

Process Automation Specialist

(click here to get redirected)

Challenge 1: A quiz in which I have scored a 100% score

Challenge 2: Automate Leads (Below the step by step screenshots of what were we supposed to do in this challenge)

The screenshot shows the Salesforce Setup interface for the Lead object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a Lead Validation Rule named "Country_Name". The rule is active and has the following formula:

```
OR(AND(LEN(State) > 2,  
NOT(CONTAINS('AL:AK:AZ:AR:CA:CO:CT:DE:DC:FL:GA:HI:ID:IL:IN:IA:KS:KY:LA:ME:MD:MA:MI:MN:MS:MO:MT:NE:NV:NH:NJ:NM:NY:NC:ND:OH:OK:OR:PA:RI:SC:SD:TN:TX:UT:VT:VA:WA:WV:WI:WY', State )) ),  
NOT(OR(Country = "US", Country = "United States", ISBLANK(Country))))
```

The error message is "The given value is not applicable". The rule was created by "shoaeb_syed" on 6/6/2022, 2:53 AM and modified by the same user on the same date.

resourceful-raccoon-55x1ms-dev-ed.lightning.force.com/lightning/setup/Queues/page?address=%2Fp%2Fown%2FOrgQueuesPage%2Fd%3FretURL... 🔍 ⭐ 🌐 🎉 📈 🎯 🎯 🎯 🎯 🎯 🎯

The page shows the 'Queues' section under 'SETUP'. It displays two queues: 'Assembly_System_Sales' and 'Rainbow_Sales'. Both queues are associated with 'Lead' objects and were created by 'syed_shoeb' on 6/6/2022.

Action	Label ↑	Queue Name	Queue Email	Supported Objects	Modified By	Last Modified Date
Edit Del	Assembly_System_Sales	Assembly_System_Sales		Lead	syed_shoeb	6/6/2022, 3:00 AM
Edit Del	Rainbow_Sales	Rainbow_Sales		Lead	syed_shoeb	6/6/2022, 2:56 AM

Left sidebar navigation includes: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, ADMINISTRATION (with sub-options: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users).

resourceful-raccoon-55x1ms-dev-ed.lightning.force.com/lightning/setup/LeadRules/page?address=%2Fsetup%2Fown%2Fentityruledetail.jsp%3Fid%... 🔍 ⭐ 🌐 🎉 📈 🎯 🎯 🎯 🎯 🎯 🎯

The page shows the 'Lead Assignment Rules' section under 'SETUP'. It displays a single rule named 'Lrule1'. The rule is active and was created by 'shoeb syed' on 6/6/2022 at 3:03 AM.

Rule Name	Created By	Active
Lrule1	shoeb syed, 6/6/2022, 3:03 AM	<input checked="" type="checkbox"/>

The 'Rule Entries' section indicates 'No rule entries specified.' A note below states: 'We recommend you create multiple rule entries under this rule. It is typically not necessary to create more than one rule. However, you may need to create an additional rule if you are importing leads and you choose to route them based on another criteria.'

Left sidebar navigation includes: Feature Settings (Marketing: Lead Assignment Rules, Lead Auto-Response Rules, Lead Processes, Lead Settings), LinkedIn Lead Gen (Lead Gen Fields, LinkedIn Accounts), Web-to-Lead, and Sales (Social Accounts and Contacts Settings). A global search bar at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

The screenshot shows the Salesforce Setup interface. On the left, a sidebar lists various setup categories like Marketing, LinkedIn Lead Gen, Sales, and Web-to-Lead. The main content area is titled "Lead Assignment Rule Lrule1". It displays a table with one rule entry:

Action	Order	Criteria	Assign To	Email
Edit Del	1	Lead: Lead Source EQUALS Web	Rainbow Sales	<input type="checkbox"/>
Edit Del	2	Lead: Lead Source NOT EQUAL TO Web	Assembly System Sales	<input type="checkbox"/>

Below the table, there's a note: "Add rule entries that specify the criteria used to route leads. You can reorder rule entries on this page after you create them."

Challenge 3: Automate accounts (Below the step by step screenshots of what were we supposed to do in this challenge)

The screenshot shows the Salesforce Object Manager. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, and Record Types. The main content area is titled "Account Custom Field Number of deals". It shows the "Custom Field Definition Detail" for the "Number of deals" field. The "Field Information" section includes:

- Field Label: Number of deals
- Field Name: Number_of_deals
- API Name: Number_of_deals_c
- Description: Help Text
- Data Owner: (not specified)
- Field Usage: (not specified)
- Data Sensitivity Level: (not specified)
- Compliance Categorization: (not specified)
- Created By: shoaebsyed, 6/6/2022, 3:31 AM
- Modified By: shoaebsyed, 6/6/2022, 3:31 AM

The "Roll-Up Summary Options" section shows:

- Data Type: Roll-Up Summary
- Summarized Object: Opportunity
- Filter Criteria: (not specified)
- Summary Type: COUNT

Setup Home Object Manager

SETUP > OBJECT MANAGER Account

Account Custom Field Number of won deals

Help for this Page ?

Back to Account Fields

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Number of won deals	Object Name	Account
Field Name	Number_of_won_deals		
API Name	Number_of_won_deals_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	shoaeb syed, 6/6/2022, 3:34 AM	Modified By	shoaeb syed, 6/6/2022, 3:34 AM

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	COUNT
Summarized Object	Opportunity		
Filter Criteria	Stage EQUALS Closed Won		

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- Search Layouts for Salesforce Classic
- Hierarchy Columns

Setup Home Object Manager

SETUP > OBJECT MANAGER Account

Account Custom Field Last won deal date

Help for this Page ?

