

2023 Thermal Audit
– Portal and SFDC Entry Training



Campaign name in SFDC: 2023 Thermal Audit Program
(Please make sure each audit entry is tied to this specific campaign in SFDC)

Thermal Audit Entry and Close

Step 1

Distributor or Sales Rep Enters Opportunity in TA entry form – up to 10 audits per entry

Step 2

Review/Update the Created Opportunity for Credit in SFDC

Step 3

Close the Opportunity in SFDC

Covers up to 10 audits per entry

Done by sales or Distributor rep

Done by DSO/ Rep sales

Done by DSO/Rep sales

Fill out the form/SFDC correctly to ensure you get credit for your audit

STEP 1: Distributor or Sales Rep Enters Opportunity in Portal

[Link to the 2023 Thermal Audit Submission Form](#)

1. Pick a region

1

Please select thermal audit region*

United States Mexico South America
 Canada Central America

2. Sales Rep Info

2

Fill in the following information for the nVent HOFFMAN Sales Rep that worked on this thermal audit.

Sales Rep First Name*

Sales Rep Last Name*

Sales Rep Email*

Was a distributor involve in the audit?*

Yes No

3. Distributor Rep Contact Info

3

Distributor Company Name*

Distribution Rep First & Last Name*

Distribution Rep Email address*

4. # of audits from the same customer location: **Up to 10**

4

Number of audits*

Name of the Opportunity*

Name of the opportunities: Separate different machine/oppt names by comma

Be sure to double check email fields for misspellings

STEP 1: Distributor or Sales Rep Enters Opportunity in Portal

5. Customer contact info

(Company name and email address are important)

5

We will not be contacting customers. The information is requested for verification purposes and opportunity tracking.

Customer Company Name*	Coca-Cola
Customer Contact First Name*	Jason
Customer Contact Last Name*	Johnson
Customer Contact Email Address*	jason.johnson@coca-cola.com

6. Populate the Opportunity industry and vertical

6

Please select the industry Customer operates in*

<input type="radio"/> Aerospace	<input checked="" type="radio"/> Automotive	<input type="radio"/> Chemical
<input type="radio"/> Commercial	<input type="radio"/> Datacom	<input type="radio"/> Defense
<input type="radio"/> Downstream	<input type="radio"/> Energy Other	<input checked="" type="radio"/> Food and Beverage
<input type="radio"/> General Electronics	<input type="radio"/> Industrial Other	<input type="radio"/> Infrastructure other
<input type="radio"/> Medical Devices	<input type="radio"/> Oil and Gas	<input type="radio"/> Petrochemical
<input type="radio"/> Pharmaceutical	<input type="radio"/> Power	<input type="radio"/> Rail & Transit
<input type="radio"/> Renewables	<input type="radio"/> Residential	<input type="radio"/> Residential/Commercial other
<input type="radio"/> Telecom	<input type="radio"/> Test and Measurement	<input type="radio"/> Water/Wastewater

7. Upload the pdf file from cooling selection tool

(up to 10 files can be uploaded)

7

Please upload your file here:

Drag files here or click to add file

Submit Now

Up to 10 pdf files can be uploaded in this Thermal Audit Entry Form

STEP 2 - Review/Update the Created Opportunity for Credit in SFDC

The screenshot shows a Salesforce Opportunity record for 'Bottling Station 1 - Coca-Cola'. The record is in the 'Establish' stage. The following fields are highlighted with red boxes, indicating they are auto-populated:

- Opportunity Name: Bottling Station 1 - Coca-Cola
- Opportunity Owner: Sales rep name
- Account Name: Coca-Cola
- Close Date: 13/05/2023
- Stage: Establish
- Probability (%): 25%
- Sales Team: Hoffman

Other visible fields include: Opportunity ID (NV-422607), Account Name (nVent), Close Date (13/05/2023), Amount, Opportunity Owner (Marketo Sync), Stage (Establish), Opportunity Record type (Standard), Agent Account, Amount, Opportunity Currency (USD - U.S. Dollar), Future Potential, Must Win Deal - Level 1 and 2, First Revenue Date (13/05/2023), and BEO Expected Date.

