



Lead Management in Salesforce

Project: Use Salesforce to Identify Sales Prospects

ENEJE GOODLUCK ANTHONY



Part A Overview

- 
- 1 **Task 1: Structure and Download Lead Data**
 - 2 **Task 2: Import Data in Salesforce**
 - 3 **Task 3: Create a List View and Filter for Leads**
 - 4 **Task 4: Associate Leads With a Campaign**
 - 5 **Task 5: Business Case Analysis**



Part A, Task 1: Structure and Download

Lead Data

After you've finished cleaning up the data and fixing all the errors in the spreadsheet data, insert a screenshot of all the lead data in your spreadsheet. Make sure you can see all the columns, including:

- First Name
- Last Name
- Title
- Company
- Phone Number
- Email

Replace the text box on the following slide with your screenshot



P A T H S T R E A M

Part A, Task 1: Screenshot

Screenshot of a Google Sheets document titled "Copy of Independent Project, Part A: Inbound Leads". The document contains a table with 11 rows of data, each representing an individual's contact information.

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Title	Company	Phone Number	Email			
2	Thandiwe	Bandi	Social Media Marketer	Jazz Mystics Music Group	(441) 709-5905	tbandi@jazzmystics.com			
3	Denise	Choi	Director of Marketing Operations	Yaloo Search	(824) 617-6033	dchoi@yaloooyos.com			
4	Chidi	Seydou	Social Media Intern	Attitude Talent Agency	(851) 923-3824	chidiseydou415@attitude.com			
5	Manisha	Visvanathan	Senior Growth Marketing Manager	Growlers and Stuff Craft Brewery	(326) 598-4003	manishavavis@growlers.com			
6	Janet	Steinberg	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com			
7	Lawrence	Ramirez	Digital Marketing Manager	Collection Consulting Group	(346) 269-7771	lawrence@collectionconsulting.com			
8	Martha	Newman	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org			
9	Kiran	Stefcia	Director of Marketing	Kiran and Co Marketers	(347) 810-3329	kiranstefcia@marketersco.com			
10	Jay	Farley	Content Marketing Manager	Random Wishes Builders	(735) 716-5095	jayfarley1985@wishes.com			
11	Danika	Marcia	Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	danika@tedstoys.com			
12									
13									
14									
15									
16									
17									
18									
19									

The screenshot also shows a Windows taskbar at the bottom with various icons and a weather widget indicating "86°F Heavy rain".



P A T H S T R E A M

Part A, Task 2: Import Data in Salesforce

Navigate to the App launcher and open the Sales app to the Leads tab. Organize the lead list so that the most recently created leads appear first. Then, insert a screenshot to show all 10 of the leads that you've just uploaded on the following slide.



