# Tasks

## Task 1 - Chatter

Create a "Hello World" Chatter post

On the home screen, locate the 'Chatter' block on the right-hand side.

Click into the 'Share an update' box and type 'Hello World #Marketing.'

Mark the task ‘complete’

## Task 2 - Create an account

Find the 'Account' header in the tab bar.

Click the 'down' arrow and select 'New Account.'

Enter as many fields as you would like, but skip past the 'Contact' field.

Click 'Save.'

Mark the task ‘complete’

## Task 3 - Create a contact

Create a contact by entering the name and email.

Under 'Account,' the account you just created should pop up. If not, start typing and it should appear.

Click 'Save.'

Mark the task ‘complete’

## Task 4 - Add a meeting associated with the contact created in Task 3

Create an event and schedule a "Call" with the contact you just created.

Pick an 'initial due date' of today.

Navigate back to the home page and check the 'Today' section to see your event listed under 'Today's Events.'

Mark the task ‘complete’

## Task 5 - Create an Opportunity

Enter a name for the opportunity.

Enter an 'estimated' close date.

Set the stage to 'Proposal.'

Click into the "Advertising Account" field. If the account you just created doesn't appear, start typing.

Leave all fields under 'Commercials' empty for now.

Click 'Save.'

Mark the task ‘complete’

## Task 6 - Set a task to follow up with legal about a contract

Find the Advertising Opportunity you created and open it.

In the uppermost portion of the right-side panel, click the calendar icon.

Create a 'Meeting' with the subject 'Discuss contract terms.'

Set a future date for that meeting within the next 7 days.

Click 'Save.'

Mark the task ‘complete’

## Task 7 - Construct a list of locations for opportunity

Go to the home page and select 'Quick Links' under the 'Main' section.

Click the hyperlink under the 'Create Deal' task to access an Airtable view with pre-populated records for this test.

Export the list of records as a 'csv' file.

Navigate back to Salesforce and create a Chatter post directed at "Matt Bryan" with the attached csv file.

Mark the task ‘complete’

## Task 8 - Enter the 'commercials' portion of the deal for the Opportunity you created

Open the opportunity.

Click 'Edit.'

Scroll to the 'Commercials' group.

Enter the 'Gross Revenue,' 'Total Production Cost,' and 'Ad Spend.'

Click 'Save.'

Navigate back to the home page and mark the task as 'Complete.'

Check the 'My Dashboard' section of the main page to see the updated opportunity information.

Mark the task ‘complete’

## Task 9 - Move the Opportunity status forward using a new functionality

We will do this in 2 ways

#### Method 1

First, navigate to the Advertising Opportunity that you created earlier. The opportunity stage (show in the chevron bar at the top of the screen) should be in the ‘Proposal’ stage.

Click on the ‘Pending Contract’ stage and select the ‘set as current stage’ button on the right

Once that saves, open any of the below ‘Child Opportunities’ show in the box below the chevron bar. The stage of the location opportunity should have moved corresponding with the status above

Go back to the Advertising Opportunity

Move the stage back to ‘Proposal’ and select the ‘set as current stage button’

#### Method 2

Navigate to the homepage

In the Main View select ‘Opportunities’ to expand the view. You should now see a chart and a list view in this section. List view can be a huge time saver as they let you edit multiple records at once.

Your Advertising Opportunity should be in the list view.

Select the ‘stage’ cell showing the opportunity in the ‘Proposal’ stage

Change the stage to “Ad Prep’ and hit ‘save’

Once that saves, hit the ‘refresh’ icon on the adjacent chart

This chart represents all of the Advertising Locations associated with the corresponding Advertising Opportunity.

## Task 10 - Lets use a report to send to our Vendor of upcoming locations

Navigate to the homepage

click the link to 'Upcoming Unwraps'

Once Loaded, select the down arrow next to 'Save As' and select 'Subscribe' from the drop down

Set the subscription options:

Cadence - Daily, Weekly, Monthly

Attach File

Select 'Save'

Next, just so you have a current copy, press the down arrow next to save as again but this time select 'Export'

Select the export options (personally i always use 'Details Only' and format '.csv')