Sanjay Gupta Tech School

Your Success, Our Mission

Salesforce Virtual Bootcamp

Helping Trailblazers Learn Salesforce & Build Career

(January - June, 2023)

Day 1 to 26

Exercise Sheet for Beginners

Salesforce Bootcamp Session Tracker

https://docs.google.com/spreadsheets/d/1a-bxGs9nw37zpc2QyGCuoPMt3obFKMwVHdZSB4rHw1U/edit?usp=sharing

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

Exercise Sheet

Day - 1

1. Create Developer Edition Org **[developer.salesforce.com]**
2. Create Trailhead Account **[trailhead.salesforce.com]**
3. Link both Developer Edition Org and Trailhead Account
4. Create Two Users
    a. One will be already there in the org with which you created Developer Org. This user's profile is System Administrator
    b. Create one more User with a different username. Assign License as Salesforce and Profile as Standard User.
5. Enable Login Button

Day - 2

Live Session Link:
https://www.youtube.com/watch?v=NSlspVxU6AM&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=3&t=16s

1. Create Student Custom Object.
    a. Field Student ID [Auto Number]
2. Create Tab for Student Custom Object.
3. Create Fields for Student Object
    a. Name [Text (100)]
    b. Father Name [Text (100)]
    c. Mother Name [Text (100)]
    d. Phone [Phone]

   e. Email [Email]
   f. Address [Text (250)]
   g. Entrance Score [Number (5,2)]
4. Create '**Sanjay Gupta Tech School**' App
5. Add Student Tab to above App.
6. Launch App from App Launcher and Test.
7. Create 5 Records for Student Object.
8. Create Instructor Custom Object.
   a. Field Instructor ID [Auto Number]
9. Create a Tab for Instructor Custom App and Add it to Sanjay Gupta Tech School App.
10. Create Fields for Instructor Object:
    a. Name [Text (100)]
    b. Salary [Number (10,2)]
    c. Year of Experience [Number (4)]
11. Create 5 Records under Instructor Object.

Day - 3

Live Session Link:
https://www.youtube.com/watch?v=CFLL52xwKog&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=4

1. Create all Text, Picklist, Multi-Select Picklist, Checkbox, Number fields on Student and Instructor Object. [Refer Session Tracker sheet's Data Model Tab]

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

Student	Instructor
Student ID	Instructor ID
Name (Text)	Name (Text)
Father Name (Text)	Cloud Expertise (Picklist - Multiselect)
Mother Name (Text)	Role Expertise (Picklist)
Phone (Phone/Number)	Salary (Currency)
Email (Email)	Bonus (Formula)
Age (Number)	Total Salary (Formula)
Address (Text)	Rating (Number)
Entrance Score (Number)	Years of Experience (Number)
Stream (Picklist)	Salesforce Skill Set (Multi picklist)
Salesforce Role (Picklist)	Weekdays (Picklist) thorugh Global Value Set
Salesforce Skill Set (Multi-Picklist)	Lookup to Class
Passout? (Checkbox)	
Career Objective (Text Area)	
Brief Bio (Text Area Long)	
Resume (Text Area Rich)	
Enrolled Full Time (Checkbox)	
Lookup/Master-Detail to Class	
Weekdays (Picklist) through Global Value Set	

2. Add Some fields on ‘All’ List View on Student and Instructor Object.
3. Create a Global Value set named as **Weekdays** (Values: Monday to Sunday) and use that to create a picklist field under Student & Instructor named as Weekdays.

Picklist Values

Role	Cloud Expertise
Admin	Sales
Developer	Service
Quality Analyst	Marketing
Business Analyst	Commerce
Architect	NPSP
Project Manager	Health
	CPQ
Skill Set	Education
Admin Concepts	NetZero
Data Security	Financial Services
Report	Field Service
Dashboard	Vlocity/Industries
Flow	
Apex	Stream
Trigger	Arts
Test Class	Commerce
Async Apex	Science
Integration	Management
Visualforce	
Aura	
LWC	
JIRA	
Smartsheets	
Deployment	
Lucid Chart	
G Suite	

4. Create field dependency between:
    a. Salesforce Role & Salesforce Skill Set Fields
    b. Enrolled Full Time & Weekdays
5. Create a Console Navigation App named **‘SGTS Console’**.

