Salesforce

Salesforce, Salesforce CPQ, Salesforce Billing

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CPQ & Billing

This chapter details general CPQ & Billing processes, eFC nuances, trainings, reported bugs, etc.

Product

This chapter details processes specific to the Product department. There may be some crossover between other departments, too.

Product

Migration Process Training

Please review the 13 minute training video in Gong here:

https://app.gong.io/call?id=8983735014238067423

This training video is specific to how Migrations is designed in Phase 1. The process is likely going to change dramatically and there are plans to use the Migrations object in Salesforce for a number of situations.

The training video above details:
- How a Migration record is created through automation

- What the fields on the Migration record mean; how they are intended to be used

- How to appropriately move a Migration record through each status (New, Cancelled, Working, Scheduled, Completed)

- List Views of Migrations

The Owner on Migrations is automated at the moment through a custom object called "Round Robin". When a Migration record is created, records from the Round Robin are queried. Individuals a part of the "Migration - Internal" process are found and the person with the lowest count will be assigned to the newly-created Migration record.

Product

Migration Object Introduction

This training video reviews the Migrations object in Salesforce, its intended use, and where you can see Migration records.

Knowing this information is likely useful to most Salesforce users, particularly for:
- CAEs
- CSMs

- Support

Migration records can tell you the Status of a customer's data migration, the type of migration taking place, who is in charge of the migration, and more.

Training Video in Gong: https://app.gong.io/call?id=7070818315507194264

Product

Migration Report and Dashboard Creation Training

This training was held with Kelsee Beck and Brock Cutler when they requested an understanding of how to report on customers that had purchased a migration. Especially, customers migrating from EFCO to Rubex.

While this training is for this particular scenario, this is a very useful training to watch if you need to report on other aspects of the "Migrations" object. It also shows how to take the report and add it to an existing dashboard.

Link to Gong training: https://app.gong.io/call?id=1221528492914961290

Product

Migration Records - Created by Mistake or Critical Information Missing?

Since Migration records are auto-created based off of criteria from a Closed Won Opportunity and its related Order, sometimes, there can be inaccurate information that makes the system think a migration is happening.

However, usually, there is missing information (due to a poor data migration from Zuora), such as the "From Platform" being blank.

There are 3 clues to look at to know whether a migration record was created in error or whether critical information is missing and needs to be added:

1. Check all the Contracts on the Account
    1. Who created the Contract? Was it "Zuora Data Migration" user? If so, there is probably some missing information.
2. Check the Opportunity that triggered the Migration record creation
    1. Did the Sales Rep happen to add a Migration product to the Quote? If so, what is the "From Platform" there?
3. Check the Hub
    1. **Always verify in the Hub whether there is a potential legacy system on the Account**
4. [Optional] Verify with the Sales Rep on the related Opportunity

See this training video for detailed instructions. **Never mark a Migration record as "Cancelled" until you thoroughly investigate and know for certain that the record was created in error.**

Gong Link: https://app.gong.io/call?id=7554584971494793653

Product

Migration Records - How to Create Manually

The ability to manually create Migration records in Salesforce is limited to a few people. If you believe you should have the ability to manually create a migration record, please submit a ticket in #salesforce_support in Slack.

Migration records should have the following upon create:

- Name
  - [AccountName] - [FromPlatform] --> [ToPlatform]
- From Platform
- To Platform
- Opportunity
- Account
- Order (optional, but highly recommended if it exists)
- Contact (optional)

Please watch this training video as it thoroughly shows how to first, verify if a migration record is needed and second, how to properly create it.

https://app.gong.io/call?id=1592957490232916457

Sales

This chapter details processes specific to the Sales department (AEs, BDRs, etc.). There may be some crossover between other departments, too.

Finance

This chapter details processes specific to the Finance department (RevOps, Deal Desk, etc.). There may be some crossover between other departments, too.

