

IGT-D Playbook for Salesforce

Revised 2.24.2020

Getting Started

Getting Started – Help & Support



Who to Contact for Help

Salesforce Questions	
<p>Salesforce Team email Send all Salesforce related questions and requests to: igtdsalesforcesupportusa@philips.com Expected response time: 24 business hours</p>	<p>Dan Ross Salesforce Analyst Mobile: (770) 876-3062 dan.ross@philips.com Location: Alpharetta (Eastern Time)</p>
<p>Hannah Cook Salesforce Analyst Mobile: (470) 214-7158 hannah.cook@philips.com Location: Alpharetta (Eastern Time)</p>	<p>Barbara Griffin Manager, Salesforce.com Mobile: (719) 428-8394 barbara.griffin@philips.com Location: Colorado Springs (Mountain Time)</p>

Pricing & Contracting Questions

1. Contact your assigned P&C Teammate directly
2. Email IGTD.SalesContracts@Philips.com
3. Call the Pricing & Contracting Team at (719) 447-2586

Getting Started – Supported Browser



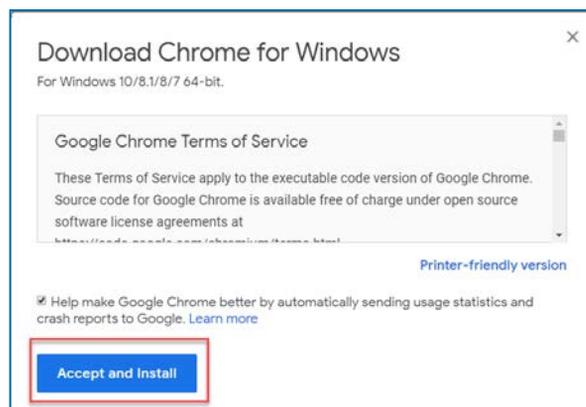
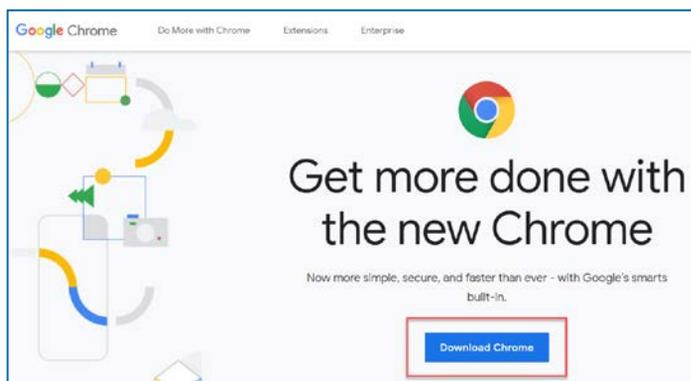
Google Chrome

PLEASE NOTE:

Note: It is strongly recommended that you do not use Internet Explorer with Salesforce as it has significant performance issues in Lightning Experience. The preferred browser to use Salesforce with no limitations is Google Chrome.

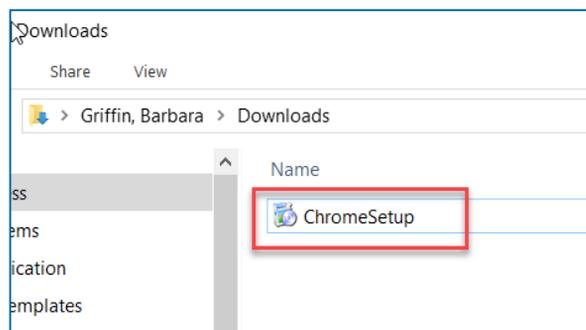
To download and install Google Chrome:

1. Go to:
<https://www.google.com/chrome/>
2. Click “Download Chrome”
3. Click “Accept and Install”
4. Open the “Downloads” folder on your computer
5. Double-click “ChromeSetup”
6. Follow prompts to complete installation



Important

The preferred browser to use Salesforce Lightning with no limitations is Google Chrome.



Welcome to Salesforce!



IGT-D SFDC Highlighted Features

Salesforce is Philips IGT-D's CRM, (Customer Relationship Management) system, that serves to complement, optimize, and improve our sales planning and strategic processes. Below are a few highlighted features that are relevant to your IGT-D sales role:

➤ **Home Page**

Components on the Home page are customized to provide you a quick overview of activities, items requiring action, and informative dashboards.

➤ **Reports and Dashboards**

View graphical representations and real time analyses of account data such as invoiced sales and products.

➤ **Contract and pricing term requests and approvals**

Submit your requests and follow them through the process with automated approval flows.

➤ **Opportunity Management**

Create and manage account opportunities such as Action Plans and IGT-D Lead Sharing.

➤ **Accounts and Account Team** Allows secure visibility to accounts and tools to collaborate with other arms of the business

➤ **Log Contacts** Central and convenient location to store and organize contacts that you establish.

➤ **Mobile App**

Access Salesforce from your smart phone or tablet and have immediate access to your data no matter where you are.

Salesforce Terminology



Key Record Types and Concepts



Business Process

Information entered into Opportunity records flows up into the pipeline. Therefore, it is expected that you keep the *Close Date* and *Stage*, fields on each Opportunity up-to-date—starting from the *earliest* stages of the sales process.



Business Process

Account Teams provide access to Accounts and their related information for Territory Managers. This is an essential piece in making Salesforce the shared source of truth for our collaborative process.

Salesforce uses some unique terminology. Here are some of the more frequently used record types, with the icons that distinguish them on their home pages and in search results.

Tab	Definition
 Account	Each Account record represents an entity with whom we do business. While <i>Customer Accounts</i> are integrated with our SAP and Oracle back-office systems, you can also create new <i>Prospect Accounts</i> . Other Account record types are discussed on the following page.
 Contact	The Contact record represents an <u>individual</u> . Each Contact is a direct “child” record of a specific Account, but may have Roles on other Accounts.
 Opportunity	Opportunities are specific, potential sales possibilities that have been identified. They are the principal means for tracking our client engagement process on each deal.
 Activities	We use Activities to assign <i>Tasks</i> to ourselves or others, and to <i>Log Calls</i> that capture customer interactions directly on the related records.
 Report	Reports are <i>real-time</i> summaries and analyses of your data. You can change date ranges, groupings, filters, add fields, save your own version, or export to Excel, etc. if necessary.
 Dashboard	Dashboards provide a <i>graphical representation</i> of the data within their underlying Reports. Click these charts, graphs, or tables to drill down into data in the source report.
 Chatter	Chatter is a foundational feature in Salesforce. It supports collaboration and visibility, via threaded conversations directly on records such as Accounts, Contacts, and Opportunities.
 Account Team	In our security model, for each Account record a specific group of users is authorized to view and make edits (including its Activities and related records, such as Opportunities).



Getting Started: Your Home Page



The Home page in Salesforce displays recently accessed records, charts from graphical “Dashboard” components that help track your book of business, “Assistant” reminders about overdue Tasks and Opportunities that need updating, and “key deal” access to your recent Opportunities.

The screenshot shows the Salesforce Home page for a user named 'IGTD Sales - North...'. The page features a navigation bar with 'Home' selected, and a search bar. The main content area is divided into several sections:

- Invoices last 7 days by Line:** A bar chart showing the sum of total price for invoices from 11/19/2018 to 11/23/2018. The y-axis ranges from 0 to 35k. A callout box points to the chart with the text: "The Assistant alerts you to items assigned to you, or overdue and requiring action."
- Recent Records:** A list of recent records, including "Invoices last 7 days by Line" and "Metrolina Surgical Specialist (Monroe, NC)".
- Revenue Reports:** A list of revenue reports, including "Coronary Revenue Dashboard", "Peripheral Revenue Dashboard", and "Lead Management Revenue Dashboard".
- Assistant:** A section for the Assistant, which provides reminders about overdue tasks and opportunities.

At the bottom of the page, there is a Utility Bar with shortcuts for "Recent Contract Requests", "My Account Team's Accounts", and "Recent Items". A callout box points to this bar with the text: "Convenient shortcuts appear in this static Utility Bar at the bottom of the Salesforce window."

Getting Started: Page Layouts



Some basic tips for moving around on standard Salesforce pages, such as Accounts (shown here).

Use these tabs to access different areas of the current record.

Click any of the **Related List Quick Links** to go directly to that section of the page. Hover over a link to display a pop-up menu.

