IGT-D Playbook for Salesforce

Revised 2.24.2020

PHILIPS

Getting Started

Getting Started – Help & Support

Who to Contact for Help

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

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

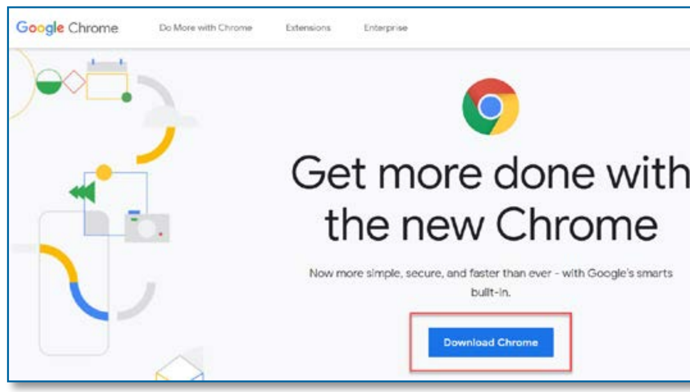
Google Chrome

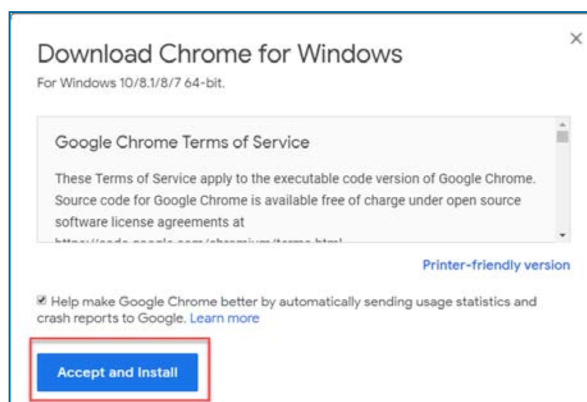
PLEASE NOTE:

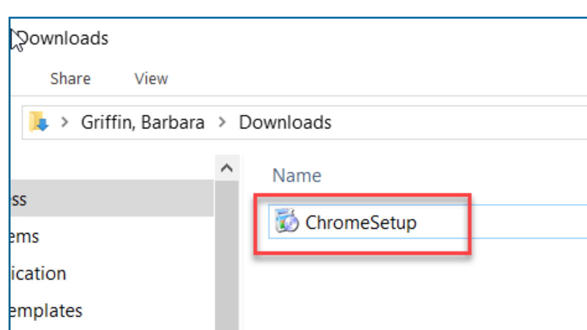
Note: It is strongly recommended that you do not use Internet Explorer with Salesforce as it has significant performance issues in Lightning Experience. <u>The preferred browser to use Salesforce with no limitations is Google Chrome.</u>

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

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 *Customer* Accounts are integrated with our SAP and Oracle back-office systems, you can also create new *Prospect* Accounts. 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 *Tasks* to ourselves or others, and to *Log Calls* that capture customer interactions directly on the related records.
Report	Reports are *real-time* 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 *graphical representation* 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).

Business Process

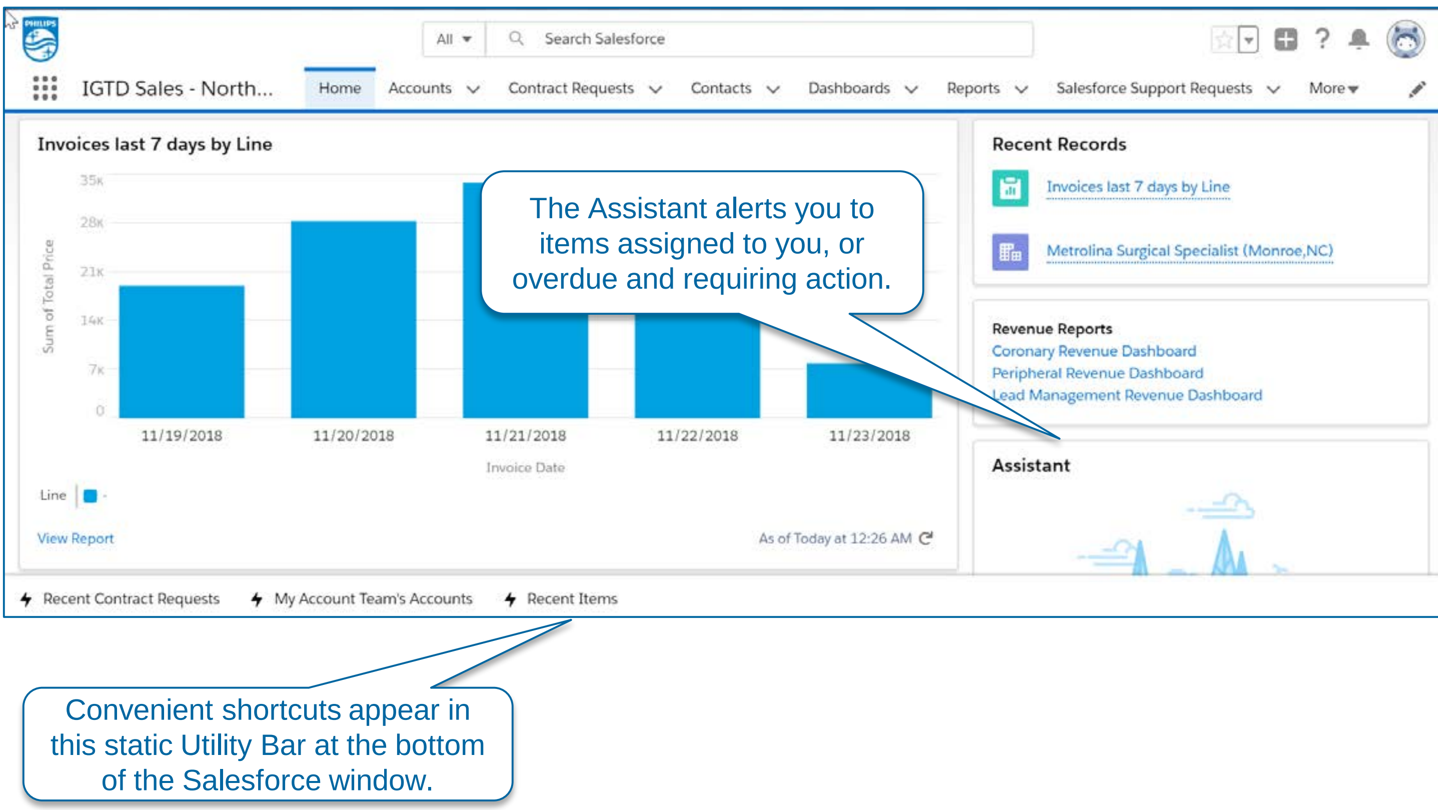
Information entered into Opportunity records flows up into the pipeline. Therefore, it is expected that you keep the *Close Date* and *Stage*, fields on each Opportunity up-to-date—starting from the *earliest* stages of the sales process.

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.

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.

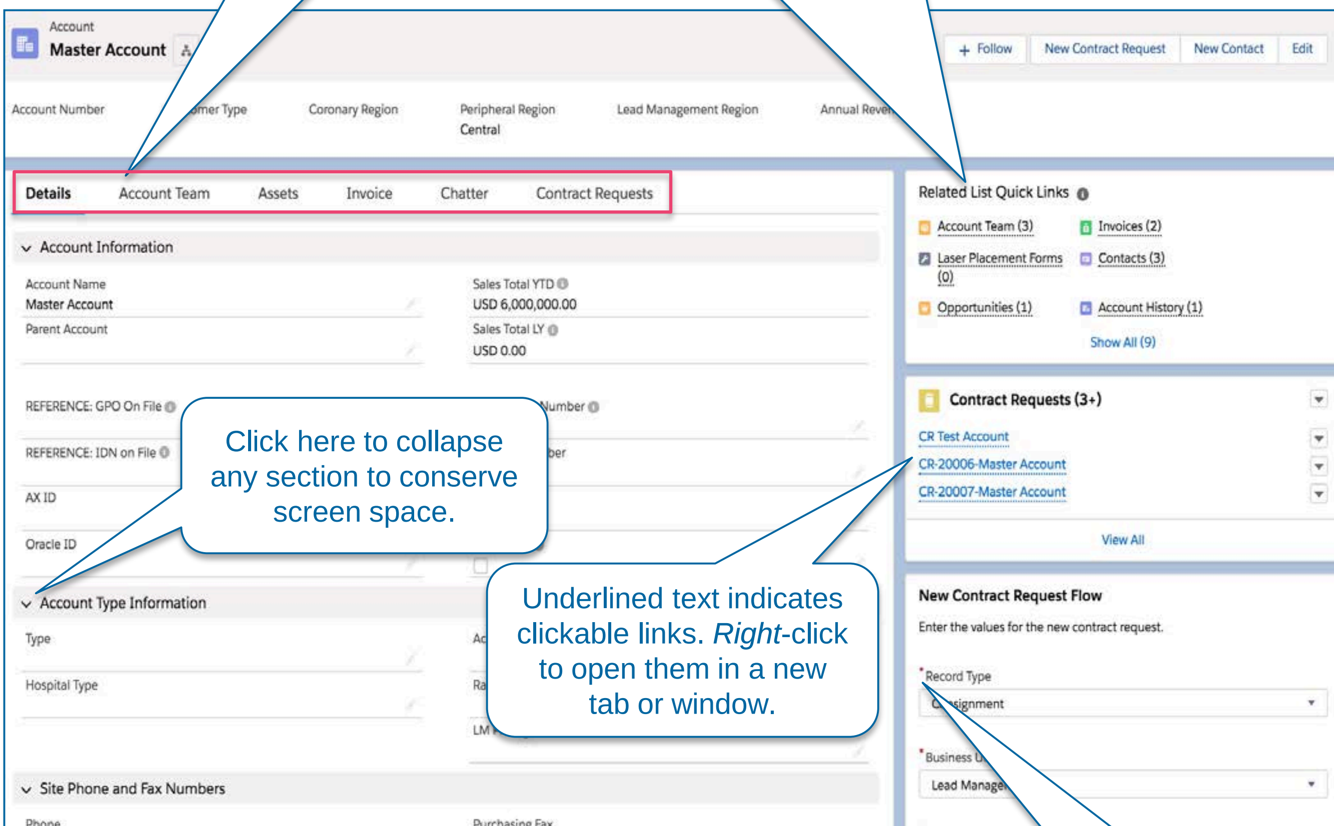


Getting Started: Page Layouts

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.

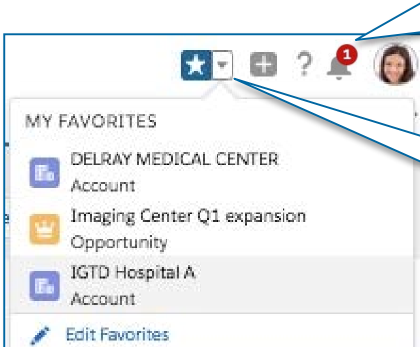


Click here to collapse any section to conserve screen space.

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.

PHILIPS

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.

