forward to a full launch within the next month and implementing future phases and enhancements.

Stacey, Miles and I thank you for all of your patience and support as we have worked to shape Salesforce into an critical business tool, which will provide enhanced company-wide communications and operational efficiencies.

## Salesforce Dashboard



*The Salesforce Dashboard is an integral part of each User's Home Page in Salesforce*

**Built-in Dashboards are immediately available for use**

Dashboards can be easily modified or created to show different data

Four types of dashboards are available (Table, Chart, Gauge and Metric)

With the click of the mouse, the User can drilldown into the data "behind" the chart

Dashboards are a graphical representation of the results from reports and provide a snapshot of key metrics and performance indicators



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





## Tech Solutions Articles in Salesforce



Contributed by...*Matt Liuzzo*



With the release of Salesforce, we are also launching a BPE maintained knowledge base to be integrated into Cases. This will allow for the Distribution Technical Support staff to write articles about frequently asked questions, necessary information, or useful tricks. As it is built up and maintained, this collection should prove to be a valuable resource for not just distribution, but hopefully the company as a whole.

### Your Advocates...

#### **The Solution Pioneers Team**

**Caitlyn Allgaier**  
BPE Data

**Jonathan Dearborne**  
Customer Service

**Jennifer Harriss**  
Inside Sales

**Kathy Kelsey**  
Account Receivable

**Matt Liuzzo**  
Tech Support

**Kyle Kalinowski**  
Manufacturing Sales

**Chris Lopes**  
Outside Sales

**Hannah Schlett**  
Office Support

**Linda Kronberg**  
Editor in Chief Newsletter

**Stacey Smart**  
Facilitator

#### How will this work?

Upon the launch of Salesforce, the tech support staff will have the ability to flag a case for a Tech Solutions article review. A typical Case that would require an article might be a question that's been repeatedly asked but has a simple answer or it might be a simple procedure to identify a common obsoleted part and specify its replacement. Once the case is flagged, a task is made in Salesforce for the responsible technical support representative to write a brief article for management review. If passed, the article is entered into the database and can be referenced in cases, via Chatter, or searched for directly. As Salesforce continues its development, this functionality will be brought into other areas for members of other support groups to write their own articles.

#### How will this Help?

Tech Solutions are a unique resource in that we will all be able to both contribute and gain something from them. As the database develops, we will be able to become a bit more efficient as more "tribal knowledge" will become available at our fingertips. We won't need to rely as much on one another for the simple questions, and can instead focus on tackling the tough problems we see on the day to day.

*Motto*

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