The screenshot shows a Salesforce Account record for 'Master Account'. At the top, there are tabs: 'Details', 'Account Team', 'Assets', 'Invoice', 'Chatter', and 'Contract Requests'. Below the tabs is a table with fields like 'Account Number', 'Account Type', 'Coronary Region', 'Peripheral Region', 'Lead Management Region', and 'Annual Revenue'. The 'Details' section is expanded, showing 'Account Information' with fields for 'Account Name', 'Parent Account', 'Sales Total YTD', and 'Sales Total LY'. Below that is 'Account Type Information' with fields for 'Type' and 'Hospital Type'. At the bottom is 'Site Phone and Fax Numbers'. On the right side, there are 'Related List Quick Links' for 'Account Team (3)', 'Invoices (2)', 'Laser Placement Forms (0)', 'Contacts (3)', 'Opportunities (1)', and 'Account History (1)'. Below that is a 'Contract Requests (3+)' list with links for 'CR Test Account', 'CR-20006-Master Account', and 'CR-20007-Master Account'. At the bottom right is a 'New Contract Request Flow' form with fields for 'Record Type', 'Assignment', 'Business Unit', and 'Lead Manager'. A red asterisk is next to the 'Record Type' field. A callout points to the 'Details' tab, another to the 'Contract Requests' quick link, and a third to the 'Record Type' field.

Click here to collapse any section to conserve screen space.

Underlined text indicates clickable links. *Right-click* to open them in a new tab or window.

Red asterisks indicate required fields.

A red indicator on this bell icon for *Notifications* alerts your when you are mentioned in an unread Chatter post, or have received an Approval request.

Click this star icon to add the currently viewed record to your personal list of **Favorites**, for quick access.

The screenshot shows the 'MY FAVORITES' sidebar in Salesforce. It contains a list of items: 'DELRAY MEDICAL CENTER Account', 'Imaging Center Q1 expansion Opportunity', and 'IGTD Hospital A Account'. There is a star icon at the top left of the sidebar and a red notification bell icon at the top right. A callout points to the star icon.

Account Management

Create a New Account



Prospect Account records for new potential clients



Business Process

One of the first things you should do on any new Prospect Account is to create multiple Contact records, indicating their Functional Roles.



Important

Before creating any new Account record, first search Salesforce to confirm that it doesn't already exist.



What's in it for Me?

By creating Contacts on these Accounts, your Account Team has visibility into who the players are at this prospective client, and the roles they play — even for clients where we haven't yet successfully done business.

Creating *Prospect Accounts* allows you to use Opportunities to track the sales engagement from the very earliest stages.

To create a new Prospect Account record: From the *Account* tab, click the **New** button, and enter information into the *New Account* dialog seen here.

New Account: IGTD - Prospect

Account Information

* Account Name

Parent Account

Philips MP1 Number

Account Number

REFERENCE: GPO On File

Website

REFERENCE: IDN on File

Has Laser?

AX ID

Oracle Account Number

Account Type Information

Type

Account Source

Hospital Type

Rating

LM Pricing Tier

Site Phone and Fax Numbers

Phone

Purchasing Fax

Fax

Address Information

Site Address

If this new *Prospect Account* will be associated to an existing *Master Account*, search in this field to create that relationship.

For a new potential client, you might not know all this information yet and will fill it in as discovery proceeds. As always, however, fields with a red asterisk are required.



The Account Record



Related Records and Account Navigation

Key related records on each Account include Contacts (as well as *Related* Contacts from other Accounts), Opportunities, Assets, Contract Requests, Pricing Terms, and Invoices.

Click to view this record's position in a hierarchy of related Accounts.

Non-Laser Assets for this Account with serial numbers, dates for purchase, installation, warranty and more

Follow a record to be notified about new posts on its Chatter feed, and updates to key fields.

The screenshot displays the account record for 'The Nebraska Medical Center'. The interface includes a header with account details, a navigation bar with tabs for 'Details', 'Account Team', 'Chatter', 'Assets', 'Invoice', and 'Contract Requests'. The 'Chatter' tab is active, showing a feed with callouts for posting updates and attaching files. The 'Assets' tab is also highlighted, with a callout explaining non-laser assets. A 'Following' button is visible in the top right, with a callout explaining its function. A 'Related List Quick Links' section on the right lists various record types like 'Account Team (10+)', 'Invoices (10+)', and 'Contacts (10+)'. A 'Contract Requests (3+)' section lists specific requests. A 'Log a Call' and 'New Task' section is at the bottom right, with a callout explaining predefined descriptions. A detailed view of the 'Account Type Info' section is shown at the bottom left, with a callout explaining that sections can be collapsed or expanded.

Account: **The Nebraska Medical Center**

Coronary Region: LM Region Lead, Peripheral Region North Central, Annual Revenue, Oracle Account Number 14029, Customer ID 720249

Details | Account Team | **Chatter** | Assets | Invoice | Contract Requests

Account Information

- Account Name: The Nebraska Medical Center
- Account Record Type: IGTD - Master Account
- Sales Total YTD: USD 189,353.94
- Sales Total LY: USD 331,542.18
- LM Revenue Last 12 Months
- Philips MP1 Number: 94222638
- Account Number

Account Type Info

- Territory Alignment
- Competitive IVUS OCT & FFR
- Market Share Data
- Cup Deals Tracking
- Stellarex Details
- SAP Loss of Business Impact
- IGTD - Sales Data
- Systems - IVUS Focus
- Peripheral - IGTD
- Lab Information (Cath Lab, IR / OR, etc)
 - # GE Rooms
 - # Philips Rooms
 - # Siemens Rooms
 - # GE Innova w/ Touchpad
 - # Interventional Cath Labs
 - # IR Labs

Related List Quick Links

- Account Team (10+)
- Invoices (10+)
- Laser Placement Forms (1)
- Contacts (10+)
- Cases (10+)
- Related Contacts (10+)

Contract Requests (3+)

- CR-21071-The Nebraska Medical Center
- CR-21077-The Nebraska Medical Center
- CR-16899-The Nebraska Medical Center

Log a Call | New Task

Recap your call... [Add]

Account Teams and Alignment



Visibility and Collaboration

The *Account Team* tab displays all reps and managers in all business units who work with this hospital or OBL. Review this when you need to collaborate with another Business Unit on this Account.

Details				Account Team	Assets	Invoice	Chatter	More
Account Team (6+)								
TEAM MEMBER	TEAM ROLE	TITLE						
Ashly Hafele	Clinical Consultant	Clinical Consultant	▼					
Chris Bohm	Coronary Zone Vice President	Coronary Zone Vice President	▼					
Greg Cook	Lead Management District Ma...	Vice President of LM Sales	▼					
Greg Snow	Lead Management Regional ...	LM Regional Sales Managers	▼					
Joe Kowalczyk	Peripheral Territory Manager	Peripheral Territory Manager	▼					



Business Process

To request that members be added to an Account Team, contact Sales Operations or your System Administrator via the Salesforce Support Request tab.

On existing Accounts, the *Territory Alignment* section of the Account Record summarizes the assigned zone, region, and internal roles for that client.

Territory Alignment	
Peripheral Zone Peripheral West	Coronary Zone
Peripheral Region North Central	Coronary Region
Peripheral Zone Vice President Scott Kater	Coronary Zone Vice President Chris Bohm
Peripheral Regional Sales Manager Mike Milliken	Coronary Regional Sales Manager Mike Kelderman
Peripheral Territory Manager Joe Kowalczyk	Coronary Territory Manager 1 John Lange
Peripheral Clinical Specialist	Coronary Territory Manager 2
	Coronary Clinical Specialist
	Field Service Engineer
Lead Management District Manager Greg Cook	Corporate Account Director
Lead Management Regional Manager Greg Snow	Coronary Area Manager Keri Allison
Lead Management Territory Manager John Bussey	
Lead Management Clinical Specialist	

Laser Placement Form



Submitting a Request for a New Laser Placement

This form represents a request for an Asset on the Account you are currently viewing.

Related List Quick Links ⓘ

- Account Team (10+)
- Invoices (10+)
- Laser Placement Forms (1)**
- Contacts (10+)
- Cases (5)
- Related Contacts (10+)

Show All (12)

1

Accounts > The Nebraska Medical Center
Laser Placement Forms

1 item • Updated a few seconds ago

NEW

	LASER PLACEMENT FORM NAME
1	Imaging Center - West Annex

2

Click on the “Laser Placement Forms” link in the “Related List Quick Links” section on the account.

