



(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.



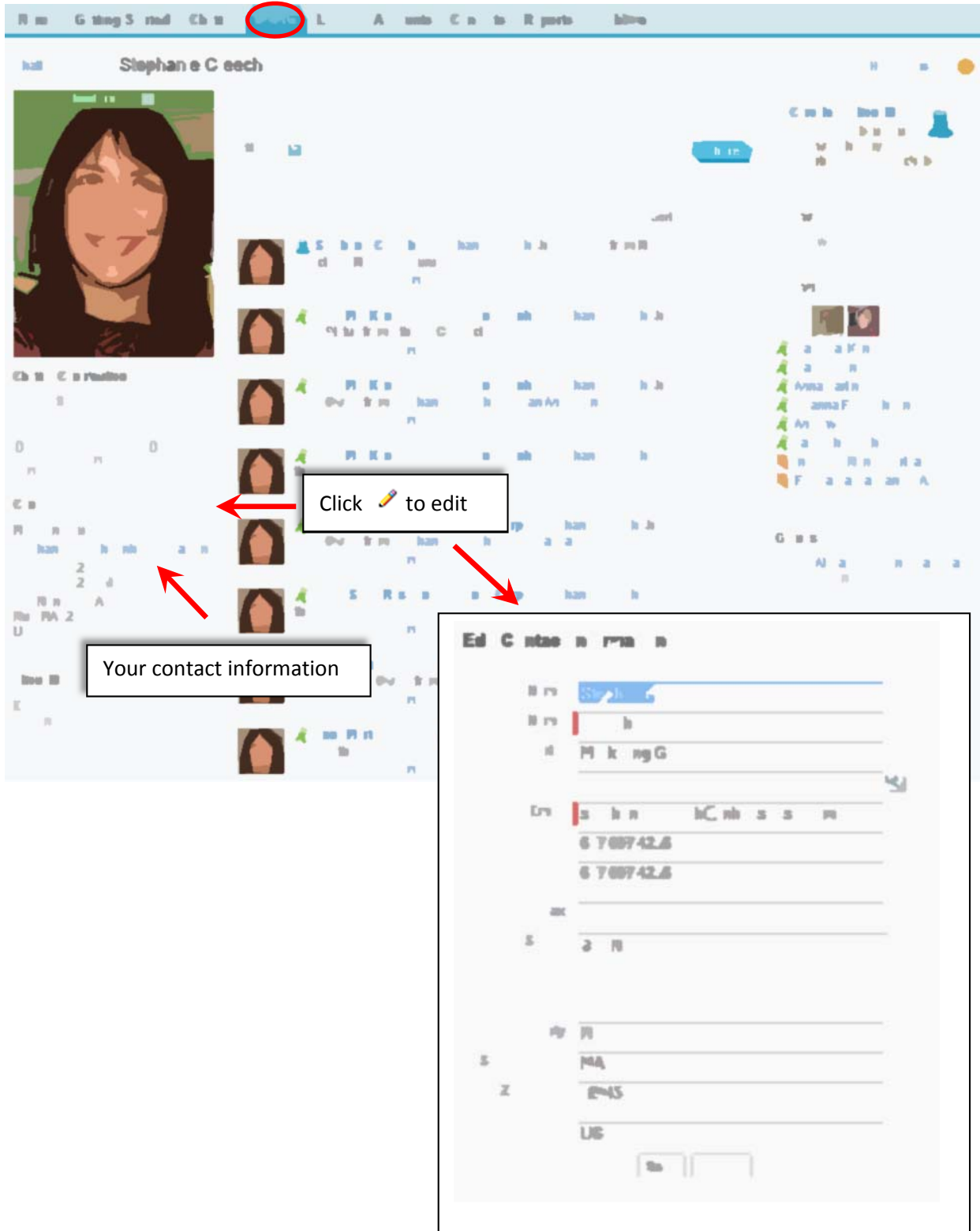
Home Tab

The screenshot shows the Salesforce Home Tab for a user named Stephanie Cochran. The interface includes a navigation bar at the top with a red circle around the Home icon. Below the navigation bar, there is a user profile section with a red arrow pointing to the user's name. The main content area features a dashboard with three charts: a gauge chart for Sales, a pie chart for Marketing, and a bar chart for Support. A text box with the text "At a glance view of your production" is overlaid on the right side of the dashboard. Below the dashboard, there is a "My Tasks" section with a red arrow pointing to it and a text box containing the text "Add New Tasks here". At the bottom, there is a "Calendar" section with a table of tasks.

At a glance view of your production

Add New Tasks here

Profile Tab



The image shows a Salesforce profile page for a contact named 'Stephan e C eech'. The top navigation bar has a 'Profile' tab circled in red. The main content area displays a list of contact cards. A callout box with a pencil icon and the text 'Click [pencil icon] to edit' points to the edit icon on one of the contact cards. Another callout box with the text 'Your contact information' points to the contact's details. A large inset box shows the 'Edit Contact Information' form, which includes fields for first name, last name, phone number, and address.