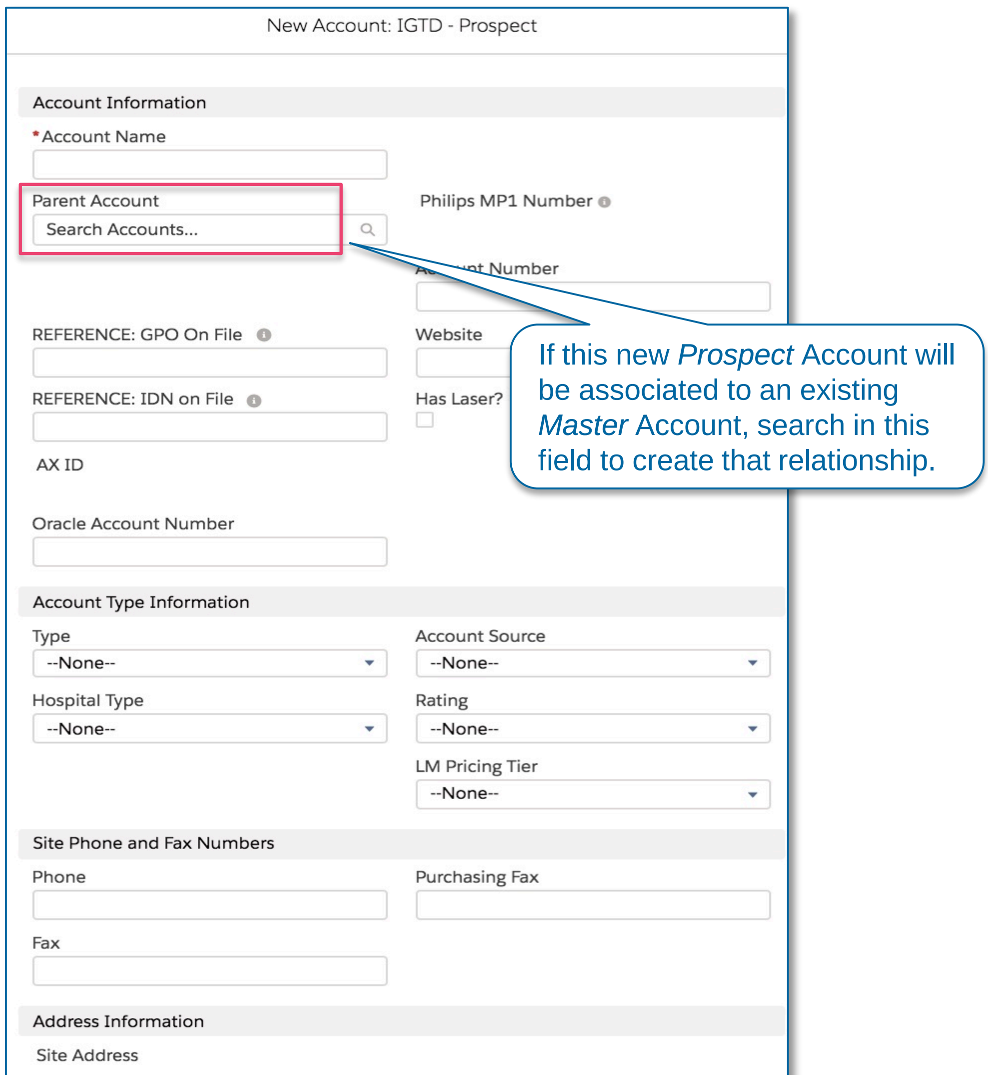
What's in it for Me?

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.



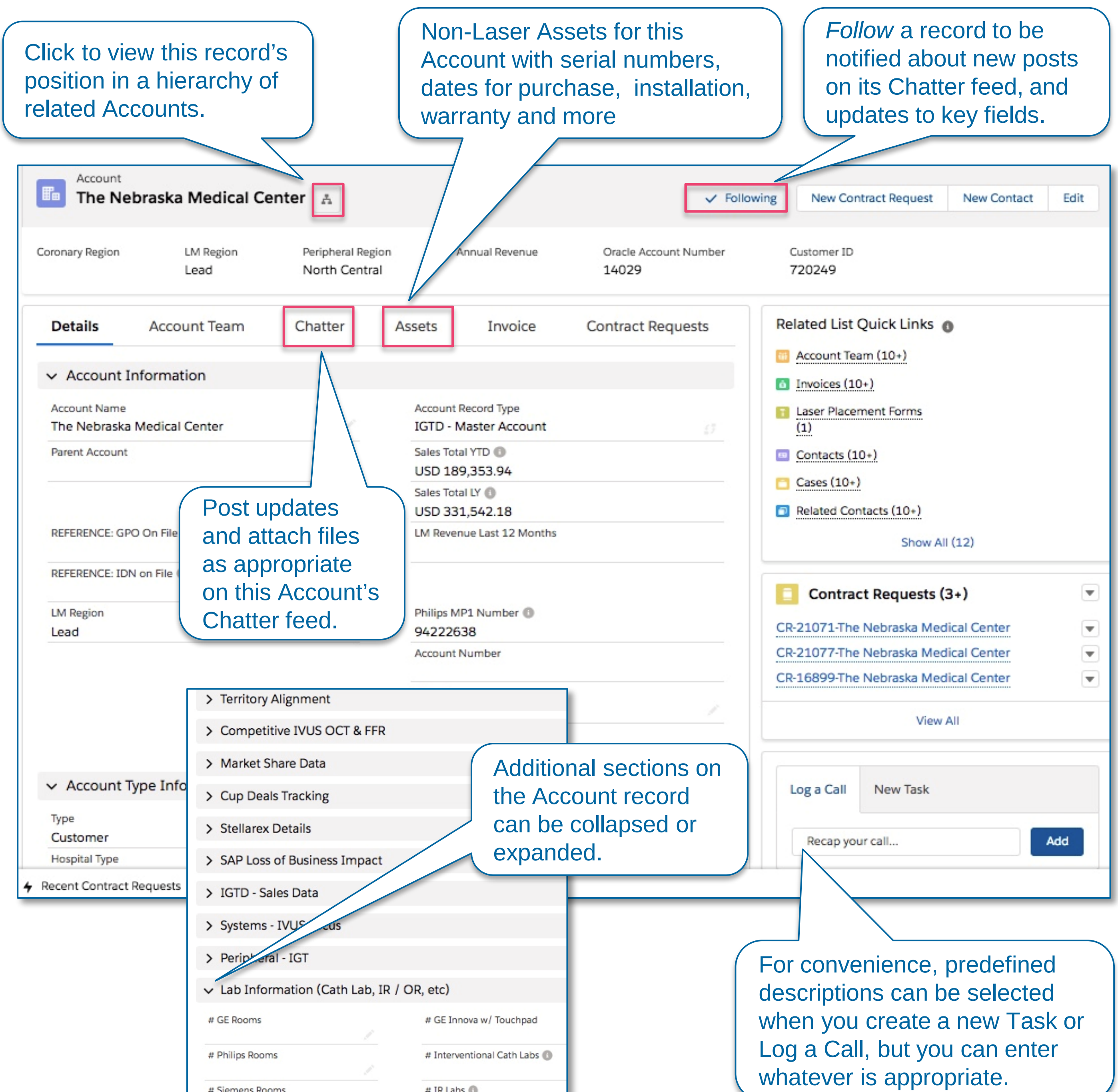
For a new potential client, you might not know all this information yet and will fill it in as discovery proceeds. As always, however, fields with a red asterisk are required.

PHILIPS

The Account Record

Related Records and Account Navigation

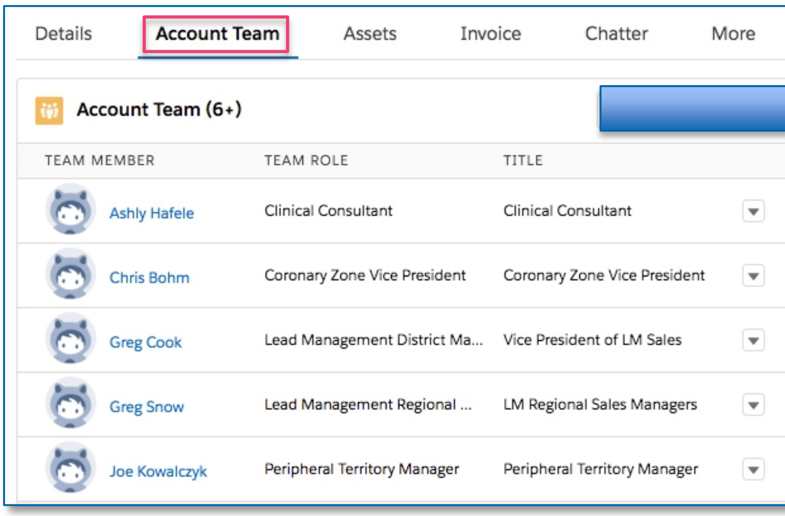
Key related records on each Account include Contacts (as well as *Related* Contacts from other Accounts), Opportunities, Assets, Contract Requests, Pricing Terms, and Invoices.



Account Teams and Alignment

Visibility and Collaboration

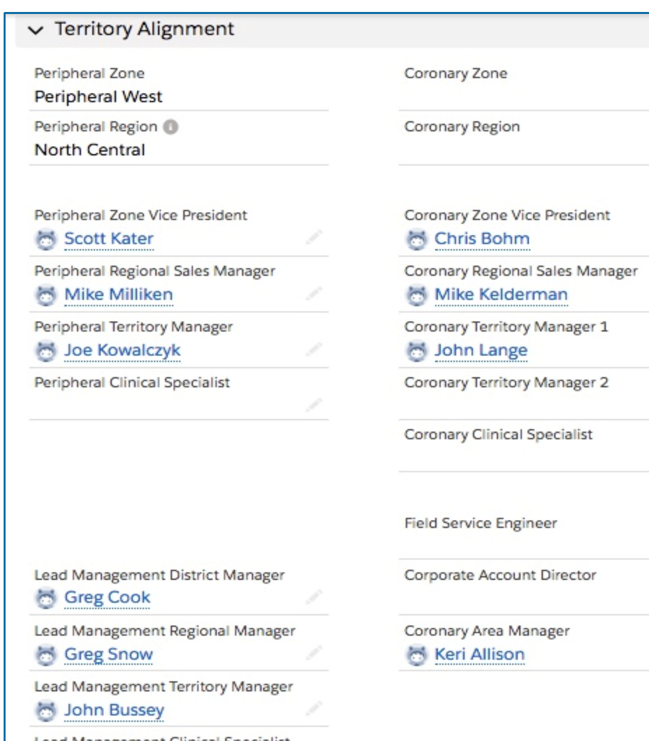
The *Account Team* tab displays all reps and managers in all business units who work with this hospital or OBL. Review this when you need to collaborate with another Business Unit on this Account.



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.

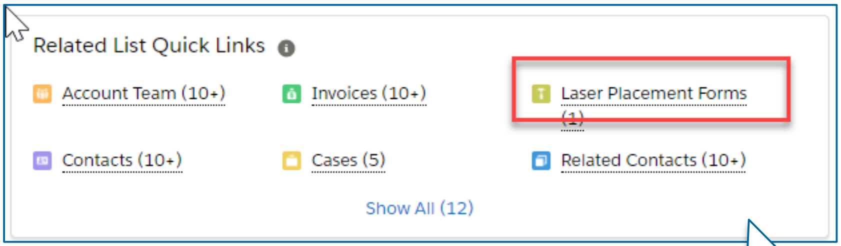
On existing Accounts, the *Territory Alignment* section of the Account Record summarizes the assigned zone, region, and internal roles for that client.



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.

