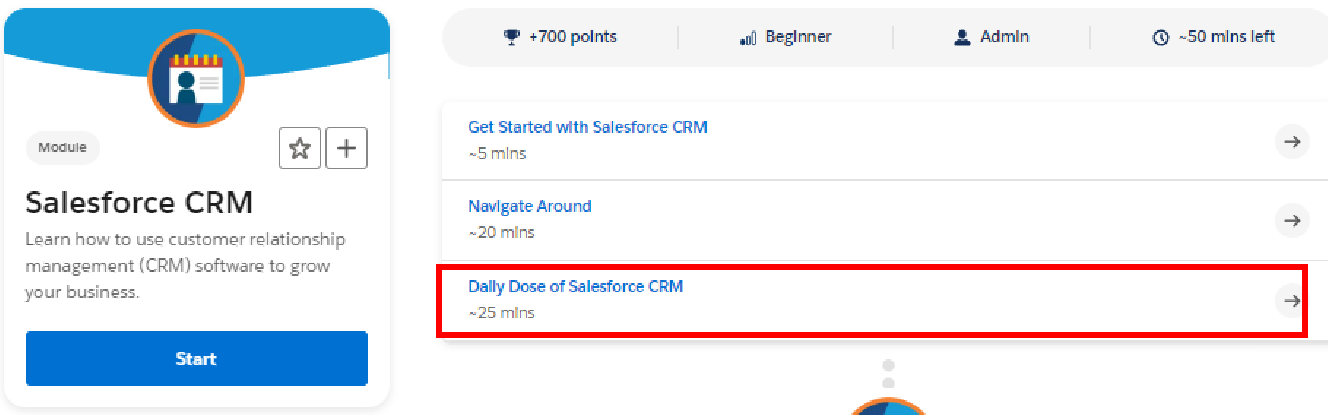
Welcome to Trailmix - 1

Salesforce CRM Hands-on Lab

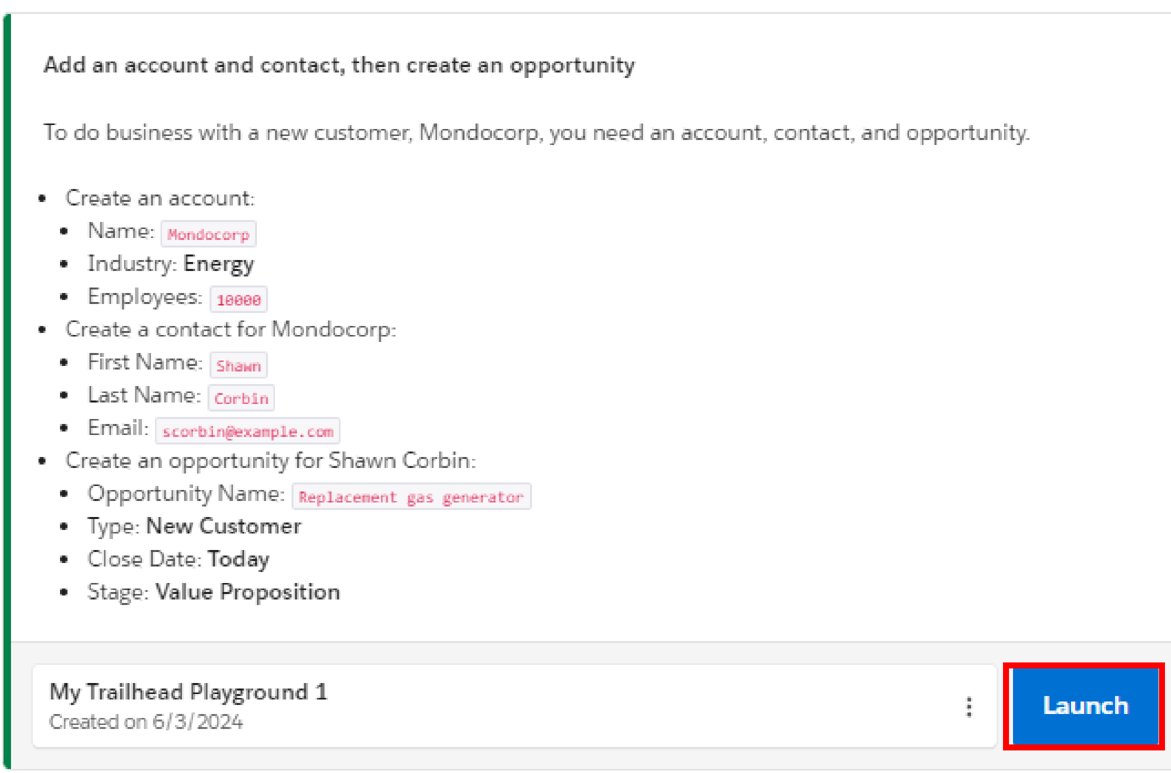
Hello everyone! Hopefully everyone has completed till Trailmix – 1 Salesforce CRM. If not go to this link, refer our previous resource PDFs and complete it.

