

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



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



The screenshot shows a web application interface for managing opportunities. At the top, a navigation bar includes links for Sales, Home, Opportunities (selected), Leads, Tasks, Files, Notes, Accounts, and Contacts. Below this, the page title is 'Opportunity FoodStars.Org-'. The main content area has tabs for Activity, Details, and Chatter. Under the Activity tab, there are buttons for 'New Task', 'Log a Call', 'New Event', and 'Email'. A filters section shows 'All time', 'All activities', and 'All types'. Below the filters, there are links for 'Refresh', 'Expand All', and 'View All'. The main list shows two items: 'Upcoming & Overdue' and 'December • 2024'. The first item is a task 'Research Orgs size and budget' due on 'Dec 1', with a note 'You have an upcoming task with Martha Newman'. The second item is a call 'Opportunity Call' from 'Today', with a note 'You logged a call with Martha Newman'.

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts

Opportunity FoodStars.Org- + Fol

Activity Details Chatter

New Task Log a Call New Event Email

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

> Research Orgs size and budget Dec 1

You have an upcoming task with Martha Newman

December • 2024 This Month



> Opportunity Call Today



You logged a call with Martha Newman

Part A, Task 1:



Update FoodStars.Org Opportunity Record



 **Contact Roles (2)** 

 Martha Newman PRIMARY 

Role:
Title: Social Media Marketing Manager

 Jessie Patel 


Role: Decision Maker
Title: Digital Marketing Manager

[View All](#)

Part A, Task 1:

Update FoodStars.Org Opportunity Record



 Opportunity
FoodStars.Org-

+ Follow

New Case

Clone

Submit for Approval

▼


ActivityDetailsChatter

New Task▼

Log a Call▼


New Event▼

Email▼

Filters: All time • All activities • All types 

[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue

> 

☐ Research Orgs size and budget


Dec 1 ▼


You have an upcoming task with [Martha Newman](#)

December 2024

This Month

Related

 **Products (0)** ▼

 **Notes (2)** ▼

[2 Licenses](#)


12/6/2024, 6:07 PM by [Melanie Olisah](#)

FoodStars.org would need two SimplySocial licenses that grant access to the same SimplySocial account s...

Part A, Task 1:


Update FoodStars.Org Opportunity Record





 Opportunity
FoodStars.Org-


[+ Fe](#)


Activity Details Chatter

 New Task ▼

 Log a Call ▼


 New Event ▼

 Email ▼

Filters: All time • All activities • All types 

[Refresh](#) • [Expand All](#) • [View All](#)

▼ **Upcoming & Overdue**

> 

Decision Maker Call


You have an upcoming event with [Jessie Patel](#)


9:00 AM | Dec 25 ▼


Part A Task 1:


Update FoodStars.Org Opportunity Record





 Opportunity
FoodStars.Org-

 New Task

 Log a Call


 New Event

 Email


Filters: All time • All activities • All types 


[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue


>  Decision Maker Call

You have an upcoming event with [Jessie Patel](#)

9:00 AM | Dec 25 

>  ☐ Reminder: Confirm Exact Budget Plann...

You have an upcoming task with [Jessie Patel](#)

Dec 24 

Part A, Task 1:

Update FoodStars.Org Opportunity Record



Opportunity
FoodStars.Org-

+ Follow

New Case

Clone

Submit for Approval



Account Name

[FoodStars.Org](#)

Close Date

12/31/2024

Amount

\$700.00

Opportunity Owner



[Melanie Olisah](#)



Value Prop...

Id. Decision...

Perception ...

Proposal/Pr...

Negotiation...

Closed

✓ Mark Stage as Complete

Part A, Task

2:

Update Yaloo Search Opportunity Record



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



Opportunity Call

You logged a call with [Denise Choi](#)

Today



Part A, Task

2:

Update Yaloo Search Opportunity Record



Notes (2)



[10 Seperate Licenses](#)

12/6/2024, 6:43 PM by [Melanie Olisah](#)

Denise is very excited about SimplySocial's products and capabilities, especially the ability to handle...

