Project Overview:

In this project, you are going to create various custom objects and fields to implement and enforce a flow for your organization as per the problem statement provided. Also, you will implement validation rules, workflows, and process builder for your custom objects. Finally, you will be going to activate the flow for your organization.

Problem Statement:

In this project, initially you will first create the basic components (objects, fields, etc.) for the business process that you want to add in Salesforce using flows. Further, after creating the components for the basic layout of the flow you will be going to create a flow with various actions along with workflow rules and actions, validation rules, process builder, and flow builder. Then, add the flow into the action by activating it.

Environment: Salesforce Developer Platform

Domain: Social

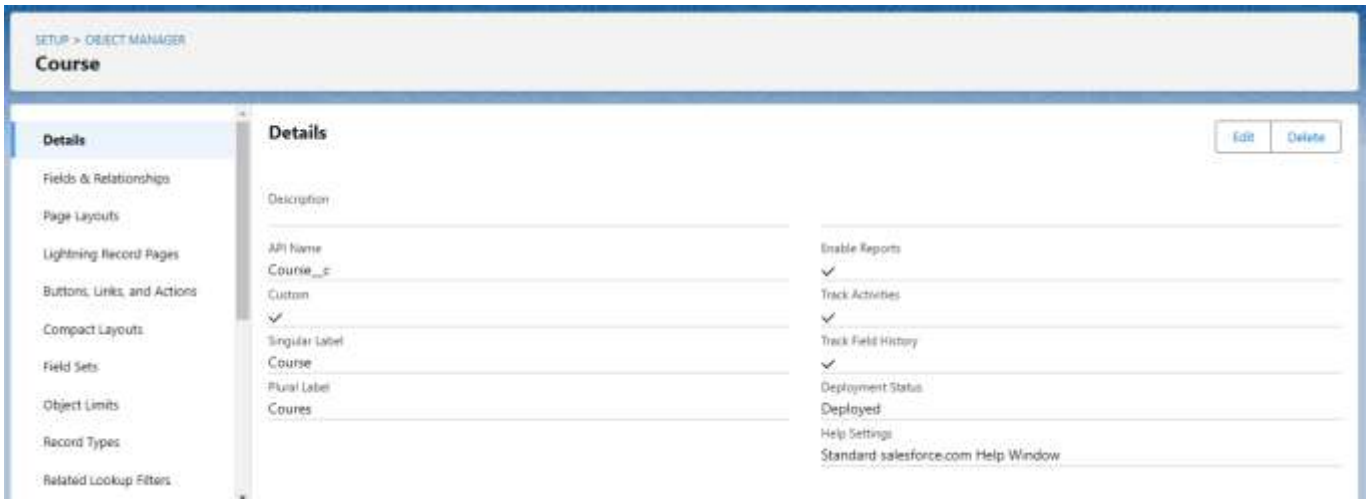
Tasks To Be Done:

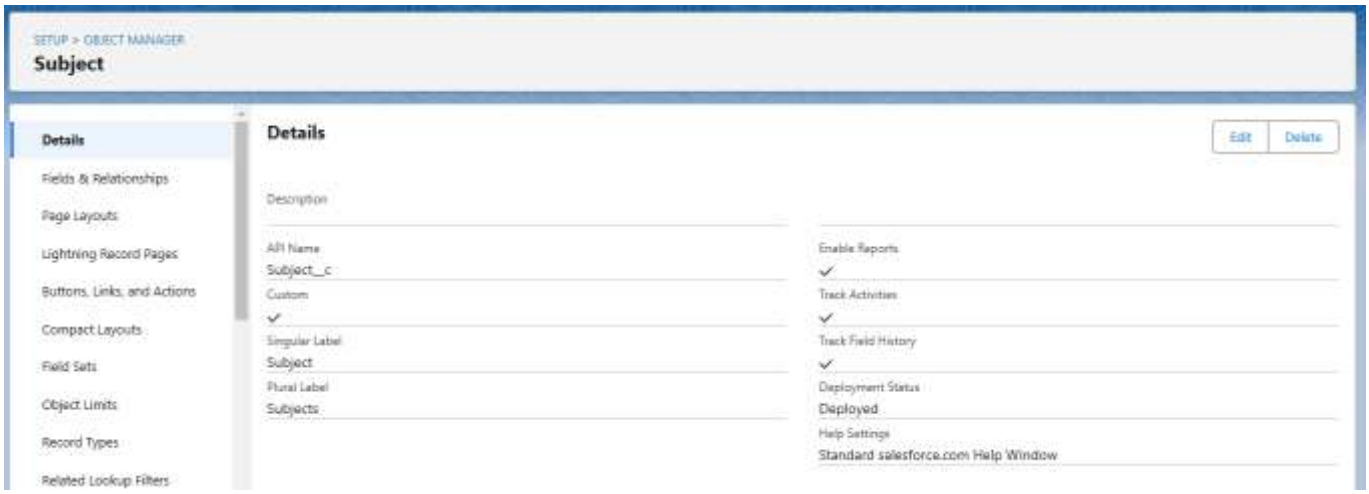
1. **Object Creation:** Here, your task is to create objects for the flow.
   A. Create custom object named:
      a. Course
      b. Subjects
      c. Course Leads
      d. Technology
2. **Field Creation:** Here, your task is to create fields related to all the objects created in the 1st part of the tasks.
   A. Course:
      a. Course Name
      b. No. of Modules
      c. Course Duration
      d. Rating
      e. Active
      f. Instructor Name
      g. Type of Course
      h. Priority
      i. Start Date
      j. End Date
   B. Subject:
      a. Subject Name
      b. No. of Modules
      c. Instructor Name
      d. Rating
      e. Priority
      f. Category
      g. Level
   C. Course Leads:
      a. First Name
      b. Last Name
      c. Phone
      d. Email
      e. Source
      f. Category
      g. Rating
      h. Currency
      i. Course Lead Amount
   D. Technology
      a. Name
      b. Type
      c. Category
      d. Rating
      e. Active
      f. Instructor Name
      i. Mobile
      ii. Email
      iii. Qualification
      iv. Availability

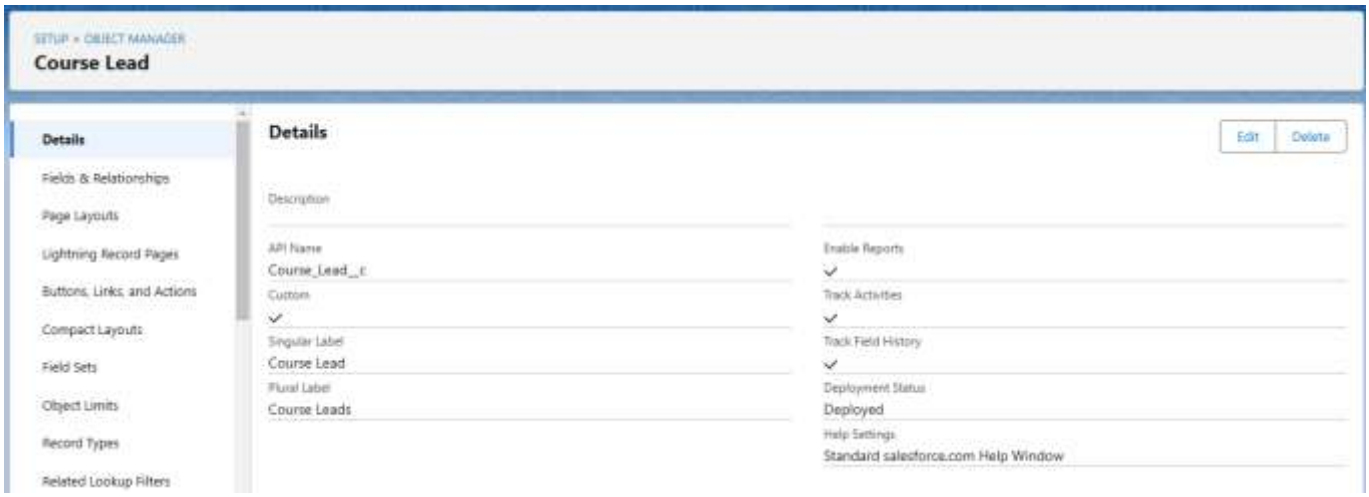
3. Add Validation Rules for verifying data:
   a. Add validation rule for every field to verify that the fields are not empty for the objects:
      - Course
      - Subjects
      - Course Leads
      - Technology
4. Set Workflow rules for all the custom objects created.
   a. The workflow rules should be created in such a way that it should update the data after the following criteria is met:
      - If the priority of course is high, then update the course name to 'High Priority'+ Course Name.
      - If the course lead amount is greater than USD $1000 then update the name field to 'Top Priority Customer'+ Name.
5. Create a flow using the below scenario for creating a Case.
   a. First, the user should enter the following fields in the case:
      - Name
      - Phone
      - Email
      - Course Enrolled
      - Subject
      - Instructor Name
      - Query Description

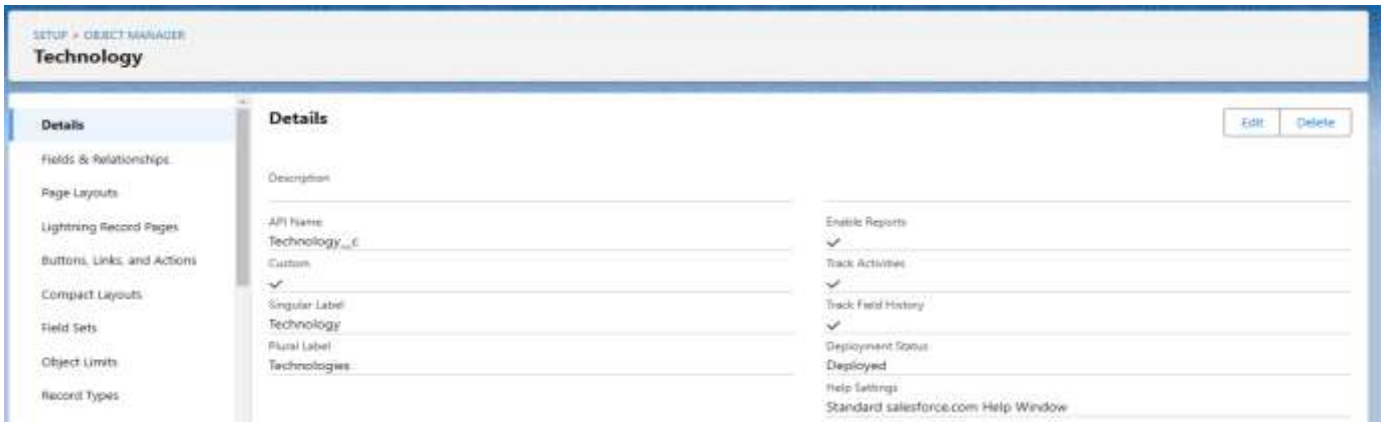
After the case is created, assign the case to the course instructor. If the instructor is unavailable, assign it to a specific executive of the company. Further, when the query is resolved, update the Case as 'Resolved'.