Click the **New** button to create a new Laser Placement form for this Account.

New Laser Placement

Information

- *Laser Placement Form Name
- *Account Type: --None--
- *Hospital Name: ABINGTON MEMORIAL HOSPITAL

Sales Team

- *Sales Team: --None--
- Peripheral Territory Manager: Search People...
- Coronary Territory Manager: Search People...
- Lead Management Territory Manager: Search People...
- Coronary Account Manager: Search People...
- Strategic Account Manager: Search People...

System Shipping Address

- *Shipping Street
- *Shipping City

3

The Sales Team should be populated per the selected Business Unit. You will select the appropriate sales users according to your selection in the *Sales Team* field.

Account Types

Account Types and Hierarchies

In Salesforce, we use 3 types of Accounts. Each has a slightly different layout and are used for different purposes.

Master Account

A top-level Account – either the parent of one or more “child” Accounts, or a standalone Account with no child Accounts under it. This provides a more unified view of revenue and activity across all the related Accounts. As a Territory Manager, you will principally interact with Master Accounts. When Master Accounts are created, an Account Team is created and members are assigned to it. This alignment governs access to all records related to the Account.

Child Account

These have very basic layout (no related lists or buttons) and the Master Account they are related to appears in the Parent Account field.

Prospect Account

You create Prospect Accounts for brand-new clients who have never done business with us before. When the first order is received, a new account gets created for that entity in SAP or Oracle – which then feeds back in to Salesforce and is merged with your Prospect Account, retaining its Contacts, activities and Opportunity information to date.

The screenshot shows the 'Details' tab of an Account record. Under the 'Account Information' section, the 'Parent Account' field is highlighted with a red box and contains the text 'Master Account'.

On Child Accounts, this field indicates the Master Account they are related to.

The screenshot shows the 'Account Type Information' section. The 'Type' field is highlighted with a red box and contains the text 'Prospect'.

This field indicates whether the Account is a Master, Child, or Prospect.

Contact Management

Contacts – Create New



Create a Standard IGTD Contact

To create a new, direct Contact record on an Account:

1. Navigate to the appropriate Account record, then under *Related List Quick Links*, click **Contacts**.

DELRAY MEDICAL CENTER

Follow New Contract Request New Contact Edit

Details Account Team Assets More

Account Information

Account Name	DELRAY MEDICAL CENTER	Sales Total YTD	USD 0.00
Parent Account		Sales Total LY	USD 0.00

Related List Quick Links

- Account Team (2)
- Invoices (1)
- Laser Placement Forms (0)
- Contacts (0)**



Important

Before creating any new Contact (or Account) record, always use the Global Search Box first to confirm that it doesn't already exist in Salesforce.

2. On the Contacts page, click the **New** button.

Accounts > Master Account

Contacts

4 items • Sorted by Contact Name • Updated a few seconds ago

	CONTACT NAME	TITLE	EMAIL	PHONE
1	George Washington	President		
2	Test Contact 2			
3	Thomas Jefferson	Founder		1234567890
4	Thomas Nasir	Cardiologist		1234567890

3. Complete the required fields and all other information currently available, then click **Save**.

New Contact: IGTD - Standard Contact

Contact Information

* Name: Keri Allison (Contact Owner)

Salutation: Mr.

First Name: Jorge

* Last Name: Castillo

Title: VP, Purchasing

Department: Purchasing

* Functional Role: Executive Level Administrator

Reports To: Search Contacts...

Active:

Methods of Contact

Email: castillo.jorge@example.com

Phone: 1234567890

Mobile: 1234567890

Account Name: Master Account

Lead Source: Employee Referral

* Contact Currency: USD - U.S. Dollar

Buttons: Cancel Save & New Save

Address and telephone information is initially populated for you from corresponding fields on the Account record. Changing this on a specific Contact will not affect its parent Account record.



Business Process

Salesforce will attempt to alert you if this new Contact is a duplicate of an existing one. It especially looks for duplicates in the Contact name, email address and phone number fields.



Related Contacts – Accounts



Relate Contacts to Accounts, Assign Their Roles



Business Process

Salesforce allows us to define Roles for direct Contacts on an Account, in addition to Contacts on some *other* Account who play a role on this one. This provides insight into the network of influences around our client relationships.



Business Process

Multiple Roles can be assigned to the same Contact – for example, both an Evaluator and Decision Maker

This Contact is from a different Account.

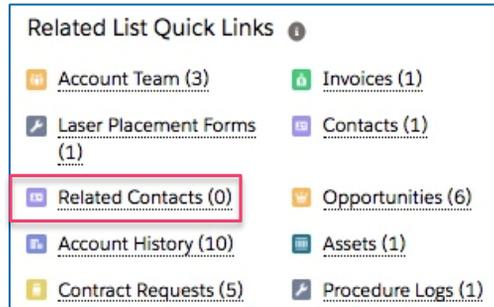


What's in it for Me?

Contacts also display a “Related Accounts” list. In addition to their direct parent Account, you easily see any *other* Accounts where they are an Influencer, for example.

To relate Contacts to an Account:

1. Navigate to the appropriate Account record
2. Under *Related List Quick Links*, click **Related Contacts**. A list of Contacts belong to, or related to this Account appears.



3. Click the **Add Relationship** button.

Accounts > Wheaton - St. Joseph Hospital
Related Contacts

37 items - Sorted by Title - Updated 2 minutes ago

	CONTACT N...	ACCOUNT NAME	TITLE ↓	EMAIL	PHONE	ROLES
1	Joseph Shalev	Wheaton - St. Joseph Ho...	MD			
2	Thomas Mahn	Wheaton - St. Joseph Ho...	MD	thomas.ma...	(414) 447-...	Influencer
3	Thomas Mahn	Wheaton - St. Joseph Ho...	MD	thomas.ma...	(414) 447-...	Other
4	Joseph Shalev	Wheaton - St. Joseph Ho...	MD			
5	Mary Ferrell	COVENANT MED CENTER	Manager, Cardiovascular ...	mary.ferrell...	(319) 272-...	Influencer
6	Paul Grebe	Wheaton - St. Joseph Ho...	Interventional Radiologists	grebepaul@...	(414) 771-...	Evaluator, Technical Buyer
7	Paul Grebe	Wheaton - St. Joseph Ho...	Interventional Radiologists	grebepaul@...	(414) 771-...	Evaluator
8	Frank Cummings	Wheaton - St. Joseph Ho...	Interventional Cardiologist		(414) 447-...	Technical Buyer
9	Frank Cummings	Wheaton - St. Joseph Ho...	Interventional Cardiologist		(414) 447-...	Evaluator
10	Lisa Fields	Wheaton - St. Joseph Ho...	Ed coordinator		(414) 447-...	Business User

4. Search for an existing Contact, then assign the Role(s) they play on the current Account.
5. Click **Save**.

New Account Contact Relationship

*Account: Wheaton - St. Joseph Hospital

Roles Available: Evaluator, Executive Sponsor, Technical Buyer, Other

Chosen: Influencer

*Contact: Mary Ferrell

Buttons: Cancel, Save & New, Save

Opportunity Management

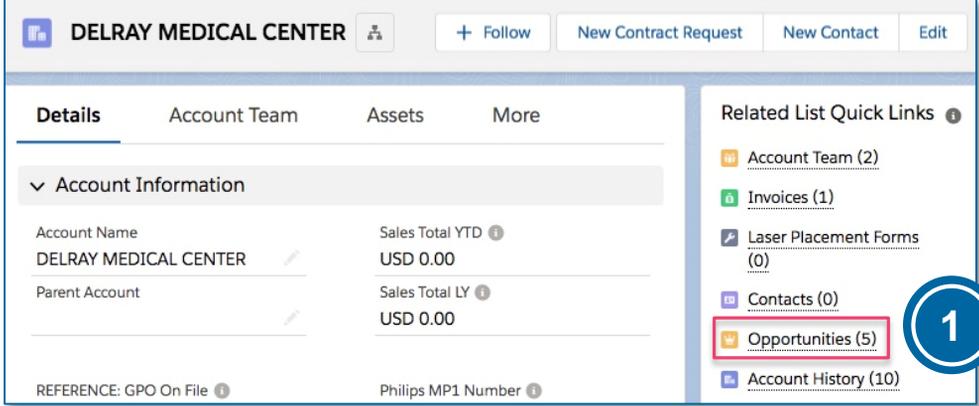
Workflow – New Opportunity (1)



