



Lead Management in Salesforce

Independent Project: Use Salesforce to Identify Sales Prospects

Taofik Bankole Sanni

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

Part A, Task 1: Screenshot



~~PATH~~ STREAM

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 Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People More

New Import Add to Campaign Change Status Change Owner

	Name ↑	Company	State/Pr...	Email	Lead Status	Created Date	Owner Alias	Unread ...
1	Chidi Seydou	Attitude Talent Agency		chidiseydou415@attitude.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
2	Danika Marcia	Ted's Toy Shop		danika@tedstoys.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
3	Denise Choi	Yaloo Search		dchoi@yaloooyos.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
4	Janet Steinberg	Costumez Warehouse		janet.steinberg@costumez.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
5	Jay Farley	Random Wishes Builders		jayfarley1985@wishes.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
6	Kiran Stefcia	Kiran and Co Marketers		kiranstefcia@marketersco.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
7	Lawrence Ramirez	Collection Consulting Group		lawrence@collectionconsulting.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
8	Manisha Visvanathan	Growlers and Stuff Craft Brewery		manishavis@growlers.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
9	Martha Newman	FoodStars.Org		martha.newman@foodstars.org	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
10	Thandiwe Bandi	Jazz Mystics Music Group		tbandi@jazzmystics.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>

To Do List

Type here to search

27°C Mostly cloudy 8:02 PM 5/29/2023



P A T H S T R E A M

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 DEMO LEADS

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

	Name ↑	Company	Email	Lead Status	Created Date	Owner Alias	Unread ...
1	Chidi Seydou	Attitude Talent Agency	chidiseydou415@attitude.com	Open - Not Contacted	29/05/2023, 19:58	Tsann	<input checked="" type="checkbox"/>
2	Danika Marcia	Ted's Toy Shop	danika@tedstoys.com	Open - Not Contacted	29/05/2023, 19:58	Tsann	<input checked="" type="checkbox"/>
3	Denise Choi	Yaloo Search	dchoi@yaloooyos.com	Open - Not Contacted	29/05/2023, 19:58	Tsann	<input checked="" type="checkbox"/>
4	Janet Steinberg	Costumez Warehouse	janet.steinberg@costumez.com	Open - Not Contacted	29/05/2023, 19:58	Tsann	<input checked="" type="checkbox"/>
5	Jay Farley	Random Wishes Builders	jayfarley1985@wishes.com	Open - Not Contacted	29/05/2023, 19:58	Tsann	<input checked="" type="checkbox"/>
6	Kiran Stefcia	Kiran and Co Marketers	kiranstefcia@marketersco.com	Open - Not Contacted	29/05/2023, 19:58	Tsann	<input checked="" type="checkbox"/>
7	Lawrence Ramirez	Collection Consulting Group	lawrence@collectionconsulting.com	Open - Not Contacted	29/05/2023, 19:58	Tsann	<input checked="" type="checkbox"/>
8	Manisha Visvanathan	Growlers and Stuff Craft Brewery	manishavis@growlers.com	Open - Not Contacted	29/05/2023, 19:58	Tsann	<input checked="" type="checkbox"/>
9	Martha Newman	FoodStars.Org	martha.newman@foodstars.org	Open - Not Contacted	29/05/2023, 19:58	Tsann	<input checked="" type="checkbox"/>
10	Thandive Bandi	Jazz Mystics Music Group	tbandi@jazzmystics.com	Open - Not Contacted	29/05/2023, 19:58	Tsann	<input checked="" type="checkbox"/>

To Do List

On-Screen Keyboard

Windows Taskbar: Type here to search, File Explorer, Edge, Mail, Firefox, File Manager, Google Chrome, File Explorer, Task View, Taskbar icons.

System tray: Weather (27°C Mostly cloudy), Battery (8:08 PM 5/29/2023).



