

PROCESS AUTOMATION SPECIALIST SUPERBADGE

Challenge 1: Automate Leads

Step-1 :

Validation rule on Lead to verify Country and State field. Lead Country must be either US, USA or United State or it can be blank. Lead State must be valid 2-digit US state.

Steps-2 :

Create Two Queues

1. Rainbow Sales.

2. Assembly System Sales.

Create an lead assignment rule and make 2 rules entries and give order accordingly. Based on LeadSource value lead should be assign to correct sales team (Queue).

```
If(LeadSource == 'Web'){
    Assign lead to Rainbow Sales Queue;
}
else if(LeadSource == 'Partner' || LeadSource == 'Purchased List'){
    Assign lead to Assembly System Sales Queue.
}
```

Challenge 2: Automate Accounts

Step-1

Validation rule on ShippingCountry and BillingCountry i.e. Shipping and Billing Country must be either US, USA, United State or it can be blank.

```
NOT (OR ( BillingCountry = 'US', BillingCountry = 'USA', BillingCountry = 'United State',
ISBLANK (BillingCountry ),
    ShippingCountry = 'US', ShippingCountry = 'USA', ShippingCountry = 'United State',
ISBLANK(ShippingCountry) )
)
```

Step-2

Validation rule on ShippingState and BillingState i.e. ShippingState and BillingState must be a valid 2-digit US state.

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

Step-3

Validation Rule on Name and Type Field i.e. Restrict user to change Account Name if Account Type picklist field value is either Customer - Direct or Customer - Channel.

```
IF(AND
    (OR( ISPICKVAL(Type, 'Customer - Direct'), ISPICKVAL(Type, 'Customer - Channel')),
    NOT(ISNEW())
    ), ISCHANGED(Name), null
)
```

Step-4

Create some Roll-up Summary and formula field on Account Object.

Note:- Roll-up summary fields can be created on master side of master-detail relationship.

Number of deals This field displays number of all deals(Opportunities) under an

account.Count(Opportunities).

Number of won deals This field display number of opportunities with stage as Closed Won under an account.Count(Opportunities) with criteria as StageName equals to 'Closed Won'.

Last won deal date This field display date of last won opportunity
MAX(ClosedDate) with criteria as StageName = 'Closed Won'.

Deal win percent Formula Field (Number of won deals / Number of deals)

Amount of won deals This field display sum of all won opportunities.
SUM (Amount) with criteria as StageName = 'Closed Won'.

Call for Service Formula (Text) display Yes/No based on formula.
Return 'Yes', if last won date is 2 year ago otherwise 'No'.
IF((TODAY() - Last_won_deal_date__c) / 365 <=2 , 'No',
'Yes')

Challenge 3: Create Robot Setup Object

This challenge is all about setting-up Robot Setup Object and create some fields on it.

Name	:- ROBOT SETUP-{0000} Starts with 0
Date	:- Date type field
Notes	:- TextArea (255)
Day of the Week	:- Formula (Text)
Opportunity	:- Master-Detail Relationship with Opportunity.

Challenge 4: Sales Process and Validate Opportunities

Steps-1

Configure Stage Picklist field :-

Prospecting
Qualification
Proposal/Price Quote
Negotiation/Review
Awaiting Approval
Closed Won
Closed Lost

Step-2

Validation rule on Amount and Approved__c i.e. prevent opportunity record being saved if amount is greater than \$10,00,00 and approved is set to false.

AND(Amount > 100000, ISPICKVAL(StageName, 'Closed Won'), Approved__c = false)

Step-3

New record type RB Robotics Process RT
New Sales Process RB Robotics Sales Process

Challenge 5: Automate Opportunities

Whenever an opportunity is created for Prospect type account

Send Email alert to Finance Group. (Integration User)
Create a Task for Account Owner.

Whenever an Opportunity is created for Customer type account

Send an Email alert to Finance Group. (Integration User)

Create an approval process with entry criteria as followed :-

Opportunity.Amount > 100000

Email Template :- SALES: Opportunity Needs Approval

Create Initial Submission Actions (Field Update) => Set Opportunity Stage to Waiting Approval.

Create Final Approval Actions (Field Update) => Set Opportunity Stage to Closed Won

Whenever Opportunity is in Negotiation/Review Stage
Submit opportunity for Approval

When deal is won i.e Opportunity stage is Closed Won

Create Robot Setup Record
Email Alert to Finance Group

Note :- Use Process Builder(PB) to setup all these automation and obviously in one PB.

Challenge 6 : Create Flow for Opportunities

In this part of challenge, we gonna create a flow which takes some input from user and will return list of Product record.

Create a User-Guided Lightning Flow.

Create three Choice type Resources and use them into Flow Screen

Choice Value:-

RainbowBot

CloudyBot

Assembly System

Use Get Record data element to get all products where name contains the options which you have selected from flow screen.

Challenge 7: Automate Setups

In this part of challenge we need to setup Robot Setup Date

If Robot Setup Date / Day Of Week is either on Saturday or Sunday, then make it to Monday.

Robot Setup Date +2, for Saturday

Robot Setup Date +1, for Sunday