



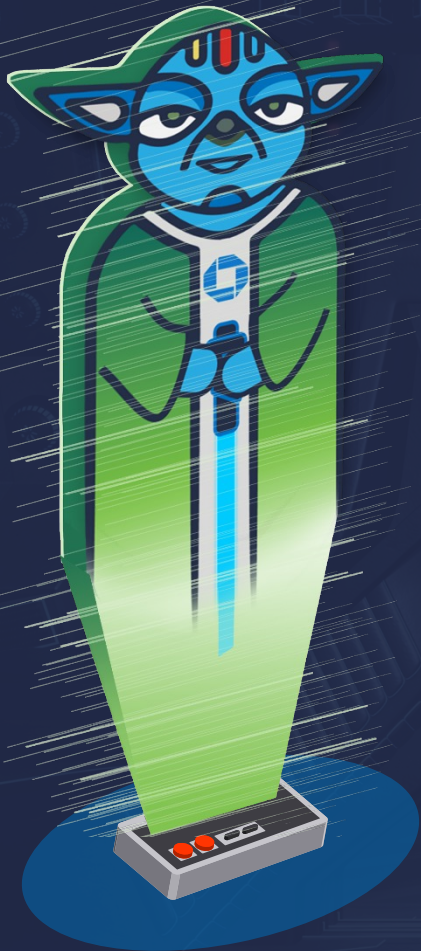
HARNESS THE POWER OF SALESFORCE

A Sales Warrior's Job-Aid

For an optimal experience, please view this job-aid in Adobe Acrobat Reader.
Video demos in this job-aid include audio, please turn up your speaker volume or use headphones.



SALESFORCE SAGE SAYS:



Welcome Sales Warrior!

For years, you have shown great skill by utilizing multiple correspondent tools - Prospecting Database, Chasebook, Contact Database, and CULP. Salesforce combines the strengths of all of these into a single modern-day weapon and makes you ever more powerful and ready.

This job-aid brings together lessons on how to get started in using Salesforce from the masters of Salesforce at Chase.

Welcome to this training and good luck!

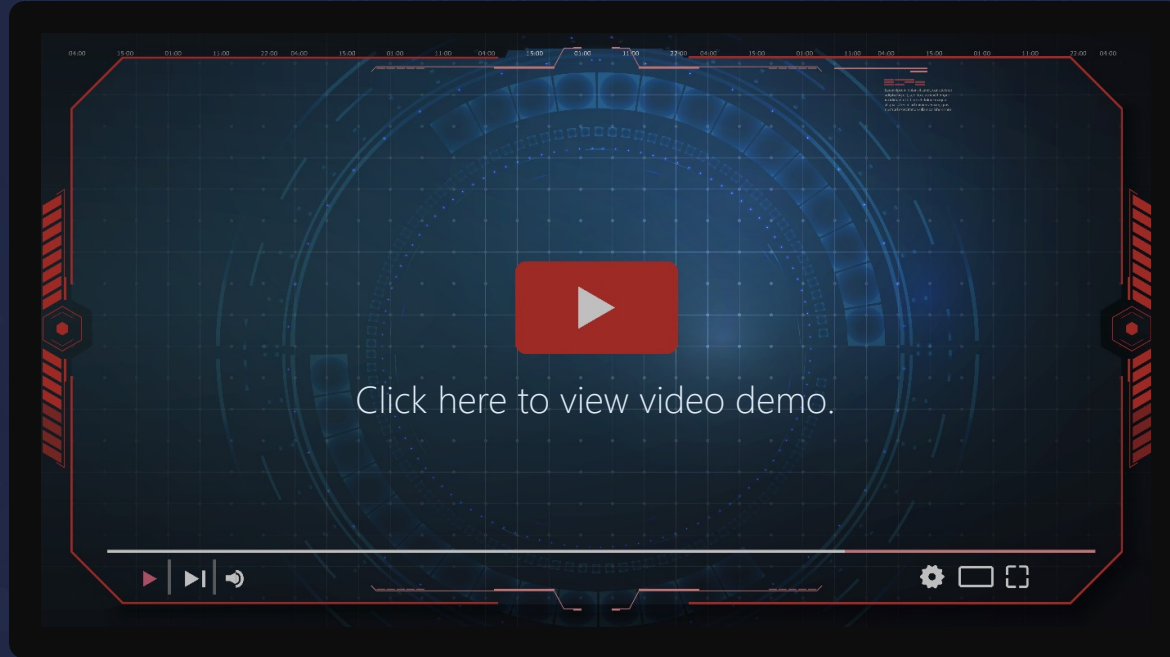


DOCKET OF CONTENTS

Agenda	Warrior Ranks Applicable
1. Introduction to Salesforce	All Ranks
2. How to Log in and Log Out	All Ranks
3. Key Sections of the Home Page	All Ranks
4. Salesforce Roles and Responsibilities	All Ranks
5. How to Log Activities and Notes	All Ranks Except Read-Only
6. How to Set Up a New Prospect Account	CDAE Sales Support Sales Manager
7. Understanding the Customer and Prospect Status Bar	All Ranks
8. View and Update Customer Account Information	AE Sales Support Sales Manager
9. Dashboards	All Ranks Except Read-Only
10. View and Run Reports	All Ranks Except Read-Only



