

# Salesforce Certified Admin and App Builder

## Lesson 18—Sales Cloud

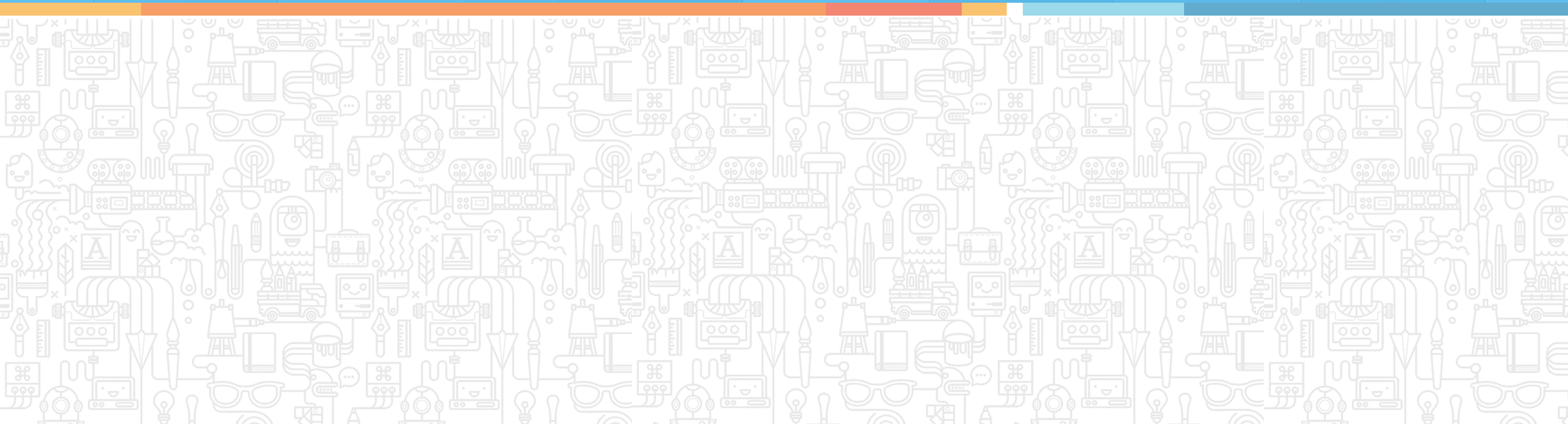


## What You'll Learn

- 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



The leads home page is used to:

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

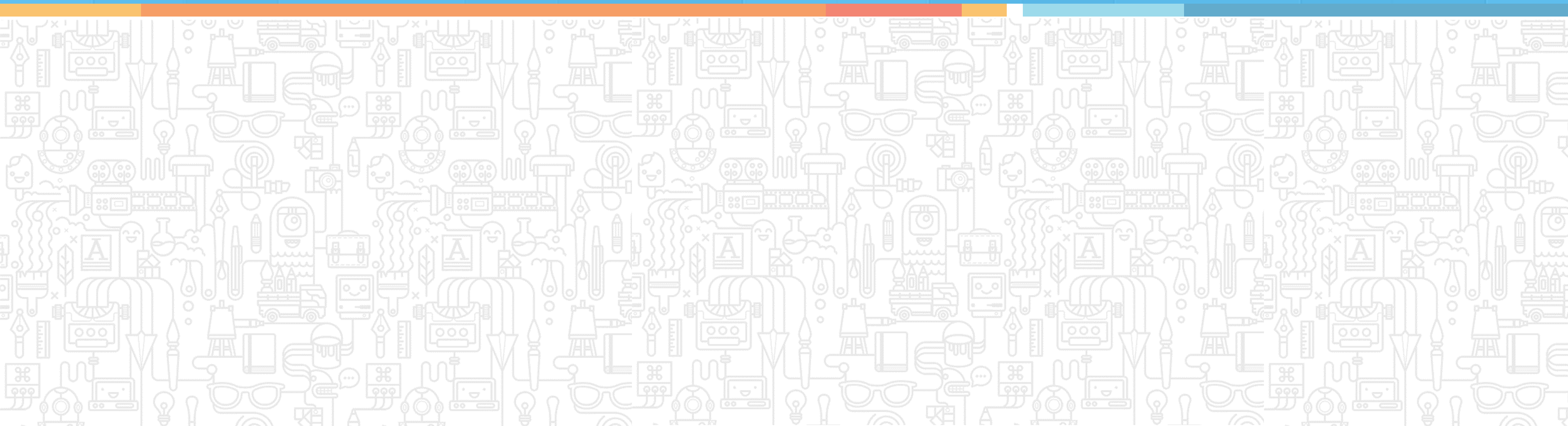


View:   [Edit](#) | [Create New View](#)

## Recent Leads

Name	Company
<a href="#">Smith, John</a>	<a href="#">[not provided]</a>
<a href="#">EagexiaEthem, EagexiaEthem</a>	<a href="#">[not provided]</a>
<a href="#">Doyle, Sean</a>	<a href="#">[not provided]</a>
<a href="#">ali, Haider</a>	<a href="#">[not provided]</a>
<a href="#">EagexiaEthem, EagexiaEthem</a>	<a href="#">[not provided]</a>
<a href="#">Peterson, Garrett</a>	<a href="#">[not provided]</a>
<a href="#">Rowe, Maxwell</a>	<a href="#">[not provided]</a>

# 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

## Step 2. Specify Filter Criteria


### Filter By Owner:

- ☒ All Unconverted Leads
- ☐ My Unconverted Leads
- ☐ Queue —None—

### Filter By Campaign (Optional):

Campaign Name:  

### Filter By Additional Fields (Optional):

Field	Operator	Value	
<span>Lead Status</span>	<span>not equal to</span>	<span>Qualified</span>	
<span>—None—</span>	<span>—None—</span>	<input type="text"/>	
<span>—None—</span>	<span>—None—</span>	<input type="text"/>	
<span>—None—</span>	<span>—None—</span>	<input type="text"/>	
<span>—None—</span>	<span>—None—</span>	<input type="text"/>	

[Add Filter Logic...](#)



# 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



**Lead Edit**

SaveSave & NewCancel

**Lead Information**

Lead OwnerJustin Davis

First Name

-None-

Last Name

Company

Title

What is your timeframe?

