

Opportunity Management in Salesforce

Independent Project: Use Salesforce to Close Sales Deals

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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

Software used: Trailhead playground and salesforce developer account

Part A, Task 1:

Update FoodStars.Org Opportunity Record

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

- *I ensured that the title of the opportunity in my screenshot is clearly visible.*

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 I 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

The screenshot shows a Salesforce Lightning interface for an Opportunity record. The URL in the browser is greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d0000AhMB0AAN/view.

Header: The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar.

Breadcrumbs: The breadcrumb trail shows the path: The American Dream Academy > Copy of Independent Project: Use > Hands-On Orgs > FoodStars.org | Salesforce.

Opportunity Details: The main content area displays the Opportunity record for "FoodStars.org". Key details include:

- Opportunity Name:** FoodStars.org
- Stage:** Prospecting
- Amount:** €0.00
- Probability (%):** 10%
- Expected Rev...:** (partially visible)
- Close Date:** 31/12/2022

Activity History: The "Upcoming & Overdue" section shows no activities. The "December • 2022" section shows a "First Contact Call" activity where a call was logged. The note states: "It went well, from all indications, there is a need for our product with FoodStars.org".

Related Sections: On the right side, there are sections for "Contact Roles (0)", "Partners (0)", and "Stage History (1)". The Stage History section shows one entry: "Prospecting" at "31/12/2022".

Bottom Navigation: The bottom of the screen features the Windows taskbar with icons for Start, Search, Task View, Edge, File Explorer, Google Chrome, Word, Excel, and Powerpoint. The system tray shows the date and time as 10:58 AM on 12/17/2022.

Part A, Task 1:

Update FoodStars.Org Opportunity Record

The American Dream Academy | Copy of Independent Project: Use | Hands-On Orgs | FoodStars.org | Salesforce

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d0000AhMB0AAN/view

Sales Home Op

Opportunity FoodStars.org

December • 2022

First Contact Call You logged a call

Edit Contact Roles

Search...

PRIMARY CONTACT (OPTIONAL)

