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

02

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.

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.

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ACCENTURE SALESFORCE ACADEMY
TECH TRAINING LAB – HIGH LEVEL AGENDA – DAY 2

2 User Management & Sales Cloud

RACHEL

01 User Management

02 Account & Contacts

03 Leads & Opt

04 Products, Quotes, & Contracts

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ACCENTURE SALESFORCE ACADEMY
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

TRAILHEAD

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.

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TECH TRAINING LAB

Question:

Who is a **User**?

SALES CLOUD & CUSTOMIZATION
USER MANAGEMENT

2

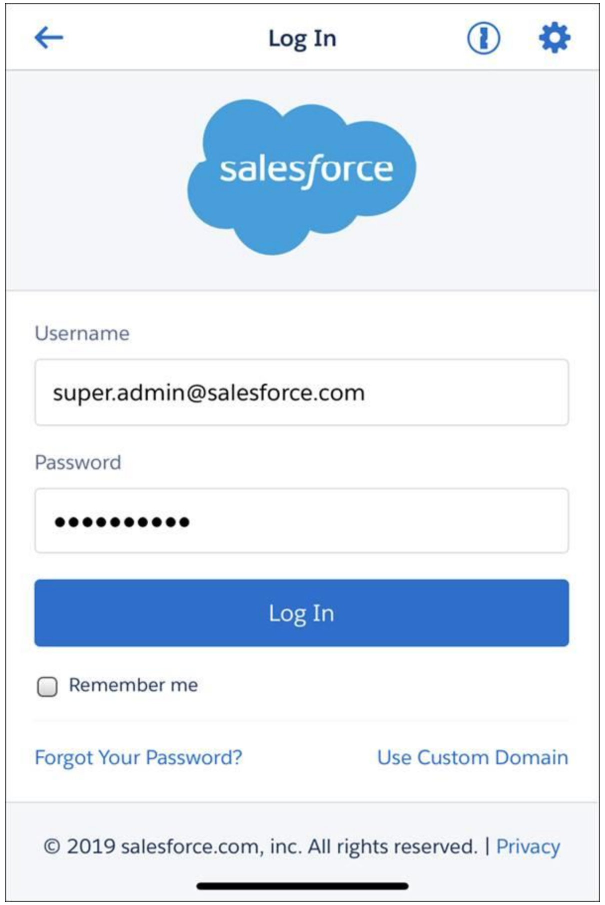
A User is anyone who logs in to Salesforce: employee of the company like Sales Rep, Sales Representative

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**



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Question:

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

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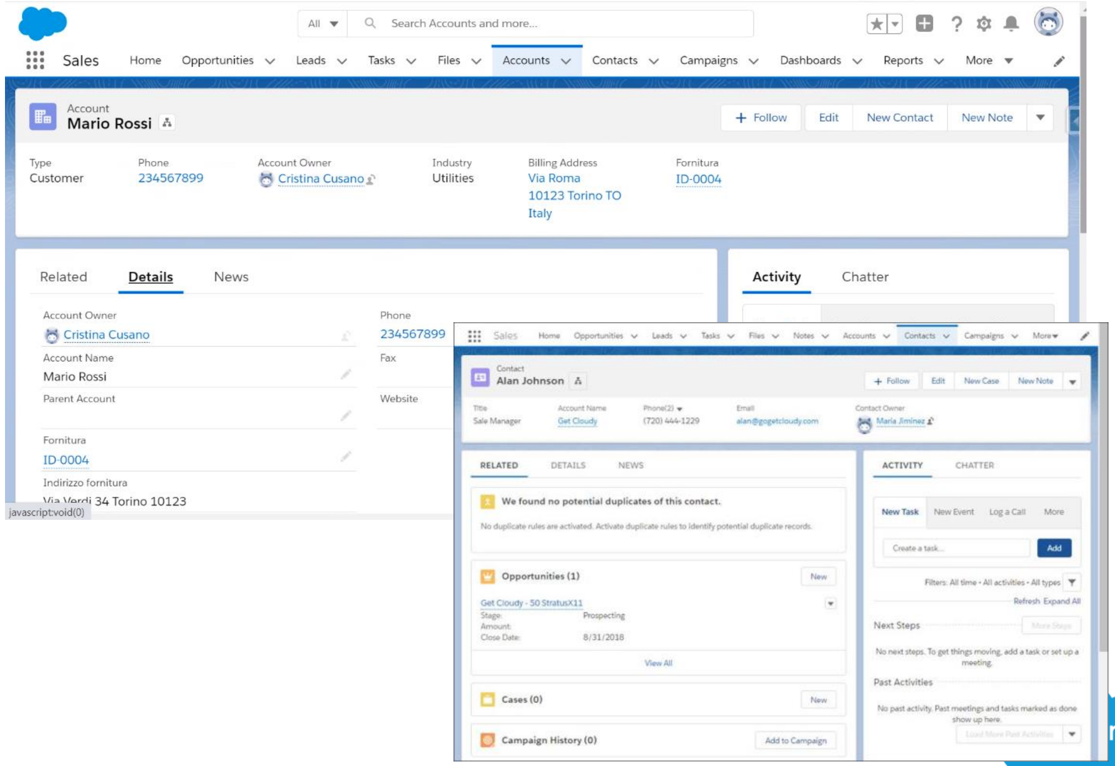
SALES CLOUD & CUSTOMIZATION
ACCOUNT & CONTACTS FOR LIGHTNING EXPERIENCE

