

SOLUTION ASSIGNMENT 5

Sales and Marketing Applications Assignment

The screenshot shows the Salesforce Opportunities list page. The table displays 31 items, sorted by Opportunity Name. The columns include Opportunity Name, Account Name, Amount, Close Date, Stage, and Opportunity Type. One opportunity, "Closed Won" (ID: 001111111111111111), is highlighted. The Opportunity Type for this row is "Value Proposition". The Stage is "Closed Won". The Opportunity Type for the last row is "Proposal/Price Quote".

	Opportunity Name	Account Name	Amount	Close Date	Stage	Opportunity ...
1	Burlington Textiles Weaving Plant Generator	Burlington Textiles Corp of America	INR 2,35,000.00	26/08/2024	Closed Won	PKuma
2	Dickenson Mobile Generators	Dickenson plc	INR 15,000.00	02/09/2024	Closed Won	PKuma
3	Edge Emergency Generator	Edge Communications	INR 75,000.00	20/10/2024	Closed Won	PKuma
4	Edge Emergency Generator	Edge Communications	INR 35,000.00	26/10/2024	Id. Decision Makers	PKuma
5	Edge Installation	Edge Communications	INR 50,000.00	11/08/2024	Closed Won	PKuma
6	Edge SLA	Edge Communications	INR 60,000.00	07/07/2024	Closed Won	PKuma
7	Express Logistics Portable Truck Generators	Express Logistics and Transport	INR 80,000.00	15/07/2024	Value Proposition	PKuma
8	Express Logistics SLA	Express Logistics and Transport	INR 1,20,000.00	16/07/2024	Value Proposition	PKuma
9	Express Logistics Standby Generator	Express Logistics and Transport	INR 2,20,000.00	17/07/2024	Closed Won	PKuma
10	GenePoint Lab Generators	GenePoint	INR 60,000.00	14/10/2024	Id. Decision Makers	PKuma
11	GenePoint SLA	GenePoint	INR 30,000.00	17/10/2024	Closed Won	PKuma
12	GenePoint Standby Generator	GenePoint	INR 85,000.00	24/08/2024	Proposal/Price Quote	PKuma
13	Grand Unitek Emergency Generators	Grand Unitek & Resources Ltd	INR 2,10,000.00	01/10/2024	Closed Won	PKuma

The screenshot shows the Lead Auto-Response Rules setup page. The table lists two rules: "New Auto Response Rule" and "Response Rule". The "New Auto Response Rule" is inactive, while "Response Rule" is active. Both rules were created by Puja Kumari on 04/11/2024.

Action	Rule Name	Active	Created By	Created On
Rename Del	New Auto Response Rule	<input type="checkbox"/>	Puja Kumari	04/11/2024
Rename Del	Response Rule	<input checked="" type="checkbox"/>	Puja Kumari	04/11/2024

Salesforce Setup - Web-to-Lead Auto-Response Rule

Lead Auto-Response Rules

Rule Detail

Action	Order	Criteria	Sent From (Email)	Template
Edit Del	1	(Lead: Annual Revenue GREATER OR EQUAL "USD 10,000") AND (Lead: City EQUALS Bangalore) AND (Lead: Country EQUALS India) AND (Lead: Company EQUALS Intellipat) AND (Lead: Lead Status EQUALS Open - Not Contacted)	Puja (puja190298@gmail.com)	Marketing_Product Inquiry Response

Rule Entries

New Reorder

Did you find what you're looking for? Try using Global Search.

Help for this Page

21:17 04-11-2024

Salesforce Setup - Web-to-Lead Auto-Response Rule

Lead Auto-Response Rules

Rule Detail

Action	Order	Criteria	Sent From (Email)	Template
Edit Del	1	(Lead: Annual Revenue GREATER OR EQUAL "USD 10,000") AND (Lead: City EQUALS Bangalore) AND (Lead: Country EQUALS India) AND (Lead: Company EQUALS Intellipat) AND (Lead: Lead Status EQUALS Open - Not Contacted)	Puja (puja190298@gmail.com)	Marketing_Product Inquiry Response
Edit Del	2	(Lead: Annual Revenue GREATER OR EQUAL "USD 5,000") AND (Lead: Clean Status EQUALS Different)	Puja (puja190298@gmail.com)	Marketing_Product Inquiry Response

Rule Entries

New Reorder

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21:26 04-11-2024

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

Lead Ms. Bertha Boxer

*Company Farmers Coop. of Florida	Fax (850) 644-4300
Title Director of Vendor Relations	Email bertha@fcf.net
Lead Source Web	Website
Industry Agriculture	* Lead Status Working - Contacted
Annual Revenue 90,07,50,000	Rating Hot
*Lead Currency INR - Indian Rupee	--None-- ✓ Hot Warm Cold
Address Street 322 Main St Building	

Save

To Do List

Type here to search

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

Leads by Status

Your changes are saved.