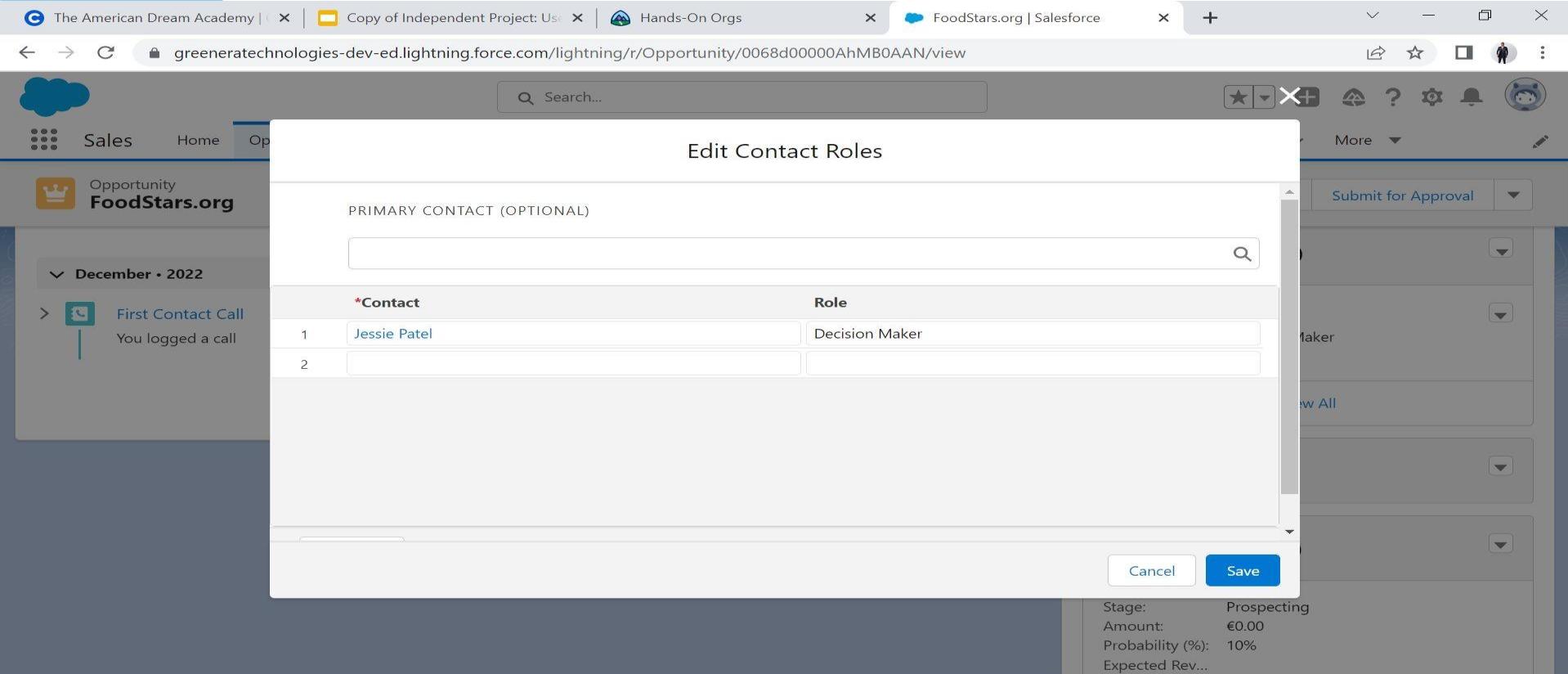
*Contact Role

	Contact	Role
1	Jessie Patel	Decision Maker
2		

Cancel Save

Stage: Prospecting
Amount: €0.00
Probability (%): 10%
Expected Rev...

Submit for Approval



Part A, Task 1:

Update FoodStars.Org Opportunity Record

The screenshot shows a Salesforce Lightning interface for an opportunity record. The top navigation bar includes tabs for 'FoodStars' (selected), 'Sales', 'Home', 'Opportunities' (active), 'Leads', 'Tasks', 'Files', 'Notes', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', and 'More'. The title bar shows the URL: greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMB0AAN/view. The main content area displays the opportunity details for 'FoodStars.org'. The 'Activity' tab is selected, showing a summary of recent activity: 'New Task' and 'Log a Call'. Below this, sections for 'Upcoming & Overdue' and 'December • 2022' show no tasks. A note states: 'FoodStars.org would need two SimplySocial licenses that grant access to the same SimplySocial account so both Martha and Jessie can manage the company's social media accounts.' The right sidebar contains sections for 'Attachments (1)', 'KB (1)', and 'Comments (1)'. The footer shows a page number '1 of 1'.

FoodStars.org would need two SimplySocial licenses that grant access to the same SimplySocial account so both Martha and Jessie can manage the company's social media accounts.

Attachments (1)

KB (1)

Comments (1)

Page 1 of 1

Part A, Task 1:

Update FoodStars.Org Opportunity Record

The American Dream Academy | x | Copy of Independent Project: Use | Hands-On Orgs | FoodStars.org | Salesforce

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d0000AhMB0AAN/view

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards More

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

December • 2022 This Month

First Contact Call Today

You logged a call

November • 2022 Last Month

Event to discuss sales and Demo 10:00 | 25 Nov

You had an event with Jessie Patel

No more past activities to load.

Contact Roles (1)

Jessie Patel Decision Maker

Role: Title:

View All

Partners (0)

Stage History (1)

Stage: Prospecting
Amount: €0.00
Probability (%): 10%
Expected Rev...
Close Date: 31/12/2022
Last Modified: Oabonna Nawu

11:26 AM

Part A Task 1:

Update FoodStars.Org Opportunity Record

The American Dream Academy | x | Copy of Independent Project: Use | Hands-On Orgs | FoodStars.org | Salesforce

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d0000AhMB0AAN/view

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards More

Search...

Upcoming & Overdue

Comfirm Budget with Jessie on call
You have an upcoming task with Jessie Patel

No due date

December • 2022

First Contact Call
You logged a call

This Month

Today

November • 2022

Event to discuss sales and Demo
You had an event with Jessie Patel

Last Month

10:00 | 25 Nov

No more past activities to load.

Contact Roles (1)

Jessie Patel
Role: Decision Maker
Title:

View All

Partners (0)

Stage History (2)

Stage: Prospecting
Amount: €700.00
Probability (%): 10%
Expected Rev... €70.00
Close Date: 21/12/2022

Type here to search

11:30 AM

Part A, Task 1:

Update FoodStars.Org Opportunity Record

The American Dream Academy | x | Copy of Independent Project: Use | Hands-On Orgs | FoodStars.org | Salesforce

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMB0AAN/view

Search...

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards More

Opportunity FoodStars.org

Follow New Case Clone Submit for Approval

Account Name Close Date Amount Opportunity Owner
31/12/2022 €700.00 Ogbonna Ngwu

Value Prop... Id. Decision ... Perception ... Proposal/Pri... Negotiation... Closed

Mark Stage as Complete

Activity Details Chatter

New Task Log a Call New Event Email

Create a task... Add

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

Related Products (0)

Notes & Attachments (1)

FoodStars 17 Dec 2022 • 12KB • docx

Type here to search

11:32 AM 12/17/2022

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.

- *I ensured that the title of the opportunity in my screenshot is clearly visible.*

Step 1: Past activities showing the call logged with Denise

Step 2: Notes section showing I added a note about licenses

Step 3: Details tab showing I 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

The American Dream Academy | x | Copy of Independent Project: Use x | Hands-On Orgs x | Yaloo Search | Salesforce x | +

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMDLAA3/view

Search... Follow New Case Clone Submit for Approval

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards More

Opportunity Yaloo Search

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

December • 2022 This Month Today

First Contact Call
You logged a call with Denise

Name: Denise
Description: Call to water the ground, intros and establish there is a need for our product at Yaloo search.
Loading...

