

Accenture Salesforce Hackathon

*Salesforce Solutions
for a sustainable business*

Day Two - User Management & Sales
Cloud

02nd May 2022

ACCENTURE SALESFORCE ACADEMY

TECH TRAINING LAB – QUICK RECAP

Day 1 - Quick Recap:

01

Trailhead Platform

Trailhead and the Trailblazer Community are part of one unified platform. The Trailblazer Community helps you learn relevant skills, connect with other Trailblazers, and give back. Together, Trailhead and the Trailblazer Community are your one-stop shop to learn, earn, and connect from anywhere



CRM is

CRM allows you to manage relationships with your customers and prospects and track data related to all of your interactions. It also helps teams collaborate, gather insights from social media, track important metrics, and communicate via email, phone, social, and other channels.

02

03

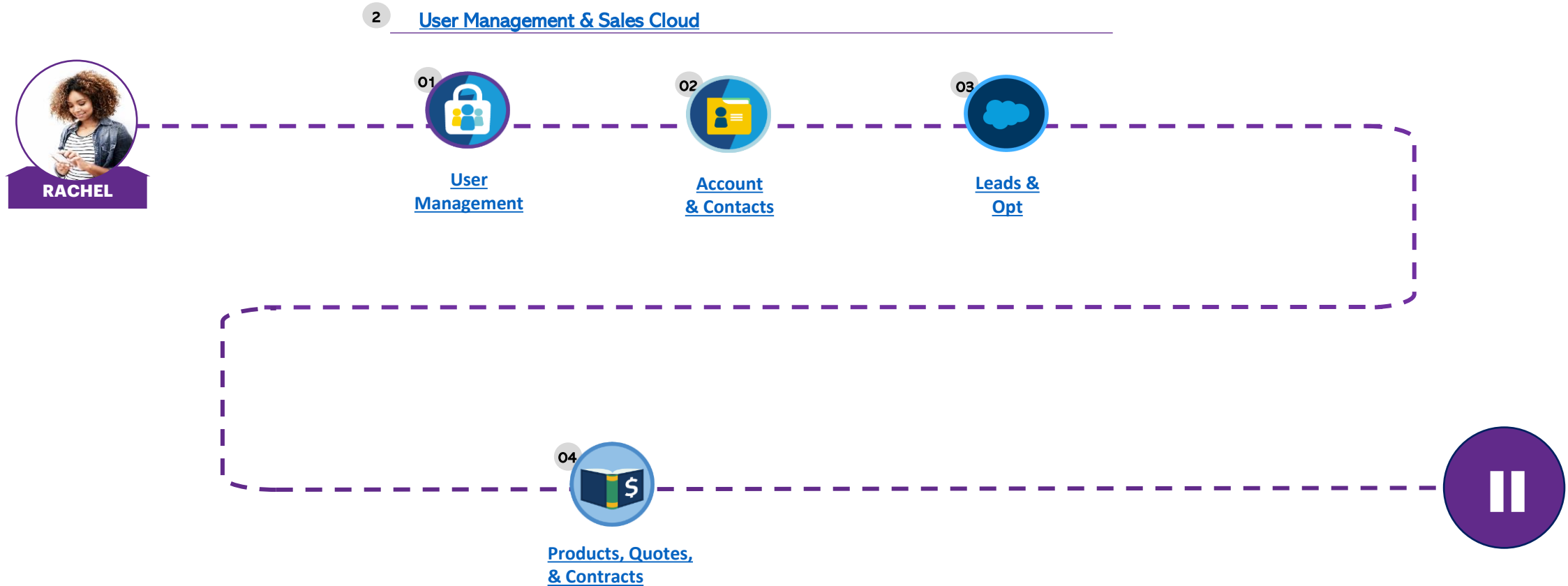
Salesforce is

Salesforce is your customer success platform, has everything you need to run your business from anywhere. Using standard features you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.



