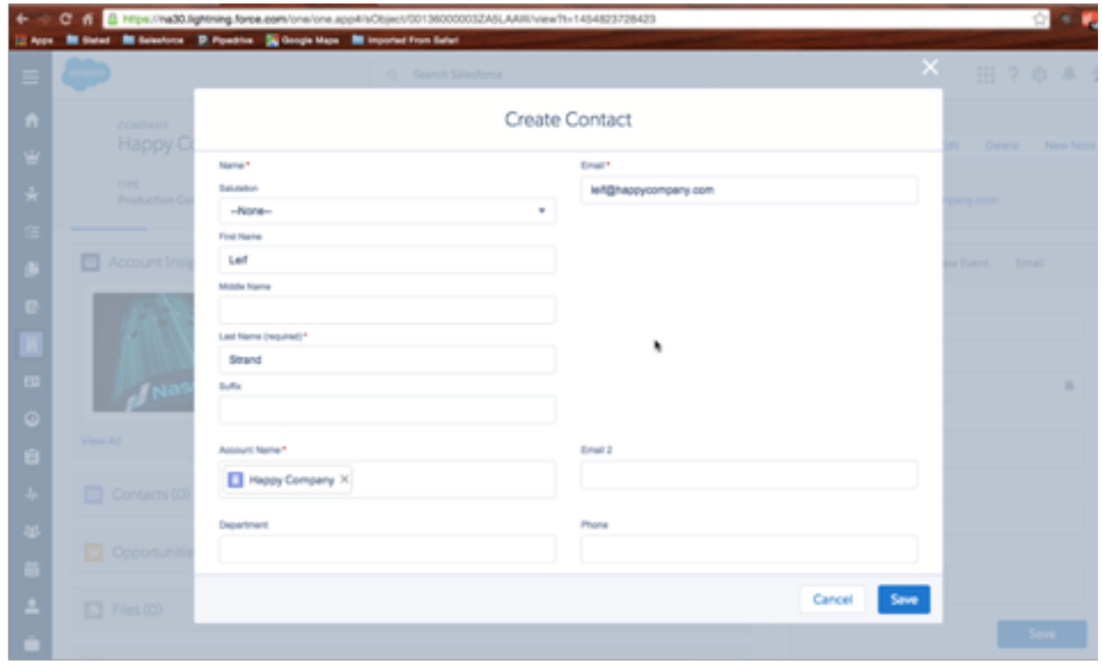
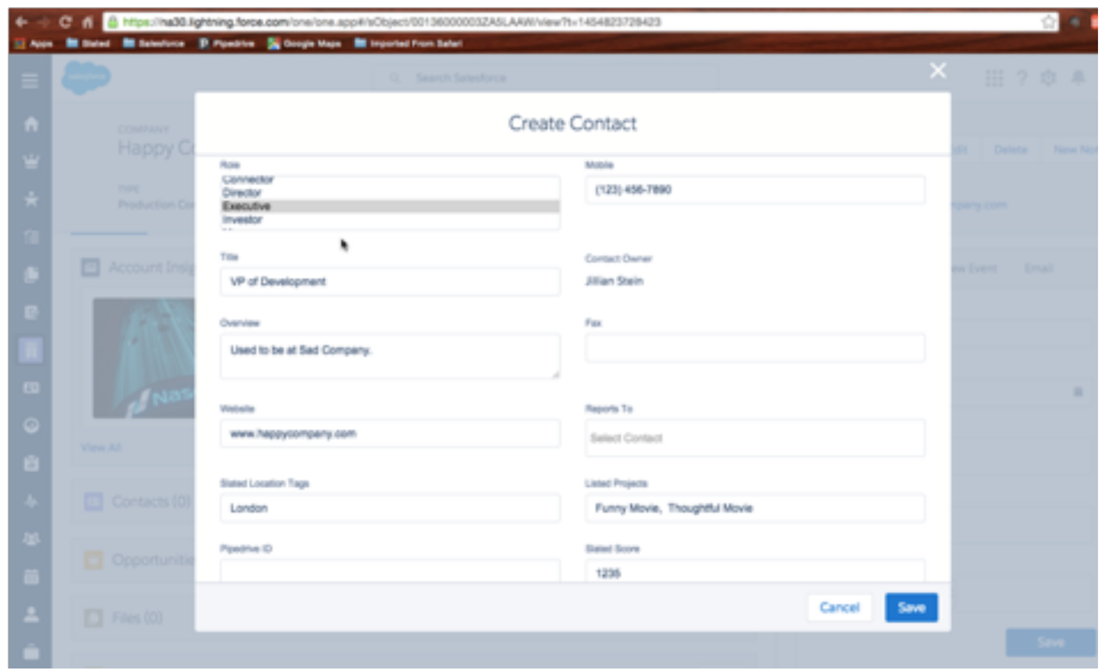
# CREATE NEW CONTACTS

