Day 1 - Setup

30 November 2023

10:02

**DAY's Agenda**

**Validation Rules: -**

1. User should not be able to enter new **Customer** record without Email Id. – Using Validation

2. **Reservation** time can't be in past.

3. Status for **Customer** cannot be inactive while creating new record.

**Workflow Rules**: -

4. If no status entered while **Customer** creation, Assign status as active for **Customer**.

5. Send email to ‘**Customer** email’ on **Reservation** creation: -> we have to perform 2 actions.

a. **Customer** Email field update on **Reservation** from **Customer** Email Field

b. Email Alert

**Validation Rules: -**

**Use Case 1 :**

**User should not be able to enter new Customer record without Email Id. – Using Validation**

Requirements By The Client:

Users should not be able to enter a new Customer record without providing an Email ID.

Approach: Validation Rule:

Implement a validation rule on the Customer object in Salesforce to enforce the requirement that an Email ID must be provided when creating a new record.

Solution: Validation Rule Configuration:

Create a validation rule in Salesforce with a condition that checks if the Email field is blank. If it is, display an error message preventing the user from saving the record.

Justification: Data Integrity:

This approach ensures data integrity by enforcing the requirement that a valid Email ID must be entered for every new Customer record. It helps maintain accurate and complete customer information in the Salesforce database.

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**Use Case 2 :**

**Reservation time can't be in past.**

**Requirements by the Client:**

Requirement: Reservation time cannot be set in the past.

**Approach:** Validation Rule:

Utilize a validation rule in Salesforce to prevent users from setting a reservation time in the past.

Solution: Validation Rule Configuration:

Create a validation rule on the Reservation object, specifying a condition that checks if the Reservation Date & Time is earlier than the current date and time. If it is, display an error message to notify the user.

Justification: Prevent Data Inconsistencies:

This solution ensures the consistency and accuracy of reservation data by disallowing the entry of reservation times that have already passed. It helps maintain the integrity of the system and avoids potential issues related to outdated or incorrect reservation information.

3. Status for **Customer** cannot be inactive while creating new record.

Requirements by the Client:

Requirement: The status for a Customer cannot be set to inactive when creating a new record.

Approach: Validation Rule:

Implement a validation rule in Salesforce to enforce the condition that the status cannot be set to inactive when creating a new Customer record.

Solution: Validation Rule Configuration:

Create a validation rule on the Customer object that checks if the Status field is set to inactive when the record is being created. If it is, display an error message preventing the user from saving the record.

Justification: Data Quality Assurance:

This solution ensures the integrity of customer data by preventing the creation of new records with an inactive status. It helps maintain a consistent and accurate representation of customer statuses in the Salesforce database, reducing the risk of data inconsistencies.

**Workflow Rules**: -

4. If no status entered while **Customer** creation, Assign status as active for **Customer**.

Requirements by the Client:

If no status is entered while creating a Customer record, assign the status as active for the Customer.

Approach: Process Builder or Workflow Rule:

Utilize Process Builder or a Workflow Rule in Salesforce to automate the assignment of the status as active when no status is provided during the creation of a Customer record.

Solution:

4. Automation Configuration:

Create a Process Builder or Workflow Rule that triggers when a new Customer record is created. Set up criteria to check if the Status field is blank, and if so, automatically assign the status as active.

Justification:

4. Enhanced Data Consistency:

This solution enhances data consistency by automating the assignment of a default status (active) when users forget to enter a status during the creation of a Customer record. It ensures that all records have a valid status, reducing the chances of incomplete or inaccurate data in the Salesforce system.

5. Send email to ‘**Customer** email’ on **Reservation** creation: -> we have to perform 2 actions.

a. **Customer** Email field update on **Reservation** from **Customer** Email Field

Requirements By The Client:

Send an email to the 'Customer email' when a Reservation is created.

Perform a Customer Email field update on the Reservation from the Customer Email field.

Approach:

Workflow Rule and Email Alert:

Use a Workflow Rule to trigger an Email Alert when a Reservation is created. In the same workflow, update the Customer Email field on the Reservation from the corresponding field in the Customer record.

Solution:

Workflow Rule and Email Alert Configuration:

Configure a Workflow Rule on the Reservation object that triggers on record creation. Within the workflow, set up an Email Alert to send an email to the 'Customer email' field, and update the Customer Email field on the Reservation from the related Customer record.

Justification:

Automated Communication and Data Synchronization:

This solution automates communication by sending an email to the customer when a Reservation is created. Additionally, it ensures data synchronization by updating the Customer Email field on the Reservation, maintaining consistency between related records in Salesforce. The use of Workflow Rules and Email Alerts streamlines these processes, reducing manual effort and potential errors.

b. Email Alert -

**Approach -**

**Solution -**

**Justification -**