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**Email : mriganka.patra@cognizant.com**

**Day 10**

**Assignment 1:**

Salesforce – Opportunities, Sales Path and Full Sales Cycle

Objective:

Learn to manage Opportunities, Configure Sales Path, and Demonstrate the Complete Sales Cycle within Salesforce.

Tasks:

1. Create a new Opportunity and Walk through the default stages: Prospecting to Closed Won / Lost
2. Add products to the Opportunity from a Pricebook:

* Include a least 2 different Products with quantities and discounts

1. Customize a Sales Path for Opportunities:

* Define key fields and guidance for each stage.

1. Simulate a full Sales Cycle:

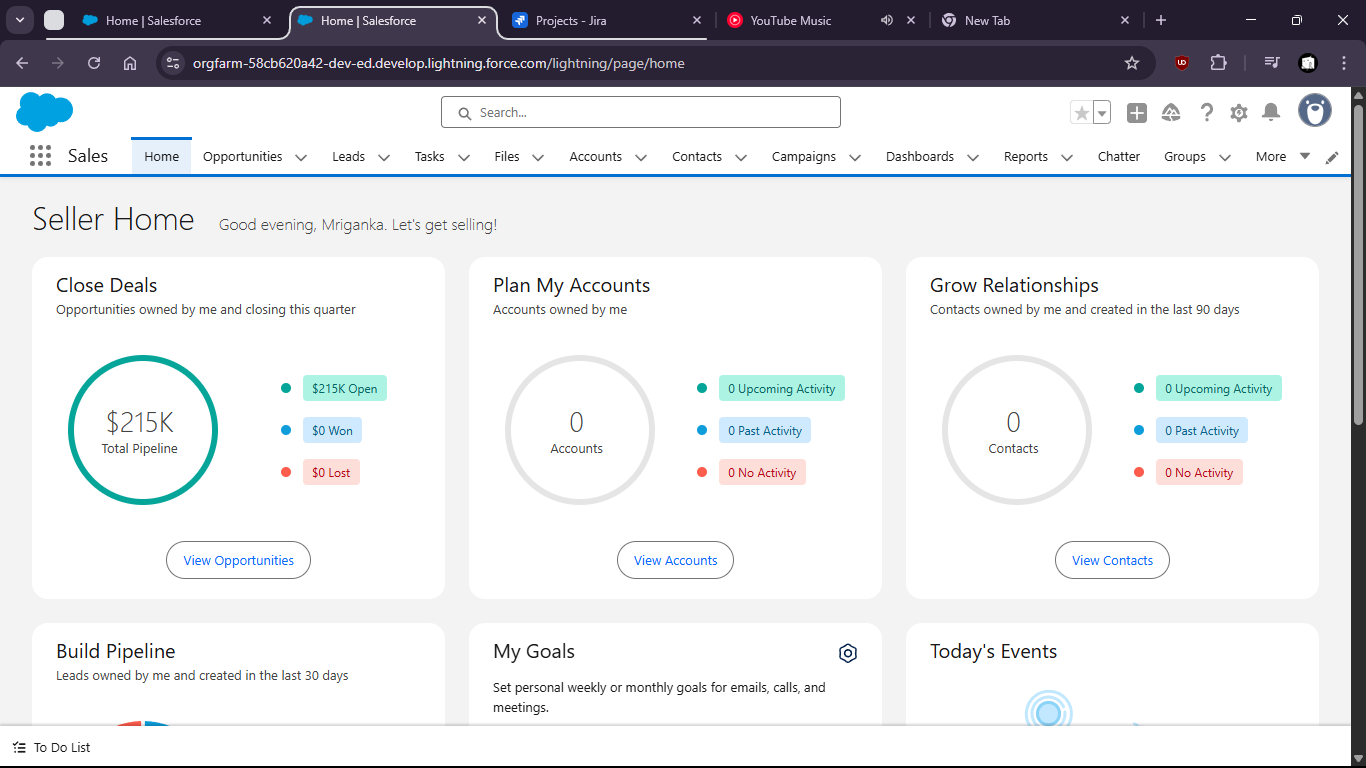
* Convert a Lead – Create an Account & Contact – Create an Opportunity – Add Products – Close Opportunity

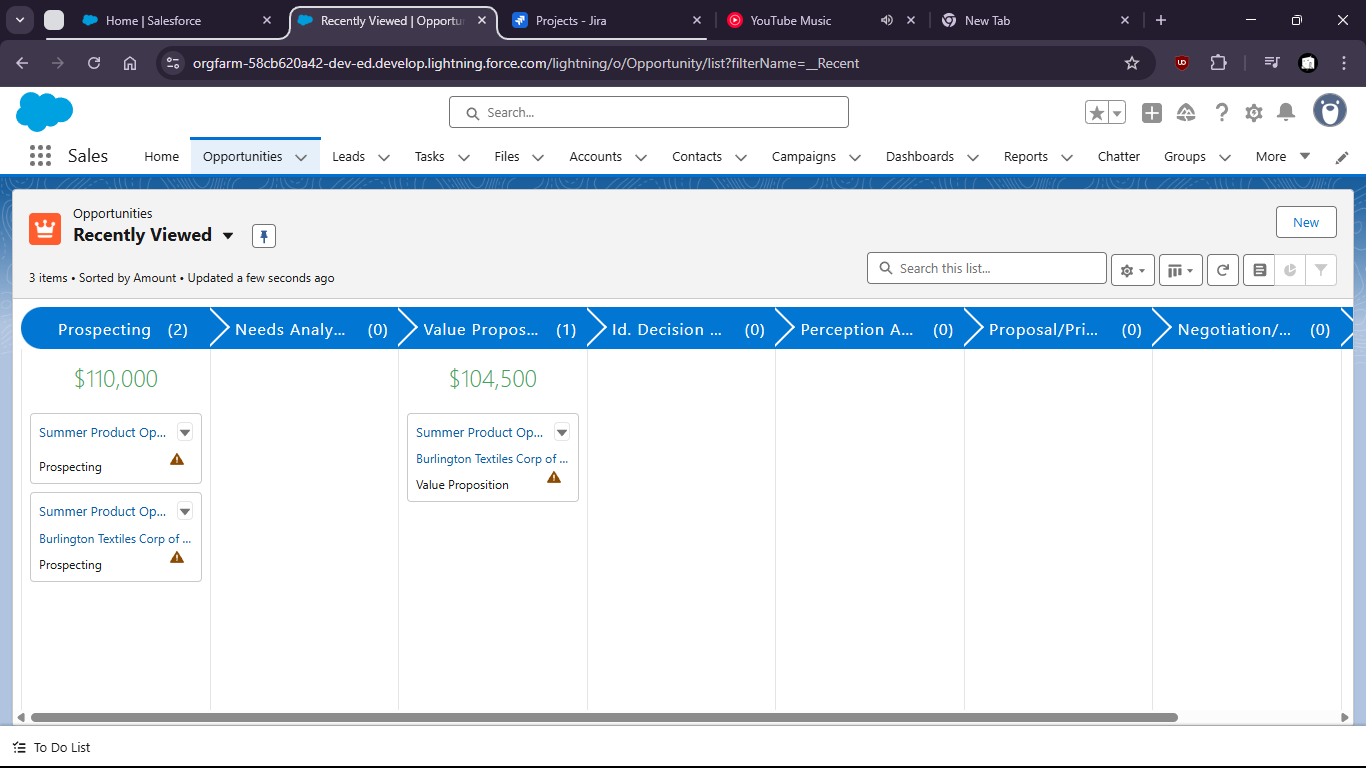
1. Use Activity Timeline to log a call , schedule a task, and send an email from the Opportunity record

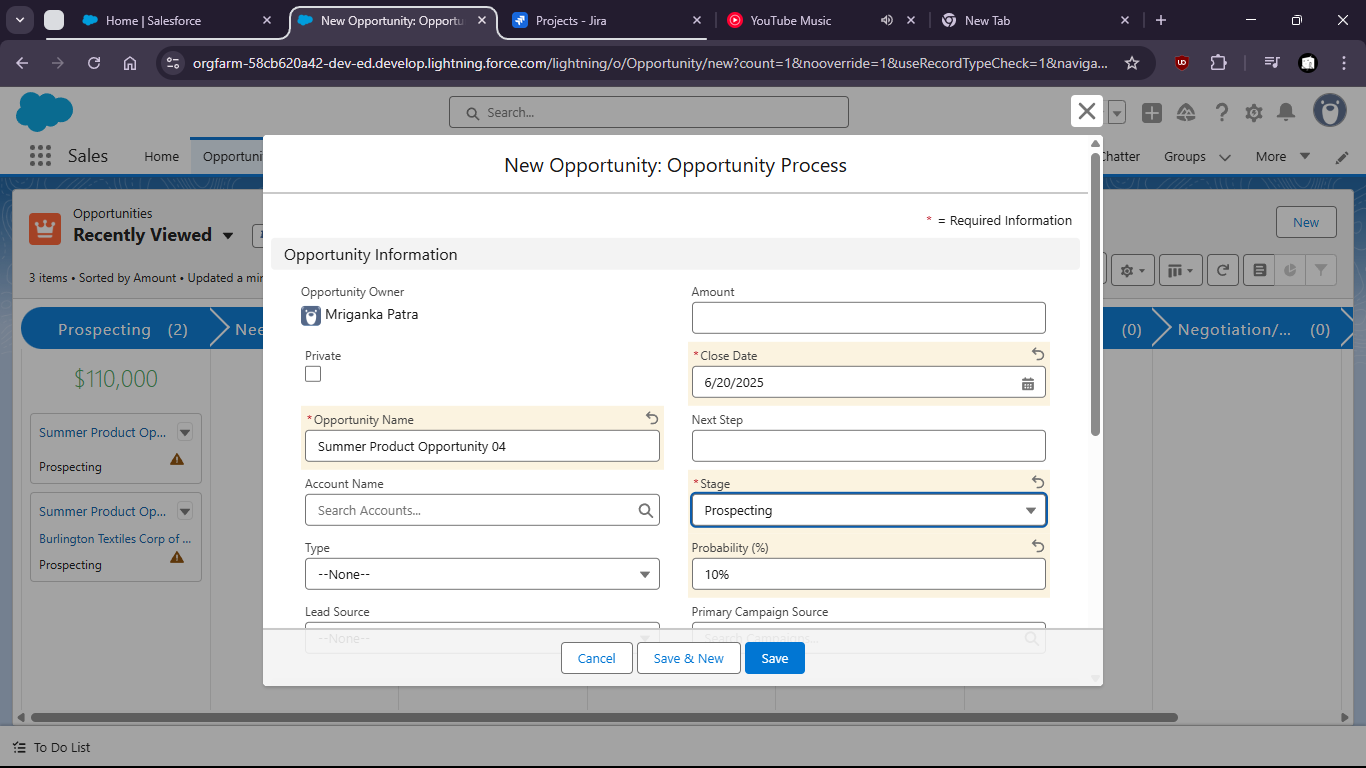
Deliverables:

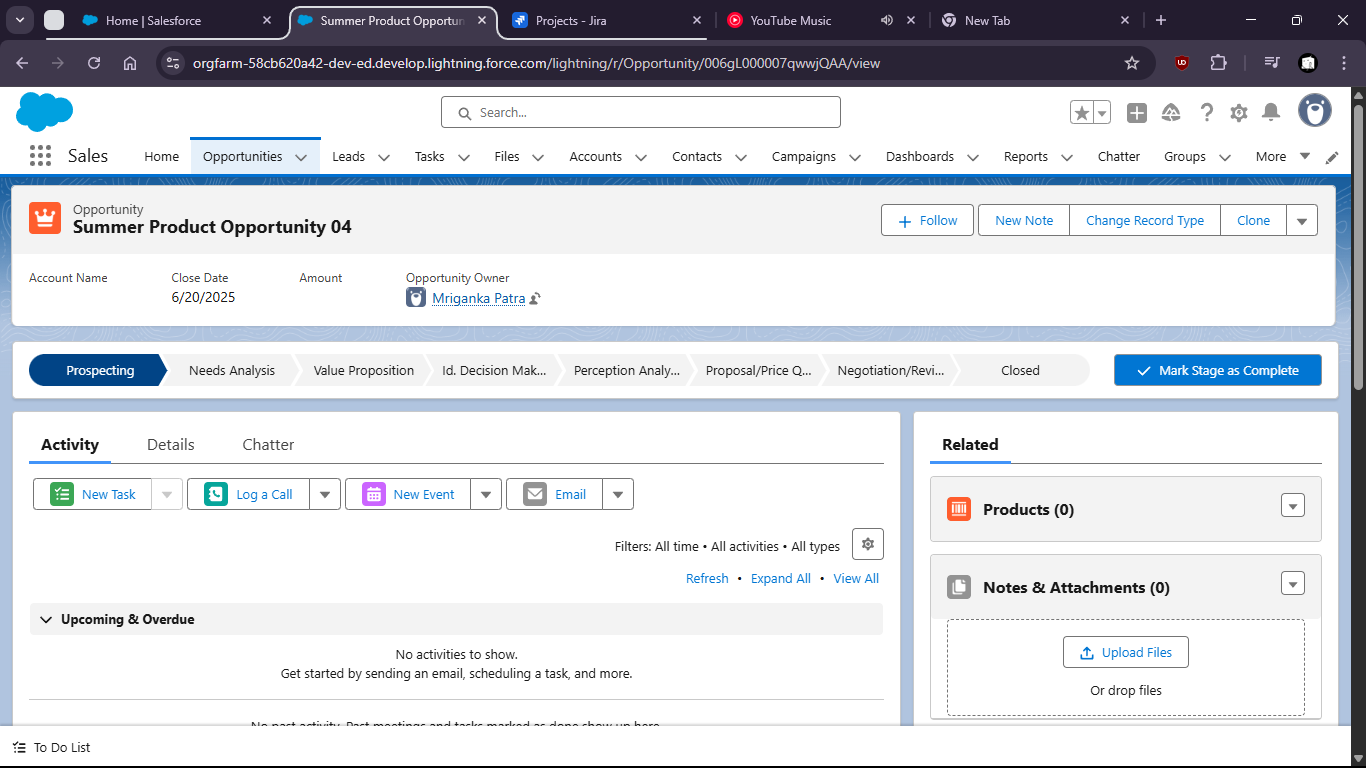
* Screenshots or Configuration of Opportunity stages and Sales Path
* Product details within the Opportunity
* Demonstration of complete sales cycle steps

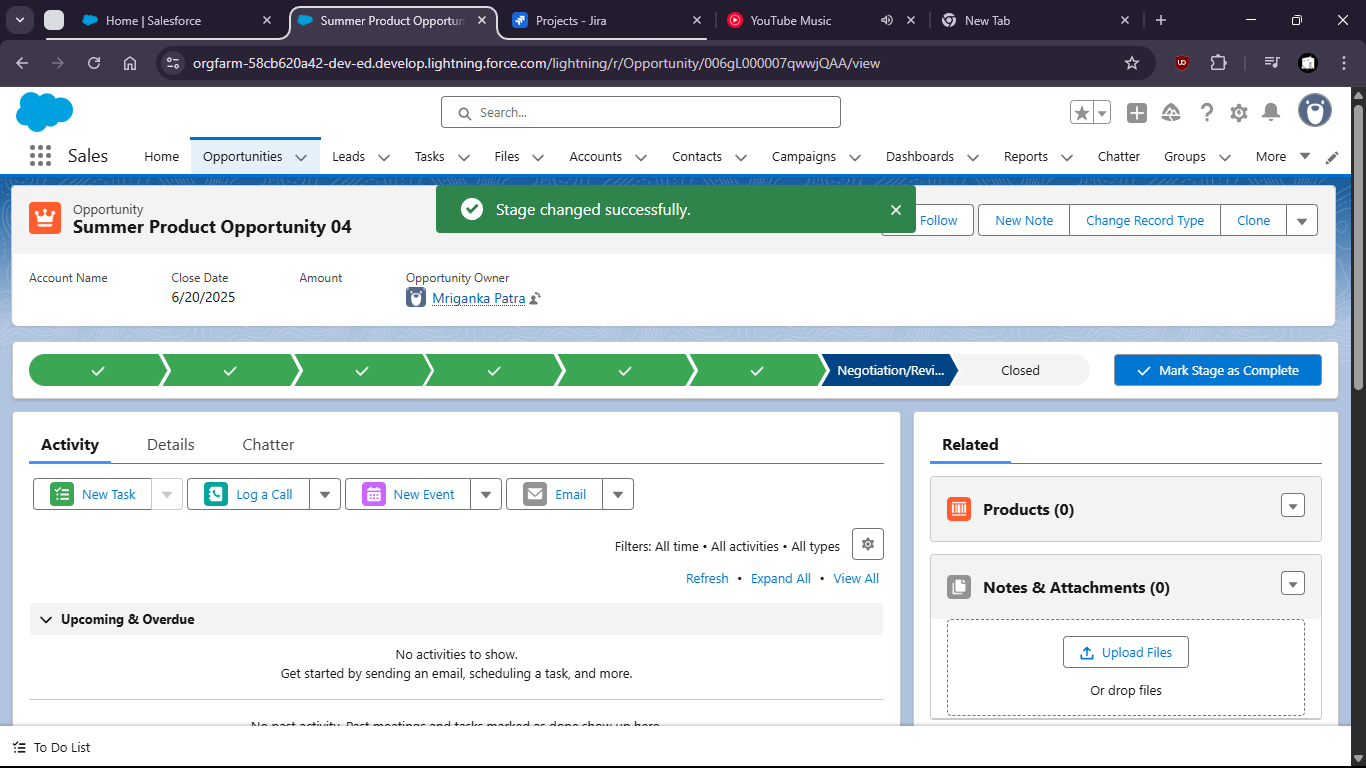
Task 1:Create a new Opportunity and Walk through the default stages: Prospecting to Closed Won / Lost