Example: Create a New IGTD Disposable Sales Opportunity

To create a new Opportunity record:

1. Navigate to the appropriate Account record, then under *Related List Quick Links*, click **Opportunities**.



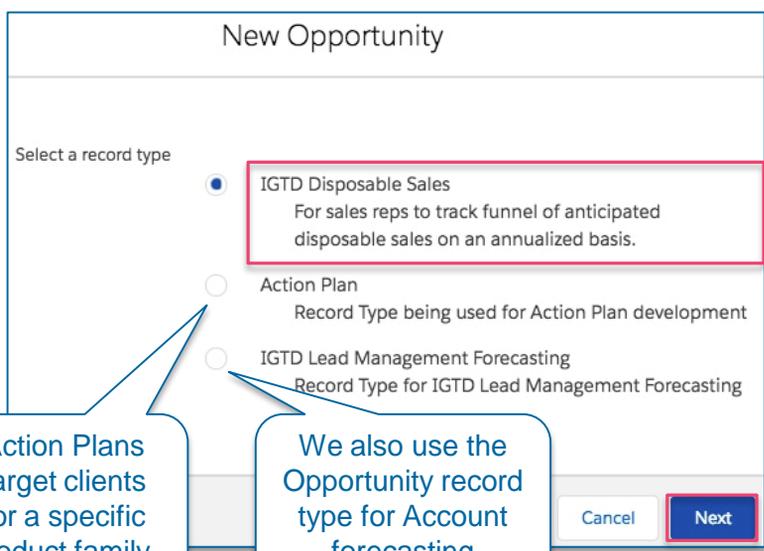
Important

Throughout the client engagement process, manually update the Stage on your Opportunity, log calls, assign Tasks to yourself or others, and use its Chatter feed to post updates.

2. Click the **New** button.



3. Select *IGTD Disposable Sales Opportunity* as the record type, then click **Next**.



TIP

Clicking on any Contact or Account name in a list opens that record. *Right-clicking* allows you to open it in a new tab or window, without leaving this Account record.

Workflow – New Opportunity (2)



Create a New IGTD Disposable Sales Opportunity

4. Enter as much information as currently available. Required fields are marked with a red asterisk.

The screenshot shows a Salesforce form titled "New Opportunity: IGTD Disposable Sales". The form is divided into several sections:

- Opportunity Information:** Contains fields for Opportunity Owner (Keri Allison), Amount (300,000.00), Opportunity Name (Imaging Center Q1 expansion), Close Date (1/31/2019), Account Name (DELRAY MEDICAL CENTER), Facility Type (Hospital), Disposable Deal Type (IVUS PV035), Opportunity Record Type (IGTD Disposable Sales), Next Step (onsite - requirements), Stage (Qualification), Probability (%) (25%), and Competition (--None--).
- Opportunity Goal/Summary Info:** Contains a text field for Notes / Solution Summary with the text "client to share site plan - number and locations for these units".
- Opportunity Status - Valid/Invalid:** Contains a dropdown menu for Opportunity Status set to "Valid".

Annotations and callouts:

- A blue circle with the number "4" is placed over the Opportunity Name field.
- A callout box points to the Close Date field, stating: "You will keep the Status, Amount and Close Date current over the lifetime of this Opportunity."
- A callout box points to the Stage dropdown, listing the stages for this type of Opportunity record: Qualification, Validation, Negotiation, (Closed Won), and (Closed Lost).
- A callout box points to the corner of the Notes / Solution Summary text field, stating: "Drag the corner to expand this text field."
- A callout box points to the Opportunity Status dropdown, stating: "Selecting Invalid status prevents this Opportunity from rolling up into the forecast."
- A blue circle with the number "5" is located in the bottom right corner of the form area.

At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save".

5. Click **Save** to finish creating the new Opportunity record on this Account.

Note: In Salesforce, Action Plans are one of the ways we use the Opportunity record type. They track introduction/expansion of certain product families at selected target Accounts, and have a unique page layout and Sales Path (Stages, Approval process, etc.).

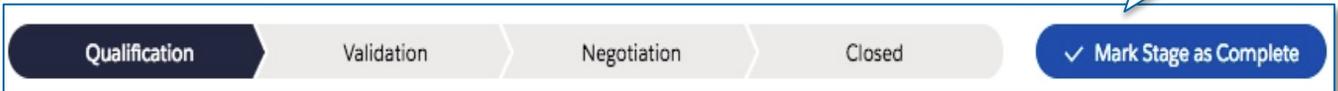
Opportunity Stages



Activities Across the Lifecycle of a Deal

A Path depicts the tracking stages we use to track the lifetime of an IGTD Disposable Sales Opportunity. It appears across the top of each Opportunity record.

Advances this Opportunity to the next stage.



STAGE	DESCRIPTION	ACTIVITY
Qualification	Information is being gathered about budget, decision maker and stakeholders, high-level requirements.	Identify primary and other contacts, decision maker for this deal.
Evaluation	Defining detailed requirements	Actively engaged with decision makers and key stakeholders, providing solution and service options.
Negotiation	Client has indicated a preferred solution and confirmed intention to move forward. Pricing, terms & conditions are under discussion	Quote/Proposal being prepared or has been submitted for approval.
Closed Won	PO received and order submitted for fulfillment.	Required to make a selection in the <i>Reason for Win</i> field. Enter details, insights into the <i>Post Mortem</i> field.
Closed Lost	Deal was lost, or is no longer valid.	Required to make a selection in the <i>Reason for Loss</i> field. Enter details, insights into the <i>Post Mortem</i> field.

Contract Requests, Pricing Terms & Approvals

Contract Request – Create New



Create a New Contract Request



Business Process

A Contract Request is requested pricing for a specific set of products on a particular Account.



Important

Before creating a new Contract Request, review existing ones to confirm whether that product family has already been addressed for this Account.

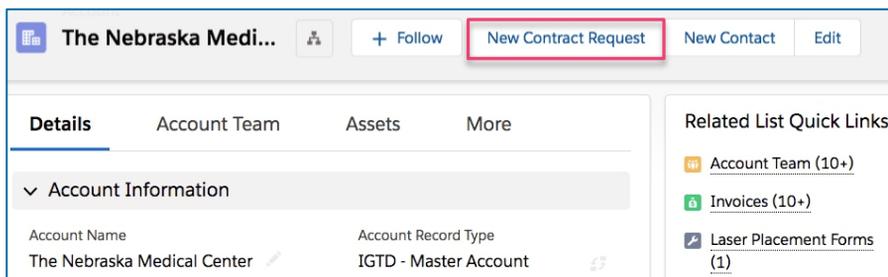


What's in it for Me?

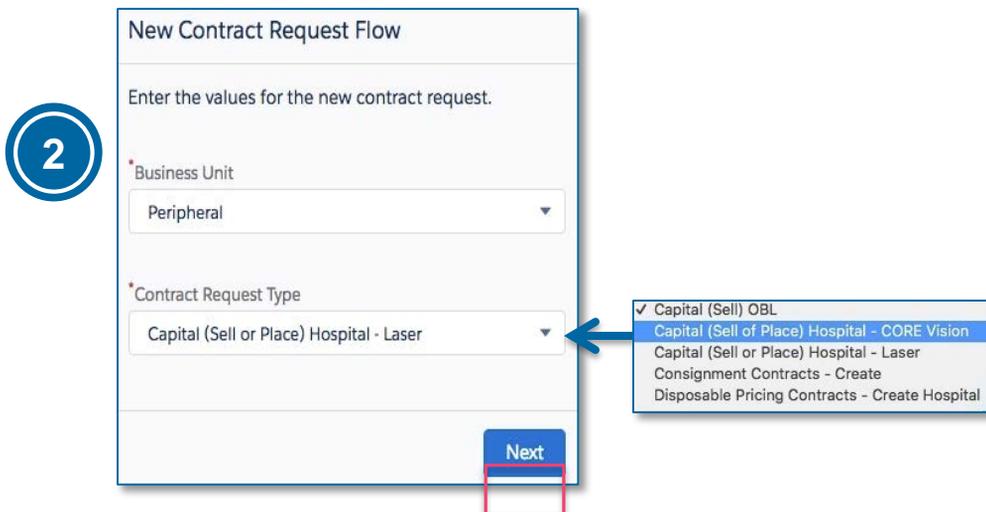
Salesforce provides a one-stop overview of all Contract Requests on each Account record.

