salesforce

Training 101

(NOTE: Salesforce screen shots have been blurred due to proprietary information)

Leads, Accounts and Opportunities

In everyday business, people often use the terms "lead" and "contact" interchangeably to refer to a prospect—a person who is interested in your product or service. In Salesforce CRM, however, the terms "lead" and "contact" refer to specific data objects, each with its own fields.

When a lead is created in Salesforce CRM, information about the interested person is stored in the lead object. The sales teams can then follow up on and qualify that lead—that is, determine whether it has a realistic chance of closing. If the lead qualifies, the team "converts" it in the application. At that point, Salesforce CRM automatically transfers the information in the lead object into the contact object.

In addition to moving lead information to the contact object, the app creates two additional objects: an account object and an opportunity object.

The account object holds all the information about your customer—in essence, it becomes the central object. The opportunity object becomes part of the sales pipeline, which makes it possible to track the deal as it moves through the pipeline. Reps can attach additional contacts and opportunities to accounts or additional contacts to opportunities.

For example, ABC Company (the account) may be associated with several employees at ABC Company (contacts) as well deals in progress for different products (opportunities).

The graphic below shows how these objects relate to each other.

Contact: *Contacts* are the individuals associated with your accounts.

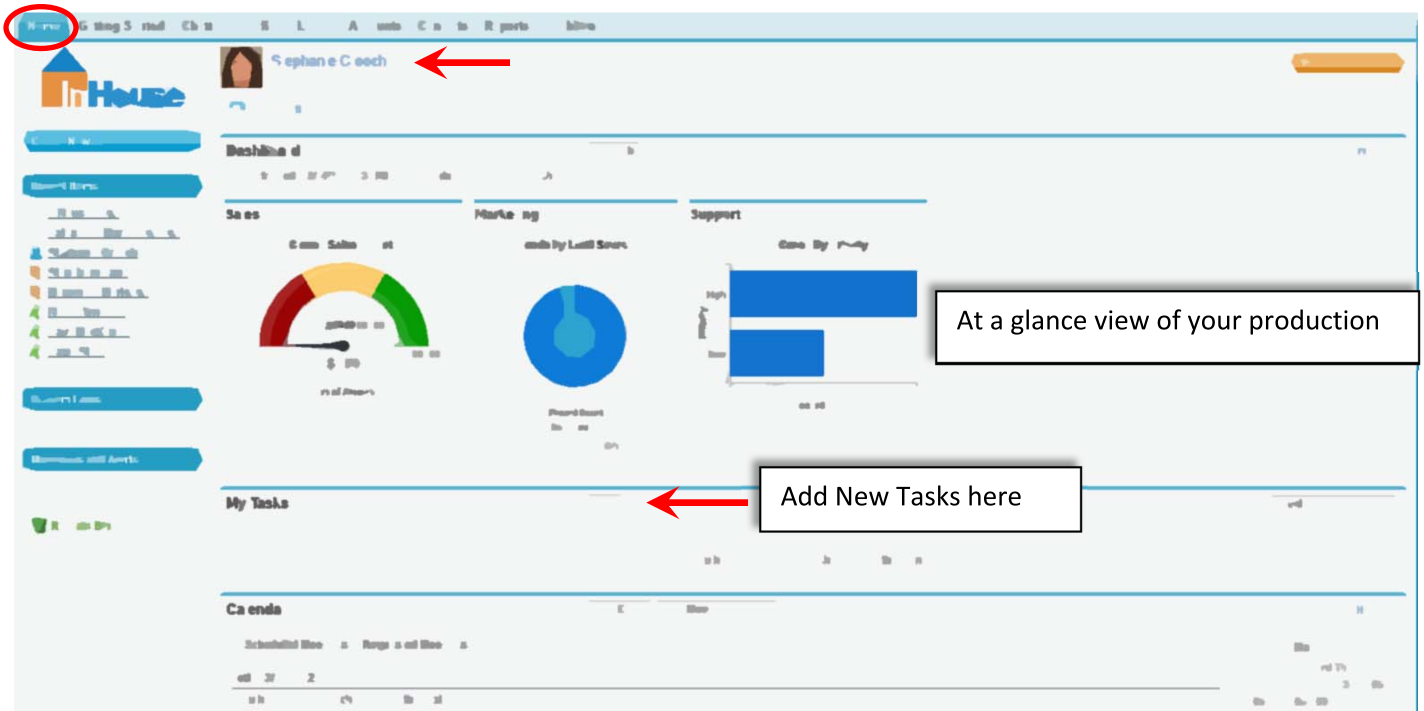
Contact Role: The role that a contact plays in a specific account, contract, or opportunity, such as "Decision Maker" or "Evaluator." You can mark one contact as the "primary" contact for the account, contract, or opportunity. A contact may have different roles in various accounts, contract, or opportunities.

