PROCESS AUTOMATION SPECIALIST

1. Automate Leads

Validation Rule

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

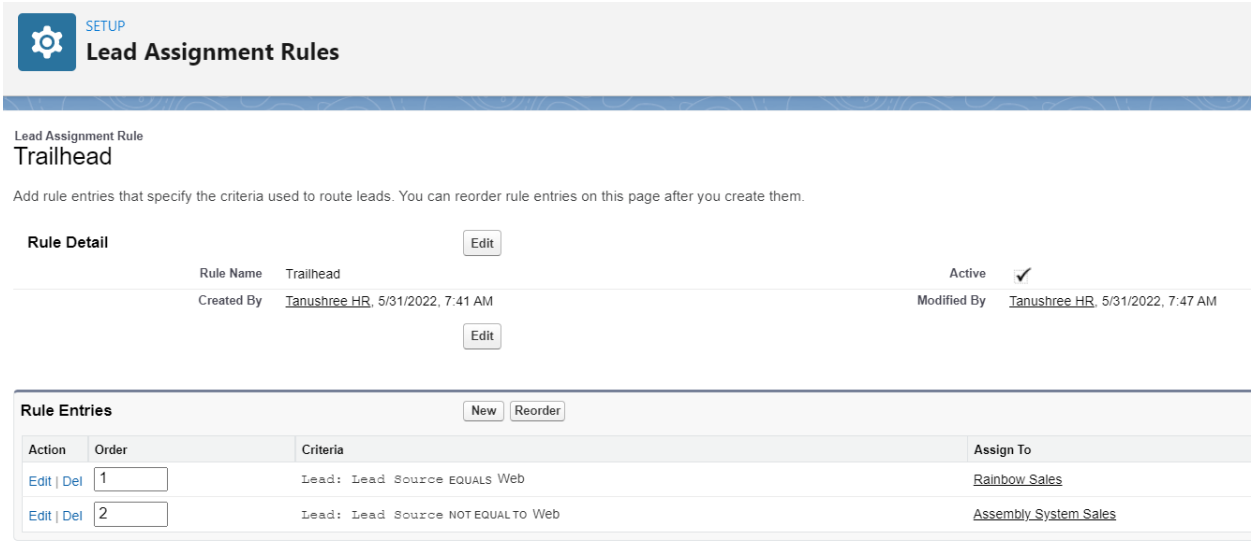
Error Condition Formula:
OR(AND(LEN(State) > 2,
NOT(CONTAINS("AL:AK:AZ:AR:CA:CO:CT:DE:DC:FL:GA:HI:ID:IL:IN:IA:KS:KY:LA:ME:MD:MA:MI:MN:MS:MO:MT:NE:NV:NH:NJ:NM:NY:NC:ND:OH:OK:OR:PA:RI:SC:SD:TN:TX:UT:VT:VA:WA:WV:WI:WY", State))), NOT(OR(Country ="US",Country ="USA",Country ="United States", ISBLANK(Country))))

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.



PROCESS AUTOMATION SPECIALIST

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:" &

PROCESS AUTOMATION SPECIALIST

“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***.

PROCESS AUTOMATION SPECIALIST

- 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 Oppurtunities

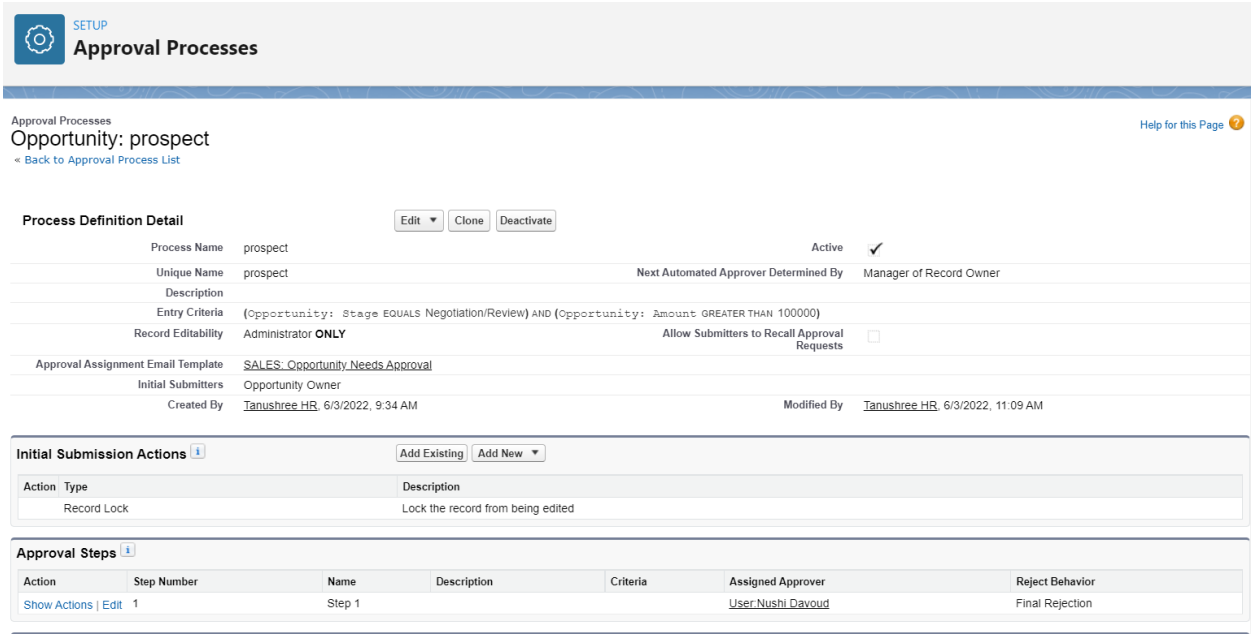
Create Three Email Templates:

Finance: Account Creation,

Sales: Oppurtunity Needs Approval,

Sales: Oppurtunity Approval Status.

Create Approval Process



PROCESS AUTOMATION SPECIALIST

Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps

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

Final Approval Actions Add Existing | Add New

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

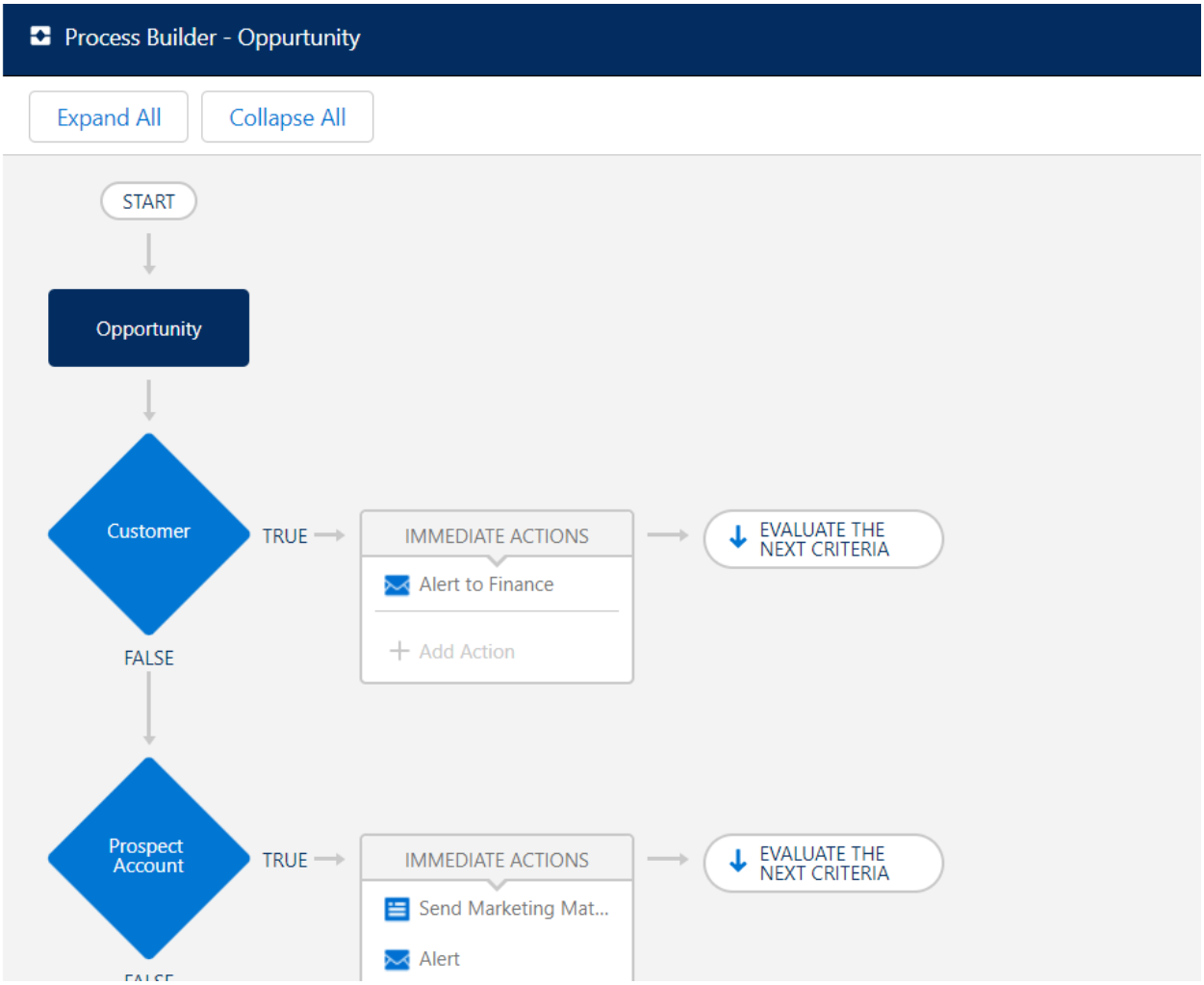
Final Rejection Actions Add Existing | Add New

