



Welcome to Trailmix - 1

Accounts and Contacts



Hello everyone! Hopefully everyone has completed till Trailmix – 1 Salesforce CRM. If not go to this link, refer our previous resource PDFs and complete it.

Today we will complete the hands-on lab and quiz in Trailmix 1 – Accounts and Contacts. We will learn how to create and search through accounts and contacts of the Sales App.

URL for today's module:

https://trailhead.salesforce.com/content/learn/modules/accounts_contacts_lightning_experience?trailmix_creator_id=journeytosalesforce&trailmix_slug=trailmix-1

The screenshot shows the Trailmix 1 - Accounts and Contacts module. At the top, there's a summary card with the following details:

- +600 points
- Beginner
- Sales
- ~30 mins

Below the summary card are two lessons:

- Store Information About Your Customers** (~20 mins) - This lesson is highlighted with a red box.
- Understand Account and Contact Relationships** (~10 mins)

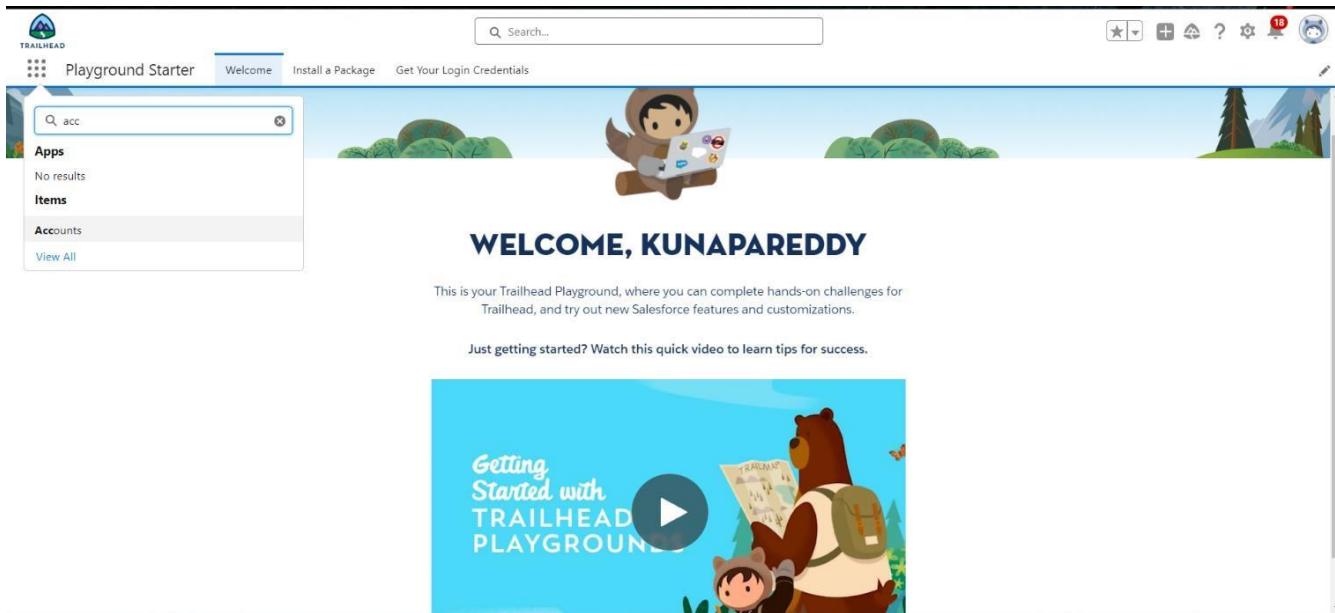
At the bottom of the module interface, there's a blue 'Start' button and a circular icon with a person and a document inside.

Open the lab and read through the content, this will provide an overview on what we will be doing next.