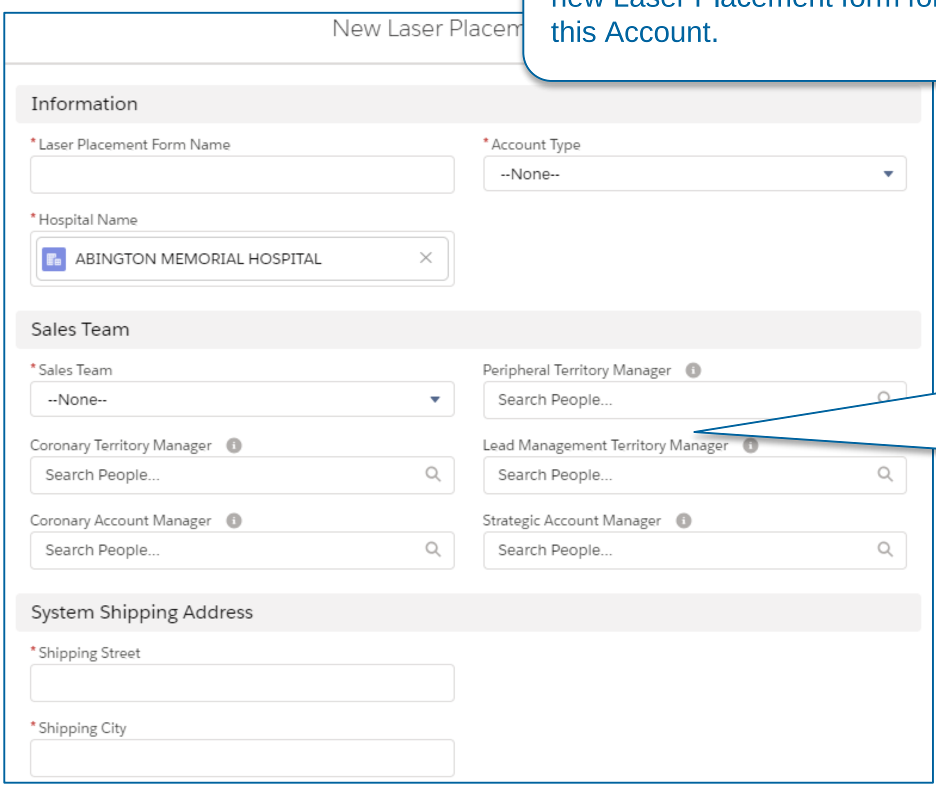


1

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

2

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



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

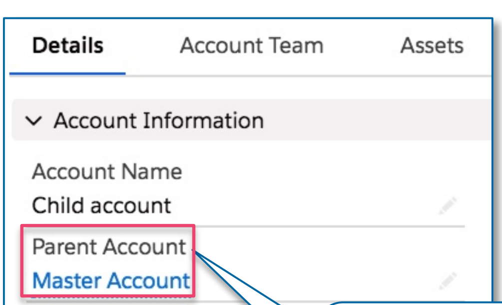
A top-level Account – either the parent of one or more “child” Accounts, or a standalone Account with no child Accounts under it. This provides a more unified view of revenue and activity across all the related Accounts. As a Territory Manager, you will principally interact with Master Accounts. When 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

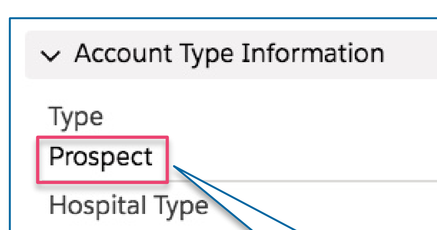
These have very basic layout (no related lists or buttons) and the Master Account they are related to appears in the Parent Account field.

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.



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



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

PHILIPS

Contact Management

Contacts – Create New

Create a Standard IGTD Contact

Important

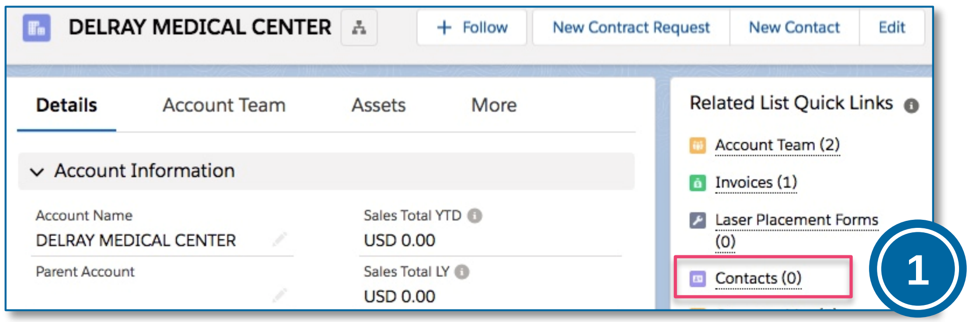
Before creating any new Contact (or Account) record, always use the Global Search Box first to confirm that it doesn't already exist in Salesforce.

Business Process

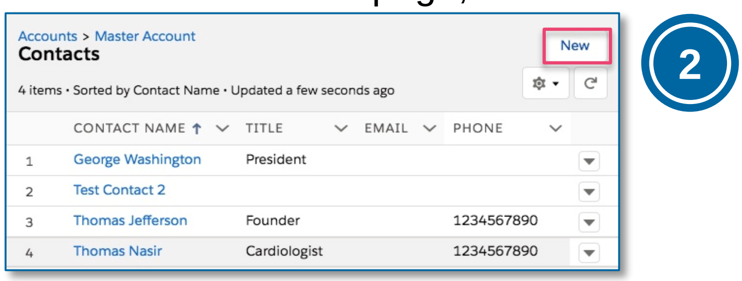
Salesforce will attempt to alert you if this new Contact is a duplicate of an existing one. It especially looks for duplicates in the Contact name, email address and phone number fields.

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

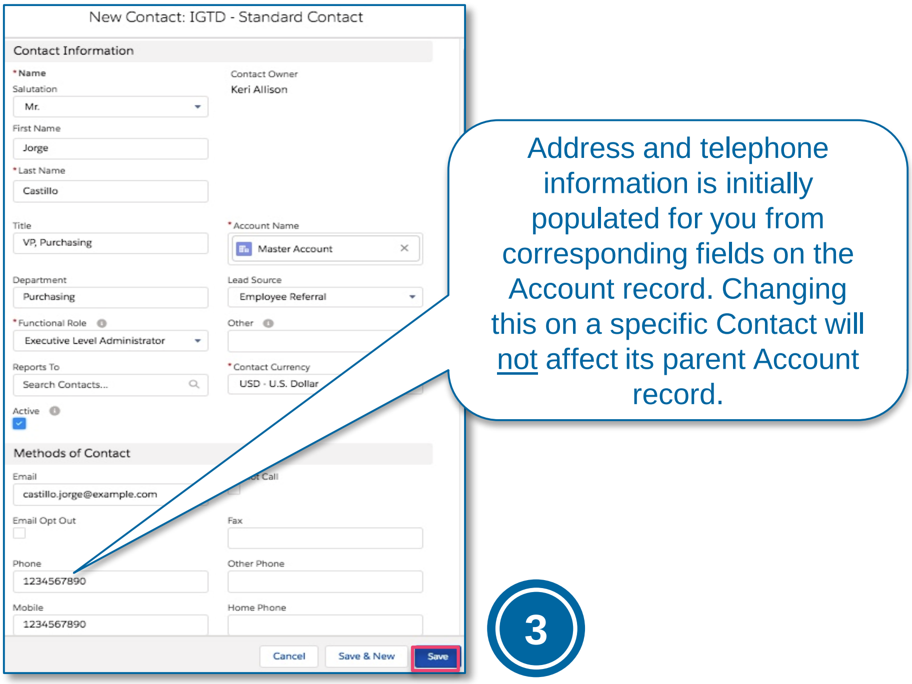
1. Navigate to the appropriate Account record, then under *Related List Quick Links*, click **Contacts**.



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



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



PHILIPS

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

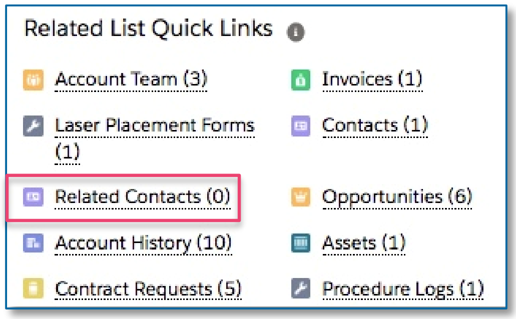
This Contact is from a different Account.

What's in it for Me?

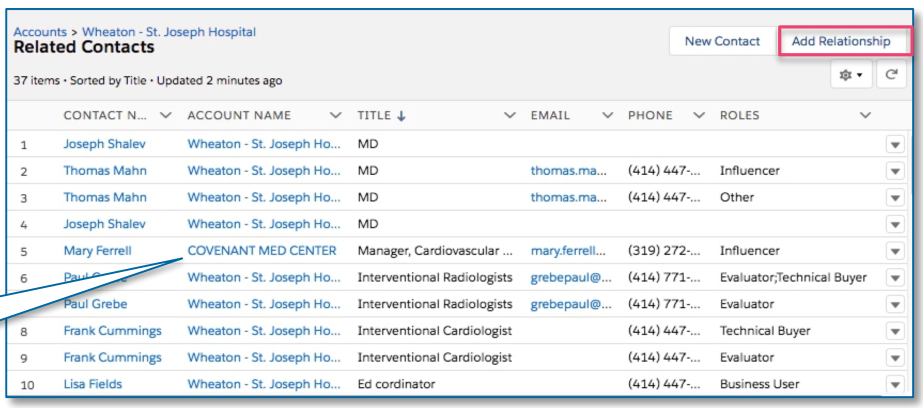
Contacts also display a "Related Accounts" list. In addition to their direct parent Account, you easily see any *other* Accounts where they are an Influencer, for example.

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.

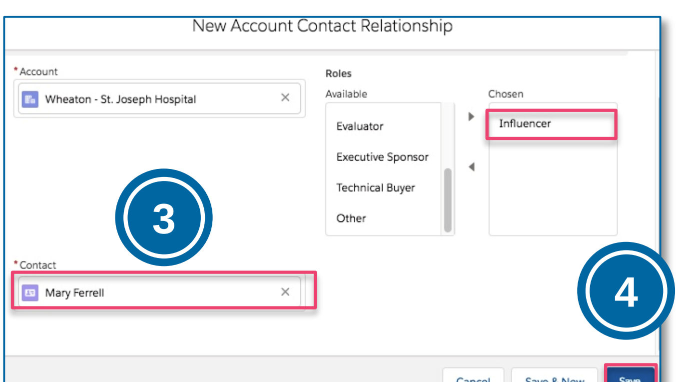


3. Click the **Add Relationship** button.



	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 [illegible]	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 cordinator		(414) 447-...	Business User

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



PHILIPS

Opportunity Management

Workflow – New Opportunity (1)

Example: Create a New IGTD Disposable Sales Opportunity

Important

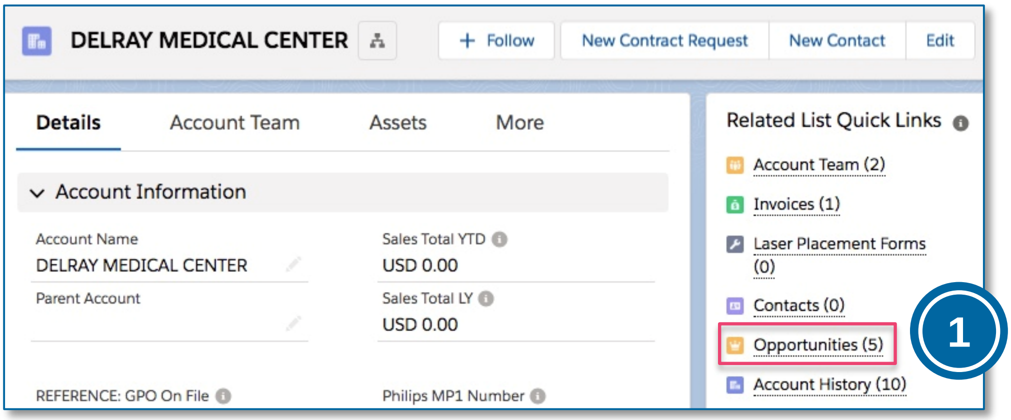
Throughout the client engagement process, manually update the Stage on your Opportunity, log calls, assign Tasks to yourself or others, and use its Chatter feed to post updates.

