Navigation & Collaboration Tools

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CRM first steps

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 form Salesforce to Gmail
- Send emails from Gmail to Salesforce

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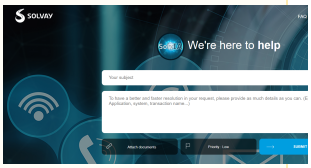
- Lightning For Gmail (LFG)

Need Help?

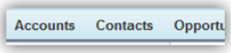
To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : https://solvia.solvay.com/



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
	**Tab**	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
	App	Apps contain a collection of Tabs. Users must have at least one App assigned to their Profile.
	Record	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)
	Related list	A Related List sits below the Record Detail page. It contains further useful information about other Records that are related to the selected Record.
	Field	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.
	Link	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
	Account	The object "Account" is used for capturing and managing company information.
	Contact	The object "Contact" is an individual who works for the company you are tracking
	Opportunity	The object "Opportunity" is used for capturing, managing and collaborating on sales deals
	Reports	A Report is a way to summarize your data
	Dashboards	A dashboard is a group of charts that graphically display a summary of your opportunity pipeline information
	Activities	Activities facilitate collaboration by assigning tasks to team members, or reminding yourself and others of actions for an opportunity
	Quote	The object 'Quote' allows to create, manage and send quotes based on an opportunity object (growth or recurrent business)
	Cases (Complaint, Sample, Customer Request)	Cases are objects allowing to create and manage complaints, standard customer requests and sample requests.
	Competitor	The object 'competitor' is used to manage information about the competition
	Cross-BU lead	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.
	Competitive insights	With the object 'competitive insights', you can register and share market intelligence obtained from customers as a result of ongoing negotiations.
	Market segmentation	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).