



Salesforce User Guide

XYZ Company

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1 About this guide

This document is divided into the following chapters:

- Chapter 1, Guide Overview
- Chapter 2, Introduction
- Chapter 3, Creating New Records in Salesforce

1.1 Typographical Conventions

This document uses the following typographical conventions:

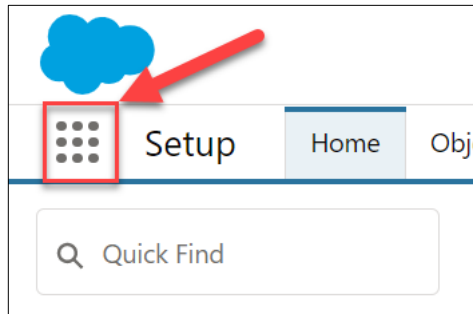
- Selection names appear in bold.
- “Click” or “Select” means to left click.

2 Creating New Records in Salesforce

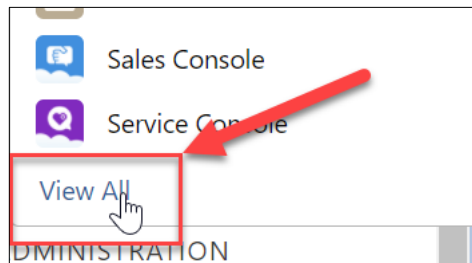
This chapter provides step by step guides on how to create new records in Salesforce.

2.1 How to Create an Account

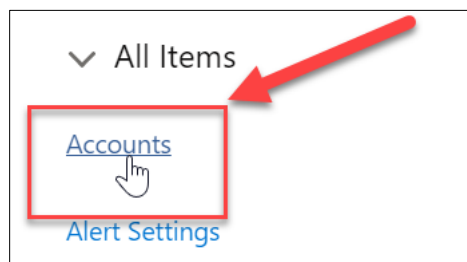
1. Click **App Launcher** in upper-left corner of page:



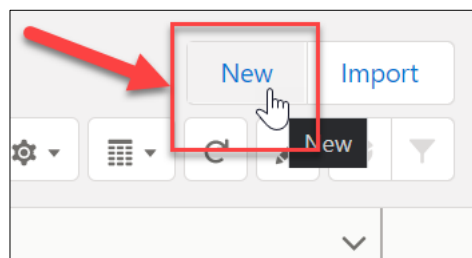
2. Select **View All** at bottom of drop-down menu:



3. Select **Accounts** in bottom-left of page:



4. Once on Accounts page, select **New** in top-right corner of page:



5. Fill out **Account Name** and other appropriate fields:



Account Information

Account Owner
Ross Shelton

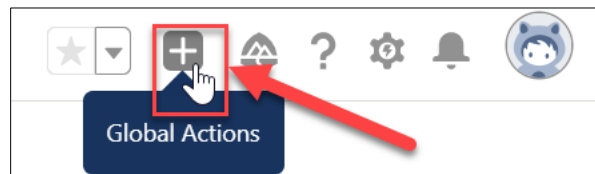
* Account Name

Please fill out this field.

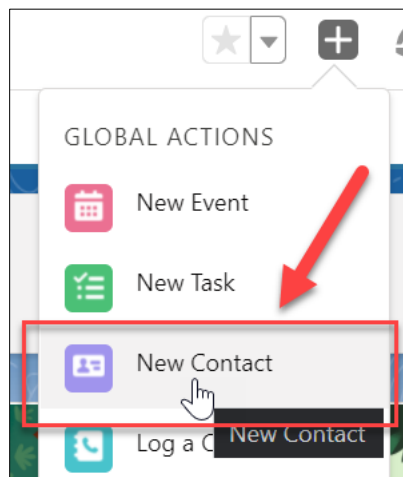
Detailed description: This screenshot shows a form titled "Account Information". Under the heading "Account Owner", the name "Ross Shelton" is displayed next to a profile icon. Below this, the "Account Name" field is highlighted with a red rectangular border. The field contains a cursor and the text "Please fill out this field." below it. A red arrow points from the top right towards the "Account Name" field.