TIP

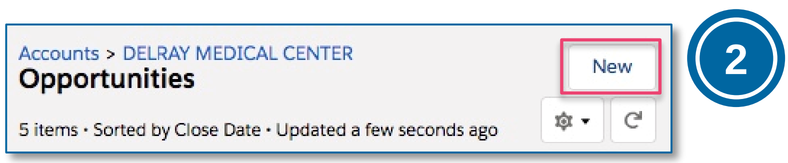
Clicking on any Contact or Account name in a list opens that record. *Right-clicking* allows you to open it in a new tab or window, without leaving this Account record.

To create a new Opportunity record:

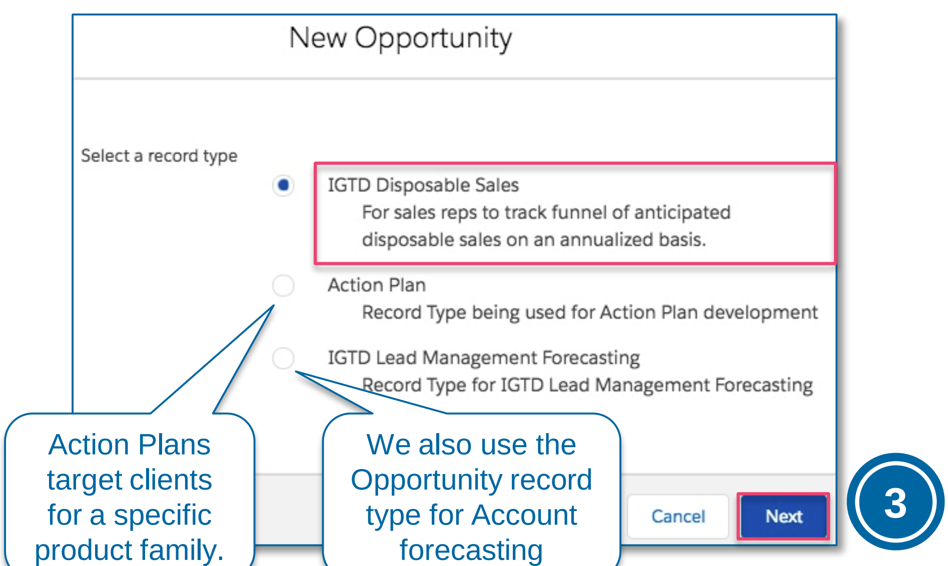
1. Navigate to the appropriate Account record, then under *Related List Quick Links*, click **Opportunities**.



2. Click the **New** button.



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

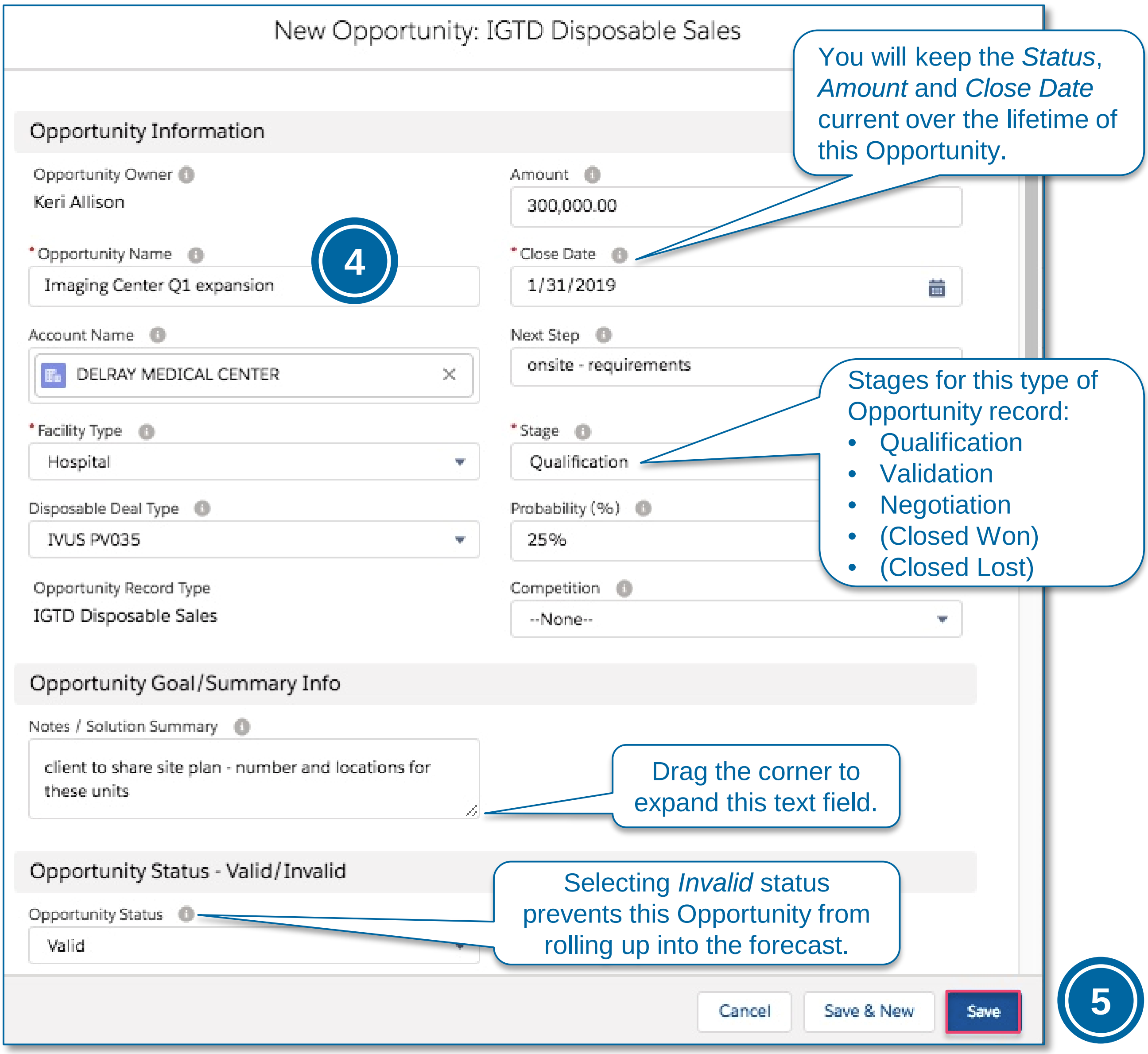


PHILIPS

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.



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

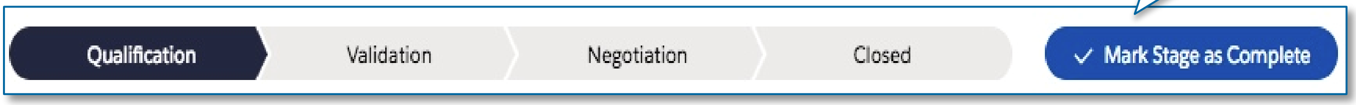
Note: In Salesforce, Action Plans are one of the ways we use the Opportunity record type. They track introduction/expansion of certain product families at selected target Accounts, and have a unique page layout and Sales Path (Stages, Approval process, etc.).

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 *Reason for Win* field. Enter details, insights into the *Post Mortem* field.
Closed Lost	Deal was lost, or is no longer valid.	Required to make a selection in the *Reason for Loss* field. Enter details, insights into the *Post Mortem* 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

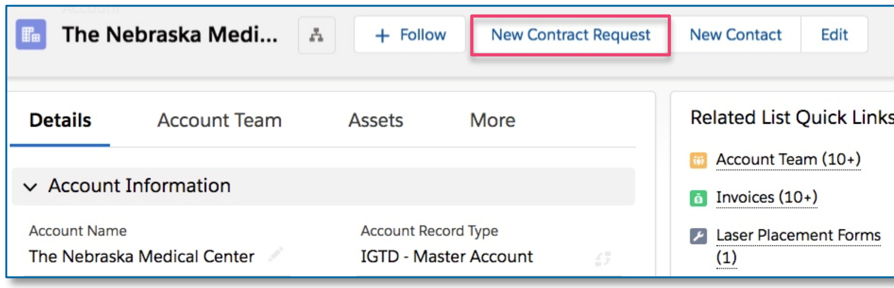
Before creating a new Contract Request, review existing ones to confirm whether that product family has already been addressed for this Account.

What's in it for Me?

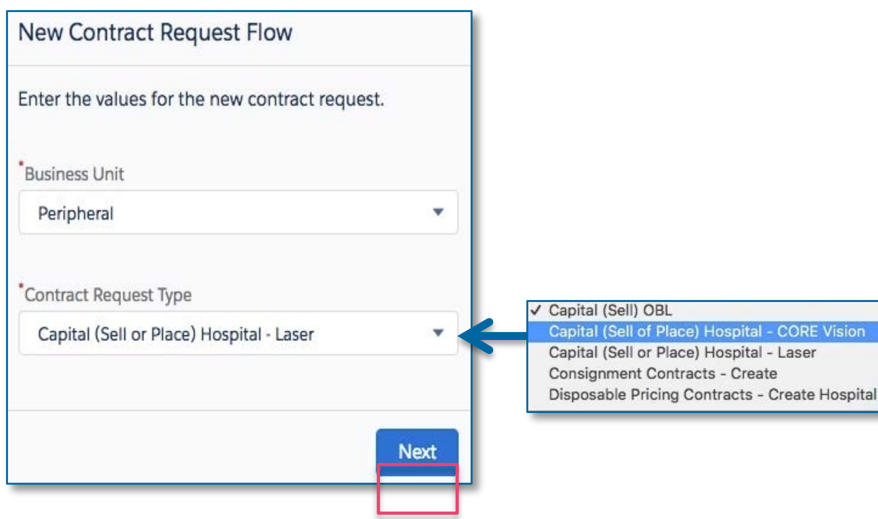
Salesforce provides a one-stop overview of all Contract Requests on each Account record.

To create a new Contract Request:

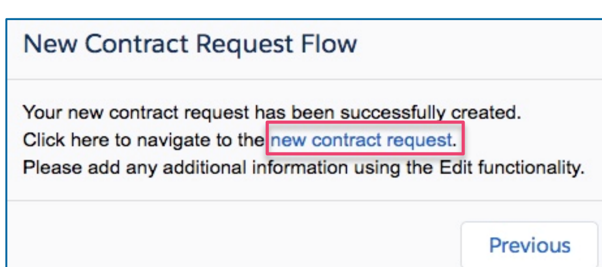
1. From the Account record, click the **New Contract Request** button.



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.

