PATHSTREAM

Opportunity Management in Salesforce

Independent Project: Use Salesforce to Close Sales Deals

Melanie Olisah

Part A Overview

1. **Task 1:** Update FoodStars.org Opportunity Record
2. **Task 2:** Update Yaloo Search Opportunity Record
3. **Task 3:** Use Opportunity Kanban
4. **Task 4:** Perform a Business Case Analysis

Part A, Task 1:

Update FoodStars.Org Opportunity Record

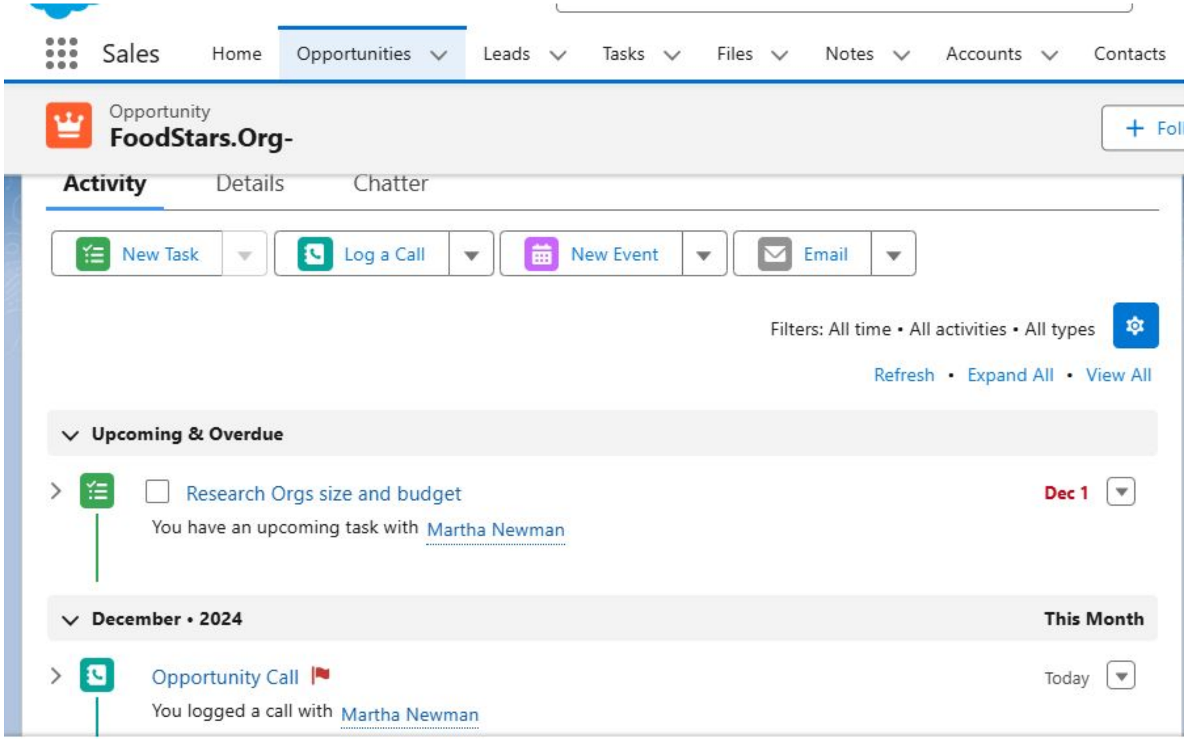
PATHSTREAM

Insert screenshots for each of these steps on the following slides to show the updates to the FoodStars.org opportunity record.

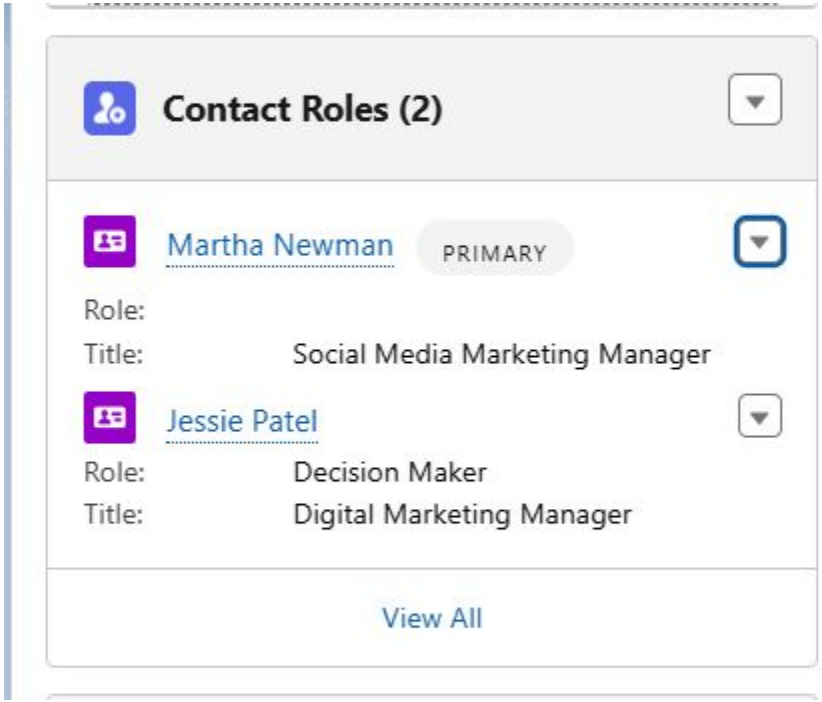
- *Make sure you can see the title of the opportunity in your screenshot*

Step 1: Past activities showing the call logged with Martha
Step 2: Contact roles section showing Jessie Patel has been added
Step 3: Notes section showing you added a note about licenses
Step 4: Past activities showing the event created to meet with Jessie
Step 5: Past activities showing the task created to confirm budget
Step 6: Sales path showing the opportunity is now in the “Value Proposition” stage

