

PROCESS AUTOMATION SPECIALIST

1. Automate Leads

Validation Rule

- Check the function for Length.
- Remember to check the NULL Values in Validation rule.

Error Condition 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:P  
A:RI:SC:SD:TN:TX:UT:VT:VA:WA:WV:WI:WY", State )) ), NOT(OR(Country  
="US",Country ="USA",Country ="United States", ISBLANK(Country))))
```

Queue Creation

- This is straightforward normal Queue creation
- Create Names with related to appropriate sales team.

Assignment Rule

- Create new Assignment rule for this scenario(Do not use the standard rule).
- Make sure that you rule is Active before you validate this step.

 **SETUP**
Lead Assignment Rules

Lead Assignment Rule

Trailhead

Add rule entries that specify the criteria used to route leads. You can reorder rule entries on this page after you create them.

Rule Detail

Edit

Rule Name	Trailhead	Active	✓
Created By	Tanushree HR, 5/31/2022, 7:41 AM	Modified By	Tanushree HR, 5/31/2022, 7:47 AM

Edit

Rule Entries

New Reorder

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

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2. Automate Accounts

- **Number of deals** Field should be a Roll-Up Summary take count of COUNT Opportunities
- **Number of won deals** Field should be a Roll-Up Summary (COUNT Opportunity) with filter criteria of Closed Won
- **Amount of won deals** Field should be a Roll-Up Summary (SUM Opportunity) with filter criteria of Closed Won
- **Last won deal date** Field should be a Roll-Up Summary (MAX Opportunity)
- **Deal win percent** Field should be a Formula(Percentage field) IF Number_of_deals__c greater than 0 the , Number_of_won_deals__c /Number_of_deals__c otherwise Zero
- **Call for Service** Field should be a Formula (Date) *IF(OR(TODAY() - 730 > Last_won_deal_date__c , TODAY() + 730 < Last_won_deal_date__c), 'Yes','No')*

Validation Rules on Account Object

- For Customer – Channel

ISCHANGED(Name) && ISPICKVAL(Type, "Customer – Channel")
- For Customer – Direct

ISCHANGED(Name) && ISPICKVAL(Type, "Customer – Direct")
- For Billing State/Province

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:" &

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"NJ:NM:NY:NC:ND:OH:OK:OR:PA:RI:SC:SD:TN:TX:UT:VT:VA:" &

"WA:WV:WI:WY", BillingState))

- For Billing Country

BillingCountry <> "US" && BillingCountry <> "USA" && BillingCountry <> "United States" && NOT(ISBLANK(BillingCountry))

- For Shipping State/Province and Shipping Country

3. Create Robot Setup Object

It can be done easily:

- Create a object and make sure the object name should be ***Robot_Setup__c***