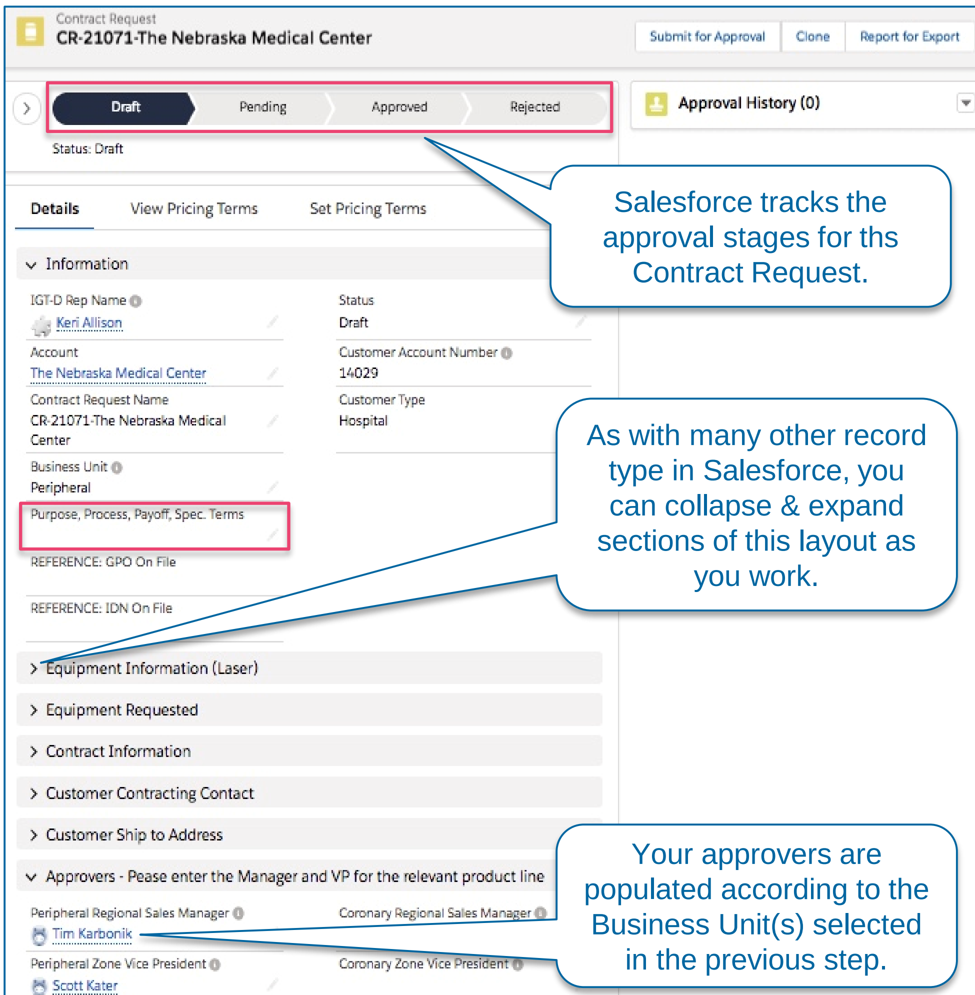


PHILIPS

Contract Request – Edit

Edit the Contract Request

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*.



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.

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.

PHILIPS

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.

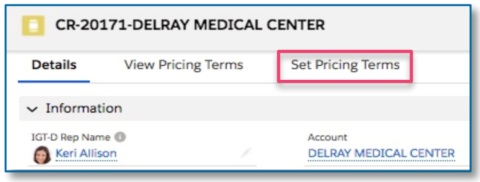
(Pricing Council doesn't appear among Approver fields, but if applicable will appear in the Approval History.)

Business Process

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

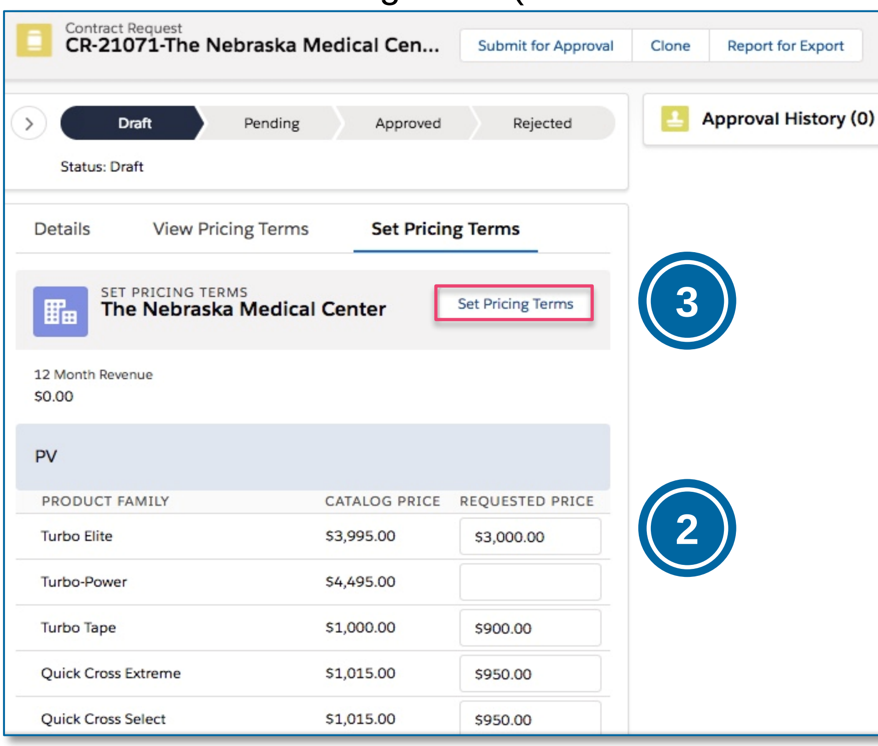
Pricing terms are set for each Contract Request.

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



1

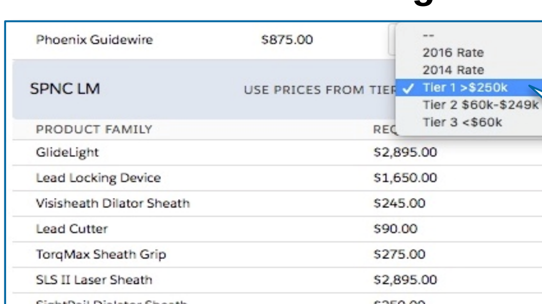
2. Enter the *Requested Price* for any product not to be sold at the Catalog Price (others can be left blank).



3

2

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



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

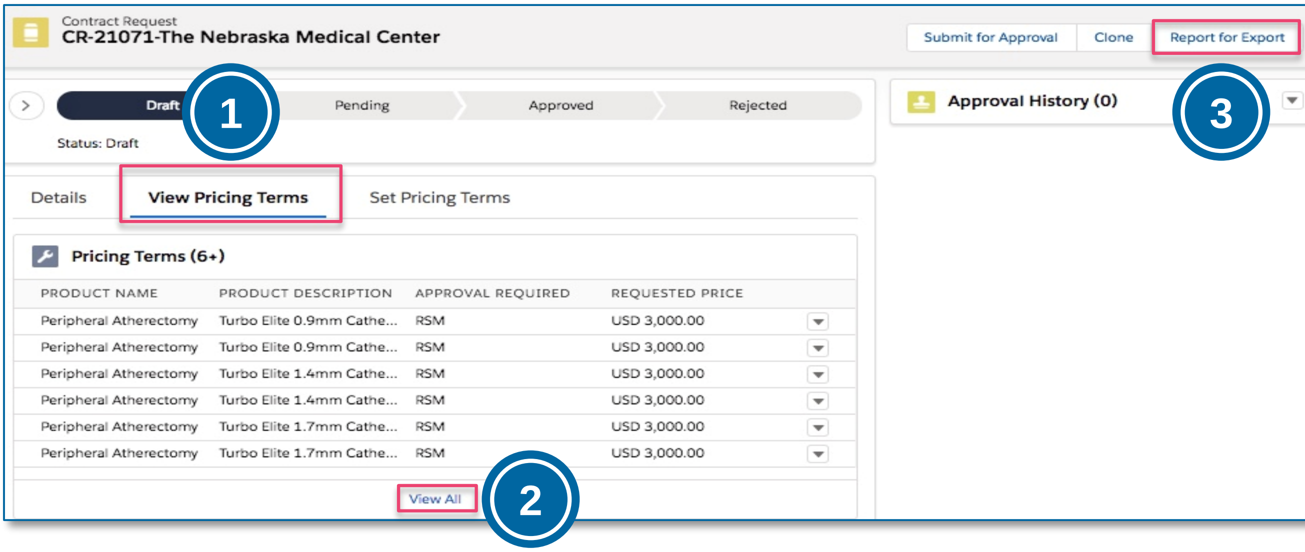
PHILIPS

Contract Request – View Pricing Terms

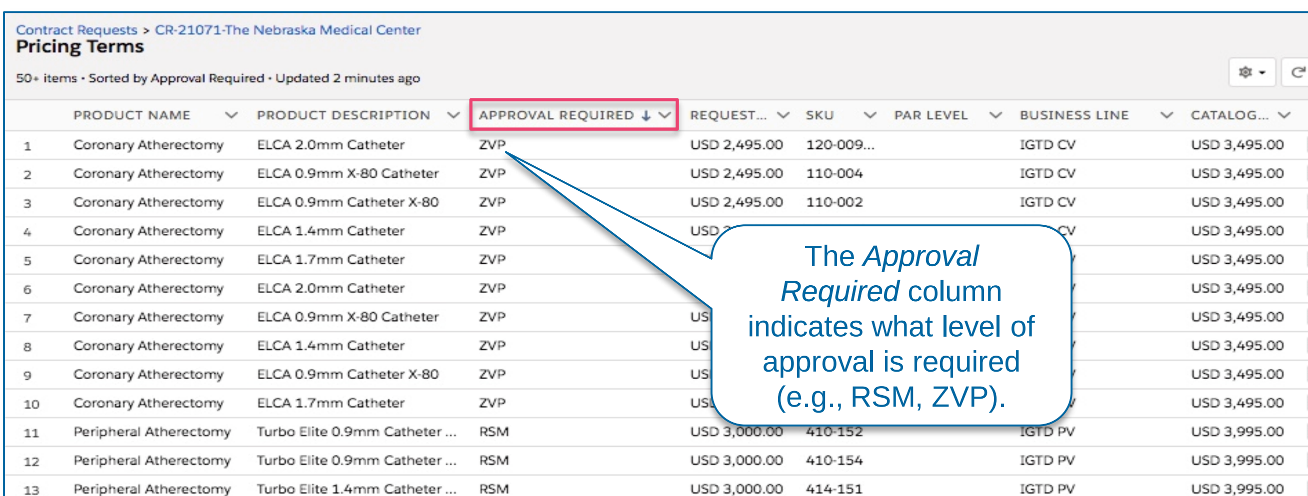
Pricing Terms and Product Information

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.



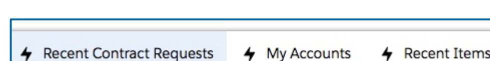
2. Click *View All* for more complete information (SKU, etc.) on these products.



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.



PHILIPS

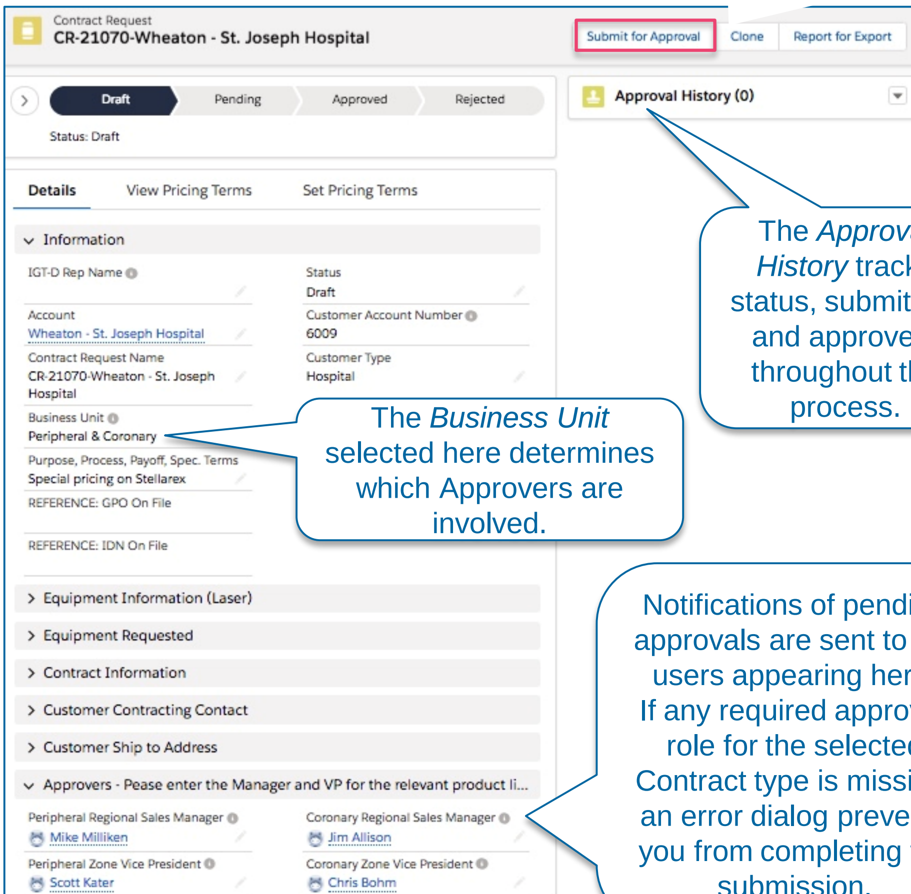
Contract Requests – Submit for Approval

Submit a Contrct Request 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.