P A T H S T R E A M

Part A, Task 2: Screenshot

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

Leads Inbound leads

31 items • Sorted by Name • Filtered by All leads • Updated a few seconds ago

	Name ↑	Title	Company	Email	Lead Status	State/Pr...	Created Date
1	Andy Young	SVP, Operations	Dickenson plc	a_young@dickenson.com	Closed - Converted	KS	07/10/2024, 09:58
2	Betty Bair	VP, Administration	American Banking Corp.	bblair@abankingco.com	Closed - Not Converted	PA	07/10/2024, 09:58
3	Bill Dadio Jr	CFO	Zenith Industrial Partners	bill_dadio@zenith.com	Closed - Not Converted	OH	07/10/2024, 09:58
4	Brenda McClure	CFO	Cardinal Inc.	brenda@cardinal.net	Working - Contacted	IL	07/10/2024, 09:58
5	Carolyn Crenshaw	VP, Technology	Ace Iron and Steel Inc.	carolync@aceis.com	Closed - Not Converted	AL	07/10/2024, 09:58
6	Chidi Seydou	Social Media Intern	Attitude Talent Agency	chidiseydou415@attitude.com	Open - Not Contacted		28/10/2024, 12:37
7	Danika Marcia	Junior Marketing ...	Ted's Toy Shop	danika@tedstoys.com	Open - Not Contacted		28/10/2024, 12:37
8	David Monaco	CFO	Blues Entertainment Corp.	david@blues.com	Working - Contacted		07/10/2024, 09:58
9	Denise Choi	Director of Marke...	Yaloo Search	dchoi@yaloooyos.com	Open - Not Contacted		28/10/2024, 12:37
10	Eugena Luce	CEO	Pacific Retail Group	eluce@pacificretail.com	Closed - Not Converted	MA	07/10/2024, 09:58
11	Jack Rogers	VP, Facilities	Burlington Textiles Corp of America	jrogers@btcac.com	Closed - Converted	NC	07/10/2024, 09:58
12	Janet Steinberg	Social Media Mar...	Costumez Warehouse	janet.steinberg@costumez.com	Open - Not Contacted		28/10/2024, 12:37
13	Jay Farley	Content Marketin...	Random Wishes Builders	jayfarley1985@wishes.com	Open - Not Contacted		28/10/2024, 12:37
14	Jeff Glimpse	SVP, Procurement	Jackson Controls	jeffg@jackson.com	Open - Not Contacted		07/10/2024, 09:58
15	Kathy Snyder	Regional General ...	TNR Corp.	ksynder@tnr.net	Working - Contacted	CT	07/10/2024, 09:58
16	Kiran Stefcia	Director of Marke...	Kiran and Co Marketers	kiranstefcia@marketersco.com	Open - Not Contacted		28/10/2024, 12:37

To Do List

Nasdaq 100 -1.65% 7:26 AM 10/31/2024

Activate Windows Go to settings to activate Windows.

Part A, Task 3: Create a List View and Filter for Leads

Insert screenshots of the Demo leads list view for each of the steps below in the following slides. Your screenshots should show that you've:

Step 1: Created a clone of the leads view titled “Demo Leads”

Step 2: Added a filter to only be able to see leads that are open and haven't been contacted

Step 3: Made sure all noted fields are visible and in the right order

Step 4: Created a separate tab for the leads.



P A T H S T R E A M

Part A, Task 3: Step 1 screenshot

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

Leads Inbound leads

10 items • Sorted by Name • Filtered by All leads - Created Date, Lead Status • Updated a few seconds ago

	Name ↑	Company	State/Pr... ↓	Email	Lead Status	Created Date	Owner Alias	Unread B... ↓
1	Chidi Seydou	Attitude Talent Agency		chidiseydou415@attitude.com	Open - Not Contacted	28/10/2024, 12:37	GEnej	<input checked="" type="checkbox"/>
2	Danika Marcia	Ted's Toy Shop		daniika@tedstoys.com	Open - Not Contacted	28/10/2024, 12:37	GEnej	<input checked="" type="checkbox"/>
3	Denise Choi	Yaloo Search		dchoi@yaloooyos.com	Open - Not Contacted	28/10/2024, 12:37	GEnej	<input checked="" type="checkbox"/>
4	Janet Steinberg	Costumez Warehouse		janet.steinberg@costumez.com	Open - Not Contacted	28/10/2024, 12:37	GEnej	<input checked="" type="checkbox"/>
5	Jay Farley	Random Wishes Builders		jayfarley1985@wishes.com	Open - Not Contacted	28/10/2024, 12:37	GEnej	<input checked="" type="checkbox"/>
6	Kiran Stefcia	Kiran and Co Marketers		kiranstefcia@marketersco.com	Open - Not Contacted	28/10/2024, 12:37	GEnej	<input checked="" type="checkbox"/>
7	Lawrence Ramirez	Collection Consulting Group		lawrence@collectionconsulting.com	Open - Not Contacted	28/10/2024, 12:37	GEnej	<input checked="" type="checkbox"/>
8	Manisha Visvanathan	Growlers and Stuff Craft Brewery		manishavis@growlers.com	Open - Not Contacted	28/10/2024, 12:37	GEnej	<input checked="" type="checkbox"/>
9	Martha Newman	FoodStars.Org		martha.newman@foodstars.org	Open - Not Contacted	28/10/2024, 12:37	GEnej	<input checked="" type="checkbox"/>
10	Thandiwe Bandi	Jazz Mystics Music Group		tbandi@jazzmystics.com	Open - Not Contacted	28/10/2024, 12:37	GEnej	<input checked="" type="checkbox"/>