Name	Email	Rating
Bertha Boxer	bertha@fcf.net	Warm
Jack Rogers	jrogers@btca.com	Hot
Phyllis Cotton	pcotton@abbottins.net	
Jeff Glimpse	jeffg@jackson.com	
Mike Braund	likeb@metro.com	
Patricia Feager	patricia_feager@is.com	
Brenda McClure	brenda@cardinal.net	
Violet Macleod	violetm@emersontransport.com	
Kathy Snyder	ksynder@tnt.net	
Tom James	tom.james@delphi.chemicals.com	
Shelly Brownell	shellyb@westerntelecom.com	
Pamela Owenby	pam_owenby@hendricksotrading.com	
Norm May	norm_may@greenwich.net	
Pat Stumuller	pat@pyramid.net	
Andy Young	a.youno@dickenson.com	

Filters

Filter by Owner
My leads

Add Filter Remove All

To Do List

Type here to search

Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | Lead | Salesforce | Recently Viewed | Leads | Sales | Home | Salesforce

intellipat-3a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Lead/FieldsAndRelationships/00NWU000005QwlP/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Lead

Lead Custom Field Number of Courses

Back to Lead Fields

Custom Field Definition Detail

Field Information

Field Label	Number of Courses	Object Name	Lead
Field Name	Number_of_Courses	Data Type	Number
API Name	Number_of_Courses__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Puja Kumar, 05/11/2024, 3:17 pm	Modified By	Puja Kumar, 05/11/2024, 3:17 pm

General Options

Required

Unique

External ID

AI Prediction

Default Value

Number Options

Type here to search

ARV... ENG 15:17 05-11-2024

Mail - PUJA KUMARI - Out | Start Course | Intellipaat | Lead | Salesforce | Recently Viewed | Leads | S | Lead | Salesforce | Home | Salesforce

intellipat-3a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Lead/FieldsAndRelationships/00NWU000005QwtW/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Lead

Lead Custom Field Lead Priority

Back to Lead Fields

Custom Field Definition Detail

Field Information

Field Label	Lead Priority	Object Name	Lead
Field Name	Lead_Priority		
API Name	Lead_Priority__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Puja Kumar, 05/11/2024, 3:27 pm	Modified By	Puja Kumar, 05/11/2024, 3:27 pm

Formula Options

Data Type Formula

If (Number_of_Courses__c > 3, "High", "Low")

Type here to search

27°C ENG 15:27 05-11-2024

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

Lead Ms. Bertha Boxer

Phone (850) 644-4200
Mobile
Fax (850) 644-4300
Email bertha@fcf.net
Website
Lead Status Working - Contacted
Rating Warm
No. of Employees

Lead Owner Puja Kumari
Name Ms. Bertha Boxer
Company Farmers Coop. of Florida
Title Director of Vendor Relations
Lead Source Web
Industry Agriculture
Annual Revenue INR 90,07,50,000.00
Lead Currency INR - Indian Rupee
Number of Courses 10
Lead Priority High
Address

We found no potential duplicates of this Lead.
Campaign History (0)

Type here to search 27°C 15:40 05-11-2024

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

Lead Ms. Bertha Boxer

Phone (850) 644-4200
Mobile
Fax (850) 644-4300
Email bertha@fcf.net
Website
Lead Status Working - Contacted
Rating Warm
No. of Employees

Lead Owner Puja Kumari
Name Ms. Bertha Boxer
Company Farmers Coop. of Florida
Title Director of Vendor Relations
Lead Source Web
Industry Agriculture
Annual Revenue INR 90,07,50,000.00
Lead Currency INR - Indian Rupee
Number of Courses 2
Lead Priority Low
Address

We found no potential duplicates of this Lead.
Campaign History (0)

Type here to search 27°C 15:41 05-11-2024

Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | Lightning Experience | Salesforce | Bertha Boxer | Lead | Salesforce

Setup

Search Setup

lead

Feature Settings

- Marketing
 - Lead Assignment Rules
 - Lead Auto-Response Rules
 - Lead Processes
 - Lead Settings
- LinkedIn Lead Gen
 - Lead Gen Fields
 - LinkedIn Accounts
- Web-to-Lead
- Sales
 - Lead Intelligence View Setup

Didn't find what you're looking for?
Try using Global Search.

SETUP

New Assignment Rule

Add rule entries that specify the criteria used to route leads. You can reorder rule entries on this page after you create them.

