

Challenge 3 Steps:

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New

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Opportunity Stages Picklist Values Help

Action	Stage Name	API Name	Type	Probability	Forecast Category	Chart Colors	Modified By	
Edit Del Deactivate	Prospecting	Prospecting	Open	10%	Pipeline	Assigned dynamically		6 AM
Edit Del Deactivate	Qualification	Qualification	Open	10%	Pipeline	Assigned dynamically		6 AM
Edit Del Deactivate	Needs Analysis	Needs Analysis	Open	20%	Pipeline	Assigned dynamically		6 AM
Edit Del Deactivate	Value Proposition	Value Proposition	Open	50%	Pipeline	Assigned dynamically		6 AM
Edit Del Deactivate	Id. Decision Makers	Id. Decision Makers	Open	60%	Pipeline	Assigned dynamically		6 AM
Edit Del Deactivate	Perception Analysis	Perception Analysis	Open	70%	Pipeline	Assigned dynamically		6 AM
Edit Del Deactivate	Proposal/Price Quote	Proposal/Price Quote	Open	75%	Pipeline	Assigned dynamically		3 AM
Edit Del Deactivate	Negotiation/Review	Negotiation/Review	Open	90%	Pipeline	Assigned dynamically		3 AM
Edit Del Deactivate	Closed Won	Closed Won	ClosedWon	100%	Closed	Assigned dynamically		3 AM
Edit Del Deactivate	Closed Lost	Closed Lost	ClosedLost	0%	Omitted	Assigned dynamically		3 AM
Edit Del Deactivate	Submitted Project	Submitted Project	ClosedWon	100%	Closed	Assigned dynamically		3 AM
Edit Del Deactivate	Resubmit Project	Resubmit Project	ClosedWon	100%	Closed	Assigned dynamically		3 AM

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Opportunity Field Type

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Opportunity Type Picklist Values Help

Action	Values	API Name	Default	Chart Colors	Modified By	
Edit Del Deactivate	Existing Customer - Upgrade	Existing Customer - Upgrade	<input type="checkbox"/>	Assigned dynamically		6 AM
Edit Del Deactivate	Existing Customer - Replacement	Existing Customer - Replacement	<input type="checkbox"/>	Assigned dynamically		6 AM
Edit Del Deactivate	Existing Customer - Downgrade	Existing Customer - Downgrade	<input type="checkbox"/>	Assigned dynamically		6 AM
Edit Del Deactivate	New Customer	New Customer	<input type="checkbox"/>	Assigned dynamically		16 AM
Edit Del Deactivate	New Project	New Project	<input type="checkbox"/>	Assigned dynamically		33 AM

Inactive Values

Setup Home Object Manager

Process Builder Update Opportunity

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Opportunity

Win New Project

TRUE

IMMEDIATE ACTIONS

Post Opportunity ...

STOP

FALSE

+ Add Crite...

TRUE

IMMEDIATE ACTIONS

+ Add Action

STOP

FALSE

STOP

Define Criteria for this Action Group

Criteria Name* Win New Project

Criteria for Executing Actions*

☒ Conditions are met

☐ Formula evaluates to true

☐ No criteria—just execute the actions!

Set Conditions

	Field*	Operator*	Type*	Value*
1	[Opportunity]... Q	Equals	Picklist	New Project
2	[Opportunity]... Q	Equals	Picklist	Closed Won
3	[Opportunity]... Q	Is changed	Boolean	True

+ Add Row

Conditions*

☒ All of the conditions are met (AND)

☐ Any of the conditions are met (OR)

☐ Customize the logic

Advanced

Save Cancel Delete

Setup Home Object Manager

Process Builder - Update Opportunity

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Opportunity

Win New Project

TRUE

IMMEDIATE ACTIONS

Post Opportunity...

STOP

FALSE

+ Add Crite...

TRUE

IMMEDIATE ACTIONS

+ Add Action

STOP

FALSE

STOP

Call Apex

Action Name* Post Opportunity To PMS

Apex Class* ProjectCalloutService

Set Apex Variables

Field*	Type*	Value*
opportunityId	Field Reference	[Opportunity].Id

+ Add Row

Save Cancel Delete