Back to Account Fields

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Last won deal date	Object Name	Account
Field Name	Last_won_deal_date		
API Name	Last_won_deal_date_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	shoaeb syed, 6/6/2022, 3:36 AM	Modified By	shoaeb syed, 6/6/2022, 3:36 AM

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	MAX
Summarized Object	Opportunity		
Field to Aggregate	Opportunity: Close Date		
Filter Criteria	Stage EQUALS Closed Won		

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- Search Layouts for Salesforce Classic
- Hierarchy Columns

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- Search Layouts for Salesforce Classic
- Hierarchy Columns

Account Custom Field
Amount of won deals

Back to Account Fields

Custom Field Definition Detail

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Amount of won deals	Object Name	Account
Field Name	Amount_of_won_deals		
API Name	Amount_of_won_deals_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	shoaeb syed, 6/6/2022, 3:39 AM	Modified By	shoaeb syed, 6/6/2022, 3:39 AM

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	SUM
Summarized Object	Opportunity		
Field to Aggregate	Opportunity: Amount		
Filter Criteria	Stage EQUALS Closed Won		

Help for this Page [?](#)

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- Search Layouts for Salesforce Classic
- Hierarchy Columns

Account Custom Field
Deal win percent

Back to Account Fields

Custom Field Definition Detail

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Deal win percent	Object Name	Account
Field Name	Deal_win_percent		
API Name	Deal_win_percent_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	shoaeb syed, 6/6/2022, 3:50 AM	Modified By	shoaeb syed, 6/6/2022, 3:50 AM

Formula Options

Data Type	Formula
Decimal Places	2

Number_of_won_deals_c / Number_of_deals_c

Help for this Page [?](#)



Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Account

Account Custom Field
Call for Service

Back to Account Fields

Help for this Page ?

Fields & Relationships

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- Search Layouts for Salesforce Classic
- Hierarchy Columns

Custom Field Definition Detail

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

	Object Name	Account
Field Label	Call for Service	
Field Name	Call_for_Service	
API Name	Call_for_Service_c	
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	shoaeb_syed, 6/6/2022, 3:56 AM	Modified By shoaeb_syed, 6/6/2022, 3:56 AM

Formula Options

Data Type Formula

```
IF(DATE(YEAR(Last_won_deal_date_c)+2,MONTH(Last_won_deal_date_c),DAY(Last_won_deal_date_c))<=TODAY(),"Yes","No")
```



SETUP

Object Manager

Help for this Page ?

Account Validation Rule

Back to Account Validation Rules

Validation Rule Detail

[Edit](#) [Clone](#)

Rule Name	US_Address	Active
Error Condition Formula	OR(AND(LEN(BillingState) > 2, NOT(CONTAINS("AL:AK:AZ:AR:CA:CO:CT:DE:DC:FL:GA:HI:ID:IL:IN:IA:KS:KY:LA:ME:MD:MA:MI:MN:MS:MO:MT:NE:NV:NH:NJ:NM:NY:NC:ND:OH:OK:OR:PA:RI:SC:SD:TN:TX:UT:VT:VA:WA:WV:WI:WY", BillingState)), AND(LEN(ShippingState) > 2, NOT(CONTAINS("AL:AK:AZ:AR:CA:CO:CT:DE:DC:FL:GA:HI:ID:IL:IN:IA:KS:KY:LA:ME:MD:MA:MI:MN:MS:MO:MT:NE:NV:NH:NJ:NM:NY:NC:ND:OH:OK:OR:PA:RI:SC:SD:TN:TX:UT:VT:VA:WA:WV:WI:WY", ShippingState)), NOT(OR(BillingCountry = "US", BillingCountry = "United States", ISBLANK(BillingCountry))), NOT(OR(ShippingCountry = "US", ShippingCountry = "USA", ShippingCountry = "United States", ISBLANK(ShippingCountry))))	<input checked="" type="checkbox"/>
Error Message	You can not save a new account unless the shipping and billing state fields are valid US state abbreviations, and the country field is either blank or US, USA, or United states.	Error Location Top of Page
Description		
Created By	shoaeb_syed, 6/6/2022, 4:35 AM	Modified By shoaeb_syed, 6/6/2022, 4:35 AM

[Edit](#) [Clone](#)



Account Validation Rule

[Back to Account Validation Rules](#)**Validation Rule Detail**[Edit](#) [Clone](#)Active

Rule Name	Name_Change	Created By	shoaeb syed, 6/6/2022, 4:37 AM
Error Condition Formula	ISCHANGED(Name) && (OR(ISPICKVAL(Type , 'Customer - Direct') ,ISPICKVAL(Type , 'Customer - Channel')))	Error Location	Account Name
Error Message	You can't change the Account name for "Customer-Direct" or "Customer-Channel"		
Description		Modified By	shoaeb syed, 6/6/2022, 4:37 AM

[Edit](#) [Clone](#)

Challenge 4: Create Robot Setup Account (Below the step by step screenshots of what were we supposed to do in this challenge)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Cloud icon, a search bar with 'Search Setup', and various global buttons. The main header displays 'SETUP > OBJECT MANAGER' and the object name 'Robot Setup'. On the left, a sidebar lists various setup categories: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Validation Rules. The main content area is titled 'Details' and contains the following fields:

Description	Enable Reports
API Name	Robot_Setup_c
Custom	<input checked="" type="checkbox"/>
Singular Label	Robot Setup
Plural Label	Robot Setups
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the details panel are 'Edit' and 'Delete' buttons.

Cloud icon

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Robot Setup

Date

Back to Robot Setup Validation Rules [0]

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Date	Object Name	Robot Setup
Field Name	Date	Data Type	Date
API Name	Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By shoaeb syed, 6/6/2022, 5:05 AM Modified By shoaeb syed, 6/6/2022, 5:05 AM

General Options

Required

Default Value

Validation Rules New Validation Rules Help ?

No validation rules defined.