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.

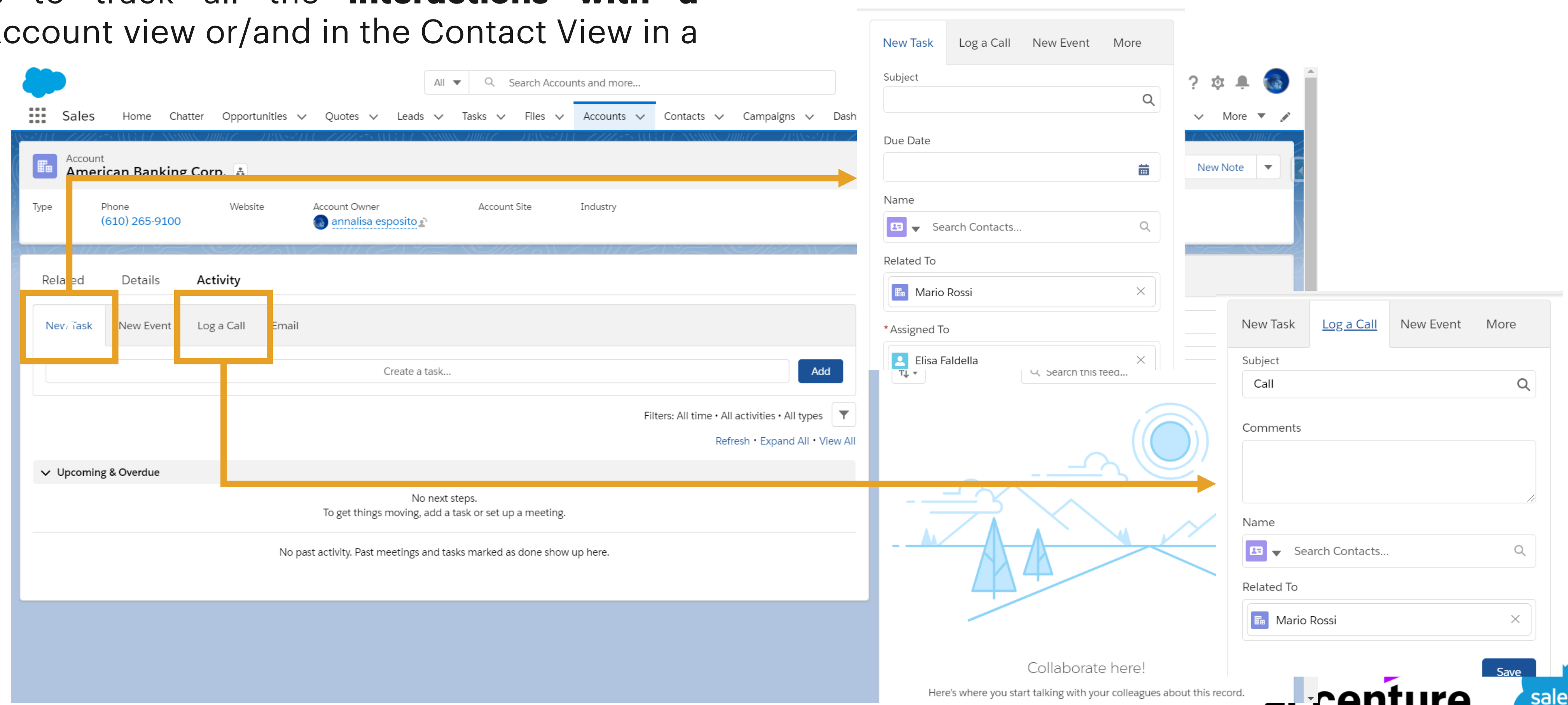
- **Track the customer interactions**
- **Account & Contact relationship**
- **Account Team**