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

Day - 4

Live Session Link:
https://www.youtube.com/watch?v=zlUzKxZk59c&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=5

1. Create following Formula Fields:
   a. Create Bonus (Formula field) on Instructor Object, if Salary > 10k then 20% else 10%
   b. Create Total Salary (Formula Field) on Instructor Object

2. Create following Validation Rules:
   a. Student's age should be > 0.
   b. Instructor rating should be between 1 to 5.
   c. Student's entrance score should not be blank.

3. **Formula Guide:**
   https://blog.bessereau.eu/assets/pdfs/salesforce_useful_formula_fields.pdf

4. **Validation Rule Guide:**
   https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/salesforce_useful_validation_formulas.pdf

Student Record Type	Fresher	Experienced
Student Information	Student ID	Student ID
	Name (Text)	Name (Text)
	Father Name (Text)	Father Name (Text)
	Mother Name (Text)	Mother Name (Text)
Communication Details	Age (Number)	Age (Number)
	Phone (Phone/Number)	Phone (Phone/Number)
	Email (Email)	Email (Email)
	Address (Text)	Address (Text)
Educational Details	Entrance Score (Number)	
	Stream (Picklist)	
Salesforce Skills	Salesforce Role (Picklist)	Salesforce Role (Picklist)
	Salesforce Skill Set (Multi-Picklist)	Salesforce Skill Set (Multi-Picklist)
Professional Information	Passout? (Checkbox)	Passout? (Checkbox)
	Career Objective (Text Area)	Career Objective (Text Area)
	Brief Bio (Text Area Long)	Brief Bio (Text Area Long)
	Resume (Text Area Rich)	Resume (Text Area Rich)
	Enrolled Full Time (Checkbox)	Enrolled Full Time (Checkbox)
	Weekdays (Picklist) through Global Value Set	Weekdays (Picklist) through Global Value Set

5. Create Two Page Layouts on Student Object [Section details are available above]:
    a. Fresher Layout
    b. Employed Layout
6. Create Two Record Types on Student Object:
    a. Fresher
    b. Employed
7. Control Role Picklists through Record Type.

Fresher / **Experienced**

Role	Role
Admin	Admin
Developer	Developer
Quality Analyst	Quality Analyst
	Business Analyst
	Architect
	Project Manager

8. Create Compact Layout for Student Object. Add a few fields in the layout.

Day - 5

Live Session Link:
https://www.youtube.com/watch?v=Vx-xbu0cNro&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=6

1. Create an Object named Class.
2. Create Course Duration (Text) and Fees (Currency) fields on Class Object.
3. Create a lookup field on Student Object related to Class.
4. Create a lookup field on Instructor Object related to Class.
5. Convert lookup field created on student object into master-detail field.
6. Create Following Rollup Summary Fields on Class Object:
   a. Total Students
   b. Highest Entrance Score
   c. Lowest Entrance Score
   d. Total Entrance Score
7. Create Average Entrance Score (Formula) field on Class Object.
8. Convert lookup field created on Instructor Object into master-detail field.
9. Create Total Instructor Rollup Summary Field on Class Object.
10. Convert master-detail field available on Instructor object back to lookup relationship field.
11. Create a Junction Object named as StdClass. Create two master-detail relationships on this object. One related to Student Object and Another related to Class.

12. Apply Lookup Filter on Student Lookup Field.

Day - 6

Live Session Link:
https://www.youtube.com/watch?v=6lM9rLJ8_xE&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=7

1. Create Following List Views on Student Object. Select a few fields as per your choice to display in the list view.
    a. All Freshers
    b. All Experienced
2. Create a list view on an Instructor object named 'Experienced Instructor'. This list view should contain only those instructor records whose experience is >=5 years. Select a few fields as per your choice to display in the list view.
3. Create Home Page and Place it on 'SGTS' and 'SGTS Console' Apps. Place the following components on the page.
    a. Assistant
    b. Key Deals
    c. Today's Event
    d. Today's Task
    e. Chatter Feed
4. Create an App Page and Place it on SGTS and SGTS Console Apps. Place the following components on the page.
    a. Assistant
    b. Key Deals
    c. Today's Event
    d. Today's Task
    e. Chatter Feed

5. Create a Record Page for Student Object and place Activity and Chatter Components on it and activate for SGTS app only.

