

Tracking a business transaction in the cloud and core

● Marketing Cloud ● Sales Cloud ● Billing Cloud ● Core



INTEREST

A tweet in a new marketing campaign elicits a customer response.

LEAD

The customer requests a demo and receives an email from the company.

OPPORTUNITY

A marketing rep assigns the lead to a sales rep for review.

QUOTE

The sales rep creates a quote and converts the lead to a new account.

CREDIT

A collections agent performs a credit check and assigns a credit limit.

CONTRACT

With approval from the sales manager, the sales rep creates a contract.

ORDER

The sales rep closes the opportunity and initiates order fulfillment.

PROVISIONS

The provision manager creates license keys for the customer.

BILLING

The customer receives an invoice and serial keys from the collections agent.

PAYMENT

The collections agent follows up with the customer about payment.

REQUEST

The customer has a customer service request.

SERVICE

A service rep responds to the request and then resolves the case.