Salesforce for 8x8 Partners

Instructor led Webinar

Michelle Kaltenberg, Instructor

Agenda

1. Introduction & Positioning
2. Partner portal Quotes and Orders
3. Additional orders

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1.Introduction and Positioning

The What and Why's?

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1. Introduction & Positioning

- Salesforce.com or SFDC
- All new orders should be done in SFDC not Agent Portal
- Replaces agent portal for ALL orders.
  - Retiring soon
  - Date TBA

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Salesforce is split into 3 key Areas

Lead	Track prospects apart from your contacts and opportunities with Salesforce leads. After you've qualified your leads, convert them to contacts and create accounts and opportunities for those accounts
Account	Use Salesforce accounts to store information about your customers or the entities you are working with.
Opportunity	Track and manage your potential deals with Salesforce opportunities

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Session Outcome

- By the end of this session you will be able to:
  - Build and manage your 8x8 funnel is SFDC
  - Create new customer quotes
  - Place orders from quotes
  - Create add on quotes/orders

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2. Salesforce Ordering

Here, let me show you…

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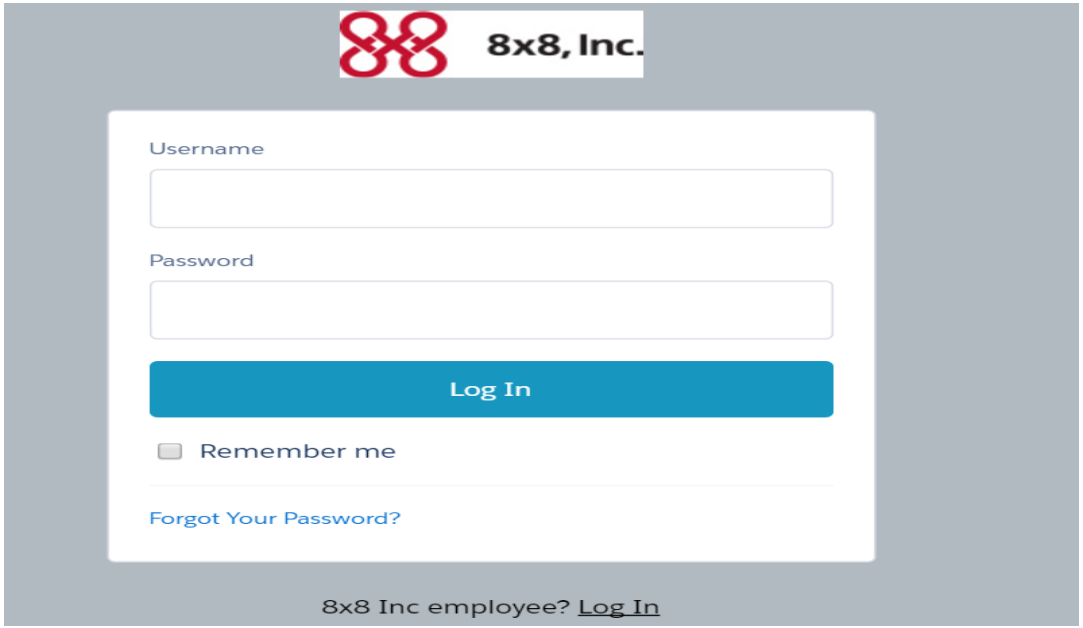
Login to Salesforce



Usernames and log in details will be sent out to you from your CAM to your email

Emails sent to you by the admin to your email that was created by your CAM

For password issues or log in issues send an email to sfdc@8x8.com

https://8x8.force.com/partners/login

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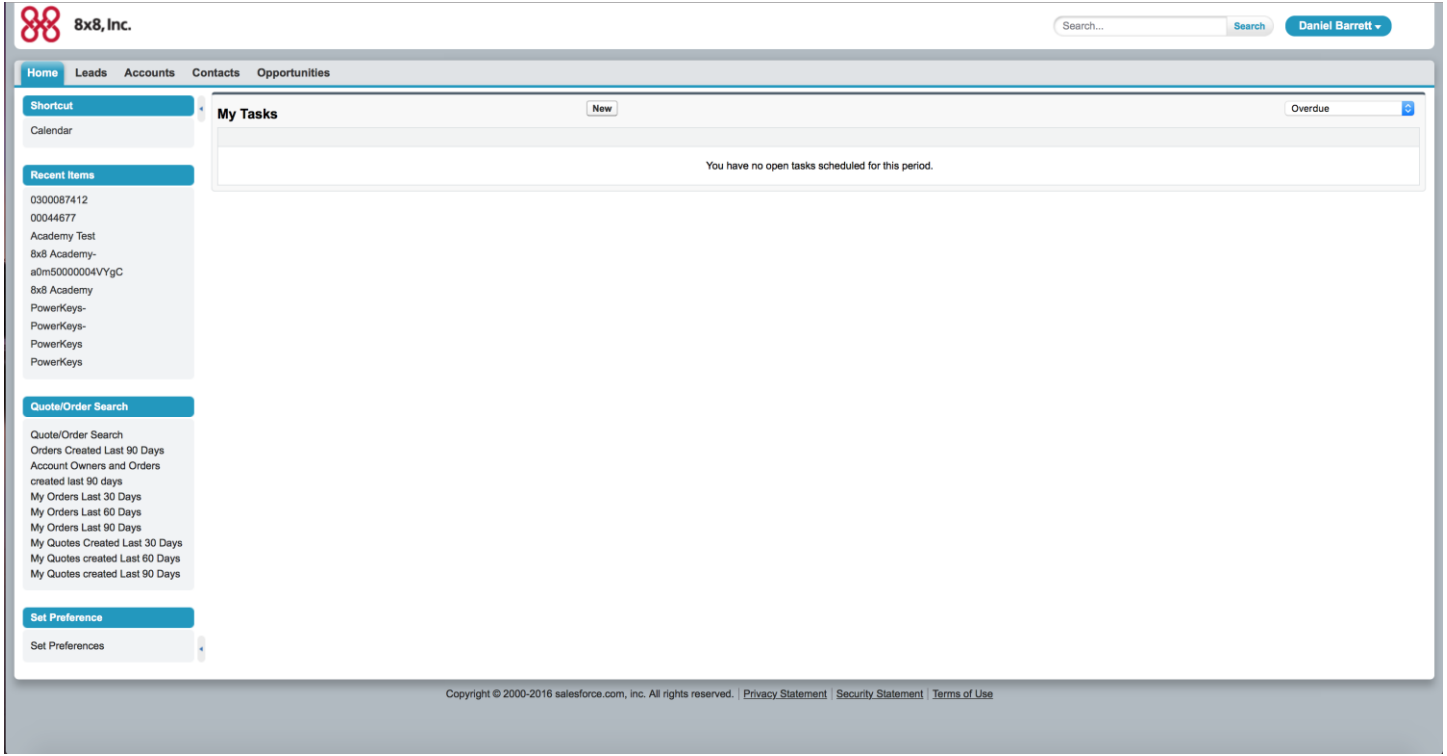
Home Page



Access:
leads
Accounts
Contacts and
Opportunities.

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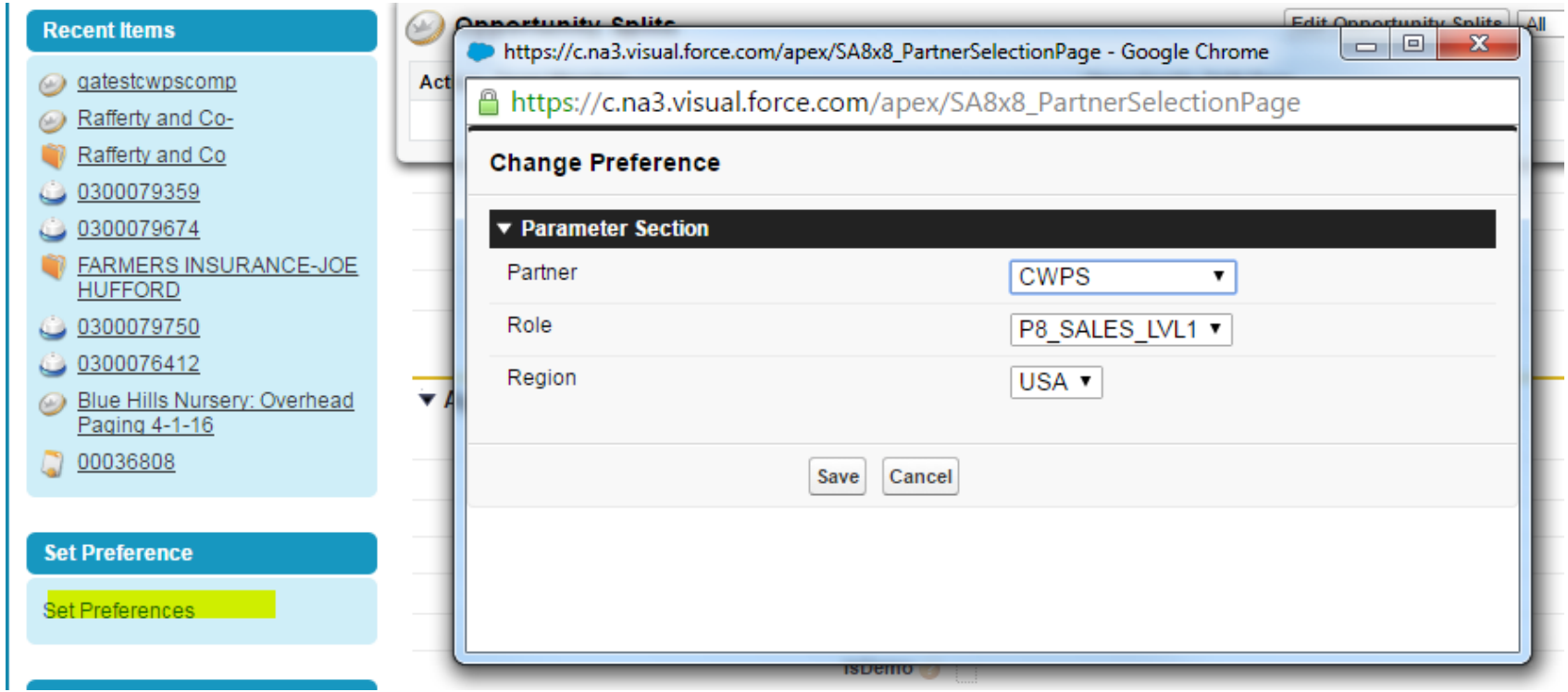
First step – Set Preferences



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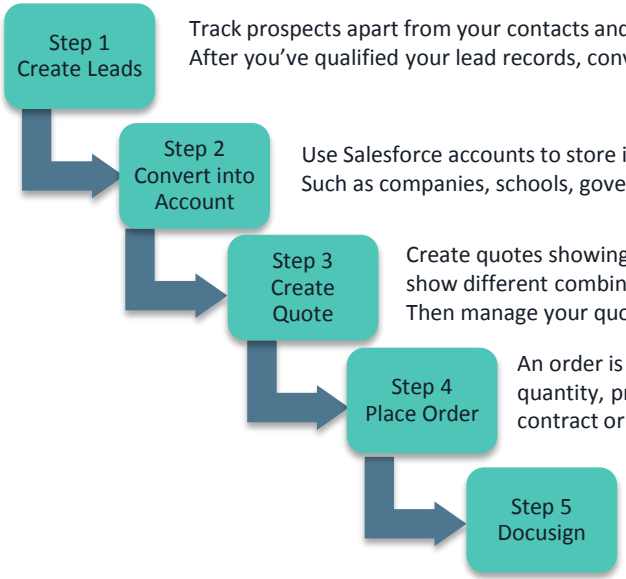
5 steps to placing orders for new customers



Track prospects apart from your contacts and opportunities with Salesforce lead records.
After you've qualified your lead records, convert them to contacts and create accounts for them

Use Salesforce accounts to store information about your customers or the entities you are working with,
Such as companies, schools, government agencies, or individuals.

Create quotes showing your customers the prices of the products and services that you offer. You can create a set of quotes to show different combinations of products, discounts, and quantities so customers can compare prices.
Then manage your quotes to keep them up-to-date.

An order is an agreement between a company and a customer to provision services or deliver products with a known quantity, price, and date. Depending on your company's needs, your administrator might require orders to be added to a contract or allow them to be added directly to an account.

Provides electronic signature technology and Digital Transaction Management services for facilitating electronic exchanges of contracts and signed documents

Source: https://help.salesforce.com/

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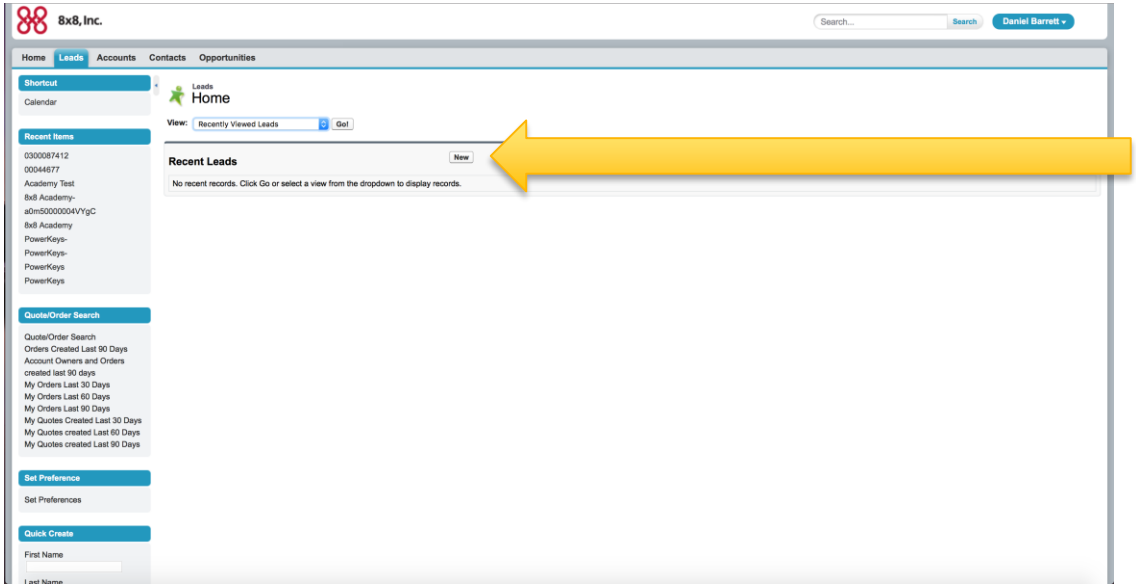
Create Lead

Click on the Leads tab at the top to get to the leads section.



