

Process Automation Specialist

Create Sales Process and Validate Opportunities

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Create a sales process with the required stages and name it RB Robotics Sales Process. Create a record type named RB Robotics Process RT. Add a field to the opportunity page layout as described in the business requirements and create the appropriate validation rule for high-value opportunities.

Step-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**

