



Lead Management in Salesforce

Independent Project: Use Salesforce to Identify Sales Prospects

Christian Chukwuemeka Nzeanorue

Part A Overview

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- 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

Software used: Trailhead playground and salesforce developer account





Part A, Task 1: Structure and Download

Lead Data

After I finished cleaning up the data and fixing all the errors in the spreadsheet data, I inserted a screenshot of all the lead data in my spreadsheet. The columns in the spreadsheet, including:

- First Name
- Last Name
- Title
- Company
- Phone Number
- Email



Part A, Task 1: Screenshot

Screenshot of a Google Sheets document titled "Copy of Independent Project, Part A: Inbound Leads". The document contains a table with columns: First Name, Last Name, Title, Company, Phone Number, and Email. The data is as follows:

	A	B	C	D	E	F
1	First Name	Last Name	Title	Company	Phone Number	Email
2	Thandiwe	Bandi	Social Media Marketer	Jazz Mystics Music Group	(441) 709-5905	tbandi@jazzmystics.com
3	Denise	Choi	Director of Marketing Operations	Yaloo Search	(824) 617-6033	dchoi@yaloooyos.com
4	Chidi	Seydou	Social Media Intern	Attitude Talent Agency	(851) 923-3824	chidiseydou415@attitude.com
5	Manisha	Visvanathan	Senior Growth Marketing Mana	Growlers and Stuff Craft Brewery	(326) 598-4003	manishavis@growlers.com
6	Janet	Steinberg	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com
7	Lawrence	Ramirez	Digital Marketing Manager	Collection Consulting Group	(346) 269-7771	lawrence@collectionconsulting.co
8	Martha	Newman	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org
9	Kiran	Stefcia	Director of Marketing	Kiran and Co Marketers	(347) 810-3329	kiranstefcia@marketersco.com
10	Jay	Farley	Content Marketing Manager	Random Wishes Builders	(735) 716-5095	jayfarley1985@wishes.com
11	Danika	Marcia	Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	danika@tedstoys.com
12						
13						

The document is part of a Google Drive folder named "Copy of Independent Project" and was last edited 4 minutes ago. The browser tabs show other projects and the Salesforce home page. The Windows taskbar at the bottom shows the search bar, file explorer, and system icons.



Part A, Task 2: Import Data in Salesforce

I navigated to the App launcher and opened the Sales app to the Leads tab. Organized the lead list so that the most recently created leads appear first. Then, inserted a screenshot to show all 10 of the leads that I just uploaded on the following slide.

Part A, Task 2: Screenshot



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

Leads Today's Leads

10 items • Sorted by Name • Filtered by All leads - Created Date • Updated 6 minutes ago

	Name ↑	Company	Email	Lead Status	Created Date	Own...	U...
1	Chidi Seydou	Attitude Talent Agency	chidiseydou415@attitude.com	Open - Not Contact...	16/11/2022, 16:...	ONGwu	<input checked="" type="checkbox"/>
2	Danika Marcia	Ted's Toy Shop	danika@tedstoys.com	Open - Not Contact...	16/11/2022, 16:...	ONGwu	<input checked="" type="checkbox"/>
3	Denise Choi	Yaloo Search	dchoi@yaloooyos.com	Open - Not Contact...	16/11/2022, 16:...	ONGwu	<input checked="" type="checkbox"/>
4	Janet Steinberg	Costumez Warehouse	janet.steinberg@costumez.com	Open - Not Contact...	16/11/2022, 16:...	ONGwu	<input checked="" type="checkbox"/>
5	Jay Farley	Random Wishes Builders	jayfarley1985@wishes.com	Open - Not Contact...	16/11/2022, 16:...	ONGwu	<input checked="" type="checkbox"/>
6	Kiran Stefcia	Kiran and Co Marketers	kiranstefcia@marketersco.com	Open - Not Contact... <input checked="" type="checkbox"/>	16/11/2022, 16:...	ONGwu	<input checked="" type="checkbox"/>
7	Lawrence Ramirez	Collection Consulting Group	lawrence@collectionconsulting....	Open - Not Contact...	16/11/2022, 16:...	ONGwu	<input checked="" type="checkbox"/>
8	Manisha Visvanath...	Growlers and Stuff Craft Brewe...	manishavis@growlers.com	Open - Not Contact...	16/11/2022, 16:...	ONGwu	<input checked="" type="checkbox"/>
9	Martha Newman	FoodStars.Org	martha.newman@foodstars.org	Open - Not Contact...	16/11/2022, 16:...	ONGwu	<input checked="" type="checkbox"/>
10	Thandiwe Bandi	Jazz Mystics Music Group	tbandi@jazzmystics.com	Open - Not Contact...	16/11/2022, 16:...	ONGwu	<input checked="" type="checkbox"/>

