

KBFD-004 How to login to Salesforce and Manage contacts, Monthly report submissions

This document has 3 sections.

Section 1 – Logging in to Salesforce.

Section 2 – Adding a contact under a chapter.

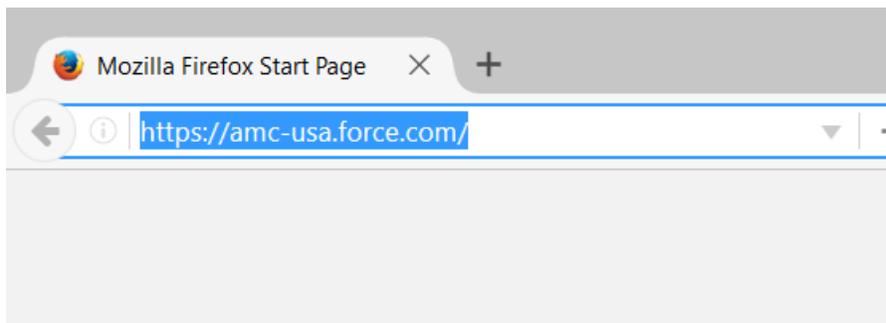
Section 3 – Submitting Monthly report for local chapter.

Section 1: Logging in to Sales Force.

For simplicity, you can now use your tabligh.XXX@ahmadiyya.us login ID from Google to login to sales force in one step. This means, your Ahamadiyya.us login credential is used to log you into Salesforce directly without having to have a separate password for Sales Force. This is called single-sign-on using Google App services. Please see the instructions and screen capture to see how it is done.

Please follow these steps :

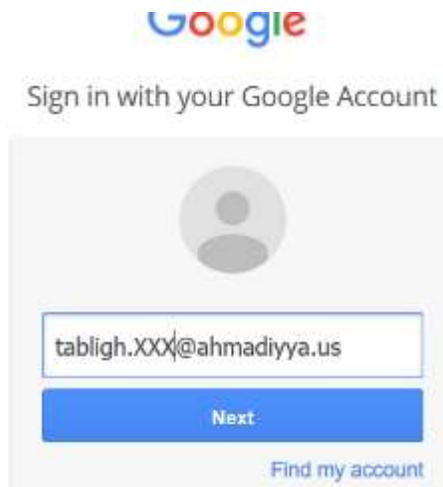
Open a Browser and type in the following URL in the address bar <https://amc-usa.force.com> and hit Enter key. The browser will auto redirect to Google email Id login prompt



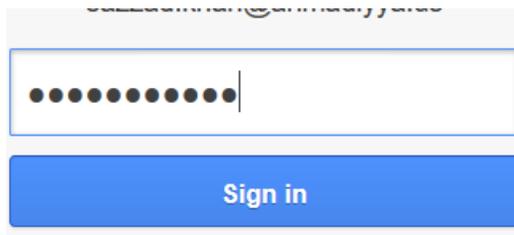
Redirected Google Email Login ID prompt



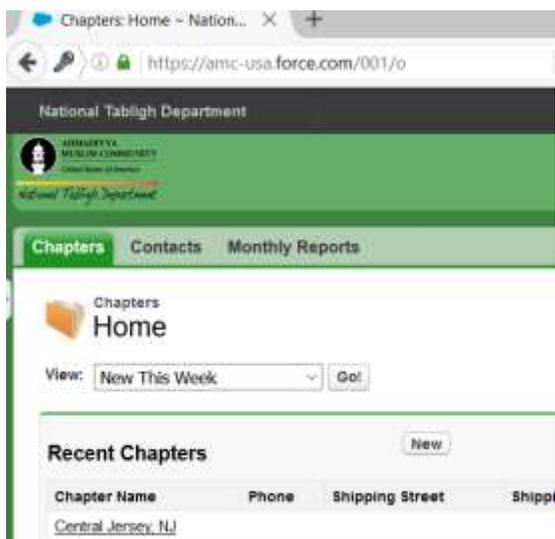
Type in your **tabligh.xxx@ahmadiyaa.us** login credential that was given to you earlier for Email access.



Enter your password for your ahmadiyya.us Email account



The system will log you in and direct you automatically back to the Salesforce home page as seen below.



Login to the Salesforce Tool is now completed. Notice you have only 3 menu options (Chapter, Contacts, Monthly Reports).