To create a new Contract Request:

1. From the Account record, click the **New Contract Request** button.



2. In the next dialog, select the Business Unit (Lead Management, Coronary, Peripheral, Peripheral & Coronary, All Business Units) and Contract Request Type, then click **Next**.



3. Click the link in the next dialog to open your new Contract Request record for editing.



Contract Request – Edit



Edit the Contract Request



Business Process

When an active Contract is coming to an end, a new Contract Request must be submitted in order to renew it.



Important

A Contract Request must be submitted for every deal, regardless of pricing. Discount tiers for each business unit determine the required approvals. Certain minimal discount levels may be approved automatically.

The contents of the Contract Request record vary according to the Contract Request Type selected in the previous step. Seen here are the fields displayed for *Capital (Sell or Place) Hospital – Laser*.

Contract Request
CR-21071-The Nebraska Medical Center

Submit for Approval Clone Report for Export

Draft Pending Approved Rejected

Status: Draft

Approval History (0)

Details View Pricing Terms Set Pricing Terms

Information

IGT-D Rep Name
Keri Allison

Account
The Nebraska Medical Center

Contract Request Name
CR-21071-The Nebraska Medical Center

Business Unit
Peripheral

Purpose, Process, Payoff, Spec. Terms

REFERENCE: GPO On File

REFERENCE: IDN On File

Equipment Information (Laser)

Equipment Requested

Contract Information

Customer Contracting Contact

Customer Ship to Address

Approvers - Please enter the Manager and VP for the relevant product line

Peripheral Regional Sales Manager
Tim Karbonik

Peripheral Zone Vice President
Scott Kater

Coronary Regional Sales Manager

Coronary Zone Vice President

Salesforce tracks the approval stages for this Contract Request.

As with many other record type in Salesforce, you can collapse & expand sections of this layout as you work.

Your approvers are populated according to the Business Unit(s) selected in the previous step.



Business Process

On existing Accounts, Approvers are predefined. On new Prospect Accounts, you will assign the appropriate Approvers (Salesforce users) before submitting the Contract Request for approval.

Contract Request – Set Pricing Terms



Requested Product Pricing for a Contract Request



Business Process

For new Contracts, you must complete the Pricing Terms before submitting the Contract Request for approval.



Business Process

Depending on the requested pricing, this process may require approvals at Regional Sales Manager, Zone VP, or Pricing Council level.

(Pricing Council doesn't appear among Approver fields, but if applicable will appear in the Approval History.)

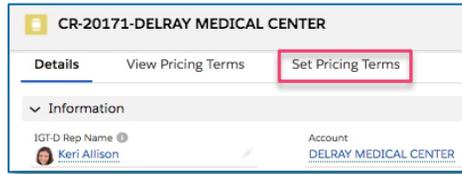


Business Process

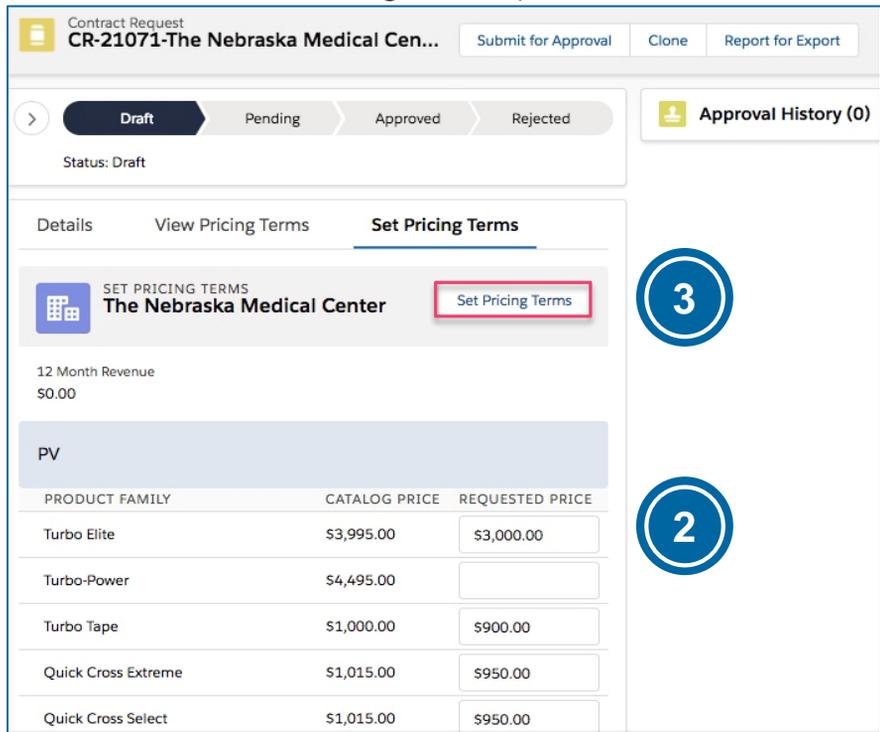
For *Consignment Contracts – Create*, you will also enter Par Levels when creating pricing.

Pricing terms are set for each Contract Request.

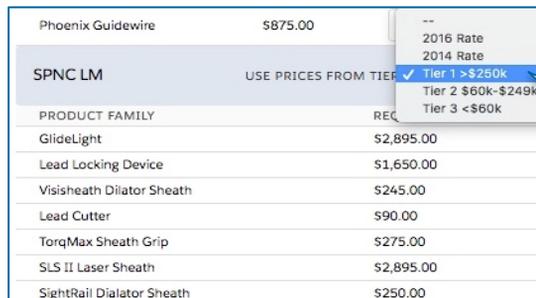
- From the Contract Request record, click the **Set Pricing Terms** tab.



- Enter the *Requested Price* for any product not to be sold at the Catalog Price (others can be left blank).



- Click the **Set Pricing Terms** button when finished.



Note: For SPNC LM products, select the appropriate revenue tier for this Account.

Contract Request – View Pricing Terms



Pricing Terms and Product Information

The **View Pricing Terms** tab displays the requested pricing and other information for each Contract Request on an Account.

1. Click the *View Pricing Terms* tab on the Contract Request record.

Contract Request
CR-21071-The Nebraska Medical Center

Submit for Approval Clone **Report for Export**

Draft **1** Pending Approved Rejected

Status: Draft

Approval History (0) **3**

Details **View Pricing Terms** Set Pricing Terms

Pricing Terms (6+)

PRODUCT NAME	PRODUCT DESCRIPTION	APPROVAL REQUIRED	REQUESTED PRICE
Peripheral Atherectomy	Turbo Elite 0.9mm Cathete...	RSM	USD 3,000.00
Peripheral Atherectomy	Turbo Elite 0.9mm Cathete...	RSM	USD 3,000.00
Peripheral Atherectomy	Turbo Elite 1.4mm Cathete...	RSM	USD 3,000.00
Peripheral Atherectomy	Turbo Elite 1.4mm Cathete...	RSM	USD 3,000.00
Peripheral Atherectomy	Turbo Elite 1.7mm Cathete...	RSM	USD 3,000.00
Peripheral Atherectomy	Turbo Elite 1.7mm Cathete...	RSM	USD 3,000.00

View All **2**

2. Click *View All* for more complete information (SKU, etc.) on these products.

	PRODUCT NAME	PRODUCT DESCRIPTION	APPROVAL REQUIRED	REQUEST...	SKU	PAR LEVEL	BUSINESS LINE	CATALOG...
1	Coronary Atherectomy	ELCA 2.0mm Catheter	ZVP	USD 2,495.00	120-009...		IGTD CV	USD 3,495.00
2	Coronary Atherectomy	ELCA 0.9mm X-80 Catheter	ZVP	USD 2,495.00	110-004		IGTD CV	USD 3,495.00
3	Coronary Atherectomy	ELCA 0.9mm Catheter X-80	ZVP	USD 2,495.00	110-002		IGTD CV	USD 3,495.00
4	Coronary Atherectomy	ELCA 1.4mm Catheter	ZVP	USD			CV	USD 3,495.00
5	Coronary Atherectomy	ELCA 1.7mm Catheter	ZVP	USD				USD 3,495.00
6	Coronary Atherectomy	ELCA 2.0mm Catheter	ZVP	USD				USD 3,495.00
7	Coronary Atherectomy	ELCA 0.9mm X-80 Catheter	ZVP	USD				USD 3,495.00
8	Coronary Atherectomy	ELCA 1.4mm Catheter	ZVP	USD				USD 3,495.00
9	Coronary Atherectomy	ELCA 0.9mm Catheter X-80	ZVP	USD				USD 3,495.00
10	Coronary Atherectomy	ELCA 1.7mm Catheter	ZVP	USD				USD 3,495.00
11	Peripheral Atherectomy	Turbo Elite 0.9mm Catheter ...	RSM	USD 3,000.00	410-152		IGTD PV	USD 3,995.00
12	Peripheral Atherectomy	Turbo Elite 0.9mm Catheter ...	RSM	USD 3,000.00	410-154		IGTD PV	USD 3,995.00
13	Peripheral Atherectomy	Turbo Elite 1.4mm Catheter ...	RSM	USD 3,000.00	414-151		IGTD PV	USD 3,995.00

The *Approval Required* column indicates what level of approval is required (e.g., RSM, ZVP).

