

Apex Triggers

Get Started with Apex Triggers -

AccountAddresstrigger

```
trigger AccountAddressTrigger on Account (before insert, before update) {  
  
    for(Account account:Trigger.New){  
        if(account.Match_Billing_Address__c == True){  
            account.ShippingPostalCode = account.BillingPostalCode;  
        }  
    }  
}
```

Bulk Apex Triggers -ClosedOpportunityTrigger

```
trigger ClosedOpportunityTrigger on Opportunity (after insert, after update) {  
  
    List<Task> tasklist = new List<Task>();  
  
    for(Opportunity opp: Trigger.New){  
        if(opp.StageName =='Closed Won'){  
            tasklist.add(new Task(Subject = 'Follow Up Test Task', WhatId = opp.Id));  
        }  
    }  
  
    if(tasklist.size()>0){  
        insert tasklist;  
    }  
}
```

Get Started with Apex Unit Tests -VerifyDate

```
public class VerifyDate{  
  
    //method to handle potential checks against two dates  
    public static Date CheckDates(Date date1, Date date2) {  
        //if date2 is within the next 30 days of date1, use date2. Otherwise use the end  
        of the month
```

```

        if(DateWithin30Days(date1,date2)) {
            return date2;
        } else {
            return SetEndOfMonthDate(date1);
        }
    }

//method to check if date2 is within the next 30 days of date1
private static Boolean DateWithin30Days(Date date1, Date date2) {
    //check for date2 being in the past
    if( date2 < date1 ) { return false; }

    //check that date2 is within (>=) 30 days of date1
    Date date30Days = date1.addDays(30); //create a date 30 days away from date1
    if( date2 >= date30Days ) { return false; }
    else { return true; }
}

//method to return the end of the month of a given date
private static Date SetEndOfMonthDate(Date date1) {
    Integer totalDays = Date.daysInMonth(date1.year(), date1.month());
    Date lastDay = Date.newInstance(date1.year(), date1.month(), totalDays);
    return lastDay;
}

}

```

TestVerifyDate

```

@isTest
public class TestVerifyDate {
    private static Date dateToday = date.today();
    private static Integer totalDays = Date.daysInMonth(dateToday.year(), dateToday.month());

    @isTest static void testOldDate(){
        Date dateTest = VerifyDate.CheckDates(dateToday, dateToday.addDays(-1));
        System.assertEquals(date.newInstance(dateToday.year(), dateToday.month(), totalDays),
dateTest);
    }

    @isTest static void testLessThan30Days(){

```

```

        Date dateTest = VerifyDate.CheckDates(dateToday, dateToday.addDays(20));
        System.assertEquals(dateToday.addDays(20), dateTest);
    }

    @isTest static void testMoreThan30Days(){
        Date dateTest = VerifyDate.CheckDates(dateToday, dateToday.addDays(31));
        System.assertEquals(date.newInstance(dateToday.year(), dateToday.month(), totalDays),
dateTest);
    }

}

```

Test Apex Triggers -~~RestrictContactByName~~

```

trigger RestrictContactByName on Contact (before insert, before update) {

    //check contacts prior to insert or update for invalid data
    For (Contact c : Trigger.New) {
        if(c.LastName == 'INVALIDNAME') { //invalidname is invalid
            c.AddError('The Last Name "'+c.LastName+'" is not allowed for DML');
        }
    }
}

```

TestRestrictContactByName

```

@isTest
public class TestRestrictContactByName {
    @isTest static void createBadContact(){
        Contact c=new Contact(FirstName='John',LastName='INVALIDNAME');
        Test.startTest();
        Database.SaveResult result=Database.insert(c,false);
        Test.stopTest();
        System.assert(!result.isSuccess());
    }
}

```

```
}
```

Create Test Data for Apex Tests - **RandomContactFactory**

```
//@isTest
public class RandomContactFactory {
    public static List<Contact> generateRandomContacts(Integer numContactsToGenerate, String
FName) {
        List<Contact> contactList = new List<Contact>();

        for(Integer i=0;i<numContactsToGenerate;i++) {
            Contact c = new Contact(FirstName=FName + '' + i, LastName = 'Contact '+i);
            contactList.add(c);
            System.debug(c);
        }
        //insert contactList;
        System.debug(contactList.size());
        return contactList;
    }
}
```

Asynchronous Apex

Use Future Methods - **AccountProcessor**

```
public with sharing class AccountProcessor {

    @future
    public static void countContacts(List<Id> acclds) {

        List<Account> lstAcc = [SELECT Id, Name, Number_of_Contacts__c, (SELECT Id FROM
Contacts) FROM Account WHERE Id IN :acclds];

        for (Account a : lstAcc){
            List<Contact> lstCon = a.Contacts;
            a.Number_of_Contacts__c = lstCon.size();
        }
    }
}
```

```
    }

    update lstAcc;
    system.debug('LstAccounts:::' + lstAcc);

}
}
```

AccountProcessorTest

```
@isTest
private class AccountProcessorTest {

    static TestMethod void myTest() {
        List<Account> accounts = new List<Account>();
        for (Integer i=0; i<100; i++) {
            Account account = new Account();
            account.Name = 'AccountProcessorTest Account ' + i;
            accounts.add(account);
        }
        insert accounts;

        List<Id> accountIds = new List<Id>();
        List<Contact> contacts = new List<Contact>();
        for (Account a : accounts) {
            accountIds.add(a.Id);
            for (Integer i=0; i<5; i++) {
                Contact contact = new Contact();
                contact.FirstName = 'AccountProcessor Test Contact';
                contact.LastName = String.valueOf(i);
                contact.AccountId = a.Id;
                contacts.add(contact);
            }
        }
        insert contacts;

        Test.startTest();
        AccountProcessor.countContacts(accountIds);
        Test.stopTest();
    }
}
```

```

List<Account> results = [SELECT Id, Number_of_Contacts__c
    FROM Account
    WHERE Id in :accountIds];
for (Account a : results) {
    System.AssertEquals(5, a.Number_of_Contacts__c);
}
}
}
}

```

Use Batch Apex -LeadProcessor

```

global class LeadProcessor implements
Database.Batchable<sObject>, Database.Stateful {

    // instance member to retain state across transactions
    global Integer recordsProcessed = 0;

    global Database.QueryLocator start(Database.BatchableContext bc) {
        return Database.getQueryLocator('SELECT Id, LeadSource FROM Lead');
    }

    global void execute(Database.BatchableContext bc, List<Lead> scope){
        // process each batch of records
        List<Lead> leads = new List<Lead>();
        for (Lead lead : scope) {

            lead.LeadSource = 'Dreamforce';
            // increment the instance member counter
            recordsProcessed = recordsProcessed + 1;

        }
        update leads;
    }

    global void finish(Database.BatchableContext bc){
        System.debug(recordsProcessed + ' records processed. Shazam!');
    }
}

```

LeadProcessorTest

```
@isTest
public class LeadProcessorTest {
    @testSetup
    static void setup() {
        List<Lead> leads = new List<Lead>();
        // insert 200 leads
        for (Integer i=0;i<200;i++) {
            leads.add(new Lead(LastName='Lead '+i,
                Company='Lead', Status='Open - Not Contacted'));
        }
        insert leads;
    }

    static testmethod void test() {
        Test.startTest();
        LeadProcessor lp = new LeadProcessor();
        Id batchId = Database.executeBatch(lp, 200);
        Test.stopTest();

        // after the testing stops, assert records were updated properly
        System.assertEquals(200, [select count() from lead where LeadSource = 'Dreamforce']);
    }
}
```

Control Processes with Queueable Apex -

AddPrimaryContact

```
public class AddPrimaryContact implements Queueable {
    private Contact contact;
    private String billingState;

    public AddPrimaryContact(Contact contact, String billingState) {
        this.contact = contact;
        this.billingState = billingState;
    }

    public void execute(QueueableContext context) {
```

```

List<Account> accounts = [SELECT Id
    FROM Account
    WHERE BillingState = :billingState
    LIMIT 200];

List<Contact> contacts = new List<Contact>();

for (Account account : accounts) {
    Contact clonedContact = contact.clone();
    clonedContact.AccountId = account.Id;
    contacts.add(clonedContact);
}

insert contacts;
}
}

```

AddPrimaryContactTest

```

@isTest
public class AddPrimaryContactTest {
    @isTest static void testMethod1() {
        // setup
        List<Account> testAcctList = new List<Account>();
        for (Integer i = 0; i < 50; i++) {
            testAcctList.add(new Account(BillingState = 'OR', name = 'TestAccount' + i));
        }
        for (Integer j = 0; j < 50; j++) {
            testAcctList.add(new Account(BillingState = 'WA', name = 'TestAccount' + j));
        }
        insert testAcctList;

        Contact c = new Contact(FirstName='Test', LastName='test');
        String state = 'OR';
        AddPrimaryContact apc = new AddPrimaryContact(c, state);

        // execution
        Test.startTest();
        System.enqueueJob(apc);
        Test.stopTest();
    }
}

```

```

    // result
    System.assertEquals(50, [SELECT count() FROM Contact WHERE accountId IN (SELECT Id
FROM Account WHERE BillingState = :state)]);
}
}

```

Schedule Jobs Using the Apex Scheduler -

DailyLeadProcessor

```

public class DailyLeadProcessor implements schedulable{

    public void execute(schedulableContext sc) {
        List<lead> l_lst_new = new List<lead>();
        List<lead> l_lst = new List<lead>([select id, leadsource from lead where leadsource = null]);
        for(lead l : l_lst) {
            l.leadsource = 'Dreamforce';
            l_lst_new.add(l);
        }
        update l_lst_new;
    }

}

```

DailyLeadProcessorTest

```

@isTest
public class DailyLeadProcessorTest {
    @testSetup
    static void setup(){
        List<Lead> lstOfLead = new List<Lead>();
        for(Integer i = 1; i <= 200; i++){
            Lead ld = new Lead(Company = 'Comp' + i ,LastName = 'LN'+i, Status = 'Working -
Contacted');
            lstOfLead.add(ld);
        }
        Insert lstOfLead;
    }
    static testmethod void testDailyLeadProcessorScheduledJob(){
        String sch = '0 5 12 * * ?';
    }
}

```

```
        Test.startTest();
        String jobId = System.schedule('ScheduledApexTest', sch, new DailyLeadProcessor());

        List<Lead> lstOfLead = [SELECT Id FROM Lead WHERE LeadSource = null LIMIT 200];
        System.assertEquals(200, lstOfLead.size());

        Test.stopTest();
    }
}
```

Apex Integration Services

AnimalLocator

Apex REST Callouts

```
public class AnimalLocator {
    public class cls_animal {
        public Integer id;
        public String name;
        public String eats;
        public String says;
    }
}
```

```
public class JSONOutput{
    public cls_animal animal;
```



```
//Map<String, Object> map_results =
(Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
    jsonOutput results = (jsonOutput)
JSON.deserialize(response.getBody(),
jsonOutput.class);
    //Object results = (Object)
map_results.get('animal');
    system.debug('results= ' +
results.animal.name);
    return(results.animal.name);
}

}
```

AnimalLocatorTest

```
@IsTest
public class AnimalLocatorTest {
    @isTest
    public static void testAnimalLocator() {
        Test.setMock(HttpCalloutMock.class, new AnimalLocatorMock());
        //Httpresponse response = AnimalLocator.getAnimalNameById(1);
        String s = AnimalLocator.getAnimalNameById(1);
        system.debug('string returned: ' + s);
```

```
 }  
}
```

AnimalLocatorMock

```
@IsTest  
global class AnimalLocatorMock implements HttpCalloutMock {  
  
    global HTTPResponse respond(HTTPRequest request) {  
        Httpresponse response = new Httpresponse();  
        response.setStatusCode(200);  
        //-- directly output the JSON, instead of creating a logic  
        //response.setHeader('key, value)  
        //Integer id = Integer.valueOf(request.getHeader('id'));  
        //Integer id = 1;  
        //List<String> lst_body = new List<String> {'majestic badger', 'fluffy bunny'};  
        //system.debug('animal return value: ' + lst_body[id]);  
        response.setBody('{"animal":{"id":1,"name":"chicken","eats":"chicken food","says":"cluck  
cluck"}}');  
        return response;  
    }  
}
```

Apex SOAP Callouts - ParkLocator

```
public class ParkLocator {  
    public static String[] country(String country){  
        ParkService.ParksImplPort Locator = new ParkService.ParksImplPort();  
        return Locator.byCountry(country);  
    }  
}
```

ParkLocatorTest

```
@isTest  
public class ParkLocatorTest {  
    @isTest static void testMock(){  
        test.setMock(WebServiceMock.class, new ParkServiceMock());
```

```

        String[] parksName = ParkLocator.Country('India');
        List<String> country = new List<String>();
        country.add('Inamdar National Park');
        country.add('Riza National Park');
        country.add('Shilpa National Park');
        System.assertEquals(country, parksName, 'park names are not as expected');
    }

}

```

ParkService

```

public class ParkService {
    public class byCountryResponse {
        public String[] return_x;
        private String[] return_x_type_info = new String[]{'return','http://parks.services/','null','0','-1','false'};
        private String[] apex_schema_type_info = new String[]{'http://parks.services/','false','false'};
        private String[] field_order_type_info = new String[]{'return_x'};
    }
    public class byCountry {
        public String arg0;
        private String[] arg0_type_info = new String[]{'arg0','http://parks.services/','null','0','1','false'};
        private String[] apex_schema_type_info = new String[]{'http://parks.services/','false','false'};
        private String[] field_order_type_info = new String[]{'arg0'};
    }
    public class ParksImplPort {
        public String endpoint_x = 'https://th-apex-soap-service.herokuapp.com/service/parks';
        public Map<String,String> inputHttpHeaders_x;
        public Map<String,String> outputHttpHeaders_x;
        public String clientCertName_x;
        public String clientCert_x;
        public String clientCertPasswd_x;
        public Integer timeout_x;
        private String[] ns_map_type_info = new String[]{'http://parks.services/','ParkService'};
        public String[] byCountry(String arg0) {
            ParkService.byCountry request_x = new ParkService.byCountry();
            request_x.arg0 = arg0;
        }
    }
}

```

```

        ParkService.byCountryResponse response_x;
        Map<String, ParkService.byCountryResponse> response_map_x = new Map<String,
ParkService.byCountryResponse>();
        response_map_x.put('response_x', response_x);
        WebServiceCallout.invoke(
            this,
            request_x,
            response_map_x,
            new String[]{endpoint_x,
            '',
            'http://parks.services/',
            'byCountry',
            'http://parks.services/',
            'byCountryResponse',
            'ParkService.byCountryResponse'}
        );
        response_x = response_map_x.get('response_x');
        return response_x.return_x;
    }
}
}
}

```

ParkServiceMock

```

global class ParkServiceMock implements WebServiceMock {

    global void doInvoke(Object stub, Object request, Map<String, Object> response, String
endpoint,
        String soapAction, String requestName, String responseNS, String responseName, String
responseType){
        ParkService.byCountryResponse response_x = new
ParkService.byCountryResponse();
        List<String> country = new List<String>();
        country.add('Inamdar Shola National Park');
        country.add('Riza National Park');
        country.add('Shilpa National Park');
        response_x.return_x = country;
        response.put('response_x', response_x);
    }
}

```

Apex Web Services -**AccountManager**

```
@RestResource(urlMapping='/Accounts/*/contacts')
global with sharing class AccountManager{
    @HttpGet
    global static Account getAccount(){
        RestRequest req = RestContext.request;
        String accId = req.requestURI.substringBetween('Accounts/', '/contacts');
        Account acc = [SELECT Id, Name, (SELECT Id, Name FROM Contacts)
                      FROM Account WHERE Id = :accId];

        return acc;
    }
}
```

AccountManagerTest

```
@IsTest
private class AccountManagerTest{
    @isTest static void testAccountManager(){
        Id recordId = getTestId();
        // Set up a test request
        RestRequest request = new RestRequest();
        request.requestUri =
            'https://ap5.salesforce.com/services/apexrest/Accounts/' + recordId + '/contacts';
        request.httpMethod = 'GET';
        RestContext.request = request;

        // Call the method to test
        Account acc = AccountManager.getAccount();

        // Verify results
        System.assert(acc != null);
    }
}
```

The screenshot shows the Salesforce Setup interface under the 'Remote Site Settings' section. A search bar at the top left contains 'remote'. The main content area displays the 'Remote Site Details' for 'animals_http'. The details are as follows:

Remote Site Detail
Remote Site Name: animals_http
Remote Site URL: https://th-apex-http-callout.herokuapp.com
Disable Protocol Security: <input type="checkbox"/>
Description: Trailhead animal service: HTTP
Active: <input checked="" type="checkbox"/>
Created By: Akshitha Reddy, 6/24/2022, 4:50 AM

Buttons for 'Edit', 'Delete', and 'Clone' are located below the table. The status bar at the bottom right shows 'Activate Windows' and 'Go to Settings to activate Windows.'