Note: Further we will be placing reports and dashboards on these lightning pages.

Day - 7

Live Session Link:
https://www.youtube.com/watch?v=to4eXNjbluA&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=8

1. Create duplicate and matching rule on Student Object. Prevent creation of duplicate records based on email id.
2. Place Activity component on Student, Instructor and Class Objects.
3. Apply Feed Tracking on a few fields for Student, Instructor, Class and Account Objects.
4. Enable field history tracking for a few fields on Student, Instructor, Class and Account Objects.
5. Explore View Setup Audit Trails.

Day - 8

Live Session Link:
https://www.youtube.com/watch?v=mzqgxNHEdxA&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=9

1. Create a **Tabular Report** on Account Report Type. Include Account Id, Name, Annual Revenue, Type, Industry, Active, Rating, etc. field in the report.
    a. Apply a standard filter to show all time records.

   b. Apply a custom filter to show only those accounts where Active is Yes.
   c. Save Report in 'Tabular Report' Folder.
2. Create a **Tabular Report** on Case Report and include Case Number, Contact Name, Account Name, Status, Priority, Case Origin, etc. fields in the Report.
   a. Apply a standard filter to show all time records.
   b. Apply a custom filter to show only those cases where status is new.
   c. Save report in 'Tabular Report' Folder.
3. Create a **Summary Report** on Opportunity and Summarize it based on Account Name. Include a few fields based on your choice in the report.
   a. Apply a standard filter to show all time records.
   b. Apply a custom filter to show only those opportunities where Account Name is not null and Stage is not closed lost.
   c. Create a report chart as well. Select any chart type.
   d. Store the report in 'Summary Report' Folder.
4. Create a **Summary Report** on Contact and Summarize it based on Account Name. Include a few fields based on your choice in the report.
   a. Apply a standard filter to show all time records.
   b. Apply a custom filter to show only those contacts where Account Name is not null.
   c. Create a report chart as well. Select any report type.
   d. Store the report in 'Summary Report' Folder.
5. Create a **Matrix Report** on Opportunity. Group rows on Stage and columns on Lead Source.
   a. Apply a standard filter to show all time records.
   b. Create a report chart as well. Select any type of chart.
   c. Store the report in 'Matrix Report' Folder.

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

Day - 9

Live Session Link:
https://www.youtube.com/watch?v=L4ShnD0mqsg&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=10&t=1351s

1. Create **Custom Report Type** for following objects:
   a. Student
   b. Instructor
   c. Primary Class and Secondary Student and Third StdClass
   d. Primary Class, Secondary Instructor
2. Create a **Tabular report** on Student Object. Select a few fields to show. Store the report in ‘Tabular Report’ Folder.
3. Create **Summary report** on Student object and summarize it based on Salesforce Role Field. Select a few fields to show. Store the report in ‘Summary Report’ Folder. Create a report chart as well.
4. Create a **Tabular report** on Instructor Object. Select a few fields to show. Store the report in ‘Tabular Report’ Folder.
5. Create **Matrix report** on Instructor object and Group rows based on Role Expertise field and Group columns based on Years of Experience Field. Select a few fields to show. Store the report in ‘Matrix Report’ Folder. Create a report chart as well.
6. Create a **Joined report** on Account and Opportunity together. Group records based on Account Name.
7. Create following **bucket fields** on Opportunity report. Use these bucket fields to summarize reports.
   a. Bucket for Stage [Picklist]
   b. Bucket for Amount [Number/Currency]

8. Create a **Scoping rule** on Account and use it in Account Tabular Report. Use below Criteria
    a. User is Active
    b. Account Active Field = Yes
9. Create a report on Account Object. Now Create a **Row Level Formula**. Name it as 'Doubled AR'.
    a. Formula should be Annual Revenue * 2
    b. Also calculate Sum, Max, Min, Avg etc. through that formula

Day - 10

Live Session Link:
https://www.youtube.com/watch?v=NJUwLuv85MI&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=11

1. Create Custom Report Type to create a report on duplicate records. After creation of the report type, create a report as well.
2. Export any report to the local system.
3. Create a Dashboard and place reports created on Day 8 and 9 onto it. Store the dashboard in a folder.
4. Place report and dashboard on Lightning Home, Record and App Pages.
5. Share report and dashboard with other users. Also test sharing by logging in with another user in an incognito window.

