



# Lead Management in Salesforce

Independent Project: Use Salesforce to Identify Sales Prospects

*Ngwu Ogbonna Prince*

# Part A Overview

- 
- 1 **Task 1:** Structure and Download Lead Data
  - 2 **Task 2:** Import Data in Salesforce
  - 3 **Task 3:** Create a List View and Filter for Leads
  - 4 **Task 4:** Associate Leads With a Campaign
  - 5 **Task 5:** Business Case Analysis

Software used: Trailhead playground and salesforce developer account





## Part A, Task 1: Structure and Download

### Lead Data

*After I finished cleaning up the data and fixing all the errors in the spreadsheet data, I inserted a screenshot of all the lead data in my spreadsheet. The columns in the spreadsheet, including:*

- First Name
- Last Name
- Title
- Company
- Phone Number
- Email



# Part A, Task 1: Screenshot

Screenshot of a Google Sheets document titled "Copy of Independent Project, Part A: Inbound Leads". The document contains a table with columns: First Name, Last Name, Title, Company, Phone Number, and Email. The "Title" column is currently selected.

	A	B	C	D	E	F
C1	First Name	Last Name	Title	Company	Phone Number	Email
1	Thandiwe	Bandi	Social Media Marketer	Jazz Mystics Music Group	(441) 709-5905	tbandi@jazzmystics.com
2	Denise	Choi	Director of Marketing Operations	Yaloo Search	(824) 617-6033	dchoi@yaloooyos.com
3	Chidi	Seydou	Social Media Intern	Attitude Talent Agency	(851) 923-3824	chidiseydou415@attitude.com
4	Manisha	Visvanathan	Senior Growth Marketing Mana	Growlers and Stuff Craft Brewery	(326) 598-4003	manishavavis@growlers.com
5	Janet	Steinberg	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com
6	Lawrence	Ramirez	Digital Marketing Manager	Collection Consulting Group	(346) 269-7771	lawrence@collectionconsulting.co
7	Martha	Newman	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org
8	Kiran	Stefcia	Director of Marketing	Kiran and Co Marketers	(347) 810-3329	kiranstefcia@marketersco.com
9	Jay	Farley	Content Marketing Manager	Random Wishes Builders	(735) 716-5095	jayfarley1985@wishes.com
10	Danika	Marcia	Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	danika@tedstoys.com
11						
12						
13						

The bottom of the screenshot shows the Windows taskbar with various icons and the system tray indicating the date and time (8:17 AM, 11/16/2022).



## Part A, Task 2: Import Data in Salesforce

I navigated to the App launcher and opened the Sales app to the Leads tab. Organized the lead list so that the most recently created leads appear first. Then, inserted a screenshot to show all 10 of the leads that I just uploaded on the following slide.



# Part A, Task 2: Screenshot

Salesforce screenshot showing the Leads page in the Lightning interface.

The browser address bar shows the URL: greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Lead/list?filterName=00B8d00000AMB9IEAT

The page title is "Today's Leads".

The Leads tab is selected in the top navigation bar.

The main content area displays a table of 10 leads:

	Name ↑	Company	Email	Lead Status	Created Date	Own...	U...
1	Chidi Seydou	Attitude Talent Agency	chidiseydou415@attitude.com	Open - Not Contact...	16/11/2022, 16:...	ONgwu	<input checked="" type="checkbox"/>
2	Danika Marcia	Ted's Toy Shop	danika@tedstoys.com	Open - Not Contact...	16/11/2022, 16:...	ONgwu	<input checked="" type="checkbox"/>
3	Denise Choi	Yaloo Search	dchoi@yaloooyos.com	Open - Not Contact...	16/11/2022, 16:...	ONgwu	<input checked="" type="checkbox"/>
4	Janet Steinberg	Costumez Warehouse	janet.steinberg@costumez.com	Open - Not Contact...	16/11/2022, 16:...	ONgwu	<input checked="" type="checkbox"/>
5	Jay Farley	Random Wishes Builders	jayfarley1985@wishes.com	Open - Not Contact...	16/11/2022, 16:...	ONgwu	<input checked="" type="checkbox"/>
6	Kiran Stefcia	Kiran and Co Marketers	kiranstefcia@marketersco.com	Open - Not Contact... <input type="button" value="Edit"/>	16/11/2022, 16:...	ONgwu	<input checked="" type="checkbox"/>
7	Lawrence Ramirez	Collection Consulting Group	lawrence@collectionconsulting....	Open - Not Contact...	16/11/2022, 16:...	ONgwu	<input checked="" type="checkbox"/>
8	Manisha Visvanath...	Growlers and Stuff Craft Brewe...	manishavis@growlers.com	Open - Not Contact...	16/11/2022, 16:...	ONgwu	<input checked="" type="checkbox"/>
9	Martha Newman	FoodStars.Org	martha.newman@foodstars.org	Open - Not Contact...	16/11/2022, 16:...	ONgwu	<input checked="" type="checkbox"/>
10	Thandiwe Bandi	Jazz Mystics Music Group	tbandi@jazzmystics.com	Open - Not Contact...	16/11/2022, 16:...	ONgwu	<input checked="" type="checkbox"/>

At the bottom, there is a search bar with placeholder text "Type here to search" and a system tray with icons for search, file, internet, messaging, and power.



