

Opportunity Management in Salesforce

Independent Project: Use Salesforce to Close Sales Deals

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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

Software used: Trailhead playground and salesforce developer account

Part A, Task 1:

Update FoodStars.Org Opportunity Record

Added screenshots for each of these steps on the following slides to show the updates to the FoodStars.org opportunity record.

- I ensured that the title of the opportunity in my screenshot is clearly visible.

Step 1: Past activities showing the call logged with Martha

Step 2: Contact roles section showing Jessie Patel has been added

Step 3: Notes section showing I added a note about licenses

Step 4: Past activities showing the event created to meet with Jessie

Step 5: Past activities showing the task created to confirm budget

Step 6: Sales path showing the opportunity is now in the “Value Proposition” stage

Part A, Task 1:

Update FoodStars.Org Opportunity Record

The screenshot shows a Salesforce Lightning interface for the "FoodStars.org" account. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar. The main content area displays the "Opportunity" record for "FoodStars.org".

Opportunity Details:

- Opportunity Name:** FoodStars.org
- Opportunity Type:** FoodStars.org
- Opportunity Stage:** Prospecting
- Opportunity Amount:** €0.00
- Opportunity Probability (%):** 10%
- Opportunity Expected Revenue:** ...
- Opportunity Close Date:** 31/12/2022

Activity History:

- First Contact Call:** You logged a call. Description: It went well, from all indications, there is a need for our product with FoodStars.org.
- Upcoming & Overdue:** No activities to show. Get started by sending an email, scheduling a task, and more.

Related Sections:

- Contact Roles (0)
- Partners (0)
- Stage History (1)

At the bottom, there is a search bar and system status indicators.

Part A, Task 1:

Update FoodStars.Org Opportunity Record

Sales Home Op

Opportunity FoodStars.org

December • 2022

First Contact Call
You logged a call

Copy of Independent Project: Use | Hands-On Orgs | FoodStars.org | Salesforce

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d0000AhMB0AAN/view

Search...

Edit Contact Roles

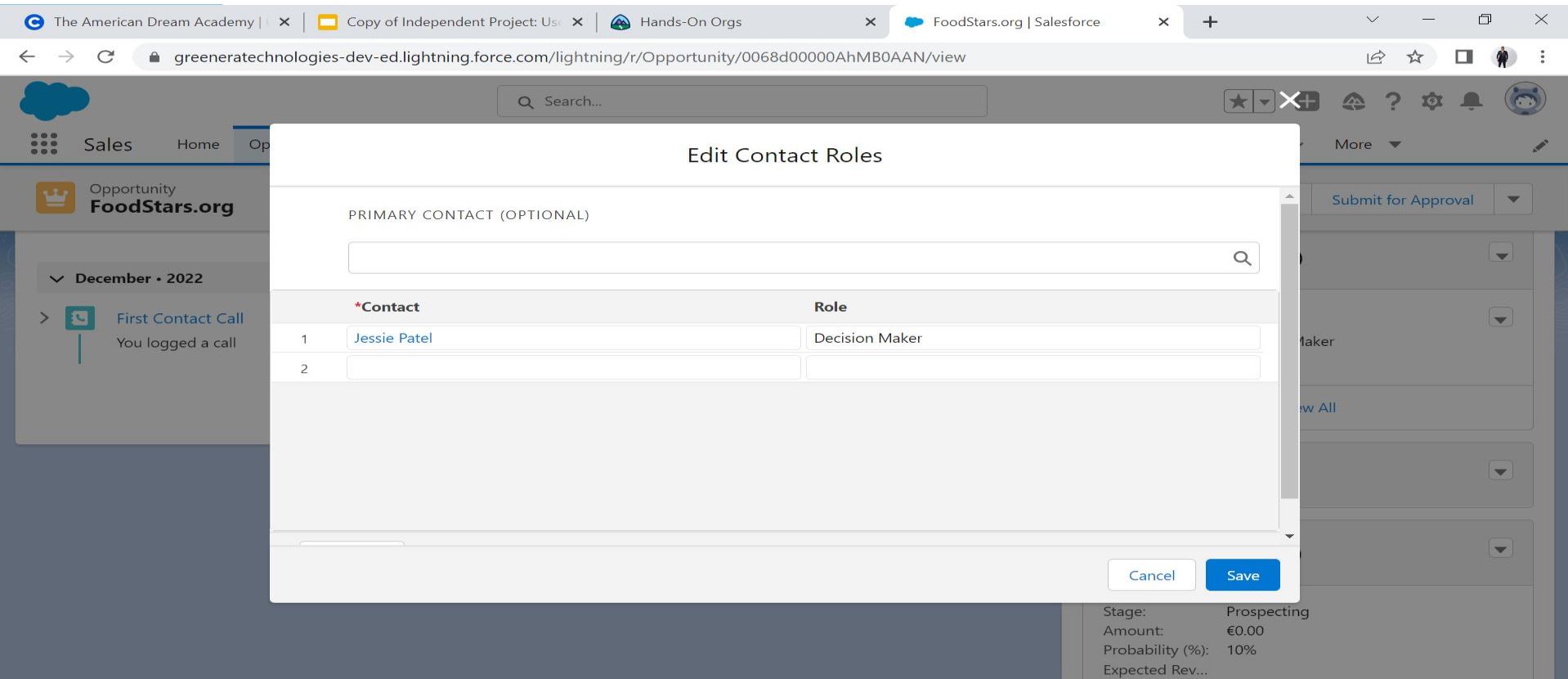
PRIMARY CONTACT (OPTIONAL)

*Contact	Role
1 Jessie Patel	Decision Maker
2	

Cancel Save

Stage: Prospecting
Amount: €0.00
Probability (%): 10%
Expected Rev...