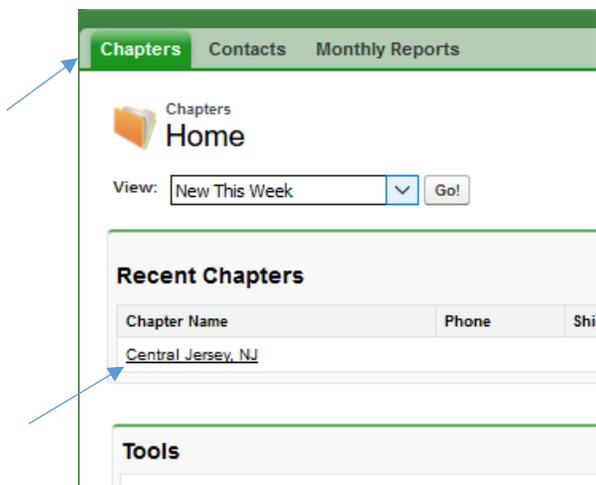
Section 2: Adding new contact from Coffee Cake and True Islam event

The contacts menu option allows the local secretary Tabligh to enter new contacts from various events into the system for tracking and relationship management.

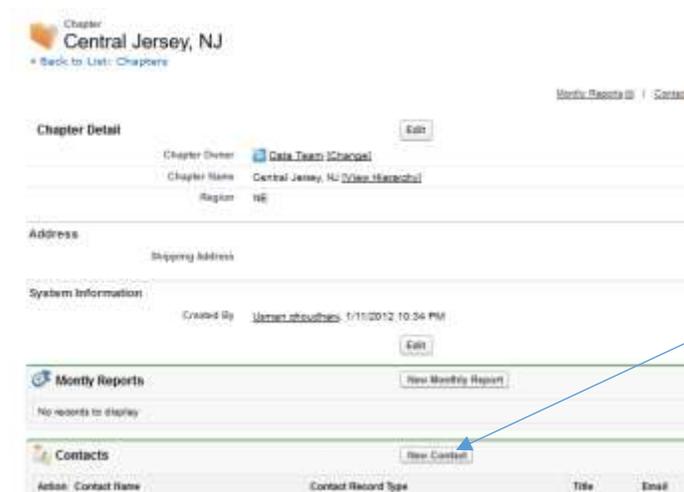
At this time, the only action needed from the secretary tabligh is to enter the requested data presented in the form. After each event, the secretary is asked to login to salesforce and enter or update the contact info and current state of engagement.

Please follow these steps to enter a new contact or guest particulars.

From the home screen, click on Chapters on Top and then click on your chapter name which listed down below.



The screen looks like as seen below. Click on the button “New Contact”



The following Form appears. Please fill in the requested details in the Form. Any form line entry with a red bar indicates it is a required data point. Note that Coffee Cake and Islam event is already auto-selected.

Contact Edit
New Contact

Contacts not associated with chapters are private and cannot be viewed by other users or included in reports.

Contact Edit Save Save & New Cancel

Chapter Name: Central Jersey, NJ

First Name: Mr. John

Last Name: Doe Junior

Phone: (212) 999-9999

Email: john.doe@email.com

Status: Introduced

Have you attended one of our events?
 Available: Arabic Class, Book Fair, Bookstall
 Chosen: Coffee Cake and Islam

Address Information

Primary Street:

Primary City:

Primary State/Province:

Primary Zip/Postal Code:

Primary Country:

Description

Description: Attended CCTI on 9/9/16. Requested a printed Quran. Needs follow up after two weeks.

Save Save & New Cancel

Click save to save the record. The following screen shows the update.

Contact
Mr. John Doe Junior

✓ Contact has been saved.

[Back to List: Contacts](#)

[HTML Email Status](#) | [Cases](#)

Contact Detail Edit Clone Send an Email

Chapter Name	Central Jersey, NJ	Phone	(212) 999-9999
Name	Mr. John Doe Junior	Email	john.doe@email.com
Have you attended one of our events?	Coffee Cake and Islam	Status	Introduced

The contact info has now been entered into the system. You can verify the data by clicking on the Contacts list link either from the Menu or from the 'Back to List: Contacts' link.

Contacts
Home

View: Go!

