



Opportunity Management in Salesforce

Independent Project: Use Salesforce to Close Sales Deals

ENEJE GOODLUCK ANTHONY



Part A Overview

- 
- 1 **Task 1:** Update FoodStars.org Opportunity Record
 - 2 **Task 2:** Update Collection Consulting Group 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



PATHSTREAM

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

Opportunity FoodStars.Org-
Account Name FoodStars.Org Close Date 31/12/2024 Amount Opportunity Owner Goodluck Eneje

+ Follow Edit New Case New Note

Prospecting Qualification Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Quote Negotiation/Review Closed ✓ Mark Stage as Complete

Activity Details Chatter

Log a Call New Task New Event Email

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue
Research on the organization's size and budget
You have an upcoming task with Martha Newman 20 Nov 2023

November • 2024
Call
You logged a call This Month Today

To Do List

92°F Partly sunny

Search

Notes (2)
Follow up Result 11/11/2024, 09:12 by Goodluck Eneje From Sandro's last call with Martha, he has surmised that she is very interested in SimplySocial but that she works for a nonprofit so she might have some...
Call Outcome 31/10/2024, 17:21 by Goodluck Eneje Very interested, especially in our product's ability to integrate social media channels across different social media platforms. Does marketing at a nonprofit...
Activate Windows Go to Settings to activate Windows.

5:48 AM 11/11/2024

Part A, Task 1:

Update FoodStars.Org Opportunity Record



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

Opportunity FoodStars.Org

November - 2023 Last Year

Meeting You had an event with Martha Newman

No more past activities to load.

07:30 | 21 Nov 2023

Contact Roles (2)

- Martha Newman PRIMARY
Role: Social Media Marketing Manager
- Jessie Patel
Role: Decision Maker
Title: Digital Marketing Manager

Partners (0)

Stage History (1)

- Prospecting
Amount: \$0.00
Probability (%): 10%
Expected Revenue: Go to Settings to activate Windows.

To Do List

1 92°F Partly sunny

Search

5:56 AM 11/11/2024

This screenshot shows a Salesforce Lightning interface for an opportunity record. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, and More. The main content area displays the opportunity details for 'FoodStars.Org'. On the left, a sidebar shows activity history for November 2023, including a meeting with Martha Newman. The right side contains sections for Contact Roles (with two entries: Martha Newman and Jessie Patel), Partners (0), and Stage History (1). The Stage History section shows the opportunity is currently Prospecting with a 10% probability and no expected revenue. The bottom of the screen features a taskbar with various icons and system status information like the date and time.

Part A, Task 1:

Update FoodStars.Org Opportunity Record



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

Opportunity FoodStars.Org

Account Name FoodStars.Org Close Date 31/12/2024 Amount Opportunity Owner Goodluck Eneje

Prospecting Qualification Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Quote Negotiation/Review Closed Mark Stage as Complete

Activity Details Chatter

Log a Call New Task New Event Email

Upcoming & Overdue

Research on the organization's size and budget You have an upcoming task with Martha Newman 20 Nov 2023

November • 2024

Call You logged a call Today

To Do List

CHE - ARS Video highlight

Search

Activate Windows Go to Settings to activate Windows.

6:00 AM 11/11/2024

This screenshot shows a Salesforce Lightning interface for updating an opportunity record. The main header includes the PathStream logo and navigation links for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, and More. The specific opportunity record for 'FoodStars.Org' is displayed, showing details like Account Name, Close Date, Amount, and Opportunity Owner. A progress bar at the top indicates the stage of the sales process from Prospecting to Closed. The 'Activity' tab is selected, showing a timeline of recent actions including a call and an upcoming task. The 'Related' section lists three notes, one of which is a follow-up regarding license requirements. The bottom of the screen shows the Windows taskbar with various pinned icons and system status indicators.

Part A, Task 1:

Update FoodStars.Org Opportunity Record



P A T H S T R E A M

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

New Contact New Opportunity New Case

Event Meeting

Location Start End
25/11/2024, 10:00 25/11/2024, 11:00

Meeting Digest Details Related

Assigned To Goodluck Eneje

Subject Meeting

Name

Related To FoodStars.Org

Created By Goodluck Eneje, 11/11/2024, 15:04

Description

Last Modified By Goodluck Eneje, 11/11/2024, 15:04

To Do List

Upcoming Earnings Search

Activate Windows
Go to Settings to activate Windows.