Submit for Approval



Part A, Task 1:

Update FoodStars.Org Opportunity Record

The screenshot shows a Salesforce Lightning interface for an Opportunity record. The top navigation bar includes tabs for 'The American Dream Academy' (active), 'Copy of Independent Project: Us...', 'Hands-On Orgs', 'FoodStars.org | Salesforce', and a new tab. The URL in the address bar is 'greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMB0AAN/view'. The main content area displays the following details:

- Opportunity Name:** FoodStars
- Stage:** Qualified
- Probability:** 75%
- Amount:** \$100,000
- Closing Date:** December 31, 2022
- Description:** FoodStars.org would need two SimplySocial licenses that grant access to the same SimplySocial account so both Martha and Jessie can manage the company's social media accounts.
- Activity:** New Task (button)
- Log a Call (button):** You logged a call (with a call icon)
- Upcoming & Overdue:** A section showing tasks and calls due.
- December • 2022:** A section showing a First Contact Call.

The right sidebar contains sections for 'Attachments (1)', 'KB • docx', 'View All', and 's (1)', with a 'View All' link at the bottom. The bottom of the page features a dark footer bar with navigation icons and a page number indicator: 'Page 1 of 1'.

Part A, Task 1:

Update FoodStars.Org Opportunity Record

The American Dream Academy | x | Copy of Independent Project: Use x | Hands-On Orgs x | FoodStars.org | Salesforce x | +

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMB0AAN/view

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards More

No activities to show.
Get started by sending an email, scheduling a task, and more.

December • 2022 This Month

First Contact Call Today

You logged a call

November • 2022 Last Month

Event to discuss sales and Demo 10:00 | 25 Nov

You had an event with Jessie Patel

No more past activities to load.

Contact Roles (1)

Jessie Patel Decision Maker

Role: Title:

View All

Partners (0)

Stage History (1)

Stage: Prospecting
Amount: €0.00
Probability (%): 10%
Expected Rev...
Close Date: 31/12/2022
Last Modified: Oabonna Nawu

11:25 AM

Part A Task 1:

Update FoodStars.Org Opportunity Record

The screenshot shows a Salesforce Opportunities page for a record titled "FoodStars.org | Salesforce". The page includes a sidebar with activity history and a main panel with contact roles, partners, and stage history.

Sidebar (Left):

- Upcoming & Overdue:**
 - Task: Confirm Budget with Jessie on call (No due date)
 - You have an upcoming task with [Jessie Patel](#).
- December • 2022:**
 - Activity: First Contact Call (Today)
 - You logged a call.
- November • 2022:**
 - Event: Event to discuss sales and Demo (10:00 | 25 Nov)
 - You had an event with [Jessie Patel](#).

No more past activities to load.

Main Panel (Right):

- Contact Roles (1):**
 - Jessie Patel (Role: Decision Maker, Title:)
- Partners (0):**
- Stage History (2):**

Stage	Amount	Probability (%)	Expected Rev.	Close Date
Prospecting	€700.00	10%	€70.00	31/12/2022

Part A, Task 1:

Update FoodStars.Org Opportunity Record

The American Dream Academy | x | Copy of Independent Project: Use | Hands-On Orgs | FoodStars.org | Salesforce

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMB0AAN/view

Search...

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards More

Opportunity FoodStars.org

Follow New Case Clone Submit for Approval

Account Name Close Date Amount Opportunity Owner
31/12/2022 €700.00 Ogbonna Ngwu

Value Prop... Id. Decision ... Perception ... Proposal/Pri... Negotiation... Closed Mark Stage as Complete

Activity Details Chatter

New Task Log a Call New Event Email

Create a task... Add

Filters: All time • All activities • All types Refresh • Expand All • View All

Related Products (0)

Notes & Attachments (1)

FoodStars 17 Dec 2022 • 12KB • docx

Type here to search

11:32 AM 12/17/2022

Part A, Task 2:

Update Yaloo Search Opportunity Record

Insert screenshots for each of these steps on the following slides to show the updates to the Yaloo Search opportunity record.

- I ensured that the title of the opportunity in my screenshot is clearly visible.

Step 1: Past activities showing the call logged with Denise

Step 2: Notes section showing I added a note about licenses

Step 3: Details tab showing I updated the opportunity amount

Step 4: Contact roles section showing Kenny and Wonhee have been added

Step 5: Past activities showing the event created for the demo

Step 6: Sales path showing the opportunity is now in the “Needs Analysis” Stage

Part A, Task 2:

Update Yaloo Search Opportunity Record

The screenshot shows a Salesforce Lightning interface for an Opportunity record. The URL in the browser is <greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMDLAA3/view>. The page title is "Yaloo Search | Salesforce".

The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar.

The main content area displays the Opportunity record for "Yaloo Search". Key details shown include:

- Opportunity Name:** Yaloo Search
- Upcoming & Overdue:** No activities to show. Get started by sending an email, scheduling a task, and more.
- December • 2022:** First Contact Call (Icon: Phone). You logged a call with Denise. Details: Name (Denise), Description (Call to water the ground, intros and establish there is a need for our product at Yaloo search.). Status: Loading... (Icon: Blue dots).
- This Month:** Today (dropdown menu).
- Right-hand sidebar:**
 - Upload Files (Icon: Up arrow)
 - Contact Roles (0)
 - Partners (0)
 - Stage History

The bottom right corner shows the time as 11:40 AM.

Part A, Task 2:

Update Yaloo Search Opportunity Record

The screenshot shows a Salesforce Opportunity record for 'Yaloo Search'. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a Yaloo Search sidebar.

The main content area displays the Opportunity details:

- Name:** Yaloo Search
- Description:** Denise is very excited about SimplySocial's products and capabilities, especially the ability to handle multiple users and integrate multiple social media accounts. Because she works at a larger company as a director of marketing operations, she finds this very valuable. She anticipates that her team of 10 social media managers and content creators will need 10 separate licenses.
- First Contact Call:** You logged a call with Denise on December 2022.
- Call Details:** Name: Denise, Description: Call to water the ground.