3. (Optional) Click the **Report for Export** button to view Contract Requests and their Pricing Terms on this Account as a report. (See next page.)



TIP

Don't overlook the *Recent Contract Requests* link in the Utility Bar at the bottom of the Salesforce window.

Recent Contract Requests My Accounts Recent Items

Contract Requests – Submit for Approval



Submit a Contract Request for Approval

Once you have entered all the appropriate information on a Contract Request (including Pricing Terms) you are ready to submit for approval.



What's in it for Me?

The approval process for Contract Requests is handled in Salesforce, for improved accountability and traceability. Once you have configured all the data then click **Submit for Approval**, the record is locked. The *Approval History* related list on each Contract Request indicates date, time and names for when it was submitted; to whom it was assigned and the current status; then when it was approved and by whom.

Submit for Approval Clone Report for Export

Status: Draft

Approval History (0)

Details View Pricing Terms Set Pricing Terms

Information

IGT-D Rep Name	Status
Account	Draft
Wheaton - St. Joseph Hospital	Customer Account Number
Contract Request Name	6009
CR-21070-Wheaton - St. Joseph Hospital	Customer Type
Business Unit	Hospital
Peripheral & Coronary	
Purpose, Process, Payoff, Spec. Terms	
Special pricing on Stellarex	
REFERENCE: GPO On File	
REFERENCE: IDN On File	

Equipment Information (Laser)

Equipment Requested

Contract Information

Customer Contracting Contact

Customer Ship to Address

Approvers - Please enter the Manager and VP for the relevant product li...

Peripheral Regional Sales Manager	Coronary Regional Sales Manager
Mike Milliken	Jim Allison
Peripheral Zone Vice President	Coronary Zone Vice President
Scott Kater	Chris Bohm

The *Approval History* tracks status, submitters and approvers throughout the process.

The *Business Unit* selected here determines which Approvers are involved.

Notifications of pending approvals are sent to the users appearing here. If any required approver role for the selected Contract type is missing, an error dialog prevents you from completing the submission.

Submit for Approval

Comments

Jim, this is for the new tech introduction pricing we discussed last Friday with Bonnie. Please approve at earliest opportunity. If you have any questions, just post on the Chatter feed for this record. Thanks!

Cancel Submit

Use this expandable *Comments* field to provide additional context or background for the approver(s).



Contract Request – Approval Process



Our Approval Process



Business Process

System Administrators and other users with appropriate permissions can reassign approval to another individual.

Approval status (Pending, Approved, Rejected) from the various approvers appears here.

CR-21011-Wheaton - St. Joseph Hospital Clone Report for Export

Status: Pending

Approval History (2)

- Coronary RSM**
Date: 11/20/2018 1:15 PM
Status: Pending
Assigned To: Jim Allison
Actual Appr...: Jim Allison
Comments:
- Approval Request Submitted**
Date: 11/20/2018 1:15 PM
Status: Submitted
Assigned To: Keri Allison
Actual Appr...: Keri Allison
Comments: Here is the approval request for Wheaton, with the special OS upgrade pricing we discussed this morning. Thanks!

Items to Approve

- [CR-20171-DELRAY MEDICAL CENTER](#)
Contract Request · Submitted by Keri Allison
- [CR-20166-DELRAY MEDICAL CENTER](#)
Contract Request · Submitted by Joe Affronte
- [CR-20170-DELRAY MEDICAL CENTER](#)
Contract Request · Submitted by Keri Allison

Approvers see this *Items to Approve* list on their Home page.

When approvers click into the record, they can approve, reject, or reassign to another approver.

Approval Request
Contract Request Approval Pending

Approve Reject Reassign

Submitter	Date Submitted	Actual Approver	Assigned To
Keri Allison	Oct 28, 2018	Jim Allison	John Berringer

Approval Details

Contract Request Name	Owner
CR-20171-DELRAY MEDICAL CENTER	Keri Allison

Submitter Comments

Keri Allison
Please review and approve. This reflects the discussion we had with Bonnie last Friday. Any questions/comments, please indicate on the Chatter feed for this record. Thanks!
Oct 28, 2018 1:18:32 PM

Approve Contract Request

Comments

Looks good - thanks for pulling this deal together so quickly!

Cancel Approve

Approvers can add Comments when approving or rejecting requests.

Reports & Dashboards

Reports & Dashboards



Dashboards – Graphical Views of Various Reports

About Dashboards

As explained on the *Terminology* page, Dashboards in Salesforce are graphical representations of the data in their underlying reports.

- Some individual dashboard components can also appear on your Home page.
- Each component on a Dashboard represents data from a specific report.
- Click a Dashboard graphic to drill down into its source report.

DASHBOARD
Peripheral Revenue
As of Nov 23, 2018 7:59 AM-Viewing as BlueWolf Admin

Note: Click the **Refresh** button on a Dashboard to ensure you are viewing the most current data .

Refresh

Yesterday's Peripheral Revenue/Account

We can't draw this chart because there is no data.

Click this footer text to view the entire source report.

View Report (Yesterday's Peripheral Revenue/Account/...

MTD Peripheral Revenue/Account

Sum of Total Price (USD)

Account Name	Sum of Total Price (USD)
MA...	44k
BAY...	37k
FAV...	35k
Stro...	25k
Sou...	23k
UNL...	18k
PRE...	16k
Bolh...	15k
Torr...	14k
Joh...	13k
ARK...	13k
OUR...	13k

Account Name

View Report (MTD Peripheral Revenue/Account)

Sum of Total Price (USD)

Account Name	Sum of Total Price (USD)
TERR...	103k
BAY A...	100k
PRES...	96k
MOU...	88k
OUR ...	77k
VALL...	72k
MAN...	68k
BRYN...	68k
Coast...	65k
MARY...	62k
Med...	61k
JANE ...	58k

Account Name

View Report (QTD Peripheral Revenue/Account/...

Yesterday Peripheral Rev/Account/...

We can't draw this chart because there is no data.

Click a segment to view that record.

View Report (Yesterday Peripheral Rev/Account/Pro...

MTD Peripheral Rev/Account/Product

Sum of Total Price (USD)

Product Category	Sum of Total Price (USD)
MA...	44k
BAY...	37k
FAV...	35k
Stro...	25k

Product Category

Account Name

> ProductCat...

View Report (MTD Peripheral Rev/Account/Product)

Sum of Total Price (USD)

Product Category	Sum of Total Price (USD)
TERR...	103k
BAY A...	100k
PRES...	96k
MOU...	88k

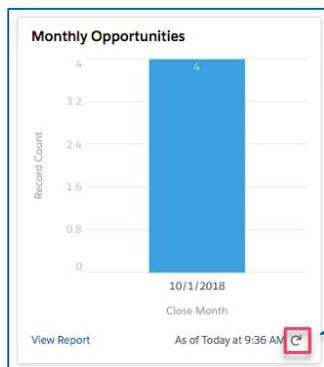
Product Category

Click this icon to see an expanded view of this dashboard component (and optionally download it as a graphic snapshot).



TIP

Many Dashboards (such as this one) can display additional data when you hover over a column, segment, slice of a donut chart, or an item in the legend.



Individual Dashboard components (e.g., on your Home page) also include this **Refresh** button.

Reports & Dashboards



Reports – Real-Time Data In Salesforce



Important

When using the *Save As* feature for your personalized version of a report, always store it in your *Personal Reports* folder.

For assistance sharing a report with other team members, contact your system administrator.



Business Process

The same report may display different data, depending on the access to Accounts, etc. that our security model in Salesforce provides.