Lead Status

Open

Phone

Email

Rating

-None-

**Address Information**

Street

City

State/Province

Zip/Postal Code

Country

Website

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8



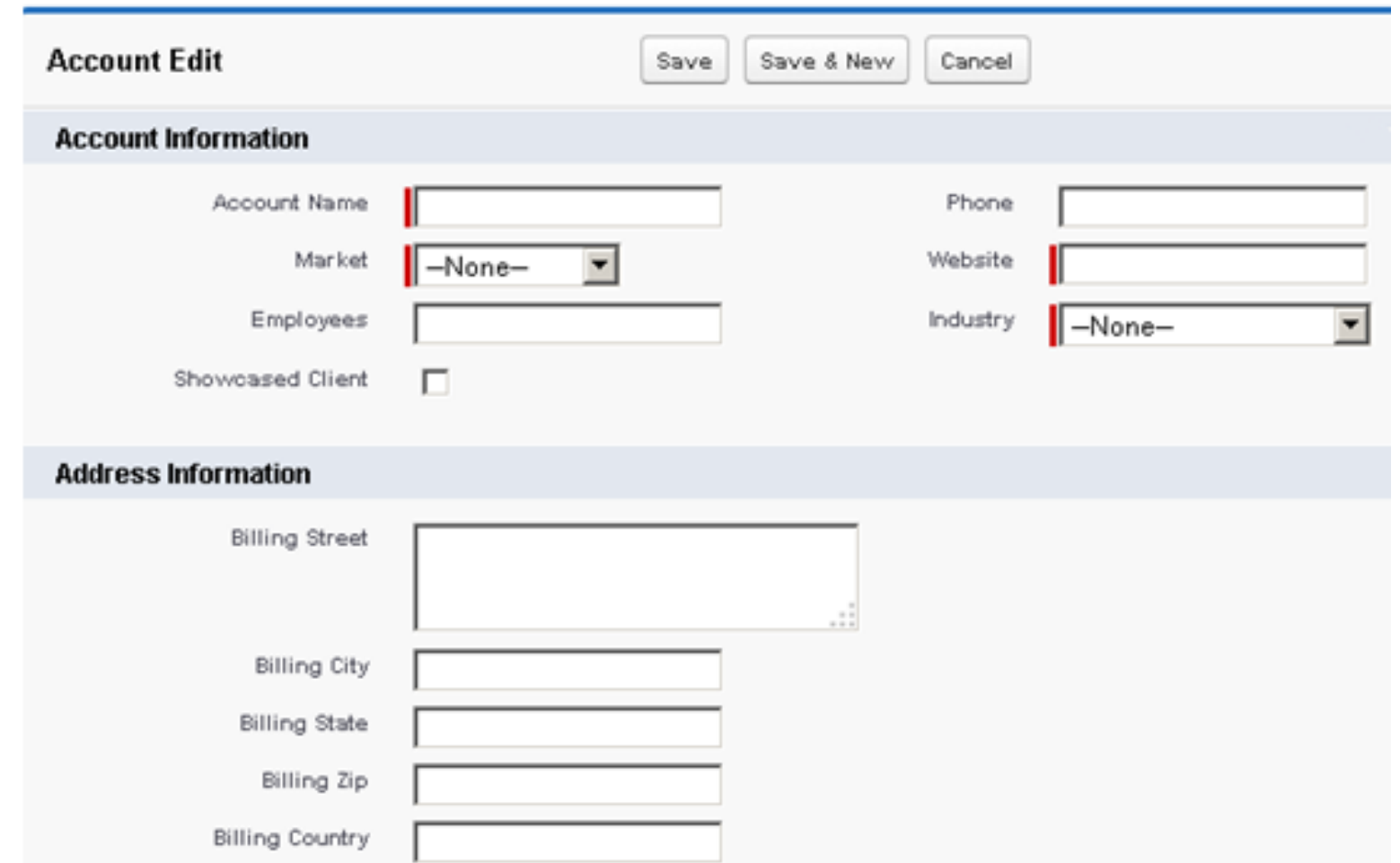
# Creating Accounts



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

Account Edit  
New Account



**Account Edit** [Save] [Save & New] [Cancel]

**Account Information**

Account Name [Text Input] Phone [Text Input]

Market [-None-] Website [Text Input]

Employees [Text Input] Industry [-None-]

Showcased Client ☐

**Address Information**

Billing Street [Text Input]

Billing City [Text Input]

Billing State [Text Input]

Billing Zip [Text Input]


Billing Country [Text Input]

# 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

 **Contact Edit**  
**New Contact**

**Contact Edit** Save Save & New Cancel

**Contact Information**

Account Name	<input type="text" value="Orbit Maintenance"/>		Personal Email	<input type="text"/>
First Name	<input type="text" value="-None-"/> <input type="text" value="John"/>		Skype	<input type="text"/>
Last Name	<input type="text" value="Adams"/>		Last Contact	<input type="text" value="11/22/2015"/>
Title	<input type="text"/>		Last Referral	<input type="text" value="11/22/2015"/>
Work Email	<input type="text"/>		No Longer Employed	<input type="checkbox"/>
Phone	<input type="text"/>		Last Attempt	<input type="text" value="11/22/2015"/>
Mobile	<input type="text"/>		Sent Book	<input type="text" value="11/22/2015"/>
Hourly Cost	<input type="text"/>		Status	<input type="text" value="-None-"/>
Alternate Contact Information	<input type="text"/>			



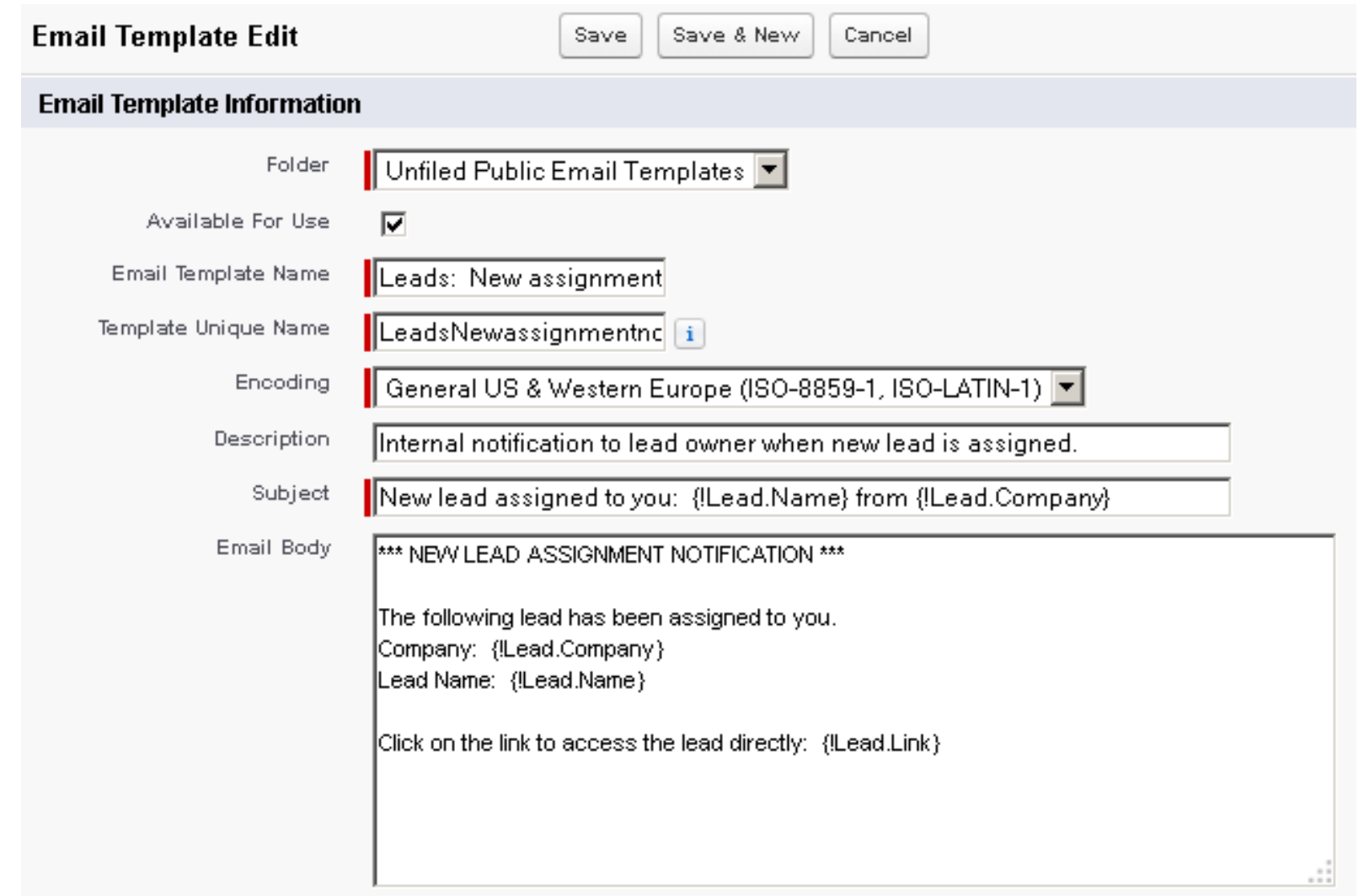
# Creating Email Templates





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



The screenshot shows the 'Email Template Edit' window. At the top right are buttons for 'Save', 'Save & New', and 'Cancel'. Below is a section titled 'Email Template Information' with the following fields:

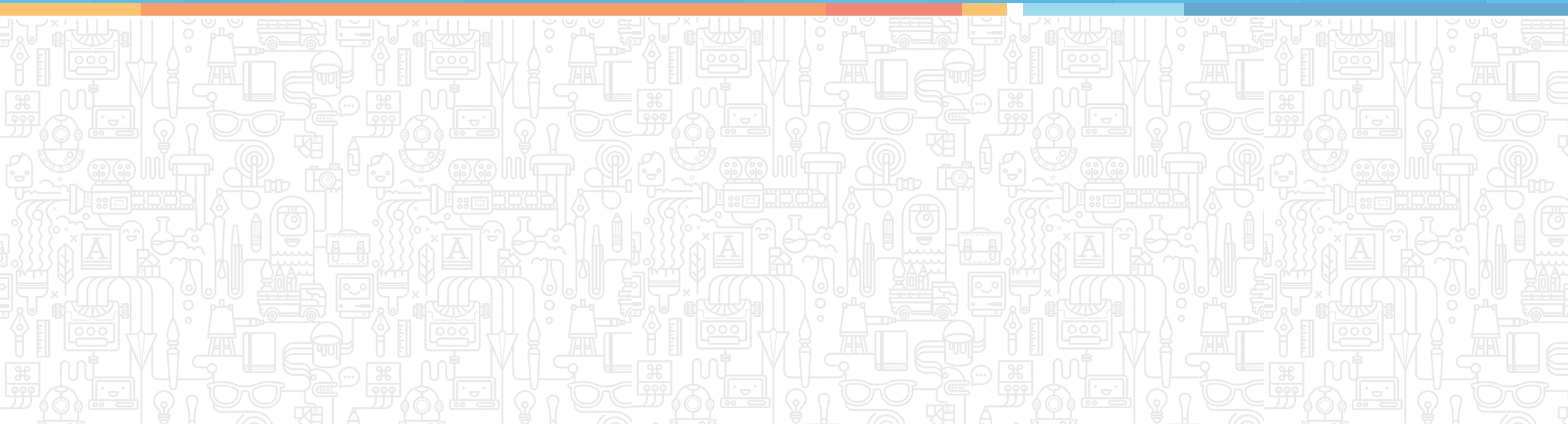
- Folder:** A dropdown menu showing 'Unfiled Public Email Templates'.
- Available For Use:** A checkbox that is checked.
- Email Template Name:** A text field containing 'Leads: New assignment'.
- Template Unique Name:** A text field containing 'LeadsNewassignmentnc' with an information icon to its right.
- Encoding:** A dropdown menu showing 'General US & Western Europe (ISO-8859-1, ISO-LATIN-1)'.
- Description:** A text field containing 'Internal notification to lead owner when new lead is assigned.'
- Subject:** A text field containing 'New lead assigned to you: {!Lead.Name} from {!Lead.Company}'.
- Email Body:** A large text area containing the following text:

```
*** NEW LEAD ASSIGNMENT NOTIFICATION ***

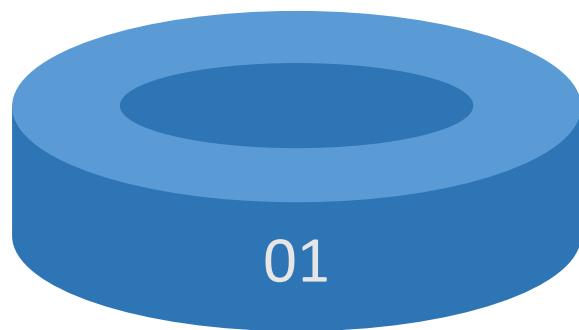
The following lead has been assigned to you.
Company: {!Lead.Company}
Lead Name: {!Lead.Name}

Click on the link to access the lead directly: {!Lead.Link}
```

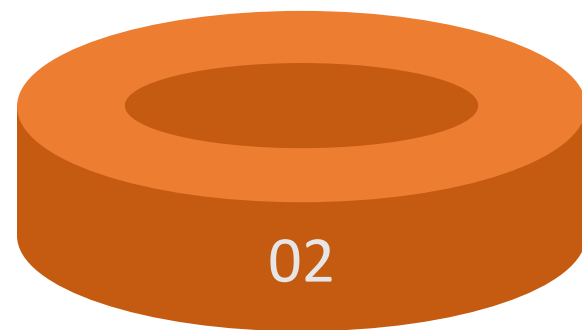
# Four Sales Productivity Features



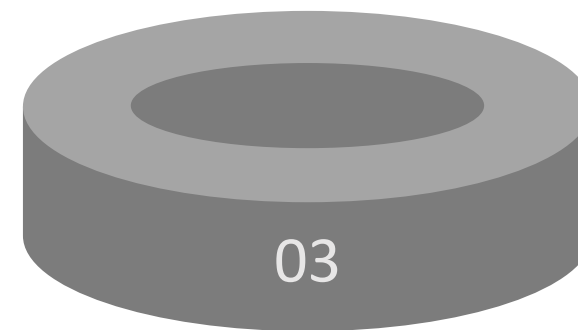
Sales Productivity features are useful for all those organizations that plan to improve sales process efficiency. Salesforce provides the following four Sales Productivity features to achieve better results.