On the right side, there are sections for 'Attachments' (0), 'Comments' (1), and a 'History' section showing a recent update by Anna Ngwu on 12/22/2022 at 19:36.

At the bottom, a navigation bar shows 'Page 1 of 1'.

Part A, Task 2:

Update Yaloo Search Opportunity Record

The screenshot shows a Salesforce Lightning interface for updating an opportunity record.

Opportunity Details:

- Opportunity Name:** Yaloo Search
- Account Name:** Yaloo Search
- Close Date:** 31/12/2022
- Amount:** €10,000.00
- Opportunity Owner:** Ogbonna Ngwu

Stages: Prospecting → Qualification → Needs Analy... → Value Propo... → Id. Decision ... → Perception ... → Proposal/Pri... → Negotiation... → Closed

Actions: + Follow, New Case, Clone, Submit for Approval

Activity: New Task, Log a Call, New Event, Email

Recap your call...

Related:

- Products:** (0)
- Notes & Attachments:** (1)
 - Yaloo Search (17 Dec 2022 • 12KB • docx)

Filters: All time • All activities • All types

Refresh • Expand All • View All

View All

Part A, Task 2:

Update Yaloo Search Opportunity Record

The screenshot shows a Salesforce Lightning interface for updating an opportunity record. The URL in the browser is <greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMDLAA3/view>. The main title is "Edit Contact Roles".

The primary contact section is optional and currently empty.

*Contact	Role
1 Kenny Lopez	Influencer
2 Wonhee Kim	Influencer
3	

Buttons at the bottom right of the modal are "Cancel" and "Save".

On the left sidebar, under "Opportunity", there is a section titled "Yaloo Search" which includes a "Submit for Approval" button.

At the bottom right of the page, there is a "View All" button.

Part A, Task 2:

Update Yaloo Search Opportunity Record

The screenshot shows the Salesforce Lightning interface with the Opportunities tab selected. The main content area displays the details of an opportunity named "Yaloo Search".

Opportunity Details:

- Name:** Yaloo Search
- Type:** Standard
- Stage:** Qualified Lead
- Probability:** 50%
- Amount:** \$100,000
- Close Date:** 2023-01-15
- Owner:** Denise (denise.jones)
- Last Activity:** 2022-12-17 13:00

Recent Activities:

- Product Demo Event:** You have an upcoming event with [Denise](#).
- First Contact Call:** You logged a call with [Denise](#).

Upcoming & Overdue:

- Product Demo Event:** 13:00 | 30 Dec

Timeline: December • 2022

Related Sections:

- Contact Roles (2):**
 - Wonhee Kim (Influencer)
 - Kenny Lopez (Influencer)
- Partners (0):**

Header: greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Opportunity/0068d00000AhMDLAA3/view

Part A, Task 2:

Update Yaloo Search Opportunity Record

The screenshot shows a Salesforce Lightning interface for an Opportunity record. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar. The main content area displays the Opportunity details for 'Yaloo Search'. Key fields shown include Account Name (Yaloo Search), Close Date (31/12/2022), Amount (€10,000.00), and Opportunity Owner (Ogbonna Ngwu). Below the details, a progress bar indicates the stage of the opportunity: Needs Analy... (highlighted in blue), Value Propo..., Id. Decision ..., Perception ..., Proposal/Pri..., Negotiation..., and Closed. A button to 'Mark Stage as Complete' is also present. On the left, the 'Activity' tab is selected, showing options for New Task, Log a Call, New Event (which is currently active), and Email. A text input field for 'Set up an event...' and an 'Add' button are also visible. On the right, the 'Related' tab is selected, showing sections for Products (0) and Notes & Attachments (1), which contains a note from 'Yaloo Search' dated 17 Dec 2022.

The Opportunity record for **Yaloo Search** is displayed. Key details include:

- Account Name: Yaloo Search
- Close Date: 31/12/2022
- Amount: €10,000.00
- Opportunity Owner: Ogbonna Ngwu

The opportunity is currently at the **Needs Analy...** stage. Other stages shown in the pipeline are Value Propo..., Id. Decision ..., Perception ..., Proposal/Pri..., Negotiation..., and Closed. A button to **Mark Stage as Complete** is available.

Activity

New Task | Log a Call | **New Event** | Email

Set up an event... | Add

Filters: All time • All activities • All types | Refresh • Expand All • View All

Related

Products (0)

Notes & Attachments (1)

Yaloo Search | 17 Dec 2022 • 12KB • docx

Part A, Task 3: Use Opportunity Kanban

Added a screenshot showing the updated opportunity Kanban board on the following slide. I made sure to displays which opportunity stages both the FoodStars.org and Yaloo Search opportunities are in as well as the estimated amounts attached to both.

Part A, Task 3: Use Opportunity Kanban

The screenshot shows a Salesforce Opportunities Kanban board titled "Recently Viewed". The board is divided into eight columns representing different stages: Prospecting, Qualification, Needs Analysis, Value Proposition, Id. Decision Ma..., Perception Anal..., and Proposal/Pric... The first stage, Prospecting, contains two items, both of which are currently in progress (indicated by a yellow triangle icon). The second stage, Qualification, has zero items. The third stage, Needs Analysis, contains one item, which is also in progress. The fourth stage, Value Proposition, contains one item, which is also in progress. The fifth stage, Id. Decision Ma..., has zero items. The sixth stage, Perception Anal..., has zero items. The seventh stage, Proposal/Pric..., has zero items. The eighth stage, which is partially visible, also has zero items.

The board includes a search bar at the top right and a "New" button. Below the board, there are dropdown menus for each stage, showing the names of the opportunities assigned to them. For example, the "Prospecting" stage dropdown lists "Attitude Talent Agency" and "Kiran and Co Market...". The "Needs Analysis" stage dropdown lists "Yaloo Search". The "Value Proposition" stage dropdown lists "FoodStars.org".