6:05 AM 11/11/2024

Part A Task 1:

Update FoodStars.Org Opportunity Record



PATHSTREAM

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

Task
Confirm Budget with Jessie

Name Related To FoodStars.Org

Details Related

Assigned To Goodluck Eneje

Subject Confirm Budget with Jessie

Due Date 20/11/2024

Priority Normal

Created By Goodluck Eneje, 11/11/2024, 15:13

Status Not Started

Related To FoodStars.Org

Last Modified By Goodluck Eneje, 11/11/2024, 15:13

Activate Windows
Go to Settings to activate Windows.

javascript:void(0);

Part A, Task 1:

Update FoodStars.Org Opportunity Record



PATHSTREAM

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

Opportunity FoodStars.Org -

Account Name FoodStars.Org Close Date 31/12/2024 Amount ₦700.00 Opportunity Owner Goodluck Eneje

Stage changed successfully.

Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Quote Negotiation/Review Closed Mark Stage as Complete

Activity Details Chatter

Log a Call New Task New Event Email

Upcoming & Overdue

Confirm Budget with Jessie You have an upcoming task 20 Nov

Research on the organization's size and budget You have an upcoming task with Martha Newman 20 Nov 2023

View More

Filters: All time • All activities • All types Refresh • Expand All • View All

Related

Notes (3)

License Requirement for FoodStars.org 11/11/2024, 15:00 by Goodluck Eneje Martha Newman from FoodStars.org has informed us that the company would need two SimplySocial licenses for their account, allowing both her and Jessie to...

Follow up Result 11/11/2024, 09:12 by Goodluck Eneje From Sandro's last call with Martha, he has surmised that she is very interested in SimplySocial but that she works for a nonprofit so she might have some...

Call Outcome 31/10/2024, 17:21 by Goodluck Eneje Activate Windows Go to Settings to activate Windows.

92°F Partly sunny

Search

6:16 AM 11/11/2024

Part A, Task 2:

Update Yahoo Search Opportunity Record



Insert screenshots for each of these steps on the following slides to show the updates to the Collection Consulting Group opportunity record.

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

Step 1: Past activities showing the call logged with Lawrence

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



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

Name Related To Collection Consulting Group-

Details Related

Assigned To Goodluck Eneje
Subject Call
Due Date 11/11/2024
Priority Normal
Created By Goodluck Eneje, 11/11/2024, 15:26
Comments Follow up Call on Product and Services

Status Completed
Name
Related To Collection Consulting Group-

Last Modified By Goodluck Eneje, 11/11/2024, 15:26

To Do List

Activate Windows Go to Settings to activate Windows.

92°F Partly sunny

6:27 AM 11/11/2024

A screenshot of a Salesforce Lightning interface. The top navigation bar shows various tabs like Sales, Home, Opportunities, Leads, etc. The main content area is a 'Task' record for 'Collection Consulting Group-'. The 'Details' tab is selected, showing fields for Assigned To (Goodluck Eneje), Subject (Call), Due Date (11/11/2024), Priority (Normal), Created By (Goodluck Eneje, 11/11/2024, 15:26), and Comments (Follow up Call on Product and Services). The 'Status' field is set to 'Completed'. The 'Related To' field also points to 'Collection Consulting Group-'. At the bottom, there's a 'To Do List' section and a note to 'Activate Windows'.

Part A, Task 2:

Update Yaloo Search Opportunity Record



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

Opportunity Collection Consulting Group

Activity Details Chatter

Log a Call New Task New Event Email

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue

Need to send features and functionality description of our p... You have an upcoming task with Lawrence Ramirez

November • 2024

Call You logged a call

October • 2024

Call You logged a call with Lawrence Ramirez

Related

Notes (3)

Denise's Interest and Licensing Needs 11/11/2024, 15:32 by Goodluck Eneje Denise, Director of Marketing Operations at Yaloo Search, is very interested in SimplySocial's multi-user capabilities and integration features. Her team consist...