P A T H S T R E A M

Part A, Task 3: Step 2 screenshot

On-Screen Keyboard

~	! 2	3	\$ 4	5	6	7	8	(9)	0	- +	=	Del
Tab	Q	W	E	R	T	Y	U	I	O	P	[]	\
Caps	A	S	D	F	G	H	J	K	L	:	Enter	End
Shift	Z	X	C	V	B	N	M	<	>	? /	Shift	PgUp
Fn	Ctr	Alt										PgDn
Fn	Ctr	Alt										My Up
Fn	Ctr	Alt										My Dn
Fn	Ctr	Alt										Insert
Fn	Ctr	Alt										Pause
Fn	Ctr	Alt										PrtScn
Fn	Ctr	Alt										ScrLk
Fn	Ctr	Alt										Dock
Fn	Ctr	Alt										Options
Fn	Ctr	Alt										Help
Fn	Ctr	Alt										Fade

Leads DEMO 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 ...
1	Chidi Seydou	Attitude Talent Agency		chidiseydou415@attitude.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
2	Danika Marcia	Ted's Toy Shop		danisika@tedstoys.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
3	Denise Choi	Yaloo Search		dchoi@yaloooyos.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
4	Janet Steinberg	Costumez Warehouse		janet.steinberg@costumez.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
5	Jay Farley	Random Wishes Builders		jayfarley1985@wishes.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
6	Kiran Stefcia	Kiran and Co Marketers		kiranstefcia@marketersco.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
7	Lawrence Ramirez	Collection Consulting Group		lawrence@collectionconsulting.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
8	Manisha Visvanathan	Growlers and Stuff Craft Brewery		manishavis@growlers.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
9	Martha Newman	FoodStars.Org		martha.newman@foodstars.org	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>
10	Thandwe Bandi	Jazz Mystics Music Group		tbandi@jazzmystics.com	Open - Not Contacted	29/05/2023, 19:58	TSann	<input checked="" type="checkbox"/>

To Do List

Type here to search

27°C Mostly cloudy 8:19 PM 5/29/2023



P A T H S T R E A M

Part A, Task 3: Step 3 screenshot

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

DEMO LEADS

	Name ↑	Lead Status	Title	Company	Mobile	Email	St... ↓	Created Date	Ow... ↓	U... ↓
1	Chidi Seydou	Open - Not Contact...	Social Media Intern	Attitude Talent Agency	(851) 923-3824	chidiseydou415@attitude.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
2	Danika Marcia	Open - Not Contact...	Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	danika@tedstoys.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
3	Denise Choi	Open - Not Contact...	Director of Marketing Operati...	Yaloo Search	(824) 617-6033	dchoi@yaloooyos.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
4	Janet Steinberg	Open - Not Contact...	Social Media Marketing Mana...	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
5	Jay Farley	Open - Not Contact...	Content Marketing Manager	Random Wishes Builders	(735) 716-5095	jayfarley1985@wishes.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
6	Kiran Stefcia	Open - Not Contact...	Director of Marketing	Kiran and Co Marketers	(347) 810-3329	kiranstefcia@marketersco.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
7	Lawrence Ramirez	Open - Not Contact...	Digital Marketing Manager	Collection Consulting Group	(346) 269-7771	lawrence@collectionconsultin...		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
8	Manisha Visvanath...	Open - Not Contact...	Senior Growth Marketing Ma...	Growlers and Stuff Craft Brew...	(326) 598-4003	manishavis@growlers.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
9	Martha Newman	Open - Not Contact...	Social Media Marketing Mana...	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
10	Thandiwe Bandi	Open - Not Contact...	Social Media Marketer	Jazz Mystics Music Group	(441) 709-5905	tbandi@jazzmystics.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>

To Do List

27°C Partly cloudy 8:32 PM 5/29/2023



P A T H S T R E A M

Part A, Task 3: Step 4 screenshot

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups * DEMO LEADS | Leads More

Leads DEMO LEADS

10 items • Sorted by Name • Filtered by All leads - Created Date, Lead Status • Updated 16 minutes ago