## Part A, Task 3: Create a List View and Filter for Leads

---

---

---

*I Inserted screenshot of the Demo leads list view for each of the steps below in the following slides. My screenshots showed that I have:*

Step 1: Created a clone of the leads view titled “Demo Leads”

Step 2: Added a filter to only be able to see leads that are open and haven’t been contacted

Step 3: Made sure all noted fields are visible and in the right order

Step 4: Created a separate tab for the leads.



# Part A, Task 3: Step 1 screenshot

Salesforce screenshot showing the Leads page for the "Demo Leads" filter.

The browser address bar shows the URL: greenertechnologies-dev-ed.lightning.force.com/lightning/o/Lead/list?filterName=00B8d00000AeVcKEAV

The page title is "Demo Leads | Lead".

The navigation bar includes Sales, Home, Opportunities, Leads (selected), Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, and More.

The Leads section displays 10 items:

	Name	Company	Email	Lead Status	Created Date	Owner
1	Chidi Seydou	Attitude Tale...	chidiseydou...	Open - Not ...	16/11/2022,...	Ongwu
2	Danika Marcia	Ted's Toy Sh...	danika@ted...	Open - Not ...	16/11/2022,...	Ongwu
3	Denise Choi	Yaloo Search	dchoi@yalo...	Open - Not ...	16/11/2022,...	Ongwu
4	Janet Steinb...	Costumez W...	janet.steinb...	Open - Not ...	16/11/2022,...	Ongwu
5	Jay Farley	Random Wi...	jayfarley198...	Open - Not ...	16/11/2022,...	Ongwu
6	Kiran Stefcia	Kiran and C...	kiranstefcia...	Open - Not ...	16/11/2022,...	Ongwu
7	Lawrence Ra...	Collection C...	lawrence@c...	Open - Not ...	16/11/2022,...	Ongwu
8	Manisha Vis...	Growlers an...	manishavis...	Open - Not ...	16/11/2022,...	Ongwu
9	Martha New...	FoodStars.Org	martha.new...	Open - Not ...	16/11/2022,...	Ongwu
10	Thandiwe B...	Jazz Mystics...	tbandi@jazz...	Open - Not ...	16/11/2022,...	Ongwu

The "Filters" sidebar shows the following filters applied:

- Filter by Owner: All leads
- Matching all of these filters:
  - Created Date equals TODAY

Buttons for "Add Filter" and "Remove All" are visible.

The status bar at the bottom shows "javascript:void(0);", the date "11/16/2022", and the time "9:07 AM".



# Part A, Task 3: Step 2 screenshot

The screenshot shows a Salesforce Lightning interface for the "Demo Leads" page. The top navigation bar includes tabs for "The American Dream", "Lead Management", "Copy of Independence", "Copy of Independence", "Hands-On Orgs", and "Demo Leads | Lead". The URL in the address bar is <greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Lead/list?filterName=00B8d00000AeVcKEAV>. The page title is "Demo Leads".

The main content area displays a table of 10 leads, each with a checkbox, name, company, status, email, lead status, created date, owner, and update actions. The leads listed are:

	Name	Company	Status	Email	Lead Status	Created Date	Owner	Action
1	Chidi Seydou	Attitude Tale...	Open - Not ...	chidiseydou...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
2	Danika Marcia	Ted's Toy Sh...	Open - Not ...	danika@ted...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
3	Denise Choi	Yaloo Search	Open - Not ...	dchoi@yalo...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
4	Janet Steinb...	Costumez W...	Open - Not ...	janet.steinb...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
5	Jay Farley	Random Wi...	Open - Not ...	jayfarley198...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
6	Kiran Stefcia	Kiran and C...	Open - Not ...	kiranstefcia...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
7	Lawrence Ra...	Collection C...	Open - Not ...	lawrence@c...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
8	Manisha Vis...	Growlers an...	Open - Not ...	manishavis...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
9	Martha New...	FoodStars.Org	Open - Not ...	martha.new...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>
10	Thandiwe B...	Jazz Mystics...	Open - Not ...	tbandi@jazz...	Open - Not ...	16/11/2022,...	ONgwu	<input checked="" type="checkbox"/>

On the right side, there is a "Filters" sidebar with the following settings:

- Filter by Owner: All leads
- Matching all of these filters:
  - Created Date equals TODAY
  - Lead Status equals Open - Not Contacted
- Add Filter
- Remove All
- Add Filter Logic

The bottom of the screen shows the Windows taskbar with the search bar containing "Type here to search" and various pinned icons.