- Open Contacts in Salesforce
- Select "new"
- Enter
    1. First Name, Last Name
    2. Account Name
        - Always check for Company BEFORE choosing "FirstName LastName Company"
        - Check- email signature, Slated.com/manage, imdb, linkedin etc.
    3. Email Address
    4. Phone
    5. RoleTitle
    6. Overview- quick reference details
    7. Also Avail- Website, locations



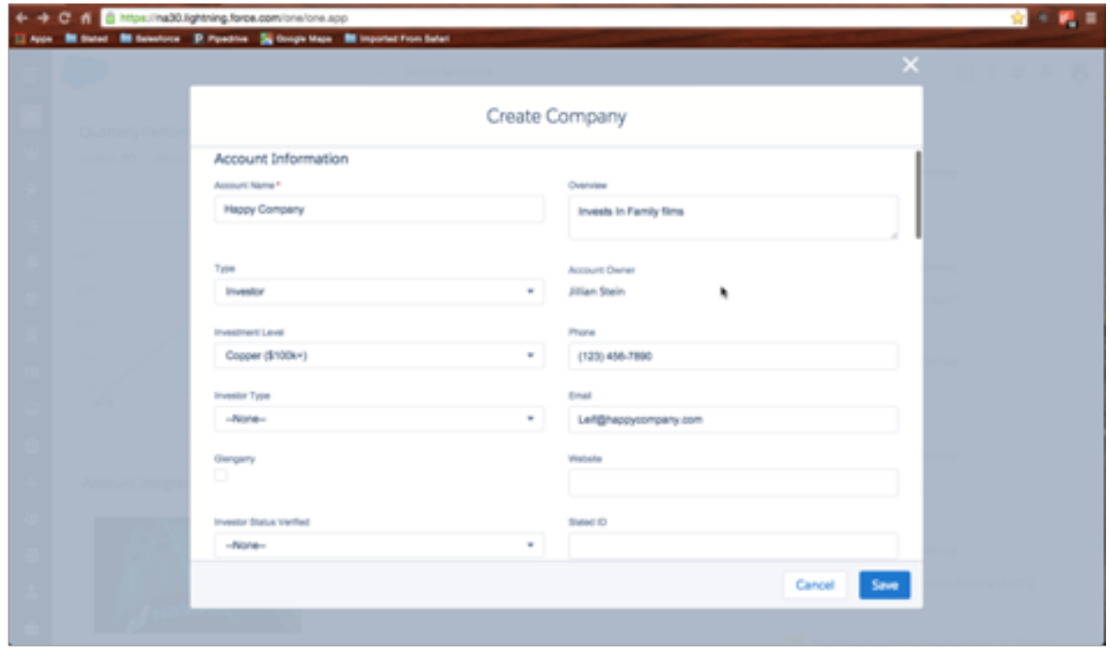



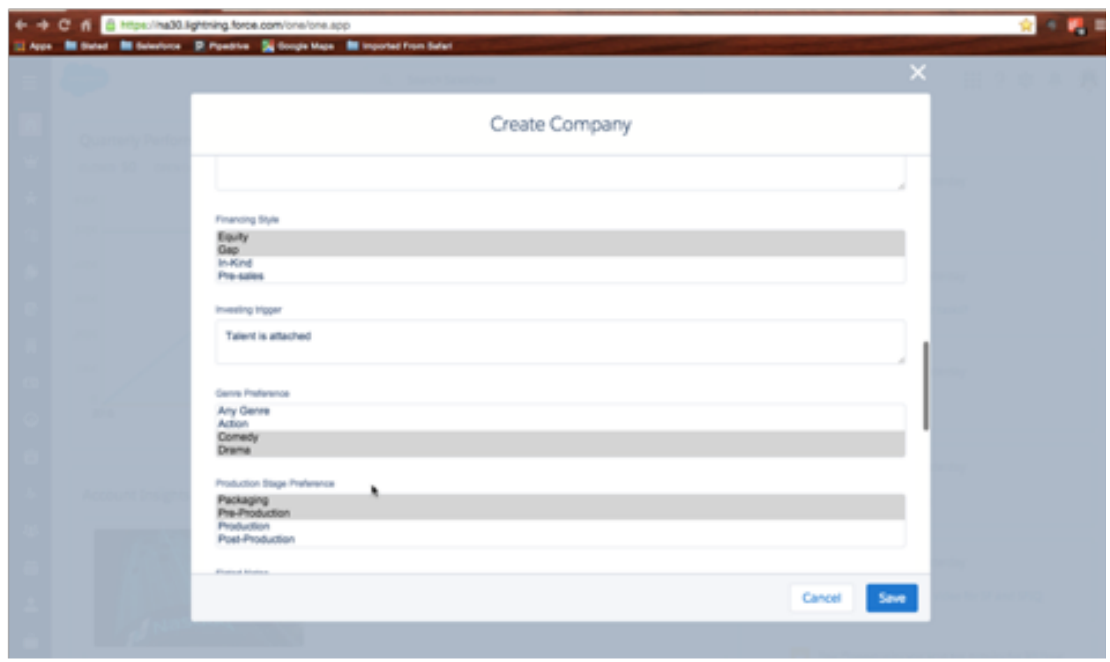
# CREATE NEW COMPANIES

- Open Companies in Salesforce
- Select "new"


- Enter

    1. Account Name
        - Always check for Company BEFORE choosing "FirstName LastName Company
