



# Opportunity Management in Salesforce

Independent Project: Use Salesforce to Close Sales Deals

*Taofik Bankole Sanni*



## Part A Overview

- 
- 1 **Task 1:** Update FoodStars.org Opportunity Record
  - 2 **Task 2:** Update Yaloo Search Opportunity Record
  - 3 **Task 3:** Use Opportunity Kanban
  - 4 **Task 4:** Perform a Business Case Analysis

## Part A, Task 1:

# Update FoodStars.Org Opportunity Record



P A T H S T R E A M

***Insert screenshots for each of these steps on the following slides to show the updates to the FoodStars.org opportunity record.***

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

**Step 1:** Past activities showing the call logged with Martha

**Step 2:** Contact roles section showing Jessie Patel has been added

**Step 3:** Notes section showing you added a note about licenses

**Step 4:** Past activities showing the event created to meet with Jessie

**Step 5:** Past activities showing the task created to confirm budget

**Step 6:** Sales path showing the opportunity is now in the “Value Proposition” stage

## Part A, Task 1:

# Update FoodStars.Org Opportunity Record



## PATH STREAM

The screenshot shows a Salesforce Lightning interface for an opportunity named "FoodStars.Org". The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. A search bar is at the top center. A floating On-Screen Keyboard is visible in the top right corner. The main content area has a blue header with stages: Prospecting, Qualification, Needs Analysis, Value Proposition, Id. Decision Makers, Perception Analysis, Proposal/Price Qu..., Negotiation/Review, and Closed. A "Mark Stage as Complete" button is in the top right of the header. Below the header is a toolbar with buttons for New Task, Log a Call, New Event, and Email. A "Related" sidebar on the right lists Products (0), Notes (0), Notes & Attachments (0), and Contact Roles (1). The main body shows activity sections for Upcoming & Overdue, August 2023, and This Month. The August section shows a call log entry: "You logged a call". The This Month section shows a message: "No more past activities to load." A "Filters" dropdown and "Refresh" link are also present.

## Part A, Task 1:

# Update FoodStars.Org Opportunity Record



P A T H S T R E A M

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

Opportunity FoodStars.Org

+ Follow New Case Clone Submit for Approval

Upcoming & Overdue

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

August - 2023

Call  
You logged a call

No more past activities to load.

This Month Today

Products (0)

Notes (0)

Notes & Attachments (0)

Upload Files  
Or drop files

Contact Roles (2)

Martha Newman PRIMARY

Role: Title: Social Media Marketing Manager

Jessie Patel

Role: Title: Decision Maker digital marketing manager

To Do List

On-Screen Keyboard

Coursera | Online Courses & Cre... Project Instructions | Coursera Hands-On Orgs FoodStars.org

sannevgoldfieldltd5-dev-ed.develop.lightning.force.com/lightning/r/Opportunity/00606000018YfQ0AAK/view

GOETHE-ZERTIFIKAT... Goethe-Institut Nig... Split PDF goethe A1 schreiben... (94) Goethe Zertifikat... ORION GATE C...

Introduction to Data...

18°C Windig 2:09 PM 8/7/2023

## Part A, Task 1:

# Update FoodStars.Org Opportunity Record



P A T H S T R E A M

Screenshot of a Salesforce Lightning interface showing an opportunity record for "FoodStars.Org".

The top navigation bar includes links to Coursera, Project Instructions, Hands-On Orgs, and the current FoodStars.Org record. A floating On-Screen Keyboard is visible in the top right corner.

The main page header shows the opportunity name "FoodStars.Org" and a blue "Follow" button. Below the header, there are sections for "Upcoming & Overdue" activities (none shown), "August - 2023" tasks (one call log entry), and "Products (0)", "Notes (1)", and "Notes & Attachments (0)" panels.

The "Notes" panel contains a single note from "Audrey Sanni" dated 07/08/2023 at 14:27, requesting two separate simplysocial licenses for two contacts.

The "Notes & Attachments" panel has a "Upload Files" button.

## Part A, Task 1:

# Update FoodStars.Org Opportunity Record



PATHSTREAM

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

Opportunity FoodStars.Org

Account Name FoodStars.Org Close Date 30/09/2023 Amount Opportunity Owner Audrey Sanni

+ Follow New Case Clone Submit for Approval

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

New Task Log a Call New Event Email

Upcoming & Overdue

MEETING WITH JESSE You have an upcoming event with Jessie Patel 10:00 | 25 Nov

August - 2023 This Month

Call You logged a call Today

To Do List

On-Screen Keyboard

Introduction to Data...