At the bottom left, there are two additional sections: "Attitude Talent Agency" and "Kiran and Co Market...".

At the top of the page, the browser title bar shows multiple tabs: "The American Dream Academy", "Copy of Independent Project: Use", "Hands-On Orgs", and "Recently Viewed | Opportunities". The URL in the address bar is "greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Opportunity/list?filterName=Recent".

Part A, Task 4: Business Case Analysis



In a short paragraph, I described how updating opportunity records, progressing opportunities through stages, and using opportunity Kanban in Salesforce would help SimplySocial's team of account executives sell better and more efficiently. In my description, I included:

- The overall purpose of opportunity records, opportunity stages, and opportunity Kanban
- The steps I took to help the AE organize and progress opportunities through the stages.
- How a company like SimplySocial would benefit from using opportunities and opportunity stages

Part A, Task 4: Business Case Analysis

Purpose of Opportunity Records, Stages, and Kanban:

1. To help AEs have an organised sales Opportunity pipeline
2. To make sales process not be random process
3. To have central database of sales processes accessible to every member of the sales team.
4. To make sales efficient and opportunity stages of sales activity tracked in the easiest possible way.

Steps I took to help AEs organise and progress opportunities.

I showed the AE how to:

1. log new opportunities into Salesforce
2. How to log tasks, calls, events, contact roles and notes into sales and keep track of them all.
3. How update opportunity stages in salesforce
4. How to use Kanban View to keep track of opportunities in the sales pipeline in visual format.

How businesses would benefit from using opportunity and opportunity stages:

1. Though it is not same across businesses but splitting it in stages will help the AEs to know exactly what stage of sales activity the sales pipeline is currently on and help AEs know exactly what to do/expect next.
2. It makes sales activity trackable and easy to review for reference purposes.

You have reached the end of Part A!



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



Inserted screenshots for each of the new products I created. Made sure that screenshots of the product record page shows the name of the product as well as all the product details according to the specifications in the instructions.

Step 1: Product record page for the single license subscription product

Step 2: Product record page for the subscription package product

Step 3: Product record page for the subscription package plus product

Step 4: Product record page for the extra user license product

Part B, Task 1: Create Products

The screenshot shows the Salesforce interface for creating a new product. The top navigation bar includes tabs for 'The American Dream Academy', 'Hands-On Orgs', 'New Product | Salesforce', and 'Copy of Independent Project: Use...'. The main menu bar has items like Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, and More. A search bar is at the top center. On the left, there's a sidebar titled 'Products Recently Viewed' with a dropdown arrow, showing 0 items updated a few seconds ago. Below it is a 'Product Name' filter. The main content area is titled 'New Product' and contains a 'Product Information' section. It includes fields for 'Product Name' (set to 'Single License Subscription'), 'Active' status (checked), 'Product Code' ('Small-Sized Company Offering'), 'Product Family' (set to 'None'), and a 'Product Description' text area containing the text '1 user, 5 social media profiles'. At the bottom right are buttons for 'Cancel', 'Save & New', and a blue 'Save' button.

New Product

Product Information

* Product Name

Single License Subscription

Active

Product Code

Small-Sized Company Offering

Product Family

None

Product Description

1 user, 5 social media profiles

Cancel Save & New Save

Part B, Task 1: Create Products

The screenshot shows the Salesforce interface for creating a new product. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, and More. A search bar is located at the top center. The main content area is titled "New Product" and contains a "Product Information" section. This section includes fields for Product Name (with a required red asterisk), Active status (checked), Subscription Package (empty), Product Code (Medium-Sized Company Offering), Product Family (None), and a large Product Description field containing the text "4 users, 8 social media profiles". At the bottom right of the modal are three buttons: "Cancel", "Save & New", and a blue "Save" button.

The browser address bar shows the URL: greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Product2/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW... .

The left sidebar shows a "Recently Viewed" section with one item updated 2 minutes ago, and a "Product Family" dropdown set to "None".

Part B, Task 1: Create Products

The screenshot shows a Salesforce interface for creating a new product. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products (selected), Orders, Contracts, Accounts, More, and a search bar. A sidebar on the left displays the product's details: Product Code (Medium-Sized Company Offering) and Related (Product Name: Subscription Package). The main content area is titled 'New Product' and contains a 'Product Information' section. It includes fields for Product Name (Subscription Package Plus), Active status (checked), Product Code (Large-Sized Company Offering), Product Family (None), and Product Description (8 users, 10 social media profiles). At the bottom right are buttons for Cancel, Save & New, and Save.

New Product

Product Information

* Product Name

Subscription Package Plus

Active

Product Code

Large-Sized Company Offering

Product Family

None

Product Description

8 users, 10 social media profiles

Cancel Save & New Save

Part B, Task 1: Create Products

The screenshot shows the Salesforce Lightning interface with a 'New Product' dialog open. The dialog is titled 'New Product' and contains a 'Product Information' section. In this section, the 'Product Name' field is populated with 'Extra User License', and the 'Active' checkbox is checked. The 'Product Code' field is populated with 'Large-Sized Company Offering'. The 'Product Family' dropdown is set to 'None'. The 'Product Description' text area contains the text: 'Additional user license that can be added to all Subscription offerings'. At the bottom of the dialog, there are three buttons: 'Cancel', 'Save & New', and a blue 'Save' button.

The background shows the Sales tab selected in the navigation bar, and a sidebar on the left displays product details for 'Subscription Package Plus'.

New Product

Product Information

* Product Name: Extra User License
Active:

Product Code: Large-Sized Company Offering
Product Family: None

Product Description:
Additional user license that can be added to all Subscription offerings

Cancel Save & New Save

greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Product2/list?filterName=Recent

The screenshot shows the Salesforce Lightning Experience interface. At the top, there's a navigation bar with links for Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products (which is currently selected), Orders, Contracts, Accounts, and More. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled "Products Recently Viewed". It displays a table with four items, each with a checkbox, product name, category, code, description, and a dropdown menu. A "New" button is located in the top right corner of the list area.