Upload Files
Or drop files

Contact Roles (0)

Partners (0)

Stage History

11:40 AM

Part A, Task 2:

Update Yaloo Search Opportunity Record

The American Dream Academy | x | Copy of Independent Project: Use | Hands-On Orgs | Yaloo Search | Salesforce

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMDLAA3/view

Yaloo Search

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards More

Opportunity Yaloo Search

December • 2022

First Contact Call

You logged a call with D

Name
Denise

Description
Call to water the ground

Denise is very excited about SimplySocial's products and capabilities, especially the ability to handle multiple users and integrate multiple social media accounts. Because she works at a larger company as a director of marketing operations, she finds this very valuable. She anticipates that her team of 10 social media managers and content creators will need 10 separate licenses.

Submit for Approval

(0)

(1)

ecting

/2022
nna Ngwu
/2022, 19:36

View All

Page 1 of 1

Part A, Task 2:

Update Yaloo Search Opportunity

Record

The American Dream Academy | X | Copy of Independent Project: Use | Hands-On Orgs | Yaloo Search | Salesforce

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMDLAA3/view

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards More

Search...

Opportunity Yaloo Search

Account Name Yaloo Search Close Date 31/12/2022 Amount €10,000.00 Opportunity Owner Ogbonna Ngwu

+ Follow New Case Clone Submit for Approval

Prospecting Qualification Needs Analy... Value Propo... Id. Decision ... Perception ... Proposal/Pri... Negotiation... Closed ✓ Mark Stage as Complete

Activity Details Chatter

New Task Log a Call New Event Email

Recap your call... Add

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

Related Products (0)

Notes & Attachments (1)

Yaloo Search 17 Dec 2022 • 12KB • docx

View All

Part A, Task 2:

Update Yaloo Search Opportunity Record

The American Dream Academy | x | Copy of Independent Project: Use x | Hands-On Orgs x | Yaloo Search | Salesforce x | +

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMDLAA3/view

Sales Home Op

Opportunity Yaloo Search

Search... Edit Contact Roles

Submit for Approval

PRIMARY CONTACT (OPTIONAL)

*Contact	Role
1 Kenny Lopez	Influencer
2 Wonhee Kim	Influencer
3	

Cancel Save

View All

This screenshot shows a Salesforce Lightning interface for updating an opportunity record. The main title is 'Yaloo Search' under the 'Opportunities' tab. A modal window titled 'Edit Contact Roles' is open, showing a table of contacts assigned to the opportunity. The table has two columns: 'Contact' and 'Role'. There are three rows: Row 1 contains contact 'Kenny Lopez' with role 'Influencer'; Row 2 contains contact 'Wonhee Kim' with role 'Influencer'; and Row 3 is empty. The 'Save' button at the bottom right of the modal is highlighted in blue.

Part A, Task 2:

Update Yaloo Search Opportunity

Decord

The screenshot shows a Salesforce Lightning interface for an opportunity record. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar. The main content area displays the opportunity details for 'Yaloo Search'. The opportunity summary includes a crown icon, the name 'Yaloo Search', and a status section with a 'Follow' button and links for 'New Case', 'Clone', and 'Submit for Approval'. Below this, there's a 'Recent Activity' section titled 'Upcoming & Overdue' showing a 'Product Demo Event' scheduled for 13:00 on 30 Dec. Another section titled 'December • 2022' shows a 'First Contact Call' made today. To the right, three related lists are visible: 'Yaloo Search' (1 item), 'Contact Roles (2)' listing 'Wonhee Kim' (Influencer) and 'Kenny Lopez' (Influencer), and 'Partners (0)'. The bottom of the page has a footer with the text 'javascript:void(0);'.

The American Dream Academy | x | Copy of Independent Project: Use x | Hands-On Orgs x | Yaloo Search | Salesforce x +

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMDLAA3/view

Search...

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards More

Opportunity Yaloo Search

+ Follow New Case Clone Submit for Approval

Upcoming & Overdue

Product Demo Event
You have an upcoming event with Denise

13:00 | 30 Dec

December • 2022

This Month

Today

No more past activities to load.

Yaloo Search
17 Dec 2022 • 12KB • docx

Contact Roles (2)

Wonhee Kim Influencer
Role: Title:

Kenny Lopez Influencer
Role: Title:

Partners (0)

javascript:void(0);

Part A, Task 2:

Update Yaloo Search Opportunity

Record

The American Dream Academy | x | Copy of Independent Project: Us... x | Hands-On Orgs x | Yaloo Search | Salesforce x | +

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMDLAA3/view

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards More

Search...

