

# SALES AND MARKETING APPLICATIONS

Salesforce Admin Certification Study Guide

10% of Exam Content

## OVERVIEW

This section covers 10% of the Salesforce Administrator certification exam and focuses on sales and marketing functionality. You'll learn about opportunities, leads, products, forecasting, productivity tools, and Einstein AI features that help sales teams close deals faster.

## 1. OPPORTUNITIES AND SALES PROCESS

### What is an Opportunity?

An Opportunity represents a potential sale or deal. It tracks a prospect through the sales process from initial interest to closed won or lost. Think of it as tracking a customer's journey from 'maybe interested' to 'purchased' (or 'not this time').

### Key Opportunity Fields

- Opportunity Name: Descriptive name (e.g., 'Acme Corp - 500 Licenses')
- Account: The company/organization (required)
- Amount: Expected revenue from the deal
- Close Date: When you expect to close the deal
- Stage: Current position in the sales process
- Probability: Likelihood of closing (0-100%)
- Forecast Category: Classification for forecasting

### Opportunity Stages

Stages represent steps in your sales process. Each stage has a probability percentage and forecast category.

### Standard Opportunity Stages

- Prospecting (10%): Initial research and qualification
- Qualification (10%): Determining if prospect is a good fit
- Needs Analysis (20%): Understanding requirements
- Value Proposition (50%): Presenting solution
- Id. Decision Makers (60%): Identifying key stakeholders
- Perception Analysis (70%): Understanding concerns
- Proposal/Price Quote (75%): Formal proposal submitted

- Negotiation/Review (90%): Final terms discussion
- Closed Won (100%): Deal is won!
- Closed Lost (0%): Deal is lost

## Sales Process

A Sales Process controls which Stage picklist values are available for different types of opportunities. It works with Record Types.

### How Sales Processes Work

- Similar to Support Processes for Cases
- One Sales Process per Record Type
- Define which stages apply to different sales scenarios
- Example: New Business vs. Renewal opportunities have different stages
- If no Record Types exist, Master Sales Process applies to all

### Forecast Categories

Each stage is assigned a Forecast Category that determines how it appears in forecasts:

- **Pipeline:** Early stage, lower confidence (Prospecting, Qualification)
- **Best Case:** Likely to close but not committed (Needs Analysis, Value Prop)
- **Commit:** High confidence, committed forecast (Negotiation/Review)
- **Closed:** Deal is won
- **Omitted:** Not included in forecasts (often Closed Lost)

#### EXAM TIP

Sales Process + Record Type = Controlled stages. Probability auto-populates based on stage. The Expected Revenue field = Amount × Probability (calculated automatically).

## 2. FORECASTING, PRODUCTS, PRICE BOOKS, QUOTES & ORDERS

### Forecasting

Forecasting predicts future revenue based on opportunities in the pipeline. Salesforce offers Customizable Forecasting and Collaborative Forecasting.

#### How Forecasting Works

- Based on Opportunity Amount and Close Date
- Opportunity Probability affects Expected Revenue
- Forecast Categories organize opportunities by confidence
- Roll up through role hierarchy or territories

#### Collaborative Forecasting

- More advanced than Customizable Forecasting
- Team-based revenue predictions
- Managers can adjust forecasts and add comments
- Territory-based or Role hierarchy-based
- Submit forecasts for manager review

### Products

Products are items or services your company sells. They must be added to opportunities to track what's being sold.

#### Product Setup

- Product Name: Display name
- Product Code: Unique identifier (SKU)
- Product Family: Category grouping
- Active: Checkbox to enable/disable
- Must be added to Standard Price Book first

### Price Books

Price Books are catalogs of products with their associated prices. They allow different pricing for different customer segments or regions.

#### Standard Price Book

- Master list of all products
- Contains standard/list prices
- Products MUST be added here first
- Cannot be deleted or renamed

#### Custom Price Books

- Created for specific purposes
- Examples: Regional pricing, Volume discounts, Partner pricing
- Products must exist in Standard Price Book before adding to custom
- Can have different prices than standard

## Price Book Entries

- Junction object between Product and Price Book
- Contains: List Price, Use Standard Price checkbox
- Active checkbox controls visibility

## Quotes

Quotes are formal price proposals sent to customers. They capture product details, pricing, and terms at a specific point in time.