Rule Detail

Rule Name	New Assignment Rule	Active	<input checked="" type="checkbox"/>
Created By	Puja Kumari, 05/11/2024, 3:43 pm	Modified By	Puja Kumari, 05/11/2024, 3:45 pm

Rule Entries

Action	Order	Criteria	Assign To	Email
Edit Del	1	Lead: Product Interest EQUALS GC1000 series	Puja Kumari	<input checked="" type="checkbox"/>

Help for this Page ?

Type here to search

15:45 05-11-2024

Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | Queues | Salesforce | Bertha Boxer | Lead | Salesforce

Setup

Search Setup

queue

Users

- Queues
- Environments
- Jobs
- Apex Flex Queue

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Try using Global Search.

SETUP

Queues

Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member. The records remain in the queue until a user accepts them for processing or they are transferred to another queue. You can specify the set of objects that are supported by each queue, as well as the set of users that are allowed to retrieve records from the queue.

View: All | Edit | Create New View

Action	Label	Queue Name	Queue Email	Supported Objects	Modified By	Last Modified Date
Edit Del	Lead Queue	Lead_Queue		Lead	Kumari_Puja	05/11/2024, 3:47 pm

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | API

Type here to search

15:48 05-11-2024

Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | Lightning Experience | Salesforce | Bertha Boxer | Lead | Salesforce

Setup

Search Setup

Q assignm

Feature Settings

- Marketing **Assignment Rules**
- Salesforce Scheduler **Assignment Policies**
- Service **Case Assignment Rules**
- Topics **Topic Assignment Triggers**

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Lead Assignment Rule

New Assignment Rule

Add rule entries that specify the criteria used to route leads. You can reorder rule entries on this page after you create them.

Action	Order	Criteria	Assign To	Email
Edit Del	1	Lead: Product Interest EQUALS GC1000 series	Puja Kumari	<input checked="" type="checkbox"/>
Edit Del	2	Lead: Annual Revenue EQUALS "USD 1,000"	Lead Queue	<input type="checkbox"/>

Rule Detail

Rule Name	New Assignment Rule	Active	<input checked="" type="checkbox"/>
Created By	Puja Kumari, 05/11/2024, 3:43 pm	Modified By	Puja Kumari, 05/11/2024, 3:49 pm

Help for this Page

15:49 05-11-2024

Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | Nidhi Sinha | Lead | Salesforce | Lightning Experience | Salesforce

Sales

Type here to search

Lead Ms. Nidhi Sinha

+ Follow | New Case | New Note | Submit for Approval

Title Company Phone (2) Email

Intellipat

Open - Not Contacted Working - Contacted Closed - Not Converted Converted

Mark Status as Complete

Activity Details Chatter

Lead Owner	Puja Kumari	Phone
Name	Ms. Nidhi Sinha	Mobile
Company	Intellipat	Fax
Title		Email
Lead Source		Website
Industry		Lead Status
		Open - Not Contacted

Related

We found no potential duplicates of this Lead.

Campaign History (0)

27°C 15:51 05-11-2024

Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | Vikram Gupta | Lead | Salesforce | Lightning Experience | Salesforce

intellipat-3a-dev-ed.lightning.force.com/lightning/r/Lead/00QWU00000AqUD2A1/view

The screenshot shows the Salesforce Lead creation page. At the top, there's a success message: "Lead 'Mr. Vikram Gupta' was created." Below it, the lead's name is displayed: "Mr. Vikram Gupta". The lead details include: Title (Cognizant), Company (Cognizant), Phone (2) (dropdown), and Email (Email field). A progress bar at the top indicates the status: Open - Not Contacted, Working - Contacted, Closed - Not Converted, and Converted. A button to "Mark Status as Complete" is also present. On the left, there's a sidebar with tabs for Activity, Details (selected), and Chatter. The Details tab shows fields for Lead Owner (Puja Kumar), Name (Mr. Vikram Gupta), Company (Cognizant), Title, Lead Source (Web), and Industry. On the right, a "Related" section shows a note: "We found no potential duplicates of this Lead." and a link to "Campaign History (0)". The bottom of the screen shows a Windows taskbar with various icons and system status.

Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | Web-to-Lead | Salesforce | Vikram Gupta | Lead | Salesforce

intellipat-3a-dev-ed.lightning.force.com/lightning/setup/LeadWebtoleads/page?address=%2Fui%2Fcommon%2Fconfig%2Fentity%2FWebToLeadUI%2F%3FretURL%3D%252Flead%2...