Opportunity Yaloo Search

+ Follow New Case Clone Submit for Approval

Account Name Yaloo Search Close Date 31/12/2022 Amount €10,000.00 Opportunity Owner Ogbonna Ngwu

Needs Analy... Value Propo... Id. Decision ... Perception ... Proposal/Pri... Negotiation... Closed ✓ Mark Stage as Complete

Activity Details Chatter

New Task Log a Call New Event Email

Set up an event... Add

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

Related Products (0)

Notes & Attachments (1)

Yaloo Search 17 Dec 2022 • 12KB • docx

View All

Upcoming & Overdue

Part A, Task 3: Use Opportunity Kanban

Added a screenshot showing the updated opportunity Kanban board on the following slide. I made sure to 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

The screenshot shows a Salesforce Opportunities Kanban board titled "Recently Viewed". The board has eight columns representing different stages of the sales process: Prospecting, Qualification, Needs Analysis, Value Proposition, Id. Decision Ma..., Perception Anal..., and Proposal/Pric... The first three columns have data, while the others are empty.

Opportunities Recently Viewed

4 items • Sorted by Amount • Updated a few seconds ago

Prospecting (2)	Qualification (0)	Needs Analysis (1)	Value Proposition (1)	Id. Decision Ma... (0)	Perception Anal... (0)	Proposal/Pric...
€0		€10,000	€700			
Attitude Talent Agen... Attitude Talent Agency Prospecting		Yaloo Search Yaloo Search Needs Analysis	FoodStars.org Value Proposition			
Kiran and Co Market... Kiran and Co Marketers Prospecting						

Search this list... New

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards More

Recently Viewed | Opportunities

Part A, Task 4: Business Case Analysis



In a short paragraph, I described 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 my description, I included:

- The overall purpose of opportunity records, opportunity stages, and opportunity Kanban
- The steps I 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

Purpose of Opportunity Records, Stages, and Kanban:

1. To help AEs have an organised sales Opportunity pipeline
2. To make sales process not be random process
3. To have central database of sales processes accessible to every member of the sales team.
4. To make sales efficient and opportunity stages of sales activity tracked in the easiest possible way.

Steps I took to help AEs organise and progress opportunities.

I showed the AE how to:

1. Log new opportunities into Salesforce
2. How to log tasks, calls, events, contact roles and notes into sales and keep track of them all.
3. How update opportunity stages in Salesforce

How to use Kanban View to keep track of opportunities in the sales pipeline in visual format.

How businesses would benefit from using opportunity and opportunity stages:

5. Though it is not same across businesses but splitting it in stages will help the AEs to know exactly what stage of sales activity the sales pipeline is currently on and help AEs know exactly what to do/expect next.
6. It makes sales activity trackable and easy to review for reference purposes.

You have reached the end of Part A!



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



Inserted screenshots for each of the new products I created. Made sure that screenshots of the product record page shows 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

The screenshot shows the Salesforce Lightning interface with the following details:

- Header:** The top navigation bar includes tabs for "The American Dream Academy", "Hands-On Orgs", "New Product | Salesforce", and "Copy of Independent Project: Use".
- Search Bar:** A search bar with the placeholder "Search..." is located above the main content area.
- Main Navigation:** The main menu bar includes Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products (selected), Orders, Contracts, Accounts, and More.
- Left Sidebar:** The sidebar shows "Products Recently Viewed" with 0 items updated a few seconds ago. It also has a "Product Name" filter.
- Central Content:** A modal window titled "New Product" is open, displaying the "Product Information" section. It contains the following fields:
 - Product Name:** "Single License Subscription" (marked with a red asterisk)
 - Active:** A checked checkbox.
 - Product Code:** "Small-Sized Company Offering"
 - Product Family:** A dropdown menu set to "None".
 - Product Description:** A text area containing the text "1 user, 5 social media profiles".
- Bottom Buttons:** The modal footer contains three buttons: "Cancel", "Save & New", and a blue "Save" button.

Part B, Task 1: Create Products

The screenshot shows the Salesforce interface for creating a new product. The top navigation bar includes tabs for 'The American Dream Academy' and 'Hands-On Orgs'. The current tab is 'New Product | Salesforce'. A sub-tab 'Copy of Independent Project: Us...' is also visible. The browser address bar shows the URL for the product creation page.

The main menu bar includes Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, and More. The 'Products' tab is currently selected.

The left sidebar displays a 'Recently Viewed' section for products, showing one item updated 2 minutes ago. It includes a checkbox for 'Product Name' and a link to 'Single License Subscription'.

The central workspace is titled 'New Product' and contains a 'Product Information' form. The form fields include:

- * Product Name: A dropdown menu containing 'Subscription Package'.
- Active: A checked checkbox.
- Product Code: A text input field containing 'Medium-Sized Company Offering'.
- Product Family: A dropdown menu set to 'None'.
- Product Description: A large text area containing the text '4 users, 8 social media profiles'.

At the bottom right of the form are three buttons: 'Cancel', 'Save & New', and a blue 'Save' button.