Automatically pre-populated information (from the thermal audit submission form entry)

- Opportunity Name
- Opportunity Owner = Sales Rep entered
- Account Name = Customer Account Name
- Close Date = 3 months from creation
- Stage = 'Establish'
- Probability = 25%
- Sales Team = Hoffman

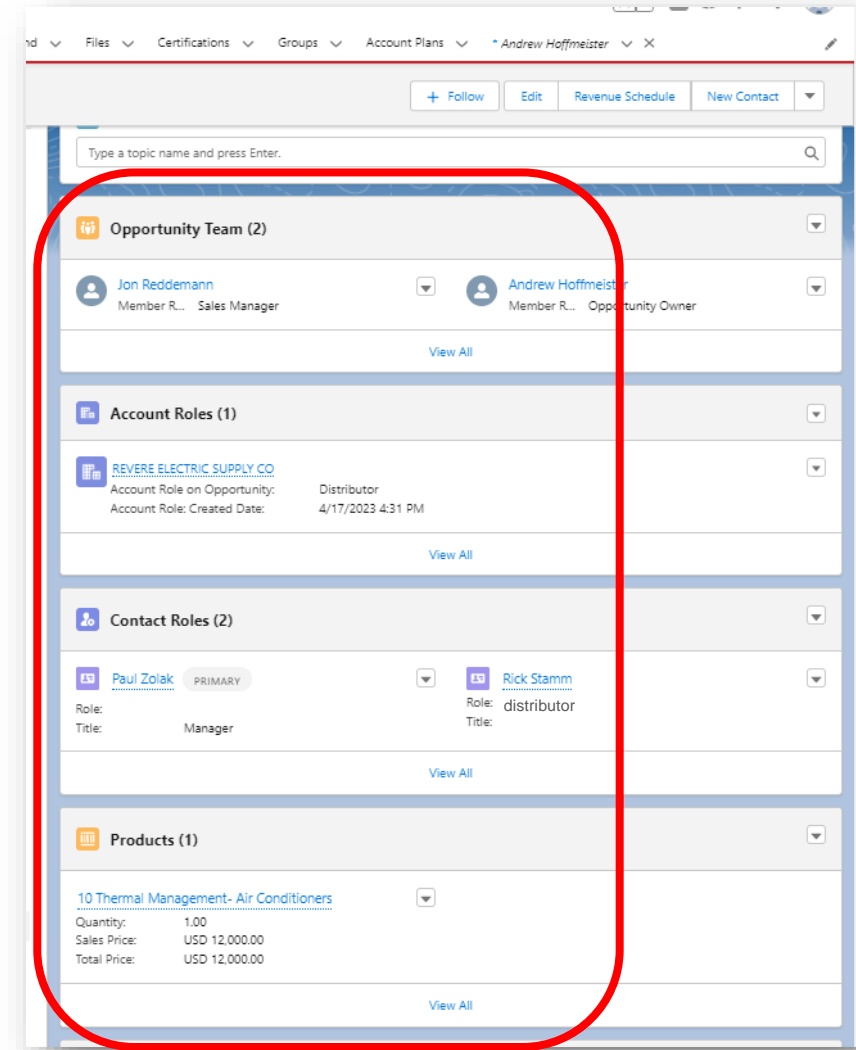
The sidebar shows three sections: Contact Roles (0), Products (0), and Files (0). The 'Products (0)' section is highlighted with a red box.

Just make sure red highlighted fields are auto-populated

STEP 2 - Review/Update the Created Opportunity for Credit in SFDC

Automatically pre-populated information (from the thermal audit submission form entry)

- Opportunity Team – Sales contact
- Account Role – Distributor added based on the Distributor Contact
- Contact Roles – Customer Contact marked ‘primary’
- Contact Roles – Distributor Contact added as ‘Distributor’
- Product – Defaults to “10 Thermal Management Air Conditions”



Just make sure red highlighted fields are auto-populated

STEP 3 - Close the Opportunity in SFDC

Need to change/enter

- Update the Close Date to PO Date
- Change Stage to Closed, and reason why it closed
- Enter PO# in Opportunity Description
- Attach the PO

The screenshot shows the Salesforce interface for an Opportunity record titled "Bottling Station 1 - Coca-Cola". The record details include Opportunity ID (NV-226937), Account Name (Water Gremlin), Close Date (4/15/2021), Amount (USD 0.00), Opportunity Owner (Bob Kalivoda), and Stage (Closed Won). A progress bar at the top indicates the opportunity is in the "Closed Won" stage. The "Details" tab is active, showing various fields. Red boxes highlight the following fields: "Stage" (Closed Won), "Close Date" (7/30/2023), "Opportunity Description" (PO#12345677), and the "Upload Files" button in the "Files (0)" section.