The screenshot shows the Salesforce Setup interface under the 'Remote Site Settings' section. A search bar at the top left contains 'remote'. The main content area displays the 'Remote Site Details' for 'animals_soap'. The details are as follows:

Remote Site Detail
Remote Site Name: animals_soap
Remote Site URL: https://th-apex-soap-service.herokuapp.com
Disable Protocol Security: <input type="checkbox"/>
Description: Trailhead animal service: SOAP
Active: <input checked="" type="checkbox"/>
Created By: Akshitha Reddy, 6/24/2022, 4:51 AM

Buttons for 'Edit', 'Delete', and 'Clone' are located below the table. A new button labeled 'Smart Intenz' has been added. The status bar at the bottom right shows 'Activate Windows' and 'Go to Settings to activate Windows.'

Apex Specialist

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

- Maintenance Request Field Type** configuration page.
- Field Information** section:

Field Label	Type	Field Name	Type
Data Type	Picklist		
Help Text			
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
- Picklist Values Used** section:

Active picklist values	Inactive picklist values
7 (1,000 max)	1
- Field Dependencies** section: No dependencies defined.
- Validation Rules** section: None.
- Custom Field Definition Detail** for **Equipment**:

Field Label	Object Name	Field Name	Data Type
Equipment	Case	Equipment	Lookup
API Name		Equipment_c	
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
- Lookup Options** section:

Related To	Child Relationship Name
Product	Maintenance_Request
Related List Label	
Required	<input type="checkbox"/>
What to do if the lookup record is deleted?	Clear the value of this field.

MAINTENANCEREQUEST

```
trigger MaintenanceRequest on Case (before update, after update) {
    if(Trigger.isUpdate && Trigger.isAfter){
        MaintenanceRequestHelper.updateWorkOrders(Trigger.new, Trigger.oldMap);
    }
}
```

```
// ToDo: Call MaintenanceRequestHelper.updateWorkOrders
}
```

MAINTENANCEREQUESTHELPER

```
@istest
```

```
public with sharing class MaintenanceRequestHelperTest {
```

```
    private static final string STATUS_NEW = 'New';
    private static final string WORKING = 'Working';
    private static final string CLOSED = 'Closed';
    private static final string REPAIR = 'Repair';
    private static final string REQUEST_ORIGIN = 'Web';
    private static final string REQUEST_TYPE = 'Routine Maintenance';
    private static final string REQUEST SUBJECT = 'Testing subject';
```

```
    PRIVATE STATIC Vehicle__c createVehicle(){
        Vehicle__c Vehicle = new Vehicle__C(name = 'SuperTruck');
        return Vehicle;
    }
```

```
    PRIVATE STATIC Product2 createEq(){
        product2 equipment = new product2(name = 'SuperEquipment',
            lifespan_months__C = 10,
            maintenance_cycle__C = 10,
            replacement_part__c = true);
        return equipment;
    }
```

```
    PRIVATE STATIC Case createMaintenanceRequest(id vehicleId, id equipmentId){
        case cs = new case(Type=REPAIR,
            Status=STATUS_NEW,
            Origin=REQUEST_ORIGIN,
            Subject=REQUEST SUBJECT,
            Equipment__c=equipmentId,
            Vehicle__c=vehicleId);
        return cs;
    }
```

```
    PRIVATE STATIC Equipment_Maintenance_Item__c createWorkPart(id equipmentId,id
```

```

requestId){
    Equipment_Maintenance_Item__c wp = new
    Equipment_Maintenance_Item__c(Equipment__c = equipmentId,
                                    Maintenance_Request__c = requestId);
    return wp;
}

```

```

@istest
private static void testMaintenanceRequestPositive(){
    Vehicle__c vehicle = createVehicle();
    insert vehicle;
    id vehicleId = vehicle.Id;

    Product2 equipment = createEq();
    insert equipment;
    id equipmentId = equipment.Id;

    case somethingToUpdate = createMaintenanceRequest(vehicleId,equipmentId);
    insert somethingToUpdate;

    Equipment_Maintenance_Item__c workP =
    createWorkPart(equipmentId,somethingToUpdate.id);
    insert workP;

    test.startTest();
    somethingToUpdate.status = CLOSED;
    update somethingToUpdate;
    test.stopTest();

    Case newReq = [Select id, subject, type, Equipment__c, Date_Reported__c, Vehicle__c,
Date_Due__c
                  from case
                  where status =:STATUS_NEW];

    Equipment_Maintenance_Item__c workPart = [select id
                                              from Equipment_Maintenance_Item__c
                                              where Maintenance_Request__c =:newReq.Id];

    system.assert(workPart != null);
    system.assert(newReq.Subject != null);
}

```

```

        system.assertEquals(newReq.Type, REQUEST_TYPE);
        SYSTEM.assertEquals(newReq.Equipment__c, equipmentId);
        SYSTEM.assertEquals(newReq.Vehicle__c, vehicleId);
        SYSTEM.assertEquals(newReq.Date_Reported__c, system.today());
    }

@istest
private static void testMaintenanceRequestNegative(){
    Vehicle__C vehicle = createVehicle();
    insert vehicle;
    id vehicleId = vehicle.Id;

    product2 equipment = createEq();
    insert equipment;
    id equipmentId = equipment.Id;

    case emptyReq = createMaintenanceRequest(vehicleId,equipmentId);
    insert emptyReq;

    Equipment_Maintenance_Item__c workP = createWorkPart(equipmentId, emptyReq.Id);
    insert workP;

    test.startTest();
    emptyReq.Status = WORKING;
    update emptyReq;
    test.stopTest();

    list<case> allRequest = [select id
                                from case];
}

Equipment_Maintenance_Item__c workPart = [select id
                                            from Equipment_Maintenance_Item__c
                                            where Maintenance_Request__c = :emptyReq.Id];

system.assert(workPart != null);
system.assert(allRequest.size() == 1);
}

@istest
private static void testMaintenanceRequestBulk(){
    list<Vehicle__C> vehicleList = new list<Vehicle__C>();

```

```

list<Product2> equipmentList = new list<Product2>();
list<Equipment_Maintenance_Item__c> workPartList = new
list<Equipment_Maintenance_Item__c>();
list<case> requestList = new list<case>();
list<id> oldRequestIds = new list<id>();

for(integer i = 0; i < 300; i++){
    vehicleList.add(createVehicle());
    equipmentList.add(createEq());
}
insert vehicleList;
insert equipmentList;

for(integer i = 0; i < 300; i++){
    requestList.add(createMaintenanceRequest(vehicleList.get(i).id, equipmentList.get(i).id));
}
insert requestList;

for(integer i = 0; i < 300; i++){
    workPartList.add(createWorkPart(equipmentList.get(i).id, requestList.get(i).id));
}
insert workPartList;

test.startTest();
for(case req : requestList){
    req.Status = CLOSED;
    oldRequestIds.add(req.Id);
}
update requestList;
test.stopTest();

list<case> allRequests = [select id
                           from case
                           where status =: STATUS_NEW];

list<Equipment_Maintenance_Item__c> workParts = [select id
                                                 from Equipment_Maintenance_Item__c
                                                 where Maintenance_Request__c in: oldRequestIds];

system.assert(allRequests.size() == 300);
}

```

```
}
```

WAREHOUSECALLOUTSERVICE

```
public with sharing class WarehouseCalloutService {  
  
    private static final String WAREHOUSE_URL = 'https://th-superbadge-apex.herokuapp.com/equipment';  
  
    //@future(callout=true)  
    public static void runWarehouseEquipmentSync(){  
  
        Http http = new Http();  
        HttpRequest request = new HttpRequest();  
  
        request.setEndpoint(WAREHOUSE_URL);  
        request.setMethod('GET');  
        HttpResponse response = http.send(request);  
  
        List<Product2> warehouseEq = new List<Product2>();  
  
        if (response.getStatusCode() == 200){  
            List<Object> jsonResponse =  
            (List<Object>)JSON.deserializeUntyped(response.getBody());  
            System.debug(response.getBody());  
  
            for (Object eq : jsonResponse){  
                Map<String, Object> mapJson = (Map<String, Object>)eq;  
                Product2 myEq = new Product2();  
                myEq.Replacement_Part__c = (Boolean) mapJson.get('replacement');  
                myEq.Name = (String) mapJson.get('name');  
                myEq.Maintenance_Cycle__c = (Integer) mapJson.get('maintenanceperiod');  
                myEq.Lifespan_Months__c = (Integer) mapJson.get('lifespan');  
                myEq.Cost__c = (Decimal) mapJson.get('lifespan');  
                myEq.Warehouse_SKU__c = (String) mapJson.get('sku');  
                myEq.Current_Inventory__c = (Double) mapJson.get('quantity');  
                warehouseEq.add(myEq);  
            }  
  
            if (warehouseEq.size() > 0){  
                // Logic to insert or update records in warehouseEq  
            }  
        }  
    }  
}
```

```

        upsert warehouseEq;
        System.debug('Your equipment was synced with the warehouse one');
        System.debug(warehouseEq);
    }

}
}
}

```

WAREHOUSECALLOUTSERVICETEST

@isTest

```

private class WarehouseCalloutServiceTest {
    @isTest
    static void testWareHouseCallout(){
        Test.startTest();
        // implement mock callout test here
        Test.setMock(HTTPCalloutMock.class, new WarehouseCalloutServiceMock());
        WarehouseCalloutService.runWarehouseEquipmentSync();
        Test.stopTest();
        System.assertEquals(1, [SELECT count() FROM Product2]);
    }
}

```

WAREHOUSESYNCSCHEDULE

```

global class WarehouseSyncSchedule implements schedulable {
    // implement scheduled code here
    global void execute(SchedulableContext sc){

```

WarehouseCalloutService.runWarehouseEquipmentSync();

```

    }
}

```

@isTest

```

public class WarehouseSyncScheduleTest {

```

```

    @isTest static void WarehousescheduleTest(){
        String scheduleTime = '00 00 01 * * ?';
        Test.startTest();

```

```

    Test.setMock(HttpCalloutMock.class, new WarehouseCalloutServiceMock());
    String jobID=System.schedule('Warehouse Time To Schedule to Test', scheduleTime, new
WarehouseSyncSchedule());
    Test.stopTest();
    //Contains schedule information for a scheduled job. CronTrigger is similar to a cron job on
UNIX systems.
    // This object is available in API version 17.0 and later.
    CronTrigger a=[SELECT Id FROM CronTrigger where NextFireTime > today];
    System.assertEquals(jobID, a.Id,'Schedule ');
}

}

```

MaintenanceRequestHelperTest

```

@istest
public with sharing class MaintenanceRequestHelperTest {

    private static final string STATUS_NEW = 'New';
    private static final string WORKING = 'Working';
    private static final string CLOSED = 'Closed';
    private static final string REPAIR = 'Repair';
    private static final string REQUEST_ORIGIN = 'Web';
    private static final string REQUEST_TYPE = 'Routine Maintenance';
    private static final string REQUEST SUBJECT = 'Testing subject';

    PRIVATE STATIC Vehicle__c createVehicle(){
        Vehicle__c Vehicle = new Vehicle__C(name = 'SuperTruck');
        return Vehicle;
    }

    PRIVATE STATIC Product2 createEq(){
        product2 equipment = new product2(name = 'SuperEquipment',
            lifespan_months__C = 10,
            maintenance_cycle__C = 10,
            replacement_part__c = true);
        return equipment;
    }

    PRIVATE STATIC Case createMaintenanceRequest(id vehicleId, id equipmentId){
        case cs = new case(Type=REPAIR,

```

```

        Status=STATUS_NEW,
        Origin=REQUEST_ORIGIN,
        Subject=REQUEST SUBJECT,
        Equipment__c=equipmentId,
        Vehicle__c=vehicleId);
    return cs;
}

PRIVATE STATIC Equipment_Maintenance_Item__c createWorkPart(id equipmentId,id
requestId){
    Equipment_Maintenance_Item__c wp = new
Equipment_Maintenance_Item__c(Equipment__c = equipmentId,
                                Maintenance_Request__c = requestId);
    return wp;
}

@istest
private static void testMaintenanceRequestPositive(){
    Vehicle__c vehicle = createVehicle();
    insert vehicle;
    id vehicleId = vehicle.Id;

    Product2 equipment = createEq();
    insert equipment;
    id equipmentId = equipment.Id;

    case somethingToUpdate = createMaintenanceRequest(vehicleId,equipmentId);
    insert somethingToUpdate;

    Equipment_Maintenance_Item__c workP =
createWorkPart(equipmentId,somethingToUpdate.id);
    insert workP;

    test.startTest();
    somethingToUpdate.status = CLOSED;
    update somethingToUpdate;
    test.stopTest();

    Case newReq = [Select id, subject, type, Equipment__c, Date_Reported__c, Vehicle__c,
Date_Due__c

```

```

from case
where status =:STATUS_NEW];

Equipment_Maintenance_Item__c workPart = [select id
                                             from Equipment_Maintenance_Item__c
                                             where Maintenance_Request__c =:newReq.Id];

system.assert(workPart != null);
system.assert(newReq.Subject != null);
system.assertEquals(newReq.Type, REQUEST_TYPE);
SYSTEM.assertEquals(newReq.Equipment__c, equipmentId);
SYSTEM.assertEquals(newReq.Vehicle__c, vehicleId);
SYSTEM.assertEquals(newReq.Date_Reported__c, system.today());
}

@istest
private static void testMaintenanceRequestNegative(){
    Vehicle__C vehicle = createVehicle();
    insert vehicle;
    id vehicleId = vehicle.Id;

    product2 equipment = createEq();
    insert equipment;
    id equipmentId = equipment.Id;

    case emptyReq = createMaintenanceRequest(vehicleId,equipmentId);
    insert emptyReq;

    Equipment_Maintenance_Item__c workP = createWorkPart(equipmentId, emptyReq.Id);
    insert workP;

    test.startTest();
    emptyReq.Status = WORKING;
    update emptyReq;
    test.stopTest();

    list<case> allRequest = [select id
                             from case];
}

Equipment_Maintenance_Item__c workPart = [select id
                                             from Equipment_Maintenance_Item__c
                                             where Maintenance_Request__c =:newReq.Id];

```

```

        where Maintenance_Request__c = :emptyReq.Id];

system.assert(workPart != null);
system.assert(allRequest.size() == 1);
}

@istest
private static void testMaintenanceRequestBulk(){
    list<Vehicle__C> vehicleList = new list<Vehicle__C>();
    list<Product2> equipmentList = new list<Product2>();
    list<Equipment_Maintenance_Item__c> workPartList = new
list<Equipment_Maintenance_Item__c>();
    list<case> requestList = new list<case>();
    list<id> oldRequestIds = new list<id>();

for(integer i = 0; i < 300; i++){
    vehicleList.add(createVehicle());
    equipmentList.add(createEq());
}
insert vehicleList;
insert equipmentList;

for(integer i = 0; i < 300; i++){
    requestList.add(createMaintenanceRequest(vehicleList.get(i).id,
equipmentList.get(i).id));
}
insert requestList;

for(integer i = 0; i < 300; i++){
    workPartList.add(createWorkPart(equipmentList.get(i).id, requestList.get(i).id));
}
insert workPartList;

test.startTest();
for(case req : requestList){
    req.Status = CLOSED;
    oldRequestIds.add(req.Id);
}
update requestList;
test.stopTest();
}

```

```

list<case> allRequests = [select id
    from case
    where status =: STATUS_NEW];

list<Equipment_Maintenance_Item__c> workParts = [select id
    from Equipment_Maintenance_Item__c
    where Maintenance_Request__c in: oldRequestIds];

system.assert(allRequests.size() == 300);
}
}