Lead: A *lead* is a sales prospect who has expressed interest in your product or company. A lead is any person, organization, or company interested in your products or services. Leads represent unqualified prospects or potential sales deals. Lead information includes: Name, email, phone and company.

Account: An *account* is an organization, company, or consumer that you want to track—for example, a customer, partner, or competitor.

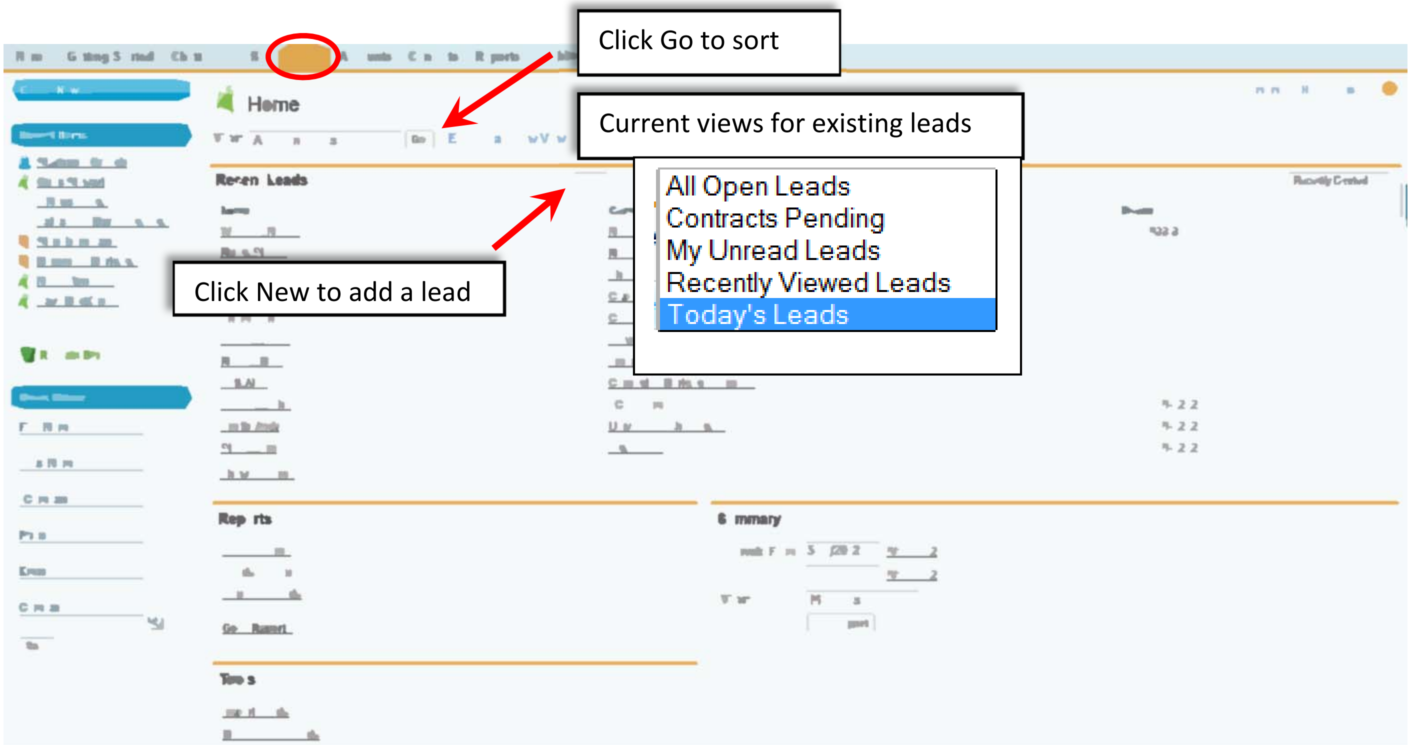
Opportunities: Opportunities track your sales and pending deals. Opportunities make up your sales pipeline, are always associated with an account and can be associated with a contact.