SALES CLOUD & CUSTOMIZATION
ACCOUNT & CONTACTS FOR LIGHTNING EXPERIENCE

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**



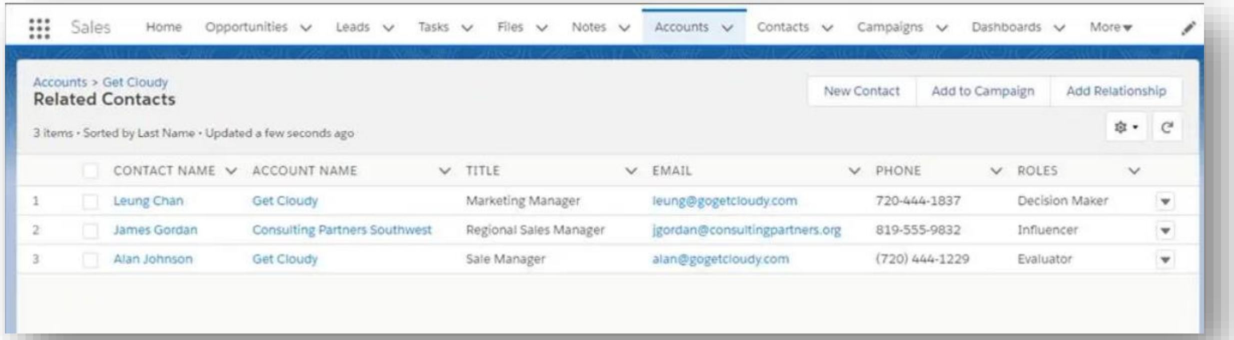
SALES CLOUD & CUSTOMIZATION
ACCOUNT & CONTACTS FOR LIGHTNING EXPERIENCE

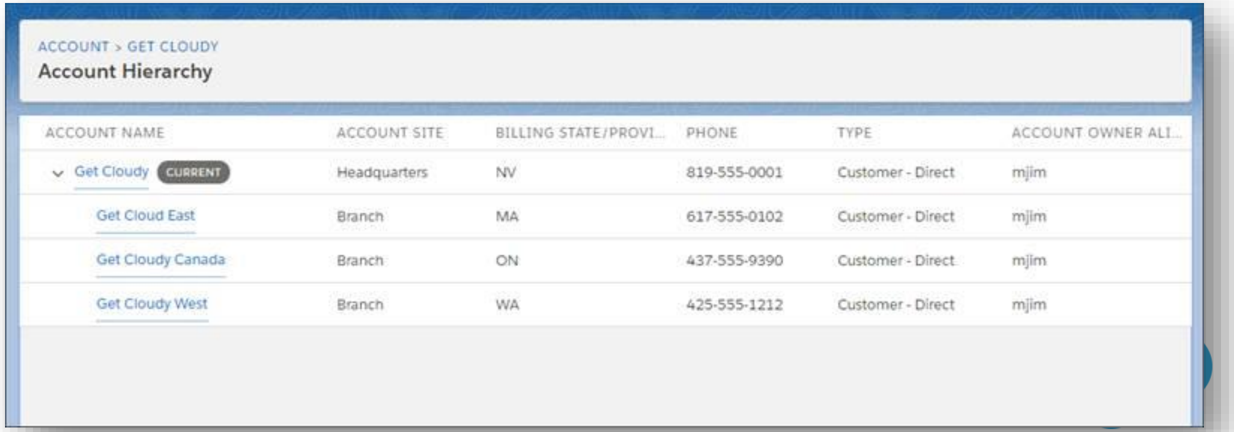
There are different type of relationship between Account and Contacts:

- **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.



