

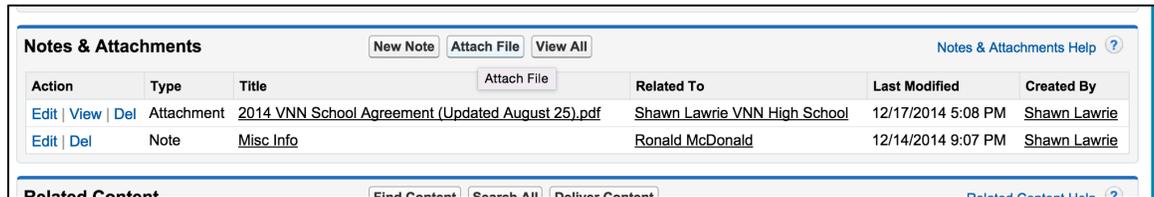
NEW SALES HAS BEEN MADE

THE SALE HAS BEEN MADE: Now that a sale has been made there are a number of steps you need to take to record this in Salesforce:

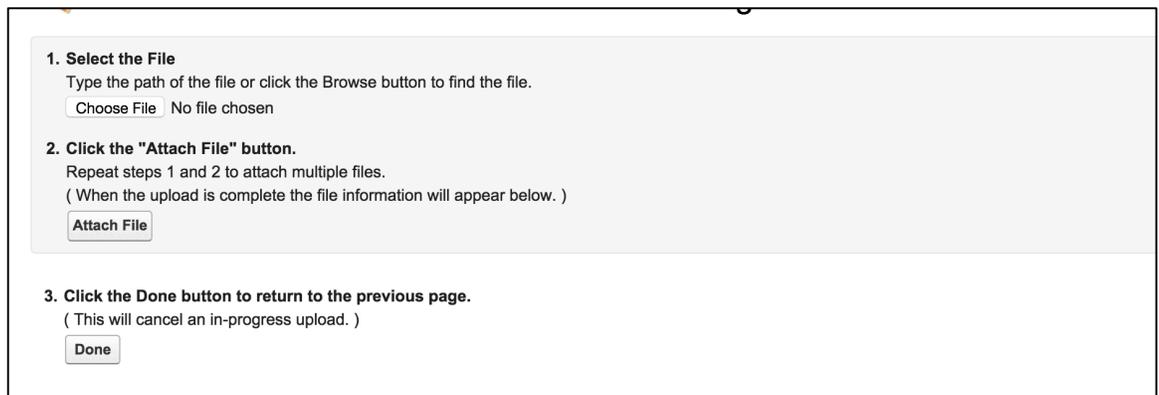
1. Upload your Contract: the contract will be uploaded to the notes and the attachment section of Salesforce. The contract **MUST** be signed by both you and the customer

How to upload a contract:

1. Go to the account screen in Salesforce
2. Scroll down the "notes and attachment section"



3. Click "Attach File"
4. Select "Choose file"



5. Find the contract on your computer and click "open"
 6. Click "attach file" – a box will pop up and disappear
 7. Click "done"
 8. This will take you back to the account screen, go back to the notes and attachment section and ensure that your contract has uploaded. You may need to refresh your browser.
2. Update your Opportunity Information: you will need to update the stage, close date, and amount (if applicable).
How to update opportunity information
 1. Search for your account
 2. Scroll down the account screen to the "opportunity" section
 3. Click on the name of the opportunity
 4. Update the fields listed above (and as shown in the picture below)
 - a. Stage = Sale Pending

- b. Amount = Final Sale Amount
- c. Close Date = the day the sale was made

Opportunity Detail			
Opportunity Owner	Shawn Lawrie [Change]	Close Date	12/20/2014
Type		Stage	Sale Pending
Opportunity Name	Shawn Lawrie VNN High School-	Presentation Scheduled Date	12/14/2014
Account Name	<u>Shawn Lawrie VNN High School</u>	Presentation Date	12/26/2014 4:18 PM
School Account		Amount	\$1,400.00
Lead Source	Purchased List	Probability (%)	99%
Type of Account	High School - Championship Package	Expected Revenue	\$1,386.00
Created from Lead	<input type="checkbox"/>	Synced Quote	
Competitor		Artwork Fee	<input type="checkbox"/>
Other	<input type="text"/>	Artwork Amount	