To Do List

Activate Windows
Go to Settings to activate Windows

Current temp Near record

Search

5:13 AM 10/28/2024

PRE



P A T H S T R E A M

Part A, Task 4: Associate Your Leads with a Campaign

After you've associated all 10 leads with the new campaign, navigate to the Campaigns tab of your Sales app. Take a screenshot of the Campaign Members page of the Social Media Conference Email that shows all the leads you've just associated with this campaign, and insert it on the next slide.



P A T H S T R E A M

Part A, Task 4: Screenshot

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

Campaigns > Social Media Conference Email Campaign
Campaign Members

12 items • Sorted by Last Modified Date • Updated a few seconds ago

	Type	Status	Name	Title	First Name	Last Name	Company
1	Lead	Responded	Bertha Boxer	Director of Vendor Relations	Bertha	Boxer	Farmers Coop. of Florida
2	Lead	Responded	Betty Bair	VP, Administration	Betty	Bair	American Banking Corp.
3	Lead	Responded	Brenda Mcclure	CFO	Brenda	Mcclure	Cadinal Inc.
4	Lead	Responded	David Monaco	CFO	David	Monaco	Blues Entertainment Corp.
5	Lead	Responded	Kathy Snyder	Regional General Manager	Kathy	Snyder	TNR Corp.
6	Lead	Responded	Kristen Akin	Director, Warehouse Mgmt	Kristen	Akin	Aethna Home Products
7	Lead	Responded	Norm May	VP, Facilities	Norm	May	Greenwich Media
8	Lead	Responded	Patricia Feager	CEO	Patricia	Feager	International Shipping Co.
9	Lead	Responded	Sandra Eberhard	VP, Production	Sandra	Eberhard	Highland Manufacturing Ltd.
10	Lead	Responded	Shelly Brownell	SVP, Technology	Shelly	Brownell	Western Telecommunications Corp.
11	Lead	Responded	Violet Macleod	VP, Finance	Violet	Macleod	Emerson Transport
12	Lead	Responded	Tom James	SVP, Production	Tom	James	Delphi Chemicals

To Do List

Activate Windows
Go to Settings to activate Windows

Sports headline
Flyers' Kolosov fi...

6:26 AM 10/28/2024

Part A, Task 5: Business Case Analysis



In a short paragraph on the following slide, describe how importing and organizing data in Salesforce would help the sales and marketing teams SimplySocial. In your description, include:

- The overall purpose of importing and organizing data.
- The major steps you took to import and organize data.
- How the sales and marketing teams at SimplySocial would benefit from imported and organized lead data in Salesforce.



Part A, Task 5: Written response

Importing and organizing lead data in Salesforce at SimplySocial is crucial for streamlining sales and marketing efforts. The primary purpose of this process is to centralize lead information, ensuring that it's accurate, accessible, and segmented for targeted campaigns and follow ups. Key steps involved include preparing and cleaning the lead data to remove duplicates and standardize fields, mapping fields in Salesforce to match the imported data, and utilizing Salesforce's import tools to upload and organize data efficiently. By having a well-structured lead database, the sales team can prioritize high-quality leads and track engagement, while the marketing team can segment audiences and personalize outreach efforts, ultimately improving conversion rates and customer engagement.

Part B Overview

- 
- 1 **Task 1: Filter Leads to Decide Who to Approach**
 - 2 **Task 2: Initiate Contact With Leads via Email**
 - 3 **Task 3: Continue Contact With Leads via Calls**
 - 4 **Task 4: Mark Leads as Hot**
 - 5 **Task 5: Create Email Templates**
 - 6 **Task 6: Convert Leads**



P A T H S T R E A M

Part B Task 1: Filter Leads

After creating the necessary filter for the Demo Leads list, insert a screenshot showing the list with the leads filtered by manager. Make sure to adjust the size of the Title column so that all the leads' titles can be read.