1. Object Creation

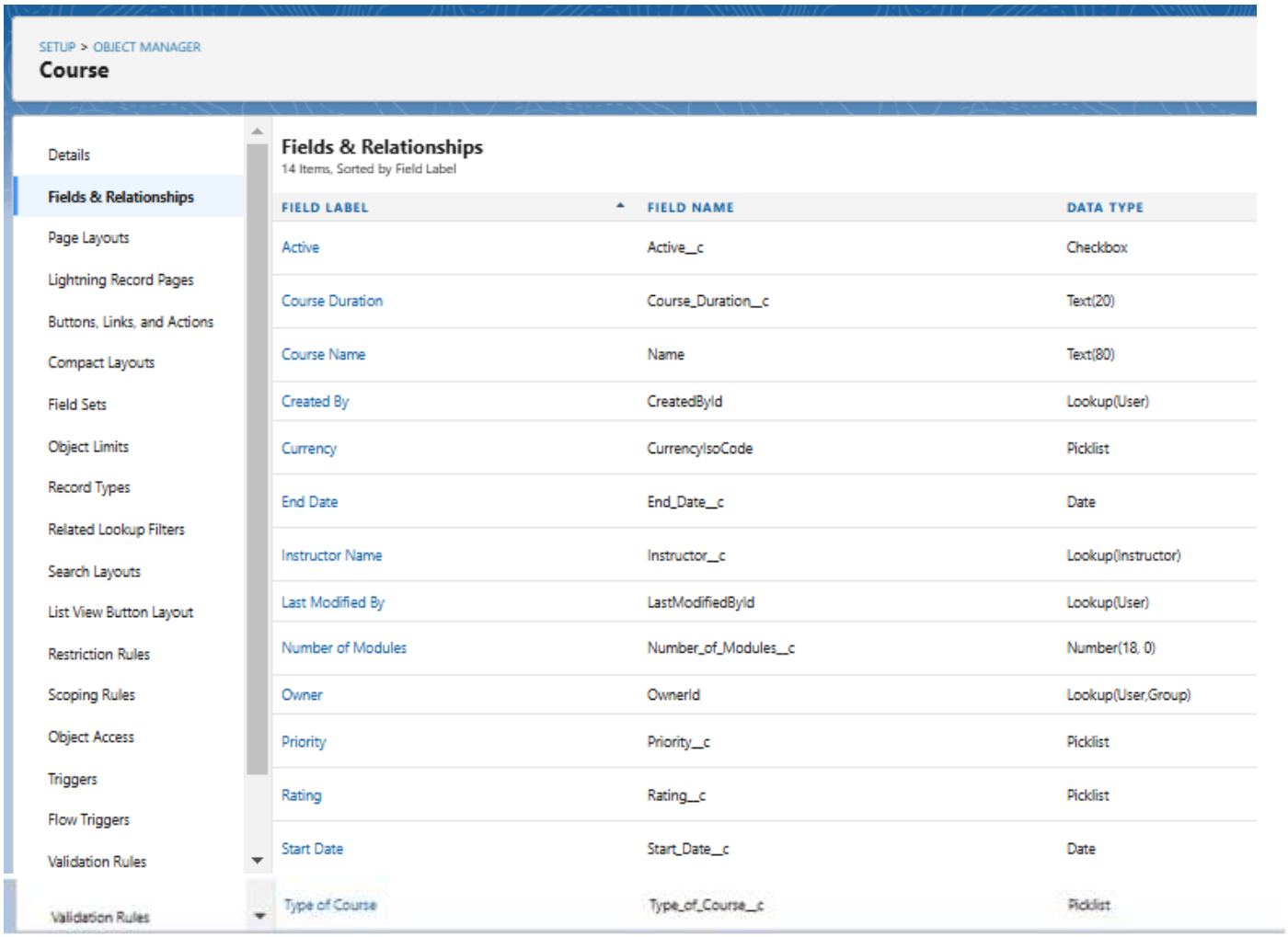








2. Field Creation



SETUP > OBJECT MANAGER

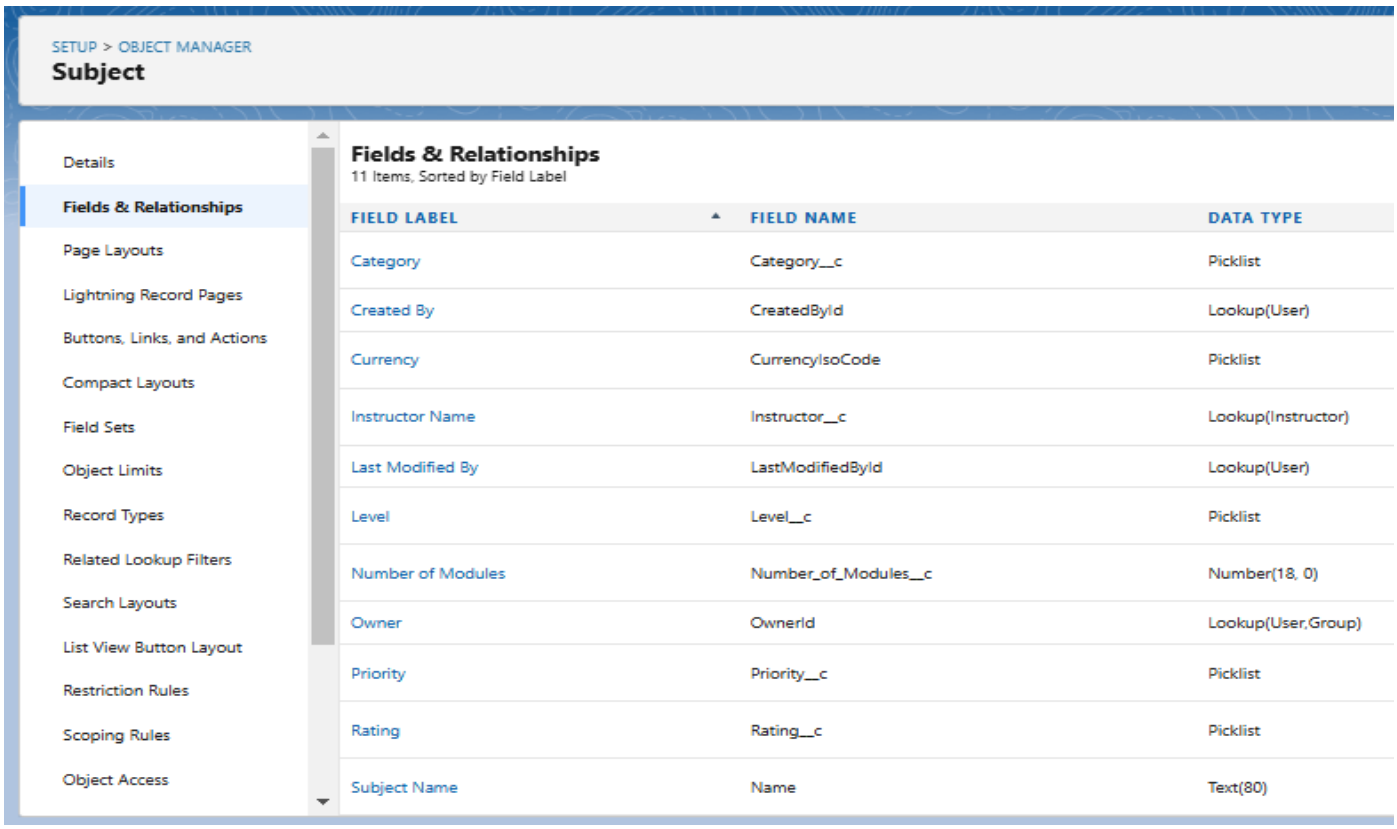
Course

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules

Fields & Relationships

14 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Active	Active__c	Checkbox
Course Duration	Course_Duration__c	Text(20)
Course Name	Name	Text(80)
Created By	CreatedById	Lookup(User)
Currency	CurrencyIsoCode	Picklist
End Date	End_Date__c	Date
Instructor Name	Instructor__c	Lookup(Instructor)
Last Modified By	LastModifiedById	Lookup(User)
Number of Modules	Number_of_Modules__c	Number(18, 0)
Owner	OwnerId	Lookup(User,Group)
Priority	Priority__c	Picklist
Rating	Rating__c	Picklist
Start Date	Start_Date__c	Date
Type of Course	Type_of_Course__c	Picklist



SETUP > OBJECT MANAGER

Subject

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access

Fields & Relationships

11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Category	Category__c	Picklist
Created By	CreatedById	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Instructor Name	Instructor__c	Lookup(Instructor)
Last Modified By	LastModifiedById	Lookup(User)
Level	Level__c	Picklist
Number of Modules	Number_of_Modules__c	Number(18, 0)
Owner	OwnerId	Lookup(User,Group)
Priority	Priority__c	Picklist
Rating	Rating__c	Picklist
Subject Name	Name	Text(80)

SETUP > OBJECT MANAGER

Course Lead

- Details
- **Fields & Relationships**
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers

Fields & Relationships

12 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Category	Category__c	Picklist
Course Lead Amount	Course_Lead_Amount__c	Currency(18, 0)
Created By	CreatedById	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Email	Email__c	Email
First Name	Name	Text(80)
Last Modified By	LastModifiedById	Lookup(User)
Last Name	Last_Name__c	Text(20)
Owner	OwnerId	Lookup(User,Group)
Phone	Phone__c	Phone
Rating	Rating__c	Picklist
Source	Source__c	Picklist

SETUP > OBJECT MANAGER

Technology

- Details
- **Fields & Relationships**
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Fields & Relationships

10 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Active	Active__c	Checkbox
Category	Category__c	Picklist
Created By	CreatedById	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Instructor Name	Instructor__c	Lookup(Instructor)
Last Modified By	LastModifiedById	Lookup(User)
Name	Name	Text(80)
Owner	OwnerId	Lookup(User,Group)
Rating	Rating__c	Picklist
Type	Type__c	Picklist

Course Validation Rule

Back to Course

Validation Rule Detail

Edit Clone

Rule Name	Feilds_mandatory_for_courses	Active	✓
Error Condition Formula	OR(ISBLANK(Name), ISBLANK(Number_of_Modules__c), ISBLANK(Course_Duration__c), ISPICKVAL(Rating__c , ""), ISBLANK(Instructor__c), ISBLANK(Start_Date__c), ISBLANK(End_Date__c), ISPICKVAL(Type_of_Course__c , ""), ISPICKVAL(Priority__c , ""))		
Error Message	All fields are mandatory.	Error Location	Top of Page
Description			
Created By	Meenakshi Pillai, 29/06/2024, 9:52 pm	Modified By	Meenakshi Pillai, 29/06/2024, 10:43 pm

Edit Clone

Subject Validation Rule

Back to Subject

Validation Rule Detail

Edit Clone

Rule Name	Feilds_mandatory_for_subject	Active	✓
Error Condition Formula	OR(ISBLANK(Name), ISBLANK(Number_of_Modules__c), ISBLANK(Instructor__c), ISPICKVAL(Rating__c , ""), ISPICKVAL(Category__c , ""), ISPICKVAL(Priority__c , ""), ISPICKVAL(Level__c , ""))		
Error Message	All fields are mandatory.	Error Location	Top of Page
Description			
Created By	Meenakshi Pillai, 29/06/2024, 9:59 pm	Modified By	Meenakshi Pillai, 29/06/2024, 10:44 pm

Edit Clone

Course Lead Validation Rule

Back to Course Lead

Validation Rule Detail

Edit Clone

Rule Name	Feilds_mandatory_for_course_lead	Active	✓
Error Condition Formula	OR(ISBLANK(Name), ISBLANK(Last_Name__c), ISBLANK(Phone__c), ISBLANK(Email__c), ISPICKVAL(Rating__c, ""), ISBLANK(Course_Lead_Amount__c), ISPICKVAL(Source__c , ""), ISPICKVAL(Category__c , ""), ISPICKVAL(CurrencyIsoCode , ""))		
Error Message	All fields are mandatory.	Error Location	Top of Page
Description			
Created By	Meenakshi Pillai, 29/06/2024, 10:13 pm	Modified By	Meenakshi Pillai, 29/06/2024, 10:46 pm

Edit Clone

Technology Validation Rule

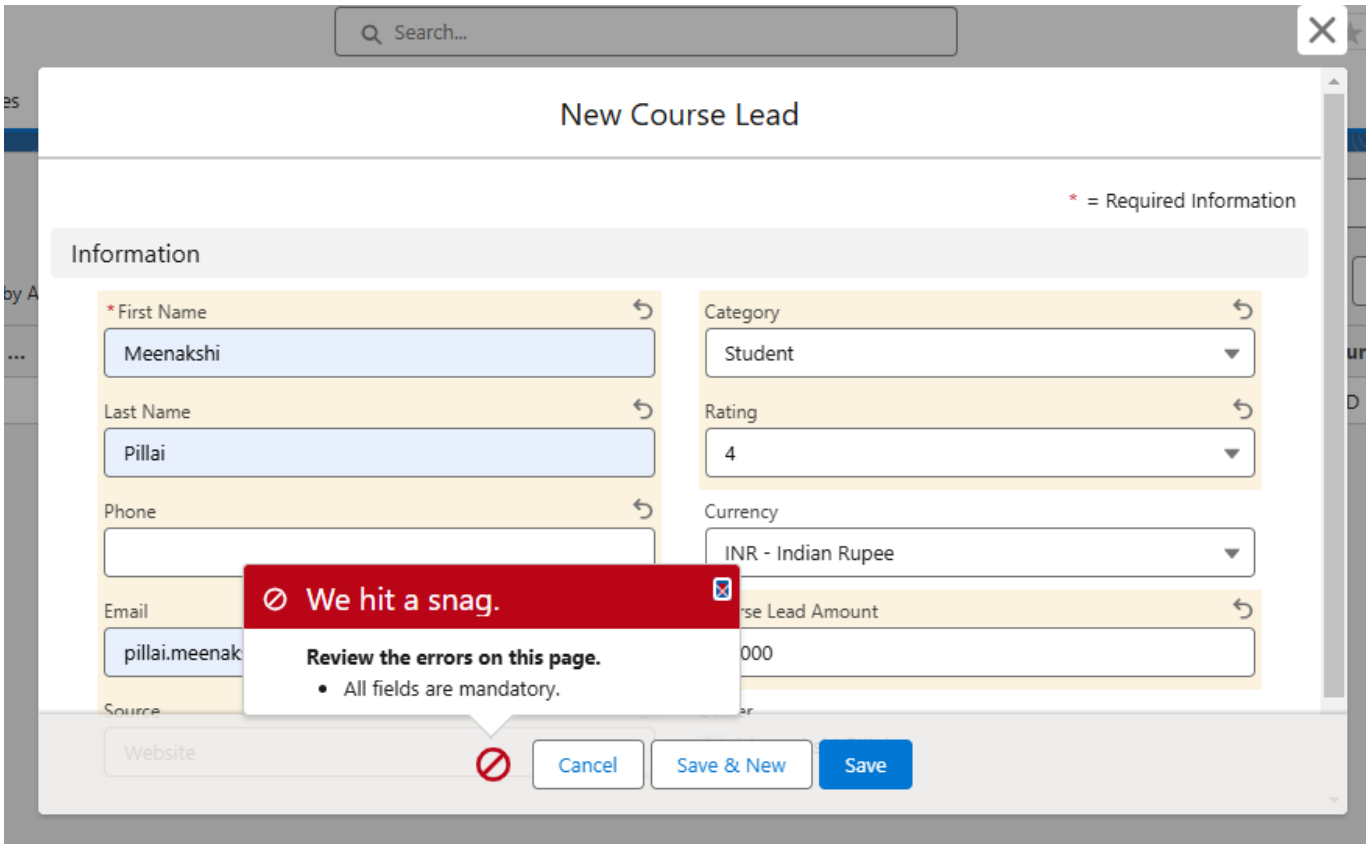
Back to Technology

Validation Rule Detail

Edit Clone

Rule Name	Feilds_mandatory_for_technology	Active	✓
Error Condition Formula	OR(ISBLANK(Name), ISPICKVAL(Type__c , ""), ISPICKVAL(Category__c, ""), ISPICKVAL(Rating__c, ""), ISBLANK(Instructor__r.Name), ISBLANK(Instructor__r.Mobile__c), ISBLANK(Instructor__r.Email__c), ISBLANK(Instructor__r.Qualification__c))		
Error Message	All fields are mandatory.	Error Location	Top of Page
Description			
Created By	Meenakshi Pillai, 29/06/2024, 10:26 pm	Modified By	Meenakshi Pillai, 19/12/2024, 8:38 pm

Edit Clone



Workflow Rule

High Priority Course

Help for this Page

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. Tell Me More | Migrate your workflow rules to flows

Workflow Rule Detail

Edit | Clone | Deactivate

Rule Name	High Priority Course	Object	Course
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	Course: Priority EQUALS High		
Created By	Meenakshi Pillai, 23/06/2024, 9:30 pm	Modified By	Meenakshi Pillai, 04/02/2025, 5:08 pm

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Field Update	Update course name

Field Update

Update course name

Help for this Page

Rules Using This Field Update (1) | Approval Processes Using This Field Update (0) | Entitlement Processes Using This Field Update (0)

Field Update Detail

Edit | Delete

Name	Update course name
Unique Name	Update_course_name
Description	
Object	Course
Field to Update	Course: Course Name
Field Data Type	Text
Re-evaluate Workflow Rules after Field Change	
Formula Value	"High Priority " + Name

Edit | Delete

Rules Using This Field Update

Rules Using This Field Update Help

Action	Rule Name	Description	Object	Active
Edit | Del | Deactivate	High Priority Course		Course	✓

Search...