## Quote Features

- Created from Opportunities
- Include products from the opportunity
- Can sync with opportunity (Syncing Quote)
- Generate PDF quotes for customers
- Track Quote Status: Draft, In Review, Approved, Rejected

## Orders

Orders represent the actual purchase when a customer accepts a quote. They trigger fulfillment processes.

## Order Features

- Reduces Opportunity to Order feature must be enabled
- Created from Quotes or Opportunities
- Contains order products and quantities
- Track Order Status: Draft, Activated
- Can link to Contracts

### EXAM TIP

Products must go in Standard Price Book FIRST. Custom Price Books reference Standard Price Book. Quote → Order flow requires enabling 'Reduce Opportunity to Order'.

## 3. LEAD MANAGEMENT AND CONVERSION

### What is a Lead?

A Lead is an individual who has expressed interest in your products or services but hasn't been qualified yet. Think of leads as potential customers at the very beginning of the sales journey.

### Key Lead Fields

- Name: First and Last Name
- Company: Organization name
- Email and Phone
- Lead Status: Position in qualification process
- Lead Source: How you acquired the lead
- Rating: Priority indicator (Hot, Warm, Cold)

### Lead Conversion

Lead Conversion happens when a lead is qualified and ready to become a customer. The lead is converted into an Account, Contact, and optionally an Opportunity.

### What Happens During Conversion

1. **Account is created** (or matched to existing account)
2. **Contact is created** (person from the lead)
3. **Opportunity is created** (optional, if there's a deal to track)
4. **Lead is marked as converted** (read-only, cannot be edited)
5. **Custom fields can map** to Account, Contact, or Opportunity

### Lead Conversion Settings

- Require Validation: Enforce validation rules on convert
- Preserve Lead Status: Keep original status or update
- Account/Contact Settings: Match existing or create new
- Opportunity Settings: Choose name and owner

#### EXAM TIP

After conversion, the Lead becomes read-only and CANNOT be edited or deleted (unless you have 'Delete Converted Leads' permission). The system creates Account + Contact (always) and Opportunity (optional).

## 4. LEAD ASSIGNMENT & AUTO-RESPONSE RULES

### Lead Assignment Rules

Lead Assignment Rules automatically assign incoming leads to the right users or queues based on criteria.

## How Assignment Rules Work

- Only ONE assignment rule can be active at a time
- Each rule has multiple entries (processed in order)
- First matching entry wins
- Can assign to Users or Queues
- Criteria: Lead Source, Industry, Geography, etc.

## Example Scenario

If Lead Source = Web AND Country = USA, assign to US Sales Team Queue. If Industry = Healthcare, assign to Healthcare Sales Rep.

## Lead Auto-Response Rules

Auto-Response Rules send automatic email acknowledgments to leads when they're created.

## Key Concepts

- Only ONE auto-response rule active at a time
- Uses Email Templates
- Sends to the lead's email address
- Typically triggered by Web-to-Lead forms
- Confirms receipt and sets expectations

### EXAM TIP

Lead Assignment Rules work just like Case Assignment Rules. Auto-Response Rules are similar to Case Auto-Response Rules. Remember: Only ONE of each can be active.

## 5. WEB-TO-LEAD AND CAMPAIGN MANAGEMENT

### Web-to-Lead

Web-to-Lead allows you to capture leads directly from your website and automatically create them in Salesforce.

#### Setup Process

6. Enable Web-to-Lead in Setup
7. Generate HTML form code
8. Select fields to capture
9. Specify return URL (thank you page)
10. Add HTML to your website

#### Key Features

- Captures up to 500 leads per day
- Supports reCAPTCHA spam protection
- Can trigger assignment and auto-response rules
- Default Lead Source: Web
- Can set default lead owner

### Campaign Management

Campaigns track marketing initiatives and their effectiveness. Examples: webinars, trade shows, email campaigns, advertisements.

#### Campaign Fields

- Campaign Name
- Campaign Type: Email, Webinar, Conference, Advertisement
- Status: Planned, In Progress, Completed, Aborted
- Start Date and End Date
- Budgeted Cost and Actual Cost
- Expected Revenue
- Active checkbox

#### Campaign Members

Campaign Members are Leads or Contacts associated with a campaign.