About Reports

As explained on the *Terminology* page, Reports in Salesforce are **real-time summaries and analyses of your data**. They can be accessed via the *Reports* tab.

On the reports provided, you can change date ranges, reorder columns, add groupings, add or remove fields, then do a *Save As* for your customized version.

ACCOUNT NAME	INVOICE: INVOICE DETAIL NAME	TOTAL PRICE Sum
ABINGTON MEMORIAL HOSPITAL (3 records)	V2331042	USD 860.00
	V2331043	USD 860.00
	V2331166	USD 860.00
Subtotal		USD 2,580.00
ACCESS AND VASCULAR CARE, PLLC (2 records)	V2323555	USD 0.00
	V2323556	USD 500.00
Subtotal		USD 500.00
Aditya Verma, Inc. (CA) (2 records)	V2323557	USD 5,000.00
	V2323558	USD 5,000.00
Subtotal		USD 10,000.00
Advanced Cardiology Medical Associates (1 record)	V2324470	USD 39,950.00
Subtotal		USD 39,950.00
Adventist GlenOaks (2 records)	V2322467	USD 850.00
	V2331264	USD 750.00
Subtotal		USD 1,600.00
Adventist Health Sonora-CA (2 records)	V2327669	USD 1,350.00
	V2327670	USD 1,300.00

Invoices in this report have been grouped and subtotaled by Account Name.

Use this button to toggle display of a chart on a report.

Click to open the **Filters** pane, to restrict data displayed per date and time ranges, record ownership, etc.

My opportunities
My team's opportunities
✓ All opportunities

Done

Cancel Apply

Role Hierarchy
Opportunities with Account
Forecasts under role: CEO

Show Me
All opportunities

Close Date
All time

Switching to **Edit** mode allows you to reorder, add or remove columns, create summary groupings, etc.

Reports & Dashboards



Reports – Editing a Report

Editing an Existing Report

Clicking the **Edit** button on an existing report opens the Edit mode seen on this page.

- Drag column headers to change their order.
- There are two ways to group records by rows or columns:
 1. The dropdown menu next to each column header
 2. The *Groups* area in the in the left pane of this window.
- **Note:** Only a representative subset of data is displayed while editing (so record counts may be lower). To see full results, click the **Run** button.

Click to open the *Filters* pane – to restrict displayed data by record ownership, date ranges, locations, etc.

Each report can include one chart.

Previewing a limited number of records. Run the report to see everything.

Site	State/Province	Last Activity	Last Modified Date	Total Price	Account Owner	Account Name
Wisconsin (2)		-	11/12/2018	USD 835.00	BlueWolf Admin	Aurora St Lukes Sou
		-	11/12/2018	USD 0.00	BlueWolf Admin	Aurora St Lukes Sou
Subtotal				USD 835.00		
IA (18)		2/3/2016	11/6/2018	USD 4,750.00	Keri Allison	The Iowa Clinic
		2/3/2016	11/6/2018	USD 3,750.00	Keri Allison	The Iowa Clinic
			11/6/2018	USD 2,475.00	Keri Allison	The Iowa Clinic
			11/6/2018	USD 2,250.00	Keri Allison	The Iowa Clinic
			11/6/2018	USD 1,900.00	Keri Allison	The Iowa Clinic
			11/6/2018	USD 1,500.00	Keri Allison	The Iowa Clinic
			11/6/2018	USD 950.00	Keri Allison	The Iowa Clinic
		2/3/2016	11/6/2018	USD 950.00	Keri Allison	The Iowa Clinic
		2/3/2016	11/6/2018	USD 950.00	Keri Allison	The Iowa Clinic
			11/6/2018	USD 950.00	Keri Allison	The Iowa Clinic
						Iowa Clinic
						Iowa Clinic
						Iowa Clinic
		2/3/2016	11/6/2018	USD 825.00	Keri Allison	The Iowa Clinic
		2/3/2016	11/6/2018	USD 825.00	Keri Allison	The Iowa Clinic
		2/3/2016	11/6/2018	USD 825.00	Keri Allison	The Iowa Clinic

Rows in this report have been grouped (and subtotaled) by State/Province.

To add or remove columns from the report, drag items to or from the *Columns* area in the left pane of this window.

Row Counts Detail Rows Subtotals Grand Total Currency: USD

Appendix

Action Plan – Territory Managers (1)



Targeting Accounts for Sales Initiatives



Business Process

The primary use of Action Plans is to target one or more Accounts for a specific product category. We previously did this for Stellarex but it is now being expanded to all product categories.



Important

The layout and available fields on Action Plans are unique, as compared to IGTD Disposable Sales Opportunities.

In our Salesforce configuration, **Action Plans** for an Account are technically a type of Opportunity record – but not used for the same purpose as the “normal” Opportunity records we use to track the progress of a deal and forecast the revenue it will produce.

To create a new **Action Plan Opportunity** record:

1. Navigate to the appropriate Account record, then under *Related List Quick Links*, click **Opportunities**.
2. Click the **New** button.
3. Select **Action Plan** as the Opportunity record type, then click **Next**.
4. The New Opportunity – Action Plan dialog appears. Fill out required fields and other available information, then click **Save**.

Select the product category/product to convert for this Action Plan.

Stages defined for the lifecycle of an *Action Plan Opportunity* are different than *IGTD Disposable Sales Opportunities*.



Action Plan – Territory Managers (2)



Action Plan Record Layout

The Action Plan (a kind of Opportunity Record in Salesforce) is where you track progress and activities, post updates and files, and update information about this product category sales initiative.

As with most records in Salesforce, you can Follow this Action Plan. Updates to key fields on records you are following appear in your personal Chatter feed.

The screenshot shows a Salesforce record for an Opportunity named "Wheaton St. Joseph Hosp Action Plan Stellarex". The record is in the "Validation" stage of a process that includes "Validation", "Negotiation", and "Closed". A "+ Follow" button is highlighted in a red box. The record details include:

Account Name	Close Date	Amount	Facility Type	Disposable Deal Type	Opportunity Owner
Wheaton - St. Joseph Hospital	6/28/2019				Keri Allison

The record is currently in the "Validation" stage. A "Mark Stage as Complete" button is visible. The record details are as follows:

Details	Related	Chatter
Account Name ⁱ Wheaton - St. Joseph Hospital		Probability (%) ⁱ 50%
Forecasting Product Category Stellarex		
On Track <input type="checkbox"/>		RSD Notes
Expected First Month of Result January		Notes
Contact/Operator Jennifer Nagel		
Next Activity		
Target Date 6/28/2019		
Planned Revenue ⁱ USD 75,000.00		
VAC Stage Identifying Champion		
Opportunity Name ⁱ Wheaton St. Joseph Hosp Action		

On the right side, there is a "Contact Roles (0)" section with filters for "All time", "All activities", and "All types". Below this, there are sections for "Next Steps" (with a "More Steps" button) and "Past Activities" (with a "Load More Past Activities" button).

Managing Action Plans – RSM/ZVP (1)



Targeting Accounts and Product Categories for Growth

Regional Sales Managers and Zone Vice Presidents are provided the *Action Plans* tab in Salesforce to view what is being created and pursued by their teams.

The screenshot on this page shows how ZVPs' view their RSMs and respective Territory Managers action plans.

Use this *Products to Convert* picklist to narrow the results displayed.

