Bloomfire Getting Started with Salesforce

A Guide for New Sales Representatives

Policy Owner	Information Security & IT Governance
Effective Date	January 1, 2026
Last Reviewed	April 2026
Next Review Date	October 2026
Applies To	All employees, contractors, and vendors with company-issued hardware
Related Documents	Data Classification Policy | Remote Work Policy | BYOD Policy

Welcome

Welcome to the team! Salesforce is the organization's primary CRM (Customer Relationship Management) platform and will be your central workspace for managing leads, contacts, accounts, opportunities, and customer communications. This guide is designed to get you up and running with the most essential tasks in your first two weeks.

Tip:

Bookmark this article and refer back to it during your first month. The linked resources at the bottom of each section will take you deeper once you are comfortable with the basics.

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Step 1: Log In for the First Time

1. Open your browser and go to login.salesforce.com.
2. Enter your company email address and the temporary password sent to you by IT on your first day.
3. You will be prompted to set a new password. Follow the password requirements shown on screen.
4. Complete the MFA (Multi-Factor Authentication) setup using the Salesforce Authenticator app or your preferred authenticator. IT has step-by-step instructions at it.yourcompany.com/sf-mfa.
5. After logging in, confirm you are in Lightning Experience (not Salesforce Classic). If the interface looks outdated, click your profile picture in the upper right and select Switch to Lightning Experience.

Step 2: Understand the Dashboard

The Salesforce home screen contains several key areas you will use daily:

Area	Purpose
App Launcher (grid icon)	Switch between Salesforce apps (Sales, Service, etc.)
Global Search Bar	Find any record — accounts, contacts, opportunities, leads
Navigation Tabs	Quick access to your most-used objects (Leads, Accounts, etc.)
Home Dashboard	View your pipeline, tasks, and recent activity at a glance
Activity Feed	See updates on accounts and opportunities you follow

Step 3: Know the Difference Between Leads and Contacts

1. This is one of the most important distinctions for new reps:
2. A Lead is an unqualified prospect — someone who has shown interest but has not yet been vetted. Leads live separately from your main database.
3. A Contact is a qualified individual associated with an Account (a company or organization). Once you qualify a lead, you convert it, which creates a Contact, Account, and Opportunity.
4. Never manually create a Contact for a new prospect — always start with a Lead and convert it once qualified.

Note This policy is reviewed semi-annually. Employees will be notified of material changes via email and are expected to review and acknowledge the updated policy within 10 business days of notification.

Step 4: Log Your First Activity

1. Navigate to a Lead or Contact record by searching their name in the Global Search Bar.
2. On the record page, scroll to the Activity section on the right side of the screen.
3. Click Log a Call (for phone calls) or New Task (for follow-up items).
4. Fill in the Subject, Date, and Notes fields with details of the interaction.
5. Click Save. The activity will now appear in the record's timeline.

Step 5: Update an Opportunity Stage

1. Navigate to your Opportunity record.
2. Click the current Stage in the opportunity pipeline (shown near the top of the record).
3. Select the appropriate stage from the dropdown. Refer to the Sales Stage Definitions article for guidance on when to move an opportunity.
4. Update the Close Date if needed and click Save.

Your Next Steps

Now that you have completed the basics, explore these articles to build on your knowledge:

- How to Create a New Opportunity from a Converted Lead
- Understanding Pipeline Stages and Forecasting Categories
- How to Send Emails Directly from Salesforce
- Using Salesforce Reports to Track Your Activity
- How to Use Salesforce on Mobile

Getting Help

- Sales Enablement Team: salesenablement@company.com | #sales-tools on Slack
- IT Service Desk (for login/access issues): helpdesk@company.com | ext. 5000
- Salesforce Help Documentation: help.salesforce.com
- Live Training Sessions: Check the Learning Portal for the next new hire Salesforce workshop