The screenshot shows the Salesforce Setup - Web-to-Lead page. The left sidebar has a search bar and navigation links: Feature Settings, Marketing (selected), Service, and Embedded Service. Under Marketing, "Web-to-Lead" is selected. The main content area is titled "Web-to-Lead Setup" and contains a "Create a Web-to-Lead Form" section. It provides sample HTML code for creating a web-to-lead form. The code includes instructions to add a META element to the HEAD and a FORM element to the page. It specifies the action URL as "https://webto.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8&orgId=00DW000000BEdH" and uses POST method. It also includes hidden input fields for "id" and "setURL". A note at the bottom says "These fields are optional defining elements. Please implement." A "Finished" button is at the bottom right. The bottom of the screen shows a Windows taskbar with various icons and system status.

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

Lead Mr. Vikram Gupta

Title Company Phone (2) Email

Open - Not Contacted Working - Contacted Closed - Not Converted Converted

Mark Status as Complete

Activity Details Chatter

Lead Owner: Puja Kumar
Name: Mr. Vikram Gupta
Company: Cognizant
Title:
Lead Source: Web
Industry:

Phone
Mobile
Fax
Email
Website
Lead Status: Open - Not Contacted

Related: We found no potential duplicates of this Lead. Campaign History (0)

Type here to search

Mail - PUJA KUMARI - Outlook Start Course | Intellipaat Web-to-Lead | Salesforce Vikram Gupta | Lead | Salesforce

Setup Home Object Manager

Web-to-Lead

Web-to-Lead Setup

Easily set up a page on your website to capture new leads.

Create a Web-to-Lead Form

Copy and paste the sample HTML below and send it to your webmaster.

```
<!-- This is a sample form for a Web-to-Lead page. You can copy and paste this code into your website's HTML. -->
<label for="first_name">First Name</label><input id="first_name" maxlength="40" name="first_name" size="20" type="text" /><br>
<label for="last_name">Last Name</label><input id="last_name" maxlength="80" name="last_name" size="20" type="text" /><br>
<label for="email">Email</label><input id="email" maxlength="80" name="email" size="20" type="text" /><br>
<label for="company">Company</label><input id="company" maxlength="40" name="company" size="20" type="text" /><br>
<label for="city">City</label><input id="city" maxlength="40" name="city" size="20" type="text" /><br>
<label for="state">State/Province</label><input id="state" maxlength="20" name="state" size="20" type="text" />
```

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Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | Product Information | Salesforce | Web-to-Lead | Salesforce

intellipat-3a-dev-ed.lightning.force.com/lightning/r/Campaign/701WU00000TyTZCYA3/view

Campaign Product Information

Type: Webinar Status: Planned Start Date: End Date:

Related **Details**

Campaign Owner: Puja Kumari Leads in Campaign: 0
Campaign Name: Product Information Converted Leads in Campaign: 0
Active: Contacts in Campaign: 0
Type: Webinar Responses in Campaign: 0
Status: Planned Opportunities in Campaign: 0
Start Date: Won Opportunities in Campaign: 0
End Date: Value Opportunities in Campaign: INR 0.00
Expected Revenue in Campaign: INR 10,000,000.00 Value Won Opportunities in Campaign: INR 0.00

Activity

Filters: All time • All activities • All types

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

No past activity. Past meetings and tasks marked as done show up here.

javascript:void(0);

Type here to search

27°C ENG 16:10 05-11-2024

Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | Product Information | Salesforce | Web-to-Lead | Salesforce

intellipat-3a-dev-ed.lightning.force.com/lightning/r/Campaign/701WU00000TyTZCYA3/view

Campaign Product Information

Opportunities (1)

Product 1

Stage: Value Proposition Amount: INR 10,00,000.00 Close Date: 12/11/2024

Campaign Members (3)

Type	Status	Name	Title
Lead	Responded	Vikram Gupta	
Lead	Sent	Nidhi Sinha	
Lead	Responded	Betty Bair	VP, Administration

No past activity. Past meetings and tasks marked as done show up here.

To Do List

Type here to search

27°C ENG 16:27 05-11-2024

Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | Betty Bair | Lead | Salesforce | Web-to-Lead | Salesforce

intellipat-3a-dev-ed.develop.lightning.force.com/lightning/r/Lead/00QWU000009hlUj2AI/view

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

Lead Ms Betty Bair

Working - Contacted Closed - Not Converted Converted

New Task Log a Call New Event Email

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.

No past activity. Past meetings and tasks marked as done show up here.

Related

We found no potential duplicates of this Lead.

Campaign History (2)

Product Information

GC Product Webinar - Jan 7, 2002

Start Date:	06/04/2024
Type:	Webinar
Status:	Sent

[View All](#)

