

# CRM Practical 2

Name. Harsha Hargunani

Batch. E1

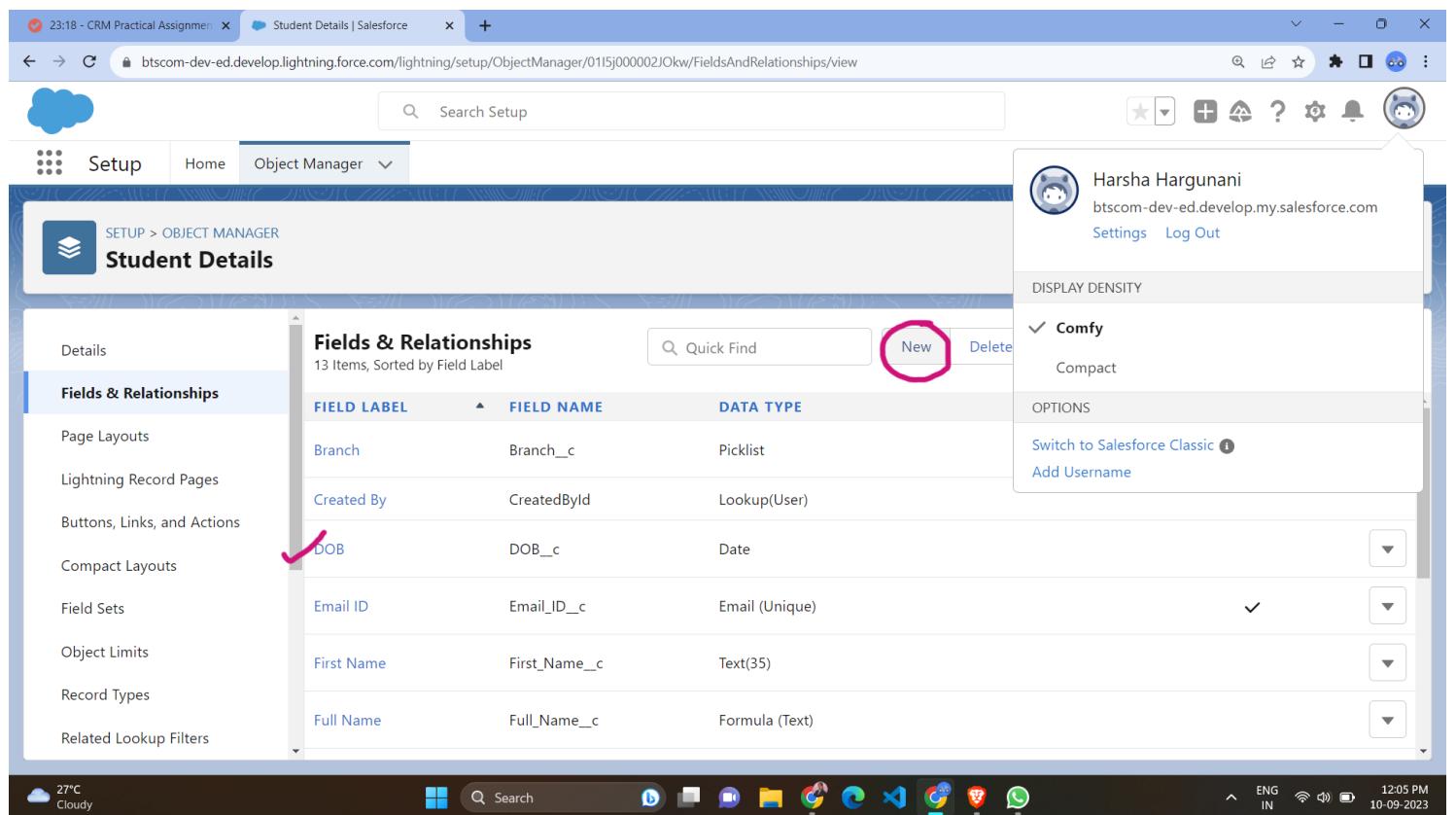
Roll no. 09

Salesforce Username - harsha@bts.com

Q1. Create a formula field to calculate age.

Ans. Step1: Setup | Object Manager | Student Details Object.

Step2: Make sure the DOB field is created first with data type as Date.



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected for the 'Student Details' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' section is open, showing a table with columns: FIELD LABEL, FIELD NAME, and DATA TYPE. There are 13 items listed. One item, 'DOB', has its label highlighted with a pink arrow and circled. The 'DATA TYPE' for 'DOB' is 'Date'. At the top right of the table, there's a 'New' button, which is also circled in pink. The top navigation bar shows the URL 'btscom-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5j000002JOkw/FieldsAndRelationships/view'. The top right corner of the screen shows the user profile of 'Harsha Hargunani' and the date '10-09-2023'.

Step3: New | Field type - Formula | Field Label - Age of student

Return Type - Number

Decimal Places - 0

21:54 - CRM Practical Assignment X Student Details | Salesforce + btscos-com-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l5j000002JOkw/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Student Details

Student Details New Custom Field

Step 2. Choose output type

Field Label: Age of student

Field Name: Age\_of\_student

Auto add to custom report type  Add this field to existing custom report types that contain this entity

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value  
Example: TODAY() > CloseDate

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.

27°C Cloudy Search ENG IN 12:07 PM 10-09-2023

21:43 - CRM Practical Assignment X Student Details | Salesforce + btscos-com-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l5j000002JOkw/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Student Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Checkbox Calculate a boolean value  
Example: TODAY() > CloseDate

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: Gross Margin = Amount - Cost\_c

Date Calculate a date, for example, by adding or subtracting days to or from another date.  
Example: Reminder Date = CloseDate - 7

Date/Time Calculate a date/time, for example, by adding a number of hours.  
Example: Next = NOW() + 1

Number Calculate a numeric value.  
Example: Fahrenheit = 1.8 \* Celsius\_c + 32

Percent Calculate a percent and automatically add the percent sign to the number.  
Example: Discount = (Amount - Discounted\_Amount\_c) / Amount

Text Create a text string, for example, by concatenating other text fields.  
Example: Full Name = LastName & " " & FirstName

Time Calculate a time, for example, by adding a number of hours to another time.  
Example: Next = TIMEVALUE(NOW()) + 1

Options

Decimal Places [0] Example: 999

Previous Next Cancel

27°C Cloudy Search ENG IN 12:07 PM 10-09-2023

Step4: Formula - YEAR( TODAY() ) - YEAR( DOB\_c )

20:58 - CRM Practical Assignment x Student Details | Salesforce x +

btscom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01i5j000002JOkw/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

**Student Details**

Details

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use advanced functions.

Example: Fahrenheit = 1.8 \* Celsius + 32 [More Examples...](#)

Simple Formula Advanced Formula

Insert Field Insert Operator

Age of student (Number) =

YEAR( TODAY() ) - YEAR( DOB )

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

Harsha Hargunani  
btscom-dev-ed.develop.my.salesforce.com  
Settings Log Out

DISPLAY DENSITY

✓ Comfy Compact

OPTIONS

Switch to Salesforce Classic Add Username

27°C Cloudy Search ENG IN 12:07 PM 10-09-2023

## Step5: Create records and the age field will appear after the record is saved.

17:18 - CRM Practical Assignment x Student Details | Salesforce x 106 | Student Details | Salesforce x +

btscom-dev-ed.develop.lightning.force.com/lightning/r/Student\_Details\_c/a025j00000dnTHAA/view

Passport Cloud Home Dashboards Customers Chatter Reports Addresses Students D...