	Name ↑	Lead Status	Title	Company	Mobile	Email	St... ↓	Created Date	Ow... ↓	U... ↓
1	Chidi Seydou	Open - Not Contact...	Social Media Intern	Attitude Talent Agency	(851) 923-3824	chidiseydou415@attitude.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
2	Danika Marcia	Open - Not Contact...	Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	danika@tedtoys.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
3	Denise Choi	* Open - Not Contacted	Marketing Strategist	Yaloo Search	(824) 617-6033	dchoi@yaloooyos.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
4	Janet Steinberg	Open - Not Contact...	Social Media Marketing Mana...	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
5	Jay Farley	Open - Not Contact...	Content Marketing Manager	Random Wishes Builders	(735) 716-5095	jayfarley1985@wishes.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
6	Kiran Stefcia	Open - Not Contact...	Director of Marketing	Kiran and Co Marketers	(347) 810-3329	kiranstefcia@marketersco.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
7	Lawrence Ramirez	Open - Not Contact...	Digital Marketing Manager	Collection Consulting Group	(346) 269-7771	lawrence@collectionconsultin...		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
8	Manisha Visvanath...	Open - Not Contact...	Senior Growth Marketing Ma...	Growlers and Stuff Craft Brew...	(326) 598-4003	manishavis@growlers.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
9	Martha Newman	Open - Not Contact...	Social Media Marketing Mana...	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>
10	Thandiwe Bandi	Open - Not Contact...	Social Media Marketer	Jazz Mystics Music Group	(441) 709-5905	tbandi@jazzmystics.com		29/05/2023, 19:...	TSann	<input checked="" type="checkbox"/>

On-Screen Keyboard

Search... Search this list...

New Import Add to Campaign Change Status Change Owner

27°C Partly cloudy 8:48 PM 5/29/2023



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

Screenshot of a Salesforce Lightning interface showing the "Campaign Members" list for a "Social Media Conference Email Campaign". An "On-Screen Keyboard" is overlaid on the top right.

The table displays 10 campaign members, all of whom have sent emails. The columns include:

- Type: Lead
- Status: Sent
- Name: Chidi Seydou, Danika Marcia, Denise Choi, Janet Steinberg, Jay Farley, Kiran Stefcia, Lawrence Ramirez, Manisha Visvanathan, Martha Newman, Thandiwe Bandi
- Title: Social Media Intern, Junior Marketing Associate, Director of Marketing Operations, Social Media Marketing Manager, Content Marketing Manager, Director of Marketing, Digital Marketing Manager, Senior Growth Marketing Manager, Social Media Marketing Manager, Social Media Marketer
- First Name: Chidi, Danika, Denise, Janet, Jay, Kiran, Lawrence, Manisha, Martha, Thandiwe
- Last Name: Seydou, Marcia, Choi, Steinberg, Farley, Stefcia, Ramirez, Visvanathan, Newman, Bandi
- Company: Attitude Talent Agency, Ted's Toy Shop, Valoo Search, Costumez Warehouse, Random Wishes Builders, Kiran and Co Marketers, Collection Consulting Group, Growlers and Stuff Craft Brewery, FoodStars.Org, Jazz Mystics Music Group

At the bottom of the screenshot, the Windows taskbar shows the search bar, pinned apps (File Explorer, Edge, Mail, OneDrive, Word, Google Chrome), and system icons (battery, signal, volume, clock).



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



- *The overall purpose of importing and organising data in salesforce is to have an organized place where information can be accessible to all member of the team.*
- *The major steps taken to import and organise data in salesforce include: structuring the data to make it error free, using the import wizard in the sales app to upload the data, mapping the data correctly, filtering the data and associating leads with campaigns.*
- *The imported and organized lead data in salesforce will help the marketing associates to effectively and efficiently manage their lead data and also assist the sales team to appropriately follow up on the marketing qualified leads in order to make sales.*

You have reached the end of Part A!



Make sure your screenshots are embedded in the appropriate slides before moving on. Note that you will complete Part B of this Independent Project at the end of Week 4.

Part B Overview

- 
- 1 **Task 1: 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.



