Salesforce Certified Admin and App Builder

Lesson 18—Sales Cloud

simplilearn

What You'll Learn

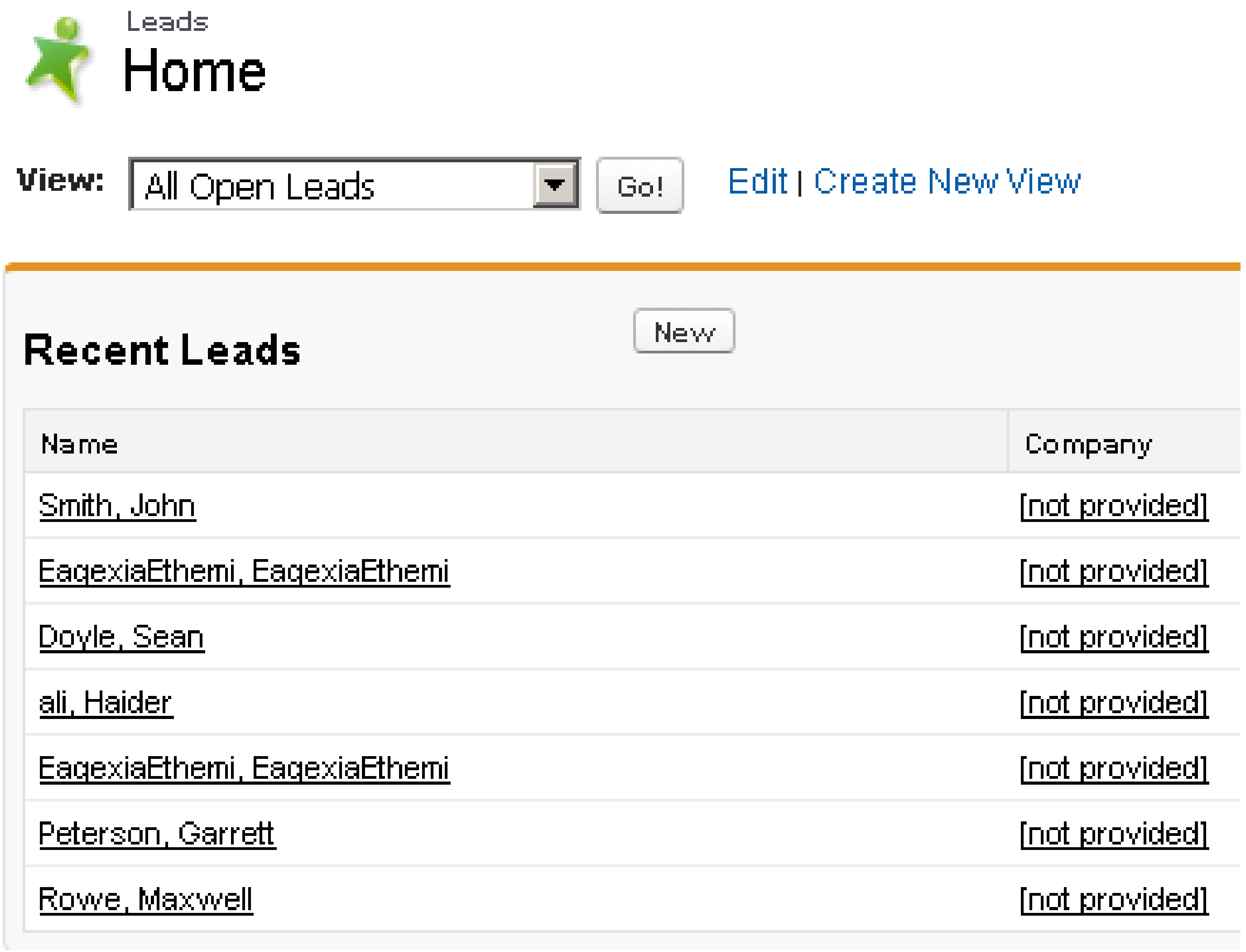
- Creating and converting leads
- Creating accounts, contacts, and email templates
- Creating Price Books, products, opportunities, and activities
- Creating a web-to-lead form and leading assignment rules
- Creating campaigns

Leads Home Page

Leads Home Page

The leads home page is used to:

- Import Leads
- Transfer Leads
- Mass Email Leads
- Mass Add Leads to Campaign

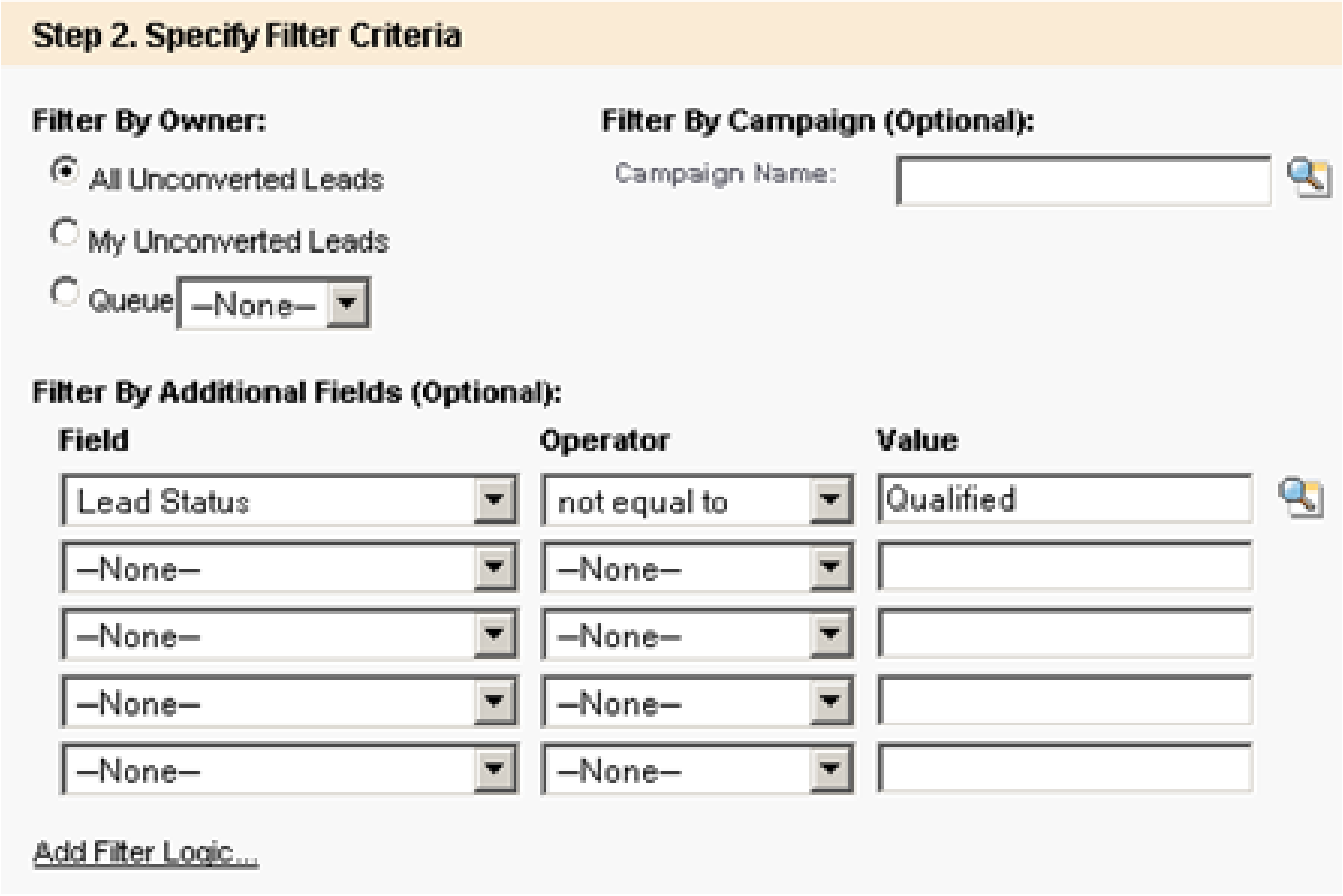


Creating List Views

Creating List Views

Following are the features of list view:

- Quickly access lists based on type and criteria
- Filter based on campaign and ownership
- Control security through roles and groups
- Use up to ten rows of filter criteria
- Create advanced logic grouping of criteria
- Drag-and-drop columns to re-order
- Sort on columns
- Make changes to data directly from the list