Click on the “New” button to create a new lead. (all new orders start as a new lead)

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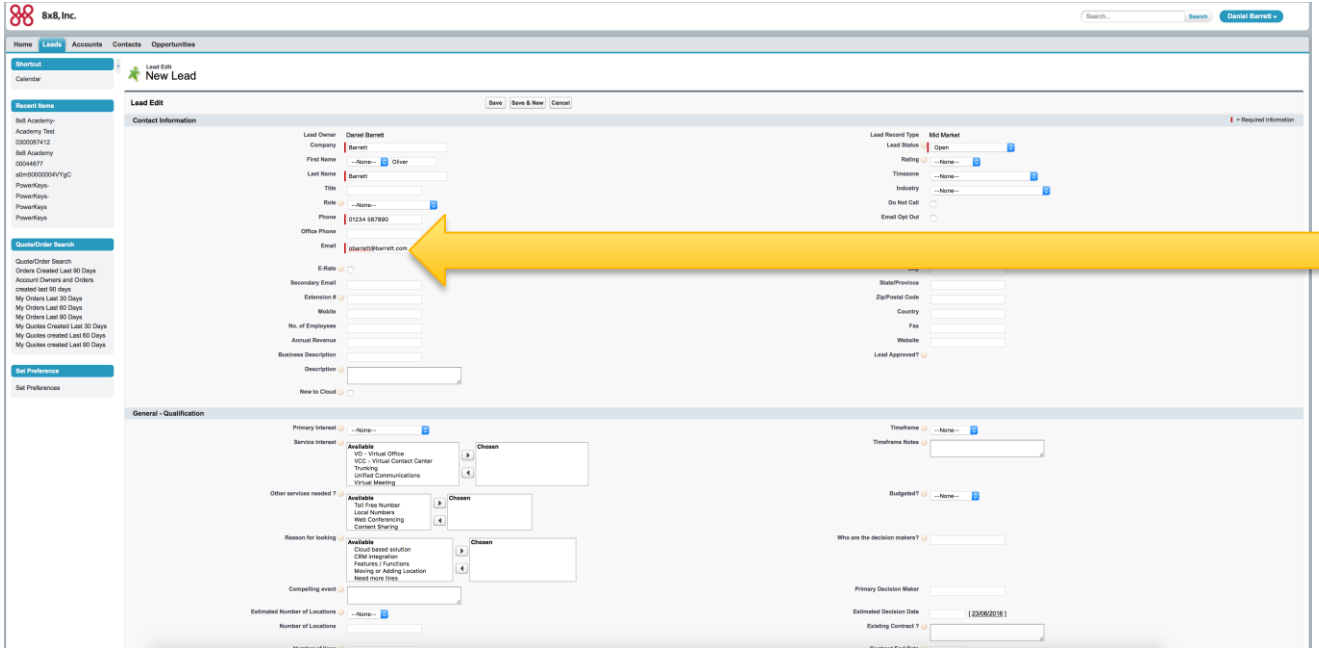
New Lead



Once at the new lead page, please note that only the fields with RED bars next to them need populating.

= Required Information

(Please take note of the other fields as these can be useful later on when building more advance features.)

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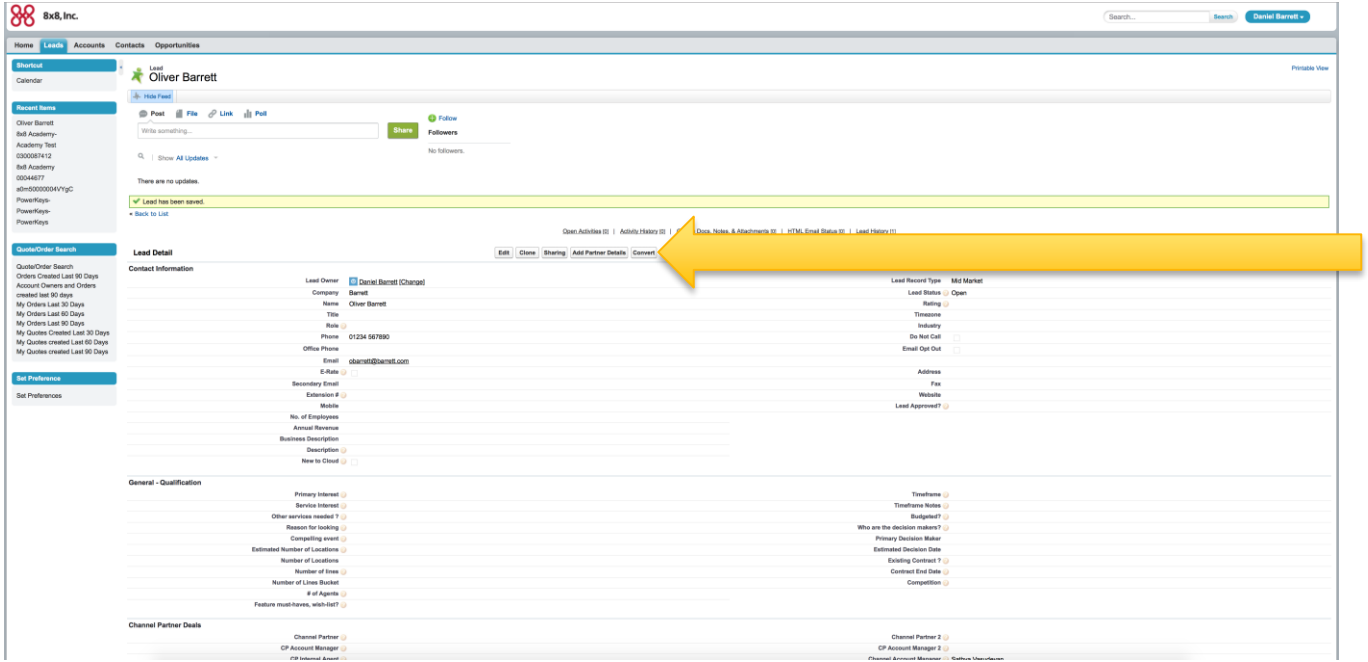
Saved Lead



Now the lead has saved click the convert button to progress to the next stage. Converting the lead.

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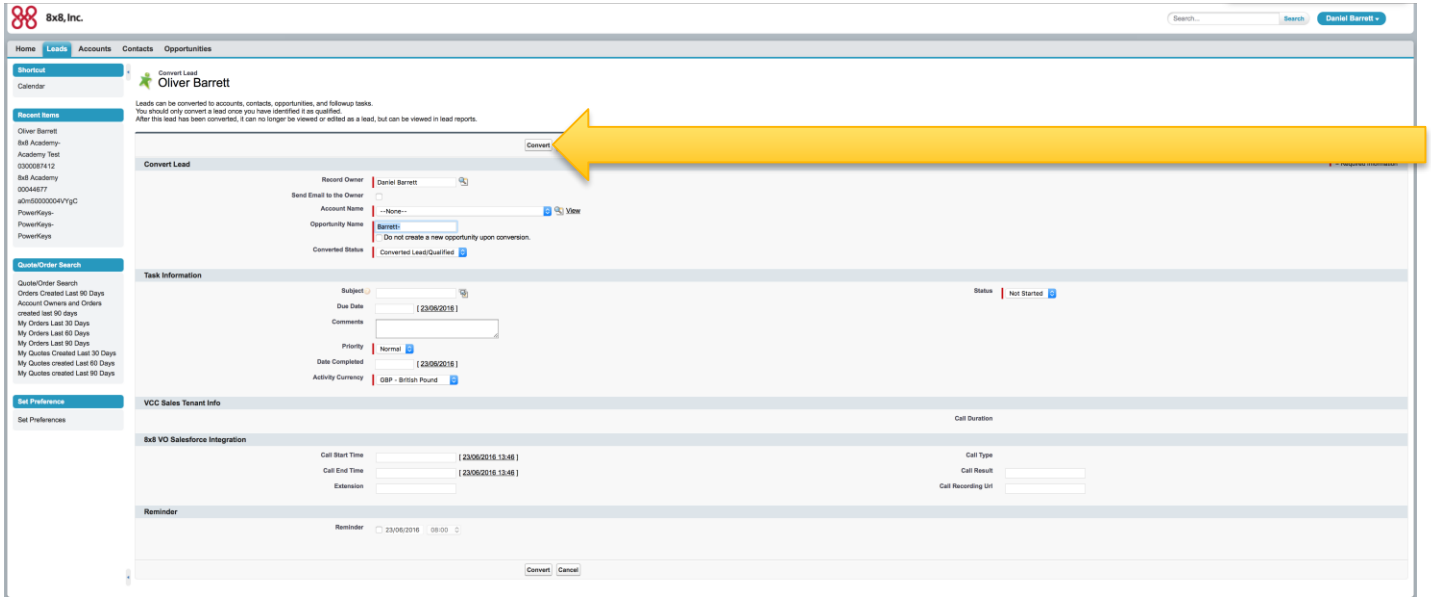
Convert Lead to Account



Now click convert.

System also creates an opportunity with lead conversion if box is checked

Note: System will search all fields for duplicates: email, phone, name, etc. Will not be allowed to convert if duplicate in another Salesforce record

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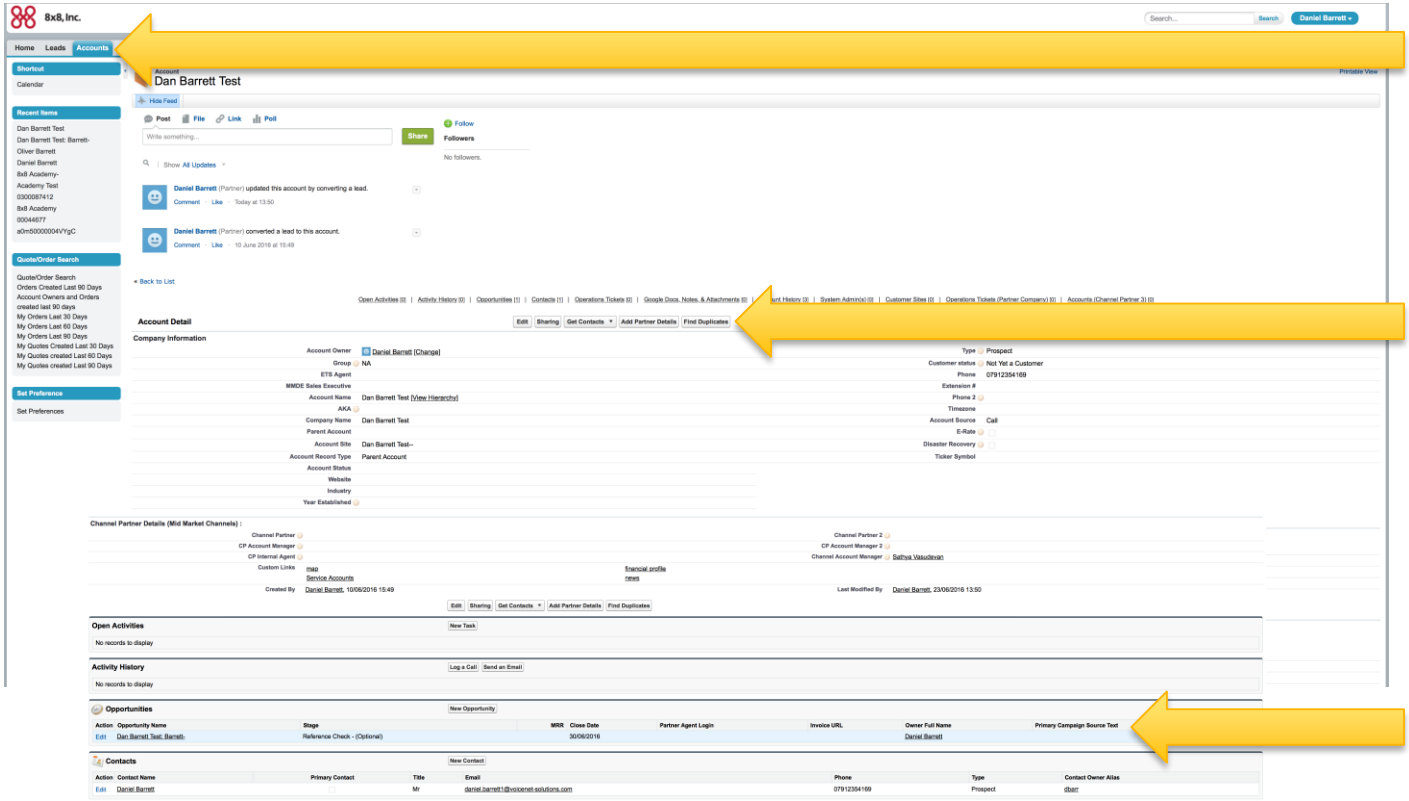
New Partner Account Created



Now the Account is created, from here you can update contact information and you can scroll down this page to create an opportunity under the account.

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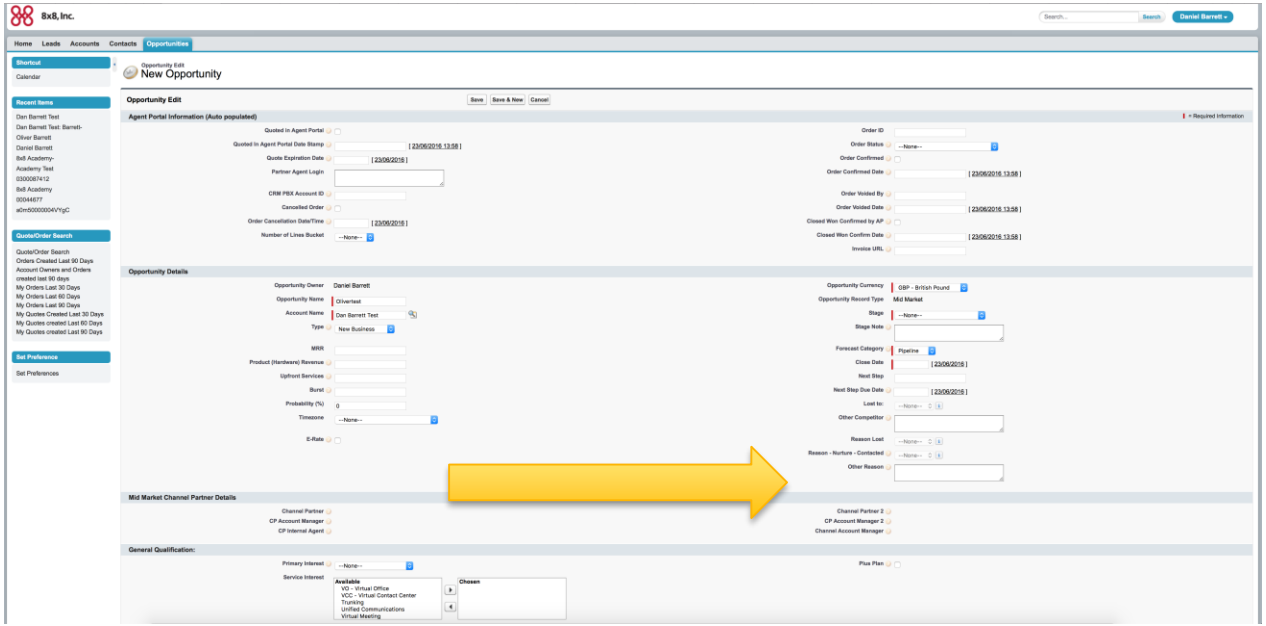
Opportunity Created



Populate required fields

** Important to populate the Product fields to let 8x8 know what you are going to quote/need resources for*

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Sales Stage Categories

Stage	Forecast Category	Percentage	Prerequisites
Discovery-Ch	Omitted	0%	Lead
Qualified-Ch	Pipeline	5%	Gross Feature compatibility, Rough timeframe for close
Live Demo Complete-Ch	Pipeline	5%	Decision Makers ID'd, Rough timeframe for close
Price Quote-Ch	Best Case	25%	Competition, Urgency, Budget, Coach Sold, Feature Advantage/Meet Requirements, SE Analysis, Contract ended or ending with current provider, Close Date Target known, Partner has chosen us to win, "In-ballpark" response to quote
Ts&Cs Negotiation-Ch	Commit	90%	Offer match/advantage
Verbal Select-Ch	Commit	90%	Procurement cycle started, User Buyer sold, Economic buyer sold, Credit App, Close date in current quarter
Reference Check	Commit	90%	Close confidence, Partner Confidence, User Buyer sold

Must choose when creating an opportunity: Mandatory field!!!