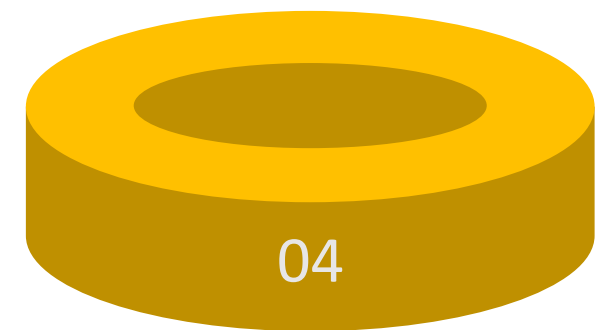
**Salesforce Mobile**



**Salesforce-outlook connect**

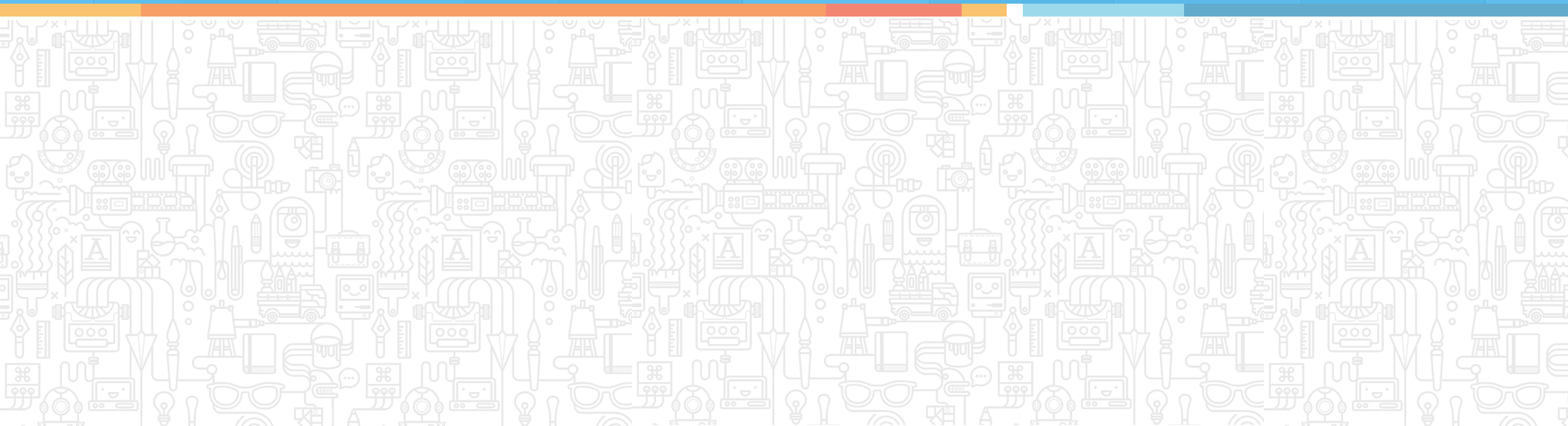


**Salesforce Offline**



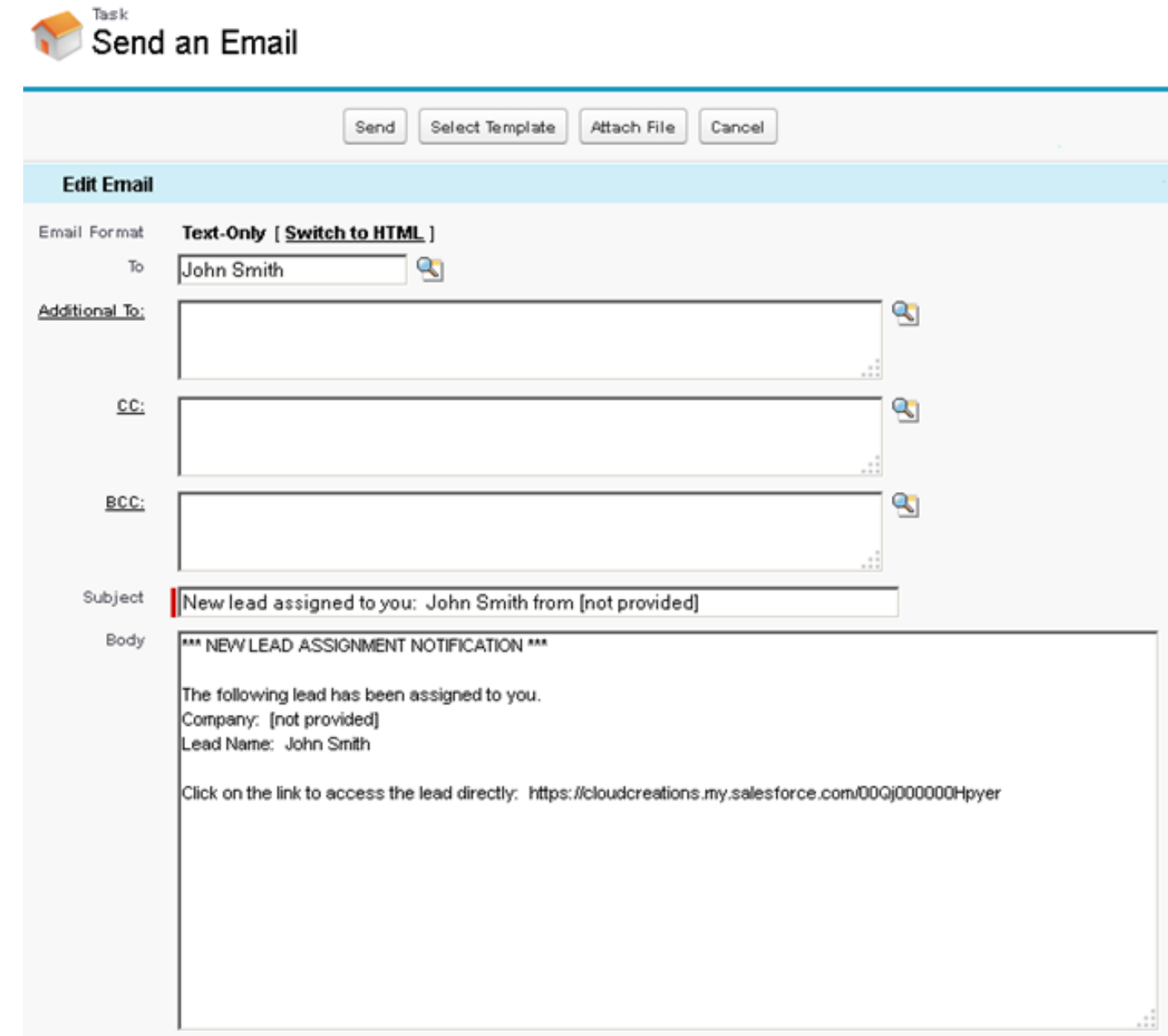
**Salesforce**

# Sending Individual Emails



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



The screenshot shows a 'Task Send an Email' window. At the top, there are buttons for 'Send', 'Select Template', 'Attach File', and 'Cancel'. Below these is a section titled 'Edit Email'. The 'Email Format' is set to 'Text-Only' with a link to 'Switch to HTML'. The 'To' field contains 'John Smith'. There are empty fields for 'Additional To:', 'CC:', and 'BCC:'. The 'Subject' field contains 'New lead assigned to you: John Smith from [not provided]'. The 'Body' field contains a pre-written email template for a lead assignment notification, including a link to access the lead directly.

Task Send an Email

Send Select Template Attach File Cancel

**Edit Email**

Email Format **Text-Only** [ [Switch to HTML](#) ]

To John Smith

Additional To:

CC:

BCC:

Subject New lead assigned to you: John Smith from [not provided]

Body

\*\*\* NEW LEAD ASSIGNMENT NOTIFICATION \*\*\*

The following lead has been assigned to you.  
Company: [not provided]  
Lead Name: John Smith

Click on the link to access the lead directly: <https://cloudcreations.my.salesforce.com/00Qj000000Hpyer>



# 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

## Mass Email Recipient Selection

[Video Demo](#) | [Help for this Page](#) ?

**Step 1. Specify the recipients to include** Step 1 of 4









[Next](#) [Cancel](#)

Select a view below that contains the recipients to be included in this email.

**View:** My Contacts [Go!](#) [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other [All](#)

**Available** 8 in view

<input checked="" type="checkbox"/>	Contact: Name ↑	Contact: Work Email	Account: Account Name
<input checked="" type="checkbox"/>	<a href="#">Hooqendijk, Patrick</a>	<a href="mailto:phooqendijk@eimcapital.com.mx">phooqendijk@eimcapital.com.mx</a> 	<a href="#">EIM Capital</a>
<input checked="" type="checkbox"/>	<a href="#">Jeyaseelan, Mark</a>	<a href="mailto:mark@foxrunbrands.com">mark@foxrunbrands.com</a> 	<a href="#">Fox Run Brands</a>
<input checked="" type="checkbox"/>	<a href="#">Jose</a>	<a href="mailto:jose@l4qcorp.com">jose@l4qcorp.com</a> 	<a href="#">L4G Corporation</a>
<input checked="" type="checkbox"/>	<a href="#">Jose de Jesus, Robles</a>	<a href="mailto:jrobles@grupoandrea.com">jrobles@grupoandrea.com</a> 	<a href="#">Grupo Andrea</a>
<input checked="" type="checkbox"/>	<a href="#">Josh</a>	<a href="mailto:josh@missionbelt.com">josh@missionbelt.com</a> 	<a href="#">Mission Belt Co</a>
<input checked="" type="checkbox"/>	<a href="#">Josh</a>	<a href="mailto:josh@expeditelabs.com">josh@expeditelabs.com</a> 	<a href="#">Expedite Lending</a>
<input checked="" type="checkbox"/>	<a href="#">Julia, (Yulia)</a>	<a href="mailto:dvape88@gmail.com">dvape88@gmail.com</a> 	<a href="#">Pure Vape Inc</a>
<input checked="" type="checkbox"/>	<a href="#">MJB</a>	<a href="mailto:mjb@wisercapital.com">mjb@wisercapital.com</a> 	<a href="#">Wiser Capital</a>

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other [All](#)