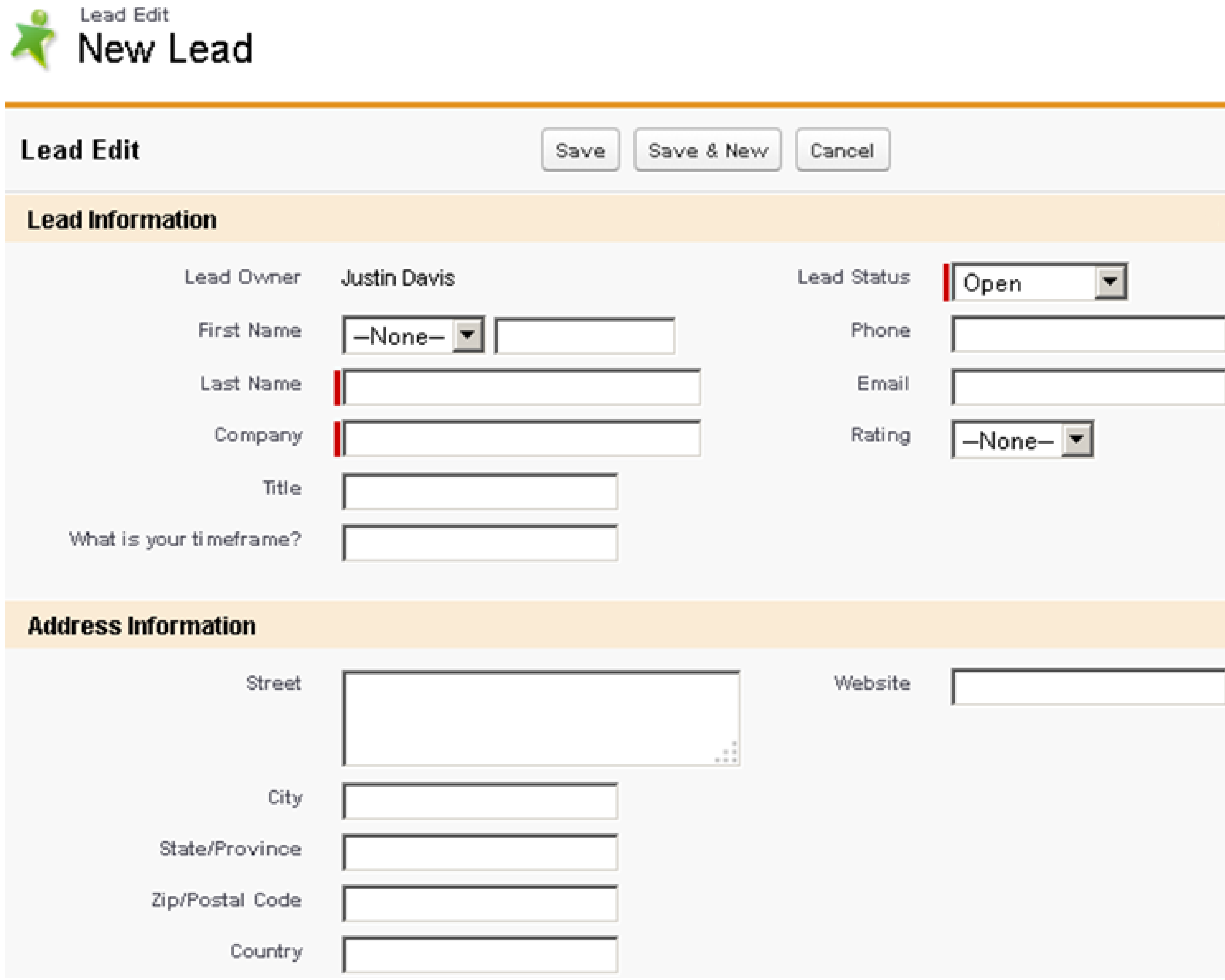


Creating and Converting Leads

Creating and Converting Leads

Following are the overview of the leads page:

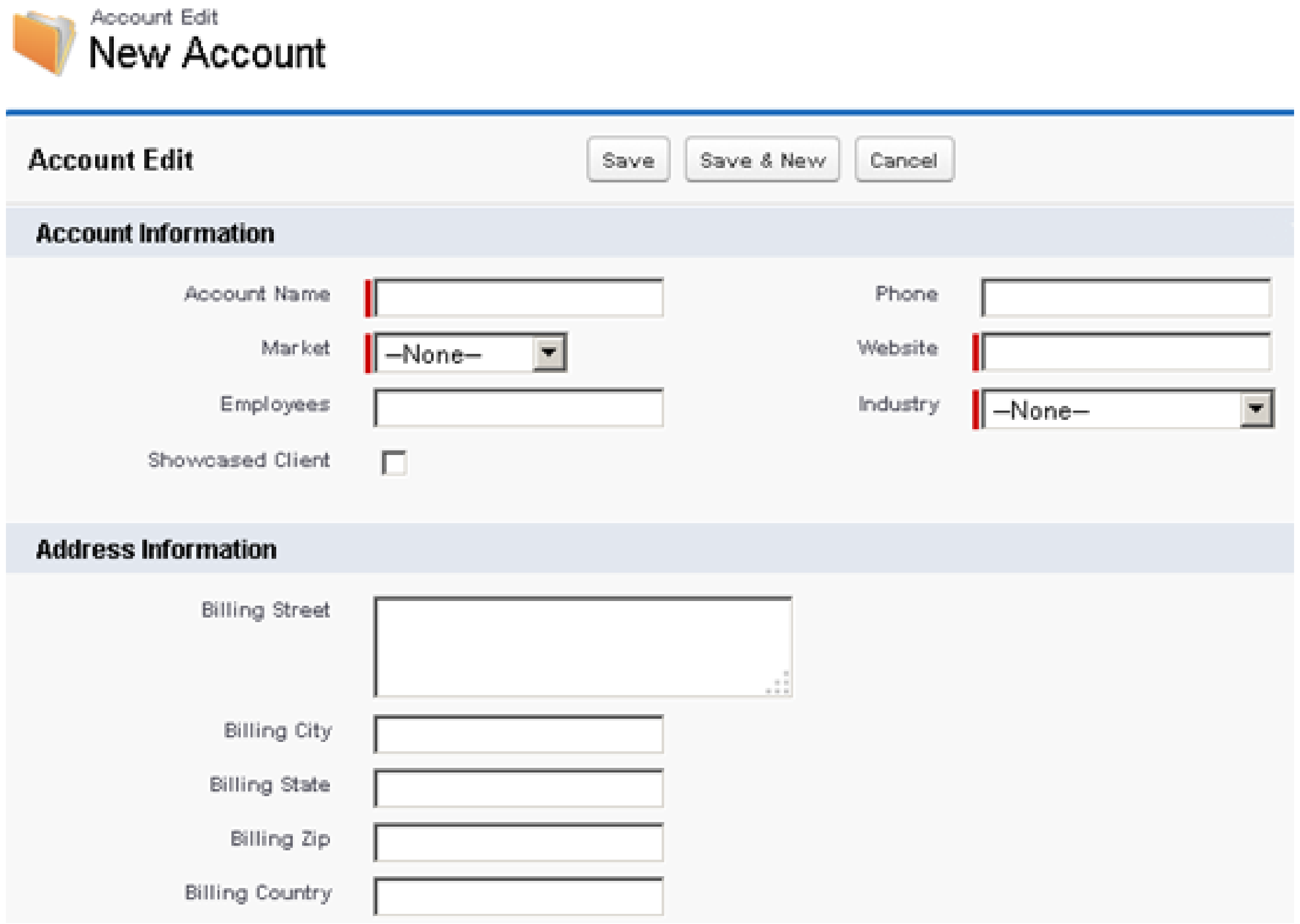
- Create a record for prospective customers
- Log initial activities such as cold-calls
- Create notes on conversations
- Holding area for mass marketing tools



Creating Accounts

Following are the features of an account:

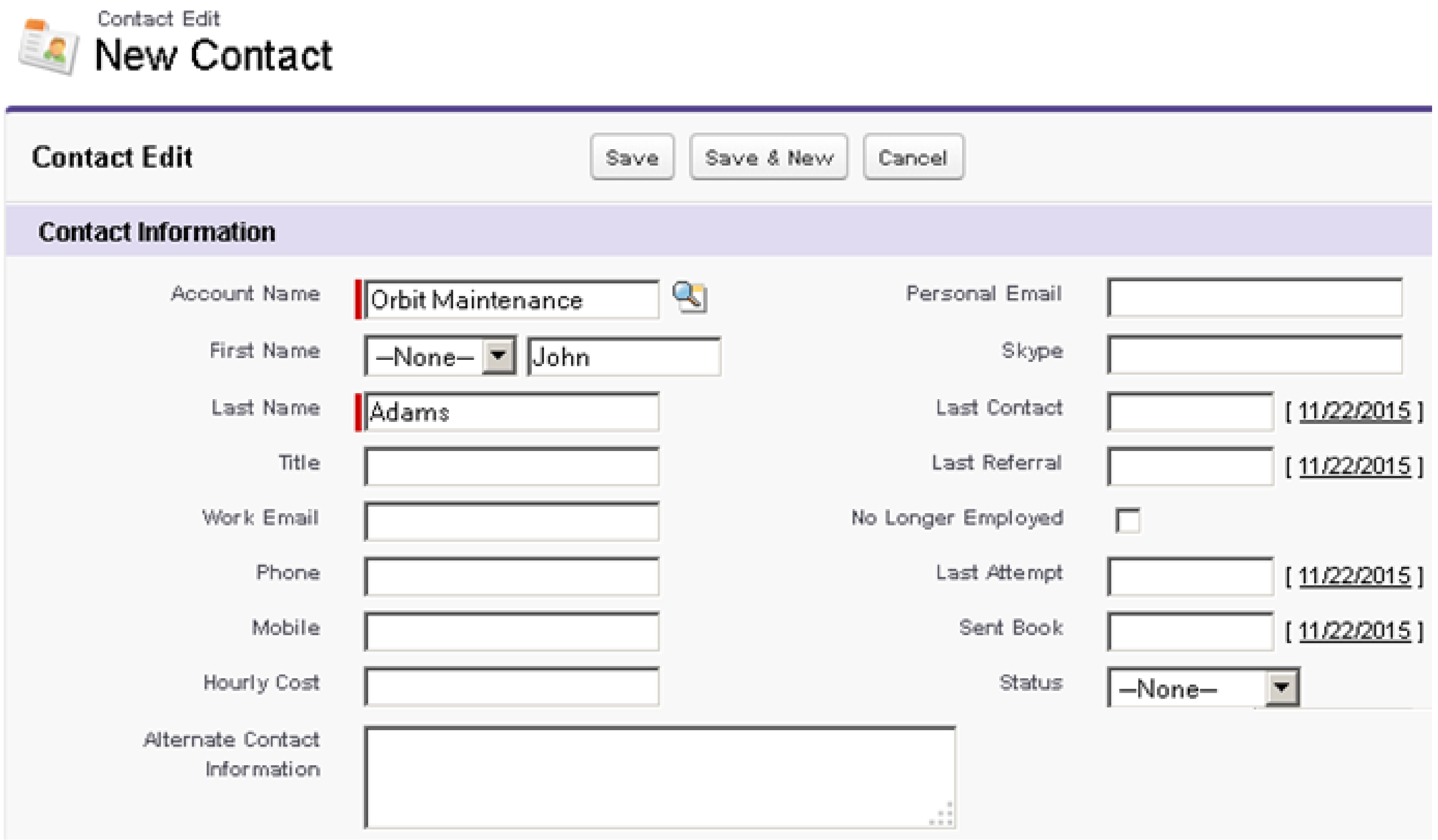
- Accounts hold business, organization, or household information
- Accounts will have multiple contacts or opportunities
- Account Name is the only required field