Follow up Result 11/11/2024, 09:15 by Goodluck Eneje Lawrence seems like a strong prospect and qualified lead, because she is interested in SimplySocial and works at a large company, so it's likely to be a bi...

Call Outcome 31/10/2024, 17:31 by Goodluck Eneje Director of marketing operations at a large company so it's likely that there are multiple stakeholders we'll need to appeal to. Follow up call set for Nov 22nd at...

View All Windows Go to Settings to activate Windows

javascript:void(0); 92°F Partly sunny 6:33 AM 11/11/2024

Search

Part A, Task 2:

Update Yaloo Search Opportunity Record



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

Opportunity **Collection Consulting Group-**
Account Name Collection Consulting Group Close Date 31/12/2024 Amount ₦10,000.00 Opportunity Owner Goodluck Eneje

Prospecting Qualification Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Quote Negotiation/Review Closed ✓ Mark Stage as Complete

Activity	Details	Chatter
Opportunity Owner	Goodluck Eneje	
Private		
Opportunity Name	Collection Consulting Group-	
Account Name	Collection Consulting Group	
Type		
Lead Source		
Amount	₦10,000.00	
Expected Revenue	₦1,000.00	
Close Date	31/12/2024	
Next Step		
Stage	Prospecting	
Probability (%)	10%	
Primary Campaign Source		

Related

Notes (3)

Denise's Interest and Licensing Needs
11/11/2024, 15:32 by Goodluck Eneje
Denise, Director of Marketing Operations at Yaloo Search, is very interested in SimplySocial's multi-user capabilities and integration features. Her team consist...

Follow up Result
11/11/2024, 09:15 by Goodluck Eneje
Lawrence seems like a strong prospect and qualified lead, because she is interested in SimplySocial and works at a large company, so it's likely to be a bi...

Call Outcome
31/10/2024, 17:31 by Goodluck Eneje
Director of marketing operations at a large company so it's likely that there are multiple stakeholders we'll need to appeal to. Follow up call set for Nov 22nd at...

To Do List

92°F Partly sunny

Search

6:37 AM 11/11/2024

Part A, Task 2:

Update Yaloo Search Opportunity Record



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

Opportunity Collection Consulting Group-

Contact Roles (3)

- Lawrence Ramirez PRIMARY
Role: Title: Digital Marketing Manager
- Wonhee Kim Influencer
Role: Title:
- Kenny Lopez Influencer
Role: Title: Influencer

Partners (0)

Stage History (2)

To Do List

Activate Windows

92°F Partly sunny

6:43 AM 11/11/2024

This screenshot shows a Salesforce Lightning interface for updating an opportunity record. The main page header includes a search bar and navigation links for Sales, Home, Opportunities, Leads, Tasks, etc. The specific opportunity record for 'Collection Consulting Group-' is open. On the right side, there are three panels: 'Contact Roles' listing three individuals (Lawrence Ramirez, Wonhee Kim, Kenny Lopez) with their roles and titles; 'Partners' which is currently empty; and 'Stage History' showing a single entry for 'Prospecting'. The bottom of the screen displays the Windows taskbar with various pinned icons and system status indicators like battery level and signal strength.

Part A, Task

2.

Update Yahoo Search Opportunity Record



The screenshot shows a Salesforce Lightning interface for an event titled "Amy to conduct a product demo with these three contacts on the opportunity record." The event details include a location (Location), start time (30/11/2019, 13:00), and end time (30/11/2019, 14:00). The event is categorized as an "All-Day Event". The "Details" tab is selected, displaying information such as Assigned To (Goodluck Eneje), Subject (Amy to conduct a product demo with these three contacts on the opportunity record.), Name (Collection Consulting Group), and Created By (Goodluck Eneje, 11/11/2024, 15:44). The "Related" tab is also visible. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, and More. A search bar and various icons are also present.