Back To Top Always show me ▾ more records per related list

Cloud icon 33°C Mostly cloudy

Windows taskbar icons

ENG US 17:43 06-06-2022

Cloud icon

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Robot Setup

Notes

Back to Robot Setup Validation Rules [0]

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Notes	Object Name	Robot Setup
Field Name	Notes	Data Type	Text
API Name	Notes__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By shoaeb syed, 6/6/2022, 5:06 AM Modified By shoaeb syed, 6/6/2022, 5:06 AM

General Options

Required

Unique

Case Sensitive

External ID

Default Value

Text Options

Cloud icon

Windows taskbar icons

ENG US 17:43 06-06-2022

Setup Home Object Manager

Robot Setup Custom Field Day of the Week

Custom Field Definition Detail

Field Information		Object Name	
Field Label	Day of the Week	Object Name	
Field Name	Day_of_the_Week	Robot Setup	
API Name	Day_of_the_Week_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	shoaeb syed, 6/6/2022, 5:13 AM	Modified By	shoaeb syed, 6/6/2022, 5:13 AM

Formula Options

Data Type: Formula

```
CASE(WEEKDAY( Date__c ),  
1,"Sunday",  
2,"Monday",  
3,"Tuesday",  
4,"Wednesday",  
5,"Thursday",  
6,"Friday",  
7,"Saturday"  
TEXT(WEEKDAY( Date__c )))
```

Setup Home Object Manager

Robot Setup Custom Field Opportunity

Custom Field Definition Detail

Field Information		Object Name	Data Type
Field Label	Opportunity	Object Name	Robot Setup
Field Name	Opportunity	Data Type	Master-Detail
API Name	Opportunity__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	shoaeb syed, 6/6/2022, 5:48 AM	Modified By	shoaeb syed, 6/6/2022, 5:48 AM

Master-Detail Options

Related To	Opportunity	Child Relationship Name	Robot_Setups
Related List Label	Robot Setups		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	<input type="checkbox"/>		

Lookup Filter

No lookup filters defined.

Challenge 5: Create Sales Process and Validate Opportunities (Below the step by step screenshots of what we were supposed to do in this challenge)

The screenshot shows the Salesforce Setup interface with the following details:

- Object Manager:** Opportunity
- Custom Field Name:** Approved
- Field Label:** Approved
- Field Name:** Approved
- API Name:** Approved_c
- Data Type:** Checkbox
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** shoaebsyed, 6/6/2022, 5:58 AM
- Modified By:** shoaebsyed, 6/6/2022, 5:58 AM
- General Options:** Default Value: Unchecked
- Field Dependencies:** No dependencies defined.

NOTE: Add Awaiting picklist in opportunity object under Stage field

Opportunity Stages Picklist Values								Opportunity Stages Picklist Values Help
Action	Stage Name	API Name	Type	Probability	Forecast Category	Chart Colors	Modified By	
Edit Del Deactivate	Prospecting	Prospecting	Open	10%	Pipeline	Assigned dynamically	shoaebsyed, 6/5/2022, 3:33 AM	
Edit Del Deactivate	Qualification	Qualification	Open	10%	Pipeline	Assigned dynamically	shoaebsyed, 6/5/2022, 3:33 AM	
Edit Del Deactivate	Needs Analysis	Needs Analysis	Open	20%	Pipeline	Assigned dynamically	shoaebsyed, 6/5/2022, 3:33 AM	
Edit Del Deactivate	Value Proposition	Value Proposition	Open	50%	Pipeline	Assigned dynamically	shoaebsyed, 6/5/2022, 3:33 AM	
Edit Del Deactivate	Id. Decision Makers	Id. Decision Makers	Open	60%	Pipeline	Assigned dynamically	shoaebsyed, 6/5/2022, 3:33 AM	
Edit Del Deactivate	Perception Analysis	Perception Analysis	Open	70%	Pipeline	Assigned dynamically	shoaebsyed, 6/5/2022, 3:33 AM	
Edit Del Deactivate	Proposal/Price Quote	Proposal/Price Quote	Open	75%	Pipeline	Assigned dynamically	shoaebsyed, 6/5/2022, 3:33 AM	
Edit Del Deactivate	Negotiation/Review	Negotiation/Review	Open	90%	Pipeline	Assigned dynamically	shoaebsyed, 6/5/2022, 3:33 AM	
Edit Del Deactivate	Closed Won	Closed Won	Closed/Won	100%	Closed	Assigned dynamically	shoaebsyed, 6/5/2022, 3:33 AM	
Edit Del Deactivate	Closed Lost	Closed Lost	Closed/Lost	0%	Omitted	Assigned dynamically	shoaebsyed, 6/5/2022, 3:33 AM	
Edit Del Deactivate	Awaiting Approval	Awaiting Approval	Open	97%	Pipeline	Assigned dynamically	shoaebsyed, 6/6/2022, 6:02 AM	

Cloud icon

Search Setup

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Apps
- > Feature Settings
 - > Analytics
 - > Chatter

SETUP Sales Processes

Sales Process RB Robotics Sales Process Help for this Page

Opportunity Stages

Sales Process RB Robotics Sales Process

Namespace Prefix

Description

Available Values

- Needs Analysis (Open, 20%, Pipeline)
- Value Proposition (Open, 50%, Pipeline)
- Id. Decision Makers (Open, 60%, Pipeline)
- Perception Analysis (Open, 70%, Pipeline)

Add Remove

Selected Values

- Prospecting (Open, 10%, Pipeline)
- Qualification (Open, 10%, Pipeline)
- Proposal/Price Quote (Open, 75%, Pipeline)
- Negotiation/Review (Open, 90%, Pipeline)
- Closed Won (Closed/Won, 100%, Closed)
- Closed Lost (Closed/Lost, 0%, Omitted)
- Awaiting Approval (Open, 97%, Pipeline)

Save Cancel

Cloud icon

Search Setup

Setup Home

Object Manager

SETUP Object Manager

Opportunity Validation Rule Help for this Page

Back to Opportunity Validation Rules

Validation Rule Detail

Edit Clone

Rule Name	RB_High_Value_Opp	Active	<input checked="" type="checkbox"/>
Error Condition Formula	IF((Amount > 100000 && Approved__c <> True && ISPICKVAL(StageName,'Closed Won')),True,False)		
Error Message	Appropriate value should be given	Error Location	Top of Page
Description			
Created By	shoaeb.syed, 6/6/2022, 6:14 AM	Modified By	shoaeb.syed, 6/6/2022, 6:14 AM

Edit Clone

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Opportunity

Record Type
RB Robotics Process RT

Help for this Page ?