Type here to search

9:01 AM
11/16/2022



Part A, Task 3: Create a List View and Filter for Leads

I Inserted screenshot of the Demo leads list view for each of the steps below in the following slides. My screenshots showed that I have:

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.

Part A, Task 3: Step 1 screenshot



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

Leads Demo Leads

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

	Name	Company	Email	Lead Status	Created Date	Own...	U...
1	Chidi Seydou	Attitude Tale...	chidiseydou...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
2	Danika Marcia	Ted's Toy Sh...	danika@ted...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
3	Denise Choi	Yaloo Search	dchoi@yalo...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
4	Janet Steinb...	Costumez W...	janet.steinb...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
5	Jay Farley	Random Wi...	jayfarley198...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
6	Kiran Stefcia	Kiran and C...	kiranstefcia...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
7	Lawrence Ra...	Collection C...	lawrence@c...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
8	Manisha Vis...	Growlers an...	manishavis...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
9	Martha New...	FoodStars.Org	martha.new...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
10	Thandiwe B...	Jazz Mystics...	tbandi@jazz...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>

Filters

Filter by Owner
All leads

Matching all of these filters

Created Date
equals TODAY

Add Filter Remove All

Add Filter Logic

javascipt:void(0);

Type here to search

9:07 AM 11/16/2022

Part A, Task 3: Step 2 screenshot



The screenshot shows a Salesforce Lightning interface for the "Demo Leads" page. The top navigation bar includes tabs for "Sales", "Home", "Opportunities", "Leads", "Tasks", "Files", "Accounts", "Contacts", "Campaigns", "Dashboards", "Reports", "Chatter", and "More". The "Leads" tab is currently selected. The main content area displays a list of 10 leads, each with columns for Name, Company, Status, Email, Lead Status, Created Date, Owner, and Update. The lead list is sorted by Name and filtered by All leads - Created Date, Lead Status. A sidebar on the right contains filter logic: "Filter by Owner All leads", "Matching all of these filters", "Created Date equals TODAY", "Lead Status equals Open - Not Contacted", "Add Filter", and "Remove All". The bottom of the screen shows the Windows taskbar with various pinned icons and a search bar.

#	Name	Company	Status	Email	Lead Status	Created Date	Owner	
1	Chidi Seydou	Attitude Tale...	chidiseydou...		Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
2	Danika Marcia	Ted's Toy Sh...		danika@ted...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
3	Denise Choi	Yaloo Search		dchoi@yalo...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
4	Janet Steinb...	Costumez W...		janet.steinb...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
5	Jay Farley	Random Wi...		jayfarley198...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
6	Kiran Stefcia	Kiran and C...		kiranstefcia...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
7	Lawrence Ra...	Collection C...		lawrence@c...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
8	Manisha Vis...	Growlers an...		manishavis...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
9	Martha New...	FoodStars.Org		martha.new...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
10	Thandiwe B...	Jazz Mystics...		tbandi@jazz...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>

javascipt:void(0);

9:14 AM
11/16/2022



Part A, Task 3: Step 3 screenshot

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

Leads Demo Leads

10 items • Sorted by Company • Filtered by All leads - Created Date, Lead Status • Updated a few seconds ago

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

Type here to search

9:29 AM 11/16/2022



Part A, Task 3: Step 4 screenshot

The screenshot shows a browser window displaying the Salesforce Lightning interface. The URL in the address bar is `greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Lead/list?filterName=00B8d00000AeVcKEAV`. The page title is "Demo Leads | Lead".

The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and more. The "Demo Leads | Leads" tab is currently selected.