P A T H S T R E A M

Part B Task 1: Screenshot

Sanne Goldfield is currently working on a task in the DEMO LEADS1 Lead list view in Salesforce. The screenshot shows the following details:

- Lead List View:** The user is viewing the "Leads" section under "Sales". The list displays 5 items, sorted by Name, filtered by Title containing Manager, and Lead Status equals Open - Not Contacted.
- Lead Data:** The leads listed are:

Rank	Name	Lead Status	Title	Company	Mobile	Email
1	Janet Steinberg	Open - Not Contacted	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com
2	Jay Farley	Open - Not Contacted	Content Marketing Manager	Random Wishes Builders	(735) 716-5095	jayfarley1985@wishes.com
3	Lawrence Ramirez	Open - Not Contacted	Digital Marketing Manager	Collection Consulting Group	(346) 269-7771	lawrence@collectionconsulting.com
4	Manisha Visvanathan	Open - Not Contacted	Senior Growth Marketing Manager	Growlers and Stuff Craft Brewery	(320) 598-4003	manishavis@growlers.com
5	Martha Newman	Open - Not Contacted	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org
- On-Screen Keyboard:** A floating On-Screen Keyboard is visible, showing various keys including the Print Screen key (PrtScn).
- System Navigation:** The taskbar at the bottom shows the Windows Start button, a search bar, and icons for File Explorer, Mail, Photos, and Google Chrome. The system tray indicates the date and time as 4:19 PM on 7/2/2023, with a temperature of 21°C and a Windig condition.



Part B Task 2: Initiate Contact with Leads via Email

Insert screenshots to show that you've emailed Janet, Thandiwe, 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 **Thandiwe Bandi** showing you've emailed them.

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

Step 4: Past activity for **Denise Choi** showing you've emailed them.



P A T H S T R E A M

Part B Task 2: Step 1 screenshot

A screenshot of a Salesforce Lightning interface for a lead named Janet Steinberg. The lead details show her title as Social Media Marketing Manager and company as Costumez Warehouse. The status bar indicates 'Open - Not Contacted'.

An 'On-Screen Keyboard' is overlaid on the screen, with the cursor positioned over the 'PrtScn' key. A tooltip says: "Move the cursor to where you want to enter text."

The Activity tab shows no recent activity. The Chatter tab shows a message from the user: "We found no potential duplicates of this Lead." The News tab shows a message about campaign history: "Campaign History (1)".

The Related section shows a single record for a "Social Media Conference Email Campaign" with details: Start Date: 24.07.2019, Type: Email, Status: Responded.

The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray.



Part B Task 2: Step 2 screenshot

A screenshot of a Salesforce Lightning interface showing a lead record for "Thandiwe Bandi". The lead details include Title: Social Media Marketer, Company: Jazz Mystics Music Group, Phone: (2), Email: tbandi@jazzmystics.com. The status bar at the top shows multiple browser tabs and a system message: "Move the cursor to where you want to enter text." An "On-Screen Keyboard" window is open, displaying a standard QWERTY keyboard layout with additional function keys like Home, PgUp, PgDn, Insert, Delete, etc. The interface includes sections for Activity (New Task, Log a Call, New Event, Email), News, and Related (Campaign History, Social Media Conference Email Campaign). The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray.

Coursera | Online Courses & C | Project Instructions | Coursera | Martha Newman | Lead | Sale | Coursera - Lead Ma

sannevgoldfieldtd4-dev-ed.develop.lightning.force.com/lightning/r/Lead/00Q7R00001nofC1UAI/view

GOETHE-ZERTIFIKA... Goethe-Institut Nig... goethe A1 schreiben... (94) Goethe Zertif... ORION GATE CAST... IBM

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboard

Lead
Martha Newman

Title Social Media Marketing Manager Company FoodStars.Org Phone (2) Email martha.newman@foodstars.org

Open - Not Contacted Working - Contacted Closed - Not Converted Converted

Mark Status as Complete

Activity Details Chatter News

New Task Log a Call New Event Email

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.

July • 2023 This Month

PRODUCT INTRODUCTION
You sent an email to [Martha Newman](#)

No more past activities to load.

Related

We found no potential duplicates of this Lead.

Campaign History (1)

Social Media Conference Email Campaign
Start Date: 24.07.2019
Type: Email
Status: Responded

View All

To Do List

Type here to search

20°C Stark bewölkt 1:25 PM 7/3/2023

On-Screen Keyboard

Move the cursor to where you want to enter text.