- Junction object between Campaign and Lead/Contact
- Member Status: Sent, Responded, Attended (customizable)
- One or more statuses can be marked as 'Responded'
- Used to track campaign ROI

#### Campaign Hierarchies

- Parent Campaigns can have Child Campaigns
- Roll up statistics to parent level

- Example: Trade Show (parent) → Booth Demo, Dinner Event (children)

## Campaign Influence

- Tracks which campaigns influenced opportunities
- Primary Campaign: First or most important campaign
- Multi-touch attribution available with Campaign Influence

### EXAM TIP

Web-to-Lead has 500/day limit. Campaign Members can be Leads OR Contacts. Campaign Member Status with 'Responded' checked counts toward campaign ROI metrics.

## 6. PRODUCTIVITY TOOLS

### Path

Path provides visual guidance for sales processes. It displays key fields and helps users move records through stages efficiently.

#### Path Features

- Visual progress bar showing current stage
- Key Fields displayed for each stage
- Guidance for Success text
- Works with: Leads, Opportunities, Cases, Custom Objects
- Based on picklist fields (Stage, Status)
- Can have different paths per Record Type

#### Path Configuration

- Created in Setup > Path Settings
- Select picklist field to track
- Define key fields for each stage
- Add guidance text

### Kanban

Kanban view displays records as cards organized by a picklist field (like Stage). Users drag and drop to move records between stages.

#### Kanban Features

- Visual pipeline view
- Drag and drop to update records
- Works with List Views
- Group by any picklist field
- Summarize by sum, count, or other aggregation
- Quick inline editing

### Contact Roles

Contact Roles link multiple contacts to an opportunity and define their involvement in the deal.

#### Contact Role Features

- Associate multiple contacts with one opportunity
- Define Role: Decision Maker, Economic Buyer, Influencer, etc.
- Mark one contact as Primary
- Roles are customizable

## Opportunity Teams

Opportunity Teams allow multiple users to collaborate on a deal with defined roles and access levels.

### Team Features

- Add multiple users to an opportunity
- Define Team Role: Sales Rep, Sales Engineer, Account Manager
- Set Opportunity Access level: Read Only or Read/Write
- Default Opportunity Teams: Pre-configured team templates
- Can split opportunity credit among team members

## Sales Console

The Sales Console is a specialized Lightning app designed for sales reps, providing a unified workspace similar to Service Console.

### Console Features

- Workspace tabs for multitasking
- Split view for lists
- Utility bar with quick tools
- Related lists in subtabs
- Quick access to accounts, contacts, opportunities

### EXAM TIP

Path guides users through stages. Kanban provides drag-and-drop visualization. Contact Roles link contacts to opportunities. Opportunity Teams link users to opportunities with access levels.

## 7. EINSTEIN AI FOR SALES

### Homepage Assistant

Einstein Homepage Assistant surfaces key insights and recommended actions on the Salesforce homepage.

#### What It Provides

- Key deals requiring attention
- Upcoming tasks and events
- Recent email activity
- News about accounts
- Suggested next actions

### Einstein Lead Scoring

Einstein Lead Scoring uses AI to predict which leads are most likely to convert based on historical data.

#### How It Works

- Analyzes your historical lead conversions
- Identifies patterns and factors that indicate conversion
- Assigns score from 1-99 (higher = more likely to convert)
- Displays insights explaining the score
- Updates scores regularly as new data comes in

#### Requirements

- Minimum 1,000 leads required
- At least 120 conversions in past 6 months
- Einstein Analytics Plus license

### Einstein Opportunity Scoring

Einstein Opportunity Scoring predicts which opportunities are most likely to close based on historical patterns.

#### How It Works

- Analyzes won and lost opportunities
- Identifies factors that predict wins
- Assigns score from 1-99
- Shows positive and negative factors
- Helps reps prioritize their pipeline

#### Requirements

- Minimum 200 closed/won opportunities

- At least 200 closed/lost opportunities
- Einstein Analytics Plus license

## Other Einstein for Sales Features

### Einstein Activity Capture

- Automatically logs emails and events to Salesforce
- Syncs with Outlook or Gmail
- Recommends contacts and opportunities to relate

### Einstein Forecasting

- AI-powered forecast predictions
- Adjusts based on historical accuracy
- Identifies deals at risk

### Einstein Conversation Insights

- Analyzes sales calls and meetings
- Identifies keywords and trends
- Provides coaching recommendations

#### EXAM TIP

Einstein Lead Scoring and Opportunity Scoring both require historical data and Einstein Analytics Plus license. Scores range from 1-99. Higher scores = higher likelihood of conversion/close.

