

# RETAILER PORTAL

## QUICK REFERENCE GUIDE



### GETTING STARTED

#### Logging On

1. Navigate to [www.salesforce.com](http://www.salesforce.com) in your internet browser.
2. Click on Customer Login.
3. Type in User Name and Password and click Login.



### ACCOUNTS

#### Accessing Accounts

1. Click on the **Accounts** Tab
2. From the view menu, Select **All Accounts**
3. In the **Recent Accounts** section your Account Name will appear
4. To Access the details of your Account, click on the **Account Name**

#### Reviewing Account Details

1. Remember to always update the following:
  - a. Address, Email, Fax & Phone Number
  - b. Current Showroom Displays
2. Ensure that your **fabricator has entered warranty registrations for DuPont Surfaces jobs** so that you can accumulate your counter partner points. This will ensure that your **Counter Partner Redemption Points are accurate**



### CONTACTS

1. Click on the **Contacts** Tab
2. From the view menu, Select **All Contacts**
3. In the **Recent Contacts** section your Contact Name will appear
4. To Access the details of your Contact, click on the **Contact Name**



### LEADS

#### Accessing leads

1. Go the **Leads Home Page**
2. Select **My Leads** from the View drop down menu
3. Click on the **Lead name** to access the Lead detail information

#### Updating Lead Records

1. Click on the **Lead Name**
2. At the top of the **Lead Record**, click **Edit**
3. Update the following fields:
  - a. Lead Status
  - b. Project Timeline
  - c. Product Interest
4. Click **Save** when finished.



### MARKETING RESOURCES

1. Click on the **Marketing Resources Home** Tab
2. This will give you access to customizable promotion material including national advertising materials and material for countertops 1-2-3 and our Counter Partners program, and photography








*Note: The difference between this tool and Digital Asset Manager is user friendliness and ease of access (your password does not expire and customization is easy)*

#### Using Ask the Expert

1. Click on the **Ask the Expert** Tab
2. To read a Topic, click on it
3. To post a new topic, click the **New Topic** Tab and hit **Save**
4. To edit your post, click the **Edit** Tab
5. To quote some else's reply in your response, click **Quote**
6. To save topics to Favorites, click the **Add to Fav.** Tab
7. To delete a topic, select the topic and click and confirm delete
8. Use the **Search** Tab, to search for topics

*Note: Ask the Expert will be checked daily by DuPont; security and governance rules apply. See Playbook for details.*

#### Using Counter Partners





1. To download, an item select the item you want to download and then click the  icon below it
2. To email a file, click the  icon below it
3. To create a forum topic, based on an item, click the  icon below it
4. For more info about the item (file size, type etc) click the  icon below it
5. Click on the  icon, to preview video clips
6. To view video clip storyboards, click the  icon below it
7. To customize promotional materials, follow the steps below:
  - a. Click the  icon below the item; a new

window will open with the item

- b. To add a logo, click on the **Logo** button in the new window
  - i. If you do not have a logo, click the **No logo** button
  - ii. If you have a logo, click the **I have my own image** link; click the **Browse** button to select the image from your hard drive. Once you have selected the image, click **Submit**
- c. Similarly, to add an address box, click on the **Address Box** button in the new window
  - i. Enter your address info in the **Address Box**
  - ii. The alignment of the Address Box and size of the text can also be customized

*Note: Image description will highlight whether the item is customizable*

#### Using Photo Gallery

1. To sort assets, click the  icon;
2. To show asset navigation, click the  icon
3. To switch to table view, click the  icon
4. To view images as a list, click the  icon

#### What's New

This section will call out new additions to Marketing Resources or new Counter Partner programs



### CP REDEMPTION FORM

Available under **Document Gallery** in **Marketing Resources**



### SHOWROOM DISPLAY INFO

To Update Showroom Display Information, click on the **Accounts** Tab on the SalesForce Home Page

1. Click on your **Account Name** and scroll down to **Current Showroom Display** and click **Edit**
2. Select **Display Type, Product and Color** from the drop down menu and click **Save**



### MISCELLANEOUS

1. To preview, items available for order through distributors click **Document Gallery** in **Marketing Resources**
2. To order samples, click on the **Order Samples** Promo Box
3. Links/Promo Boxes: Surfaces Website, Consumer Financing Offer, Retailer Newsletter Archive
4. To access other training materials (Playbook/PPT), click here: [http://www2.dupont.com/Surfaces/en\\_US/partners.html](http://www2.dupont.com/Surfaces/en_US/partners.html)