Editor-in-Chief

Linda Kronberg

## BPE BURT | PROCESS

### Go With the Flow Newsletter

Contents: \*Message from the Editor\* \*Salesforce Tidbits\*



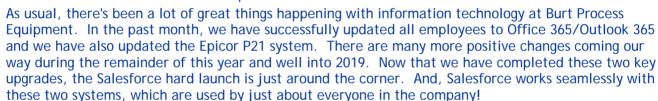
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✓ Password Management

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

Welcome to the 13th edition of our newsletter, which is coincidentally being published on the 13th!

For some reason, the number 13 seems to have a lot of history and some interesting folklore associated with it. And, along those lines, we're all aware of the wonderful baker's dozen when it comes to bakery treats - yummo! Believe it or not, there are a lot of businesses that have adopted a "baker's dozen" mentality for success and customer satisfaction. Or, in other words, there does seem to be something special about the number 13, so a lot of companies take advantage of this special number and focus on having 13 goals, 13 strategies for success, etc. Even Salesforce has developed its own list of 13 reasons sales reps love Salesforce CRM.



And, of course, the all-new BurtProcess.com website was launched by Sue Burt and her Marketing Team in November... The best just got better! Still best-in-class service, selection and price.

Burt Process Equipment has surely accomplished a lot of information technology upgrades this year!





Congratulations to Jennifer Harriss for being the first to enter all of her Target Accounts into Salesforce and for assisting her team in getting others entered into Salesforce.

Jennifer received a \$50.00 gift card to Darden Restaurants, which include Longhorn Steakhouse, Olive Garden, Bahama Breeze among others.

Thanks Jennifer for your continued efforts and willingness to adapt to Salesforce.



Salesforce tidbits
brought to you by the
Solution Pioneers
Team

### At your service...

# The Solution Pioneers & Salesforce Teams

Jonathan Dearborne Jennifer Harriss Kyle Kalinowski Kathy Kelsey Matt Liuzzo Chris Lopes

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Stacey Smart Linda Kronberg Miles Johnson

# Salesforce... "Tricks of the Trade"





Congratulations to Hannah, who has recently taken a new position in the Purchasing Department! Before Hannah took her new position, she provided the following newsletter Salesforce "Tricks of the Trade" article.

As we move along with our soft launch, we're all learning new ways to navigate through Salesforce. Each person is finding the most efficient way to get around the new CRM package and, what better way to share the new knowledge with each other, than to write a "tricks of the trade" article! Below I have laid out a few tricks that will help everyone work more efficiently in Salesforce. We also encourage people to share the quick tricks they've learned in Chatter.

#### SALESFORCE TIPS AND TRICKS

- → You're able to add multiple people to a Task by clicking on the search icon next to the Assigned To area. Then click multiple users and use the drop-down to select the Contact. This is somewhat similar to CC by email.
- →When in an Opportunity, you can add multiple people by clicking Opportunity Team add and selecting a Contact. This will give whoever you've selected the ability to also make changes on the Opportunity and would be great to use if you know you're going to be out-of-the-office for an extended time and the person will be covering for you.
- →When completing a Task from the Home screen you can click on the little 'X' next to the task and it will automatically open and have Status dropped-down to completed so all you have to do is simply hit Save.
- → The search bar is very useful and will even pull up a company by phone number.
- → There is a Recycle Bin at the very bottom of the Sidebar. Recently deleted data can be recovered from the Recycle Bin so if you accidentally delete data it can immediately be restored.

#### PLEASE SHARE YOUR SALESFORCE TIPS







In today's modern age, just about everything we do in our personal and work lives seems to require a password. And, for may of us, it gets harder and harder to remember or track these passwords. Here at Burt Process Equipment we are lucky enough to have a general password that gets us into most of the systems we work with on a daily basis. However, there are other systems that we use that require a different password such as Salesforce, Adobe Creative Cloud, Fidelity, etc.

When it comes to our personal activities, passwords are required for just about every email account, store account, bank, credit card, etc. And, although you can use the same password for each of these accounts, some systems allow for wildcard characters (!, #, etc.) and others do not. Also, there are an abundance of cyberthreats and criminals trying to steal your data, it is probably not the wisest idea to use the same exact password for every account you log into.

I'll use my dog's name as an example...it is Digby. I might decide that Digby is a unique enough name and it's doubtful that it is a widely-used or even commonly known name. So, I decide to use Digby2019# as a password for my bank account at ABC Bank and I decide that I really like this password and it is easy to remember so I will also use it for my Macy's account, my VISA card, my email, etc. Let's say I have used it for at least ten different online-related accounts. Now, my email is hacked. Guess what - the hacker is probably thinking "I bet this person used this password for all of her accounts" and, guess what, he is right!

The purpose of this article is not to scare you into thinking you will be hacked and that all of your accounts will be hacked but to remind you that passwords are a necessity in today's day and age and it is always a good idea to use complex and unique passwords and to try not to reuse the same password for all of your systems. The next page of this newsletter provides a nice infographic about passwords.

And, just in case you were wondering, where did the idea of passwords come from...passwords have been used for centuries, perhaps for several millennia. Their origin can be found in the name. A "pass word" was once simply a word that, on being spoken by one person, granted passage to another area. It is believed that passwords date back as far as the dawn of civilization and they became widely popular during Medieval times.