Student Details 106

CSE

DOB  
01/09/1997

Student Full Name  
Jeon Jungkook

PAN Number

Email ID

Phone No

Full Name  
Jungkook Jeon

Age of student  
26

Created By  
Harsha Hargunani, 09/09/2023, 8:28 pm

Last Modified By  
Harsha Hargunani, 09/09/2023, 8:28 pm

Harsha Hargunani  
btscom-dev-ed.develop.my.salesforce.com  
Settings Log Out

DISPLAY DENSITY

✓ Comfy Compact

OPTIONS

Switch to Salesforce Classic Add Username

27°C Cloudy Search ENG IN 12:13 PM 10-09-2023

Q2. Create a formula field "Eligible for Voting" (Checkbox), if age is greater or equals to 18. Else UnCheck the Checkbox.

Ans. Step1: Setup | Object Manager | Student Details Object.

Step2: Make sure the Age field is created first with data type as Number.

Step3: New | Field type - Formula | Field Label - Age of student

Return Type - Checkbox

Step4: Formula - IF( Age\_of\_student\_\_c >= 18, true, false)

The screenshot shows the Salesforce Setup interface for the 'Student Details' object. On the left, there's a sidebar with various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Formula Options' for a new field named 'Eligibility to vote (Checkbox)'. The 'Formula Return Type' is set to 'Checkbox'. The formula entered is 'IF( Age\_of\_student\_\_c >= 18, true, false)'. A tooltip for the formula editor lists standard functions such as ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. The top right shows the user profile of Harsha Hargunani and some display density settings. The bottom right shows the Windows taskbar with various icons and system status.

Step5: Check records and the new field will be seen.

04:53 - CRM Practical Assignment | 106 | Student Details | Salesforce | Student Details | Salesforce | +

Passport Cloud Home Dashboards Customers Chatter Reports Addresses Students Details Subjects More

Student Details 106

01/09/1997

Student Full Name  
Jeon Jungkook

PAN Number

Email ID

Phone No

Full Name  
Jungkook Jeon

Age of student  
26

Eligible for Voting

Created By  
 Harsha Hargunani, 09/09/2023, 8:28 pm

Last Modified By  
 Harsha Hargunani, 09/09/2023, 8:28 pm

29°C Cloudy

Search

New Contact Edit New Opportunity

No past activity. Past meetings and tasks marked as done show up here.

more.

ENG IN 03:23 PM 10-09-2023

04:53 - CRM Practical Assignment | 108 | Student Details | Salesforce | Student Details | Salesforce | +

Passport Cloud Home Dashboards Customers Chatter Reports Addresses Students Details Subjects More

Student Details 108

14/11/2006

Student Full Name  
Shin Yuna

PAN Number

Email ID

Phone No

Full Name  
Yuna Shin

Age of student  
17

Eligible for Voting

Created By  
 Harsha Hargunani, 10/09/2023, 3:01 pm

Last Modified By  
 Harsha Hargunani, 10/09/2023, 3:01 pm

29°C Cloudy

Search

New Contact Edit New Opportunity

No past activity. Past meetings and tasks marked as done show up here.

more.

ENG IN 03:23 PM 10-09-2023

Q3. Create a Formula Field "Applicant Type". If Age  $\geq$  18, then Print "Major", Else "Minor".  
Ans. Step1: Setup | Object Manager | Student Details Object.

Step2: Make sure the Age field is created first with data type as Number.

Step3: New | Field type - Formula | Field Label - Applicant Type  
Return Type - Text

Step4: Enter Formula

The screenshot shows the Salesforce Setup interface. The user is in the 'Object Manager' section under 'Student Details'. A context menu is open for the user 'Harsha Hargunani'. The main area displays 'Step 3. Enter formula' for creating a new custom field. The formula entered is:

```
IF( Age of student >=18, "Major", "Minor")
```

The formula builder interface includes fields for 'Insert Field', 'Insert Operator', and a dropdown for 'Functions' containing 'ABS', 'ACOS', 'ADDMONTHS', 'AND', and 'ASCII'. A 'Quick Tips' box lists 'Getting Started' and 'Operators & Functions'.

Step5: Check in the records.

