

A. Create an auto-response rule created for the fresh leads coming into the organization

Ans- Setup> Marketing> Lead Auto-Response Rule >New

Web-to-Lead Auto-Response Rule
Auto Response Help for this

Add rule entries that specify the criteria and email template to use to respond to leads. You can reorder rule entries on this page after you create them.

Rule Detail Edit

Rule Name	Auto Response	Active	<input checked="" type="checkbox"/>
Created By	Veena G. 8/15/2023, 7:05 PM	Modified By	Veena G. 8/20/2023, 8:48 PM

Edit

Rule Entries New Reorder

Action	Order	Criteria	Sent From (Email)	Template
Edit Del	1	Lead: Lead Currency NOT EQUAL TO 0	Veena Giri (veebhav2013@gmail.com)	Marketing Product Inquiry Response

B. Apply lead scoring to the prospects (or potential customer) for optimizing the input leads to generate more revenue by following the customer who is likely to get converted into sales.

Ans-

New Import Add to Campaign Change Status Change Owner List View Controls

Search this list...

Lead Status	Owner Alias
Open - Not Contacted	VGiri
Open - Not Contacted	VGiri
Open - Not Contacted	VGiri
Open - Not Contacted	VGiri

Click New>

New Import Add to Campaign Change Status Change Owner

Search this list...

LIST VIEW CONTROLS

- New
- Clone
- Rename
- Sharing Settings
- Edit List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

List View Controls

Select Fields to Display

Available Fields	Visible Fields
Annual Revenue	Name
City	Email
Clean Status	Company
Company D-U-N-S Number	State/Province
Converted	Lead Status
Country	Unread By Owner

Cancel Save

Lead scoring applied to sales lead-

SALESFORCE ADMIN AND APP BUILDER ASSIGNMENT -5

Leads

Lead scoring

New

Import

Add to Campaign

26 items • Sorted by Name • Filtered by My leads • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Name ↑	Email	Company	Annual Revenue	Created Date	Lead Status	
1	<input type="checkbox"/> Andy Young	a_young@dickenson.com	Dickenson plc		7/4/2023, 7:52 AM	Closed - Converted	
2	<input type="checkbox"/> Bertha Boxer	bertha@cof.net	Farmers Coop. of Florida	INR 900,750,000.00	7/4/2023, 7:52 AM	Working - Contacted	
3	<input type="checkbox"/> Betty Bair	bbair@abankingco.com	American Banking Corp.		7/4/2023, 7:52 AM	Working - Contacted	
4	<input type="checkbox"/> Bill Dadio Jr	bill_dadio@zenith.com	Zenith Industrial Partners		7/4/2023, 7:52 AM	Closed - Not Converted	
5	<input type="checkbox"/> Brenda McClure	brenda@cardinal.net	Cardinal Inc.		7/4/2023, 7:52 AM	Working - Contacted	
6	<input type="checkbox"/> Carolyn Crenshaw	carolync@aceis.com	Ace Iron and Steel Inc.		7/4/2023, 7:52 AM	Closed - Not Converted	
7	<input type="checkbox"/> David Monaco	david@blues.com	Blues Entertainment Corp.		7/4/2023, 7:52 AM	Working - Contacted	
8	<input type="checkbox"/> Eugene Luce	eluce@pacificretail.com	Pacific Retail Group		7/4/2023, 7:52 AM	Closed - Not Converted	
9	<input type="checkbox"/> Jack Rogers	jrogers@btca.com	Burlington Textiles Corp of America	INR 350,000,000.00	7/4/2023, 7:52 AM	Closed - Converted	
10	<input type="checkbox"/> Jeff Glimpse	jeffg@jackson.com	Jackson Controls		7/4/2023, 7:52 AM	Open - Not Contacted	
11	<input type="checkbox"/> Kathy Snyder	ksnyder@tnr.net	TNR Corp.		7/4/2023, 7:52 AM	Working - Contacted	
12	<input type="checkbox"/> Kristen Akin	kakin@athenahome.com	Aethna Home Products		7/4/2023, 7:52 AM	Working - Contacted	
13	<input type="checkbox"/> Mike Braund	likeb@metro.com	Metropolitan Health Services		7/4/2023, 7:52 AM	Open - Not Contacted	

C. Create assignment rules for assigning leads of various categories to different sales executives according to the product type.