## QUICK REFERENCE SUMMARY

Feature	Key Points
<b>Opportunities</b>	Track deals. Stage, Amount, Close Date. Probability auto-populates. Forecast Categories.
<b>Sales Process</b>	Controls Stage values. Works with Record Types. One per Record Type.
<b>Products &amp; Price Books</b>	Products go in Standard Price Book first. Custom Price Books for specialized pricing.
<b>Leads</b>	Potential customers. Convert to Account + Contact + Opportunity (optional).
<b>Lead Conversion</b>	Creates Account + Contact. Optional Opportunity. Lead becomes read-only.
<b>Web-to-Lead</b>	Capture leads from website. 500/day limit. Triggers assignment/auto-response.
<b>Campaigns</b>	Marketing initiatives. Members = Leads/Contacts. Statuses track engagement.
<b>Path</b>	Visual stage guidance. Key fields per stage. Guidance for Success text.
<b>Kanban</b>	Drag-and-drop pipeline view. Group by picklist. Works with List Views.
<b>Contact Roles</b>	Link contacts to opportunities. Define roles. Mark primary contact.
<b>Einstein Scoring</b>	Lead & Opportunity scores 1-99. Requires historical data. Einstein Analytics Plus.

## CRITICAL EXAM TIPS

11. **Expected Revenue Formula:**  $\text{Amount} \times \text{Probability} = \text{Expected Revenue}$  (calculated automatically, not manually entered).
12. **Sales Process:** Controls Stage values like Support Process controls Case Status. One per Record Type.

13. **Price Book Requirement:** Products MUST be added to Standard Price Book first before any custom price books.
14. **Lead Conversion:** Always creates Account + Contact. Opportunity is optional. Converted leads are read-only.
15. **Web-to-Lead Limit:** 500 leads per day maximum. Use reCAPTCHA to prevent spam.
16. **Campaign Members:** Can be Leads OR Contacts. Member Status with 'Responded' checked counts toward ROI.
17. **Path vs Kanban:** Path shows key fields and guidance. Kanban is drag-and-drop visual pipeline.
18. **Contact Roles vs Opportunity Teams:** Contact Roles = external contacts. Opportunity Teams = internal users.
19. **Einstein Scoring Requirements:** Lead: 1,000 leads + 120 conversions. Opportunity: 200 won + 200 lost.
20. **Forecast Categories:** Pipeline (early), Best Case (likely), Commit (committed), Closed (won), Omitted (excluded).

## PRACTICE SCENARIOS

### **Scenario 1:**

Your company wants to offer different pricing to enterprise customers vs small businesses. How should you configure this?

**Answer:** Create custom price books. First, add all products to the Standard Price Book with standard pricing. Then create two custom price books: 'Enterprise Pricing' and 'Small Business Pricing' with appropriate prices for each segment. Associate the correct price book with opportunities based on customer type.

### **Scenario 2:**

A lead named John Smith from Acme Corp is qualified and ready to purchase. What happens when you convert the lead?

**Answer:** Salesforce creates: (1) Account record for 'Acme Corp', (2) Contact record for 'John Smith', and (3) optionally an Opportunity if you check that box. The original lead becomes read-only and cannot be edited. You can choose to link to an existing account if Acme Corp already exists.

### **Scenario 3:**

Sales reps need guidance on what information to gather at each opportunity stage. Which feature helps with this?

**Answer:** Path. Configure Path to display key fields that need to be completed at each stage (like 'Next Steps' in Qualification or 'Decision Date' in Negotiation). Add 'Guidance for Success' text to provide coaching tips. This appears at the top of opportunity records and guides reps through the sales process.

**Scenario 4:**

You want to track which marketing webinar influenced each deal. How do you accomplish this?

**Answer:** Use Campaigns and Campaign Influence. Create a Campaign for the webinar. Add attendees as Campaign Members (from Leads or Contacts). When those members are associated with opportunities, you can set the Campaign as the Primary Campaign on the opportunity, or enable Campaign Influence to track multiple campaigns that contributed to the deal.

**Good luck with your Salesforce Admin Certification Exam!**

Master these sales concepts and you'll be well-prepared for success!