Coursera | Online Courses & C × C Project Instructions | Coursera × Denise Choi | Lead | Salesforce × Coursera - Lead Ma

← → C 🔍 sannevgoldfieldtd4-dev-ed.develop.lightning.force.com/lightning/r/Lead/00Q7R00001nofBwUAI/view

GOETHE-ZERTIFIKAT... Goethe-Institut Nig... goethe A1 schreiben... (94) Goethe Zertif... ORION GATE CAST... IBM

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboard

Lead Denise Choi

Title Director of Marketing Operations Company Yalo Search Phone (2) Email dchoi@yaloooyos.com

Open - Not Contacted Working - Contacted Closed - Not Converted Converted

Mark Status as Complete

Activity Details Chatter News

New Task Log a Call New Event Email

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.

July • 2023 This Month

PRODUCT INTRODUCTION You sent an email to Denise Choi

No more past activities to load.

Related

We found no potential duplicates of this Lead.

Campaign History (1)

Social Media Conference Email Campaign

Start Date: 24.07.2019
Type: Email
Status: Responded

View All

To Do List

Type here to search

20°C Stark bewölkt 1:27 PM 7/3/2023

On-Screen Keyboard

Move the cursor to where you want to enter text.



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 Thandiwe Bandi showing logged activities.

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

Step 4: Past activity for Denise Choi showing logged activities.

Janet Steinberg | Lead | Salesforce

sannevgoldfieldtd4-dev-ed.develop.lightning.force.com/lightning/r/Lead/00Q7R00001nofBzUAI/view

GOETHE-ZERTIFIKA... Goethe-Institut Nig... goethe A1 schreiben... (94) Goethe Zertifikat... ORION GATE CAST... IBM

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboard

Lead Janet Steinberg

Title Social Media Marketing Manager Company Costumez Warehouse Phone (2) Email janet.steinberg@costumez.com

Open - Not Contacted Working - Contacted Closed - Not Converted Converted

Mark Status as Complete

New Task Log a Call New Event Email

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

Upcoming & Overdue

MEETING WITH JANET You have an upcoming event 15:00 | 12.11

July • 2023 This Month

Call You logged a call Today

FIXING OF APPOINTMENT You sent an email to Janet Steinberg Unopened 13:15 | Today

[No subject] You sent an email to Janet Steinberg Unopened 13:14 | Today

No more past activities to load.

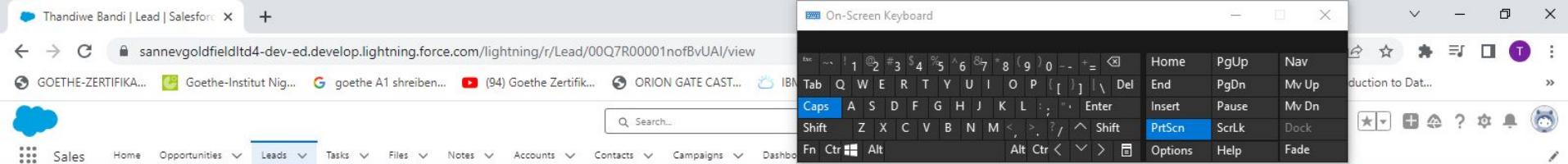
To Do List

Type here to search

On-Screen Keyboard

Move the cursor to where you want to enter text.

1:35 PM 20°C Stark bewölkt 7/3/2023



Lead
Thandiwe Bandi

Title: Social Media Marketer Company: Jazz Mystics Music Group Phone (2): Email: tbandi@jazzmystics.com

Status: Open - Not Contacted → Working - Contacted → Closed - Not Converted → Converted Mark Status as Complete

Activity Details Chatter News

New Task Log a Call New Event Email

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

Upcoming & Overdue

> **THANDI FOLLOW UP** You have an upcoming task 11:11

July • 2023 This Month

> **Call** You logged a call Today

> **PRODUCT INTRODUCTION** You sent an email to Thandiwe Bandi Unopened 13:21 | Today

No more past activities to load.

Related

We found no potential duplicates of this Lead.