# Part A, Task 3: Step 3 screenshot

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter More

Leads Demo Leads

10 items • Sorted by Company • Filtered by All leads - Created Date, Lead Status • Updated a few seconds ago

	Name	Lead Status	Title	Company	Phone	Email
1	Chidi Seydou	Open - Not Contacted	Social Media Intern	Attitude Talent Agency	(851) 923-3824	chidiseydou415@attitude.com
2	Lawrence Ramirez	Open - Not Contacted	Digital Marketing Manager	Collection Consulting ...	(346) 269-7771	lawrence@collectionconsulting.com
3	Janet Steinberg	Open - Not Contacted	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com
4	Martha Newman	Open - Not Contacted	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org
5	Manisha Visvanath...	Open - Not Contacted	Senior Growth Marketing Manager	Growlers and Stuff Cra...	(326) 598-4003	manishavis@growlers.com
6	Thandiwe Bandi	Open - Not Contacted	Social Media Marketer	Jazz Mystics Music Gr...	(441) 709-5905	tbandi@jazzmystics.com
7	Kiran Stefcia	Open - Not Contacted	Director of Marketing	Kiran and Co Marketers	(347) 810-3329	kiranstefcia@marketersco.com
8	Jay Farley	Open - Not Contacted	Content Marketing Manager	Random Wishes Build...	(735) 716-5095	jayfarley1985@wishes.com
9	Danika Marcia	Open - Not Contacted	Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	danika@tedstoys.com
10	Denise Choi	Open - Not Contacted	Director of Marketing	Yaloo Search	(824) 617-6033	dchoi@yalooovos.com

Type here to search

9:29 AM 11/16/2022



# Part A, Task 3: Step 4 screenshot

The screenshot shows a Salesforce Lightning interface for managing leads. The top navigation bar includes tabs for "The American Dream", "Lead Management", "Copy of Independence", "Copy of Independence", "Hands-On Orgs", "Demo Leads | Leads", and a new tab icon. The URL in the address bar is <greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Lead/list?filterName=00B8d00000AeVcKEAV>. The page title is "Demo Leads".

The main content area displays a list of leads with the following columns: Name, Lead Status, Title, Company, Phone, and Email. The leads are sorted by Company and updated 6 minutes ago. The list includes:

	Name	Lead Status	Title	Company	Phone	Email
1	Chidi Seydou	Open - Not Contacted	Social Media Intern	Attitude Talent Agency	(851) 923-3824	chidiseydou415@attitude.com
2	Lawrence Ramirez	Open - Not Contacted	Digital Marketing Manager	Collection Consulting ...	(346) 269-7771	lawrence@collectionconsulting.com
3	Janet Steinberg	Open - Not Contacted	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com
4	Martha Newman	Open - Not Contacted	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org
5	Manisha Visvanath...	Open - Not Contacted	Senior Growth Marketing Manager	Growlers and Stuff Cra...	(326) 598-4003	manishavis@growlers.com
6	Thandiwe Bandi	Open - Not Contacted	Social Media Marketer	Jazz Mystics Music Gr...	(441) 709-5905	tbandi@jazzmystics.com
7	Kiran Stefcia	Open - Not Contacted	Director of Marketing	Kiran and Co Marketers	(347) 810-3329	kiranstefcia@marketersco.com
8	Jay Farley	Open - Not Contacted	Content Marketing Manager	Random Wishes Build...	(735) 716-5095	jayfarley1985@wishes.com
9	Danika Marcia	Open - Not Contacted	Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	danika@tedstoys.com
	Denise Choi	Open - Not Contacted	Director of Marketing	Yaloo Search	(824) 617-6033	dchoi@yalooovos.com

The bottom of the screen shows the Windows taskbar with the Start button, a search bar, and icons for File Explorer, Google Chrome, Microsoft Word, and Microsoft Excel. The system tray shows the date and time as 9:34 AM on 11/16/2022, along with battery and signal strength indicators.