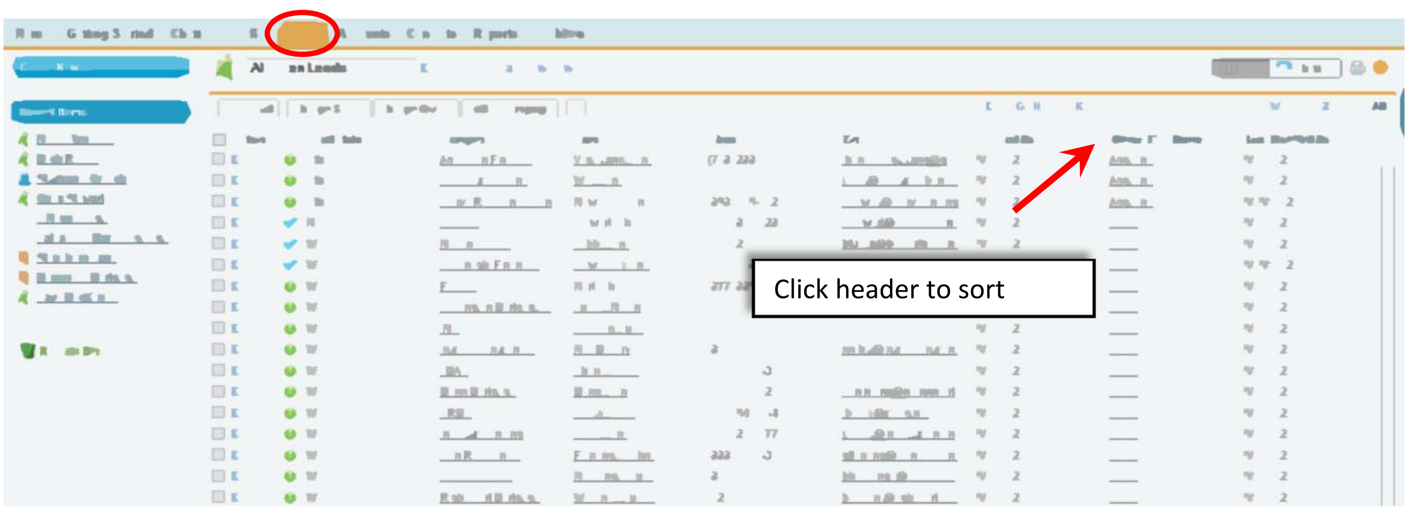
Home Tab

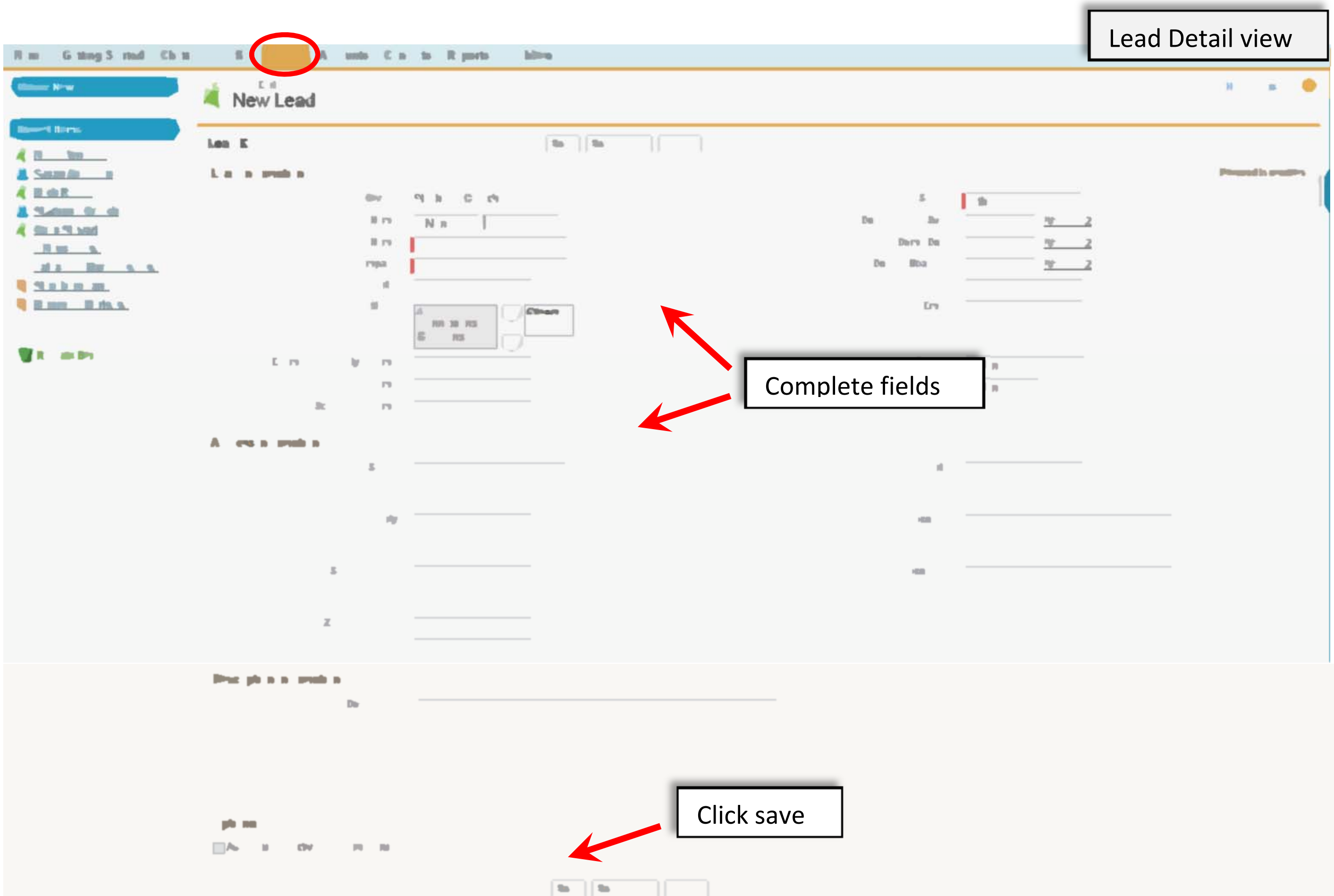

At a glance view of your production
Add New Tasks here