```

WarehousecalloutServiceMock

```

@isTest
global class WarehouseCalloutServiceMock implements HttpCalloutMock {
    // implement http mock callout
    global static HttpResponse respond(HttpRequest request){

        System.assertEquals('https://th-superbadge-apex.herokuapp.com/equipment',
request.getEndpoint());
        System.assertEquals('GET', request.getMethod());

        // Create a fake response
        HttpResponse response = new HttpResponse();
        response.setHeader('Content-Type', 'application/json');

response.setBody('[{"_id":"55d66226726b611100aaf741","replacement":false,"quantity":5,"name
":"Generator 1000 kW","maintenanceperiod":365,"lifespan":120,"cost":5000,"sku":"100003"}]');
        response.setStatusCode(200);
        return response;
    }
}

```

WarehousecalloutserviceTest

```

@isTest

private class WarehouseCalloutServiceTest {
    @isTest
    static void testWareHouseCallout(){
        Test.startTest();

```

```
// implement mock callout test here
Test.setMock(HTTPCalloutMock.class, new WarehouseCalloutServiceMock());
WarehouseCalloutService.runWarehouseEquipmentSync();
Test.stopTest();
System.assertEquals(1, [SELECT count() FROM Product2]);
}
}
```

warehousesyncschedule

```
global class WarehouseSyncSchedule implements schedulable {
// implement scheduled code here
global void execute(SchedulableContext sc){

WarehouseCalloutService.runWarehouseEquipmentSync();

}
}
```

warehousesyncscheduleTest

```
@isTest
public class WarehouseSyncScheduleTest {

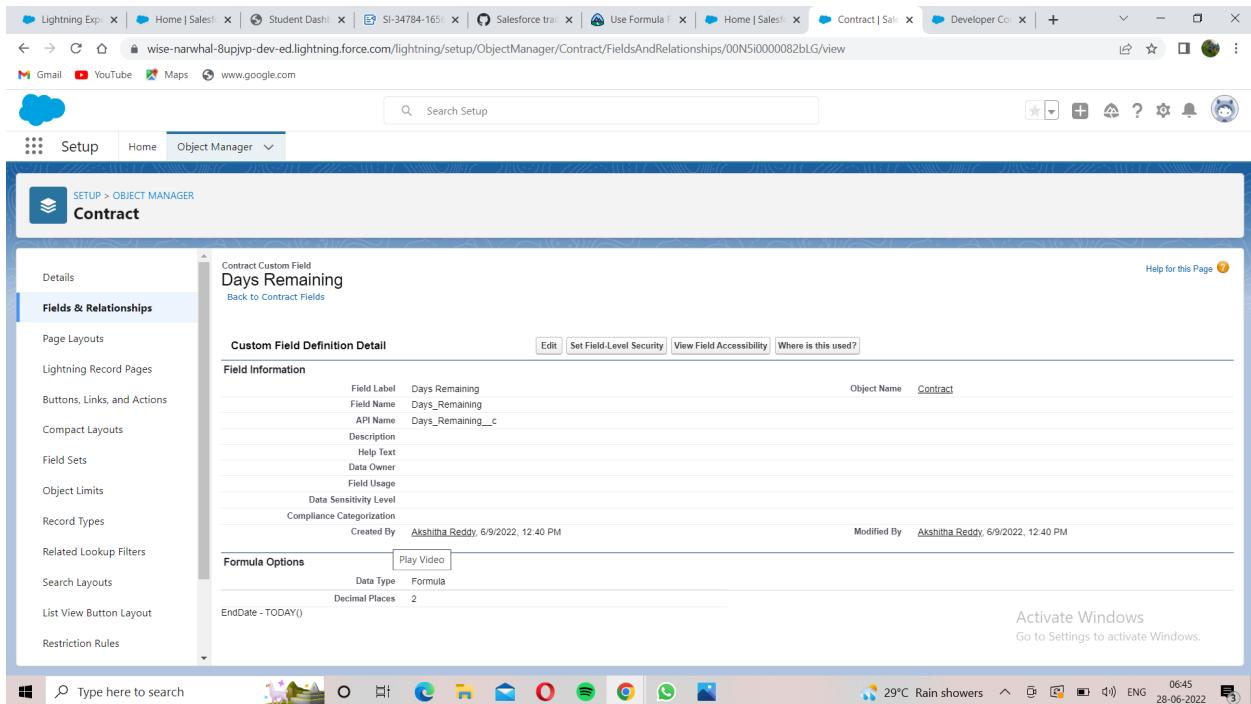
@isTest static void WarehousescheduleTest(){
String scheduleTime = '00 00 01 * * ?';
Test.startTest();
Test.setMock(HttpCalloutMock.class, new WarehouseCalloutServiceMock());
String jobID=System.schedule('Warehouse Time To Schedule to Test', scheduleTime, new
WarehouseSyncSchedule());
Test.stopTest();
//Contains schedule information for a scheduled job. CronTrigger is similar to a cron job
on UNIX systems.
// This object is available in API version 17.0 and later.
CronTrigger a=[SELECT Id FROM CronTrigger where NextFireTime > today];
System.assertEquals(jobID, a.Id)'Schedule ');

}
}
```

Process Automation Specialist

Formulas and Validations

Use Formula Fields



Implement Roll-Up Summary Fields

Potential Value

Custom Field Definition Detail

Field Information

Field Label	Potential Value
Field Name	Potential_Value
API Name	Potential_Value__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	

Created By: Akshitha Reddy, 6/9/2022, 12:17 PM Modified By: Akshitha Reddy, 6/9/2022, 12:17 PM

Roll-Up Summary Options

Data Type	Roll-Up Summary
Summarized Object	Opportunity
Field to Aggregate	Opportunity_Expected_Revenue
Filter Criteria	

Summary Type: SUM

Activate Windows
Go to Settings to activate Windows.

Create Validation Rules

Contact Validation Rule

Validation Rule Detail

Rule Name	Contact_must_be_in_Account_ZIP_Code
Error Condition Formula	AND(NOT(ISBLANK(AccountId)), MailingPostalCode <> Account.ShippingPostalCode)
Error Message	Contact must be in Account ZIP Code
Description	
Created By	Akshitha Reddy, 6/9/2022, 12:34 PM

Active: ✓

Error Location: Top of Page

Modified By: Akshitha Reddy, 6/9/2022, 12:34 PM

More actions

Activate Windows
Go to Settings to activate Windows.

Salesforce Flow

Automate Simple Business Processes with Process Builder

The screenshot shows the Salesforce Process Builder interface. At the top, there's a navigation bar with tabs like Setup, Home, Object Manager, and a search bar. Below the header, a message encourages using Flow Builder instead of Process Builder.

The main area displays a process flow for "Process Builder - Updates Child Contacts". The flow starts with a "START" step, followed by an "Account" step. This is followed by a decision diamond labeled "Account shipping address". If the condition is TRUE, it leads to an "IMMEDIATE ACTIONS" section containing "Update Records" and a "+ Add Action" button. A "STOP" step follows this. If the condition is FALSE, it leads to another decision diamond labeled "+ Add Criteria". If this condition is TRUE, it also leads to an "IMMEDIATE ACTIONS" section with "Update Records" and a "+ Add Action" button, followed by a "STOP" step. The FALSE path from the first decision diamond leads directly to a "STOP" step.

On the right side of the screen, there's a sidebar with the message "Activate Windows Go to Settings to activate Windows." and a "javascript:void(0);" button at the bottom.

The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray.

Screenshot of the Salesforce Process Automation interface showing a flow for updating child contacts based on account shipping address.

Flow Details:

```

graph TD
    Start((START)) --> Account[Account]
    Account --> Decision{Account shipping address}
    Decision -- TRUE --> UpdateRecords[Update Records]
    UpdateRecords --> Stop((STOP))
    Decision -- FALSE --> AddCriteria{+ Add Criteria}
    AddCriteria -- TRUE --> UpdateRecords
    UpdateRecords --> Stop
    AddCriteria -- FALSE --> Decision

```

Action Group Criteria:

Field *	Operator *	Type *	Value *
[Account].ShippingAddress	Is changed	Boolean	True
[Account].ShippingAddress	Is changed	Boolean	True
[Account].ShippingAddress	Is changed	Boolean	True
[Account].ShippingAddress	Is changed	Boolean	True
[Account].ShippingAddress	Is changed	Boolean	True

Conditions:

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

Update Records Action:

Action Name: Update Records

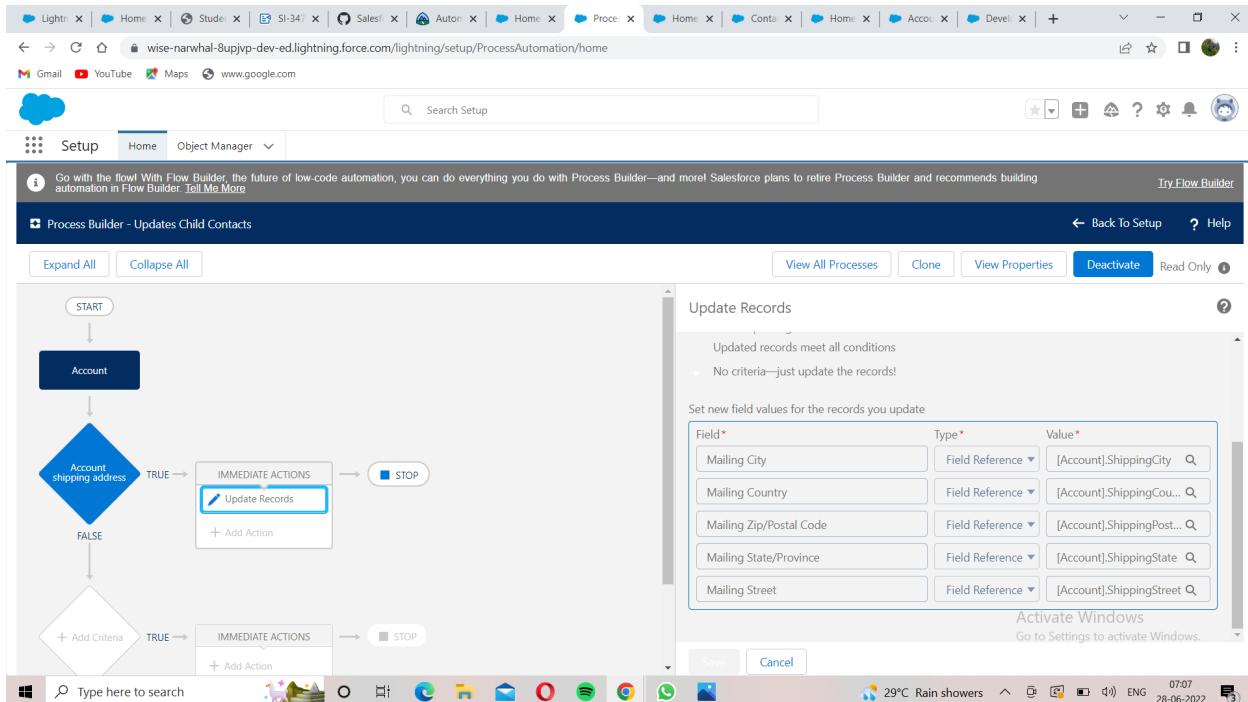
Record: [Account].Contacts

Criteria for Updating Records: Updated records meet all conditions

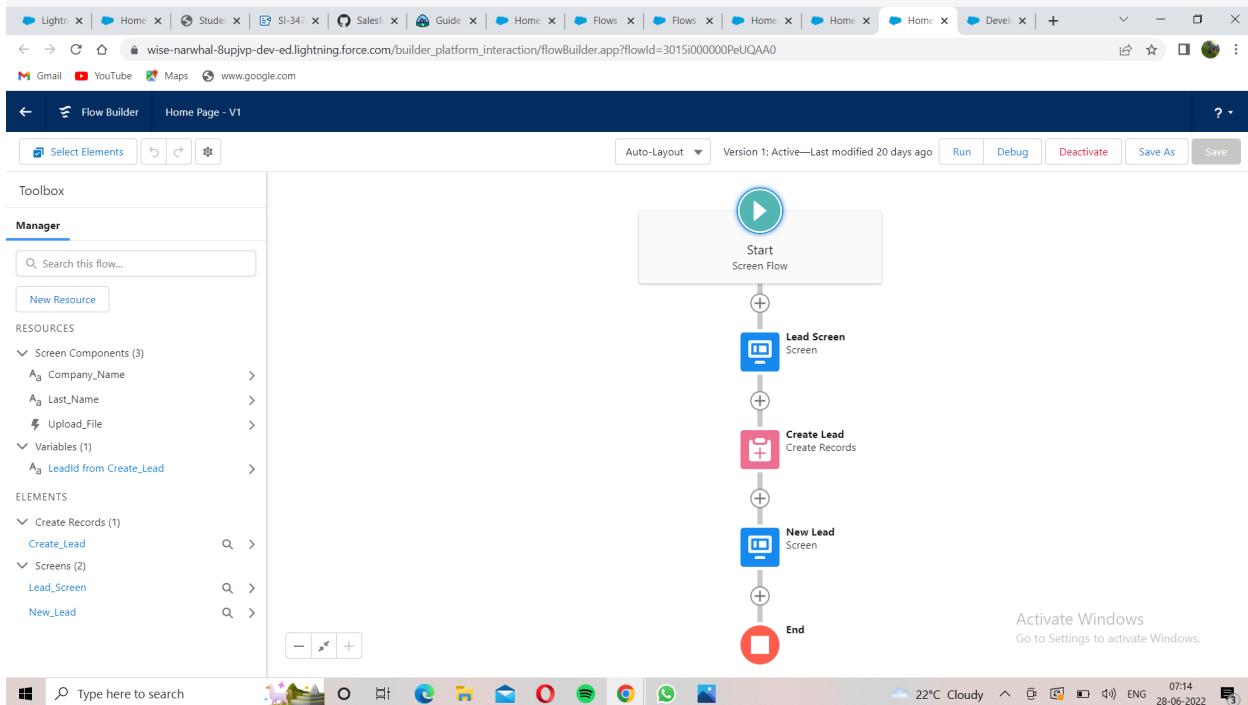
No criteria—just update the records!