Ans- Created new lead rule-> Rule entries > New

Lead Assignment Rule

Lead 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 [Edit](#)

Rule Name: Lead assignment rule [Edit](#)

Created By: Veena G. 10/12/2023, 12:06 PM [Edit](#)

Active: ☒ [Edit](#)

Modified By: Veena G. 10/12/2023, 12:07 PM

Rule Entries [New](#)

No rule entries specified.

We recommend you create multiple rule entries under this rule. It is typically not necessary to create more than one rule. However, you may need to create an additional rule if you are importing leads and you choose to route them based on another criteria.

Lead Assignment Rule

Lead 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 [Edit](#)

Rule Name: Lead assignment rule [Edit](#)

Created By: Veena G. 10/12/2023, 12:06 PM [Edit](#)

Active: ☒ [Edit](#)

Modified By: Veena G. 10/12/2023, 12:13 PM

Rule Entries [New](#) [Reorder](#)

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

Queue

Leads module 5

[Edit](#) [Delete](#)

Label: Leads module 5

Queue Email: [Send Email to Members](#)

Created By: Veena G. 10/12/2023, 12:14 PM [Edit](#)

Modified By: Veena G. 10/12/2023, 12:24 PM

All Users in Queue [View Queue Members](#)

Full Name	Reason For Membership
Sam Sales Manager	Queue Member
Suryal Sales Representative	Queue Member
Veepik Jr Sales Representative	Queue Member
Veena G	Queue Member

Lead Assignment Rule

Lead 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 [Edit](#)

Rule Name: Lead assignment rule [Edit](#)

Created By: Veena G. 10/12/2023, 12:06 PM [Edit](#)

Active: ☒ [Edit](#)

Modified By: Veena G. 10/12/2023, 12:17 PM

Rule Entries [New](#) [Reorder](#)

Action	Order	Criteria	Assign To	Email
Edit Del	1	Lead: Product Interest EQUALS GC1000 series	Veena G	<input checked="" type="checkbox"/>
Edit Del	2	Lead: Annual Revenue EQUALS INR 10	Leads module 5	<input type="checkbox"/>

Lead
Prof. Module 5

Title Company Phone (2) ▼ Email
Intellepaat

Open - Not Contacted Working - C

We can't launch this flow because of a variable error. Send this error message to your admin. The value null is sure that all provided values are compatible with the variables' data types.

Activity Details Chatter News

Lead Owner
Veena G

Name
Prof. Module 5

D. Add leads to Campaign in Salesforce through Campaign Member object.

Ans- Create new Campaign in sales>

Campaign
Module 5

Type Status Start Date End Date
Conference In Progress

Related Details

Campaign Hierarchy (0)