	Product Name	Product Cl...	Product Code	Product Description	Product F...	
1	Extra User License	Simple	Large-Sized Company Offering	Additional user license that can be added to all Subscription offerings	None	
2	Subscription Package Plus	Simple	Large-Sized Company Offering	8 users, 10 social media profiles	None	
3	Subscription Package	Simple	Medium-Sized Company Offering	4 users, 8 social media profiles	None	
4	Single License Subscription	Simple	Small-Sized Company Offering	1 user, 5 social media profiles	None	

Part B, Task 2: Create Standard Price Books



Added screenshots showing the standard price book entry, or list price, I have added for each of the products I created. I made sure the screenshot shows the name of the product as well as the standard price book and list price entry.

Step 1: Standard price book for the single license subscription product

Step 2: Standard price book for the subscription package product

Step 3: Standard price book for the subscription package plus product

Step 4: Standard price book for the extra user license product

Part B, Task 2: Create Standard Price Books

The screenshot shows the Salesforce Lightning interface with the following details:

- Page Title:** New Price Book Entry | Salesforce
- Page URL:** greeneratechnologies-dev-ed.lightning.force.com/lightning/o/PricebookEntry/new?count=7&nooverride=1&useRecordTypeCheck=1&navigationLocation=RELATIONSHIP
- Header:** The American Dream Academy | Hands-On Orgs
- Search Bar:** Search...
- Navigation:** Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products (selected), Orders, Contracts, Accounts, More.
- Left Sidebar (Product Detail View):**
 - Product:** Single License Subscription
 - Product Code:** Small-Sized Company Offering
 - Related:** Details, Price Books (0)
- Main Content Area:** New Price Book Entry
- Form Fields:**
 - * Product:** Single License Subscription (Active checked)
 - * Price Book:** Standard Price Book
 - * List Price:** 50
 - Use Standard Price:**
- Buttons:** Cancel, Save & New, Save
- Right Sidebar:** New Opportunity, New Case, Add Standard Price

Part B, Task 2: Create Standard Price Books

The screenshot shows the Salesforce interface for creating a new price book entry. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products (selected), Orders, Contracts, Accounts, and More. The main content area is titled "New Price Book Entry". The form fields are as follows:

- Product:** Subscription Package (selected)
- Active:** checked
- Price Book:** Standard Price Book (selected)
- List Price:** 200
- Use Standard Price:** unchecked

At the bottom right of the modal are three buttons: "Cancel", "Save & New", and "Save".

Part B, Task 2: Create Standard Price Books

The screenshot shows the Salesforce Lightning interface with the following details:

- Header:** The American Dream Academy | Hands-On Orgs | New Price Book Entry | Salesforce | Copy of Independent Project: Us...
- Page Title:** New Price Book Entry
- Form Fields:**
 - * Product:** Subscription Package Plus (Active checked)
 - * Price Book:** Standard Price Book
 - * List Price:** 400
 - Use Standard Price:** Unchecked checkbox
- Buttons:** Cancel, Save & New, Save
- Left Sidebar:** Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, More.
- Product Detail Panel:** Product: Subscription Package I, Product Code: Large-Sized Company Offering, Related: Price Books (0).

Part B, Task 2: Create Standard Price Books

The American Dream Academy | X | Hands-On Orgs | New Price Book Entry | Salesforce | Copy of Independent Project: User | +

greeneratechnologies-dev-ed.lightning.force.com/lightning/o/PricebookEntry/new?count=10&nooverride=1&useRecordTypeCheck=1&navigationLocation=REL...

Sales Home Opportunities Leads Tasks Price Books Files Notes Products Orders Contracts Accounts More

Product Extra User License

Product Code Large-Sized Company Offering

Related Details

Price Books (0)

New Price Book Entry

* Product: Extra User License Active:

* Price Book: Standard Price Book

* List Price: 35

Use Standard Price:

Add Standard Price

Cancel Save & New Save

This screenshot shows the 'New Price Book Entry' page in Salesforce. The 'Product' field is set to 'Extra User License'. The 'Price Book' field is set to 'Standard Price Book'. The 'List Price' field contains the value '35'. The 'Active' checkbox is checked. The 'Use Standard Price' checkbox is unchecked. The 'Save' button is highlighted.

Part B, Task 3: Create Custom Price Books



Inserted screenshots related to the custom price books I created, according to the following steps:

Step 1: The new price book for **nonprofit customers** I just created

Step 2: The new price book for **enterprise customers** I just created

Step 3: The updated price book for enterprise customers with the associated products

Step 4: The updated price book for nonprofit customers with the associated products showing the new prices

Part B, Task 3: Create Custom Price Books

The screenshot shows the Salesforce Lightning interface with the following details:

- Header:** The American Dream Academy | Hands-On Orgs | New Price Book | Salesforce | Copy of Independent Project: Us... | Error
- Search Bar:** Search...
- Navigation:** Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, More.
- Left Sidebar:** Price Books Recently Viewed (0 items, updated a minute ago). A modal window titled "New Price Book" is open over this sidebar.
- Modal Window:** Title: New Price Book.
 - Price Book Name:** Nonprofit (marked with a red asterisk)
 - Active:** Checked checkbox
 - Description:** Discounted rate for all subscription options for nonprofi...
 - Is Standard Price Book:** Unchecked checkbox
- Buttons at the bottom of the modal:** Cancel, Save & New, Save (highlighted in blue)

Part B, Task 3: Create Custom Price Books

The screenshot shows the Salesforce Lightning interface with the following details:

- Tab Bar:** Sales, Home, Opportunities, Leads, Tasks, Price Books (selected), Files, Notes, Products, Orders, Contracts, Accounts, More.
- Search Bar:** Search...
- Header:** Price Book Nonprofit (highlighted in purple), Edit, Clone, Delete.
- Related Panel:** Price Book Name: Nonprofit, Description: Discounted rate for all subscript, Created By: Ogbonna Ngwu, 29/12/2022.
- New Price Book Modal:**
 - Title:** New Price Book
 - Fields:**
 - Price Book Name:** Enterprise (marked with a red asterisk)
 - Active:**
 - Description:** Standard rate for all subscription options for enterprise
 - Is Standard Price Book:**
 - Buttons:** Cancel, Save & New, Save (highlighted in blue).

