

## 1 | LOG IN

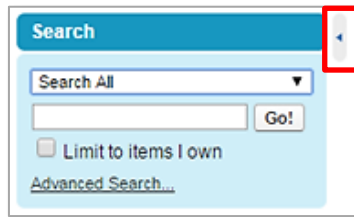
1. Go to [company.sf.com](http://company.sf.com).

NOTE: If you are on the network (or VPN), you will be logged in automatically. If you are off the network, you will receive a login prompt to enter your credentials.



2. Enter your username and password.
3. Click 'Log In'.

## 2 | SEARCH FOR AN EXISTING RECORD



1. If necessary, click the **Triangle button** to display the Sidebar.
2. In the Search section, **type your search criteria**.
3. Click 'Go!'

NOTE: The Advanced Search looks for more record types and fields than a search using the Sidebar. The Advanced Search includes searching attachments, custom fields and log text fields such as Description, Notes and Activity Comments.

NOTE: Before creating a NEW contact or account, search to see if a record already exists to avoid creating duplicates.

## 3 | SEARCH WITH WILDCARDS

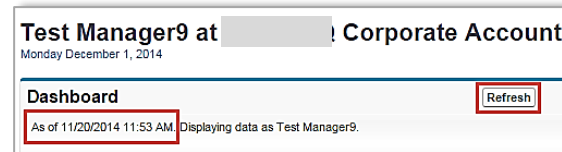
Use wildcards to locate specific records using the Search in the Sidebar or Lookup functionality.

**\* (Asterisk)** - Asterisks match zero or more characters at the middle or end (not the beginning) of your search term. You can use an \* at the beginning of a search term in a standard lookup search. (Example – Brim\* returns all occurrences of words that start with "Brim", "Brimwood", "Brimmel").

**? (Question mark)** - A question mark matches only one character in the middle or end (not the beginning) of your search term. You can't use a ? in a lookup search. (Example – Sm?th will return "Smith", "Smyth").

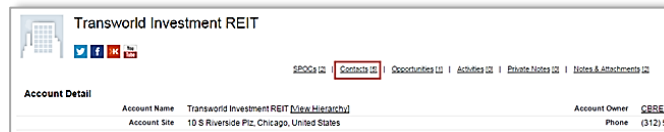
## 4 | REFRESH THE DASHBOARD

To see the most up-to-date dashboard on your Home page, click Refresh. The date above the dashboard tables indicates the date and time the data was last updated.



## 5 | ADD A NEW CONTACT

1. **Locate and open the desired Account record.** If the Account record does not exist, create the Account record first.
2. **Click the 'Contacts' related list hover link.**



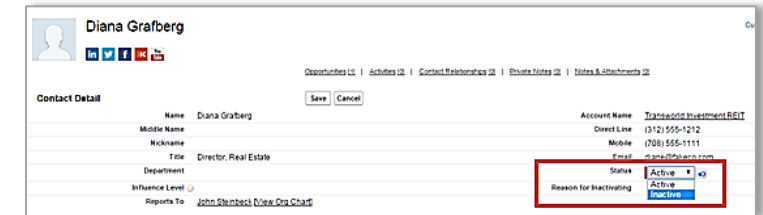
3. **Click 'New Contact'.**
4. **Complete the new Contact record.** The Last Name, Account Name (that auto-populates when creating a contact from the account), and Status fields are required.
5. **Click 'Save'.**

## 6 | ADD A CONTACT RELATIONSHIP

1. **Locate and open the desired Contact record.**
2. **Click the 'Contact Relationships' related list hover link.**
3. **Click 'New Contact Relationship'.**
4. **Click the 'Magnifying Glass' next to the Contact field.**
5. **Search and select the correct employee** in the Lookup window.
6. **Select the correct type in the Relationship Type field.**
7. **Complete any additional fields**, if desired.
8. **Click 'Save'.**

## 7 | UPDATE A CONTACT IF THE CONTACT MOVED OR RETIRED

1. **Locate and open the desired Contact record.**
2. **Click 'Edit' or use the inline editing function.**
3. **Change the Status field to 'Inactive'.**



4. **Enter a brief explanation** in the Reason for Inactivating field.
5. **Click 'Save'.**

NOTE: For contacts that move to a different company, do not change the Account name on the Contact record or change the Contact name to the new person in that position. Changing the old information instead of creating new records may associate notes, calendar events, and other records with the wrong person. If you know the contact has moved to Company B, inactivate their Contact record and add an activity to the inactive record noting the change. Then, navigate to the Company B Account record and re-create this person as a 'new' contact.