Day - 11

Live Session Link:
https://www.youtube.com/watch?v=YbOKv1dP3Ko&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=12&t=2656s

1. Verify whether your org is having two users created with ‘Salesforce License.
    a. Admin (First) User Profile - System Administrator
    b. Test (Second) User Profile - Standard User
2. Clone ‘Standard User’ Profile and create a new **Profile** named ‘Demo User’
3. Assign ‘Demo User’ profile to Test User.
4. Change **Object Level Security** on ‘Demo User’ Profile.
    a. On Account object restrict edit and delete access
    b. Now login with Test User in Incognito Window and verify the changes made on Profile.
5. Change **Field Level Security** on ‘Demo User’ Profile.
    a. On Account object restrict view and edit access to Industry field.
    b. Now login with Test User in Incognito Window and verify the changes made on Profile.
6. Create a new **Permission Set** named ‘Demo One PS’. Assign this PS to Test User.
7. Give below permissions to ‘Demo One PS’ Permission set and verify.
    a. On Account object open up edit access to object.
    b. On Account object open up view and edit access to Industry field.
    c. Now login with Test User in Incognito Window and verify the changes made on Permission Set.
8. Create one more new Permission Set named ‘Demo Two PS’. Assign this PS to Test User.
9. Give below permissions to ‘Demo Two PS’ Permission set and verify.
    a. On Account object open up delete access to object.
    b. Now login with Test User in Incognito Window and verify the changes made on Permission Set.

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

Day - 12

Live Session Link:
https://www.youtube.com/watch?v=NafP8MUqQe0&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=13&t=19s

1. Assign ‘Demo One PS’ and ‘Demo Two PS’ to a **Permission Set Group**. Now remove assigned permission sets from Test user and Assign Permission Set Group and test.
2. Try muting delete object permission for Account object from Permission Set Group.
3. Login with **Admin User** and **Test User** in two browser windows.
4. Check whether **‘Test User’** is able to view records owned by **‘Test User’** as well as Admin on Account Object. If there are no records created by **‘Test User’** then create a couple of records.
5. Apply **OWD** as Private on Account Object.
6. Now check again that **‘Test User’** will be able to view only those records which are owned by **‘Test User’**.
7. Now create a **Role Hierarchy** where **‘Test User’** will be above in hierarchy for **Admin User**. Now **‘Test User’** will be able to see Admin owned account records again.
8. Now remove role hierarchy so that we can test records sharing through sharing rules. Before applying sharing rules check again **Test User** won’t be able to see admin owned account records.
9. Create **Owner based sharing rule** on Account Object. Now **‘Test User’** will be able to see Admin owned account records again.
10. Delete Owner based sharing rule and create **Criteria based sharing rule**. Now check that **‘Test User’** will be able to view records based on criteria based sharing rules.

11. Apply **Manual Sharing** on any particular Account Record owned by **Admin User**. Now Test whether **'Test User'** is able to access that manually shared record or not.

Day - 13

Live Session Link:
https://www.youtube.com/watch?v=uzEFIo4mkZY&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=14

Data Import Wizard

1. Create an Excel sheet having Account Information. Sheet should contain Account Name, AnnualRevenue, Type, Rating, Employees and Description.
2. **Insert** excel sheet in Salesforce Org. Verify the data in the org.
3. Put Id of inserted records in excel sheet, update information of few records and perform **Update** operation. Verify the data in the org.
4. Perform **Upsert** operation to insert new records and update existing records. Verify the data in the org.

Data Loader

5. Use the excel sheet created in step 1 and make sure Ids are not there in the sheet. Now Perform **Insert** Operation. Verify the data in the org.
6. Perform **Update** operation by putting Ids into the sheet. Update few records data as well. After update operation verify the data in org.
7. Perform **Upsert** operation to insert new records and update existing records. Verify the data in the org.
8. **Export** Account records including Id, Name, Rating where Active__c = 'Yes'. Verify exported data in the computer.

9. **Delete** exported data from Salesforce Org. Verify that deleted data is in the Recycle Bin.
10. Perform **Export All** Operation on Account Object to fetch records along with delete records.