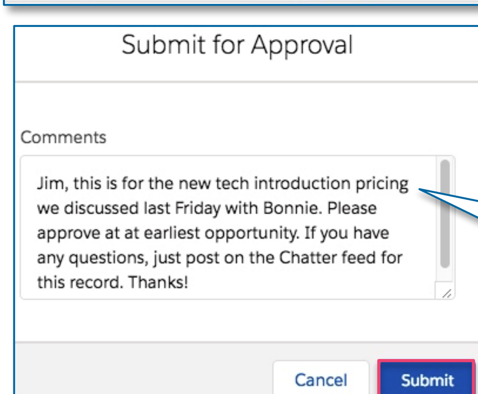
Once you have entered all the appropriate information on a Contract Request (including Pricing Terms) you are ready to submit for approval.



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.



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

PHILIPS

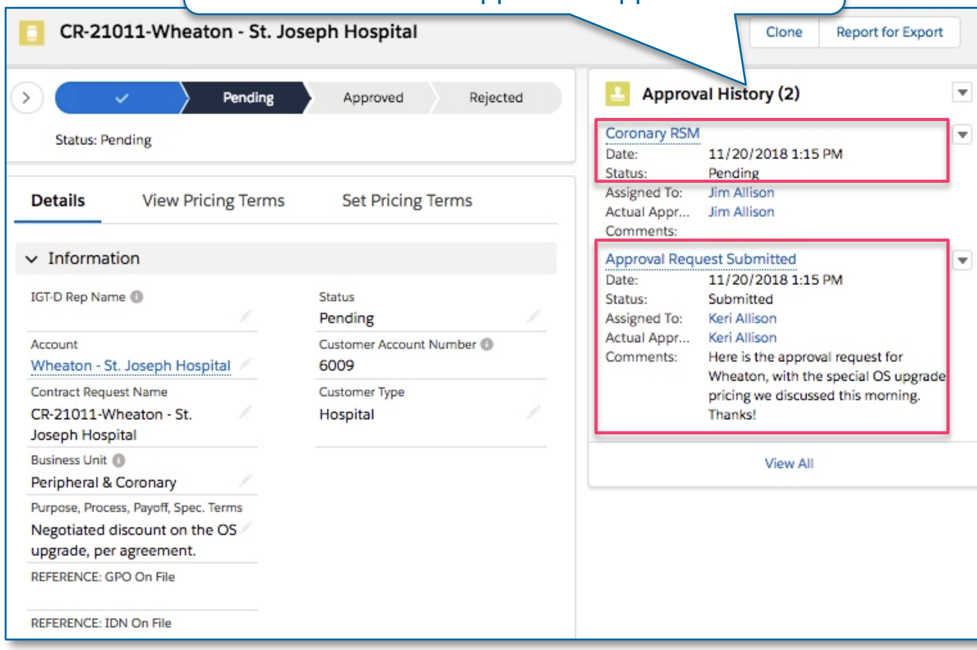
Contract Request – Approval Process

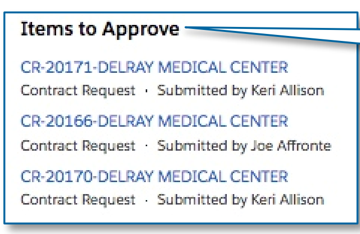
Our Approval Process

Business Process

System Administrators and other users with appropriate permissions can <u>reassign</u> approval to another individual.

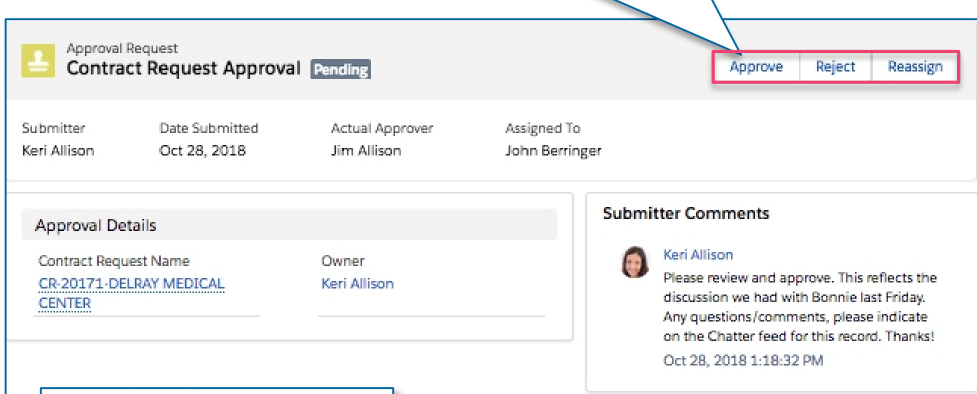
Approval status (Pending, Approved, Rejected) from the various approvers appears here.

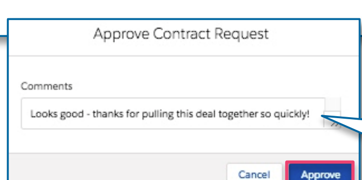




Approvers see this *Items to Approve* list on their Home page.

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





Approvers can add Comments when approving or rejecting requests.

Reports & Dashboards

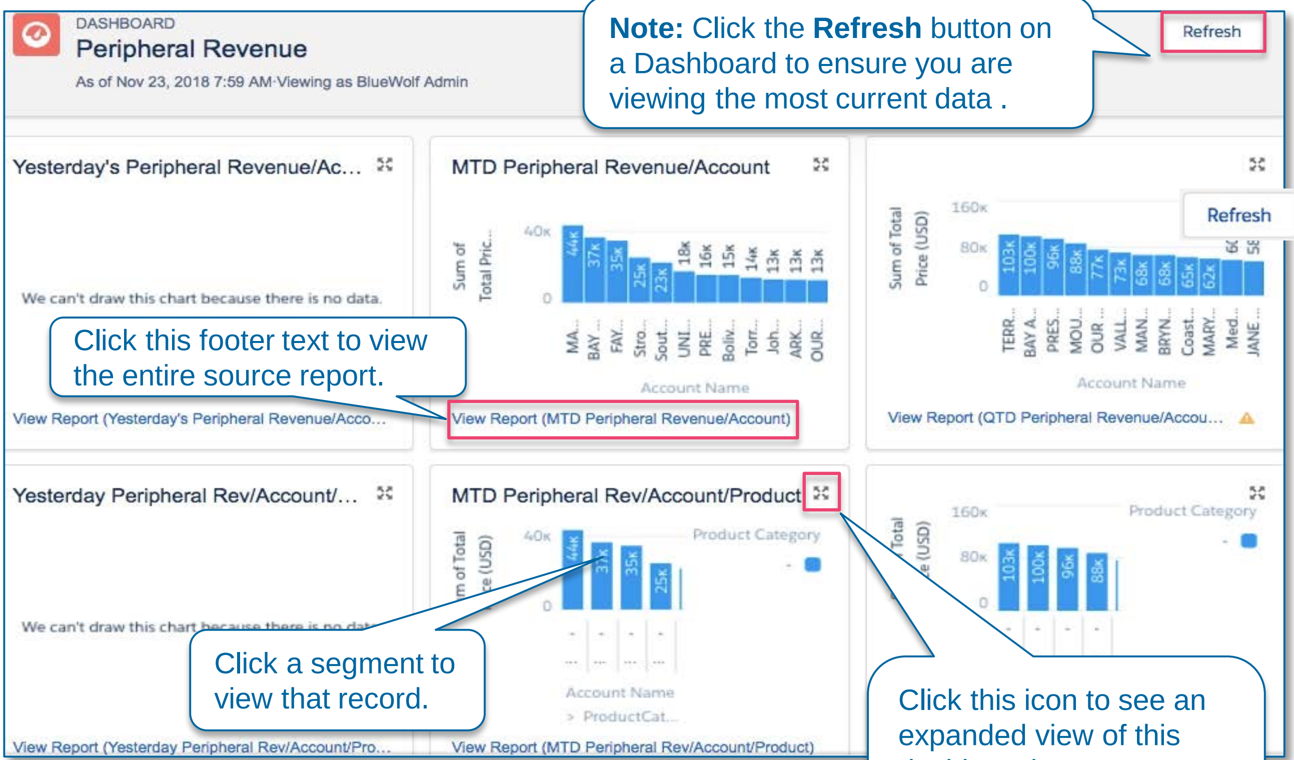
Reports & Dashboards

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.



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

Click this footer text to view the entire source report.

Click a segment to view that record.

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.

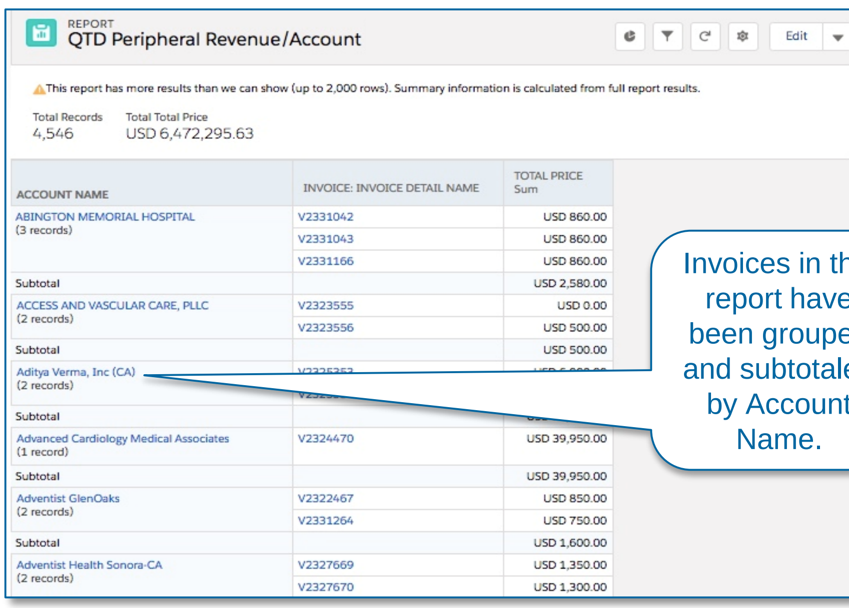
Business Process

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.

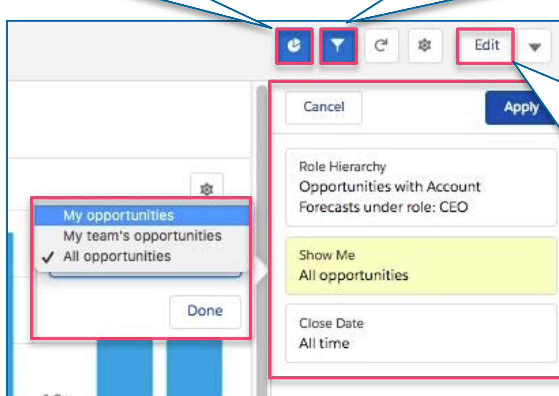
On the reports provided, you can change date ranges, reorder columns, add groupings, add or remove fields, then do a *Save As* for your customized version.