Creating Contacts

Following are the features of a contact:

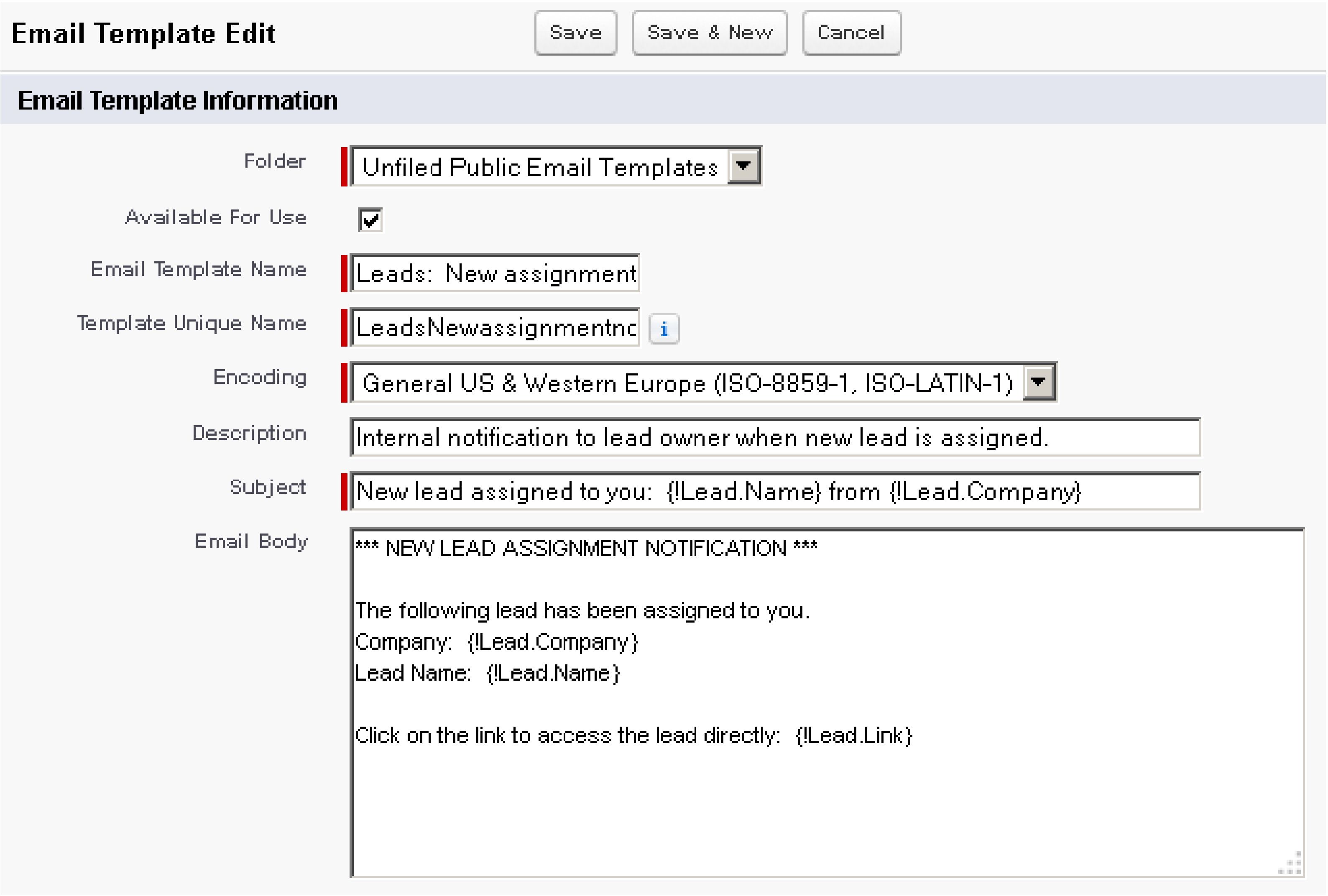
- Store information on individuals or deals
- Log interactions such as tasks and events
- Sync with Outlook or Gmail



Creating Email Templates

Following are the features of email templates:

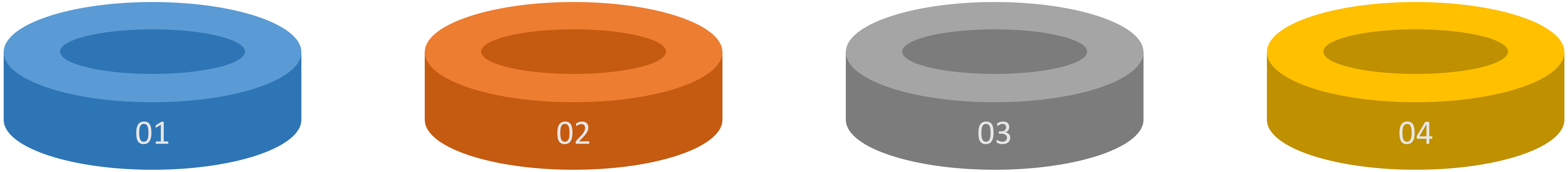
- It can be used for sending one-time and mass emails
- You can create Visualforce email template for advanced logic and merging
- You can use plain-text version for minimal formatting
- You can also use HTML version for graphical look and feel



Four Sales Productivity Features

Four Sales Productivity Features

Sales Productivity features are useful for all those organizations that plan to improve sales process efficiency. Salesforce provides the following four Sales Productivity features to achieve better results.



Salesforce Mobile

Salesforce-outlook connect

Salesforce Offline

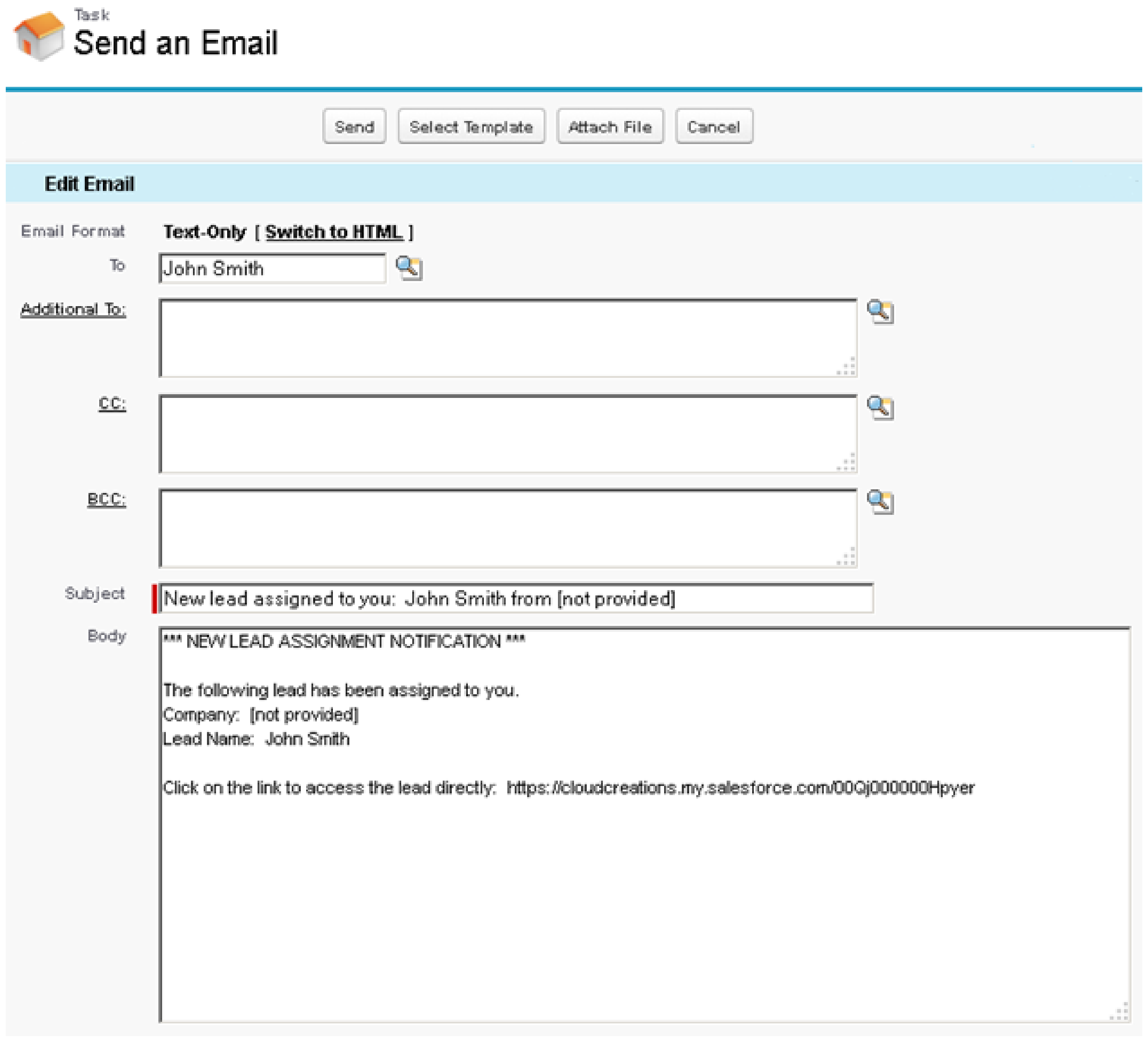
Salesforce

Sending Individual Emails

Sending Individual Emails

Following are the points to be remembered while sending individual emails:

- Select from pre-existing templates
- Add a cc, bcc, or additional to
- Attach files from your computer or Documents
- Send in text or HTML format
- View a history of sent emails on contacts and leads

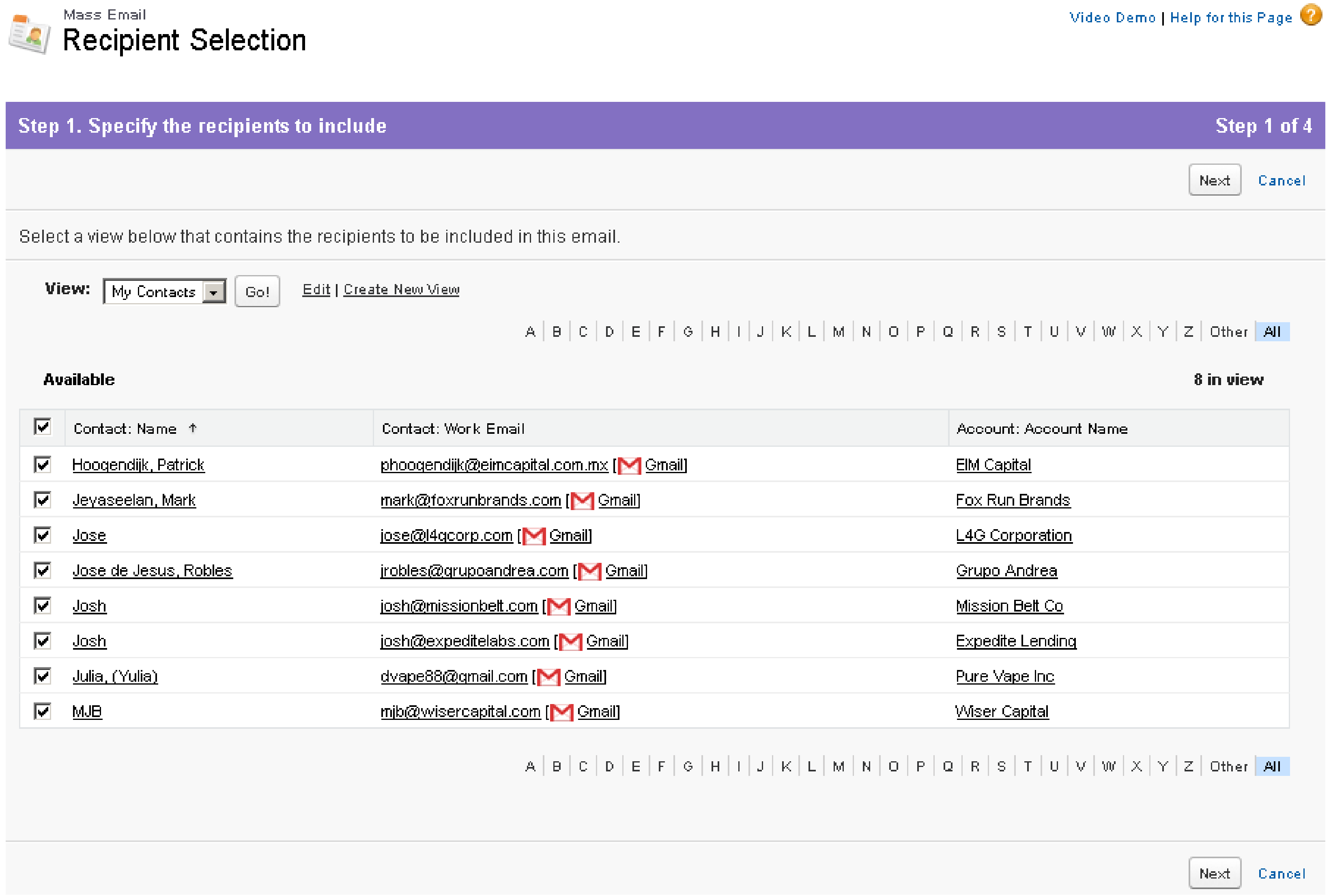


Sending Mass Emails

Sending Mass Emails

Following are the features of mass emailing:

- Select up to 250 recipients at a time
- Use pre-created email templates
- Track number of opens, and date of opens
- Create different lists for targeted emailing

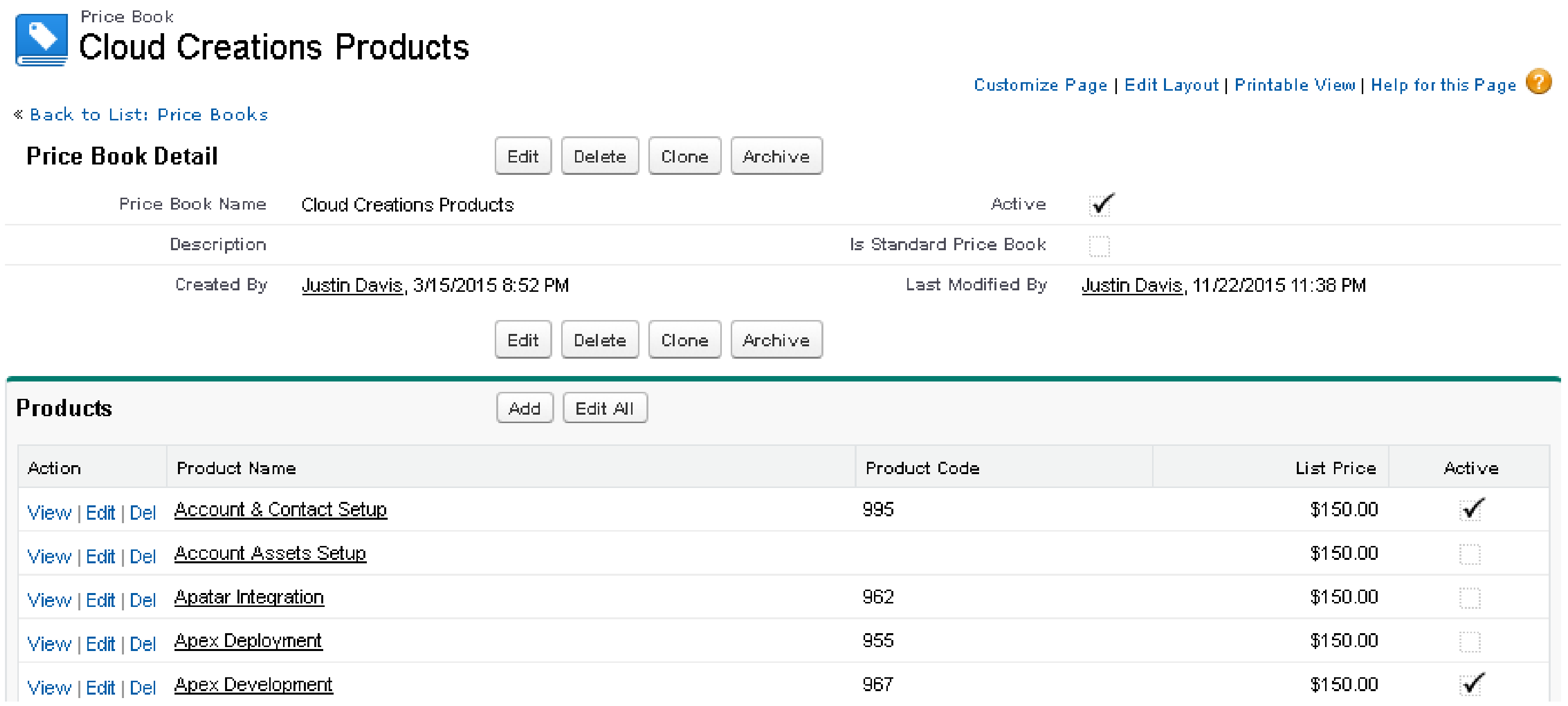


Creating and Managing Price Books

Creating and Managing Price Books

Keep the following points in mind while creating and managing price books:

- Manage pricing for different customers (wholesale vs. retail)
- Customize pricing on products per customer
- Standard vs. Custom Price Books