Part B, Task 1: Create Products

The screenshot shows the Salesforce Lightning interface for creating a new product. The top navigation bar includes tabs for 'The American Dream Academy', 'Hands-On Orgs', 'New Product | Salesforce', and 'Copy of Independent Project: Us...'. The main menu bar has items like Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, and More. A search bar is at the top center. On the left, there's a sidebar with a 'Product Subscription Package' section showing 'Product Code: Medium-Sized Company Offering'. Below it, under 'Details', are sections for 'Product Name: Subscription Package', 'Product Code: Large-Sized Company Offering', 'Product Family: None', and 'Product Description: 8 users, 10 social media profiles'. The main content area is titled 'New Product' and contains a 'Product Information' section with fields for 'Product Name' (Subscription Package Plus), 'Active' status (checked), 'Product Code' (Large-Sized Company Offering), 'Product Family' (None), and 'Product Description' (8 users, 10 social media profiles). At the bottom right are 'Cancel', 'Save & New', and a blue 'Save' button.

New Product

Product Information

* Product Name

Subscription Package Plus

Active

Product Code

Large-Sized Company Offering

Product Family

None

Product Description

8 users, 10 social media profiles

Cancel Save & New Save

Part B, Task 1: Create Products

The screenshot shows the Salesforce Lightning interface with a 'New Product' dialog open. The dialog is titled 'New Product' and contains a 'Product Information' section. In this section, the 'Product Name' field is populated with 'Extra User License', the 'Active' checkbox is checked, the 'Product Code' field is populated with 'Large-Sized Company Offering', and the 'Product Family' dropdown is set to 'None'. The 'Product Description' field contains the text 'Additional user license that can be added to all Subscription offerings'. At the bottom of the dialog, there are three buttons: 'Cancel', 'Save & New', and a blue 'Save' button.

The background shows the Sales tab selected in the navigation bar, and a sidebar on the left displays details for a product named 'Subscription Package Plus' with a code 'Large-Sized Company Offering'.

Product Information

* Product Name: Extra User License
Active:

Product Code: Large-Sized Company Offering
Product Family: None

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

Cancel Save & New Save

greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Product2/list?filterName=Recent

The screenshot shows the Salesforce Lightning Experience interface. At the top, there's a navigation bar with links for Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products (which is the active tab), Orders, Contracts, Accounts, and More. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled "Products Recently Viewed". It displays a table with four items, each with a checkbox, product name, category, code, description, and a dropdown menu. A "New" button is located in the top right corner of the list area.

	Product Name	Product Cl...	Product Code	Product Description	Product F...
1	Extra User License	Simple	Large-Sized Company Offering	Additional user license that can be added to all Subscription offerings	None
2	Subscription Package Plus	Simple	Large-Sized Company Offering	8 users, 10 social media profiles	None
3	Subscription Package	Simple	Medium-Sized Company Offering	4 users, 8 social media profiles	None
4	Single License Subscription	Simple	Small-Sized Company Offering	1 user, 5 social media profiles	None

Part B, Task 2: Create Standard Price Books



Added screenshots showing the standard price book entry, or list price, I have added for each of the products I created. I made sure the 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

The screenshot shows the Salesforce Lightning interface with the following details:

- Page Title:** New Price Book Entry | Salesforce
- Page URL:** greeneratechnologies-dev-ed.lightning.force.com/lightning/o/PricebookEntry/new?count=7&nooverride=1&useRecordTypeCheck=1&navigationLocation=RELA...
- Header:** The American Dream Academy | Hands-On Orgs
- Search Bar:** Search...
- Navigation:** Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products (selected), Orders, Contracts, Accounts, More.
- Left Sidebar:** Product Single License Subscription (Product Code: Small-Sized Company Offering). Under Related, there is a section for Price Books (0).
- Main Content:** New Price Book Entry form.
 - * Product:** Single License Subscription (Active checked)
 - * Price Book:** Standard Price Book
 - * List Price:** 50
 - Product Code:** (disabled field)
 - Use Standard Price:** (unchecked checkbox)
- Buttons:** Cancel, Save & New, Save
- Right Sidebar:** New Opportunity, New Case, Add Standard Price button.

Part B, Task 2: Create Standard Price Books

The screenshot shows the Salesforce interface for creating a new Price Book Entry. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products (selected), Orders, Contracts, Accounts, and More. The main content area is titled "New Price Book Entry". The form fields are as follows:

- * Product:** Subscription Package (selected)
- Active:** checked
- * Price Book:** Standard Price Book (selected)
- * List Price:** 200
- Product Code:** Medium-Sized Company Offering
- Use Standard Price:** unchecked

At the bottom right of the modal are three buttons: "Cancel", "Save & New", and a blue "Save" button.

Part B, Task 2: Create Standard Price Books

The screenshot shows the Salesforce Lightning interface with the following details:

- Header:** The American Dream Academy | Hands-On Orgs | New Price Book Entry | Salesforce | Copy of Independent Project: Us... | +
- Search Bar:** Search...
- Navigation:** Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, More.
- Product Detail Sidebar:** Product: Subscription Package I, Product Code: Large-Sized Company Offering, Related: Price Books (0).
- Main Form:** New Price Book Entry.
 - * Product:** Subscription Package Plus (Active checked).
 - * Price Book:** Standard Price Book.
 - * List Price:** 400.
 - Use Standard Price:** Unchecked checkbox.
- Buttons:** Cancel, Save & New, Save.
- Right Panel:** New Opportunity, New Case, Add Standard Price button.

