Account – Companies you are pursuing or are engaged with. There is no parent/child relationship for the marketing account structure. Record type and name: Advertising

Contacts – People associated with ‘accounts’ and ‘opportunities’

Opportunity – These are used to capture the business and/or sales process with a current account. There is a parent and child relationship for Advertising Opportunities. The record types, names and relationships are outlined below:

(Parent) Advertising – This is used to capture the sales/business process with the Advertising Account. It will capture the pursuit of a deal/campaign and house the campaign financials, contracts and start and stop dates. It includes functionality that will pass values to the child opportunity as well

(Child) Advertising Location – This represents the business process associated with Amazon Locker locations that will host an Ad placement. While it inherits aspects from the parent opportunity these can be overridden at the child opportunity. For example, if you want to set a ‘Ad Payment’ of $100 per location at the parent opportunity level, this value will pass down to all child opportunity. But at any given child opportunity you can override that amount

Tasks – Tasks can be used as reminders to yourself or teammates. Tasks can be related to account, contact or opportunity. They can also be left unassociated and just as reminders for yourself. There are a number of ways to create a task: Using the activity panel on a record or by using the ‘Task’ head on the menu bar.

Events – Similar to tasks these are specifically used to capture date bound activities such as meetings. And while the ‘event’ functionality does not sync with Outlook, it is still worth while as they are reportable. Furthermore, by using events, you can run analytics on certain event types and their impacts on opportunities.

Account – Companies you are pursuing or are engaged with