#### Presidents Refresher Course December 03,2016





#### Salesforce

- Login Process
- Contact Management
- Reporting

#### **Prerequisites**

Complete the Email Setup @ahmadiyya.us



Open the email and follow the link to login



- Enter password provided in the email and click sign-in to complete the process
- Send an email to tabligh.helpdesk@ahmadiyya.us

#### **Login Process**

Open the browser and connect to <a href="https://amc-usa/force.com">https://amc-usa/force.com</a>



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



## Home Page

← → C [	https://amo	-usa.force.com/001?f	cf=00BU000002d	ldWp&rolodexIndex=	=-1&page=1						☆	<b>*</b> G	-
Apps 🕨 S	Suggested Sites	C13 to C14 Power Co	🗋 Free Hotmail	🖺 Inside Dell Home	Personal Information	🔍 Search	📙 Imported From IE						
National Tal	bligh Department									<b>_</b>	LA West Tablig	h Sec	-
AHMADIYYA MUSLIM COMP United States of Am	MUNITY									Search		Sear	ch
National Tabligh Depa	etment												
Chapters	Contacts Mo	onthly Reports											
All	Organizations	¥											0
Ø								A   B   C   D   E	E   F   G   H   I   J   K   L   M	N   O   P   Q   R   S   T	U   V   W   X   Y	Z Other	
Chapter Na	ime 🕈		Phone		Shipping Street			Shipping City		Shipping State/Province			
LA West, C	<u>A</u>												_
T													
1-1 of 1 💌					<	🕯 🖣 Previous N	ext 🕨 🕅					Page 1	of 1
									A 17 19 19 19 19 19		The state of the s	And I all	a const



#### Salesforce

- Login Process
- <u>Contact Management</u>
- Reporting

## Home Page

$\leftarrow$ $\rightarrow$ C $\triangleq$ https://ar	mc-usa.force.com/001?fc	f=00BU000002dd	Wp&rolodexIndex=	=-1&page=1						☆	* G 🐥
Apps <b>b</b> Suggested Sites	C13 to C14 Power Cor	🗋 Free Hotmail	🖺 Inside Dell Home	Personal Information	🔍 Search 📒	Imported From IE					
National Tabligh Departme	ent									LA West Tablig	h Sec 🚽
AHMADIYYA MUSLIM COMMUNITY United States of America									Soorsh		Conroh
National Tabligh Department									Search		Search
Chapters Contacts	Monthly Reports										
All Organization	IS ¥										-
Ø							A   B   C   D   E	F   G   H   I   J   K   L   M	1   N   O   P   Q   R   S	T   U   V   W   X   Y	Z Other
Chapter Name 🔹		Phone		Shipping Street		SI	hipping City		Shipping State/Provi	nce	
LA West, CA											
•											
1-1 of 1 💌				4	🕯 🕯 Previous Ne	xt 🕨 🕪					Page 1 of 1
								11 - 20 - 20 - 20		The second second	

#### **Contacts Management**

C https://amc-usa.force.com	n/001U00000091pro				☆ 🇯 🖸
s 🕟 Suggested Sites 🎓 C13 to C14 P	ower Cor 🗋 Free Hotmail 📋 Inside Dell Home	🌙 Personal Information 🛛 🔍 Search	Imported From IE		
onal Tabligh Department					LA West Tabligh Sec
HMADIYYA USLIM COMMUNITY					
Instant Manuse of America				Search	Search
Tabligh Department					
pters Contacts Monthly Reports	i l				
Chapter					Printable V
🬒 LA West, CA					
Back to List: Chapters					
		Monthy Reports I01	Contacts (5+)		
		month reports is 1	<u>Contracto</u> IC		
Chapter Detail					
Chapter Owne	🕫 🔼 Data Team		Phone		
Chapter Nam	LA West, CA [View Hierarchy]		Fax		
Regio	n West		Website		
ddress					
Shipping Addres	s				
ystem Information					
Created B	y <u>Usman choudhary</u> , 1/11/2012 10:34 PM		Last Modified By	st admin, 9/10/2016 6:13 PM	
Montly Reports	New Monthly	Report			
No records to display	П				
	V				
Contacts	New Contact				
Action Contact Name	Contact Record Type	Title	Email		Phone
Action contact Name	<b>T</b> 15.1		jinevac@hotmail.com		
Edit Jineva Campbell	labligh				
Edit Jineva Campbell Edit Gina Mendoza	Tabligh		gina.mendoza.nineteen90@gmail.com		
Edit         Jineva Campbell           Edit         Gina Mendoza           Edit         LA West Tabligh Sec	Tabligh AMC		gina.mendoza.nineteen90@gmail.com tabligh.law@ahmadiyya.us		
Edit         Jineva Campbell           Edit         Gina Mendoza           Edit         LA West Tabligh Sec           Edit         Ameria Lipscomb	Tabligh Tabligh AMC Tabligh		gina.mendoza nineteen90@gmail.com tabligh.law@ahmadiyya.us		