Part B, Task 2: Create Standard Price Books

The screenshot shows the Salesforce interface for creating a new price book entry. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products (selected), Orders, Contracts, Accounts, and More. The main content area is titled "New Price Book Entry". The form contains the following fields:

- Product:** Extra User License (selected)
- Active:** checked
- Price Book:** Standard Price Book (selected)
- List Price:** 35
- Use Standard Price:** unchecked

At the bottom right of the form are buttons for Cancel, Save & New, and Save.

Part B, Task 3: Create Custom Price Books



Inserted screenshots related to the custom price books I created, according to the following steps:

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

Step 2: The new price book for **enterprise customers** I 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

The screenshot shows the Salesforce Lightning interface with the following details:

- Header:** The American Dream Academy | Hands-On Orgs | New Price Book | Salesforce | Copy of Independent Project: Us... | Error
- Search Bar:** Search...
- Navigation:** Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, More.
- Left Sidebar:** Price Books Recently Viewed (0 items, updated a minute ago). A modal window titled "New Price Book" is open.
- Modal Window:** Title: New Price Book.
 - * Price Book Name: Nonprofit
 - Active:
 - Description: Discounted rate for all subscription options for nonprof...
 - Is Standard Price Book:
- Buttons at the bottom of the modal:** Cancel, Save & New, Save (highlighted in blue).

Part B, Task 3: Create Custom Price Books

The screenshot shows the Salesforce Lightning interface with the following details:

- Tab Bar:** Sales, Home, Opportunities, Leads, Tasks, Price Books (selected), Files, Notes, Products, Orders, Contracts, Accounts, More.
- Search Bar:** Search...
- Header:** The American Dream Academy | Hands-On Orgs | New Price Book | Salesforce | Copy of Independent Project: Use | +
- Page:** greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Pricebook2/new?navigationLocation=LIST_VIEW&backgroundContext=%2Flightning%2Fr%2F01s8...
- Left Sidebar (Details Tab):**
 - Price Book Name: Nonprofit
 - Description: Discounted rate for all subscription options for enterprise
 - Created By: Ogbonna Ngwu, 29/12/2022
- New Price Book Modal:**
 - Title:** New Price Book
 - Fields:**
 - Price Book Name:** Enterprise (Required)
 - Active:**
 - Description:** Standard rate for all subscription options for enterprise
 - Is Standard Price Book:**
 - Buttons:** Cancel, Save & New, Save

Part B, Task 3: Create Custom Price Books

The screenshot shows a Salesforce Lightning page for a custom Price Book named "Enterprise". The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Price Books (which is the active tab), Files, Notes, Products, Orders, Contracts, Accounts, and More. A search bar and various icons are also present. The main content area displays the "Price Book Entries" section, which lists four entries:

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"/>

A "View All" button is located at the bottom of this section. Below it is a "Price Book History" section, which shows one entry:

Date	Field	User	Original Value	New Value
29/12/2022, 10:34	Created.	Ogbonna Ngwu		

A "View All" button is located at the bottom of this section. The URL in the browser is greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Pricebook2/01s8d000007DX2ZAAW/view.

Part B, Task 3: Create Custom Price Books

The screenshot shows a Salesforce Lightning interface for a custom Price Book named "Nonprofit". The browser tabs include "The American Dream Academy", "Hands-On Orgs", "Nonprofit | Salesforce", and "Copy of Independent Project: Us...". The URL is "greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Pricebook2/01s8d000007DX2UAAW/view". The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, More, and a search bar. The main content area displays the "Price Book Entries (4)" section with columns for Product Name, Product Code, List Price, and Active status. It lists four entries: "Extra User License" (Large-Sized Company Offering, €26.00, Active), "Single License Subscription" (Small-Sized Company Offering, €40.00, Active), "Subscription Package" (Medium-Sized Company Offering, €160.00, Active), and "Subscription Package Plus" (Large-Sized Company Offering, €320.00, Active). A "View All" button is at the bottom of this section. Below it is a "Price Book History (1)" section showing a single entry for "Created" by "Ogbonna Ngwu" on "29/12/2022, 10:32". Buttons for Edit, Clone, and Delete are visible on the right side of the main content area.

Product Name	Product Code	List Price	Active
Extra User License	Large-Sized Company Offering	€26.00	<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"/>

[View All](#)

Date	Field	User	Original Value	New Value
29/12/2022, 10:32	Created	Ogbonna Ngwu		

[View All](#)

Part B, Task 4:

Associate Price Books With Opportunities

I Inserted 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, I ensured the opportunity name is visible, along with the associated products and the correct prices, according to the following steps:

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

The screenshot shows a Salesforce interface for managing opportunities. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, and More. The Opportunities tab is selected. The main content area displays a list of opportunities under "FoodStars.org Products (Enterprise)". A single item is listed: "Extra User License" with a quantity of 2.00, sales price of €35.00, and a date of 31/12/2022. The line description notes "Needs extra two users". Action buttons at the top right include Add Products, Edit Products, Choose Price Book, and Sort Products.

