Delta Faucet Best Practices, FAQ, and More!

Purpose

The guide provides an overview of best practices, frequently asked questions, and other process information for working with Delta Faucet on Salesforce. It may be updated at any time based on ongoing iterations of the platform.

Delta Faucet Best Practices, FAQ and More!

DATA INTEGRITY - SEARCHING FOR DUPLICATES

Always search for duplicate data before creating new records.

- Use key words – Marriott, Curio, TRU, etc.
- Search for State by the two-letter code – MN, KY, TX, etc.
- Street addresses, zip codes, and emails are unique identifiers for opportunity, account, and contact records
- Sort results alphabetically
- Click "**Show More**" if you don't see what you're looking for right away
- If you get minimal record results... Make sure "**Search All"** has been selected!

Make sure the records you're creating follow our naming conventions, so data is easy to search and find!

SALESFORCE NAMING CONVENTIONS

Purpose

• Searchability & Consistency within Salesforce for all users
• Eliminate duplication of existing Accounts, Opportunities, Quotes, etc.

• Ability to quickly and accurately find, edit, follow up, track and report on activity

ACCOUNT

- Enter City and State into the new account record along with the Account Name and all other information you may have.
- Upon saving the account, Salesforce will auto-populate the full name of the account with **"Name - City, ST"** format and assign the agency, CSM and RSM for that territory.
- Fill in the Ship to Address – this is what will auto-populate the information, not the Bill-To.

Parent Account

- This Entity will have multiple names, brands, complexes, etc., under one umbrella.
- Examples: Hilton, Choice, Greystar, etc.

Parent Account name: Marriott International, Inc. – Bethesda, MD (HQ)

Account

- This Entity, Corporation, LLC, Partnership, etc., will have multiple project locations/requests or be the influencer on multiple projects.
- Examples: Cambria Suites, Hampton, AJ's Plumbing Supply, Ni2 Const.

Account name

- Cambria Suites Brand – Carmel, IN
- Ni2 Construction – Orlando, FL (HQ)

Exception: However, if you create an account in the pop-up window (see picture) **it will NOT auto populate** and only keep the account name as what you typed in the Account Name field.

Please go back to this account and add in the proper name, if you have the location information.

OPPORTUNITY

- This is the full name of the specified project.

- Enter complete Street Address (mandatory if a Remodel project), City, State and Zip (mandatory).
- Upon saving the opportunity, Salesforce will auto-populate the full name of the opportunity with **Opp Name City – ST – Zip** format.

Example Opportunity name:

- Marriott Residence Inn Carmel – IN – 46032

OPPORTUNITY RECORDS

- Multiple quotes can be housed on the same opportunity. No need to create a new one.

- Please search for existing opportunities before creating a new one. This not only keeps are data clean but ensures we are quoting jobs at the same price across wholesalers.

- The account of the opportunity is the primary group you are working with on the project – it is the company that is specifying and requesting the product. It is not the wholesaler or the agency.

Exception: If the wholesaler requests the quote but cannot provide who the owner of the job is or where the product will end up, then it is acceptable to put the opportunity under the Wholesaler Account name or a Parent Account **temporarily** (such as Marriott HQ for a Marriott brand hotel). Once the information is known, then edit the account information at the opportunity level.

- The Agency of the Opportunity will be auto-populated based on the project location.

- If there are other entities involved in the project that aren't already listed as the Account or Developer/Hotel Brand, but you want to tie them to this opportunity, put them as **Contact Roles or Partners**.
    - Find below the Quotes Section on the Opportunity Record.

- **Hotel Chain/Brand & Developer Fields**
    - Please look through the entire list before choosing OTHER
    - These required fields will help notify you of any national pricing programs (see below)**
    - This helps us track and understand who is buying from us, which in turn could help us get more national pricing programs

- **Opportunity Stage**
    - The stage automatically gets updated to Quoting or Ordering, when a quote or order is entered.

    - All other stage changes are updated manually.
    - **When a project is complete, move the stage to Closed. (Closed – Lost, Closed – Not Pursued, Closed – Won)**
    - This makes tracking jobs/wins/losses much easier.

QUOTE RECORDS

- The name of the quote should be the same or similar to the Opportunity name, so it is easily searchable.
- The agency on the Quote will be auto-populated based on the Wholesaler location.
- **Please ensure that for a specific job, the price across quotes for different wholesalers is the same.**
- If you are quoting outside of your territory, you must contact the local agency to keep them updated, align on quoted pricing, or gain other pertinent information.

CONTACT RECORDS

- View contact records to see information such as the source of the lead, what industry they work in, if they've gone to a DFC event or other general notes.
- Add them as a Contact Role on your Opportunity if they are involved with the project.
  If you know a contact is no longer with a company or accurate, delete the contact or move to an account called **HOLDING BIN - DO NOT USE**. This is where we house old contacts that cannot be deleted.

CHATTER

Use Chatter to communicate with others, share updates, or post files on Salesforce records.