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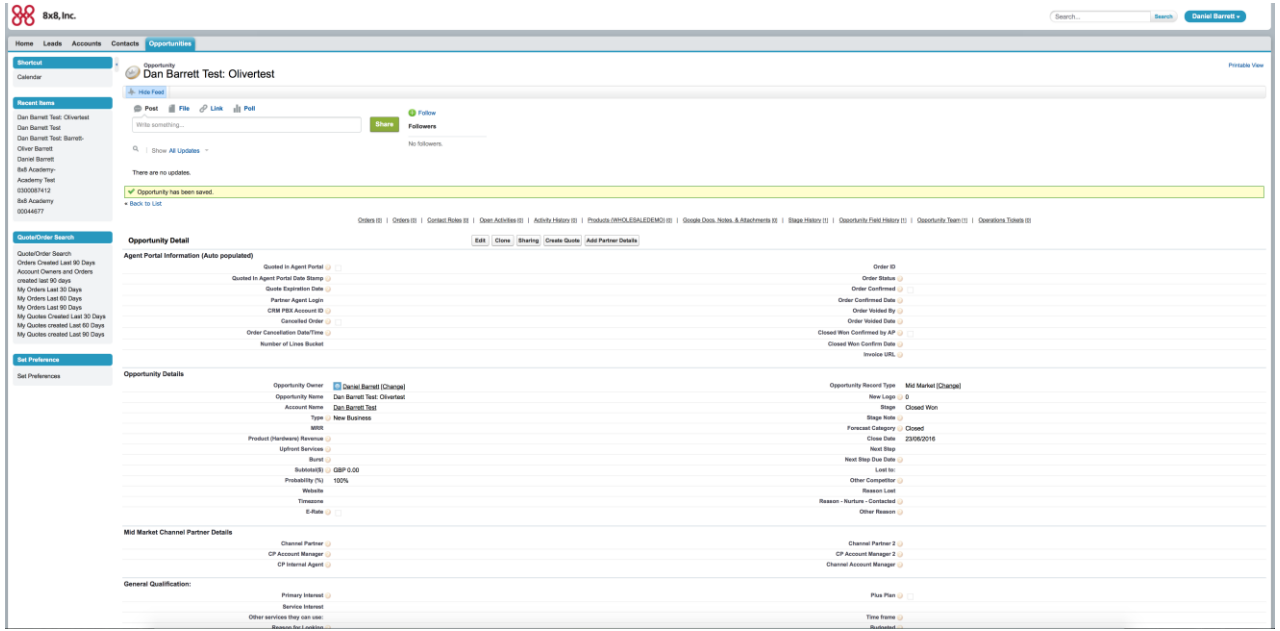
Opportunity Details



Now the opportunity is created, scroll down this page to create an Quote under the opportunity.

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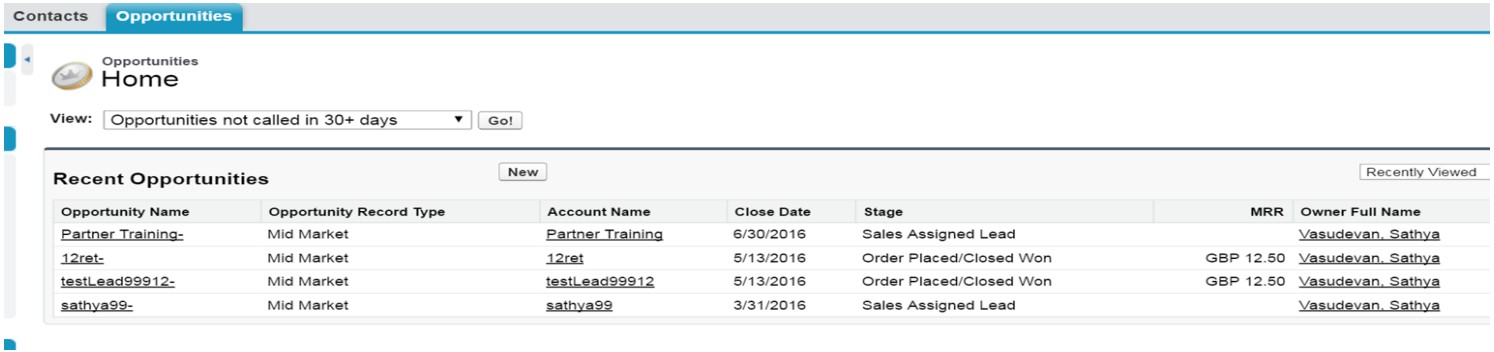
Opportunities



Tip: You can access the quotes section at any time by clicking on the opportunities tab and selecting from the list below.

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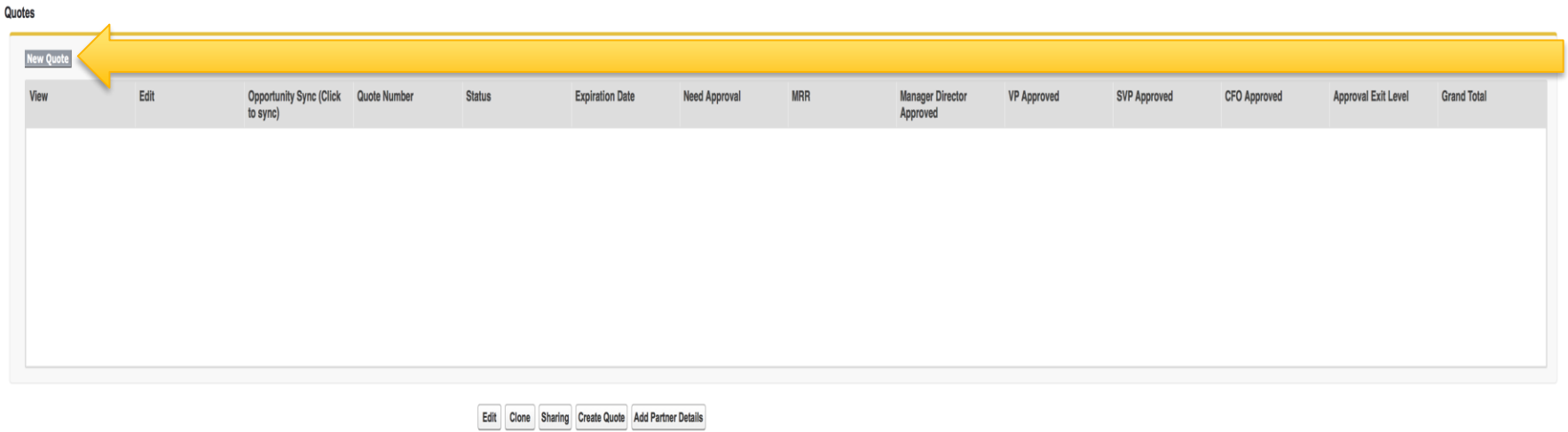
Start Partner Quote from Opportunity



Click the “New quote” button.

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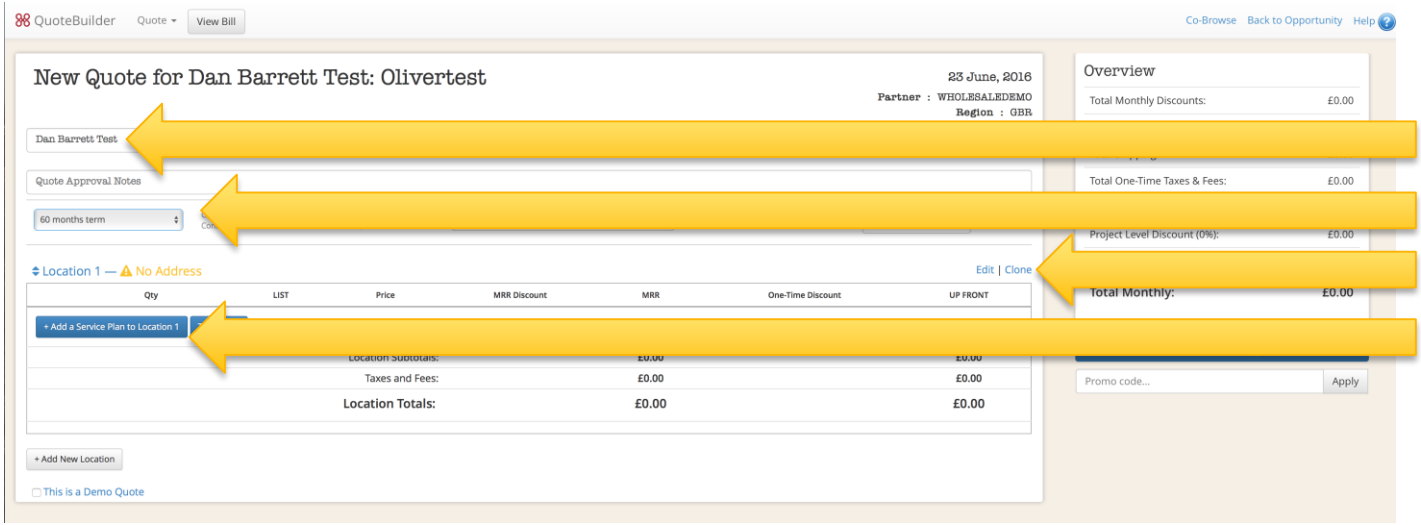
Quote page



New quotes:

Name the quote

Select Term

Edit Address

Add Services

TIP: Adding services and editing location information is the same as it was on agent portal

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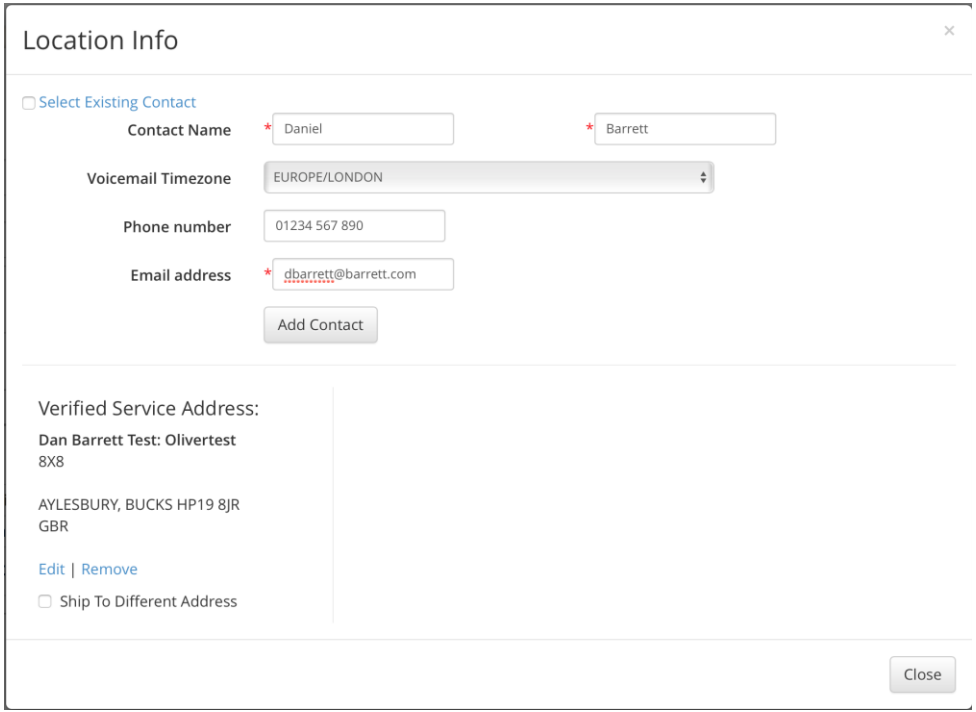
Contact and Address Info



Complete the required fields and validate address look up

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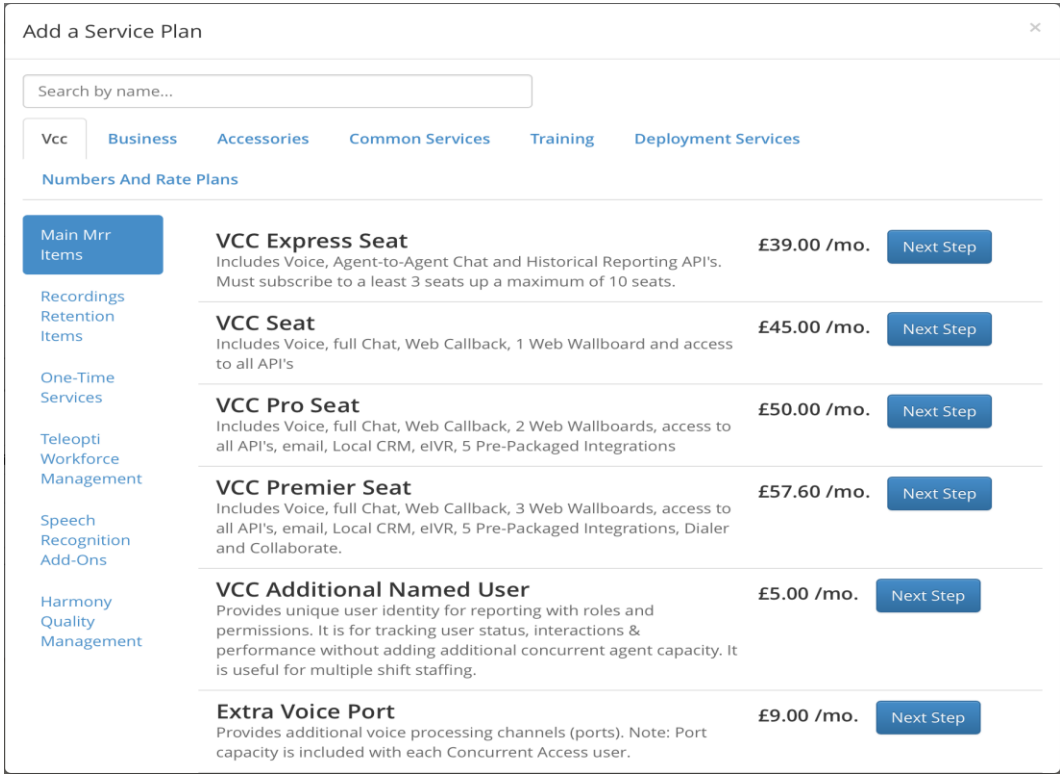
Partner quote adding services



Create a quote for;

20 x VO seats
4 x VO Pro Seats
2 x Virtual Numbers
1 x Ring group

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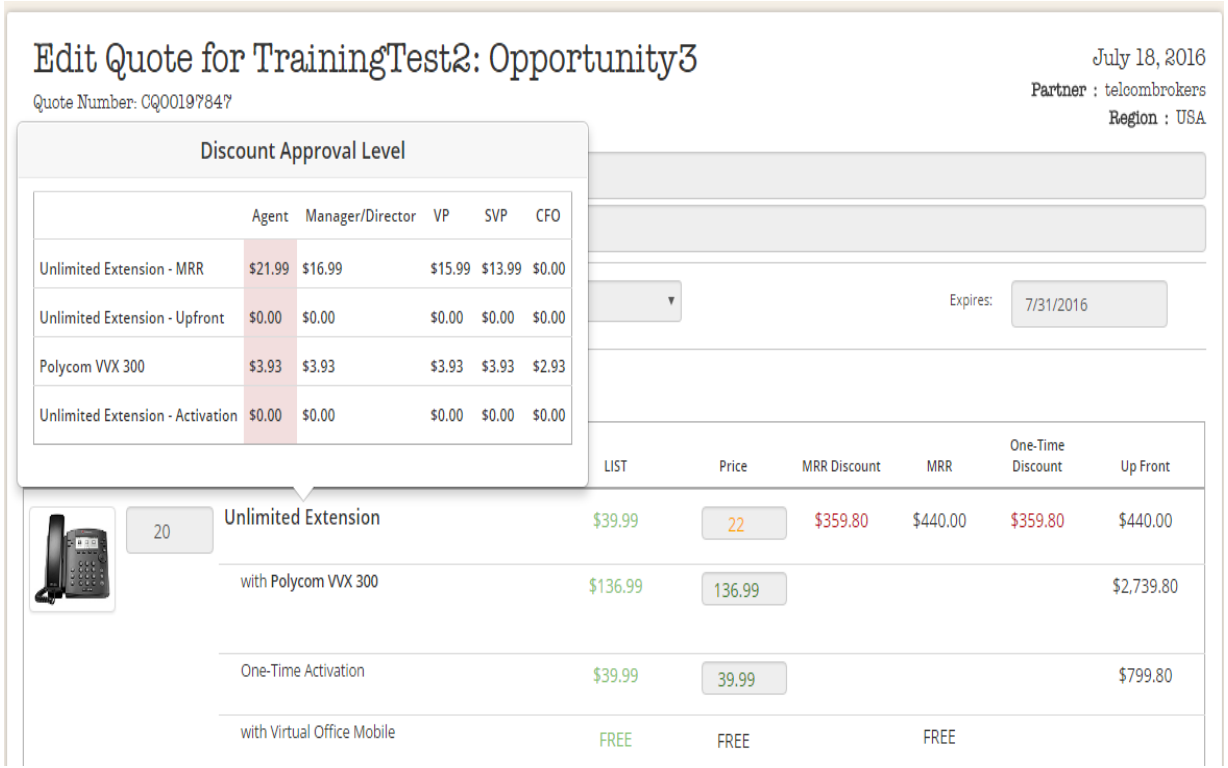
Pricing and other changes



Change pricing by clicking in price box and using arrows or typing new price over.