Product	Quantity ↑	Sales Price	Date	Line Description
1 Extra User License	2.00	€35.00	31/12/2022	Needs extra two users

Part B, Task 4:

Associate Price Books With Opportunities

The screenshot shows a Salesforce interface for managing opportunities. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, and More. The Opportunities tab is currently selected. The main content area displays a table of opportunity line items. The table has columns for Product, Quantity, Sales Price, Date, and Line Description. One item is listed: "Subscription Package Plus" with a quantity of 1.00, a sales price of €400.00, a date of 08/01/2023, and a line description of "Large-sized(10 users)".

Product	Quantity ↑	Sales Price	Date	Line Description
1 Subscription Package Plus	1.00	€400.00	08/01/2023	Large-sized(10 users)

Part B, Task 5: Create Quotes

On the following slide, I added a screenshot of the Initial Quote record page for the Yaloo Search opportunity that I just made. I made sure the 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

The screenshot shows the Salesforce Lightning interface for a quote record titled "Initial Quote".

Header: The top navigation bar shows tabs for "The American Dream Academy", "Hands-On Orgs", "Initial Quote | Salesforce", and "Copy of Independent Project: Us...". The browser address bar displays the URL: "greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Quote/0Q08d000000000rCYCAY/view".

Toolbar: The toolbar includes standard Salesforce icons for Home, Opportunities, Leads, Tasks, Price Books, Files, Quotes, Notes, Products, Orders, Contracts, and More.

Quote Record View: The main area displays the quote details:

- Quote Number:** 00000001
- Expiration Date:** 31/01/2023
- Syncing:**
- Opportunity Name:** Yahoo Search
- Account Name:** Yahoo Search
- Grand Total:** €450.00

Status Bar: Below the quote details is a status bar with green checkmarks indicating steps completed, followed by a blue button labeled "Approved". Other buttons include "Rejected", "Presented", "Accepted", and "Denied". A "Mark Status as Complete" button is also present.

Related: The "Related" section contains a table for "Quote Line Items (1)".

Product	Sales Price	Quantity	Subtotal
Subscription Package Plus	€400.00	1.00	€400.00

Details: The "Details" section is currently empty.

Activity: The "Activity" section includes a "New Event" button and a "Set up an event..." input field. It also features filters for "All time • All activities • All types" and buttons for "Refresh", "Expand All", and "View All".

Quote PDFs: The "Quote PDFs (0)" section is currently empty.

Part B, Task 6: Send Quotes



Inserted screenshots related to the quote I 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 I will send to Denise.

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

Part B, Task 6: Send Quotes

The American Dream Academy | X | Hands-On Orgs | PDF Preview | Salesforce | Copy of Independent Project: Us... | +

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Quote/0Q08d0000000rCYCAY/view

Search...

PDF Preview

quoteTemplateDataViewer.apexp

1 / 1 | - 80% + | Download Print ...

Greenera Technologies

Company Address: NG
Created Date: 29/12/2022
Expiration Date: 31/01/2023
Quote Number: 00000001

Prepared By: Ogbonna Ngwu
Email: ngwu.princee@gmail.com

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

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

Product	Date	List Price	Sales Price	Quantity	Total Price
Subscription Package Plus	08/01/2023	€400.00	€400.00	1.00	€400.00

Subtotal: €400.00
Discount: 0.00%
Total Price: €400.00

Save and Email Quote | Save to Quote | Cancel

Quote PDFs (0)

Upcoming & Overdue

No activities to show.

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

Part B, Task 6: Send Quotes

The American Dream Academy | X | Hands-On Orgs | PDF Preview | Salesforce | Copy of Independent Project: Use | +

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Quote/0Q08d0000000rCYCAY/view

Sales Home

Quote Initial Quote

Quote Number
00000001

Related

Quote Line

Product

Subscription Package

Quote PDFs (1)

Name Discount Grand Total Created By

Approved Quote

Bcc ngwu.princeo@gmail.com X

Subject Approved Quote

Font Size B I U A

Hey {{Recipient.FirstName}}.

Below is an attached copy of the Quote for the product that best meets your business needs.

Let me know about what your next step is as we close this deal.

Best Regards,

{{{Sender.CompanyName}}}

Powered by Salesforce
<http://www.salesforce.com/>

Initial Quote_V1

Send

New Case

Status as Complete

Email Add

Activities • All types Expand All View All

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

Part B, Task 7: Close the Deal



Inserted screenshots on the following slides showing I have correctly closed the Yaloo Search and FoodStars.org opportunities.

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

- *Ensured the screenshot shows the opportunity stage status updated accordingly.*

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

- *Ensured screenshot show the opportunity stage updated accordingly and the note I created explaining why it was closed.*

Part B, Task 7: Close the Deal

The American Dream Academy | X | Hands-On Orgs | Yaloo Search | Salesforce | Copy of Independent Project: Use | +

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d0000AhMDLAA3/view

Search...