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Search Layouts for Salesforce Classic
Scoping Rules

Record Type Label: RB Robotics Process RT
Sales Process: RB Robotics Sales Process
Record Type Name: RB_Robotics_Process_RT
Namespace Prefix:
Description: shoaebsyed, 6/6/2022, 6:16 AM
Created By: shoaebsyed, 6/6/2022, 6:16 AM
Modified By: shoaebsyed, 6/6/2022, 6:16 AM

Picklists Available for Editing

Action	Field	Modified Date
Edit	Delivery/Installation Status	6/6/2022, 6:16 AM
Edit	Lead Source	6/6/2022, 6:16 AM
Edit	Type	6/6/2022, 6:16 AM

Picklists Available for Editing Help ?

35°C Cloudy ENG IN 18:47 06-06-2022 3

Challenge 6: Automate Opportunities (Below the step by step screenshots of what were we supposed to do in this challenge)

Cloud

Setup | Home | Object Manager

Search Setup

Setup | Home | Object Manager

email

Email
Apex Exception Email
Classic Email Templates
Classic Letterheads
Compliance BCC Email
DKIM Keys
Deliverability
Email Address
Internationalization
Email Attachments
Email Delivery Settings
Email Domain Filters
Email Relays
Email Footers
Email to Salesforce
Enhanced Email
Filter Email Tracking
Gmail Integration and Sync
Lightning Email Templates

SETUP
Classic Email Templates

Text Email Template
Sales:Opportunity Approval Status

Help for this Page ?

Email Template Detail

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use
Email Template Name: Sales:Opportunity Approval Status		<input type="checkbox"/>
Template Unique Name: Sales_Opportunity_Approval_Status	Last Used Date	
Encoding: Unicode (UTF-8)	Times Used	
Author: shoaebsyed [Change]		
Description:		
Created By: shoaebsyed, 6/6/2022, 6:24 AM	Modified By: shoaebsyed, 6/6/2022, 6:24 AM	

Email Template

Send Test and Verify Merge Fields

Subject: Approved

Plain Text Preview

Setup Home Object Manager

Search Setup

Classic Email Templates

SALES:Opportunity Needs Approval

Email Template Detail

Email Templates from Salesforce	Unfiled Public Classic Email Templates
Email Template Name	SALES:Opportunity Needs Approval
Template Unique Name	SALES_Opportunity_Needs_Approval
Encoding	Unicode (UTF-8)
Author	shoaeb syed [Change]
Description	
Created By	shoaeb syed, 6/6/2022, 6:40 AM
Modified By	shoaeb syed, 6/6/2022, 6:40 AM

Available For Use

Last Used Date

Times Used

Email Template

Send Test and Verify Merge Fields

Subject | Approved

Plain Text Preview

Search Setup

Help for this Page

Apex Exception Email

Classic Email Templates

Classic Letterheads

Compliance BCC Email

DKIM Keys

Deliverability

Email Address Internationalization

Email Attachments

Email Delivery Settings

Email Domain Filters

Email Relays

Email Footers

Email to Salesforce

Enhanced Email

Filter Email Tracking

Gmail Integration and Sync

Lightning Email Templates

Setup Home Object Manager

Search Setup

Classic Email Templates

Finance:Account Creation

Email Template Detail

Email Templates from Salesforce	Unfiled Public Classic Email Templates
Email Template Name	Finance:Account Creation
Template Unique Name	Account_Creation_Finance
Encoding	Unicode (UTF-8)
Author	shoaeb syed [Change]
Description	
Created By	shoaeb syed, 6/6/2022, 6:43 AM
Modified By	shoaeb syed, 6/6/2022, 6:43 AM

Available For Use

Last Used Date

Times Used

Email Template

Send Test and Verify Merge Fields

Subject | Approved

Plain Text Preview

Search Setup

Help for this Page

Apex Exception Email

Classic Email Templates

Classic Letterheads

Compliance BCC Email

DKIM Keys

Deliverability

Email Address Internationalization

Email Attachments

Email Delivery Settings

Email Domain Filters

Email Relays

Email Footers

Email to Salesforce

Enhanced Email

Filter Email Tracking

Gmail Integration and Sync

Lightning Email Templates

Cloud icon

Search Setup

Setup Home Object Manager

email alert

Process Automation Workflow Actions Email Alerts

Email Alert in Opportunity

Help for this Page

Email Alert Detail

Description	Email Alert in Opportunity	Edit	Delete	Clone
Unique Name	Email_Alert_in_Opportunity	Email Template Finance: Account Creation		
From Email Address	Current User's email address	Object Opportunity		
Recipients	User: shoaebsyed User: Nushi Davoud User: Integration User			
Additional Emails				
Created By	shoaebsyed, 6/6/2022, 6:54 AM	Modified By shoaebsyed, 6/6/2022, 6:55 AM		
Edit Delete Clone				

Rules Using This Email Alert

This alert is currently not used by any rules

Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Cloud icon

SETUP Email Alerts

Help for this Page

Email Alert Sales Approval Email

Rules Using This Email Alert | Approval Processes Using This Email Alert | Entitlement Processes Using This Email Alert

Email Alert Detail

Description	Sales Approval Email	Edit	Delete	Clone
Unique Name	Sales_Approval_Email	Email Template SALES:Opportunity Needs Approval		
From Email Address	Current User's email address	Object Opportunity		
Recipients	User: shoaebsyed User: Nushi Davoud			
Additional Emails				
Created By	shoaebsyed, 6/6/2022, 6:59 AM	Modified By shoaebsyed, 6/6/2022, 6:59 AM		
Edit Delete Clone				

Rules Using This Email Alert

This alert is currently not used by any rules

Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

SETUP

Email Alerts

Email Alert
Sales:Opportunity Approval Request Mail

[Rules Using This Email Alert \[0\]](#) | [Approval Processes Using This Email Alert \[0\]](#) | [Entitlement Processes Using This Email Alert \[0\]](#)

Email Alert Detail

		Edit	Delete	Clone
Description	Sales:Opportunity Approval Request Mail	Email Template	Sales:Opportunity Approval Status	
Unique Name	Sales_Opportunity_Approval_Request_Mail	Object	Opportunity	
From Email Address	Current User's email address			
Recipients	User: shoaebsyed User: Nushi Davoud			
Additional Emails				
Created By	shoaebsyed, 6/6/2022, 6:57 AM	Modified By	shoaebsyed, 6/6/2022, 6:57 AM	
		Edit	Delete	Clone

Rules Using This Email Alert

This alert is currently not used by any rules

Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Setup [Home](#) [Object Manager](#) ▾

[User Profile](#) [Help for this Page](#)

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users

Didn't find what you're looking for?
Try using Global Search.