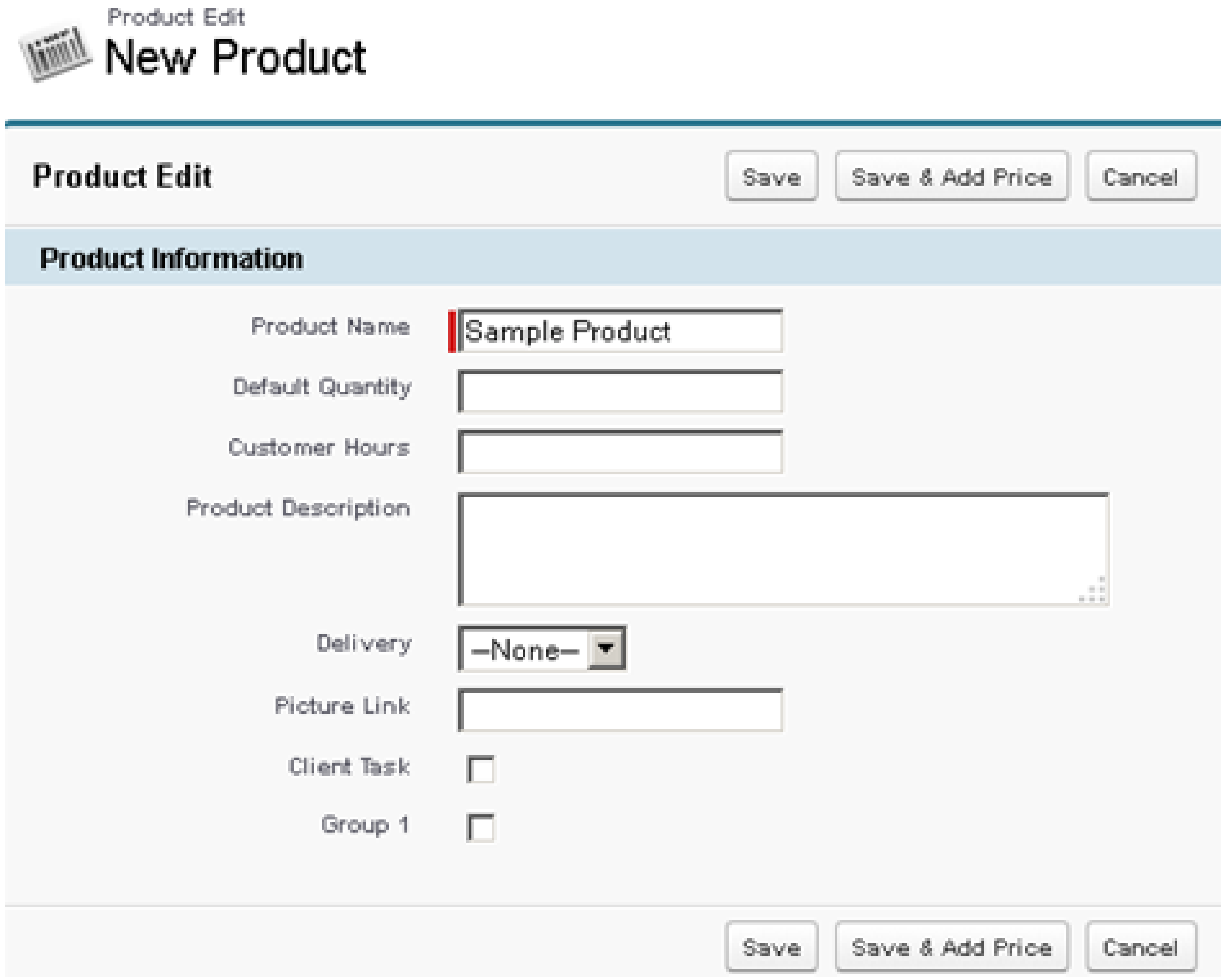


Creating Products

Creating Products

Keep the following points in mind while creating products:

- Creating a catalog of your products and services
- Add to opportunities and quotes for in-depth reporting
- Create custom fields for costing

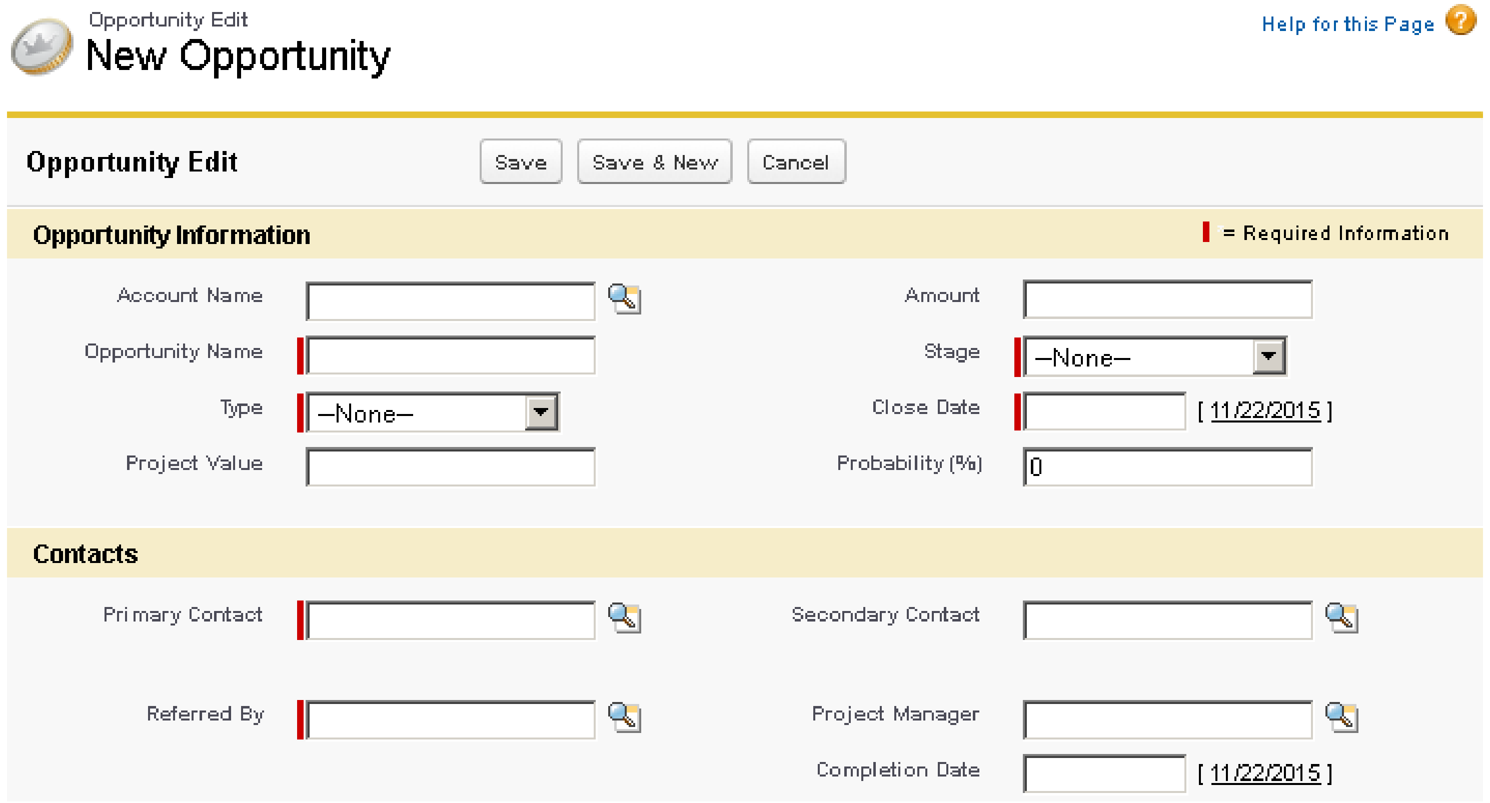


Creating Opportunities

Creating Opportunities

Opportunities in Salesforce allow you to:

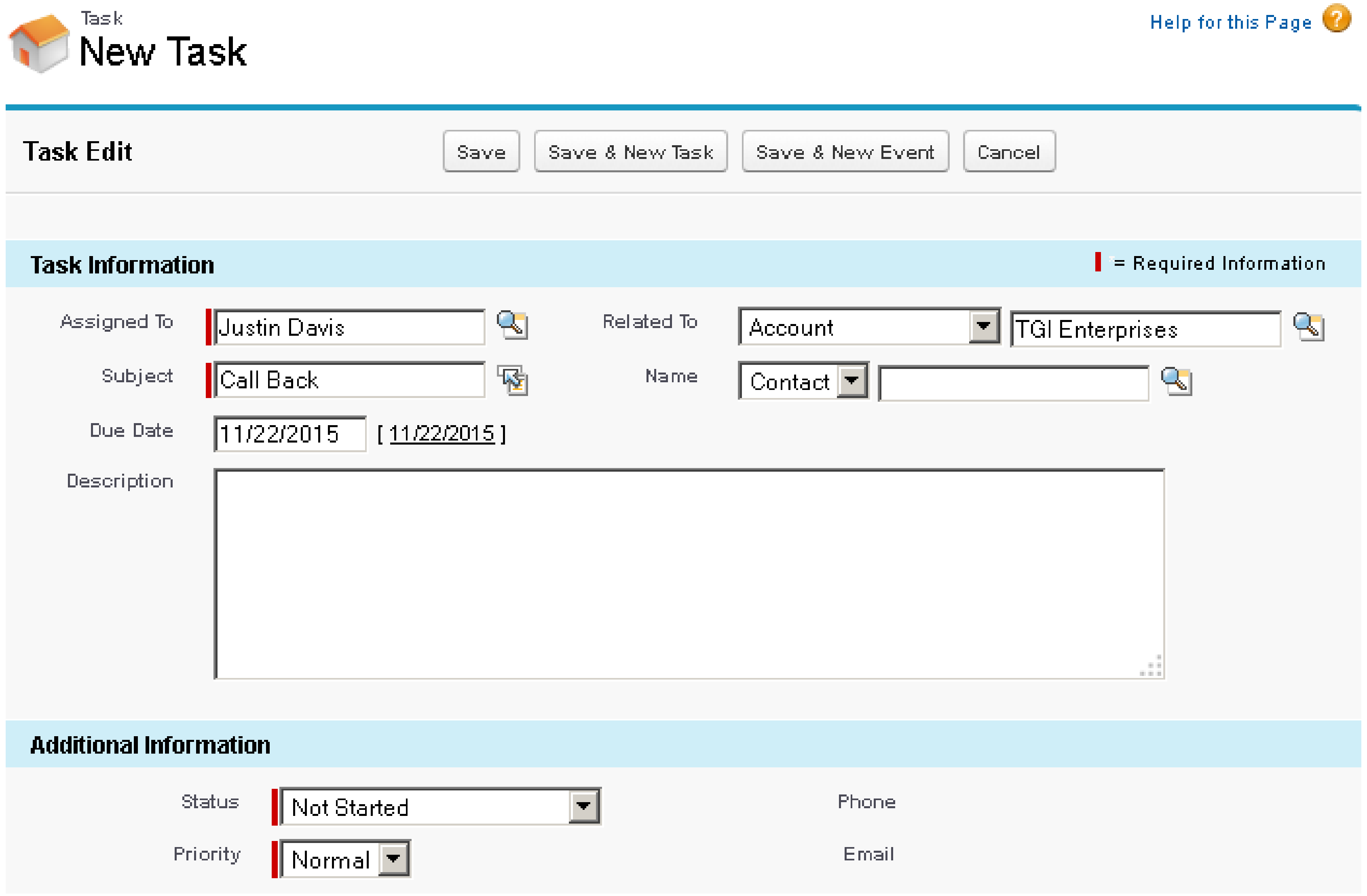
- Track sales and potential sales on a forecasted basis
- Create reports of products and discounts
- Report on win rates and sales effectiveness



