Process Automation Specialist

Automate Opportunities

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Following the business requirements, create a process to alert the finance group and create tasks for account owners at appropriate times during the sales process

For the purpose of approvals, assign Nushi Davoud as your manager and make sure your approval process automatically sends requests to the opportunity owner's manager. Notify the opportunity owner when an opportunity is approved or rejected.

Use the Finance: Account Creation, SALES: Opportunity Needs Approval, and Sales: Opportunity Approval Status Email templates included in the unmanaged package for your processes

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