User
Nushi Davoud

[User Profile](#) [Help for this Page](#)

[Permission Set Assignments \[0\]](#) | [Permission Set Assignments: Activation Required \[0\]](#) | [Permission Set Group Assignments \[0\]](#) | [Permission Set License Assignments \[0\]](#) | [Personal Groups \[0\]](#) | [Public Group Membership \[0\]](#) | [Queue Membership \[0\]](#) | [Team \[0\]](#) | [Managers in the Role Hierarchy \[0\]](#) | [OAuth Connected Apps \[0\]](#) | [Third-Party Account Links \[0\]](#) | [Installed Mobile Apps \[0\]](#) | [Authentication Settings for External Systems \[0\]](#) | [Login History \[0+\]](#) | [User Provisioning Accounts \[0\]](#)

User Detail

		Edit	Sharing	Reset Password	Freeze
Name	Nushi Davoud	Role			
Alias	ndavo	User License	Salesforce		
Email	xxxxnnnn@xxx.com	Profile	Contract Manager		
Username	xxxxnnnn@xxx.com	Active	<input checked="" type="checkbox"/>		
Nickname	User1654523381743291896	Marketing User	<input type="checkbox"/>		
Title		Offline User	<input type="checkbox"/>		
Company		Knowledge User	<input type="checkbox"/>		
Department		Flow User	<input type="checkbox"/>		
Division		Service Cloud User	<input type="checkbox"/>		
Address		Site.com Contributor User	<input type="checkbox"/>		
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>		
Locale	English (United States)	WDC User	<input type="checkbox"/>		
Language	English	Mobile Push Registrations	View		
Delegated Approver		Data.com User Type	i		
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i		
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i		
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i		
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i		



SETUP

Approval Processes

Approval Processes Opportunity: Prospect Approval

Help for this Page

« Back to Approval Process List

Process Definition Detail

[Edit](#) [Clone](#) [Delete](#) [Activate](#)

Process Name	Prospect Approval	Active	<input type="checkbox"/>		
Unique Name	Prospect_Approval	Next Automated Approver Determined By	Manager of Record Submitter		
Description					
Entry Criteria	(Opportunity: Amount GREATER THAN 100000) AND (Opportunity: Stage EQUALS Negotiation/Review)				
Record Editability Administrator ONLY					
Allow Submitters to Recall Approval Requests	<input type="checkbox"/>				
Approval Assignment Email Template	SALES: Opportunity Needs Approval				
Initial Submitters	Opportunity Owner, User: Nushi Davoud				
Created By	shoaeb syed, 6/6/2022, 7:20 AM	Modified By	shoaeb syed, 6/6/2022, 7:43 AM		



SETUP

Field Updates

Field Update Approval

Help for this Page

Field Update Detail

[Edit](#) [Delete](#)

Name	Approval
Unique Name	Approval
Description	
Object	Opportunity
Field to Update	Opportunity: Stage
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>
New Field Value	Awaiting Approval

[Edit](#) [Delete](#)

Rules Using This Field Update

Rules Using This Field Update Help

This field update is currently not used by any rules

Approval Processes Using This Field Update

Approval Processes Using This Field Update Help

Action	Approval Process Name	Description	Type	State
Edit Del	Prospect Approval		Opportunity	Inactive

Setup Home Object Manager ▾

Q approval

Approval Processes

Opportunity: Prospect Approval

Process Definition Detail

Process Name	Prospect Approval	Active
Unique Name	Prospect_Approval	Next Automated Approver Determined By
Description		Manager of Record Submitter
Entry Criteria	(Opportunity: Amount GREATER THAN 100000) AND (Opportunity: Stage EQUALS Negotiation/Review)	
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests
Approval Assignment Email Template	SALES_Opportunity_Needs_Approval	
Initial Submitters	Opportunity Owner, User Nushi Davoud	Created By
	shoab_sayed	Created On
	06/06/2022, 7:20 AM	Modified By
	shoab_sayed	Modified On
	06/06/2022, 7:46 AM	

Initial Submission Actions

Action	Type	Description
Record Lock		Lock the record from being edited
Edit Remove	Field Update	Approval

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions	1	Approval for Prospect			User:Nushi Davoud	Final Rejection

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Stage-Closed Won
Edit Remove	Email Alert	Sales_Opportunity_Approval_Request_Mail
Edit Remove	Field Update	Approved Check

Final Rejection Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Field Update	State Neg
Edit Remove	Email Alert	Sales_Approval_Email

Recall Actions

Action	Type	Description
Add Existing		
Add New		

Choose Object and Specify When to Start the Process

Object * ?

Opportunity

Start the process *

only when a record is created

- when a record is created or edited

> Advanced

Save

Cancel

Define Criteria for this Action Group

Criteria Name * 

Customer

Criteria for Executing Actions *

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Set Conditions

Field *	Operator *	Type *	Value *
1 [Opportunity].A...	Equals	Picklist	Customer - Direct
2 [Opportunity].A...	Equals	Picklist	Customer - Channel
3 [Opportunity].A...	Does not equal	Global Constant	\$GlobalConstant.Nu

Conditions *

- All of the conditions are met (AND)
- Any of the conditions are met (OR)
- Customize the logic

Logic * 

(1 OR 2) AND 3

 Advanced

Email Alerts



Action Name * 

Alert to Finance

Email Alert *

Email_Alert_in_Opportunity

Specify What Happens After Evaluating This Criteria



When this criteria is true and the process executes the associated action group, what should happen next?*