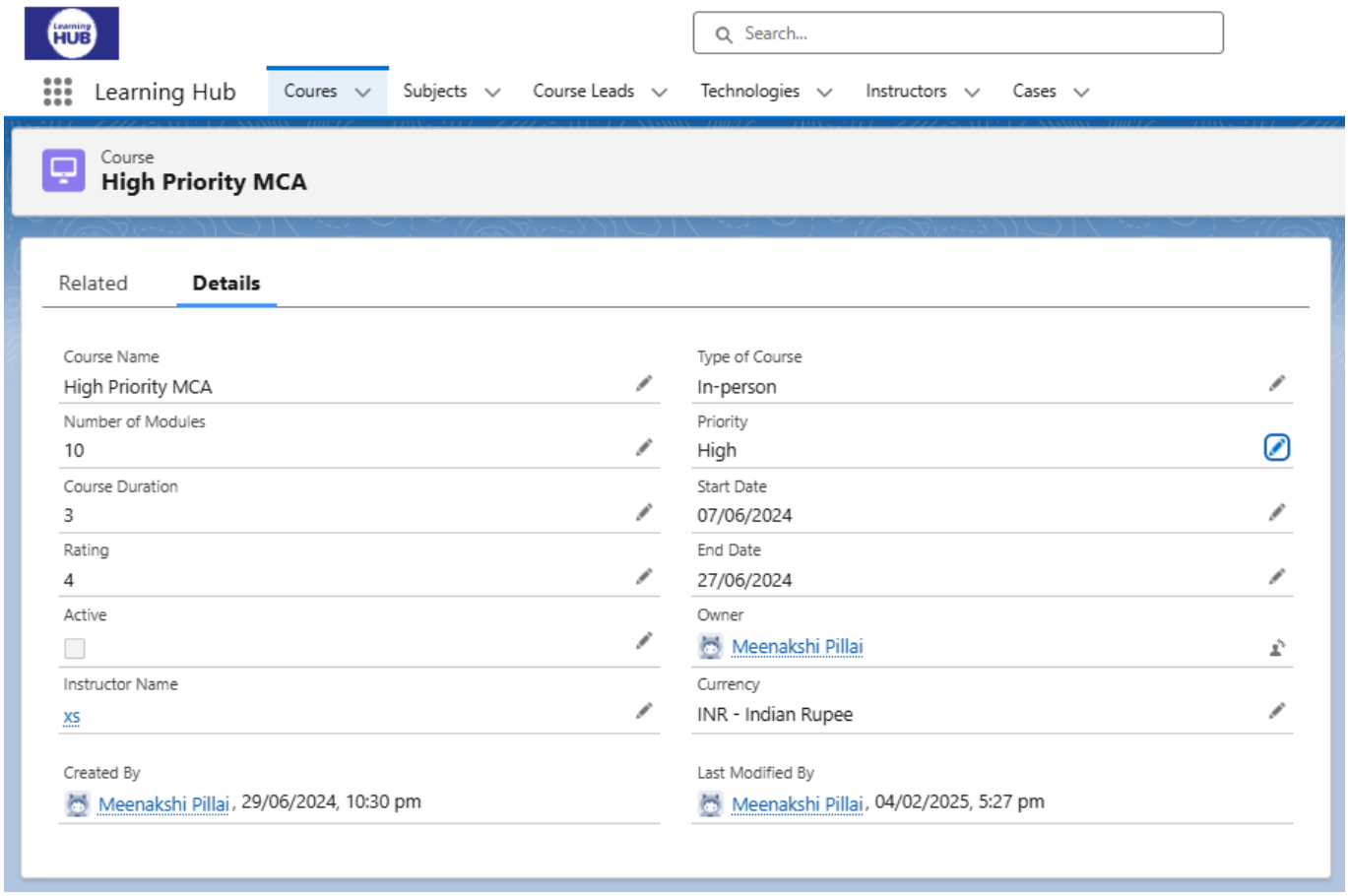
Learning Hub | Coures | Subjects | Course Leads | Technologies | Instructors | Cases

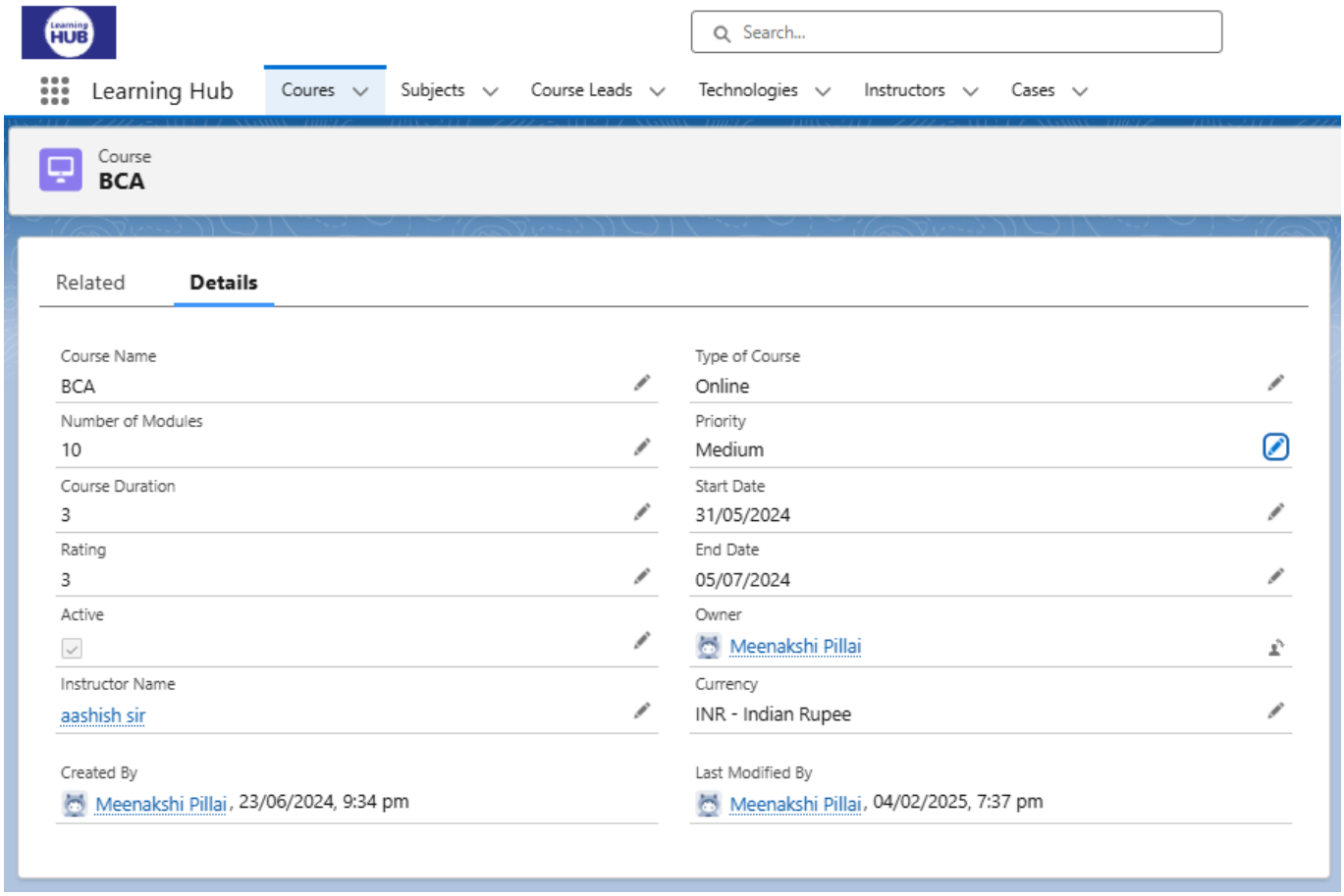
Course

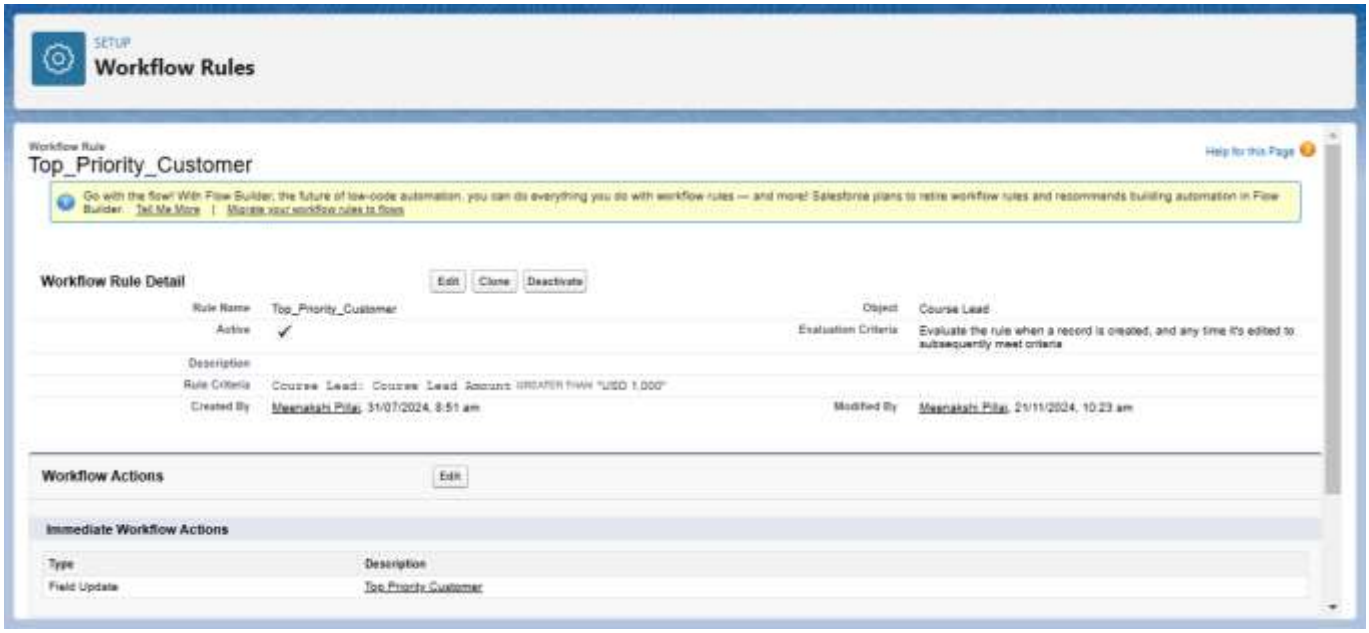
MCA

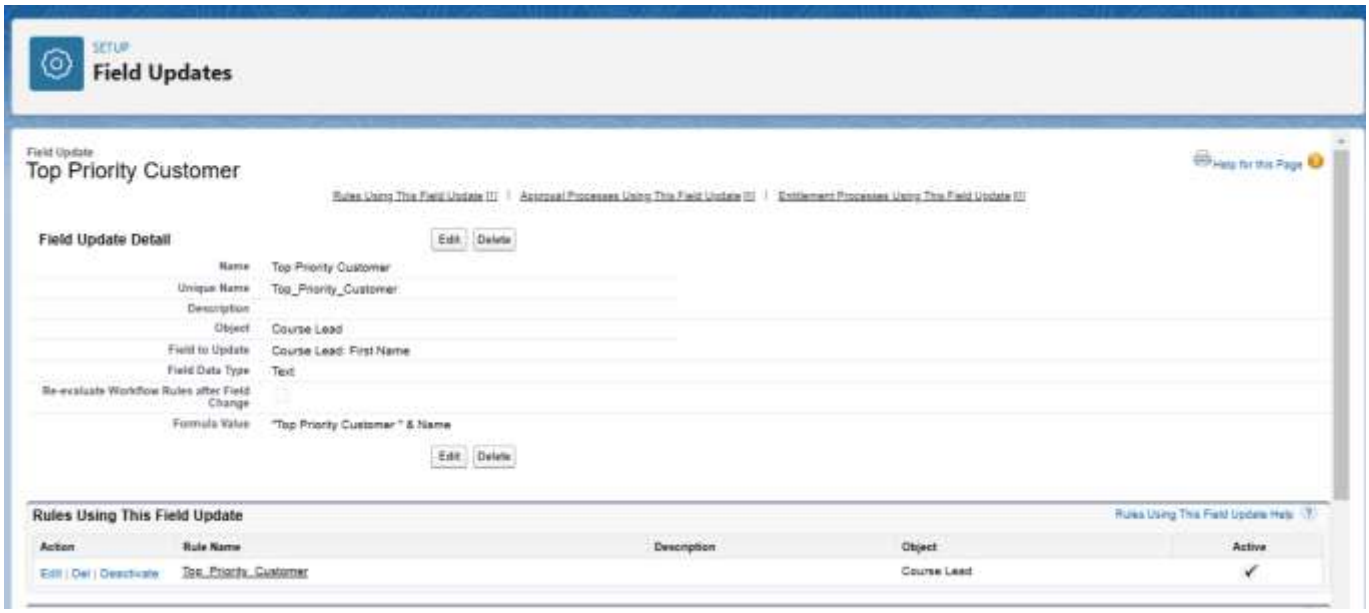
Related | **Details**

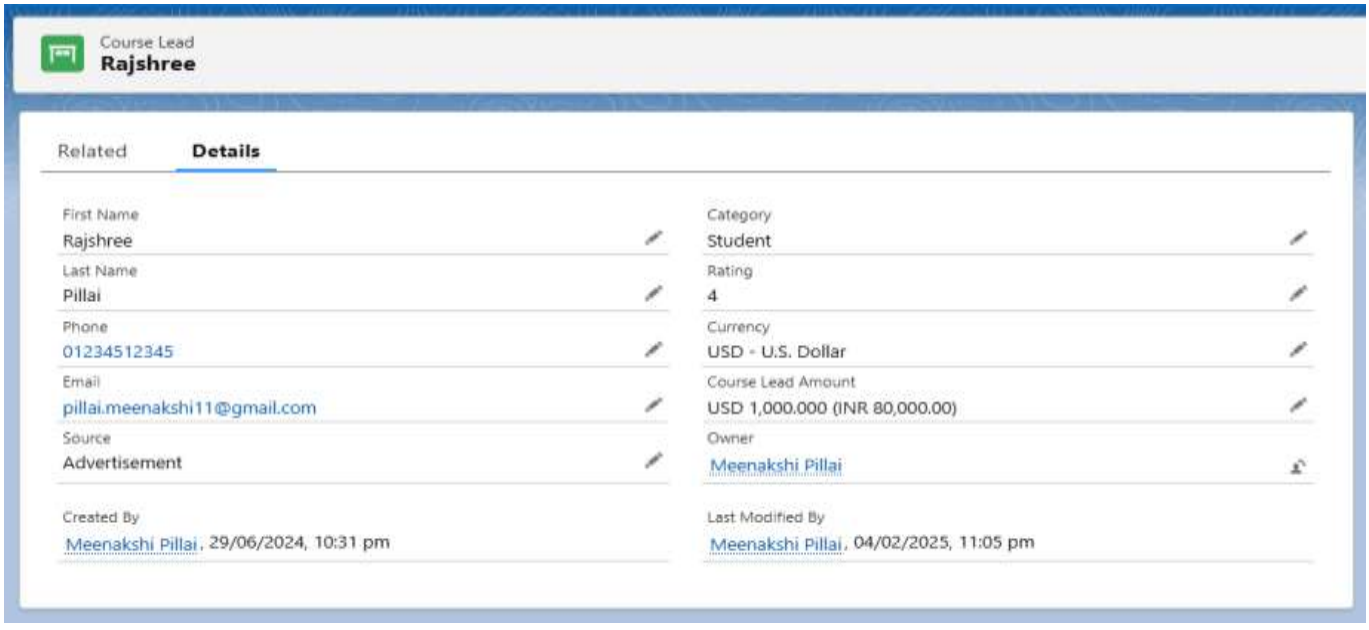
Course Name: MCA	Type of Course: In-person
Number of Modules: 10	Priority: Low
Course Duration: 3	Start Date: 07/06/2024
Rating: 4	End Date: 27/06/2024
Active: ☐	Owner: Meenakshi Pillai
Instructor Name: xs	Currency: INR - Indian Rupee
Created By: Meenakshi Pillai, 29/06/2024, 10:30 pm	Last Modified By: Meenakshi Pillai, 04/02/2025, 5:26 pm

