SFDC - Logging Events

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Events in Salesforce are forward-looking activities that represent scheduled meetings, such as conferences, trade shows, or meetings. Events can be logged before they happen and will appear in the Upcoming & Overdue section until the start time. Once the event starts, it will move to the Past Activities section.

Steps to Log Events

1. Ensure SFDC it linked via outlook (see Internal KB Instructions Add Salesforce Add-in to Outlook)
2. Review how to log events in SFDC directly to an opportunity via the web application and through outlook via outlook plug-in
3. Use the selection criteria below for **Type** to ensure proper marking of the event type conducted

Event Type Selections and Descriptions

Event Types	Product	Definition
Discovery Call – Net New	Net New SO, MG, AB	Discovery call with net new prospect
Discovery Call – SO Upsell	SO	Discover call with existing SedonaOffice customer for an add-on module or integration
Discovery Call – MG Upsell	MG	Discover call with existing Managely customer for an add-on module, integration or tier upgrade
Discovery Call – SO to MG Migration	MG	Discover call with existing SedonaOffice customer for potential move to Managely
Discovery Call – AB to MG Migration	MG	Discover call with existing AlarmBiller customer for potential move to Managely
Account Review – SedonaOffice	SO	Account Review with existing SedonaOffice customer (can turn into future discovery call based on areas of focus discussed)
Account Review – AlarmBiller	AB	Account Review with existing AlarmBiller customer (can turn into future discovery call based on areas of focus discussed)
Account Review – Managely	MG	Account Review with existing Managely customer (can turn into future discovery call based on areas of focus discussed)

Scoping Call – Custom Development	All	Scoping call with customer or internal on customer funded development project
Scoping Call – Professional Services	All	Scoping call with customer on professional services engagement
CSAT – Managely	MG	Customer satisfaction call for Managely (issues related to product, billing, onboarding, support, sales, etc)
CSAT – SedonaOffice	SO	Customer satisfaction call for SedonaOffice (issues related to product, billing, onboarding, support, sales, etc)
CSAT – AlarmBiller	AB	Customer satisfaction call for AlarmBiller (issues related to product, billing, onboarding, support, sales, etc)
Closing Meeting	SO, AB	Last meeting where final terms has been negotiated and we are walking through DocuSign with expectation of signature
Kick-Off Call	All	Kick off call post execution of agreement with customer and PM
Post Demo Meeting	All	Internal - Internal meeting post demo with internal stakeholders
SO - 1st Demo	SO	Net New - 1st product demonstration of the SedonaOffice application
SO - 2nd+ Demonstration	SO	Net New - 2nd+ product demonstration of the SedonaOffice application
SO - Add-On Module Demo	SO	Existing - Demonstration of add-on module or integration for SedonaOffice
Misc	All	Any meeting outside of event types listed
MG - 1st Demo	MG	Net New - 1st product demonstration of the Managely application
MG - 2nd + Demo	MG	Net New - 2nd+ product demonstration of the Managely application
MG - Add-On Modules Demo	MG	Existing - Demonstration of add-on module or integration for Managely

MG - Closing Call	MG	Last meeting where final terms has been negotiated and we are walking through DocuSign with expectation of signature
MG - Proposal Review	MG	Review proposal w/ prospect

Reporting

Reports for event activity will be driven in the reps individual reports and LT meeting reports so it is critical these activities are logged daily/weekly.

Reports w/ Event Dashboards

- BM Sales Manager
- Individual Dashboards for Account Reviews
- BM Sales - KPI and CFQ OKR

Best Practice Tips and Tricks

1. Block off 30 minutes two days a week dedicated to logging all event for the current week.
2. Review your personal dashboard weekly to ensure proper logging and no redundancy in tracking.
3. Ensure you are logging only completed events.

FAQs

Q: Who do I reach out to if I am having issues linking SFDC to Exchange?

A: Submit to EC IT help desk

Q: What if there is an event I feel needs to be tracked and it isn't listed?

A: Email your manager with the event name and justification to add to it can be submitted to sales ops for inclusion

Q: What do I do if an event is canceled?

A: Delete the event from SFDC or modify the dates for the adjusted event time/date.