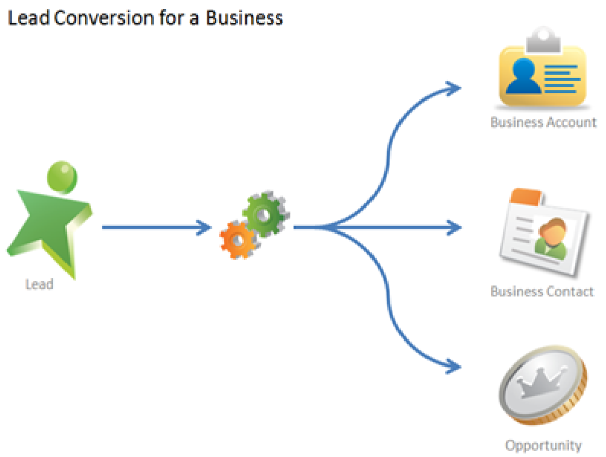


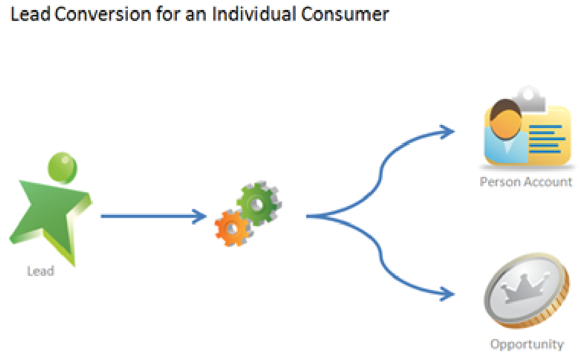
SALES CLOUD & CUSTOMIZATION
LEADS & OPPORTUNITIES FOR LIGHTNING EXP.

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 of 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





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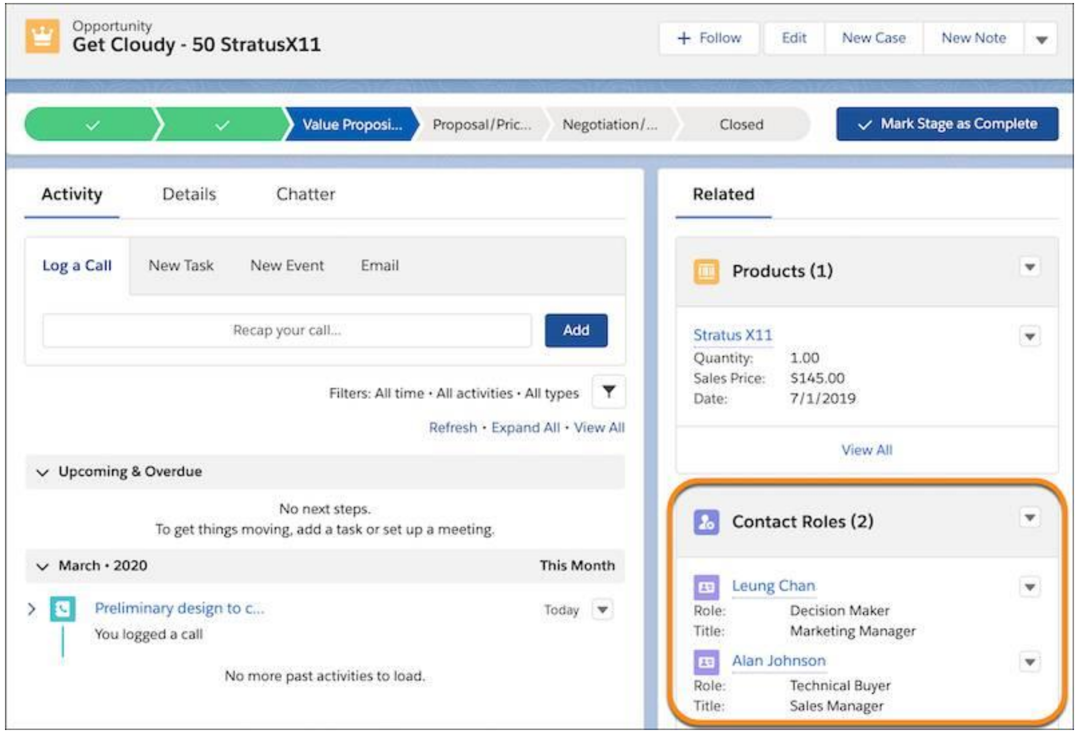
SALES CLOUD & CUSTOMIZATION
LEADS & OPPORTUNITIES FOR LIGHTNING EXP.