## Part A, Task 4: Associate Your Leads with a Campaign

---

---

*After I associated all 10 leads with the new campaign, I navigated to the Campaigns tab of the Sales app, took a screenshot of the Campaign Members page of the Social Media Conference Email that shows all the leads I have just associated with this campaign, and insert it on the next slide.*



# Part A, Task 4: Screenshot

Salesforce screenshot showing the Campaign Members page for a specific campaign.

The browser address bar shows the URL: greenertechnologies-dev-ed.lightning.force.com/lightning/r/7018d000000PqROAA0/related/CampaignMembers/view

The page title is "Campaigns > Social Media Conference Email Campaign Campaign Members".

The table displays 10 items, sorted by Last Modified Date, updated a few seconds ago.

	Type	Status	Name	Title	First Name	Last Name	Company
1	Lead	Responded	Chidi Seydou	Social Media Intern	Chidi	Seydou	Attitude Talent Agency
2	Lead	Responded	Lawrence Ramirez	Digital Marketing Manager	Lawrence	Ramirez	Collection Consulting Group
3	Lead	Responded	Janet Steinberg	Social Media Marketing Manager	Janet	Steinberg	Costumez Warehouse
4	Lead	Responded	Martha Newman	Social Media Marketing Manager	Martha	Newman	FoodStars.Org
5	Lead	Responded	Manisha Visvanathan	Senior Growth Marketing Manager	Manisha	Visvanathan	Growlers and Stuff Craft Brewery
6	Lead	Responded	Thandiwe Bandi	Social Media Marketer	Thandiwe	Bandi	Jazz Mystics Music Group
7	Lead	Responded	Kiran Stefcia	Director of Marketing	Kiran	Stefcia	Kiran and Co Marketers
8	Lead	Responded	Jay Farley	Content Marketing Manager	Jay	Farley	Random Wishes Builders
9	Lead	Responded	Danika Marcia	Junior Marketing Associate	Danika	Marcia	Ted's Toy Shop
10	Lead	Responded	Denise Choi	Director of Marketing Operations	Denise	Choi	Yaloo Search

Page navigation: Back, Forward, Stop, Refresh, Home, Search, Favorites, Plus, Minus, Close, More.

System status: 9:58 AM, 11/16/2022, 28 notifications.



## Part A, Task 5: Business Case Analysis

*In a short paragraph on the following slide, I described how imported and organized data in Salesforce would help the sales and marketing teams at SimplySocial. In my description, I included:*

- The overall purpose of importing and organizing data.
- The major steps I took to import and organize data.
- How the sales and marketing teams at SimplySocial would benefit from imported and organized lead data in Salesforce.

## Part A, Task 5: Written response

1. Overall purpose of importing data to salesforce: this will help keep the data in a central place to be accessible to both the marketing and sales department and enhance collaboration and sales/marketing operations.
2. Overall steps: i took the data, cleaned it. I used the import wizard in salesforce to import the csv file. I created View filter to only have the important data i am working with. I removed the unnecessary columns and created a filter on the Lead status column. I associated the leads to a campaign.
3. Simplicity of marketing and Sales teams will have access to central database that organises and keeps the workflow in order for easy reference, leads status update, task tracking etc

You have reached the end of Part A!



## Part B Overview

- 
- 1 Task 1: Filter Leads to Decide Who to Approach
  - 2 Task 2: Initiate Contact With Leads via Email
  - 3 Task 3: Continue Contact With Leads via Calls
  - 4 Task 4: Mark Leads as Hot
  - 5 Task 5: Create Email Templates
  - 6 Task 6: Convert Leads





## Part B Task 1: Filter Leads

*After creating the necessary filter for the Demo Leads list, I inserted a screenshot showing the list with the leads filtered by manager. I adjusted the size of the Title column so that all the leads' titles can be read.*



# Part B Task 1: Screenshot

The screenshot shows a browser window displaying the Salesforce Lightning interface. The URL in the address bar is `greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Lead/list?filterName=00B8d00000AeVcKEAV`.

The page title is "Demo Leads | Leads | Salesforce". The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar.

The main content area shows a list of leads titled "Demo Leads". The table columns are Name, Lead Status, Title, Company, and Phone. The leads listed are:

	Name	Lead Status	Title	Company	Phone
1	Janet Steinberg	Open - Not Contacted	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836
2	Jay Farley	Open - Not Contacted	Content Marketing Manager	Random Wishes Build...	(735) 716-5095
3	Lawrence Ramirez	Open - Not Contacted	Digital Marketing Manager	Collection Consulting ...	(346) 269-7771
4	Manisha Visvanath...	Open - Not Contacted	Senior Growth Marketing Manager	Growlers and Stuff Cra...	(326) 598-4003
5	Martha Newman	Open - Not Contacted	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927

A sidebar on the right contains a "Filters" section with three active filters:

- Filter by Owner: All leads
- Matching all of these filters
- Lead Status equals Open - Not Contacted
- Title contains manager

At the bottom of the screen, there is a taskbar with icons for File, Home, Recent, and a search bar. The system tray shows the date and time as 2:58 PM, 12/2/2022.