#### **Add New Contacts**

→ C A https://amc-usa.force.com/00	03/e?retURL=%2F001U0000	00091pro&accid=001U00000091pro			☆ 🛪 🖪 🖊
pps 🕟 Suggested Sites 🎓 C13 to C14 Power	Cor 🗋 Free Hotmail 🗋 In	nside Dell Home 🌙 Personal Information	n 🔍 Search 🛛 📙 Imported From I		
Contact Edit New Contact ontacts not associated with chapters are priva	ite and cannot be viewed by	other users or included in reports.			
Contact Edit Chapter Name First Name Last Name Have you attended one of our events?	LA West, CA None None	Chosen Coffee Cake and Islam		Phone 🧭 Email 🎯 Status Interested V None Interested Engaged Participating Pre-Initiation Initiation	
Address Information				induon	= Required Information
Primary Street Primary City Primary State/Province Primary Zip/Postal Code Primary Country	X11119 FWF PO Box 1790 Folsom CA 95763				
Description					
Description					
Race Religious Affiliation Religious Sect	None  -None				
		Save Save & New Cancel			

## **Modify Contacts**

→ C https://amc-usa.force.com/001U00000091pro						
os 🕟 Suggested Sites 🎓 C13 to C14 Pow	wer Coi 🗋 Free Hotmail 📋 Inside Dell Home 🌙 Personal J	Information 🔍 Search 📙	Imported From IE			
pters Contacts Monthly Reports						
Chapter				Printable View		
📕 LA West, CA						
Back to List: Chapters						
		Month Reports [0]   C	ontacts [5+]			
		monty repetit in 1	<u>itaris</u> [3-1			
hapter Detail						
Chapter Owner	🔼 Data Team		Phone			
Chapter Name Region	LA West, CA [View Hierarchy]		Fax			
	West		Website			
dress						
Shipping Address						
retem Information						
Created By	Usman choudharv. 1/11/2012 10:34 PM		Last Modified By sf admin, 9/10	0/2016 6:13 PM		
Montly Reports	New Monthly Report					
o records to display						
Contacts	New Contact					
action Contact Name	Contact Record Type	Title	Email	Phone		
dit Jineva Campbell	Tabligh		jinevac@hotmail.com			
dit Gina Mendoza	Tabligh		gina.mendoza.nineteen90@gmail.com			
dit LA West Tabligh Sec	AMC		tabligh.law@ahmadiyya.us			
dit <u>Ameria Lipscomb</u>	Tabligh					
dit Jalal-ud-din Ahmad	AMC		mansoor_ishfaq@hotmail.com			
how 1 more »   Go to list (6) »						
		Always show me Vm				
Rack To Ton		Always show no + n.s.	a records per related list			
Васк То Тор						

## Modify Contacts ...

$\leftrightarrow$ $\rightarrow$ $C$ $\triangleq$ https://amc-	usa.force.com/0	030B00001w2HUK						☆	*	G	<b>₽</b> :	
📫 Apps 🕟 Suggested Sites 🍠	C13 to C14 Powe	er Cor 📄 Free Hotmail	🗋 Inside Dell Home	e 🤰 Personal Information 🖉	🔍 Search 🛛 📙 Impo	orted From IE						
Contact Datail		_		Notes & Attachments [0]   Open	n Activities [0]   HTML	_ Email Status [0]   Cases [0]					^	
	Chanter Name			Send an Email		Dhone						
	Name	LA West, CA				Email	; ⊘ I ② iinevac@hotmail.com				- 11	
Have you attended on	e of our events?	oniova campion				Status	Interested				1	
Address Information											- 17	i
	Primary Address	Long Beach									1	
Description												
	Description										- 11	l
	Race										- 87	l
Rel	Igious Affiliation										- 17	l
	Kenglous sect										- 17	
System Information	Created By	sf admin, 11/11/2016 2:37	PM			Last Modified By	callcenter team, 11/16/2016 9:02 AM					
			Edit Clo	Send an Email							1	
Notes & Attachments			New Note	Attach File								
No records to display												
Open Activities			New Task	New Event New Meeting Requ	uest							
No records to display												
HTML Email Status			Send an Em	ail								
No records to display												
Cases			New Case									
No records to display											].	