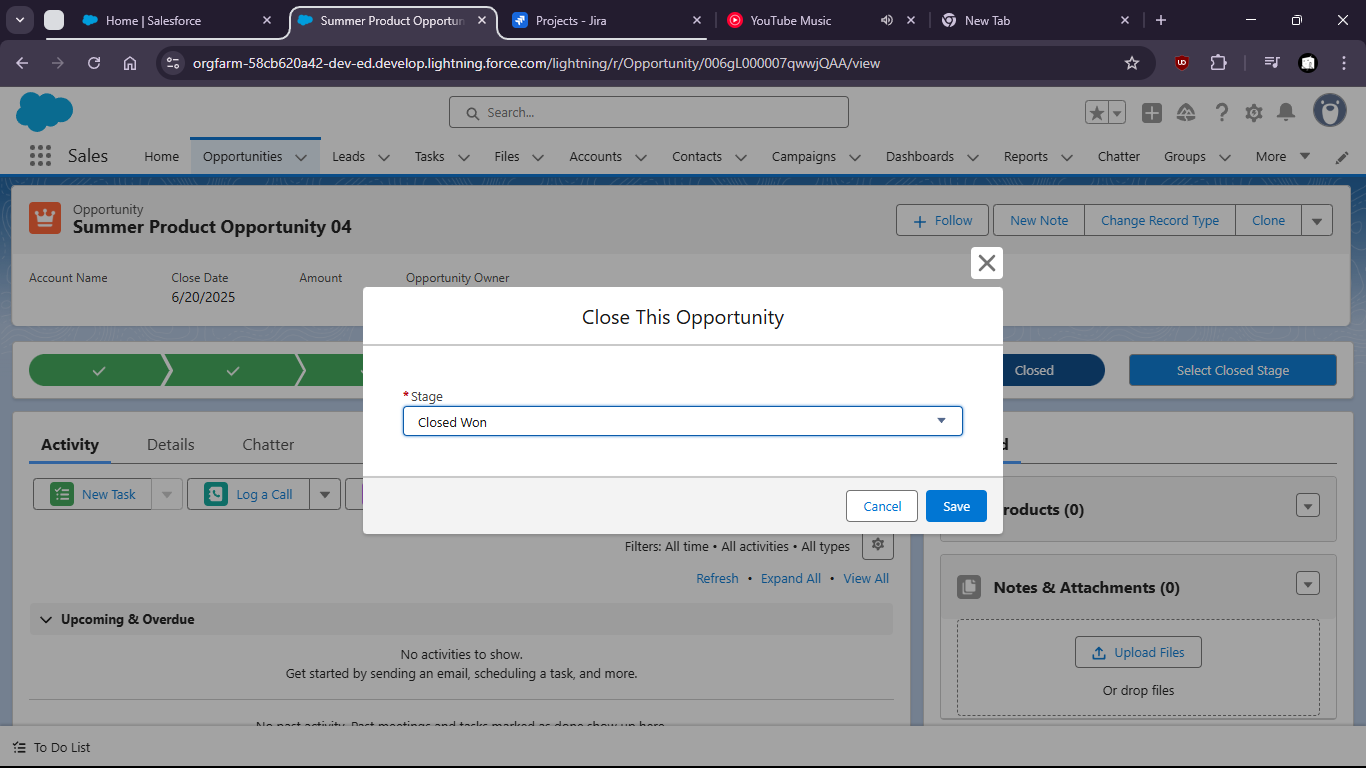


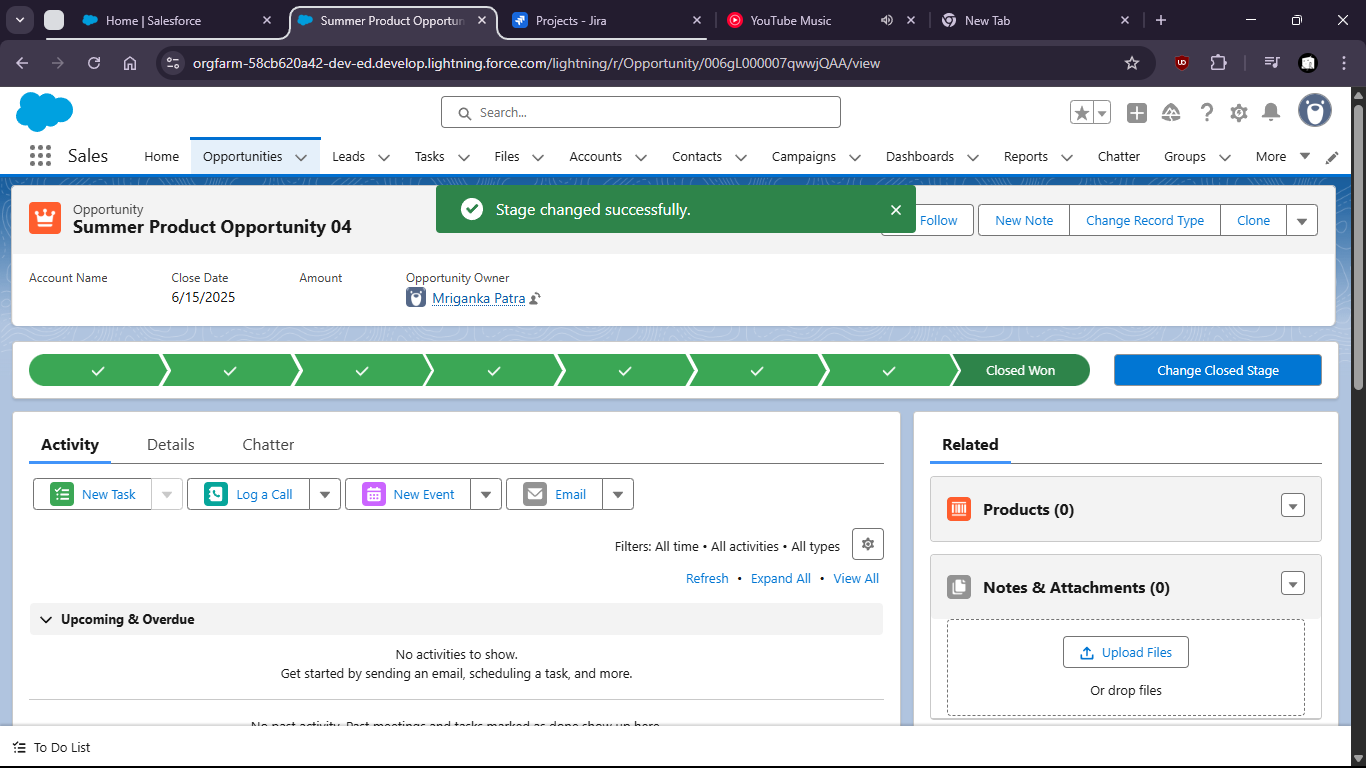






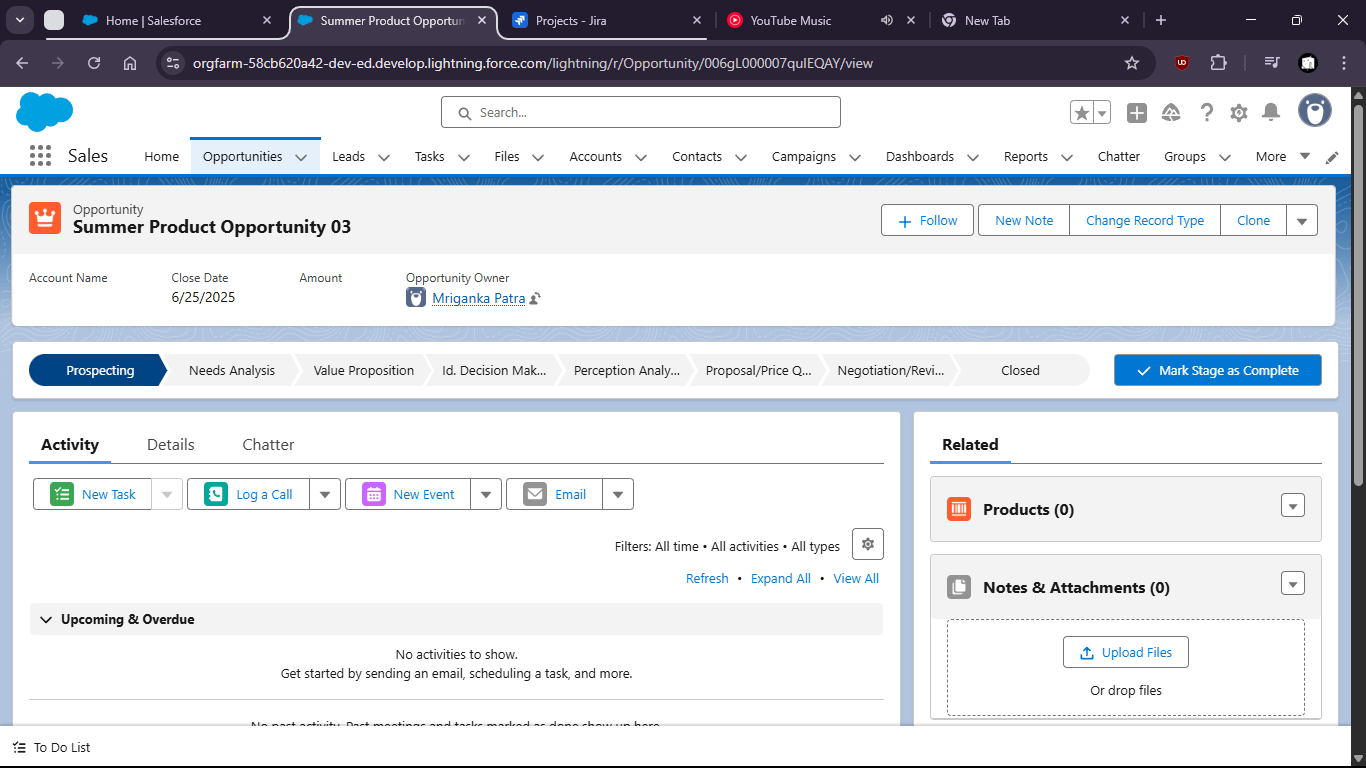


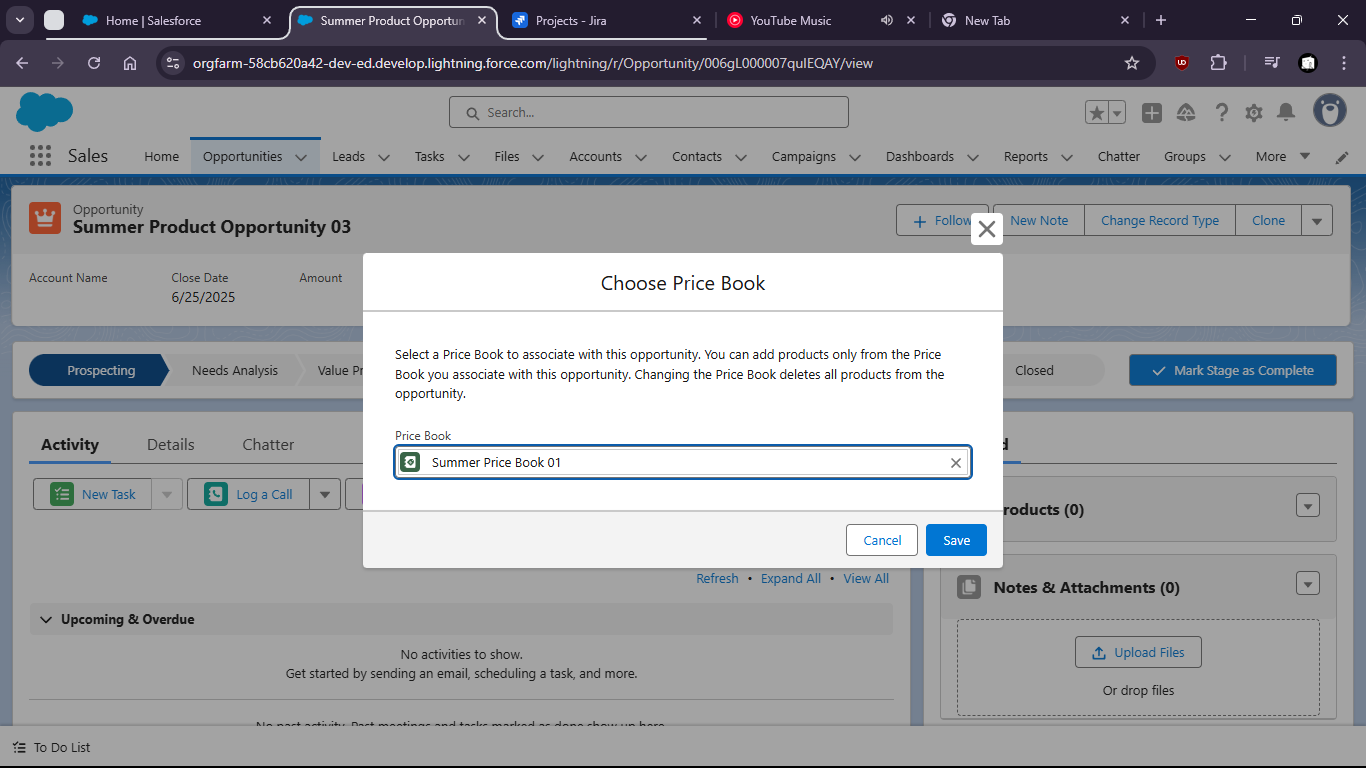


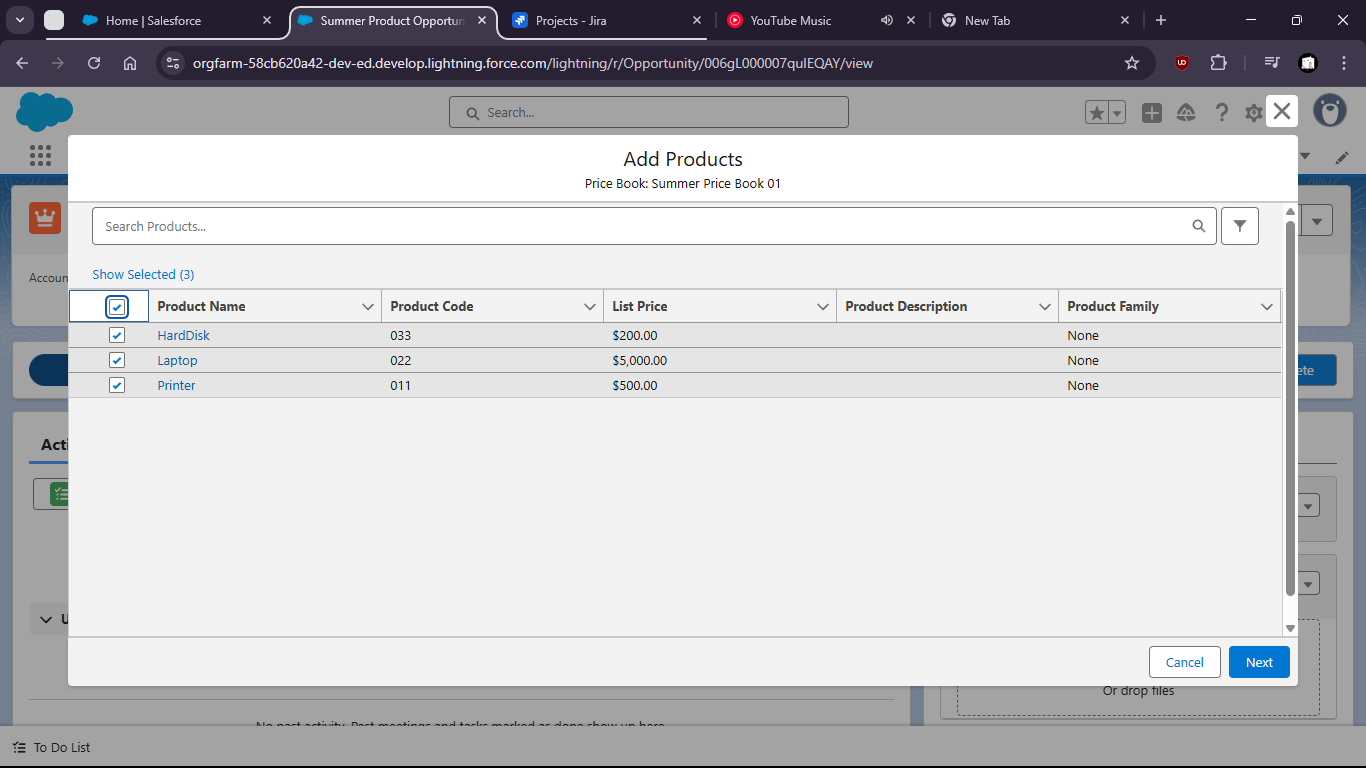