## Part B Task 2: Initiate Contact with Leads via Email

*I Inserted screenshots to show that I emailed Janet, Thandiwe, Martha, and Denise. My screenshots display the past activities log for each of these leads showing that I have sent them an email. The past activities log is at the bottom of the Activity tab.*

**Step 1:** Past activity for **Janet Steinberg** showing I emailed them.

**Step 2:** Past activity for **Thandiwe Bandi** showing I emailed them.

**Step 3:** Past activity for **Martha Newman** showing I emailed them.

**Step 4:** Past activity for **Denise Choi** showing I emailed them.



## Part B Task 2: Step 1 screenshot

The screenshot shows a browser window displaying the Salesforce Lightning interface for a Lead record. The URL is [greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvHEAU/view](https://greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvHEAU/view).

The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar. The Leads tab is currently selected.

The main content area displays the Lead record for **Martha Newman**. It features a compose button to send an email, filters for activities, and sections for Upcoming & Overdue activities, December 2022 activity, and a recent email from **Toolkit for managers** to **Martha Newman**.

The right sidebar contains sections for **this Lead**, **Notes (0)**, **Campaign History (1)** (Social Media Conference Email Campaign), and a summary of campaign details: Start Date: 24/07/2022, Type: Email, Status: Responded.

The bottom of the screen shows the Windows taskbar with various pinned icons and a system tray indicating the date and time as 3:11 PM on 12/2/2022.



# Part B Task 2: Step 2 screenshot

The screenshot shows a Salesforce Lightning interface for a Lead named Chidi Seydou. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar. A sidebar on the left displays activity history for December 2022 and November 2022, showing an unopened email from the user to Chidi Seydou. The main content area shows a single campaign history entry for a Social Media Conference Email Campaign, which started on 24/07/2022, was an email type, and the status is Responded. The bottom of the screen shows a taskbar with various application icons and the system clock indicating 3:21 PM on 12/2/2022.

Chidi Seydou | Salesforce

greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvDEAU/view

Sales

Leads

Tasks

Notes

Accounts

Contacts

Campaigns

Dashboards

More

Lead  
**Chidi Seydou**

Upcoming & Overdue

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

December • 2022

Manager's easy-life tools  
You sent an email to Chidi Seydou

This Month

Unopened 23:20 | Today

November • 2022

Lets.get.in touch  
You sent an email to Chidi Seydou

Last Month

Bounced 19:01 | 27 Nov

Campaign History (1)

Social Media Conference Email Campaign

Start Date: 24/07/2022  
Type: Email  
Status: Responded

View All

Type here to search

3:21 PM  
12/2/2022



# Part B Task 2: Step 3 screenshot

The screenshot shows a web browser window displaying the Salesforce Lightning interface. The URL in the address bar is [greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvIEAU/view](https://greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvIEAU/view). The top navigation bar includes tabs for Sales, Home, Opportunities, Leads (selected), Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar. A sidebar on the left lists recent activities: an email to Kiran Stefcia (Unopened, 23:30 | Today), a product demo meeting (Last Month, 15:45 | 22 Nov), a first conversation (18 Nov), and another email to Kiran Stefcia (Bounced, 16:23 | 18 Nov). To the right, there are sections for "Campaign History (1)" showing a "Social Media Conference Email Campaign" (Start Date: 24/07/2022, Type: Email, Status: Responded) and a "View All" button. The bottom of the screen shows the Windows taskbar with the Start button, a search bar, and icons for File Explorer, Edge, File, Word, Excel, and Google Chrome, along with system status icons and the date/time (3:30 PM, 12/2022).



# Part B Task 2: Step 4 screenshot

Salesforce interface screenshot showing a Lead record for Janet Steinberg and a Campaign History panel.

**Lead Record:**

- Lead Name: Janet Steinberg
- Lead Type: Lead
- Follow button: + Follow
- Action buttons: New Case, Submit for Approval, Clone

**Campaign History (1):**

Campaign History (1)	
Social Media Conference Email Campaign	
Start Date:	24/07/2022
Type:	Email
Status:	Responded

**Task List:**

- Upcoming & Overdue:**
  - Send package details (Due 19 Nov)
- December • 2022:**
  - Manager's life saver! (Unopened, 07:20 | Today)
- November • 2022:**
  - Follow up call (17:00 | 19 Nov)
  - Initial Prospective Call (18 Nov)

**System Navigation:**

- Salesforce Cloud icon
- Salesforce Home icon
- Salesforce Opportunities icon
- Salesforce Leads icon (selected)
- Salesforce Tasks icon
- Salesforce Files icon
- Salesforce Notes icon
- Salesforce Accounts icon
- Salesforce Contacts icon
- Salesforce Campaigns icon
- Salesforce Dashboards icon
- Salesforce More icon

**System Status:**

- Search bar: Search...
- Star icon: Favorites
- Plus icon: New
- Map icon: Locations
- Question mark icon: Help
- Gear icon: Settings
- Bell icon: Notifications
- User icon: Profile
- Date/Time: 11:21 PM  
12/2022



## Part B Task 3: Continue Contact with Leads via Calls

*I Inserted screenshots for the calls with the four leads. My screenshots display the past activity logs for each of these leads showing that calls, notes, tasks, and/or emails have been logged with each of them. The past activities log is at the bottom of the Activity tab.*

Step 1: Past activity for Janet Steinberg showing logged activities.

Step 2: Past activity for Thandiwe Bandi showing logged activities.

Step 3: Past activity for Martha Newman showing logged activities.

Step 4: Past activity for Denise Choi showing logged activities.



# Part B Task 3: Step 1 screenshot

The screenshot shows a browser window displaying the Salesforce Lightning interface for a user named Janet Steinberg. The URL in the address bar is [greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvFEAU/view](https://greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvFEAU/view).

The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar. The Leads tab is currently selected.

The main content area displays a list of tasks under the "Upcoming & Overdue" section. One task is listed: "Send package details" (status: Unopened, due date: 19 Nov). Below this, sections for "December • 2022" and "November • 2022" show other tasks: "Manager's life saver!" (status: Unopened, due date: 07:20 | Today) and "Follow up call" (status: Unopened, due date: 17:00 | 19 Nov), respectively.

To the right, there are two panels: "Notes (1)" containing a note about a follow-up call to Ogbonna Ngwu, and "Campaign History (1)" for a "Social Media Conference Email Campaign" with details: Start Date: 24/07/2022, Type: Email, Status: Responded.

The bottom of the screen shows the Windows taskbar with various pinned icons and a system tray indicating the date and time as 11:32 PM on 12/2022.



# Part B Task 3: Step 2 screenshot

The screenshot shows a Microsoft Edge browser window displaying the Salesforce Lightning interface. The user is on the Leads page, which lists various leads with their names, contact details, and activity history. The interface includes a navigation bar at the top with links for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, and More. A search bar and a toolbar with various icons are also present. On the right side of the screen, there is a sidebar with sections for "Need for product" (a lead from 18/11/2022) and "Campaign History (1)" (a Social Media Conference Email Campaign from 24/07/2022). The bottom of the screen shows the Windows taskbar with the Edge browser icon and the system tray.

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

follow up call

You have an upcoming task

11 Dec

December • 2022

Manager dream tools

You sent an email to Kiran Stefcia

Last opened 41 minutes ago 23:30 | Yesterday

This Month

November • 2022

product demo meeting

You had an event

15:45 | 22 Nov

Last Month

first conversation

You logged a call

18 Nov

Bounced

Lets get in touch!

You sent an email to Kiran Stefcia

16:23 | 18 Nov

Need for product

18/11/2022, 17:15 by Ogbonna Ngwu

lead is interested in the product because they have been growing to help them manage resources for employees...

View All

Campaign History (1)

Social Media Conference Email Campaign

Start Date: 24/07/2022

Type: Email

Status: Responded

View All

11:39 PM  
12/2/2022



# Part B Task 3: Step 3 screenshot

The screenshot shows a browser window with two tabs open. The active tab is titled "Chidi Seydou | Salesforce" and displays the Lead detail page for "Chidi Seydou".

The Lead details include:

- Lead Name: Chidi Seydou
- Follow-up event call: You have an upcoming event (08:00 | 17 Dec)
- Send platform description: You have an upcoming task (17 Dec)
- Manager's easy-life tools: You sent an email to Chidi Seydou (Bounced, 23:20 | Yesterday)
- Lets get in touch: You sent an email to Chidi Seydou (Bounced, 19:01 | 27 Nov)

The sidebar shows activity history for December 2022, November 2022, and This Month. A sidebar panel displays "Campaign History (1)" for a "Social Media Conference Email Campaign" with a start date of 24/07/2022, type Email, and status Responded.

