PaperMore Salesforce Org

Salesforce URL : https://papermore-dev-ed.my.salesforce.com
Admin : Gowri Malepate

2nd Admin Username : salesforce.team@gowrimalepate.dev

Sales & Support Process Requirements

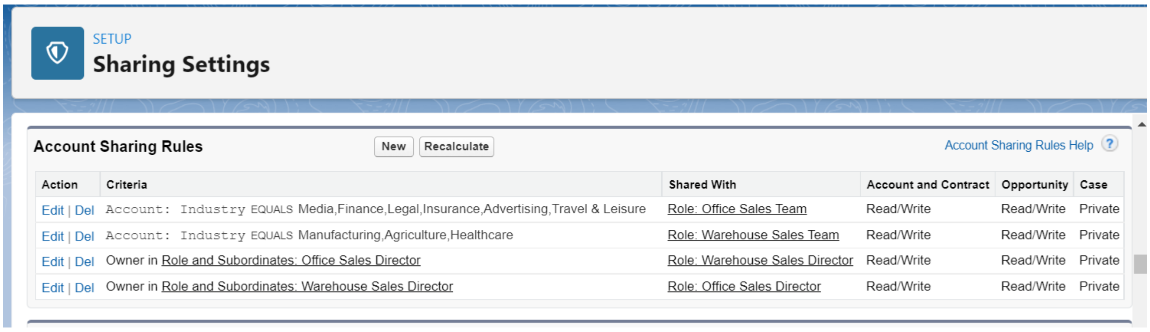
Account Fields

Field Name	**API Name**	**Datatype**	**Value**	**Default / Custom**	**Comments**
Account Name	Name	Name		Default	
Employees	NumberOfEmployees	Number		Default	Rename label to "Number Of Employees"
Account Number	AccountNumber	Text		Default	
Industry	Industry	Picklist	• Legal • Finance • Travel & Leisure • Media • Insurance • Advertising • Healthcare • Agriculture • Manufacturing	Default	
Billing Address	BillingAddress	Address		Default	
Shipping Address	ShippingAddress	Address		Default	
Phone	Phone	Phone		Default	Rename label to "Account Phone"
Type	Type	Picklist	• Office • Warehouse	Default	Rename label to "Account Type"
VIP Account	VIP_Account__c	Formula (checkbox)	Checked if accounts	Custom	

			belonging to Finance or Insurance industries have greater than 500 employees		

FR - As an Administrator, I want to have the below sharing settings. The Sales Directors have requested that the sales team members should only be able to see Accounts that belong to industries covered by their team.The Office Sales team should be able to edit all Accounts belonging to the industries that the Office Sales team covers, however, they should only be able to view Opportunities of other team members.The Warehouse Sales team should be able to edit all Accounts and Opportunities belonging to the industries that the Warehouse Sales team covers. oth Sales Directors should be able to view and edit all Accounts and Opportunities.

Account Sharing Rules :
https://papermore-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/home


SETUP
Sharing Settings

Account Sharing Rules New Recalculate Account Sharing Rules Help

Action	Criteria	Shared With	Account and Contract	Opportunity	Case
Edit | Del	Account: Industry EQUALS Media,Finance,Legal,Insurance,Advertising,Travel & Leisure	Role: Office Sales Team	Read/Write	Read/Write	Private
Edit | Del	Account: Industry EQUALS Manufacturing,Agriculture,Healthcare	Role: Warehouse Sales Team	Read/Write	Read/Write	Private
Edit | Del	Owner in Role and Subordinates: Office Sales Director	Role: Warehouse Sales Director	Read/Write	Read/Write	Private
Edit | Del	Owner in Role and Subordinates: Warehouse Sales Director	Role: Office Sales Director	Read/Write	Read/Write	Private

Opportunity Permission to be added to Office Sales Team User to allow them to view other teams opportunity -

https://papermore-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS8d000000Keop

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Contact Fields

Field Name	**API Name**	**Datatype**	**Value**	**Default / Custom**	**Comments**
Name	Name	Name		Default	Rename label to "Contact Name"
Email	Email	Email		Default	Rename label to "Contact Email"