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 looks 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.

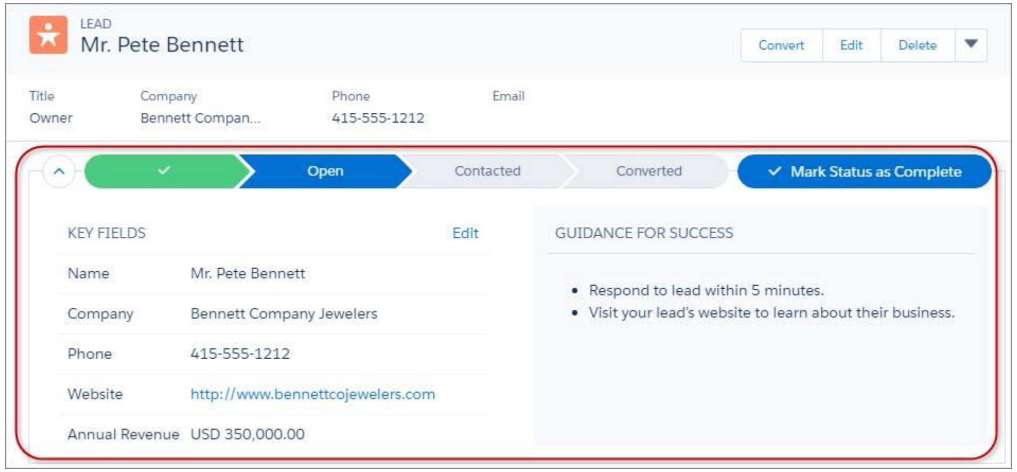
SALES CLOUD & CUSTOMIZATION
LEADS & OPPORTUNITIES FOR LIGHTNING EXP.

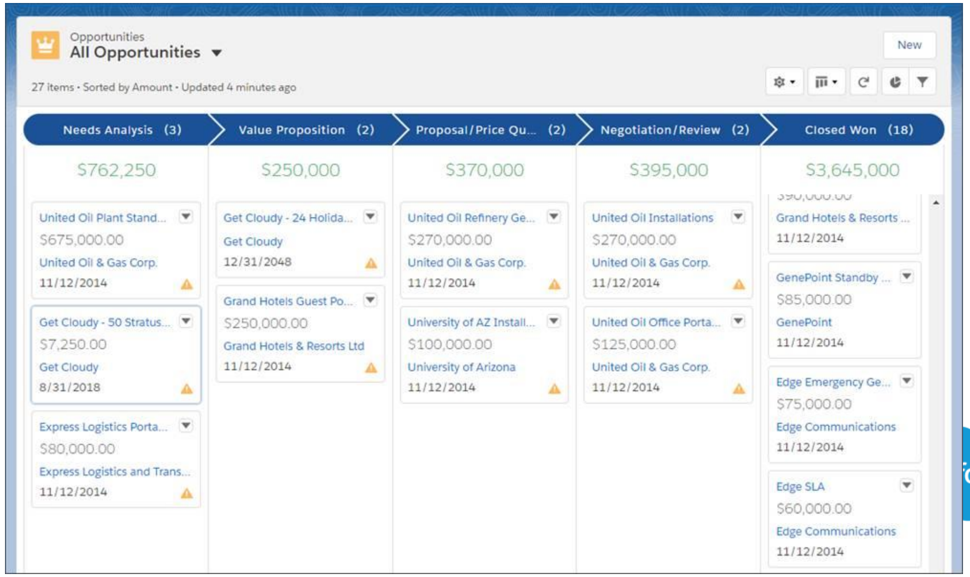
Path shows where the record is in the sales process. It’s a quick indicator that helps visualize where the process is and where it is going.