18°C Windy 4:58 PM

FoodStars.Org

Products (0)

Notes (1)

licenses 07/08/2023, 14:27 by Audrey Sanni A request has been made for the two contacts at FoodStars.org to have two separate simplysocial licenses

View All

# Part A Task 1:

# Update FoodStars.Org Opportunity Record



## PATH STREAM

The screenshot shows a Salesforce Opportunity page for 'FoodStars.Org'. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. A search bar is also present. A floating On-Screen Keyboard is visible at the top right. The main content area displays the opportunity details: Account Name (FoodStars.Org), Close Date (30/09/2023), Amount, and Opportunity Owner (Audrey Sanni). Below this, a progress bar indicates the sales process stages: Prospecting, Qualification, Needs Analysis, Value Proposition, Id. Decision Makers, Perception Analysis, Proposal/Price Qu..., Negotiation/Review, and Closed. A button to 'Mark Stage as Complete' is shown. The 'Activity' tab is selected, showing sections for Upcoming & Overdue tasks, events, and calls. The 'Related' section lists 'Products (0)' and 'Notes (1)'. A 'View All' link is at the bottom right of the notes section.

## Part A, Task 1:

# Update FoodStars.Org Opportunity Record



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

Opportunity FoodStars.Org

Account Name FoodStars.Org Close Date 30/09/2023 Amount Opportunity Owner Audrey Sanni

Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Qu... Negotiation/Review Closed

New Task Log a Call New Event Email

Activity Details Chatter

Upcoming & Overdue

- MEETING WITH JESSE You have an upcoming event with Jessie Patel 10:00 | 25 Nov
- BUDGET REMINDER You have an upcoming task with Martha Newman Tomorrow

View More

Related

Products (0)

Notes (1)

licenses 07/08/2023, 14:27 by Audrey Sanni A request has been made for the two contacts at FoodStars.org to have two separate simplysocial licenses

Type here to search 18°C Windig 5:06 PM 8/7/2023

On-Screen Keyboard

Esc	~	! 1	@ 2	# 3	\$ 4	% 5	^ 6	& 7	~ 8	( 9 ) 0	- + =	Backspace	Home	PgUp	Nav
Tab	Q	W	E	R	T	Y	U	I	O	P	[ ] \	Del	End	PgDn	Mv Up
Caps	A	S	D	F	G	H	J	K	L	:	Enter	Insert	Shift	Mv Dn	Pause
Shift	Z	X	C	V	B	N	M	,	>	?	^	Fn Ctr Alt	Alt Ctr	Dock	
Fn	Ctrl	Alt										Options	PrtScn	ScrLk	Fade

## Part A, Task 2:

# Update Yaloo Search Opportunity Record



***Insert screenshots for each of these steps on the following slides to show the updates to the Yaloo Search opportunity record.***

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

**Step 1:** Past activities showing the call logged with Denise

**Step 2:** Notes section showing you added a note about licenses

**Step 3:** Details tab showing you updated the opportunity amount

**Step 4:** Contact roles section showing Kenny and Wonhee have been added

**Step 5:** Past activities showing the event created for the demo

**Step 6:** Sales path showing the opportunity is now in the “Needs Analysis” Stage

## Part A, Task 2:

# Update Yaloo Search Opportunity Record



PATHSTREAM

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

Opportunity Yaloo Search-

Account Name Yaloo Search Close Date 30/09/2023 Amount Opportunity Owner Audrey Sanni

+ Follow New Case Clone Submit for Approval

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

Activity Details Chatter

New Task Log a Call New Event Email

Upcoming & Overdue

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

August - 2023

Call You logged a call

This Month Today

Related

Products (0)

Notes (0)

Notes & Attachments (0)

Upload Files Or drop files

Type here to search

18°C Windig 5:10 PM 8/7/2023

On-Screen Keyboard

## Part A, Task 2:

# Update Yaloo Search Opportunity Record



P A T H S T R E A M

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

Opportunity Yaloo Search-

Account Name Yaloo Search Close Date 30/09/2023 Amount Opportunity Owner Audrey Sanni