Campaign History (1)

Social Media Conference Email Campaign
Start Date: 24.07.2019
Type: Email
Status: Responded

[View All](#)

Martha Newman | Lead | Sales

sannevgoldfieldtd4-dev-ed.develop.lightning.force.com/lightning/r/Lead/00Q7R00001nofC1UAI/view

GOETHE-ZERTIFIKAT... Goethe-Institut Nig... goethe A1 schreiben... (94) Goethe Zertifikat... ORION GATE CAST... IBM

Cloud Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboard

Search... Lead Martha Newman

Title Social Media Marketing Manager Company FoodStars.Org Phone (2) Email martha.newman@foodstars.org

Follow New Case Submit for Approval Clone

Open - Not Contacted Working - Contacted Closed - Not Converted Converted

Mark Status as Complete

New Task Log a Call New Event Email

Activity Details Chatter News

Upcoming & Overdue

- You have an upcoming task
- MEETING WITH MARTHA'S COMPANY You have an upcoming event

View More

July • 2023 This Month

- Call You logged a call
- PRODUCT INTRODUCTION You sent an email to Martha Newman

No more past activities to load.

Unopened 13:24 | Today

Related

We found no potential duplicates of this Lead.

New Event

Campaign

Social Media Conf

Start Date: 03.07.2023 *Time: 14:00

End Date: 03.07.2023 *Time: 15:00

All-Day Event

Save

On-Screen Keyboard

Home PgUp Nav End PgDn Mv Up Insert Pause Mv Dn PrtScn ScrLk Dock Options Help Fade

Type here to search

20°C Stark bewölkt 1:41 PM 7/3/2023

Denise Choi | Lead | Salesforce

sannevgoldfieldtd4-dev-ed.develop.lightning.force.com/lightning/r/Lead/00Q7R00001nofBwUAI/view

GOETHE-ZERTIFIKA... Goethe-Institut Nig... goethe A1 schreiben... (94) Goethe Zertifikat... ORION GATE CAST... IBM

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboard

Search... Event "MEETING WITH DENISE COMPANY" was created.

Lead Denise Choi

Title Director of Marketing Operations Company Yalo Search Phone (2) Email dchoi@yaloooyos.com

Open - Not Contacted Working - Contacted Closed - Not Converted Converted

Mark Status as Complete

Activity Details Chatter News

New Task Log a Call New Event Email

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

Upcoming & Overdue

- > Task description of product for denise company You have an upcoming task 06.07
- > Event MEETING WITH DENISE COMPANY You have an upcoming event 14:00 | Today

View More

July • 2023 This Month

- > Call Call You logged a call Today
- > Email PRODUCT INTRODUCTION You sent an email to Denise Choi Unopened 13:27 | Today

No more past activities to load.

To Do List

Type here to search

On-Screen Keyboard

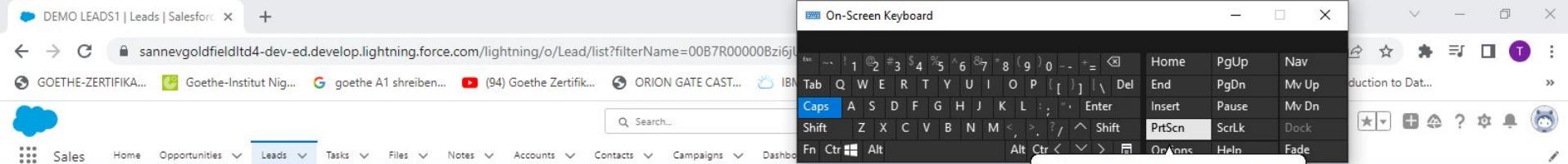
Home PgUp Nav End PgDn Mv Up Insert Pause Mv Dn PrtScn ScrLk Dock Options Help Fade

20°C Stark bewölkt 1:50 PM 7/3/2023

Part B Task 4: Mark Leads as Hot



Insert a 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.