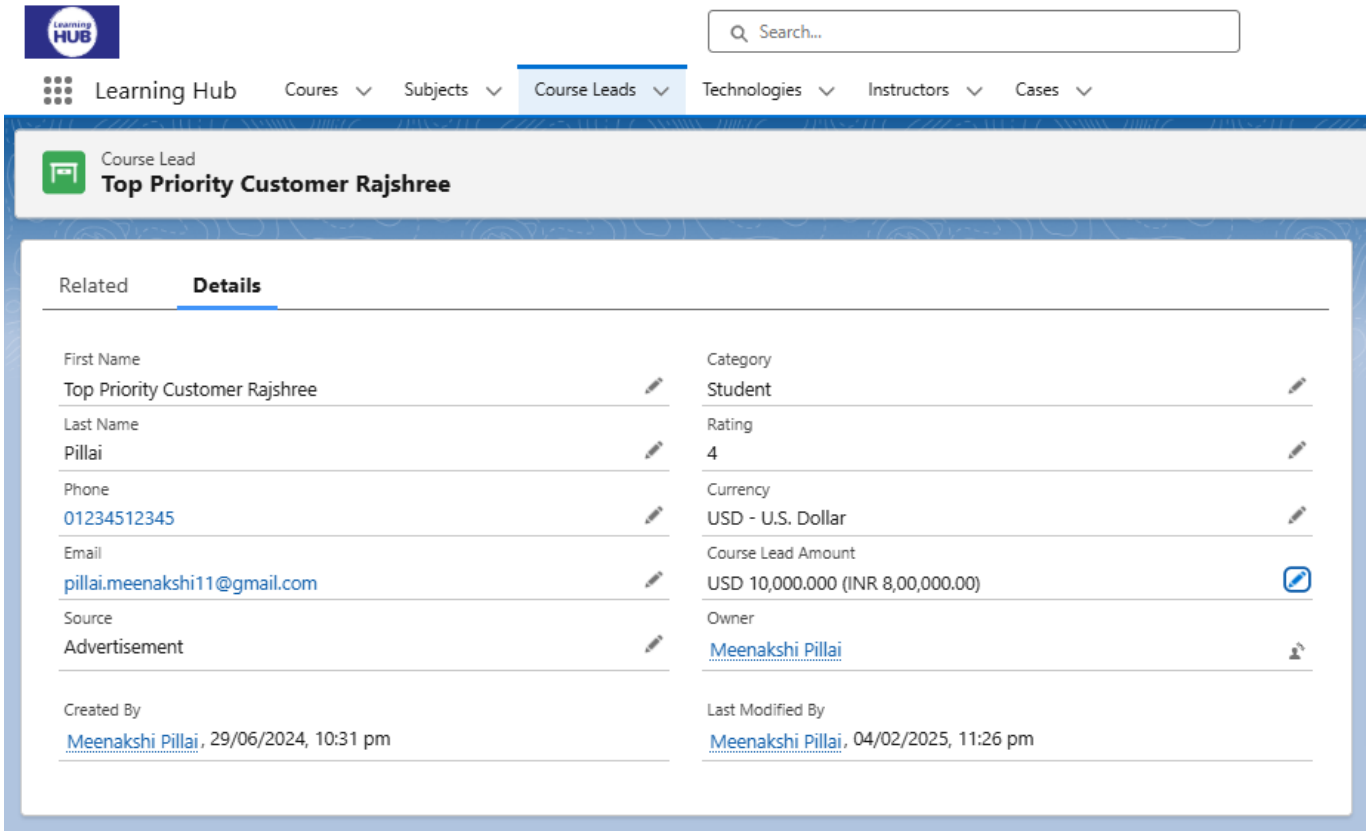

Search...
Learning Hub
Coures
Subjects
Course Leads
Technologies
Instructors
Cases
Course
High Priority MCA
Related
Details
Course Name
High Priority MCA
Type of Course
In-person
Number of Modules
10
Priority
High
Course Duration
3
Start Date
07/06/2024
Rating
4
End Date
27/06/2024
Active
Owner
Meenakshi Pillai
Instructor Name
xs
Currency
INR - Indian Rupee
Created By
Meenakshi Pillai, 29/06/2024, 10:30 pm
Last Modified By
Meenakshi Pillai, 04/02/2025, 5:27 pm

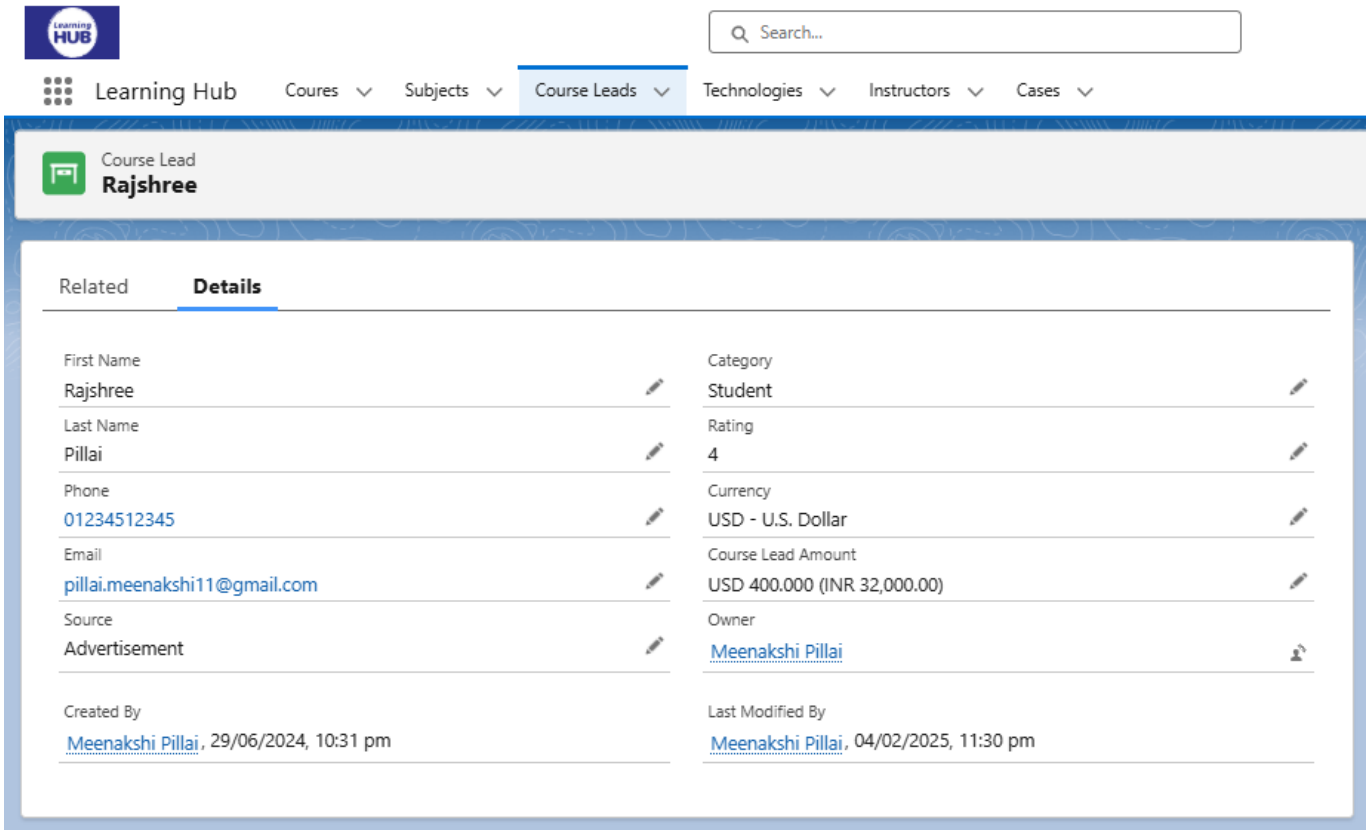

Search...
Learning Hub
Coures
Subjects
Course Leads
Technologies
Instructors
Cases
Course
BCA
Related
Details
Course Name
BCA
Type of Course
Online
Number of Modules
10
Priority
Medium
Course Duration
3
Start Date
31/05/2024
Rating
3
End Date
05/07/2024
Active
Owner
Meenakshi Pillai
Instructor Name
aashish sir
Currency
INR - Indian Rupee
Created By
Meenakshi Pillai, 23/06/2024, 9:34 pm
Last Modified By
Meenakshi Pillai, 04/02/2025, 7:37 pm


SETUP
Workflow Rules
Workflow Rule
Top_Priority_Customer
Help for this Page
Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. Tell Me More | Migrate your workflow rules to flows
Workflow Rule Detail
Edit
Clone
Deactivate
Rule Name
Top_Priority_Customer
Object
Course Lead
Active
Evaluation Criteria
Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description
Rule Criteria
Course Lead: Course Lead Amount GREATER THAN "USD 1,000"
Created By
Meenakshi Pillai, 31/07/2024, 8:51 am
Modified By
Meenakshi Pillai, 21/11/2024, 10:23 am
Workflow Actions
Edit
Immediate Workflow Actions
Type
Description
Field Update
Top Priority Customer

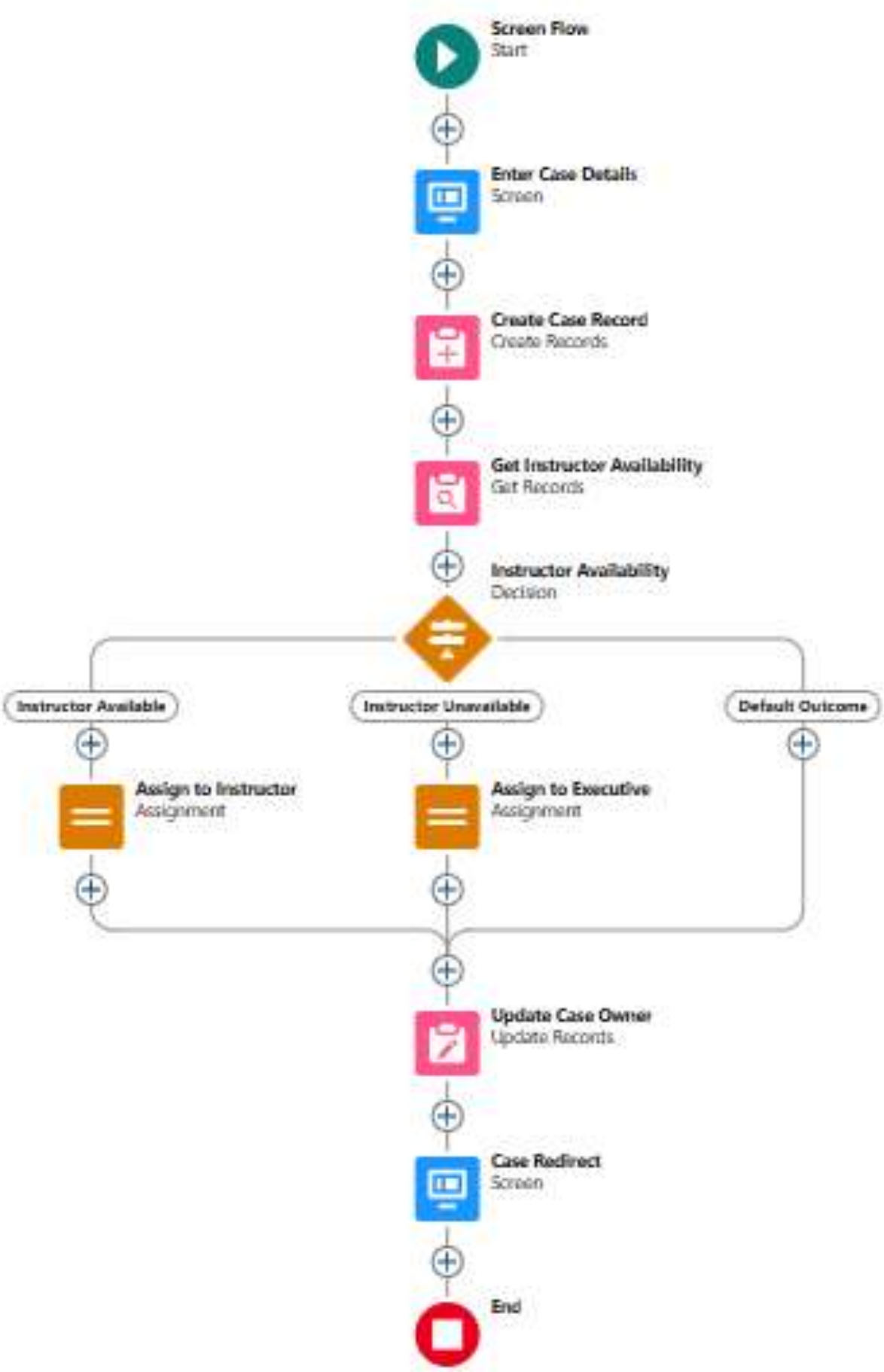

SETUP
Field Updates
Field Update
Top Priority Customer
Help for this Page
Rules Using This Field Update | Approval Processes Using This Field Update | Entitlement Processes Using This Field Update
Field Update Detail
Edit
Delete
Name
Top Priority Customer
Unique Name
Top_Priority_Customer
Description
Object
Course Lead
Field to Update
Course Lead: First Name
Field Data Type
Text
Re-evaluate Workflow Rules after Field Change
Formula Value
"Top Priority Customer " & Name
Edit
Delete
Rules Using This Field Update
Rules Using This Field Update Help
Action
Rule Name
Description
Object
Active
Edit | Del | Deactivate
Top_Priority_Customer
Course Lead