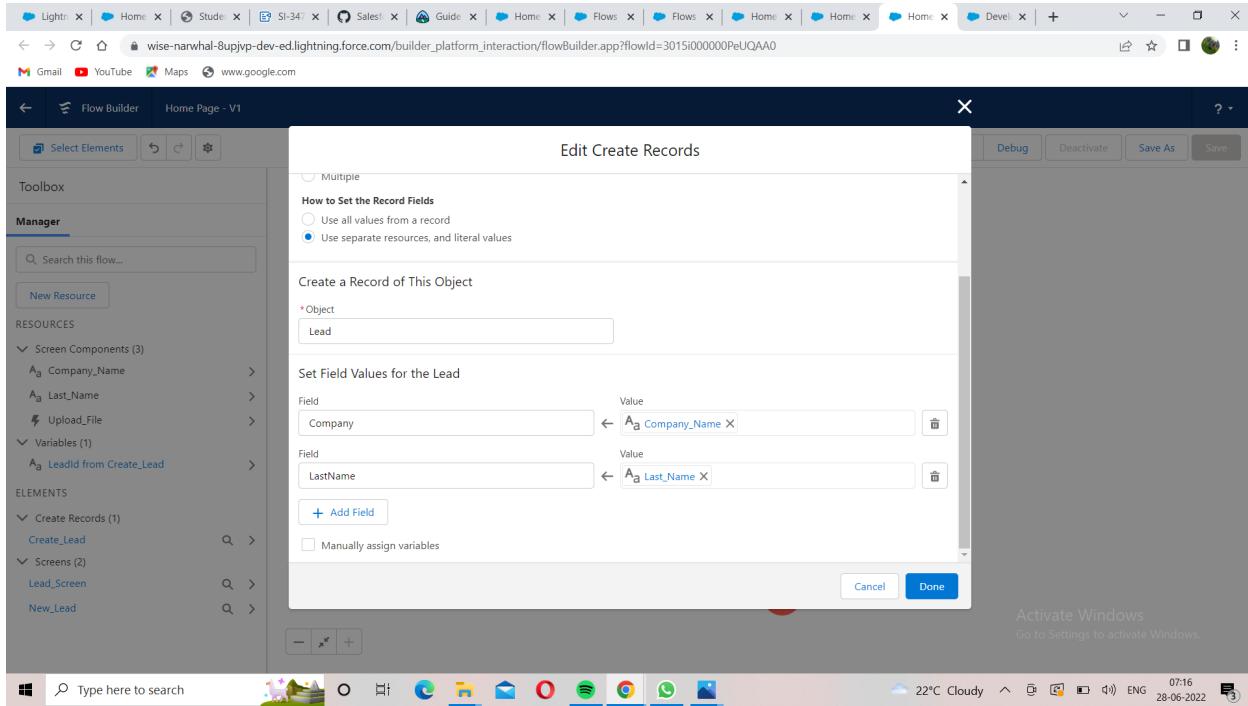
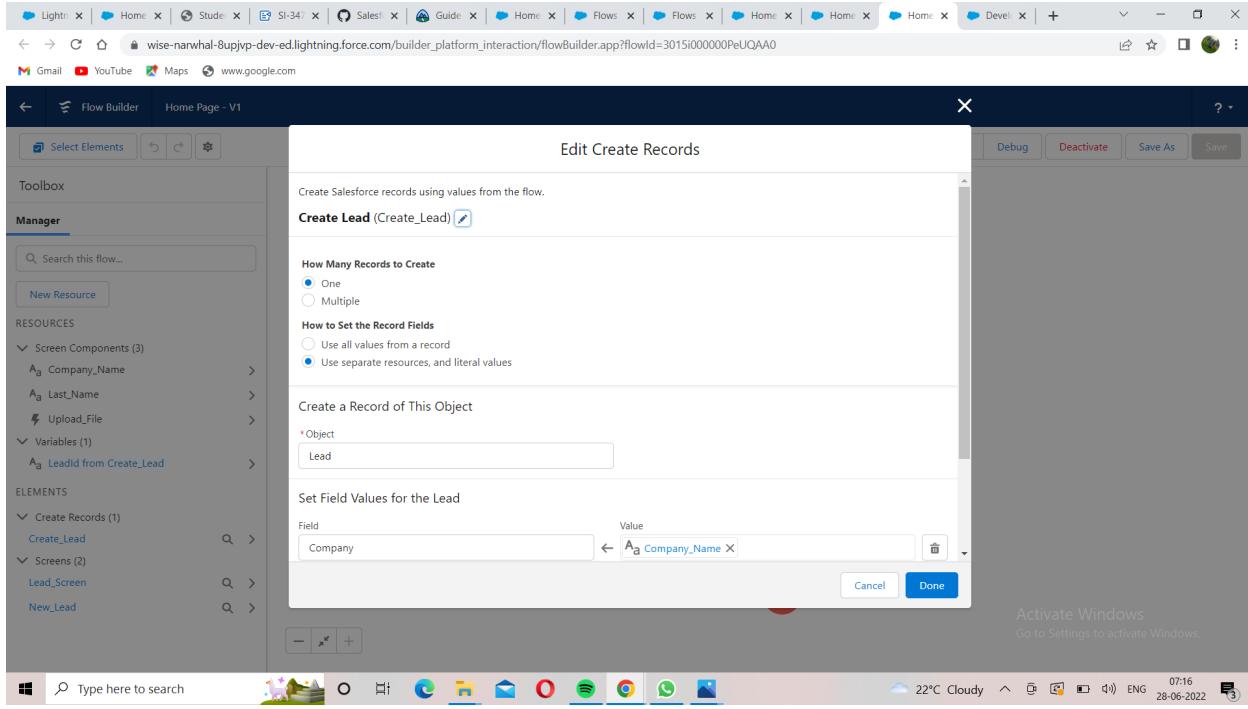
Set new field values for the records you update:

Field *	Type *	Value *
Mailing City	Field Reference	(Account).ShippingCity



Guide Users Through Your Business Processes with Flow Builder





Customize How Records Get Approved with Approvals

Student Dashboard | SI-34784-1656389140 | Customize How Records Are Displayed | Home | Salesforce | Approval Processes | Lightning Experience | Product Quick Search | + | - | X

wise-narwhal-8upjvp-dev-ed.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04a5i000000XmYS

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Cloud Setup Home Object Manager

Search Setup

Approval

Data

Mass Transfer Approval Requests

Process Automation

Approval Processes

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

Approval Processes

Account: Approve New Account

Back to Approval Process List

Help for this Page

Process Definition Detail

Process Name	Approve New Account	Active	✓
Unique Name	Approve_New_Account	Next Automated Approver Determined By	
Description			
Entry Criteria	(Account: Type EQUALS Prospect) AND (Account: Employees GREATER THAN 500)		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	Marketing_Product Inquiry Response		
Initial Submitter	Account Owner		
Created By	Akshitha Reddy, 6/8/2022, 5:23 AM	Modified By	Akshitha Reddy

Initial Submission Actions

Action	Type	Description
Record Lock	Field Update	Lock the record from being edited Account_Type_To_Pending

Approval Steps

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

Activate Windows

Go to Settings to activate Windows.

22°C Cloudy 09:50 28-06-2022

Student Dashboard | SI-34784-1656389140 | Customize How Records Are Displayed | Home | Salesforce | Approval Processes | Lightning Experience | Product Quick Search | + | - | X

wise-narwhal-8upjvp-dev-ed.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04a5i000000XmYS

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Approval

Data

Mass Transfer Approval Requests

Process Automation

Approval Processes

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

Approval Processes

Initial Submission Actions

Action	Type	Description
Record Lock	Field Update	Lock the record from being edited Account_Type_To_Pending

Approval Steps

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

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing Account_Type_To_Customer

Final Rejection Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing Type_To_Prospect

Recall Actions

Action	Type	Description
Edit	Field Update	

Activate Windows

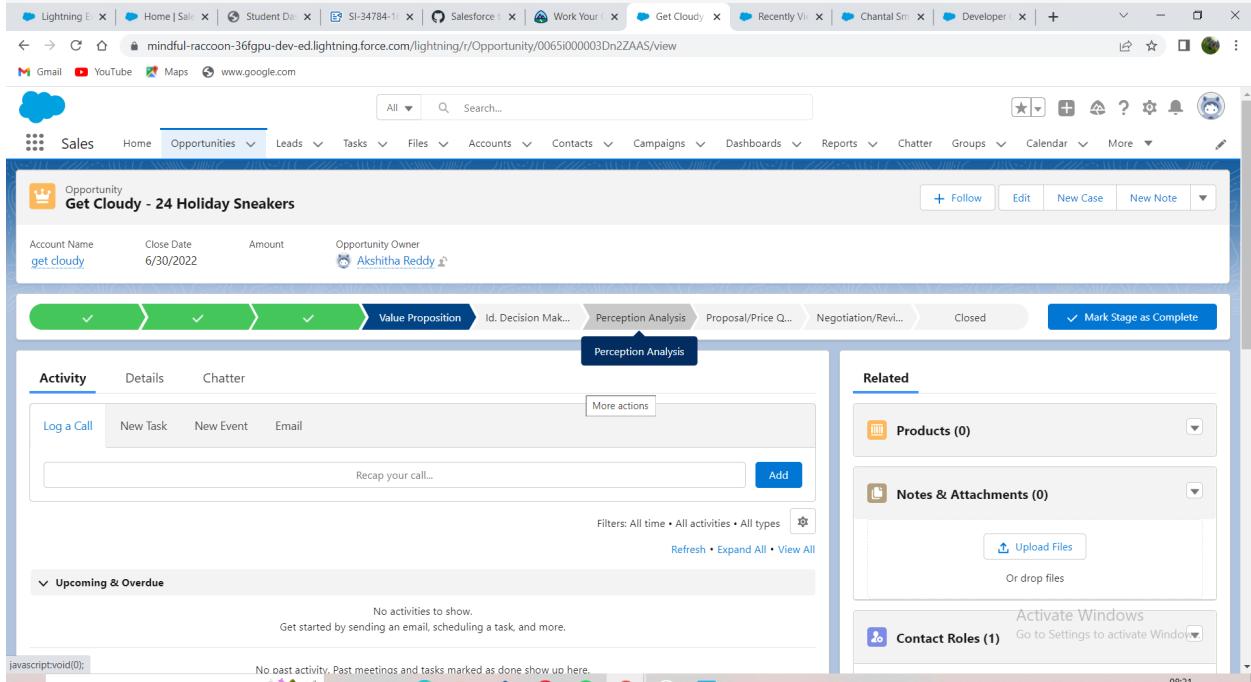
Go to Settings to activate Windows.

22°C Cloudy 09:50 28-06-2022

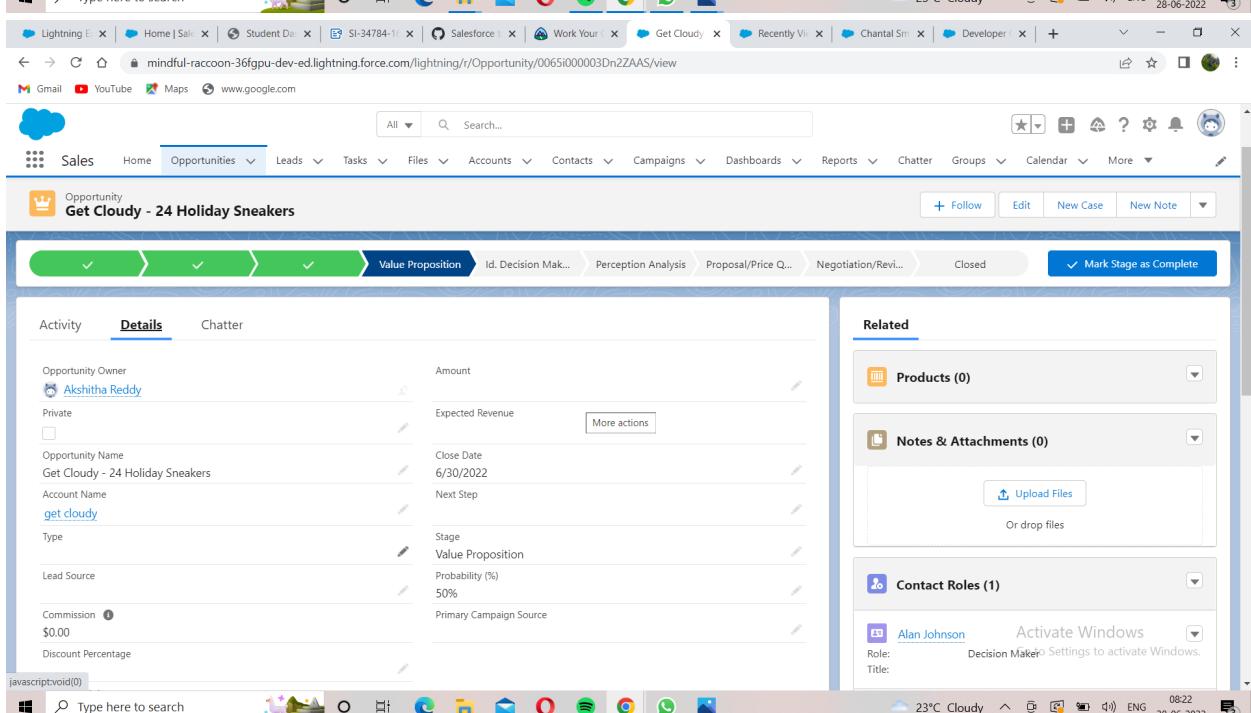
Leads & Opportunities for Lightning Experience

Create and Convert Leads as Potential Customers

Work Your Opportunities



The screenshot shows the Salesforce Opportunities page for an opportunity named "Get Cloudy - 24 Holiday Sneakers". The opportunity details include Account Name: "get cloudy", Close Date: "6/30/2022", and Opportunity Owner: "Akshitha Reddy". The current stage is "Perception Analysis". The sidebar shows sections for Activity, Details, Chatter, and Related. The Related section lists "Products (0)", "Notes & Attachments (0)", and "Contact Roles (1)" (Alan Johnson, Decision Maker). The bottom status bar shows the date as 28-06-2022.



The screenshot shows the same Salesforce Opportunities page, but the "Details" tab is now selected. The detailed information includes Opportunity Owner: "Akshitha Reddy", Amount: "Expected Revenue", Close Date: "6/30/2022", Stage: "Value Proposition", and Lead Source: "Primary Campaign Source". The sidebar and status bar remain the same as the previous screenshot.

The screenshot shows a Salesforce Opportunity record for 'Get Cloudy - 24 Holiday Sneakers'. The record details include:

- Opportunity Owner:** Aksitha Reddy
- Amount:** \$0.00
- Expected Revenue:** \$0.00
- Close Date:** 6/30/2022
- Next Step:** Not specified
- Stage:** Value Proposition
- Probability (%):** 50%
- Primary Campaign Source:** Not specified
- Lead Source:** Not specified
- Commission:** \$0.00
- Discount Percentage:** Not specified
- Approval Status:** Not specified
- Order Number:** Not specified
- Current Generator(s):** Not specified
- Main Competitor(s):** Not specified
- Delivery/Installation Status:** Not specified
- Created By:** Aksitha Reddy, 6/7/2022, 7:17 AM
- Last Modified By:** Aksitha Reddy, 6/7/2022, 7:17 AM

The right sidebar contains related lists:

- Products (0)**
- Notes & Attachments (0)**
- Contact Roles (1)**
 - Alan Johnson (Decision Maker)
- Partners (0)**

At the bottom, there is a note: "Activate Windows Go to Settings to activate Windows."

Process Automation Specialist

Automate Leads

Lightning E | Home | Sales | Student D... | SI-34784-1 | Salesforce | Home | Sales | Automate | Lightning E | Lead | Sales | Lightning E | + | - | X

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Lead/ValidationRules/03d5h000000LQKmAAO/view

Gmail YouTube Maps www.google.com

Setup Home Object Manager

Search Setup

Lead Validation Rule

Validation Rule Detail

Rule Name	CheckIfUSOrNotO	Active	
Error Condition Formula	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 WI WI", State)), LEN(State) <> 2, NOT(OR(Country = "US", Country = "United States")) ISBLANK(Country)))	More actions	
Error Message	We're a US-based company, and for now we can only do business in the United States. I can't do anything with international leads.	Error Location	
Description		Top of Page	
Created By	Akshitha Reddy, 6/11/2022, 12:04 PM	Modified By	Akshitha Reddy, 6/11/2022, 12:04 PM

Help for this Page

Activate Windows
Go to Settings to activate Windows.

Lightning E | Home | Sales | Student D... | SI-34784-1 | Salesforce | Home | Sales | Automate | Lightning E | Queues | Lightning E | + | - | X

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/Queues/page?address=%2Fp%2Fownr%2FQueue%2Fd%3Fid%3D00Gh0000016yjO

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Setup Home Object Manager

Search Setup

Queues

Assembly System Sales

Queue

Label	Assembly System Sales	Queue Name	Assembly_System_Sales
Queue Email		Send Email to Members	<input type="checkbox"/>
Supported Objects	Lead	Created By	Akshitha Reddy, 6/11/2022, 12:07 PM
		Modified By	Akshitha Reddy, 6/29/2022, 12:34 AM

View All Users

No members.

Activate Windows
Go to Settings to activate Windows.

Queues

Rainbow Sales

Label	Rainbow Sales	Queue Name	Rainbow_Sales
Queue Email		Send Email to Members	<input type="checkbox"/>
Supported Objects	Lead	Created By	Akshitha Reddy, 6/11/2022, 12:06 PM
		Modified By	Akshitha Reddy, 6/11/2022, 12:06 PM

No members.

Lead Assignment Rules

Rainbow Sales

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	Active <input checked="" type="checkbox"/>	
Rule Name	Rainbow Sales	Created By	Akshitha Reddy, 6/11/2022, 12:08 PM
Modified By	Akshitha Reddy, 6/11/2022, 12:12 PM		

Rule Entries

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"/>

Automates Accounts

Lightning Experience | Home | Sales | Student Dash | SI-34784-165 | Salesforce training | Home | Sales | Automate Sim | Account | Sales | Lightning Experience | + | - | X

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Account/FieldsAndRelationships/00N5h000005tulu/view

Gmail YouTube Maps www.google.com

Setup Home Object Manager

Search Setup

Help for this Page

Account Custom Field
Number of deals
Back to Account Fields

Custom Field Definition Detail

Field Information

Field Label	Number of deals
Field Name	Number_of_deals
API Name	Number_of_deals_c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	

Object Name: Account
Created By: Akshitha Reddy, 6/11/2022, 12:22 PM
Modified By: Akshitha Reddy, 6/12/2022, 1:55 AM

Roll-Up Summary Options

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

Summary Type: COUNT

Activate Windows
Go to Settings to activate Windows.