At the bottom, there is a search bar and a status bar showing the time as 11:54 PM and the date as 12/2/2022.



# Part B Task 3: Step 4 screenshot

The screenshot shows a browser window displaying the Salesforce Lightning interface. The URL in the address bar is `greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvHEAU/view`.

The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and a search bar. The Leads tab is currently selected.

The main content area displays a Lead record for **Martha Newman**. On the left, there's a sidebar with sections for Upcoming & Overdue tasks and events, and a December 2022 activity feed. A note at the bottom indicates an email was sent to Martha Newman.

On the right, there are two panels: **Notes (1)** containing a single note about a call summary, and **Campaign History (1)** for a Social Media Conference Email Campaign, which started on 24/07/2022, was an Email type, and the status is Responded.

The bottom of the screen shows the Windows taskbar with various pinned icons and a search bar.



## Part B Task 4: Mark Leads as Hot

I added a screenshot showing the leads marked as hot and warm on the leads list. Made sure that “Rating” is a displayed field on the leads list and that I have organized the list so that hot and warm leads appear first.



# Part B Task 4: Screenshot

The screenshot shows a web browser displaying the Salesforce Lightning interface. The URL in the address bar is `greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Lead/list?filterName=00B8d00000AMb65EAD`. The page title is "All Open Leads | Leads | Salesforce".

The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, More, and various icons for search, import, and export.

The main content area is titled "Leads All Open Leads" and displays a table of 25 items. The columns are: Name, Company, Email, Lead Status, Owner AI..., and Rating. The data is as follows:

	Name	Company	Email	Lead Status	Owner AI...	Rating
1	Janet Steinberg	Costumez Warehouse	janet.steinberg@costumez.com	Working - Contacted	ONgwu	Warm
2	David Monaco	Blues Entertainment Corp.	david@blues.com	Working - Contacted	ONgwu	Warm
3	Kiran Stefcia	Kiran and Co Marketers	kiranstefcia@marketersco.com	Working - Contacted	ONgwu	Hot
4	Martha Newman	FoodStars.Org	martha.newman@foodstars.org	Working - Contacted	ONgwu	Hot
5	Bertha Boxer	Farmers Coop. of Florida	bertha@fcof.net	Working - Contacted	ONgwu	Hot
6	Danika Marcia	Ted's Toy Shop	danika@tedstoys.com	Open - Not Contacted	ONgwu	
7	Jay Farley	Random Wishes Builders	jayfarley1985@wishes.com	Open - Not Contacted	ONgwu	
8	Lawrence Ramirez	Collection Consulting Group	lawrence@collectionconsulting.com	Open - Not Contacted	ONgwu	
9	Manisha Visvanathan	Growlers and Stuff Craft Brewery	manishavis@growlers.com	Open - Not Contacted	ONgwu	
10	Chidi Seydou	Attitude Talent Agency	chidiseydou415@attitude.com	Working - Contacted	ONgwu	
11	Denise Choi	Yaloo Search	dchoi@yaloooyos.com	Open - Not Contacted	ONgwu	
12	Thandiwe Bandi	Jazz Mystics Music Group	tbandi@jazzmystics.com	Open - Not Contacted	ONgwu	

The bottom of the screen shows the Windows taskbar with the search bar containing "Type here to search" and the date/time "12:05 AM 12/3/2022".



## Part B Task 5: Create Email Templates

*Added a screenshot showing an email that can be sent to either Martha Newsom or Denise Choi. The email include a merge field for the recipient's first name.*



## Part B Task 5: Screenshot

Sales Home Opportunities

Email Templates All Templates

1 item • Refresh this list to view the latest changes

1 Email Template Name Initial outreach

Message Content

Subject: We miss you talking to us!

Enhanced Letterhead: Search Enhanced Letterheads...

HTML Value:

```
Hi {{Recipient.FirstName}}
```

We know you have a busy schedule, but we still want to talk to you again.  
We sent an email last week, but do not bother about it, here is the summary:  
We wanted to get a response from you on the status of your company's budget for the software update.

We are all waiting to hear from you, it's our task to serve you to satisfaction!

Regards  
{{Sender.FirstName}}

Cancel Save

The screenshot shows a Salesforce interface for creating a new email template. The main window displays the 'Message Content' section with a subject line 'We miss you talking to us!' and an enhanced letterhead search bar. Below is an 'HTML Value' editor containing a greeting, a message body with a summary of previous communication, and a closing statement. The sidebar on the left lists 'Email Templates' and 'All Templates', showing one item named 'Initial outreach'. The top navigation bar includes links for Sales, Home, and Opportunities, along with the Salesforce logo. A bottom navigation bar shows standard desktop icons like File, Home, and Help, along with system status indicators like battery level and signal strength. The status bar at the bottom right shows the date and time as 12/3/2022 4:32 AM.