Attachments (0) Upload Files

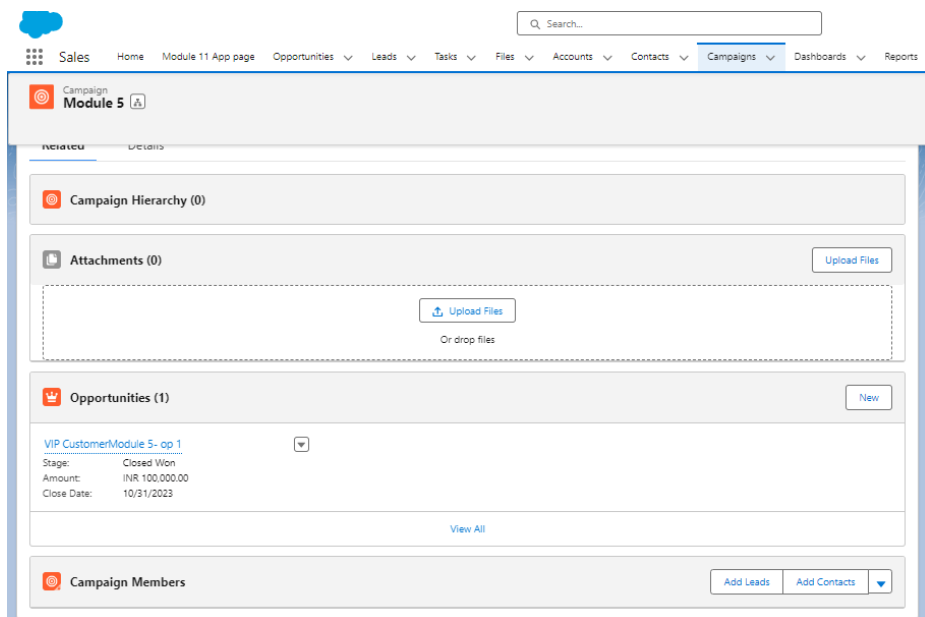
Upload Files
Or drop files

Opportunities (0) New

Campaign Members Add Leads Add Contacts ▼

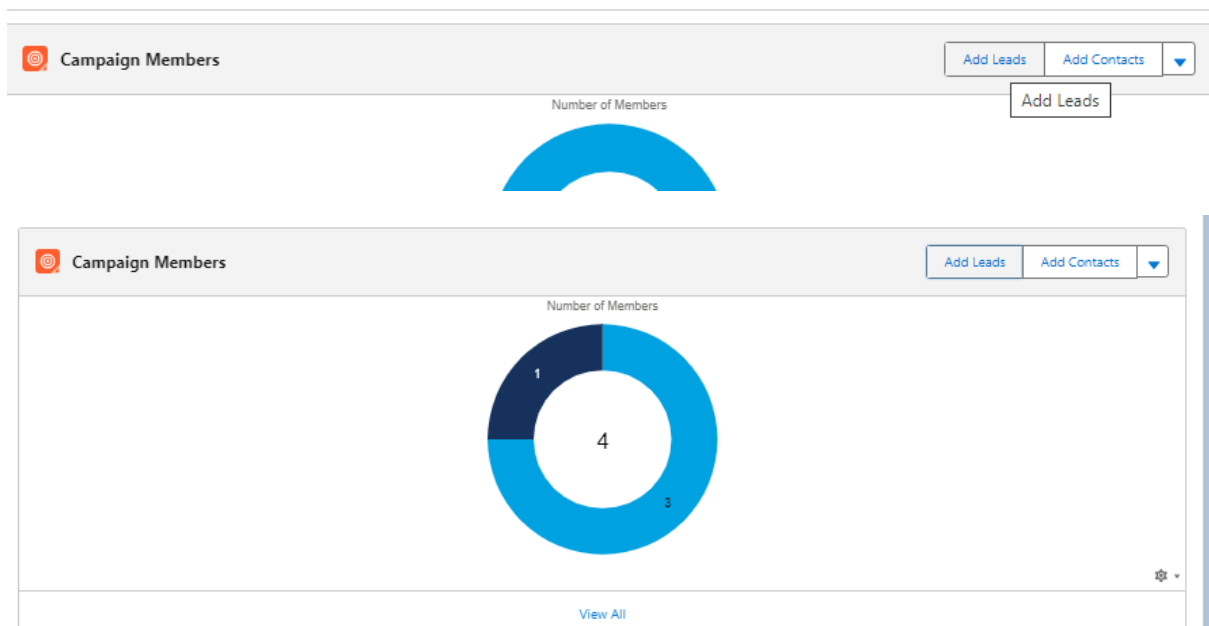
Click >new

SALESFORCE ADMIN AND APP BUILDER ASSIGNMENT -5



The image shows the Salesforce Campaign Module 5 interface. At the top, there is a search bar and a navigation menu with options: Sales, Home, Module 11 App page, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and Reports. The Campaigns menu is selected. Below the navigation bar, the page title is "Campaign Module 5". The main content area is divided into several sections: "Campaign Hierarchy (0)", "Attachments (0)" with an "Upload Files" button, "Opportunities (1)" with a "New" button, and "Campaign Members" with "Add Leads" and "Add Contacts" buttons. The Opportunities section shows a single record for "VIP Customer/Module 5- op 1" with details: Stage: Closed Won, Amount: INR 100,000.00, and Close Date: 10/31/2023. A "View All" link is also present.

Go to campaign > Add leads



The image shows the Salesforce Campaign Members interface. At the top, there is a header bar with the title "Campaign Members" and buttons for "Add Leads", "Add Contacts", and a dropdown menu. Below the header bar, there is a donut chart titled "Number of Members". The chart shows a total of 4 members, with 1 member in a dark blue segment and 3 members in a light blue segment. The number "4" is displayed in the center of the donut chart. Below the chart, there is a "View All" link. The interface also includes a settings gear icon in the bottom right corner.