Approval levels are listed by hovering over product name

Colors of price change based on approval needed

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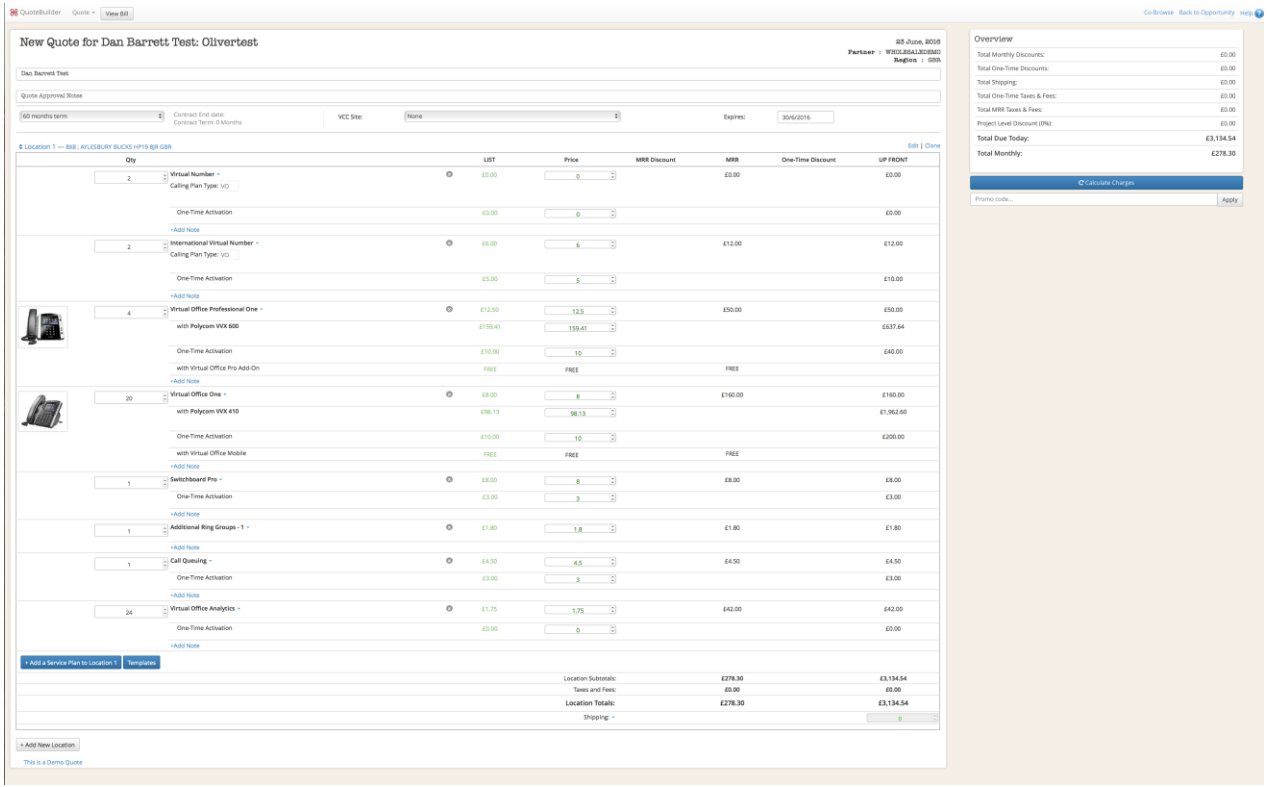
Quote



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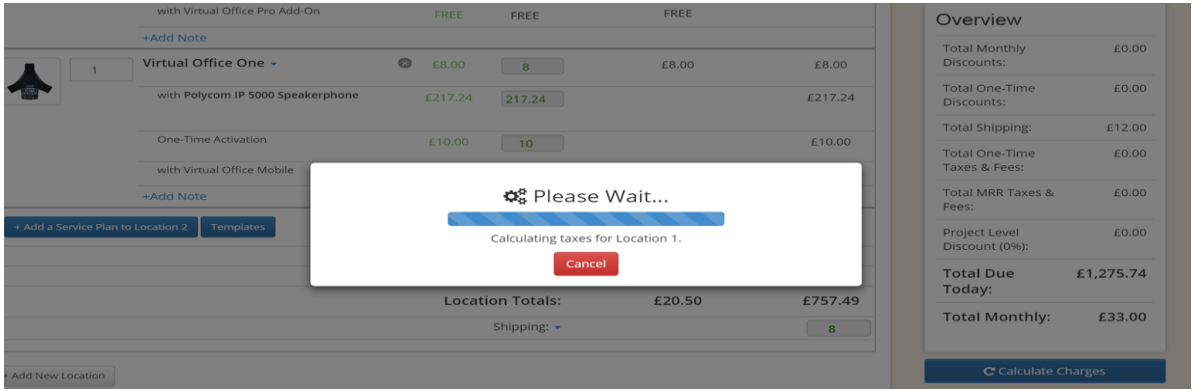
Calculate Shipping charges and taxes



Important to do this or quote will error out when saved

Location Subtotals:	£278.30	£3,134.54
Value Added Tax	£55.66	£646.11
Taxes and Fees: (Hide Details)	£55.66	£646.11
Location Totals:	**£333.96**	**£3,876.65**
Shipping:		96

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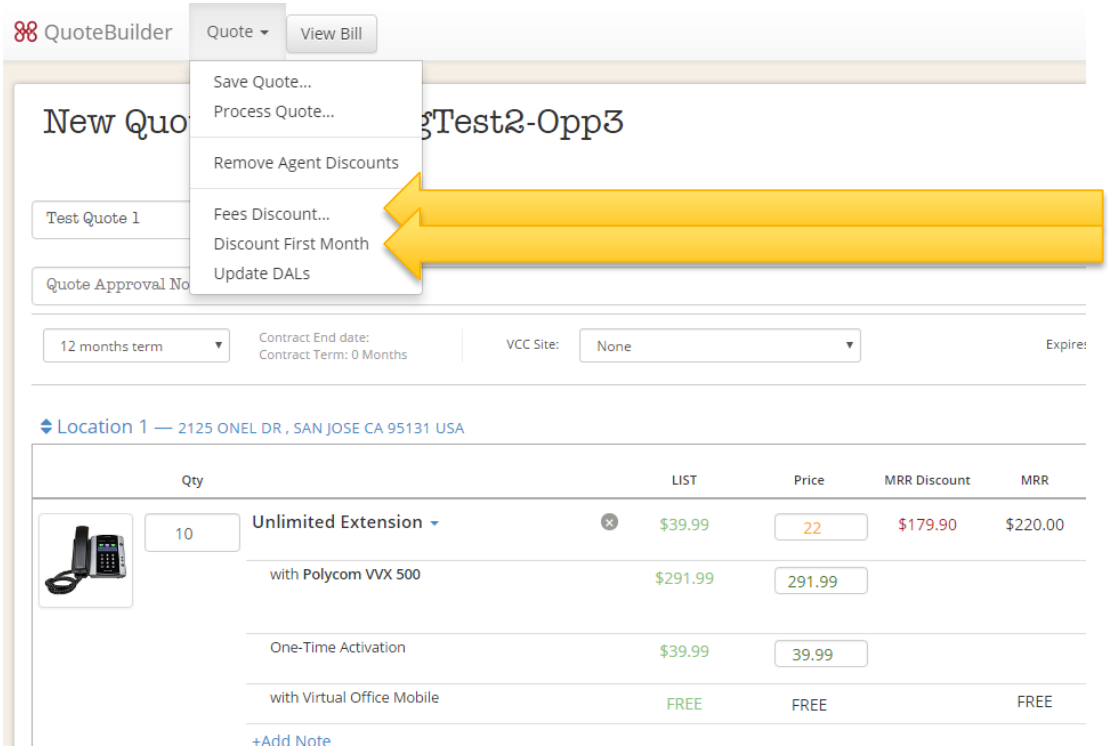
Discounting Fees and First Month



Click “Quote” button at top to:

Discount E911 and RRF fees by clicking Fees Discount

Discount First Month if needed for competitive reasons

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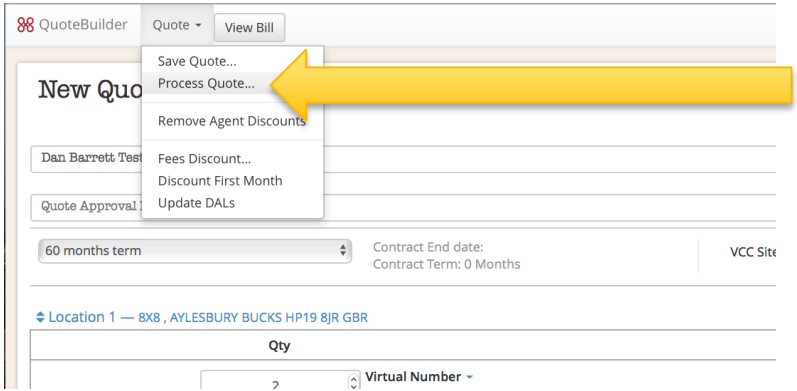
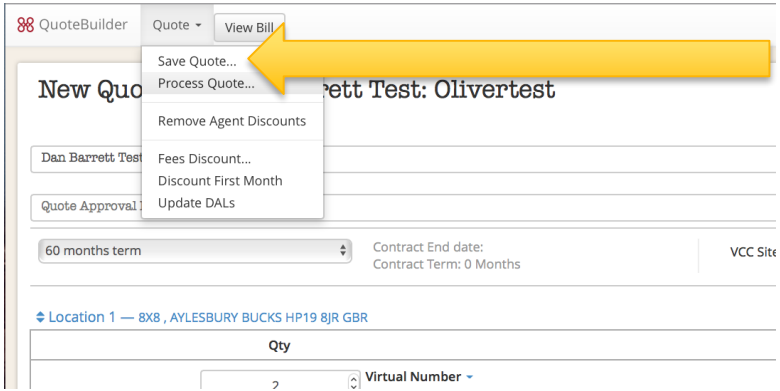
Process or Save Quote



Once you are happy with the quote, you need to process the quote to create the order.



Or Save the quote instead to come back and finish it at a later date

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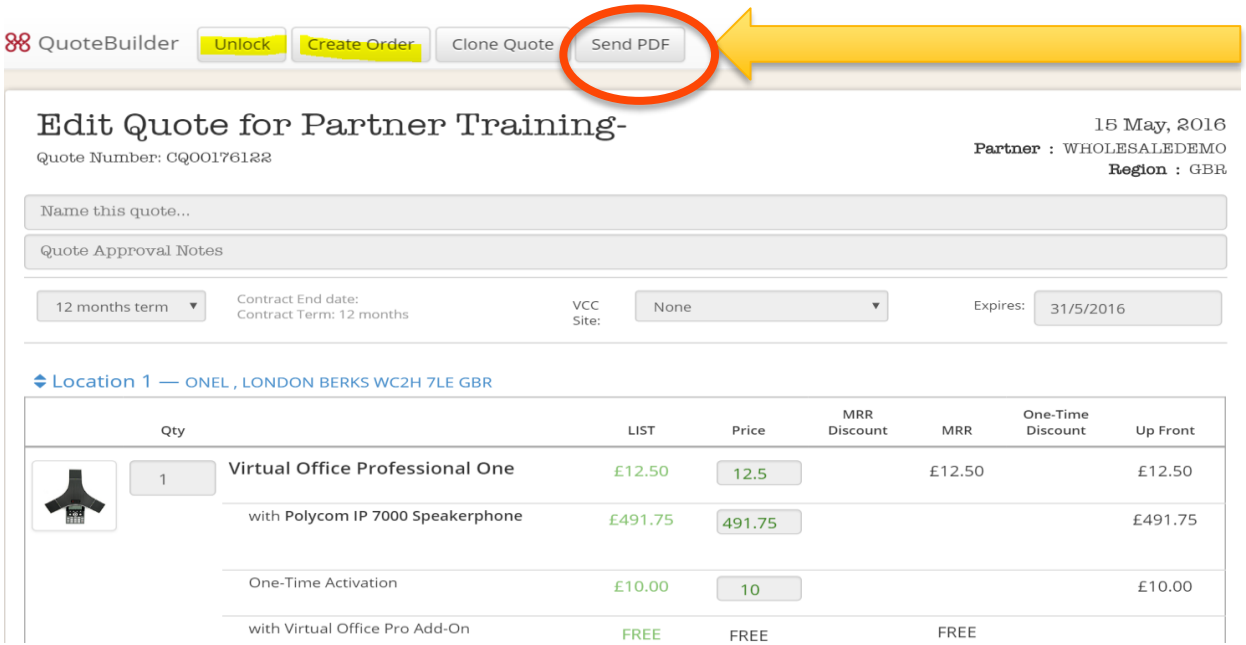
Unlock or Send quote



If saved, Unlock to edit

If ready to send quote – Click Send PDF

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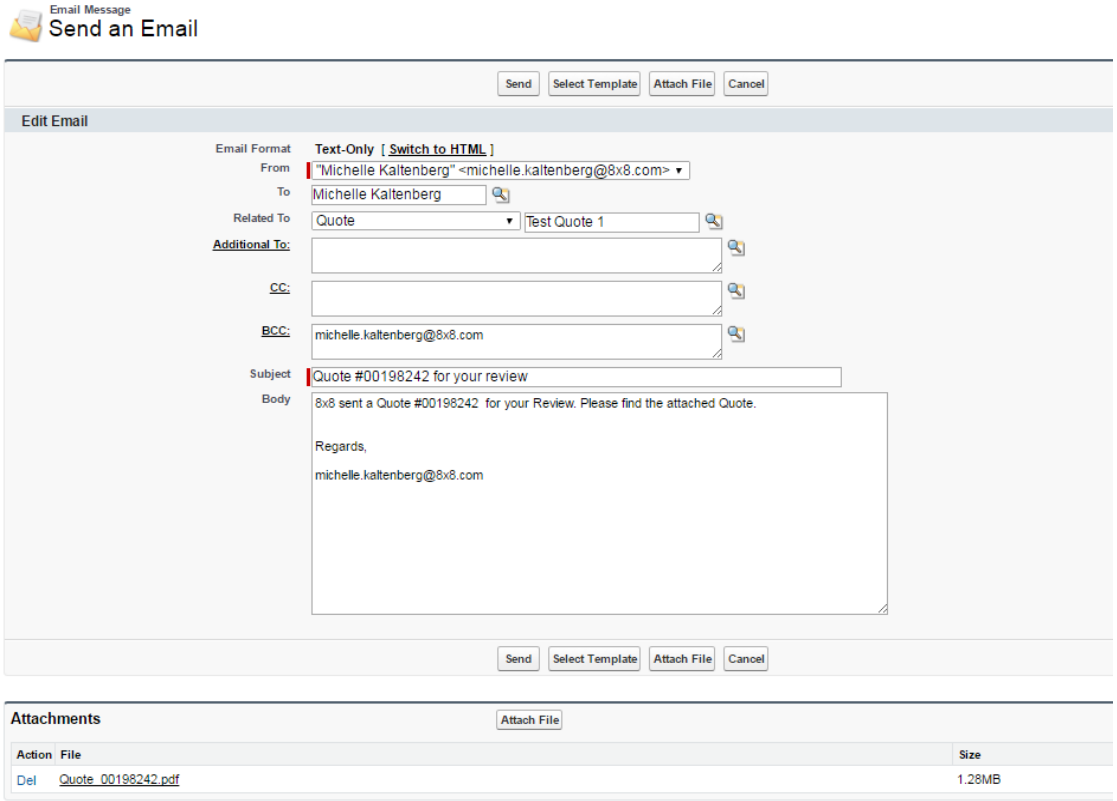
Send email of Quote (Send PDF button)



Important Note: before this screen pops up – a screen of the quote/collateral will pop first – it goes away by itself after 2 to 20 seconds. Do nothing during that time!!