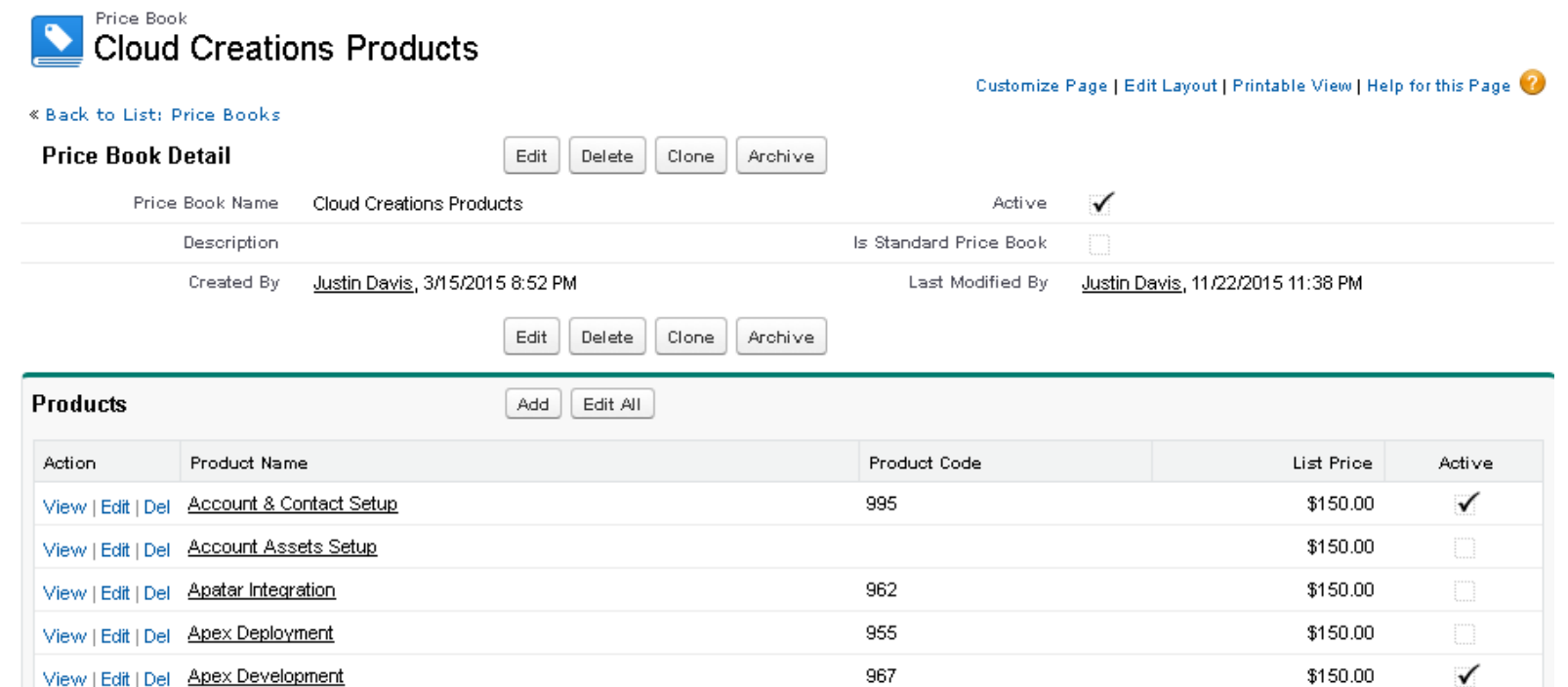
[Next](#) [Cancel](#)

# 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



The screenshot shows the 'Price Book' detail page for 'Cloud Creations Products'. At the top, there's a header with the title and navigation links like 'Customize Page', 'Edit Layout', 'Printable View', and 'Help for this Page'. Below the title, there are buttons for 'Edit', 'Delete', 'Clone', and 'Archive'. The main section displays the 'Price Book Detail' with fields for 'Price Book Name' (Cloud Creations Products), 'Description', 'Created By' (Justin Davis, 3/15/2015 8:52 PM), 'Last Modified By' (Justin Davis, 11/22/2015 11:38 PM), 'Is Standard Price Book' (checkbox), and 'Active' (checkbox, checked). Below this, there's a 'Products' section with a table listing products and their prices.

Action	Product Name	Product Code	List Price	Active
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Account &amp; Contact Setup</a>	995	\$150.00	<input checked="" type="checkbox"/>
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Account Assets Setup</a>		\$150.00	<input type="checkbox"/>
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Aptar Integration</a>	962	\$150.00	<input type="checkbox"/>
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Apex Deployment</a>	955	\$150.00	<input type="checkbox"/>
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Apex Development</a>	967	\$150.00	<input checked="" type="checkbox"/>




# 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

 Product Edit  
**New Product**

---

**Product Edit** Save Save & Add Price Cancel

**Product Information**

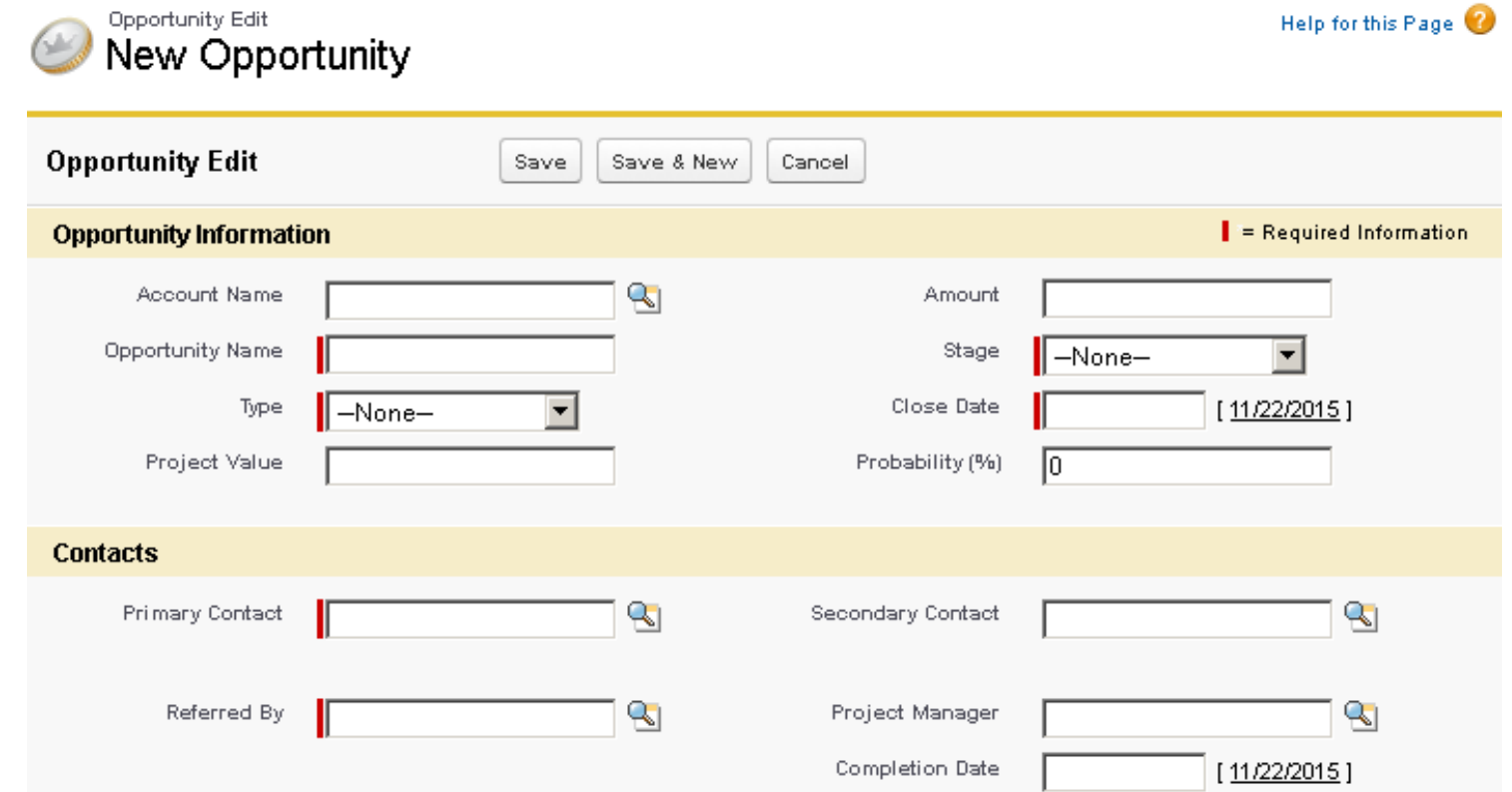
Product Name	<input type="text" value="Sample Product"/>
Default Quantity	<input type="text"/>
Customer Hours	<input type="text"/>
Product Description	<input type="text"/>
Delivery	<input type="text" value="-None-"/>
Picture Link	<input type="text"/>
Client Task	<input type="checkbox"/>
Group 1	<input type="checkbox"/>