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





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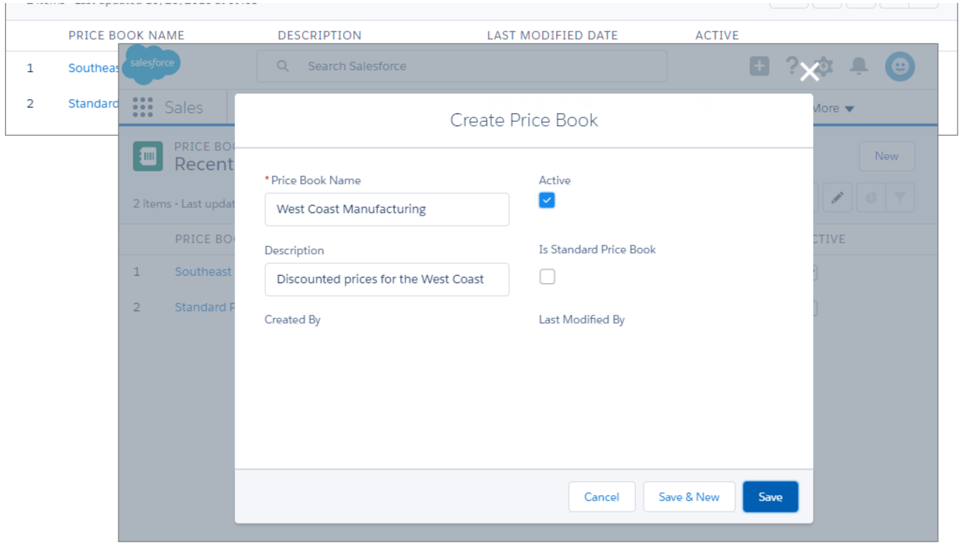
SALES CLOUD & CUSTOMIZATION
PRODUCTS, QUOTE & CONTRACT

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

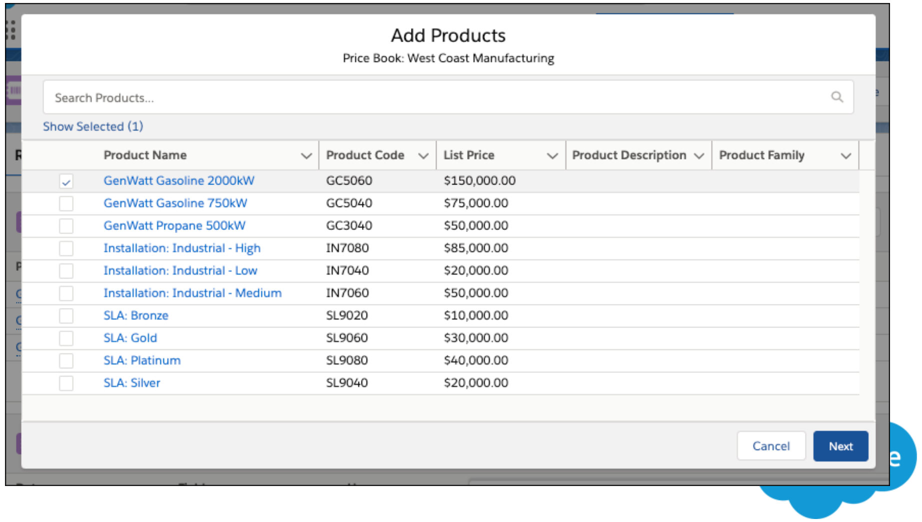


Where is the information of the Price of a Product stored?