Day - 14

Live Session Link:
https://www.youtube.com/watch?v=nItiZ6zjSDo&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=15&t=901s

1. **Create a User** named 'John Doe' with Salesforce Platform License, Role will be VP, North American Sales and Profile will be Standard Platform User.
2. **Create a Role** named as "Manager" under VP, North American Sales.
3. **Create a User** named 'Nick Doe' with Salesforce Platform License, Role will be Manager and Profile will be Standard Platform User.
4. Edit logged in User record (System Admin) and select Manager (Field) as 'Nick Doe'.
5. Setup > Session Setting > Uncheck "Force relogin after Login-As-User"
6. **Create New Custom Fields** on opportunity object:
    a. Discount Percentage
        i. Data Type : Percent(2,2)
    b. Approval Status
        i. Data Type : Picklist
        ii. Picklist values are Pending, Approved, Not Approved.
    c. Both fields will be read only for all profiles except Standard User and System Administrator.

7. **Create a Folder to store Email Templates**
   a. Folder Name : Discount Request Responses
   b. Public Folder access : Read/Write
8. **Create Classic Email Template (Text)**
   a. Folder: Discount Request Responses
   b. Name: Discount Approved
   c. Description: Used to alert requestors that a discount has been approved
   d. Subject: Your Discount Request Was Approved
   e. Body:

      Dear {!Opportunity.OwnerFullName},
      Good news! Your recent discount request has been approved. Please log in to your org for details.
      Best,
      John Doe
      VP, North American Sales
9. **Create one more Classic Email Template (Text)**
   a. Folder: Discount Request Responses
   b. Name: Discount Rejected
   c. Description: Used to alert requestors that a discount has been rejected
   d. Subject: Your Discount Request Was Rejected
   e. Body:

      Dear {!Opportunity.OwnerFullName},
      Unfortunately, your recent discount request has been rejected. Please log in to your org for details.
      Best,
      John Doe
      VP, North American Sales

10. **Create Approval Process** on Opportunity Object with below criterias.
    - If a discount is requested for 20% or less, it is automatically approved.
    - If a discount is requested for more than 20%, it must be approved by a Manager.
    - If a discount is requested for more than 40%, it must also be approved by VP, North American Sales

Day - 15

Live Session Link:
https://www.youtube.com/watch?v=eT1JtwIF-yE&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=16&t=254s

1. Configure **Dynamic Forms** for both Standard and Custom Objects.
2. Create an **Object Specific Action** on Class object so that a Student record can be created while we are on Class Object's record through Quick Action only.
3. Create a **Global Action** to create a Student Record.
4. Create a **Cross Object Formula** field on Student object to have Duration (Field) value of Class record on Student record.
5. Show Classmates of a Student on the Student Record Page through **Related List Single**.
6. Setup **Salesforce Inspector Chrome Extension** in your system. Explore the extension.
7. Explore **AppExchange**. [https://appexchange.salesforce.com/]

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

Day - 16 to 21

Salesforce Admin Project Link:
https://docs.google.com/document/d/1Tr3oKQOchob2f3e1OpfZy9SJ7WcWUtC-RlG0qnsDp_0/edit?usp=sharing

Admin Project Live Session Playlist Link:
https://www.youtube.com/watch?v=jxBnAUY6bv0&list=PL-gW8Fj5TGroRtc8XV6DfBdmt0UNfCC8r

Note: Same Project will be enhanced later to do Development Tasks.

Day - 22

Live Session Link:
https://www.youtube.com/watch?v=8V3Lq78A5Bw&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=23

Please review the comparison between different automation tools.