Save Save & Add Price Cancel



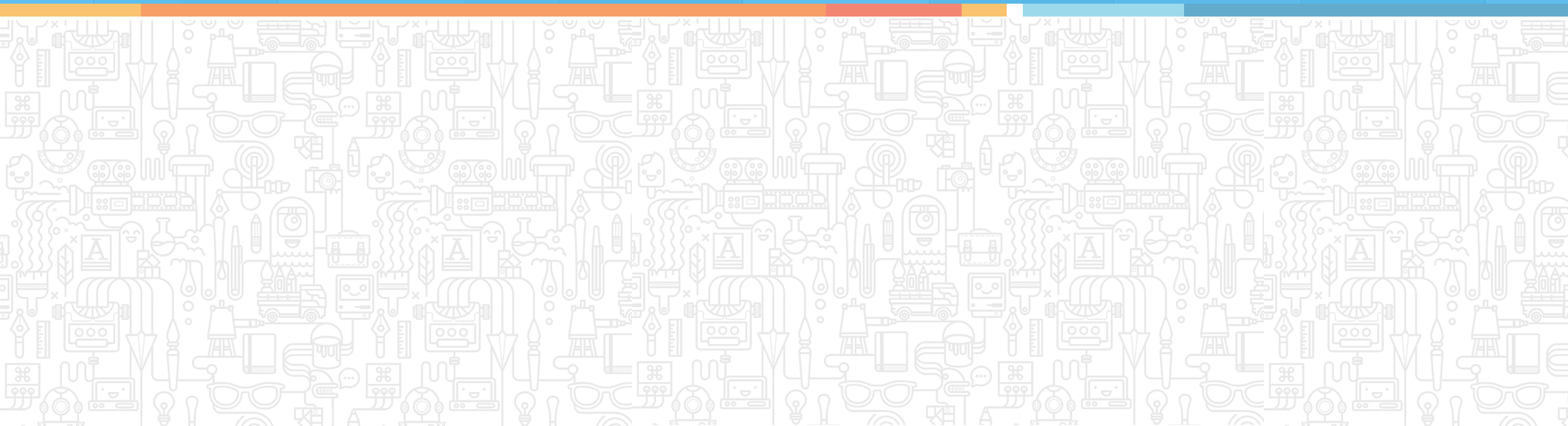
Opportunities in Salesforce allow you to:

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



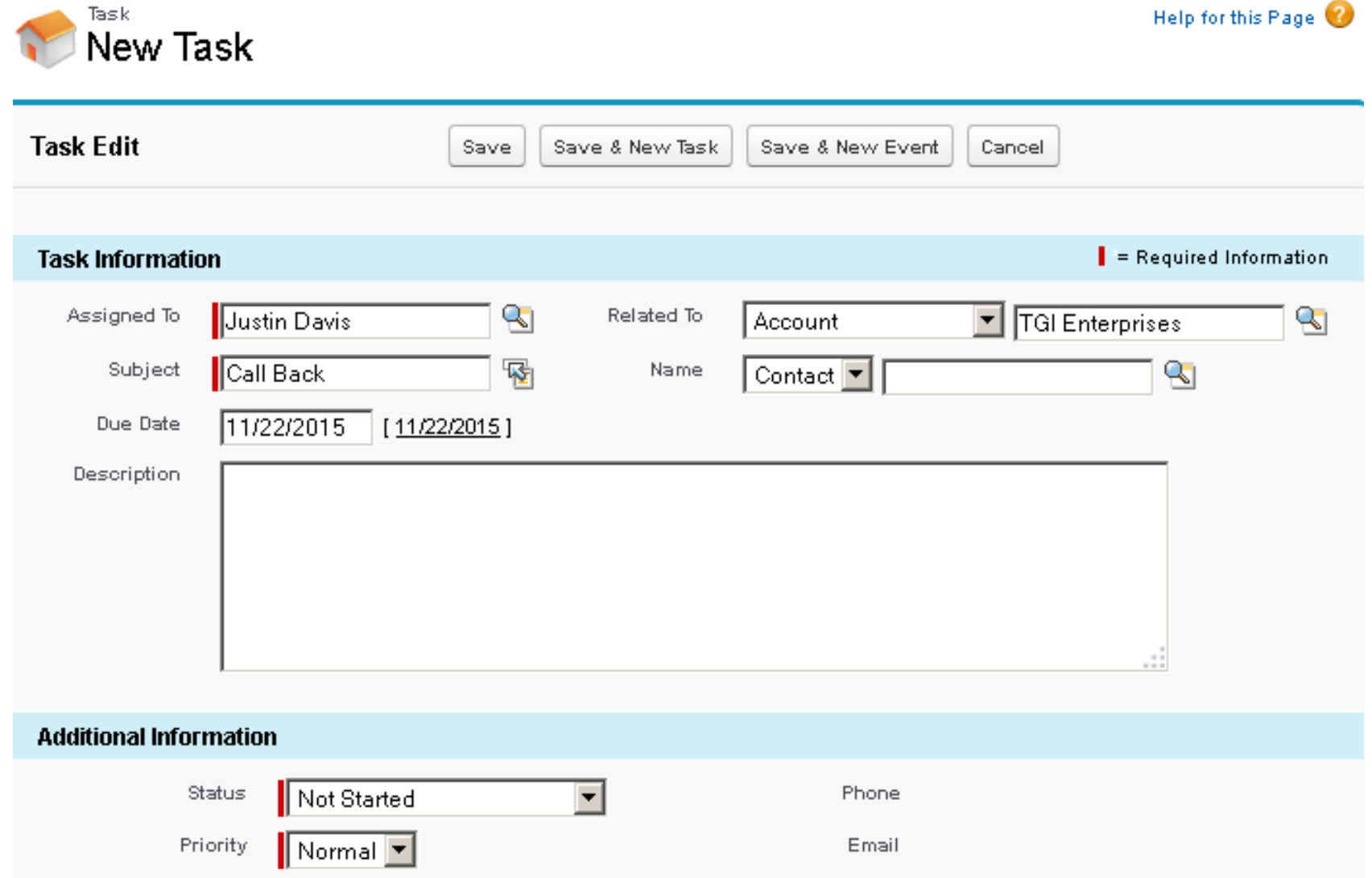
The screenshot displays the 'New Opportunity' form in Salesforce. At the top, there's a header bar with 'Opportunity Edit' and 'New Opportunity' text, along with 'Save', 'Save & New', and 'Cancel' buttons. A 'Help for this Page' link is also present. The form is divided into two main sections: 'Opportunity Information' and 'Contacts'. The 'Opportunity Information' section includes fields for 'Account Name', 'Opportunity Name', 'Type' (a dropdown menu currently showing '-None-'), 'Project Value', 'Amount', 'Stage' (a dropdown menu currently showing '-None-'), 'Close Date' (with a date picker set to 11/22/2015), and 'Probability (%)' (set to 0). A red vertical bar next to the 'Opportunity Name' and 'Type' fields indicates they are required. The 'Contacts' section includes fields for 'Primary Contact', 'Secondary Contact', 'Referred By', 'Project Manager', and 'Completion Date' (with a date picker set to 11/22/2015). Red vertical bars next to the 'Primary Contact' and 'Referred By' fields indicate they are required. A legend at the top right of the 'Opportunity Information' section states 'I = Required Information'.