Part A, Task 1: Update FoodStars.Org Opportunity Record



Part A, Task 1: Update FoodStars.Org Opportunity Record



Part A, Task 1: Update FoodStars.Org Opportunity Record

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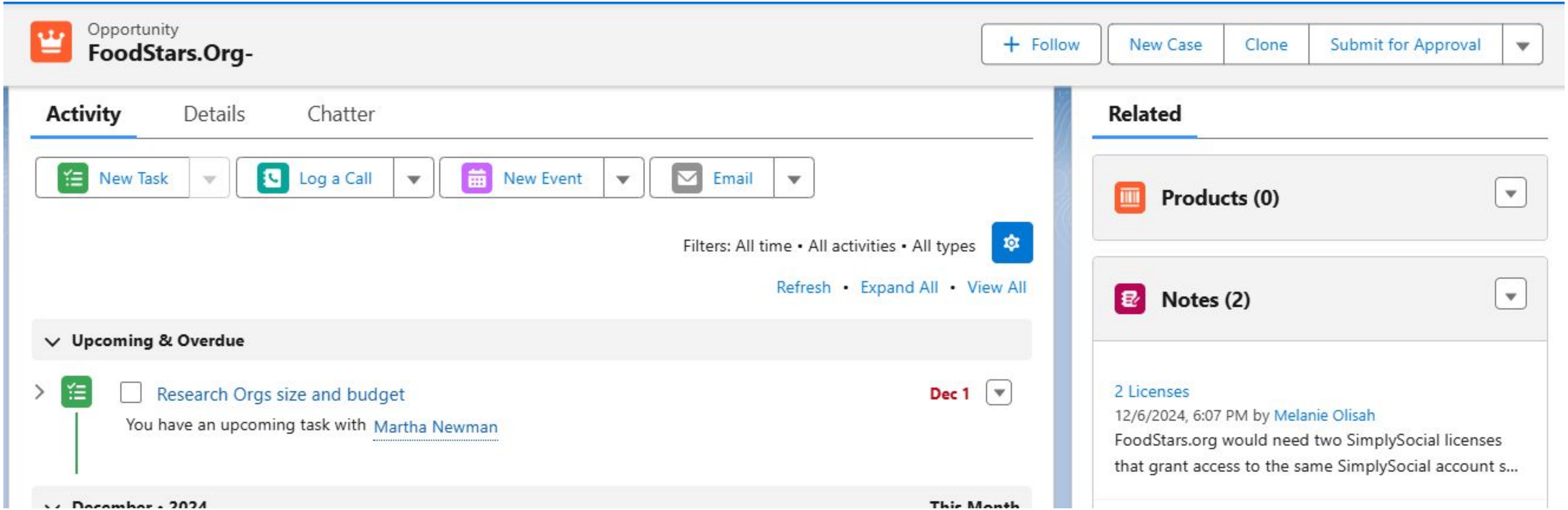
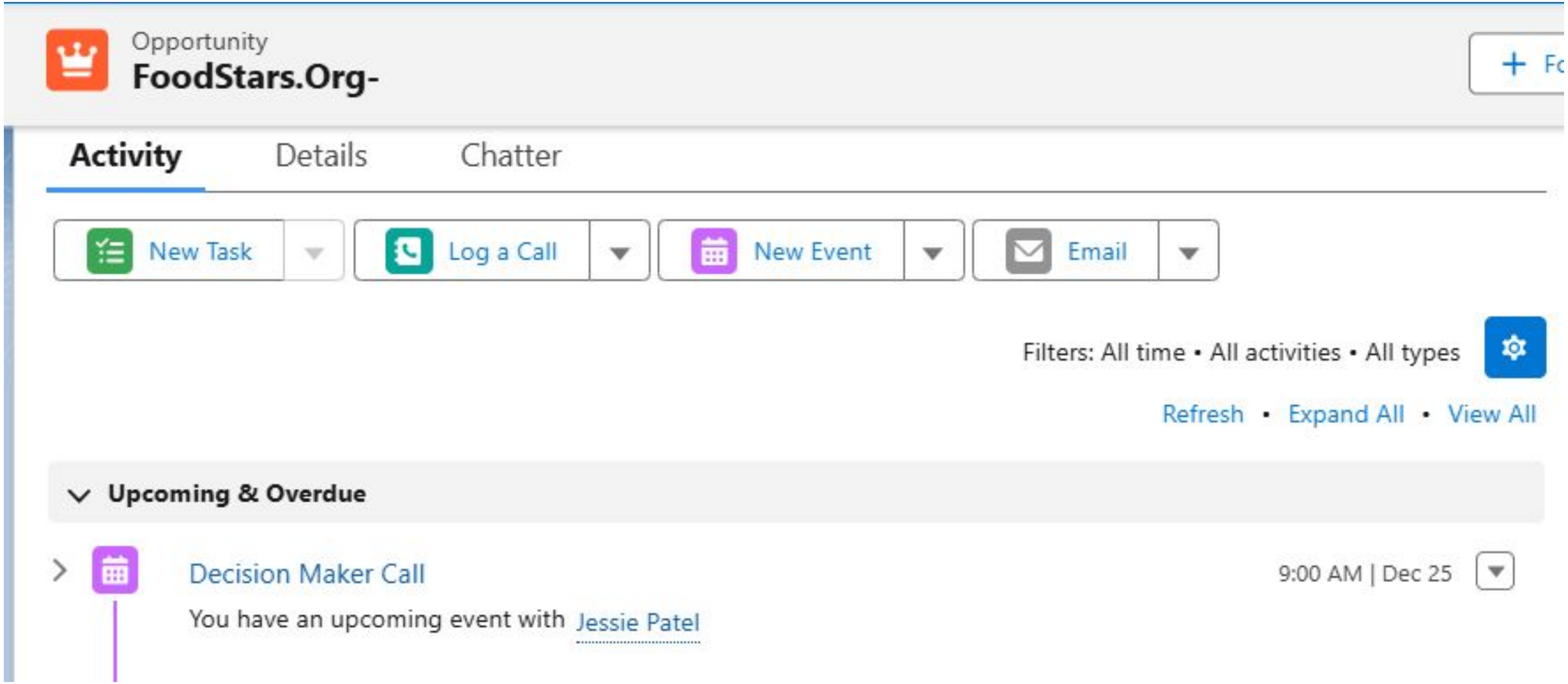
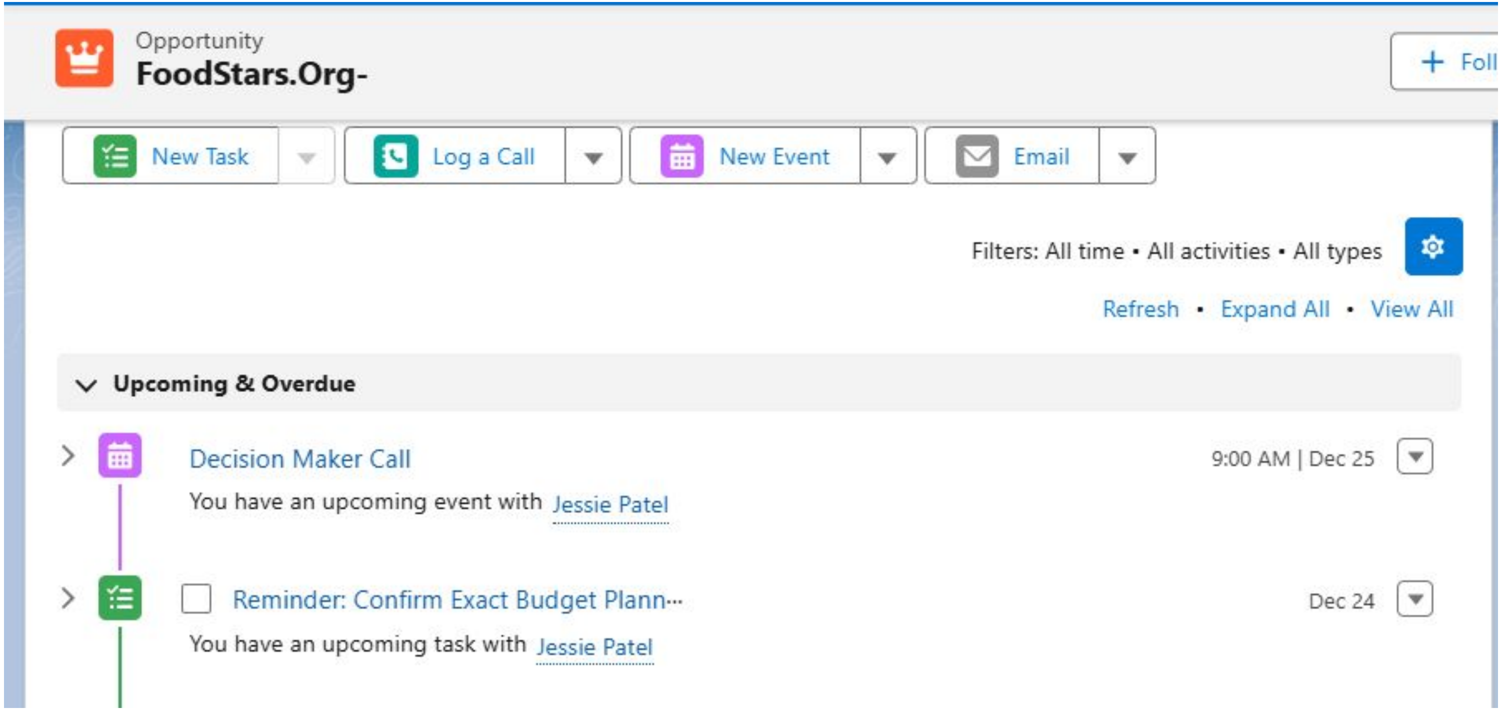


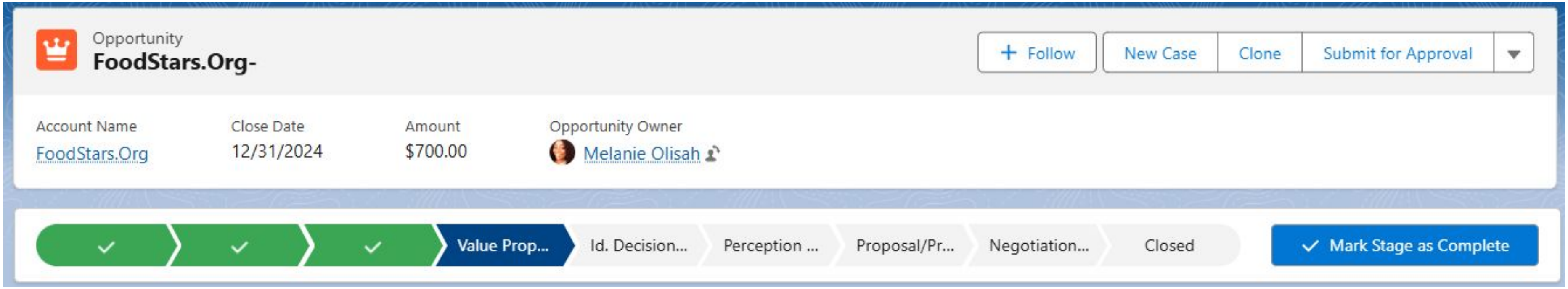
Part A, Task 1: Update FoodStars.Org Opportunity Record



Part A Task 1: Update FoodStars.Org Opportunity Record



Part A, Task 1: Update FoodStars.Org Opportunity Record



Part A, Task 2:

Update Yaloo Search Opportunity Record

PATHSTREAM

Insert screenshots for each of these steps on the following slides to show the updates to the Yaloo Search opportunity record.

- *Make sure you can see the title of the opportunity in your screenshot*

Step 1: Past activities showing the call logged with Denise
Step 2: Notes section showing you added a note about licenses
Step 3: Details tab showing you updated the opportunity amount
Step 4: Contact roles section showing Kenny and Wonhee have been added
Step 5: Past activities showing the event created for the demo
Step 6: Sales path showing the opportunity is now in the “Needs Analysis” Stage

Part A, Task 2:

Update Yaloo Search Opportunity Record

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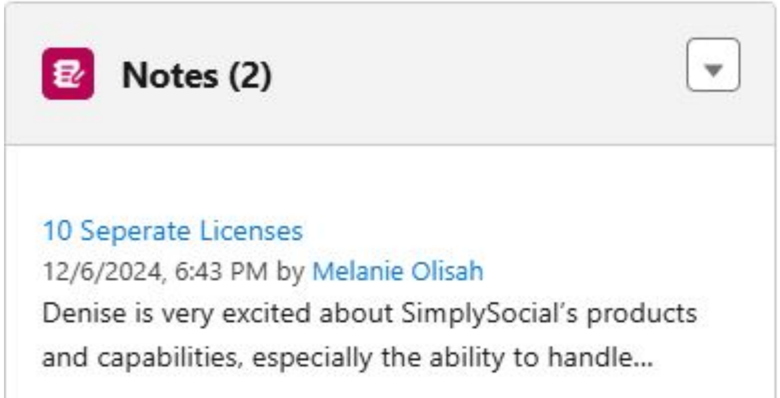
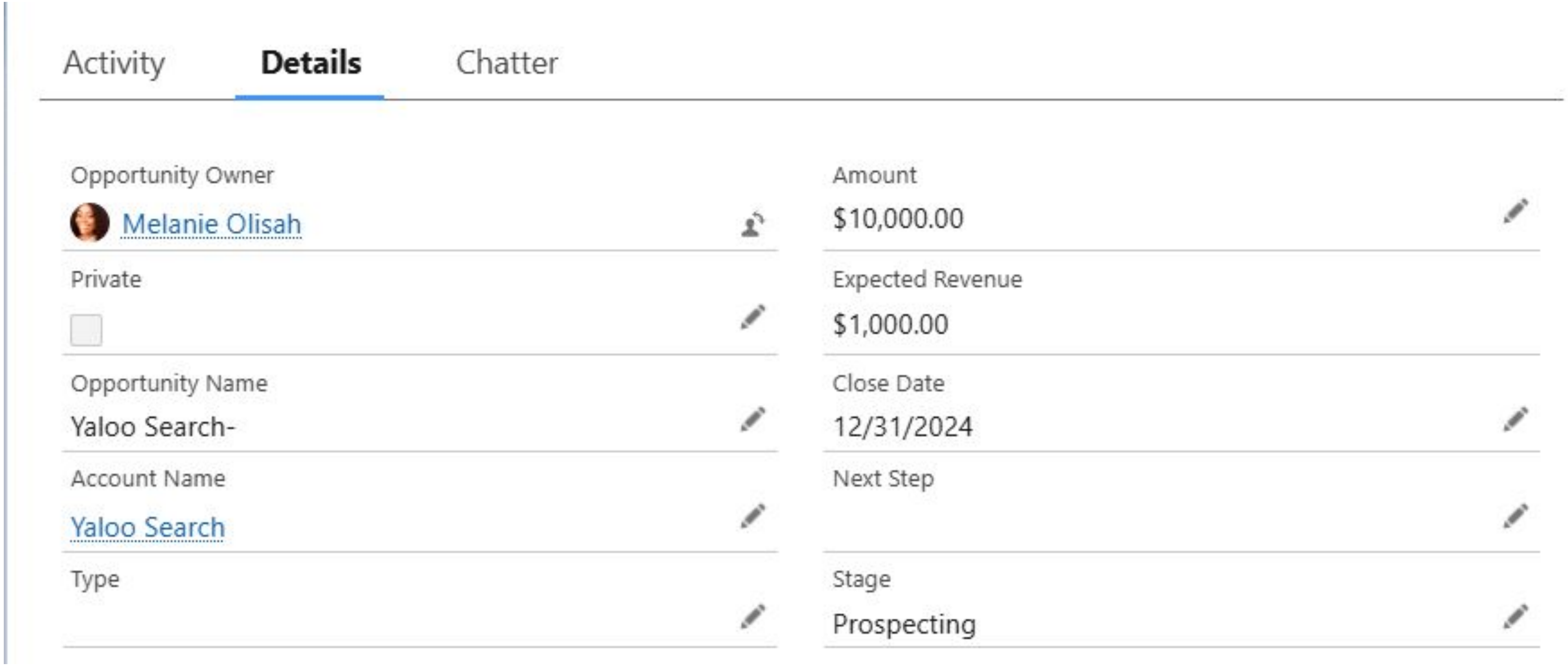
Update Yaloo Search Opportunity Record