The main content area displays a list of leads. The columns are: Name, Lead Status, Title, Company, Phone, and Email. The leads are sorted by Company and updated 6 minutes ago. The list contains 10 items:

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

The bottom of the screen shows the Windows taskbar with the Start button, a search bar, and icons for File Explorer, Google Chrome, Microsoft Word, and Microsoft Excel. The system tray shows the date and time as 9:34 AM, 11/16/2022.



Part A, Task 4: Associate Your Leads with a Campaign

After I associated all 10 leads with the new campaign, I navigated to the Campaigns tab of the Sales app, took a screenshot of the Campaign Members page of the Social Media Conference Email that shows all the leads I have just associated with this campaign, and insert it on the next slide.



Part A, Task 4: Screenshot

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards * Demo Leads | Leads More

Campaigns > Social Media Conference Email Campaign Campaign Members

10 items • Sorted by Last Modified Date • Updated a few seconds ago

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

9:58 AM 11/16/2022

Part A, Task 5: Business Case Analysis



In a short paragraph on the following slide, I described describe how imported and organized data in Salesforce would help the sales and marketing teams at SimplySocial. In my description, I included:

- The overall purpose of importing and organizing data.
- The major steps I 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

1. Overall purpose of importing data to salesforce: this will help keep the data in a central place to be accessible to both the marketing and sales department and enhance collaboration and sales/marketing operations.
2. Overall steps: i took the data, cleaned it. I used the import wizard in salesforce to import the csv file. I created View filter to only have the important data i am working with. I removed the unnecessary columns and created a filter on the Lead status column. I associated the leads to a campaign.
3. Simplysocial marketing and Sales teams will have access to central database that organises and keeps the workflow in order for easy reference, leads status update, task tracking etc

You have reached the end of Part A!



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





Part B Task 1: Filter Leads

After creating the necessary filter for the Demo Leads list, I inserted a screenshot showing the list with the leads filtered by manager. I adjusted the size of the Title column so that all the leads' titles can be read.



Part B Task 1: Screenshot

The screenshot shows a browser window displaying the Salesforce Lightning interface. The URL in the address bar is `greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Lead/list?filterName=00B8d00000AeVcKEAV`.

The page title is "Demo Leads | Leads | Salesforce". The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar.

The main content area displays a list of leads under the heading "Demo Leads". The columns are Name, Lead Status, Title, Company, and Phone. The data is as follows:

	Name	Lead Status	Title	Company	Phone
1	Janet Steinberg	Open - Not Contacted	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836
2	Jay Farley	Open - Not Contacted	Content Marketing Manager	Random Wishes Build...	(735) 716-5095
3	Lawrence Ramirez	Open - Not Contacted	Digital Marketing Manager	Collection Consulting ...	(346) 269-7771
4	Manisha Visvanath...	Open - Not Contacted	Senior Growth Marketing Manager	Growlers and Stuff Cra...	(326) 598-4003
5	Martha Newman	Open - Not Contacted	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927

On the right side, there is a sidebar titled "Filters" containing three filter conditions:

- Filter by Owner: All leads
- Matching all of these filters
 - Lead Status equals Open - Not Contacted
 - Title contains manager

At the bottom, there are buttons for "Add Filter" and "Remove All", and links for "Add Filter Logic" and "Add Filter Logic".

The bottom of the screen shows the Windows taskbar with the Start button, a search bar, and icons for File Explorer, Edge, Google Chrome, Word, Excel, and a file folder. The system tray shows the date and time as 2:58 PM on 12/2/2022, along with battery and signal strength indicators.



Part B Task 2: Initiate Contact with Leads via Email

I Inserted screenshots to show that I emailed Janet, Thandiwe, Martha, and Denise. My screenshots display the past activities log for each of these leads showing that I 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 I emailed them.

Step 2: Past activity for **Thandiwe Bandi** showing I emailed them.

Step 3: Past activity for **Martha Newman** showing I emailed them.

Step 4: Past activity for **Denise Choi** showing I emailed them.



Part B Task 2: Step 1 screenshot

The screenshot shows a browser window displaying the Salesforce Lightning interface for a Lead record. The URL in the address bar is `greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvHEAU/view`.