Part A, Task 2:

Update Yaloo Search Opportunity Record



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

Opportunity Collection Consulting Group-

Account Name Collection Consulting Group Close Date 31/12/2024 Amount ₦10,000.00 Opportunity Owner Goodluck Eneje

Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Quote Negotiation/Review Closed Mark Stage as Complete

Activity Details Chatter

Log a Call New Task New Event Email

Upcoming & Overview

Need to send features and functionality description of our p... You have an upcoming task with Lawrence Ramirez

November + 2024 This Month Today

To Do List

92°F Partly sunny

Search

6:47 AM 11/11/2024

Related

Notes (3)

Denise's Interest and Licensing Needs 11/11/2024, 15:32 by Goodluck Eneje Denise, Director of Marketing Operations at Yaloo Search, is very interested in SimplySocial's multi-user capabilities and integration features. Her team consist...

Follow up Result 11/11/2024, 09:15 by Goodluck Eneje Lawrence seems like a strong prospect and qualified lead, because she is interested in SimplySocial and works at a large company, so it's likely to be a bi...

Activate Windows Call Outcome 31/10/2024, 17:31 by Goodluck Eneje Go to Settings to activate Windows.

Part A, Task 3: Use Opportunity Kanban



P A T H S T R E A M

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 Collection Consulting Group opportunities are in as well as the estimated amounts attached to both.

Part A, Task 3: Use Opportunity Kanban



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

Opportunities All Opportunities

35 items • Sorted by Opportunity Name • Updated a few seconds ago

New Printable View

Prospecting (3)	Qualification (0)	Needs Analy... (2)	Value Propos... (3)	Id. Decision ... (3)	Perception A... (1)	Proposal/Pri... (2)	Negotiation/... (2)	Closed Won (19)
₦100,000 Farmers Coop. of Flo... Farmers Coop. of Florida 31/12/2024	₦685,000 Collection Consultin... ₦10,000.00 Collection Consulting Group 31/12/2024	₦330,700 Express Logistics Por... ₦80,000.00 Express Logistics and Trans... 16/09/2022	₦110,000 Edge Emergency Ge... ₦35,000.00 Edge Communications 16/09/2022	₦120,000 Express Logistics SLA ₦120,000.00 Express Logistics and Trans... 16/09/2022	₦370,000 United Oil Refinery ... ₦270,000.00 United Oil & Gas Corp. 16/09/2022	₦395,000 United Oil Installations ₦270,000.00 United Oil & Gas Corp. 16/09/2022	₦3,660,000 United Oil Refine... ₦915,000.00 United Oil & Gas Corp. 16/09/2022	
Pyramid Emergency ... ₦100,000.00 Pyramid Construction Inc. 16/09/2022	United Oil Plant Stan... ₦675,000.00 United Oil & Gas Corp. 16/09/2022	FoodStars.Org- ₦700.00 FoodStars.Org 31/12/2024	GenePoint Lab Gene... ₦60,000.00 GenePoint 16/09/2022	Grand Hotels Guest ... ₦250,000.00 Grand Hotels & Resorts Ltd 16/09/2022	Grand Hotels Kitche... ₦15,000.00 Grand Hotels & Resorts Ltd 16/09/2022	University of AZ Inst... ₦100,000.00 University of Arizona 16/09/2022	United Oil Office Por... ₦125,000.00 United Oil & Gas Corp. 16/09/2022	Grand Hotels Ge... ₦350,000.00 Grand Hotels & Resort... 16/09/2022
Yaloo Search- Yaloo Search 31/12/2024								United Oil Install... ₦270,000.00 United Oil & Gas Corp. 16/09/2022

Activate Windows Go to Settings to activate Windows

To Do List Copilot

88°F Partly sunny

5:58 AM 11/12/2024

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



Updating opportunity records, progressing opportunities through stages, and using the Opportunity Kanban in Salesforce enable SimplySocial's account executives (AEs) to manage their sales pipeline more efficiently. Opportunity records provide a centralized place to track client details, licensing needs, and budgets, while opportunity stages allow AEs to monitor and advance each deal through the sales process, from initial contact to closing. Using the Kanban view, AEs can visually organize opportunities by stage, drag them forward as they progress, and spot deals needing attention. By maintaining up-to-date records and stages, SimplySocial ensures smoother workflows, improves follow-ups, and optimizes forecasting, ultimately supporting more efficient, data-driven sales decisions.