Full Name

Jungkook Jeon

Age of student

26

Eligible for Voting



Applicant Type

Major

Created By



Harsha Hargunani, 09/09/2023, 8:28 pm

Full Name  
Yuna Shin

---

Age of student  
17

---

Eligible for Voting

---

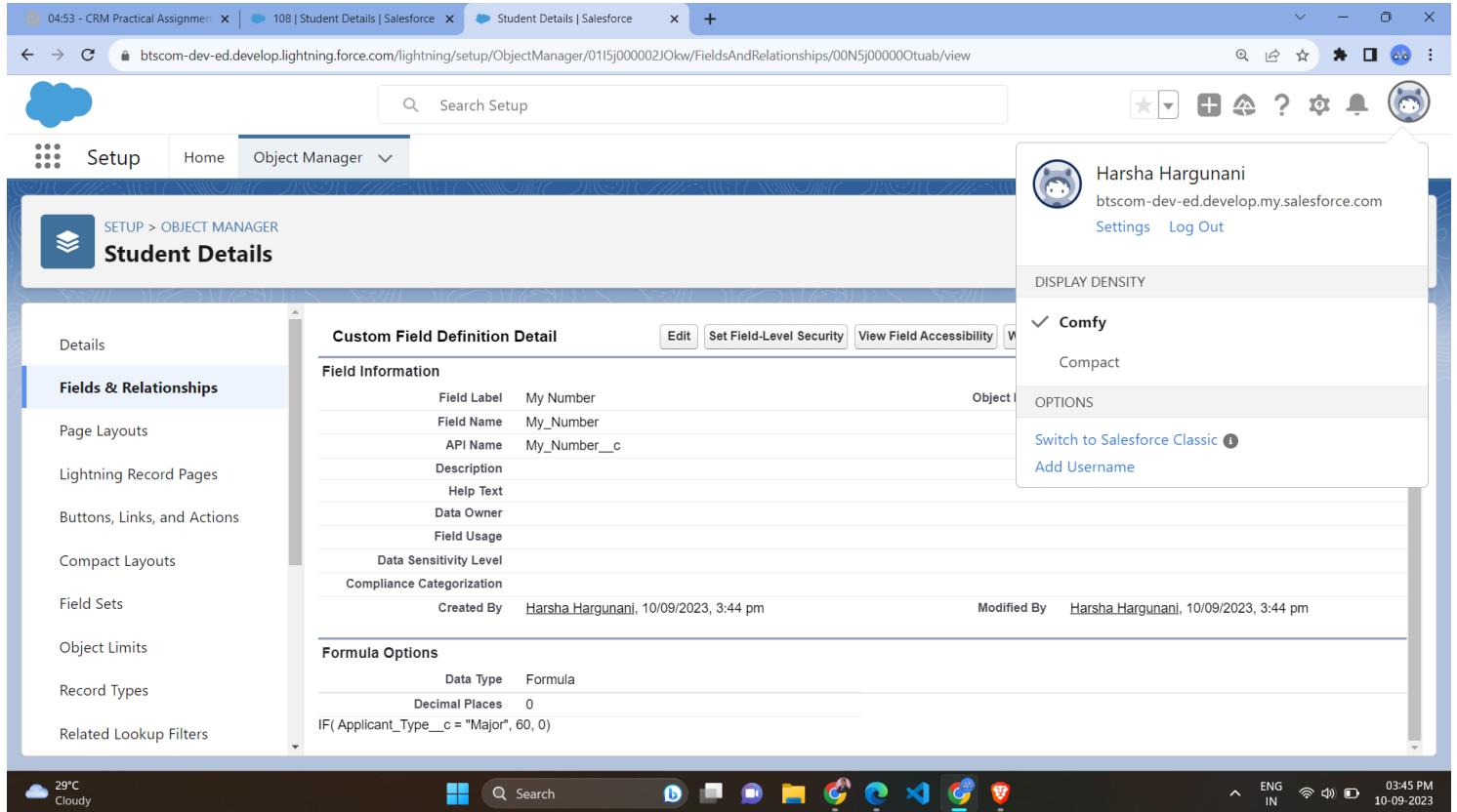
Applicant Type  
Minor

---

Created By  
 Harsha Hargunani, 10/09/2023, 3:01 pm

**Q4. Create a Formula Field "My Number". My Number should be 60 for Major Applicants. Otherwise, My Number must be 0.**

**Ans. Formula - IF( Applicant\_Type\_c = "Major", 60, 0)**



The screenshot shows the Salesforce Setup interface for creating a custom field. The left sidebar shows 'Fields & Relationships' selected. The main area displays the 'Custom Field Definition Detail' for 'My Number'. The 'Field Information' section includes the field label 'My Number', field name 'My\_Number', API name 'My\_Number\_\_c', and a formula under 'Formula Options':

```
IF(Applicant_Type_c = "Major", 60, 0)
```

The right sidebar shows the user profile of Harsha Hargunani, including options for 'DISPLAY DENSITY' (set to 'Comfy') and 'OPTIONS' (with links to 'Switch to Salesforce Classic' and 'Add Username').

**Q5. Create a Formula Field "Eligibility". Show Yes Logo and No Logo as per Eligibility (Age).**  
**Ans. Step1: First download the logo images and store it in your computer OR use an online URL.**

## Step2: Search for "Static Resources"

The screenshot shows the Salesforce Setup Home page. At the top, there is a search bar with the word "static". Below the search bar, a sidebar lists various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, and Lightning Experience Transition Assistant. A main content area features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Below these cards is a section titled "Most Recently Used" which shows 10 items. The status bar at the bottom indicates it's 08:42 PM on 10-09-2023.

## Step3: Click "New".

The screenshot shows the "Static Resources" list page under the "SETUP" tab. The page title is "Static Resources". It includes a brief description and a "View:" dropdown with "All" selected. A "New" button is highlighted with a red circle. The main table lists one item: "yesLogoimage" with a namespace prefix of "Yes Logo for Student Details Object", a MIME type of "image/jpeg", a size of 6,960 bytes, and was created by "HHarg" on 10/09/2023 at 10:09:45 pm. The status bar at the bottom indicates it's 08:46 PM on 10-09-2023.

## Step4: Upload the image of Yes Logo and enter the details. Click on "Save".

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with various links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with sub-links for Users, Data, and Email), and a weather widget. The main content area is titled 'Static Resources'. It shows a 'Static Resource Edit' form with fields for Name (Yes Logo), Description (empty), File (Choose File Yes Logo.jpg), Cache Control (Public), and two buttons at the bottom: 'Save' (circled in red) and 'Cancel'. The top navigation bar includes tabs for CRM Practical Assignment, Use Images in 'Formula' Fields, and Static Resources | Salesforce.

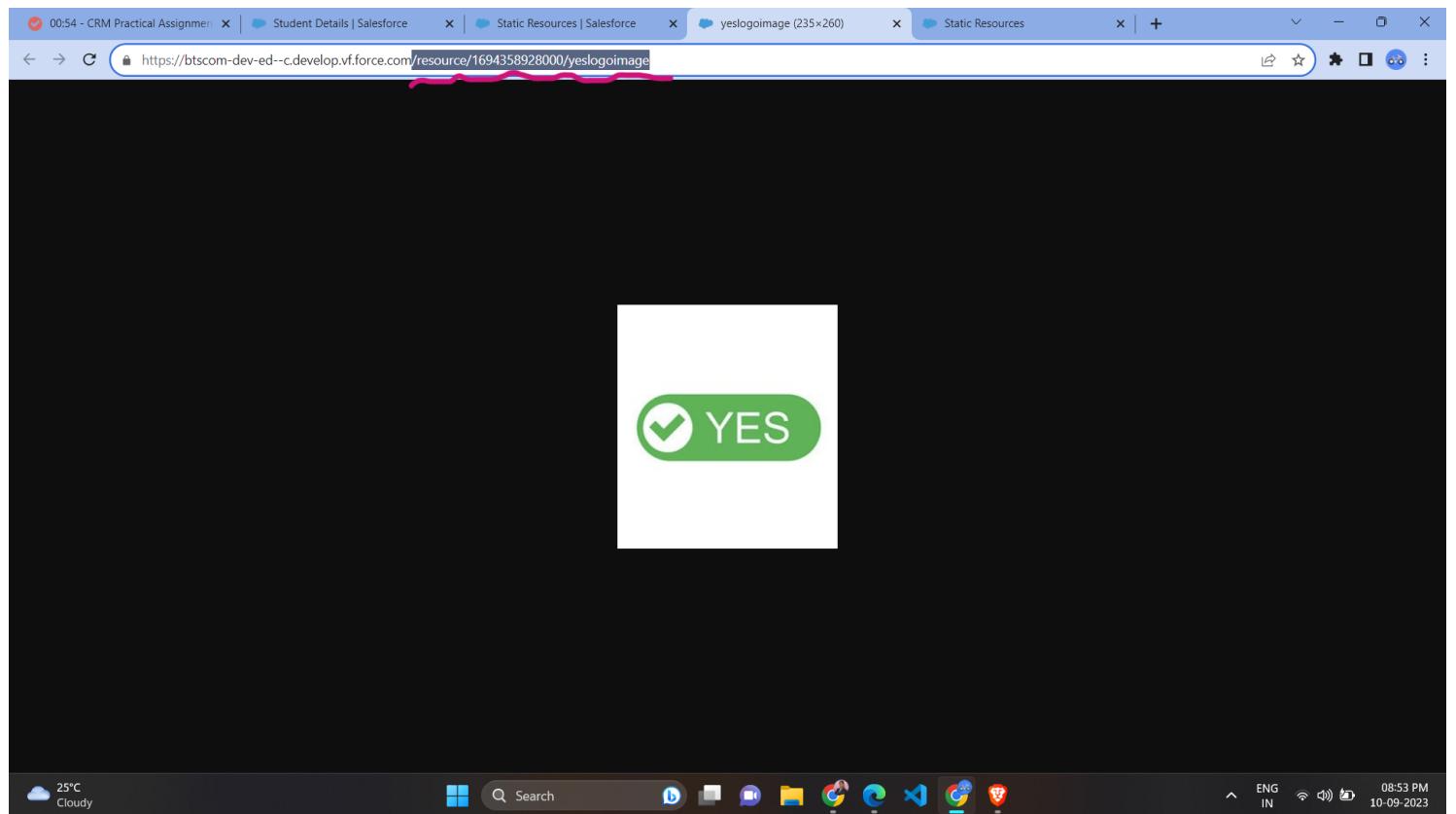
## Step5: Once the file is saved, click "View File".

