

Logging an Event to Opportunity

08/12/2024 5:50 pm EDT

This section will cover how to log an event to an opportunity directly in SFDC outside of the outlook plug-in integration process.

1. **Log into Salesforce:** Access your Salesforce account by logging in with your credentials.
2. **Navigate to Opportunities:** Go to the “Opportunities” tab from the main navigation menu or use the App Launcher to search for “Opportunities.”
3. **Select the Opportunity:** Find and click on the specific Opportunity to which you want to log the event. You can use the search bar or view the Opportunity list.
4. **Access Activity & Events:** On the Opportunity record page, locate the “Activity” or “Activity & Events” section. This is usually found in the related lists or as part of the record’s details.
5. **Log an Event:** Click on the “Add Event” button.
6. **Fill in Event Details:** Enter the details of the event, including the subject, start and end time, location, and any additional comments or notes. You can also add attendees if relevant.
7. **Save the Event:** Click “Save” or “Log Event” to record the event to the Opportunity.
8. **Verify Event:** Ensure the event appears in the Activity timeline or related list on the Opportunity record.
9. **Edit Event and Select Type:** Once the event is logged select the edit button on the event and select the appropriate selection for Type field based on definitions below.

Select **Edit**



Select **Type**



Event Type Selections and Descriptions

Event Types	Product	Definition
Discovery Call – Net New	Net New SO, MG, AB	Discovery call with net new prospect
Discovery Call – SO Upsell	SO	Discover call with existing SedonaOffice customer for an add-on module or integration
Discovery Call – MG Upsell	MG	Discover call with existing Managely customer for an add-on module, integration or tier upgrade
Discovery Call – SO to MG Migration	MG	Discover call with existing SedonaOffice customer for potential move to Managely

Discovery Call – AB to MG Migration	MG	Discover call with existing AlarmBiller customer for potential move to Managely
Account Review – SedonaOffice	SO	Account Review with existing SedonaOffice customer (can turn into future discovery call based on areas of focus discussed)
Account Review – AlarmBiller	AB	Account Review with existing AlarmBiller customer (can turn into future discovery call based on areas of focus discussed)
Account Review – Managely	MG	Account Review with existing Managely customer (can turn into future discovery call based on areas of focus discussed)
Scoping Call – Custom Development	All	Scoping call with customer or internal on customer funded development project
Scoping Call – Professional Services	All	Scoping call with customer on professional services engagement
CSAT – Managely	MG	Customer satisfaction call for Managely (issues related to product, billing, onboarding, support, sales, etc)
CSAT – SedonaOffice	SO	Customer satisfaction call for SedonaOffice (issues related to product, billing, onboarding, support, sales, etc)
CSAT – AlarmBiller	AB	Customer satisfaction call for AlarmBiller (issues related to product, billing, onboarding, support, sales, etc)
Closing Meeting	SO, AB	Last meeting where final terms has been negotiated and we are walking through DocuSign with expectation of signature
Kick-Off Call	All	Kick off call post execution of agreement with customer and PM
Post Demo Meeting	All	Internal - Internal meeting post demo with internal stakeholders
SO - 1st Demo	SO	Net New - 1st product demonstration of the SedonaOffice application

SO - 2nd+ Demonstration	SO	Net New - 2nd+ product demonstration of the SedonaOffice application
SO - Add-On Module Demo	SO	Existing - Demonstration of add-on module or integration for SedonaOffice
Misc	All	Any meeting outside of event types listed
MG - 1st Demo	MG	Net New - 1st product demonstration of the Managely application
MG - 2nd + Demo	MG	Net New - 2nd+ product demonstration of the Managely application
MG - Add-On Modules Demo	MG	Existing - Demonstration of add-on module or integration for Managely
MG - Closing Call	MG	Last meeting where final terms has been negotiated and we are walking through DocuSign with expectation of signature
MG - Proposal Review	MG	Review proposal w/ prospect