Part A, Task

2:

Update Yaloo Search Opportunity Record



Activity

Details

Chatter

Opportunity Owner



[Melanie Olisah](#)



Amount

\$10,000.00



Private



Expected Revenue

\$1,000.00

Opportunity Name

Yaloo Search-



Close Date

12/31/2024



Account Name

[Yaloo Search](#)



Next Step



Type



Stage

Prospecting







Part A, Task

2:

Update Yaloo Search Opportunity Record





 **Contact Roles (3)** 

 Denise Choi PRIMARY 



Role:

Title: Director of Marketing Operations

 Wonhee Kim 

Role: Influencer

Title: Senior Social Media Marketer

 Kenny Lopez 

Role: Influencer

Title: Senior Social Media Marketer

[View All](#)

Part A, Task

2:

Update Yaloo Search Opportunity Record



Activity

Details

Chatter



New Task



Log a Call



New Event



Email



Filters: All time • All activities • All types



[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue



Demo Event

12:00 PM | Dec 20



You have an upcoming event with [Kenny Lopez](#) and 2 others

Part A, Task

2:

Update Yaloo Search Opportunity Record



Opportunity
Yaloo Search-

+ Follow

New Case

Clone

Submit for Approval



Account Name

[Yaloo Search](#)

Close Date

12/31/2024

Amount

\$10,000.00

Opportunity Owner



[Melanie Olisah](#)



Needs Anal...

Value Prop...

Id. Decision...

Perception ...

Proposal/Pr...

Negotiation...


Closed


✓ Mark Stage as Complete

Part A, Task 3: Use Opportunity Kanban


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


 Opportunities


Recently Viewed ▾ 


5 items • Sorted by Amount • Updated a few seconds ago

















Select list display

Prospecting (0)

Qualification (0)


Needs Analy... (1)

Value Propos... (2)

Id. Decision ... (1)

Perception A... (0)

Propos

		\$10,000	\$700	\$60,000		
		<div>Yaloo Search- Yaloo Search Needs Analysis</div>	<div>FoodStars.Org- FoodStars.Org Value Proposition</div> <div>Get Cloudy South - ... Get Cloudy South Value Proposition </div>	<div>GenePoint Lab Gene... GenePoint Id. Decision Makers</div>		

Activate Windows

Part A, Task 4: Business Case Analysis



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



Product

Single License Subscription

[New Contact](#)

[New Opportunity](#)

[New Case](#)



Related

Details

Product Name

Single License Subscription

Product Code

Small-Sized Company Offering

Created By



[Melanie Olisah](#), 12/9/2024, 10:20 PM

Product Description

1 user, 5 social media profiles

Active



Product Family

Last Modified By



[Melanie Olisah](#), 12/9/2024, 10:20 PM

Part B, Task 1: Create Products



Product

Subscription Package

Product Code

Medium-Sized Company Offering

Product Family

New Contact

New Opportunity

New Case



Related

Details

Product Name

Subscription Package

Product Code

Medium-Sized Company Offering

Created By

 [Melanie Olisah](#), 12/9/2024, 10:21 PM

Product Description

4 users, 8 social media profiles

Active



Product Family

Last Modified By

 [Melanie Olisah](#), 12/9/2024, 10:21 PM

Activate Windows

Part B, Task 1: Create Products



Product

Subscription Package Plus

[New Contact](#)

[New Opportunity](#)

[New Case](#)



Related

Details

Product Name

Subscription Package Plus

Product Code

Large-Sized Company Offering

Created By



[Melanie Olisah](#), 12/9/2024, 10:22 PM

Active



Product Family

Last Modified By



[Melanie Olisah](#), 12/9/2024, 10:22 PM

Product Description

8 users, 10 social media profiles

Part B, Task 1: Create Products



Product

Extra User License

Product Code

Product Family

Large-Sized Company Offering

[New Contact](#)

[New Opportunity](#)

[New Case](#)



Related

Details

Product Name

Extra User License

Product Code

Large-Sized Company Offering

Created By



[Melanie Olisah](#), 12/9/2024, 10:23 PM

Product Description

Additional user license that can be added to all Subscription offerings

Active



Product Family

Last Modified By



[Melanie Olisah](#), 12/9/2024, 10:23 PM

Activate Windows

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



Product

Single License Subscription

[New Contact](#)

[New Opportunity](#)

[New Case](#)



Product Code

Product Family

Small-Sized Company Offering

Related

Details



Price Books (1)

[Add to Price Book](#)

Price Book Name

List Price

Use Standard Price

Active

[Standard Price Book](#)

\$50.00

☐

[View All](#)

Part B, Task 2: Create Standard Price Books



Product

Subscription Package

[New Contact](#)

[New Opportunity](#)

[New Case](#)



Product Code

Product Family

Medium-Sized Company Offering

Related

Details



Price Books (1)

[Add to Price Book](#)

Price Book Name

List Price

Use Standard Price

Active

[Standard Price Book](#)