1. INTRODUCTION TO SALESFORCE



Applicable to:



All Ranks



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2. HOW TO LOG IN AND LOG OUT



Applicable to:



All Ranks



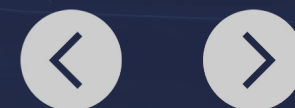
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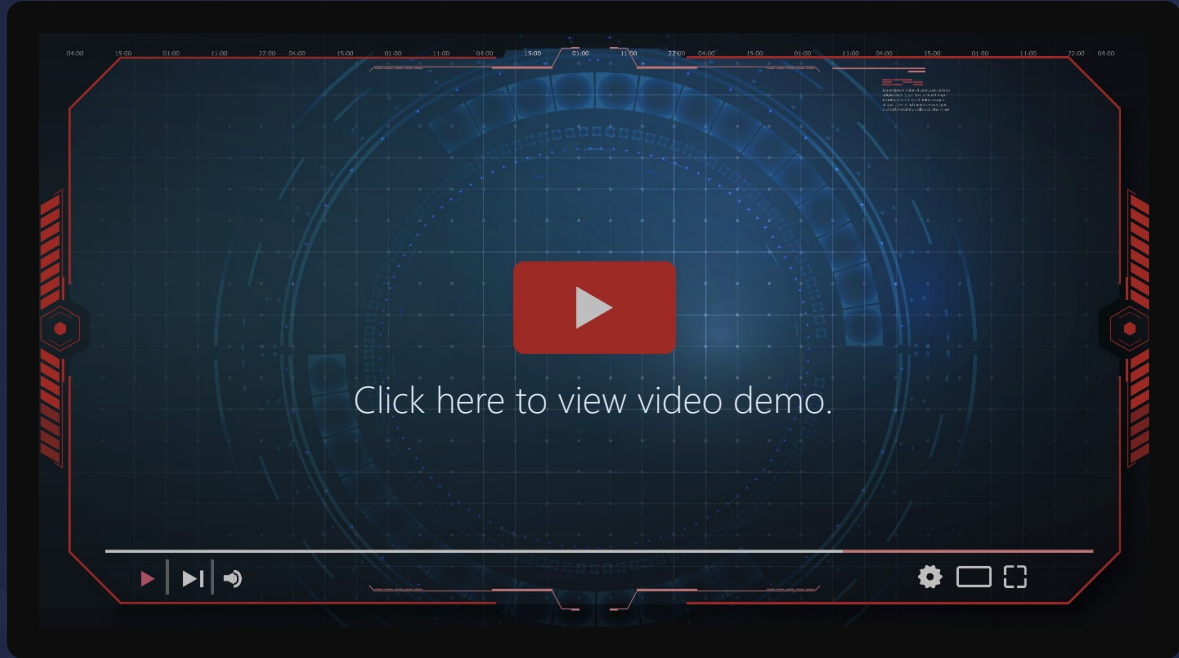


VIDEO TRANSCRIPT

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3. KEY SECTIONS OF THE HOME PAGE



Applicable to:



All Ranks



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VIDEO TRANSCRIPT

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4. SALESFORCE ROLES AND RESPONSIBILITIES

The screenshot shows a document header with the CHASE logo and the title "Salesforce Roles and Responsibilities". Below the title is a table with columns for "Salesforce Role", "Type of Access", and "Key Responsibilities/Expectations". A blue banner is overlaid on the table, containing a PDF icon and the text "Click here to view the document." with a mouse cursor pointing to the icon.