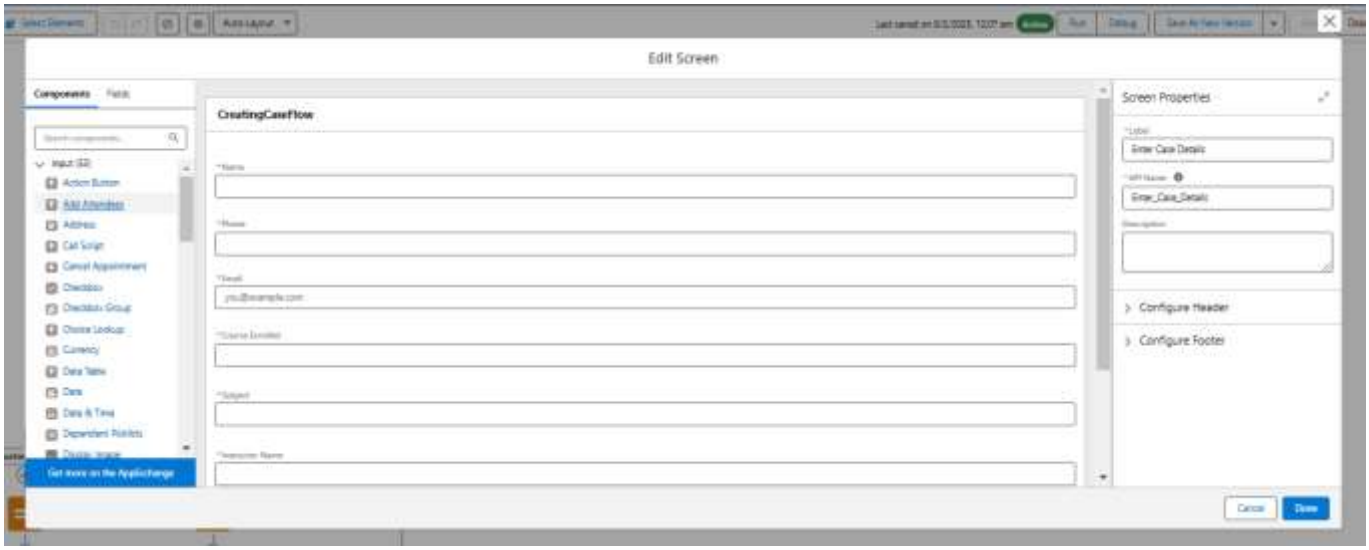

Course Lead
Rajshree
Related
Details
First Name
Rajshree
Last Name
Pillai
Phone
01234512345
Email
pillai.meenakshi11@gmail.com
Source
Advertisement
Category
Student
Rating
4
Currency
USD - U.S. Dollar
Course Lead Amount
USD 1,000.000 (INR 80,000.00)
Owner
Meenakshi Pillai
Created By
Meenakshi Pillai, 29/06/2024, 10:31 pm
Last Modified By
Meenakshi Pillai, 04/02/2025, 11:05 pm


Search...
Learning Hub
Coures
Subjects
Course Leads
Technologies
Instructors
Cases
Course Lead
Top Priority Customer Rajshree
Related
Details
First Name
Top Priority Customer Rajshree
Last Name
Pillai
Phone
01234512345
Email
pillai.meenakshi11@gmail.com
Source
Advertisement
Category
Student
Rating
4
Currency
USD - U.S. Dollar
Course Lead Amount
USD 10,000.000 (INR 8,00,000.00)
Owner
Meenakshi Pillai
Created By
Meenakshi Pillai, 29/06/2024, 10:31 pm
Last Modified By
Meenakshi Pillai, 04/02/2025, 11:26 pm


Search...
Learning Hub
Coures
Subjects
Course Leads
Technologies
Instructors
Cases
Course Lead
Rajshree
Related
Details
First Name
Rajshree
Last Name
Pillai
Phone
01234512345
Email
pillai.meenakshi11@gmail.com
Source
Advertisement
Category
Student
Rating
4
Currency
USD - U.S. Dollar
Course Lead Amount
USD 400.000 (INR 32,000.00)
Owner
Meenakshi Pillai
Created By
Meenakshi Pillai, 29/06/2024, 10:31 pm
Last Modified By
Meenakshi Pillai, 04/02/2025, 11:30 pm

5.


Screen Flow
Start
Enter Case Details
Screen
Create Case Record
Create Records
Get Instructor Availability
Get Records
Instructor Availability
Decision
Instructor Available
Instructor Unavailable
Default Outcome
Assign to Instructor
Assignment
Assign to Executive
Assignment
Update Case Owner
Update Records
Case Redirect
Screen
End



Create Records

* Label: Create Case Record
* API Name: Create_Case_Record

Description

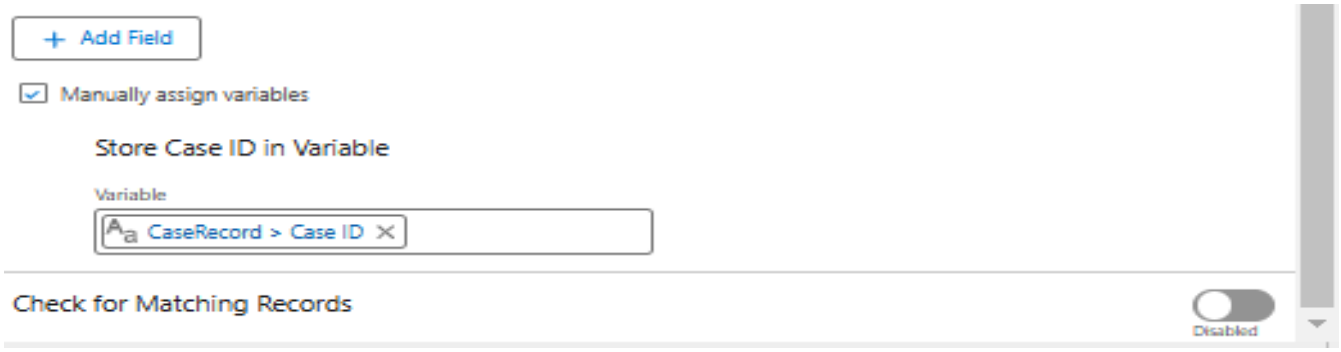
* How to set record field values: Manually