#### Modify Contacts ...

nns 🖪 Suggested Sites 🥌 C13 to C14 Powe						
ipps 🔽 suggested sites 🌽 ers to erriout	er Cor 🗋 Free Hotmail 📋 Inside Dell Home	Personal Information 💿 🔍 Search	📙 Imported From IE			
lational Tabligh Department					👤 LA West Tablig	h Sec 🚽
AHMADIYYA MUSLIM COMMUNITY Ubias ad America nai Tabligh Department					Search	Search
hapters Contacts Monthly Reports						
Contact Edit Jineva Campbell Contacts not associated with chapters are priv	vate and cannot be viewed by other users or incl	uded in reports.				
Contact Edit	Save Save 8	New Cancel				
Chapter Name First Name Last Name Have you attended one of our events?	LA West, CA -None V Jineva Campbell Available Coffee Cake and Islam Arabic Class Book Fair	sen 🔹	F	hone 🥝 Email 🧿 jinevac@hotmail.com tatus Interested 🔻		
Address Information					= Require	ed Information
Primary Street Primary City Primary State/Province Primary Zip/Postal Code Primary Country	Long Beach					
Description						
Description						



#### Salesforce

- Login Process
- Contact Management
- <u>Reporting</u>

## **Creating Monthly Report**

← → C	☆ 🏞 🖸	÷ :
🛗 Apps 🐌 Suggested Sites 🎓 C13 to C14 Power Cor 🗅 Free Hotmail 🗋 Inside	e Dell Home 🤳 Personal Information 🔍 Search 📒 Imported From IE	
National Tabligh Department	LA West Tabligh Sec	° <del></del>
AHMADIYYA Mula MacConstituti Dini di anna Nidioni Tabigh Japatonant	Search Search	earch
Chapters Contacts Monthly Reports		
Wonthly Reports Home		
Recent Monthly Reports	Create New Monthly Report	/ed ▼
No recent records. Click Go or select a view from the dropdown to display records.		

Copyright © 2000-2016 salesforce.com, inc. All rights reserved. Privacy Statement Security Statement

## Continued ...

→ C https://amc-usa.force.com/a2O/e?retURL=%2Fa2O%2Fo			*
Apps 🖒 Suggested Sites 🎓 C13 to C14 Power	Coi 🕒 Free Hotmail 🕒 Inside Dell Home 🥥 Personal Information 🛛 🔍 Search 🧧 Imported From IE		
Chapters Contacts Monthly Reports			
New Monthly Report Edit			
Monthly Report Edit	Save Save & New Cancel		
Information		= Required Information	1
Chapter Month Year	None ▼ 2016 ▼		
Coffee Cake and True Islam Meetings			
How many meetings? Total non-ahmadi guest attended? Number of contacts entered into system? How many Bai'ats?			
Additional Information about Coffee Cake	and True Islam and Other Events		
New areas where Tabligh done			
Faith Inspiring Incidents			

# Continued ...

https://amc-usa.force.com/a20	J/e?retUKL=%2Fa2O%2Fo	🕸 📅 🖸 🕇
s 🕟 Suggested Sites 🎓 C13 to C14 Power	Cor  🗅 Free Hotmail  🗅 Inside Dell Home 🌙 Personal Information 🖉 🧟 Search 📃 Imported From IE	
ookstaals		
How many people visited?		
How many books sold?		
Where held?		
/ers Distribution		
Where?		
When?	[ 11/20/2016 ]	
How Many?		
Appearances		
How many appearances?		
Dration (in minutes)		
How many people received message?		
dio Appearances		
How many appearances?		
Duration (in minutes)		
How many people received message?		
wspapers Appearances		
Duration (in days)		
How many people received message?		

