

## Process Automation Superbadge

### Step-2: Automate Leads

We create a validation rule on the 'Leads' object to check whether the lead has a standard 2-character US state abbreviation in the State/Province field. Also we make sure that the lead has either US,USA,United States, or nothing in the country field. We create a validation rule such that an error message is displayed if the state is not from US. To do so we must first mention the abbreviations for all the states in the US. The validation rule used is:

```
OR(
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)),
LEN(State) <> 2,
NOT(OR(Country ="US",Country ="USA",Country ="United States", ISBLANK(Country)))
)
```

Next, we create two queues for Rainbow Sales as well Assembly System Sales. The purpose of doing this is that all the leads gathered from website as well as partner and purchased lists go to separate sales team. The leads from website are to be routed to Rainbow Sales whereas the leads from the partners and purchased lists are to be routed to the Assembly System Sales.

### Step-3: Automate Accounts

In this step we create new fields on the account object namely:

- Number of Deals
- Number of won deals
- Last won deal date
- Deal win percent
- Amount of won deals
- Call for Service

After the creation of these new fields we create validation rules for billing and type. The validation for billing should check that whether the billing state is an US-state or not. The validation for type should check whether the account type is either "Customer - Direct" or "Customer - Channel".

### Step-4: Create Robot Setup Object

We create a custom object named "Robot Setup" having a master-detail relationship with opportunities. We create a formula for 'day of the week'. The formula is:

```
CASE(weekday(Date__c),
1,"Sunday",
2,"Monday",
```

```
3,"Tuesday",  
4,"Wednesday",  
5,"Thursday",  
6,"Friday",  
7,"Saturday",  
Text(weekday(Date__c))  
)
```

#### Step-5: Create Sales Process and Validate Opportunities

We create a sales process named 'RB Robotics Sales Process' with the available stages mentioned in the transcript. These are the stages we use: Prospecting, Qualification, Proposal/Price Quote, Negotiation/Review, Awaiting Approval, Closed Won, and Closed Lost. We then create a record type named 'RB Robotics Process RT' which has the above created sales process. We add a validation rule for 'anything over \$100K--have to be approved before they can close'. We create a 'Approved' checkbox to the opportunity object.

#### Step-6: Automate Opportunities

Create an email alert as we want to send an email to the finance group whenever an opportunity is created for a prospect or customer account. Now, when an opportunity is in Negotiations, we want to automatically submit it for approval if the amount is over \$100,000. So to solve this we create a approval process with entry criteria being the amount > \$100,000. The approval must be given by the manager so we create a user named 'Nushi Davoud' and assign her as the manager. We create a process using the process builder to automate all the above mentioned tasks. If the manager approves, the opportunity goes to the Closed/Won stage and If the manager doesn't approve, the opportunity should go back to Negotiation/Review stage.

#### Step-7: Create Flow for Opportunities

We create a flow which can assign the type of bot that the reps want. The type of bots include RainbowBot, CloudyBot, AssemblySystem. We are doing this so that a rep who's talking to a customer can just check a box on the opportunity for the type of robot the customer wants. We create radio button on the screen element present in the flow which displays all the three robots.

#### Step-8: Automate Setups

In the final step we want to change the dates of the robot setups. We want to remove Saturday and Sunday from the robot setup date and change it to Monday. To complete this step we use the previously created process. We clone the process and then add a formula to solve the problem.

```
CASE(  
MOD([Opportunity].CloseDate + 180 - DATE(1900, 1, 7),7),  
0, [Opportunity].CloseDate + 181,  
6, [Opportunity].CloseDate + 182,  
[Opportunity].CloseDate + 180  
)
```

Here 0 means Sunday and 6 means Saturday so we are changing the robot setup dates to Monday instead.