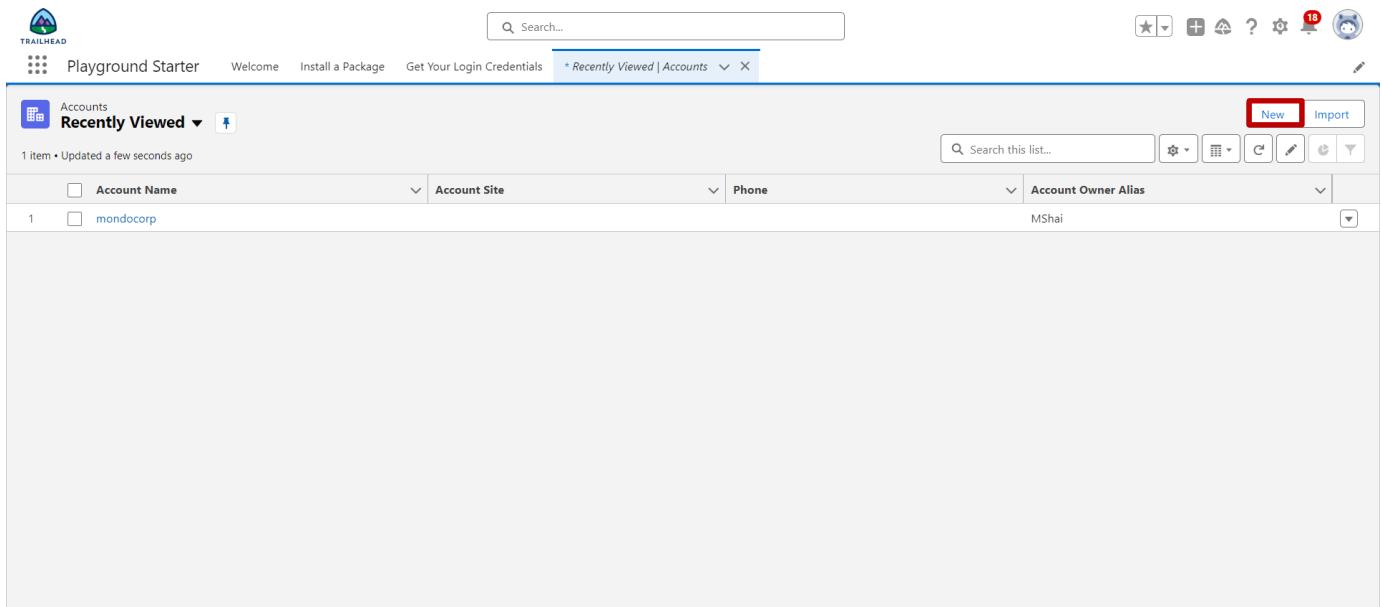
The screenshot shows the 'Add a contact to an account' challenge page. It includes the following sections:

- Add a contact to an account**
- Before You Start**: A note that if you didn't already add an account and contact for Get Cloudy, follow the instructions in this unit to do that now. Otherwise, you won't be able to complete this challenge.
- Steps**:
 - Create a contact:
 - Account: **Get Cloudy**
 - First Name: **Maria**
 - Last Name: **Clifton**
 - Title: **Regional Sales Manager**
- Bottom right corner**: A large red box highlights the 'Launch' button.

Click on the Apps icon in the top left, and type “Accounts”. Clicking on Accounts will open a new tab inside the lab.



In the Accounts tab, after completing the Salesforce CRM there will be previously created account .click on “New”



TASK 1: CREATE AN ACCOUNT

In the modal that opens up enter the following details and click on Save.

Name: Get Cloudy

The screenshot shows the 'New Account' modal in the Salesforce interface. The 'Account Information' section is displayed. The 'Account Name' field is populated with 'Get Cloudy'. The 'Save' button at the bottom right is highlighted with a red box.

You have now created a new account for the company with **account name Get Cloudy**. After entering the account name click on **Save**

TASK 2: CREATE A NEW CONTACT

The screenshot shows the Salesforce interface for the 'Playground Starter' account. The top navigation bar includes 'Search...', 'Follow', 'Edit', 'New Contact', and 'New Case'. The 'Accounts' and 'Contacts' tabs are visible. The main content area has sections for 'Type', 'Phone', 'Website', 'Account Owner' (set to 'Kunapareddy Bala Rajesh'), 'Account Site', and 'Industry'. Below these are 'Related' sections for 'Details' and 'News', both showing '0' items. The 'Contacts' section shows '0' contacts with a 'New' button. The 'Activity' section shows 'Chatter' with no upcoming activities.

In the modal that opens up fill the following details and hit save.

First Name: Maria

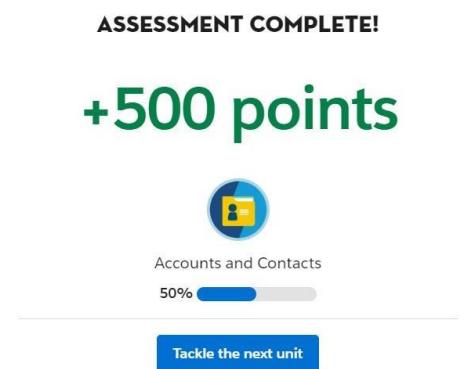
Last Name: Clifton

Account name will be already given

Title : Regional Sales Manager

The screenshot shows the 'Contact Information' modal in the Salesforce interface. The modal title is 'Contact Information' with a note '* = Required Information'. It contains fields for 'Contact Owner' (set to 'Kunapareddy Bala Rajesh'), 'Name' (with 'Salutation' set to 'Mrs.'), 'First Name' (set to 'Maria'), 'Last Name' (set to 'Clifton'), 'Account Name' (set to 'Get Cloudy'), 'Title' (set to 'Regional Sales Manager'), 'Department' (empty), and several phone number fields ('Phone', 'Home Phone', 'Mobile', 'Other Phone', 'Fax'). At the bottom are 'Cancel', 'Save & New', and a large blue 'Save' button highlighted with a red box. The background shows the Salesforce interface with the 'Playground Starter' account and the 'Contacts' tab selected.

Go back to the lab page and click on “Check Challenge” button and wait till it’s complete. Tomorrow we will focus on the next module **Accounts and Contacts**.



There is an another pdf for the quiz in the second section ,stay tuned.

Happy learning! 🌟

GFG KARE STUDENT CHAPTER ❤️