Part B, Task 3: Create Custom Price Books

The screenshot shows a Salesforce Lightning interface for a custom Price Book named "Enterprise". The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Price Books (which is the active tab), Files, Notes, Products, Orders, Contracts, Accounts, and More. A search bar and various global buttons are also present.

The main content area displays the "Enterprise" Price Book details. It includes sections for "Price Book Entries" (containing four entries) and "Price Book History" (containing one entry). The "Price Book Entries" section has columns for Product Name, Product Code, List Price, and Active status. The "Price Book History" section lists the date and field updated, along with the original and new values.

Product Name	Product Code	List Price	Active
Extra User License	Large-Sized Company Offering	€35.00	<input checked="" type="checkbox"/>
Single License Subscription	Small-Sized Company Offering	€50.00	<input checked="" type="checkbox"/>
Subscription Package	Medium-Sized Company Offering	€200.00	<input checked="" type="checkbox"/>
Subscription Package Plus	Large-Sized Company Offering	€400.00	<input checked="" type="checkbox"/>

[View All](#)

Date	Field	User	Original Value	New Value
29/12/2022, 10:34	Created	Ogbonna Ngwu		

[View All](#)

Part B, Task 3: Create Custom Price Books

The screenshot shows the Salesforce Lightning interface with the following details:

- Tab Bar:** The current tab is "Price Books". Other tabs include Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Products, Orders, Contracts, Accounts, and More.
- Page Header:** The page title is "Nonprofit | Salesforce" under "Copy of Independent Project: User".
- Search Bar:** A search bar with placeholder text "Search..." is located at the top center.
- Toolbar:** Standard toolbar icons for Edit, Clone, and Delete are visible on the right.
- Section Headers:** "Price Book" and "Nonprofit" are displayed prominently.
- Related Section:** "Price Book Entries (4)" is listed. An "Add Products" button is located in the top right corner of this section.
- Table:** A table lists four price book entries with columns: Product Name, Product Code, List Price, and Active.

Product Name	Product Code	List Price	Active
Extra User License	Large-Sized Company Offering	€26.00	<input checked="" type="checkbox"/>
Single License Subscription	Small-Sized Company Offering	€40.00	<input checked="" type="checkbox"/>
Subscription Package	Medium-Sized Company Offering	€160.00	<input checked="" type="checkbox"/>
Subscription Package Plus	Large-Sized Company Offering	€320.00	<input checked="" type="checkbox"/>
- Link:** "View All" is located below the table.
- Section Headers:** "Price Book History (1)" is listed.
- Table:** A table lists one history entry with columns: Date, Field, User, Original Value, and New Value.

Date	Field	User	Original Value	New Value
29/12/2022, 10:32	Created	Ogbonna Ngwu		
- Link:** "View All" is located below the history table.

Part B, Task 4:

Associate Price Books With Opportunities

I Inserted screenshots of your two in-progress opportunities showing the correct price books and products added to the products section of the opportunity record page. For each screenshot, I ensured the opportunity name is visible, along with the associated products and the correct prices, according to the following steps:

Step 1: FoodStars.Org opportunity record showing products/prices

Step 2: Yaloo Search opportunity record showing products/prices

Part B, Task 4:

Associate Price Books With Opportunities

The screenshot shows a Salesforce Opportunities page for the organization "FoodStars.org". The URL in the browser is greeneratechnologies-dev-ed.lightning.force.com/lightning/r/OpportunityLineItem/0068d0000AhMB0AAN/related/OpportunityLineItems/view. The page displays a single line item for an "Extra User License" with a quantity of 2.00, a sales price of €35.00, and a date of 31/12/2022. The line description notes "Needs extra two users". The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, and More. The header also features a search bar and various global buttons.

Opportunities > FoodStars.org
Products (Enterprise)

1 item • Sorted by Quantity • Updated a few seconds ago

Product	Quantity ↑	Sales Price	Date	Line Description
1 Extra User License	2.00	€35.00	31/12/2022	Needs extra two users

Part B, Task 4:

Associate Price Books With Opportunities

The screenshot shows the Salesforce Lightning interface with the following details:

- Header:** The American Dream Academy | Hands-On Orgs | Products (Enterprise) | Salesforce | Copy of Independent Project: Us | +
- Breadcrumbs:** Opportunities > Yaloo Search Products (Enterprise)
- Search Bar:** Search...
- Top Navigation:** Sales, Home, Opportunities, Leads, Tasks, Price Books, Files, Notes, Products, Orders, Contracts, Accounts, More.
- Buttons:** Add Products, Edit Products, Choose Price Book, Sort Products.
- Table:** OpportunityLineItem list view with the following data:

Product	Quantity ↑	Sales Price	Date	Line Description
Subscription Package Plus	1.00	€400.00	08/01/2023	Large-sized(10 users)

Part B, Task 5: Create Quotes

On the following slide, I added a screenshot of the Initial Quote record page for the Yaloo Search opportunity that I just made. I made sure the screenshot shows the name of the quote, the name of the account and opportunity, the quote line items, the grand total, and the updated quote status.