Creating Activities

Keep the following points in mind while creating activities:

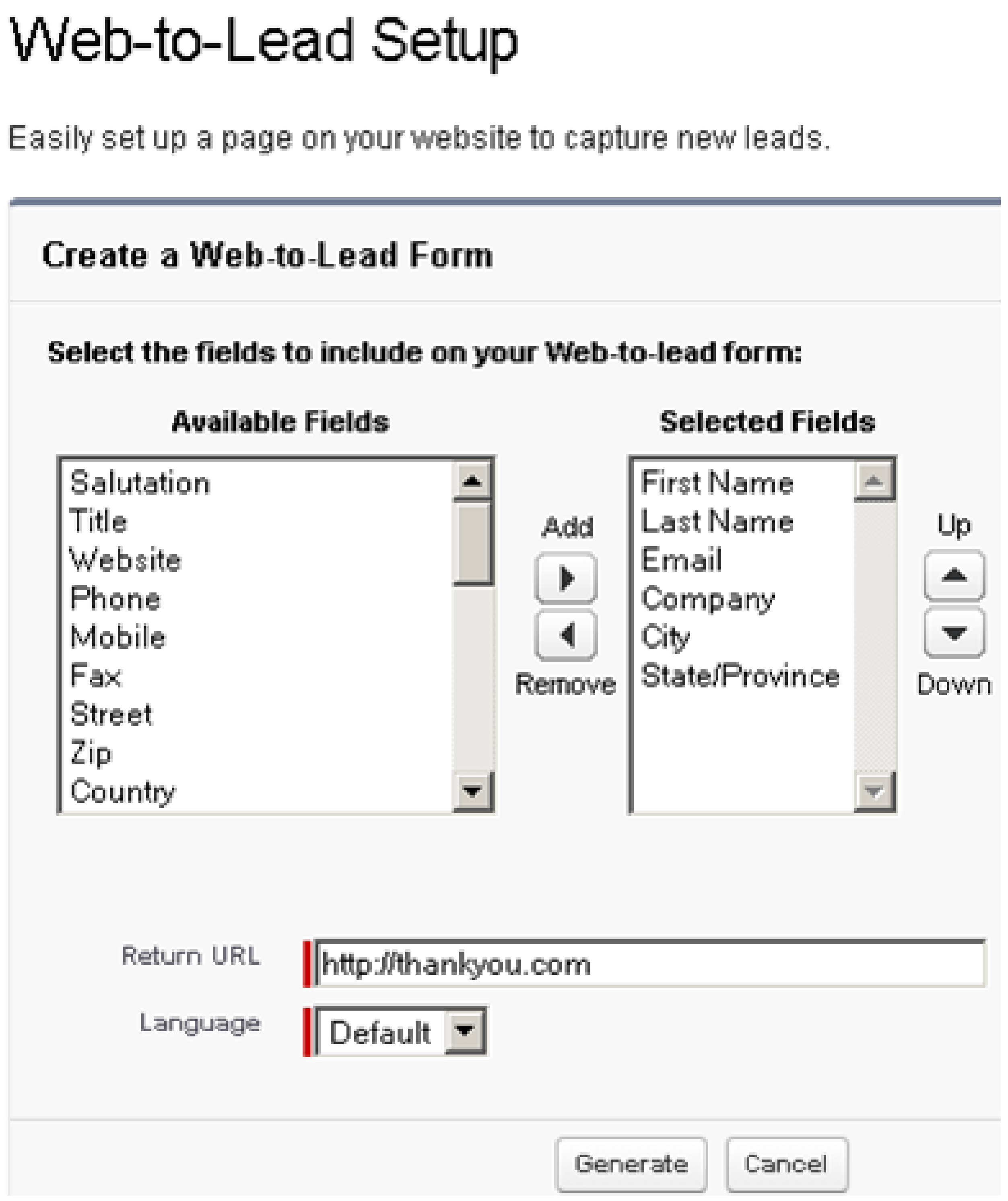
- Use date sensitive Tasks for your to-do list
- Use Events for time-sensitive actions such as meetings or calls
- Log on any object in Salesforce



Creating a Web-to-Lead Form

A Web-to-Lead form allows you to:

- Easily create an HTML form that can be posted anywhere online
- Use Lead Assignment rules to control salesperson ownership
- Create a hidden field to indicate the source of the lead

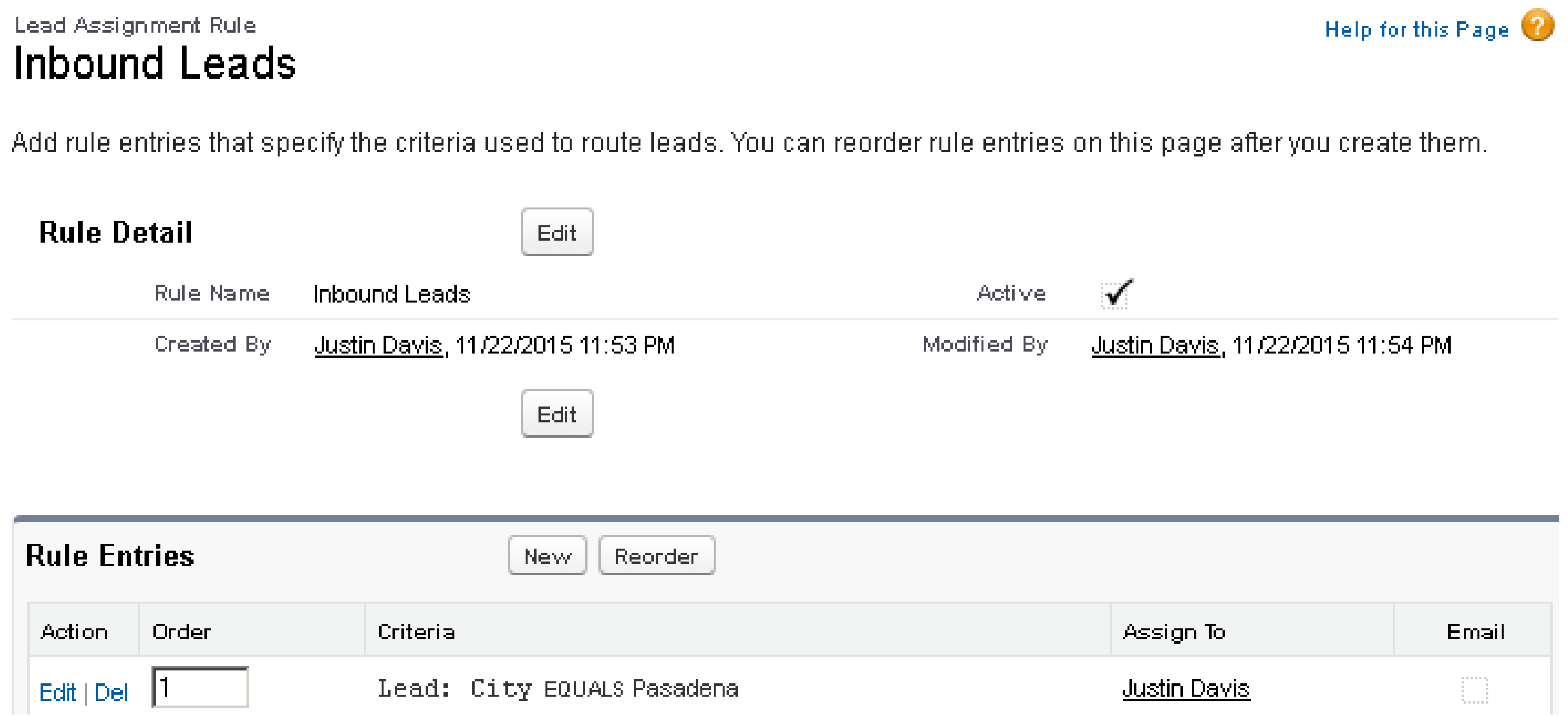


Creating a Lead Assignment Rule

Create a Lead Assignment Rule

Keep the following points in mind while creating a lead assignment rule:

- Create rules for routing new leads to the most appropriate sales person
- Select whether or not to notify via email
- Filter based on criteria such as geography