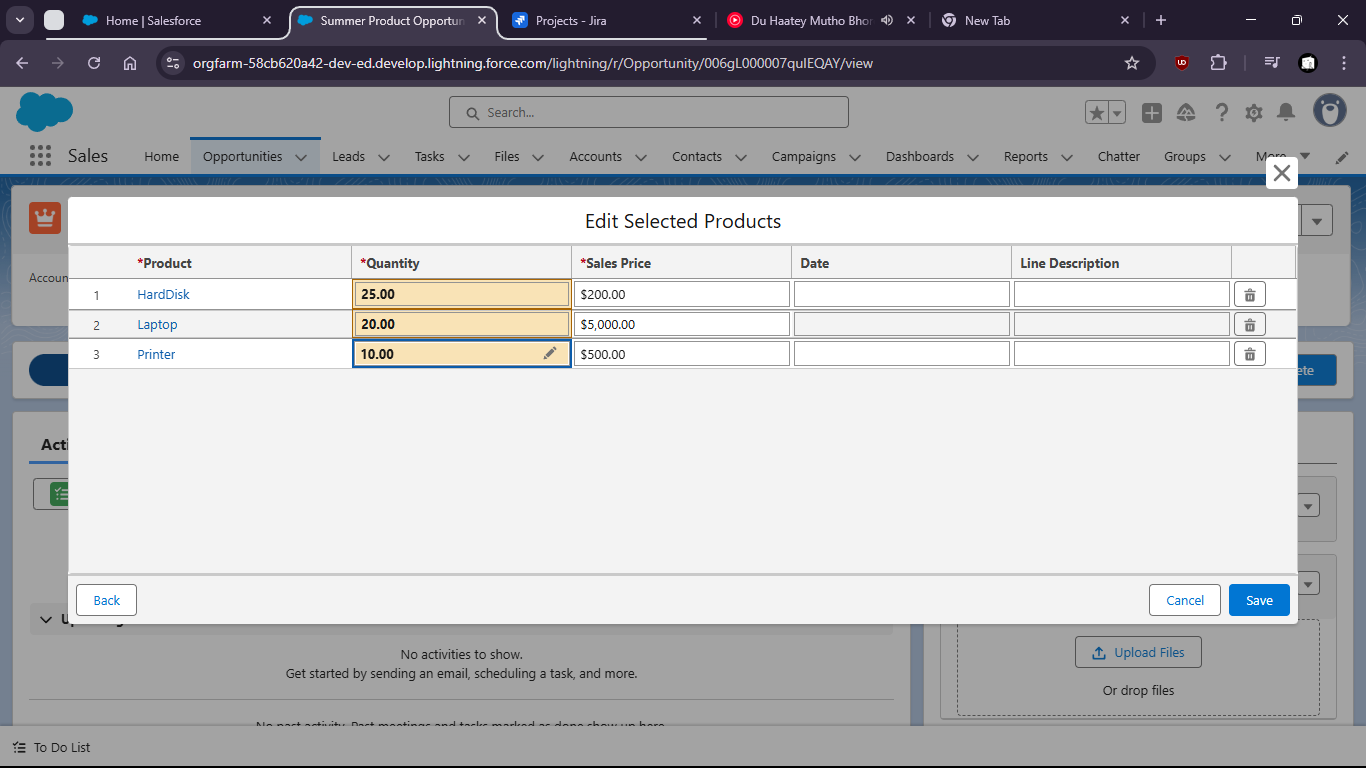
Task 2:Add products to the Opportunity from a Pricebook:

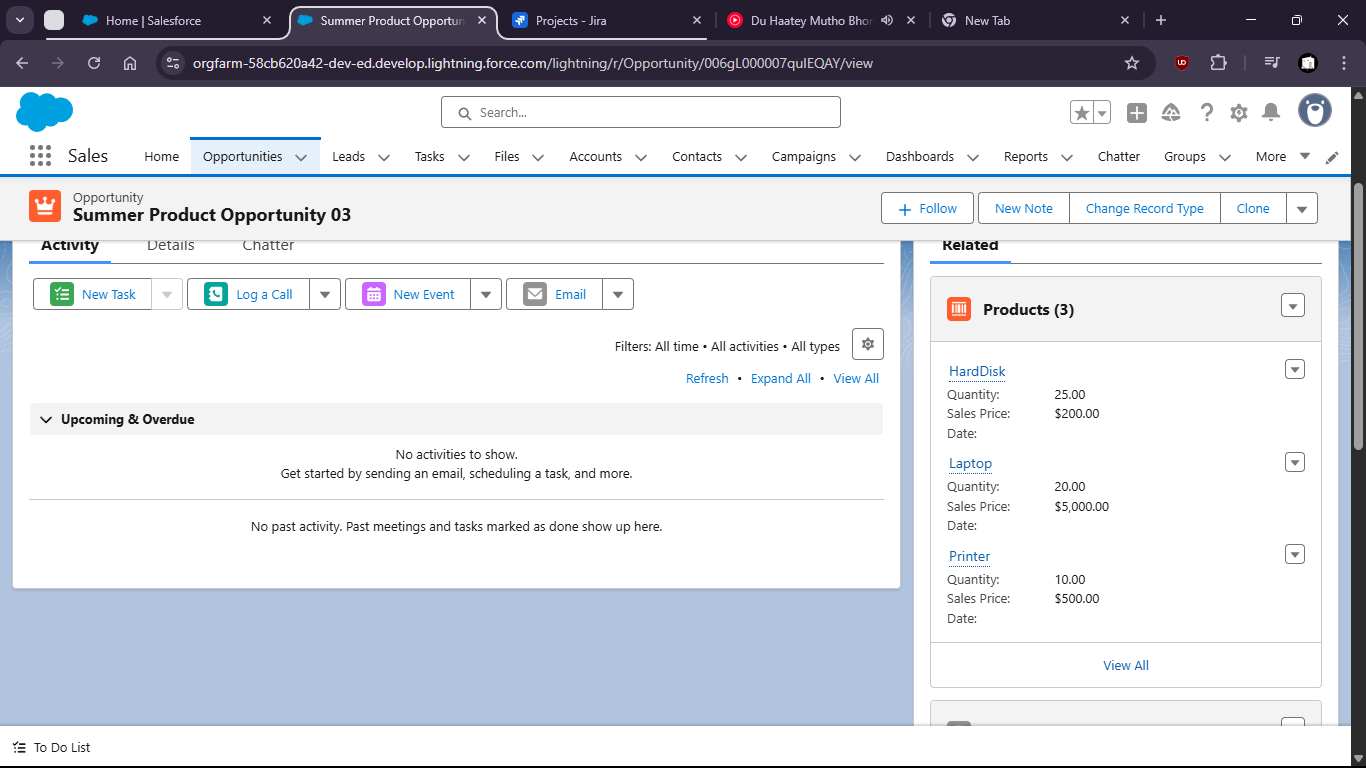
Include a least 2 different Products with quantities and discounts

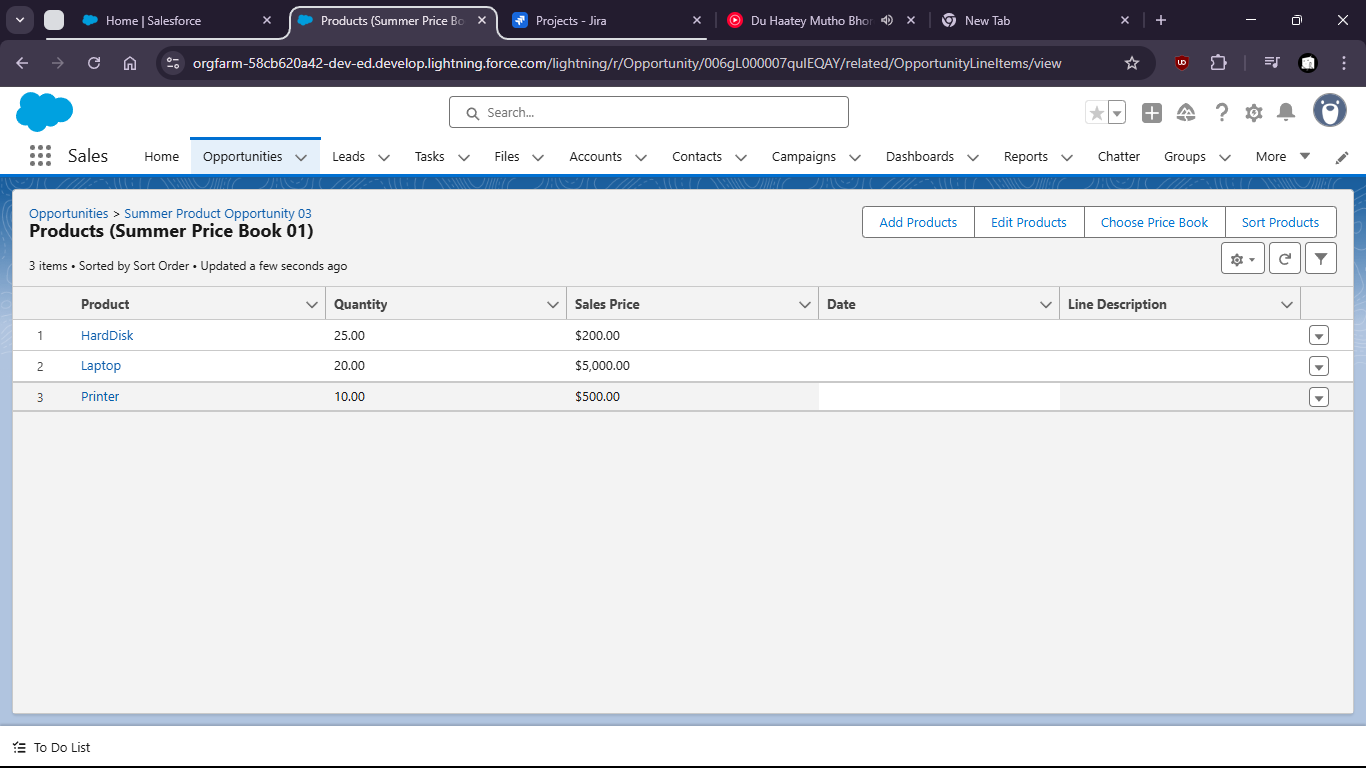






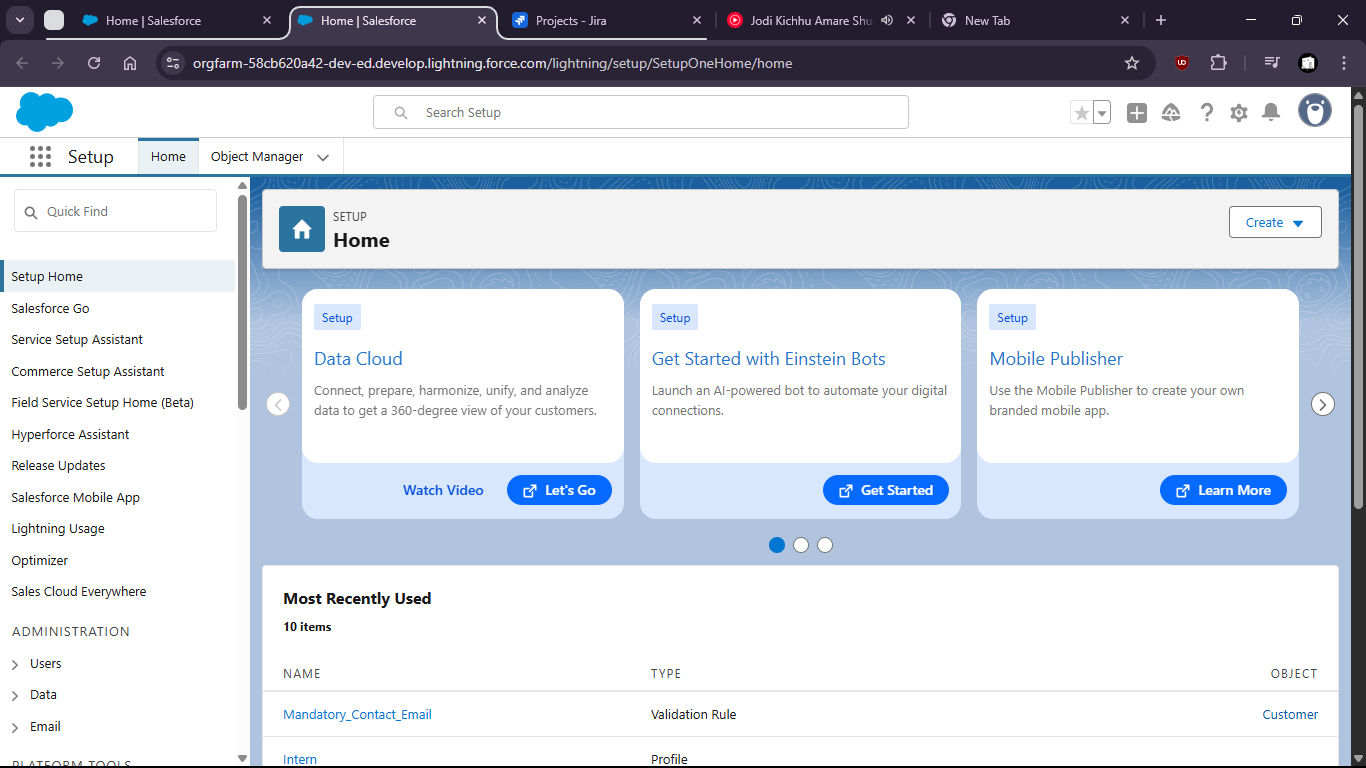




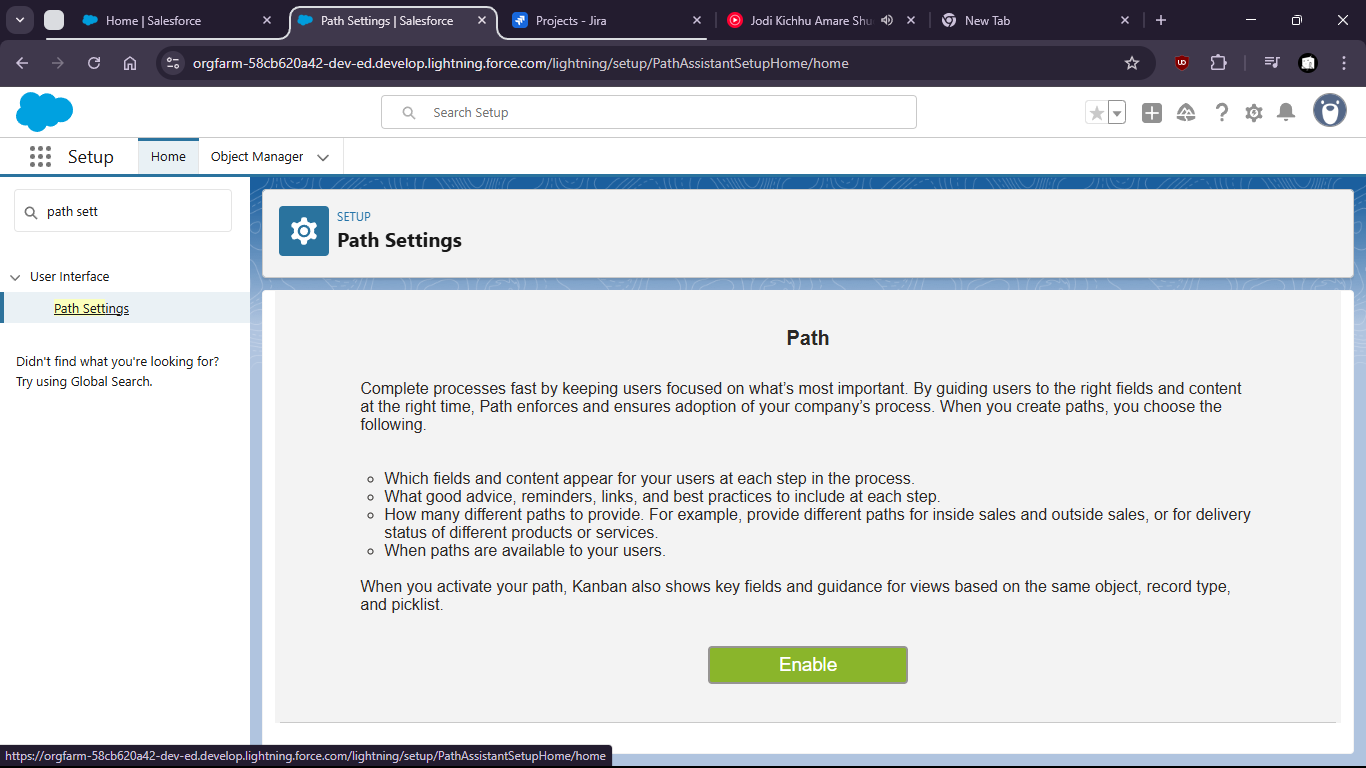


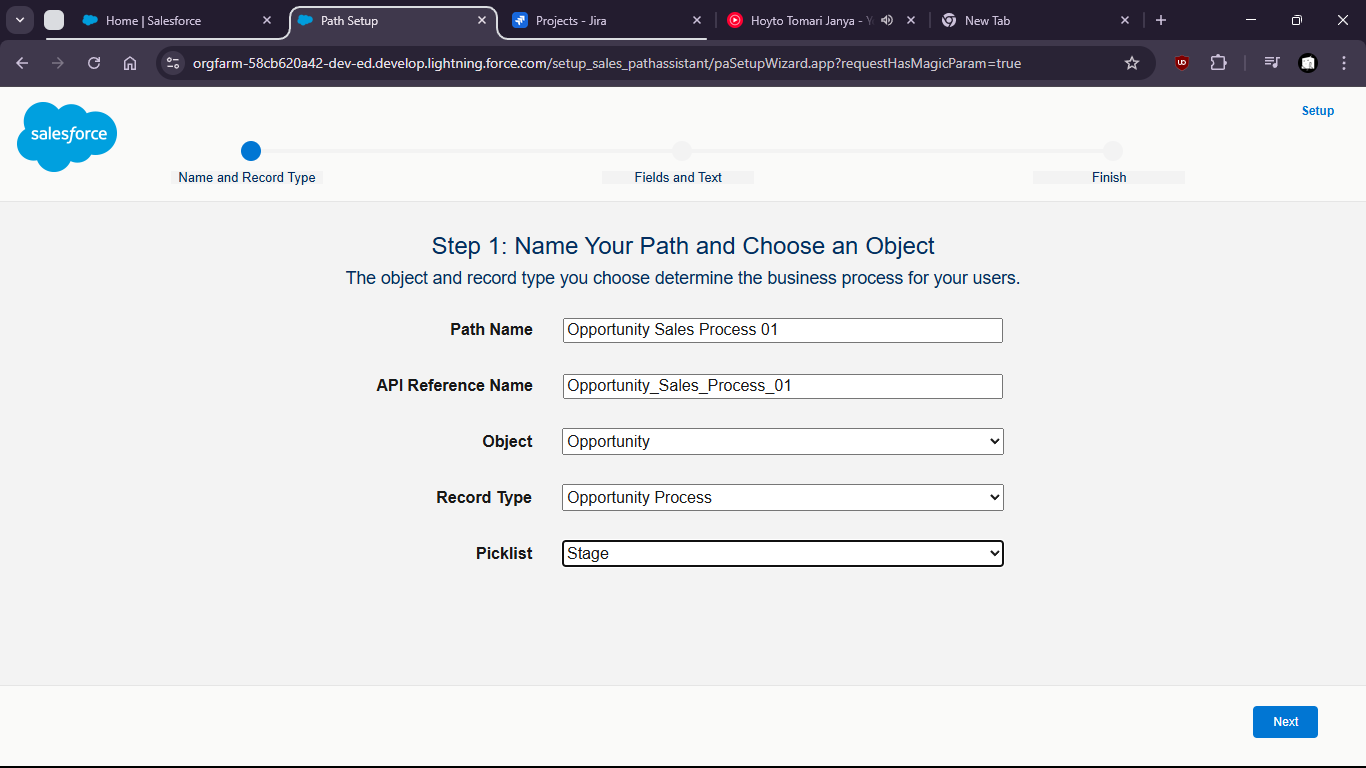
Task 3:Customize a Sales Path for Opportunities:

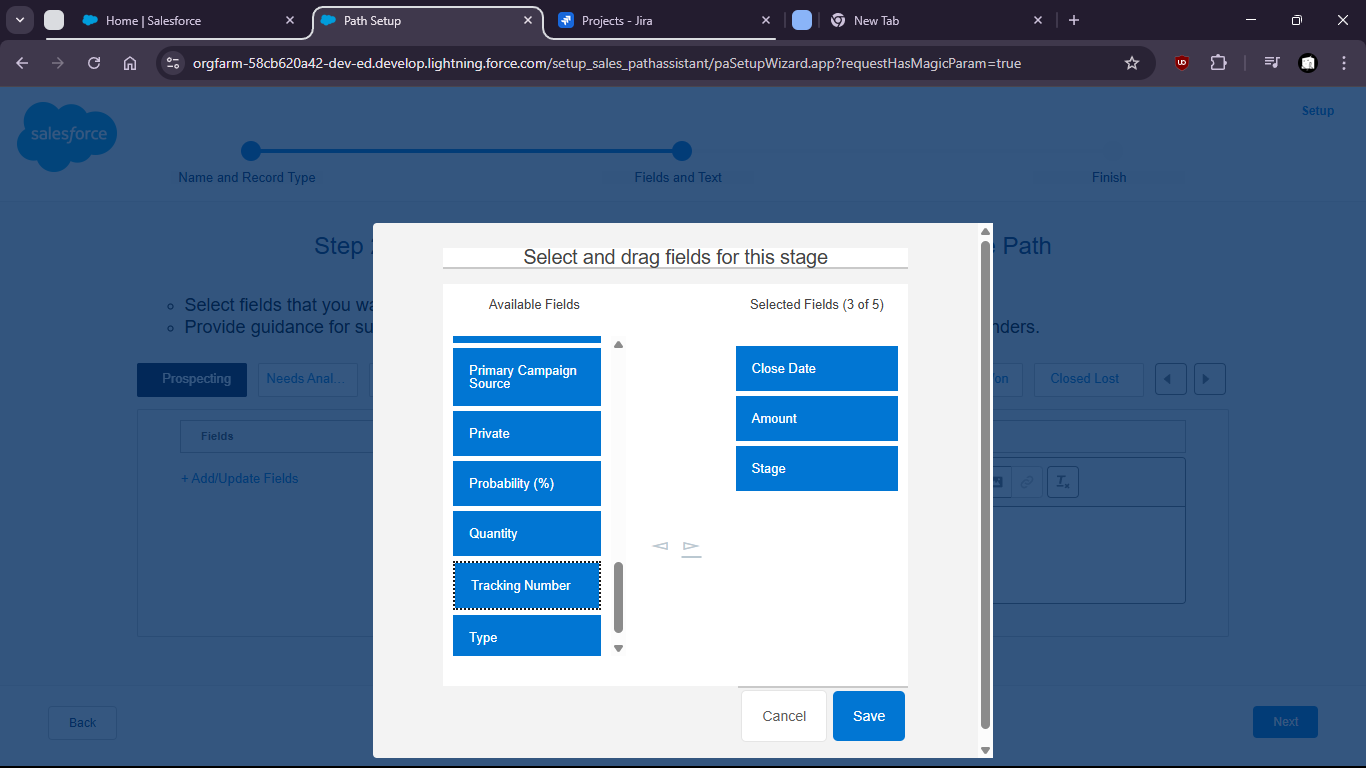
Define key fields and guidance for each stage.