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



P A T H S T R E A M

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



PATHSTREAM

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Products More

Product Single License Subscription

New Contact New Opportunity New Case

Product Code Small-Sized Company Offering Product Family None

Related Details

Product Name Single License Subscription Active

Product Code Small-Sized Company Offering

Created By Goodluck Eneje, 13/11/2024, 12:25 Last Modified By Goodluck Eneje, 13/11/2024, 12:25

Product Description 1 user, 5 social media profiles

Activate Windows Go to Settings to activate Windows.

javascript:void(0)

88°F Mostly sunny

Search

3:30 AM 11/13/2024

Part B, Task 1: Create Products



PATHSTREAM

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Products More

Relaunch to update :

Search...

New Contact New Opportunity New Case

Subscription Package

Product Code: Medium-Sized Company Offering Product Family: None

Details

Product Name: Subscription Package Active:

Product Code: Medium-Sized Company Offering Product Family: None

Created By: Goodluck Eneje, 13/11/2024, 12:27 Last Modified By: Goodluck Eneje, 13/11/2024, 12:27

Product Description: 4 users, 8 social media profiles

To Do List

Activate Windows
Go to Settings to activate Windows.

88°F Mostly sunny

3:31 AM 11/13/2024

Part B, Task 1: Create Products



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Products More

Product **Subscription Package Plus**

Product Code Large-Sized Company Offering Product Family None

Related Details

Product Name Subscription Package Plus Active

Product Code Large-Sized Company Offering Product Family None

Created By Goodluck Eneje, 13/11/2024, 12:28 Last Modified By Goodluck Eneje, 13/11/2024, 12:28

Product Description 8 users, 10 social media profiles

To Do List

Activate Windows Go to Settings to activate Windows.

88°F Mostly sunny Search

3:31 AM 11/13/2024

Part B, Task 1: Create Products



PATHSTREAM

Sales Home Opportunities Leads Tasks Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Products More

New Contact New Opportunity New Case

Product Extra User License

Product Code Large-Sized Company Offering Product Family None

Related Details

Product Name Extra User License Active

Product Code Large-Sized Company Offering Product Family None

Created By Goodluck Eneje, 13/11/2024, 12:29 Last Modified By Goodluck Eneje, 13/11/2024, 12:29

Product Description Additional user license that can be added to all Subscription offerings

To Do List

Activate Windows Go to Settings to activate Windows.

88°F Mostly sunny Search

3:31 AM 11/13/2024

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



P A T H S T R E A M

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Products More

Product Single License Subscription

New Contact New Opportunity New Case

Product Code: Small-Sized Company Offering Product Family: None

Related Details

Price Books (1)

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	₦50.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Add Standard Price

To Do List

Activate Windows
Go to Settings to activate Windows.

MIN - POR Game score

Search

3:48 AM 11/13/2024

Part B, Task 2: Create Standard Price Books



PATHSTREAM

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Products More

Product **Subscription Package**

New Contact New Opportunity New Case

Related Details

Price Books (1)

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	₦200.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Add to Price Book

View All

To Do List

Activate Windows
Go to Settings to activate Windows.

Finance headline
China Urges Lift... 3:48 AM 11/13/2024

Search

Part B, Task 2: Create Standard Price Books



Sales Home Opportunities Leads Tasks Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Products More

Search...

Product Subscription Package Plus

Product Code: Large-Sized Company Offering Product Family: None

New Contact New Opportunity New Case

Related Details

Price Books (1)

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	₦400.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Add to Price Book

View All

Activate Windows
Go to Settings to activate Windows.

javascript:void(0)

Finance headline China Urges Lifti... Search

3:48 AM 11/13/2024

Part B, Task 2: Create Standard Price Books



P A T H S T R E A M

playful-panda-ru8auc-dev-ed.trailblaze.lightning.force.com/lightning/r/Product2/01t...

Search... ...

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Products More ...

Product Extra User License

Product Code: Large-Sized Company Offering Product Family: None

New Contact New Opportunity New Case ...

Related Details

Price Books (1) Add to Price Book

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	₦35.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[View All](#)

To Do List

Activate Windows
Go to Settings to activate Windows.