Sales Home Opportunities Leads Tasks Price Books Files Quotes Notes Products Orders Contracts More

Opportunity Yaloo Search

+ Follow New Case Clone Submit for Approval

Account Name Yaloo Search Close Date 29/12/2022 Amount €400.00 Opportunity Owner Ogbonna Ngwu

Closed Won Change Closed Stage

Activity Details Chatter

New Task Log a Call New Event Email

Create a task... Add

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

Upcoming & Overdue

> Product Demo Event 13:00 | Tomorrow You have an upcoming event with Denise

Related Products (1)

Subscription Package Plus

Quantity: 1.00
Sales Price: €400.00
Date: 08/01/2023

View All

Notes & Attachments (1)

Part B, Task 7: Close the Deal

The screenshot shows a Salesforce Opportunity record for "FoodStars.org". The opportunity has an account name of "FoodStars.org", a close date of "31/12/2022", and an amount of "€70.00". The opportunity owner is "Ogbonna Ngwu". The stage of the opportunity is "Closed Lost". The "Details" tab is selected, showing fields like Opportunity Owner, Amount, Expected Revenue, Close Date, Next Step, Type, Stage, and Lead Source. The "Related" section shows one product related to the opportunity, which is an "Extra User License" with a quantity of 2.00 and a sales price of €35.00. The date for this product is 31/12/2022.

Opportunity

FoodStars.org

Account Name: FoodStars.org

Close Date: 31/12/2022

Amount: €70.00

Opportunity Owner: Ogbonna Ngwu

Prospecting Qualification Needs Analysis Value Proposit... Id. Decision M... Perception An... Proposal/Pric... Negotiation/R... **Closed Lost** Change Closed Stage

Activity Details Chatter

Opportunity Owner: Ogbonna Ngwu

Amount: €70.00

Expected Revenue: €0.00

Close Date: 31/12/2022

Next Step:

Type: New Customer

Lead Source: javascript:void(0)

Related Products (1)

Extra User License

Quantity: 2.00

Sales Price: €35.00

Date: 31/12/2022

View All

Notes & Attachments (1)



Sales

Home

Opportunities ▾

Leads ▾

Tasks ▾

Price Books ▾

Files ▾

Quotes ▾

Notes ▾

Products ▾

Orders ▾

Contracts ▾

Accounts ▾

More ▾

New

Recently viewed ▾

7 items

why not converted

29/12/2022, 11:40 by Ogbonna Ngwu

Hard no need for our product as a new CEO took over

why not converted

29/12/2022, 11:38 by Ogbonna Ngwu

Sandro had a meeting scheduled with Janet set for Nov 19th, but he received an email from her saying that her team is actually...

why not converted

03/12/2022, 12:41 by Ogbonna Ngwu

Martha New didn't answer the first call, so Sandro tried calling again per the task created in Salesforce earlier. They did n...

initial call summary

03/12/2022, 07:48 by Ogbonna Ngwu

Director of marketing operations at a large company so it's likely that there are multiple stakeholders we'll need to appeal to. Follo...

call summary

03/12/2022, 07:44 by Ogbonna Ngwu

follow-up call notes

03/12/2022, 07:30 by Ogbonna Ngwu

Has a social media marketing tool that she is satisfied with but has some definite needs that SimplySocial's tool can solve that hers...

Search...



why not converted

Visibility Set by Record



Hard no need for our product as a new CEO took over

Related to FoodStars.org

View Version History

Delete

Share

Add to Records

Part B, Task 8: Create Contracts

On the following slide, I inserted a screenshot of the new contract for Yaloo Search that I just created, ensuring the account name, status, and contract term are visible.

Part B, Task 8: Create Contracts

The screenshot shows a Salesforce Lightning interface for creating a new contract. The browser tabs indicate the user is on a dev-ed instance of the platform.

Contract Details:

- Contract Number:** 00000100
- Account Name:** Yaloo Search
- Status:** Activated
- Contract Start Date:** 31/12/2022
- Contract End Date:** 30/12/2023
- Contract Term (months):** 12

Status Bar: Shows the status as **Activated**.

Activity: A section for tracking upcoming and overdue activities, currently showing "No activities to show." It includes buttons for **New Event**, **New Task**, **Log a Call**, and **Email**.

Related: A sidebar listing related objects and their details.

- Contract Owner:** Ogbonna Ngwu
- Contract Number:** 00000100
- Account Name:** Yaloo Search
- Customer Signed By:** Denise
- Customer Signed Title:** Customer Signed Date
- Customer Signed Date:** javascript:void(0);

Details: A main section displaying the contract's key details.

- Status:** Activated
- Contract Start Date:** 31/12/2022
- Contract End Date:** 30/12/2023
- Contract Term (months):** 12
- Owner Expiration Notice:** 30 Days
- Company Signed By:** (empty)

You have reached the end of Part B!