Lightning Experience | Home | Sales | Student Dash | SI-34784-165 | Salesforce training | Home | Sales | Automate Sim | Account | Sales | Lightning Experience | + | - | X

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Account/FieldsAndRelationships/00N5h000005tulz/view

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Setup Home Object Manager

Search Setup

Help for this Page

Account Custom Field
Number of won deals
Back to Account Fields

Custom Field Definition Detail

Field Information

Field Label	Number of won deals
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	

Object Name: Account
Created By: Akshitha Reddy, 6/11/2022, 12:24 PM
Modified By: Akshitha Reddy, 6/12/2022, 1:55 AM

Roll-Up Summary Options

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

Summary Type: COUNT

Activate Windows
Go to Settings to activate Windows.

Lightning Experience | Home | Sales | Student Dash | SI-34784-165 | Salesforce training | Home | Sales | Automate Sim | Account | Sales | Lightning Experience | + | - | X

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Account/FieldsAndRelationships/00N5h000005tum4/view

Gmail YouTube Maps www.google.com

Setup Home Object Manager

Search Setup

Help for this Page

Account Custom Field
Last won deal date
Back to Account Fields

Custom Field Definition Detail

Field Information

Field Label	Last won deal date
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 Akshitha Reddy, 6/11/2022, 12:25 PM Modified By Akshitha Reddy, 6/12/2022, 1:55 AM

Roll-Up Summary Options

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

Summary Type MAX

Activate Windows
Go to Settings to activate Windows.

Type here to search

29°C Haze 08:42 28-06-2022 ENG

Lightning Experience | Home | Sales | Student Dash | SI-34784-165 | Salesforce training | Home | Sales | Automate Sim | Account | Sales | Lightning Experience | + | - | X

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Account/FieldsAndRelationships/00N5h000005tumE/view

Gmail YouTube Maps www.google.com

Setup Home Object Manager

Search Setup

Help for this Page

Account Custom Field
Amount of won deals
Back to Account Fields

Custom Field Definition Detail

Field Information

Field Label	Amount of won deals
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 Akshitha Reddy, 6/11/2022, 12:30 PM Modified By Akshitha Reddy, 6/12/2022, 1:55 AM

Roll-Up Summary Options

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

Summary Type SUM

Activate Windows
Go to Settings to activate Windows.

Type here to search

29°C Haze 08:42 28-06-2022 ENG

Lightning Experience | Home | Sales | Student Dashboard | SI-34784-165 | Salesforce training | Home | Sales | Automate Sim | Account | Sales | Lightning Experience | + | - | X

curious-unicorn-o1anas-dev.lightning.force.com/lightning/setup/ObjectManager/Account/FieldsAndRelationships/00N5h000005tum9/view

Gmail YouTube Maps www.google.com

Setup Home Object Manager

Object Manager > Account

Deal win percent

Custom Field Definition Detail

Field Information

Field Label	Deal win percent
Field Name	Deal__win_percent
API Name	Deal__win_percent__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	

Object Name: Account

Created By: Akshitha Reddy, 6/11/2022, 12:29 PM

Modified By: Akshitha Reddy, 6/11/2022, 12:29 PM

Formula Options

Data Type	Formula
Decimal Places	2
Number_of_won_deals_c	

Activate Windows
Go to Settings to activate Windows.

Lightning Experience | Home | Sales | Student Dashboard | SI-34784-165 | Salesforce training | Home | Sales | Automate Sim | Account | Sales | Lightning Experience | + | - | X

curious-unicorn-o1anas-dev.lightning.force.com/lightning/setup/ObjectManager/ValidationRules/03d5h000000LQLVAA4/view

Gmail YouTube Maps www.google.com

Setup Home Object Manager

Object Manager > Account

Account Validation Rule

Validation Rule Detail

Rule Name	ValidationForBilling
Error Condition Formula	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,MT,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)), LEN(BillingState) > 2, NOT(OR(BillingCountry = "USA", BillingCountry = "Other", ISBLANK(BillingCountry))), NOT(CONTAINS("AL,AK,AZ,AR,CA,CO,CT,DE,DC,FL,GA,HI,ID,IL,IN,IA,KS,KY,LA,ME,MD,MA,MT,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,WY", ShippingState)), LEN(ShippingState) < 2, NOT(OR(ShippingCountry = "US", ShippingCountry = "Other", ShippingCountry = "United States", ISBLANK(ShippingCountry))))
Error Message	You have to 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.
Description	
Created By	Akshitha Reddy, 6/11/2022, 10:42 PM

Error Location: Top of Page

Modified By: Akshitha Reddy, 6/23/2022, 11:35 AM

Activate Windows
Go to Settings to activate Windows.

Lightning Experience | Home | Sales | Student Dash | SI-34784-165 | Salesforce training | Home | Sales | Automate Setup | Account | Sales | Lightning Experience | + | - | X

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Account/ValidationRules/03d5h000000QLaAO/view

Gmail YouTube Maps www.google.com

Account Validation Rule

Validation Rule Detail

Rule Name: ValidationForType
ValidationForType: Active

Error Condition Formula: ISCHANGED(Name) && (OR(ISPICKVAL(Type, 'Customer - Direct'), ISPICKVAL(Type, 'Customer - Channel')))

Error Message: If the account type is either "Customer - Channel" or "Customer - Direct", we don't want anybody to change the name.

Description: Created By: Akshitha Reddy, 6/11/2022, 10:50 PM
Modified By: Akshitha Reddy, 6/23/2022, 11:35 AM

Help for this Page

Activate Windows
Go to Settings to activate Windows.

Lightning Experience | Home | Sales | Student Dash | SI-34784-165 | Salesforce training | Home | Sales | Automate Setup | Account | Sales | Lightning Experience | + | - | X

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ObjectManager/FieldsAndRelationships/00N5h000005tumI/view

Gmail YouTube Maps www.google.com

Account Custom Field

Call for Service

Custom Field Definition Detail

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: Akshitha Reddy, 6/11/2022, 12:35 PM
Modified By: Akshitha Reddy, 6/11/2022, 10:22 PM

Object Name: Account

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")

Help for this Page

Activate Windows
Go to Settings to activate Windows.

Create Robot Setup Object

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Lightning Experience, Home | Sales, Student Dash, SI-34784-165, Salesforce training, Home | Sales, Automate Sim, Robot Setup, and Lightning Experience. Below the navigation bar is a toolbar with icons for Home, Object Manager, and various setup functions. The main content area displays the 'Robot Setup' object details. On the left is a sidebar with a 'Details' tab selected, listing categories like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The right panel shows the 'Details' section for the 'Robot Setup' object, which has an API Name of 'Robot_Setup__c'. It includes fields for Description, API Name, Custom (set to 'Custom'), Singular Label ('Robot Setup'), Plural Label ('Robot Setup'), Enable Reports, Track Activities, Track Field History, Deployment Status ('Deployed'), Help Settings, and Standard salesforce.com Help Window. A note at the bottom right says 'Activate Windows' and 'Go to Settings to activate Windows.' The bottom of the screen shows the Windows taskbar with various pinned apps.

This screenshot shows the creation of a custom field within the 'Robot Setup' object. The top navigation bar and toolbar are identical to the previous screenshot. The main content area shows the 'Fields & Relationships' tab selected in the sidebar. The right panel displays the 'Custom Field Definition Detail' for a field named 'Notes'. The 'Field Information' section shows the field label as 'Notes', field name as 'Notes', API name as 'Notes__c', object name as 'Robot Setup', and data type as 'Text'. The 'General Options' section includes settings for Required (unchecked), Unique (unchecked), Case Sensitive (unchecked), External ID (unchecked), and Default Value (empty). A note at the bottom right says 'Activate Windows' and 'Go to Settings to activate Windows.' The bottom of the screen shows the Windows taskbar.

Lightning Experience | Home | Salesforce | Student Dashboards | SI-34784-165 | Salesforce training | Home | Salesforce | Automate Setup | Robot Setup | Lightning Experience | + | - | X

curious-unicorn-a1anas-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5h000000R6Ou/FieldsAndRelationships/00N5h000005tvQV/view

Gmail YouTube Maps www.google.com

Setup Home Object Manager

Search Setup

Robot Setup

Notes

Field Name	Description	Object Name	Data Type
Notes	Help Text Data Owner Field Usage Data Sensitivity Level Compliance Categorization	Notes	Text

Created By Akshitha Reddy, 6/11/2022, 10:58 PM Modified By Akshitha Reddy, 6/11/2022, 10:58 PM

General Options

Required Unique Case Sensitive External ID Default Value

Text Options Length 100

Validation Rules New No validation rules defined.

Activate Windows Go to Settings to activate Windows.

Always show me more records per related list

Back To Top

Type here to search

29°C Haze 08:52 28-06-2022

Lightning Experience | Home | Salesforce | Student Dashboards | SI-34784-165 | Salesforce training | Home | Salesforce | Automate Setup | Robot Setup | Lightning Experience | + | - | X

curious-unicorn-a1anas-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5h000000R6Ou/FieldsAndRelationships/00N5h000005tvQV/view

Gmail YouTube Maps www.google.com

Setup Home Object Manager

Search Setup

Robot Setup

Robot Setup Custom Field Date

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

Field Information

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

Created By Akshitha Reddy, 6/11/2022, 10:57 PM Modified By Akshitha Reddy, 6/11/2022, 10:57 PM

General Options

Required Default Value

Validation Rules New No validation rules defined.

Activate Windows Go to Settings to Validation Rules Help

Type here to search

29°C Haze 08:51 28-06-2022

Lightning Experience | Home | Salesforce | Student Dashboard | SI-34784-165 | Salesforce training | Home | Salesforce | Automate Setup | Lightning Experience | + | - | X

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5h000000R6Ou/FieldsAndRelationships/00N5h000005tv0k/view

Gmail YouTube Maps www.google.com

Setup Home Object Manager

Robot Setup

SETUP > OBJECT MANAGER Robot Setup

Details

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

Robot Setup Custom Field
Day of the week

Back to Robot Setup

Custom Field Definition Detail

Edit Set Field Level Security View Field Accessibility Where is this used?

Field Information

Field Label: Day of the week
Field Name: Day_of_the_week
API Name: Day_of_the_week_c

Object Name: Robot Setup

Description: Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization

Created By: Akshitha Reddy, 6/11/2022, 11:12 PM
Modified By: Akshitha Reddy, 6/11/2022, 11:12 PM

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))
```

Activate Windows
Go to Settings to activate Windows.

Lightning Experience | Home | Salesforce | Student Dashboard | SI-34784-165 | Salesforce training | Home | Salesforce | Automate Setup | Lightning Experience | + | - | X

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5h000000R6Ou/FieldsAndRelationships/00N5h000005tv0k/view

Gmail YouTube Maps www.google.com

Setup Home Object Manager

Robot Setup

SETUP > OBJECT MANAGER Robot Setup

Details

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

Robot Setup Custom Field
Day of the week

Back to Robot Setup

Custom Field Definition Detail

Edit Set Field Level Security View Field Accessibility Where is this used?

Field Information

Field Label: Day of the week
Field Name: Day_of_the_week
API Name: Day_of_the_week_c

Object Name: Robot Setup

Description: Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization

Created By: Akshitha Reddy, 6/11/2022, 11:12 PM
Modified By: Akshitha Reddy, 6/11/2022, 11:12 PM

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))
```

Activate Windows
Go to Settings to activate Windows.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Fields & Relationships' and includes options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, and Triggers. The main content area is titled 'Robot Setup Custom Field Opportunity' and shows the 'Custom Field Definition Detail' for the 'Opportunity' field. The field label is 'Opportunity', field name is 'Opportunity', and API name is 'Opportunity__c'. The object name is 'Robot Setup' and the data type is 'Master-Detail'. The field is described as a Help Text field owned by 'Robot Setup'. It has a created date of 6/11/2022, 11:00 PM and modified by 'Akshitha Reddy' at the same time. The 'Master-Detail Options' section shows it is related to 'Opportunity' and 'Robot Setup' with a sharing setting of 'ReadWrite'. A note indicates it allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records. The status bar at the bottom shows it's 29°C Haze, 08:53, ENG, 28-06-2022.

Creates Sales Process and Validation Opportunities

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous one. The main content area is titled 'Opportunity Custom Field Approved' and shows the 'Custom Field Definition Detail' for the 'Approved' field. The field label is 'Approved', field name is 'Approved', and API name is 'Approved__c'. The object name is 'Opportunity' and the data type is 'Checkbox'. The field is described as a Help Text field owned by 'Opportunity'. It has a created date of 6/12/2022, 1:34 AM and modified by 'Akshitha Reddy' at the same time. The 'General Options' section shows the default value is 'Unchecked'. The 'Field Dependencies' section indicates 'No dependencies defined'. A note at the bottom says 'Activate Windows' and 'Go to Settings to activate Windows'. The status bar at the bottom shows it's 29°C Haze, 09:08, ENG, 28-06-2022.

Sales Processes

RB Robotics Sales Process

Select a stage from the Available Values list and add it to the Selected Values list to include it in the sales process. Note that removing a stage from the picklist does not remove it from any existing records.

Opportunity Stages

Sales Process: RB Robotics Sales Process
Namespace Prefix: Description:

Available 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)

Selected Values

- Needs Analysis (Open, 20%, Pipeline)
- Value Proposition (Open, 50%, Pipeline)
- Id. Decision Makers (Open, 60%, Pipeline)
- Perception Analysis (Open, 70%, Pipeline)
- Awaiting Approval (Open, 100%, Pipeline)

Add Remove

Activate Windows
Go to Settings to activate Windows.

SETUP > OBJECT MANAGER

Opportunity

Opportunity Validation Rule

Validation Rule Detail

Rule Name: ValidationForHighValue

Error Condition Formula: if(Amount > 1000 & Approved__c = false & ispickval(StageName,"Closed Won")) true; false

Error Message: You cannot pass the validation.

Description: Aksitha Reddy, 6/12/2022, 1:44 AM

Active:

Error Location: Top of Page

Created By: Aksitha Reddy

Modified By: Aksitha Reddy, 6/23/2022, 11:35 AM

Activate Windows
Go to Settings to activate Windows.

Automate Opportunities

Lightning Experience | Home | Sales | Student Dashboard | SI-34784-165 | Salesforce training | Home | Sales | Automate Sim | Approval Processes | Lightning Experience | + | - | X

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04a5h000000L7TY

Gmail YouTube Maps www.google.com

Setup Home Object Manager

Search Setup

Approval Processes

Opportunity: prospect2

Process Definition Detail

Process Name	prospect2	Active	✓
Unique Name	prospect2	Next Automated Approver Determined By	Manager of Record Owner
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			
Initial Submitters	User: Nushi Davoud, Opportunity Owner		
Created By	Akshitha Reddy, 6/12/2022, 2:34 AM	Modified By	Akshitha Reddy, 6/23/2022, 10:52 AM

Initial Submission Actions

Action	Type	Description
Record Lock	Field Update	Lock the record from being edited
Field Update	Field Update	FieldUpdate

Approval Steps

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

Final Approval Actions

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

Final Rejection Actions

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

Recall Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Activate Windows

Go to Settings to activate Windows.

javascript:srcUp(%27%2F04a5h000000L7TY%3Fisotp%3Dp1%27);

Type here to search

22°C Cloudy 09:15 28-06-2022

Lightning Experience | Home | Sales | Student Dashboard | SI-34784-165 | Salesforce training | Home | Sales | Automate Sim | Approval Processes | Lightning Experience | + | - | X

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04a5h000000L7TY

Gmail YouTube Maps www.google.com

Setup Home Object Manager

Search Setup

Approval Processes

Opportunity: prospect2

Process Definition Detail

Process Name	prospect2	Active	✓
Unique Name	prospect2	Next Automated Approver Determined By	Manager of Record Owner
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			
Initial Submitters	User: Nushi Davoud, Opportunity Owner		
Created By	Akshitha Reddy, 6/12/2022, 2:34 AM	Modified By	Akshitha Reddy, 6/23/2022, 10:52 AM

Initial Submission Actions

Action	Type	Description
Record Lock	Field Update	Lock the record from being edited
Field Update	Field Update	FieldUpdate

Approval Steps

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

Final Approval Actions

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

Final Rejection Actions

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

Recall Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Activate Windows

Go to Settings to activate Windows.

Always show me more records per related list.

22°C Cloudy 09:15 28-06-2022

Screenshot of the Salesforce Process Builder interface showing two configurations for an opportunity process.

