

Salesforce Account Information

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Account **Royal Foods**
Printable View | Customize Page | Edit Layout | Help for this Page

Contacts (0) | Open Activities (0) | Activity History (0) | Opportunities (0) | Cases (0) | Partners (0) | Notes & Attachments (0)

Account Detail Edit Delete Sharing

Double-click any field below to edit its value [Tell me more!](#) [Don't show this message again](#)

Account Owner	Jonathan Luzader [Change]	Phone	(555) 555-5555
Account Name	Royal Foods [View Hierarchy]	Fax	
Parent Account		Website	http://www.royalfoods.com

Additional Information

Type	Customer	Employees	
Industry	Food & Beverage	Annual Revenue	
Description	IT consulting for Tasty Treats		

Address Information

Billing Address	Shipping Address
-----------------	------------------

System Information

Created By	Jonathan Luzader, 10/26/2009 4:41 PM	Last Modified By	Jonathan Luzader, 10/26/2009 4:59 PM
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Custom Links

Google Search	Google Maps	Google News
Hoovers Profile		

Edit Delete Sharing

Contacts New Contact Merge Contacts [Contacts Help](#)

No records to display

Open Activities New Task New Event [Open Activities Help](#)

No records to display

Activity History Log A Call Mail Merge Send An Email [Activity History Help](#)

No records to display

Opportunities New Opportunity [Opportunities Help](#)

No records to display

Cases New Case [Cases Help](#)

No records to display

Partners New [Partners Help](#)

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Custom Links

Messages and Alerts

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Jonathan Luzader at Penn State University Discover Winter '10

Monday, October 26, 2009

Dashboard [Refresh](#) [Customize Page](#)

As of 10/26/2009 4:30 PM

Users Logged In

Last 7 Days

Sum of Active

Completed Activities

Last 30 Days

Assigned	Record Count

Information Added to Salesforce

of Accounts

October 2009
Created Date

My Tasks [New](#) This Month ▼

Complete	Date	Subject	Name	Related To
X	10/28/2009	Phone Call		Jan Mahar

Calendar [New Event](#) [Calendar Help](#) ?

Friday 10/30/2009

5:00 PM - 6:00 PM [Meeting \(IST Building\) : Penn State](#)


◀ **October 2009** ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	01	02	03
04	05	06	07	08	09	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31


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Salesforce Leads



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 **Lead Grant Michael**
Printable View | [Customize Page](#) | [Edit Layout](#) | [Help for this Page](#) 

[Open Activities \(0\)](#) | [Activity History \(0\)](#) | [HTML Email Status \(0\)](#) | [Campaign History \(0\)](#)

Lead Detail [Edit](#) [Delete](#) [Convert](#) [Clone](#) [Find Duplicates](#)

 Double-click any field below to edit its value [Tell me more!](#) [Don't show this message again](#)

Lead Owner	Jonathan Luzader [Change]	Lead Status	Open
Name	Grant Michael	Phone	
Company	SPE Consulting	Email	grant.michael@gmail.com
Title	Senior Software Architect	Rating	

Address Information

Address	Website
---------	---------


Additional Information

No. of Employees	Lead Source
Annual Revenue	Industry
Description	Senior software design
Created By	Jonathan Luzader, 10/26/2009 4:56 PM
Last Modified By	Jonathan Luzader, 10/26/2009 4:56 PM


Custom Links

Google Search	Google Maps	Send Gmail
Google News	Hoovers Profile	


[Edit](#) [Delete](#) [Convert](#) [Clone](#) [Find Duplicates](#)

Open Activities [New Task](#) [New Event](#) [Open Activities Help](#) 


No records to display

Activity History [Log A Call](#) [Mail Merge](#) [Send An Email](#) [Activity History Help](#) 

No records to display

HTML Email Status [Send An Email](#) [HTML Email Status Help](#) 