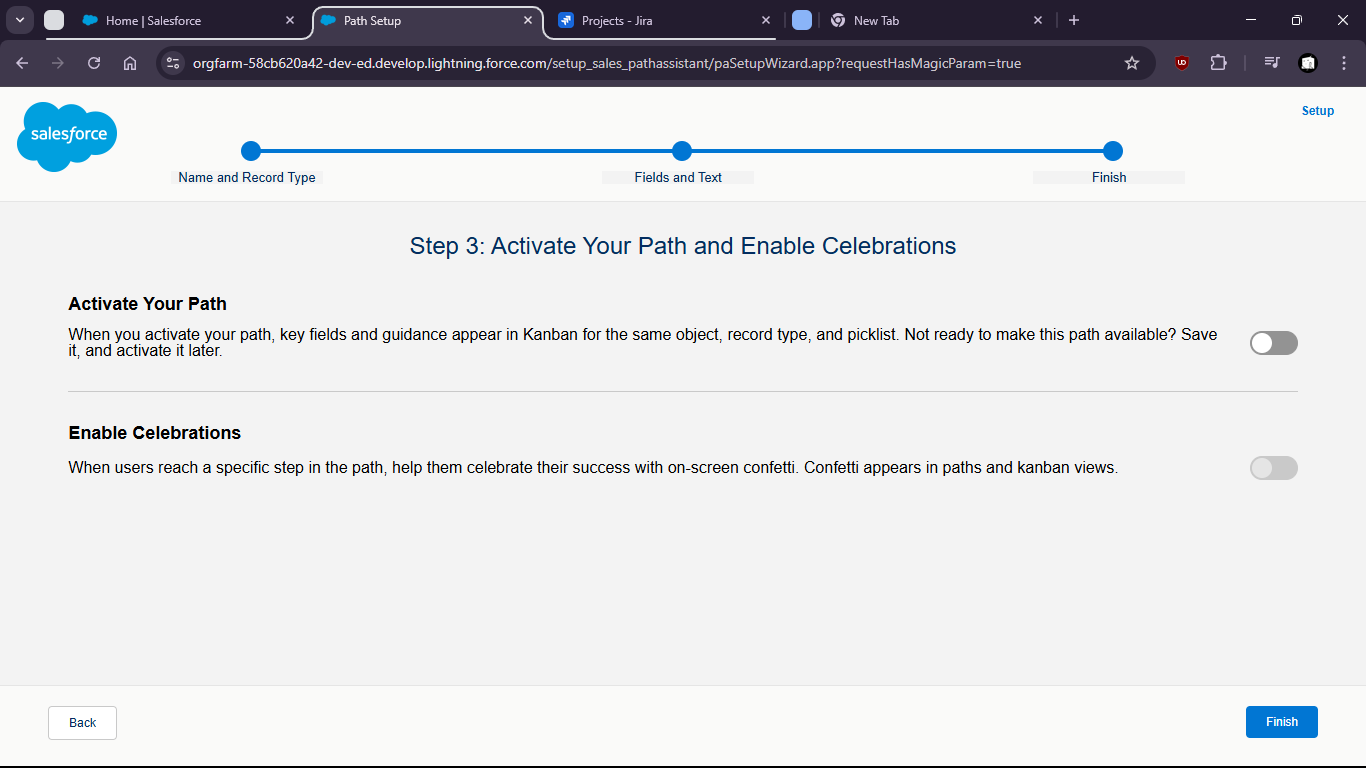


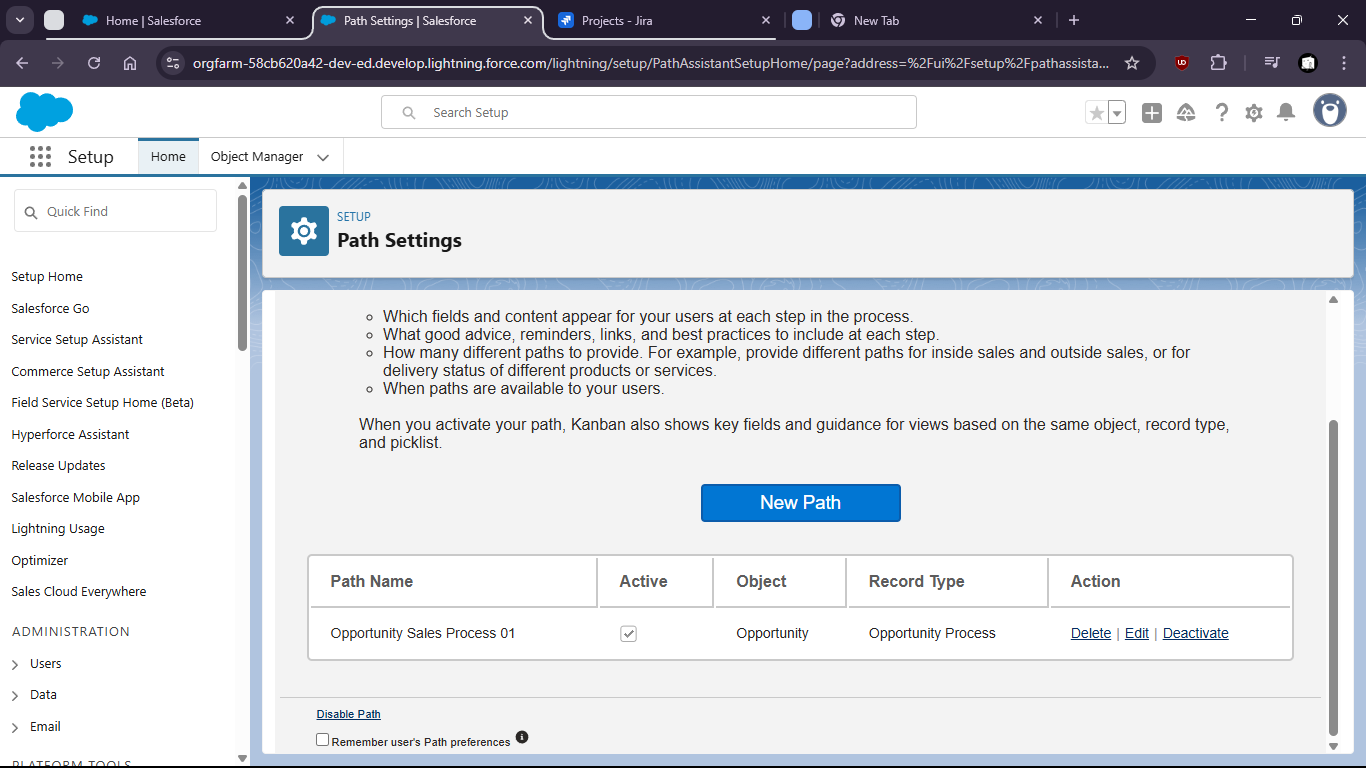
Goto setup > home > path settings.