Type here to search





## Part B Task 6: Convert Leads

*Inserted screenshots on the following slides to show the updates I have made to each lead according to the directions below:*

**Step 1: Screenshot Thandiwe Bandi's lead record page.**

- Made sure screenshot shows the lead's name, the note I created, and that their lead status in the lead path is updated to Closed – Not Converted.

**Step 2: Screenshot Janet Steinberg's lead record page.**

- Made sure that the screenshot shows the lead's name, the note I created, and that their lead status in the lead path is updated to Closed – Not Converted.

**Step 3: Screenshot the popup after converting Martha Newman.**

- This is the popup labeled "Your lead has been converted". Made sure that the screenshot shows the Account, Contact, and Opportunity that have been created.

**Step 4: Screenshot the popup after converting Denise Choi.**

- Made sure to show that an Account, Contact, and Opportunity have been created.



# Part B Task 6: Step 1 screenshot

Salesforce screenshot showing a Lead record for Martha Newman.

**Lead Details:**

- Title: Social Media Marketing Manager
- Company: FoodStars.Org
- Phone: (323) 784-7927
- Email: martha.newman@foodstars.org

The Lead status is **Closed - Not Converted**.

**Activity:**

- New Task
- Log a Call
- New Event
- Email

A button to **Create a task...** and an **Add** button.

**Related:**

- We found no potential duplicates of this Lead.
- Notes (2)**
  - 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...
  - call summary  
03/12/2022, 07:44 by Ogbonna Ngwu

**Upcoming & Overdue:**

- Research on budget size (due 17 Dec)

Windows taskbar at the bottom:

- Type here to search
- Icons for File Explorer, Mail, Google Chrome, Microsoft Word, Microsoft Excel, and Google Chrome.
- System tray icons for battery, signal, volume, and date/time (4:42 AM, 12/3/2022).



# Part B Task 6: Step 2 screenshot

Salesforce screenshot showing a Lead record for Janet Steinberg.

**Lead Details:** Janet Steinberg (Lead), Lead ID: 00Q8d000008aMvFEAU, Status: Closed - Not Converted.

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

**Related:** We found no potential duplicates of this Lead. Notes (2): Why not converted (03/12/2022, 12:45 by Ogbonna Ngwu). Sandro had a meeting scheduled with Janet set for Nov 19th, but he received an email from her saying that her...

**Bottom Navigation:** Send package details, Type here to search, Taskbar icons (File Explorer, Edge, Google Chrome, Word, Excel, Power BI), Date: 19 Nov, Time: 4:46 AM, Date: 12/3/2022.



# Part B Task 6: Step 3 screenshot

The screenshot shows a Salesforce Lightning interface. At the top, there are several tabs: "The American Dream Aca...", "Project Instructions | Cour...", "Copy of Independent Proj...", "Hands-On Orgs", and "Kiran Stefcia | Salesforce". The main content area displays a success message: "Your lead has been converted". Below this is a decorative illustration of a flag on a rocky mountain peak. The interface is divided into three main sections: ACCOUNT, CONTACT, and OPPORTUNITY. The ACCOUNT section shows "Kiran and Co Marketers" with details like Type: Company, Phone: (347) 810-3329, Website: [redacted], Account Owner: Ogbonna Ngwu, and Account Site: [redacted]. The CONTACT section shows "Kiran Stefcia" with details like Title: Director of Marketing, Account N... Kiran and Co Mar..., Phone: (347) 810-3329, Email: kiranstefcia@marketersc..., and Mobile: [redacted]. The OPPORTUNITY section shows "Kiran and Co Marketers-S..." with details like Account N... Kiran and Co Mar..., Close Date: 31/12/2022, Amount: [redacted], Opportunity O... Ogbonna N..., and a note: "Need for product 18/11/2022, 17:15 by Ogbonna Ngwu". At the bottom, there are buttons for "New Task" and "Go to Leads". The status bar at the bottom right shows the date and time: 4:49 AM 12/3/2022.



# Part B Task 6: Step 4 screenshot

The screenshot shows a Salesforce Lightning interface with a lead conversion message. The browser tab is for "greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Lead/00Q8d000008aMvDEAU/view".

**Your lead has been converted**

**ACCOUNT**

**CONTACT**

**OPPORTUNITY**

**New Task** **Go to Leads**

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

Upcoming & Overdue

follow-up event call

Type here to search

08:00 | 17 Dec

4:52 AM  
12/3/2022

You have reached the end of Part B!