The screenshot shows the Salesforce Static Resource Detail screen for a resource named 'yeslogoimage'. The page displays the following details:

Name	yeslogoimage
Namespace Prefix	
Description	Yes Logo for Student Details Object
MIME Type	image/jpeg
Cache Control	Public
Size	6,960 bytes
Created By	Harsha Hargunani, 10/09/2023, 8:44 pm
Last Modified By	Harsha Hargunani, 10/09/2023, 8:45 pm

A red circle highlights the 'View file' link under the 'Created By' section. To the right of the main content, there's a user profile sidebar for Harsha Hargunani, showing options like DISPLAY DENSITY (set to Comfy), OPTIONS (Compact), and links to Settings and Log Out. The top navigation bar includes tabs for CRM Practical Assignment, Student Details | Salesforce, and Static Resources | Salesforce.

Step6: Copy the URL from the address bar of the browser starting from "/" after the domain name and shown below. Save this URL somewhere safe for now.



Step7: Follow the same steps for No Logo Image as well.

Step8: Create a new Formula type field in Student Details. Return Type - Text.

Step9: Enter the following formula and replace the below URLs with your resource URL within quotes.

05:00 - Time for a break!    Student Details | Salesforce    Static Resources | Salesforce    nologoimage (236x251)    Visualforce Components

btscom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l5j000002JOkw/FieldsAndRelationships/00N5j00000OtvTy/edit

**Student Details**

**Formula Options**

Formula Return Type: Text

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional Examples: Full Name = LastName & ", " & FirstName | More Examples...

Simple Formula   Advanced Formula

Insert Field   Insert Operator

Eligibility (Text) =

```
IF( Age of student >=18, IMAGE("/resource/1694358928000/nologoimage", "Yes Logo", 40, 60), IMAGE("/resource/1694359260000/nologoimage?", "No Logo", 40, 60))
```

ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN

Insert Selected Function

## Step10: Check the result among records-

Student Details  
106

StudentID	Age of student
106	26
First Name	Student Full Name
Jungkook	Jeon Jungkook
Last Name	Eligibility
Jeon	
DOB	Eligible for Voting
01/09/1997	<input checked="" type="checkbox"/>
Branch	Applicant Type
CSE	Major
PAN Number	My Number
Phone No	60
	Email ID
	Owner
	Harsha Hargunani

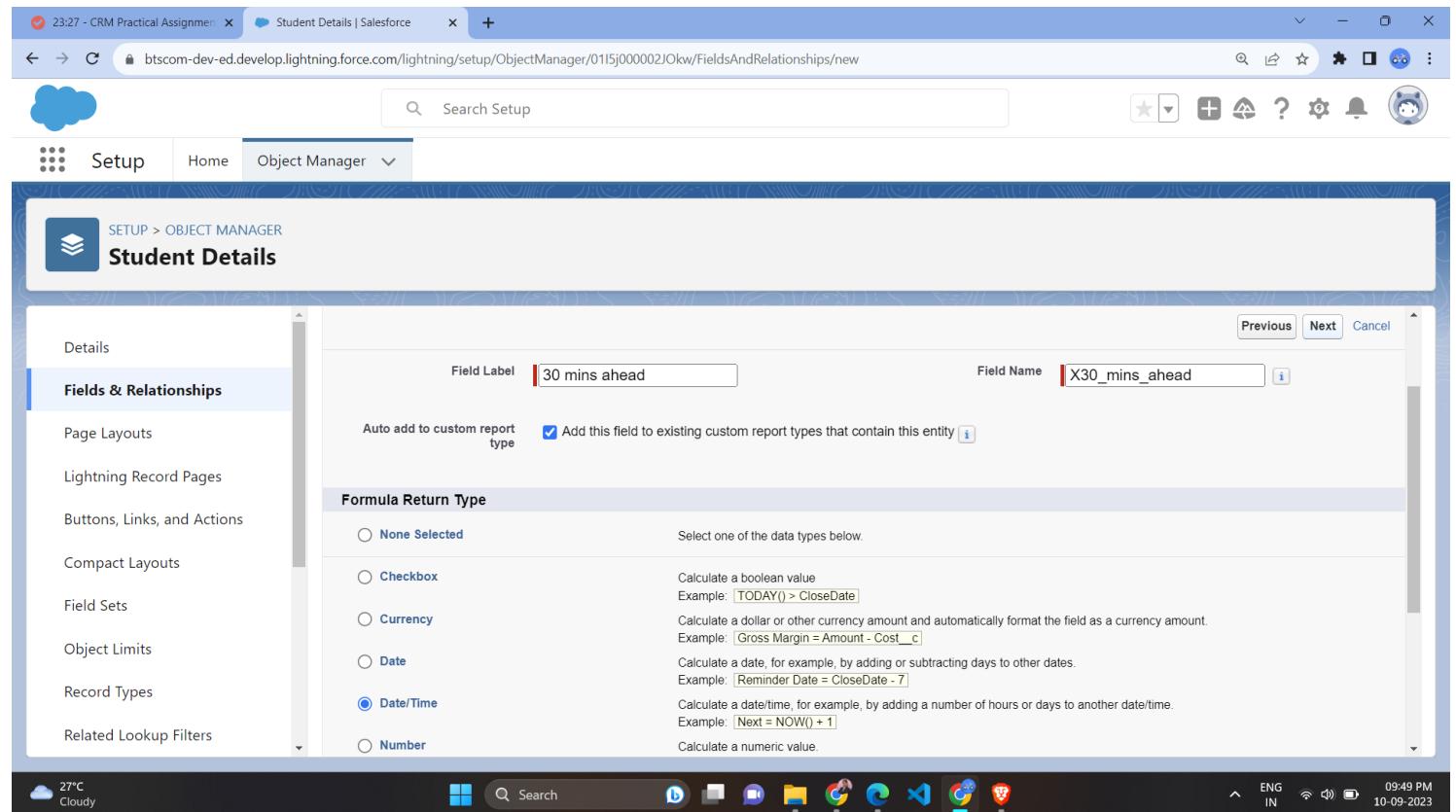
**Student Details**

**108**

StudentID 108	Age of student 17
First Name Yuna	Student Full Name Shin Yuna
Last Name Shin	Eligibility 
DOB 14/11/2006	Eligible for Voting <input type="checkbox"/>
Branch IT	Applicant Type Minor
PAN Number	My Number 0
Phone No	Email ID  Harsha Hargunani

**Q6. How can I create a new Time field in Salesforce that automatically calculates a time 30 minutes after the Created Date of a record?**

**Ans. Step1: Create a Formula type field with Date/Time as return type.**



The screenshot shows the Salesforce Setup interface for creating a new field. The left sidebar has 'Fields & Relationships' selected. The main area shows the configuration for a new field:

- Field Label:** 30 mins ahead
- Field Name:** X30\_mins\_ahead
- Formula Return Type:** Date/Time (selected)
- Description:** Calculate a date/time, for example, by adding a number of hours or days to another date/time. Example: `Next = NOW() + 1`

## Step2: In the formula field insert “Created Date” API Name-

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A modal window titled 'Insert Field' is open, displaying a tree view of available fields under 'Student Details'. The 'Created Date' field is selected and highlighted. The 'Formula Return Type' is set to 'Date/Time'. The right side of the dialog shows the selected field details: 'CreatedDate' (Type: Date/Time, API Name: CreatedDate). The status bar at the bottom indicates it's 10:00 PM on 10-09-2023.

## Step3: Complete the formula-

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A modal window titled 'Formula Editor' is open, showing a 'Simple Formula' input field containing the formula: 'CreatedDate + (30 / (24 \* 60))'. The 'Formula Return Type' is set to 'Date/Time'. The right side of the dialog shows a list of available functions: ADDMONTHS, AND, ASCII, ASIN, and Insert Selected Function. The status bar at the bottom indicates it's 10:03 PM on 10-09-2023.

