

1. Automate Leads

Error Condition Formula

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

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```

2. Automate Accounts

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")
```

Validation Rule 1:

```
OR(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 ))  
,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))
),NOT(OR(BillingCountry ="US",BillingCountry ="USA",BillingCountry ="United States",
ISBLANK(BillingCountry))),
NOT(OR(ShippingCountry ="US",ShippingCountry ="USA",ShippingCountry ="United States",
ISBLANK(ShippingCountry))))
```

Validation Rule 2:

```
ISCHANGED( Name ) && ( OR( ISPICKVAL( Type ,'Customer - Direct' ),ISPICKVAL( Type ,'Customer -
Channel' ) ) )
```

Error Message:

You cannot change Account Name for "customer direct" or "customer channel"

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```

3.Create Robot Setup Object:

```
CASE( WEEKDAY( Date__c ),
1,"Sunday",
2,"Monday",
3,"Tuesday",
4,"Wednesday",
5,"Thursday",
```

```
6,"Saturday",  
Text( WEEKDAY( Date__c ) ) )
```

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```

4.Create Sales Prcess and Validate Opportunities

Validation Formula:

```
IF(( Amount > 100000 && Approved__c <> True && ISPICKVAL( StageName,'Closed Won' ) ),True,False)
```

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```

5.AUTOMATE OPPORTUNITY

FORMULA:

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