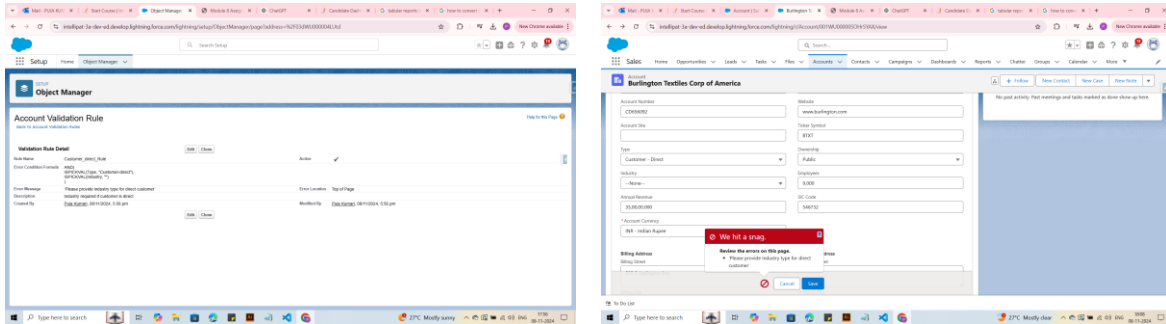
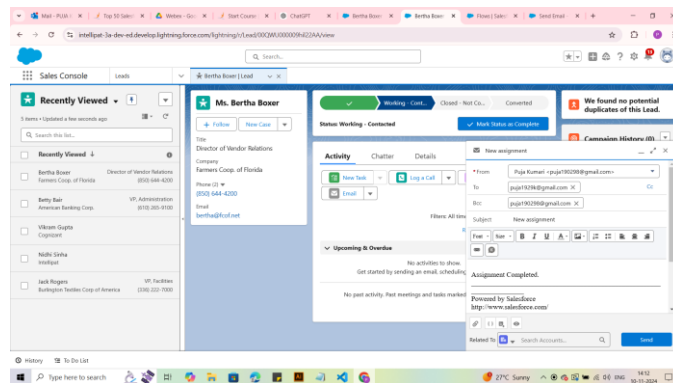
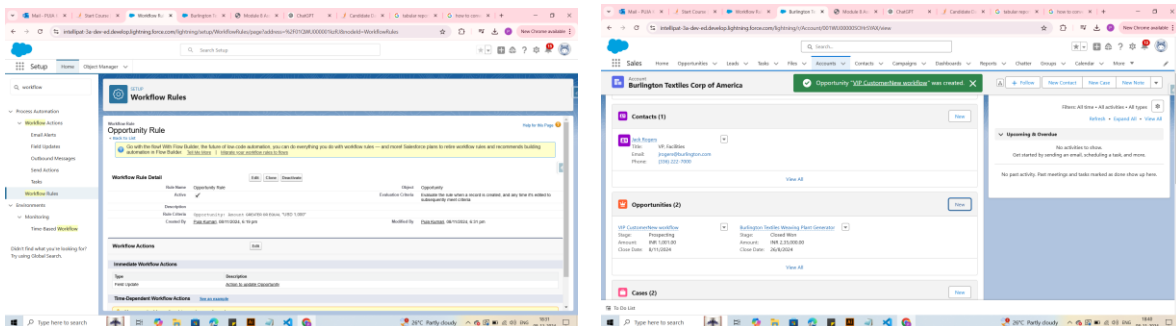


Assignment 8

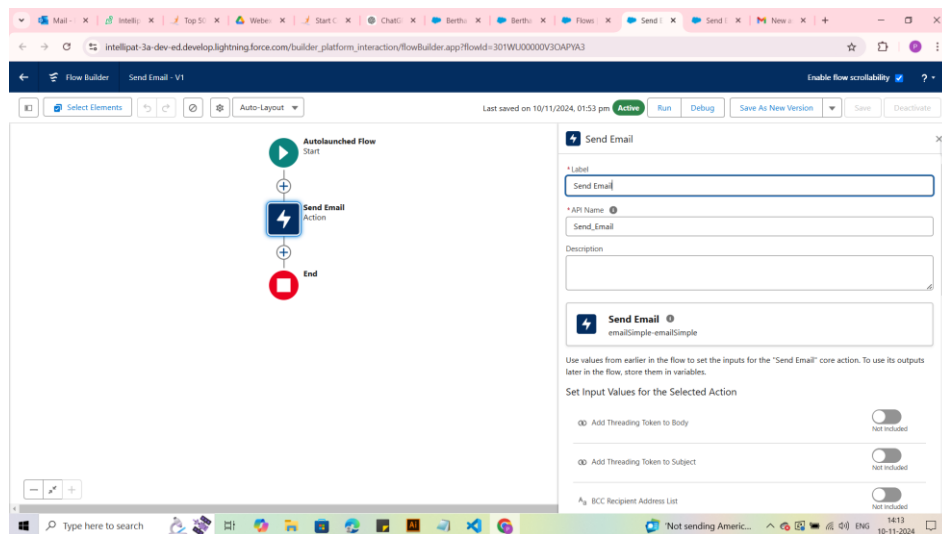
1. Create a validation rule for the Accounts object where the type is 'Customer-direct' and industry is ' ' with an error message 'Please provide industry type'.