## Step4: Check in the records.

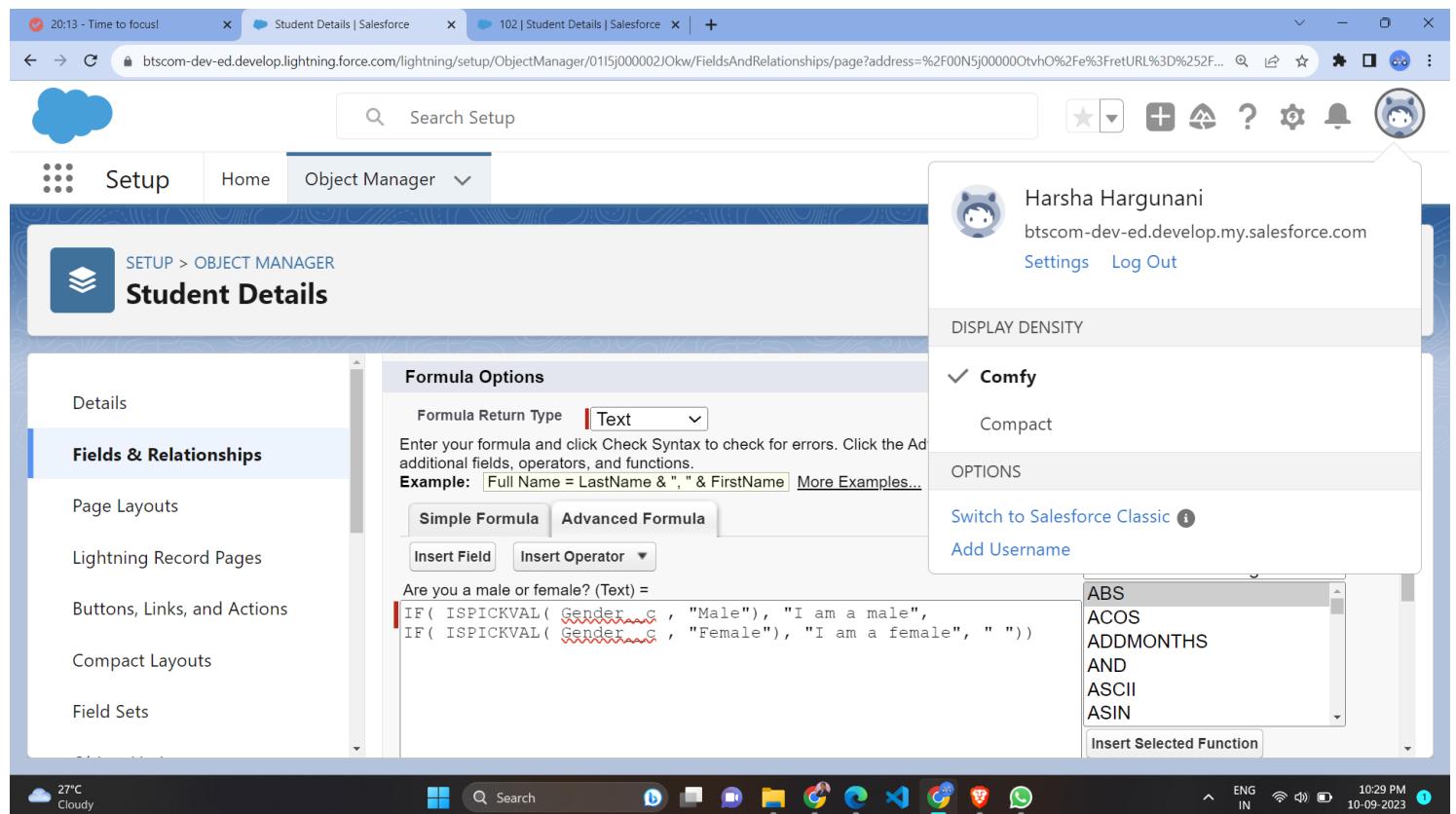
Branch	<input type="text" value="CSE"/>
PAN Number	<input type="text"/>
Phone No	<input type="text"/>
30 mins ahead	<input type="text"/>
09/09/2023, 8:58 pm	<input type="text"/>
Created By	<input type="text"/>
 Harsha Hargunani, 09/09/2023, 8:28 pm	

Branch	<input type="text" value="CSE"/>
PAN Number	<input type="text"/>
Phone No	<input type="text"/>
30 mins ahead	<input type="text"/>
28/07/2023, 11:45 am	<input type="text"/>
Created By	<input type="text"/>
 Harsha Hargunani, 28/07/2023, 11:15 am	

Q7. If Gender is Male, then show "I am a Male". Else Show "I am a Female".

Ans. Step1: Make a "Gender" field first.

Step2: New | Formula Type field | Text Return Type | Formula -



The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** 20:13 - Time to focus! | Student Details | Salesforce | 102 | Student Details | Salesforce | +
- Search Bar:** Search Setup
- User Profile:** Harsha Hargunani, btscom-dev-ed.develop.my.salesforce.com, Settings, Log Out
- Setup Navigation:** Setup, Home, Object Manager
- Object Manager Path:** SETUP > OBJECT MANAGER
- Object Name:** Student Details
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets.
- Formula Options:**
  - Formula Return Type: Text
  - Description: Enter your formula and click Check Syntax to check for errors. Click the Advanced Fields, Operators, and Functions link to learn more.
  - Example: Full Name = LastName & ", " & FirstName | More Examples...
  - Buttons: Simple Formula, Advanced Formula, Insert Field, Insert Operator.
  - Formula Editor:

```
Are you a male or female? (Text) =
IF( ISPICKVAL( Gender__c , "Male") , "I am a male",
IF( ISPICKVAL( Gender__c , "Female") , "I am a female", " " ))
```
- Function Picker:** Shows a list of available functions including ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. with an 'Insert Selected Function' button.
- System Bar:** 27°C Cloudy, Search, Baidu, File, Google, Email, Chat, 10:29 PM, 10-09-2023, ENG IN

Note - The formula isn't IF(ISPICKVAL(..., 'Male'), "I am male", "I am female") because the gender picklist can also be "others". If such a formula is used it will fill "I am female" for "others" gender along with the female ones. Hence we use a different formula that will leave the field blank, if the picklist value is "others".

### Step3: Verify the result in records

30 mins ahead

28/07/2023, 11:45 am

Gender

Male

Are you a male or female?

I am a male

Created By

 Harsha Hargunani, 28/07/2023, 11:15 am

30 mins ahead

10/09/2023, 3:31 pm

Gender

Female

Are you a male or female?

I am a female

Created By

 Harsha Hargunani, 10/09/2023, 3:01 pm

### Q8. Use CASE function to demonstrate multiple conditions.

Ans. Solving same Q7 using CASE function-

The screenshot shows the Salesforce Object Manager interface for the 'Student Details' object. In the 'Formula Options' section, the formula is defined as:

```
CASE(TEXT( Gender ),  
    "Male", "I am a male",  
    "Female", "I am a female",  
    "Others", "I belong to a different gender", " ")
```

The formula editor includes a dropdown for 'Formula Return Type' set to 'Text', and tabs for 'Simple Formula' and 'Advanced Formula'. Below the formula, there is a list of available functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, with an 'Insert Selected Function' button at the bottom.

### Results-

30 mins ahead  
09/09/2023, 8:58 pm

Gender

Are you a male or female?

Created By

 Harsha Hargunani, 09/09/2023, 8:28 pm

30 mins ahead  
09/09/2023, 8:58 pm

Gender

Others

Are you a male or female?