Part B Task 1: Screenshot

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

Leads Inbound leads

6 items • Sorted by Created Date • Filtered by All leads - Title • Updated a few seconds ago

#	Name	Title	Company	Email	Lead Status	Created Date	State/Pr...
1	Manisha Visvanathan	Senior Growth Marketing Manager	Growlers and Stuff Craft Brewery	manishavis@growlers.com	Open - Not Contacted	28/10/2024, 12:37	
2	Janet Steinberg	Social Media Marketing Manager	Costumez Warehouse	janet.steinberg@costumez.com	Open - Not Contacted	28/10/2024, 12:37	
3	Lawrence Ramirez	Digital Marketing Manager	Collection Consulting Group	lawrence@collectionconsulting.com	Open - Not Contacted	28/10/2024, 12:37	
4	Martha Newman	Social Media Marketing Manager	FoodStars.Org	martha.newman@foodstars.org	Open - Not Contacted	28/10/2024, 12:37	
5	Jay Farley	Content Marketing Manager	Random Wishes Builders	jayfarley1985@wishes.com	Open - Not Contacted	28/10/2024, 12:37	
6	Kathy Snyder	Regional General Manager	TNR Corp.	ksynder@tnr.net	Working - Contacted	07/10/2024, 09:58	CT

Activate Windows
Go to Settings to activate Windows.

To Do List

Sports headline NFL: Controversy... Search

7:56 AM 10/31/2024



Part B Task 2: Initiate Contact with Leads via Email

Insert screenshots to show that you've emailed Janet, Lawrence, Martha, and Denise. Your screenshots should display the past activities log for each of these leads showing that you have sent them an email. The past activities log is at the bottom of the Activity tab.

Step 1: Past activity for Janet Steinberg showing you've emailed them.

Step 2: Past activity for Kathy Snyder showing you've emailed them.

Step 3: Past activity for Martha Newman showing you've emailed them.

Step 4: Past activity for Lawrence Ramirez showing you've emailed them.

Part B Task 2: Step 1 screenshot



The screenshot shows a Salesforce Lightning interface for a Lead record. The URL in the browser is playful-panda-ru8auc-dev-ed.lightning.force.com/lightning/r/Lead/00QQu0000DSdK7MAL. The page displays the Lead details for Janet Steinberg, including her name, phone number, and email. The lead status is "Open - Not Contacted". The interface includes sections for Activity (Log a Call, New Task, New Event, Email), Related (Notes, Campaign History), and a To Do List. The bottom of the screen shows the Windows taskbar with various pinned apps and system icons.



P A T H S T R E A M

Part B Task 2: Step 2 screenshot

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

Lead Ms Kathy Snyder

Title Regional General Manager Company TNR Corp. Phone (2) (860) 273-0123 Email ksynder@tnr.net

Working - Contacted Closed - Not Converted Converted

Activity Details Chatter

Log a Call New Task New Event Email

Upcoming & Overdue

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

October - 2024

SimplySocial's Social Media Management Tools for TNR CORP
You sent an email to [Kathy Snyder](#)

This Month

Unopened 16:53 | Today

To Do List

USD/GBP +0.74%

Search

Activate Windows

Social Media Conference Email Campaign Start Date: 24/07/2019 Settings to activate Windows.

8:53 AM 10/31/2024 PRE

Related

We found no potential duplicates of this Lead.

No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Notes (0)

Campaign History (2)

Part B Task 2: Step 3 screenshot



The screenshot shows a Salesforce Lightning interface for a Lead record. The URL in the browser is playful-panda-ru8auc-dev-ed.lightning.force.com/lightning/r/Lead/00QQy00000DSdK9MAL/vi.... The main header includes a navigation bar with Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, and More.