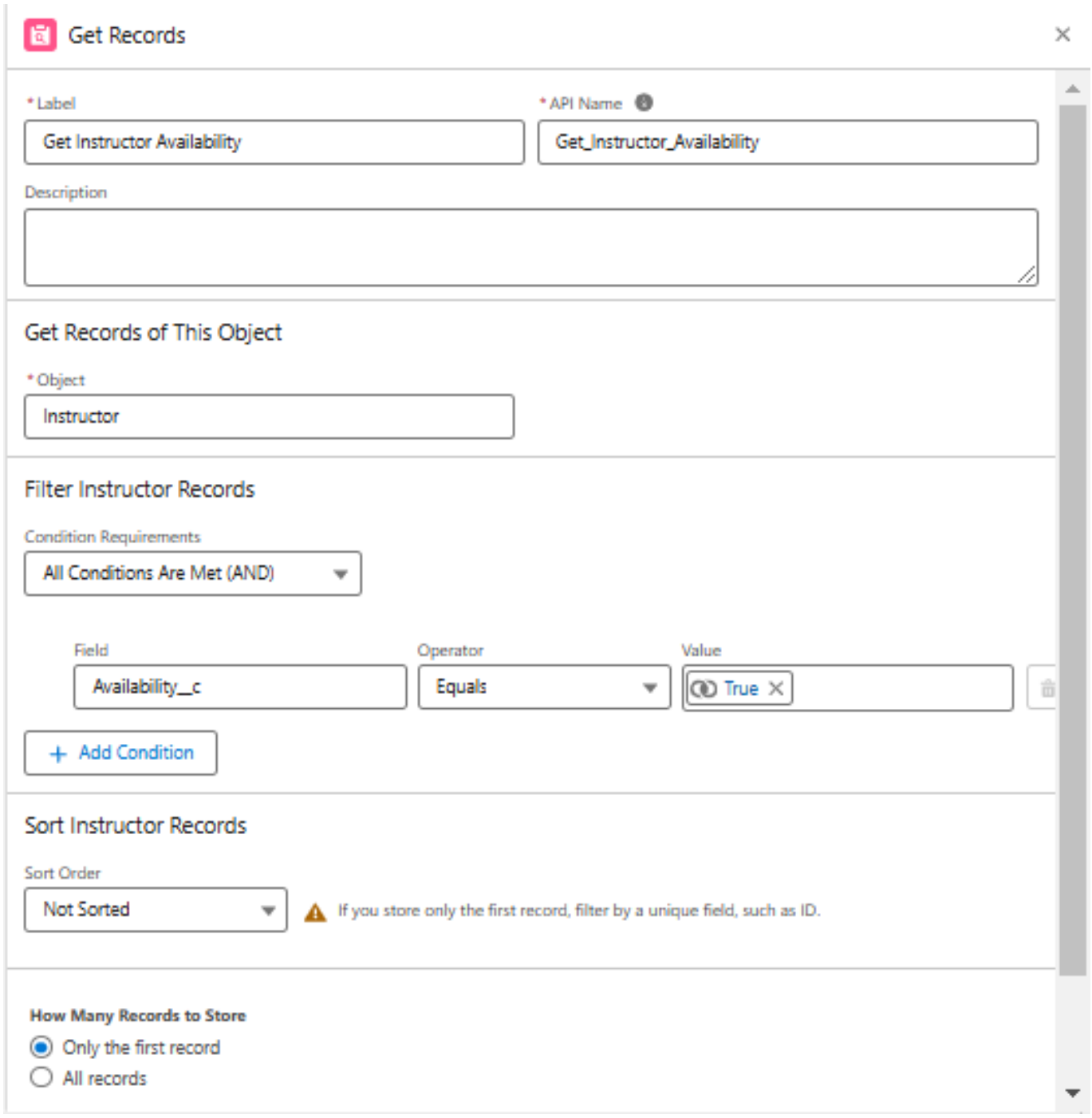
Create a Record of This Object

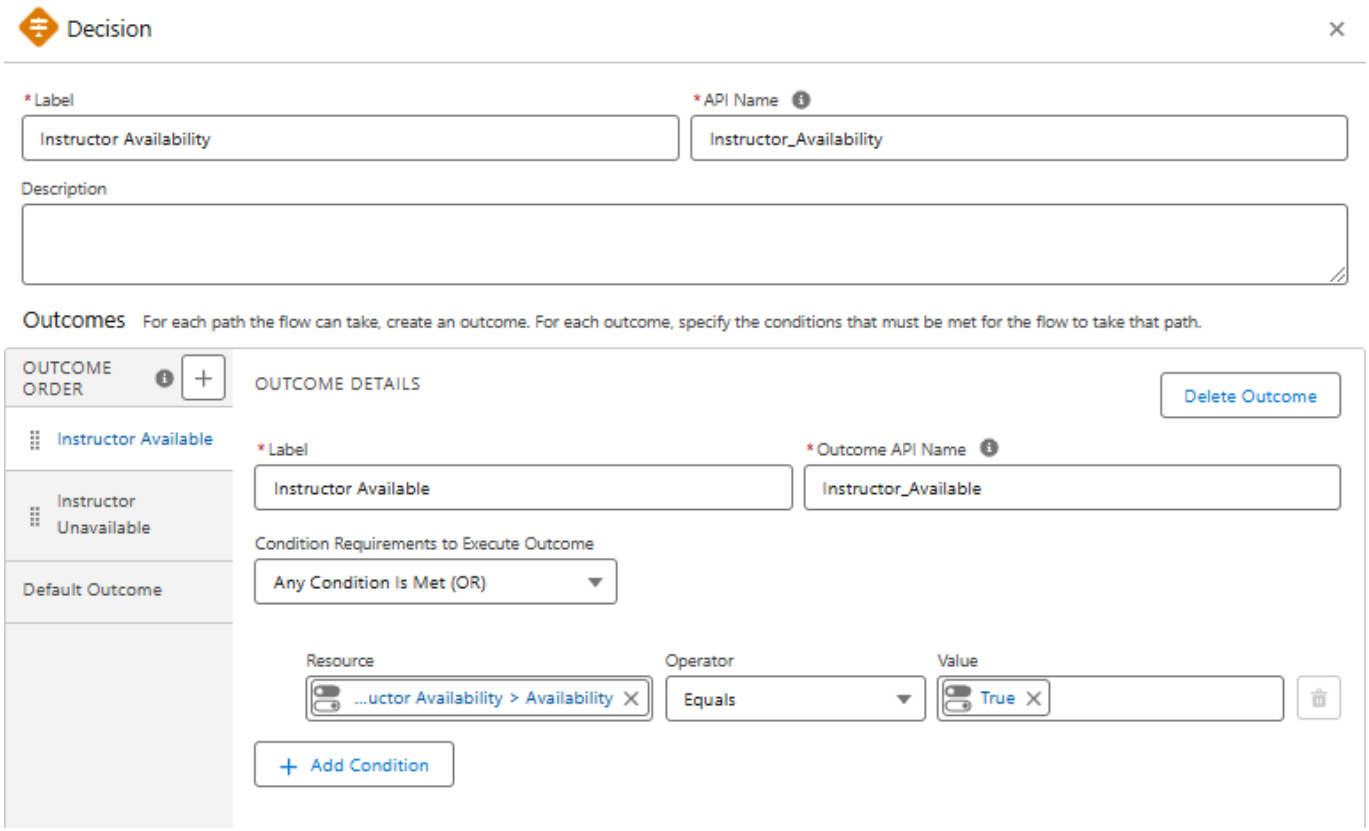
* Object: Case

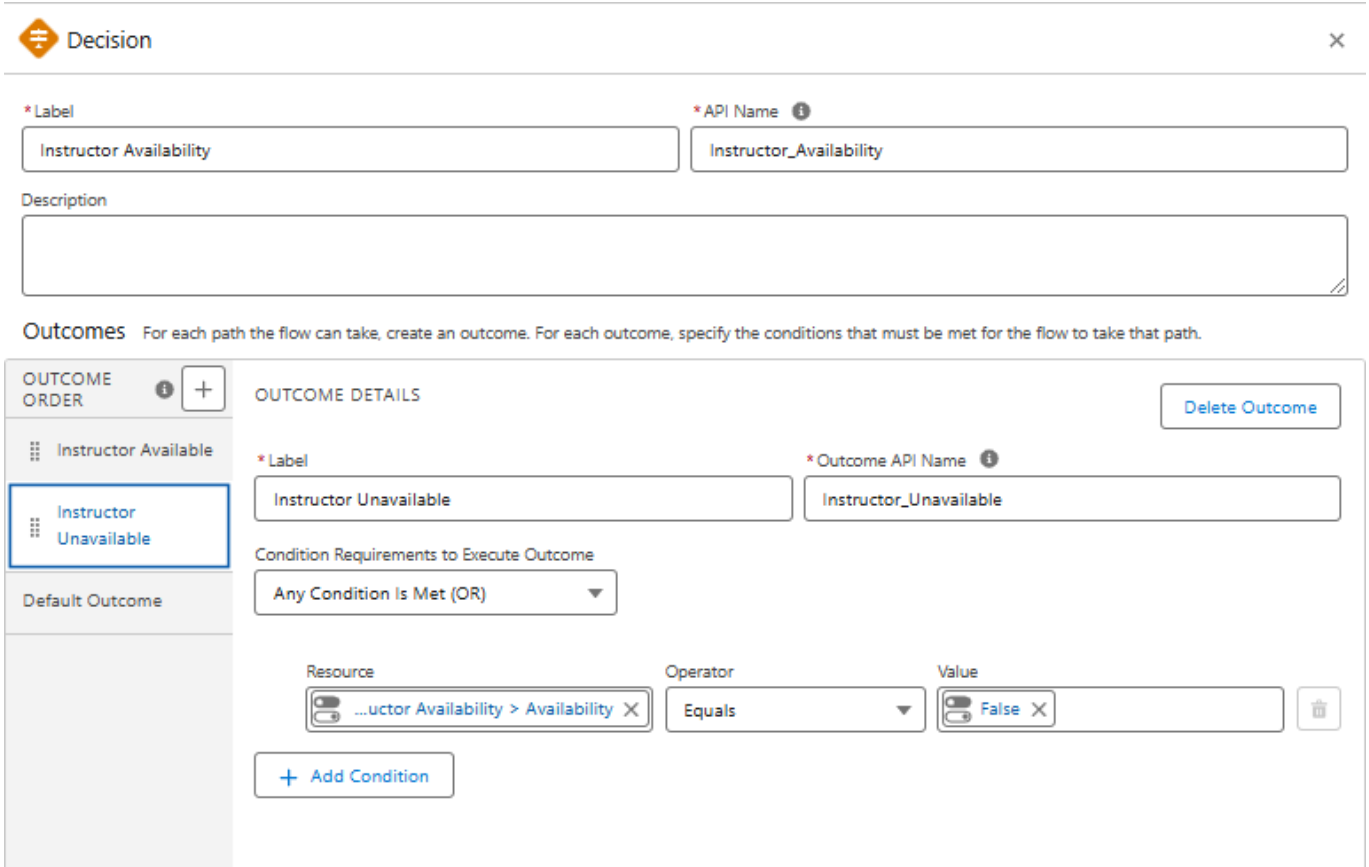
Set Field Values for the Case

Field	Value
Description	Enter Case Details > Query Description
Subject	Enter Case Details > Subject
Email Address	Enter Case Details > Email > Value
Name	Enter Case Details > Name
Phone	Enter Case Details > Phone > Value

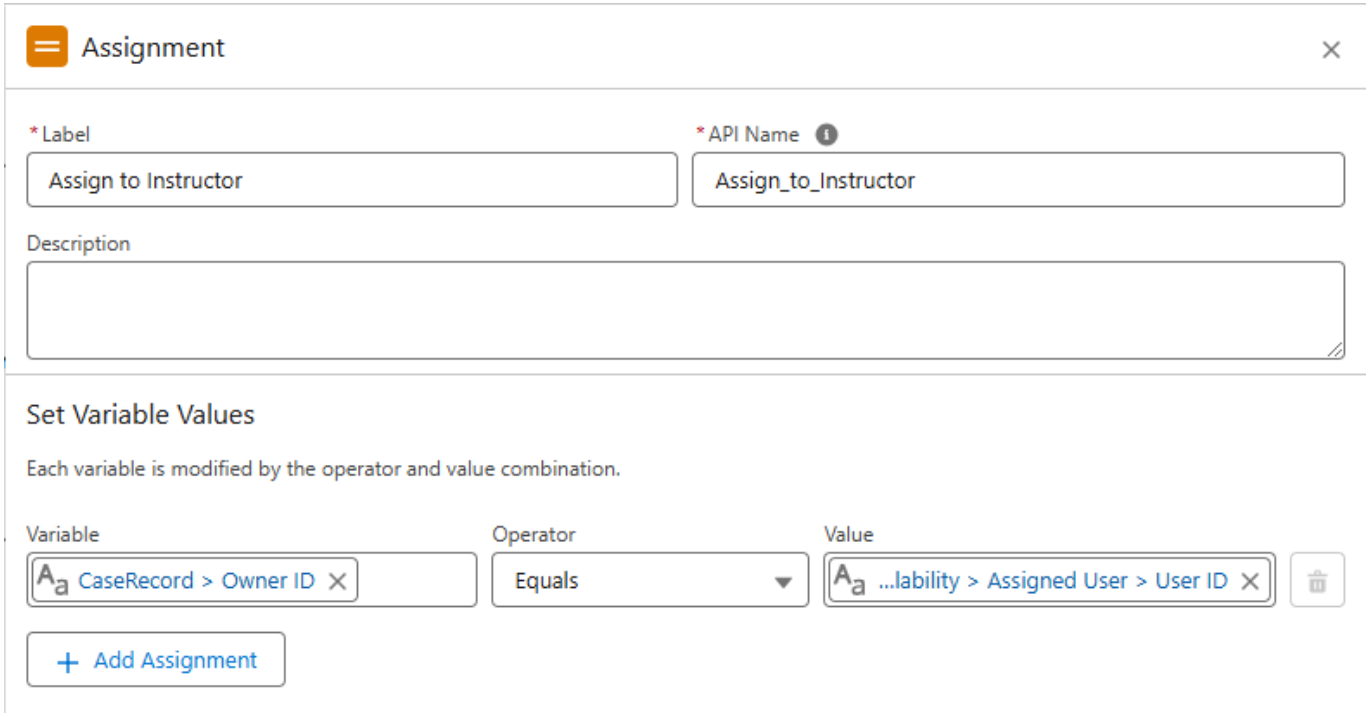

+ Add Field
Manually assign variables
Store Case ID in Variable
Variable
CaseRecord > Case ID
Check for Matching Records
Disabled


Get Records
* Label
Get Instructor Availability
* API Name
Get_Instructor_Availability
Description
Get Records of This Object
* Object
Instructor
Filter Instructor Records
Condition Requirements
All Conditions Are Met (AND)
Field
Availability__c
Operator
Equals
Value
True
+ Add Condition
Sort Instructor Records
Sort Order
Not Sorted
If you store only the first record, filter by a unique field, such as ID.
How Many Records to Store
Only the first record
All records

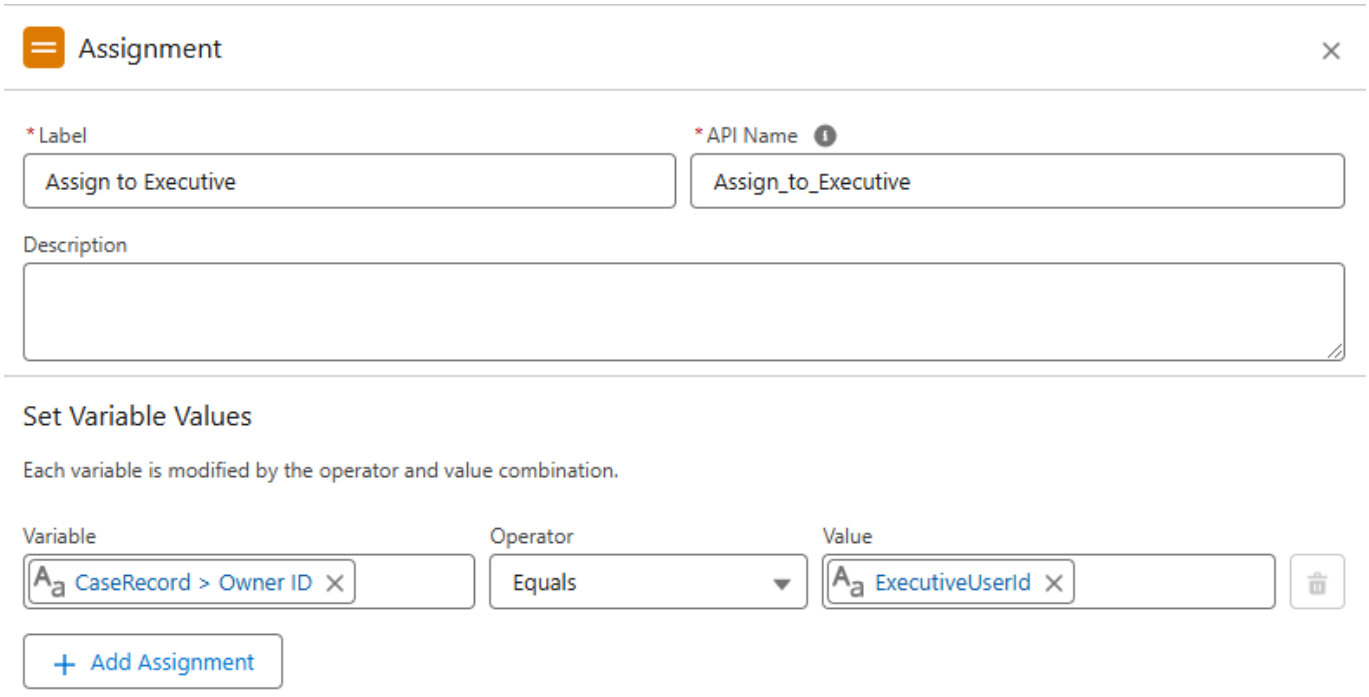

Decision
* Label
Instructor Availability
* API Name
Instructor_Availability
Description
Outcomes
For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.
OUTCOME ORDER
Instructor Available
Instructor Unavailable
Default Outcome
OUTCOME DETAILS
Delete Outcome
* Label
Instructor Available
* Outcome API Name
Instructor_Available
Condition Requirements to Execute Outcome
Any Condition Is Met (OR)
Resource
...uctor Availability > Availability
Operator
Equals
Value
True
Add Condition


Decision
* Label
Instructor Availability
* API Name
Instructor_Availability
Description
Outcomes
For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.
OUTCOME ORDER
Instructor Available
Instructor Unavailable
Default Outcome
OUTCOME DETAILS
Delete Outcome
* Label
Instructor Unavailable
* Outcome API Name
Instructor_Unavailable
Condition Requirements to Execute Outcome
Any Condition Is Met (OR)
Resource
...uctor Availability > Availability
Operator
Equals
Value
False
Add Condition

Instructor Available



Instructor Unavailable



Update Records

*Label: Update Case Owner

*API Name: Update_Case_Owner

Description:

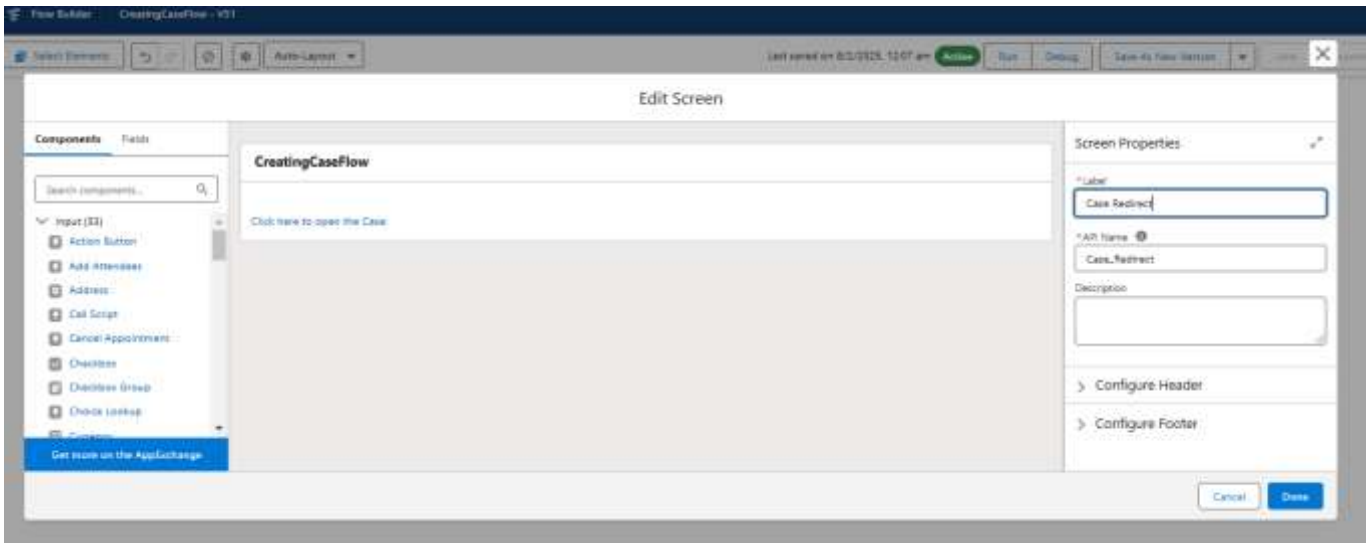
***How to Find Records to Update and Set Their Values**