- Edit the Robot name(Standard field) switch the data type from Text to AutoNumber and make sure the display format should be ***ROBOT SETUP-{0000}***
- Create following fields with correct data type:

Date----->Date__c----->DATE

Notes-----> Notes__c----->TEXT

Day of the Week-->Day_of_the_Week__c--->TEXT

4. Create Sales Process and Validation Oppurtunities

- Create Sales Process in Opportunity; the name should be ***RB Robotics Sales Process***.
- Create a record type; the name should be ***RB Robotics Process RT***.

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- Add **Awaiting Approval** value in opportunity Stage don't forget to add RB Robotics Process RT record type.
- Create a Checkbox field and Name it **Approved**.
- Write a validation rule as below:

IF((Amount > 100000 && Approved__c <> True && ISPICKVAL(StageName,'Closed Won')),True,False)

5. Automate Opportunities


Create Three Email Templates:

Finance: Account Creation,

Sales: Opportunity Needs Approval,

Sales: Opportunity Approval Status.

Create Approval Process

 **SETUP**
Approval Processes

Approval Processes

Opportunity: prospect

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Help for this Page

Process Definition Detail

Edit Clone Deactivate

Process Name	prospect	Active	✓
Unique Name	prospect	Next Automated Approver Determined By	Manager of Record Owner
Description			
Entry Criteria	(Opportunity: Stage EQUALS Negotiation/Review) AND (Opportunity: Amount GREATER THAN 100000)		
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		
Created By	Tanushree HR 6/3/2022, 9:34 AM	Modified By	Tanushree HR 6/3/2022, 11:09 AM

Initial Submission Actions

Add Existing Add New

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

Show Actions Edit

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
	1	Step 1			User Nushi Davoud	Final Rejection

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Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps 1

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

Final Approval Actions 1

Add Existing Add New

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

Final Rejection Actions 1

Add Existing Add New

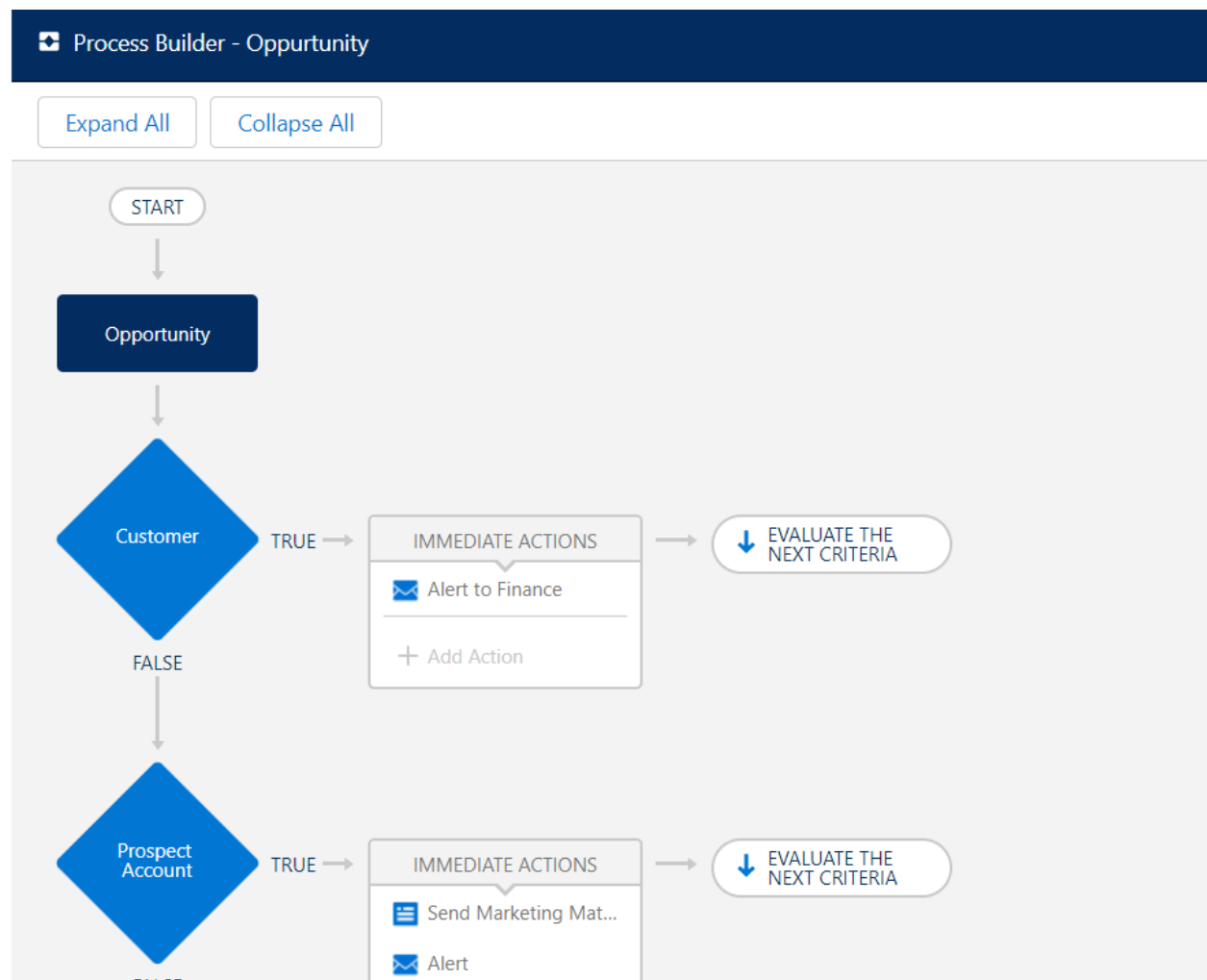
Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Field Update	negotiation

Recall Actions 1

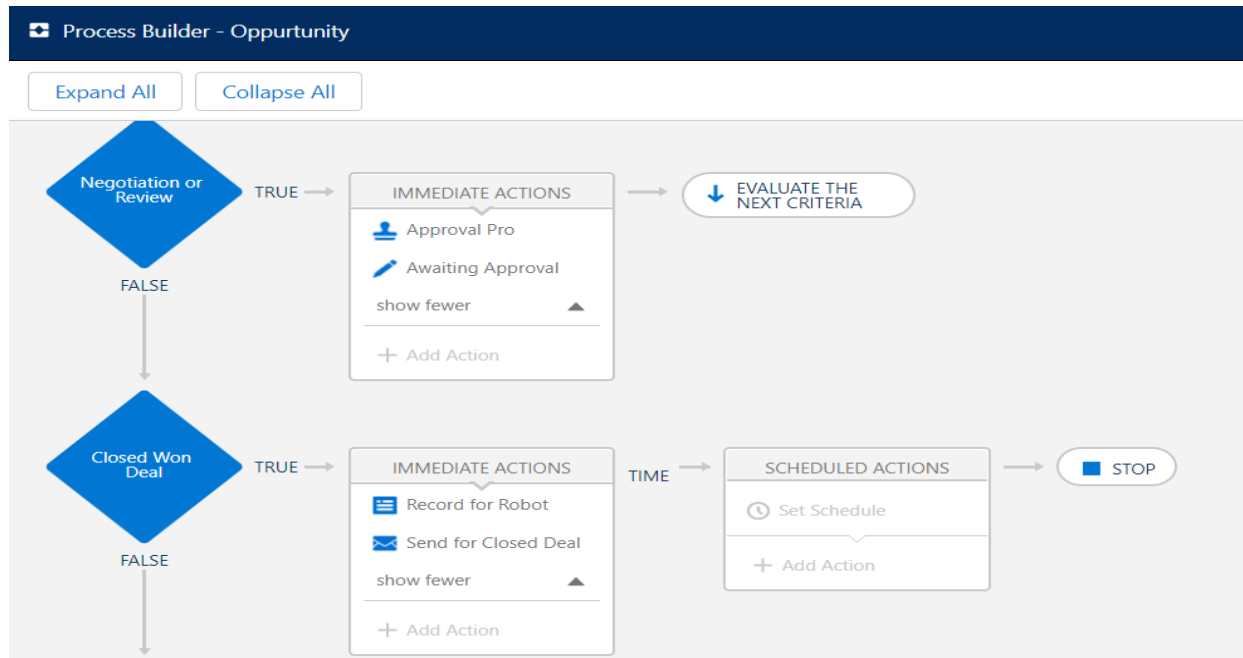
Add Existing Add New

Action	Type	Description
	Record Lock	Unlock the record for editing

Create a process with the process Builder



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6. Flow For Opportunity