The Lead record for **Martha Newman** is displayed, with the status message **Email was sent.** A progress bar at the bottom indicates the lead's status: Open - Not Contacted, Working - Contacted, Closed - Not Converted, and Converted. A button to **Mark Status as Complete** is also present.

The Activity section shows buttons for Log a Call, New Task, New Event, and Email. It displays an **Upcoming & Overdue** section with a note: "No activities to show. Get started by sending an email, scheduling a task, and more." Below this is an **October • 2024** section with a link to "Discover How SimplySocial Can Support Your Social Media Goals".

The Details section shows Title: Social Media Marketing Manager, Company: FoodStars.Org, Phone: (2) [dropdown], and Email: martha.newman@foodstars.org.

The Chatter section shows a single Unopened email from **Martha Newman** with the subject "Discover How SimplySocial Can Support Your Social Media Goals". The email was sent at 16:41 | Today.

The Related section shows a note: "We found no potential duplicates of this Lead." and links to Notes (0) and Campaign History (0). A watermark for "Activate Windows" is visible in the bottom right corner.

The bottom navigation bar includes icons for Weather (89°F, Mostly sunny), Search, and various system tools. The system status bar shows the date (10/31/2024), time (8:41 AM), battery level, and signal strength.

Part B Task 2: Step 4 screenshot



The screenshot shows a Salesforce Lightning interface for a Lead record. The URL in the browser is playful-panda-ru8auc-dev-ed.lightning.force.com/lightning/r/Lead/00QQu0000DSdK8MAL/vi.... The page title is "Lawrence Ramirez".

The top navigation bar includes links for WhatsApp, Courses, Projects, Hands, Copy, Leads, Copy, demo, Google, Import, Login, and Down. The main menu dropdown for Leads is open, showing options like Home, Opportunities, Leads, Tasks, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, and More.

The Lead record for "Lawrence Ramirez" is displayed, with a status bar at the bottom showing "DOW -0.82%".

The main content area shows activity history for Lawrence Ramirez:

- Activity: Log a Call, New Task, New Event, Email.
- Filters: All time • All activities • All types.
- Upcoming & Overdue: No activities to show. Get started by sending an email, scheduling a task, and more.
- October 2024: You sent an email to Lawrence Ramirez.
- This Month: Unopened emails.

The Related section indicates "We found no potential duplicates of this Lead." and lists Notes (0) and Campaign History (0).

A watermark for "Activate Windows Go to Settings to activate Windows" is visible in the bottom right corner.



P A T H S T R E A M

Part B Task 3: Continue Contact with Leads via Calls

Insert screenshots for the calls with the four leads. Make sure your screenshots display the past activity logs for each of these leads showing that calls, notes, tasks, and/or emails have been logged with each of them. The past activities log is at the bottom of the Activity tab.

Step 1: Past activity for Janet Steinberg showing logged activities.

Step 2: Past activity for Kathy Snyder showing logged activities.

Step 3: Past activity for Martha Newman showing logged activities.

Step 4: Past activity for Lawrence Ramirez showing logged activities.



P A T H S T R E A M

Part B Task 3: Step 1 screenshot

The screenshot shows a Salesforce Lightning interface for a Lead record. The URL in the browser is playful-panda-ru8auc-dev-ed.lightning.force.com/lightning/r/Lead/00QQy00000DSdK7MAL/vi.... The page title is "Janet Steinberg".

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.

The main content area displays the Lead record for Janet Steinberg. The status bar at the bottom indicates "Working - Contacted" and "Closed - Not Converted". There is a button to "Mark Status as Complete".

The "Activity" section shows:

- Buttons for Log a Call, New Task, New Event, and Email.
- A dropdown menu for filters: All time, All activities, All types, Refresh, Expand All, View All.
- A list of activity items:
 - Upcoming & Overdue:** Follow Up (You have an upcoming task, due 12 Nov 2023).
 - October - 2024:** Introduction to SimplySocial's Solutions for Enhanced Social Me... (Unopened, sent to Janet Steinberg, 16:36 | Today).
 - November - 2023:** Follow Up (You had an event, 15:00 | 12 Nov 2023).