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

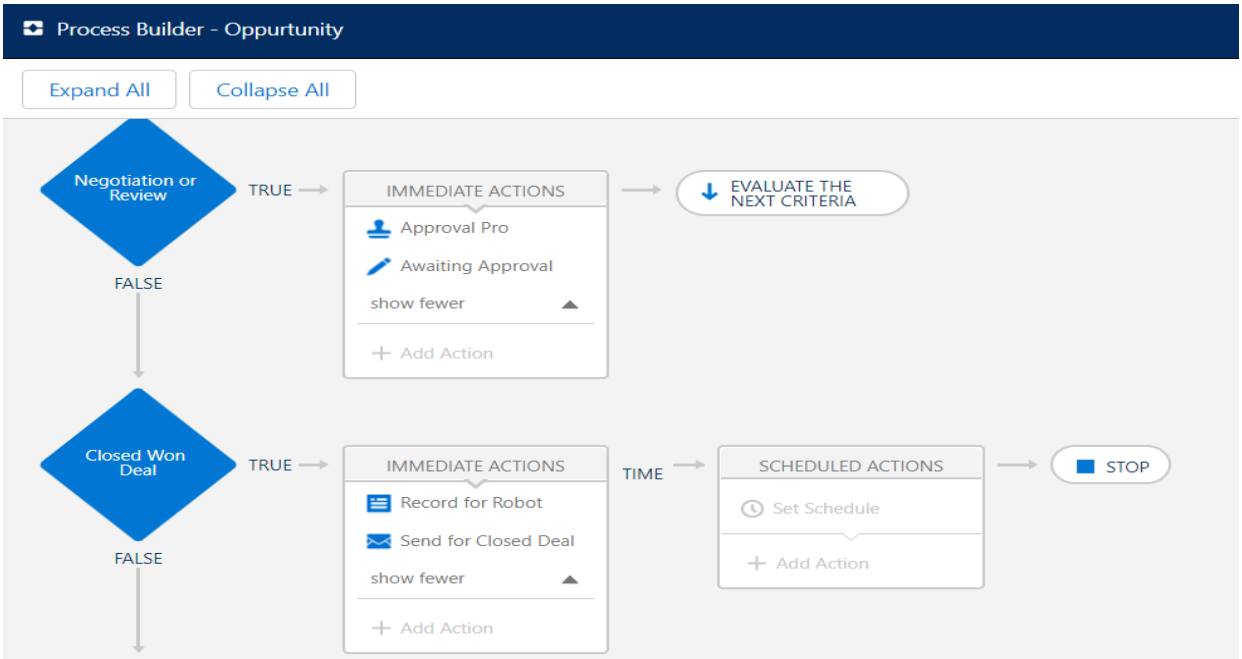
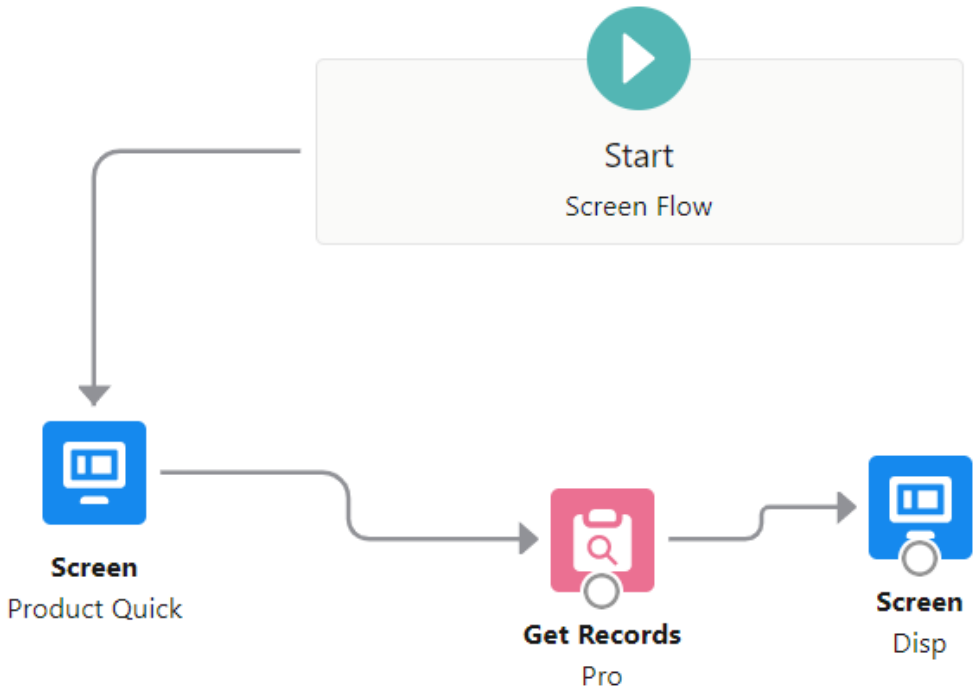
Recall Actions Add Existing | Add New

Action	Type	Description
	Record Lock	Unlock the record for editing

Create a process with the process Builder



PROCESS AUTOMATION SPECIALIST



6. Flow For Oppurtunity