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

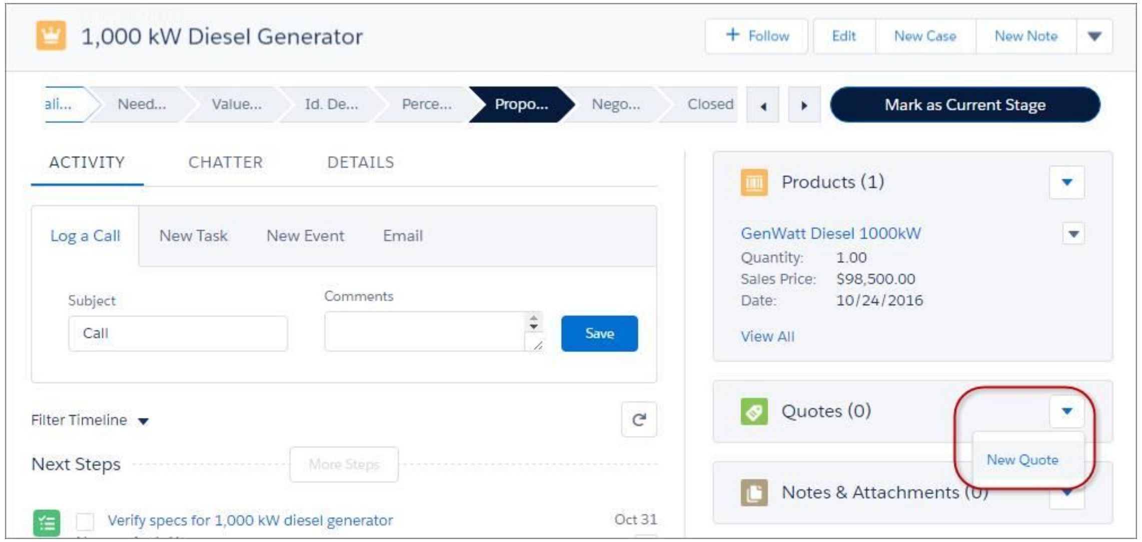
For an Opportunity you can choose a PriceBook and then add products