ACCENTURE SALESFORCE ACADEMY

TECH TRAINING LAB – HIGH LEVEL AGENDA – DAY 2



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TECH TRAINING LAB – LOW LEVEL AGENDA – DAY 2

Modules	Unit Details	Mins
User Management	Add New Users	20 min
Account&Contacts	Store Information About Your Customers	20 min
	Understand Account and Contact Relationship	10 min
Leads&Opportunity	Create and Convert Leads as Potential Customers	25 min
	Work your Opportunity	15 min
Products, Quotes, & Contracts	Create Price Books to Track Your Products	15 min
	Configure Quotes for Your Customers and Track Contracts	20 min

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LEARNING OBJECTIVE

After completing the pre-requisite trailmix, you'll be able to:

- Describe what is a user
- Explain the relationship between accounts and contact.
- Explain the relationship between leads and opportunities



User Management & Sales Cloud

In detail, you'll be able to:

- Describe a user account and the type of information it contains.
- Describe what is an Account and a Contact
- Create Accounts & Contacts
- Describe what is a lead, create and convert leads
- Describe how to use opportunities
- Create Opportunity
- Set up a price book.

Question:

Who is a **User**?



SALES CLOUD & CUSTOMIZATION

USER MANAGEMENT



A User is anyone who logs in to Salesforce: employee of the company like Sales Rep, Sales Representative

The set of information that should be set in order to create a User:

- **UserName**
- **Email Address**
- **First Name, Last Name**
- **License**
- **Profile**
- **Role**
- **Alias**

It is possible to create a single User or multiple Users (10 at a time). Select **Generate passwords and notify user via email** to email a login name and temporary password to each new user.

It is possible logging in to **Salesforce Mobile App**

Log In

salesforce

Username

super.admin@salesforce.com

Password

.....

Log In

☐ Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

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Question:

What an Account is ?
And what's the difference
between Account & contact?

SALES CLOUD & CUSTOMIZATION

ACCOUNT & CONTACTS FOR LIGHTNING EXPERIENCE



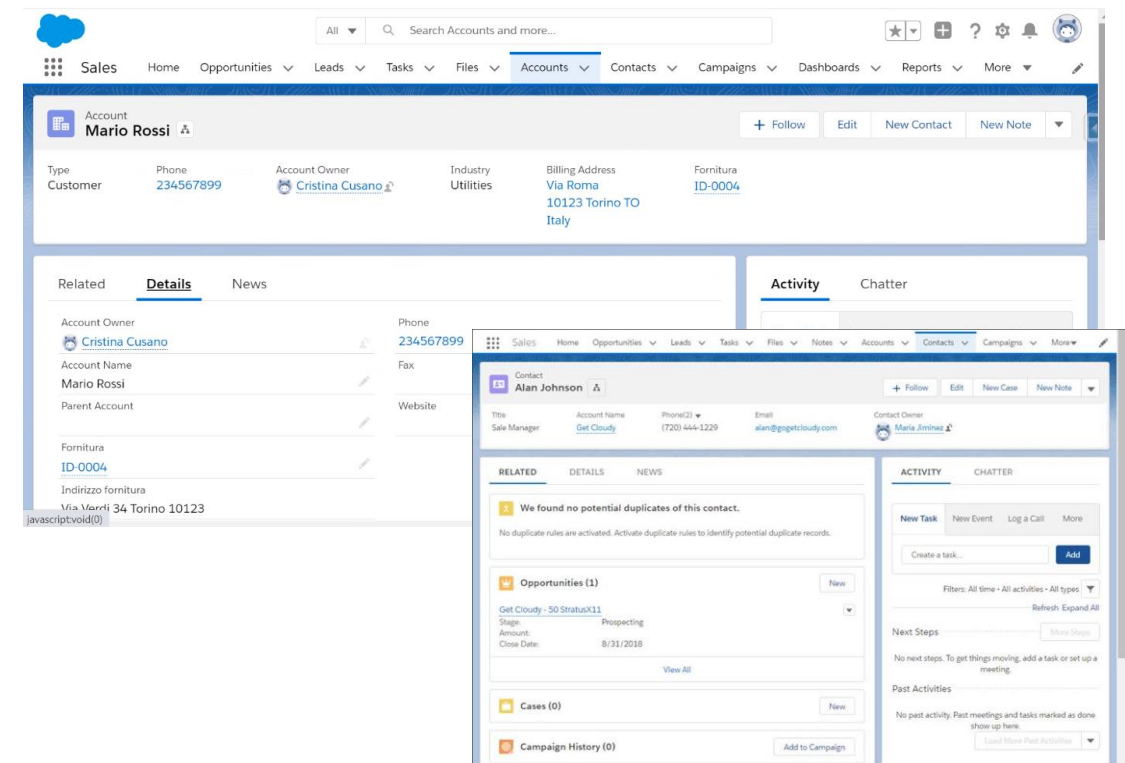
Sales Home Leads ▾ Opportunities ▾ Tasks ▾ Files ▾ Notes ▾ Accounts ▾ Contacts ▾ Campaigns ▾ Dashboards ▾ Reports ▾ Chatter