# 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



The screenshot shows the 'New Task' form in Salesforce. At the top, there's a 'Task' icon and the title 'New Task'. A 'Help for this Page' link with a question mark icon is on the right. Below the title bar, there's a 'Task Edit' section with buttons for 'Save', 'Save & New Task', 'Save & New Event', and 'Cancel'. The main form is divided into two sections: 'Task Information' and 'Additional Information'. The 'Task Information' section includes fields for 'Assigned To' (Justin Davis), 'Subject' (Call Back), 'Due Date' (11/22/2015), 'Related To' (Account: TGI Enterprises), and 'Name' (Contact). The 'Additional Information' section includes fields for 'Status' (Not Started), 'Priority' (Normal), 'Phone', and 'Email'. A red vertical bar next to the 'Assigned To' and 'Subject' fields indicates required information. A legend at the top right of the 'Task Information' section states 'I = Required Information'.

**Task**  
New Task

Help for this Page ?

**Task Edit** Save Save & New Task Save & New Event Cancel

**Task Information** I = Required Information

Assigned To Justin Davis Related To Account TGI Enterprises

Subject Call Back Name Contact

Due Date 11/22/2015 [ 11/22/2015 ]

Description

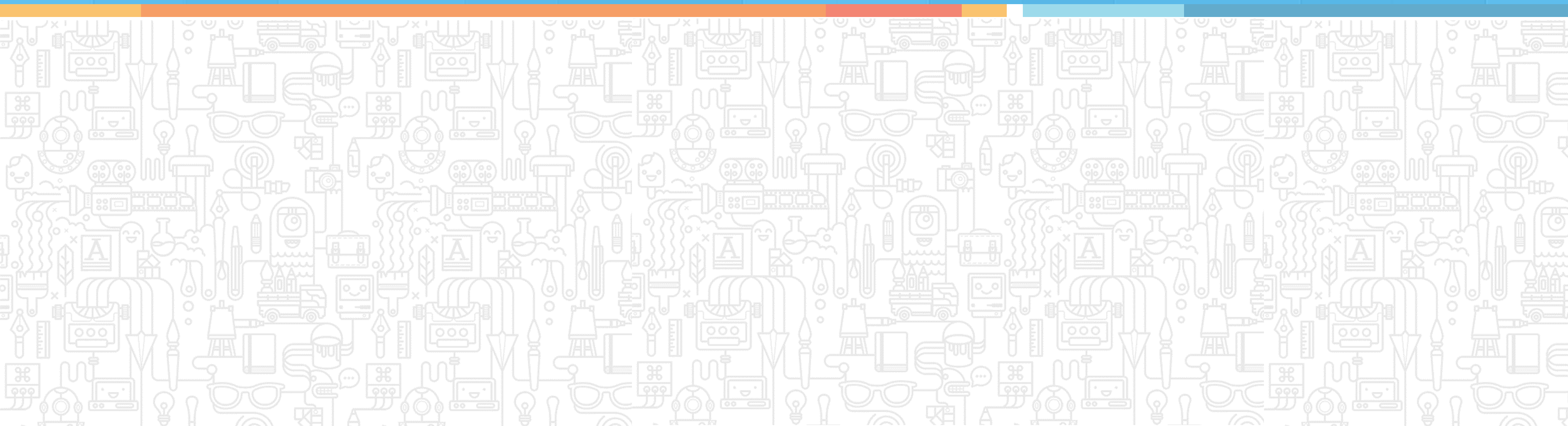
**Additional Information**

Status Not Started Phone

Priority Normal Email



# 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

## Web-to-Lead Setup

Easily set up a page on your website to capture new leads.

### Create a Web-to-Lead Form

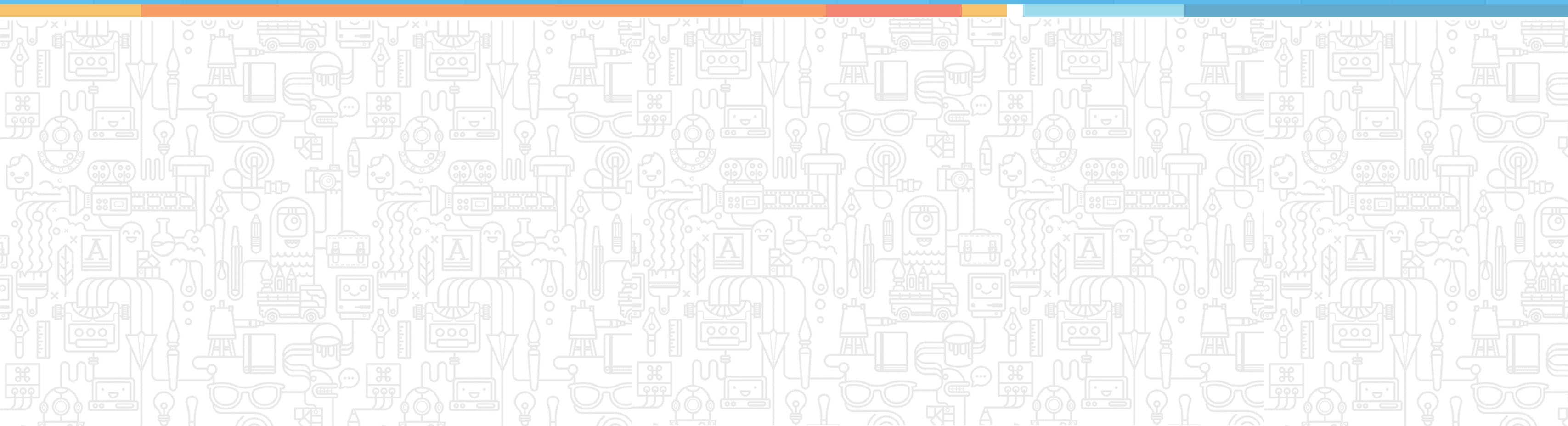
Select the fields to include on your Web-to-lead form:

Available Fields		Selected Fields	
Salutation	Add ▶	First Name	Up ▲
Title		Last Name	
Website	Remove ◀	Email	Down ▼
Phone		Company	
Mobile		City	
Fax		State/Province	
Street			
Zip			
Country			

Return URL

Language

# Creating 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

Lead Assignment Rule [Help for this Page](#) ?

### Inbound Leads

Add rule entries that specify the criteria used to route leads. You can reorder rule entries on this page after you create them.

Rule Detail		Edit
Rule Name	Inbound Leads	Active <input checked="" type="checkbox"/>
Created By	<u>Justin Davis</u> , 11/22/2015 11:53 PM	
Modified By	<u>Justin Davis</u> , 11/22/2015 11:54 PM	

Edit

Rule Entries					New	Reorder
Action	Order	Criteria	Assign To	Email		
<a href="#">Edit</a>   <a href="#">Del</a>	<input type="text" value="1"/>	Lead: City EQUALS Pasadena	<u>Justin Davis</u>	<input type="checkbox"/>		



# 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

Queue

[Help for this Page](#) ?

## Unassigned Lead Queue

<a href="#">Edit</a> <a href="#">Delete</a>			
Label	Unassigned Lead Queue	Queue Name	Unassigned_Lead_Queue
Queue Email		Send Email to Members	<input type="checkbox"/>
Supported Objects	Lead		
Created By	<a href="#">Justin Davis</a> , 11/22/2015 11:57 PM	Modified By	<a href="#">Justin Davis</a> , 11/22/2015 11:57 PM

<a href="#">View All Users</a>	
Name	Type
<a href="#">Chief Executive Officer</a>	Role
<a href="#">Project Manager</a>	Role
<a href="#">Ruchi Talwaria</a>	Role
<a href="#">Project Coordinator</a>	Role
<a href="#">Chief Legal Officer</a>	Role
<a href="#">Chief Accounting Officer</a>	Role
<a href="#">Office Manager</a>	Role

# 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

Web-to-Lead Auto-Response Rule

[Help for this Page](#) ?

## Active Rule

Add rule entries that specify the criteria and email template to use to respond to leads. You can reorder rule entries on this page after you create them.