2.2 How to Create a Contact (Preferred)

1. Click **+** (**Global Actions**) in the top right corner of the page:



2. Select **New Contact** from the drop-down menu:



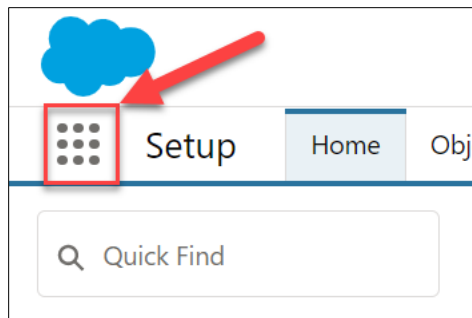
3. Fill out **Last Name** and other appropriate fields:



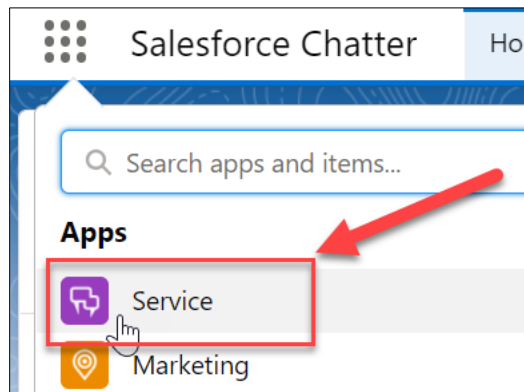
A screenshot of a Salesforce form field. The field is labeled '* Last Name' and contains the text 'Last Name'. A red box highlights the field, and a black box with the text 'Please fill out this field.' is overlaid on the bottom right of the field. Below the field, the text 'Account Name' is visible.

2.3 How to Create a Contact (Alternate)

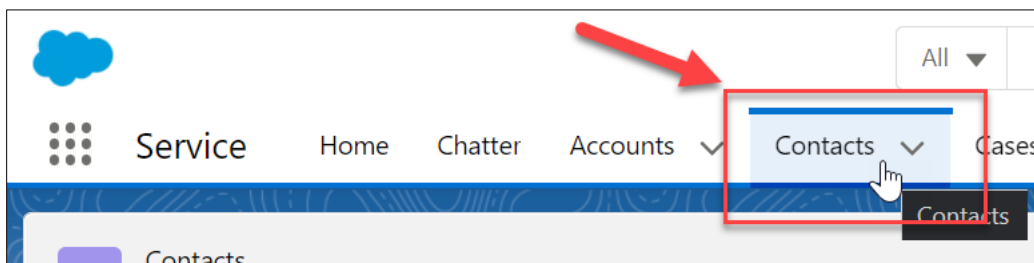
1. Click **App Launcher** in upper-left corner of page:



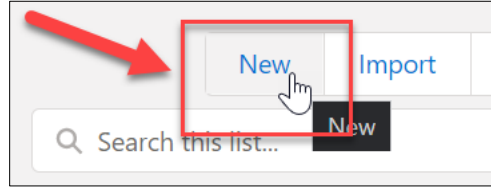
2. Select **Service**:



3. Select **Contacts** from the Service toolbar:



4. Select **New** in the upper-right corner of the Contacts page:



5. Fill out **Last Name** and other appropriate fields:

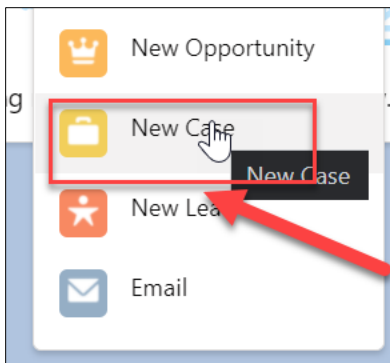
A screenshot of a form field for "Last Name". The field is highlighted with a red border. The text "Last Name" is entered in the field. Below the field, there is a tooltip that says "Please fill out this field." The field is labeled with a red asterisk and the text "* Last Name". Below the field, there is a label "Account Name".

2.4 How to Create a Case (Preferred)

1. Click **+** (**Global Actions**) in the top right corner of the page:



2. Select **New Case** from the drop-down menu:



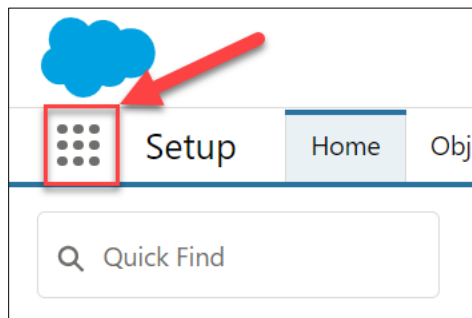
3. Select **Status** from drop down menu:

A screenshot of a form field for "Status". The field is highlighted with a red border. The text "New" is selected in the dropdown menu. The field is labeled with a red asterisk and the text "* Status".