        - Check- email signature, Slated.com/ manage, imdb, linkedin etc.
    2. Type of Company
    3. Investment level
    4. Financing Style
    5. Investing Trigger
    6. Glengarry
    7. Email Address
    8. Phone
    9. Overview- quick reference details
    10. Also Avail- Website, locations, role, Genre Preference, Production Stage Preference



# CREATE NEW OPPORTUNITY:

- Open Opportunities in Salesforce
- Select "new"
- Enter

1. Opportunity Name "EPS _ _*: Contact Name/Company Name"

    * Two letter code for project

2. Account Name

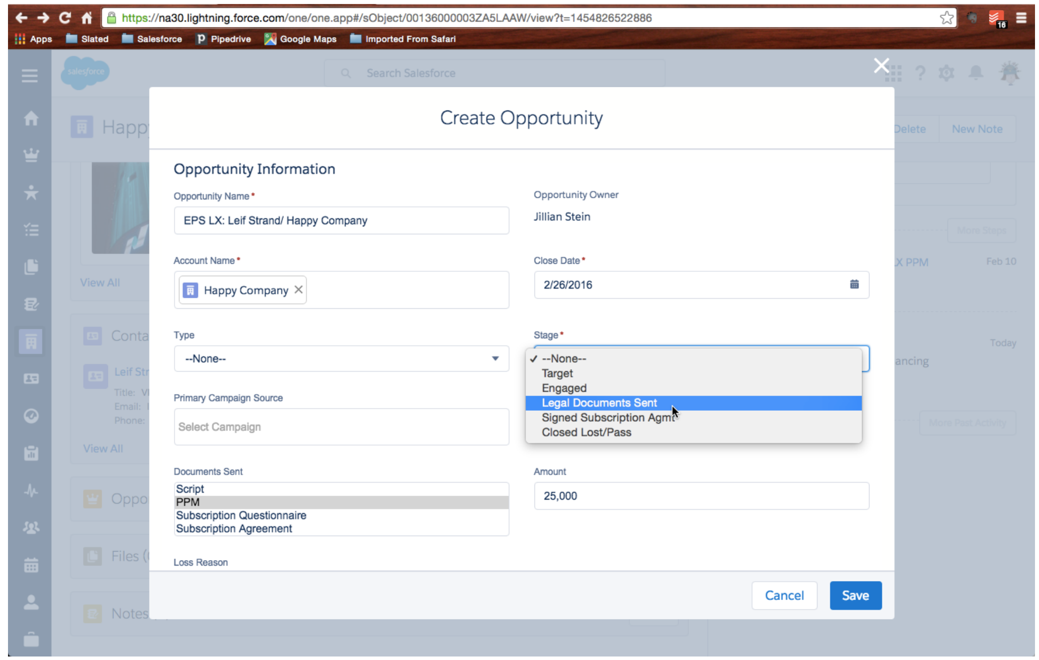
    - Always check for Company BEFORE choosing "FirstName LastName Company"