Fill in information in this form to send quote to customer. Can add additional attachments at bottom. Click Send when ready

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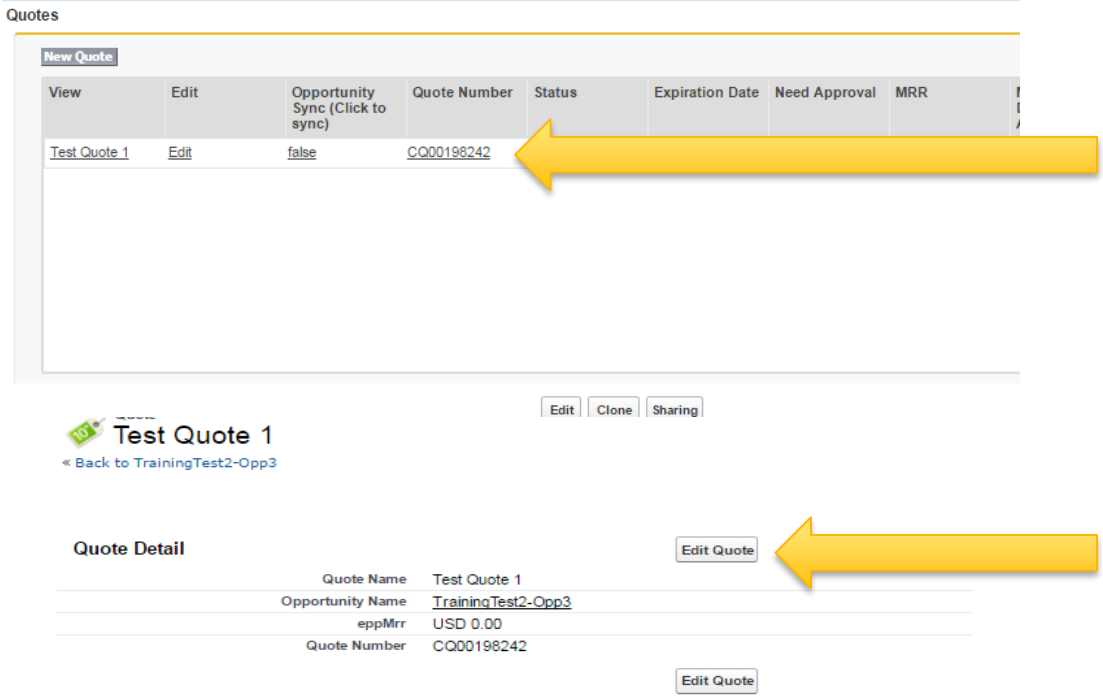
Edit Quote to Create Order



When customer is ready to place order:
Find quote in Opportunity screen and click on quote number

Click Edit Quote

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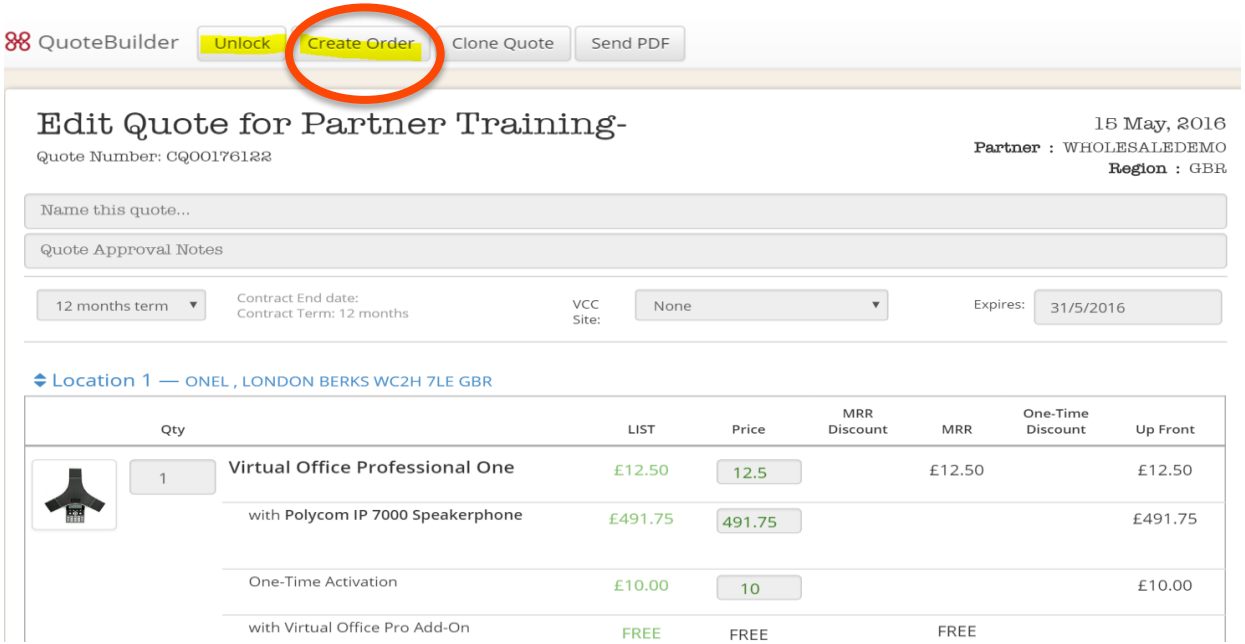
Create Order



Click Create Order to start process

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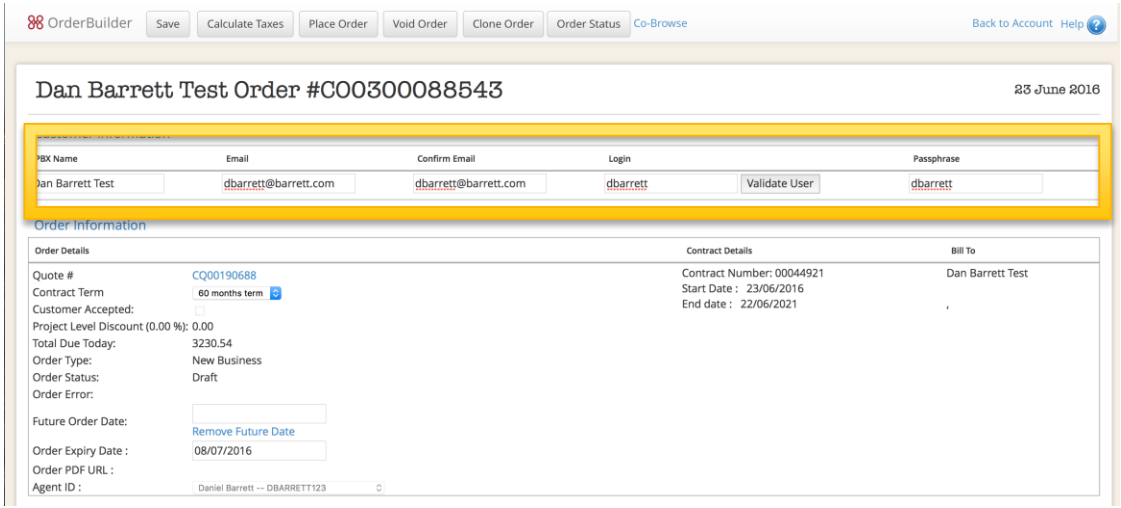
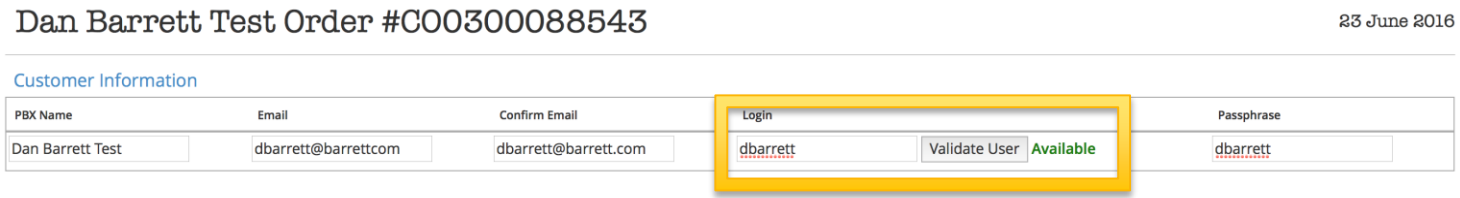
Order validations



Populate the top fields and validate user login



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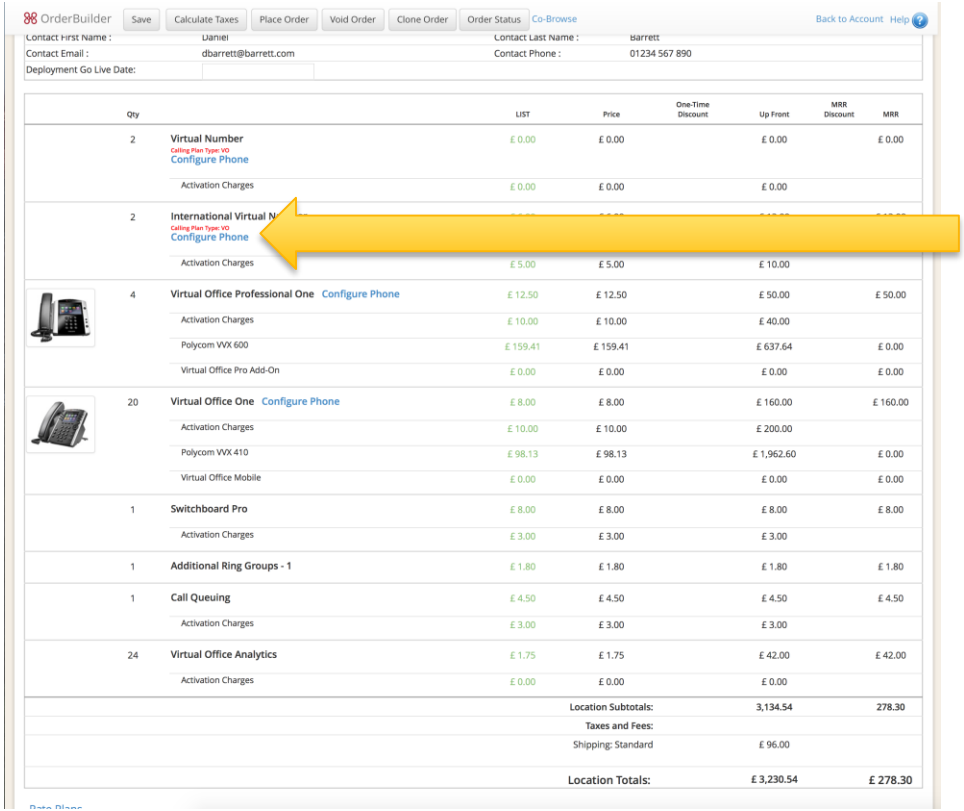
Configure Phone Numbers



But wait….

We havent configured the phone numbers.
Click on configure phone to select the numbers.

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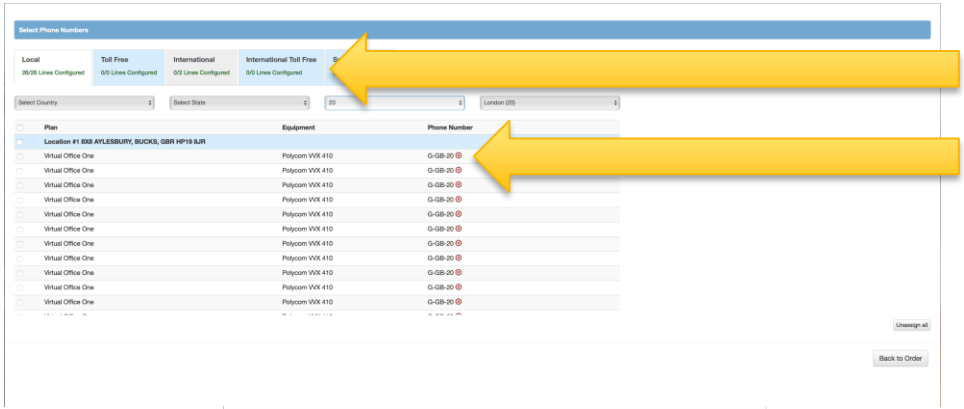
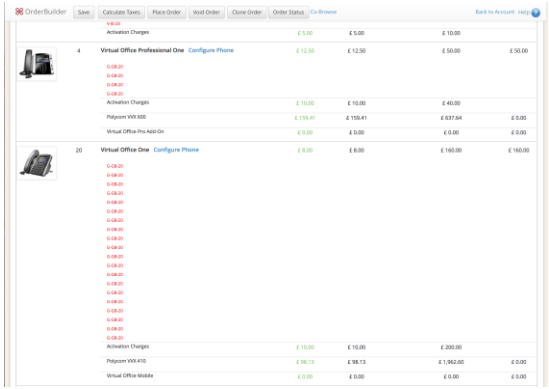
Configure Phone Numbers





Along the top you can see different tabs for different number natures.

We can see with have both local and international numbers to assign.

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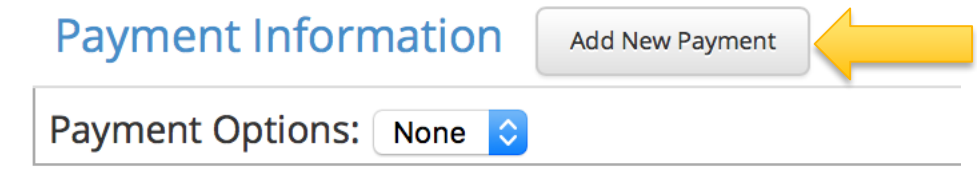
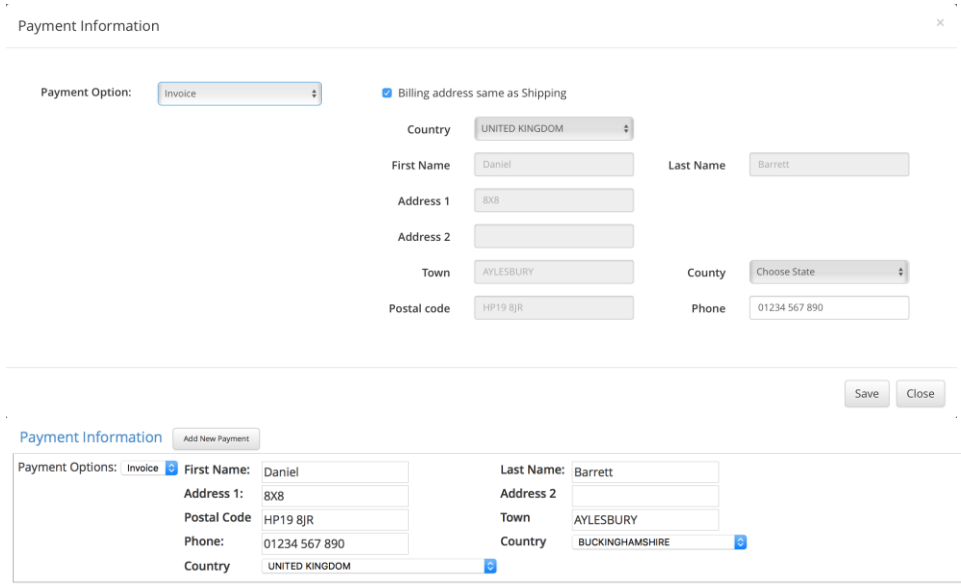
Payment



Click add new payment, select invoice and save.