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

New Task Log a Call New Event Email

Activity Details Chatter

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

August - 2023 This Month Today

Call You logged a call

To Do List

On-Screen Keyboard

Tab Caps Shift Fn PgUp Insert PrtScn Options PgDn Pause ScrLk Help Nav Mv Up Mv Dn Dock Fade

Related Products (0)

Notes (1)

LICENSES 07/08/2023, 17:13 by Audrey Sanni Yaloo search will need a total of ten licenses for 10 different users

Type here to search 18°C Windig 5:13 PM 8/7/2023

## Part A, Task 2:

# Update Yaloo Search Opportunity Record



P A T H S T R E A M

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

Opportunity Yaloo Search-

Account Name Yaloo Search Close Date 30/09/2023 Amount 10.000,00 € Opportunity Owner Audrey Sanni

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

Activity Details Chatter

Opportunity Owner	Audrey Sanni	Amount	10.000,00 €
Private		Expected Revenue	1.000,00 €
Opportunity Name	Yaloo Search-	Close Date	30/09/2023
Account Name	Yaloo Search	Next Step	
Type		Stage	Prospecting
Lead Source		Probability (%)	10%

Related

Products (0)

Notes (1)

LICENSES  
07/08/2023, 17:13 by Audrey Sanni  
Yaloo search will need a total of ten licenses for 10 different users

View All

To Do List



## Part A, Task 2:

# Update Yaloo Search Opportunity Record



PATHSTREAM

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

Opportunity Yaloo Search -

August 2022

You logged a call

No more past activities to load.

THIS MONTH

Today

+ Follow New Case Clone Submit for Approval

View All

Notes & Attachments (0)

Upload Files

Or drop files

Contact Roles (3)

Denise Choi	PRIMARY
Role:	Director of Marketing Operations
Title:	
Wonhee Kim	
Role:	Evaluator
Title:	Social Media Marketer
Kenny Lopez	
Role:	Influencer

To Do List

Type here to search

19°C Windig 5:25 PM 8/7/2023

The screenshot shows a Salesforce Lightning interface for an opportunity record titled "Yaloo Search". The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. An "On-Screen Keyboard" is overlaid on the screen. The main content area displays activity history (a recent call), a note section (empty), and contact roles (Denise Choi, Wonhee Kim, Kenny Lopez). The bottom navigation bar includes a "To Do List" and a search bar. The system status bar at the bottom right shows the date and time (8/7/2023, 5:25 PM), temperature (19°C), and location (Windig).

## Part A, Task 2:

# Update Yaloo Search Opportunity Record



PATHSTREAM

Screenshot of a Salesforce Lightning interface showing an Opportunity record for "Yaloo Search".

The top navigation bar includes links to Coursera, Hands-On Orgs, Yaloo Search - Opportunity, Project In, and On-Screen Keyboard.

The main header shows the Opportunity name: "Yaloo Search".

The left sidebar menu includes Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More.

The Activity tab is selected, displaying the following sections:

- Upcoming & Overdue:** Shows a Software Demo event for Wonhee Kim at 13:00 on 30 Nov.
- August - 2023:** Shows a Call activity where the user logged a call.

No more past activities to load.

The Related section lists:

- Products (0)**
- Notes (1)**

LICENSES  
07/08/2023, 17:13 by Audrey Sanni  
Yaloo search will need a total of ten licenses for 10 different users

[View All](#)
- Notes & Attachments (0)**

[Upload Files](#)  
Or drop files

The bottom navigation bar includes To Do List, a search bar, and system status icons: 19°C Windig, 5:43 PM, 8/7/2023.

## Part A, Task 2:

# Update Yaloo Search Opportunity Record



P A T H S T R E A M

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

Opportunity Yaloo Search-

Account Name Yaloo Search Close Date 30/09/2023 Amount 10.000,00 € Opportunity Owner Audrey Sanni

Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Qu... Negotiation/Review Closed

New Task Log a Call New Event Email

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

Upcoming & Overdue

Software Demo You have an upcoming event with Wonhee Kim 13:00 | 30 Nov

August - 2023 This Month

Call You loaded a call

To Do List

On-Screen Keyboard

PATHSTREAM

Introduction to Data...