Top Configuration:

- Object:** Opportunity
- Start:** Opportunity
- Decision:** Custom account
 - True Path:** IMMEDIATE ACTIONS → emailAlerts → STOP
 - False Path:** Prospect Account → IMMEDIATE ACTIONS → emailAlerts → STOP
- Advanced Start Options:**
 - only when a record is created
 - when a record is created or edited

Bottom Configuration:

- Object:** Opportunity
- Start:** Opportunity
- Decision:** Custom account
 - True Path:** IMMEDIATE ACTIONS → emailAlerts → STOP
 - False Path:** Prospect Account → IMMEDIATE ACTIONS → emailAlerts → STOP
- Criteria Name:** Custom account
- Criteria for Executing Actions:**
 - Conditions are met
 - Formula evaluates to true
 - No criteria—just execute the actions!
- Set Conditions:**

Field*	Operator*	Type*	Value*
[Opportunity].A... Q	Equals	Picklist	Customer - Direct
[Opportunity].A... Q	Does not equal	Global Constant	\$GlobalConstantName

Student Dashboard | Automate Simple Business Proc | Lightning Experience | Salesforce | Process Builder | Salesforce

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ProcessAutomation/home

Setup Home Object Manager

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with Process Builder—and more! Salesforce plans to retire Process Builder and recommends building automation in Flow Builder. Tell Me More Try Flow Builder

Process Builder - opportunityprocess

View All Processes Clone View Properties Deactivate Read Only

START → Opportunity → Decision (Custom account) → TRUE: IMMEDIATE ACTIONS (emailAlerts) → STOP

Decision (Prospect Account) → TRUE: IMMEDIATE ACTIONS (emailAlerts) → STOP

Activate Windows Go to Settings to activate Windows.

Action Name: emailAlerts
Email Alert: Finance_Account_Creation

Save Cancel

22°C Cloudy ENG 09:26 28-06-2022

Student Dashboard | Automate Simple Business Proc | Lightning Experience | Salesforce | Process Builder | Salesforce

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ProcessAutomation/home

Setup Home Object Manager

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with Process Builder—and more! Salesforce plans to retire Process Builder and recommends building automation in Flow Builder. Tell Me More Try Flow Builder

Process Builder - opportunityprocess

View All Processes Clone View Properties Deactivate Read Only

START → Opportunity → Decision (Custom account) → TRUE: IMMEDIATE ACTIONS (emailAlerts) → STOP

Decision (Prospect Account) → TRUE: IMMEDIATE ACTIONS (emailAlerts) → STOP

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!

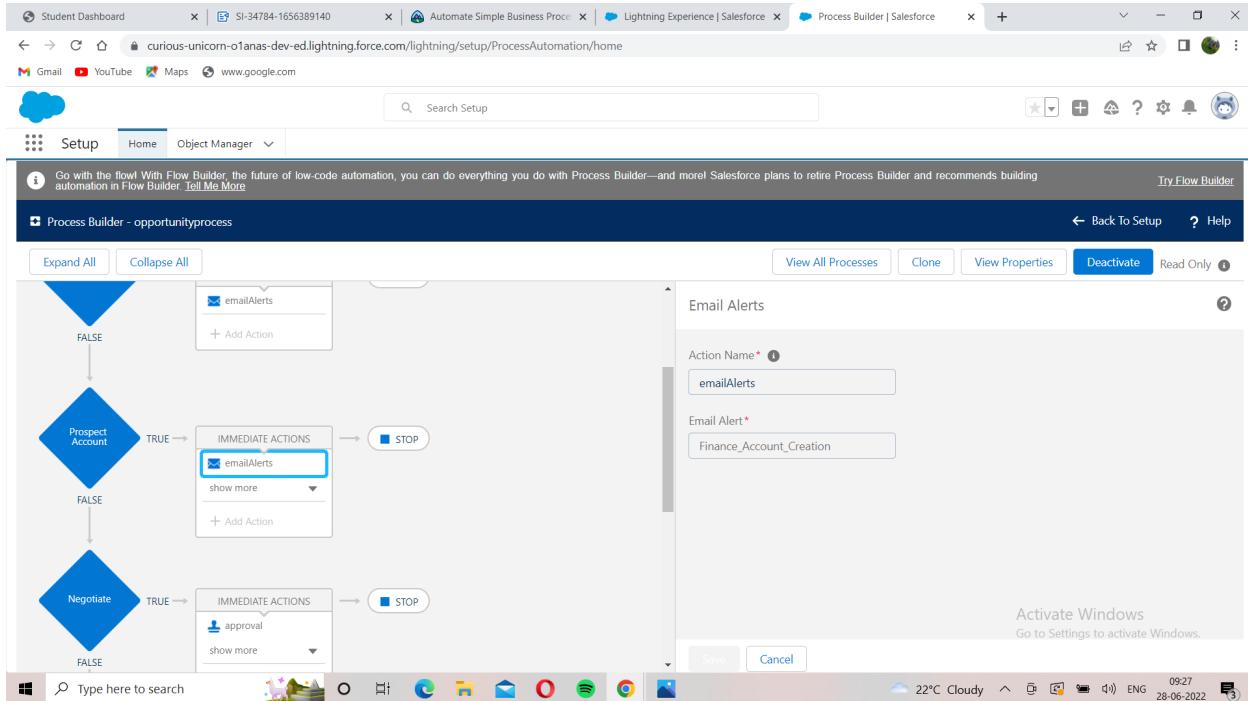
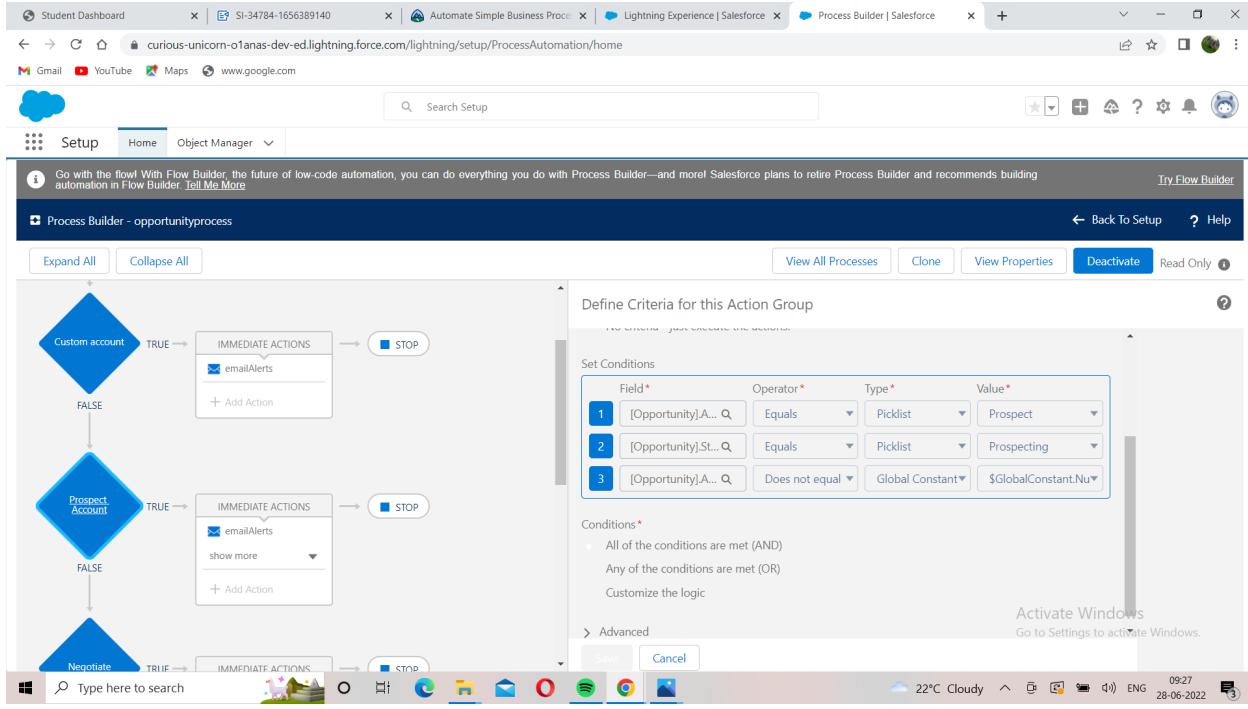
Set Conditions

Field*	Operator*	Type*	Value*
[Opportunity].A... Q	Equals	Picklist	Prospect
[Opportunity].St... Q	Equals	Picklist	Prospecting

Activate Windows Go to Settings to activate Windows.

Save Cancel

22°C Cloudy ENG 09:26 28-06-2022



Student Dashboard | SI-34784-1656389140 | Automate Simple Business Process | Lightning Experience | Salesforce | Process Builder | Salesforce

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ProcessAutomation/home

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Setup Home Object Manager

Search Setup

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with Process Builder—and more! Salesforce plans to retire Process Builder and recommends building automation in Flow Builder. Tell Me More

Process Builder - opportunityprocess

TRUE FALSE TRUE FALSE TRUE

```

graph TD
    PA{Prospect Account} -- TRUE --> I1[IMMEDIATE ACTIONS]
    I1 --> C1[Create Task]
    C1 --> S1[show fewer]
    S1 --> PA
    N{Negotiate} -- TRUE --> I2[IMMEDIATE ACTIONS]
    I2 --> A1[approval]
    A1 --> S2[show more]
    S2 --> N
    CW{Close won} -- TRUE --> I3[IMMEDIATE ACTIONS]
    I3 --> S3[javascript:void(0)]
    S3 --> CW
  
```

View All Processes Clone View Properties Deactivate Read Only

Create a Record

Action Name * Create Task

Record Type * Task

Set Field Values

Field *	Type *	Value *
Due Date Only	Formula	Today() + 7
Assigned To ID	Field Reference	[Opportunity].Account.....
Priority	Picklist	High
Status	Picklist	In Progress

Activate Windows Go to Settings to activate Windows.

22°C Cloudy 09:27 28-06-2022

Student Dashboard | SI-34784-1656389140 | Automate Simple Business Process | Lightning Experience | Salesforce | Process Builder | Salesforce

curious-unicorn-o1anas-dev-ed.lightning.force.com/lightning/setup/ProcessAutomation/home

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Setup Home Object Manager

Search Setup

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with Process Builder—and more! Salesforce plans to retire Process Builder and recommends building automation in Flow Builder. Tell Me More

Process Builder - opportunityprocess

TRUE FALSE TRUE FALSE TRUE

```

graph TD
    PA{Prospect Account} -- TRUE --> I1[IMMEDIATE ACTIONS]
    I1 --> C1[Create Task]
    C1 --> S1[show fewer]
    S1 --> PA
    N{Negotiate} -- TRUE --> I2[IMMEDIATE ACTIONS]
    I2 --> A1[approval]
    A1 --> S2[show more]
    S2 --> N
    CW{Close won} -- TRUE --> I3[IMMEDIATE ACTIONS]
    I3 --> S3[javascript:void(0)]
    S3 --> CW
  
```

View All Processes Clone View Properties Deactivate Read Only

Create a Record

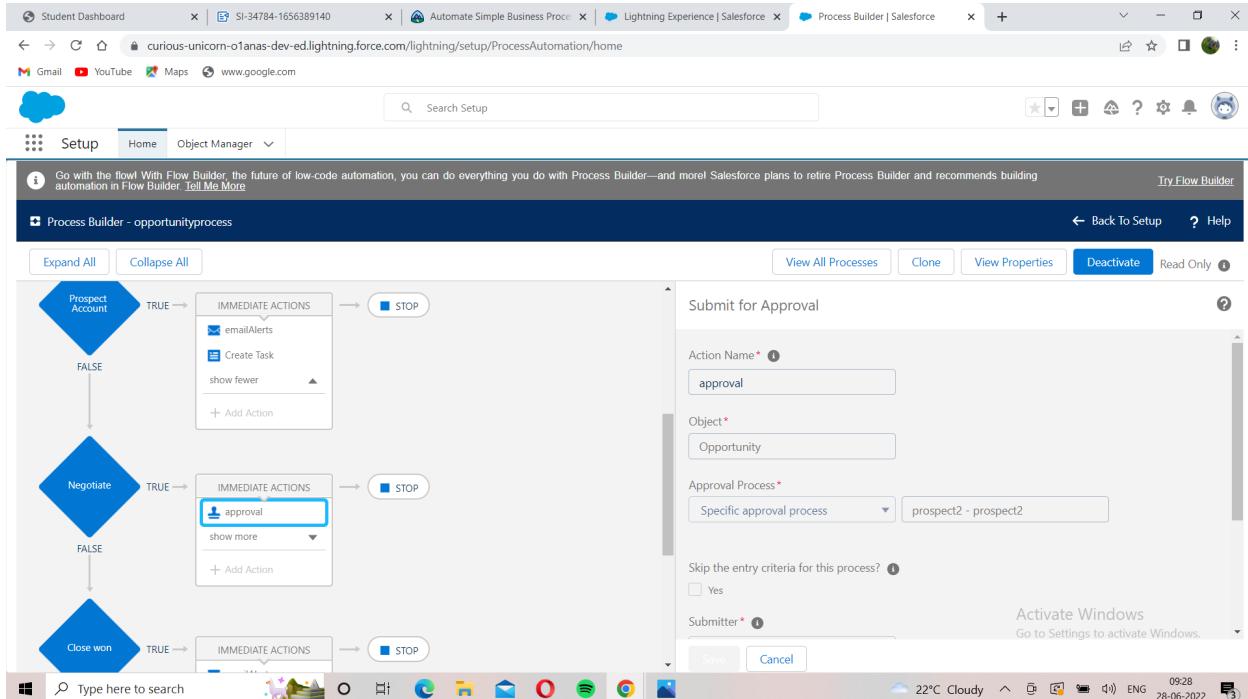
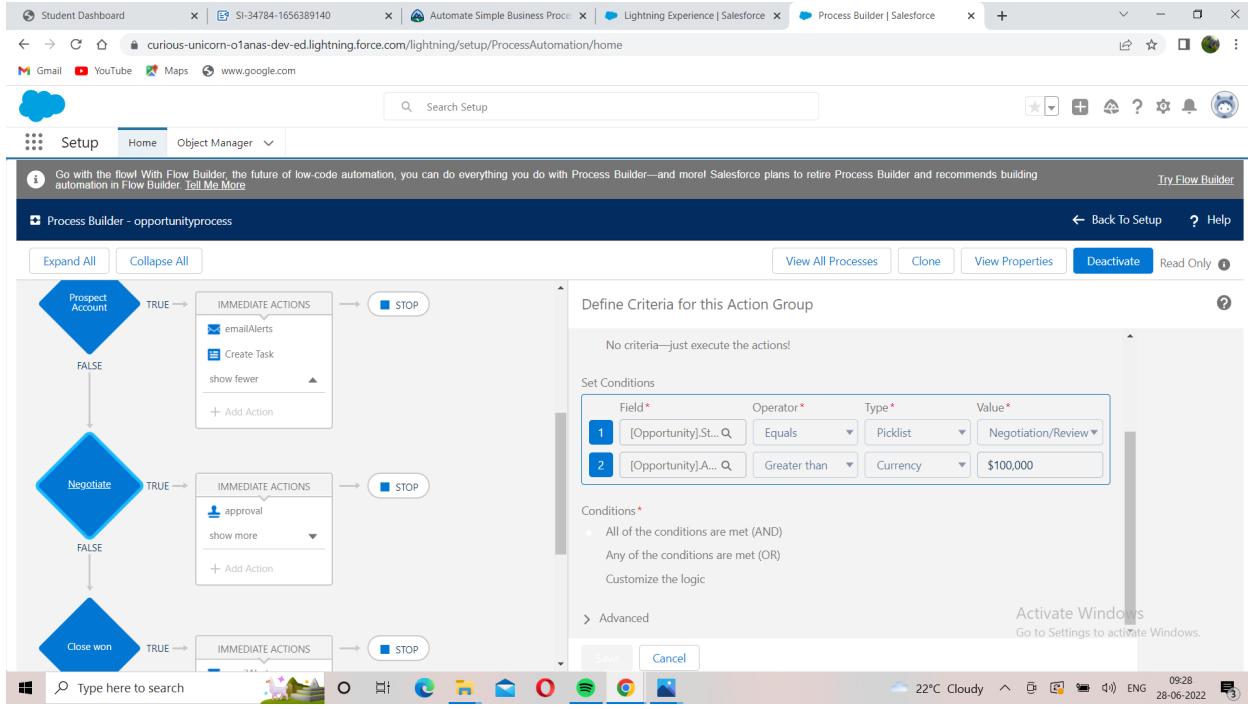
Action Name * Task