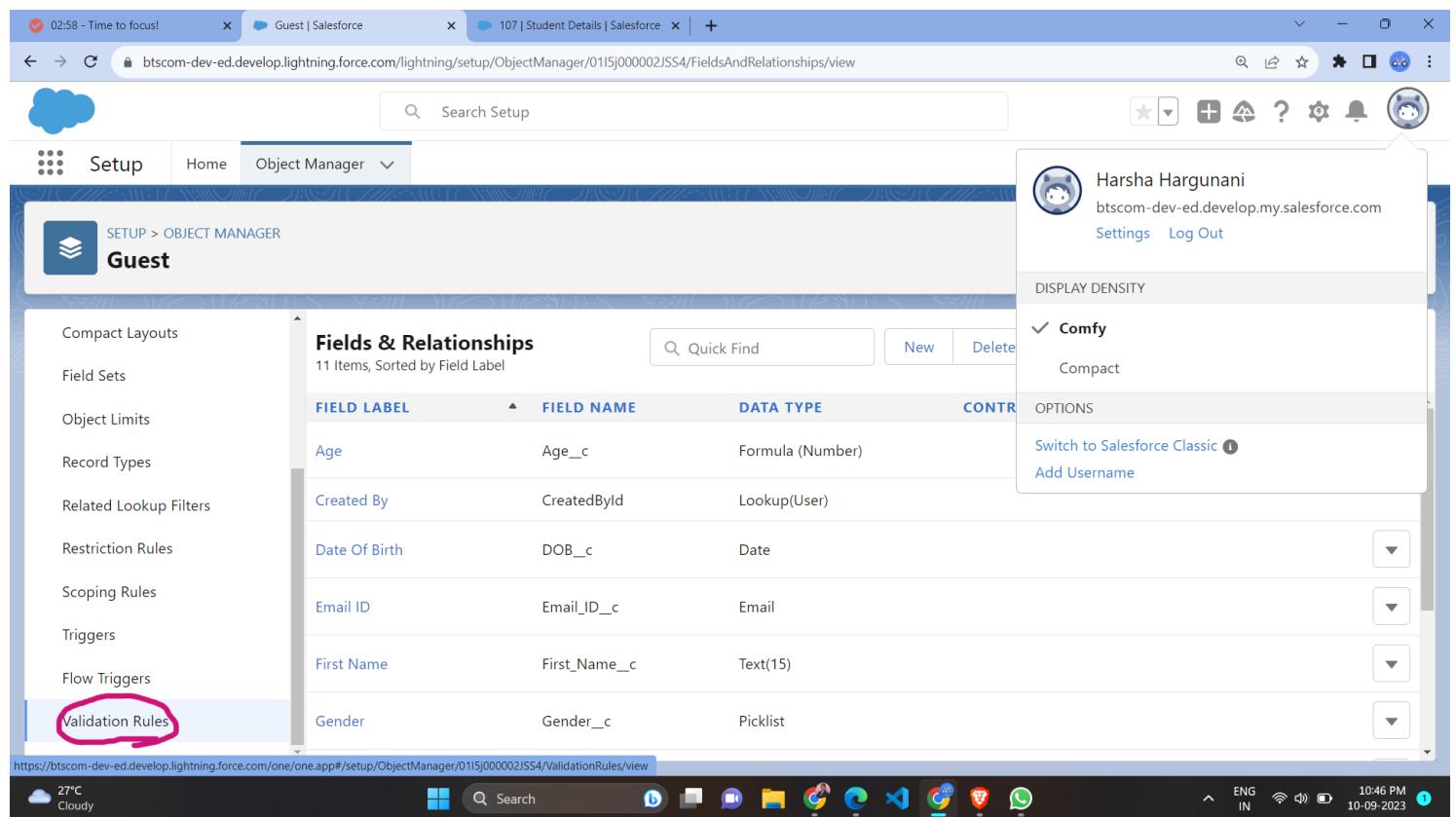
I belong to a different gender

Created By

 Harsha Hargunani, 09/09/2023, 8:28 pm

## Q9. Prevent Applicant if Age less than 18

Ans. Step1: Setup | Object Manager (Guest) | Validation Rules



The screenshot shows the Salesforce Object Manager interface for the 'Guest' object. The left sidebar lists various setup options like Compact Layouts, Field Sets, Object Limits, Record Types, etc., with 'Validation Rules' highlighted and circled in red at the bottom. The main area displays a table titled 'Fields & Relationships' with 11 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, and CONTR. The rows show fields such as Age (Age\_c, Formula Number), Created By (CreatedBy, Lookup User), Date Of Birth (DOB\_c, Date), Email ID (Email\_ID\_c, Email), First Name (First\_Name\_c, Text(15)), and Gender (Gender\_c, Picklist). A right-hand sidebar shows user information (Harsha Hargunani) and display density settings (Comfy, Compact). The URL in the browser bar is https://btscom-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01I5j000002JSS4/ValidationRules/view.

Step2: New | Enter Rule Name | Enter Formula

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. The main area displays a validation rule named 'Underage'. The rule is active and has an empty description. The 'Error Condition Formula' field contains the expression 'Age\_\_c < 18', which is highlighted with a red oval. The formula example 'Discount\_Percent\_c>0.30' and its description 'Display an error if Discount is more than 30%' are also visible. A sidebar on the right shows the user profile 'Harsha Hargunani' and various settings like 'DISPLAY DENSITY' set to 'Comfy' and 'OPTIONS'.

### Step3: Check syntax | Enter Error Message | Save

The screenshot shows the same Salesforce Object Manager interface after saving the validation rule. The 'Error Condition Formula' field now displays 'Check Syntax' with the message 'No errors found'. The 'Error Message' section shows the example 'Discount percent cannot exceed 30%' and the message 'This message will appear when Error Condition formula is true'. The 'Error Message' input field contains the text 'Guests below 18 cannot have a booking on their name', which is highlighted with a pink checkmark. The 'Error Location' section indicates the message will appear at the 'Top of Page'. The rest of the interface remains consistent with the previous screenshot.

### Step4: Verification-

A screenshot of a Salesforce Lightning page titled "Guests Recently Viewed". The page displays a list of guests with their names and IDs. A modal window is open, prompting the user to review errors. The errors listed are: "Guests below 18 cannot have a booking on their name". The modal includes buttons for "Cancel", "Save & New", and "Save".

## Q10. Prevent Applicant, if Pan Card is Blank.

Ans.

A screenshot of the Salesforce Setup interface, specifically the Object Manager for "Student Details". On the left, there's a sidebar with options like "Details", "Fields & Relationships", "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", and "Field Sets". The main content area shows a "Validation Rule Detail" for a rule named "PAN\_Mandatory". The rule uses the formula "ISBLANK( PAN\_Number\_\_c )". The error message is "Please fill PAN Number". The error location is "PAN Number". The rule was created by "Harsha Hargunani" on "10/09/2023, 10:59 pm" and modified by "Harsha Hargunani" on "10/09/2023, 11:00 pm". A context menu is open on the right, showing options for "Comfy" (selected), "Compact", "OPTIONS", "Switch to Salesforce Classic", and "Add Username".

## Q11. Prevent Applicant, if DOB Month is “August”.

Ans.