In Salesforce, you store information about your customers using accounts and contacts. **Accounts** are companies that you're doing business with, and **contacts** are the people who work for them.

Accounts and contacts are related to many other standard objects, which makes them some of the most important objects in Salesforce.

An Account can have **multiple contacts** related that represents all the people of the business company.

- **Track the customer interactions**
- **Account & Contact relationship**
- **Account Team**



SALES CLOUD & CUSTOMIZATION

ACCOUNT & CONTACTS FOR LIGHTNING EXPERIENCE



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

Salesforce allows to track all the **interactions with a Customer** in the Account view or/and in the Contact View in a single Point

- **Task**
- **Log a Call**
- **Activity**

Account: American Banking Corp.

Phone: (610) 265-9100

Account Owner: annalisa esposito

Activity

New Task New Event Log a Call Email

Create a task... Add

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

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

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

New Task Log a Call New Event More

Subject

Due Date

Name

Related To

Assigned To

Elisa Faldella

Search this record...

Subject

Call

Comments

Name

Related To

Mario Rossi

Save

Collaborate here!

Here's where you start talking with your colleagues about this record.

accenture salesforce

SALES CLOUD & CUSTOMIZATION

ACCOUNT & CONTACTS FOR LIGHTNING EXPERIENCE

2



Sales

Home

Leads



Opportunities



Tasks



Files



Notes



Accounts



Contacts



Campaigns



Dashboards



Reports



Chatter

There are different type of relationship between Account and Contacts:

- **Relationships between companies (accounts) and the people who work at them (contacts)**
- **The contact can be linked to multiple Account (Contacts to Multiple Account).** Every contact needs to be directly associated with an account. This is the account that appears in Account Name and is usually the company the contact is most closely associated with. The contact can be added with a relationship to multiple Account.
- **Account Hierarchy.** Can be used in order to create a relationship between Accounts. Example the University of Bologna that has different Campus (Cesena, Forli, ecc). The University of Bologna is an Account with his Address and main contact (i.e. responsabile of student services ecc..) and each Campus is another Account related to the Main Account University of Bologna with their specific contact.

Accounts > Get Cloudy
Related Contacts

3 Items • Sorted by Last Name • Updated a few seconds ago

	CONTACT NAME	ACCOUNT NAME	TITLE	EMAIL	PHONE	ROLES
1	Leung Chan	Get Cloudy	Marketing Manager	leung@gogetcloudy.com	720-444-1837	Decision Maker
2	James Gordan	Consulting Partners Southwest	Regional Sales Manager	jgordan@consultingpartners.org	819-555-9832	Influencer
3	Alan Johnson	Get Cloudy	Sale Manager	alan@gogetcloudy.com	(720) 444-1229	Evaluator