- ✓ All Forecasting Product Categories
- AS-CV
- AS-PV
- ATK
- BTK
- Coronary Ath
- Crossing
- LLE**
- MT
- MISC
- Stellarex
- Volcano
- Drug Delivery

IGTD Sales - North... Home Accounts Contract Requests Contacts **Action Plans** More

Action Plans
Scott Kater

Toggle Action Plan Stage
 VAC Stage Standard Stage

Product to Convert
All Forecasting Product Categories

Category	Value
Total On Track Accounts	42
Total Off Track Accounts	24
Total VAC Approved Accounts	18
Total Planned Revenue	\$1,682,860.00
Total Actual Revenue	\$0.00

Your Reporting Regional Sales Managers

- Mike Milliken
- Brett Ehler
- Tim Karbonik
- Keith Irby

Open Peripheral Regional Sales Manager - Southwest

- Jonathan Ice

Action Plans per Territory Manager

Territory Manager	Action Plans
Mike Milliken	7
Brett Ehler	15
Tim Karbonik	17
Keith Irby	12
Jonathan Ice	14

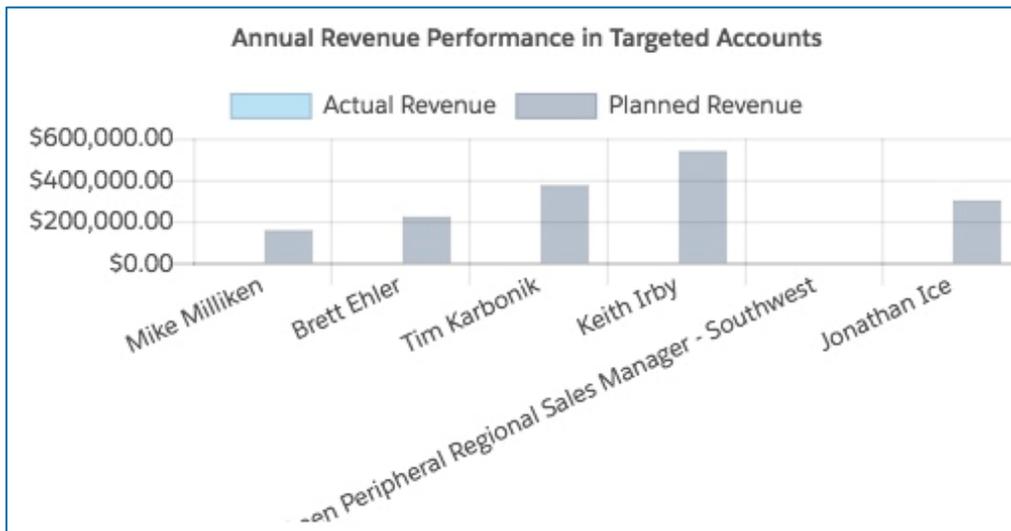
ZVPs can click on RSM names to see their Action Plan summary pages.

Managing Action Plans – RSM/ZVP (2)



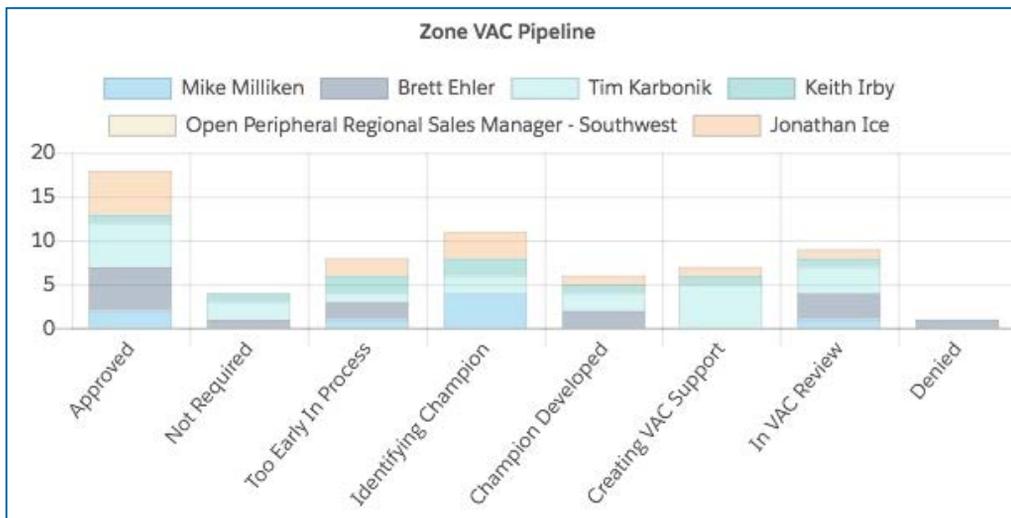
Targeting Accounts and Product Categories for Growth

Two additional charts on your Action Plans page provide additional breakdowns.



TIP

Hover over these columns and segments to view details.



Managing Action Plans – RSM View



Targeting Accounts and Product Categories for Growth

At the Regional Sales Manager level Action Plans are broken out by Territory Manager, with their Status, Planned vs. Actual Revenue and other detailed information. In this view, Action Plans are displayed for each Territory Manager who rolls up to that Regional Sales Manager.

Click to switch between displaying VAC Stages and our standard Salesforce stages for these Action Plans.

Action Plans
Brett Ehler

Toggle Action Plan Stage
 VAC Stage Standard Stage

Product to Convert
All Forecasting Product Categories

Total Planned Revenue: \$225,050.00
Total Actual Revenue: \$0.00

Blake Horrocks

ACCOUNT NAME	ACTUAL REVENUE	PLANNED REVENUE	PROBABILITY (%)	AGE (DAYS)	LAST MODIFIED DATE	ACCOUNT STATUS	STANDARD STAGE	PROGRESS
ST. MARK'S HOSPITAL		\$9,000.00	50%	10	Nov 04, 2018	On Track	Targeting	<div style="width: 50%;"></div>
INTERMOUNTAIN MED CTR		\$5,500.00	50%	10	Nov 04, 2018	Off Track	Targeting	<div style="width: 50%;"></div>
SALT LAKE REGIONAL MEDICAL						On Track	Targeting	<div style="width: 50%;"></div>

Fred Sundin

ACCOUNT NAME	ACTUAL REVENUE	PLANNED REVENUE	PROBABILITY (%)	AGE (DAYS)	LAST MODIFIED DATE	ACCOUNT STATUS	STANDARD STAGE	PROGRESS
St. Joseph Hospital		\$18,000.00	90%	10	Nov 04, 2018	On Track	Targeting	<div style="width: 90%;"></div>
Yakima Valley Memorial Hospital		\$10,000.00	90%	9	Nov 05, 2018	On Track	Targeting	<div style="width: 90%;"></div>
Yakima Regional Medical Center		\$10,000.00	90%	9	Nov 05, 2018	On Track	Targeting	<div style="width: 90%;"></div>

Anthony Paszkeicz

ACCOUNT NAME	ACTUAL REVENUE	PLANNED REVENUE	PROBABILITY (%)	AGE (DAYS)	LAST MODIFIED DATE	ACCOUNT STATUS	STANDARD STAGE	PROGRESS
Overlake Hospital Medical Center		\$30,000.00	90%	10	Nov 04, 2018	On Track	Targeting	<div style="width: 90%;"></div>
Providence Regional Medical Center, Everett		\$17,550.00	90%	10	Nov 04, 2018	On Track	Targeting	<div style="width: 90%;"></div>
Alaska Native Medical Center		\$15,000.00	10%	9	Nov 05, 2018	Off Track	Targeting	<div style="width: 10%;"></div>

Click on the Account Status field to see key details and the Territory Manager's notes for that Action Plan.

Click an Account Name field to view more details about that Action Plan record.

Procedure Logs



(Lead Management Users Only)

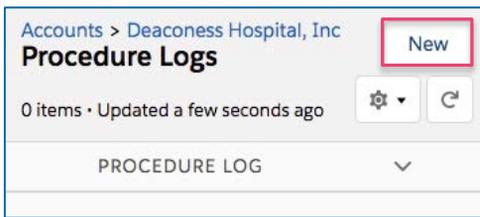
To create a new Procedure Log:

1. Navigate to the appropriate Account record. In the *Related List Quick Links*, click **Procedure Logs**.
2. Click the **New** button on the *Procedure Logs* page. (Any existing logs related to this Account will already appear here.)

1



2



3. In the first *Physician* field (which is required), search for the appropriate Contact record in Salesforce.
4. Fill out the rest of the available information, then click **Save**.



Important

Procedure Logs are only visible to users with Lead Management profiles. The *Procedure Logs* related list appears on any Account records where Lead Management products have been sold – and also on the Contact records for physicians who are referenced in any Procedure Log.

The screenshot shows the 'New Procedure Log: LM Procedure Log' form. It is divided into sections: Information, Physician, and Patient Information. The 'Physician' section is highlighted with a red box and a circled '3'. A callout bubble points to the 'Physician' field, stating: 'This Procedure Log will also appear on the Contact records for the physicians you enter here.' The 'Save' button is highlighted with a red box and a circled '4'.

Information

Procedure Log

*Case Date
12/17/2018

Owner
John Arvanitis

Originally Entered By

*Physician
(Philips) Aaron Brown

Physician (Text)

Referring Physician

Physicians Hospital
Deaconess Hospital, Inc

Physician 2

Physician 2 (Text)

Physician 2 Hospital

Case Qtr
4

Current Qtr
4

Patient Information

Gender
Male

Age
57

*Extraction Category

*Advisory Lead

Cancel Save & New Save