

Challenge 3 Steps:

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| Action | Stage Name | API Name | Type | Probability | Forecast Category | Chart Colors | Modified By | |
|---|----------------------|----------------------|------------|-------------|-------------------|----------------------|-------------|------|
| Edit Del Deactivate | Prospecting | Prospecting | Open | 10% | Pipeline | Assigned dynamically | | 6 AM |
| Edit Del Deactivate | Qualification | Qualification | Open | 10% | Pipeline | Assigned dynamically | | 6 AM |
| Edit Del Deactivate | Needs Analysis | Needs Analysis | Open | 20% | Pipeline | Assigned dynamically | | 6 AM |
| Edit Del Deactivate | Value Proposition | Value Proposition | Open | 50% | Pipeline | Assigned dynamically | | 6 AM |
| Edit Del Deactivate | Id. Decision Makers | Id. Decision Makers | Open | 60% | Pipeline | Assigned dynamically | | 6 AM |
| Edit Del Deactivate | Perception Analysis | Perception Analysis | Open | 70% | Pipeline | Assigned dynamically | | 6 AM |
| Edit Del Deactivate | Proposal/Price Quote | Proposal/Price Quote | Open | 75% | Pipeline | Assigned dynamically | | 3 AM |
| Edit Del Deactivate | Negotiation/Review | Negotiation/Review | Open | 90% | Pipeline | Assigned dynamically | | 3 AM |
| Edit Del Deactivate | Closed Won | Closed Won | ClosedWon | 100% | Closed | Assigned dynamically | | 3 AM |
| Edit Del Deactivate | Closed Lost | Closed Lost | ClosedLost | 0% | Omitted | Assigned dynamically | | 3 AM |
| Edit Del Deactivate | Submitted Project | Submitted Project | ClosedWon | 100% | Closed | Assigned dynamically | | 3 AM |
| Edit Del Deactivate | Resubmit Project | Resubmit Project | ClosedWon | 100% | Closed | Assigned dynamically | | 3 AM |

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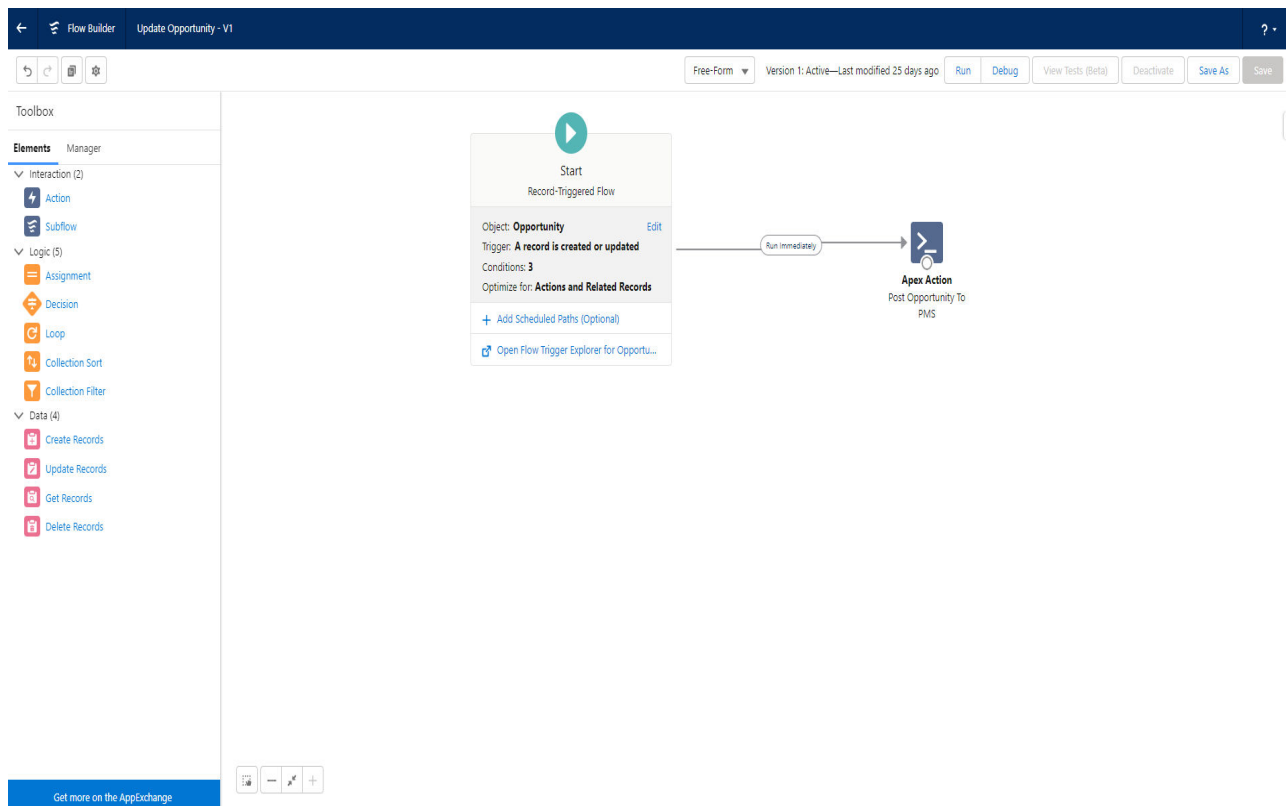
Printable View

Chart Colors

Opportunity Type Picklist Values Help

| Action | Values | API Name | Default | Chart Colors | Modified By | |
|---|---------------------------------|---------------------------------|--------------------------|----------------------|-------------|-------|
| Edit Del Deactivate | Existing Customer - Upgrade | Existing Customer - Upgrade | <input type="checkbox"/> | Assigned dynamically | | 6 AM |
| Edit Del Deactivate | Existing Customer - Replacement | Existing Customer - Replacement | <input type="checkbox"/> | Assigned dynamically | | 6 AM |
| Edit Del Deactivate | Existing Customer - Downgrade | Existing Customer - Downgrade | <input type="checkbox"/> | Assigned dynamically | | 6 AM |
| Edit Del Deactivate | New Customer | New Customer | <input type="checkbox"/> | Assigned dynamically | | 16 AM |
| Edit Del Deactivate | New Project | New Project | <input type="checkbox"/> | Assigned dynamically | | 33 AM |

Inactive Values



Flow Builder: Update Opportunity - V1

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Opportunity

Configure Trigger

* Trigger the Flow When:

- ☐ A record is created
- ☐ A record is updated
- ☒ A record is created or updated
- ☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND) [New](#) [Formulas for Conditions](#)

| Field | Operator | Value | |
|-----------|----------|-------------|--|
| Type | Equals | New Project | |
| AND | | | |
| StageName | Equals | Closed Won | |

Cancel Done