Today we will complete the hands-on lab in Trailmix 1 - Salesforce CRM. We will learn how to create and search through accounts, contacts, and other common features of the Sales App.

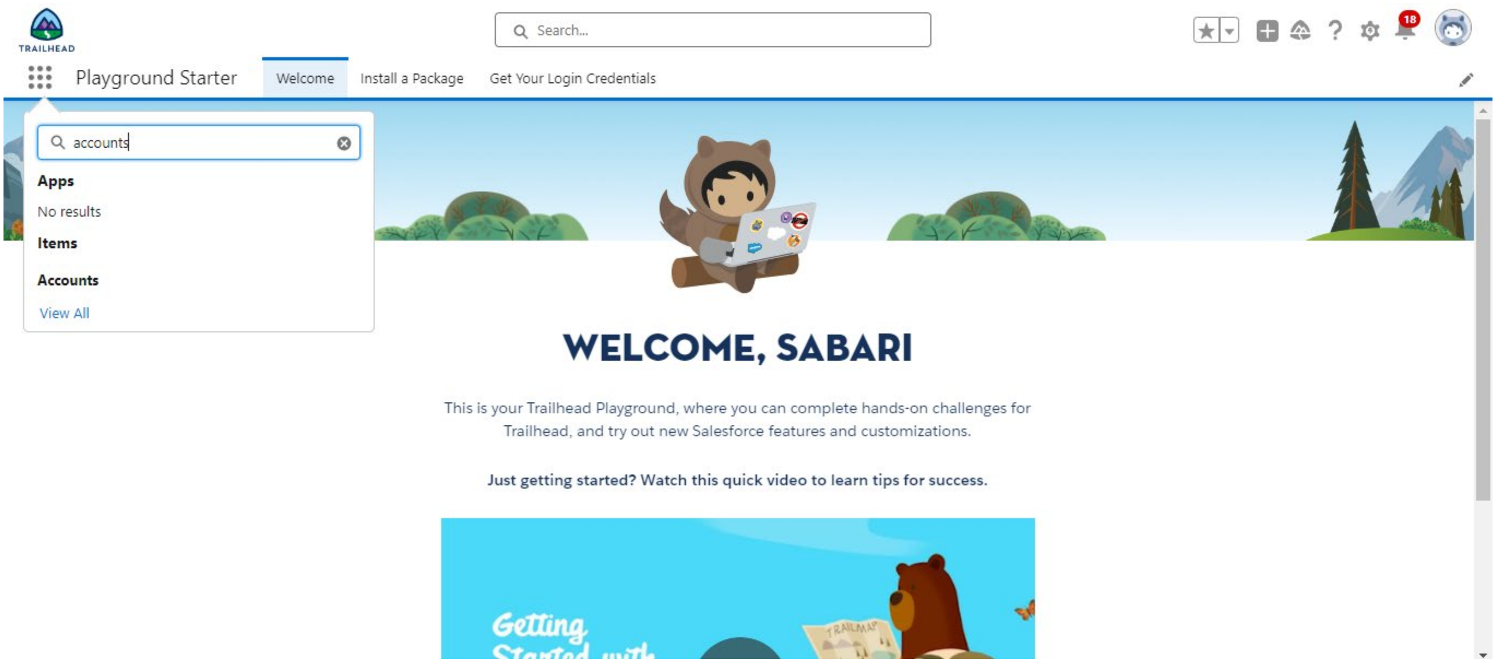
URL for today's module: https://trailhead.salesforce.com/content/learn/modules/lex_implementation_basics



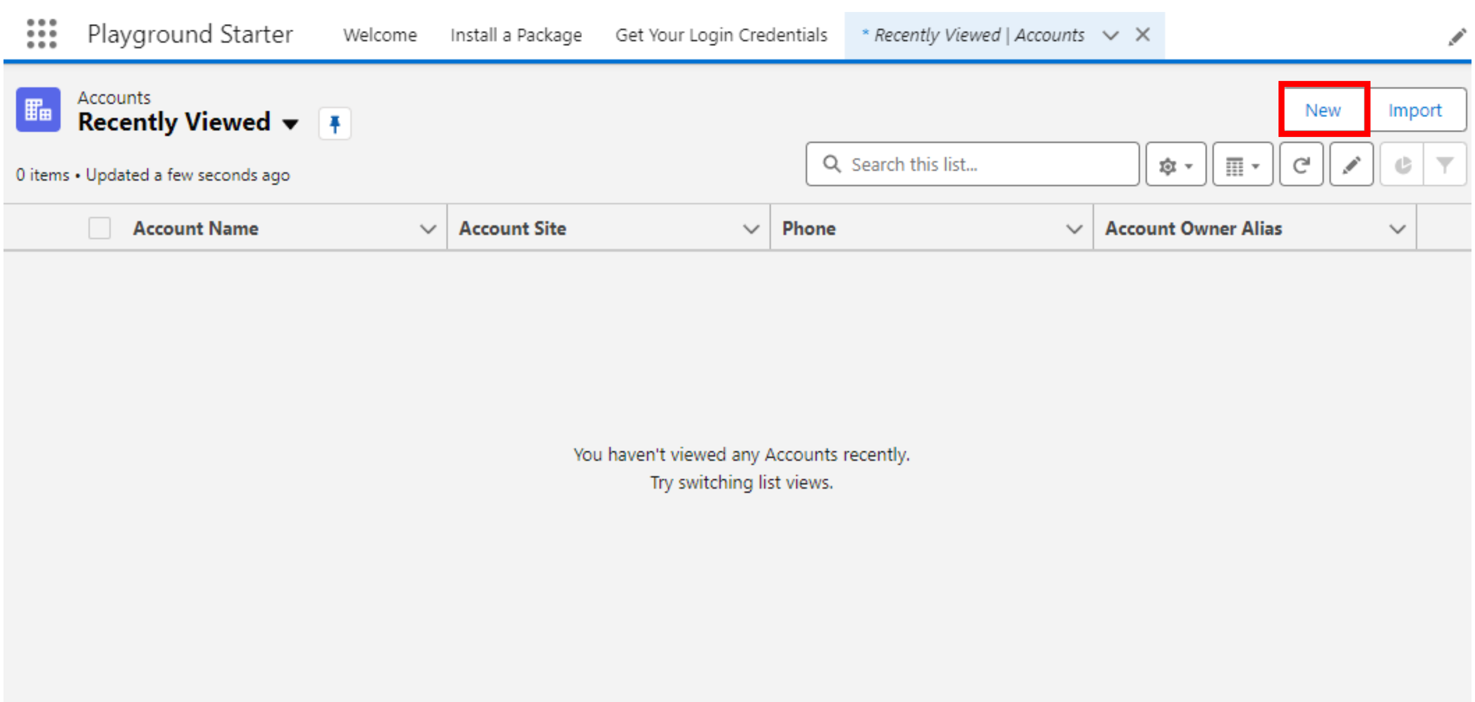
Open the lab and read through the content, this will provide an overview on what we will be doing next.



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, click on “New”



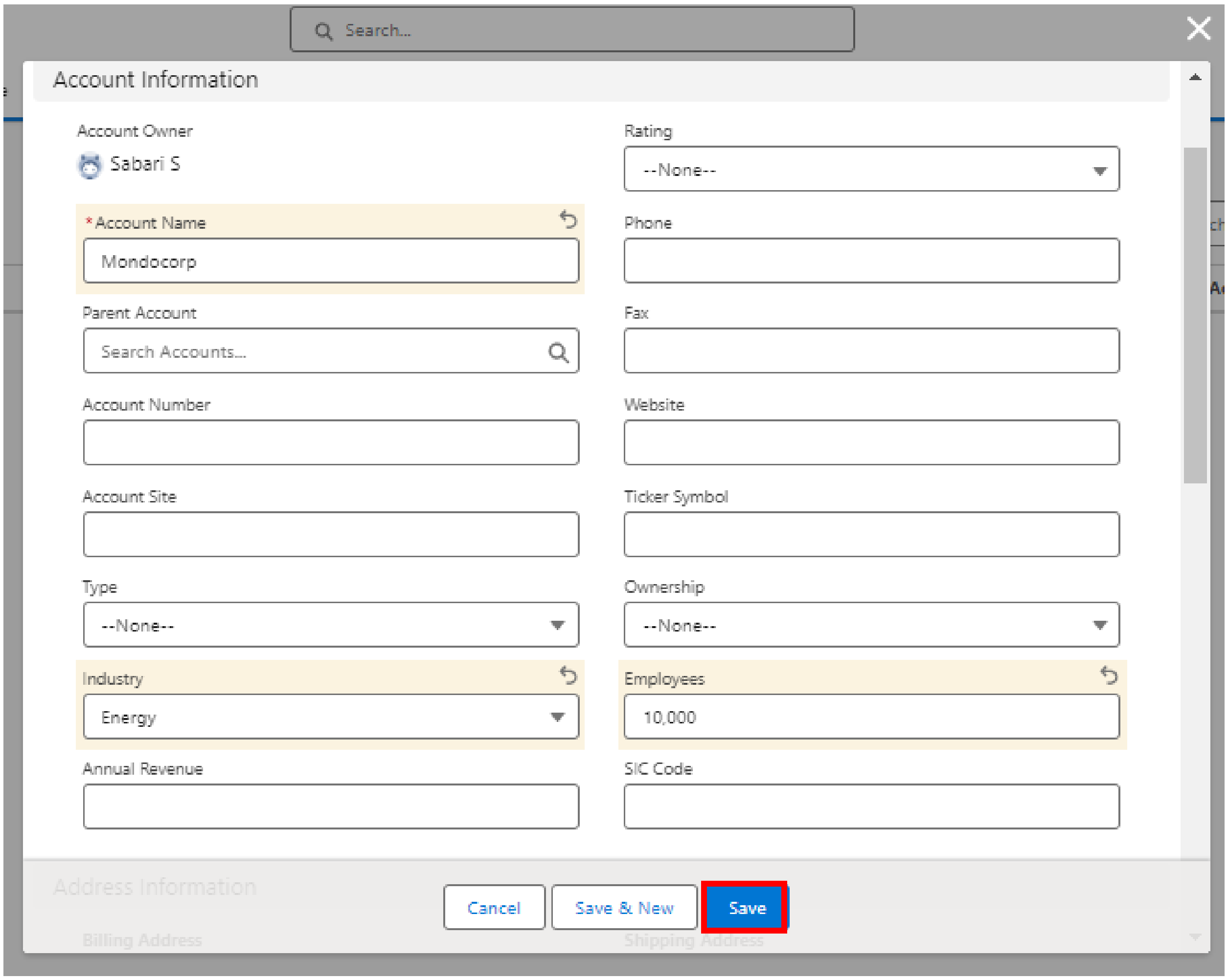
TASK 1: CREATE AN ACCOUNT

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

Name: Mondocorp

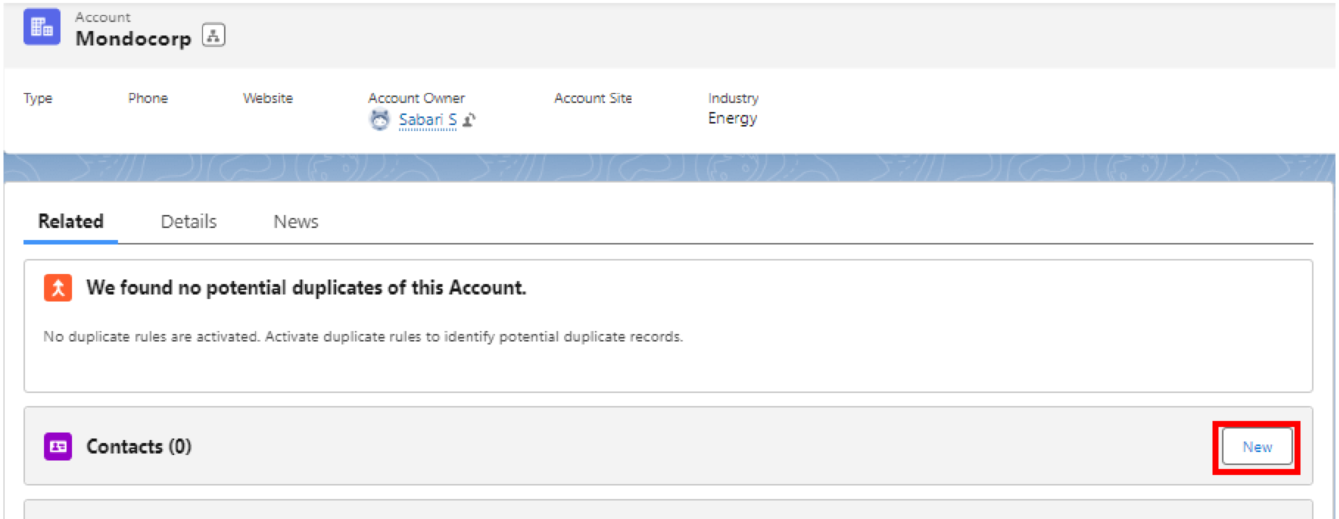
Industry: Energy

Employees: 10000



You have now created a new account for the company "MondoCorp". Once the account is created a **new tab will open** up containing information about the newly created company. We will now create a new contact in MondoCorp.

TASK 2: CREATE A NEW CONTACT

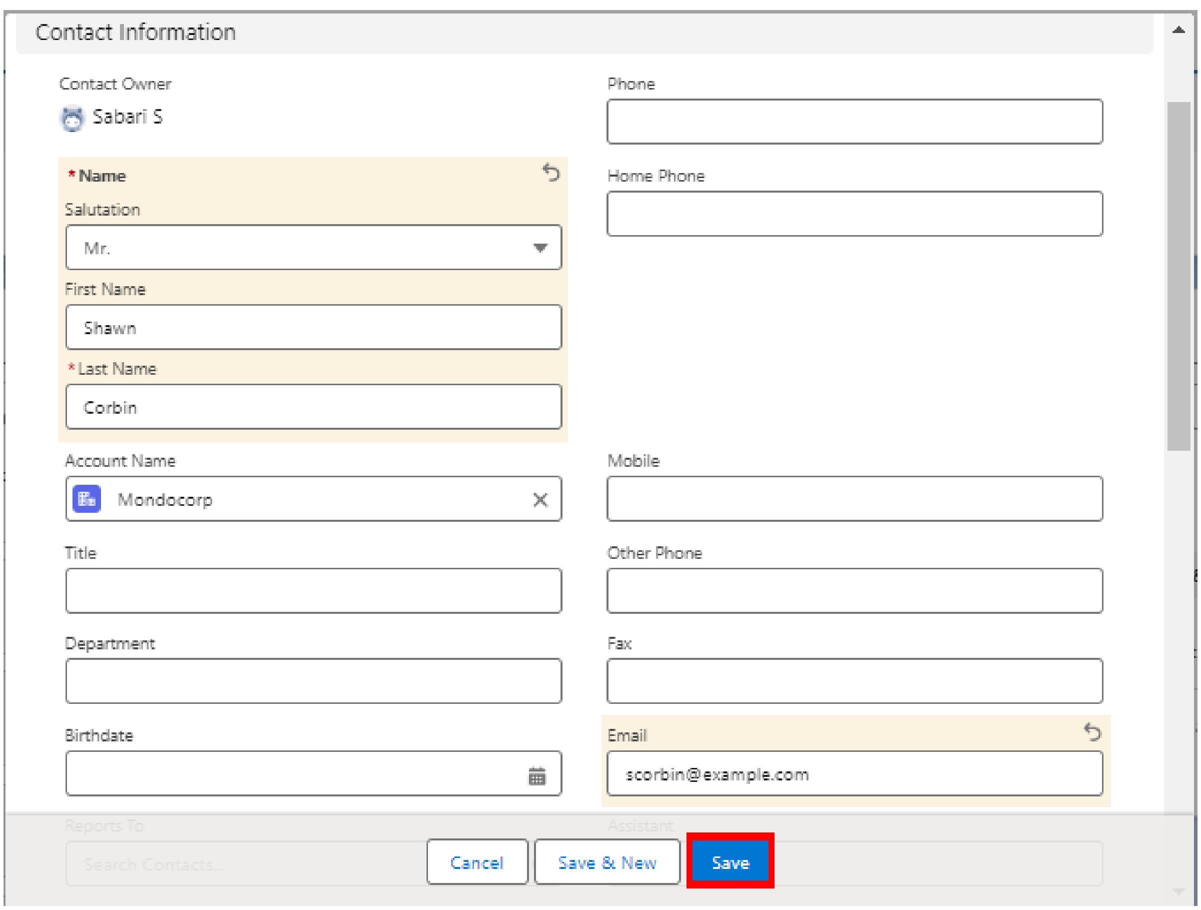


In the modal that opens up fill the following details and hit save.