LICENSES 07/08/2023, 17:13 by Audrey Sanni Yaloo search will need a total of ten licenses for 10 different users

View All

## Part A, Task 3: Use Opportunity Kanban



*Insert a screenshot showing the updated opportunity Kanban board on the following slide. Make sure it displays which opportunity stages both the FoodStars.org and Yaloo Search opportunities are in as well as the estimated amounts attached to both.*



# Part A, Task 3: Use Opportunity Kanban

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

Recently Viewed ▾

Opportunities Recently Viewed ▾

Prospecting (0) Qualification (0) Needs Analysis (1) Value Proposition (1) Id. Decision Ma... (0) Perception Anal... (0) Proposal/Price ... (0) Negotiation/Re... (0)

10,000 € 700 €

Yaloo Search-  
Yaloo Search  
Needs Analysis

FoodStars.Org-  
FoodStars.Org  
Value Proposition

On-Screen Keyboard

Coursera | Online Courses & Cre... Hands-On Orgs Recently Viewed | Opportunities Project In... On-Screen Keyboard

sannevgoldfieldltd5-dev-ed.develop.lightning.force.com/lightning/o/Opportunity/list?filterName=Recent

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19°C Windig 5:47 PM 8/7/2023

## Part A, Task 4: Business Case Analysis

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*In a short paragraph, describe how updating opportunity records, progressing opportunities through stages, and using opportunity Kanban in Salesforce would help SimplySocial's team of account executives sell better and more efficiently. In your description, include:*

- The overall purpose of opportunity records, opportunity stages, and opportunity Kanban
- The steps you took to help the AE organize and progress opportunities through the stages.
- How a company like SimplySocial would benefit from using opportunities and opportunity stages

## Part A, Task 4: Business Case Analysis



Opportunity records are used to track and manage potential sales deals, providing a centralized view of customer interactions and potential revenue. Opportunity stages define the progression of a deal through various sales milestones, while the Opportunity Kanban offers a visual representation to help sales teams easily monitor and advance opportunities through these stages. The steps taken to help the AE to progress through the opportunity stages involve the logging of calls, creation and making of notes as required, creation of task as well as events. Further details were added as appropriate including the addition of contact and the opportunity was moved to the appropriate stage. Using opportunities and opportunity stages in Salesforce can enable a company like simplysocial to effectively track and manage their sales pipeline, providing clear visibility into potential revenue streams and allowing for strategic decision-making. This structured approach improves forecasting accuracy, streamlines sales processes, and enhances collaboration among teams, ultimately driving increased efficiency and revenue growth.

# 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:** Create Products
  - 2 **Task 2:** Create Standard Price Books
  - 3 **Task 3:** Create Custom Price Books
  - 4 **Task 4:** Associate Price Books With Opportunities
  - 5 **Task 5:** Create Quotes
  - 6 **Task 6:** Send Quotes
  - 7 **Task 7:** Close the Deal
  - 8 **Task 8:** Create Contracts

## Part B, Task 1: Create Products

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P A T H S T R E A M

*Insert screenshots for each of the new products you create. Make sure that you screenshot the product record page showing the name of the product as well as all the product details according to the specifications in the instructions.*

- Step 1: Product record page for the single license subscription product
- Step 2: Product record page for the subscription package product
- Step 3: Product record page for the subscription package plus product
- Step 4: Product record page for the extra user license product

# Part B, Task 1: Create Products



P A T H S T R E A M

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

Product Single License Subscription

New Contact New Opportunity New Case

Product Code Product Family  
Small-Sized Company Offering

Related Details

Product Name Active  
Single License Subscription

Product Code Product Family  
Small-Sized Company Offering

Created By Last Modified By  
 Audrey Sanni, 07/08/2023, 22:14 Audrey Sanni, 07/08/2023, 22:14

Product Description  
1 user, 5 social media profiles

To Do List

Type here to search

15°C Windig 10:14 PM 8/7/2023

On-Screen Keyboard

Home	PgUp	Nav
End	PgDn	Mv Up
Insert	Pause	Mv Dn
Shift	PrScn	ScrLk
Fn Ctr Alt	Alt Ctr < >	Dock
Options	Help	Fade

# Part B, Task 1: Create Products



P A T H S T R E A M

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

Product **Subscription Package** New Contact New Opportunity New Case

Product Code Product Family  
Medium-Sized Company Offering

Related Details

Product Name	Active
Subscription Package	<input type="checkbox"/>
Product Code	Product Family
Medium-Sized Company Offering	
Created By	Last Modified By
Audrey Sanni, 07/08/2023, 22:16	Audrey Sanni, 07/08/2023, 22:16
Product Description	
4 users, 8 social media profiles	