- 3. Update the Pricing Category: Your pricing category is how you will sell ads on the site at a later date. Most schools will be B or C pricing. A pricing category can be determined by a number of things. Talk with your director if you have any questions. You can find the pricing category under the "school account related info" section in the account screen

School Account Related Info	
AD User Name/Password Created <input type="checkbox"/>	Banner <input type="checkbox"/>
Sales Leave Behind <input type="checkbox"/>	Date Ordered
Shared Ad Space <input type="checkbox"/>	Problem: <input type="checkbox"/>
Price Category	Level B
Sponsorship Meeting with AD	

- 4. Send Welcome Letter: you will need to send this letter to your customer and copy your sales director and media coach. This letter is thanking the customer for their business as well as reminding them to schedule their site build form meeting.

How to send a welcome letter:

- a. Go to the account screen in salesforce
- b. Scroll down to the contact section
- c. Click on the customer's name you wish to send the welcome letter to – this will lead you to the "contact page"
- d. Scroll down the page to the "HTML Email Status Section" – sending an email through this section will allow you to track if the email has been opened, how many times it was opened, when it was opened, etc.
- e. Click "send an email"

HTML Email Status	
	<input type="button" value="Send an Email"/>
No records to display	

- f. Choose "select template" – the welcome letter is already drafted for you

Task **Send an Email** Help for this Page ?

Edit Email ! = Required Information

Email Format: **HTML** [[Switch to Text-Only](#)]

To:

Related To:

Additional To:

- g. Choose the "sales reps email templates" folder
- h. Then select the "new school welcome letter" template. Make sure you choose the email that has your media managers name on it i.e "new school welcome letter – Jessica"

Select a Template

https://na12.salesforce.com/email/author/templateselector.jsp

Folder:

Name	Type	Description
Artwork Needs Approval Letter	HTML	
Christmas Letter	HTML	
KHSADA Template	HTML	
New School Welcome Letter - Erin	Text	New School Welcome Letter - Erin
New School Welcome Letter - Jessica	Text	New School Welcome Letter - Jessica

- i. Make sure you fill out the proper information for the school (school name and invoice amount) – Remember to cc your sales director, media coach, and accountant (accounting@varsitynewsnetwork.com)
- j. Click "send"
- k. Navigate back to the account screen and find the "school to do checklist" – check the box next to "welcome letter sent" indicating that you have done so.

▼ **School "To Do" Checklist**

Vanity URL	List of Coaches	<input type="checkbox"/>
Welcome Letter Sent <input checked="" type="checkbox"/>	Package Type	
Site Build Form Turned In <input type="checkbox"/>	Schedule Solution/Software	
High Res Photos <input type="checkbox"/>	Add'l Schedule Info	
School Logo <input type="checkbox"/>	Sponsorship Letter	<input type="checkbox"/>

5. Create Task for Media Manager: Your support team will only know a school has been signed if you create them a task.
 - How to send a task
 - a. Go to the account screen
 - b. Scroll down to "open activities"
 - c. Click New Task

Open Activities New Task New Event Mass Update Tasks Open Activities Help ?

No records to display

- d. Complete the following information
1. Assigned to = Media Manager's Name
 2. Subject = New School to Build
 3. Type = Other
 4. Due Date = Today's Date
 5. Comments = New School to build. If you have already scheduled the site build appointment please note the date and time. If you have not, please instruct the media manager to schedule the site build appointment. If you have already completed the site build form, please upload to the notes and the attachment section and let the media manager know that it is already completed.

e. Click "save"

Task Information = Required Information

Assigned To Jessica Janiga 

Subject New School to Build 

Type Other 

Due Date 12/21/2014 [12/21/2014]

Comments New School to Build. SBF meeting is scheduled for 1/5 @ 3:00 pm
OR
New School to Build. Please schedule SBF meeting ASAP. The AD is planning to hear from you soon.

Related To Account  Shawn Lawrie VNN Hi 

Name Contact  