The "Related" section includes:

- We found no potential duplicates of this Lead.** (No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.)
- Notes (1):** Call Follow Up (31/10/2024, 17:11 by Goodluck Eneje). Description: Has a social media marketing tool that she is satisfied with but has some definite needs that SimplySocial's tool can solve that hers can't. Meeting set for Nov 12th...
- Campaign History (0):** Go to Settings to activate Windows.

The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray indicating the date and time as 9:15 AM, 10/31/2024.



P A T H S T R E A M

Part B Task 3: Step 2 screenshot

The screenshot shows a Salesforce Lightning interface for a lead record. The URL in the browser is playful-panda-ru8auc-dev-ed.trailblaze.lightning.force.com/lightning/r/Lead/00QQy0000CPXoOMAX/v. The lead record for "Ms Kathy Snyder" is displayed, with status "Working - Contacted". The activity timeline shows a call log from 11 Nov 2023, a call from October 2024, and an unopened email from SimplySocial's Social Media Management Tools for TNR CORP. The related section indicates no potential duplicates and shows one note from a call outcome on 31/10/2024.

Activity

Details Chatter

Log a Call New Task New Event Email

Upcoming & Overdue

Call Follow Up You have an upcoming task 11 Nov 2023

October • 2024

Call You logged a call This Month

Email Unopened 16:53 | Today

To Do List

Nasdaq 100 -2.20%

Search

Related

We found no potential duplicates of this Lead.

No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Notes (1)

Call Outcome 31/10/2024, 17:04 by Goodluck Eneje Did not answer phone.

Campaign History (2) Activate Windows Go to Settings to activate Windows.

9:06 AM 10/31/2024



P A T H S T R E A M

Part B Task 3: Step 3 screenshot

The screenshot shows a Salesforce Lightning interface for a Lead record. The URL in the browser is playful-panda-ru8auc-dev-ed.lightning.force.com/lightning/r/Lead/00QQy00000DSdK9MAL/vi.... The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, More, and a sidebar with Follow, Convert, Edit, New Case, and Mark Status as Complete.

The Lead record for **Martha Newman** is displayed. The status is set to **Closed - Not Converted**. The activity section shows an upcoming task: "Research on the organization's size and budget" due on **20 Nov 2023**. The activity timeline includes calls in October and emails in November. The related section indicates no potential duplicates were found.

The bottom of the screen shows a Windows taskbar with icons for File Explorer, Search, Control Panel, Task View, File History, File Explorer, Microsoft Edge, Microsoft Teams, and a PathStream icon. The system tray shows the date as 10/31/2024 and the time as 9:26 AM.



P A T H S T R E A M

Part B Task 3: Step 4 screenshot

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

Lead Lawrence Ramirez

Working - Contacted Closed - Not Converted Converted

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

October - 2024

Call You logged a call

Email Introduction to SimplySocial's Platform for Streamlined Social M... You sent an email to Lawrence Ramirez

Bounced 16:46 | Today Last Year

Related

We found no potential duplicates of this Lead.

No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Notes (1)

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

Campaign History (0) Go to Settings to activate Windows.

VIX +11.11%

Search

9:35 AM 10/31/2024



P A T H S T R E A M

Part B Task 4: Mark Leads as Hot

Screenshot showing the leads marked as hot and warm on the leads list. Make sure that “Rating” is a displayed field on the leads list and that you have organized the list so that hot and warm leads appear first. The leads that appear marked as hot and warm may include leads that pre-existed in Salesforce before you imported your leads.