The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar. A sidebar on the left shows sections for Upcoming & Overdue activities (none shown), December 2022 (Toolkit for managers), and December 2022 (This Month). The main content area displays the Lead record for Martha Newman, showing fields like Name, Company, and Contact information, along with sections for Write an email..., Notes (0), and Campaign History (1).

At the bottom, the Windows taskbar shows the Start button, a search bar with "Type here to search", and icons for File Explorer, Edge, File, Word, Excel, and Google Chrome. The system tray shows the date and time as 3:11 PM, 12/2/2022.



Part B Task 2: Step 2 screenshot

The screenshot shows a browser window displaying the Salesforce Lightning interface for a Lead named Chidi Seydou. The URL in the address bar is greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvDEAU/view.

The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar. The Leads tab is currently selected.

The main content area displays the Lead record for Chidi Seydou. It includes sections for Upcoming & Overdue activities (none shown), December 2022 activity (an unopened email to Chidi Seydou), November 2022 activity (a bounced email to Chidi Seydou), and a Campaign History section showing one entry for a Social Media Conference Email Campaign.

Campaign History (1)

Social Media Conference Email Campaign	
Start Date:	24/07/2022
Type:	Email
Status:	Responded

[View All](#)

At the bottom of the page, there is a search bar and a system status bar showing the date and time (3:21 PM, 12/2/2022).



Part B Task 2: Step 3 screenshot

The screenshot shows a web browser window displaying the Salesforce Lightning interface. The URL in the address bar is greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvIEAU/view.

The top navigation bar includes tabs for Sales, Home, Opportunities, Leads (selected), Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar. A sidebar on the left lists recent activities: "Manager dream tools" (Unopened, 23:30 | Today), "product demo meeting" (Last Month, 15:45 | 22 Nov), "first conversation" (18 Nov), and "Lets get in touch!" (Bounced, 16:23 | 18 Nov). A message from Kiran Stefcia is shown: "No activities to show. Get started by sending an email, scheduling a task, and more." The right side features a "Campaign History (1)" section for a "Social Media Conference Email Campaign" (Start Date: 24/07/2022, Type: Email, Status: Responded).

At the bottom, there is a taskbar with icons for File, Home, Recent, and a search bar. The system tray shows the date and time as 3:30 PM, 12/2/2022.



Part B Task 2: Step 4 screenshot

Salesforce interface screenshot showing the Lead view for Janet Steinberg.

Lead Information:

- Lead Name: Janet Steinberg
- Type: Lead
- Follow button: + Follow
- Action buttons: New Case, Submit for Approval, Clone

Activity Timeline:

- Upcoming & Overdue:**
 - Send package details (Task, Due 19 Nov)
- December • 2022:**
 - Manager's life saver! (Email, Unopened, Sent 07:20 | Today)
- November • 2022:**
 - Follow up call (Event, 17:00 | 19 Nov)
 - Initial Prospective Call (Call, 18 Nov)

Campaign History: (1) Social Media Conference Email Campaign
Start Date: 24/07/2022
Type: Email
Status: Responded

Search Bar: Type here to search

Bottom Navigation: Icons for Windows, Task View, Edge, File Explorer, Google Chrome, Word, Excel, and a message icon.

System Status: 11:21 PM, 12/2022



Part B Task 3: Continue Contact with Leads via Calls

I Inserted screenshots for the calls with the four leads. My 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.



Part B Task 3: Step 1 screenshot

The screenshot shows a browser window displaying the Salesforce Lightning interface for a user named Janet Steinberg. The top navigation bar includes tabs for Leads, Tasks, Notes, Accounts, Contacts, Campaigns, Dashboards, and More. A search bar is located at the top center. On the left, a sidebar titled "Upcoming & Overdue" lists tasks such as "Send package details" (due 19 Nov), "Manager's life saver!" (Unopened, 07:20 | Today), and "Follow up call" (17:00 | 19 Nov). Below this, a section for "December • 2022" shows an email to Janet Steinberg. The main content area displays a "Notes (1)" section with a note about follow-up call notes from Ogbonna Ngwu, and a "Campaign History (1)" section for a Social Media Conference Email Campaign, which started on 24/07/2022, is an Email, and has a status of Responded. The bottom of the screen shows the Windows taskbar with various pinned icons and a system tray indicating the date and time as 11:32 PM on 12/2022.