Support
My Tasks

Profile Tab

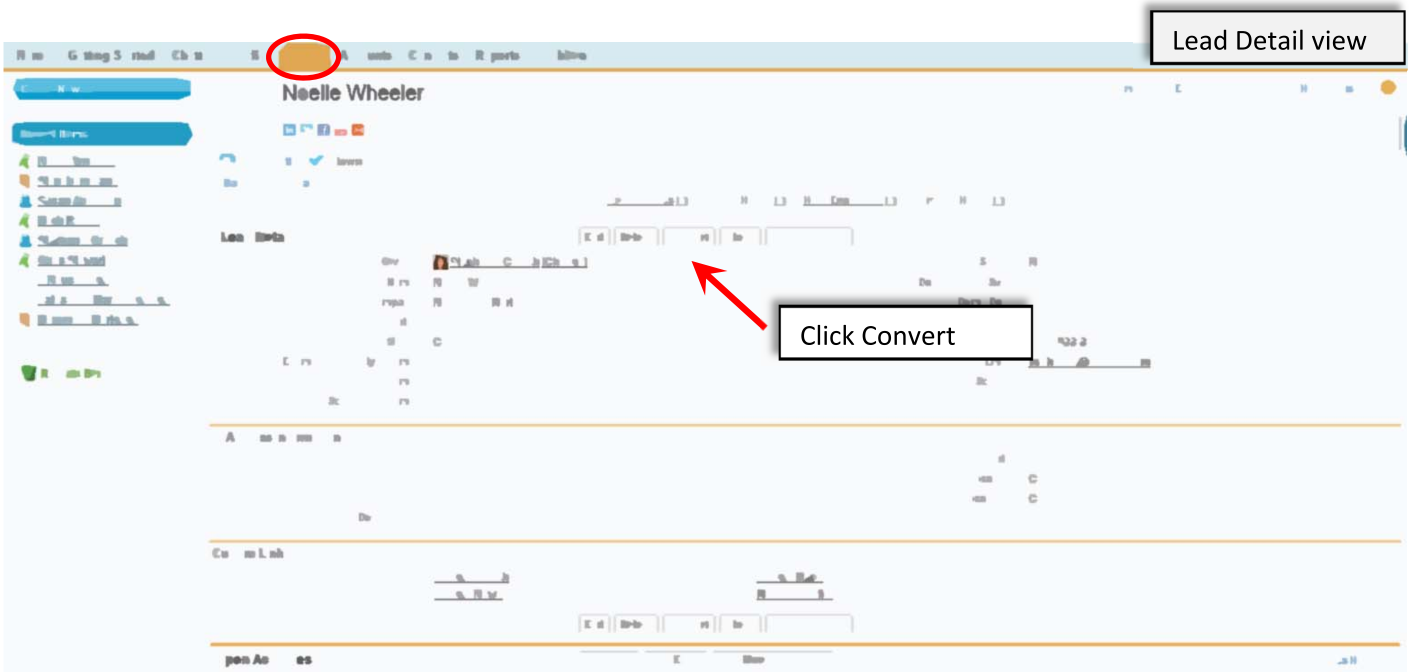
Leads Tab

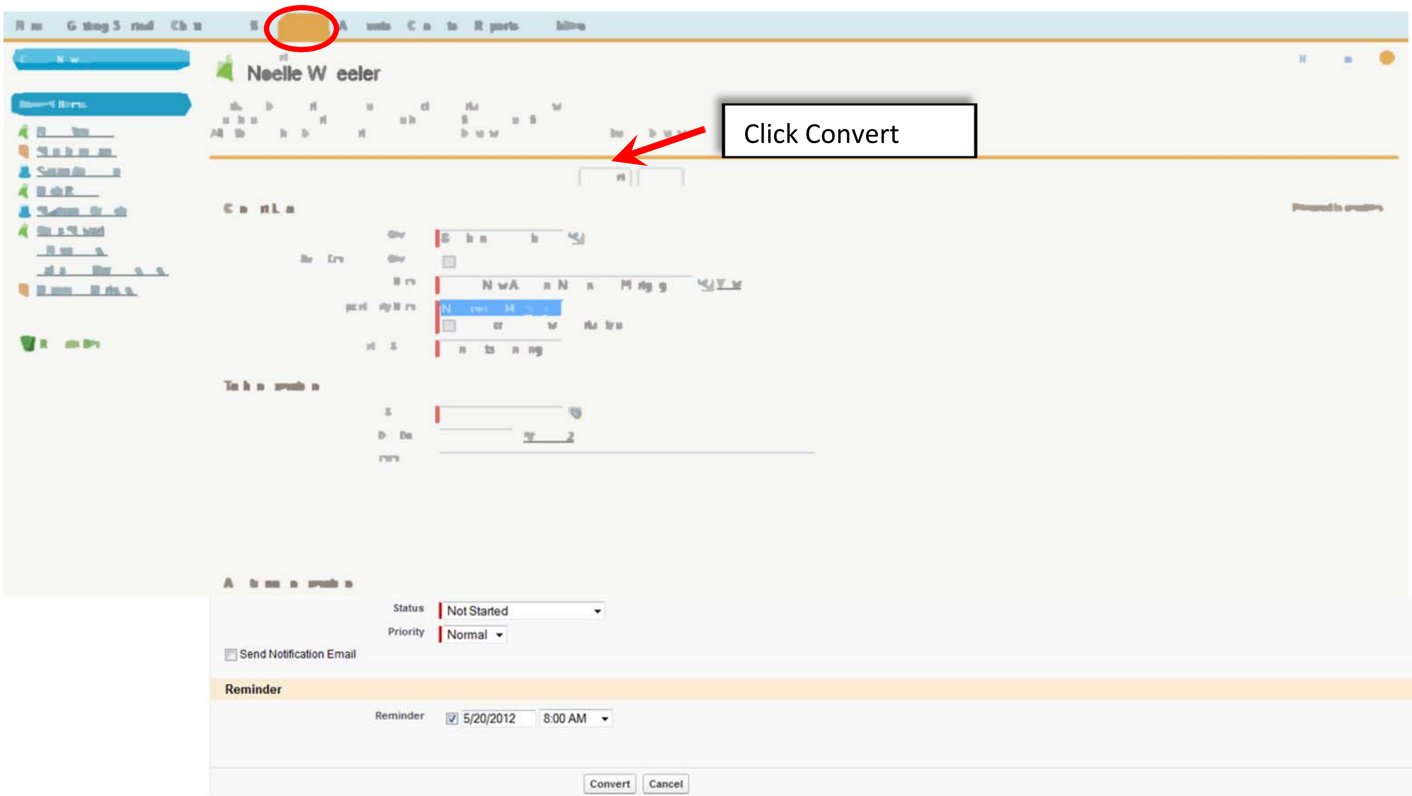

Click Go to sort
Current views for existing leads
All Open Leads
Contracts Pending
My Unread Leads
Recently Viewed Leads
Today's Leads
Click New to add a lead
Home