To Do List

15°C Windig 10:16 PM 8/7/2023

On-Screen Keyboard



# Part B, Task 1: Create Products

A screenshot of a web browser window showing a Salesforce product record for "Subscription Package Plus". The browser has multiple tabs open, including Coursera, Project Instructions, Hands-On Orgs, and Subscription Package Plus. An "On-Screen Keyboard" is displayed as a modal over the page, with a tooltip saying "Move the cursor to where you want to enter text." The Salesforce interface shows standard navigation bars and buttons like "New Contact", "New Opportunity", and "New Case". The product details include Product Name (Subscription Package Plus), Active status (checked), and Product Family (Large-Sized Company Offering). The record was created by Audrey Sanni on 07/08/2023 at 22:18. The product description is listed as "8 users, 10 social media profiles". At the bottom, there's a "To Do List" and a Windows taskbar showing the date and time (10:18 PM, 8/7/2023) and system icons.

# Part B, Task 1: Create Products



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

Product Extra User License

Product Code Product Family  
Large-Sized Company Offering

Related Details

Product Name Active  
Extra User License  
Product Code  
Large-Sized Company Offering

Created By Last Modified By  
 Audrey Sanni, 07/08/2023, 22:20

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

To Do List

Type here to search

15°C Windig 10:20 PM 8/7/2023

On-Screen Keyboard

Search...

1 2 3 4 5 6 7 8 9 0 . = Tab Caps Shift Fn Ctr Alt Home PgUp Nav End PgDn MvUp Insert Pause MvDn PrtScn ScrLk Dock Options Help Fade

Coursera | Online Cours X Project Instructions | Co X Hands-On Orgs X Extra User License | Sale X G On-Screen Keyboard X

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Introduction to Dat...

## Part B, Task 2: Create Standard Price Books



*Insert screenshots showing the standard price book entry, or list price, you've added for each of the products you created. Make sure your screenshot shows the name of the product as well as the standard price book and list price entry.*

**Step 1:** Standard price book for the single license subscription product

**Step 2:** Standard price book for the subscription package product

**Step 3:** Standard price book for the subscription package plus product

**Step 4:** Standard price book for the extra user license product

## **Part B, Task 2: Create Standard Price Books**



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

## Product Single License Subscription

New Contact New Opportunity New Case

Product Code Product Family  
Small-Sized Company Offering

**Related** Details

**Price Books (1)**

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	50,00 €	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Add to Price Book

View All

To Do List

Type here to search

15°C Windig

10:28 PM 8/7/2023

# Part B, Task 2: Create Standard Price Books



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

Product **Subscription Package** New Contact New Opportunity New Case

Product Code Product Family  
Medium-Sized Company Offering

**Related** Details

**Price Books (1)** Add to Price Book

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	200,00 €	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[View All](#)

On-Screen Keyboard

Coursera | Online Cours X Project Instructions | Co X Hands-On Orgs X Subscription Package | X G On-Screen Keyboard X

sannevgoldfieldltd5-dev-ed.develop.lightning.force.com/lightning/r/Product2/01t0600000DVpm1AAD/view

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

Cloud icon

Type here to search

15°C Windig 10:29 PM 8/7/2023

# Part B, Task 2: Create Standard Price Books



P A T H S T R E A M

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

Product **Subscription Package Plus**

New Contact New Opportunity New Case

Related Details

**Price Books (1)**

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	400,00 €	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Add to Price Book

View All

To Do List

Type here to search

15°C Windig

10:30 PM 8/7/2023

On-Screen Keyboard

Esc	~	! 1	@ 2	# 3	% 4	& 5	^ 6	* 7	8 8	( 9 ) 0	- -	= =	⌫		
Tab	q	w	e	r	y	u	i	o	p	[ ] [ ]	\ \	Del	Home	PgUp	Nav
Caps	a	s	d	f	g	h	j	k	l	:	" "	Enter	End	PgDn	Mv Up
Shift	z	x	c	v	b	n	m	,	>	?	^ ^	Shift	Insert	Pause	Mv Dn
Fn	Ctr	Alt							Alt	Ctr	< >	Esc	PrtScn	ScrLk	Dock
													Options	Help	Fade