The American Dream Academy | x | Hands-On Orgs | x | Janet Steinberg | Salesforce | +

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvFEAU/view

Sales Home Opportunities Leads Tasks Notes Accounts Contacts Campaigns Dashboards More

Create a task... Add

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

Upcoming & Overdue

> Send package details 19 Nov
You have an upcoming task

> Manager's life saver! This Month
You sent an email to Janet Steinberg

> Follow up call Last Month
You had an event

> Initial Prospective Call 18 Nov
You logged a call

Notes (1)

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 to...

Campaign History (1)

Social Media Conference Email Campaign
Start Date: 24/07/2022
Type: Email
Status: Responded

Type here to search

11:32 PM 12/2022



Part B Task 3: Step 2 screenshot

The screenshot shows a browser window with three tabs open:

- The American Dream Academy
- Hands-On Orgs
- Kiran Stefcia | Salesforce

The URL in the address bar is <greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvIEAU/view>.

The main content is a Salesforce Leads page. The navigation bar includes Sales, Home, Opportunities, Leads (selected), Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar.

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

- follow up call** (checkbox) You have an upcoming task 11 Dec

December • 2022

- Manager dream tools** (envelope icon) You sent an email to Kiran Stefcia Last opened 41 minutes ago 23:30 | Yesterday

November • 2022

- product demo meeting** (calendar icon) You had an event 15:45 | 22 Nov
- first conversation** (chat icon) You logged a call 18 Nov
- Lets get in touch!** (envelope icon) You sent an email to Kiran Stefcia Bounced 16:23 | 18 Nov

Need for product
18/11/2022, 17:15 by Ogbonna Ngwu
lead is interested in the product because they have been growing to help them manage resources for employees...

Campaign History (1)

Social Media Conference Email Campaign
Start Date: 24/07/2022
Type: Email
Status: Responded

View All

Windows taskbar at the bottom: Type here to search, File Explorer, Edge, Google Chrome, Word, Excel, and a folder icon. The date and time are 11:39 PM, 12/2/2022.

Part B Task 3: Step 3 screenshot



The screenshot shows a browser window with two tabs open. The active tab is titled "Chidi Seydou | Salesforce" and displays the Lead detail page for "Chidi Seydou". The URL in the address bar is "greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvDEAU/view".

The page header includes a Sales navigation bar with options like Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar. Below the header, there's a lead summary for Chidi Seydou, followed by a list of tasks and events. A sidebar on the right shows campaign history for a "Social Media Conference Email Campaign" with one entry: "Manager's easy-life tools" (Email, Status: Responded).

At the bottom of the page, there's a message from Chidi Seydou: "it's likely that there are multiple stakeholders we'll need..." with a "View All" link. The bottom of the screen shows the Windows taskbar with the Start button, a search bar, and several pinned application icons.

Code at the bottom left: `javascript:void(0);`

Page footer: 11:54 PM 12/2/2022

Part B Task 3: Step 4 screenshot



The screenshot shows a browser window with three tabs open:

- The American Dream Academy
- Hands-On Orgs
- Martha Newman | Salesforce

The current view is within the "Martha Newman | Salesforce" tab, specifically on the Lead page for "Martha Newman".

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

The main content area displays the Lead details for "Martha Newman" and activity feeds:

- Upcoming & Overdue:**
 - Research on budget size (Task, Due 17 Dec)
 - follow-up meeting (Event, Due 08:00 | Today)
- December • 2022:**
 - Call (Logged a call, Today)
 - Toolkit for managers (Email, Unopened, 23:10 | Yesterday)

On the right side, there are two panels:

- Notes (1):** call summary (03/12/2022, 07:44 by Ogbonna Ngwu). A "View All" link is present.
- Campaign History (1):** Social Media Conference Email Campaign (Start Date: 24/07/2022, Type: Email, Status: Responded). A "View All" link is present.