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.



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

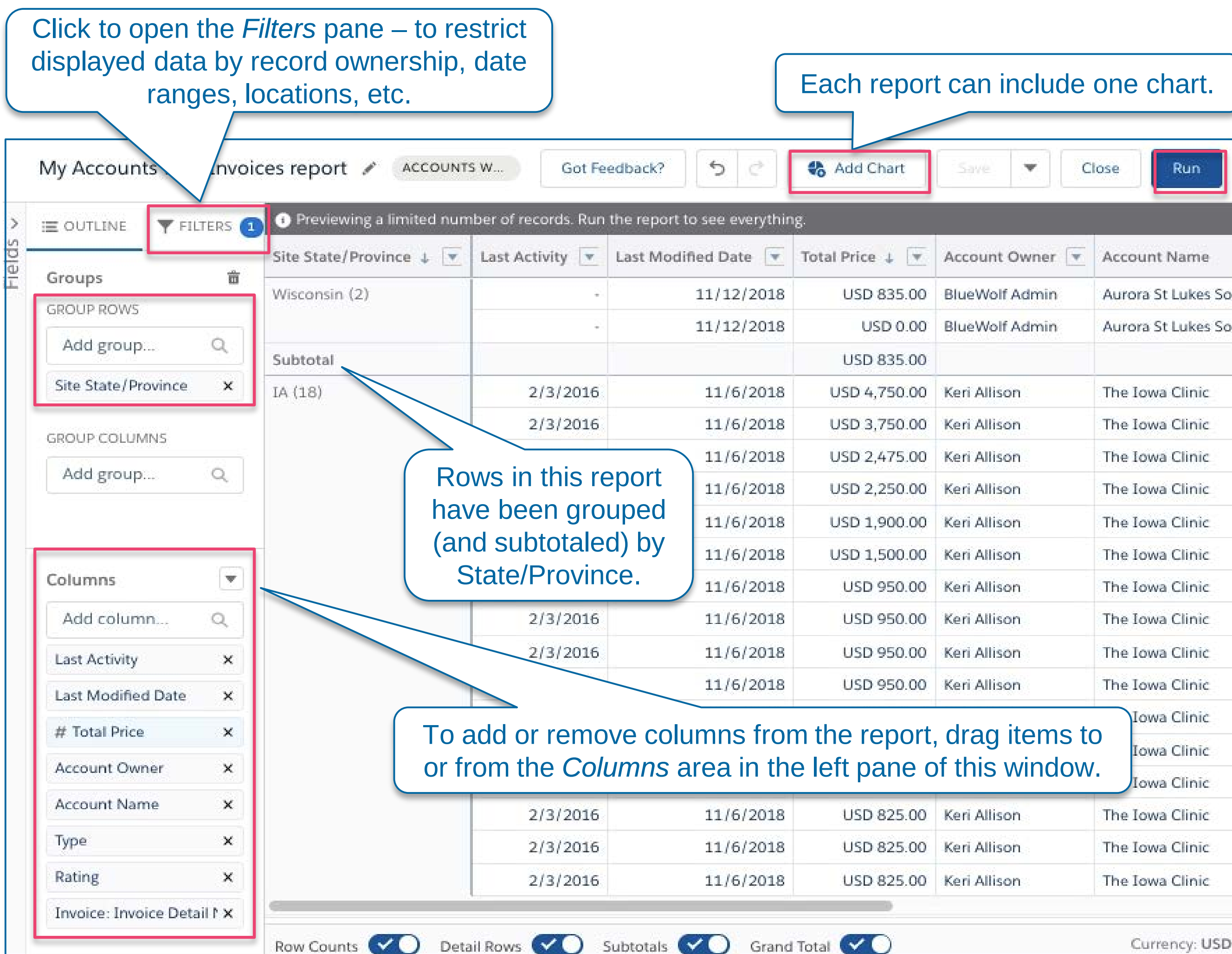
Reports & Dashboards

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.



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 <u>all</u> product categories.

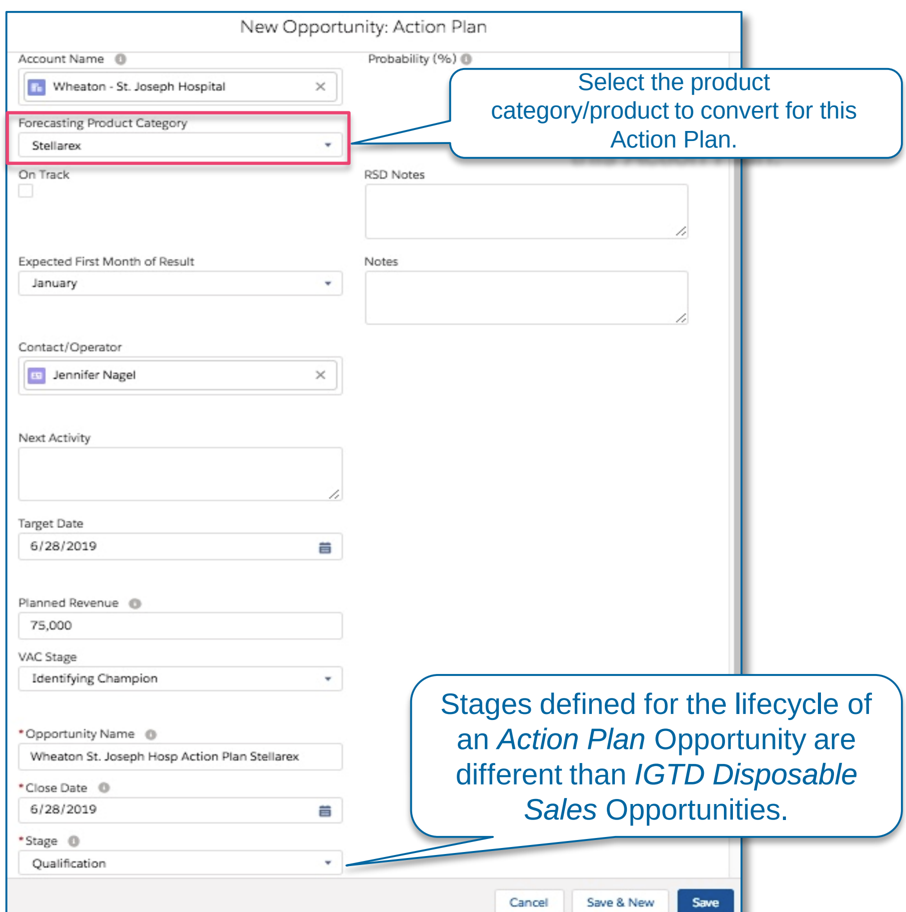
Important

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**.



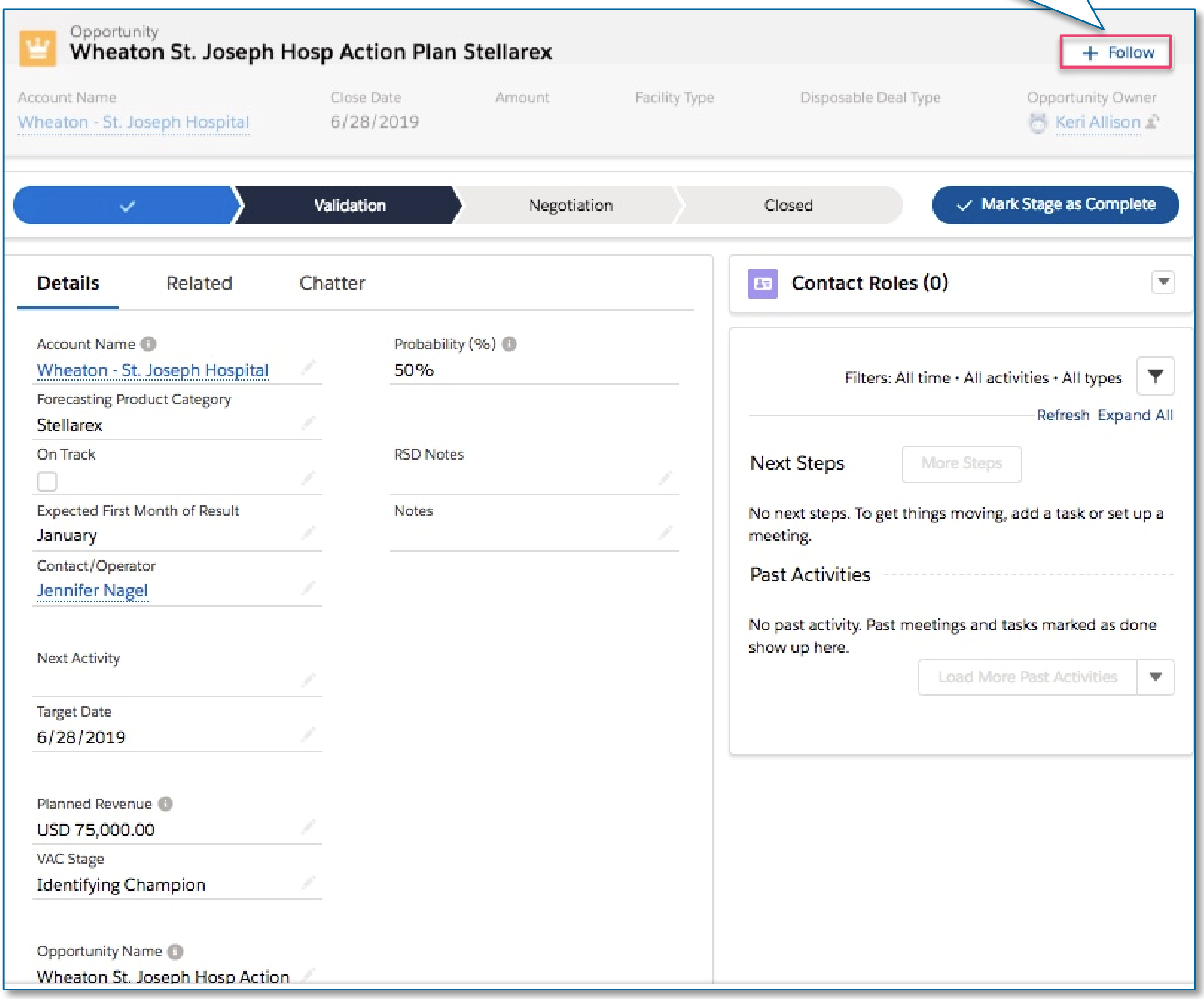
PHILIPS

Action Plan – Territory Managers (2)

Action Plan Record Layout

The Action Plan (a kind of Opportunity Record in Salesforce) is where you we 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.

