**Excercise**

An opportunity has the following progressive stages:

● Open stages: Prospecting, Qualified, Pitched, Verbal Commit

● Closed stages: Closed/Won, Closed/Lost

The following opportunity contact roles are used:

● Finance

● Decision Maker

● Influencer

● IT

● Business Owner

● Executive sponsor

Specific opportunity contact roles must be present for each stage to be selected.

Implement a solution to validate the opportunity has the required contact roles when the user

updates the stage field.

Keep in mind:

● Opportunity stages may change over time

● Opportunity contact roles may change over time

Please document all configurations and code for this solution.

The solution must be ready for deployment to Production.

**Solution:**

Whenever Stage is updated on Opportunity, the system will check weather opportunity has required Contact Roles associated or not, if validation fail, the system will show error message under Stage field.

1. Add new stage values as open to Opportunity stage
   1. Prospecting
   2. Qualified
   3. Pitched
   4. Verbal Commit
2. Add Contact roles to Opportunity Contact Role values
   1. Finance
   2. Decision Maker
   3. Influencer
   4. IT
   5. Business Owner
   6. Executive sponsor
3. Create Custom metadata (*Stage\_To\_ContactRole\_\_mdt* ) for mapping between Stage and Contact Role. As per the requirement, assumed the stage will be required only single contact role. The future changes related to Stage or contact role will be accommodate by changing corresponding mapping record.
4. Create two new custom text fields for Stagename (StageName\_\_c) and Contact role (Contact\_Role\_\_c) to create mapping records

|  |  |
| --- | --- |
| StageName\_\_c | Contact\_Role\_\_c |
| Closed Won | Executive sponsor |
| Closed Lost | Business Owner |
| Pitched | Influencer |
| Prospecting | Finance |
| Qualified | Decision Maker |
| Verbal Commit | IT |

5) Create one custom lookup field (Contact\_\_c) with Contact Object to create Contact role record when opportunity created.

**Source Code:** Please click on below Github link to access Opportunity trigger [**ValidateOppStageByContactRole**](https://github.com/chandrasekhar2424/ValidateOppStageByContactRole.git)

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