ACCOUNT > GET CLOUDY
Account Hierarchy

ACCOUNT NAME	ACCOUNT SITE	BILLING STATE/PROVL	PHONE	TYPE	ACCOUNT OWNER ALI...
Get Cloudy CURRENT	Headquarters	NV	819-555-0001	Customer - Direct	mjim
Get Cloud East	Branch	MA	617-555-0102	Customer - Direct	mjim
Get Cloudy Canada	Branch	ON	437-555-9390	Customer - Direct	mjim
Get Cloudy West	Branch	WA	425-555-1212	Customer - Direct	mjim

SALES CLOUD & CUSTOMIZATION

LEADS & OPPORTUNITIES FOR LIGHTNING EXP.



Sales

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Leads



Opportunities



Tasks



Files



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Chatter

Leads are people and companies that are identified as potential customers.

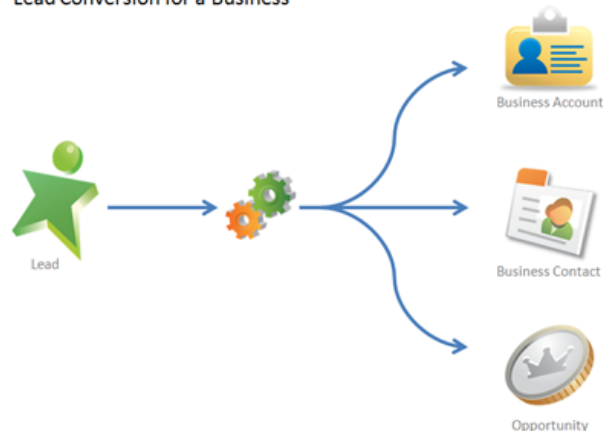
After the lead has been worked can be qualified into **Account, Contact and Opportunity** or can be converted in **Person Account and Opportunity**

Exact criteria for qualifying and converting leads are part of the company's business process (it is possible to convert a lead immediately or after several activities like calls, appointment ecc)

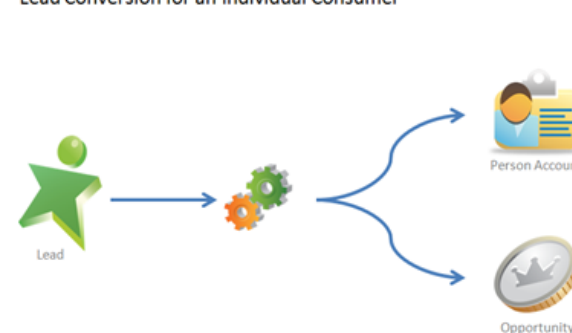
When a lead is converted, Salesforce uses the information stored in the lead record to create a business account, a contact, and an opportunity.

An **Opportunity** is a deal in progress. An Opportunity can be created converting a lead or creating a new Opportunity for an existing Account

Lead Conversion for a Business



Lead Conversion for an Individual Consumer



SALES CLOUD & CUSTOMIZATION

LEADS & OPPORTUNITIES FOR LIGHTNING EXP.



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Chatter

In Salesforce, an opportunity moves through a series of stages, **Opportunity Stages**, linked to the types of tasks being performed, and the likelihood of completing the sale.

For each Stage it is possible to associate a **Win Probability (%)**

In general the Stage, even if can be customized depending on the specific sales process, can look like this:

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

Contact roles on opportunities allows to track the contacts related to the specific deal and also to specify how each contact is related to the opportunity.

Can be added as Opportunity contact roles also contacts from other accounts to the opportunity.