- Stop the process
- Evaluate the next criteria

Define Criteria for this Action Group

Criteria Name *

Prospect Account

Criteria for Executing Actions *

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *
1	[Opportunity].A...	Equals	Picklist	Prospect
2	[Opportunity].A...	Does not equal	Global Constant	\$GlobalConstant.Nu
3	[Opportunity].St...	Equals	Picklist	Prospecting

Create a Record

Send Marketing Materials

Record Type *

Task

Set Field Values

Field *	Type *	Value *
Assigned To ID	Field Reference ▾	[Opportunity].Account.... 
Priority	Picklist ▾	High 
Status	Picklist ▾	In Progress 
Due Date Only	Formula ▾	TODAY() +7
Subject	String ▾	Send Marketing Materials
Related To ID	Field Reference ▾	[Opportunity].Id 

Email Alerts

Action Name * 

Alert

Email Alert *

Email_Alert_in_Opportunity

Save

Cancel

Specify What Happens After Evaluating This Criteria



When this criteria is true and the process executes the associated action group, what should happen next?*

- Stop the process
- Evaluate the next criteria

Define Criteria for this Action Group

Criteria Name *

Negotiation or Review

Criteria for Executing Actions*

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Set Conditions

Field *	Operator *	Type *	Value *
1 [Opportunity].St...	Equals	Picklist	Negotiation/Review
2 [Opportunity].A...	Greater than	Currency	\$100,000

Conditions*

Submit for Approval



Action Name*

Approval Pro

Object*

Opportunity

Approval Process*

Specific approval process

Prospect Approval - Prospect_App...

Skip the entry criteria for this process?

Yes

Submitter*

Current User

Specify What Happens After Evaluating This Criteria



When this criteria is true and the process executes the associated action group, what should happen next?*

- Stop the process
- Evaluate the next criteria

Define Criteria for this Action Group



Criteria Name * !

Closed Won Deal

Criteria for Executing Actions *

Conditions are met

Formula evaluates to true

- No criteria—just execute the actions!

Create a Record



Action Name * !

Record for robot

Record Type *

Robot Setup

Set Field Values

Field *	Type *	Value *
Opportunity	Field Reference ▾	[Opportunity].Id 🔍
Date	Formula ▾	[Opportunity].CloseDate +180

Email Alerts



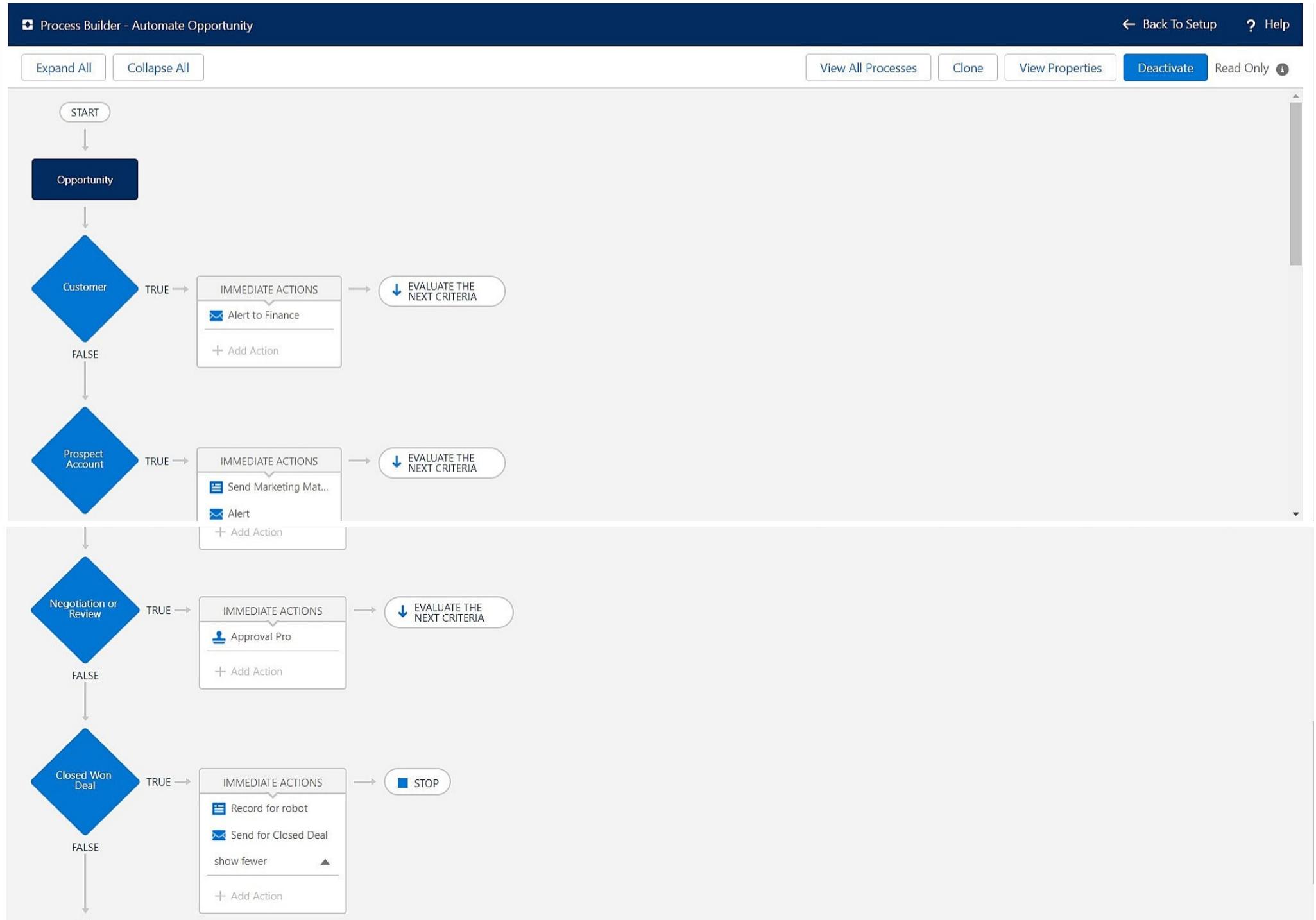
Action Name* ⓘ

Send for Closed Deal

Email Alert*

Email_Alert_in_Opportunity

THE FINAL PROCESS BUILDER IS GIVEN BELOW:



Challenge 7: Create Flow for Opportunities (Below the step by step screenshots of what we were supposed to do in this challenge)

Edit Screen

Components Fields (Beta)

Search components...