Recent Contacts New

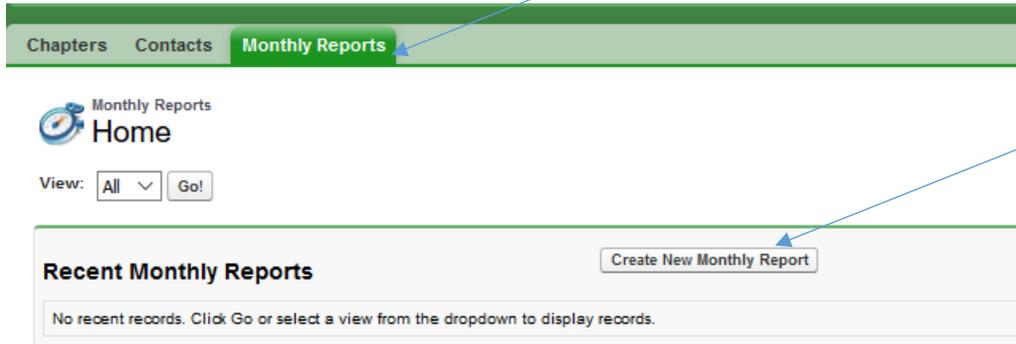
Name	Contact Record Type	Home Phone	Phone	Mobile Phone	Email	Primary Street
Doe Junior, John	Tabligh		(212) 999-9999		john.doe@email.com	
Goodwin, Thomas	Tabligh		(809) 937-4990	(809) 937-4990	tkg.oco@gmail.com	
Gydupling, Tenzin	Tabligh		(732) 299-4049	(732) 299-4049		

Section 3: How to submit Monthly Report by Local Secretary Tabligh

Local secretary is required to submit monthly activity report via Salesforce Tool. Reports are due on the first day of the month for prior month's activities.

Please follow the steps to submit the report.

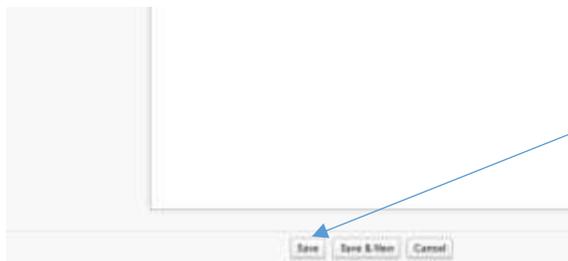
Click the Menu Item "Monthly Reports" and then click on "Create New Monthly Report"



A large form appears. Please provide as much detail as possible with number values for fields. Here is an example for the CCTI section and event.

A screenshot of a monthly report form. The form is divided into several sections. The first section has two input fields: 'Duration (in days)' and 'How many people received message?'. The second section, titled 'Coffee Cake and Islam Meetings', has three input fields: 'How many meetings?' with the value '3', 'Average Attendance?' with the value '1.5', and 'How many Bai'ats?' with the value '0'. The third section, titled 'Additional Information', has two text areas. The first is labeled 'New areas where Tabligh done' and contains the text: 'For the first time, we have arranged a permanent presence/spot in a large indoor busy shopping mall. We will have regular flier CCTI event in a store front within the mall. This area is frequented by 1000+ people daily on week nights.' The second is labeled 'Faith Inspiring Incidents' and contains the text: 'Two people came and shared their thoughts regarding how positive our efforts were, regarding True Islam.' Below the text areas is a rich text editor toolbar with buttons for undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, and outdent.

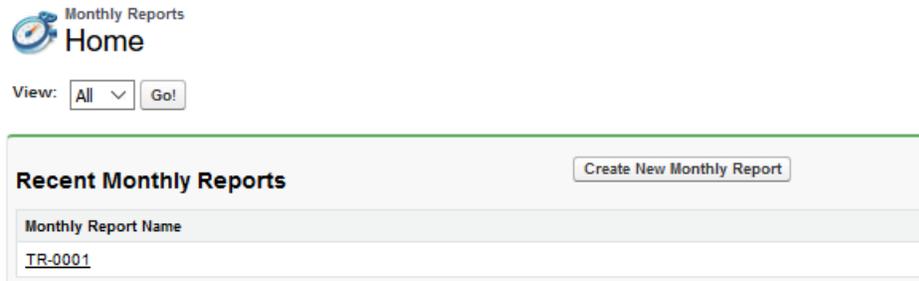
Once the details are typed in. Click the "Save" button at the bottom of the screen.



The following screen is displayed to show that the report was accepted. If you are not seeing this screen, that means the report was not submitted.



At this point, the report is submitted. You can click on the link "Back to List: Monthly Reports" to check. The link TR-0001 is the report link for that month. You can also do another report for a different month at this time if needed.



End of Document.