## 8 | CREATE A NEW ACTIVITY FROM AN ACCOUNT OR CONTACT

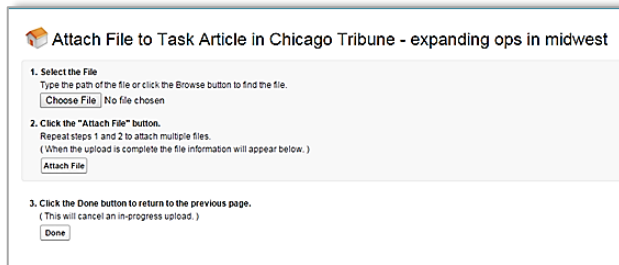
1. **Locate and open the desired Account or Contact record.**
2. **Click the 'Activities' related list hover link.**
3. **Click 'New Activity'.**
4. **Select 'Public – Client Intelligence (CM)' or 'Public – Client Meeting (CM)'** in the Activity Type field.
5. **Complete the remainder of the New Activity record.** The Subject, Activity Type, Assigned To, Status and Account fields are required.
6. **Click 'Save'.**

## 9 | CREATE A NEW ACTIVITY OR TASK FROM AN OPPORTUNITY

1. Locate and open the desired Opportunity record.
2. Click the 'Open Activities' related list hover link.
3. Click 'New Task'.
4. Select 'Public – Client Intelligence (CM)' or 'Public – Client Meeting (CM)' in the Activity Type field.
5. Complete the remainder of the New Task record. The Subject, Activity Type, Assigned To, Status and Related To fields are required.
6. Click 'Save'.

## 10 | ADD AN ATTACHMENT TO AN ACTIVITY

1. Locate and open the desired activity associated with an Account, Contact or Opportunity record.  
**OR**
2. Create and save a new activity from an Account, Contact or Opportunity record.
3. Click 'Add Attachment'.
4. Use the wizard to attach the file.



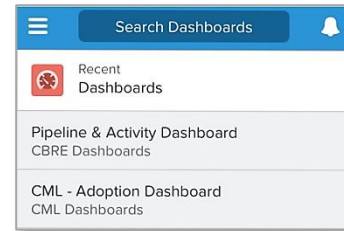
## 11 | ACCESS THE NAVIGATION MENU IN SALESFORCE1 (THE MOBILE APP)

To access the Navigation Menu, click the three bars. (Note: On an Android device, access this menu from any record. On an iOS device, if you are on a record, click the Back Arrow and then find the Navigation Menu.)



## 12 | VIEW A DASHBOARD IN SALESFORCE1

1. From the Navigation Menu, **scroll down to Dashboards**. Dashboards you previously viewed in the full website version display.
2. Tap the **Dashboard icon** or type a **keyword into the Search Dashboards field** to locate other dashboards that you have permission to view.



## 13 | LOG INFORMATION WITHOUT CALLING

You can easily log a note without making a call

1. Locate the desired Account or Contact record.
2. Click the Phone icon at the bottom of the record.



3. Click the 'Log Without Calling' confirmation message.
4. Add your notes to Log a Call page.
5. Click 'Submit'.

## 14 | USE YOUR PHONE'S MICROPHONE TO RECORD NOTES OR COMMENTS

When you are typing into a text field, utilize the microphone feature to enter information by recording your comments.

*Note: Using this feature automatically logs the notes as a private activity. Either you or a team member needs to open that activity from the web browser and set it to 'Public-Client Intelligence (CM)' or 'Public-Client Meeting (CM)' for it to display for other Capital Markets users.*

## 15 | LOCATE ACTIVE OPPORTUNITIES USING SALESFORCE1

Access the Opportunity related list to access any opportunities that are visible to you. Also access the custom "Link to Opportunity Information" accessible from the full web version to determine if there are any active or recently closed,

won or lost opportunities that you don't have permission to see.

## 16 | ADD AN ACTIVITY TO AN EXISTING RECORD

1. Click the 'Three Bars' button to open the Navigation menu.



2. Click the 'Accounts', 'Contacts', or 'Opportunities' icon.
3. Click or search for the desired record.
4. Click the 'Task' or 'Event' icon at the bottom of the page.
5. Complete the Task or Event page.
6. Click 'Submit'.

## 17 | GET HELP

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| <p><b>Capital Markets Salesforce Support</b><br/> <a href="mailto:SalesforceCML@xxx.com">SalesforceCML@xxx.com</a><br/> <i>(A CML team member will reach out to you to address your question or request)</i></p> <ul style="list-style-type: none"> <li>• Add new users</li> <li>• 'How to' Salesforce questions</li> <li>• Report request, such as creating report(s)</li> <li>• Business process inquiries</li> <li>• Training related questions</li> </ul> | <p><b>Global Help Desk</b><br/> <a href="mailto:GlobalITServiceDesk@xxx.com">GlobalITServiceDesk@xxx.com</a></p> <ul style="list-style-type: none"> <li>• Update or merge duplicate Account or Contact information</li> <li>• Technical support with Salesforce</li> </ul> |
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