No records to display

Campaign History [Add to Campaign](#) [Campaign History Help](#) 

No records to display

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Salesforce Opportunities

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Opportunities Home

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Recent Opportunities Recently Viewed

Opportunity Name	Account Name	Close Date
Jan Mahar	Penn State	11/6/2009

Reports

- [Opportunity Pipeline](#)
- [Stuck Opportunities](#)
- [Closed Opportunities](#)
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Tools

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Quarterly Summary

Interval: Current FQ

Include: All Opportunities

Chart Type: none

[Run Report](#)

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Recent Items

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Quick Create

*Opportunity Name

Account [🔍](#)

*Close Date [10/26/2009]

*Stage --None--

Amount

[Save](#)

Salesforce Reports

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10

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Sample Report
of Accounts
Help for this Page ?

Report Generation Status: Complete

Report Options:

Summarize information by: Created Date

Summarize information by: --None--

View: All accounts

Time Frame

Columns: Created Date

Duration: Custom

Start Date:

End Date:

Run Report
Hide Details
Customize
Save
Save As
Delete
Printable View
Export Details

Generated Report:

Filtered By: ((1 AND 2)) [Edit](#)

1. Created Date greater or equal 10/1/2009
2. Created Date less than 11/1/2009

Account Owner	Account Name	Type	Last Activity	Last Modified Date	Billing State/Province
<input type="checkbox"/> Created Date: October 2009 (6 records)					
Jonathan Luzader	Acme	Prospect	-	10/26/2009	NY
Jonathan Luzader	salesforce.com	Customer	-	10/26/2009	CA
Jonathan Luzader	Global Media	Prospect	-	10/26/2009	Ontario
Jonathan Luzader	Penn State	Customer	10/30/2009	10/26/2009	-
Jonathan Luzader	Royal Foods	Customer	-	10/26/2009	-
Jonathan Luzader	Tasty Treats	-	-	10/26/2009	-
Grand Totals (6 records)					

Check rows above to filter to just those rows, then drill down by: --None-- [Drill Down](#)

Salesforce Dashboard



Salesforce Dashboard

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Users Logged In

Last 7 Days

Sum of Active

Total # of Active Users: 1

Login Leaderboard

Last 7 Days

Username	Record Count
jon.luzader@gmail.com	1

Login Wall of Shame

Last 7 Days

Active	Sum of Active

Completed Activities

Last 30 Days

Assigned	Record Count

Open Tasks

Last 30 Days

Assigned	Record Count
Jonathan Luzader	1

of Custom Reports Created

Last 30 Days

Created By	Record Count
Jonathan Luzader	51

of Custom Reports Modified

Last 30 Days

Last Modified By	Record Count
Jonathan Luzader	51

Information Added to Salesforce

of Accounts

of Contacts

of Task and Activities

of Reports

Responsibility Assignment Matrix for CRM, Logistics and Compliance Management

WBS
Activities
OBS Units

→	3.1	3.2	3.3	3.4	3.5	3.6	3.7	3.8	3.9	3.10	3.11	3.12	3.13	3.14	3.15	3.16	3.17	3.18
Project Manager		R P									R		R P	R			R	
Network Specialist	P			R	R						P							R P
Network Tester					P			R P		P	P							
Network Installation Specialist				P														
Network Security Specialist				P	P													
Business Specialist											P	P		P	P			
Business Analyst												P					P	
Research Assistant	P														P			
Financial Analyst								R P					P					
Technology Specialist												R P			R P			R P
Technical Installation Specialist			R P									P						P
Hardware Specialist									R P								P	
Wireless Implementation Specialist			R P						R P	R P								P
Software Specialist	R					R	R		R P		P	R	R P	P	R P	R	R P	
Database Programmer	P					P						P						
ERP Integration Specialist						P	P			R P						P		
SaaS System Specialist						P						P	R P			P	P	

Key:

R = Responsible organizational unit
P = Performing organizational unit