Leads Tab

This screenshot shows the Salesforce Leads tab interface. A red circle highlights the 'Go to sort' button in the top navigation bar. A red arrow points to the 'Go to sort' button with the text 'Click Go to sort'. Another red arrow points to the 'New' button in the top left corner with the text 'Click New to add a lead'. A third red arrow points to the 'Current views for existing leads' dropdown menu with the text 'Current views for existing leads'. The dropdown menu is open, showing the following options: 'All Open Leads', 'Contracts Pending', 'My Unread Leads', 'Recently Viewed Leads', and 'Today's Leads' (which is highlighted in blue). The main content area shows a list of leads under the heading 'Recent Leads'.

This screenshot shows the Salesforce Leads list view. A red circle highlights the 'Go to sort' button in the top navigation bar. A red arrow points to the 'Name' header in the list view with the text 'Click header to sort'. The list view displays a table of leads with columns for Name, Status, Company, and Date. The 'Name' column header is highlighted in blue.

Name	Status	Company	Date
John Doe	Open	ABC Corp	10/22/2022
Jane Smith	Open	XYZ Inc	10/21/2022
Bob Johnson	Open	DEF LLC	10/20/2022
Alice Brown	Open	GHI Corp	10/19/2022
Charlie Davis	Open	JKL Inc	10/18/2022
Diana Prince	Open	MNO LLC	10/17/2022
Edward Norton	Open	PQR Corp	10/16/2022
Fiona Glenanne	Open	STU Inc	10/15/2022
George Clooney	Open	VWX LLC	10/14/2022
Helen Mirren	Open	YZA Corp	10/13/2022
Ian McKellen	Open	BCD Inc	10/12/2022
Jennifer Lawrence	Open	EFG LLC	10/11/2022
Kevin Costner	Open	HIJ Corp	10/10/2022
Liam Neeson	Open	KLM Inc	10/09/2022
Mel Gibson	Open	NOP LLC	10/08/2022
Nicole Kidman	Open	QRS Corp	10/07/2022
Orlando Bloom	Open	TUV Inc	10/06/2022
Penelope Cruz	Open	WXY LLC	10/05/2022
Robert De Niro	Open	ZAB Corp	10/04/2022
Sandra Bullock	Open	BCD Inc	10/03/2022
Tom Cruise	Open	EFG LLC	10/02/2022
Uma Thurman	Open	HIJ Corp	10/01/2022



Lead Detail view

A screenshot of the Salesforce 'New Lead' form. The form is titled 'New Lead' and contains various input fields for lead information. A red circle highlights the 'Save' button in the top navigation bar. A box labeled 'Complete fields' has two red arrows pointing to the 'Company' and 'Phone' fields. Another box labeled 'Click save' has a red arrow pointing to the 'Save' button at the bottom of the form. The form includes sections for 'Lead Information', 'Address Information', and 'Contact Information'. The 'Company' field is currently empty, and the 'Phone' field contains the number '1234567890'. The 'Save' button is located at the bottom right of the form.



Convert Lead to Account

Lead Detail view

Neelle Wheeler

Lead Info

Convert

Click Convert

Neelle Wheeler

Convert

Click Convert

Status: Not Started

Priority: Normal

Send Notification Email

Reminder: 5/20/2012 8:00 AM

Convert Cancel



Accounts Tab

A screenshot of the Salesforce user interface showing the Accounts tab. The top navigation bar includes the "Accounts" tab, which is circled in red. Below the navigation bar, the "Accounts" list is visible. A red arrow points to the first account entry, and a callout box with the text "Click to view Account" is positioned next to it. The interface also shows a left-hand navigation menu and a top search bar.

Account Name	Billing Category	Balance
Account 1	Category 1	(72,402)
Account 2	Category 2	(7,222)
Account 3	Category 3	2,222
Account 4	Category 4	(7,222)
Account 5	Category 5	(72,222)
Account 6	Category 6	2,222
Account 7	Category 7	(7,222)
Account 8	Category 8	(72,222)
Account 9	Category 9	2,222
Account 10	Category 10	(72,222)



Accounts Detail View

Home | **Accounts** | Contact | Reports | Home

Stoneham Bank

Accounts Detail [Edit] [Share] [Share]

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

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 Creach

[Back To Top](#) Always show me [more records per related list](#)

Click here to add a **New Task**

Click here to add a **New Note**



Contacts Tab

Sort options

Click here to create new contact

New Contact view

Complete form

Click Save



New Task view

This screenshot shows the 'New Task' form in Salesforce. The page title is 'New Task'. On the left, there is a 'Recent Items' sidebar with a list of items. The main form area contains several sections: 'Task E' with a status dropdown; 'To do create a' section with fields for 'Subject', 'Priority' (set to 'High'), 'Due Date' (set to '2'), and 'Assign To' (set to 'John Smith'); 'Attachments' section with a 'Name' field; 'Related To' section with a dropdown set to 'New Start'; 'Resource' section with a dropdown set to 'New'; and 'Priority' section with a dropdown set to 'Scopes 2' and '00AM'. At the bottom, there are buttons for 'Save', 'Save & Continue', and 'Cancel'.

New Note view

This screenshot shows the 'New Note' form in Salesforce for a record titled 'Stoneham Bank'. The page title is 'New Note'. The sidebar on the left is identical to the previous screenshot. The main form area contains: 'Note E' with a status dropdown; 'Related To' section with a dropdown set to 'Stoneham Bank'; a 'Body' text area; and a 'Priority' dropdown set to 'High'. At the bottom, there are buttons for 'Save', 'Save & Continue', and 'Cancel'.



Dashboards Tab