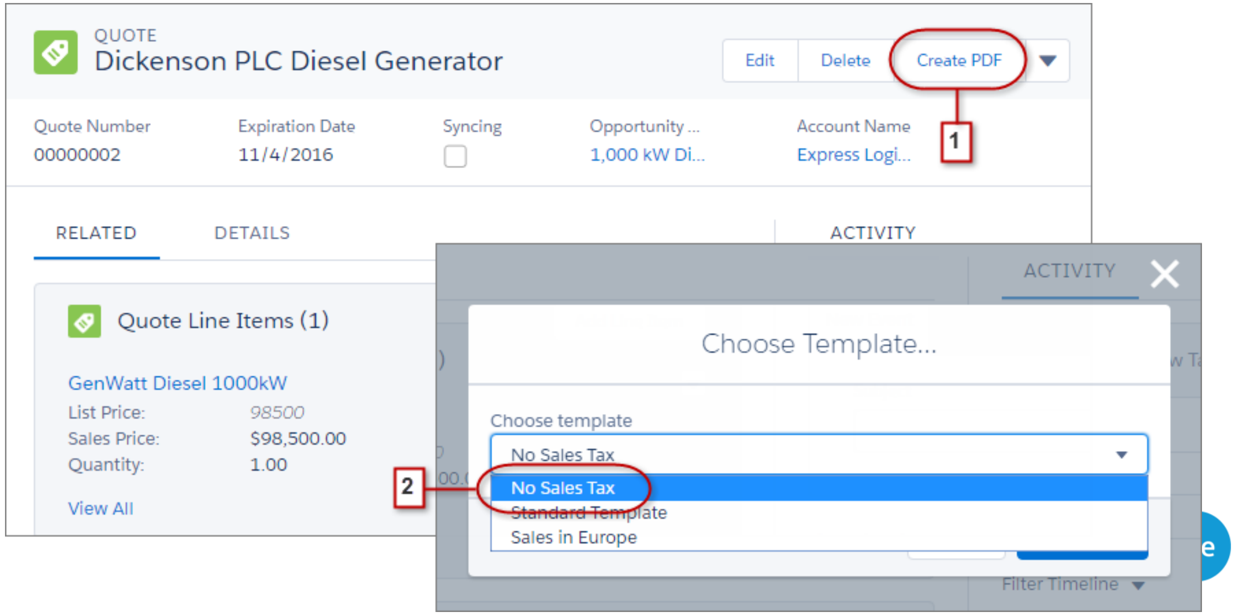
SALES CLOUD & CUSTOMIZATION
PRODUCTS, QUOTE & CONTRACT

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





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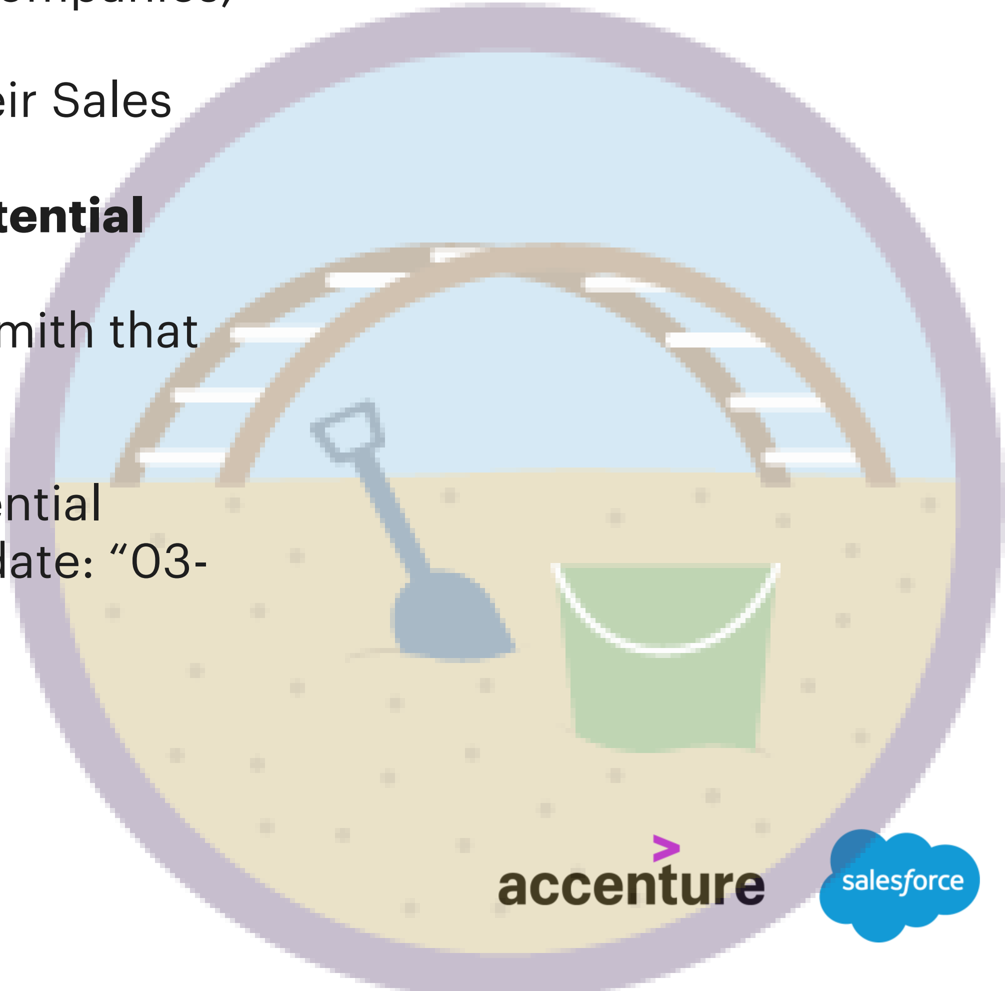
HANDS – ON CHALLANGE

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 Cristial Smith for Cloudy SPA” with due date: “03-May-2022”.



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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