

# Key Terms and Definitions

# Key Terms and Definitions – Salesforce Tools

---

## Sales Cloud

- Customer relationship management (CRM) application designed to **support sales, marketing and customer support. Only G&W Electric users have license to this application.**

## Service Cloud

- Customer relationship management (CRM) application for **customer service and support.** G&W Electric AMS team utilizes for Field Service Requests and Scheduling.

## Community Portal

- Sales Cloud application connection for G&W Electric outside sales reps. This portal is where the Sales Rep will log in, manage leads, enter new opportunities, request quotes and submit POs.

# Key Terms and Definitions – Salesforce Objects

---

## Pardot

- Pardot is Salesforce's Business to Business (B2B) marketing automation tool. It automates our marketing activities such as email, campaign lead nurturing, lead profiling and grading to unite marketing and sales teams.

## Leads

- Location where MQL (marketing qualified leads) - potential new customers obtained **typically through marketing activities** including but not limited to: tradeshow, conferences, website, email, campaigns, social media etc... are entered, assigned and managed.

## Accounts

- Location where individual customer accounts, organizations or partners involved with business are stored.

## Contacts

- Location for stored personal contact information such as name, email, address, phone, anniversary, birthday etc...

# Key Terms and Definitions – Salesforce Objects cont'd

---

## Opportunities

- Makes up the sales pipeline with pending sales opportunities and contributes to the sales forecast. This is where the sales reps manage the opportunities through the sales stages from Opportunity > Quote > Order.

## Quotes

- Stages where our Application Engineer / Proposal teams receive and manage the quote through the process to convert to an order.

## Orders

- Stages in the process where the Application Engineer / Proposal teams receive the PO, review the order information, send to Customer Support for review and enter order into JDE.

## Campaigns

- Object in Salesforce used by the G&W Electric marketing team to track marketing campaign success through lead generation. Leads will be linked to the appropriate campaign by marketing and assigned to the appropriate Sales Representative.