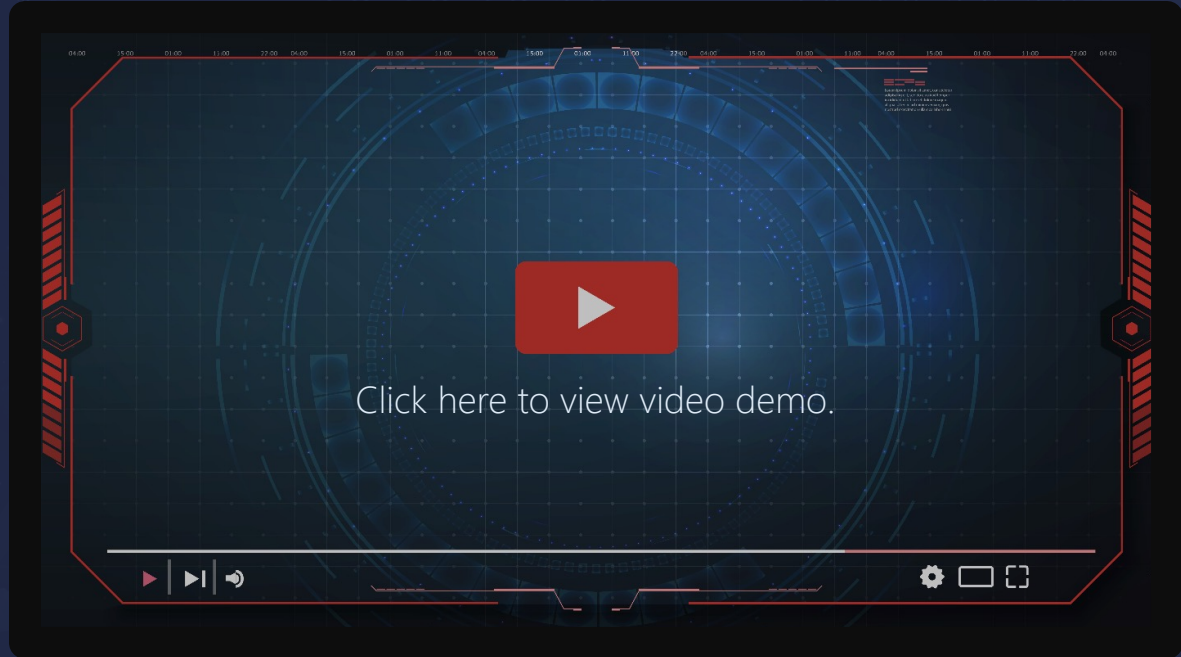
Applicable to:



All Ranks



5. HOW TO LOG ACTIVITIES AND NOTES



Applicable to:



All Ranks Except Read-Only



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VIDEO TRANSCRIPT

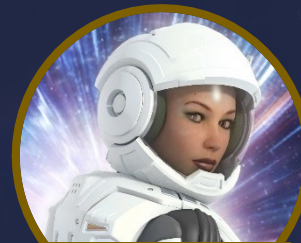
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6. HOW TO SET UP A NEW PROSPECT ACCOUNT



Applicable to:



CDAE



Sales Support



Sales Manager



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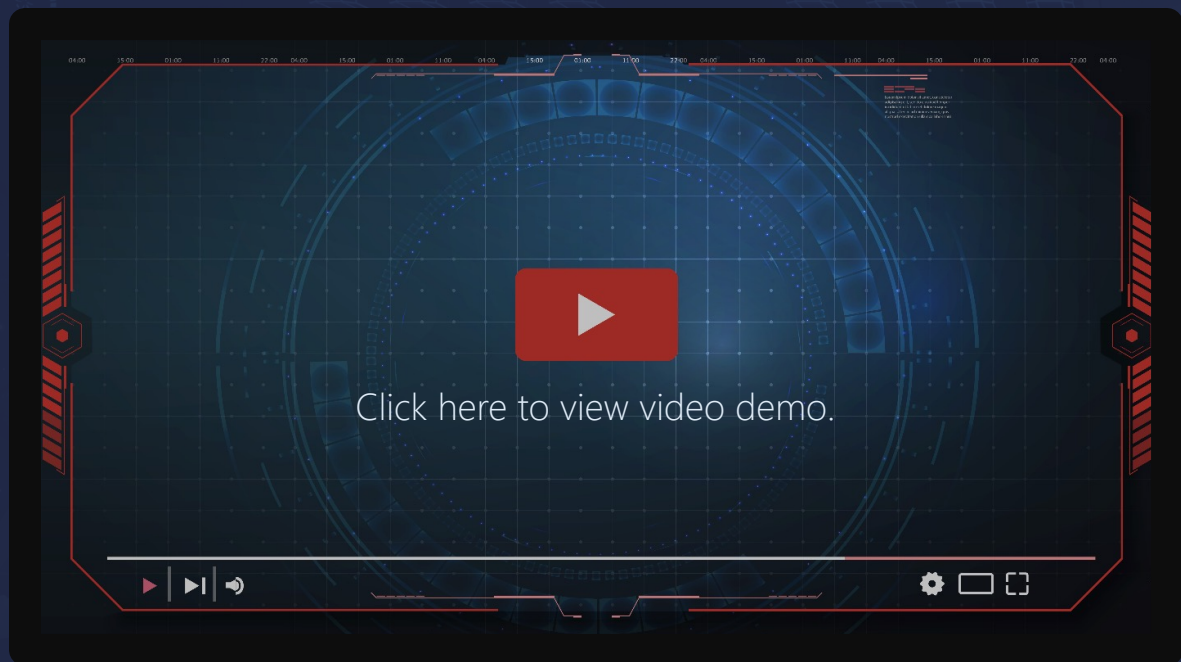