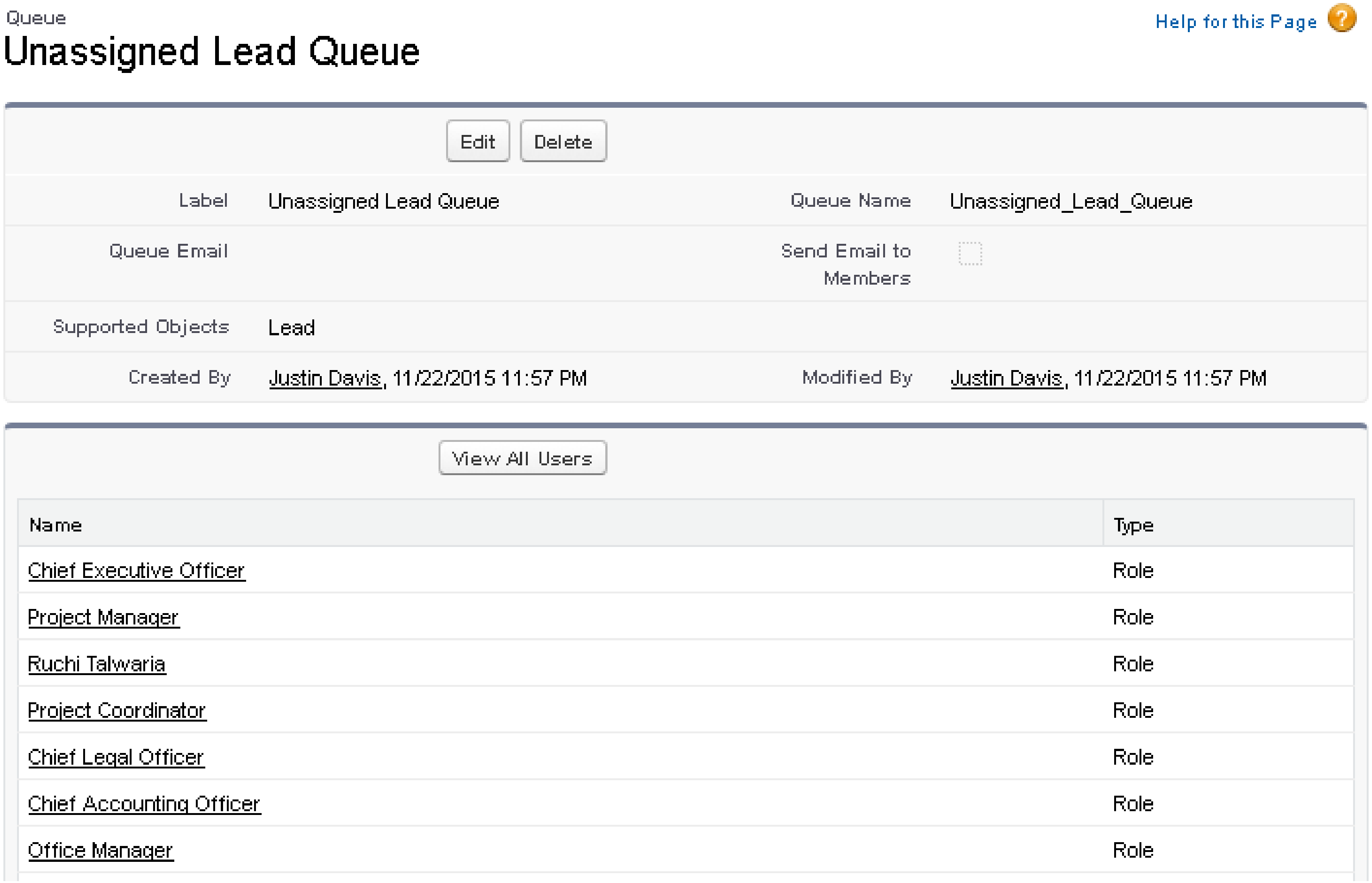


Creating a Lead Queue

Creating a Lead Queue

Keep the following points in mind while creating a lead queue:

- Holding area for leads that are not ready for assignment
- Queues don’t take up a user license
- Queues can be used for cold or disqualified leads

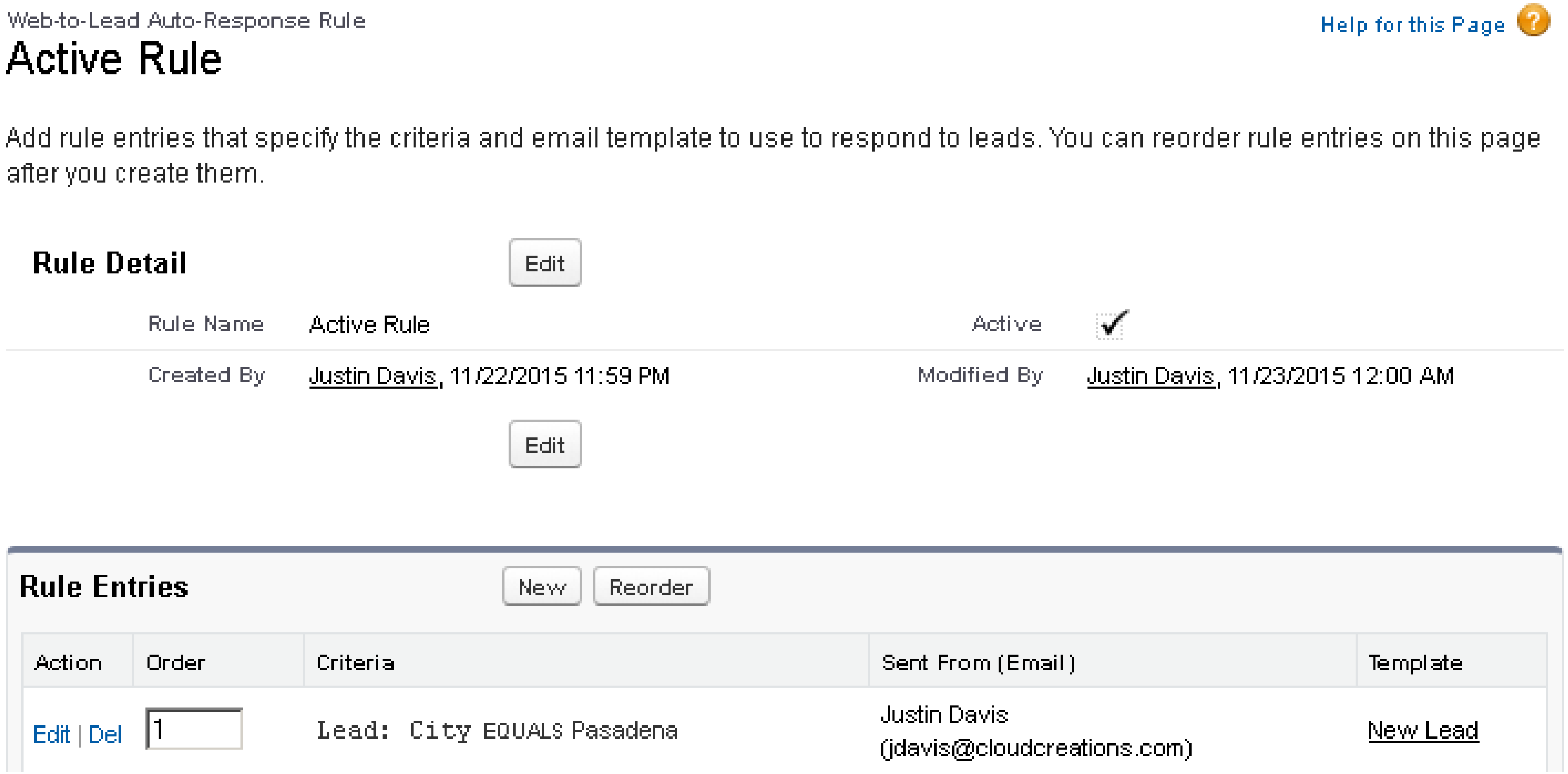


Creating an Auto-Response Rule

Creating an Auto-Response Rule

While creating an Auto-Response Rule, you can:

- Create customized responses based on Lead interest
- Use HTML or plain text email templates for responses
- Customize the “from” information