Input (24)

- Address
- Call Script
- Checkbox
- Checkbox Group
- Currency
- Date
- Date & Time
- Dependent Picklists
- Display Image

Get more on the AppExchange

Product Quick Search

Product Type

- RainbowBot
- CloudyBot
- Assembly System

Pause **Previous** **Finish**

Screen Properties

* Label: Product Quick Search

* API Name: Product_Quick_Search

Description:

> Configure Header

> Configure Footer

Cancel **Done**

Edit Screen

Components Fields (Beta)

Search components...

Input (24)

- Address
- Call Script
- Checkbox
- Checkbox Group
- Currency
- Date
- Date & Time
- Dependent Picklists
- Display Image

Get more on the AppExchange

Product Quick Search

Radio Buttons

Product Type

- RainbowBot
- CloudyBot
- Assembly System

Pause **Previous** **Finish**

← Radio Buttons

Component Type: Radio Buttons

* Choice: {!RainbowBot}

* Choice: {!CloudyBot}

* Choice: {!AssemblySystem}

+ Add Choice

Default Value: Enter value or search resources...

Cancel **Done**

Edit Get Records

Find Salesforce records and store their field values in flow variables.

Product (Product)

Get Records of This Object

* Object

Product

Filter Product Records

Condition Requirements

All Conditions Are Met (AND)

Field

Name

Operator

Contains

Value

A_a Product_Type 

 Add Condition

Sort Product Records

Sort Order

Not Sorted

If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

- Only the first record
- All records

How to Store Record Data

- Automatically store all fields
- Choose fields and let Salesforce do the rest
- Choose fields and assign variables (advanced)

To use the returned **Product** records in the flow, store their fields in variables.

Select Variable to Store Product Records

* Record Collection

 FilterResult1 

Select Product Fields to Store in Variable

Field

ID

Field

Name



 Add Field

When no records are returned, set specified variables to null.

Cancel

Done

Edit Screen

Components Fields (Beta)

Search components...

Input (24)

- Address
- Call Script
- Checkbox
- Checkbox Group
- Currency
- Date
- Date & Time
- Dependent Picklists
- Display Image

Get more on the AppExchange

Product Quick Search

{!FilterResult1}

Pause Previous Finish

Screen Properties

*Label Final Screen

*API Name Final_Screen

Description

> Configure Header

> Configure Footer

Cancel Done

Edit Screen

Components Fields (Beta)

Search components...

Input (24)

- Address
- Call Script
- Checkbox
- Checkbox Group
- Currency
- Date
- Date & Time
- Dependent Picklists
- Display Image

Get more on the AppExchange

Product Quick Search

Display Text +

{!FilterResult1}

Pause Previous Finish

← Display Text

*API Name Display

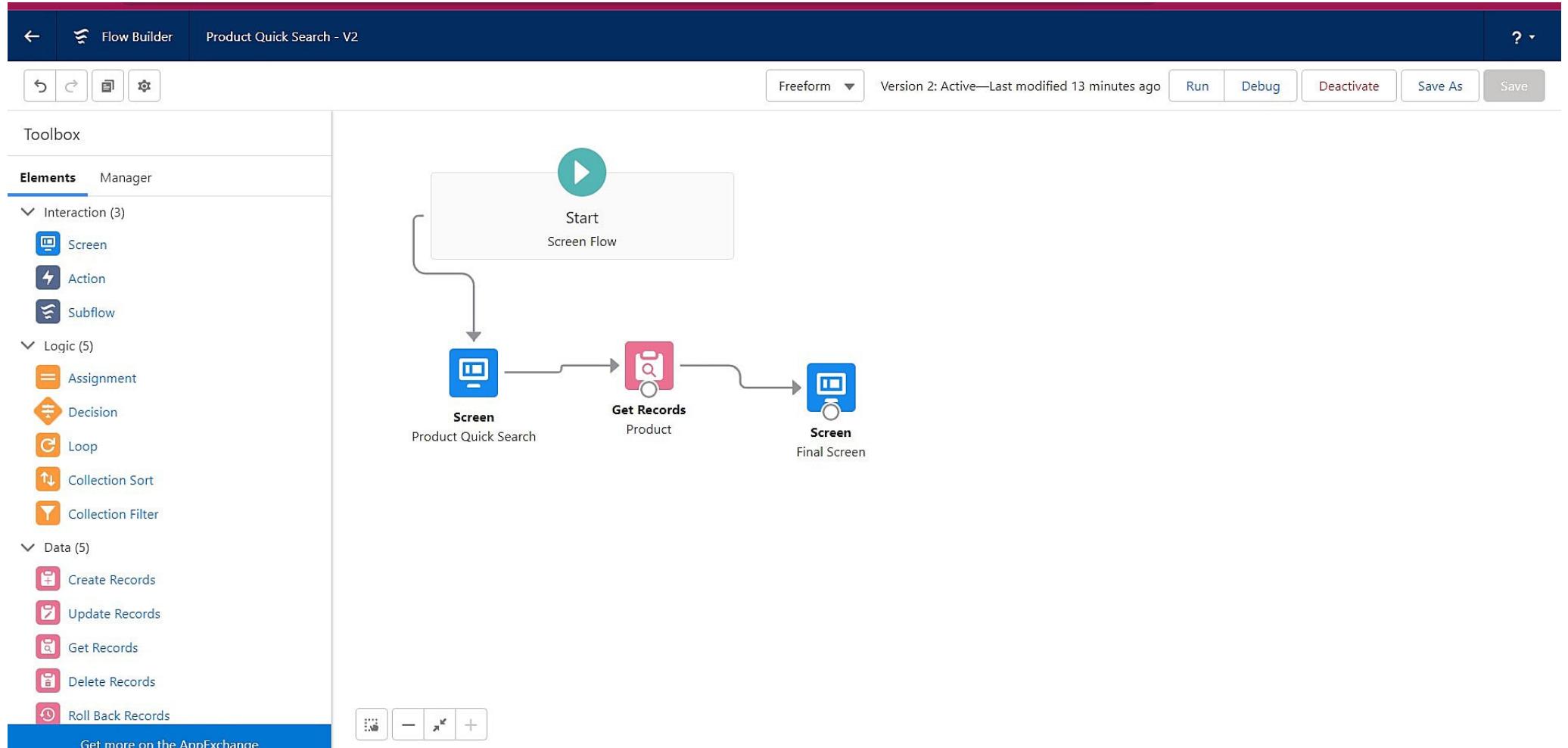
Insert a resource...