	Name	Lead Status	Rating ↑	Title	Company	Mobile	Email
1	Chidi Seydou	Open - Not Contacted		Social Media Intern	Attitude Talent Agency	(851) 923-3824	chidiseydou415@attitude.com
2	Manisha Visvanathan	Open - Not Contacted		Senior Growth Marketing Manager	Growlers and Stuff Craft Brewery	(326) 598-4003	manishavis@growlers.com
3	Lawrence Ramirez	Open - Not Contacted		Digital Marketing Manager	Collection Consulting Group	(346) 269-7771	lawrence@collectionconsulting.com
4	Kiran Stefcia	Open - Not Contacted		Director of Marketing	Kiran and Co Marketers	(347) 810-3329	kiranstefcia@marketersco.com
5	Jay Farley	Open - Not Contacted		Content Marketing Manager	Random Wishes Builders	(735) 716-5095	jayfarley1985@wishes.com
6	Danika Marcia	Open - Not Contacted		Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	danika@tedstoys.com
7	Denise Choi	Open - Not Contacted	Hot	Director of Marketing Operations	Yaloo Search	(824) 617-6033	dchoi@yaloooyos.com
8	Martha Newman	Open - Not Contacted	Hot	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org
9	Thandiwe Bandi	Open - Not Contacted	Warm	Social Media Marketer	Jazz Mystics Music Group	(441) 709-5905	tbandi@jazzmystics.com
10	Janet Steinberg	Open - Not Contacted	Warm	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com

To Do List



Type here to search



20°C Stark bewölkt
7/3/2023

2:00 PM

Part B Task 5: Create Email Templates



Screenshot of a Salesforce Lightning interface showing the creation of an Email Template named "Follow-up email".

The top navigation bar shows several tabs and links, including "Coursera | Online Cours", "Project Instructions | Co", "Coursera - Lead Manag", "Copy of Independent P", and "On-Screen Keyboard". Below the navigation is a toolbar with various icons for Sales, Home, Opportunities, Leads, Tasks, Notes, Accounts, Contacts, Campaigns, and Dashbo.

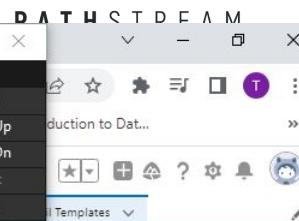
The main content area displays the "Email Template" page for "Follow-up email". It includes sections for "Details" (with tabs for "Information", "Related Entity Type", and "Folder"), "Message Content" (with fields for "Subject", "HTML Value", and "Enhanced Letterhead"), and "Additional Information".

In the top right corner of the browser window, there is a floating "On-Screen Keyboard" overlay.

The bottom of the screen shows the standard Salesforce footer with links for "Edit", "Clone", and "Delete".



Part B Task 5: Screenshot



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboard

Email Template Follow-up email

Edit Clone Delete

Details Related

Information

Email Template Name	Related Entity Type
Follow-up email	
Description	
Made in Email Template Builder	

Message Content

Subject	Enhanced Letterhead
Follow-up on previous Call	
HTML Value	
Hello {{Recipient.FirstName}}	

We would like to do a follow up on our last call to find out if you have made a decision concerning the product we advertised.

Additional Information

Created By	Last Modified By
Taofik Sanni 03.07.2023, 18:19	Taofik Sanni 03.07.2023, 18:19



Part B Task 6: Convert Leads

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

Step 1: Screenshot Thandiwe Bandi'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 Denise Choi.

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



Part B Task 6: Step 1 screenshot

Screenshot of a Salesforce Lead Management interface showing a lead record for "Thandiwe Bandi".

The lead details are:

- Title: Social Media Marketer
- Company: Jazz Mystics Music Group
- Phone: (2)
- Email: tbandi@jazzmystics.com

The status bar at the bottom shows activity filters: All time, All activities, All types. Buttons for Refresh, Expand All, and View All are also present.

The lead status is currently "Closed - Not Converted". A button to "Mark Status as Complete" is visible.