# Part B, Task 2: Create Standard Price Books

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

Product Extra User License

Product Code Product Family

Large-Sized Company Offering

Related Details

Price Books (1) Add to Price Book

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	35,00 €	<input type="checkbox"/>	<input checked="" type="checkbox"/>

View All

To Do List

Type here to search

15°C Windig 10:31 PM 8/7/2023

On-Screen Keyboard

1 2 3 4 5 6 7 8 9 0 - = Home PgUp Nav Tab q w e r t y u i o p [ ] \ Del End PgDn Mv Up Caps a s d f g h j k l ; . Enter Insert Pause Mv Dn Shift z x c v b n m < , > ? ^ Shift PrtScn ScrLk Dock Options Help Fade Fn Ctr Alt Alt Ctr < > Esc

## Part B, Task 3: Create Custom Price Books

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P A T H S T R E A M

*Insert screenshots related to the custom price books you create, according to the following instructions:*

**Step 1:** The new price book for **nonprofit customers** you just created

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

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

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

# Part B, Task 3: Create Custom Price Books



P A T H S T R E A M

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

Price Book Nonprofit

Edit Clone Delete

Related Details

Price Book Name  
Nonprofit

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

Created By  
 Audrey Sanni, 07/08/2023, 22:37

Active

Is Standard Price Book

Last Modified By  
 Audrey Sanni, 07/08/2023, 22:37

To Do List

Type here to search

15°C Windig

10:38 PM 8/7/2023

On-Screen Keyboard

PrScn

# Part B, Task 3: Create Custom Price Books



P A T H S T R E A M

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

Price Book Enterprise

Edit Clone Delete

Related Details

Price Book Name  
Enterprise

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

Created By  
 Audrey Sanni, 07/08/2023, 22:39

Active

Is Standard Price Book

Last Modified By  
 Audrey Sanni, 07/08/2023, 22:39

To Do List

Type here to search

15°C Windig

10:39 PM 8/7/2023

On-Screen Keyboard

PrScn

# Part B, Task 3: Create Custom Price Books



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

Search... On-Screen Keyboard

Price Book Enterprise

Edit Clone Delete

**Related** Details

**Price Book Entries (4)**

Product Name	Product Code	List Price	Active
Extra User License	Large-Sized Company Offering	35,00 €	<input checked="" type="checkbox"/>
Single License Subscription	Small-Sized Company Offering	50,00 €	<input checked="" type="checkbox"/>
Subscription Package	Medium-Sized Company Offering	200,00 €	<input checked="" type="checkbox"/>
Subscription Package Plus	Large-Sized Company Offering	400,00 €	<input checked="" type="checkbox"/>

Add Products

**View All**

**Price Book History (1)**

Date	Field	User	Original Value	New Value
07/08/2023, 22:39	Created.	Audrey Sanni		

**View All**

To Do List



Type here to search

10:46 PM  
8/7/2023

Morgen Pollenflug

# Part B, Task 3: Create Custom Price Books



P A T H S T R E A M

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

Price Book Nonprofit Edit Clone Delete

Related Details

Price Book Entries (4)

Product Name	Product Code	List Price	Active
Extra User License	Large-Sized Company Offering	28,00 €	<input checked="" type="checkbox"/>
Single License Subscription	Small-Sized Company Offering	40,00 €	<input checked="" type="checkbox"/>
Subscription Package	Medium-Sized Company Offering	160,00 €	<input checked="" type="checkbox"/>
Subscription Package Plus	Large-Sized Company Offering	320,00 €	<input checked="" type="checkbox"/>

Add Products

View All

Price Book History (1)

Date	Field	User	Original Value	New Value
07/08/2023, 22:37	Created.	Audrey Sanni		

View All

To Do List

## Part B, Task 4:

# Associate Price Books With Opportunities



*Insert screenshots of your two in-progress opportunities showing the correct price books and products added to the products section of the opportunity record page. For each screenshot, make sure the opportunity name is visible, along with the associated products and the correct prices, according to the following instructions:*

Step 1: FoodStars.Org opportunity record showing products/prices

Step 2: Yaloo Search opportunity record showing products/prices

## Part B, Task 4:

# Associate Price Books With Opportunities



P A T H S T R E A M

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

Opportunity FoodStars.Org-  
Account Name FoodStars.Org Close Date 30/09/2023 Amount 68,00 € Opportunity Owner Audrey Sanni