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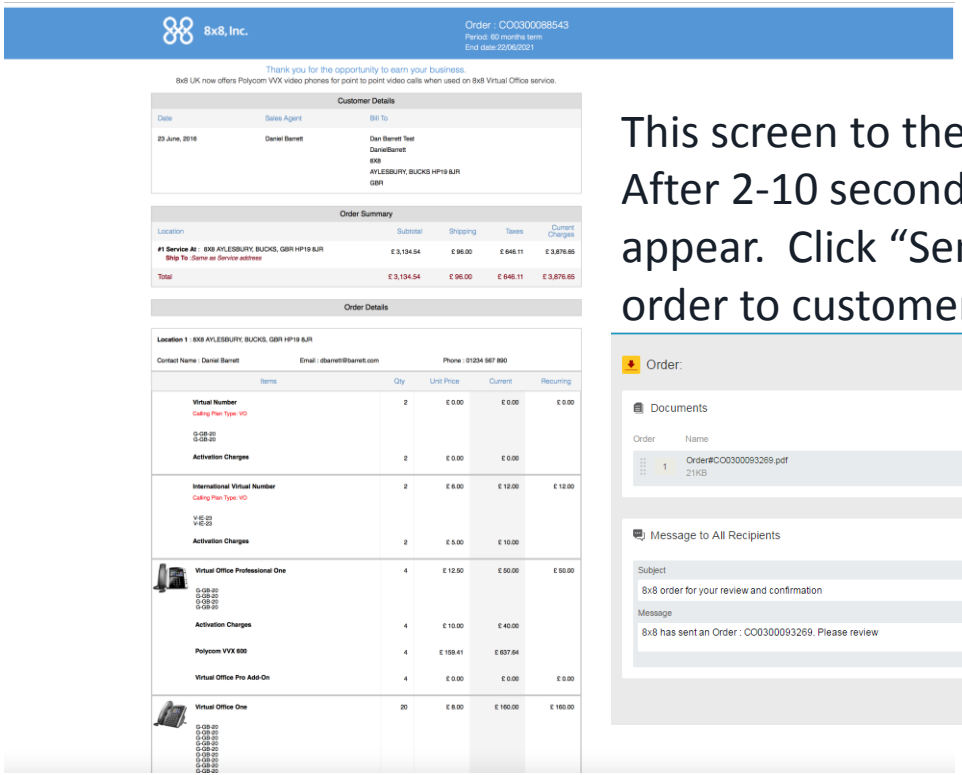
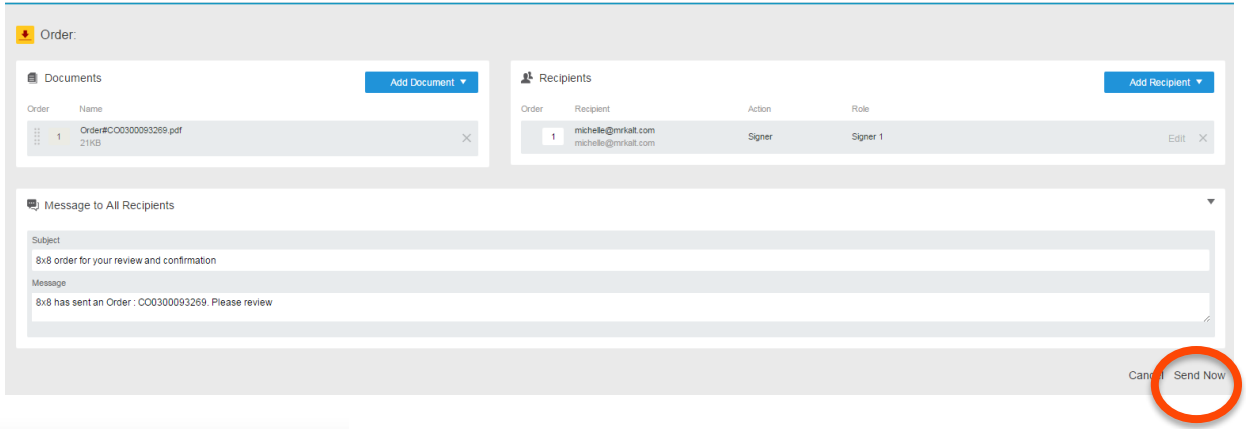
Place the order, send documents to sign



This screen to the left will appear if first if order is processed. After 2-10 seconds it will disappear and this screen below will appear. Click “Send Now” in bottom right corner to send order to customer



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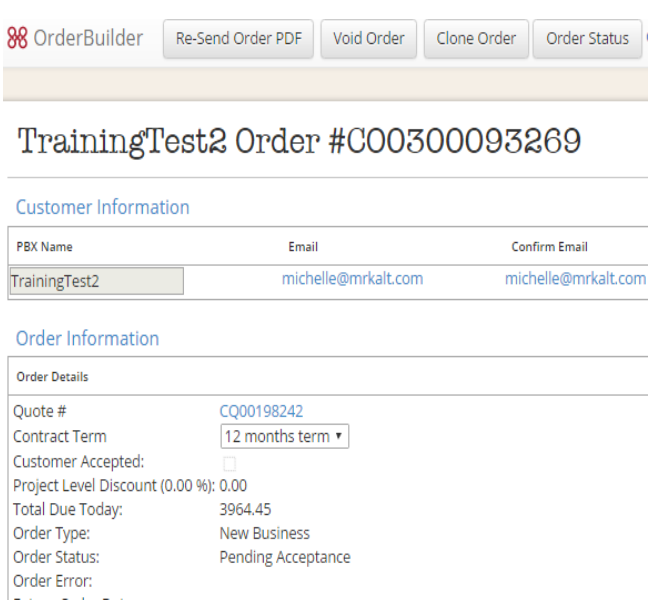
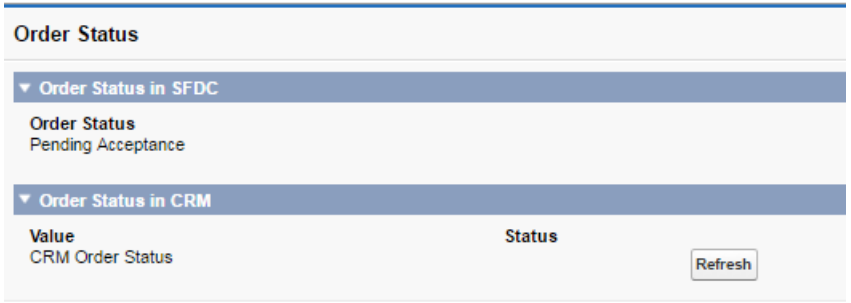
Confirm order status



Click “Order Status”



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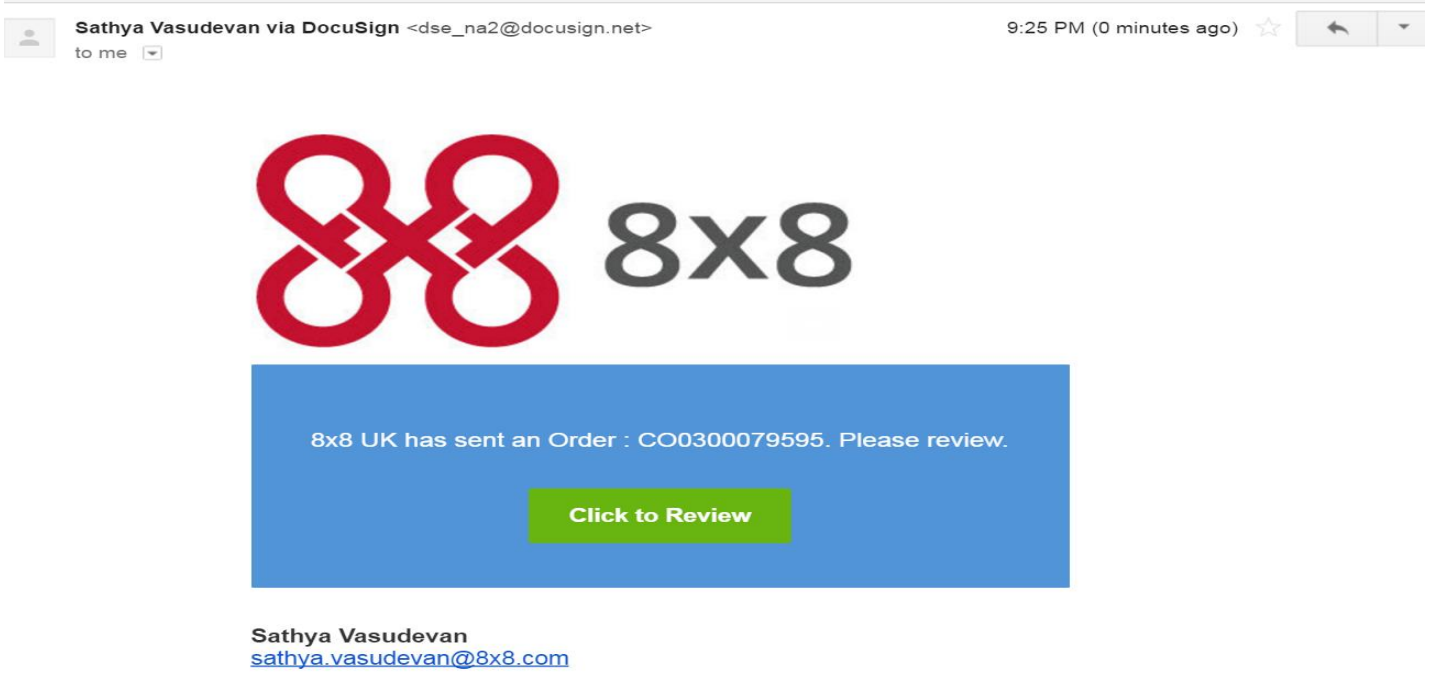
Customer receives the order for confirmation



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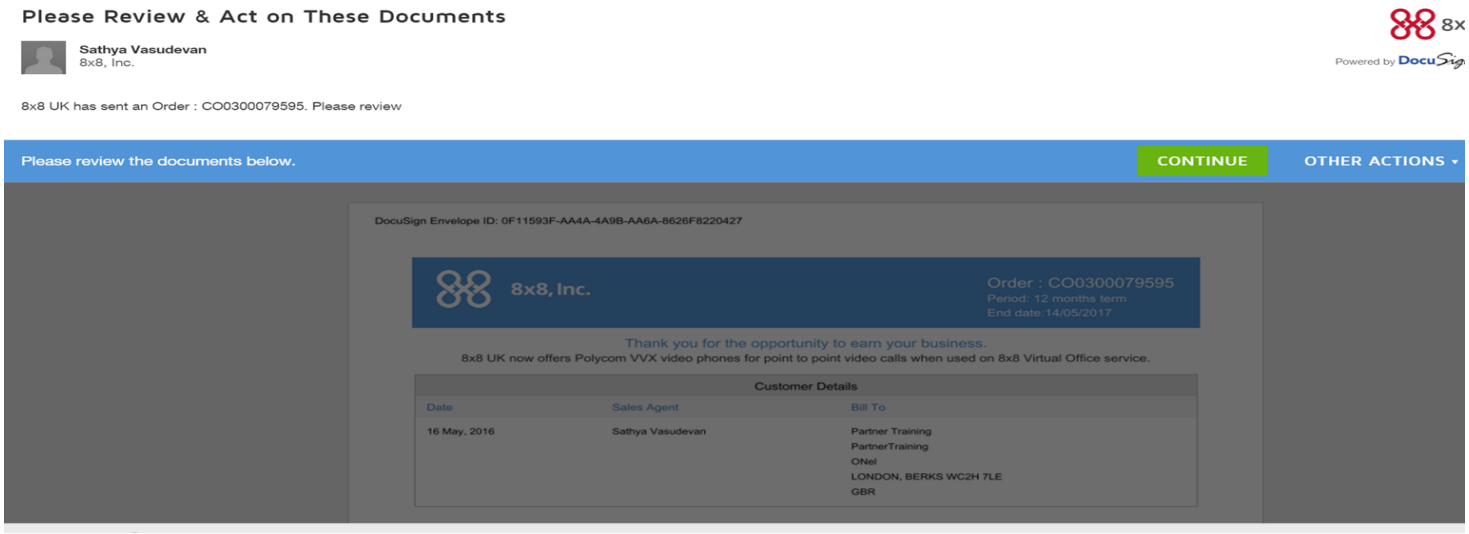
Customer reviews order



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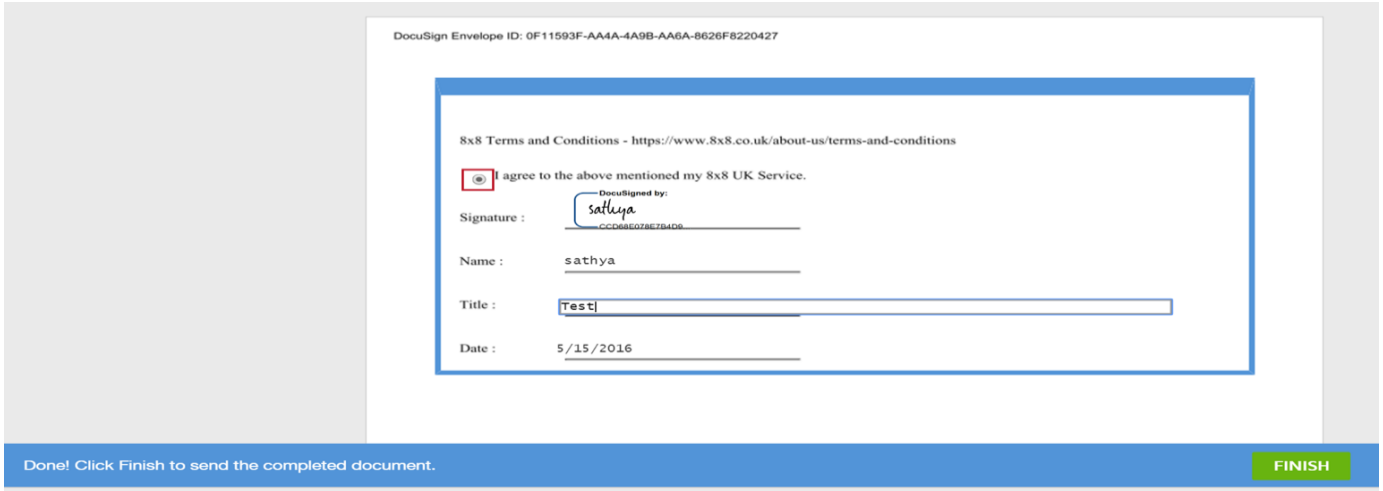
Customer agrees T&C and Confirms order



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Order pending customer acceptance

Partner Training Order #CO0300079595

15 May 201

Customer Information

PBX Name	Email	Confirm Email	Login	Passphrase
Partner Training	sathya.vasudevan@8x8.com	sathya.vasudevan@8x8.com	partner_sathya	welcome123

Order Information

Order Details		Contract Details	Bill To
Quote #	CQ00176122	Contract Number: 00042512	Partner Training
Contract Term	12 months term	Start Date : 15/05/2016	ONel
Customer Accepted:		End date : 14/05/2017	LONDON, BERKS WC2H 7LE
Project Level Discount (0.00 %):	0.00		
Total Due Today:	1530.89		
Order Type:	New Business		
Order Status:	Pending Acceptance		
Order Error:			
Future Order Date:			
Order Expiry Date :	30/05/2016		
Order PDF URL :	View PDF		