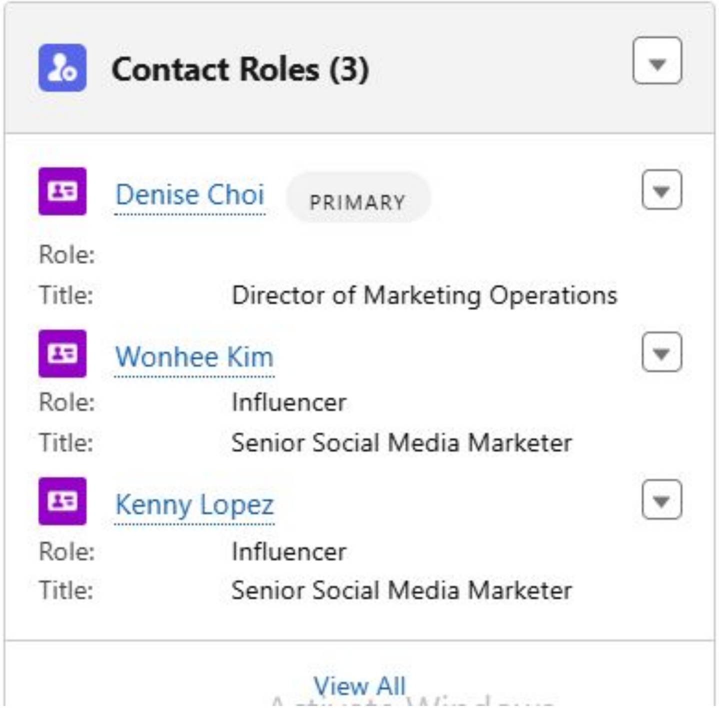
Part A, Task 2:

Update Yaloo Search Opportunity Record



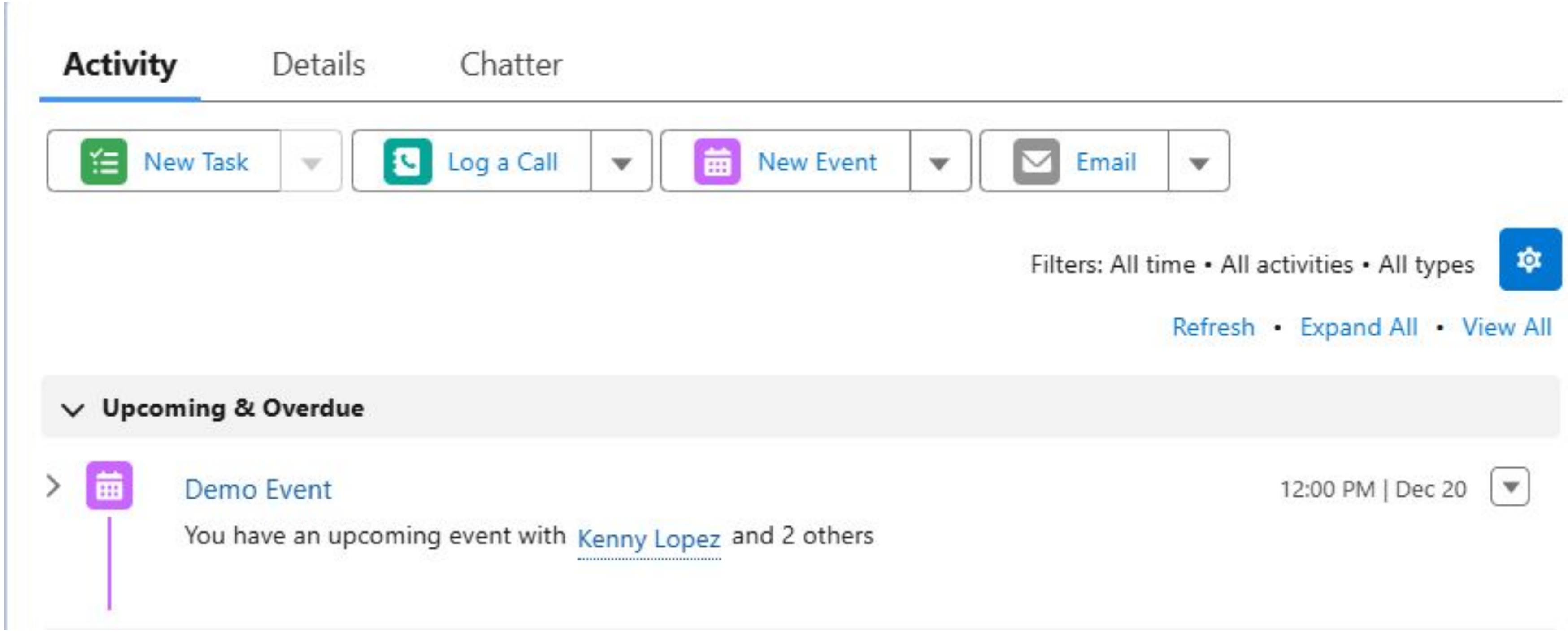
Part A, Task 2:

Update Yaloo Search Opportunity Record



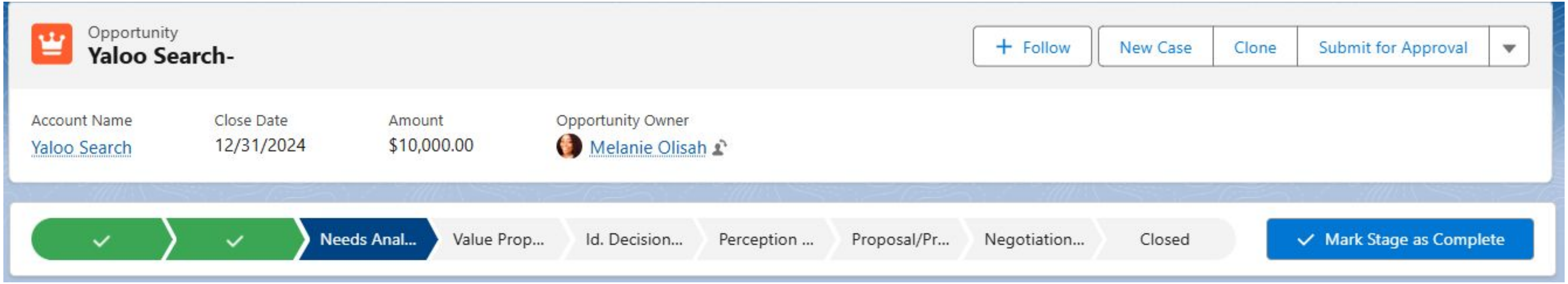
Part A, Task 2:

Update Yaloo Search Opportunity Record



Part A, Task 2:

Update Yaloo Search Opportunity Record

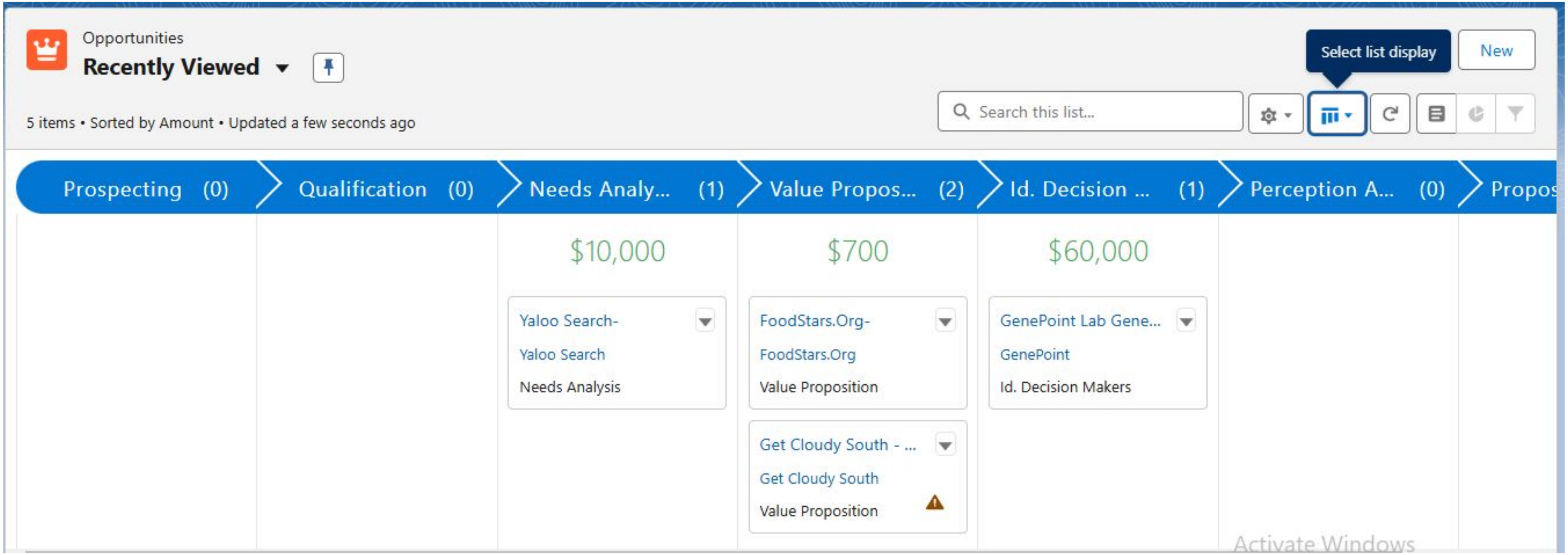


Part A, Task 3: Use Opportunity Kanban

PATHSTREAM

Insert a screenshot showing the updated opportunity Kanban board on the following slide. Make sure it displays which opportunity stages both the FoodStars.org and Yaloo Search opportunities are in as well as the estimated amounts attached to both.