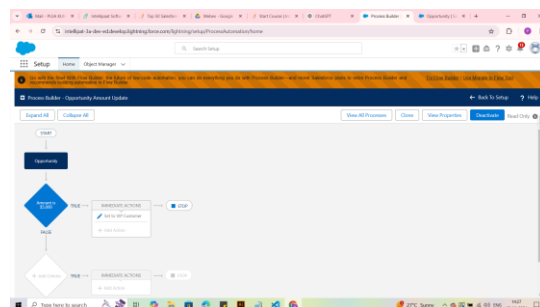
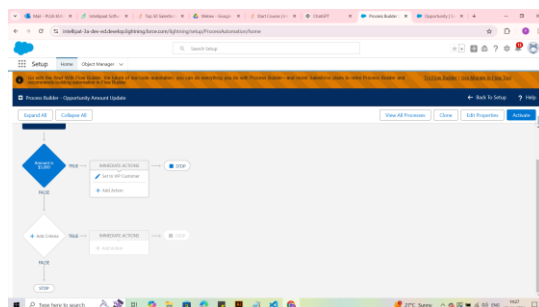
2. Create workflow rules for the Opportunity object where the opportunity amount is greater than US\$1000. Add workflow actions for updating the Opportunity field with the formula 'VIP Customer'+ Name if the amount of the opportunity is greater than US\$1000.



3. Create a flow for sending an email with Screen Flow as 'Auto launched Flow' and add the flow to the Leads object.



4. Create a process builder for the Opportunity object with an amount field. When the opportunity amount is US\$5000, update the record as 'VIP Customer'.



5. Approval Process

SETUP

Approval Processes

Approval Processes

Opportunity: Opportunity Approval

[Back to Approval Process List](#)

Process Definition Detail

Edit

Close

Deactivate

Process Name

Opportunity Approval

Active

✓

Unique Name

Opportunity_Approval

Next Automated Approver Determined By

Description

Entry Criteria

Opportunity: Amount GREATER THAN "USD 1,00,000"

Record Editability

Administrator ONLY

Allow Submitters to Recall Approval Requests

☐

Approval Assignment Email Template

Initial Submitters

Opportunity Owner

Created By

Puja Kumar

Modified By

Puja Kumar

13/11/2024, 8:00 pm

Initial Submission Actions

Add Existing

Add New

Action

Type

Description

Edit

Remove

Field Update

Update Record

Record Lock

Lock the record from being edited

Field Update

Update Record

Sales Console

Accounts

Burlington Textiles C...

Opportunity was submitted for approval.

Burlington Textiles Weaving Plant Generator

Account Name

Burlington Textiles Corp of America

Close Date

28/08/2024

Amount

INR 2,35,000.00

Opportunity Owner

Puja Kumar

Stage: Negotiation/Review

Activity

Details

Chatter

New Task

Log a Call

New Email

Email

Upcoming & Overview

No activities to show

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Products (0)

Notes & Attachments (0)

Contact Roles (0)

Partners (0)

Stage History (3)

Stage: Negotiation/Review

Amount: INR 2,35,000.00

Probability: 60%

Approval History (2)

Step 1

Date: 13/11/2024, 8:18 pm

Status: Pending

Assigned To: Sam Carl

Actual Appr...: Sam Carl

Comments:

Approval Request Submitted

Date: 13/11/2024, 8:18 pm

Status: Submitted

Assigned To: Puja Kumari

Actual Appr...: Puja Kumari

Comments: Please approve this Opportunity.

View All

Sales Console						
Accounts						
Burlington Textile... Burlington... Approval...						
Opportunities > Burlington Textiles Weaving Plant Generator						
Approval History						
2 items • Sorted by Is Pending • Updated a few seconds ago						
Step Name	Date	Status	Assigned To	Actual Approver	Comments	
1 Step 1	13/11/2024, 8:23 pm	Approved	Sam Carl	Puja Kumari	Approved	
2 Approval Request Submitted	13/11/2024, 8:18 pm	Submitted	Puja Kumari	Puja Kumari	Please approve this Opportunity.	