- (•) Use the IDs and all field values from a record or record collection
- ( ) Specify conditions to identify records, and set fields individually

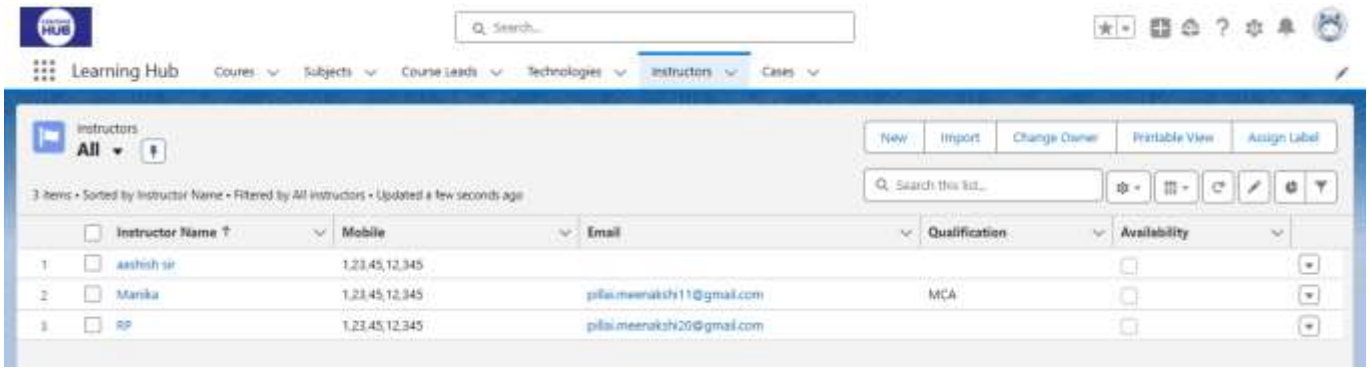
Select Record(s) to Update

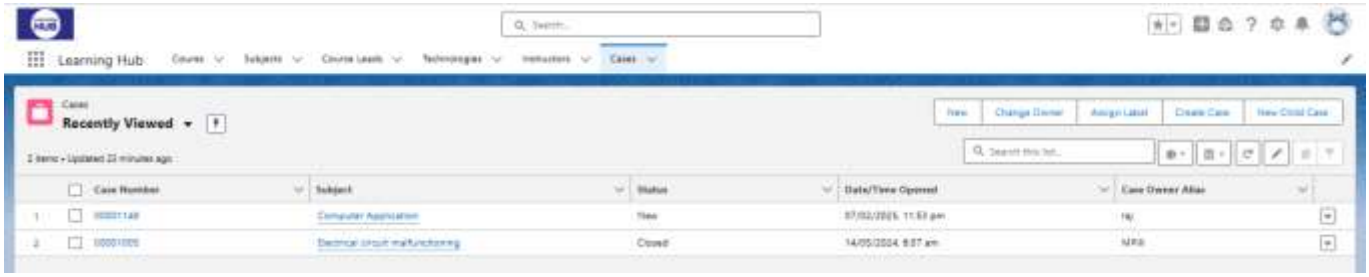
* Record or Record Collection: CaseRecord

Make sure that each record has an ID. Otherwise the flow can't find the records to update, and it fails.