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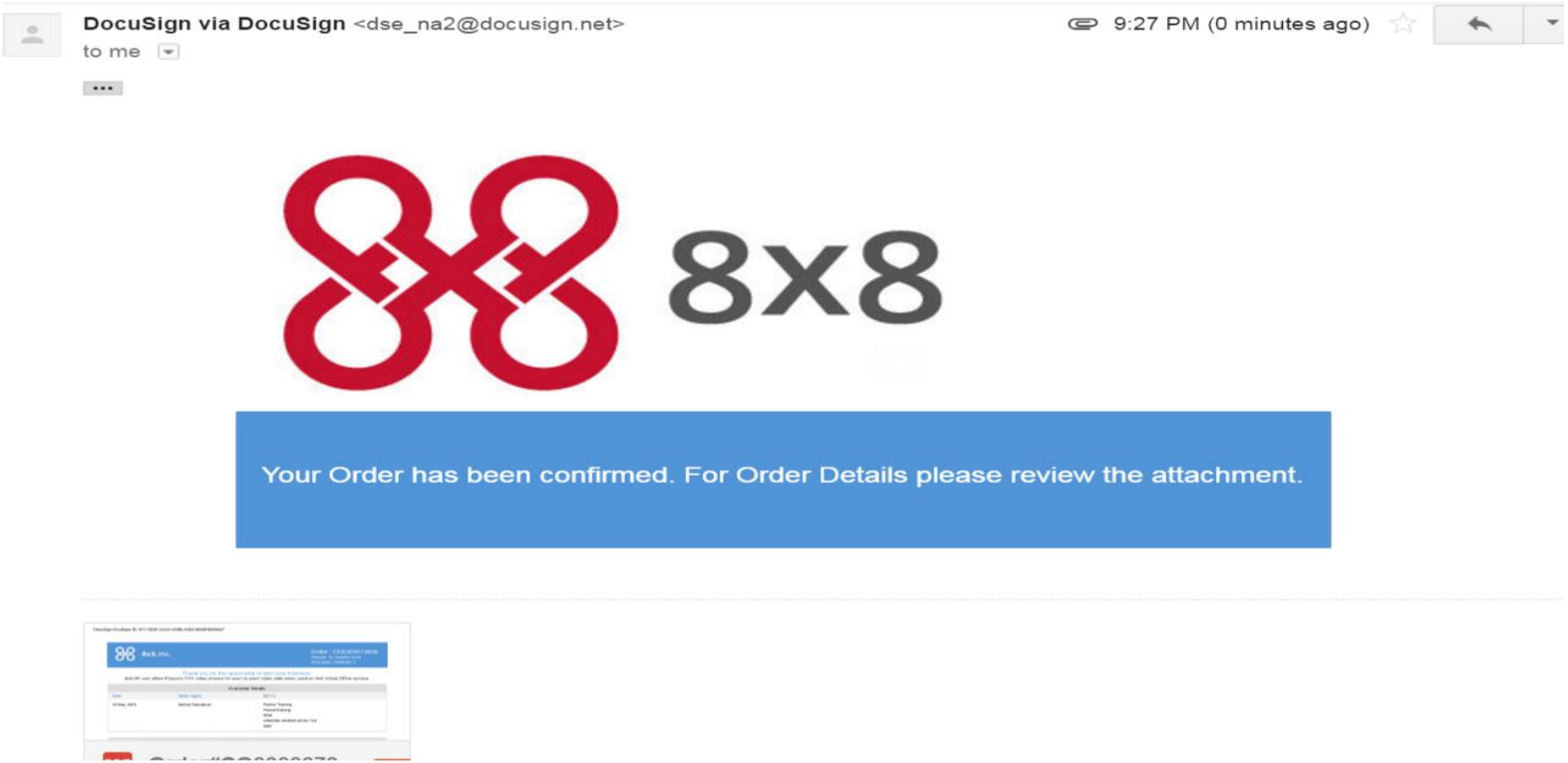
Partner receives signed document as PDF



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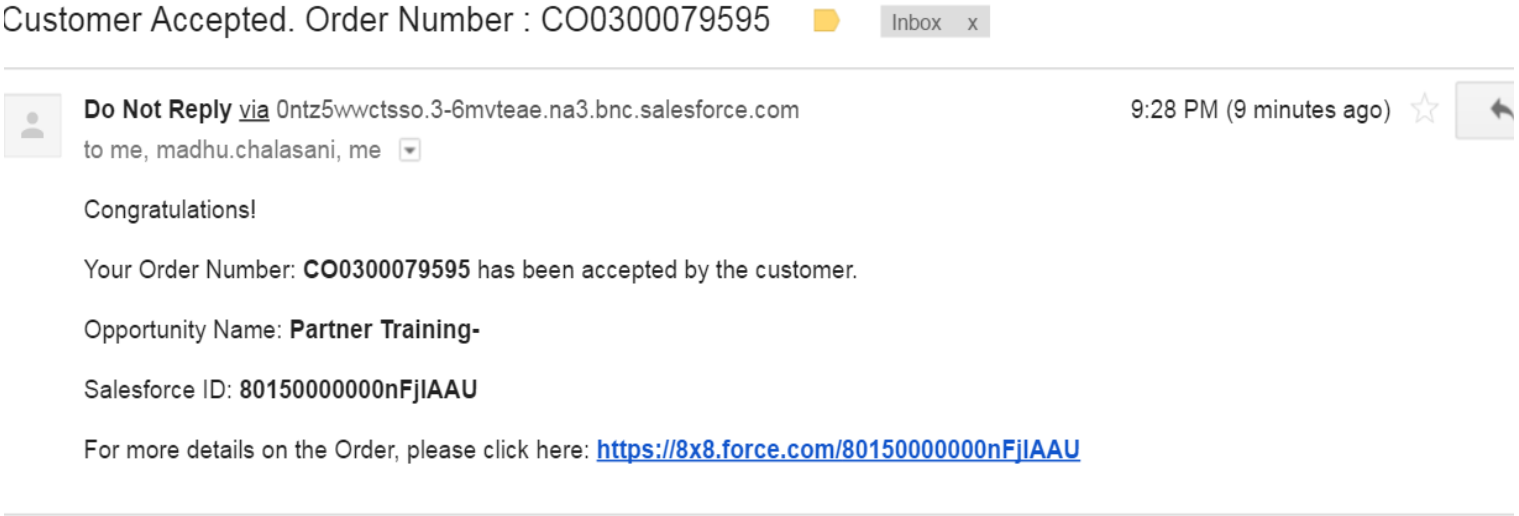
Customer accepted email



Customer Accepted. Order Number : CO0300079595 Inbox x

Do Not Reply via 0ntz5wwctsso.3-6mvteae.na3.bnc.salesforce.com 9:28 PM (9 minutes ago)

to me, madhu.chalasani, me

Congratulations!

Your Order Number: **CO0300079595** has been accepted by the customer.

Opportunity Name: **Partner Training-**

Salesforce ID: **80150000000nFjlAAU**

For more details on the Order, please click here: **https://8x8.force.com/80150000000nFjlAAU**

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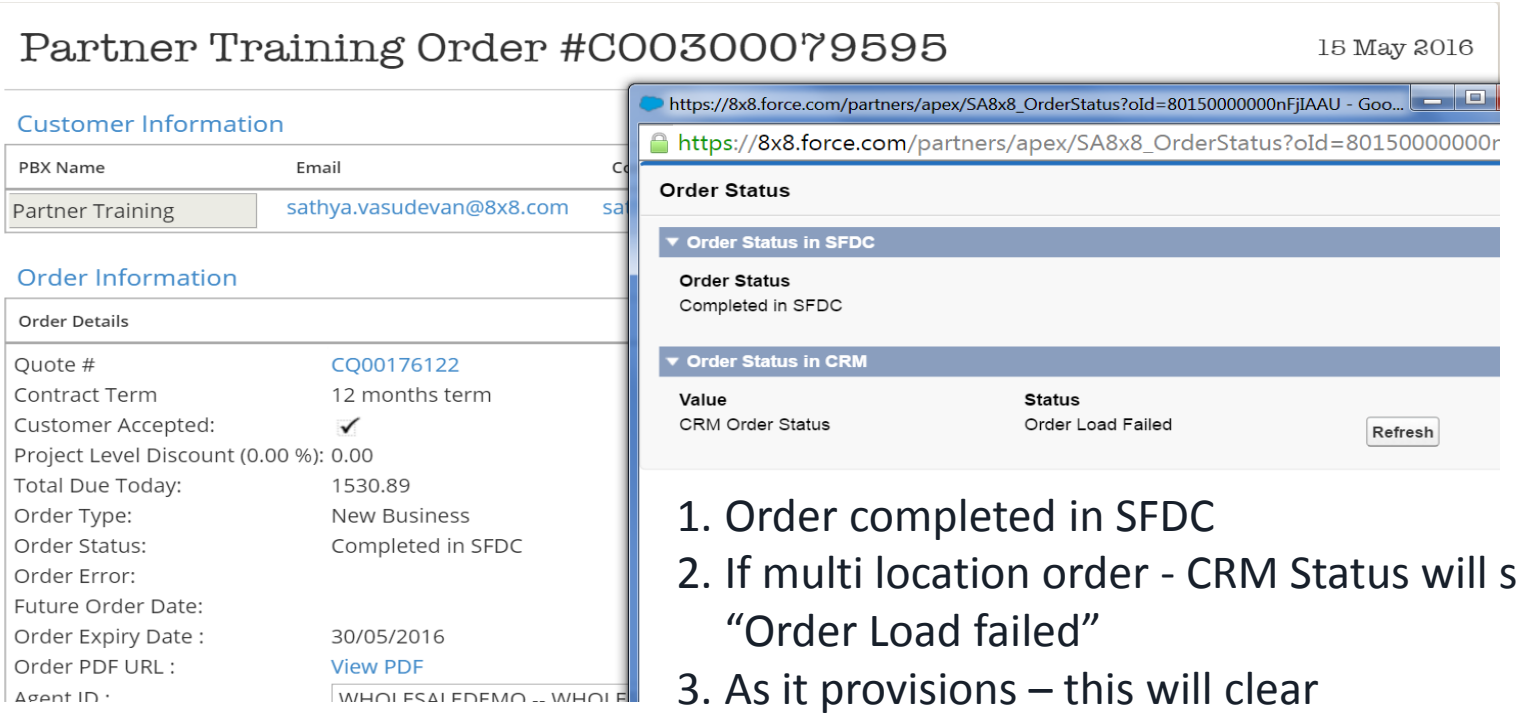
Order completed



1. Order completed in SFDC
2. If multi location order - CRM Status will show- "Order Load failed"
3. As it provisions – this will clear

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3. Additional Orders Sample

And then some…

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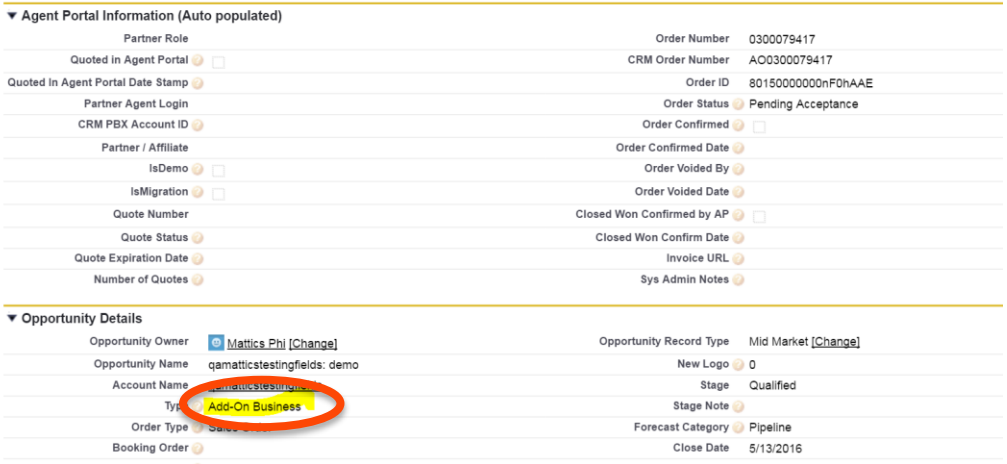
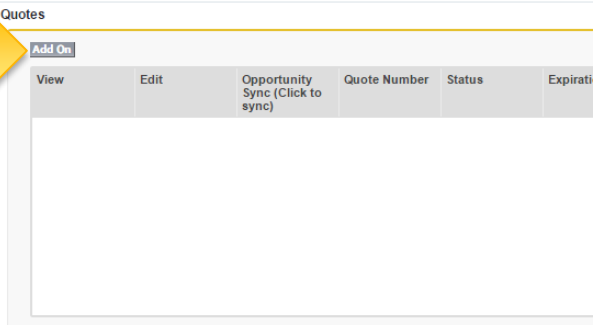
Create New Opportunity - Add on Quote



Make sure type is “Add-On Business”

Click “Add On” to start



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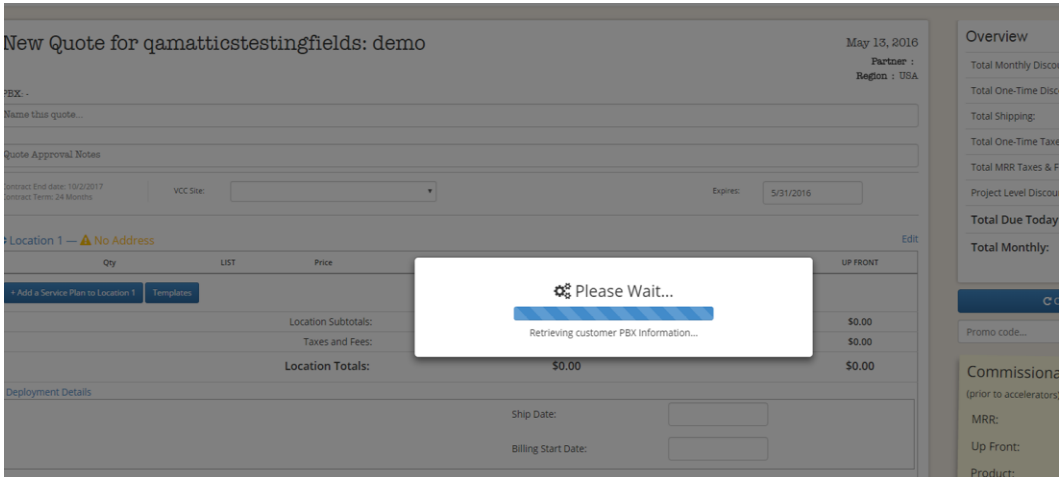
Add on Quote



Retrieve the PBX Info

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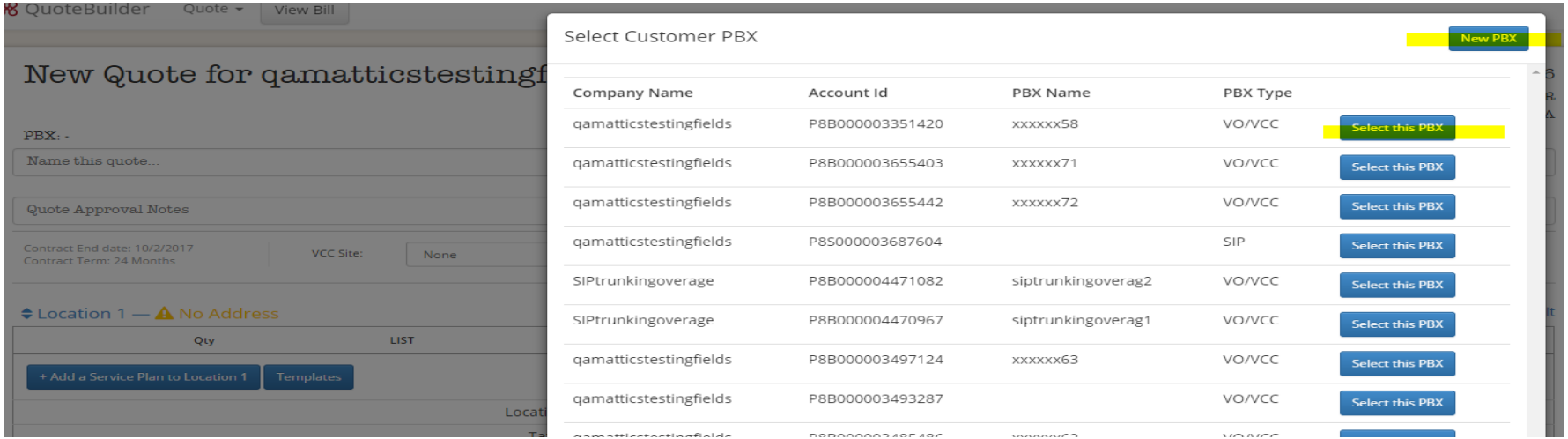
Select the PBX name



