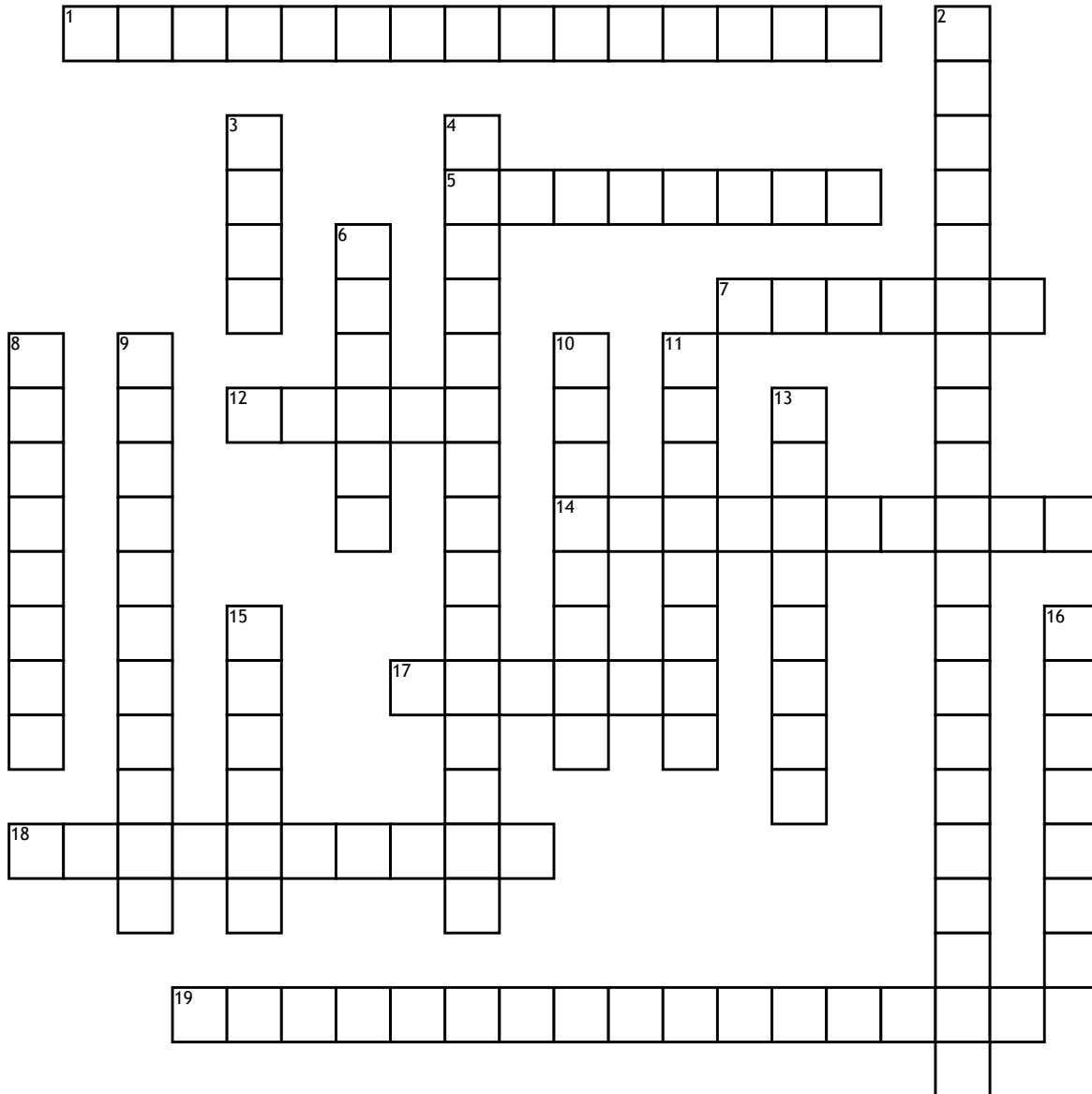Name: _____   Date: _____

Salesforce Terms

Across

1. A section of the Customer Entity page displaying the products/services sold to a customer and their related entities. Relationship Sheets are still the most complete list of products

5. An individual or business who currently has no products or services.

7. , Records are individual entries in Salesforce such as a specific Lead, Entity, Contact, Activity, Referral or Opportunity

12. An in-person meeting with a prospect, customer or COI.

14. The group of PUB employees working with the Entity (i.e. Commercial, Wealth, TMSO, Producer, Branch Manager, etc.).

17. only availabe to Retail Bankers III & IV. A sales effort logged for a product you sell. My Sales populate pipeline reports, as do Opportunities

18. Primary owner of the customer or prospect who serves as the quarterback for the entire relationship and cross-sells all bank products. "Virtual RM" displays where no Entity Owner is identified or for Retail-only relationships.

19. A potential prospect/customer of the bank for whom no specific sales opportunity has been identified. Once an Opportunity (need) is identified, a Lead record is converted to an Entity record.

Down

2. An identified potential sale for a product you do not sell. Qualified referrals are converted to Opportunities by the person selling the product/service.

3. A to-do item or reminder.

4. The group of PUB employees working on an opportunity. Opportunity Team members must be added by the Opportunity Owner and then have all the same access/permissions as the Opportunity Owner

6. A broad type of records. In spreadsheet terms, an object is a column. Ex. Contacts in general are an object type.

8. A task or event that has already taken place and entered afterward.

9. A sales effort logged for a product you sell. Opportunities populate pipeline reports, as do My Sales.

10. A Center of Influence (COI) whether individual or business.

11. An individual or business that has an active product or service.

13. Log a call, Task, Event

15. Prospect Customer External

16. Individuals that are associated with Entity records and serve as the point people for communications and marketing.