

1. [Leads & Opportunities for Lightning Experience](#)



2. [Work Your Opportunities](#)

Work Your Opportunities

Learning Objectives

After completing this unit, you'll be able to:

- Describe how to use opportunities.
- Create an opportunity.
- Add Contact Roles to an opportunity.
- Understand Opportunity Teams.

Opportunities

Opportunities are deals in progress. In Salesforce, you can create opportunities for existing accounts or by converting a qualified lead. Let's explore how you can use opportunities to track your deals, better understand who you're selling to, and focus your team's efforts.

Opportunity Stages

If you've worked in sales, you know that deals usually progress from tentative to firm before they're finalized. As a deal progresses, you grow more confident that you'll make the sale. In Salesforce, an opportunity moves through a series of stages linked to the types of tasks being performed, and how likely it is that the sale will be made.

The stages you usually go through can look like this.

- Prospecting
- Proposal/Price Quote
- Negotiation/Review
- Closed/Won
- Closed/Lost

You had a meeting with Leung and Alan from Get Cloudy Consulting. They're interested in buying sneakers from a couple different product lines. You still have a lot of work to do to close this deal, starting with putting together a package that they'll want to buy.

Your new opportunity for Leung and Alan is in the Prospecting stage. As you work the deal through different stages, the likelihood that Leung and Alan will buy from you increases. After all, if they were no longer interested in your product, they'd probably let you know or stop asking for information. You can estimate the likelihood of a successful sale based on what stage the deal is at. Each stage is associated with a probability that the deal will be completed successfully. Probabilities are used when creating forecasts. (See the Resources below to learn more about forecasting.)

Not every company's process is the same, so the stages your company uses for opportunities may be different from what you'll see in your Trailhead playground. Your company may have set up separate sales processes for each type of sale that reps make. For example, you may have one sales process to handle standard retail orders for large quantities of shoes, and a separate process for small, custom shoe orders.

Let's start by making sure we have a opportunity record where we can track our progress.

1. On the Opportunities tab, click **New**.
2. If your organization has more than one record type for opportunities, select the type that best represents this opportunity.
3. Give the opportunity a name: Get Cloudy - 50 Custom Sneakers
4. Select the account that the opportunity relates to.
5. Select a close date for the opportunity.
6. Select the stage that the opportunity is currently in. For now, let's use **Needs Analysis**. Salesforce adds a probability based on the stage selected. You can change the probability if it isn't accurate for this opportunity.

New Opportunity

Opportunity Information

Opportunity Owner: Linda Rosenberg

Amount:

Private: ☐

* Close Date: 5/1/2019

* Opportunity Name: Get Cloudy - 50 Custom Sneakers

Next Step:

Account Name: Get Cloudy

* Stage: Needs Analysis

Type: New Customer

Probability (%): 20%

Lead Source: --None--

Primary Campaign Source: Search Campaigns...

Additional Information

Order Number:

Main Competitor(s):

Cancel Save & New Save

7. Click **Save**.

Congratulations! You're on your way to closing a great deal. We discuss how to move this deal along the sales process in a bit. First, let's talk about who's involved in this deal.

Contact Roles on Opportunities

Contact roles for opportunities tell you which contacts you're dealing with for the opportunity, and how each is related to the opportunity. You can also link contacts from other accounts to the opportunity using contact roles.

You recently completed a deal with Get Cloudy Canada, and you hear from Leung Chan, a decision maker from Get Cloudy, that she's planning to talk to her Canadian colleague Lars about your product. For this sale, Lars is an Influencer, and you can track that important information by giving Lars a role in the opportunity, even though he's a contact on a different account.

Opportunity
Get Cloudy - 50 StratusX11

Account Name: [Get Cloudy](#) Close Date: 8/31/2018 Amount: \$7,250.00 Opportunity Owner: [Linda Rosenberg](#)

Value Proposition Proposal/Price Q... Negotiation/Revi... Closed Mark Stage as Complete

ACTIVITY CHATTER DETAILS

Log a Call New Task New Event Email

Recap your call... Add

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

Next Steps More Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activities

Preliminary design to come Today You logged a call

Products (1)

Stratus X11

Quantity: 50.00 Sales Price: \$145.00 Date: 7/1/2019 View All

Contact Roles (2)

Leung Chan

Role: Decision Maker Title: Marketing Manager

Alan Johnson

Role: Technical Buyer Title: Sale Manager View All

If you're following along and don't see the Contact Roles related list, scroll down. Related lists may be displayed in a different order depending on how your admin arranged the page layout.

Take a minute to add Lars as a contact for the Get Cloudy Canada account. Then continue on to add his Contact Role for the opportunity you just created.

1. In the Contact Roles related list of an opportunity, select **Manage Contact Roles**.
2. Enter a contact.
3. Choose a role. If you don't select a role or the role is set to None, changes you make to this record aren't saved.

Manage Contact Roles

PRIMARY CONTACT (OPTIONAL)

CONTACT N. *CONTACT ROLE

1	Leung Chan	Decision Maker
2	Alan Johnson	Technical Buyer
3	Lars MacMillan	Influencer

+ Add 1 more row

Cancel Save

4. Optionally, select a primary contact for this opportunity.
5. Click **Save**.

Sell as a Team

It often takes a team to close a deal. In Salesforce, adding an opportunity team helps team members work together and track the opportunity's progress.

Opportunity teams are a bit like account teams. Both allow you to relate particular people at your company to accounts or opportunities. But where account team members can be expected to form a long-term relationship with the customer, an opportunity team is a temporary group composed of people who can help you close the deal. Being a part of the opportunity team gives the team members special visibility into the opportunity, such as updates on Chatter.

If you often work with the same coworkers on your opportunities, you can create a default opportunity team and automatically add that team to all new opportunities. It makes setting up the sales team for your opportunities fast and easy.

Although we don't cover it in this trail, Salesforce offers the opportunity splits feature to incentivize team members to complete the deal. Opportunity splits allow the opportunity owner to share credit for closing a deal. See the Salesforce Help for more information.

Resources

- [Guidelines for Setting Up and Adding a Default Opportunity Team](#) (Salesforce help)
- [Sales Cloud: Opportunity Splits in Lightning Experience](#) (Video)
- [Work Your Opportunities and Manage Your Pipeline](#) (Video)
- [Forecast with Precision](#) (Trailhead unit)

Assessment Complete!

+500 points



Leads & Opportunities for Lightning Experience

100%

Progress: 100%

Retake this Challenge

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