\$200.00



[View All](#)

Part B, Task 2: Create Standard Price Books



Product

Subscription Package Plus

[New Contact](#)

[New Opportunity](#)

[New Case](#)



Product Code

Product Family

Large-Sized Company Offering

Related

Details



Price Books (1)

[Add to Price Book](#)

Price Book Name

List Price

Use Standard Price

Active

[Standard Price Book](#)

\$400.00



[View All](#)

Part B, Task 2: Create Standard Price Books



Product

Extra User License

[New Contact](#)

[New Opportunity](#)

[New Case](#)



Product Code

Product Family

Large-Sized Company Offering

Related

Details



Price Books (1)

[Add Standard Price](#)

Price Book Name

List Price

Use Standard Price

Active

[Standard Price Book](#)

\$35.00



[View All](#)

Part B, Task 3: Create Custom Price Books



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



Price Book
Nonprofit

[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	\$28.00	<input checked="" type="checkbox"/>	▼
Single License Subscription	Small-Sized Company Offering	\$40.00	<input checked="" type="checkbox"/>	▼
Subscription Package	Medium-Sized Company Offering	\$160.00	<input checked="" type="checkbox"/>	▼
Subscription Package Plus	Large-Sized Company Offering	\$320.00	<input checked="" type="checkbox"/>	▼

[View All](#)

Activate Windows

Part B, Task 3: Create Custom Price Books



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	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>
Single License Subscription	Small-Sized Company Offering	\$50.00	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>
Subscription Package	Medium-Sized Company Offering	\$200.00	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>
Subscription Package Plus	Large-Sized Company Offering	\$400.00	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>

[View All](#)

Activate Windows

Part B, Task 4: Associate Price Books With Opportunities



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



Opportunity
FoodStars.Org-

[+ Follow](#) [New Case](#) [Clone](#) [Submit for Approval](#)

✓

✓

✓

✓

✓

✓

Proposal/Pr...

Negotiation...

Closed

✓ Mark Stage as Complete

Activity

Details

Chatter

New Task

Log a Call

New Event

Email

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue

>

Decision Maker Call

9:00 AM | Dec 25

You have an upcoming event with [Jessie Patel](#)

Products (2)

[Single License Subscription](#)

Quantity: 1.00
Sales Price: \$40.00
Date:

[Extra User License](#)

Quantity: 1.00
Sales Price: \$28.00
Date:

Part B, Task 4: Associate Price Books With Opportunities



Opportunity
Yaloo Search-

+ Follow

New Case

Clone

Submit for Approval



Proposal/Pr...

Negotiation...

Closed

✓ Mark Stage as Complete

Activity

Details

Chatter



New Task



Log a Call



New Event



Email

Filters: All time • All activities • All types



[Refresh](#) • [Expand All](#) • [View All](#)

✓ Upcoming & Overdue



Demo Event

12:00 PM | Dec 20



You have an upcoming event with [Kenny Lopez](#) and 2 others

Related



Products (2)



[Subscription Package Plus](#)



Quantity: 1.00
Sales Price: \$400.00
Date:

[Extra User License](#)



Quantity: 2.00
Sales Price: \$35.00
Date:

Activate Windows

Go to Settings to activate Windows

Part B, Task 5: Create Quotes

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



Quote Initial Quote

[New Contact](#)[New Opportunity](#)[New Case](#)

Quote Number
00000001

Expiration Date
12/31/2024

Syncing
☒

Opportunity Name
[Yaloo Search-](#)

Account Name
[Yaloo Search](#)

Grand Total
\$520.00

[Draft](#)[Needs Review](#)[In Review](#)[Approved](#)[Rejected](#)[Presented](#)[Accepted](#)[Denied](#)[✓ Mark Status as Complete](#)

Related

[Details](#)

Quote Line Items (2)

[Add Products](#)[Edit Products](#)

Product	Sales Price	Quantity	Subtotal	
Subscription Package Plus	\$400.00	1.00	\$400.00	
Extra User License	\$35.00	2.00	\$70.00	

Activity



Filters: All time • All activities • All types



Activate Windows
Go to Settings to activate Windows.