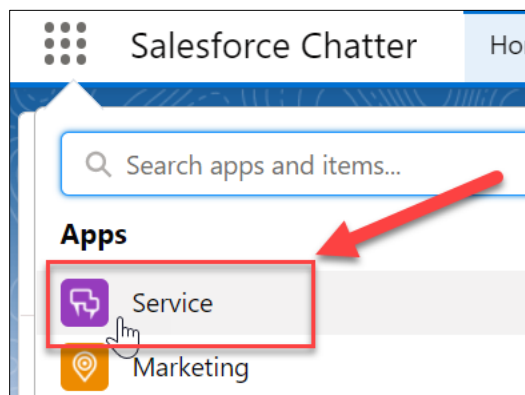
4. Fill out other appropriate fields.

2.5 How to Create a Case (Alternate)

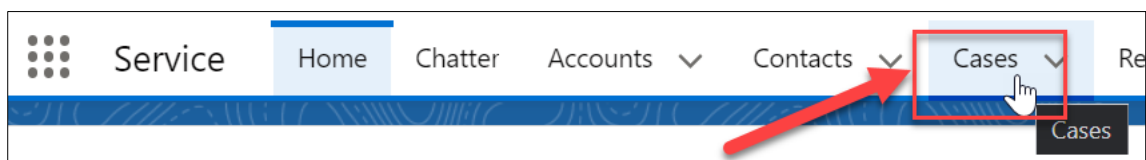
1. Click **App Launcher** in upper-left corner of page:



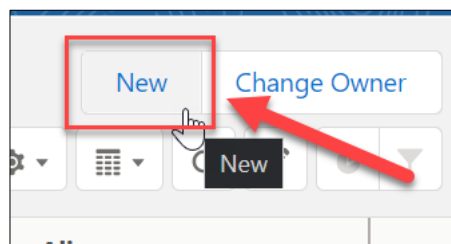
2. Select **Service**:



3. Select **Cases** from the Service toolbar:



4. Select **New** in the upper-right corner of the Cases page:



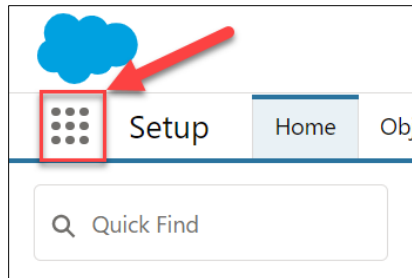
5. Fill out **Status** and **Case Origin**:

A screenshot of a Salesforce case form. The 'Status' field is set to 'New', the 'Priority' field is set to 'Medium', and the 'Case Origin' field is set to '--None--'. Red boxes highlight the 'Status' and 'Case Origin' fields. A cursor is visible in the 'Status' field.

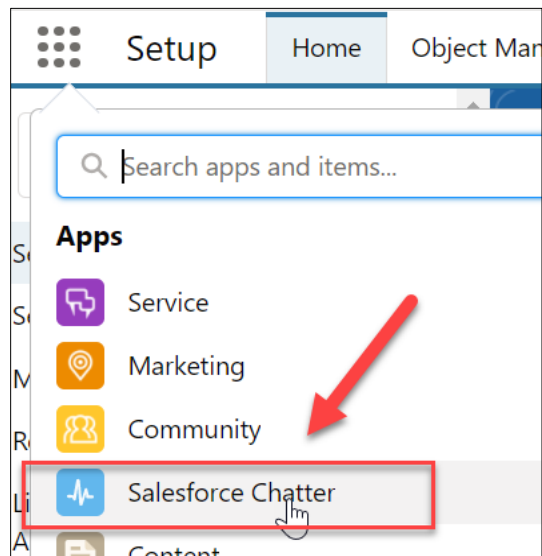
6. Fill out other appropriate fields

2.6 How to Create a Chatter Post

1. Click **App Launcher** in upper-left corner of page:



2. Select **Salesforce Chatter**:



3. Select **Chatter** from the Salesforce Chatter toolbar:



4. Type your post into the box provided. Select **Share**:

