



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

Module

Salesforce CRM

Learn how to use customer relationship management (CRM) software to grow your business.

Start

+700 points | Beginner | Admin | ~50 mins left

- Get Started with Salesforce CRM
~5 mins
- Navigate Around
~20 mins
- Daily Dose of Salesforce CRM**
~25 mins

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

Add an account and contact, then create an opportunity

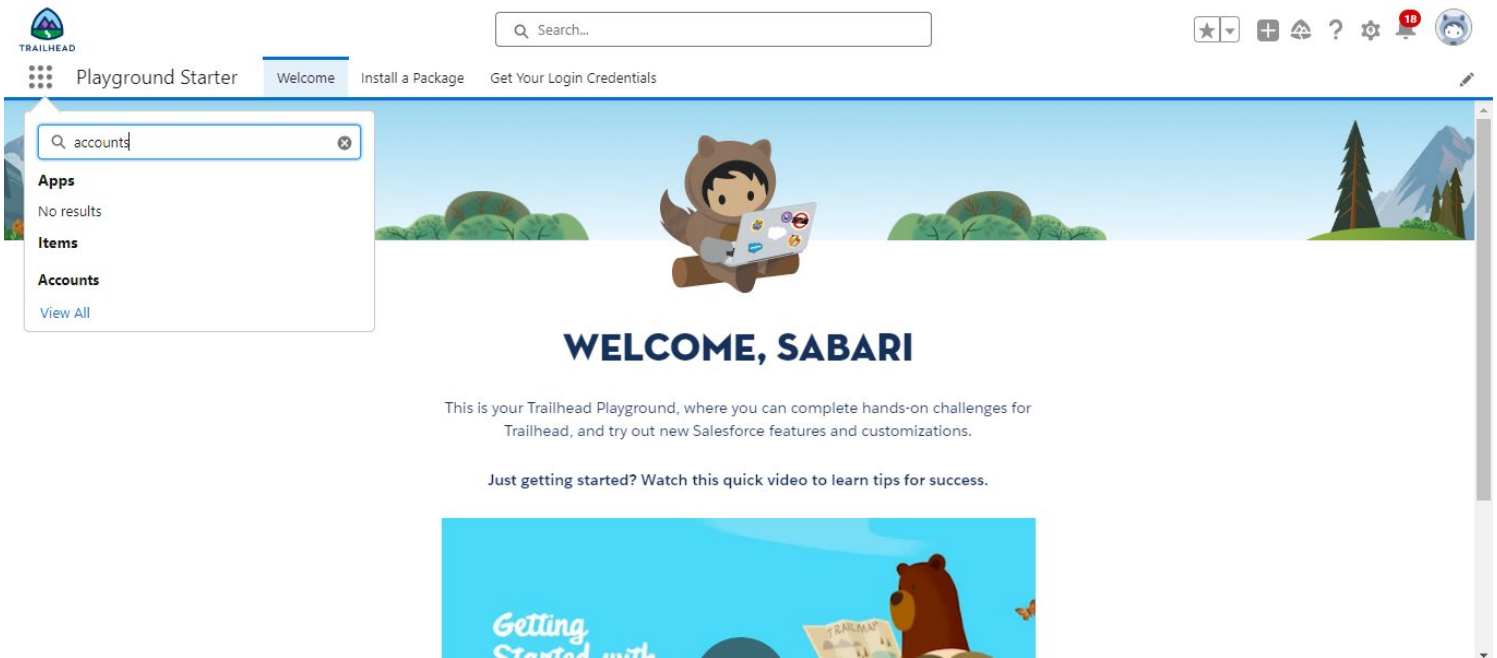
To do business with a new customer, Mondocorp, you need an account, contact, and opportunity.

- Create an account:
 - Name: **Mondocorp**
 - Industry: **Energy**
 - Employees: **10000**
- Create a contact for Mondocorp:
 - First Name: **Shawn**
 - Last Name: **Corbin**
 - Email: **scorbin@example.com**
- Create an opportunity for Shawn Corbin:
 - Opportunity Name: **Replacement gas generator**
 - Type: **New Customer**
 - Close Date: **Today**
 - Stage: **Value Proposition**

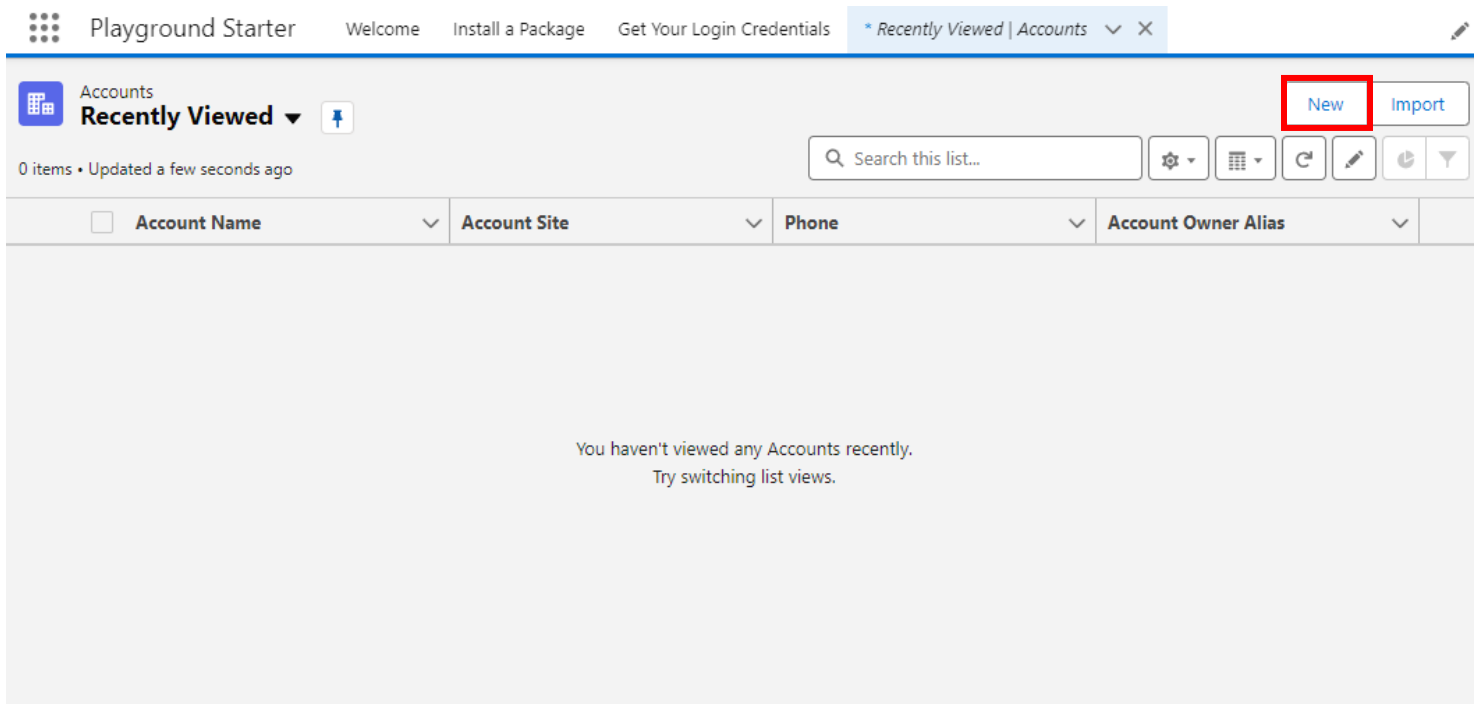
My Trailhead Playground 1
Created on 6/3/2024

Launch

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”



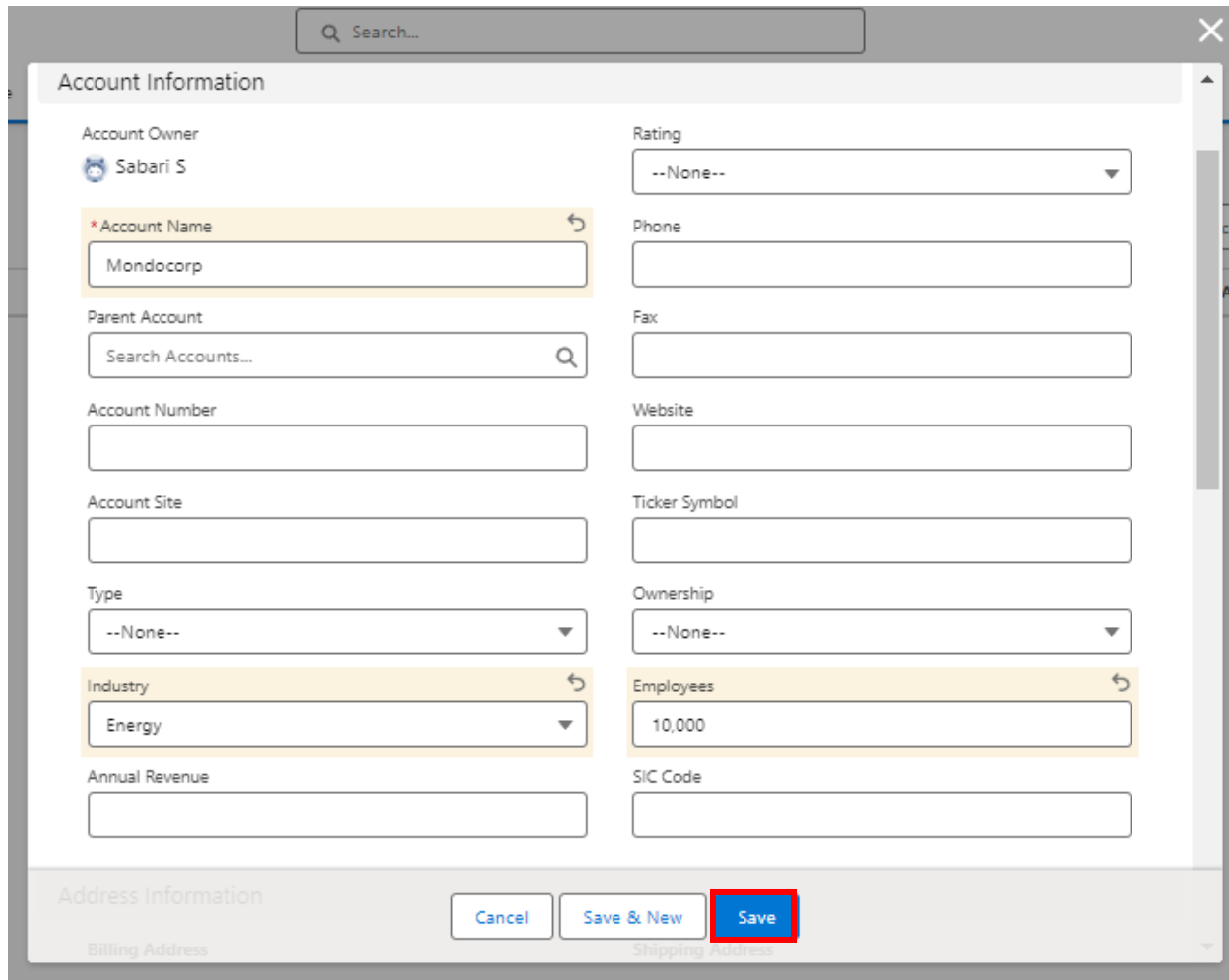
TASK 1: CREATE AN ACCOUNT

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

Name: Mondocorp

Industry: Energy

Employees: 10000



The screenshot shows a modal window titled "Account Information" with a search bar at the top. The form contains the following fields:

- Account Owner: Sabari S (with a user icon)
- Rating: --None-- (dropdown menu)
- *Account Name: Mondocorp (text input, highlighted with a yellow background)
- Phone: (text input)
- Parent Account: Search Accounts... (text input with a search icon)
- Fax: (text input)
- Account Number: (text input)
- Website: (text input)
- Account Site: (text input)
- Ticker Symbol: (text input)
- Type: --None-- (dropdown menu)
- Ownership: --None-- (dropdown menu)
- Industry: Energy (dropdown menu, highlighted with a yellow background)
- Employees: 10,000 (text input, highlighted with a yellow background)
- Annual Revenue: (text input)
- SIC Code: (text input)

At the bottom of the modal, there are three buttons: "Cancel", "Save & New", and "Save". The "Save" button is highlighted with a red border. Below the buttons, there are sections for "Address Information" (Billing Address and Shipping Address) which are currently collapsed.

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

The screenshot shows the Mondocorp account page. At the top, there's a header with the Mondocorp logo and a user profile for Sabari S. Below the header, there are tabs for 'Type', 'Phone', 'Website', 'Account Owner', 'Account Site', and 'Industry'. The 'Account Owner' tab is selected, showing 'Sabari S'. Below this, there's a 'Related' tab selected, showing a message: 'We found no potential duplicates of this Account. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.' Below this message, there's a 'Contacts (0)' section with a 'New' button highlighted in a red box.

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

First Name: Shawn

Last Name: Corbin

Email: scorbin@example.com

The screenshot shows the 'Contact Information' modal form. It has a 'Contact Owner' field with 'Sabari S'. Below this, there's a 'Name' section with a 'Salutation' dropdown (set to 'Mr.') and 'First Name' and 'Last Name' text boxes (filled with 'Shawn' and 'Corbin' respectively). Below the name section, there's an 'Account Name' field with 'Mondocorp'. Below this, there are 'Title', 'Department', and 'Birthdate' fields. To the right of these, there are 'Phone', 'Home Phone', 'Mobile', 'Other Phone', and 'Fax' fields. At the bottom right, there's an 'Email' field filled with 'scorbin@example.com'. At the bottom of the modal, there are 'Cancel', 'Save & New', and 'Save' buttons, with the 'Save' button highlighted in a red box.

TASK 3: CREATE AN OPPORTUNITY

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

Account
Mondocorp

We found no potential duplicates of this Account.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Contacts (1) [New](#)

Shawn Corbin
Title:
Email: scorbin@example.com
Phone:
[View All](#)

Opportunities (0) [New](#)

Fill the following details and hit Save.

Opportunity Name: Replacement gas generator

Type: New Customer

Close Date: Today

Stage: Value Proposition

Opportunity Information

Opportunity Owner
 Sabari S

Amount

Private
☐

* Opportunity Name

Account Name
 Mondocorp

Type

Lead Source

* Close Date

Next Step

* Stage

Probability (%)

Primary Campaign Source

Additional Information

Order Number

[Cancel](#) [Save & New](#) [Save](#)

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! ✨