Part B, Task 5: Create Quotes

Sales Home Opportunities Leads Tasks Price Books Files Quotes Notes Products Orders Contracts More

Quote Initial Quote

Quote Number: 00000001 Expiration Date: 31/01/2023 Syncing: Opportunity Name: Yadoo Search Account Name: Yadoo Search Grand Total: €450.00

Status: Approved (Rejected, Presented, Accepted, Denied) Mark Status as Complete

Related Details

Quote Line Items (1)

Product	Sales Price	Quantity	Subtotal
Subscription Package Plus	€400.00	1.00	€400.00

Add Products Edit Products

View All

Quote PDFs (0)

Activity

New Event New Task Log a Call Email

Set up an event... Add

Filters: All time • All activities • All types Refresh • Expand All • View All

No activities to show. Get started by sending an email, scheduling a task, and more.

Part B, Task 6: Send Quotes



Inserted screenshots related to the quote I generated on the following slides.

Step 1: The PDF preview of the initial quote

Step 2: The draft email containing the PDF of the initial quote that I will send to Denise.

- *Made sure that the PDF attachment is visible in the email.*

Part B, Task 6: Send Quotes

The American Dream Academy | X | Hands-On Orgs | PDF Preview | Salesforce | Copy of Independent Project: Us... | +

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Quote/0Q08d0000000rCYCAY/view

Search...

PDF Preview

quoteTemplateDataViewer.apexp

1 / 1 | - 80% + | Download Print ...

Grenera Technologies

Company Address: NG
Created Date: 29/12/2022
Expiration Date: 31/01/2023
Quote Number: 00000001

Prepared By: Ogbonna Ngwu
Email: ngwu.princee@gmail.com

Bill To Name: Yaloo Search
Bill To: 19461 Greenview Ave.
New York
New York 10174
United States

Ship To Name: Yaloo Search
Ship To: 19461 Greenview Ave.
New York
New York 10174
United States

Product	Date	List Price	Sales Price	Quantity	Total Price
Subscription Package Plus	08/01/2023	€400.00	€400.00	1.00	€400.00

Subtotal: €400.00
Discount: 0.00%
Total Price: €400.00

Save and Email Quote | Save to Quote | Cancel

Quote PDFs (0)

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

Part B, Task 6: Send Quotes

The American Dream Academy | X | Hands-On Orgs | PDF Preview | Salesforce | Copy of Independent Project: Use | +

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Quote/0Q08d0000000rCYCAY/view

Search...

Sales Home

Quote Initial Quote

Quote Number
00000001

Related

Quote Line

Product

Subscription Package

Quote PDFs (1)

Name Discount Grand Total Created By

Approved Quote

Bcc ngwu.princeo@gmail.com X

Subject Approved Quote

Font Size B I U A

Hey {{Recipient.FirstName}},
Below is an attached copy of the Quote for the product that best meets your business needs.
Let me know about what your next step is as we close this deal.
Best Regards,
{{Sender.CompanyName}}

Powered by Salesforce
<http://www.salesforce.com/>

Initial Quote_V1

Send

New Case

Status as Complete

Email Add

No activities to show.
Get started by sending an email, scheduling a task, and more.

Part B, Task 7: Close the Deal



Inserted screenshots on the following slides showing I have correctly closed the Yaloo Search and FoodStars.org opportunities.

Step 1: Close the Yaloo Search opportunity as won.

- Ensured the screenshot shows the opportunity stage status updated accordingly.

Step 2: Close the FoodStars.org opportunity as lost.

- Ensured screenshot show the opportunity stage updated accordingly and the note I created explaining why it was closed.

Part B, Task 7: Close the Deal

The screenshot shows a Salesforce Opportunities page for an opportunity named "Yaloo Search". The opportunity details are as follows:

- Account Name: Yaloo Search
- Close Date: 29/12/2022
- Amount: €400.00
- Opportunity Owner: Ogbonna Ngwu

The stage history indicates the opportunity moved through various stages, ending at "Closed Won". A "Change Closed Stage" button is available for modification.

Activity tab is selected. Under Activity, there are buttons for New Task, Log a Call, New Event, and Email. A "Create a task..." input field and an "Add" button are present. Filters for activity types are set to "All time • All activities • All types".

Related section shows one product related to this opportunity:

- Products (1)**:
 - Subscription Package Plus
 - Quantity: 1.00
 - Sales Price: €400.00
 - Date: 08/01/2023

Notes & Attachments (1) section is also visible.

Part B, Task 7: Close the Deal

Sales Home Opportunities Leads Tasks Price Books Files Quotes Notes Products Orders Contracts Accounts More

Opportunity FoodStars.org

Account Name Close Date Amount Opportunity Owner
31/12/2022 €70.00 Ogbonna Ngwu

Prospecting Qualification Needs Analysis Value Proposit... Id. Decision M... Perception An... Proposal/Pric... Negotiation/R... **Closed Lost** Change Closed Stage