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7. UNDERSTANDING THE CUSTOMER AND PROSPECT STATUS BAR



Applicable to:



All Ranks



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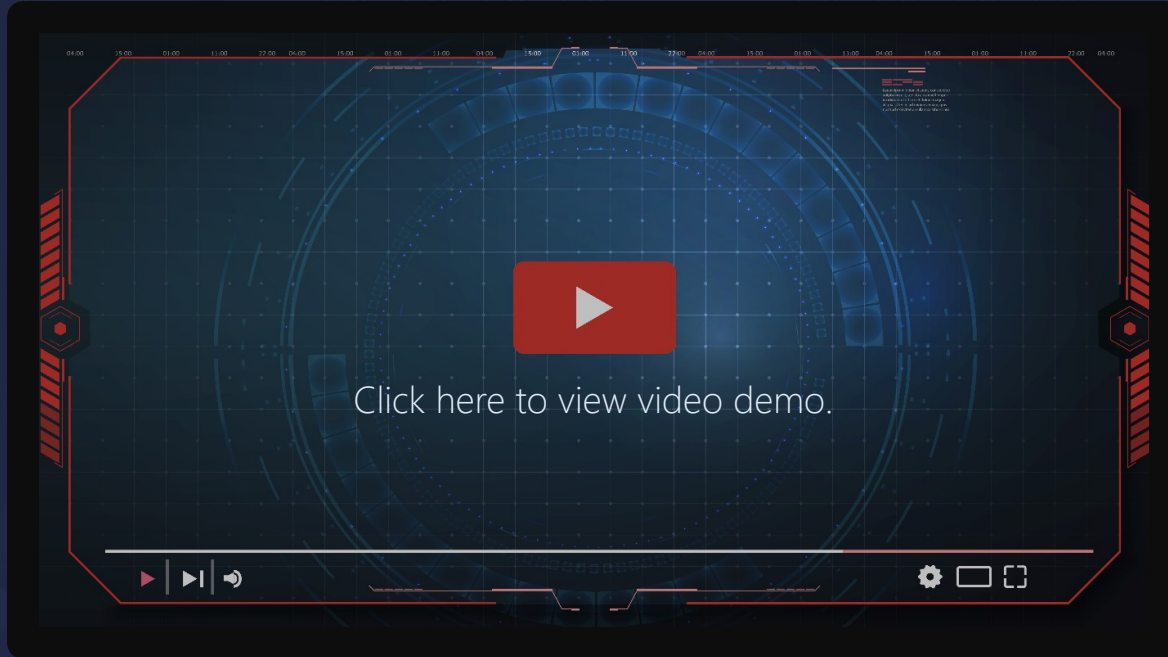


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8. VIEW AND UPDATE CUSTOMER ACCOUNT INFORMATION



Applicable to:



AE



Sales Support



Sales Manager



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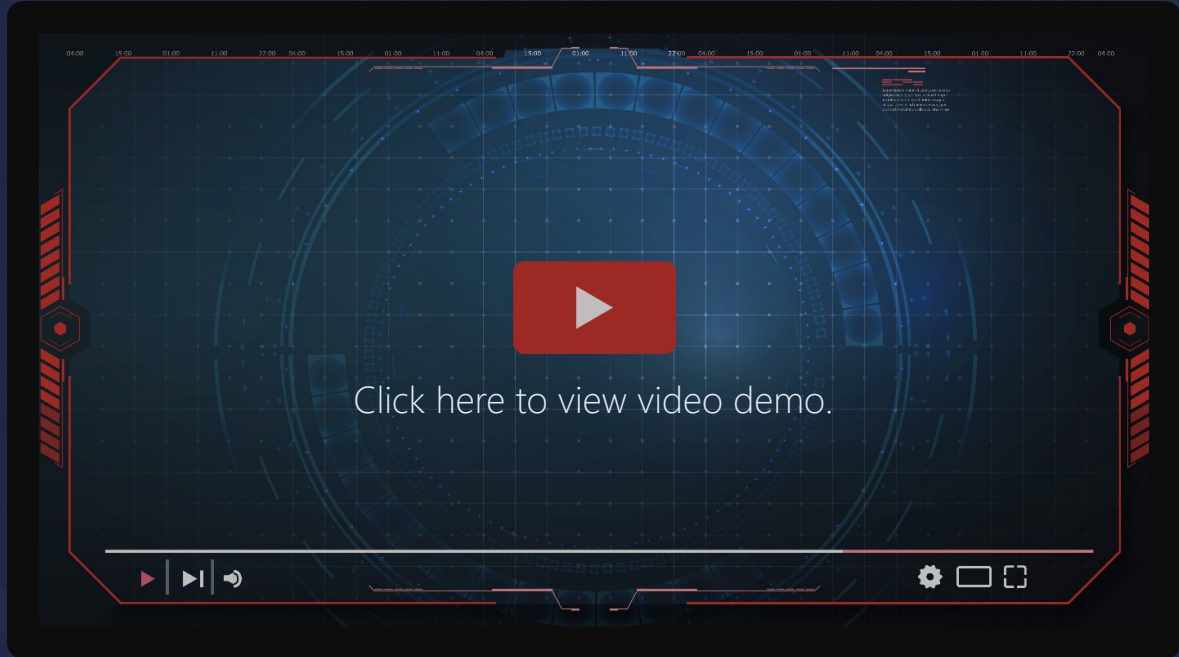


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9. DASHBOARDS



Applicable to:



All Ranks Except Read-Only



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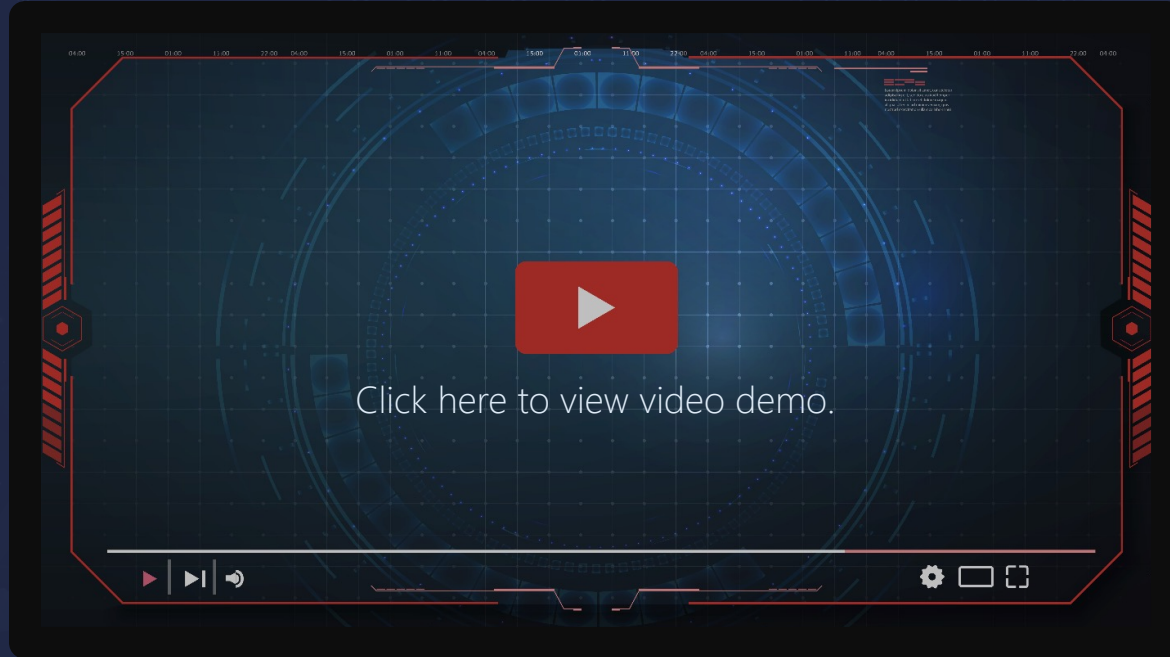


VIDEO TRANSCRIPT

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10. VIEW AND RUN REPORTS



Applicable to:



All Ranks Except Read-Only



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SALESFORCE SAGE SAYS:



Congratulations Warriors! You have completed your training-
Harness the Power of Salesforce training.

Please proceed to the **course assessment** on **learning@jpmc** now.
Assessment Name: Harness the Power of Salesforce Assessment.

Note: You need to pass the assessment with 80% or more to
get completion credit for this training.



THANK YOU!