Part A, Task 3: Use Opportunity Kanban



Part A, Task 4: Business Case Analysis

PATHSTREAM

In a short paragraph, describe how updating opportunity records, progressing opportunities through stages, and using opportunity Kanban in Salesforce would help SimplySocial's team of account executives sell better and more efficiently. In your description, include:

- The overall purpose of opportunity records, opportunity stages, and opportunity Kanban
- The steps you took to help the AE organize and progress opportunities through the stages.
- How a company like SimplySocial would benefit from using opportunities and opportunity stages

Part A, Task 4: Business Case Analysis

PATHSTREAM

Updating opportunity records, progressing opportunities through stages, and using the Opportunity Kanban in Salesforce allows SimplySocial's the account executive, Amy, to manage her sales pipeline more efficiently. Opportunity records serve as the foundation for tracking key deal details, such as potential revenue, decision-makers, and expected close dates, while opportunity stages provide a clear framework for the sales process, from initial contact to closing. By leveraging the Opportunity Kanban, Amy can visually organize and prioritize her deals, drag and drop opportunities between stages, and quickly identify bottlenecks or at-risk deals. To help Amy, we ensured her opportunity records were consistently updated with accurate data, and streamlined the opportunity stages to align with SimplySocial's sales process. This approach enhances visibility into the sales pipeline, improves prioritization, and helps Amy focus on high-impact deals, ultimately driving better sales outcomes and operational efficiency.

You have reached the end of Part A!

Make sure your screenshots are embedded in the appropriate slides before moving on. Note that you will complete Part B of this Independent Project at the end of Week 4.

Part B Overview

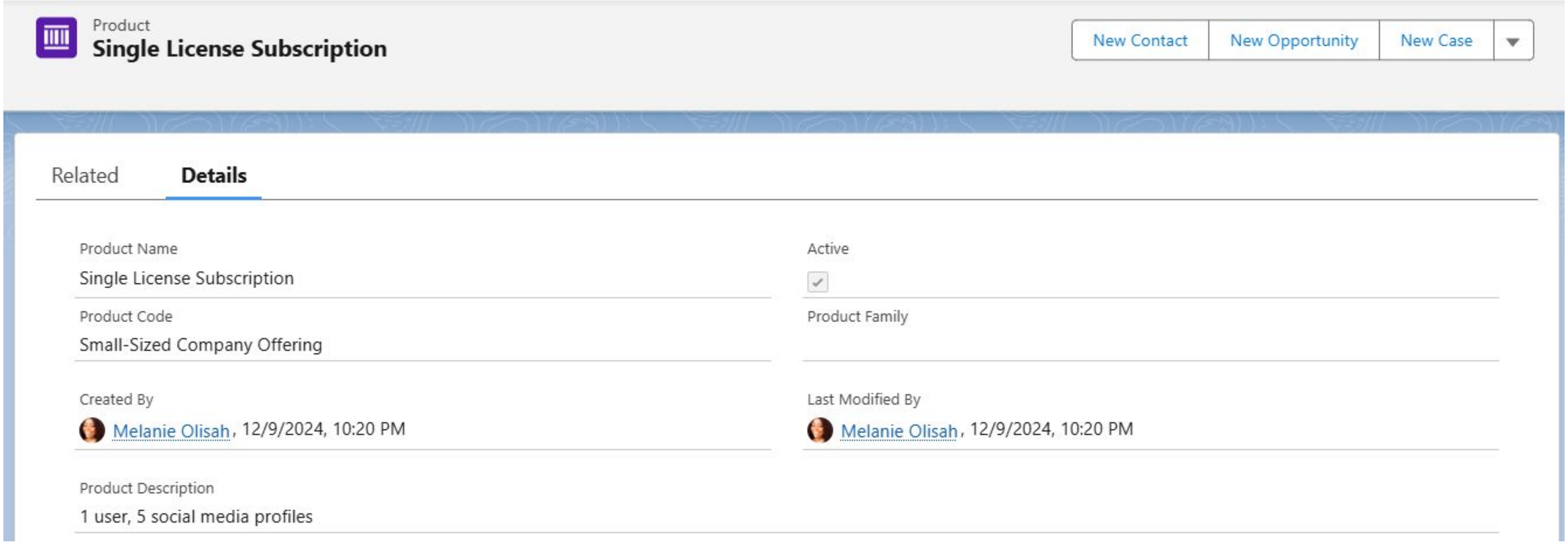
1. **Task 1:** Create Products
2. **Task 2:** Create Standard Price Books
3. **Task 3:** Create Custom Price Books
4. **Task 4:** Associate Price Books With Opportunities
5. **Task 5:** Create Quotes
6. **Task 6:** Send Quotes
7. **Task 7:** Close the Deal
8. **Task 8:** Create Contracts

Part B, Task 1: Create Products

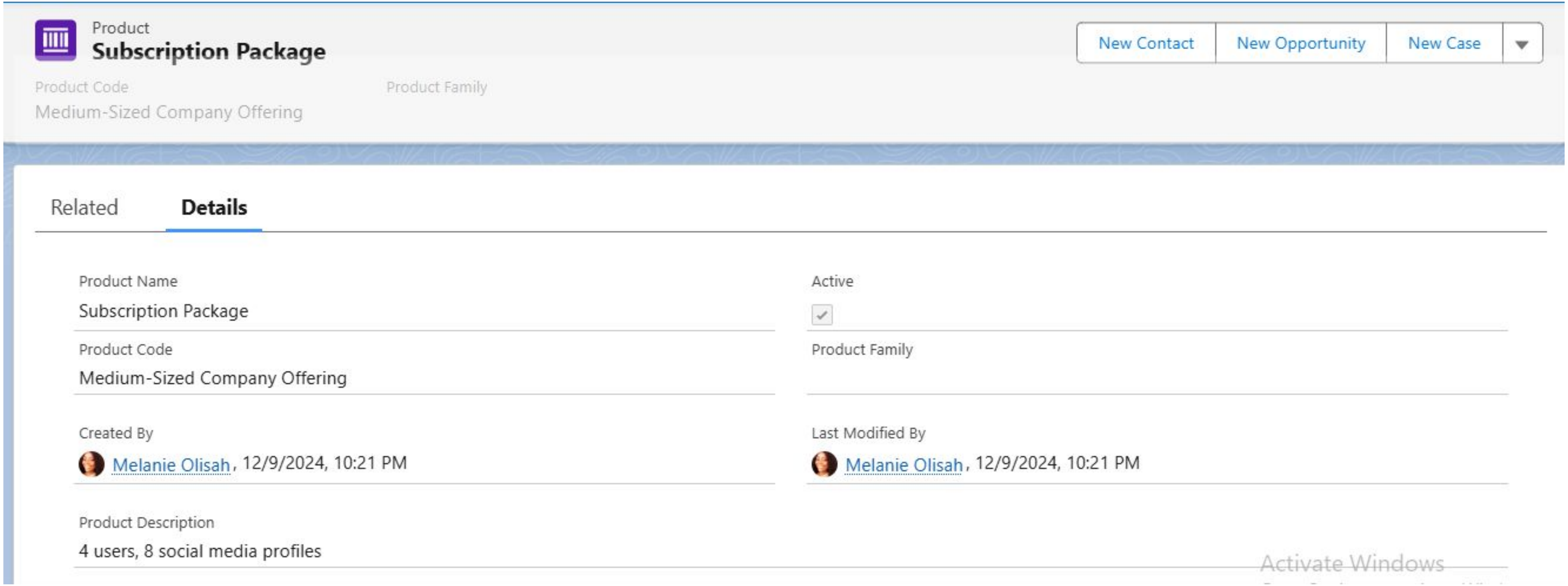
Insert screenshots for each of the new products you create. Make sure that you screenshot the product record page showing the name of the product as well as all the product details according to the specifications in the instructions.

Step 1: Product record page for the **single license subscription** product
Step 2: Product record page for the **subscription package** product
Step 3: Product record page for the **subscription package plus** product
Step 4: Product record page for the **extra user license** product