{!FilterResult1}

Salesforce Sans 12

Cancel Done

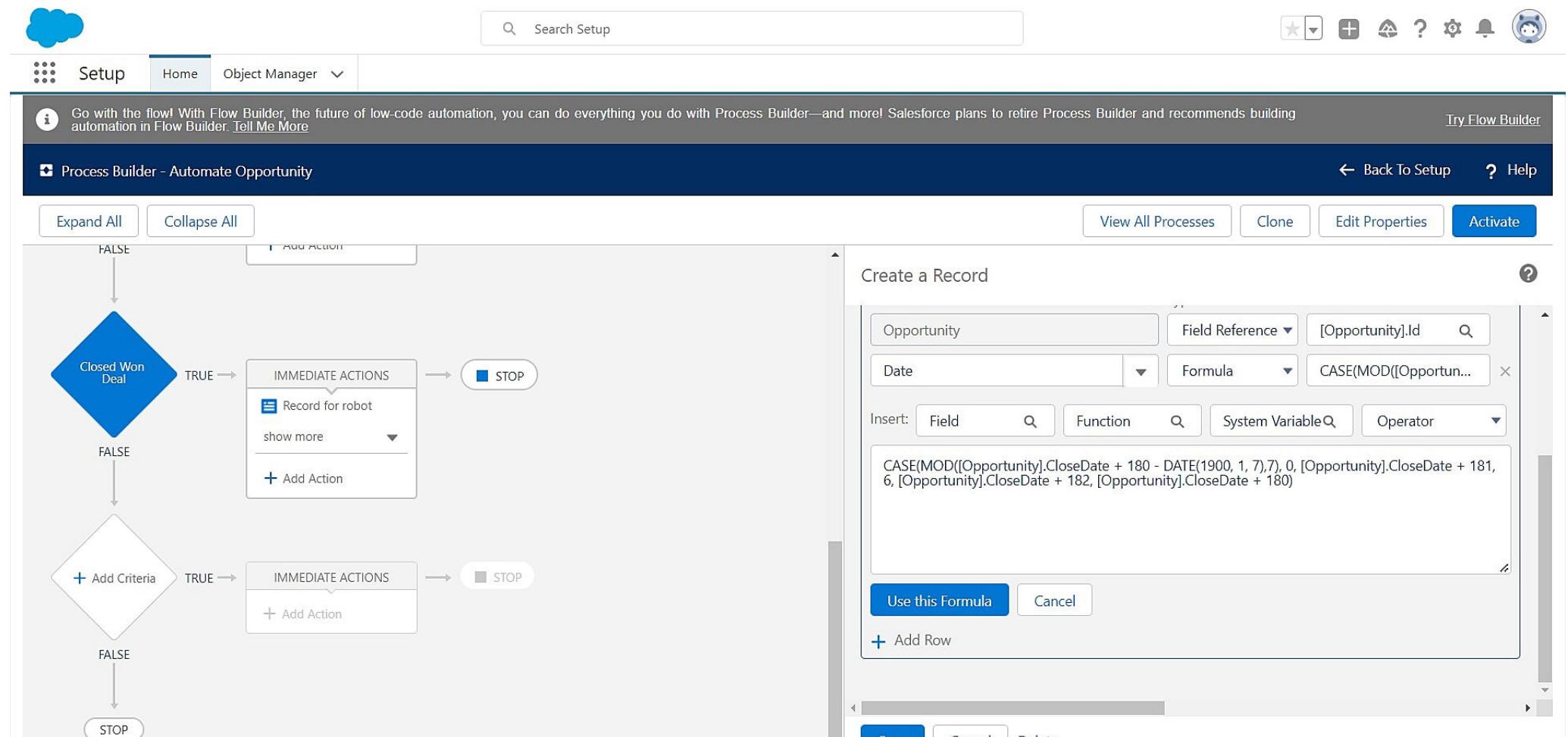
THIS IS THE FINAL FLOW OUTPUT:



The screenshot shows the Lightning App Builder interface with the following details:

- Header:** Shows "Lightning App Builder" and "Product_Quick_Search".
- Toolbar:** Includes icons for Back, Forward, Save, and Help.
- Components:** Shows a list of components including Accordion, Actions & Recommendations, Activities, Chatter, Chatter Feed, Chatter Publisher, Company Hierarchy, Data.com Insights, Einstein Next Best Action, Event Insights, Flow, Highlights Panel, Launchpad, List View, Orchestrator Work Guide, Path, and Quip Associated Documents.
- Page Content:** Displays a "Flow Component: Product Quick Search" placeholder. The placeholder text says: "This is a placeholder. Flows don't run in the canvas."
- Right Sidebar:**
 - Page > Flow:** Notes that flows don't run in the canvas so they don't accidentally do something in your org, like create or delete records.
 - * Flow:** Set to "Product Quick Search".
 - Edit Flow in Flow Builder:** A button to edit the flow.
 - Layout:** Set to "One Column".
 - Set Component Visibility:** A collapsed section.
 - Filters:** A section with a "+ Add Filter" button.
- Bottom Bar:** Includes links to "Get more on the AppExchange" and various page controls.

Challenge 8: Automate Steps (Below the step by step screenshots of what we were supposed to do in this challenge)



SUCCESSFUL COMPLETION OF MY SUPERBADGE:

