

# **Opportunity Management in Salesforce**

Independent Project: Use Salesforce to Close Sales Deals

**Leonor Duarte** 

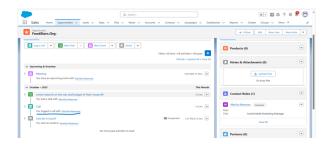
22/11/2024

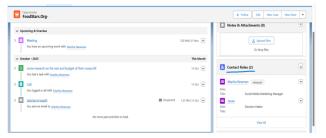
# Part A Overview

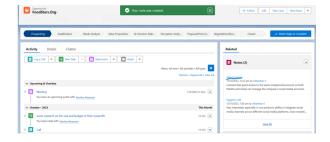
- 1 Task 1: Update FoodStars.org Opportunity Record
- 2 Task 2: Update Yaloo Search Opportunity Record
- 3 Task 3: Use Opportunity Kanban
- 4 Task 4: Perform a Business Case Analysis

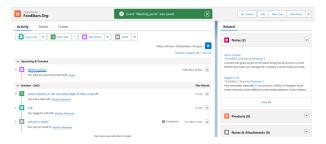
# Part A, Task 1: Update FoodStars.Org Opportunity Record







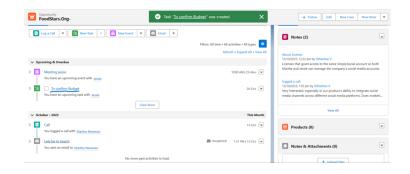


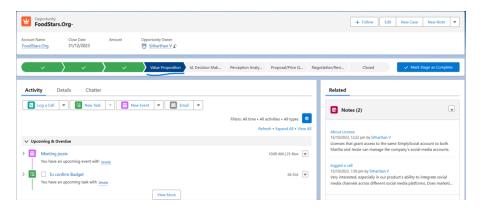


#### Part A Task 1:

# **Update FoodStars.Org Opportunity Record**



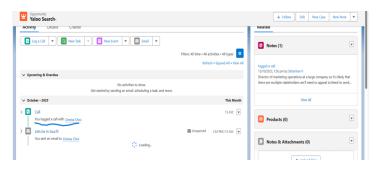


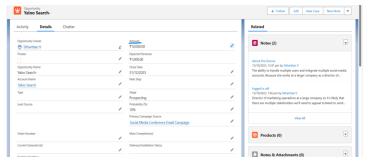


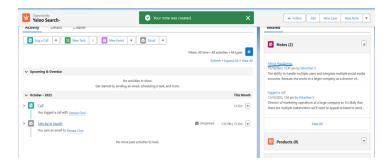
# Part A, Task 2:

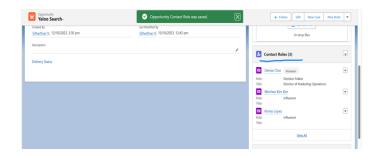
# **Update Yaloo Search Opportunity Record**







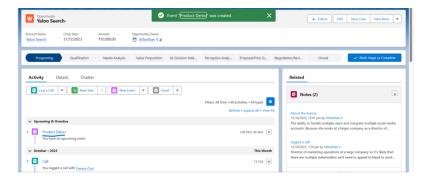


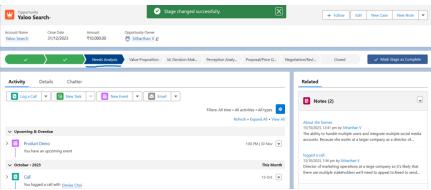


### Part A, Task 2:

# **Update Yaloo Search Opportunity Record**

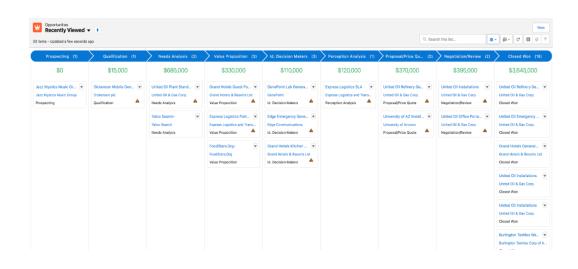






#### Part A, Task 3: Use Opportunity Kanban





### Part A, Task 4: Business Case Analysis



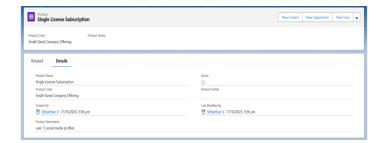
- Opportunity management is primarily handled by Account Executives (AEs), who use Salesforce tools to
  effectively manage their work and close deals. These tools provide the structure and visibility AEs need to
  track opportunities and move them through the sales pipeline.
- In Salesforce, opportunities go through several stages, similar to the steps in an MQL process. These stages
  typically include: Need Analysis, Value Proposition, Identify Decision Maker, Perception Analysis,
  Proposal/Price Quote, Negotiation, Closed Won, and Closed Lost. AEs manage these stages based on the
  prospect's level of interest and specific criteria for each deal.
- The Kanban View is especially useful for AEs, as it provides a clear, visual representation of all the stages, making it easier to track progress and focus on what's needed to advance opportunities.