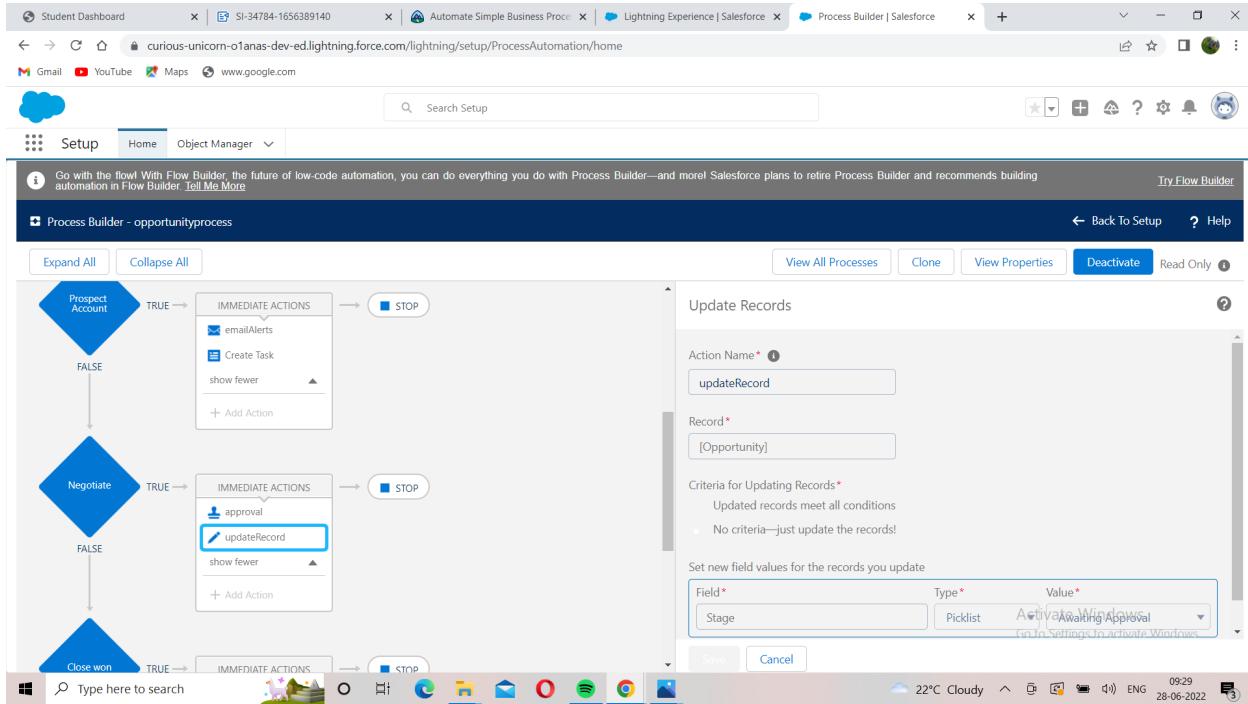
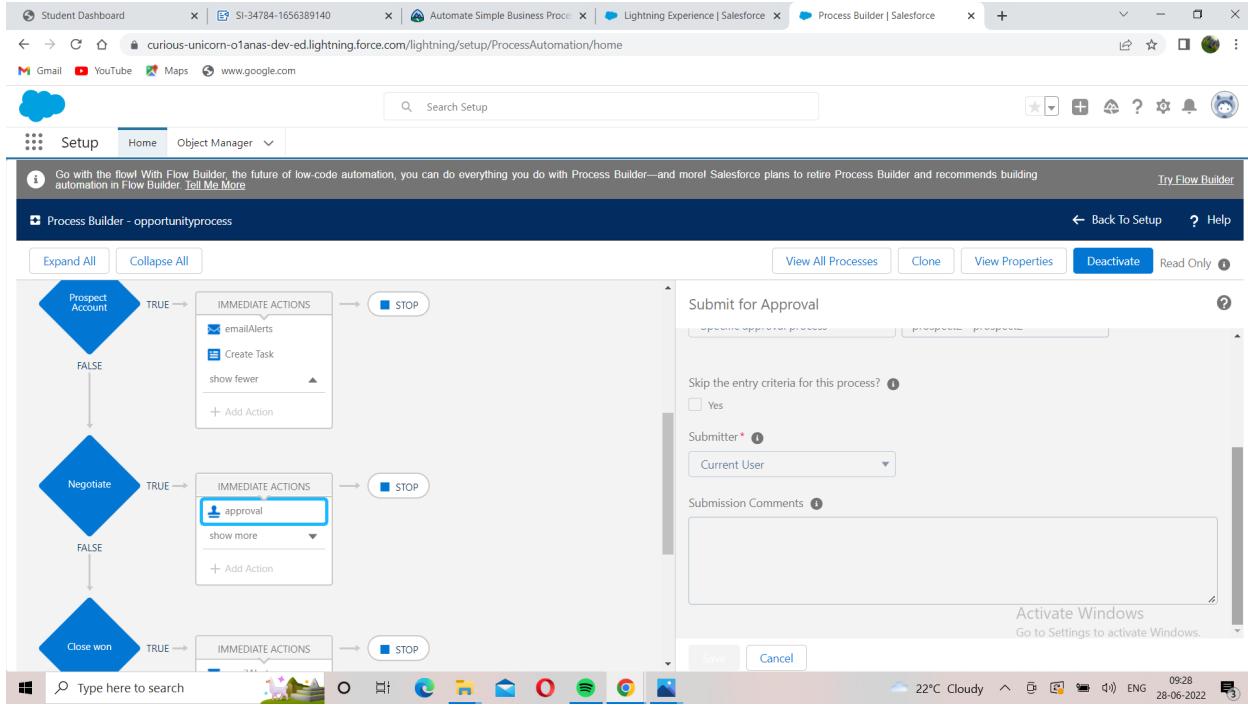
Set Field Values

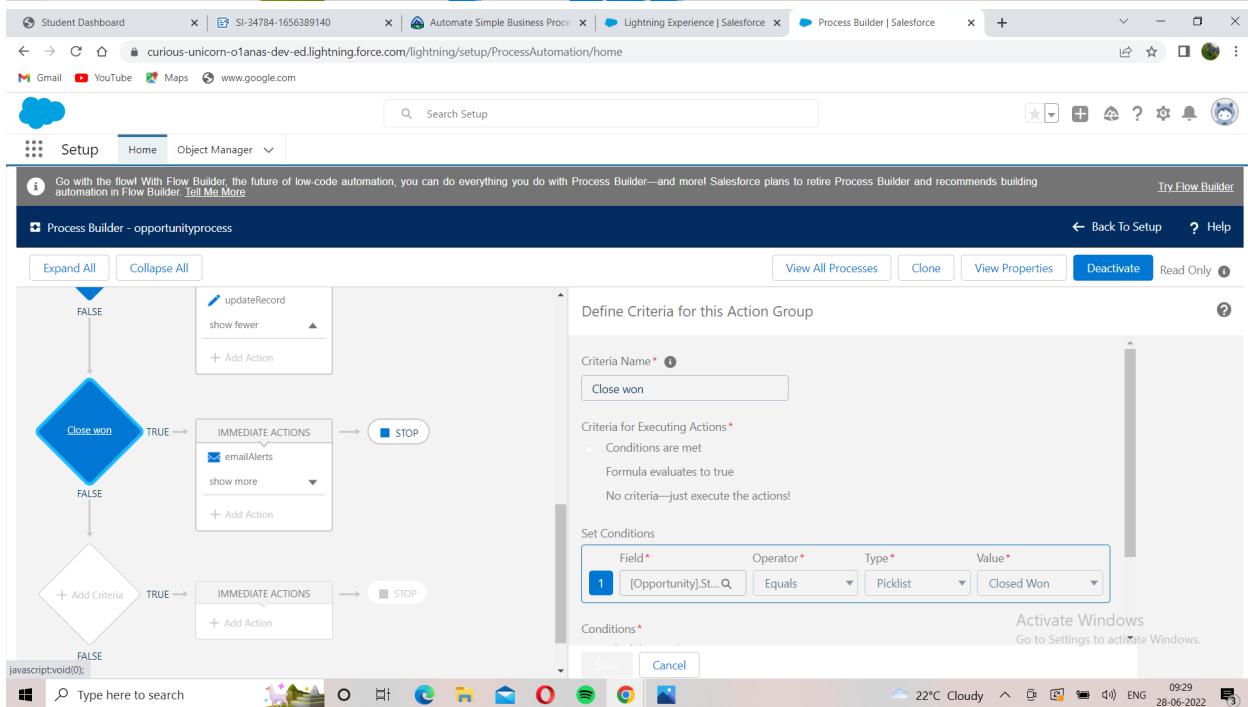
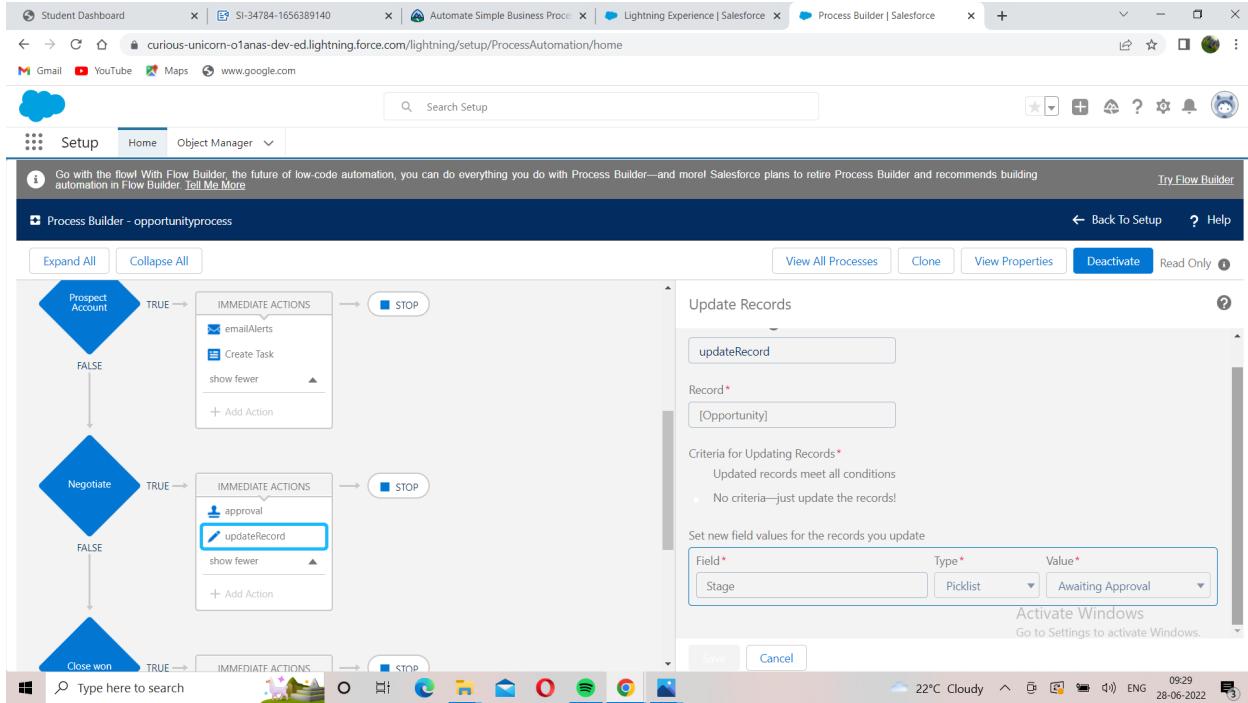
Field *	Type *	Value *
Due Date Only	Formula	Today() + 7
Assigned To ID	Field Reference	[Opportunity].Account.....
Priority	Picklist	High
Status	Picklist	In Progress
Subject	String	Send Marketing Materials
Related To ID	Field Reference	[Opportunity].Id

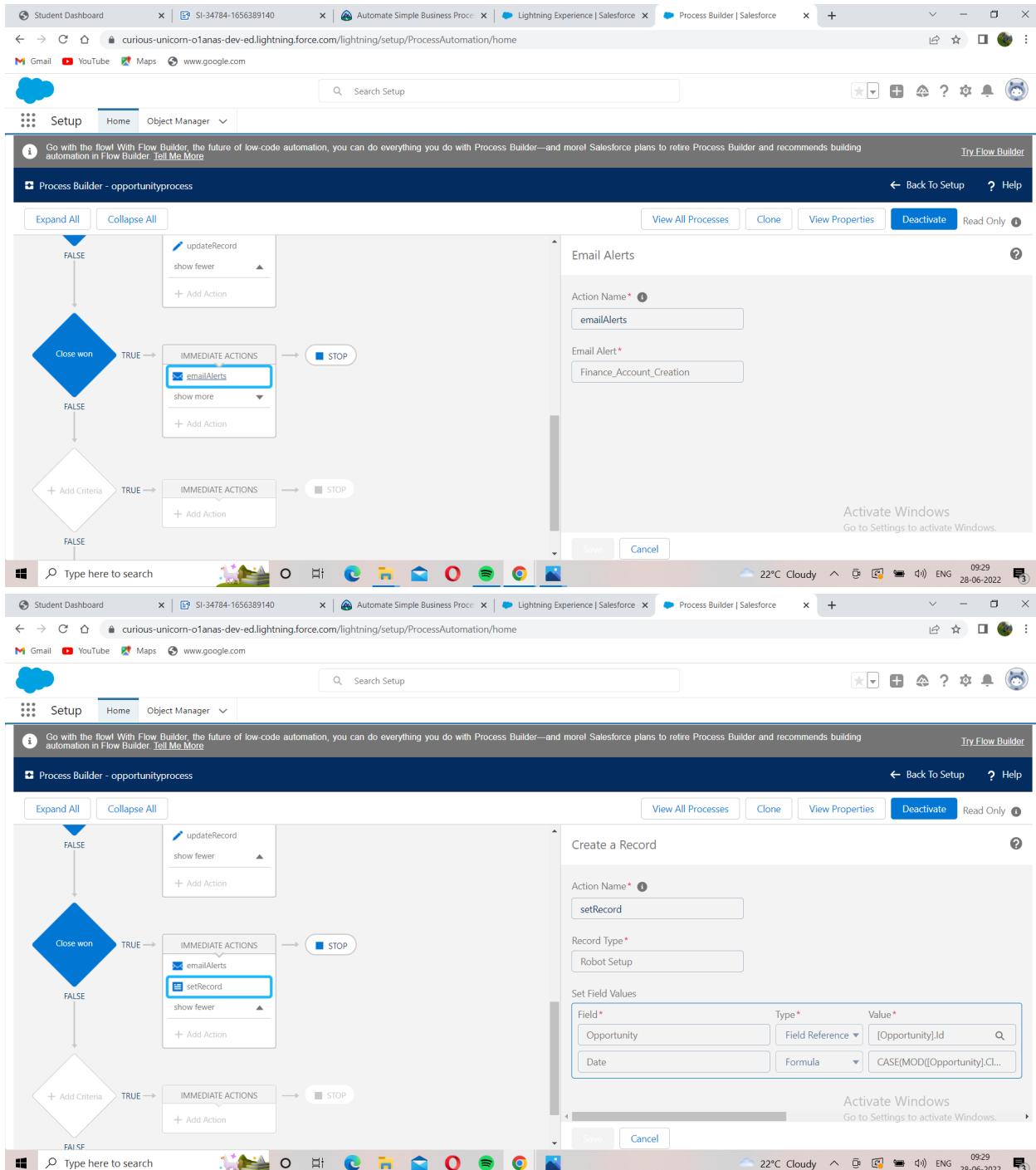
Activate Windows Go to Settings to activate Windows.