## **Modify Reports**

$\leftarrow$ $\rightarrow$ C $$ https://ahmadiyya	a-usa.my.salesforce.com/a20/o		🏞 🕁 🗯 🖪 😽 🚦						
👖 Apps 🛛 b Suggested Sites 🎓 C13	to C14 Power Cor 📋 Free Hotmail 📋 Inside Dell Home 🥥 Personal Information 🔍 Search 📒	Imported From IE							
AHMADIYYA MOVEMENT I Interna	AHMADIYYA MOVEMENT I Internal								
AHMADIYYA MUSLIM COMMUNITY United States of America	AEMADIYYA MUSLIM COMMUNITY United States of America Search Search Search								
Home Console Leads Cha	Home Console Leads Chapters Contacts Engagements Cases Monthly Reports Reports Dashboards 🔸								
Shortcut A Unresolved Items Monthly Reports Help for this Page 📀									
Recent Items	View: All V Go! Clone   Create New View								
7 TR-0025 (11-09-2016) 6 Coffee Cake & Islam	Recent Monthly Reports		Recently Viewed 🔻						
🏺 <u>Milwaukee, WI</u>	Monthly Report Name	Chapter	Month						
Silicon Valley, CA	TR-0025 (11-09-2016)	Cleveland, OH	October						
Cleveland, OH	<u>IR-0024 (11-09-2016)</u> TR-0022 (11-09-2016)	Cleveland, OH	October						
TR-0024 (11-09-2016)	TR-0011 (10-03-2016)	Milwaukee WI	September						
Ø TR-0023 (11-09-2016)	TR-0010 (10-02-2016)	Zion. IL	September						
Seattle, WA	TR-0009 (09-25-2016)	Fitchburgh, MA	September						
Central Jersey, NJ									

🛐 Recycle Bin

Copyright © 2000-2016 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance

#### **Modify Reports ...**



## Modify Reports ...

$\leftarrow$ $\rightarrow$ C $\triangleq$ https://ahmadiyya	-usa.my.salesforce.com/a200B0000001c	zB/e?retURL=%2Fa2O0B0000001czB&_CONFIRMATIONTOKEN=VmpFPSxNakF4TmkweE1TMHINMVF3TmpveE1qb3hOaTQ0TWpGYSxVTDNO( 🏂 🛧 🦉 🐥	:
Apps <b>b</b> Suggested Sites <b>&gt;</b> C13	to C14 Power Cor 🗋 Free Hotmail 🖺 Insid	le Dell Home 🚽 Personal Information 🔍 Search 🧧 Imported From IE	
Home Console Leads Cha	apters Contacts Engagements Ca	ses Monthly Reports Dashboards +	^
Shortcut	Omthily Report Edit TR-0025 (11-09-2016	Help for this Page 📀	
Recent Items	Monthly Report Edit	Save Save & New Cancel	
Ø <u>TR-0025 (11-09-2016)</u>	Information	= Required Information	
<ul> <li><u>Coffee Cake &amp; Islam</u></li> <li><u>Milwaukee, WI</u></li> <li><u>Silicon Valley, CA</u></li> <li><u>Eitchburgh, MA</u></li> </ul>	Chapter Month Year	Cleveland, OH October • 2016 •	
Cleveland, OH TR-0024 (11-09-2016)	Coffee Cake and True Islam Meeting	3	
Ø <u>TR-0023 (11-09-2016)</u>	How many meetings?	5	
VA Seattle, WA	Total non-ahmadi guest attended?	1	
Central Jersey, NJ	Number of contacts entered into system?	0	
	How many Bai'ats?	0	
🔞 Recycle Bin	Additional Information about Coffee	Cake and True Islam and Other Events	
	New areas where Tabligh done		
	Faith Inspiring Incidents		

#### Resources

- Technical support: <u>tabligh.helpdesk@ahmadiyya.us</u>
- Email support: <a href="mail.support@ahmadiyya.us">email.support@ahmadiyya.us</a>
- Escalation Contact
  - Name: Syed Uzair Ahmed
  - Phone 425.214.3849
- Email configuration guide
- Tabligh Reporting System guide

# Jazak'Allah!