P A T H S T R E A M

Part B Task 4: Screenshot

playful-panda-ru8auc-dev-ed.lightning.force.com/lightning/o/Lead/list?filterName=Inbound%20leads

Leads
Inbound leads

6 items • Sorted by Rating • Filtered by All leads - Title • Updated a few seconds ago

#	Name	Title	Company	Email	Rating	Lead Status	Created Date
1	Kathy Snyder	Regional General Manager	TNR Corp.	ksynder@tnr.net	Warm	Working - Contacted	07/10/2024, 09:58
2	Janet Steinberg	Social Media Marketing Manager	Costumez Warehouse	janet.steinberg@costumez.com	Warm	Working - Contacted	28/10/2024, 12:37
3	Lawrence Ramirez	Digital Marketing Manager	Collection Consulting Group	lawrence@collectionconsulting.com	Hot	Working - Contacted	28/10/2024, 12:37
4	Martha Newman	Social Media Marketing Manager	FoodStars.Org	martha.newman@foodstars.org	Hot	Working - Contacted	28/10/2024, 12:37
5	Manisha Visvanathan	Senior Growth Marketing Manager	Growlers and Stuff Craft Brewery	manishavis@growlers.com	Open	Not Contacted	28/10/2024, 12:37
6	Jay Farley	Content Marketing Manager	Random Wishes Builders	jayfarley1985@wishes.com	Open	Not Contacted	28/10/2024, 12:37

To Do List

Activate Windows
Go to Settings to activate Windows.

87°F Mostly sunny

Search

9:47 AM 10/31/2024 PRE

Part B Task 5: Create Email Templates



Insert a screenshot showing an email that can be sent to either Martha Newsom or Lawrence Ramirez. The email should include a merge field for the recipient's first name.



P A T H S T R E A M

Part B Task 5: Screenshot

Sales Home Opportunities Leads Tasks Files Notes Accounts

Email Templates

Recent

Created by Me

Private Email Templates

Public Email Templates

All Email Templates

Folders

All Folders

Created by Me

Shared with Me

EMAIL TEMPLATES

Email Template Name: Quick Follow-Up on Our Last Email

Description: Follow up emails on social network marketing

New Email Template

Information

Email Template Name: SimplySocial Merge Email follow up

Related Entity Type: None

Description: Follow up emails on social network marketing

Folder: Private Email Templates

Select Folder

Message Content

Subject: Quick Follow Up on Our Last Email

Enhanced Letterhead: Search Enhanced Letterheads...

HTML Value:

Hi {{FirstName}},
I hope this message finds you well! I wanted to reach out to see if you had a chance to review our previous email regarding SimplySocial's platform and how it could support your social media management needs. We'd love to set up a brief call to answer any questions and discuss how our tools might benefit your team.
Please let me know if you'd be open to a chat with Sandro sometime soon. We're here to help and look forward to connecting!
Best regards,
Goodluck
Sales Operations Team, SimplySocial

Cancel Save

To Do List

79°F Mostly sunny

Search

11:43 PM 11/10/2024



P A T H S T R E A M

Part B Task 6: Convert Leads

Screenshots on the following slides to show the updates you've made to each lead according to the directions below:

Step 1: Screenshot Kathy Snyder's lead record page.

- Make sure your screenshot shows the lead's name, the note you created, and that their lead status in the lead path is updated to Closed – Not Converted.

Step 2: Screenshot Janet Steinberg's lead record page.

- Make sure your screenshot shows the lead's name, the note you created, and that their lead status in the lead path is updated to Closed – Not Converted.

Step 3: Screenshot the popup after converting Martha Newman.

- This is the popup labeled "Your lead has been converted". Make sure that the screenshot shows the Account, Contact, and Opportunity that have been created.

Step 4: Screenshot the popup after converting Lawrence Ramirez.

- Make sure to show that an Account, Contact, and Opportunity have been created.



P A T H S T R E A M

Part B Task 6: Step 1 screenshot

The screenshot shows a Salesforce Lead record for Ms. Kathy Snyder. The lead's title is Regional General Manager, and she works at TNR Corp. with the phone number (860) 273-0123 and email ksynder@tnr.net. The status is "Closed - Not Converted". The activity timeline shows an upcoming task for a call on November 11, 2023. The related section indicates no potential duplicates were found. The notes section shows a follow-up result from Goodluck Eneje on November 11, 2024, where Kathy didn't answer the first call.