First Name: Shawn

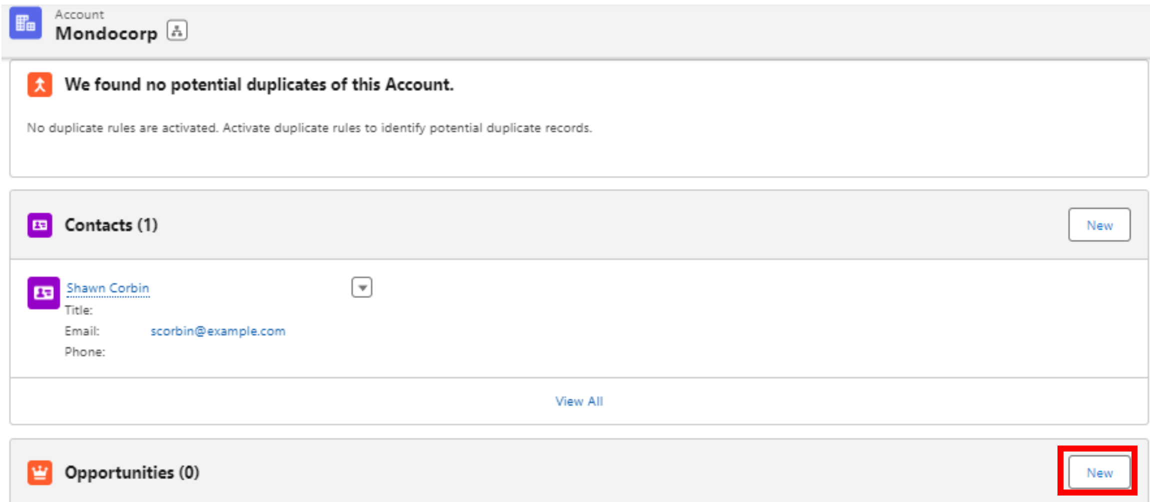
Last Name: Corbin

Email: scorbin@example.com



TASK 3: CREATE AN OPPORTUNITY

Below the newly created contact, you will see the opportunities panel, click on New to create a new opportunity.



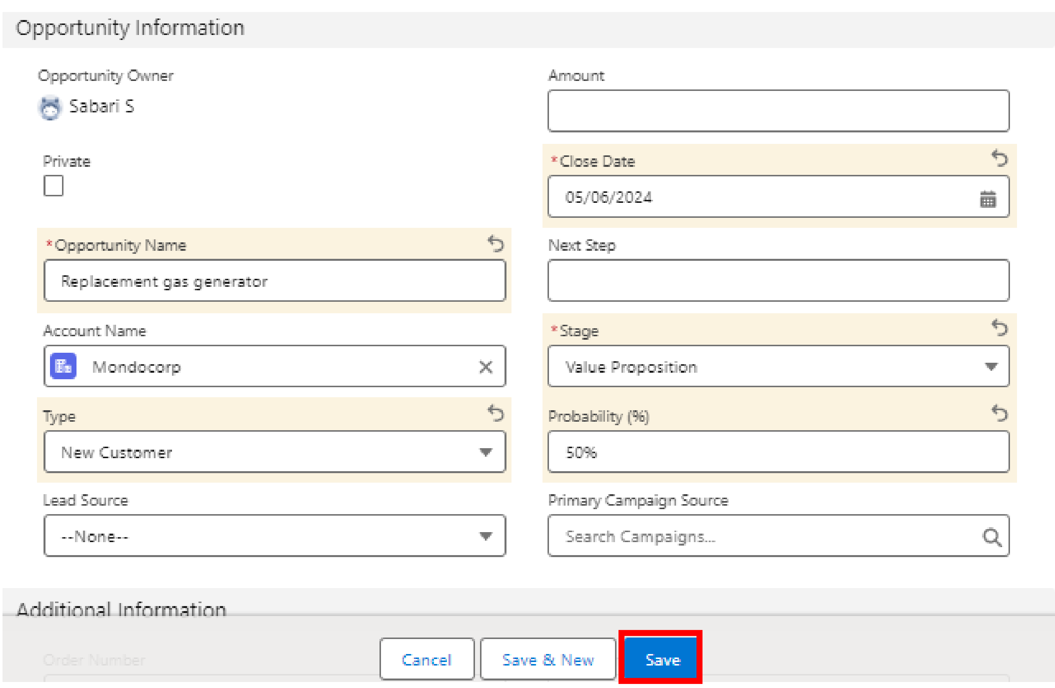
Fill the following details and hit Save.

Opportunity Name: Replacement gas generator

Type: New Customer

Close Date: Today

Stage: Value Proposition



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**.

Happy learning! ✨

GFG KARE STUDENT CHAPTER 💚