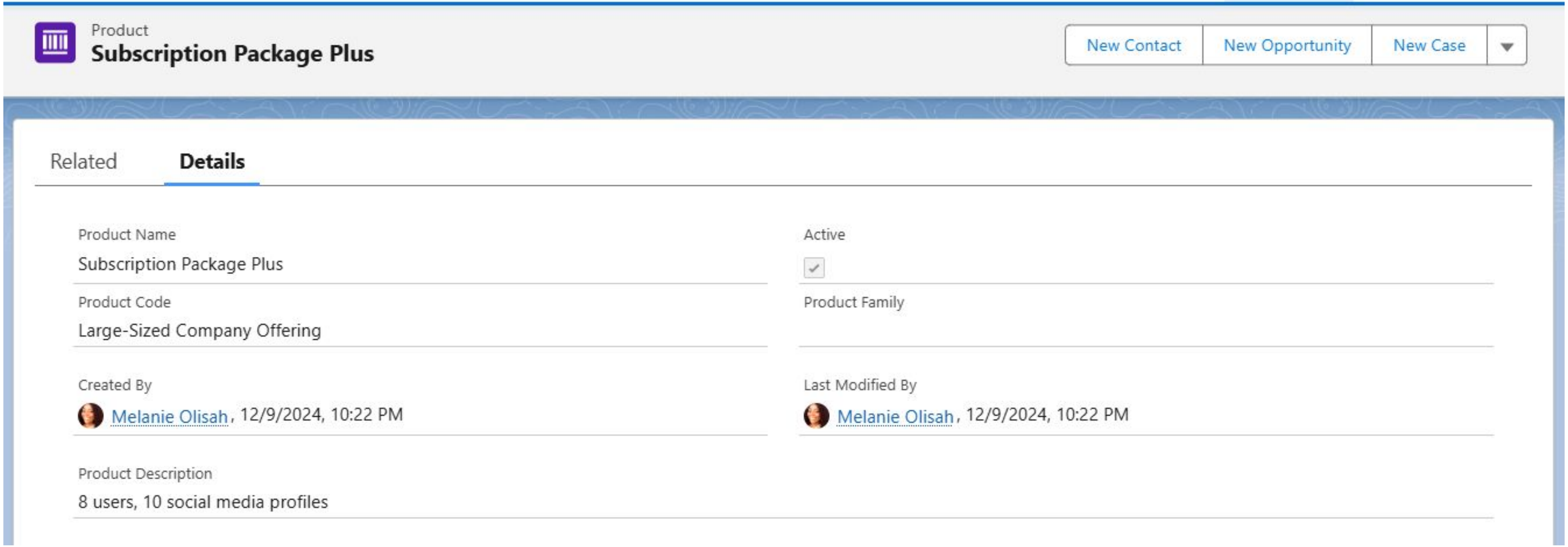
Part B, Task 1: Create Products



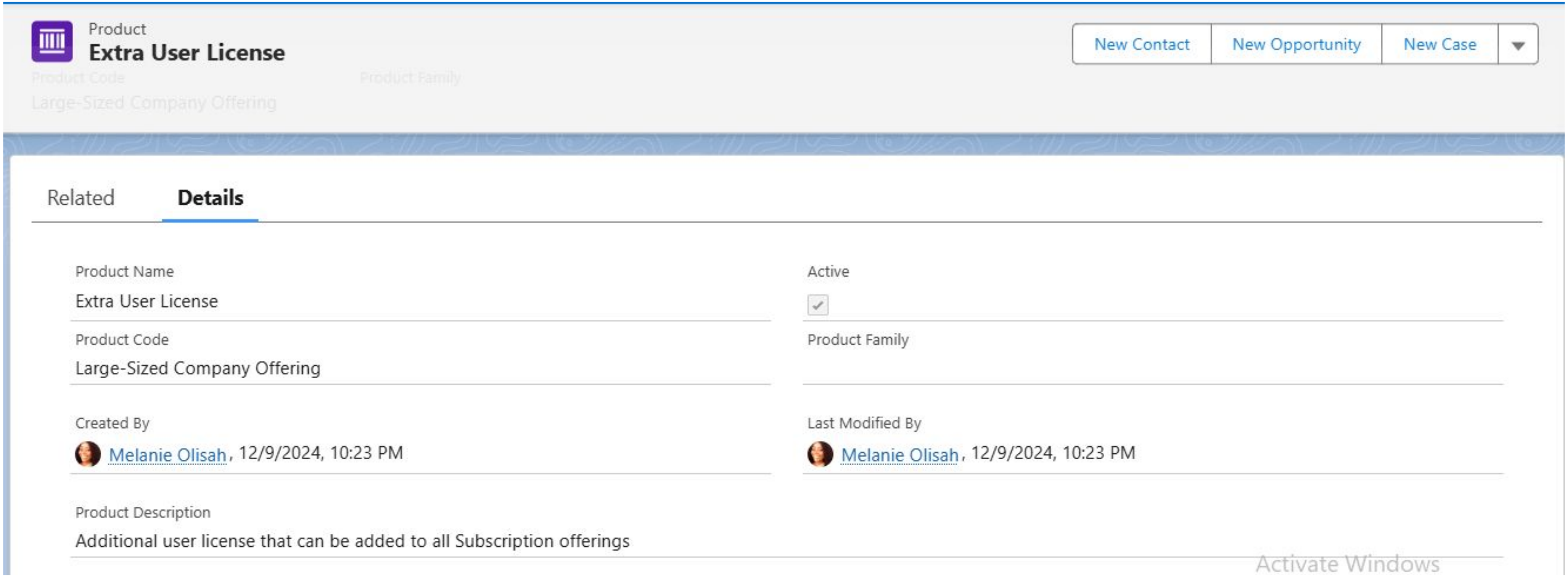
Part B, Task 1: Create Products



Part B, Task 1: Create Products



Part B, Task 1: Create Products



Part B, Task 2: Create Standard Price Books

Insert screenshots showing the standard price book entry, or list price, you've added for each of the products you created. Make sure your screenshot shows the name of the product as well as the standard price book and list price entry.

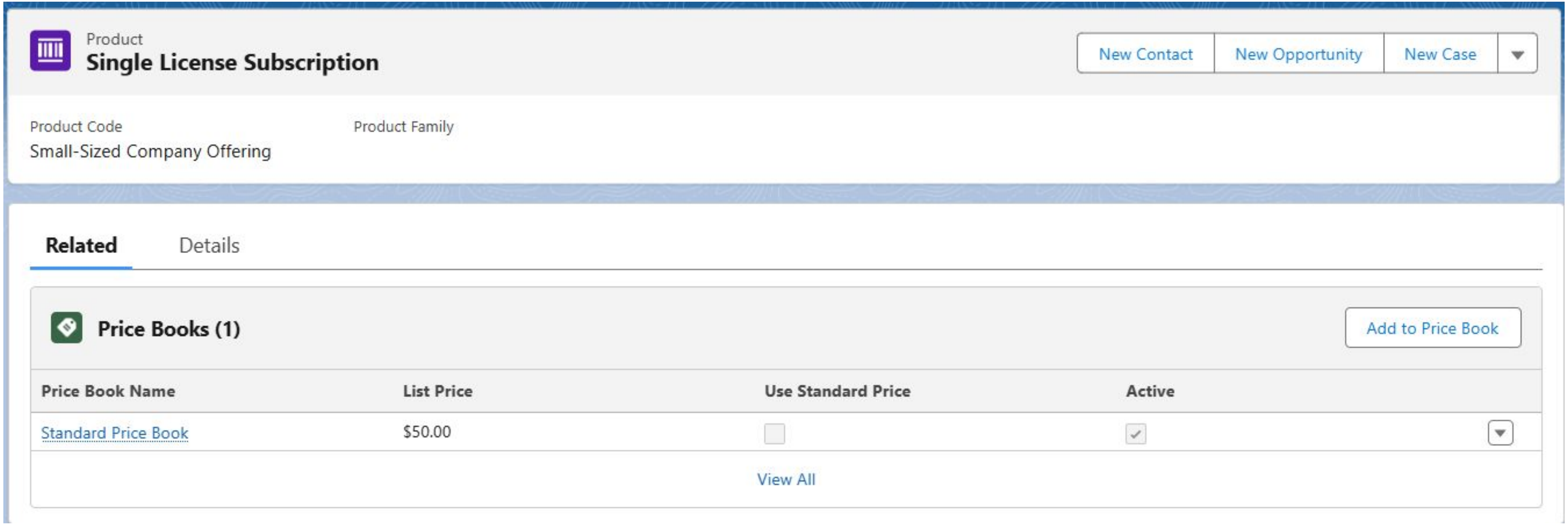
Step 1: Standard price book for the **single license subscription** product

Step 2: Standard price book for the **subscription package** product

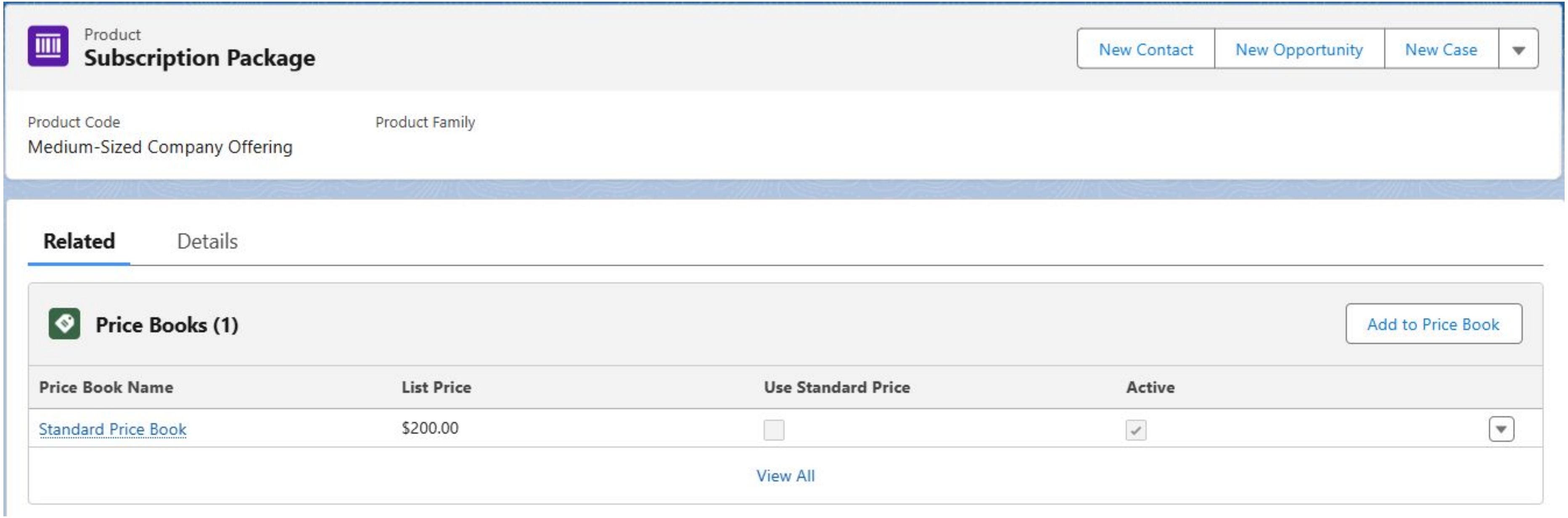
Step 3: Standard price book for the **subscription package plus** product