The screenshot shows the Salesforce interface for an Opportunity record titled "Get Cloudy - 50 StratusX11". The record is in the "Value Proposition" stage, with a progress bar showing stages: Value Proposition, Proposal/Price Quote, Negotiation/Review, and Closed. The "Activity" tab is selected, showing a "Log a Call" button and a text input field with the placeholder "Recap your call...". Below the activity section, there is a "Upcoming & Overdue" section with the message "No next steps. To get things moving, add a task or set up a meeting." and a "March 2020" calendar view showing a "Preliminary design to c..." activity. On the right, the "Related" section shows "Products (1)" with details for "Stratus X11" (Quantity: 1.00, Sales Price: \$145.00, Date: 7/1/2019) and "Contact Roles (2)" with details for "Leung Chan" (Role: Decision Maker, Title: Marketing Manager) and "Alan Johnson" (Role: Technical Buyer, Title: Sales Manager).

SALES CLOUD & CUSTOMIZATION

LEADS & OPPORTUNITIES FOR LIGHTNING EXP.



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Path shows where the record is in the sales process. It's a quick indicator that helps visualize where the process is and where it is going.

The Path can be used to update the record's status by clicking **Mark Status as Complete** to move the record to the next step on the path

Key Fields highlight the information used the most in a specific stage.

The Kanban view is a visual summary of the records in a list view. It gives a big picture view of all work and allows to sort, summarize, filter, and move the opportunities along the pipeline. It is possible to choose the **summarize** and **grouping** condition: as summarize can be used any Currency, Number fields on the Opportunity (Example Amount), as grouping can be selected any picklist field in the Opportunity or the Stage or the Opportunity owner

LEAD
Mr. Pete Bennett

Convert Edit Delete

Title: Owner, Company: Bennett Compan..., Phone: 415-555-1212, Email:

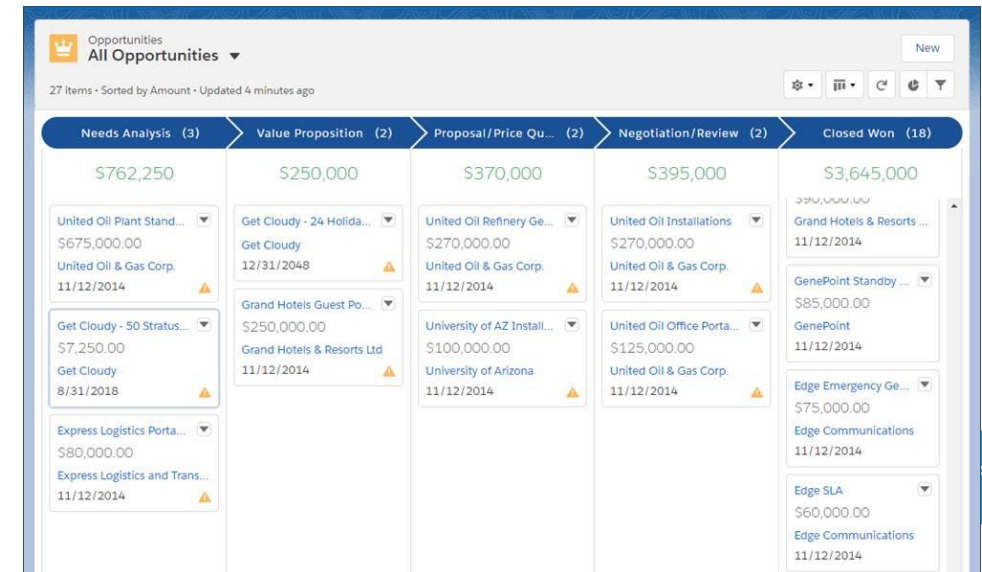
Path: Open (selected) → Contacted → Converted. Button: Mark Status as Complete

KEY FIELDS: Edit

Name: Mr. Pete Bennett
Company: Bennett Company Jewelers
Phone: 415-555-1212
Website: <http://www.bennettcojewelers.com>
Annual Revenue: USD 350,000.00

GUIDANCE FOR SUCCESS

- Respond to lead within 5 minutes.
- Visit your lead's website to learn about their business.



