

# Navigation & Collaboration Tools

## Navigation & Collaboration Tools

The objective of **navigation** is to introduce you the look & feel of Salesforce & discover how to navigate in an easy way. Chatter is a collaboration tool embedded into Salesforce that can be used for multiple purposes.



Click [on this link](#) for the full training material for navigation, [this link](#) for the Chatter User Guide, and [on this link](#) for the Lightning For Gmail user guide.



CRM first steps

## Overview

The objective of navigation is to introduce you the look & feel of Salesforce & discover how to navigate in an easy way.

You will learn about...:

- How Salesforce looks like - Look & feel
- The key Salesforce concepts and how the main objects (accounts, contacts, opportunities, customer visits, etc.) are structured and displayed
- The search functions of Salesforce - How to easily retrieve information with a google-like search function

### Chatter:

- Chatter is an application designed to enhance **collaboration** and is embedded within the tool
- You can "follow" any object or record within the tool
- Once you are following a record, you are notified when changes are made
- You can post files to share information and get feedbacks from colleagues
- Users can also make comments on objects and records
- Groups can be created to share information about specific topics (e.g. group for a specific market or region)

**Lightning For Gmail** is an application that allows to:

- Synchronize contacts from Gmail to Salesforce
- Synchronize events from Gmail to Salesforce and from Salesforce to Gmail
- Send emails from Gmail to Salesforce

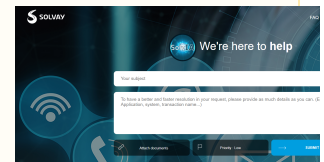
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### Need Help?

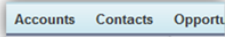
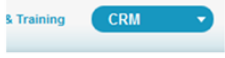
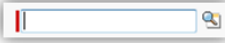
To request any support or if you have identified a bug or incident, please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



*you can copy users with email address, default priority is Low, then Submit. We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example*

## What you need to know to start...

### Salesforce terminology

| Screenshot                                                                        | Terminology         | Description                                                                                                                                                                                                    |
|-----------------------------------------------------------------------------------|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <b>Tab</b>          | Tabs are used to organize all the information stored in bridge Front Office , so that it is easier for you to find similar types of data                                                                       |
|  | <b>App</b>          | Apps contain a collection of Tabs. Users must have at least one App assigned to their Profile.                                                                                                                 |
|  | <b>Record</b>       | A Record contains all the information about a row of information you see displayed in a Tab. Similar records are stored in an Object (Table of data)                                                           |
|  | <b>Related list</b> | A Related List sits below the Record Detail page. It contains further useful information about other Records that are related to the selected Record.                                                          |
|  | <b>Field</b>        | A Record holds a number of fields, all describing attributes of that Record. When you edit a Record, you can see that there are many different types of field e.g. Text, Numeric, Lookup, List, and Check Box. |
|  | <b>Link</b>         | A link is simply a hyperlink, which may open another Record, a report or indeed another web site                                                                                                               |

The main objects used in Solvay CRM solution:

| Icon                                                                                | Terminology                                        | Description                                                                                                                                                                                       |
|-------------------------------------------------------------------------------------|----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | <b>Account</b>                                     | The object "Account" is used for capturing and managing company information.                                                                                                                      |
|    | <b>Contact</b>                                     | The object "Contact" is an individual who works for the company you are tracking                                                                                                                  |
|   | <b>Opportunity</b>                                 | The object "Opportunity" is used for capturing, managing and collaborating on sales deals                                                                                                         |
|  | <b>Reports</b>                                     | A Report is a way to summarize your data                                                                                                                                                          |
|  | <b>Dashboards</b>                                  | A dashboard is a group of charts that graphically display a summary of your opportunity pipeline information                                                                                      |
|  | <b>Activities</b>                                  | Activities facilitate collaboration by assigning tasks to team members, or reminding yourself and others of actions for an opportunity                                                            |
|  | <b>Quote</b>                                       | The object 'Quote' allows to create, manage and send quotes based on an opportunity object (growth or recurrent business)                                                                         |
|  | <b>Cases</b> (Complaint, Sample, Customer Request) | Cases are objects allowing to create and manage complaints, standard customer requests and sample requests.                                                                                       |
|  | <b>Competitor</b>                                  | The object 'competitor' is used to manage information about the competition                                                                                                                       |
|  | <b>Cross-BU lead</b>                               | The object 'cross BU lead' is used to share with another GBU/BU a business lead learned during an interaction with the market and that can potentially generate additional revenue for the Group. |
|  | <b>Competitive insights</b>                        | With the object 'competitive insights', you can register and share market intelligence obtained from customers as a result of ongoing negotiations.                                               |
|  | <b>Market segmentation</b>                         | With market segmentation object, you can define an end-use for your opportunity product and your sales and get more insights into your markets (using the corporate hierarchy).                   |