Click header to sort

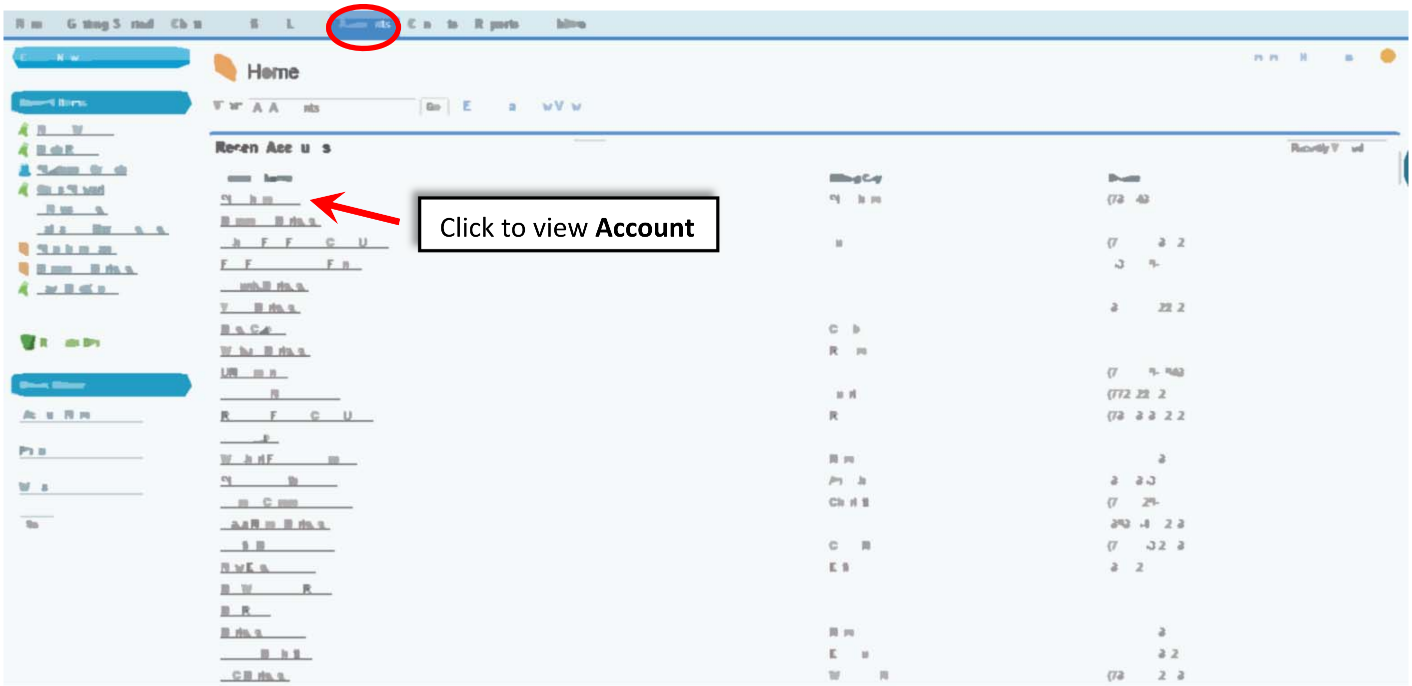

Lead Detail view
New Lead
Complete fields
Click save

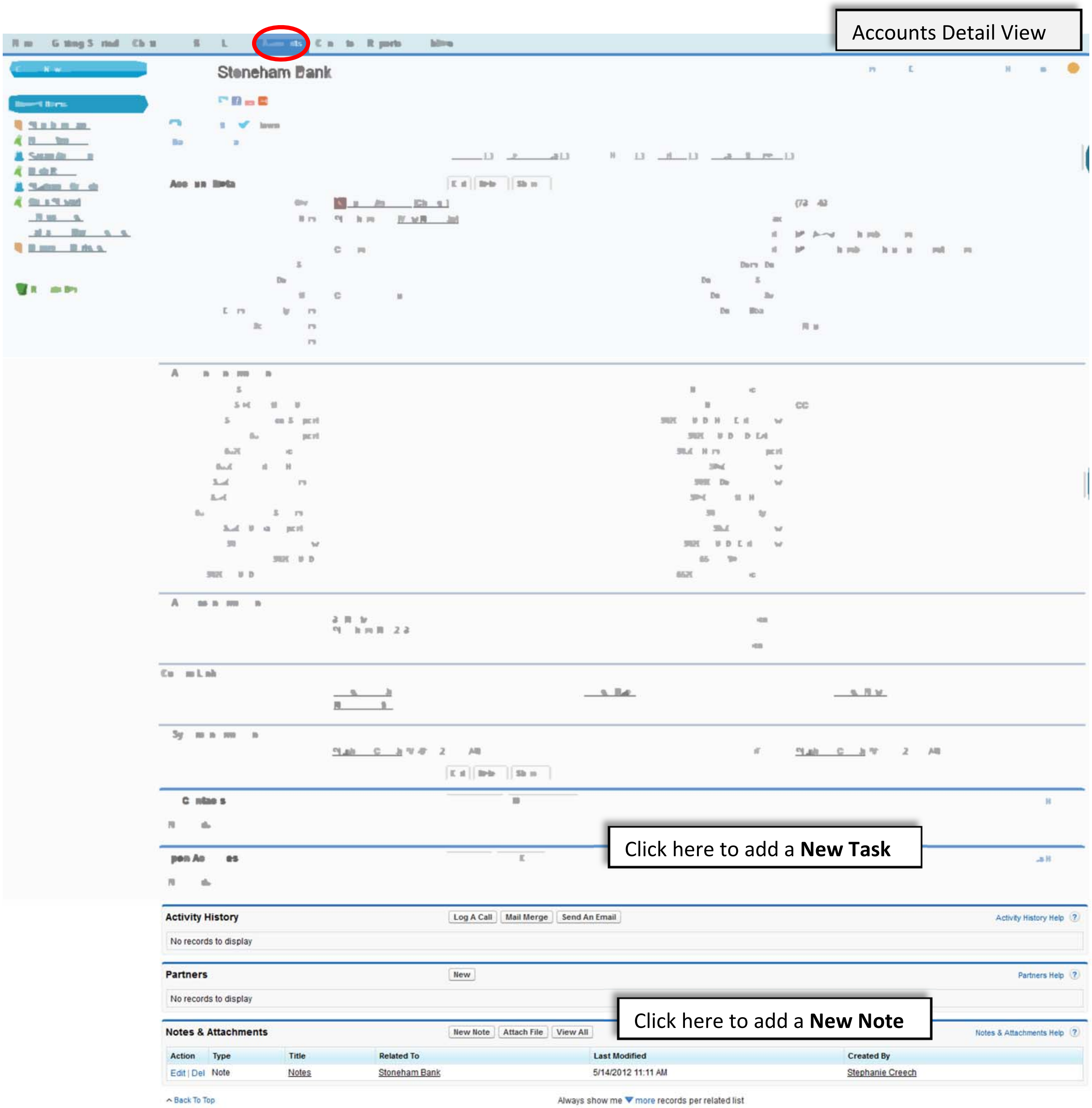
Convert Lead to Account



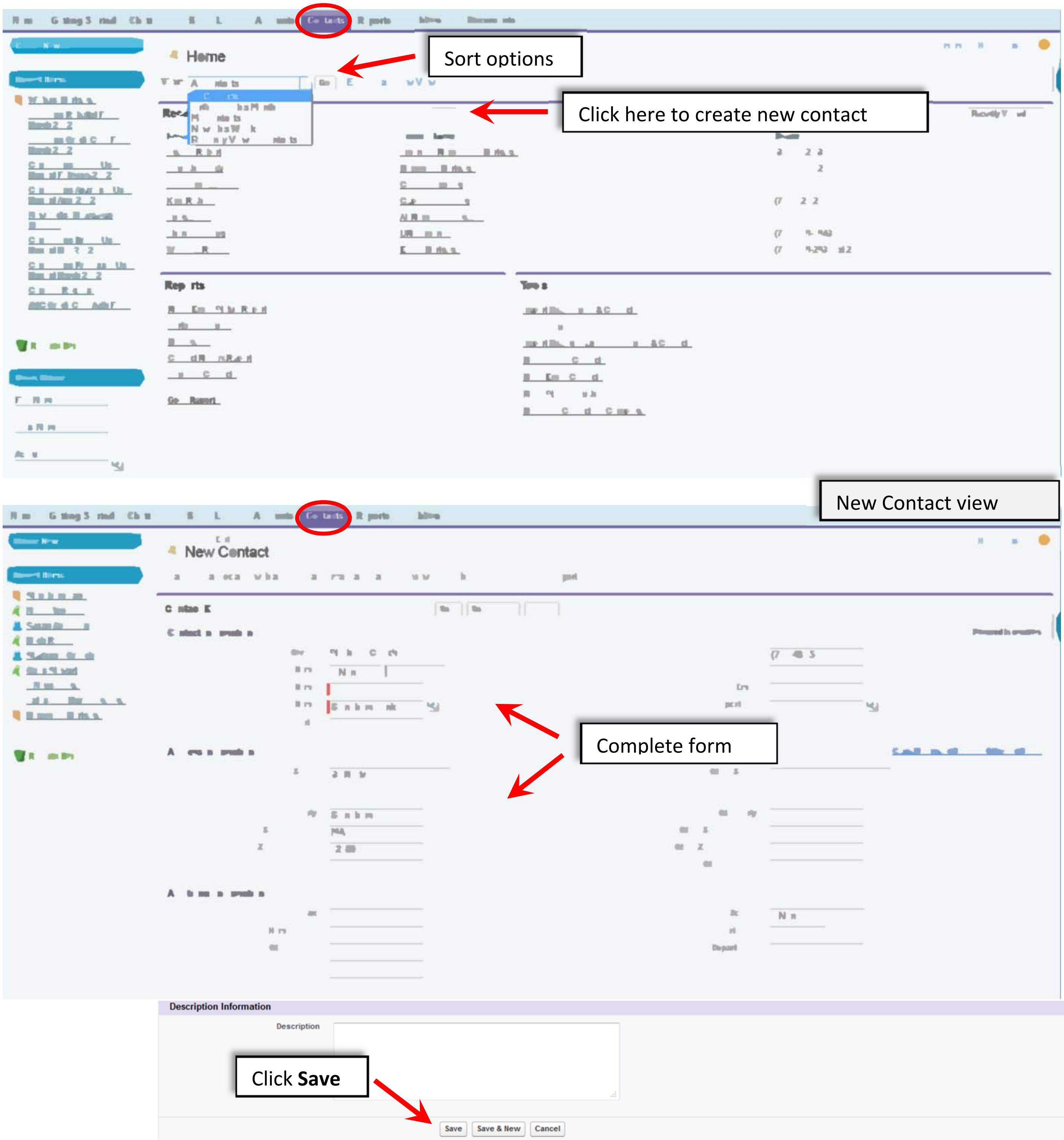


Accounts Tab



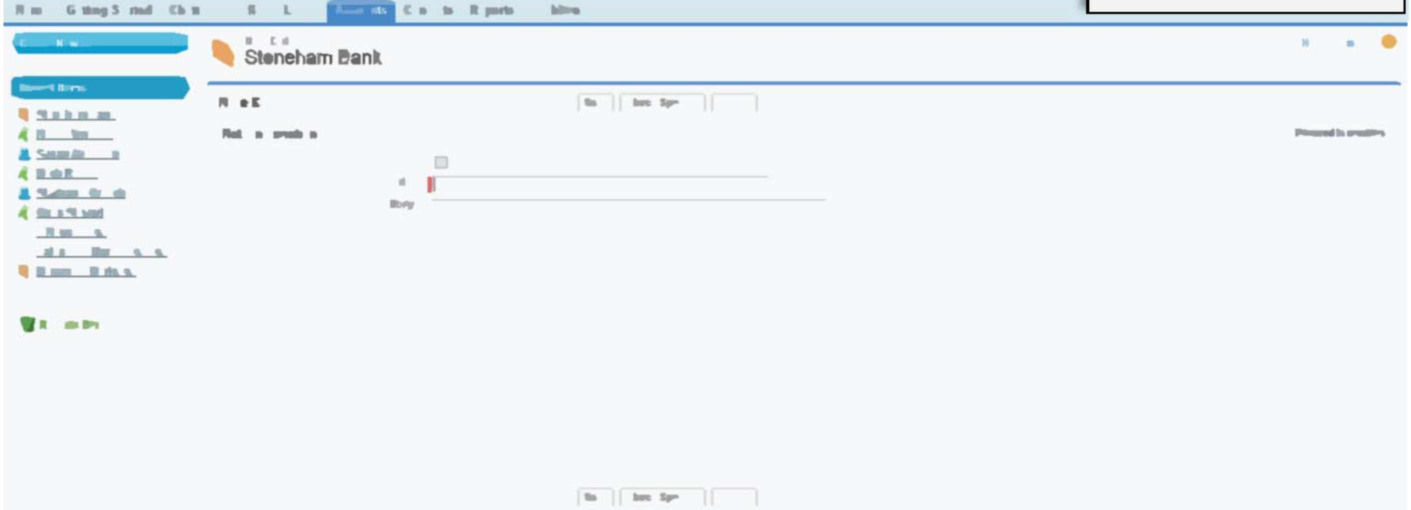

Accounts Detail View
Stoneham Bank
Click here to add a New Task
Activity History
Log A Call
Mail Merge
Send An Email
Activity History Help
No records to display
Partners
New
Partners Help
No records to display
Click here to add a New Note
Notes & Attachments
New Note
Attach File
View All
Notes & Attachments Help
Action
Type
Title
Related To
Last Modified
Created By
Edit | Del
Note
Notes
Stoneham Bank
5/14/2012 11:11 AM
Stephanie Creech
Back To Top
Always show me more records per related list

Contacts Tab



New Task view

New Note view



Dashboards Tab