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



PDF Preview


 quoteTemplateDataViewer.apexp

1 / 1 | - 110% + |  

Student

Company Address	US	Created Date	12/9/2024
		Expiration Date	12/31/2024
		Quote Number	00000001
Prepared By	Melanie Olisah	Contact Name	Denise Choi
Email	melaniedumebyolisah@gmail.com	Phone	(824) 617-6033
		Email	dchoi@yalooyoyos.com

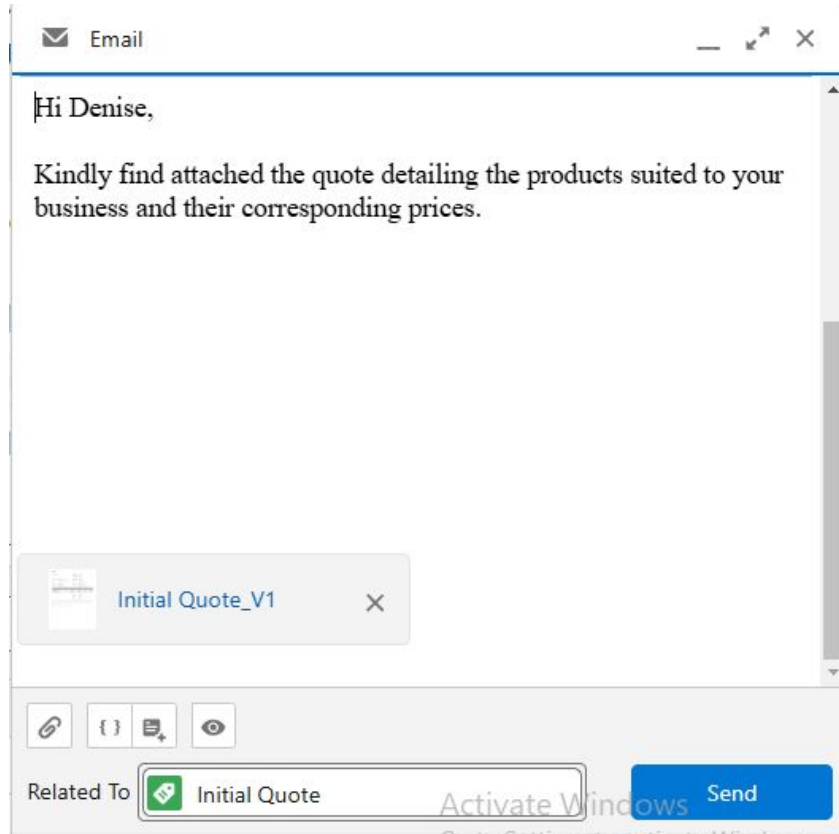


Save and Email Quote

Save to Quote

Cancel

Part B, Task 6: Send Quotes



Part B, Task 7: Close the Deal

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



Opportunity Yaloo Search-

[+ Follow](#)[New Case](#)[Clone](#)[Submit for Approval](#)

Account Name
[Yaloo Search](#)

Close Date
12/9/2024

Amount
\$470.00

Opportunity Owner
 [Melanie Olis...](#)

[Change Closed Stage](#)

Activity

[Details](#)[Chatter](#)[New Task](#)[Log a Call](#)[New Event](#)[Email](#)

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue

Related

Products (2)

[Subscription Package Plus](#)

Quantity: 1.00
Sales Price: \$400.00
Date:

Activate Windows

Go to Settings to activate Windows

Part B, Task 7: Close the Deal



Opportunity
FoodStars.Org-

+ Follow

New Case

Clone

Submit for Approval



Prospecting

Qualification

Needs Anal...

Value Prop...

Id. Decision...

Perception ...

Proposal/Pr...

Negotiation...

Closed Lost

Change Closed Stage

Activity

Details

Chatter

New Task

Log a Call

New Event

Email

Filters: All time • All activities • All types



[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

Related

Notes (3)

Untitled Note

12/9/2024, 11:16 PM by [Melanie Olisah](#)

Foodstars has to downsize due to reduced donations during this round of fundraising, and their finance...

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



Contract
00000100

Account Name

Yahoo Search

Status

Activated

Contract Start Date

12/10/2024

Contract End Date

12/9/2025

Contract Term (months)

12

New Contact

New Opportunity

New Case



Activated

Draft

✓ Mark Status as Complete

Related

Details



Contract History (3)

Date	Field	User	Original Value	New Value
12/9/2024, 11:20 PM	Contract Activated.	Melanie Olisah		
12/9/2024, 11:20 PM	Status	Melanie Olisah	Draft	Activated
12/9/2024, 11:20 PM	Created.	Melanie Olisah		

Activity



Filters: All time • All activities • All types



Refresh • Expand All • View All

✓ Upcoming & Overdue

Activate Windows
Go to Settings to activate Windows.