This allows you to see the latest activity on the record. Click "Show Feed" at the top of the page to see the Chatter tool.

Click on the Chatter tab to get a snapshot of all activity.

- Pay attention to **What I Follow** or **To Me** sections
    - This will show you activity you have been tagged in or activity related to any records/people you follow.

FREQUENTLY ASKED QUESTIONS

Q: Is there a file that lists the national programs and multipliers that DFC has with multi-family developers?
A: Yes. Please go to Libraries in Salesforce and click on the **"Multi-Family - All Agency Users" library**. You will find a document labeled CONFIDENTIAL AGENCY Multifamily Multiplier Summary Q1 2020.

It is updated as we get new agreements. You can also find the pipelines for our national agreement holders in this library.

Q: Are Ferguson sales numbers included in Salesforce reporting?
A: Yes, they are. However, since we do a reconciliation process with Ferguson the data is one to two months behind so the timing of the releases might not reflect what you would expect.

SPECIFICATION CREDIT

To be eligible for Specification Credit compensation

1. The project must be quoted through the Salesforce Job Quote system.
2. The total project invoice must be greater than $10,000 or have a minimum of 144 pieces.

NOTE: You **ONLY** need to claim spec credit if the project is **outside** of your agency's territory.

To Claim Spec Credit

1. On the **Opportunity**, check "Claim Spec Credit" box to indicate your intent to request Spec Credit compensation.
2. Select from Drop Down list – Spec status: Locked Spec, As Equal Spec, Open Spec
3. Enter Specifying Agency name
4. Enter Specifying Agency Rep name
5. Save Opportunity and confirm the information was captured.
6. Attach qualifying documentation – Plumbing Schedule, Letter from the Engineer, etc. in the **Notes & Attachments** section showcasing the work you did to secure the spec.

Upon Spec Credit Claim fully entered into Salesforce

- An email will be generated and sent to the Specifying Agency, their RSM and Delta Quote Desk, acknowledging the claim has been entered.
- An email will be sent to the Project Location Agency and their RSM notifying that there is a Spec Credit claim on a project within their territory.
- If the Project Location Agency wants to challenge the Spec Credit claim:
    - Check "Project Location Agency Challenge" box to indicate your intent to challenge the validity of the claim.

Upon Spec Credit Challenge initiated in Salesforce

An email will be sent to the project location Agency, their RSM and the Delta Quote Desk, acknowledging that the Challenge to the Spec Credit claim has been initiated in Salesforce.

An email will be generated and sent to the Agency that requested the Spec Credit Claim and their RSM, notifying them that there is a challenge to their claim.

Validating & Processing the Claim

The Sales Operations Team validates the claims monthly and sends them to Finance to process. If you have questions regarding your claim, please contact quotedesk@deltafaucet.com.

Once a claim is challenged, that is up to the RSMs to decide how to resolve the matter.

ACTIVITIES – TASKS, CALLS, AND EMAILS

Log calls, create tasks, and send emails directly from Salesforce to make it easy to stay on top of leads, contacts, or other things you need to get done.

Creating a Task

- You can assign yourself or others a task to complete, such as following up with a contact or making sure to send out the samples your customer

asked for. Salesforce will notify you when the task gets close to the due date, so you are reminded to complete the task.
- You can relate it to an account, an opportunity or a variety of different Salesforce record types.

Logging a Call

- Use the **Log a Call** task to capture and save notes you may need based on the different people you're working with so that no information gets lost in between meetings or conversations.

Send an Email

- Send an email to someone directly through Salesforce.
- It will still come from your email.

NAVIGATING SALESFORCE REPORTS

Head over to your Reports tab. On the left side are all the report folders. Most agencies have a folder with their own specific reports.
In the middle of the screen, it will show you any recent reports you've viewed. You can sort it by name or date, see the folder where it is located, and who created the report.

This is looking at how many quotes have been created this year, by month, by Job Type.

This report is **grouped** by **Created Date** and by **Job Type.** After these groupings is the detailed data. If you only want to see a summary, press **Hide Details** Button. If you want the details to reappear, press **Show Details.**

Exporting a Report

- If you want the report to look exactly like it is in the SF web page, click **Printable View**.
  - This will not include any data/details that are hidden.
- If you want all the data, click **Export Details.**

- This export will be a basic excel spreadsheet with no formatting but contains all the data including the details.

Scheduling a Report

- A report can be scheduled to run so you can receive it as frequently as every day.

FINAL REMINDERS

The better data put into the system, the better information we can get out of it. Reach out to quotedesk@deltafaucet.com if you:

- Need help merging/cleansing data and records
- Need a report built
- Have an idea for an improvement or enhancement to the system
- Run into any problems or errors with the system
- Have any questions regarding Salesforce

You can get additional help, receive training, take tutorials, get certified, learn about best practices, and find user guides at https://trailblazer.salesforce.com/.

For questions on Salesforce training, contact TradeDigitalRoadmap@deltafaucet.com.

For questions about the Quoted Orders process, reach out to your project sales manager.