Follow New Case Clone Submit for Approval

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

New Task Log a Call New Event Email

Activity Details Chatter

Upcoming & Overdue

MEETING WITH JESSE You have an upcoming event with Jessie Patel 10:00 | 25 Nov

BUDGET REMINDER You have an upcoming task with Martha Newman Today

View More

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

Related Products (2)

Single License Subscription  
Quantity: 1.00 Sales Price: 40,00 € Date:

Extra User License  
Quantity: 1.00 Sales Price: 28,00 € Date:

View All

To Do List

Type here to search

12°C Stark bewölkt

7:05 AM 8/8/2023

## Part B, Task 4:

# Associate Price Books With Opportunities



P A T H S T R E A M

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

Opportunity Yaloo Search-

Account Name Yaloo Search Close Date 30/09/2023 Amount 435,00 € Opportunity Owner Audrey Sanni

Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Qu... Negotiation/Review Closed

New Task Log a Call New Event Email

Upcoming & Overdue SOFTWARE DEMO You have an upcoming event with Wonhee Kim 13:00 | 30 Nov

August - 2023 This Month Yesterday

To Do List

On-Screen Keyboard

PrScn

Introduction to Dat...

Subscription Package Plus

Quantity: 1.00 Sales Price: 400,00 € Date:

Extra User License

Quantity: 1.00 Sales Price: 35,00 € Date:

View All

6:56 AM

## Part B, Task 5: Create Quotes

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*On the following slide, insert a screenshot of the Initial Quote record page for the Yaloo Search opportunity that you just made. Make sure your screenshot shows the name of the quote, the name of the account and opportunity, the quote line items, the grand total, and the updated quote status.*

# Part B, Task 5: Create Quotes



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

Opportunity Yaloo Search-

On-Screen Keyboard

Expected Revenue: 2.000,00 €  
Close Date: 30/09/2023  
Last Modified By: Audrey Sanni  
Last Modified: 07/08/2023, 17:44

Stage: Prospecting  
Amount: 10.000,00 €  
Probability (%): 10%  
Expected Revenue: 1.000,00 €  
Close Date: 30/09/2023  
Last Modified By: Audrey Sanni  
Last Modified: 07/08/2023, 17:16

View All

Quotes (1)

00000001  
Quote Name: Initial Quote  
Syncing:   
Expiration Date: 31/08/2023

View All



## Part B, Task 6: Send Quotes

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*Insert screenshots related to the quote you generated on the following slides.*

**Step 1:** The PDF preview of the initial quote

**Step 2:** The draft email containing the PDF of the initial quote that you will send to Denise.

- *Make sure that the PDF attachment is visible in the email.*

# Part B, Task 6: Send Quotes



On-Screen Keyboard

PDF Preview

quoteTemplateDataViewer.apexp

1 / 1 | - 100% + | 🔍

sannev goldfield Ltd

Company Address DE

Created Date 08/08/2023  
Expiration Date 31/08/2023  
Quote Number 00000001

Prepared By Audrey Sanni  
Email audreysanni@gmail.com

Contact Name Denise Choi  
Email dchoi@yaloooyos.com

Bill To Name Yaloo Search  
Bill To 19461 Greenview Ave  
New York 10174  
United States

Ship To Name Yaloo Search  
Ship To 19461 Greenview Ave  
New York 10174  
United States

Product	List Price	Sales Price	Quantity	Total Price
Extra User License	35,00 €	35,00 €	1,00	35,00 €
Subscription Package Plus	400,00 €	400,00 €	1,00	400,00 €

Save and Email Quote Save to Quote Cancel

The screenshot shows a Salesforce quote template viewer. The quote is for 'sannev goldfield Ltd' with a quote number of 00000001. It's prepared by Audrey Sanni and addressed to Yaloo Search at 19461 Greenview Ave, New York 10174. The quote includes two items: 'Extra User License' and 'Subscription Package Plus', both listed at 35,00 € and 400,00 € respectively. The total price is 435,00 €. The interface includes a sidebar with product categories like 'Products', 'Subscriptions', and 'Extras'. A floating keyboard is visible above the quote preview. The bottom navigation bar includes links for 'To Do List', 'Search', and system icons.

# Part B, Task 6: Send Quotes



P A T H S T R E A M

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

New Contact New Opportunity New Case

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.