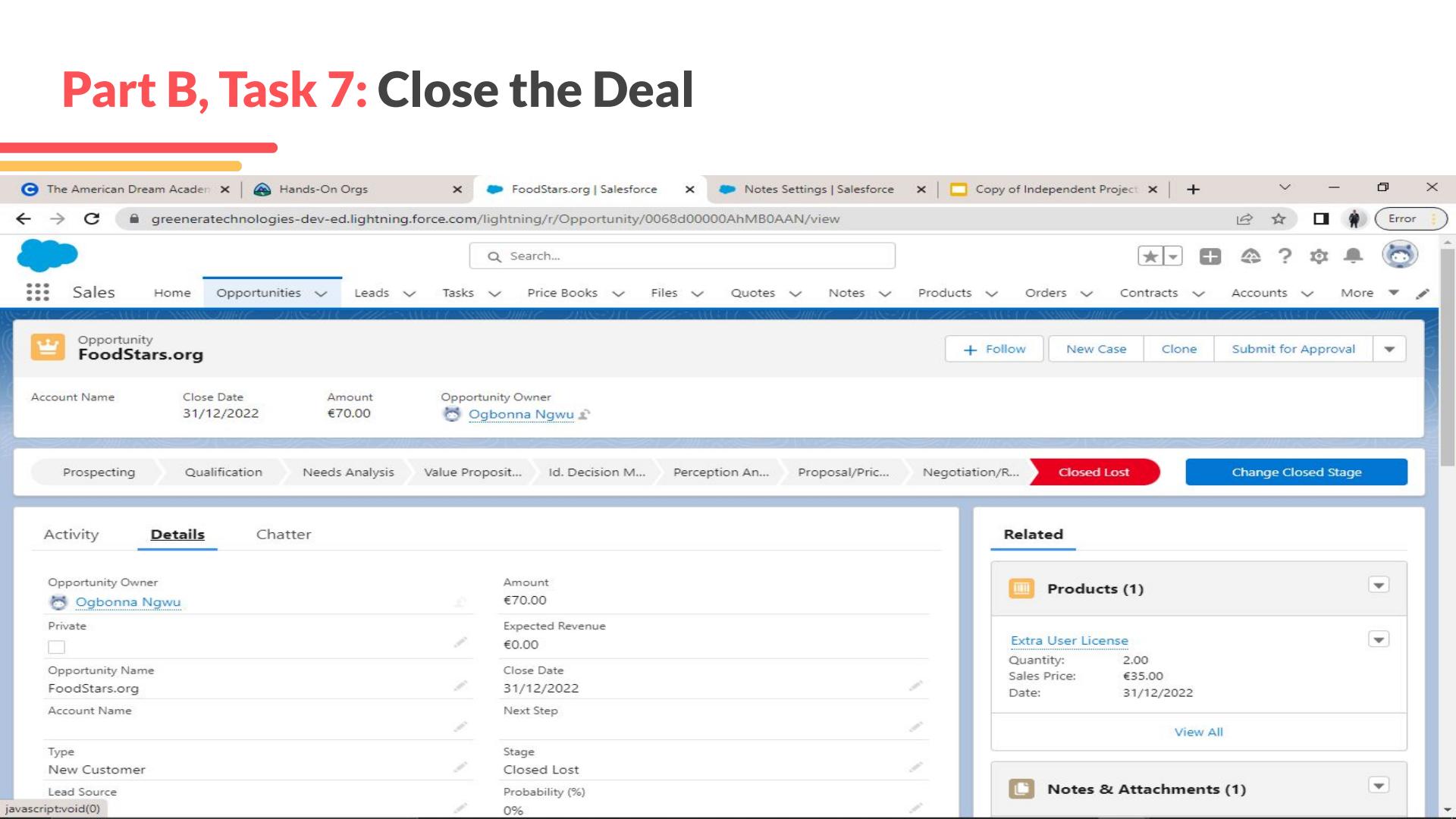
Activity **Details** Chatter

Opportunity Owner: Ogbonna Ngwu
Type: New Customer
Lead Source: javascript:void(0)

Amount: €70.00
Expected Revenue: €0.00
Close Date: 31/12/2022
Next Step:
Stage: Closed Lost
Probability (%): 0%

Related Products (1)
Extra User License
Quantity: 2.00
Sales Price: €35.00
Date: 31/12/2022

Notes & Attachments (1)





Sales

Home

Opportunities

Leads

Tasks

Price Books

Files

Quotes

Notes

Products

Orders

Contracts

Accounts

More

New

Recently viewed ▾

7 items

why not converted

29/12/2022, 11:40 by Ogbonna Ngwu

Hard no need for our product as a new CEO took over

why not converted

29/12/2022, 11:38 by Ogbonna Ngwu

Sandro had a meeting scheduled with Janet set for Nov 19th, but he received an email from her saying that her team is actually...

why not converted

03/12/2022, 12:41 by Ogbonna Ngwu

Martha New didn't answer the first call, so Sandro tried calling again per the task created in Salesforce earlier. They did n...

initial call summary

03/12/2022, 07:48 by Ogbonna Ngwu

Director of marketing operations at a large company so it's likely that there are multiple stakeholders we'll need to appeal to. Follo...

call summary

03/12/2022, 07:44 by Ogbonna Ngwu

follow-up call notes

03/12/2022, 07:30 by Ogbonna Ngwu

Has a social media marketing tool that she is satisfied with but has some definite needs that SimplySocial's tool can solve that hers...

Search...



why not converted

Visibility Set by Record



Hard no need for our product as a new CEO took over

Related to



View Version History

Delete

Share

Add to Records

Part B, Task 8: Create Contracts

On the following slide, I inserted a screenshot of the new contract for Yaloo Search that I just created, ensuring the account name, status, and contract term are visible.

Part B, Task 8: Create Contracts

Sales Home Opportunities Leads Tasks Price Books Files Quotes Notes Products Orders Contracts Accounts More

Contract **00000100**

New Contact New Opportunity New Case

Account Name Yaloo Search	Status Activated	Contract Start Date 31/12/2022	Contract End Date 30/12/2023	Contract Term (months) 12
--	---------------------	-----------------------------------	---------------------------------	------------------------------

Activated Draft [Mark Status as Complete](#)

Related Details

Contract Owner Ogbonna Ngwu	Status Activated
Contract Number 00000100	Contract Start Date 31/12/2022
Account Name Yaloo Search	Contract End Date 30/12/2023
Customer Signed By Denise	Contract Term (months) 12
Customer Signed Title	Owner Expiration Notice 30 Days
Customer Signed Date 2022-12-30T14:22:22 javascript:void(0);	Company Signed By

Activity

New Event New Task Log a Call Email

Set up an event... Add

Filters: All time • All activities • All types Refresh • Expand All • View All

No activities to show.
Get started by sending an email, scheduling a task, and more.

You have reached the end of Part B!