Step 4: Standard price book for the **extra user license** product

Part B, Task 2: Create Standard Price Books

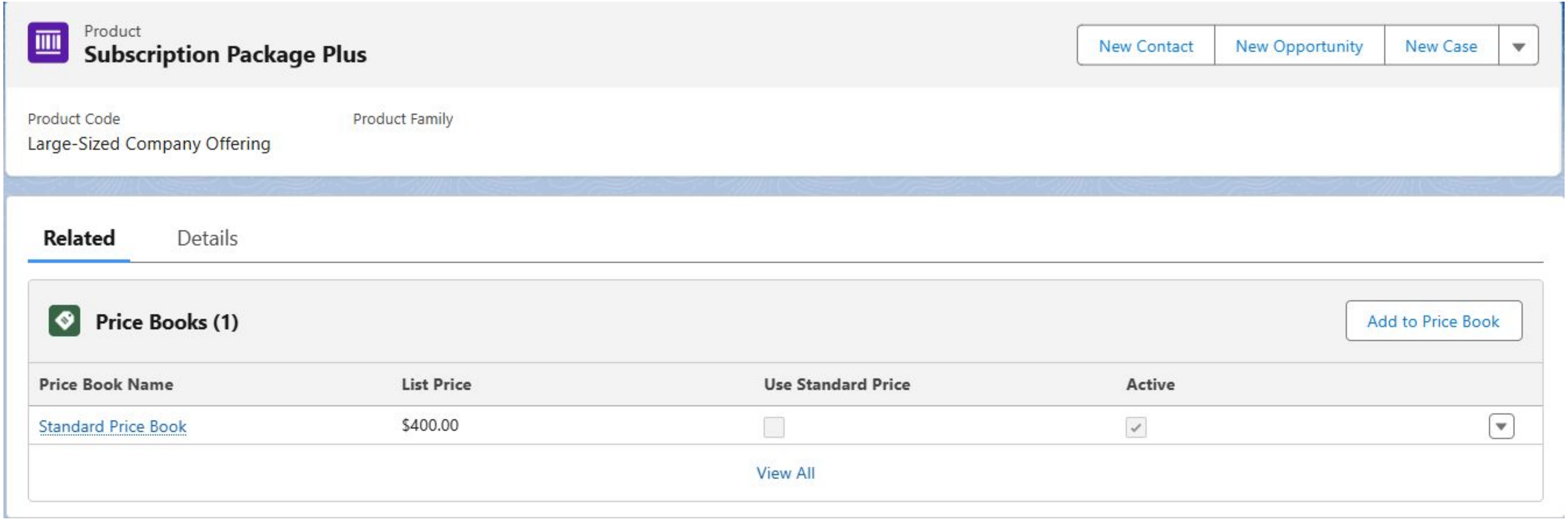


Part B, Task 2: Create Standard Price Books

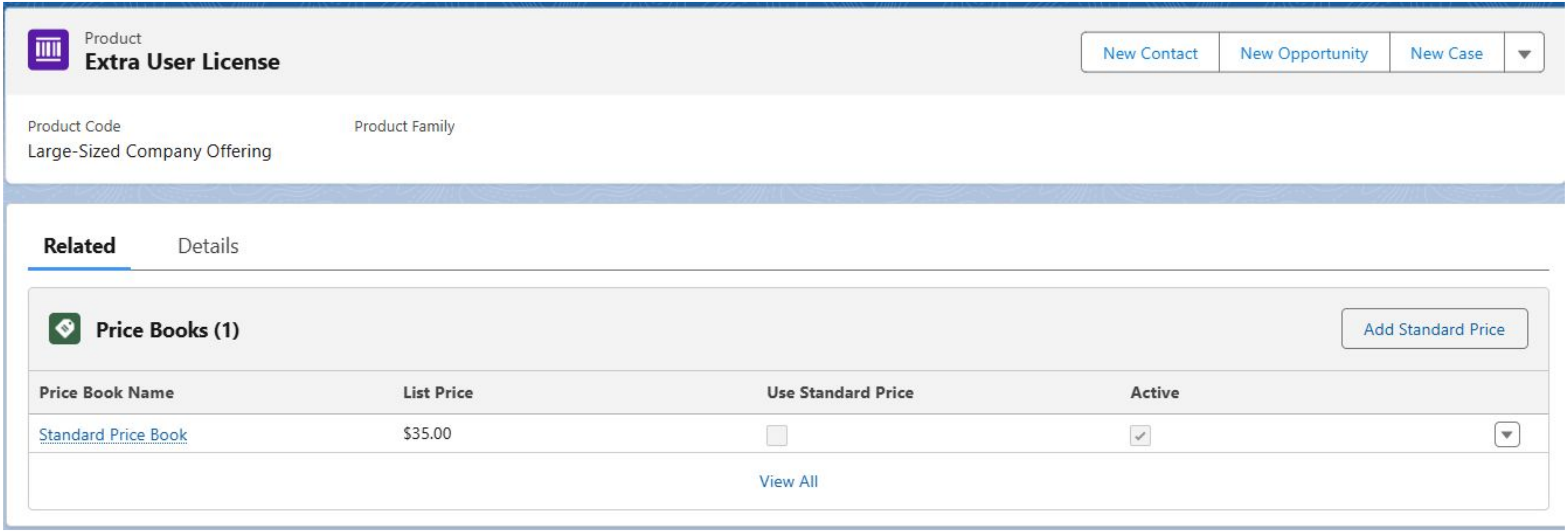


Part B, Task 2: Create Standard Price Books

PATHSTREAM



Part B, Task 2: Create Standard Price Books



Part B, Task 3: Create Custom Price Books

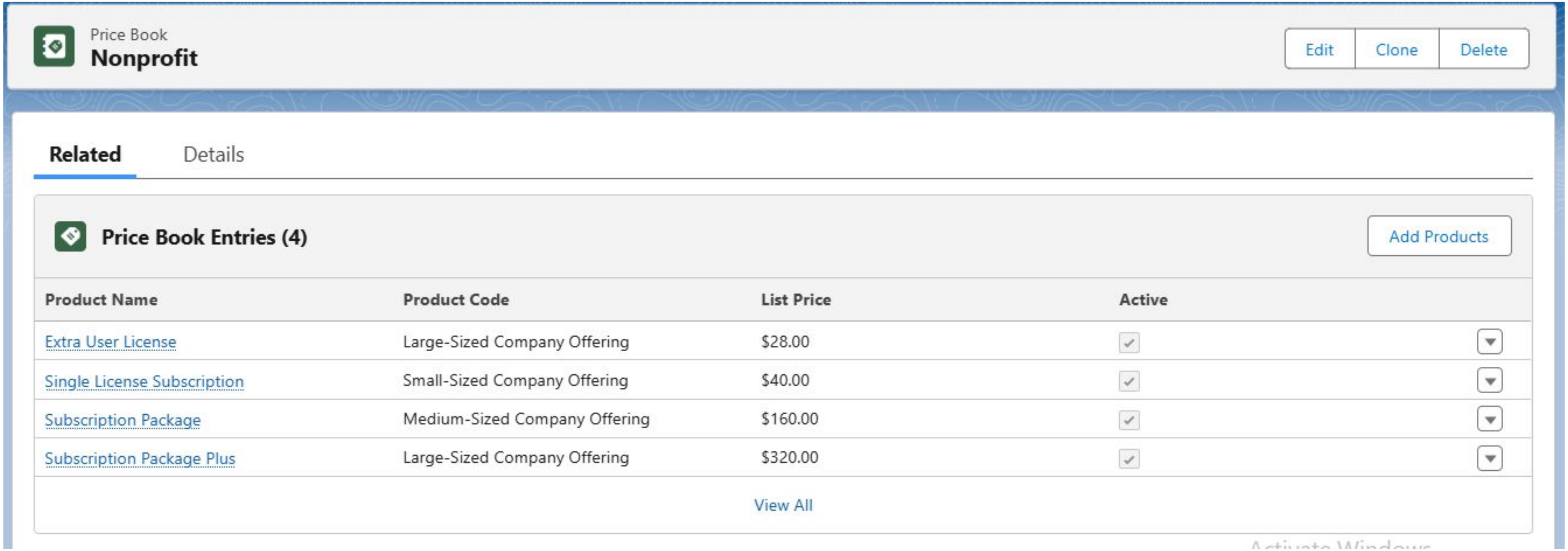
PATHSTREAM

Insert screenshots related to the custom price books you create, according to the following instructions:

Step 1: The new price book for **nonprofit customers** you just created and with the associated products

Step 2: The new price book for **enterprise customers** you just created with the associated products showing the new prices

Part B, Task 3: Create Custom Price Books



Product Name	Product Code	List Price	Active
Extra User License	Large-Sized Company Offering	$28.00	✓
Single License Subscription	Small-Sized Company Offering	$40.00	✓
Subscription Package	Medium-Sized Company Offering	$160.00	✓
Subscription Package Plus	Large-Sized Company Offering	$320.00	✓

View All

Part B, Task 3: Create Custom Price Books

PATHSTREAM

Price Book
Enterprise

Edit | Clone | Delete

Related Details

Price Book Entries (4)

Add Products

Product Name	Product Code	List Price	Active
Extra User License	Large-Sized Company Offering	$35.00	✓
Single License Subscription	Small-Sized Company Offering	$50.00	✓
Subscription Package	Medium-Sized Company Offering	$200.00	✓
Subscription Package Plus	Large-Sized Company Offering	$400.00	✓