Field	Value
Legacy ID	
Opportunity Name	Bottling Station 1 - Coca-Cola
Standard	
Opportunity Owner	Bob Kalivoda
Account Name	Water Gremlin
Amount	USD 0.00
Opportunity Currency	USD - U.S. Dollar
Close Date	7/30/2023
RFQ Expected Date	
Sales Team Focus	
Project Database	
Opportunity City	
Opportunity State	
Opportunity Country	United States
Stage	Closed Won
Probability (%)	100%
Sales Team	Hoffman
Application	
Update Prim	
Specification	
Channel Dup	
Won/Lost Re	
nVent Expe	
Won/Lost S	
Prior Expe	
Lost to Competitor	
Compliance	
Opportunity	
Water/Wa	
Opportunity	
Winning RFC	
Winning Acc	

You need to follow up the step 3 in order to get credit for the audits

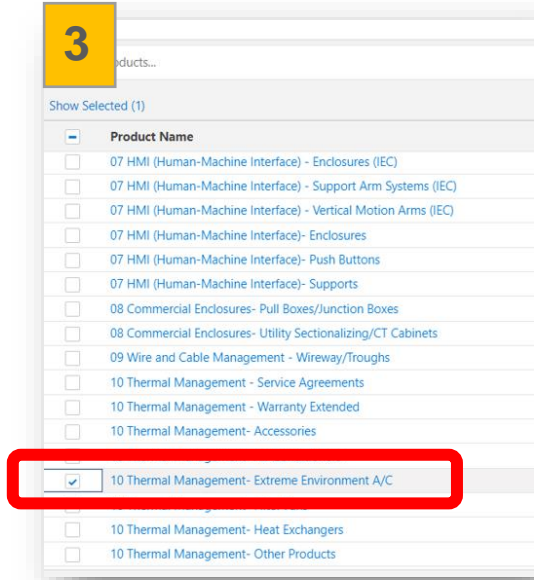
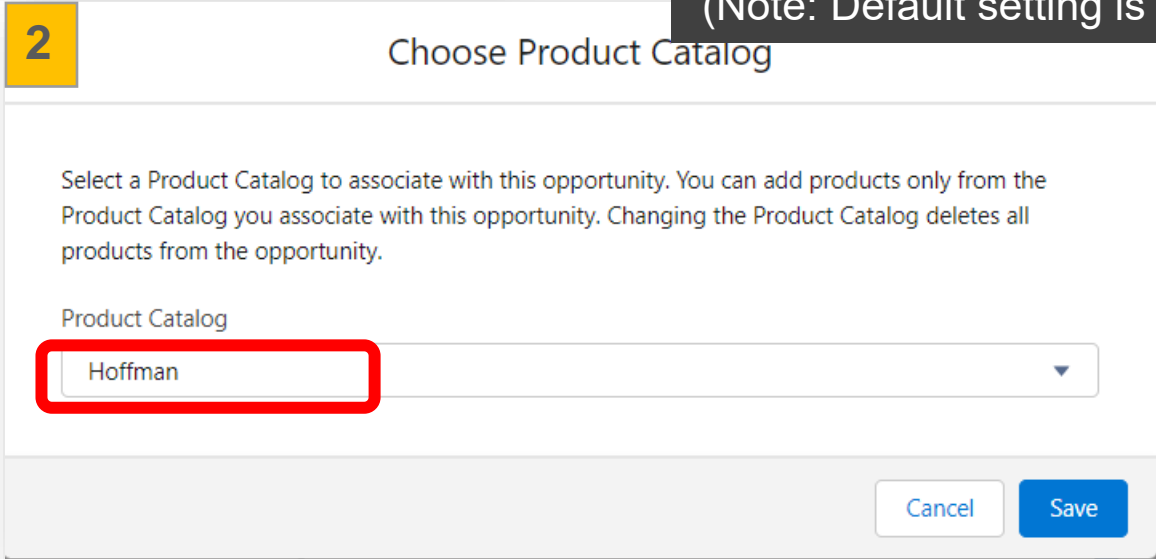
STEP 3 – Additional Step if Sold ‘Extreme Environments A/Cs’ under ‘Products’



Need to change/enter

If sold ‘Extreme Environments A/Cs’ out of this audit, you’ll need to change the product code to ‘10-Thermal Management Extreme Environments A/C’ under ‘Products’

(Note: Default setting is ‘10-thermal management Air Conditioners’)



This step is necessary only if the Extreme Environments A/Cs are sold

Important Notes

- **When filling out the Thermal Audit Entry Form (Marketo form)**

- Double check for misspelling in the email address field
- Make sure to attach the Cooling Selection Tool PDF
- Keep it blank if distributor rep was not involved
- When customer account info showing as 'Unknown' in SFDC
 - Two accounts are existing
 - No accounts are existing

- **When reviewing in SFDC (A must to receive credit for TA)**

- Make sure the "Account Name", Distributor ("Account Role"), and Distributor Rep ("Primary Contact Role") are properly tied to the opportunity
- Update the "Opportunity Amount", update the "Products" field
- Update the "Opportunity Stage". If sold any, change it to "Closed Won"
- Add the PO number to the "Opportunity Description"
- Attach a PO

Make sure to check the errors/misspelling to get credit properly

Questions about

- Thermal Audit Entry Form: Eunjung.baek@nvent.com
- Salesforce entry/error: Bruno.Reinhard@nvent.com