    - Check email signature, Slated.com/manage, imdb, linkedin etc.

3. Closing date
4. Stage of Project
5. Documents sent (if any)

    - Shift Click for multiple

6. Amount- estimated value of investment



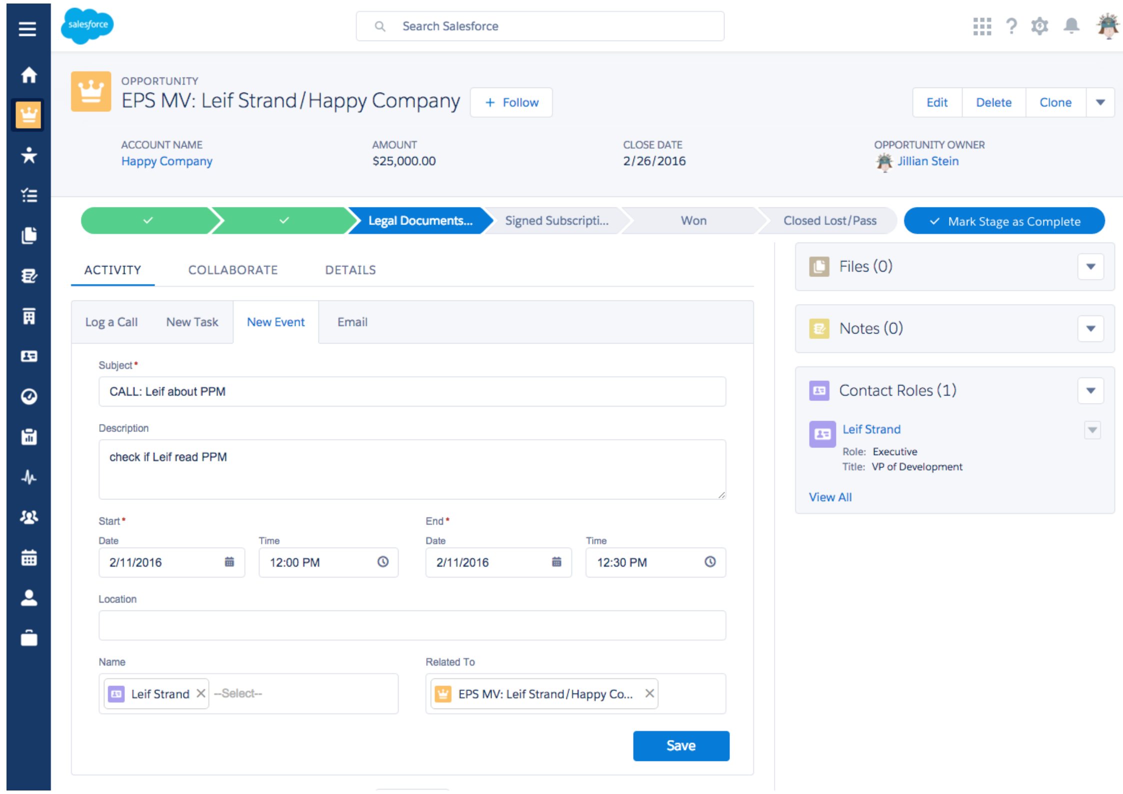
# LOGGING ACTIVITIES

Call/Meeting (after the fact)

