


SFC-MOD5-ASSIGNMENT-1

Tasks To Be Performed:

- A. Create an auto-response rule created for the fresh leads coming into the organization.

 **SETUP**

Lead Auto-Response Rules

Web-to-Lead Auto-Response Rule

Auto response lead

Help for this Page

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

Rule Detail

Rule Name

Auto response lead

Active

✓

Created By

SDR, 10/21/2023, 6:59 PM

Modified By

SDR, 10/21/2023, 7:01 PM

Edit

Edit


Rule Entries

New


Reorder

Action	Order	Criteria	Sent From (Email)	Template
Edit Del	<input type="text" value="1"/>		Team Glamake (sayadreshma1217@gmail.com)	Lead response

- B. Apply lead scoring to the prospects (or potential customer) for optimizing the input leads to generate more revenue by following the customer who is likely to get converted into sales.

 Marketing


Home Chatter Campaigns **Leads** Contacts Opportunities Reports Dashboards New Courses



Leads

Lead By Status

New Intelligence View Import Add to Campaign Change Status



27 items • Sorted by Name • Filtered by My leads • Updated a few seconds ago

<input type="checkbox"/>	Name ↑	Email	Rating	Lead Pri...	Company	State/Pr...	Lead Status	Owner ...
<input type="checkbox"/>	12 Kristen Akin	kakin@athenahome.com		Low	Aethna Home Products	VA	Working - Contacted	SR
<input type="checkbox"/>	13 Mike Braund	likeb@metro.com		Low	Metropolitan Health Services	MD	Open - Not Contacted	SR
<input type="checkbox"/>	14 Norm May	norm_may@greenwich.net		Low	Greenwich Media	OH	Working - Contacted	SR
<input type="checkbox"/>	15 Pamela Owenby	pam_owenby@hendricksontrading.com		Low	Hendrickson Trading	PA	Closed - Not Converted	SR
<input type="checkbox"/>	16 Pat Stumuller	pat@pyramid.net		Low	Pyramid Construction Inc.		Closed - Converted	SR
<input type="checkbox"/>	17 Patricia Feager	patricia_feager@is.com		Low	International Shipping Co.	NC	Working - Contacted	SR
<input type="checkbox"/>	18 Phyllis Cotton	pcotton@abbottins.net		Low	Abbott Insurance	VA	Open - Not Contacted	SR
<input type="checkbox"/>	19 Reshma Sayed	sayadibrahim79@gmail.com		Low	Amazon	TX	Open - Not Contacted	SR
<input type="checkbox"/>	20 Sandra Eberhard	sandra_e@highland.net		Low	Highland Manufacturing Ltd.	CA	Working - Contacted	SR
<input type="checkbox"/>	21 Sayyad Reshma	sayyadreshma1217@gmail.com	Warm	Low	ABCD	Andhra ...	Open - Not Contacted	SR
<input type="checkbox"/>	22 Sayyad Reshma	sayadreshma1217@gmail.com	Hot	Low	ABCD	Andhra ...	Open - Not Contacted	SR
<input type="checkbox"/>	23 SD Reshma	sayadreshma7867@gmail.com	Hot	High	ABCDE	Andhra ...	Open - Not Contacted	SR
<input type="checkbox"/>	24 Shelly Brownell	shellyb@westerntelecom.com		Low	Western Telecommunications Corp.	CA	Working - Contacted	SR
<input type="checkbox"/>	25 Tom James	tom.james@delphi.chemicals.com		Low	Delphi Chemicals	MN	Working - Contacted	SR
<input type="checkbox"/>	26 Violet Macleod	violetm@emersontransport.com		Low	Emerson Transport	GA	Working - Contacted	SR
<input type="checkbox"/>	27 [not provided]			Low	[not provided]		Open - Not Contacted	SR

C. Create assignment rules for assigning leads of various categories to different sales executives according to the product type.

SETUP

Lead Assignment Rule

Auto Assignment lead

Help for this Page

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

Rule Detail

Rule Name

Auto Assignment lead

Active

✓

Created By

SD R, 10/21/2023, 7:19 PM

Modified By

SD R, 11/4/2023, 12:38 PM

Rule Entries

New

Reorder

Action	Order	Criteria	Assign To	Email
<div>Edit Del</div>	<div>1</div>	Lead: Company EQUALS TX	West Queue	✓

D. Add leads to Campaign in Salesforce through Campaign Member Object.

Marketing

Home

Chatter

Campaigns

Leads

Contacts

Opportunities

Reports

Dashboards

New Courses

Campaign

Glamake

New Contact

New Opportunity

New Case

product 1

Closed Won

Amount: INR 20,000.00

Close Date: 11/16/2023

View All

Campaign Members

Add Leads

Add Contacts

Number of Members

4

View All