At the bottom, a status bar shows "javascript:void(0); You sent an email to Martha Newman" and the date "12/2022".



Part B Task 4: Mark Leads as Hot

I added a screenshot showing the leads marked as hot and warm on the leads list. Made sure that “Rating” is a displayed field on the leads list and that I have organized the list so that hot and warm leads appear first.



Part B Task 4: Screenshot

The screenshot shows a web browser window displaying the Salesforce "All Open Leads" page. The URL in the address bar is `greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Lead/list?filterName=00B8d00000AMb65EAD`. The page title is "All Open Leads | Leads | Salesforce".

The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and various icons for search, import, and export.

The main content area displays a table titled "All Open Leads" with 25 items. The columns are: #, Name, Company, Email, Lead Status, Owner AI..., and Rating. The data is as follows:

#	Name	Company	Email	Lead Status	Owner AI...	Rating
1	Janet Steinberg	Costumez Warehouse	janet.steinberg@costumez.com	Working - Contacted	ONgwu	Warm
2	David Monaco	Blues Entertainment Corp.	david@blues.com	Working - Contacted	ONgwu	Warm
3	Kiran Stefcia	Kiran and Co Marketers	kiranstefcia@marketersco.com	Working - Contacted	ONgwu	Hot
4	Martha Newman	FoodStars.Org	martha.newman@foodstars.org	Working - Contacted	ONgwu	Hot
5	Bertha Boxer	Farmers Coop. of Florida	bertha@fcof.net	Working - Contacted	ONgwu	Hot
6	Danika Marcia	Ted's Toy Shop	danika@tedstoys.com	Open - Not Contacted	ONgwu	
7	Jay Farley	Random Wishes Builders	jayfarley1985@wishes.com	Open - Not Contacted	ONgwu	
8	Lawrence Ramirez	Collection Consulting Group	lawrence@collectionconsulting.com	Open - Not Contacted	ONgwu	
9	Manisha Visvanathan	Growlers and Stuff Craft Brewery	manishavis@growlers.com	Open - Not Contacted	ONgwu	
10	Chidi Seydou	Attitude Talent Agency	chidiseydou415@attitude.com	Working - Contacted	ONgwu	
11	Denise Choi	Yaloo Search	dchoi@yaloooyos.com	Open - Not Contacted	ONgwu	
12	Thandiwe Bandi	Jazz Mystics Music Group	tbandi@jazzmystics.com	Open - Not Contacted	ONgwu	

The bottom of the screen shows the Windows taskbar with the search bar containing "Type here to search" and the date/time "12:05 AM 12/3/2022".



Part B Task 5: Create Email Templates

Added a screenshot showing an email that can be sent to either Martha Newsom or Denise Choi. The email include a merge field for the recipient's first name.



Part B Task 5: Screenshot

Sales Home Opportunities

Email Templates All Templates

1 item • Refresh this list to view the latest

1 Email Template Name Initial outreach

Message Content

Subject: We miss you talking to us!

Enhanced Letterhead: Search Enhanced Letterheads...

HTML Value:

```
Hi {{Recipient.FirstName}}
```

We know you have a busy schedule, but we still want to talk to you again.
We sent an email last week, but do not bother about it, here is the summary:
We wanted to get a response from you on the status of your company's budget for the software update.

We are all waiting to hear from you, it's our task to serve you to satisfaction!

Regards
{{Sender.FirstName}}

Cancel Save

The screenshot shows a Salesforce interface for creating an email template. The main window displays the 'Message Content' section with a subject line 'We miss you talking to us!' and an enhanced letterhead search bar. Below is an 'HTML Value' editor containing a greeting, a message body with a summary of previous communication, and a closing statement. The bottom right of the editor has 'Cancel' and 'Save' buttons. On the left, there's a sidebar showing a list of email templates with one item named 'Initial outreach'. The top navigation bar includes tabs for Sales, Home, Opportunities, and a sidebar for Email Templates. The bottom of the screen shows a Windows taskbar with various icons and a system tray indicating the date and time as 12/3/2022 at 4:32 AM.



Type here to search



Part B Task 6: Convert Leads



Inserted screenshots on the following slides to show the updates I have made to each lead according to the directions below:

Step 1: Screenshot Thandiwe Bandi's lead record page.