1. In Contact, Company or Opportunities, select “Log a Call”
2. Enter a subject “CALL (or MTG)”
3. Select name of contact(s) on call
4. Select related to Contact, Company or Opportunities
5. Click Save

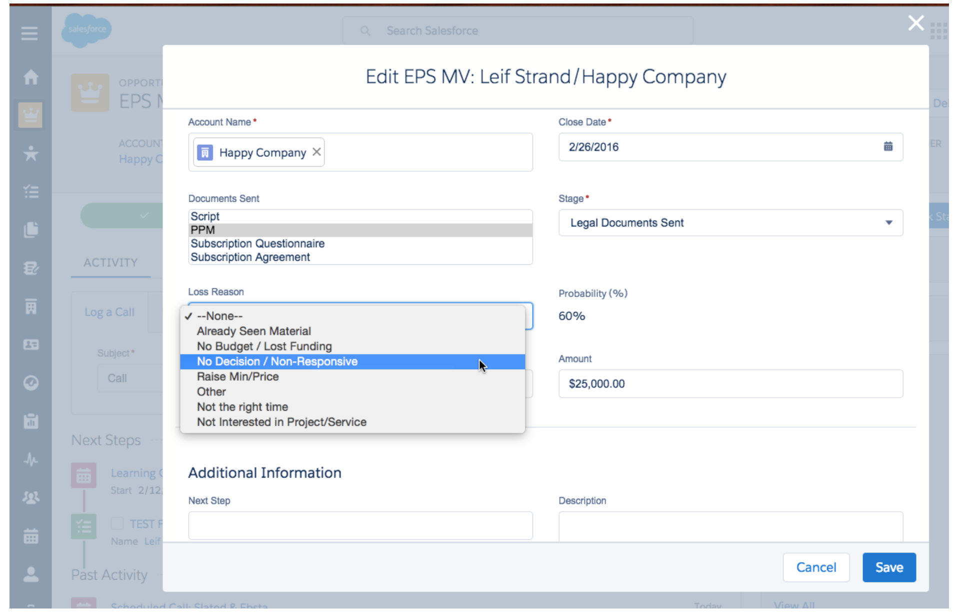
Scheduling Call/Meeting

1. In Contact, Company or Opportunities, select “New Event”
2. Enter a subject “CALL (or MTG)”
3. Add description of event
4. Select Start Date and Time & End Date and Time
5. Select name of contact(s) connected to Event
6. Select related to Contact, Company or Opportunities
7. Click Save



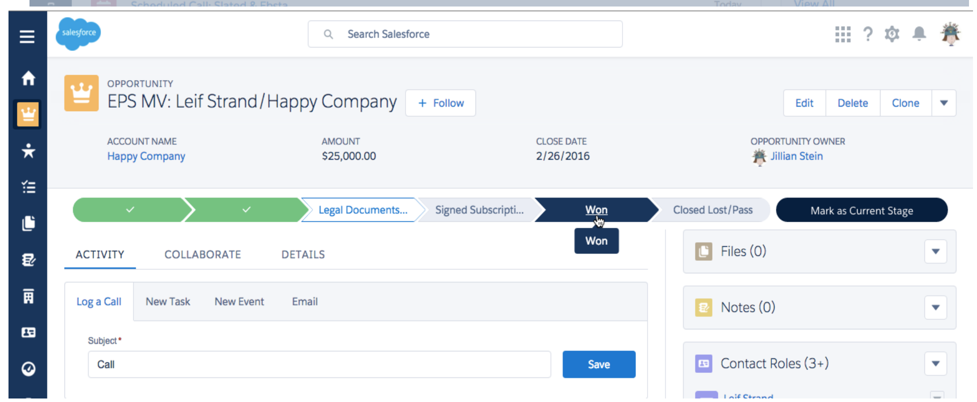
# UPDATING AN OPPORTUNITY


- Enter the name of the Opportunity in the search bar
- Click “Edit”
- Update
  1. Documents sent
  2. Stage
  3. Amount
  4. Loss Reason
  5. Also avail: Next steps, Descriptions
  6. Click Save