	Process Builder	Flow Builder	Workflow	Approvals
Complexity	Multiple if/then Statements	Complex	A single if/then Statement	A single if/then Statement
Visual Designer	Yes	Yes	No	No
Supports Time-based Actions	Yes	Yes	Yes	No
Supports User Interaction	No	Yes	No	No

	Process Builder	Flow Builder	Workflow	Approvals
Starts when	1. Record is changed 2. Invoked by another process 3. Platform event message is received	1. User click button or link 2. User accesses Lightning Page, Experience Site Page, VF Page or Custom Tab 3. User Accesses item in a utility bar 4. Process starts 5. Apex is called 6. Record is Created, Updated or Deleted	Record is changed	1. User clicks button or link 2. Process or flow starts that includes a Submit for Approval action 3. Apex is called

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

Sanjay Gupta Tech School

	Process Builder	Flow Builder	Workflow	Approvals
Call Apex Code	Yes	Yes	No	No
Create Records	Yes	Yes	Task only	Task only
Invoke Sub Processes	Yes	Yes	No	No
Delete Records	No	Yes	No	No

Sanjay Gupta Tech School

	Process Builder	Flow Builder	Workflow	Approvals
Launch a flow	Yes	Yes	No	No
Post to Chatter	Yes	Yes	No	No
Send email	Yes (Email alerts only)	Yes	Yes (Email alerts only)	Yes (Email alerts only)
Send outbound messages without code	No	Yes	Yes	Yes

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

Sanjay Gupta Tech School

	Process Builder	Flow Builder	Workflow	Approvals
Submit for Approvals	Yes	Yes	No	No
Update fields	The record or its parent or child	Any record	The record or its parent	The record or its parent
Custom Notification	Yes	Yes	No	No
Quick Action	Yes	Yes	No	No
Quip	Yes	Yes	No	No

Day - 23

Live Session Link:
https://www.youtube.com/watch?v=DeRo8cJSAto&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=24

Demoed in Session

1. Create a **Screen Flow** to create an Opportunity Record related to Account Record. Launch the Flow through Quick Action. Quick Action should be available on the Account Record Page.
2. Place the flow created in Step 1 on the Account Record Page to create a related Opportunity through Screen Flow.

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

For Self Practice

3. Create a Screen Flow to create a Contact record related to an Account and Debug it.
   [Reference: https://www.youtube.com/watch?v=ZL6jvAtLoWU]
4. Create a Screen Flow to create a Case record related to an Account. Launch the flow through Quick Action. Quick Action should be available on the Account Record Page.
   [Reference: https://www.youtube.com/watch?v=mrO7WPTr_KE]

5. What happens when flow fails:
   [Reference: https://www.youtube.com/watch?v=t79OiVNQAxw]

6. Pause and Failed Flow Interview:
   [Reference:https://www.youtube.com/watch?v=N1spwpq0QpE]

7. Place the screen flow on Home Page or App Page:
   [Reference:https://www.youtube.com/watch?v=0hf4DW1gt24]

Day - 24

Live Session Link:

https://www.youtube.com/watch?v=cxJGEN8auyk&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=25

Demoed in Session

1. Create a Contact record by placing Screen Flow on the Homepage of 'Sanjay Gupta Tech School' App.
   a. Place a link on a screen so that we can redirect to newly created

record. https://www.youtube.com/watch?v=KHwYcyGJQck

b. Flow should have an option to attach file. Maybe through a checkbox.
c. If a user attaches a file then it should be related to the newly created contact record.
d. Flow should have an option to link contact record with an Account. [Hint: create lookup field on flow screen]
e. Once a contact is created then send an email to email id populated on contact record.
f. Try to place Screen Flow on App Page and Test.

For Self Practice

2. Send Custom Notification upon Opportunity Creation related to an account.
   [Reference:https://www.youtube.com/watch?v=XeffdWxF2O0]

3. Send Email through Email Action available in Flow.
   [Reference:https://www.youtube.com/watch?v=9tHkRcb9ggU]

4. Send Email through Email Alert and Email Template through Flow.
   [Reference:https://www.youtube.com/watch?v=9joLHPUq8eg]

5. Post to Chatter through Flow.
   [Reference:https://www.youtube.com/watch?v=YZWHIhCPKbY]

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

Day - 25

Live Session Link:
https://www.youtube.com/watch?v=XoGXAaZy4BI&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=26

Demoed in Session

1. Create a Contact OR an Opportunity OR a Case related to Account based on User's Choice through **One Screen Flow**.
2. Create a Contact OR an Opportunity OR a Case related to Account based on User's Choice through **Sub Flow**.
3. Modify any one of above flow to create 'N' Contacts OR Opportunities OR Cases should be created related to Account based on User's Choice. **[Hint: Use Loop Element]**

For Self Practice

4. Copy data from Source record into Destination record through **Screen Flow.**
   [Reference: https://www.youtube.com/watch?v=OqCPQB2Y-e4]

5. Place single Screen flow on Account as well as Case Record.
   a. Create a Text Field on Account Object called "Alert Note" [through Object Manager not in flow]. Now Create a Screen Flow that displays the Account Alert Note. Add the Screen Flow to the Account Lightning Page at the top of the right column. Add a Visibility Filter that only shows the element if a value is present in the "Alert Note" for the Account.
   b. Add the SAME Screen Flow to the Case Lightning Page at the top of the right column. Add a Visibility Filter that only shows the

flow if a value is present on the "Alert Note" for the related Account.