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SALES CLOUD & CUSTOMIZATION

PRODUCTS, QUOTE & CONTRACT



A Product contain the information such as Name, Description, Code ecc.

Where is the information of the Price of a Product stored?

Because each product can have multiple price in different Pricebook and each Pricebook can contain more than one product, the relationship between Product a Pricebook is a many to many relationship.

PricebookEntry is the junction object between products and pricebook and contains:

- The information of price
- A lookup to the Product
- A lookup to the Pricebook

All products must be added to the Standard PriceBook before being added to custom Pricebook. The Standard Pricebook is like a master book of all products.

Opportunity and Product

For an Opportunity you can choose a PriceBook and then add products

PRICE BOOK NAME DESCRIPTION LAST MODIFIED DATE ACTIVE

1	Southeast			
2	Standard			

Search Salesforce

Create Price Book

Price Book Name: West Coast Manufacturing

Description: Discounted prices for the West Coast

Active: ☒

Is Standard Price Book: ☐

Created By: Last Modified By:

Cancel Save & New Save

Add Products

Price Book: West Coast Manufacturing

Search Products...

Show Selected (1)

Product Name	Product Code	List Price	Product Description	Product Family
<input checked="" type="checkbox"/> GenWatt Gasoline 2000kW	GC5060	\$150,000.00		
<input type="checkbox"/> GenWatt Gasoline 750kW	GC5040	\$75,000.00		
<input type="checkbox"/> GenWatt Propane 500kW	GC3040	\$50,000.00		
<input type="checkbox"/> Installation: Industrial - High	IN7080	\$85,000.00		
<input type="checkbox"/> Installation: Industrial - Low	IN7040	\$20,000.00		
<input type="checkbox"/> Installation: Industrial - Medium	IN7060	\$50,000.00		
<input type="checkbox"/> SLA: Bronze	SL9020	\$10,000.00		
<input type="checkbox"/> SLA: Gold	SL9060	\$30,000.00		
<input type="checkbox"/> SLA: Platinum	SL9080	\$40,000.00		
<input type="checkbox"/> SLA: Silver	SL9040	\$20,000.00		

Cancel Next

SALES CLOUD & CUSTOMIZATION

PRODUCTS, QUOTE & CONTRACT



The Sales cloud offer the **Quote object**.

A Quote shows a combination of products, discounts, and quantities. You can create multiple Quotes in order to allow the customer to compare the prices.

From the Opportunity you can create a Quote. All the **Opportunity Products** will be syncs as **Quote Line**

It is possible to **generate PDF files** for the quotes sent to the customers. Salesforce includes a standard template, but you can create customized template

1,000 kW Diesel Generator

Follow Edit New Case New Note

all... Need... Value... Id. De... Perce... **Propo...** Nego... Closed Mark as Current Stage

ACTIVITY CHATTER DETAILS

Log a Call New Task New Event Email

Subject Call Comments Save

Filter Timeline

Next Steps More Steps

Verify specs for 1,000 kW diesel generator Oct 31

Products (1)

GenWatt Diesel 1000kW

Quantity: 1.00

Sales Price: \$98,500.00

Date: 10/24/2016

View All

Quotes (0) New Quote

Notes & Attachments (0)

QUOTE Dickenson PLC Diesel Generator

Edit Delete Create PDF

Quote Number 00000002 Expiration Date 11/4/2016 Syncing Opportunity ... 1,000 kW Di... Account Name Express Logi...

RELATED DETAILS ACTIVITY

Quote Line Items (1)

GenWatt Diesel 1000kW

List Price: 98500

Sales Price: \$98,500.00

Quantity: 1.00

View All

Choose Template...