Mobile	MobilePhone	Phone		Default	Rename label to "Contact Number"
Job Title	Job_Title__c	Picklist	• Executive Assistant • Facilities Manager • Office Manager • Operations Director	Custom	

Opportunity Fields

Field Name	**API Name**	**Datatype**	**Value**	**Default / Custom**	**Comments**
Closed Lost Reason	Closed_Lost_Reason__c	Picklist	• Timing • Product Suitability • Price	Custom	

FR - Add a Validation to mandate Closed Lost Reason if Stage = Closed Lost

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Case Fields

FR - Create two new Case Record Types

- Office Collection (Case (Sales) Layout page assignment)
- Warehouse Collection (Case (Support) Layout page assignment)

Field Name	**API Name**	**Datatype**	**Value**	**Default / Custom**	**Comments**
Status (Office Collection)	Status	Picklist	• New • Collection Confirmed • Collection Completed	Default	
Status (Warehouse	Status	Picklist	• New • Load	Default	

Collection)			Assessment • Access Assessment • Collection Confirmed • Collection Completed		
Number of Site Vehicle Access Points	Number_of_Site_Vehicle_Access_Points__c	Number		Custom	Access Assessment Information Section
Maximum Vehicle Width	Maximum_Vehicle_Width__c	Picklist	• 5.5 ft • 6.5 ft • 10 ft	Custom	Access Assessment Information Section
Opportunity Name	Opportunity_Name__c	Lookup(Opportunity)		Custom	

FR - Add a validation to mandate Number of Site Vehicle Access Points & Maximum Vehicle Width if Case Record Type = Warehouse Collection & Case Status = Collection Confirmed

FR - Add a validation to require all users (except Gowri) to update Status to another value before updating to 'Collection Completed', for all case record types.

FR - Add the below Account fields on Case lightning Page. Configure the lightning page without creating additional formula fields

- Account Name
- Account Number
- Industry
- VIP Account
- Account Phone
- Shipping Address (which they use as the collection address).

FR - Create the below New Products

Product	Price for Office Collections	Price for Warehouse Collections
Recycling Collection (Max 50L Capacity)	£120	£110
Recycling Collection (Max 100L Capacity)	£200	£180
Recycling Collection	£300	£280

(Max 150L Capacity)		

Auto create a Case when a Opportunity is Closed-Won

FR - Build a process builder for when an Opportunity is Closed Won: If the Account is an Office Account , a case should be created and include the following information:

- Account
- Opportunity
- Case Priority: Medium
- Case Status: New
- Subject: <Account Name> - Book in Collection
- Case Owner : **Office Collection Queue**

(https://papermore-dev-ed.lightning.force.com/lightning/setup/Queues/page?address=%2Fp%2Fown%2FQueue%2Fd%3Fid%3D00G8d000000me19)

If the Account is a Warehouse Account , a case should be created with the following information:

- Account
- Opportunity
- Case Priority: High
- Case Status: New
- Subject: <Account Name> - Book in Collection
- Case Owner : **Warehouse Collection Queue**

(https://papermore-dev-ed.lightning.force.com/lightning/setup/Queues/page?address=%2Fp%2Fown%2FQueue%2Fd%3Fid%3D00G8d000000me1E)

Process Builder link

https://papermore-dev-ed.lightning.force.com/lightning/setup/ProcessAutomation/home

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Auto delete all related case records when a Won Opportunity is Closed-Lost

FR - Build a flow for when an Opportunity has been Closed Won, a case is created. If a sales user changes the Opportunity Stage from Closed Won to Closed Lost:
1. Any cases related to the Opportunity should be deleted.
2. An email should be sent to the Opportunity’s Account Owner to inform them that the Opportunity has been closed including the reason for the Opportunity being Closed Lost.

3. If the Lost Reason on the Opportunity is “Timing” a new follow up Opportunity should be generated against the account with a close date of 6 months after the original opportunity was Closed Lost and the same Opportunity Products and Prices copied across to the new Opportunity.

Flow link

https://papermore-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3018d000000I0pfAAA