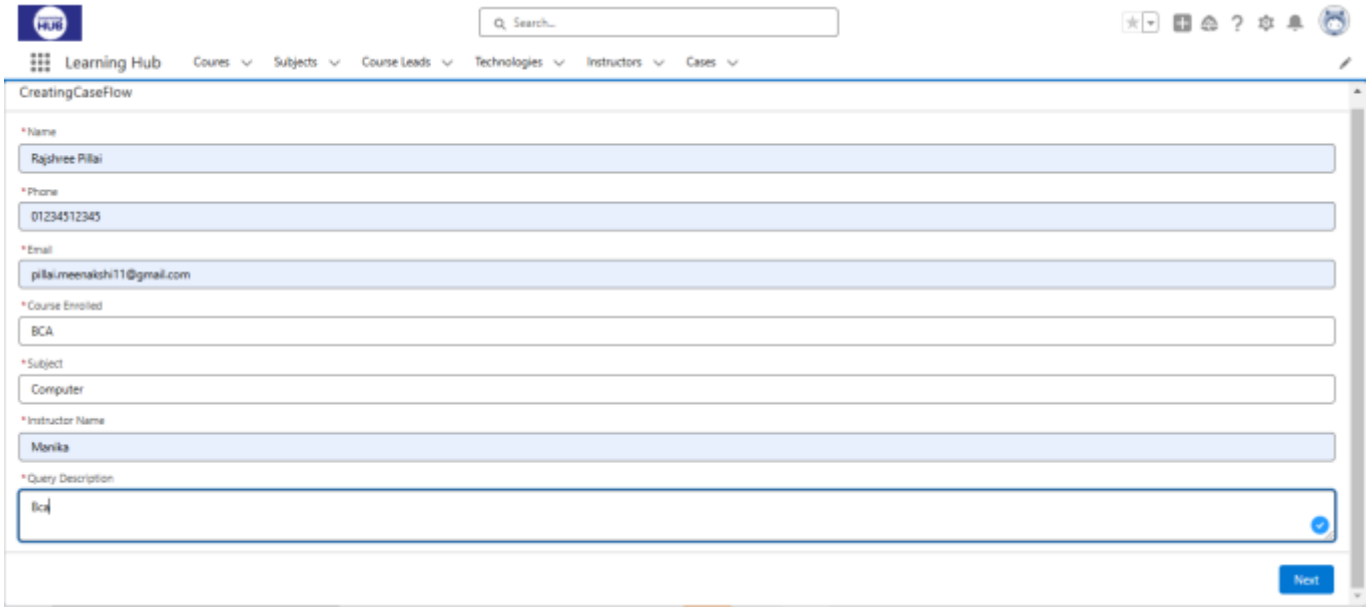


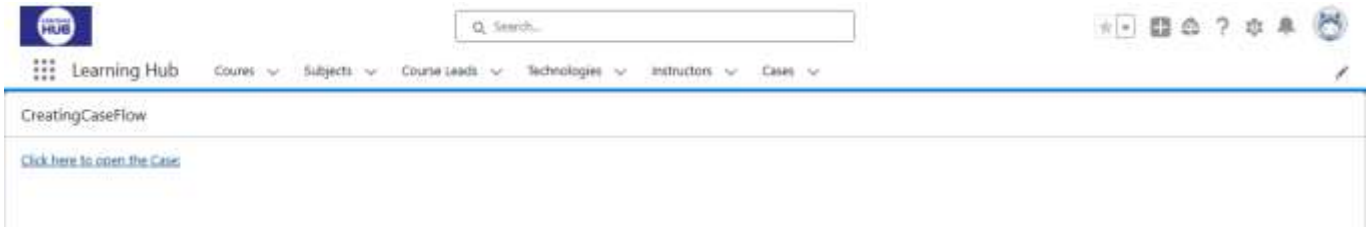
If Instructor is not Available

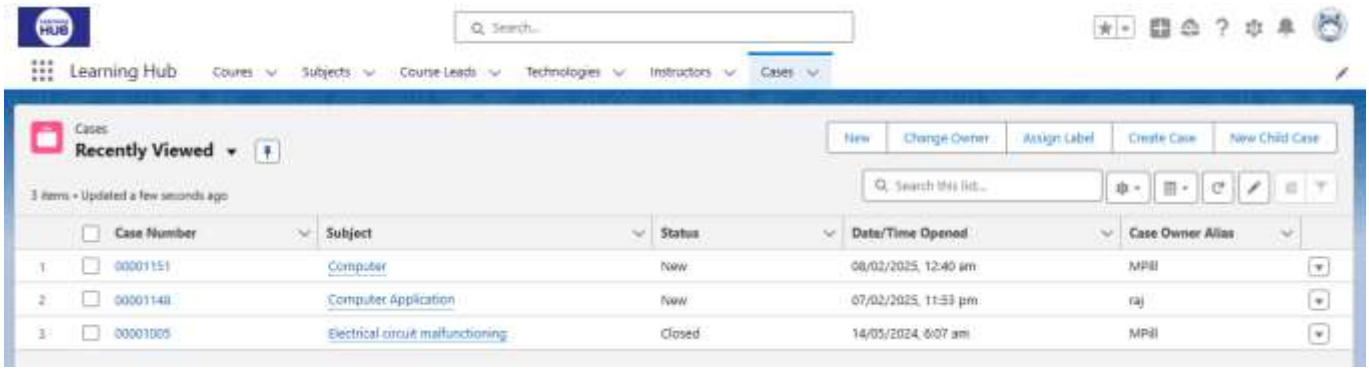




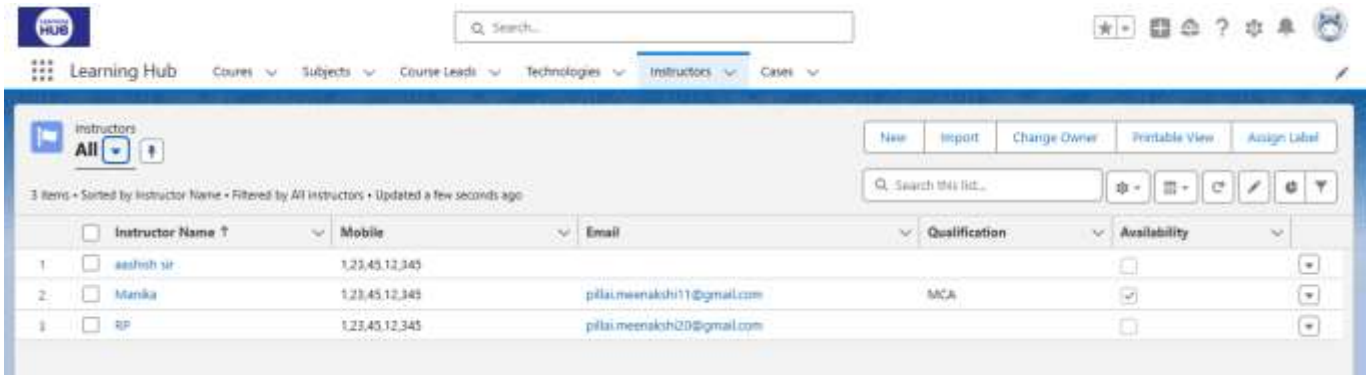
Click on Create Case

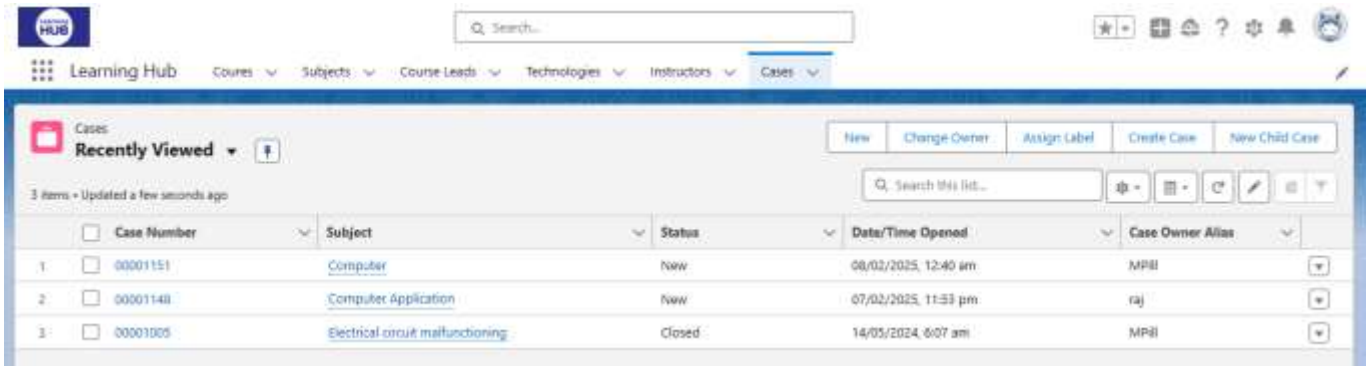




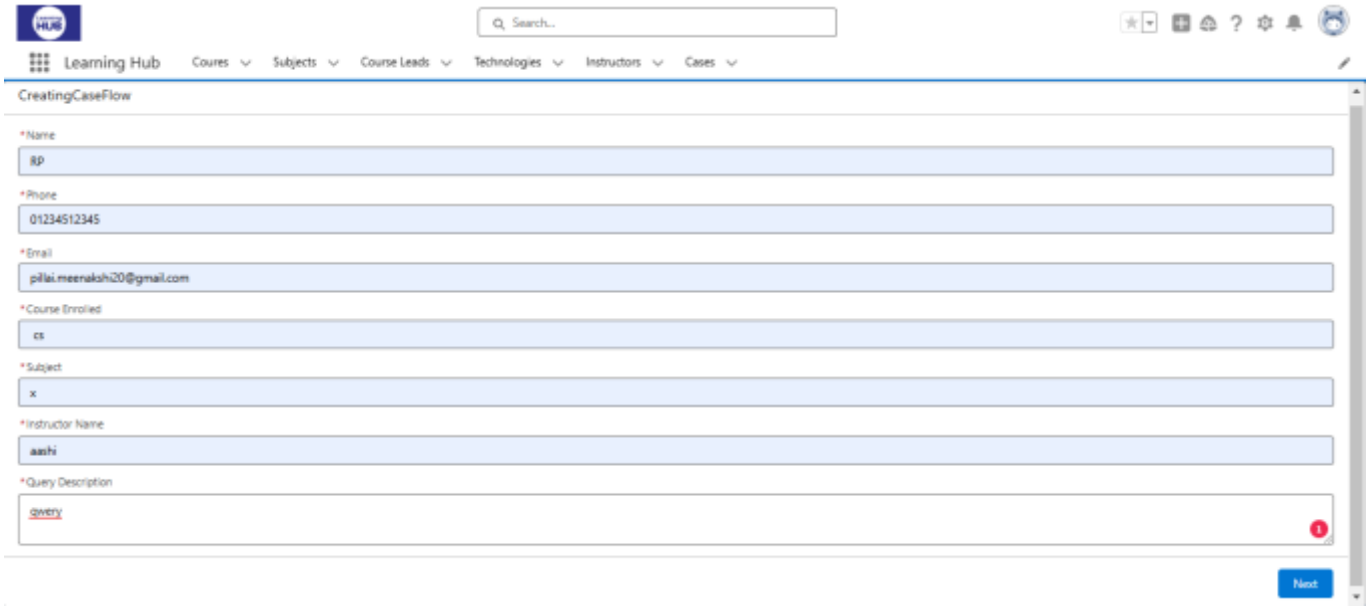


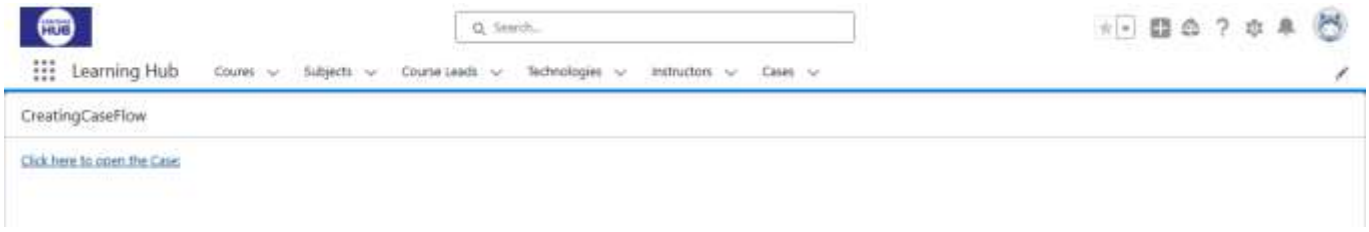
If Instructor is Available

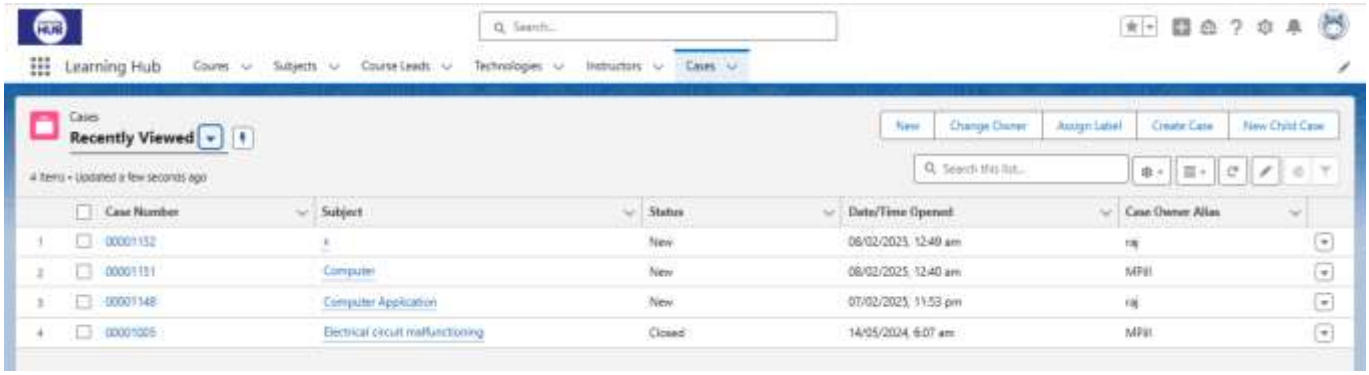




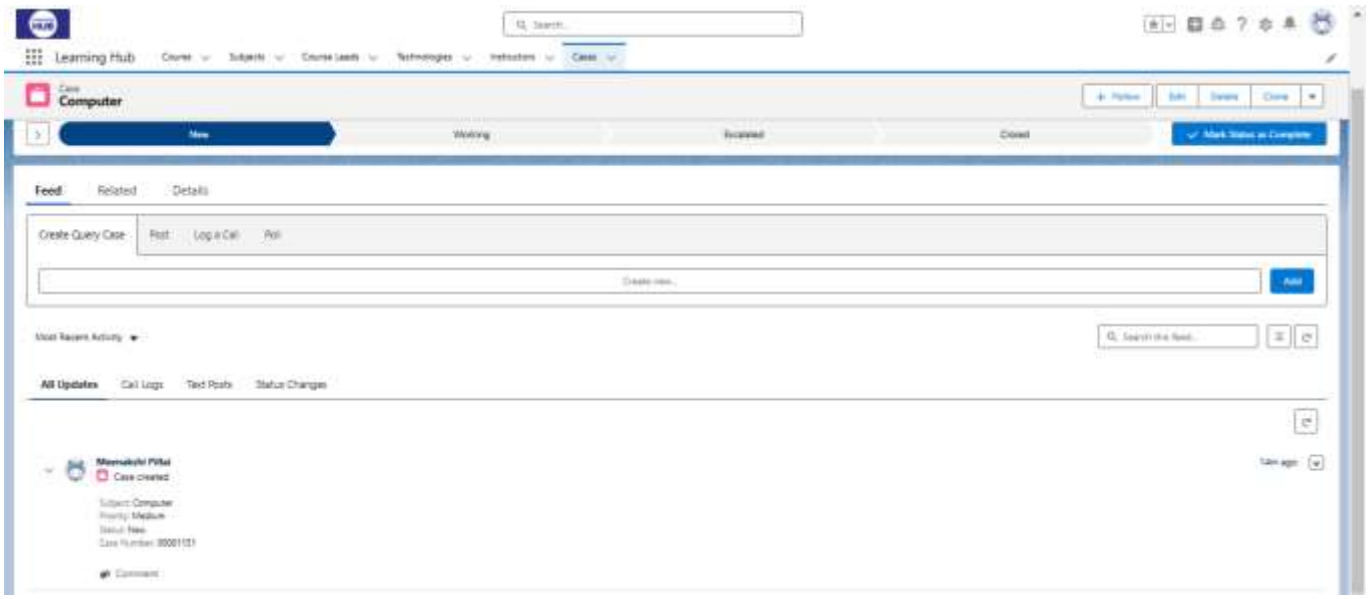
Click on Create Case

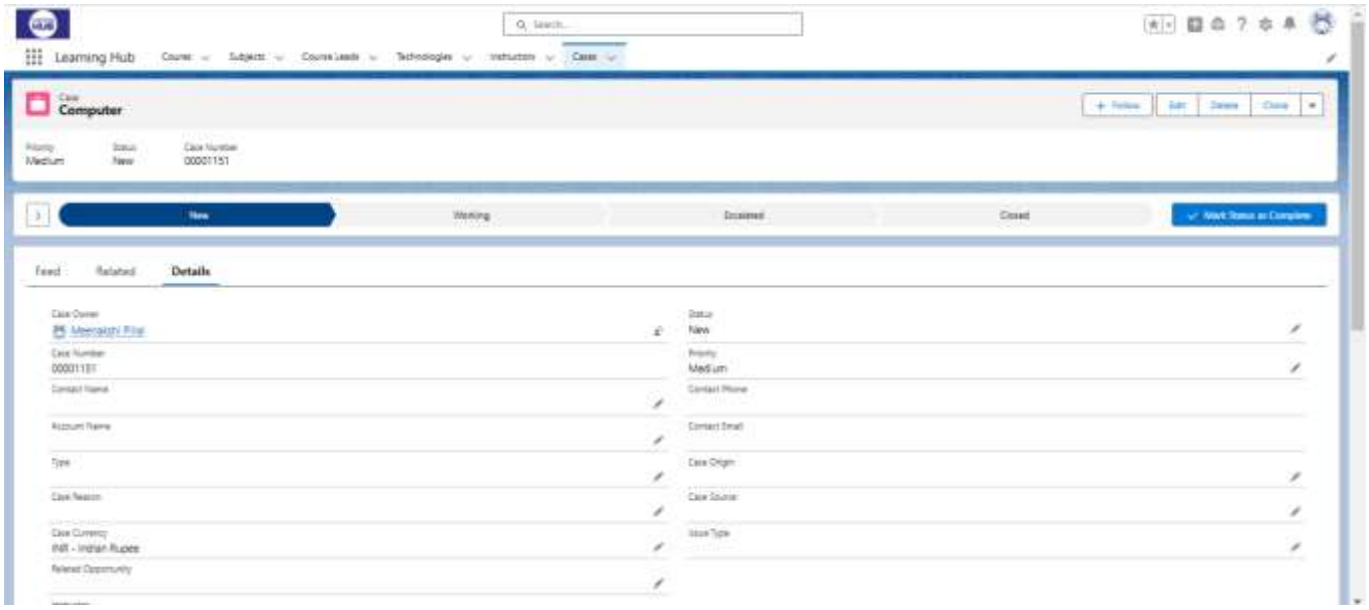


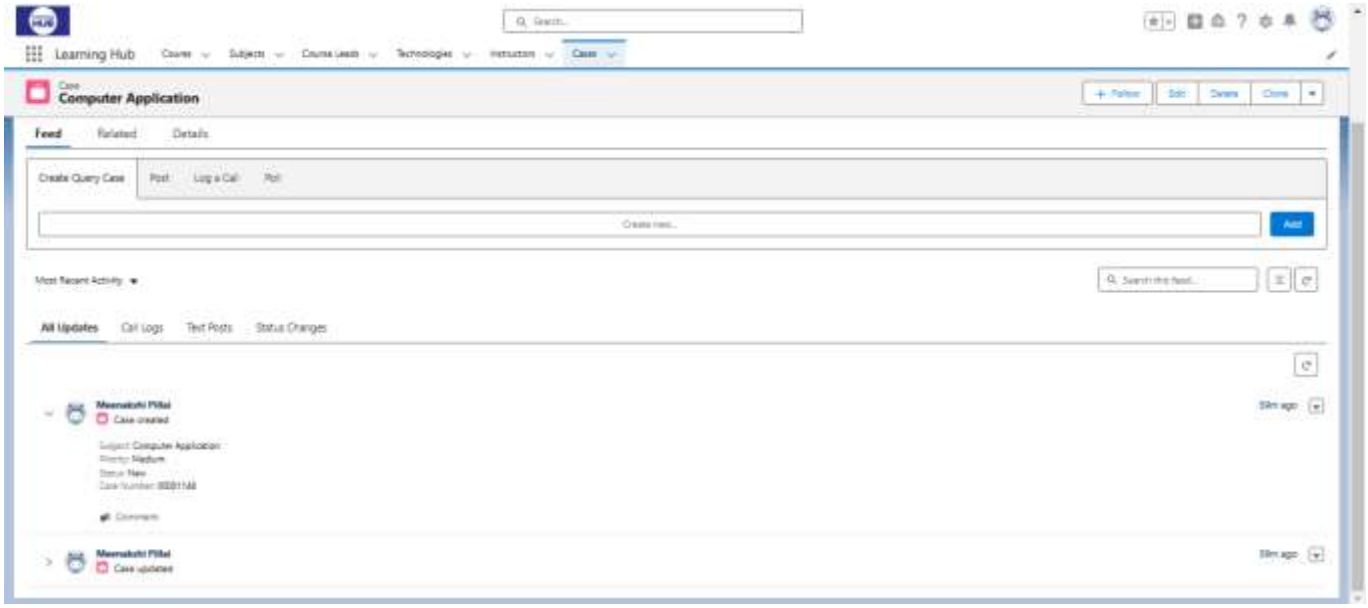
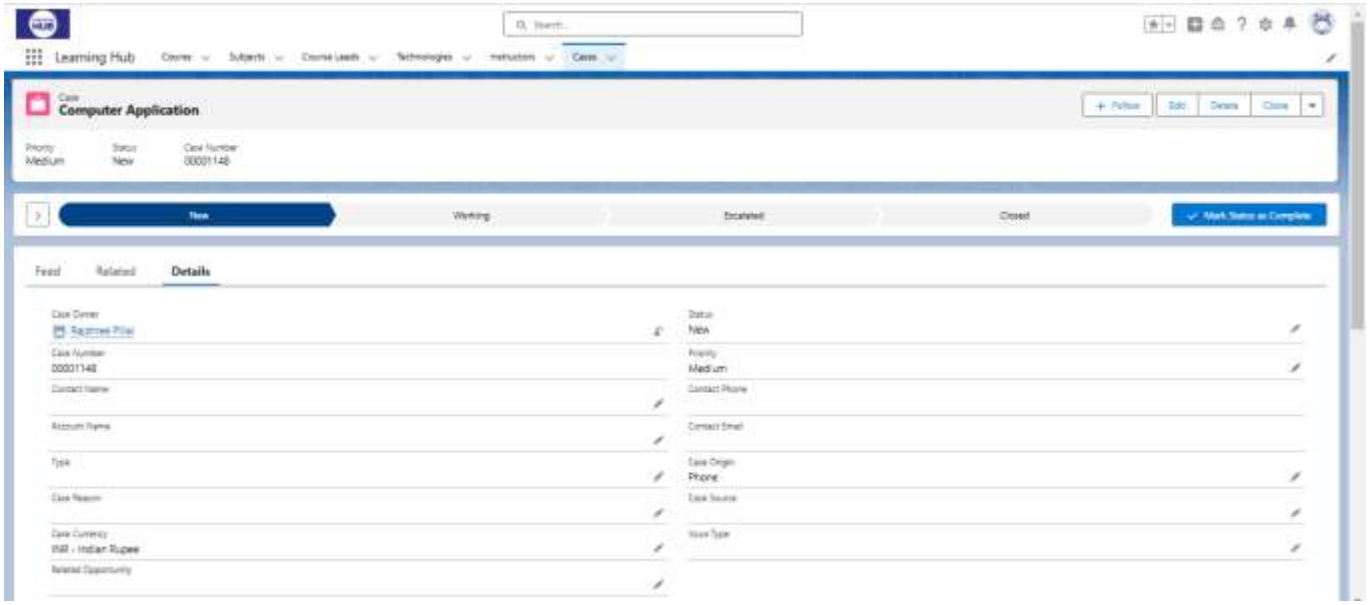




On Clicking where Subject : Computer (When Instructor is not available assign to executive)





On Clicking where Subject : Computer Application

(When Instructor is available assign to Assigned user's of available instructor)