The screenshot shows the Salesforce Object Manager interface. On the left, there's a sidebar with 'SETUP' and 'Object Manager'. The main area displays a validation rule named 'No\_August\_borns'. The rule details are as follows:

- Rule Name:** No\_August\_borns
- Error Condition Formula:** MONTH( DOB\_\_c ) = 8
- Error Message:** Applicants born in August cannot submit the form
- Description:** (empty)
- Created By:** Harsha Hargunani, 10/09/2023, 11:03 pm
- Active:** Yes
- Error Location:** Top of Page
- Modified By:** Harsha Hargunani, 10/09/2023, 11:03 pm

A sidebar on the right shows user information (Harsha Hargunani) and settings (DISPLAY DENSITY set to Comfy, OPTIONS). The bottom of the screen shows a taskbar with various icons and system status.

The screenshot shows the Salesforce Lightning Experience. A new student record is being created for 'Sonia Laroa' with DOB '15/08/2007' and Branch 'MECH'. A validation error message 'We hit a snag.' is displayed, stating: 'Review the errors on this page.' with the note: '• Applicants born in August cannot submit the form'. The bottom of the screen shows a taskbar with various icons and system status.

## Q12. Prevent Applicant if Age <18 and Last Name is Blank.

Ans.

The screenshot shows the Salesforce Object Manager interface. On the left, under the 'Object Manager' tab, there is a section titled 'Student Details Validation Rule'. It displays the following details:

- Validation Rule Detail**: Rule Name is 'minor\_and\_no\_last\_name', Error Condition Formula is 'AND( Age\_of\_student\_\_c < 18, ISBLANK( Last\_Name\_\_c ) )', and it is Active.
- Error Message**: 'Applicant cannot have age less than 18 and leave the last name blank at the same time.'
- Description**: 'Harsha Hargunani, 12/09/2023, 9:40 pm'
- Created By**: 'Harsha Hargunani, 12/09/2023, 9:40 pm'
- Modified By**: 'Harsha Hargunani, 12/09/2023, 9:40 pm'

The right side of the screen shows a user profile for 'Harsha Hargunani' and various settings like 'DISPLAY DENSITY' set to 'Comfy' and 'OPTIONS'.

The screenshot shows the Salesforce Lightning Experience. A modal window is displayed, indicating an error: 'Ø We hit a snag.' The message states: 'Review the errors on this page.' with a bullet point: '• Applicant cannot have age less than 18 and leave the last name blank at the same time.' The modal has buttons for 'Cancel', 'Save & New', and 'Save'.

### Q13. How Many Validation Rules can we create per Object?

Ans. In the developer edition, there can be 100 validation rules per object.

### Q14. Prevent applicants from submitting invalid Pan Card Number.

Ans. PAN Numbers are -

- 10-digit alphanumeric number.
- First 5 characters are always alphabets
- Followed by 4 numeric digit
- Ending with an alphabet.

The screenshot shows the Salesforce Object Manager interface. On the left, under the 'Object Manager' tab, a validation rule for 'Student Details' is displayed. The rule is titled 'Validation Rule Detail' and has the following details:

Rule Name	No_invalid_PAN_Number	Active
Error Condition Formula	ISBLANK( PAN_Number__c )    NOT( REGEX( PAN_Number__c , "[A-Za-z]{5}[0-9]{4}[A-zA-Z]{1}") )	<input checked="" type="checkbox"/>
Error Message	Please enter valid PAN Number	Error Location PAN Number
Description		
Created By	Harsha Hargunani, 12/09/2023, 9:56 pm	Modified By Harsha Hargunani, 12/09/2023, 9:56 pm

On the right, a user profile for 'Harsha Hargunani' is shown, along with options for 'DISPLAY DENSITY' (set to 'Comfy'), 'OPTIONS' (with links to 'Switch to Salesforce Classic' and 'Add Username'), and a sidebar with various icons and status information (e.g., 27°C Haze, system notifications).

The screenshot shows a Salesforce Lightning page for 'New Student Details'. A validation error message is displayed: 'Please enter valid PAN Number'. The error message is highlighted in red. Below the message, a red banner says 'We hit a snag.' and lists the error: 'Review the following fields • PAN Number'. At the bottom of the modal are 'Cancel', 'Save & New', and 'Save' buttons.

Q15. Only Capital Letters should be allowed in the Pan Card.

Ans. Same format as before, just exclude "a-z" from the regex.

The screenshot shows the Salesforce Setup Object Manager. On the left, under 'Object Manager', there is a section titled 'Student Details Validation Rule'. It displays a validation rule named 'Only\_capital\_letters\_in\_PAN' with the formula: ISBLANK( PAN\_Number\_\_c ) || NOT( REGEX( PAN\_Number\_\_c , "[A-Z]{5}[0-9]{4}[A-Z]{1}" ) ). The rule is active. On the right, a user profile for 'Harsha Hargunani' is shown, along with options for 'DISPLAY DENSITY' (set to 'Comfy'), 'OPTIONS' (with 'Switch to Salesforce Classic' and 'Add Username' buttons), and a link to 'Settings' and 'Log Out'.

Salesforce screenshot showing a validation error for a PAN Number field.

The screenshot shows a Salesforce page titled "New Student Details". A validation error message is displayed:

**PAN Number**  
MbgH9367T  
Please enter valid PAN Number; Please enter PAN Number in Uppercase / block letters

A modal window titled "We hit a snag." contains the message:

Review the following fields  
• [PAN Number](#)

Buttons at the bottom of the modal: **Cancel**, **Save & New**, **Save**.

The status bar at the bottom shows: 26°C Party cloudy, Search, b, File, Home, Object Manager, ENG IN, 10:11 PM, 12-09-2023.

## Q16. Only 5-8 Digits should be allowed.

Ans. Changing the range of digits from 0-9 to 5-8

Salesforce screenshot showing the creation of a Validation Rule for the PAN Number field.

The screenshot shows the "Object Manager" section under "Setup".