Finance headline China Urges Lifti... ...

3:48 AM 11/13/2024

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

Step 2: The new price book for **enterprise customers** you just created

Step 3: The updated price book for enterprise customers with the associated products

Step 4: The updated price book for nonprofit customers with the associated products showing the new prices

Part B, Task 3: Create Custom Price Books



P A T H S T R E A M

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Price Books More

Relaunch to update

Price Book Nonprofit

Related Details

Price Book Name
Nonprofit

Description
Discounted rate for all subscription options for nonprofit and social good organizations

Created By
Goodluck Eneje, 13/11/2024, 12:59

Active

Is Standard Price Book

Last Modified By
Goodluck Eneje, 13/11/2024, 12:59

To Do List

Activate Windows
Go to Settings to activate Windows.

88°F Mostly sunny

Search

4:03 AM 11/13/2024

Part B, Task 3: Create Custom Price Books



P A T H S T R E A M

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Price Books More

Enterprise Customers

Related Details

Price Book Name: Enterprise Customers

Description: Standard rate for all subscription options for enterprise and standard business customers

Created By: Goodluck Eneje, 13/11/2024, 13:00

Active:

Is Standard Price Book:

Last Modified By: Goodluck Eneje, 13/11/2024, 13:00

Activate Windows
Go to Settings to activate Windows.

To Do List



Search



4:04 AM
11/13/2024

Part B, Task 3: Create Custom Price Books



P A T H S T R E A M

Sales Home Opportunities Leads Tasks Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Price Books More

Enterprise Customers

Related Details

Price Book Entries (4)

Product Name	Product Code	List Price	Active
Extra User License	Large-Sized Company Offering	₦35.00	<input checked="" type="checkbox"/>
Single License Subscription	Small-Sized Company Offering	₦50.00	<input checked="" type="checkbox"/>
Subscription Package	Medium-Sized Company Offering	₦200.00	<input checked="" type="checkbox"/>
Subscription Package Plus	Large-Sized Company Offering	₦400.00	<input checked="" type="checkbox"/>

Add Products

View All

Price Book History (1)

Date	Field	User	Original Value	New Value
13/11/2024, 13:00	Created.	Goodluck Eneje		

View All

Activate Windows
Go to Settings to activate Windows.

javascript:void(0)

88°F Mostly sunny

Search

4:05 AM 11/13/2024

Part B, Task 3: Create Custom Price Books



P A T H S T R E A M

Sales Home Opportunities Leads Tasks Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Price Books More

Search... Relaunch to update

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](#)

Price Book History (1)

Date	Field	User	Original Value	New Value
13/11/2024, 12:59	Created.	Goodluck Eneje		

[View All](#)

Activate Windows
Go to Settings to activate Windows.

To Do List

88°F
Mostly sunny

Search



4:06 AM
11/13/2024

Part B, Task 4:

Associate Price Books With Opportunities



P A T H S T R E A M

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: Collection Consulting Group opportunity record showing
products/prices

Part B, Task 4:

Associate Price Books With Opportunities



P A T H S T R E A M

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Price Books More

Opportunities > FoodStars.Org-Products (Nonprofit)

4 items • Sorted by Sort Order • Updated a few seconds ago

Product	Quantity	Sales Price	Date	Line Description
1 Extra User License	9.00	₦28.00		Additional user license that can be added to all Subscription offerings
2 Single License Subscription	1.00	₦40.00		1 user, 5 social media profiles
3 Subscription Package	4.00	₦160.00		4 users, 8 social media profiles
4 Subscription Package Plus	8.00	₦320.00		8 users, 10 social media profiles

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To Do List

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Search

4:40 AM 11/13/2024

Part B, Task 4:

Associate Price Books With Opportunities



P A T H S T R E A M

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Price Books More

Opportunities > Collection Consulting Group-
Products (Enterprise Customers)

4 items • Sorted by Sort Order • Updated a few seconds ago

Product	Quantity	Sales Price	Date	Line Description
1 Extra User License	9.00	₦35.00		Additional user license that can be added to all Su...
2 Single License Subscription	1.00	₦50.00		1 user, 5 social media profiles
3 Subscription Package	4.00	₦200.00		4 users, 8 social media profiles
4 Subscription Package Plus	8.00	₦400.00		8 users, 10 social media profiles

