

Abstract

QuickSuccess, from Christensen/Roberts Solutions, is a combination of tools and services designed to make Salesforce “smarter” and easier to use. With **QuickSuccess** you can equip your sales reps and other users with the just-in-time, on-demand knowledge and assistance they need to quickly adopt and master your Salesforce configuration.

QuickSuccess walks users through their tasks with a minimum of error and effort, giving them the precise knowledge and guidance they want at the precise time they want it. That allows them to learn while doing their tasks, so they learn faster, forget little, avoid errors, and have more time to spend on their core job responsibilities. Some tasks can also be automated to make your users even more efficient.

Description

Use **QuickSuccess** to offer your users three powerful forms of support:

- The **QuickSuccess Advisor** (context-sensitive cue cards and tool tips for any fields injected onto Salesforce pages) guides and coaches users through their key tasks at the precise moment they are doing the work.
- The **QuickSuccess Accelerator** (automated widgets and wizards) speeds users through repetitious, tedious and/or unnecessarily complex tasks, saving time and eliminating mistakes.
- The **QuickSuccess Director** (hands-on task flow assistance and error prevention) proactively monitors and controls users' progress through the key tasks, enforcing best practices and business rules and ensuring that even novice users can successfully and efficiently complete their tasks, from beginning to end, without any prior training.

Highlights

No custom objects or web tabs.

Requirements

Internet Explorer 5.5 or greater; Windows 2000 or greater.
Works with Enterprise, Developer, Professional, and Team editions

Features & Benefits

QuickSuccess enables you to:

- Accelerate your initial Salesforce rollout and buy-in.
- Get new users up to speed quickly following turnovers.
- Reduce formal training courses and eliminate the need for refresher training and training on updates.
- Reduce errors and your users' dependence on others for help.

Quickly create the support you want your users to have:

- You enter the content knowledge with easy-to-use templates; C/RS makes it context-sensitive to your unique version of Salesforce.
- Create robust support with links to any web-based resource.
- Users get the guidance they need when they need it with single-click access via the **QuickSuccess** toolbar.

Customization

Customization is easy: You customize Salesforce and the just-in-time assistance you want to deliver. C/RS connects the two and makes the support available to user on-demand.

Enhancements

A broad range of support tools and capabilities can be custom-developed to meet your organization's particular needs. Periodically, new features will be added to the core QuickSuccess offerings.

QuickSuccess is also available in a special option package for nonprofit organizations in conjunction with the Salesforce Foundation.

Specifications

Publisher

Christensen/Roberts Solutions

Type

Client

Salesforce.com Certification

Done

Pricing

See <http://www.crsol.com/quicksuccess> for pricing on standard and nonprofit options

Screenshot

ActiveGuide ▾
Salesforce Support

Home
Accounts
Contacts
Documents
Reports

Search

Go!

Limit to items I own

Advanced Search...

Create New... ▾

Account Edit
New Account

Save
Save & New
Cancel

Account Information

Account Owner	Ray Walsh	Account Name	<input style="width: 95%;" type="text"/>
Account Record Type	Household	Parent Account	<input style="width: 95%;" type="text"/>

Address Information

Copy Billing Address to Shipping Address

Billing Street	<input style="width: 95%;" type="text"/>	Shipping Street	<input style="width: 95%;" type="text"/>
Billing City	<input style="width: 95%;" type="text"/>	Shipping City	<input style="width: 95%;" type="text"/>
Billing State/Province	<input style="width: 95%;" type="text"/>	Shipping State/Province	<input style="width: 95%;" type="text"/>
Billing Zip/Postal Code	<input style="width: 95%;" type="text"/>	Shipping Zip/Postal Code	<input style="width: 95%;" type="text"/>
Billing Country	<input style="width: 95%;" type="text"/>	Shipping Country	<input style="width: 95%;" type="text"/>

Household Information

Will Give To	<div style="border: 1px solid #ccc; padding: 2px;"> Available Aging Arts </div>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<div style="border: 1px solid #ccc; padding: 2px;"> Selected </div>
Will Not Give To	<div style="border: 1px solid #ccc; padding: 2px;"> Available Aging Arts </div>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<div style="border: 1px solid #ccc; padding: 2px;"> Selected </div>

Description Information

Best Practices

Click and Drag here.

Searching First

- Before creating a new household account, perform a quick search to ensure that the record doesn't already exist. Reducing data duplication is important for data quality, reporting and usability.
- To perform a Search, follow these steps:
 - On any tab, in the top of the left navigation area, a Search box exists.
 - Enter keywords. (Examples: Smith or John Smith) Note: Begin with a wide search

OK

Account Name

Name of the household, a grouping of members. Enter text. Use proper capitalization. (Examples: John and Mary Jones Household, Marilyn Smith Household)