Choose template

No Sales Tax

No Sales Tax

Standard Template

Sales in Europe

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HANDS – ON CHALLENGE

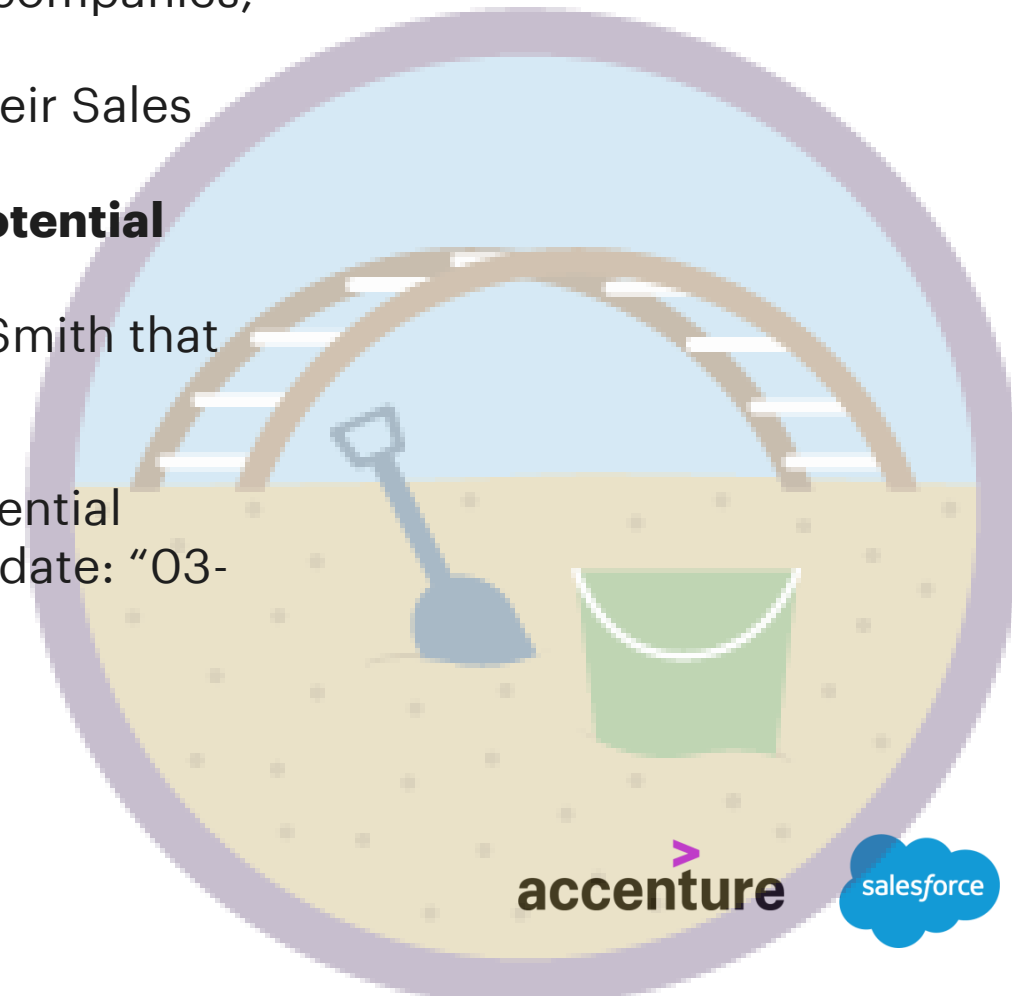
Your Customer is a firm that sells mobile phones to big companies, the MOBILE SRL.

The MOBILE SRL asks you to meet the requirement of their Sales Agents.

A Sales Agent ask you to track for him in Salesforce **a potential Customer.**

More in depth, the Sales Agent has spoken with Cristal Smith that represent the Company: Cloudy SPA.

The Sale Agent ask you to track a task related to the potential customer: "Call Cristal Smith for Cloudy SPA" with due date: "03-May-2022".



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TECH TRAINING LAB – QUIZ TIME



And now is your time!

Test your knowledge, instructions below

<https://traininggarage-developer-edition.eu40.force.com/QuizTime/s/>

Insert your Name, Surname and the code: TV_01

Thank You