Activate Windows
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To Do List

NBA MIN - POR
Game score



Search



4:45 AM
11/13/2024

Part B, Task 5: Create Quotes



On the following slide, insert a screenshot of the Initial Quote record page for the Collection Consulting Group 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



P A T H S T R E A M

Sales Home Opportunities Leads Tasks Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Quotes More

Initial Quote

Quote Number: 00000002 Expiration Date: 27/11/2020 Syncing: ✓ Opportunity Name: Collection Consulting Group Account Name: Collection Consulting Group Grand Total: ₦4,415.00

Draft → Needs Review → In Review → Approved → Rejected → Presented → Accepted → Denied

Mark Status as Complete

Related Details

Quote Line Items (4)

Product	Sales Price	Quantity	Subtotal
Extra User License	₦35.00	9.00	₦315.00
Single License Subscription	₦50.00	1.00	₦50.00
Subscription Package	₦200.00	4.00	₦800.00
Subscription Package Plus	₦400.00	8.00	₦3,200.00

Add Products Edit Products

View All

Quote PDFs (0)

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Activate Windows

Go to Settings to activate Windows.

To Do List

89°F Mostly sunny

Search

5:10 AM 11/13/2024

Part B, Task 6: Send Quotes



P A T H S T R E A M

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 Lawrence.

Part B, Task 6: Send Quotes



P A T H S T R E A M

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Quote PDFs (0)

To Do List

MIN - POR Game score

Search

5:15 AM
11/13/2024

Activate Windows
Go to Settings to activate Windows.

PDF Preview

quoteTemplateDataViewer.apexp

1 / 1 | 75% +

Data tech

Company Address NG

Created Date 13/11/2024

Expiration Date 27/11/2020

Quote Number 00000002

Prepared By Goodluck Eneje

Email anthonygoodluck041@gmail.com

Contact Name Lawrence Ramirez

Bill To 19461 Greenview Ave.
New York 10174
USA

Product	List Price	Sales Price	Quantity	Total Price
Extra User License	₦35.00	₦35.00	9.00	₦315.00
Single License Subscription	₦50.00	₦50.00	1.00	₦50.00
Subscription Package	₦200.00	₦200.00	4.00	₦800.00
Subscription Package Plus	₦400.00	₦400.00	8.00	₦3,200.00

Save and Email Quote Save to Quote Cancel

Copy Cour Proj Copy Hand Copy Hand Rece Goo Copy Imp Dow Relaunch to update

The screenshot shows a Salesforce Lightning interface displaying a quote template. The page title is 'quoteTemplateDataViewer.apexp'. The quote details include: Company Address: NG; Created Date: 13/11/2024; Expiration Date: 27/11/2020; Quote Number: 00000002. Prepared By: Goodluck Eneje (anthonygoodluck041@gmail.com). Contact Name: Lawrence Ramirez. Bill To: 19461 Greenview Ave., New York 10174, USA. The quote table lists products and their prices:

Product	List Price	Sales Price	Quantity	Total Price
Extra User License	₦35.00	₦35.00	9.00	₦315.00
Single License Subscription	₦50.00	₦50.00	1.00	₦50.00
Subscription Package	₦200.00	₦200.00	4.00	₦800.00
Subscription Package Plus	₦400.00	₦400.00	8.00	₦3,200.00

Buttons at the bottom right include 'Save and Email Quote', 'Save to Quote', and 'Cancel'. A 'PDF Preview' button is visible at the top right of the main content area. The browser address bar shows the URL: playful-panda-ru8auc-dev-ed.trailblaze.lightning.force.com/lightning/r/Quote/0Q0Qy... . The system navigation bar at the bottom includes icons for Home, Search, and various applications like Microsoft Word, Excel, and Powerpoint.