August - 2023 This Month

QUOTES 11:32 | Today You sent an email to dchoi@yaloooyos.com

No more past activities to load.

Initial Quote\_V1.pdf 8 Aug 2023 • 76KB • pdf

View All

Upload Files

Initial Quote\_V1

Initial Quote\_V1.pdf 8 Aug 2023 • 76KB • pdf

View All

On-Screen Keyboard

Esc	~	! 1	@ 2	# 3	% 4	^ 5	& 6	* 7	( 8	) 9	= +	Backspace	Home	PgUp	Nav
Tab	q w e r t y u i o p [ ] \	Del	End	PgDn	Mv Up	Mv Dn									
Caps	a s d f g h j k l ; , .	Enter	Insert	Pause	PrtScn	ScrLk	Dock								
Shift	z x c v b n m , > ? /	Shift	Alt Ctr < >	Shift	Options	Help	Fade								
Fn	Ctr Alt	Fn	Fn	Fn	Fn	Fn	Fn								

javascript:void(0);

Type here to search



18°C Windig

11:35 AM  
8/8/2023

## Part B, Task 7: Close the Deal

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**Insert screenshots on the following slides showing you've correctly closed the Yaloo Search and FoodStars.org opportunities.**

**Step 1: Close the Yaloo Search opportunity as won.**

- Make sure your screenshot shows the opportunity stage status updated accordingly.

**Step 2: Close the FoodStars.org opportunity as lost.**

- Make sure your screenshot show the opportunity stage updated accordingly and the note you created explaining why it was closed.

# Part B, Task 7: Close the Deal



P A T H S T R E A M

Salesforce screenshot showing an opportunity record for "Yaloo Search".

**Opportunity Details:**

- Account Name: Yaloo Search
- Close Date: 08/08/2023
- Amount: 435,00 €
- Opportunity Owner: Audrey Sanni

**Activity Timeline:** A green progress bar shows the deal's status from "New" to "Closed Won".

**Related Products:**

- Subscription Package Plus: Quantity: 1.00, Sales Price: 400,00 €
- Extra User License: Quantity: 1.00, Sales Price: 35,00 €



# Part B, Task 7: Close the Deal



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

Opportunity FoodStars.Org- Account Name FoodStars.Org Close Date 30/09/2023 Amount 68,00 € Opportunity Owner Audrey Sanni

Prospecting Qualification Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Qu... Negotiation/Review Closed Lost Change Closed Stage

Activity Details Chatter

New Task Log a Call New Event Email

Upcoming & Overdue

- MEETING WITH JESSE You have an upcoming event with Jessie Patel 10:00 | 25 Nov
- BUDGET REMINDER You have an upcoming task with Martha Newman Today

View More To Do List

On-Screen Keyboard

~	1	2	3	4	5	6	7	8	(9)	0	-	=	Del
Tab	q	w	e	r	t	y	u	i	o	p	[ ]	\	Home
Caps	a	s	d	f	g	h	j	k	l	:	Enter	End	
Shift	z	x	c	v	b	n	m	<	>	?/	Shift	Insert	
Fn	Ctrl	Alt										PrtScn	
												ScrLk	
												Pause	
												Mv Up	
												Mv Dn	
												Dock	
												Fade	
												Options	
												Help	

Products (2)

Single License Subscription	Quantity: 1.00	Sales Price: 40,00 €
Date:		
Extra User License	Quantity: 1.00	Sales Price: 28,00 €
Date:		

View All

18°C Windig 11:41 AM 8/8/2023

## Part B, Task 8: Create Contracts



P A T H S T R E A M

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

# Part B, Task 8: Create Contracts



P A T H S T R E A M

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

Contract  
**00000100**

Account Name Yahoo Search	Status Draft	Contract Start Date 09/08/2023	Contract End Date 08/08/2024	Contract Term (months) 12
------------------------------	-----------------	-----------------------------------	---------------------------------	------------------------------

New Contact New Opportunity New Case

Draft  Mark Status as Complete

Related Details

**Contract History (1)**

Date	Field	User	Original Value	New Value
08/08/2023, 11:50	Created.	Audrey Sanni		

[View All](#)

**Notes & Attachments (0)**

[Upload Files](#)

Or drop files

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

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

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

To Do List

Type here to search

18°C Windig

11:50 AM 8/8/2023

# 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 of this deck for your portfolio.*