Choose existing PBX and add services

Add new PBX on same account

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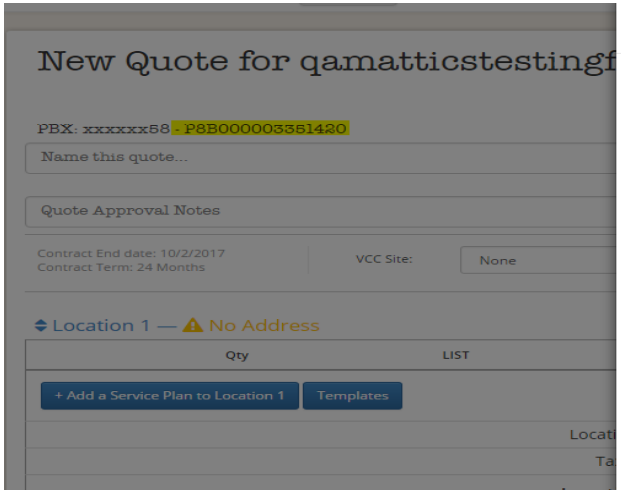
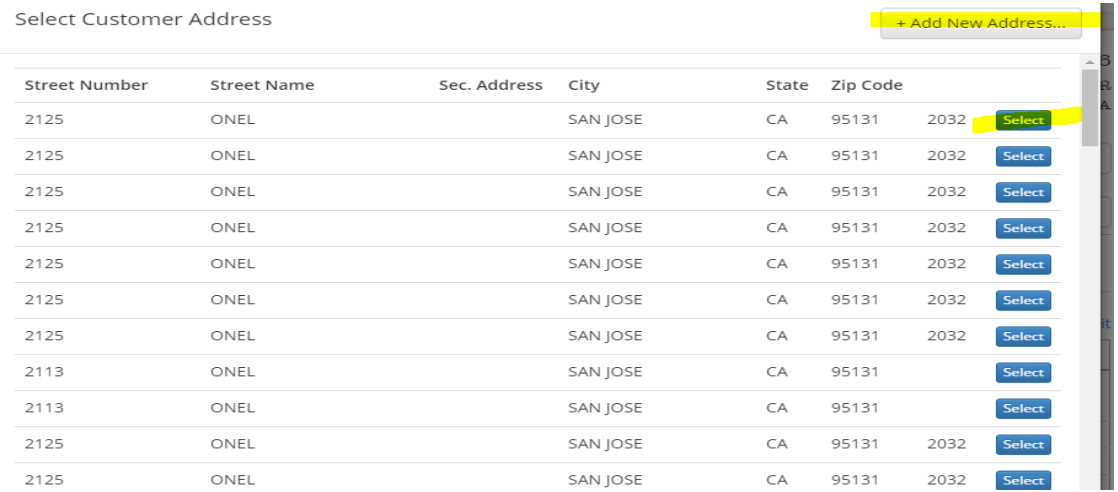
Choose the address





Choose existing address

Add new address

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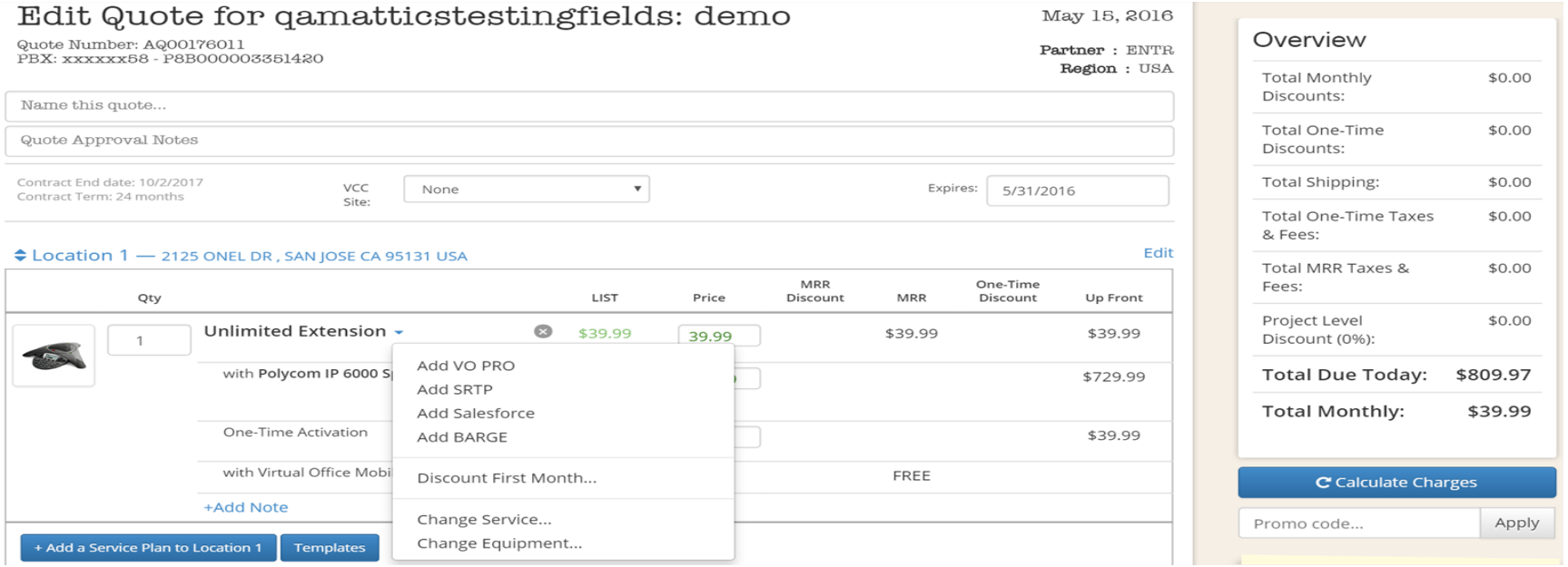
Add On quote page



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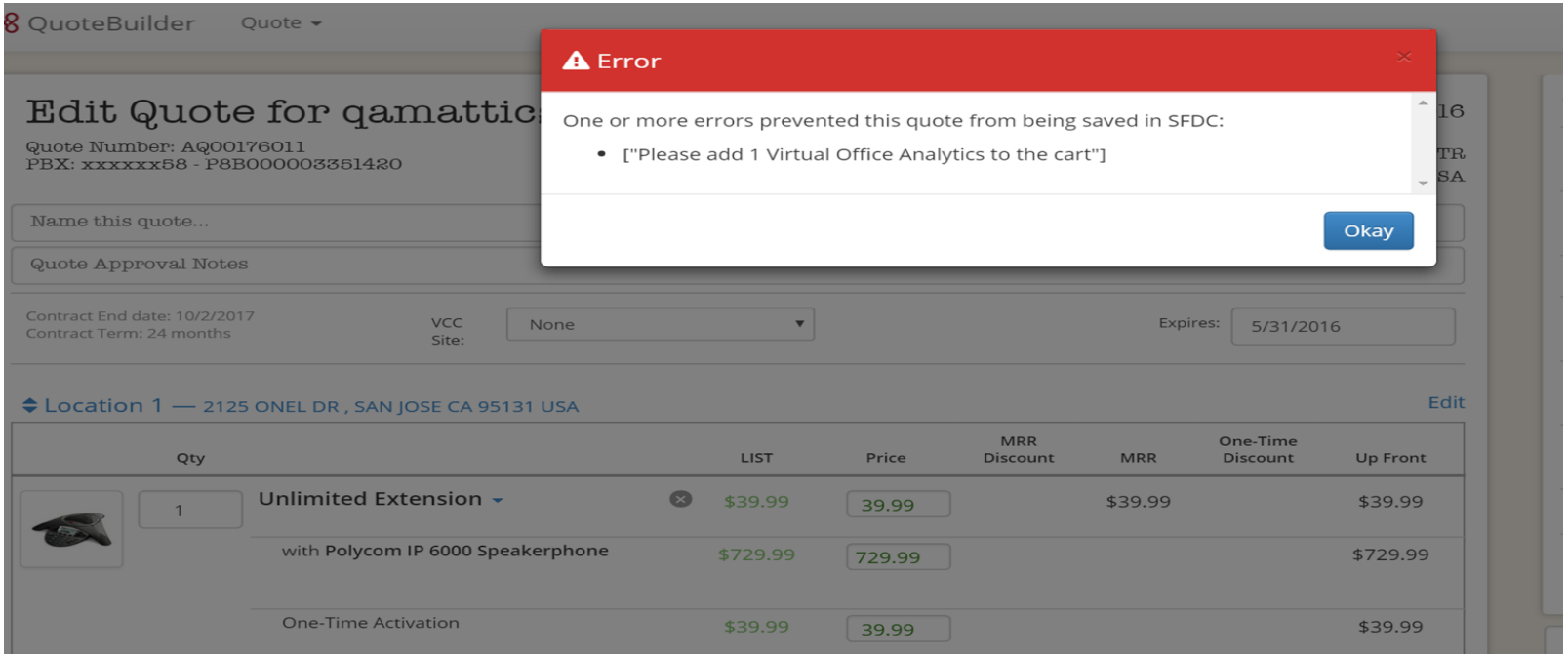
Process add on quote



Error - The validation popup to indicate the agent of any missing dependency

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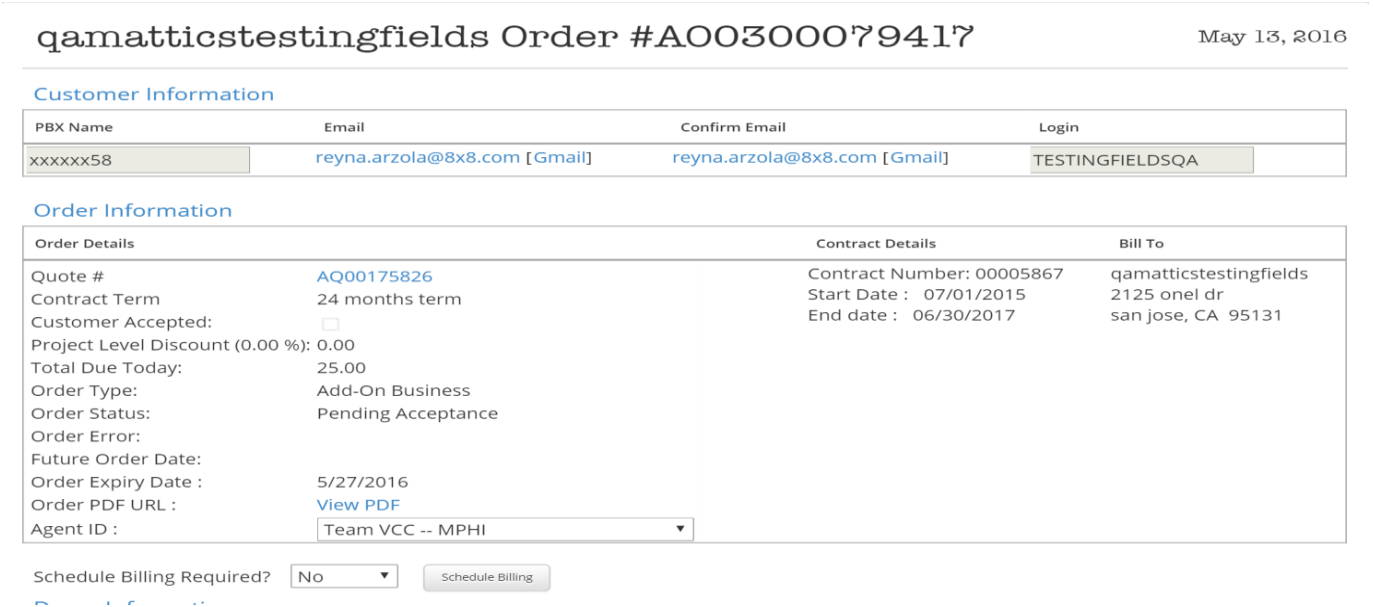
Add on order page



qamatticstestingfields Order #A0030007941? May 13, 2016

Customer Information

PBX Name	Email	Confirm Email	Login
xxxxxx58	reyna.arzola@8x8.com [Gmail]	reyna.arzola@8x8.com [Gmail]	TESTINGFIELDSQA

Order Information

Order Details		Contract Details	Bill To
Quote #	AQ00175826	Contract Number: 00005867	qamatticstestingfields
Contract Term	24 months term	Start Date : 07/01/2015	2125 onel dr
Customer Accepted:		End date : 06/30/2017	san jose, CA 95131
Project Level Discount (0.00 %):	0.00		
Total Due Today:	25.00		
Order Type:	Add-On Business		
Order Status:	Pending Acceptance		
Order Error:			
Future Order Date:			
Order Expiry Date :	5/27/2016		
Order PDF URL :	View PDF		
Agent ID :	Team VCC -- MPHI		

Schedule Billing Required? No Schedule Billing

1. Most of the fields will auto populate from SFDC since its an existing customer order
2. “Pending Acceptance” - Order is pending customer signature

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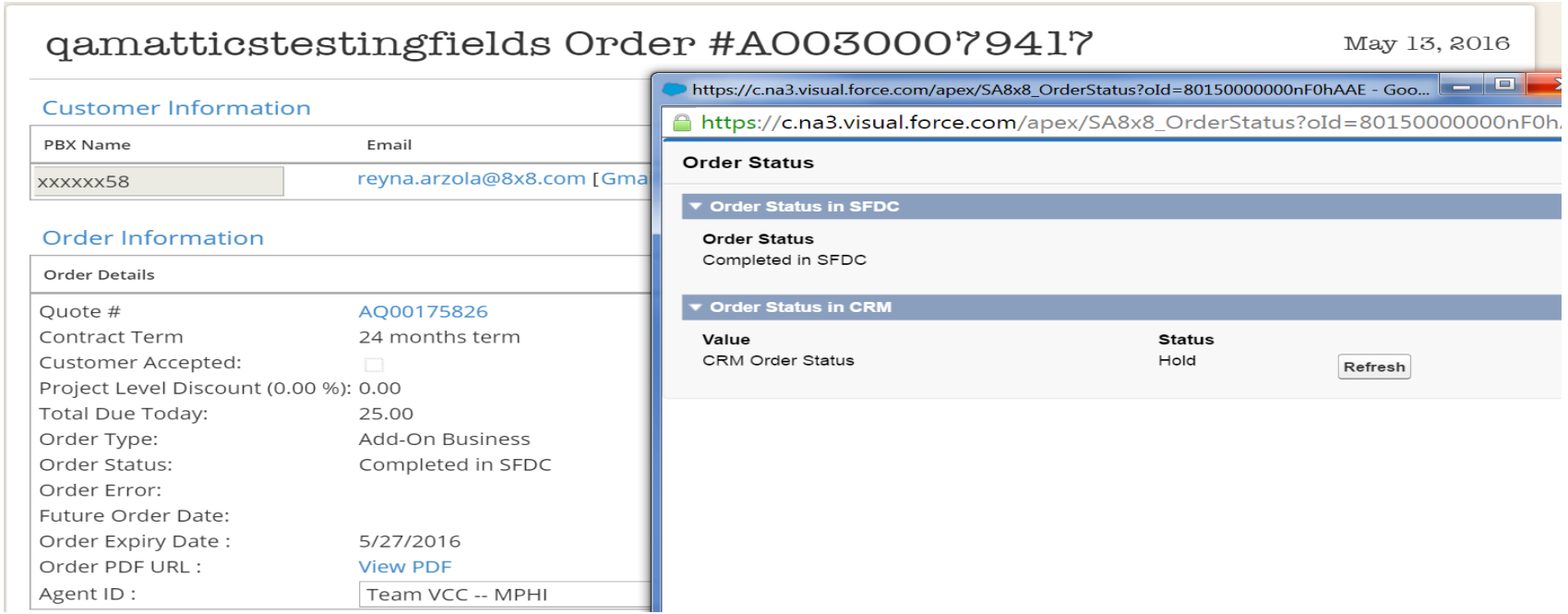
Completed Add on Order



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