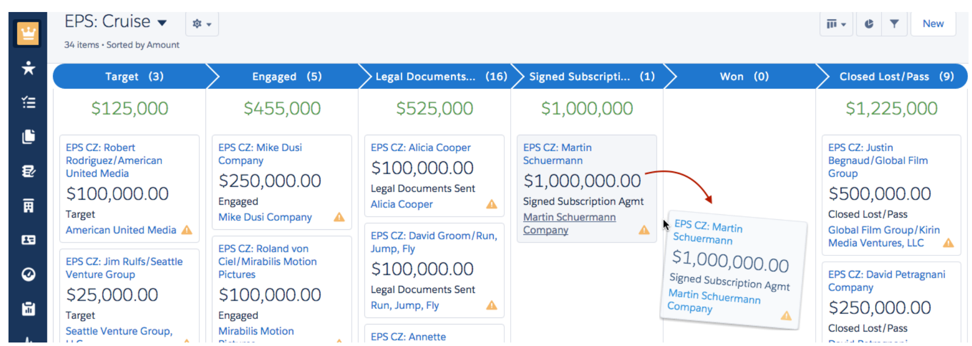

You can also quick update the stage

1. Click the appropriate stage on the Pipeline bar
2. Click “Mark Stage Complete”.




Or

Dragging the Card in Board View



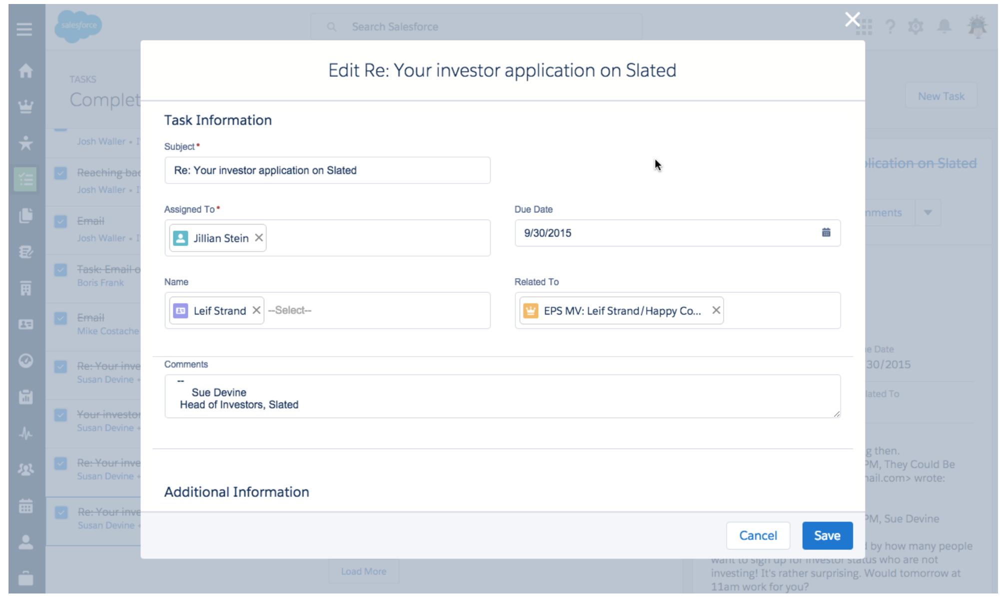
# ASSIGNING AN EMAIL WITHIN SALESFORCE

Emails that cannot be connected to an existing record will be listed as "My Unresolved Items" under tasks.

- Open Tasks in Salesforce
- Select the Unresolved Item.
  1. Rename Subject (if applicable)
  2. Enter your name in “Assigned to”
  3. Enter the name of the contact(s) of the email
  4. Enter the related Opportunity name
  5. Scroll down and mark task as complete
  6. Click save

Note: if the contact is connected to a company then the email should show up in both places.

You can use the same steps to create a task for you, or another User, to do.



# CHANGE RECORD OR OPPORTUNITY OWNER

1. Open the Contact/Company/Opportunities in Salesforce
2. Select “details”
3. Select “Change owner”
4. Select the new owner
5. Click “Change Owner"