**Student Details Validation Rule**

**Validation Rule Detail**

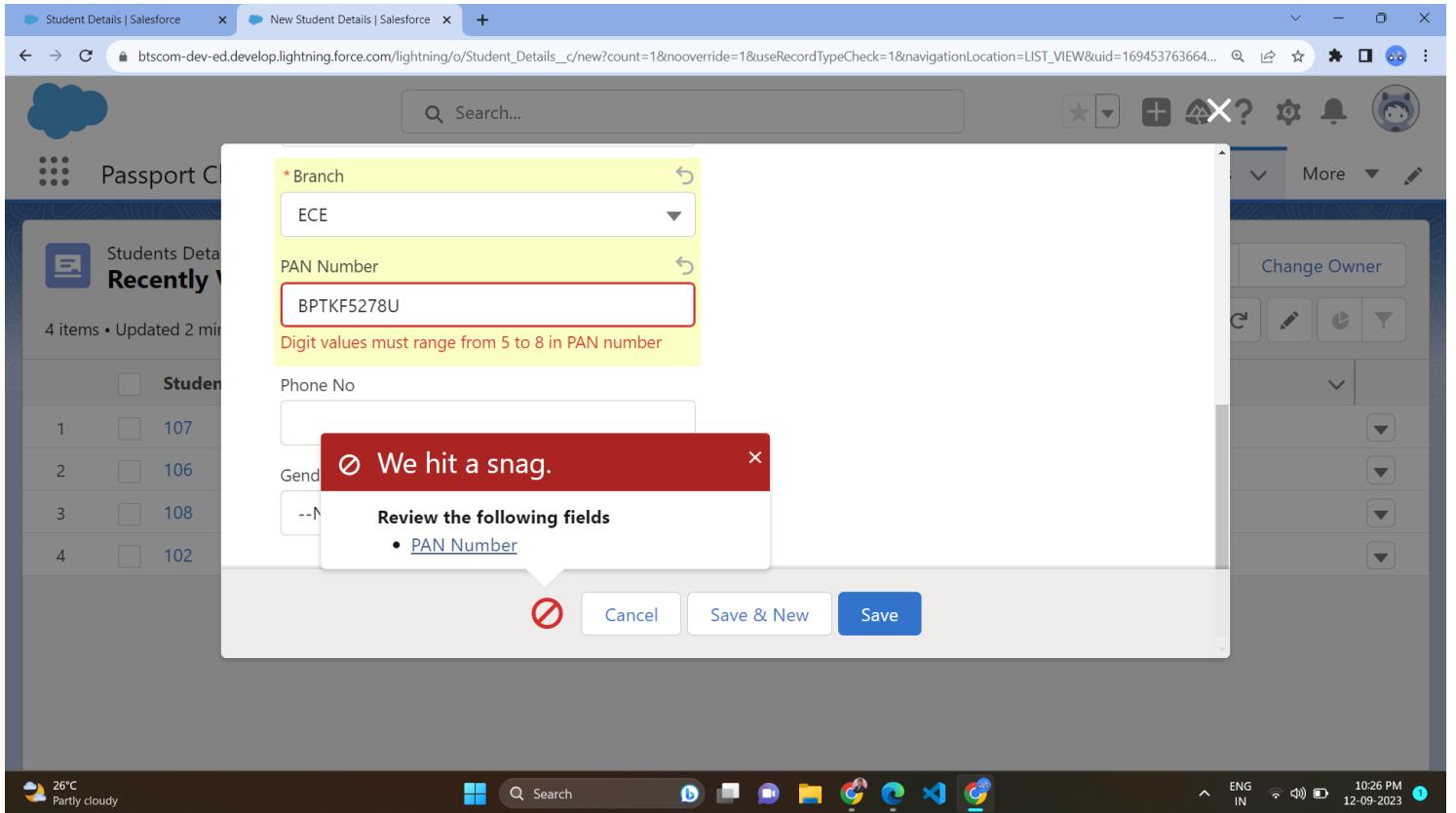
Rule Name	Only_5_to_8_digits_in_PAN	Active	
Error Condition Formula	ISBLANK( PAN_Number__c )    NOT( REGEX( PAN_Number__c, "[A-Za-z]{5}[5-8]{4}[A-zA-Z]{1}" ) )	<input checked="" type="checkbox"/>	
Error Message	Digit values must range from 5 to 8 in PAN number	Error Location PAN Number	
Description			
Created By	Harsha Hargunani, 12/09/2023, 10:17 pm	Modified By	Harsha Hargunani, 12/09/2023, 10:23 pm

Buttons: **Edit**, **Clone**

Related Lookup Filters: Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, Validation Rules.

Help for this Page ?

The status bar at the bottom shows: 26°C Party cloudy, Search, b, File, Home, Object Manager, ENG IN, 10:23 PM, 12-09-2023.



## Q17. Prevent Special Symbols and Numbers in the First Name

Ans.

- ^ The caret symbol tells the computer that the match must start at the beginning of the string or line.
- \$ It tells the computer that the match must occur at the end of the string or before \n at the end of the line or string.
- \* It tells the computer to match the preceding character (or set of characters) for 0 or more times (upto infinite).
- + It tells the computer to repeat the preceding character (or set of characters) at atleast one or more times(up to infinite).

Object Manager | Salesforce Recently Viewed | Students Details + btscm-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03d5j000000ttBt

Search Setup

Setup Home Object Manager

## SETUP Object Manager

### Student Details Validation Rule

Back to Student Details

**Validation Rule Detail**

Rule Name	Only_alphabets_in_Name	Active	<input checked="" type="checkbox"/>
Error Condition Formula	NOT( REGEX( First_Name__c, "[A-Za-z]*\$") )	Error Location	First Name
Error Message	The first name must contain only alphabets and no special characters	Description	
Created By	Harsha Hargunani, 12/09/2023, 10:34 pm	Modified By	Harsha Hargunani, 12/09/2023, 10:34 pm

**DISPLAY DENSITY**

✓ Comfy

Compact

**OPTIONS**

Switch to Salesforce Classic ⓘ

Add Username

Harsha Hargunani  
btscm-dev-ed.develop.my.salesforce.com  
Settings Log Out

26°C Partly cloudy Search ENG IN 10:34 PM 12-09-2023

Object Manager | Salesforce New Student Details | Salesforce + btscm-dev-ed.develop.lightning.force.com/lightning/o/Student\_Details\_\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=169453830428...

Search...

StudentID Email ID

\* First Name Bhanva@64

The first name must contain only alphabets and no special characters

Last Name

DOB

We hit a snag.

Review the following fields

• First Name

Cancel Save & New Save

Change Owner

4 items • Updated a minute ago

Students Details Recently Viewed

1 107 2 106 3 108 4 102

Branch IT

26°C Partly cloudy Search ENG IN 10:36 PM 12-09-2023

## Q18. Prevent Special Symbols and Numbers in the First Name and Last Name.

Ans.

The screenshot shows the 'Student Details Validation Rule' configuration in the Object Manager. The validation rule is named 'Only\_alphabets\_in\_Name'. The error condition formula is `NOT(REGEX(First\_Name\_\_c, "[^A-Za-z]\*\$")) && NOT(REGEX>Last\_Name\_\_c, "[^A-Za-z]\*\$"))` . The error message is 'First name and Last name must contain only alphabets No special symbols No numbers'. The rule is active. The validation rule detail section includes fields for Rule Name, Error Condition Formula, Error Message, Description, Created By, Modified By, and Active status. The created by field shows 'Harsha Hargunani, 12/09/2023, 10:34 pm' and modified by shows 'Harsha Hargunani, 12/09/2023, 10:40 pm'.

The screenshot shows a new record creation page for 'Student Details'. The 'First Name' field contains 'Leo%' and the 'Last Name' field contains 'Thames7'. A red error message box appears stating 'We hit a snag.' with the sub-instruction 'Review the errors on this page.' and a list of validation errors: 'First name and Last name must contain only alphabets No special symbols No numbers'. The page includes fields for 'Last Name', 'DOB', 'Phone No', and buttons for 'Cancel', 'Save & New', and 'Save'.

## Q19. Prevent applicants from submitting invalid Email ID.

Ans.

The screenshot shows the Salesforce Object Manager interface. On the left, under the 'Object Manager' tab, there is a section titled 'Student Details Validation Rule'. It displays the following details:

Validation Rule Detail	Edit	Clone
Rule Name: No_invalid_email_id	Active	<input checked="" type="checkbox"/>
Error Condition Formula: NOT( REGEX( Email_ID__c, "^(a-zA-Z0-9_\\-\\.)+@([a-zA-Z0-9_\\-\\.]+)\\.(a-zA-Z){2,5}\$" ) )		
Error Message: Please enter a valid email address	Error Location	Email ID
Description:		
Created By: Harsha Hargunani, 12/09/2023, 10:51 pm	Modified By	Harsha Hargunani, 12/09/2023, 10:51 pm

A sidebar on the right shows the user profile of Harsha Hargunani and various settings like 'DISPLAY DENSITY' set to 'Comfy' and 'Compact'.

The screenshot shows the Salesforce Lightning Experience. A modal window titled 'Information' is displayed, indicating an error: 'We hit a snag.' Below the message, it says 'Review the following fields' and lists 'Email ID'. The 'Email ID' field contains 'k\_thames@gmail' and has a validation message: 'Email ID: invalid email address: k\_thames@gmail'. The modal also includes 'Cancel', 'Save & New', and 'Save' buttons.