View All

Part B, Task 4: Associate Price Books With Opportunities

PATHSTREAM

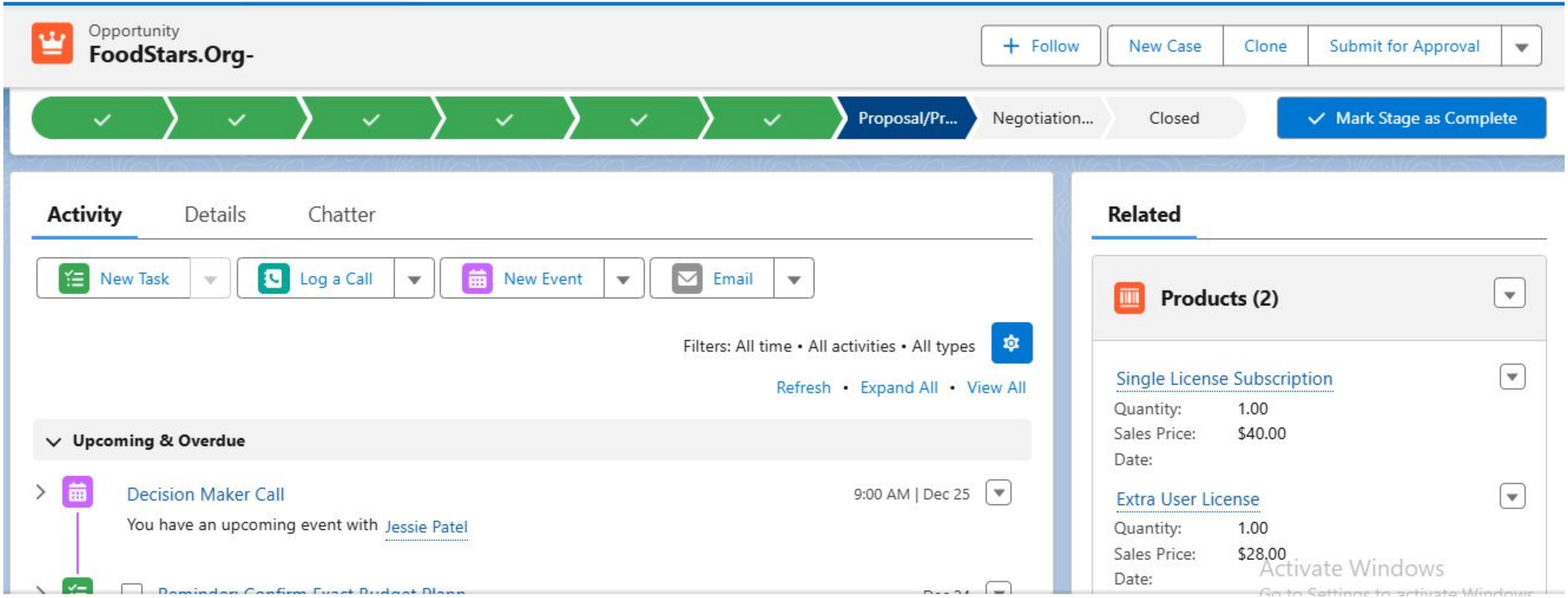
Insert screenshots of your two in-progress opportunities showing the correct price books and products added to the products section of the opportunity record page. For each screenshot, make sure the opportunity name is visible, along with the associated products and the correct prices, according to the following instructions:

Step 1: FoodStars.Org opportunity record showing products/prices

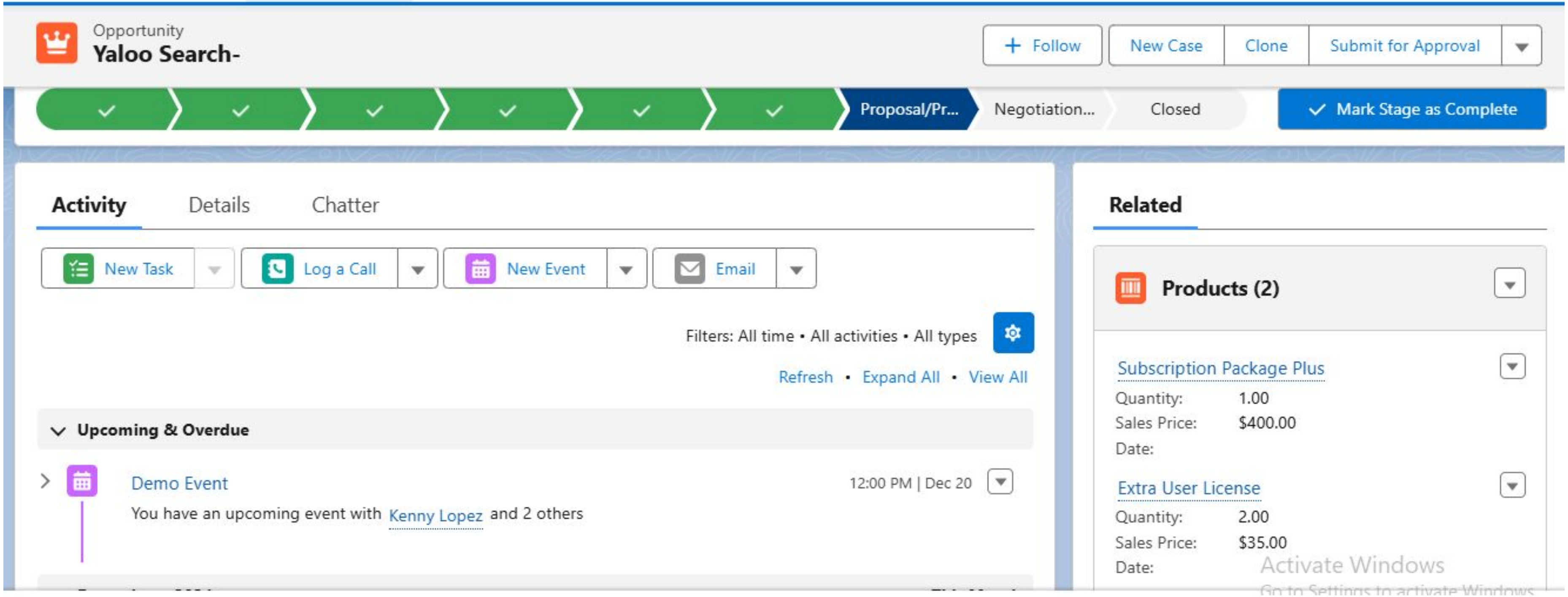
Step 2: Yaloo Search opportunity record showing products/prices

Part B, Task 4: Associate Price Books With Opportunities

PATHSTREAM



Part B, Task 4: Associate Price Books With Opportunities

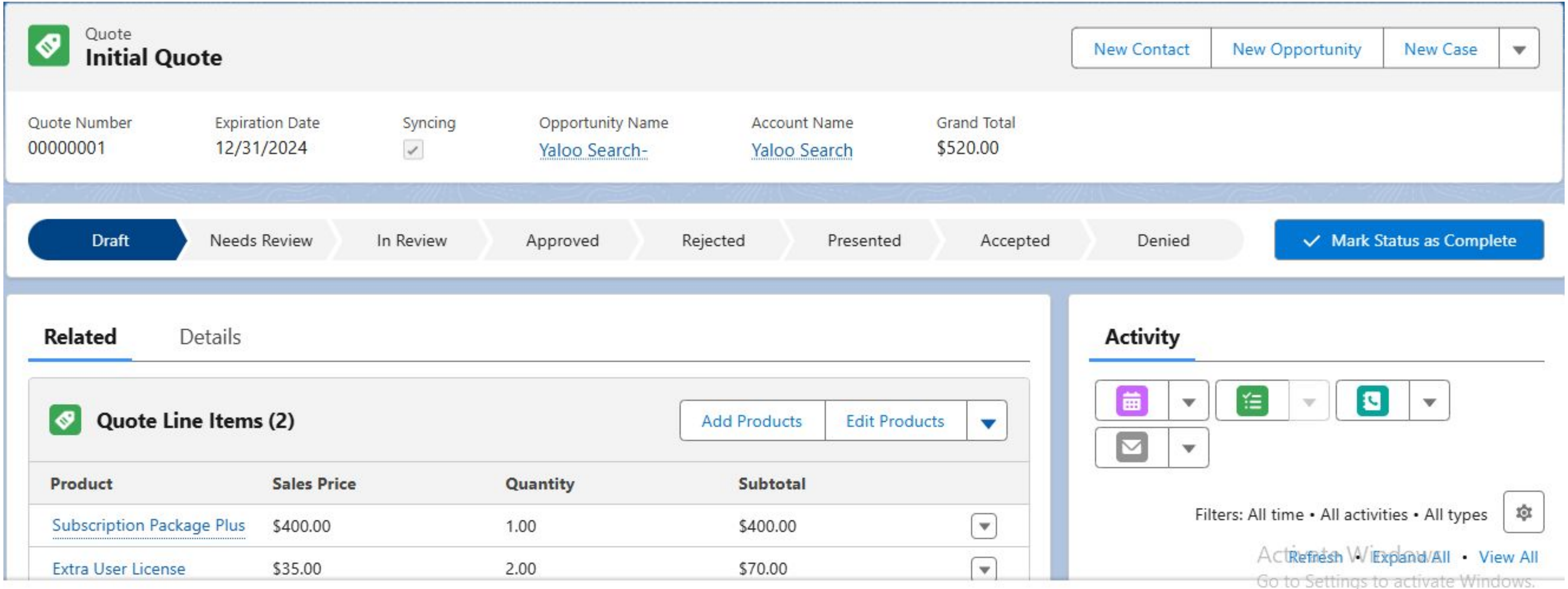


Part B, Task 5: Create Quotes

PATHSTREAM

On the following slide, insert a screenshot of the Initial Quote record page for the Yaloo Search opportunity that you just made. Make sure your screenshot shows the name of the quote, the name of the account and opportunity, the quote line items, the grand total, and the updated quote status.

Part B, Task 5: Create Quotes



Part B, Task 6: Send Quotes

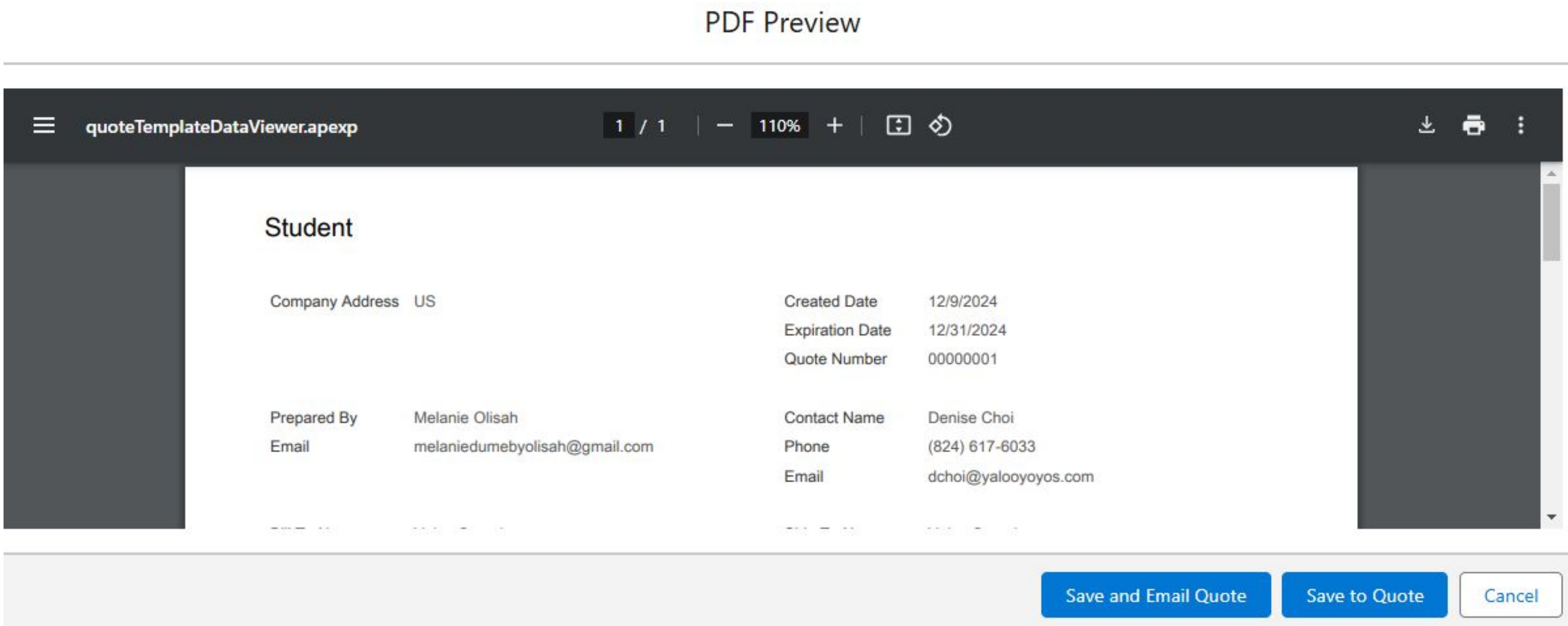
Insert screenshots related to the quote you generated on the following slides.