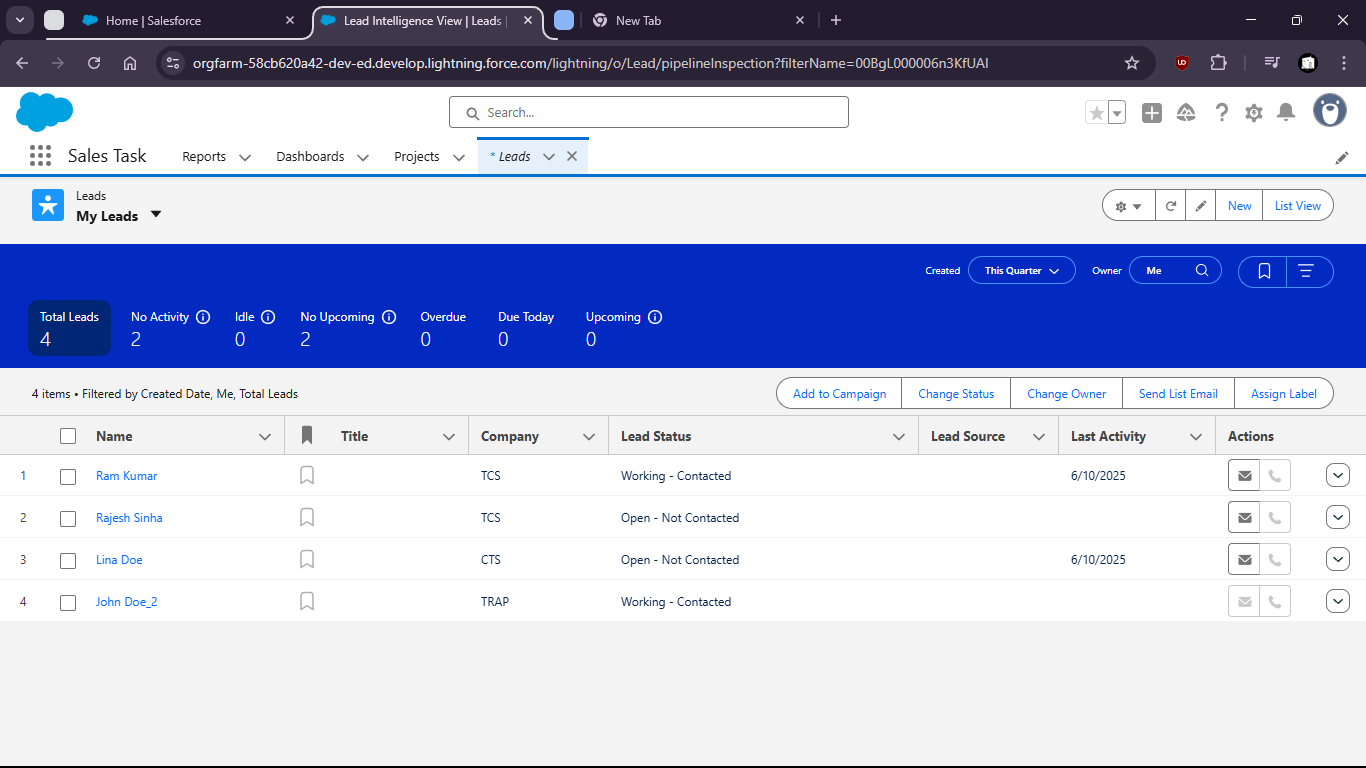


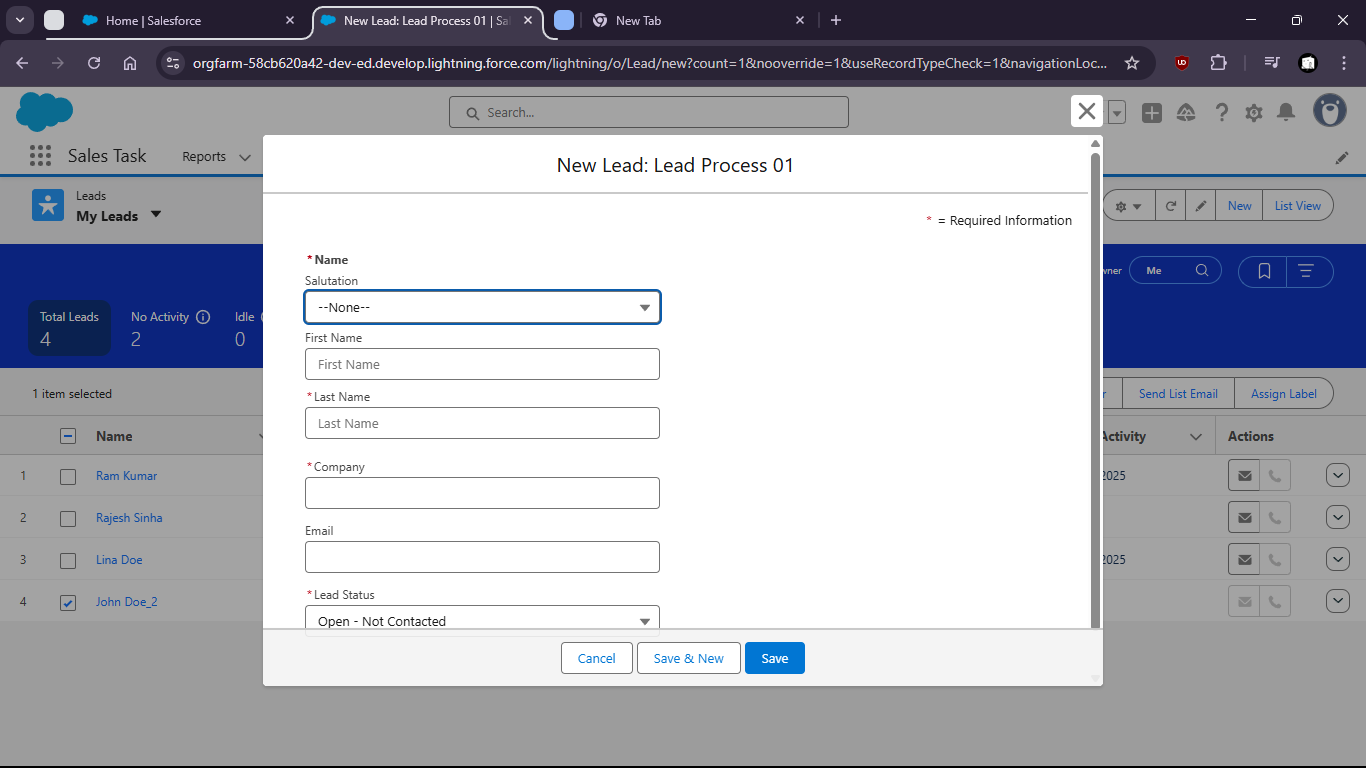


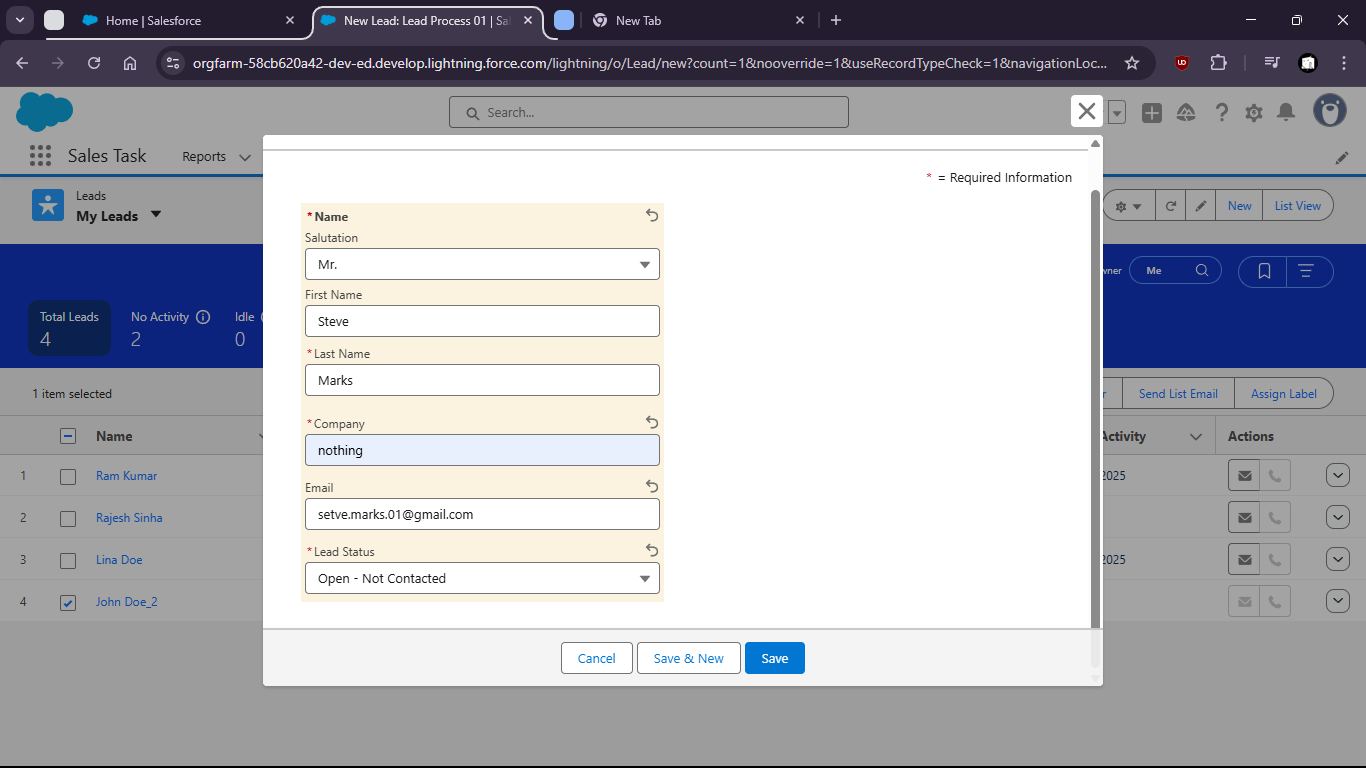


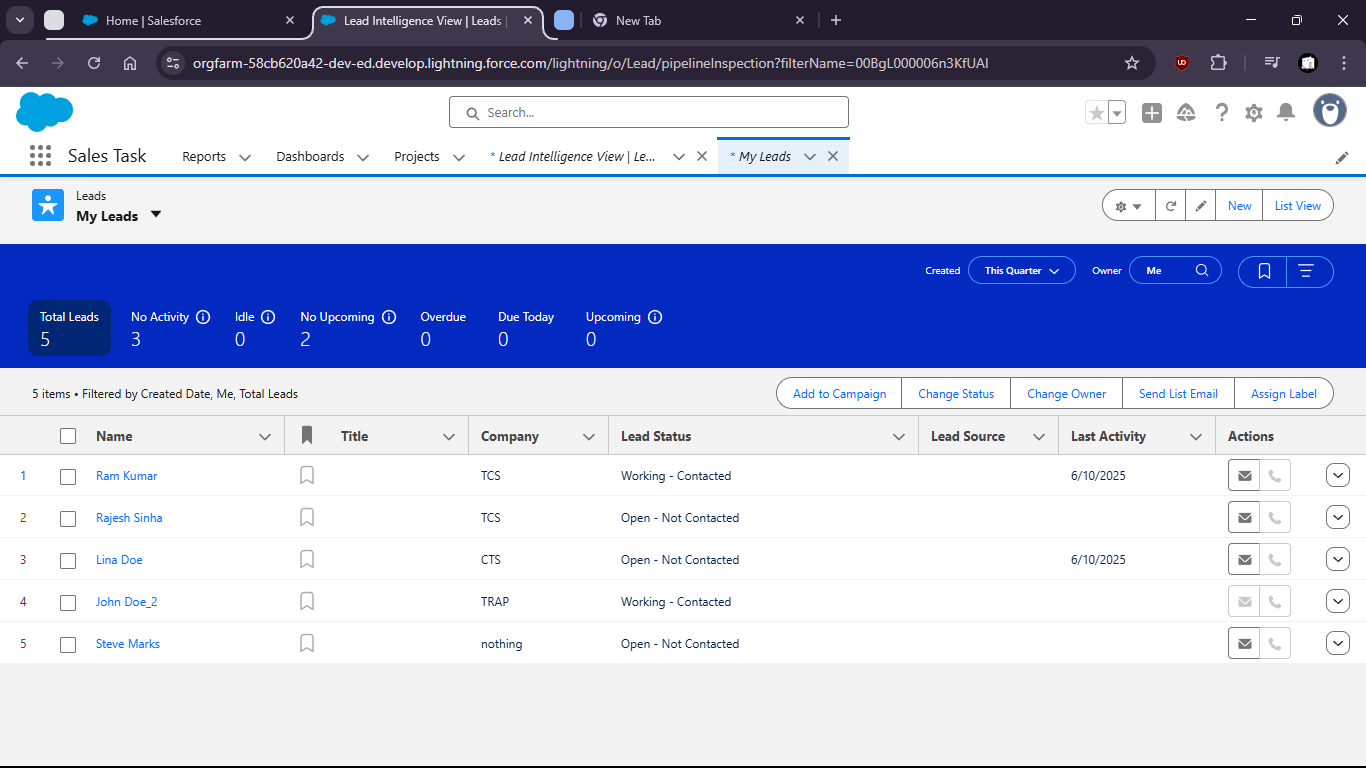
Task 4:Simulate a full Sales Cycle:

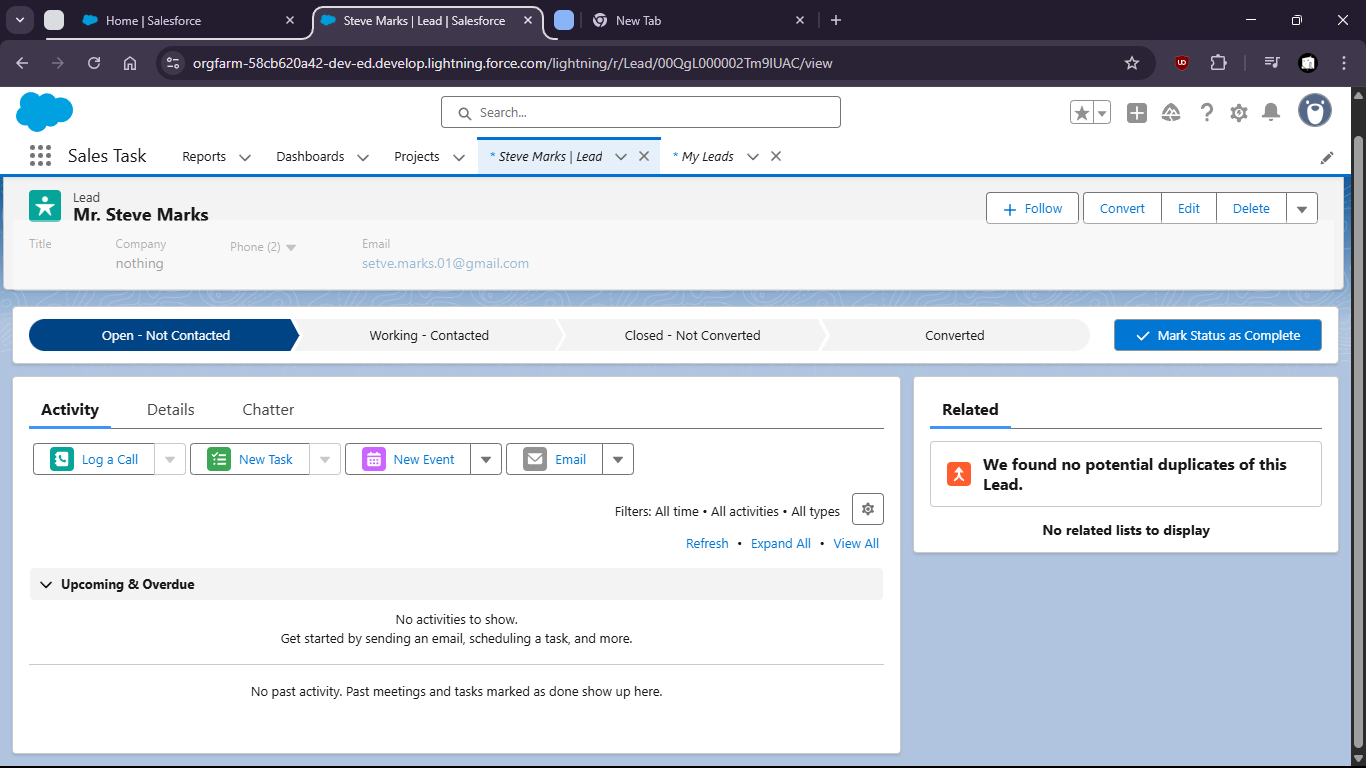
Convert a Lead – Create an Account & Contact – Create an Opportunity – Add Products – Close Opportunity