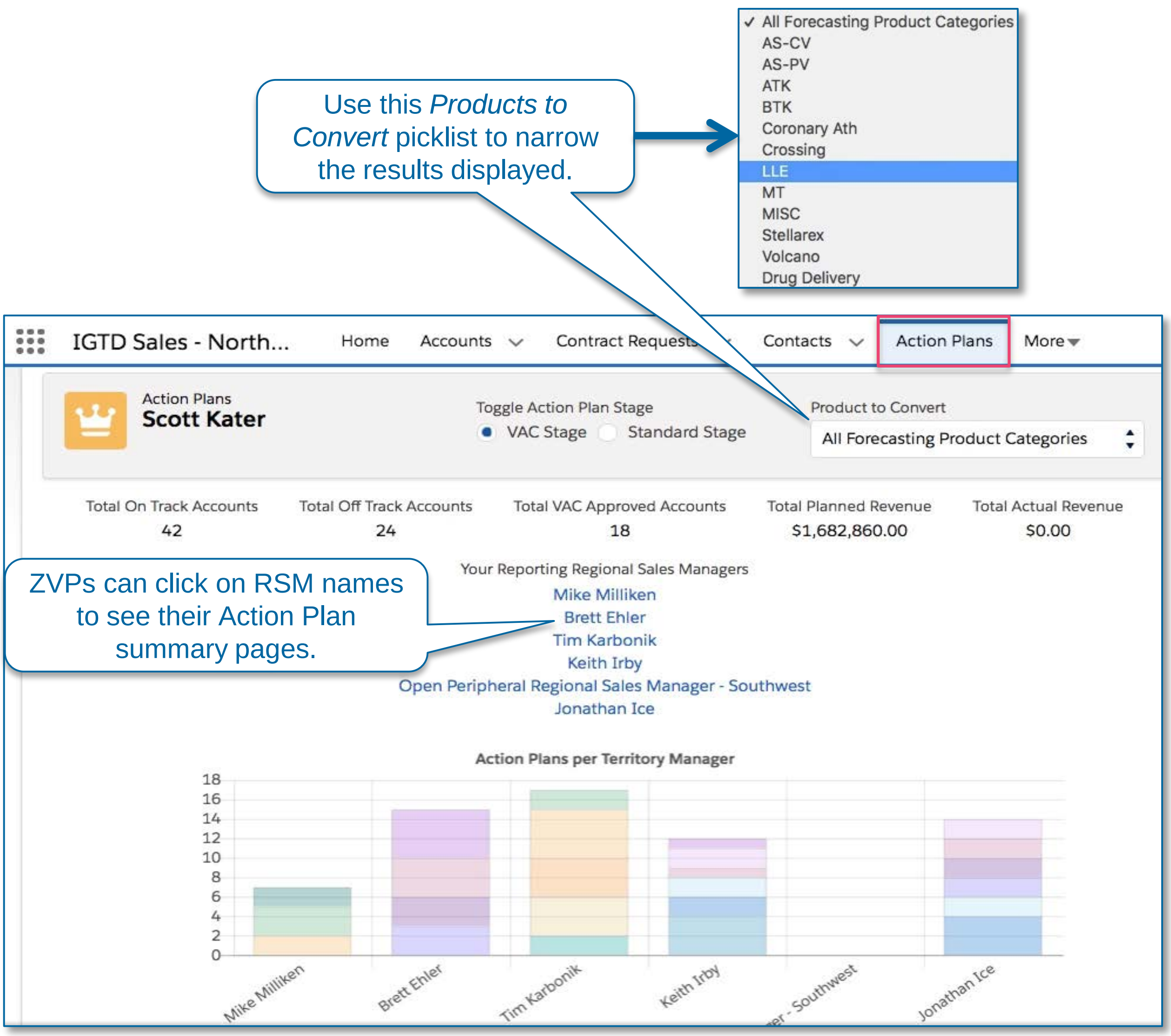


Managing Action Plans – RSM/ZVP (1)

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.

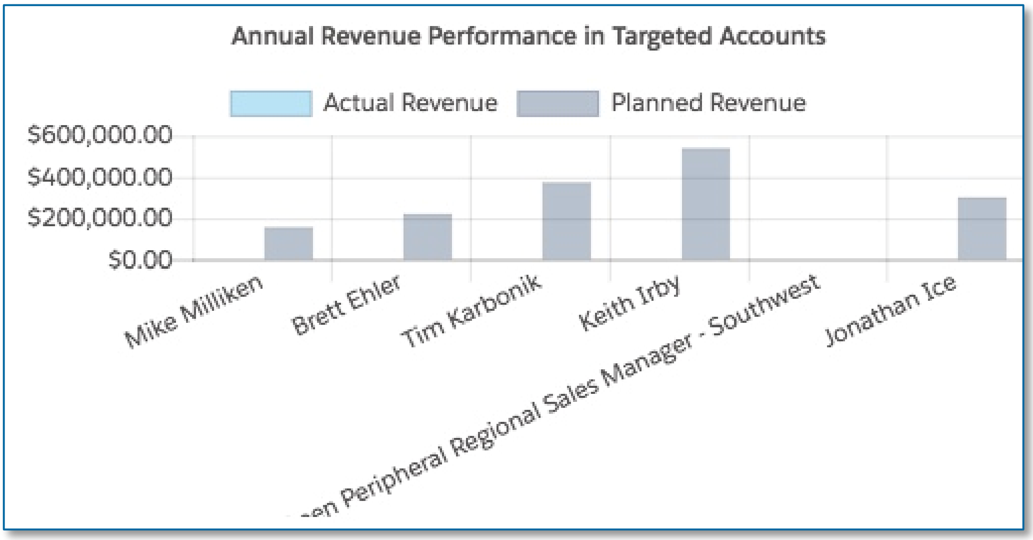
The screenshot on this page shows how ZVPs' view their RSMs and respective Territory Managers action plans.



Managing Action Plans – RSM/ZVP (2)

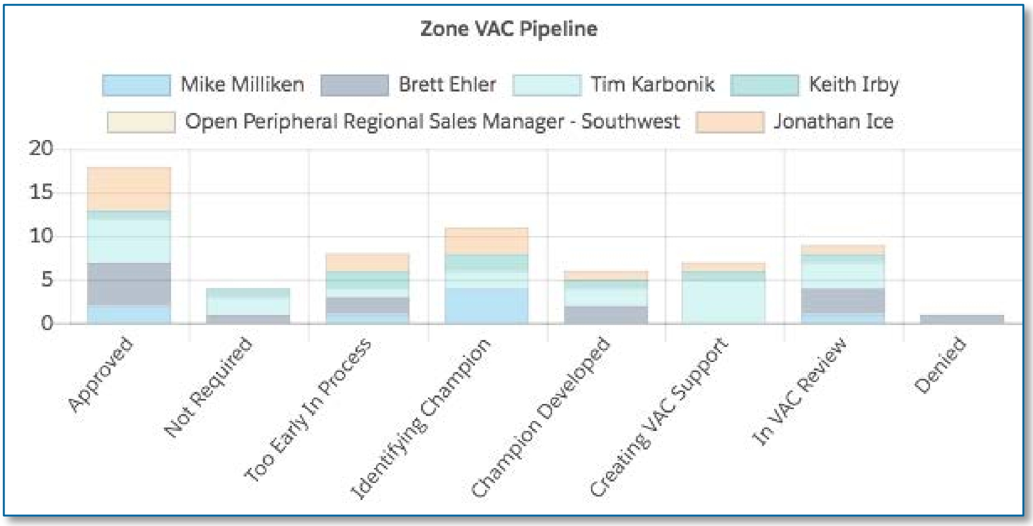
Targeting Accounts and Product Categories for Growth

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



TIP

Hover over these columns and segments to view details.



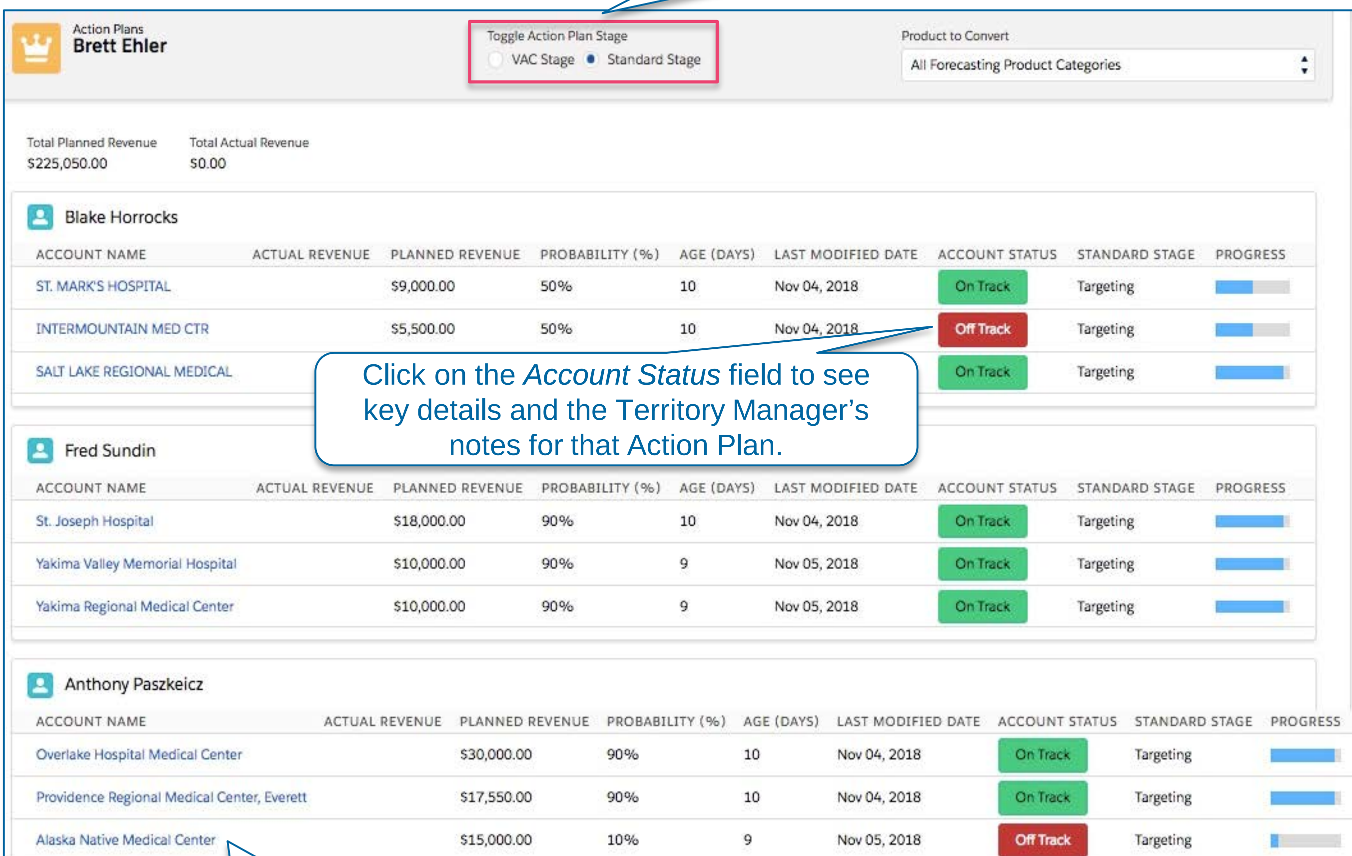
PHILIPS

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.



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	
INTERMOUNTAIN MED CTR		$5,500.00	50%	10	Nov 04, 2018	Off Track	Targeting	
SALT LAKE REGIONAL MEDICAL						On Track	Targeting	

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	
Yakima Valley Memorial Hospital		$10,000.00	90%	9	Nov 05, 2018	On Track	Targeting	
Yakima Regional Medical Center		$10,000.00	90%	9	Nov 05, 2018	On Track	Targeting	

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	
Providence Regional Medical Center, Everett		$17,550.00	90%	10	Nov 04, 2018	On Track	Targeting	
Alaska Native Medical Center		$15,000.00	10%	9	Nov 05, 2018	Off Track	Targeting	

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.

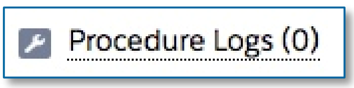
Procedure Logs

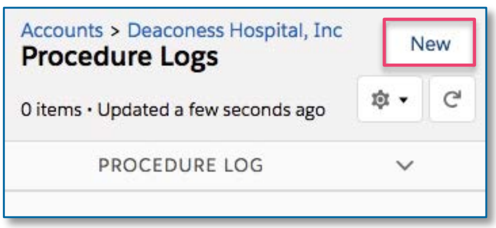
(Lead Management Users Only)

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.)





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.