Day 2 -

30 November 2023

10:04

**DAY's Agenda**

**Process Builder**:

6. Whenever a Reservation is Approved then Resource record must be changed accordingly.

**e.g.,** if Reservation approved then reduce the quantity in resource, otherwise it should remain as a it is.

**Note:** if Resources are not available then please don’t access the Reservation.

7. Create a Dummy **Reservation** whenever a new **Customer** is created.

**Flows**:

8. Create a mechanism where user can submit feedback on scale 0-10. (using Screen flow)

9. If Status of **Customer** is Active set source as direct (using record triggered)

**Sharing Rules/Manual Sharing**

10. Share **Customer** record with Mr. Rajesh<<**Helpdesk user**>> if source is newspaper.

6. Whenever a Reservation is Approved then Resource record must be changed accordingly.

**e.g.,** if Reservation approved then reduce the quantity in resource, otherwise it should remain as a its.

**Note:** if Resources are not available then please don’t access the Reservation.

Requirements By The Client:

Whenever a Reservation is approved, the corresponding Resource record's quantity must be reduced. If resources are not available, the Reservation should not be processed.

Approach:

Process Builder and Auto-launch Flow:

Use Process Builder to trigger an auto-launched Flow when a Reservation is approved. The Flow should check the availability of resources and, if available, update the corresponding Resource record by reducing the quantity.

Solution:

Process Builder and Flow Configuration:

Configure a Process Builder to activate when a Reservation is approved. Within the Process Builder, call an auto-launched Flow that checks resource availability and updates the corresponding Resource record.

Justification:

Automation for Data Consistency:

By leveraging Process Builder and Flow, this solution automates the process of updating Resource records when Reservations are approved. It ensures that the quantity is adjusted accordingly, maintaining data consistency. The validation in the Flow prevents access to the Reservation if resources are not available, preventing potential data errors.

7. Create a Dummy **Reservation** whenever a new **Customer** is created.

**Requirements By The Client -**

**Approach -**

**Solution -**

**Justification -**

**Flows**:

8. Create a mechanism where user can submit feedback on scale 0-10. (using Screen flow)

**Requirements By The Client -**

**Approach -**

**Solution -**Here we are using screen flow. first we have to get that record of customer->conditional are met that Id equals customerIdVariable and using screen flow we are creating rating and fileds name & rating and then creating record of rating object and fields are customer equals customerIdVariable and rating equals rating. Then create screen flow for success.

**Justification -**

9. If Status of **Customer** is Active set source as direct (using record triggered)

**Requirements By The Client -**

**Approach -**

**Solution -**setup-->flows--select record triggered flow for customer object, whenever record is created or updated and conditional are met->status equals active and recordtypename equals non marketing-->field value for customer record -source equals direct.

**Justification -**

**Sharing Rules/Manual Sharing**

**10. Share Customer record with Mr. Rajesh<<Helpdesk user>> if source is newspaper.**  
  
**Requirements By The Client -**

There is Employee in RMS named Rajesh, He has helpdesk user as the profile.

Rajesh Should **Only See Records** in the **customer object** where **filed source** contains **newspaper**

**Approach -**

**Solution -**first we have go to sharing setting and make sure that OWD is private and go to user->profile select customer object, edit helpdesk user and view all & modify all should be unchecked. and user->public group create a new public group as Helpdesk User

And then go to new customer sharing rule, use a criteria based sharing to share all the record when the source is newspaper. **Justification -**