Marketing

This chapter details processes specific to the Marketing department. There may be some crossover between other departments, too.

All - General Salesforce Materials

This chapter details general process that apply to all eFC Salesforce Users.

Round Robin - Custom object in Salesforce

We use a custom object called "Round Robin" in Salesforce that can be used across any team and any process.

Please watch this training to understand how it works. This training is catered to leaders who will be managing records.

If you are unable to see the "Round Robin" object in Salesforce, it is because you are missing permissions.

"Reason Lost" - Moving Opps to Closed Lost

When moving an Opportunity into the "Closed Lost" stage, a few fields may be required, including:

- Reason Lost
- Sub Reason
- Closed Lost Detail
  - *As of 12/18/2023, this field is now required to Close Lose any deal.

It is important that users understand the differences and definitions of these reasons. Please see the table below:

"Reason Lost"	**"Sub Reason"**	**"Closed Lost Detail"**	**Notes/Definitions**
Legacy End of Life	Internal Server Errors	(optional)	We received server errors
	Customer Corrupted Files	(optional)	The customer had corrupted files
	Firewall Issues	(optional)	The customer had firewall issues
	Misunderstanding	(optional)	The customer misunderstood what was happening with migration (*i.e. they thought we were going out of business instead of just sunsetting products*)
Buying Committee	Out of Business	(optional)	

	Acquired/Sold Business	(optional)	Our current customer is no longer associated with the business but there is an opportunity to prospect new management.
	Disconnected	(optional)	You were ghosted or were no longer able to get in touch
	Champion Left Company	(optional)	
	Procurement/Legal	(optional)	
Customer Requirements	Only Wants Storage	(optional)	
	Outside our Product Scope	(optional)	**Do not confuse this with a product limitation**. When the customer's requirements are outside our product scope, this means something they are wanting is not something our product does and likely will never do. (i.e. they are looking to purchase a used car and that is not what our company does)
	On-Prem Requirement	(optional)	
	Timeline Too Far Out	(optional)	
	Budget/Pricing	(optional)	
	Consolidation	(optional)	The customer is consolidating their tech stack.
Product - Limitations	Functionality Missing	*required	**Please elaborate on the product limitation; not to be confused with a bug/technical challenge NOR product scope.** This should be selected when there is something our product c*ould* do but doesn't today.

Product - Technical Challenges	Bug/Something Not Working	*required	
	Downtime/Not Stable	*required	
	Slow Product Experience	*required	
Service Issues	Customer Education	*required	
	Onboarding Expectations	*required	The customer did not finish onboarding or did not receive the onboarding experience they expected.
	Support	*required	
Adoption	Product Utilization	(optional)	The customer did not use the product enough.
	License Utilization	(optional)	The customer's end users did not use the product enough.
Auto-Terminated	Customer Cancelled	(optional)	**NEVER to be selected by users; this is selected by automation in Salesforce**
Duplicate Opportunity	Duplicate Created by Mistake	(optional)	When a duplicate opp was created by mistake (by a user or by the system)

How To Create an Account Record

If you try to manually create an Account, you will receive an error stating that Accounts cannot be manually created. This is intentional, as there is critical data we miss when an Account does not start out as a Lead.

If you need to create a new Account, it must start out as a Lead. Before are written instructions on what to do. If you'd prefer video instructions, click here.

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1. Create a new Lead by clicking "New"

Screen Shot 2023-03-22 at 3.29.18 PM.png
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2. Select "Default" Record Type; Next

3. Set required fields as well as any other fields you need to see on the Account or Contact later

- **Required Fields:**
  - **First Name**
  - **Last Name**
  - **Phone**
  - **Email**
  - **No. of Employees**
  - **Lead Source** ***(be intentional about this; you will usually select 'Self Generated')***
- **Other Fields you may want to populate:**
  - **Website**
  - **Address**
  - **Title**

4. Click the "Convert Fields" tab and review the "Fields Required for Convert" section; select "Converted" as the new Lead Status and click "Select Converted Status"

Image not found or type unknown **Screen Shot 2023-03-22 at 3.34.27 PM.png**

5. The Convert window will open. Select whether to choose an existing Account and/or Contact, and *select "Don't create an opportunity upon conversion"* unless you intend on creating a New Logo opportunity.