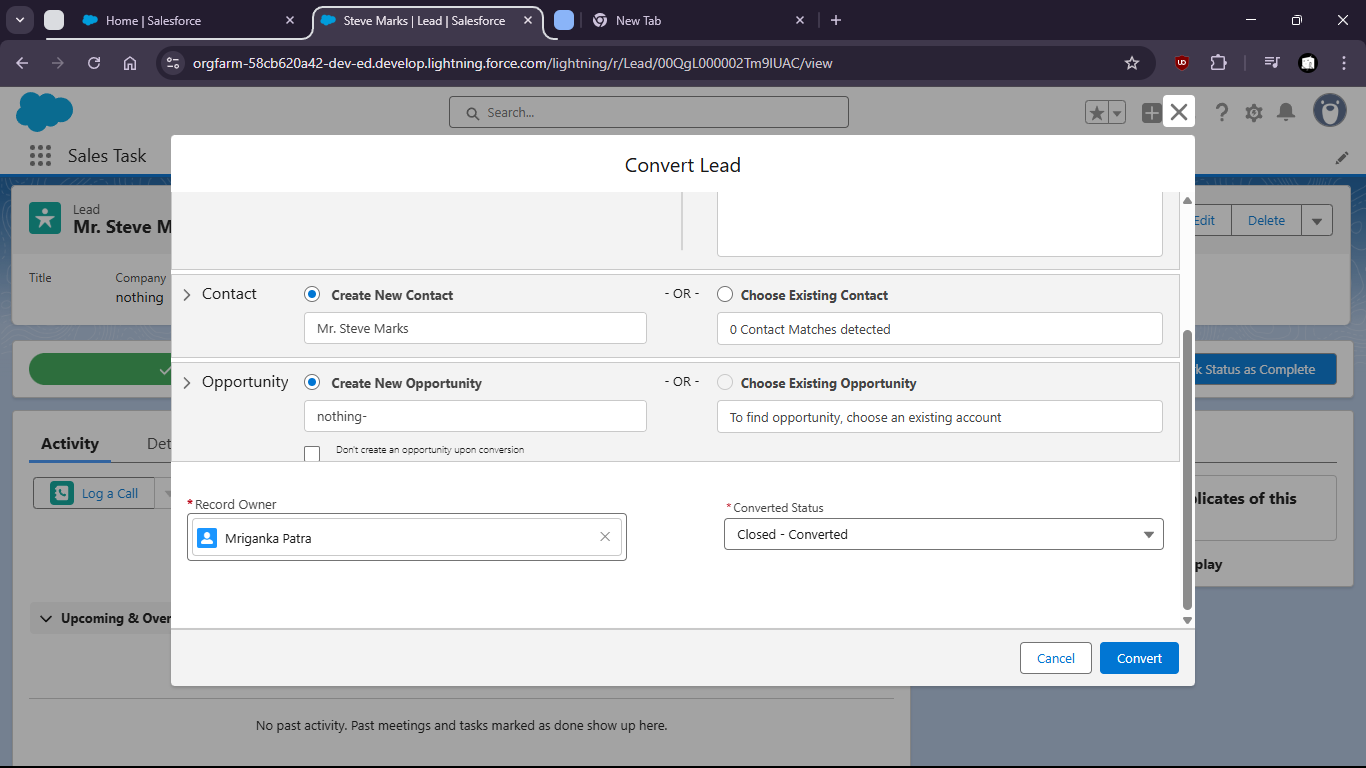


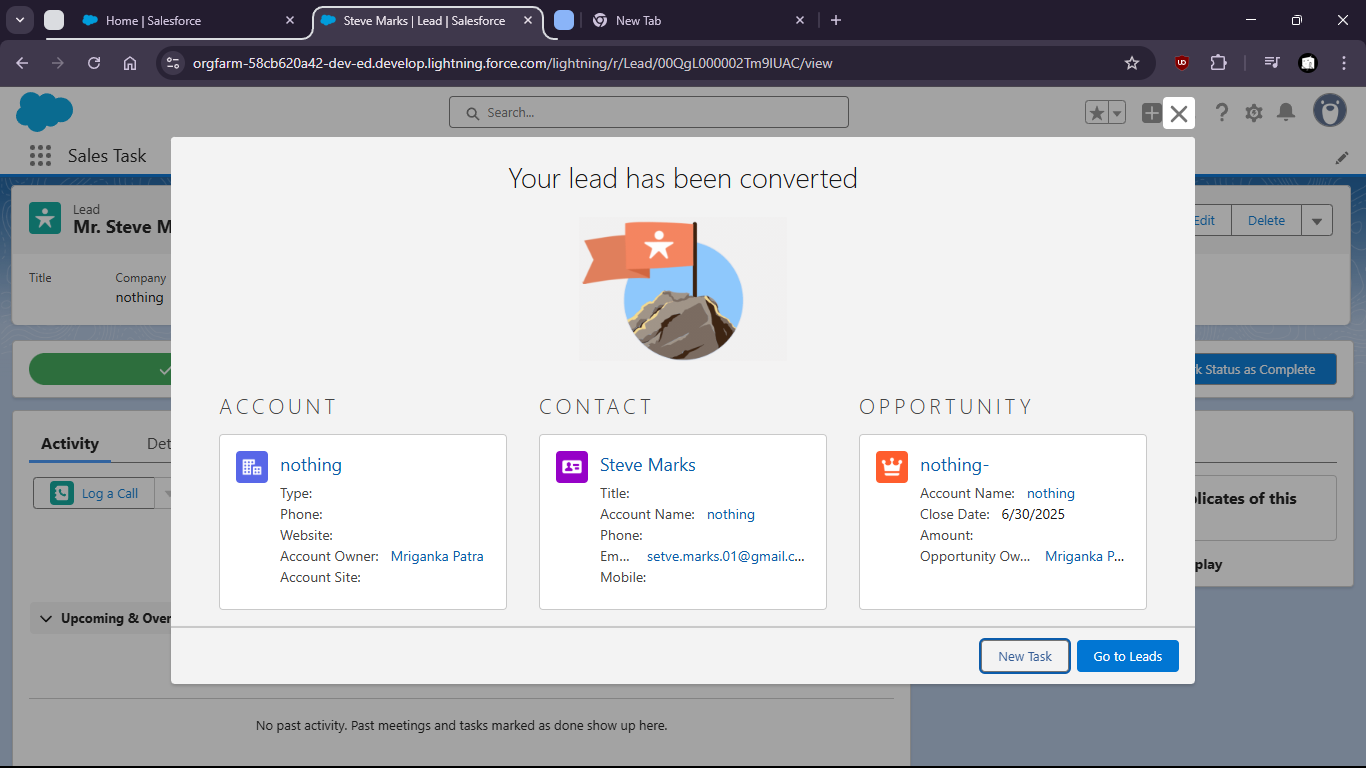


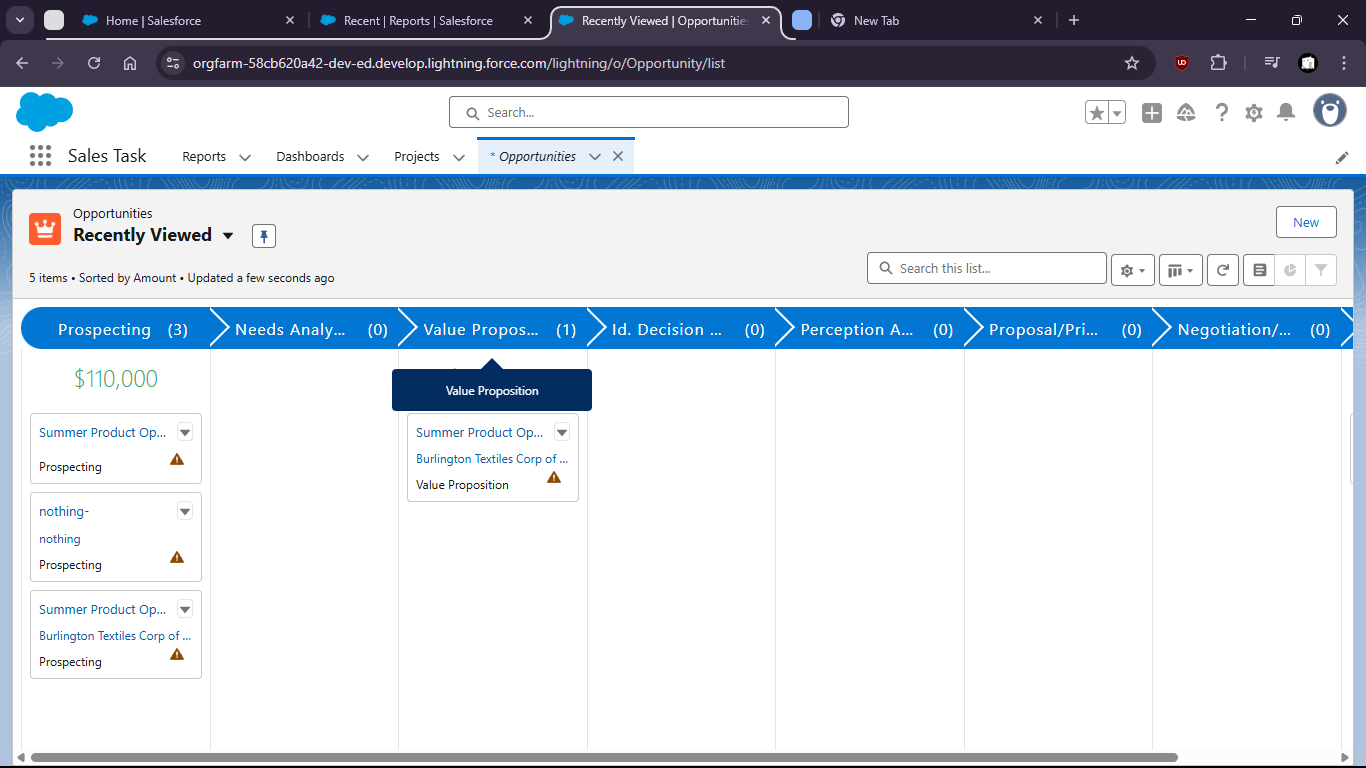












Task 5:Use Activity Timeline to log a call , schedule a task, and send an email from the Opportunity record