The "Activity" section shows:

- New Task
- Log a Call
- New Event
- Email

The "Upcoming & Overdue" section lists:

- THANDI FOLLOW UP (Task due 11.11)
- Call (Logged a call on Today)
- PRODUCT INTRODUCTION (Email sent to Thandiwe Bandi on 13:21 | Today)

The "Related" section indicates no potential duplicates and displays campaign history:

Campaign History (1)

Social Media Conference Email Campaign

Start Date:	24.07.2019
Type:	Email
Status:	Responded

[View All](#)



On-Screen Keyboard

← → ⌘ sannevgoldfieldtd4-dev-ed.develop.lightning.force.com/lightning/r/Lead/00Q7R00001nofBzUAI/view

GOETHE-ZERTIFIKAT... Goethe-Institut Nig... gothe A1 schreiben... (94) Goethe Zertifikat... ORION GATE CAST... IBM

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboard

Lead Janet Steinberg

Title Social Media Marketing Manager Company Costumez Warehouse Phone (2) Email janet.steinberg@costumez.com

Closed - Not Converted Converted Mark Status as Complete

Activity Details Chatter News

New Task Log a Call New Event Email

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

Upcoming & Overdue

MEETING WITH JANET You have an upcoming event

July • 2023 This Month

Call You logged a call

FIXING OF APPOINTMENT You sent an email to Janet Steinberg

Unopened 13:15 | Today

Related

We found no potential duplicates of this Lead.

Campaign History (1)

Social Media Conference Email Campaign

Start Date:	24.07.2019
Type:	Email
Status:	Responded

[View All](#)



P A T H S T R E A M

Part B Task 6: Step 3 screenshot

Screenshot of a Salesforce Lead Management interface showing the conversion of a lead.

The browser tabs include:

- Coursera | Online Courses & ...
- Project Instructions | Coursera
- Lead Management in Salesforce
- New Tab

The URL is <https://sannevgoldfieldt4-dev-ed.lightning.force.com/lightning/r/Lead/00Q7R00001nofC1UAI/view>.

The On-Screen Keyboard window is open, showing the PrtScn key highlighted.

The Salesforce Lead record for "Martha Newman" is displayed:

- Title: Social Media Marketing Manager
- Company: FoodStars.Org
- Phone: (323) 784-7927

The Activity tab is selected, showing:

- Open - Not Contacted
- Upcoming & Overdue tasks
- Events: MEETING WITH MARTHA'S COMPANY (July 2023)
- Call: Call (July 2023)

A message indicates: "Your lead has been converted".

The converted lead information is shown in three cards:

- ACCOUNT**: FoodStars.Org (Type: Social Media Marketing Manager, Account Name: FoodStars.Org, Phone: (323) 784-7927, Website: [FoodStars.Org](#), Account Owner: Taofik Sanni, Account Site: [FoodStars.Org](#))
- CONTACT**: Martha Newman (Title: Social Media Marketing Manager, Account Name: FoodStars.Org, Phone: (323) 784-7927, Email: martha.newman@foodst... Mobile: (323) 784-7927)
- OPPORTUNITY**: FoodStars.Org (Account Name: FoodStars.Org, Close Date: 30.09.2023, Amount: , Opportunity Owner: Taofik Sanni)

The right sidebar shows the History (1) section, which includes:

- 24.07.2019: Response Email Campaign (Email Responded)

Buttons at the bottom right include: New Task, Go to Leads, Today, View All.



P A T H S T R E A M

Part B Task 6: Step 4 screenshot

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboard

Lead Denise Choi

Title Director of Marketing Operations Company Yaloo Search Phone (2)

Open - Not Contacted

Activity Details Chatter News

New Task Log a Call New Event

Upcoming & Overdue

description of product for denise company

You have an upcoming task

July • 2023

MEETING WITH DENISE COMPANY

You had an event

Call

On-Screen Keyboard

Your lead has been converted

ACCOUNT

Yaloo Search

Type: Phone: Website: Account Owner: Taofik Sanni Account Site:

CONTACT

Denise Choi

Title: Director of Marketing Op... Account Name: Yaloo Search Phone: Email: dchoi@yaloooyos.com Mobile: (824) 617-6033

OPPORTUNITY

Yaloo Search-

Account Name: Yaloo Search Close Date: 30.09.2023 Amount: Opportunity Owner: Taofik Sanni

History (1)

Launch Email Campaign 24.07.2019 Email Responded

New Task Go to Leads View All

Follow New Case Submit for Approval Clone

Select Converted Status

converted

potential duplicates of this Lead.

You have reached the end of Part B!



This is the end of this Independent Project! Great job completing all these tasks in Salesforce. Make sure you download a copy for your portfolio.