Part B, Task 6: Send Quotes



P A T H S T R E A M

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Quotes More More

Relaunch to update :

Quote for SimplySocial Solutions

Message Details

From: Goodluck Eneje
To: lawrence@collectionconsulting.com Bcc: anthonygoodluck041@gmail.com

14:18 | Today

Hi Lawrence,

Thank you for your interest in SimplySocial's products! Attached is the quote for the social media management solution we discussed, tailored to fit the needs of your team.

This quote includes licensing for 10 users, allowing your team to manage multiple accounts seamlessly. If you have any questions or would like to review any specifics, please don't hesitate to reach out. I'm here to help ensure the setup meets your goals.

Looking forward to hearing your thoughts!

Best regards,
Amy
Sales Operations Specialist
SimplySocial

Powered by Salesforce
<http://www.salesforce.com/>

Related

Attachments (1)

Initial Quote_V1
PDF 13 Nov 2024 • 77KB • pdf

View All

Sender and Recipients (1)

Goodluck Eneje User

Type:

View All

Other Related People (0)

Related To (1)

Activate Windows
Go to Settings to activate Windows.

To Do List

Current temp Near record

Search

5:19 AM 11/13/2024

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 Collection Consulting Group 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



playful-panda-ru8auc-dev-ed.trailblaze.lightning.force.com/lightning/r/Opportunity/...

Opportunity Collection Consulting Group-

Account Name Collection Consulting Group Close Date 13/11/2024 Amount \$4,365.00 Opportunity Owner Goodluck Eneje

Stage changed successfully.

Activity Details Chatter

Log a Call New Task New Event Email

Upcoming & Overdue

Need to send features and functionality description of our p... You have an upcoming task with Lawrence Ramirez

November • 2024

Call You logged a call

Filters: All time • All activities • All types Refresh • Expand All • View All

Related Notes (3)

Denise's interest and Licensing Needs 11/11/2024, 15:32 by Goodluck Eneje Denise, Director of Marketing Operations at Yaloo Search, is very interested in SimplySocial's multi-user capabilities and integration features. Her team consist...

Follow up Result 11/11/2024, 09:15 by Goodluck Eneje Lawrence seems like a strong prospect and qualified lead, because she is interested in SimplySocial and works at a large company, so it's likely to be a bi...

Call Outcome 31/10/2024, 17:31 by Goodluck Eneje Activate Windows Go to Settings to activate Windows.

89°F Partly sunny

Search

5:27 AM 11/13/2024

Part B, Task 7: Close the Deal



A screenshot of a Salesforce Lightning interface for an Opportunity record. The URL in the browser bar is playful-panda-ru8auc-dev-ed.lightning.force.com/lightning/r/Opportunity/000000000000000. A green success message at the top right says "Your note was created." The Opportunity record for "FoodStars.Org" shows the following details:

- Account Name: FoodStars.Org
- Close Date: 31/12/2024
- Amount: ₦3,492.00
- Opportunity Owner: Goodluck Eneje

The status of the opportunity is "Closed Lost". The interface includes sections for Activity (with buttons for Log a Call, New Task, New Event, and Email), Chatter, and Related Notes. A sidebar on the left shows upcoming tasks and events. The bottom of the screen displays the Windows taskbar with various pinned icons and the system tray showing the date and time.

Part B, Task 8: Create Contracts



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

Part B, Task 8: Create Contracts



P A T H S T R E A M

Sales Home Opportunities Leads Tasks Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar Contracts More

Contract **00000101**

Account Name Collection Consulting Group Status Draft Contract Start Date 14/11/2019 Contract End Date 13/11/2020 Contract Term (months) 12

New Contact New Opportunity New Case

Draft Mark Status as Complete

Related Details

Contract Owner Goodluck Eneje	Status Draft
Contract Number 00000101	Contract Start Date 14/11/2019
Account Name <u>Collection Consulting Group</u>	Contract End Date 13/11/2020
Customer Signed By <u>Lawrence Ramirez</u>	Contract Term (months) 12
Customer Signed Title Mr	Owner Expiration Notice 30 Days
Customer Signed Date 13/11/2019	Company Signed By Goodluck Eneje
Price Book	Company Signed Date 13/11/2019

Activity

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Activate Windows
Go to Settings to activate Windows.

javascript:void(0)

89°F Partly sunny

Search

5:37 AM 11/13/2024