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## **Salesforce Training**

### **Overview**

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## 1 Overview

Salesforce is a cloud computing service and [Customer Relationship Management \(CRM\)](#) database system. Salesforce contains contacts and mailing lists for each county, and includes various apps and features that assist users to successfully organize and analyze their data. With Salesforce, you can track new opportunities for programs and events by grouping contact information and activity in one central location.

## 2 Learning Salesforce

Before getting started with Salesforce, it is helpful to learn the fundamentals of the system. Salesforce is a robust tool with many features that aid in saving you time for completing different processes.

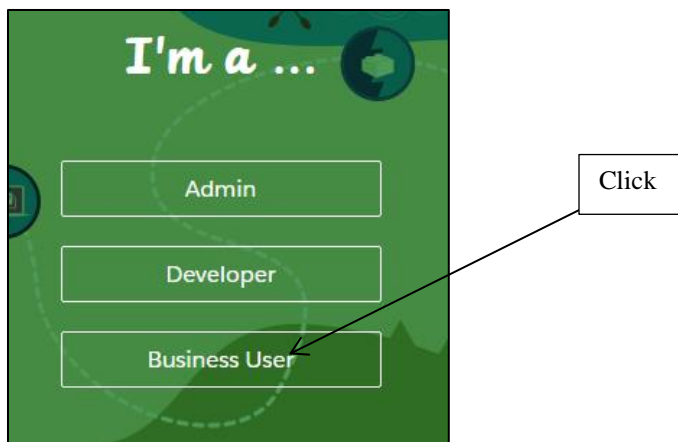
To get started with Salesforce, it is recommended that you watch the following introduction video provided by Salesforce:

<https://www.youtube.com/watch?v=r6hxqg3PgRQ>

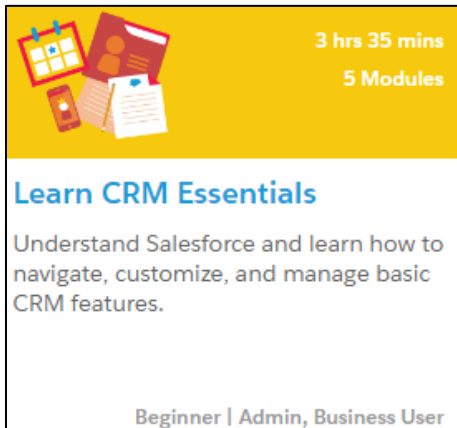
Another great resource for learning about Salesforce, which also includes more advance Salesforce topics, is Trailhead:

<https://trailhead.salesforce.com/en>

1. On the Trailhead page, click **Start learning for free**.
2. Click **Business User**.



3. Click on **Learn CRM Essentials**.



4. You can then follow through the modules for **CRM Basics, Accounts & Contacts, Leads & Opportunities, and Data Quality**.

Feel free to go through any of the other modules in Trailhead to learn more about things that you can do in Salesforce.

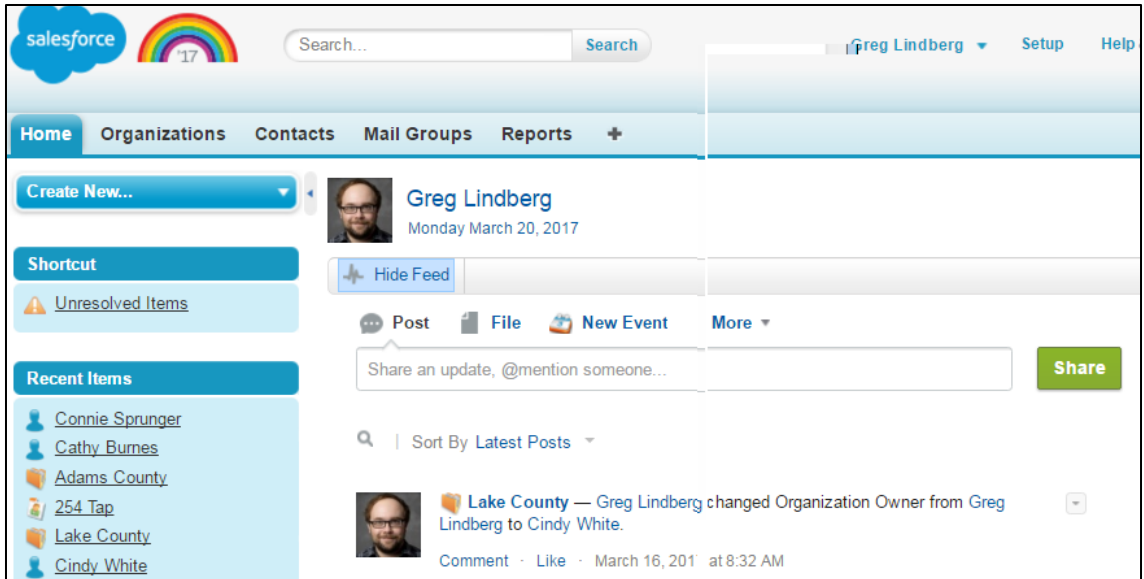
You can also learn more about Salesforce when you access the [Help & Training](#) section of Salesforce. Learn more about the Help & Training center in [Section 5: Help and Training](#).