- *Made sure screenshot shows the lead's name, the note I 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.

- *Made sure that the screenshot shows the lead's name, the note I 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”. Made sure that the screenshot shows the Account, Contact, and Opportunity that have been created.*

Step 4: Screenshot the popup after converting Denise Choi.

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



Part B Task 6: Step 1 screenshot

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Email Templates More

Title Social Media Marketing Manager Company FoodStars.Org Phone (2) (323) 784-7927 Email martha.newman@foodstars.org

Closed - Not Converted Converted Mark Status as Complete

Activity Details Chatter News

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

Research on budget size You have an upcoming task 17 Dec

We found no potential duplicates of this Lead.

Notes (2)

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...

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

Type here to search

4:42 AM 12/3/2022



Part B Task 6: Step 2 screenshot

Salesforce screenshot showing a Lead record for Janet Steinberg.

Lead Details: Janet Steinberg (Lead), Lead ID: 00Q8d000008aMvFEAU, Status: Closed - Not Converted.

Activity: New Task, Log a Call, New Event, Email.

Related: We found no potential duplicates of this Lead. Notes (2): Why not converted (03/12/2022, 12:45 by Ogbonna Ngwu). Sandro had a meeting scheduled with Janet set for Nov 19th, but he received an email from her saying that her...

Bottom Navigation: Send package details, Type here to search, Date: 19 Nov, Time: 4:46 AM, Date: 12/3/2022.



Part B Task 6: Step 3 screenshot

The screenshot shows a Salesforce Lightning interface with a lead conversion confirmation message. The URL in the browser is greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvIEAU/view.

The main message is "Your lead has been converted". Below it is an illustration of a flag on a mountain peak.

ACCOUNT

Kiran and Co Marketers

- Type: [Kiran and Co Marketers](#)
- Phone: (347) 810-3329
- Website:
- Account Owner: [Ogbonna Ngwu](#)
- Account Site:

CONTACT

Kiran Stefcia

- Title: Director of Marketing
- Account N... [Kiran and Co Mar...](#)
- Phone: (347) 810-3329
- Email: kiranstefcia@marketersc...
- Mobile:

OPPORTUNITY

Kiran and Co Marketers-S...

- Account N... Kiran and Co Mar...
- Close Date: 31/12/2022
- Amount:
- Opportunity O... Ogbonna N...

Buttons at the bottom right: [New Task](#) and [Go to Leads](#).

Filters: All time • All activities • All types

Refresh • Expand All • View All

Need for product
18/11/2022, 17:15 by Ogbonna Ngwu
Lead is interested in the product because

Windows taskbar at the bottom: Type here to search, File Explorer, Edge, Google Chrome, Microsoft Word, Microsoft Excel, Microsoft Powerpoint, and a system status icon.



Part B Task 6: Step 4 screenshot

The screenshot shows a Salesforce Lightning interface. At the top, there are several tabs: "The American Dream Acad", "Project Instructions | Cour", "Copy of Independent Proj", "Hands-On Orgs", "Chidi Seydou | Salesforce", and a new tab button. The URL in the address bar is "greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvDEAU/view".

A modal window is open in the center, displaying the message "Your lead has been converted". It features a graphic of a flag on a mountain peak. Below the message, there are three cards: "ACCOUNT", "CONTACT", and "OPPORTUNITY".

- ACCOUNT:** Attitude Talent Agency. Type: , Phone: (851) 923-3824, Website: , Account Owner: Ogbonna Ngwu, Account Site: .
- CONTACT:** Chidi Seydou. Title: Social Media Intern, Account N... Attitude Talent A..., Phone: (851) 923-3824, Em... chidiseydou415@attitud..., Mobile: .
- OPPORTUNITY:** Attitude Talent Agency-Off... Account N... Attitude Talent A..., Close Date: 31/12/2022, Amount: , Opportunity O... Ogbonna N... .

At the bottom right of the modal, there are "New Task" and "Go to Leads" buttons. The main Salesforce interface shows a sidebar with "Activity" and "Upcoming & Overdue" sections, and a navigation bar at the bottom.

You have reached the end of Part B!