Step 1: The **PDF preview** of the initial quote

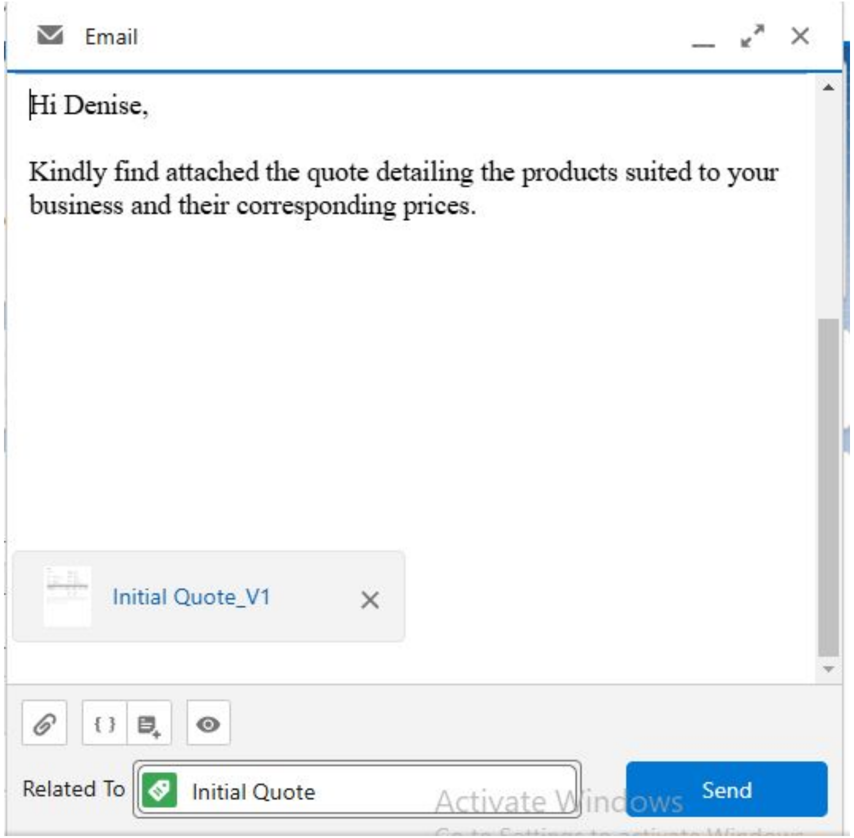
Step 2: The **draft email containing the PDF** of the initial quote that you will send to Denise.

- *Make sure that the PDF attachment is visible in the email.*

Part B, Task 6: Send Quotes



Part B, Task 6: Send Quotes



Part B, Task 7: Close the Deal

PATHSTREAM

Insert screenshots on the following slides showing you've correctly closed the Yaloo Search and FoodStars.org opportunities.

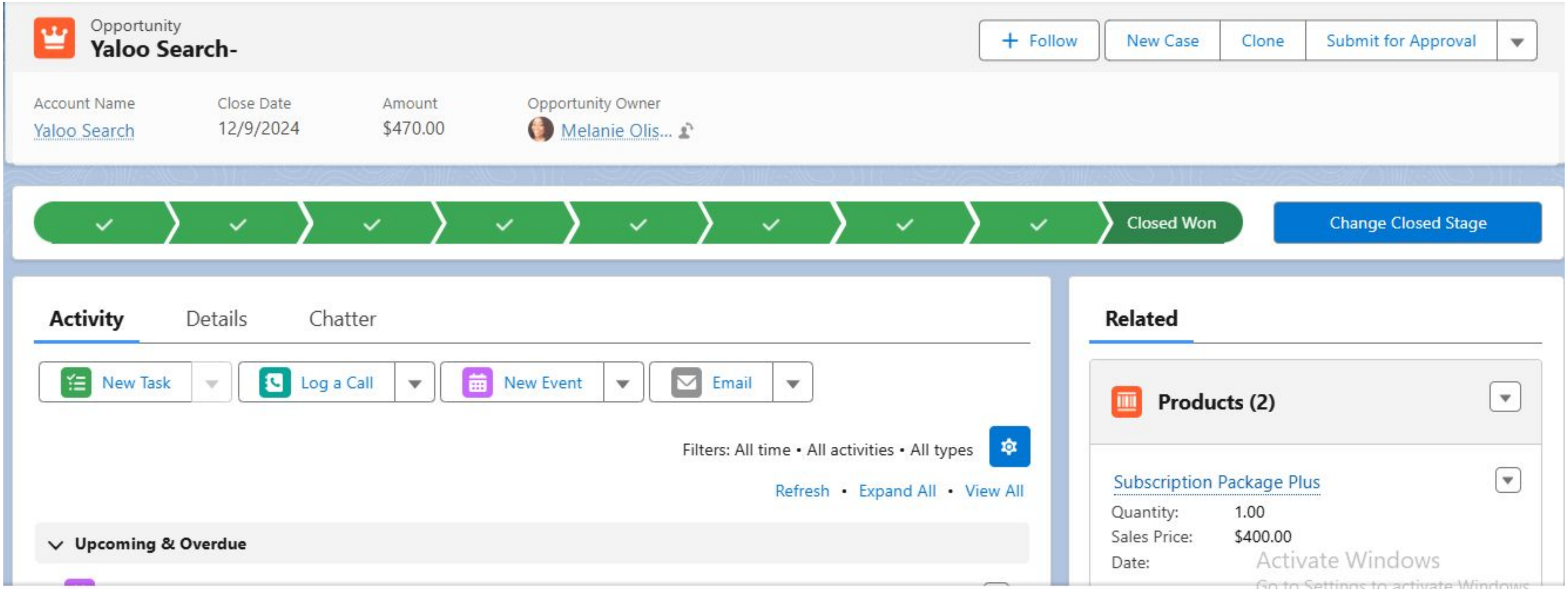
Step 1: Close the **Yaloo Search opportunity** as won.

- *Make sure your screenshot shows the opportunity stage status updated accordingly.*

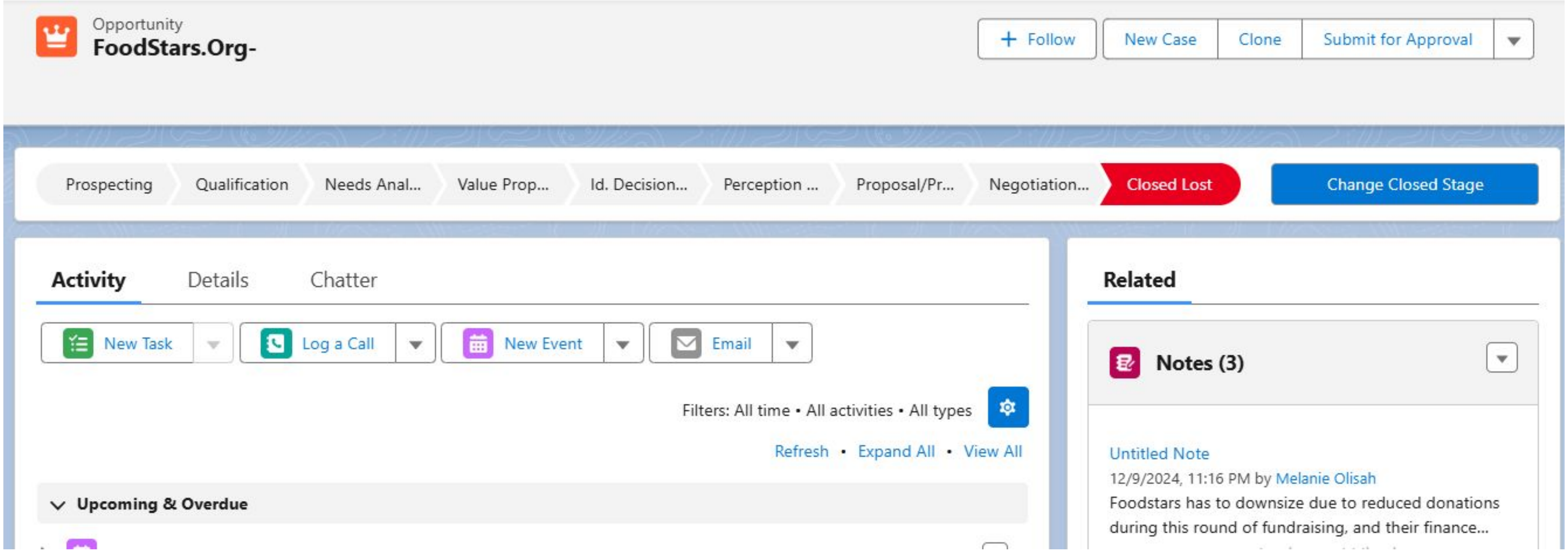
Step 2: Close the **FoodStars.org opportunity** as lost.

- *Make sure your screenshot show the opportunity stage updated accordingly and the note you created explaining why it was closed.*

Part B, Task 7: Close the Deal



Part B, Task 7: Close the Deal



Part B, Task 8: Create Contracts

On the following slide, insert a screenshot of the new contract for Yaloo Search that you've just created. Make sure the account name, status, and contract term are visible.

Part B, Task 8: Create Contracts