### 3 Logging In to Salesforce

1. The first time you log into Salesforce, you will receive an email to create a password. You will then be able to log in to Salesforce.

**Note:** After logging in for the first time, you can log into Salesforce anytime by going to <https://www.salesforce.com/>.

2. You will be directed to the **Home** page for Salesforce, which includes your recent activity and a profile area where users can post on your wall (similar to Facebook).



3. If you would like to add a profile picture, click on the profile picture box and you will be directed to your profile page.
4. Click on the option to upload a picture, and select a picture from your computer to be used for your profile.

You will notice that there are five tabs at the top of the page, including **Home**, **Organizations**, **Contacts**, **Mail Groups**, and **Reports**.

#### 4 Organizations (Counties)

1. Click the **Organizations** tab.
2. Select **All Organizations** from the **View** drop-down menu, and click **Go**.
3. Locate your county, and click on your county's name.
4. You will then see your county's profile.
5. Click **Edit** to change, add, or remove information from your county's profile.

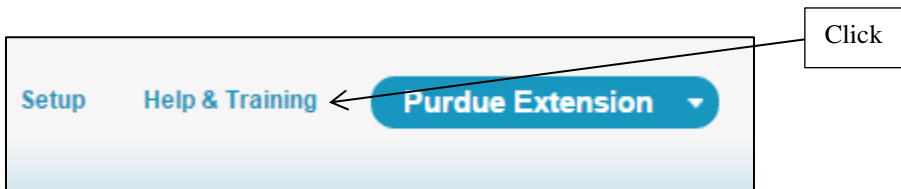
Organization Detail		Edit	Delete	Sharing
Organization Owner				Phone
Organization Name	Adams County	<a href="#">View Hierarchy</a>		Fax
Parent Organization				Website <a href="https://extension.purdue">https://extension.purdue</a>
Contact				

- If you scroll down on your county page, you will see that all of your Contacts and Mail Groups (listed as Campaigns) are visible in one place. You can choose to access either of these lists from this location.

## 5 Help and Training

Before you seek support for any questions you have regarding issues or roadblocks encountered in Salesforce, you can visit the Help and Training section to see if you can quickly find the answer to your question.

- Click **Help & Training** from the top right of the page.











- You can type any keywords for the help you are looking for in the top search bar. For example, you can search “Adding contacts” if you want to find more information about adding contacts in Salesforce.



- You can also learn more about Salesforce and various features by going to the **Get Started** section, which is great for beginners.
- Other helpful sections include
  - The **Success Community**, where you can engage with other users.
  - Documentation**, where you can browse help videos and walkthroughs.
  - Training & Certification**, where you can be certified in Salesforce topics.

- **Technical Support**, where you can contact Salesforce representatives for help.
- **Trailhead**, where you complete Salesforce learning modules.

 <h3>Get Started</h3> <p>Start your journey to success by connecting with experts, getting best practices, and learning with</p> <p><a href="#">Go</a></p>	 <h3>Success Community</h3> <p>Engage with and get answers from a passionate community of talented experts</p> <p><a href="#">Go</a></p>	 <h3>Documentation</h3> <p>Find documentation, videos, and walkthroughs to help you succeed</p> <p><a href="#">Go</a></p>	 <h3>Training &amp; Certification</h3> <p>Master Salesforce with expert-led courses.</p> <p><a href="#">Find a course</a></p>
 <h3>Technical Support</h3> <p>Access the best content to help resolve your questions or contact support</p> <p><a href="#">Go</a></p>	 <h3>Lightning Experience</h3> <p>Learn about using Lightning Experience, set it up for your org, or develop for the new user</p> <p><a href="#">Go</a></p>	 <h3>Release Readiness</h3> <p>Get ready for a new kind of customer success</p> <p><a href="#">Release Notes</a></p>	 <h3>My Success Hub</h3> <p>Navigate your Salesforce journey using a new self-service engagement console</p> <p><a href="#">Go</a></p>