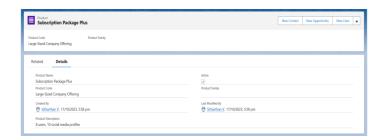
# Part B Overview

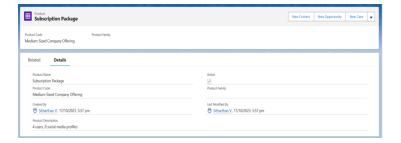
- 1 Task 1: Create Products
- 2 Task 2: Create Standard Price Books
- 3 Task 3: Create Custom Price Books
- 4 Task 4: Associate Price Books With Opportunities
- 5 Task 5: Create Quotes
- 6 Task 6: Send Quotes
- 7 Task 7: Close the Deal
- 8 Task 8: Create Contracts

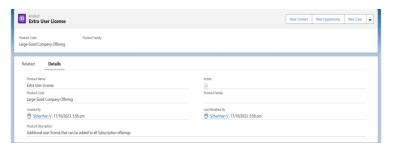
### Part B, Task 1: Create Products







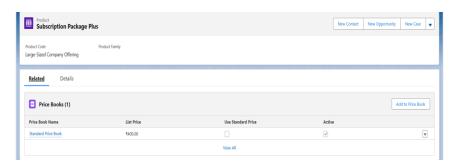




#### Part B, Task 2: Create Standard Price Books



Product Single License Subscript	ion		New Contact New	Opportunity New Case
roduct Code imall-Sized Company Offering	Product Family			
Related Details				
Price Books (1)				Add to Price Book
Price Book Name	List Price	Use Standard Price	Active	
Standard Price Book	₹50.00		₹	
		View All		

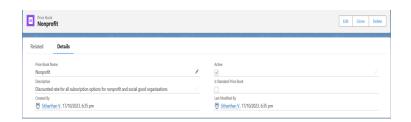






#### Part B, Task 3: Create Custom Price Books







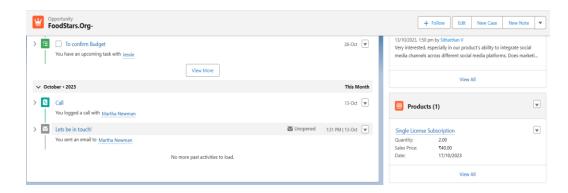


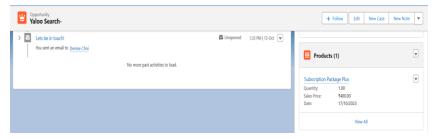


### Part B, Task 4:

# **Associate Price Books With Opportunities**

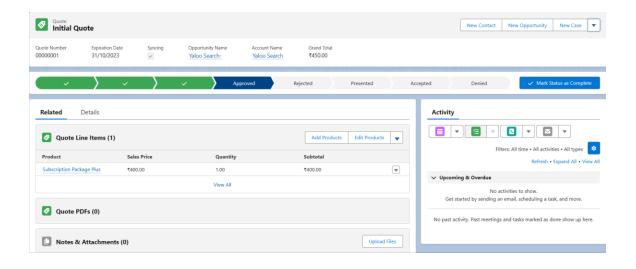






#### Part B, Task 5: Create Quotes





### Part B, Task 6: Send Quotes



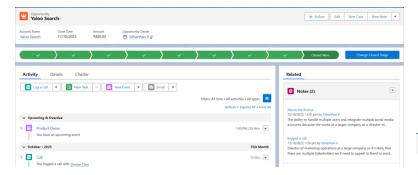
#### **RVS**

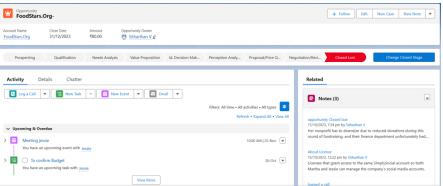
Company Address	IN		Created Date	17/10/2023		
			Expiration Date	31/10/2023		
			Quote Number	00000001		
Prepared By	Sitharthan V		Contact Name	Denise Choi		
Email	sidbala4023@gmail.com		Email	dchoi@yalooyoy	os.com	
Bill To Name	Yaloo Search		Ship To Name	Yaloo Search		
Bill To	19461 Greenview Ave New York 10174 New York United State		Ship To	19461 Greenvier New York 10174 New York United State		
Product		Date	List Price	Sales Price	Quantity	Total Price
Subscription Package Plus		17/10/2023	400.00	400.00	1.00	400.00
			Subtotal	400.00		
			Discount	0.00%		
			Total Price	400.00		
			Tax	50.00		
			Grand Total	450.00		
Quote Acceptano	o lafamatian					
Quote Acceptant	e information					
Signature						
Name						
Title						
Date						



#### Part B, Task 7: Close the Deal







### Part B, Task 8: Create Contracts



Contract 00000100  Account Name Yaloo Search	Status Draft	Contract Start Date 18/10/2023	Contract End Date 17/10/2024	Contract Term (months)		N	ew Contact New Opportunity New Case 🔻		
	~		$\rightarrow$	<b>✓</b>	<b>&gt;</b>	Draft	✓ Mark Status as Complete		
	Contract History (1)  Date Field User Original Value New Value					Activity			
	M Crei		Sitharthan V View All		Upload File	es	Overdue  No activities to show.  by sending an email, scheduling a task, and more.  Past meetings and tasks marked as done show up here.		
			Upload Files Or drop files						