Lead
Ms Kathy Snyder

Title: Regional General Manager Company: TNR Corp. Phone (2): (860) 273-0123 Email: ksynder@tnr.net

Status: Closed - Not Converted

Activity

Upcoming & Overdue

October • 2024

Call Follow Up

You have an upcoming task

Call

You logged a call

To Do List

99°F Mostly sunny

79°F Mostly sunny

Search

Last Month

11 Nov 2023

Filters: All time • All activities • All types

Refresh • Expand All • View All

Related

We found no potential duplicates of this Lead.

No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Notes (2)

Follow up Result

11/11/2024, 08:59 by Goodluck Eneje

Kathy didn't answer the first call, so Sandro tried calling again per the task created in Salesforce earlier. They did not answer the call once again.

12:00 AM
11/11/2024



P A T H S T R E A M

Part B Task 6: Step 2 screenshot

The screenshot shows a Salesforce Lightning interface for a Lead record. The lead's name is Janet Steinberg, with the title Social Media Marketing Manager at Costumez Warehouse. The status is set to Closed - Not Converted. The activity section shows an upcoming task and an email sent to Janet Steinberg on 12 Nov 2023. The related section indicates no potential duplicates were found. The notes section contains two entries from Goodluck Eneje and Sandro. The bottom navigation bar includes icons for To Do List, Weather (79°F, Mostly sunny), Search, and various system applications.

Lead
Janet Steinberg

Title
Social Media Marketing Manager

Company
Costumez Warehouse

Phone (2)

Email
janet.steinberg@costumez.com

Closed - Not Converted

Converted

Activity

Details

Chatter

Log a Call

New Task

New Event

Email

Upcoming & Overdue

Follow Up

You have an upcoming task

12 Nov 2023

Filters: All time • All activities • All types

Refresh • Expand All • View All

October • 2024

Introduction to SimplySocial's Solutions for Enhanced Social Me...

You sent an email to Janet Steinberg

Bounced

Last Month

16:36 | 31 Oct

Related

We found no potential duplicates of this Lead.

No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Notes (2)

Follow up Result

11/11/2024, 09:03 by Goodluck Eneje

Sandro had a meeting scheduled with Janet set for Nov 12th, but he received an email from her saying that her team is actually satisfied with their current...

To Do List

79°F
Mostly sunny

Search

12:04 AM
11/11/2024



P A T H S T R E A M

Part B Task 6: Step 3 screenshot

Your lead has been converted



ACCOUNT

FoodStars.Org	
Type:	
Phone:	
Website:	
Account Owner:	Goodluck Eneje
Account Site:	

CONTACT

Martha Newman	
Ti... Social Media Marketing M...	
Account Name: FoodStars.Org	
Phone:	
Em... martha.newman@foodst...	
Mobile: (323) 784-7927	

OPPORTUNITY

FoodStars.Org-	
Account Name: FoodStars.Org	
Close Date: 31/12/2024	
Amount:	
Opportunity Ow... Goodluck E...	

New Task Go to Leads

Last Month 31 Oct 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 budget...

79°F Mostly sunny

12:14 AM 11/11/2024



P A T H S T R E A M

Part B Task 6: Step 4 screenshot

Your lead has been converted



ACCOUNT

Collection Consulting Group
Type: **Collection Co...**
Phone: **(346) 269-7771**
Website: **collectioncons...**
Account Owner: **Goodluck Eneje**
Account Site: **collectioncons...**

CONTACT

Lawrence Ramirez
Title: **Digital Marketing Manager**
Account ... **Collection Consulti...**
Account ... **Collection Consulti...**
Phone: **(346) 269-7771**
E... **lawrence@collectioncons...**
Mobile: **(346) 269-7771**

OPPORTUNITY

Collection Consulting Gro...
Account ... **Collection Consulti...**
Close Date: **31/12/2024**
Amount: **1000000**
Opportunity Ow... **Goodluck E...**

New Task Go to Leads

Last Month 31 Oct 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 big...

79°F Mostly sunny

Search

12:16 AM 11/11/2024