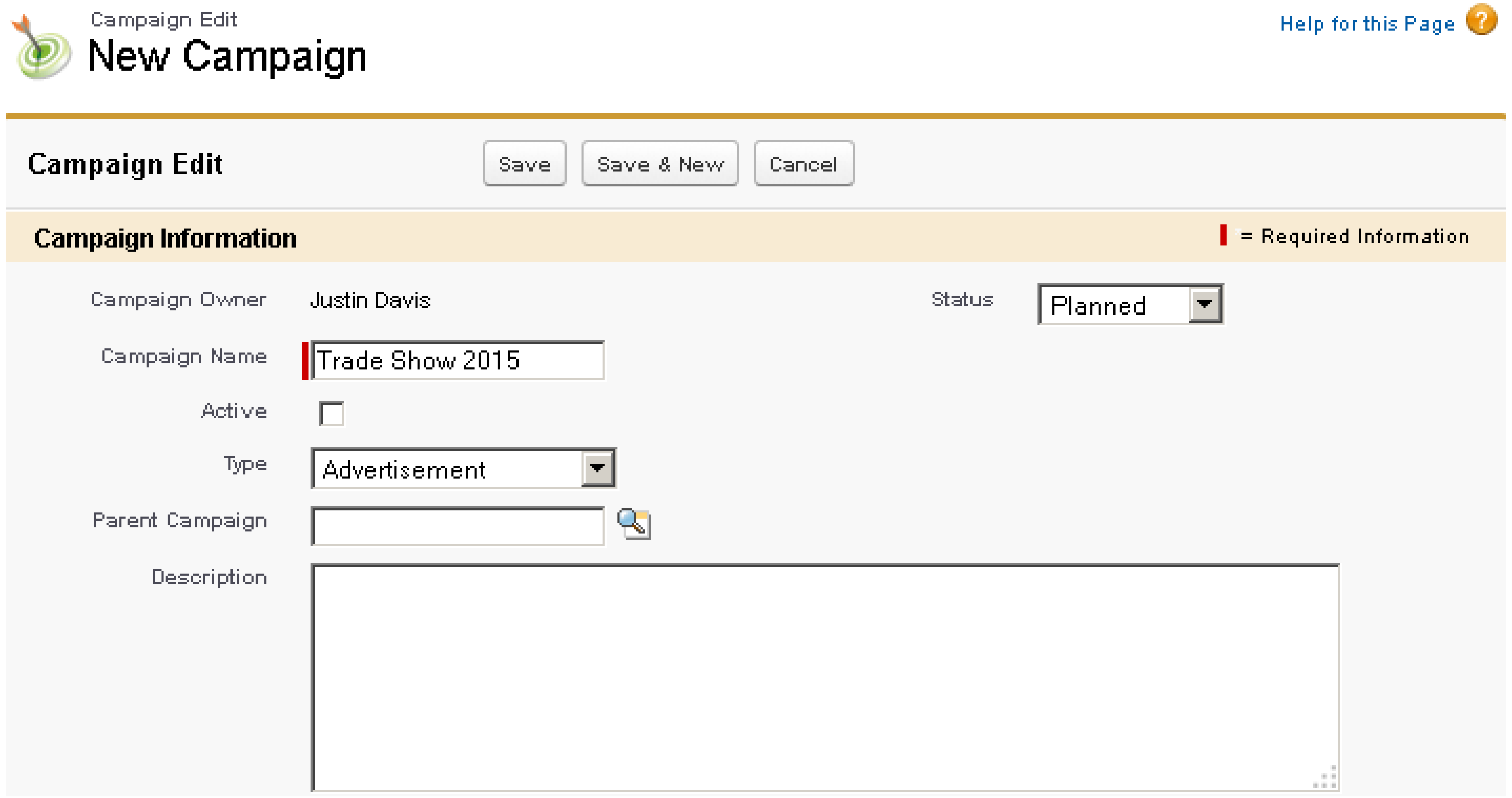


Creating Campaigns

Creating Campaigns

Keep the following points in mind while creating campaigns:

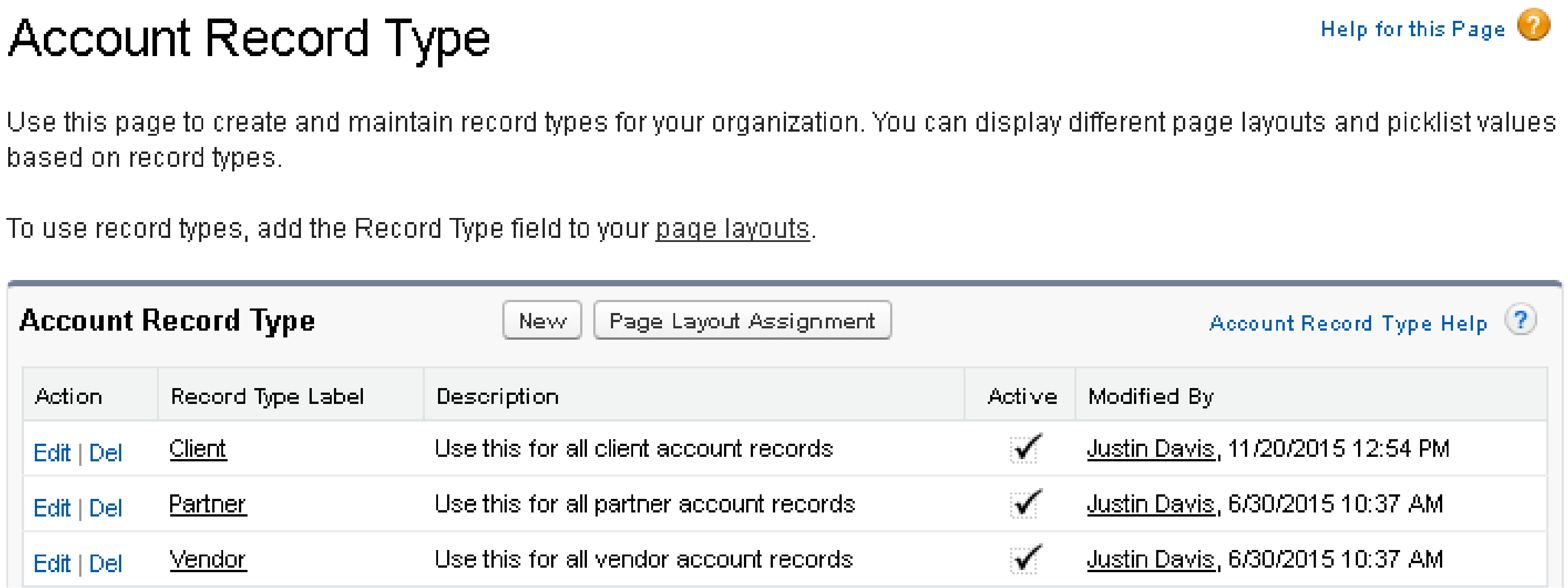
- Users must have the Marketing User check box checked
- Track marketing efforts based on types and categories
- Log campaigns on leads, contacts, and opportunities



Record Types

Following are the features of record type:

- Customize fields on page layouts based on record types
- Available on all standard and custom objects
- Control access at the profile level



Account Record Type

Help for this Page

Use this page to create and maintain record types for your organization. You can display different page layouts and picklist values based on record types.

To use record types, add the Record Type field to your page layouts.

Account Record Type New | Page Layout Assignment | Account Record Type Help

Action	Record Type Label	Description	Active	Modified By
Edit | Del	Client	Use this for all client account records	✓	Justin Davis, 11/20/2015 12:54 PM
Edit | Del	Partner	Use this for all partner account records	✓	Justin Davis, 6/30/2015 10:37 AM
Edit | Del	Vendor	Use this for all vendor account records	✓	Justin Davis, 6/30/2015 10:37 AM


?
Quiz

QUIZ

1

Which of the following records are **not** created when converting a lead?

a. Contact

b. Account

c. Opportunity

d. Case

QUIZ

1

Which of the following records are **not** created when converting a lead?

a. Contact

b. Account

c. Opportunity

d. Case

The correct answer is **d**.

Cases are not created on lead conversion.

QUIZ 2

Which is a required field on opportunity records?

a. Next Step

b. Description

c. Stage

d. Amount

QUIZ

2

Which is a required field on opportunity records?

a. Next Step

b. Description

c. Stage

d. Amount

The correct answer is c.

Stage is required when creating an opportunity.

QUIZ 3

What information can you report on when sending mass emails from Salesforce?

a. Recipient’s geography

b. Recipient’s time zone

c. If the recipient forwarded the email

d. If the recipient opened the email

QUIZ

3

What information can you report on when sending mass emails from Salesforce?

a. Recipient’s geography

b. Recipient’s time zone

c. If the recipient forwarded the email

d. If the recipient opened the email

The correct answer is d.

You can see if the recipient opened the email or not.

QUIZ 4	Where is pricing established for Products?

a. Account

b. Custom Settings

c. Pricebook

d. Opportunity

QUIZ

4

Where is pricing established for Products?

a. Account

b. Custom Settings

c. Pricebook

d. Opportunity

The correct answer is c.

Pricing for products is established on the Pricebook record in Salesforce.

QUIZ 5

What action do you need to take to allow a user to create campaign records?

a. Expose the campaigns tab

b. Create a list view

c. Purchase a marketing cloud license

d. Check the marketing user check box

QUIZ 5

What action do you need to take to allow a user to create campaign records?

a. Expose the campaigns tab

b. Create a list view

c. Purchase a marketing cloud license

d. Check the marketing user check box

The correct answer is **d**.

To allow a user to create campaigns, you must check the marketing user check box on their user record.

Case Study

Case Study 1

Scenario | Analysis | Solution

United Containers receives many leads from their website. These leads are a combination of hot, warm, and cold leads which are being manually assigned to salespeople. This is frustrating within the sales team as there are no objective standards by which these leads are being assigned. Too many people are receiving cold leads, while others are receiving elusive hot leads, sometimes in the wrong territories as well. United Containers needs a solution to automate lead assignment.

Scenario | Analysis | Solution

United Containers decided to implement lead assignment rules in Salesforce for the following reasons:

1. Leads can be assigned based on layers of criteria, including product interest and geography.
2. Leads can receive an auto-response email with a template based on their interest criteria.
3. Leads can be escalated automatically for larger purchase interests.

Scenario Analysis **Solution**

The following steps were taken by United Containers to solve their issues:

1. Three email templates were created to match the three different product inquiries.
2. Lead assignment rules were created to assign leads to users based on various criteria.
3. An unassigned lead queue was created for leads that did not fit any criteria as a holding area.

Case Study

simplilearn

Scenario | Analysis | Solution

United Containers is struggling to maintain an accurate sales pipeline. Sales seem to come in randomly, and the production and order fulfilment teams are struggling to ship orders on time. Currently the sales people are using spreadsheets to report their proposals, however, forecasting reports can't be created from these files. United containers needs a way to accurately predict and forecast sales to control production.

Scenario | **Analysis** | Solution

United Containers decided to use reports in Salesforce to forecast sales:

1. Salesforce reports allow for flexibility with formulas.
2. Salespeople can manually edit the close date field for better accuracy.
3. Reports can be emailed automatically to any Salesforce user on a regular basis.

Scenario | Analysis | **Solution**

Following steps were taken by United Containers to solve their issues:

1. All salespeople were asked to update the Close Date field on Opportunities.
2. A matrix report was created displaying forecasted sales by month by salesperson.
3. Operations was given Salesforce access, along with a link to the forecasting report.

Key Takeaways

- Leads, Contacts, Accounts, and Opportunities are the foundation of the Sales Cloud.
- Products and Price Books are used to reference pricing information.
- Lead Assignment Rules can assign record ownership based on certain criteria.
- Record Types are used to segment different types of data.

This concludes ‘Salesforce Cloud.’

The next Lesson is ‘Quote Templates.’