Session 4 Homework

Trailhead moduls:

- Account + Contact: [Accounts and Contacts]
- Lead + Opportunity: [Leads and Opportunities]
- Product, Quote, Contract: [Products, Quotes, & Contracts]
- Sales Path: [Customize a Sales Path for Your Team]

Additional Exercises (after completing the above moduls and if you are in the mood ☺)

Use a new playgorund for these exercises!

Account Hierarchy

Experiment with account hierarchies!

Under the Get Cloudy account you should create 4 **child** accounts. We recommend to use the following naming convention: `Get Cloudy + [Location of the Account]`.

Check out the Account hierarchy that you just created!

Hint: Use the Parent Account field ont he child account creation!

Contacts To Multiple Accounts

During completing the required Trailhead modules for today's session, you must have run into that linking a contact to multiple accounts is possible. (See the [Understand Account and Contact Relationships] module.)

Dig deeper in this topic, check how to enable it in your org, make the necessary changes to be able to try out this feature.

Kanban

Check the Opportunities in your Org's pipeline on Kanban view!

Try to group them by *Type* or *Source* and summarize by *Expected Revenue*.

Better Together

Your Org would like to use Opportunity Teams. Make it happen! Find out how to enable it and then try it out!

Add new users if you don't have anyone else to add besides yourself.

You can also experiment with default opportunity teams.

Time to Split

Assuming that in your Org there are already multiple teams working on opportunities, it's time to enable Opportunity Splits and add them to the layouts!

Find out how to enable them, edit the layouts and think how would they work in different business scenarios!

Customize them if needed!