### Rule Detail

Edit

Rule Name Active Rule

Active



Created By Justin Davis, 11/22/2015 11:59 PM

Modified By Justin Davis, 11/23/2015 12:00 AM

Edit

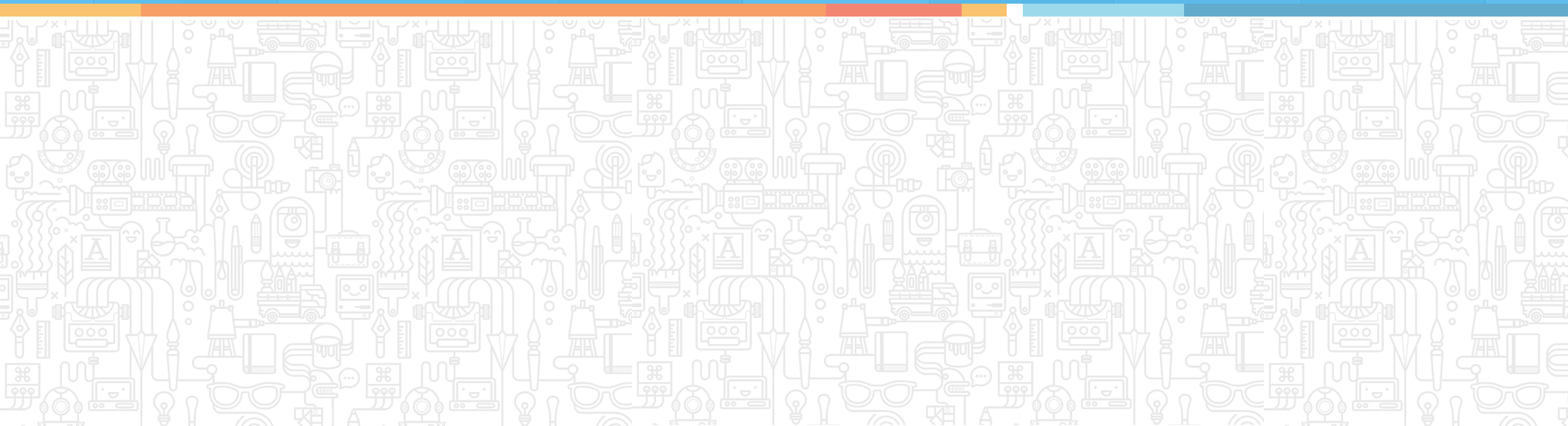
### Rule Entries

New

Reorder

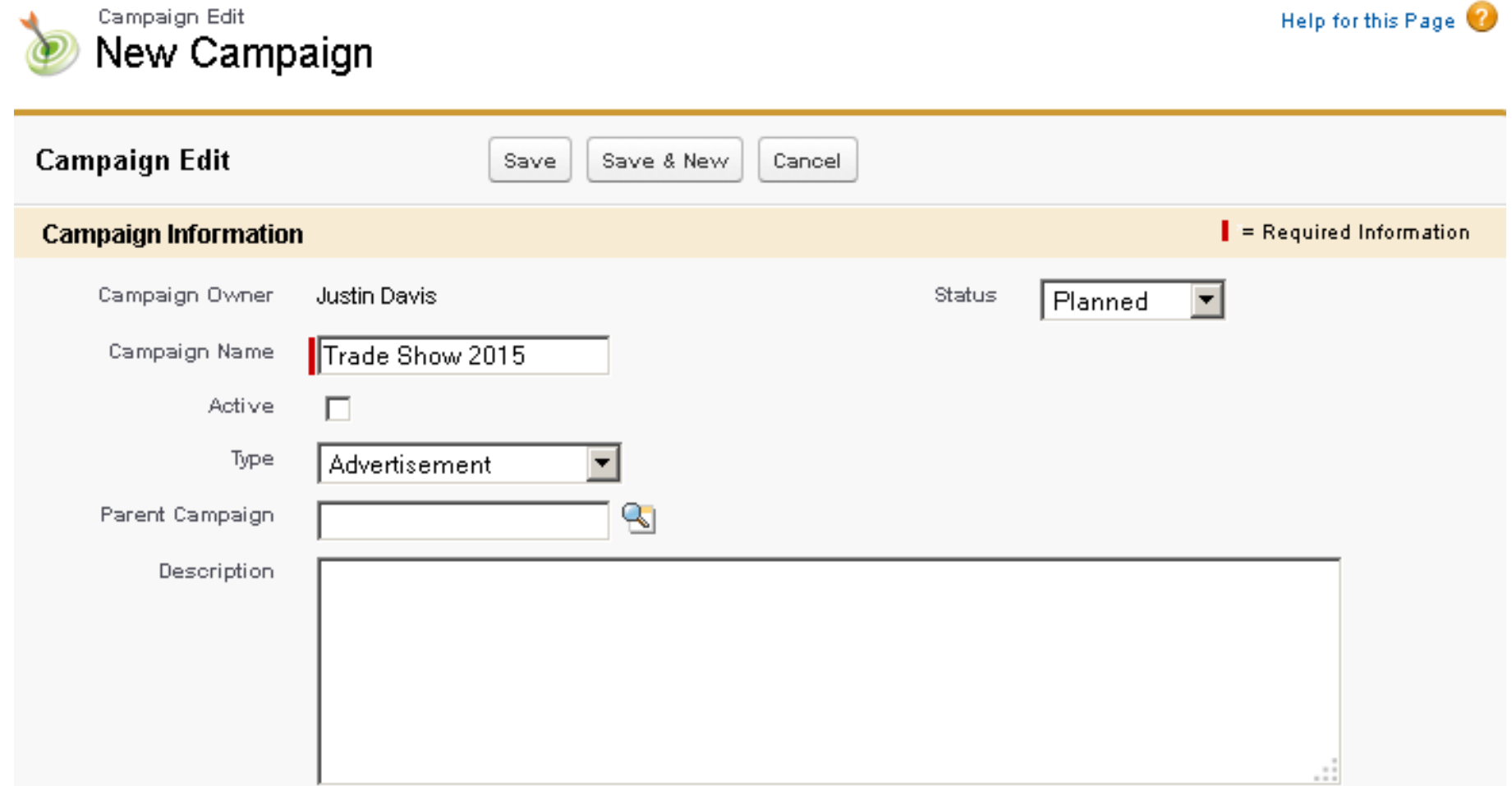
Action	Order	Criteria	Sent From (Email)	Template
<a href="#">Edit</a>   <a href="#">Del</a>	<input type="text" value="1"/>	Lead: City EQUALS Pasadena	Justin Davis (jdavis@cloudcreations.com)	<a href="#">New Lead</a>

# 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



The screenshot shows the 'New Campaign' form in the 'Campaign Edit' interface. The form is titled 'New Campaign' and includes a 'Help for this Page' link. The form is divided into sections: 'Campaign Information' and 'Campaign Edit'. The 'Campaign Information' section includes fields for 'Campaign Owner' (Justin Davis), 'Campaign Name' (Trade Show 2015), 'Active' (checkbox), 'Type' (Advertisement), 'Parent Campaign' (empty), and 'Description' (empty). The 'Campaign Edit' section includes buttons for 'Save', 'Save & New', and 'Cancel'. The 'Status' dropdown is set to 'Planned'. A red vertical bar next to the 'Campaign Name' field indicates required information.

Campaign Edit Help for this Page ?

**New Campaign**

**Campaign Edit** Save Save & New Cancel

**Campaign Information** ! = Required Information

Campaign Owner: Justin Davis Status: Planned

Campaign Name: Trade Show 2015

Active: ☐

Type: Advertisement

Parent Campaign:

Description:



# 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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Client</a>	Use this for all client account records	<input checked="" type="checkbox"/>	<a href="#">Justin Davis</a> , 11/20/2015 12:54 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Partner</a>	Use this for all partner account records	<input checked="" type="checkbox"/>	<a href="#">Justin Davis</a> , 6/30/2015 10:37 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Vendor</a>	Use this for all vendor account records	<input checked="" type="checkbox"/>	<a href="#">Justin Davis</a> , 6/30/2015 10:37 AM



## 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

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

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.'