In the screenshot below, I am *not* choosing an existing Account nor Contact.

Image not found or type unknown **Screen Shot 2023-03-22 at 3.35.48 PM.png**

6. If you DO want to select an existing record, search for the one you want to merge it with.

For example, I am going to create a new Account, but I don't want to create a new Contact, so I will merge it with an existing one. An example of when you would do this would be for Partner situations. Joseph Merritt is a perfect example because that Account will have multiple children Accounts, but we only want one Contact *that is related to all the children Accounts*.

If it's a partner situation, be sure to select the appropriate Record Type, such as Partner Customer for the Joseph Merritt example.

Image not found or type unknown **Screen Shot 2023-03-22 at 3.38.16 PM.png**

Image not found or type unknown **Screen Shot 2023-03-22 at 3.40.42 PM.png**

7. Convert - all done! (continue reading for further explanations for choosing existing records)

Image not found or type unknown Screen Shot 2023-03-22 at 3.43.16 PM.png

8. Open the new Account

Note in the screenshot, I can see one related Contact.

Image not found or type unknown Screen Shot 2023-03-22 at 3.45.52 PM.png

9. Open the Related Contact

See how it has *three Related Accounts*? This is because we chose an existing Contact when converting the Lead, but chose to create a new Account. This is how you ensure there is only one Contract record, but allow it to be related to multiple Accounts.

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10. Update record data as needed

In the Joseph Merritt example, we will want to make sure this new Account is a *child Account* and note that it has a partner relationship.

We do that by populating two fields:

Parent Account

Partner

Both of these fields should be populated with the parent Account. In this example, it will be "Test - Fuji Maruji".

Screen Shot 2023-03-22 at 3.49.36 PM.png
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You can verify the parent/child relationship by clicking the dropdown and selecting "View Account Hierarchy"

Screen Shot 2023-03-22 at 3.51.49 PM.png
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Screen Shot 2023-03-22 at 3.52.42 PM.png
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Lead Imports

If you need to have the Salesforce Team import Leads for you from a list (i.e. a spreadsheet/csv), please see below for instructions, policies, etc.

We have provided a template for you as a related attachment on this document. See "Attachments" section.

What Is Required for a Lead Import?

Salesforce requires a few fields in order to create a Lead.

The *bare minimum* required fields include:

- **First Name**
- **Last Name**
  - A valid Last Name **is not** a "?" or a repeat of the first name (i.e. "John John"). Please - do not create poor data in our Salesforce instance by providing a fake Last Name value
- **Company**
  - The name of the business the Lead is associated with; should be the company's official name
- **Phone**
  - A valid phone number with an area code
- **Lead Source**
  - MUST be a valid Lead Source value, as this is a picklist field; MUST be spelled **exactly** as we have our values. You may find our Lead Source values here under the Account/Lead Source Picklist Values section. Inactive values are *not* valid.
  - If you are unsure what the Lead Source should be for your list, please speak with Marketing and/or Sales Enablement for assistance
- **Owner**
  - First and Last Name of the Salesforce User that should own each Lead
- **Record Type**
  - You can find Record Type values here

While these are the only fields required, **we strongly encourage to provide as much data as possible or as relevant to the type of Leads you are importing.**

What File Format Does My List Need To Be?

Accepted file formats include Microsoft Excel (.xlsx), Google Sheets, or .csv

What Can I Do To Get My List Uploaded FAST?

All requests to import Leads will be put in our ticket queue. Every effort by the Salesforce Team will be made to get your list into Salesforce as quickly as possible. **Lists with complete, accurate data will be prioritized as they are much faster for our team to import.** This means no 'fixes' or changes from the Salesforce Team are necessary.

