

# 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.

## 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



CRM first steps

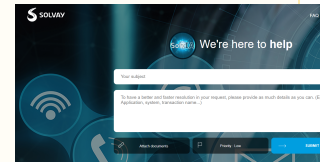
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### Need Help?

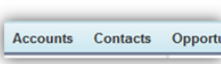



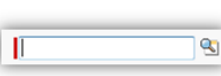
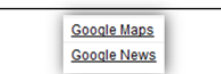
To request any support or if you have identified a bug or incident, please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>















*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 (Complaint, Sample, Customer Request)</b>	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).