22°C Cloudy 09:27 28-06-2022

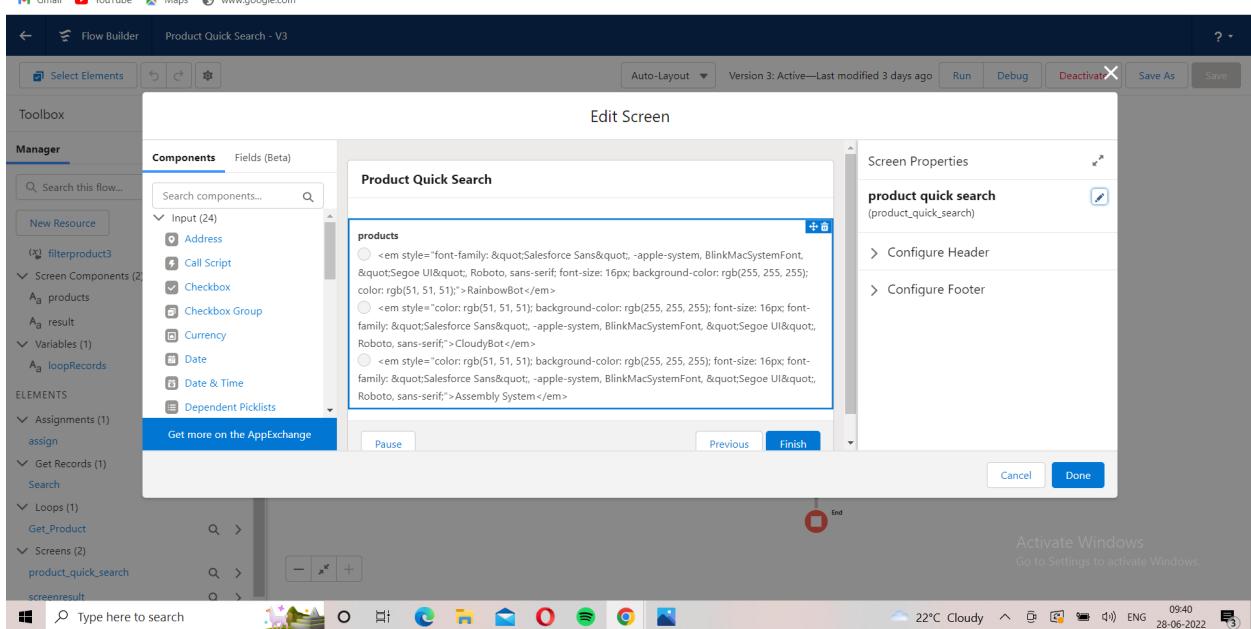
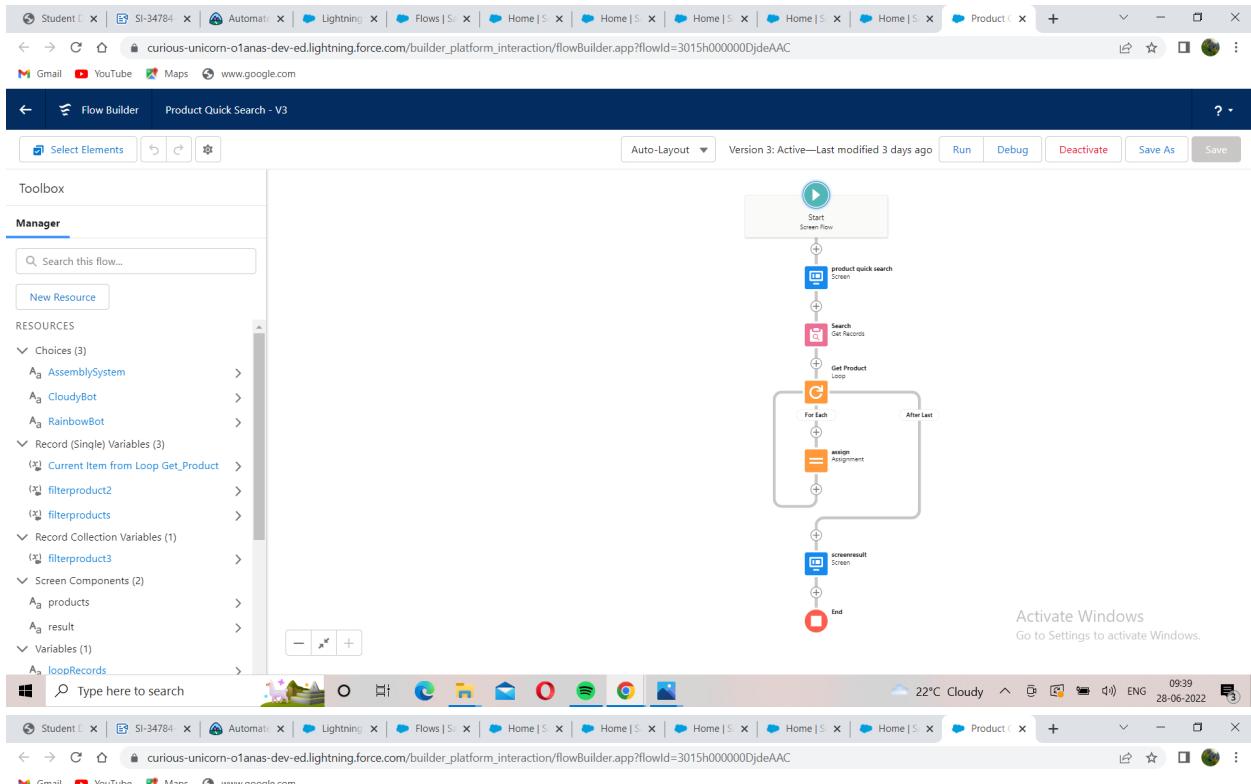


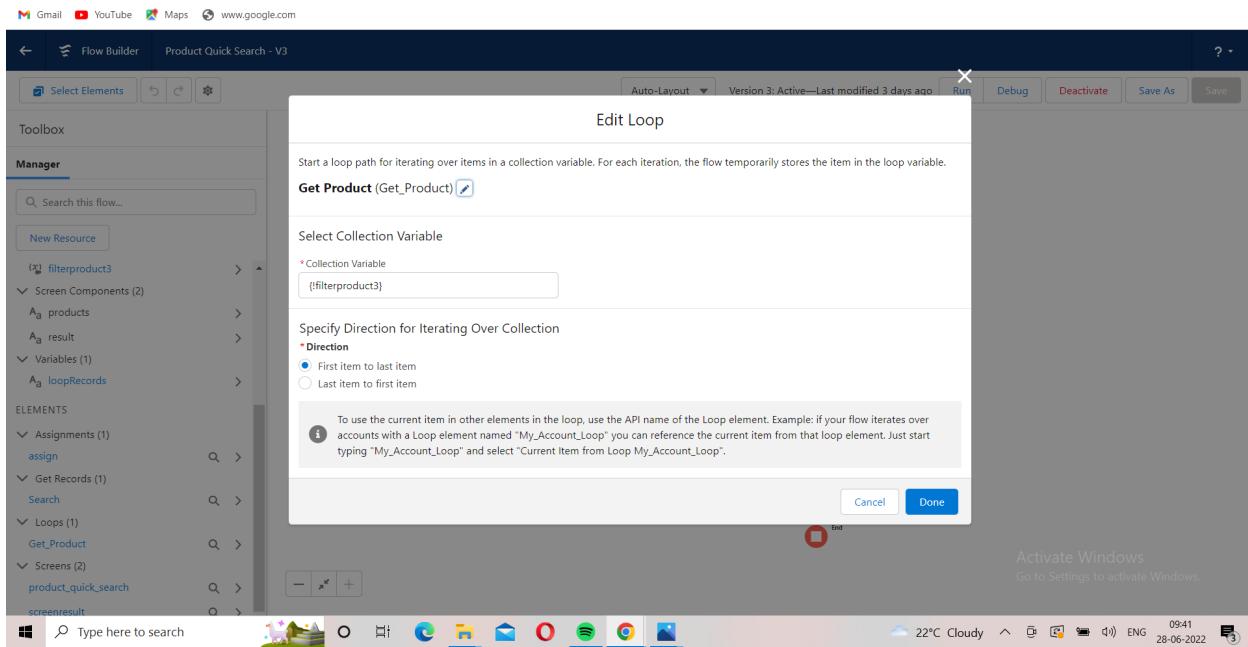
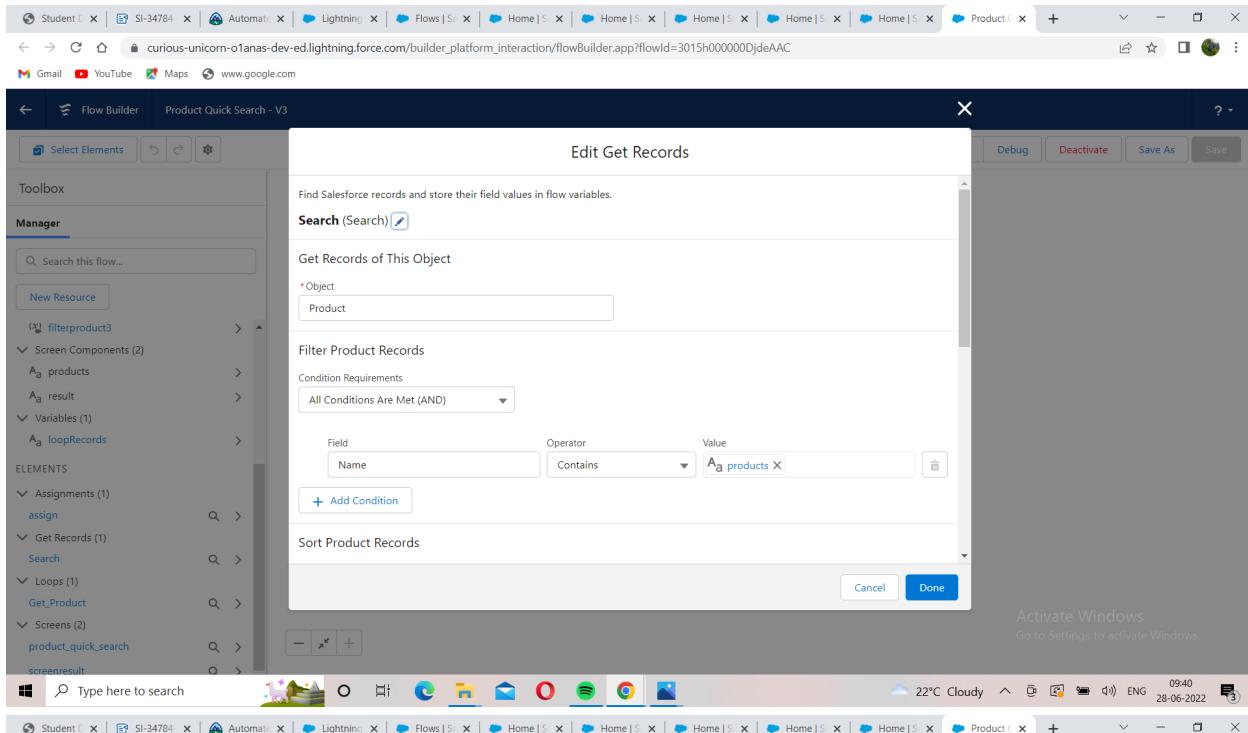


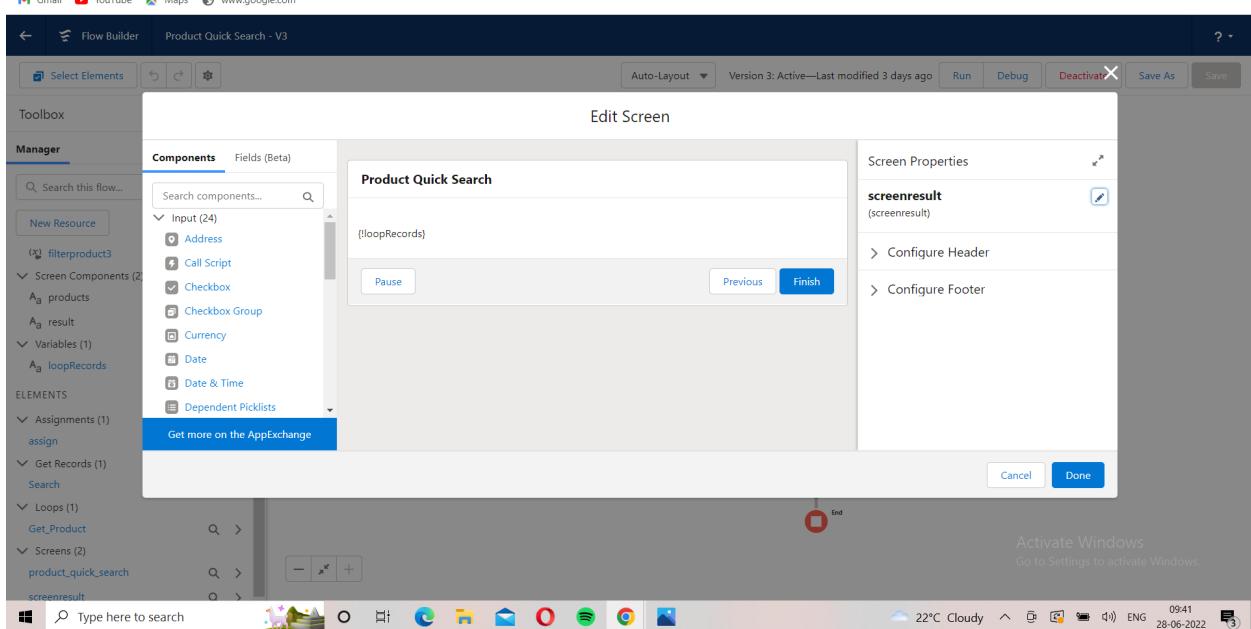
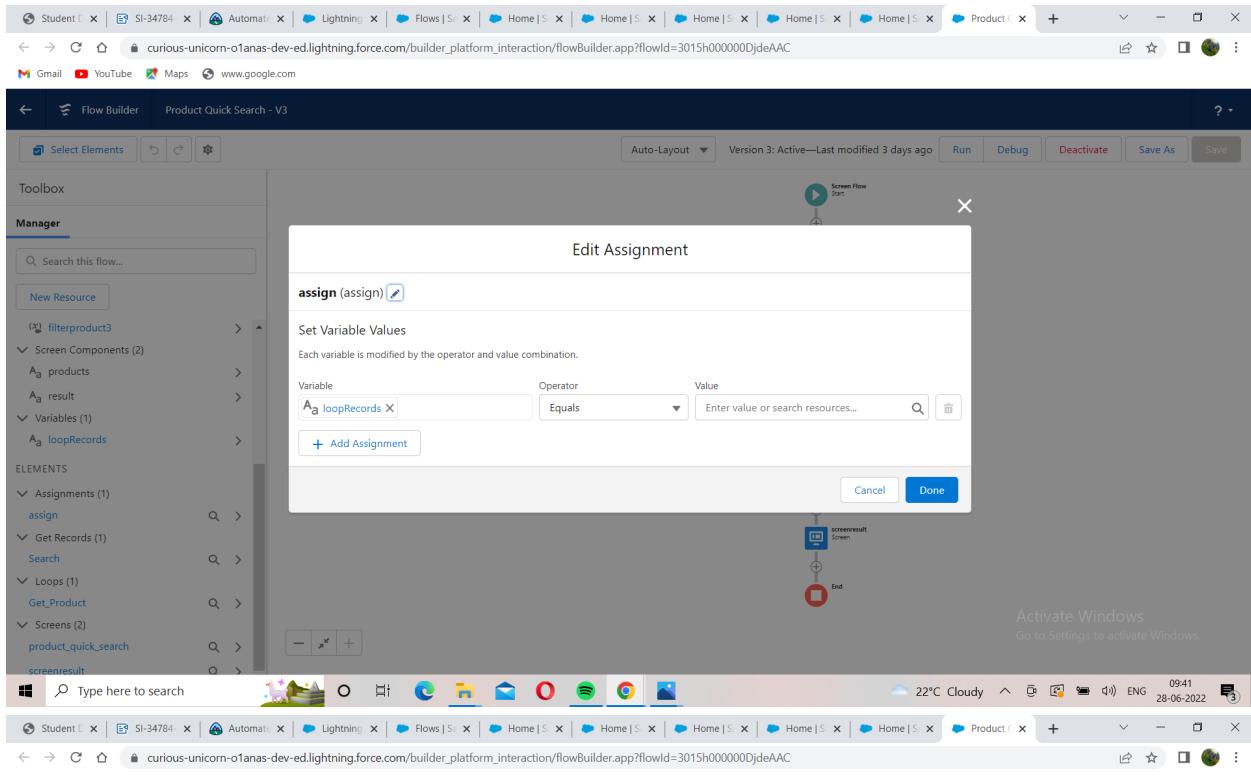




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