Lists that lack the necessary data (i.e. required fields as mentioned above) or are poorly constructed (i.e. column names do not match Salesforce field names) cannot be prioritized as quickly as lists that have complete data, due to the extra time it takes our team to clean up your list. Poorly constructed list imports always lead to errors with importing.

Here is an example of a **poorly constructed list**.

	A	B	C	D	E
1	**Name**	**Company**	**Telephone**	**Lead Source**	**Owner**
2	John Doe	ABC Company	801-444-9990	?	Me
3	Jane Doe	ABC Company	801-444-9990	Self Generated	Me
4	Michael Scott	Dunder Mifflin	5463334040	Self Generated	John
5	Jim Halpert	Dunder Mifflin	(900)840-9494	Zoom Info	Me
6					

Can you spot what is wrong with this list?

- Column Names do not match Salesforce Field names *exactly*
  - "Name" is not a valid field for the Lead. It should be broken out into 2 column for "First Name" and "Last Name"
  - "Telephone" is not the name of the field in Salesforce - it should be "Phone"
- Picklist Values not valid
  - "?" and "Zoom Info" are not valid picklist values for the Lead Source field. "?" does not exist (and the user should figure out the Lead Source for each Lead they want imported) and "Zoom Info" is not how we spell the picklist value - it should be "Zoominfo"
    - REMINDER: you can find our Lead Source values here
- Inaccurate values; expecting others to find the data for you
  - "Me" is not an accurate Owner. By putting "me", you expect the Salesforce Team to edit your list to have your own First and Last Name. You also expect the Salesforce Admin to know who "me" is
  - "John" is only a partial name of a user

Here is an example of a **well constructed list.**

First Name	Last Name	Email	Company	Website	Phone	Lead Source	Owner	Record Type
John	Doe	johndoe@abc.com	ABC Company		801-444-9990	ABM	Mike Wazowski	Default
Jane	Doe	janedoe@abc.com	ABC Company		801-444-9990	Self Generated	Mike Wazowski	Partner
Michael	Scott	mscott@dundermiff.com	Dunder Mifflin	dundermiff.com	5463334040	Self Generated	John Smith	Partner
Jim	Halpert	jhalpert@dundermiff.com	Dunder Mifflin	dundermiff.com	(900)840-9494	Zoominfo	Mike Wazowski	Reseller Customer

Here is what is great about this list:

- Column Names match Salesforce Field names
- Picklist Values are valid (Lead Source)
- Cells are left blank for non-required fields where the user doesn't have a value
    - Website
- Real, complete values
    - Owner has both the First and Last Name of the Salesforce User as you would find them if you searched their user record
    - Values provided for Record Type are real
- Proper formatting
    - The different formatting in "Phone" is ok - Salesforce accepts multiple formats; though consistent formatting is encouraged to avoid errors where you may not be expecting a rigid format for a particular field
- Record Type specification
    - At Revver, we use Record Types for Leads. You can find valid Record Types here

State/Country Picklist & Code Values

We use picklist fields for all standard Address fields in Salesforce. This means that the State/Province and Country fields **must** be valid picklist values.

"Under the hood", Salesforce has ISO Code fields for the State/Province and Country fields as well. These fields are called "State Code" and "Country Code". For record imports/updates, the Code fields are *easier* to use than the actual picklist fields users see in the UI.

At Revver, **we require a State/Province AND Country pair** for the following countries:

- United States
- Canada

For all other countries, we do NOT require a State/Province value.

See the charts below for a full reference of the Country+Country Codes as well as the State/Province + State Codes (for US and Canada).

United States - State/Province Value Pairs	
State/Province	**State Code**
Alabama	AL
Alaska	AK
American Samoa	AS
Arizona	AZ
Arkansas	AR
Armed Forces Americas	AA
Armed Forces Europe	AE

Armed Forces Pacific	AP
California	CA
Colorado	CO
Connecticut	CT
Delaware	DE
District of Columbia	DC
Federated Micronesia	FM
Florida	FL
Georgia	GA
Guam	GU
Hawaii	HI
Idaho	ID
Illinois	IL
Indiana	IN
Iowa	IA
Kansas	KS
Kentucky	KY
Louisiana	LA
Maine	ME
Marshall Islands	MH
Maryland	MD
Massachusetts	MA
Michigan	MI

Minnesota	MN
Mississippi	MS
Missouri	MO
Montana	MT
Nebraska	NE
Nevada	NV
New Hampshire	NH
New Jersey	NJ
New Mexico	NM
New York	NY
North Carolina	NC
North Dakota	ND
Northern Mariana Islands	MP
Ohio	OH
Oklahoma	OK
Oregon	OR
Palau	PW
Pennsylvania	PA
Puerto Rico	PR
Rhode Island	RI
South Carolina	SC
South Dakota	SD
Tennessee	TN

Texas	TX
United States Minor Outlying Islands	UM
US Virgin Islands	VI
Utah	UT
Vermont	VT
Virginia	VA
Washington	WA
West Virginia	WV
Wisconsin	WI

Canada - State/Province Value Pairs	
State/Province	**State Code**
Alberta	AB
British Columbia	BC
Manitoba	MB
New Brunswick	NB
Newfoundland and Labrador	NL
Northwest Territories	NT
Nova Scotia	NS
Nunavut	NU
Ontario	ON
Prince Edward Island	PE
Quebec	QC
Saskatchewan	SK
Yukon Territories	YT

Country/Territory Names & Codes	
Country/Territory	**Country Code**
Afghanistan	AF
Aland Islands	AX
Albania	AL
Algeria	DZ
Andorra	AD
Angola	AO
Anguilla	AI
Antarctica	AQ
Antigua and Barbuda	AG
Argentina	AR
Armenia	AM
Aruba	AW
Australia	AU
Austria	AT
Azerbaijan	AZ
Bahamas	BS
Bahrain	BH
Bangladesh	BD
Barbados	BB
Belarus	BY
Belgium	BE

Belize	BZ
Benin	BJ
Bermuda	BM
Bhutan	BT
Bolivia, Plurinational State of	BO
Bonaire, Sint Eustatius and Saba	BQ
Bosnia and Herzegovina	BA
Botswana	BW
Bouvet Island	BV
Brazil	BR
British Indian Ocean Territory	IO
Brunei Darussalam	BN
Bulgaria	BG
Burkina Faso	BF
Burundi	BI
Cambodia	KH
Cameroon	CM
Canada	CA
Cape Verde	CV
Cayman Islands	KY
Central African Republic	CF
Chad	TD
Chile	CL

China	CN
Chinese Taipei	TW
Christmas Island	CX
Cocos (Keeling) Islands	CC
Colombia	CO
Comoros	KM
Congo	CG
Congo, the Democratic Republic of the	CD
Cook Islands	CK
Costa Rica	CR
Cote d'Ivoire	CI
Croatia	HR
Cuba	CU
Curaçao	CW
Cyprus	CY
Czech Republic	CZ
Denmark	DK
Djibouti	DJ
Dominica	DM
Dominican Republic	DO
Ecuador	EC
Egypt	EG
El Salvador	SV

Equatorial Guinea	GQ
Eritrea	ER
Estonia	EE
Ethiopia	ET
Falkland Islands (Malvinas)	FK
Faroe Islands	FO
Fiji	FJ
Finland	FI
France	FR
French Guiana	GF
French Polynesia	PF
French Southern Territories	TF
Gabon	GA
Gambia	GM
Georgia	GE
Germany	DE
Ghana	GH
Gibraltar	GI
Greece	GR
Greenland	GL
Grenada	GD
Guadeloupe	GP
Guatemala	GT