[Reference: https://www.youtube.com/watch?v=vaHG8pWzsuw]

6. Remove Duplicates from Collection
    a. Deduplicate a Collection Variable
    Reference:
    https://www.youtube.com/watch?v=KccQ1AN4wgo
    b. Deduplicate Two Collections and Merge
    Reference:
    https://www.youtube.com/watch?v=clcTQgHOU84

7. Take **Customer Name** (Text), **Feedback Date** (Date) and **Feedback** (Picklist) as input from User. Feedback should be a picklist containing 'Happy', 'Not Happy' and 'May be' as values. If the user selects Happy then create an opportunity, if Not Happy then create a Case, if May be is entered then display a message "We will do our best to improve the services". At last display a message saying "Thanks for providing your valuable feedback" no matter whatever feedback the user provides.
    a. Place the flow on the Home Page.
    b. Place the same flow on the Account Record Page so that new opportunity or case can be linked with the account from which feedback is raised.

Day - 26

Live Session Link: A Talk w/ Freshers on Salesforce Cert Prep
https://www.youtube.com/watch?v=Tjr7zNfiS8Q&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=27&t=604s

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

Day - 27

Live Session Link:
https://www.youtube.com/watch?v=b_v4icVnJBI&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=28

Demoed in Session

1. Record is Created.
    a. Upon creation of an account, a related Opportunity should be created automatically. [No Criteria]
        Opp name = Account Name
        Close Date = Today
        Stage = Prospecting
    b. Now add a criteria if Active = Yes on account then only new Opportunity should be created.
2. When a contact is created then update the “Total Contact” field on account using Record Triggered Flow.

For Self Practice

3. When a Opportunity is created then update the “Total Opportunities” field on account using Record Triggered Flow.
4. When a Case is created then update the “Total Cases” field on account using Record Triggered Flow.

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

Day - 28

Live Session Link:
https://www.youtube.com/watch?v=y0OvM7rmZ9I&list=PL-gW8Fj5TGrqr9oCcfX1MWcoh2oluUHI9&index=29

Demoed in Session

1. When the account phone is updated then update related contact's phone as well through record triggered flow.
    a. Without using Loop Element
    b. Using Loop Element
2. When an Opportunity is set as Closed Won/Lost and Account is populated then post below message as chatter on the Opportunity: **[using chatter post action]**

    @[Account Owner] Opportunity is Closed Won/Lost.
    Closed Date: Show Close Date of Opp
    Amount: Show Amount of Opp

For Self Practice

3. When the Account's billing address is updated then update Contact's mailing address. **[With and Without Loop]**
   Reference: **https://www.youtube.com/watch?v=bbB4AgO9hDM**
4. When an Opportunity is set as Closed Won/Lost and Account is populated then post below message as chatter on the Opportunity: **[using feeditem object]**

    @[Account Owner] Opportunity is Closed Won/Lost.
    Closed Date: Show Close Date of Opp
    Amount: Show Amount of Opp

   Reference: **https://www.youtube.com/watch?v=pXU7Rm4D_44**

Sanjay Gupta Tech School

Your Success, Our Mission

To Show Support: Help to reach 100K+ Subscribers on Youtube

5. When a Case is escalated, send custom notification to a public group. [Note: Create your own notification header and body]
   Reference: https://www.youtube.com/watch?v=LIF_TOhBvwo

6. Assign a Permission Set automatically upon User Creation through Flow.
   Reference: https://www.youtube.com/watch?v=3bP4ZG2OK6E

7. Add User Automatically in Public Group upon User Creation
   Reference: https://www.youtube.com/watch?v=c_a22Y2zwOI