Object Name: **Reference Management Process**

Fields:

Account (Lookup to Account)

Account Owner (Lookup To User)

Company Background (Lookup to Account)

Competitors (Multi Picklist - Take Values from Same field on Opportunity)

Contact (Lookup to Contact)

Denial Reason (Long Text Area)

Description of request (Long Text Area)

Existing Vendors if applicable (Picklist - Take Values from **Vendor\_Selected\_\_c** on Opportunity)

Opportunity (Lookup to Opportunity)

Prospect/Customer (Formula - Should be from Opportunity’s **Relationship\_with\_Prospect\_\_c** field)

Recipient from Account (Lookup to User)

Reference Approval Deadline (Date)

Reference Management Process Name (Auto Number - RMP-01)

Reference objectives/key use cases (Long Text Area)

Stage (Formula - Stage from Opportunity)

Status (Picklist)

* Sent for Approval/Denial
* Verification with Contact
* Approved
* Declined

What activity do you need (Picklist)

* act as a reference
* case study or video
* media opportunities
* speak at an event
* other

Who will participate (Long Text Area)

Opportunity Component: **Search References**

Filters:

Name: Text

Country: Text

Referenceable Solution: Multi Picklist (Values should be from Opportunity’s field : **Instance\_Type\_\_c** )

Industry: Multi Picklist (Values should be from Account’s field : **Industry** )

Servicing Lead: Picklist (Values should be from Account’s field : **Servicing\_Lead\_\_c**)

Partner: Picklist (Values should be from Account’s field : **Servicing\_Partner\_\_c**)

Fields to Show for Accounts:

Name

Health

Referenceable

Country

Search Criteria:

Name: Should be matched with Name of Account

Country: User can enter multiple countries separated by **,** or **;** , it should be matched with BillingCountry of Account

Referenceable Solution: Only pick accounts that has Opportunity with same values in Intstance\_Type\_\_c as in Referenceable Solution

Industry: Should be matched with Industry field of Account

Servicing Lead: Should be matched with Servicing\_Lead\_\_c of Account

Note: If user has selected any of the filter other than Country, then we will not consider Country values in filteration.

Task When Submitting a Contact for Reference:

Subject: Verify Contact for Reference

WhoId: Selected Contact

WhatId: Reference Management Process Record

Due Date: Current+ 5 Days

Owner: Account’s Owner

Afterwards if Contact has been verified, following updates should be done to task:

Status: Completed

Description: Contact verified successfully

A new task should be created with following details:

Subject: Please send Thank You email to ““ for Approving Reference Request

WhatId: Reference Management Process Record

Due Date: Current + 1 Day

Owner: Reference Management Process Record’s Owner

If Contact has not been verified, following updates should be done to task:

Status: Completed

Description: Contact cannot be verified

Logic for Populating Account Owner and Recipient from Account:

Account Owner: Simply map owner of attached Account to RMP record

Recipient from Account: If the owner is active, then map owner, otherwise map CSM\_\_c from Account

Give a Button on Account and Contact Named: Request Reference

It will take following fields as input:

* What activity do you need
* Description of request
* Reference Approval Deadline

and will create a RMP record.

When created from account, we will only attach account to the record. But incase of Contact, contact would also be getting populated on record. Record getting created from contact would have status as “**Verification with Contact**“. For records created with these button, record type will be Advocacy Activity.

Other processes on RMP record will remain unchanged.