Guernsey	GG
Guinea	GN
Guinea-Bissau	GW
Guyana	GY
Haiti	HT
Heard Island and McDonald Islands	HM
Holy See (Vatican City State)	VA
Honduras	HN
Hungary	HU
Iceland	IS
India	IN
Indonesia	ID
Iran, Islamic Republic of	IR
Iraq	IQ
Ireland	IE
Isle of Man	IM
Israel	IL
Italy	IT
Jamaica	JM
Japan	JP
Jersey	JE
Jordan	JO
Kazakhstan	KZ

Kenya	KE
Kiribati	KI
Korea, Democratic People's Republic of	KP
Korea, Republic of	KR
Kuwait	KW
Kyrgyzstan	KG
Lao People's Democratic Republic	LA
Latvia	LV
Lebanon	LB
Lesotho	LS
Liberia	LR
Libyan Arab Jamahiriya	LY
Liechtenstein	LI
Lithuania	LT
Luxembourg	LU
Macao	MO
Macedonia, the former Yugoslav Republic of	MK
Madagascar	MG
Malawi	MW
Malaysia	MY
Maldives	MV
Mali	ML
Malta	MT

Martinique	MQ
Mauritania	MR
Mauritius	MU
Mayotte	YT
Mexico	MX
Moldova, Republic of	MD
Monaco	MC
Mongolia	MN
Montenegro	ME
Montserrat	MS
Morocco	MA
Mozambique	MZ
Myanmar	MM
Namibia	NA
Nauru	NR
Nepal	NP
Netherlands	NL
New Caledonia	NC
New Zealand	NZ
Nicaragua	NI
Niger	NE
Nigeria	NG
Niue	NU

Norfolk Island	NF
Norway	NO
Oman	OM
Pakistan	PK
Palestinian Territory, Occupied	PS
Panama	PA
Papua New Guinea	PG
Paraguay	PY
Peru	PE
Philippines	PH
Pitcairn	PN
Poland	PL
Portugal	PT
Qatar	QA
Republic of the Marshall Islands	MH
Reunion	RE
Romania	RO
Russian Federation	RU
Rwanda	RW
Saint Barthélemy	BL
Saint Helena, Ascension and Tristan da Cunha	SH
Saint Kitts and Nevis	KN
Saint Lucia	LC

Saint Martin (French part)	MF
Saint Pierre and Miquelon	PM
Saint Vincent and the Grenadines	VC
Samoa	WS
San Marino	SM
Sao Tome and Principe	ST
Saudi Arabia	SA
Senegal	SN
Serbia	RS
Seychelles	SC
Sierra Leone	SL
Singapore	SG
Sint Maarten (Dutch part)	SX
Slovakia	SK
Slovenia	SI
Solomon Islands	SB
Somalia	SO
South Africa	ZA
South Georgia and the South Sandwich Islands	GS
South Sudan	SS
Spain	ES
Sri Lanka	LK
Sudan	SD

Suriname	SR
Svalbard and Jan Mayen	SJ
Swaziland	SZ
Sweden	SE
Switzerland	CH
Syrian Arab Republic	SY
Tajikistan	TJ
Tanzania, United Republic of	TZ
Thailand	TH
Timor-Leste	TL
Togo	TG
Tokelau	TK
Tonga	TO
Trinidad and Tobago	TT
Tunisia	TN
Turkey	TR
Turkmenistan	TM
Turks and Caicos Islands	TC
Tuvalu	TV
Uganda	UG
Ukraine	UA
United Arab Emirates	AE
United Kingdom	GB

United States	US
Uruguay	UY
Uzbekistan	UZ
Vanuatu	VU
Venezuela, Bolivarian Republic of	VE
Viet Nam	VN
Virgin Islands, British	VG
Wallis and Futuna	WF
Western Sahara	EH
Yemen	YE
Zambia	ZM
Zimbabwe	ZW