

SFC-MODULE-10-ASSIGNMENT-1

Problem Statement:

The management requires you to add more functionalities to the wallet object we created in the last assignment (refer assignment 9 for objects). Now the management wants you to add more logic to the module:

- *Introduce a field wallet balance which is a formula field updated as wallet balance – bill amount.*

The screenshot shows the Salesforce Setup page for the 'Wallet' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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, and Sharing Rules. The main content area is titled 'Edit Wallet Custom Field' and 'Wallet Balance'. It includes a 'Custom Field Definition Edit' section with buttons for 'Save', 'Quick Save', and 'Cancel'. Below this is the 'Field Information' section, which includes fields for 'Field Label' (Wallet Balance), 'Field Name' (Wallet_Balance), 'Description', and 'Help Text'. There are also dropdowns for 'Data Owner' (User), 'Field Usage' (None), and 'Data Sensitivity Level' (None). A 'Compliance Categorization' section shows a list of categories (HIPAA, GDPR, PCI, COPPA, CCPA) and a 'Chosen' list. At the bottom, there is a 'Formula Options' section.

The screenshot shows the 'Formula Definition' section for the 'Wallet Balance (Currency)' field. It includes a 'Simple Formula' tab and an 'Advanced Formula' tab. The 'Simple Formula' tab is active, showing the formula: `Wallet Balance (Currency) = [Wallet_Balance] - [Bill_Amount]`. The formula is displayed in a text area with a 'Check Syntax' button below it. To the right, there is a 'Functions' section with a dropdown for 'All Function Categories' and a list of functions: ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. An 'Insert Selected Function' button is also present.

Wallet: Phone pay

Details

Wallet Name	Phone pay	Owner	SD R
Initial Balance	INR 10,000.00	Currency	INR - Indian Rupee
Bill	Current bill		
Wallet Balance	INR 9,500.00		
Created By	SD R, 12/12/2023, 11:43 AM	Last Modified By	SD R, 12/12/2023, 11:43 AM

Activity

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

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

- The field in wallet: wallet balance should have a validation process where wallet balance should never be negative.

SETUP > OBJECT MANAGER

Wallet

Details

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field: **Wallet_Balance__c** > 0

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message: **Wallet balance should not be negative...**

This error message can either appear at the top of the page or below a specific field on the page

Error Location: ☒ Top of Page ☐ Field

Save Save & New Cancel

SETUP

Object Manager

Wallet Validation Rule

Back to Wallet

Validation Rule Detail

Rule Name	No_negative_balance	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Wallet_Balance__c > 0	Error Location	Top of Page
Error Message	Wallet balance should not be negative...		
Description			
Created By	SD R, 12/12/2023, 11:46 AM	Modified By	SD R, 12/12/2023, 11:46 AM

Edit Clone

- Create a process that sends a mail if the wallet balance is less than 100.

Setup Home Object Manager

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Process Builder - send mail [Back To Setup](#) [Help](#)

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Define Criteria for this Action Group

☐ Formula evaluates to true
☐ No criteria—just execute the actions!

Set Conditions

Field*	Operator*	Type*	Value*
1 [Wallet_cj.Wal...Q	Equals	Currency	100

[Add Row](#)

Conditions*

☒ All of the conditions are met (AND)
☐ Any of the conditions are met (OR)
☐ Customize the logic

[Advanced](#)

[Save](#) [Cancel](#)

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Email Alert
Wallet Balance should not be less than 100.
[Back to List: Email Alerts](#) [Printable View](#) [Help for this Page](#)

[Rules Using This Email Alert \(0\)](#) | [Approval Processes Using This Email Alert \(0\)](#) | [Entitlement Processes Using This Email Alert \(0\)](#)

Email Alert Detail [Edit](#) [Delete](#) [Clone](#)

Description	Wallet Balance should not be less than 100.	Email Template	Wallet Balance
Unique Name	Wallet_Balance_should_not_be_less_than_100	Object	Wallet
From Email Address	Current User's email address		
Recipients	User: SDR User: Aquino Sales Manager		
Additional Emails			
Created By	SDR, 12/12/2023, 12:26 PM	Modified By	SDR, 12/12/2023, 12:26 PM

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Rules Using This Email Alert [Rules Using This Email Alert Help](#)

This alert is currently not used by any rules

Approval Processes Using This Email Alert [Approval Processes Using This Email Alert Help](#)

This alert is currently not used by any approval processes

Setup Home Object Manager

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[Expand All](#) [Collapse All](#) [View All Processes](#) [Clone](#) [View Properties](#) [Deactivate](#) [Read Only](#)

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- The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar, and utility icons. The breadcrumb trail is 'Setup > Object Manager'. The left sidebar contains a list of navigation options: Details, Fields & Relationships (selected), 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, and Scoping Rules.
- The main content area is titled 'New Custom Field' and is part of the 'Bill' object manager. It shows 'Step 4. Establish field-level security' of a 5-step process. The field details are as follows:
- | Field Label | Bill generated |
|-------------|----------------------------|
| Data Type | Roll-Up Summary |
| Field Name | Bill_generated |
| Description | Bill generated to the user |
- Below the field details, there is a section for 'Field-Level Security for Profile' with a table of profiles and their security settings.
- | Field-Level Security for Profile | <input type="checkbox"/> Visible | Read Only |
|----------------------------------|----------------------------------|-------------------------------------|
| Analytics Cloud Integration User | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Analytics Cloud Security User | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Contract Manager | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Cross Org Data Proxy User | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Custom: Marketing Profile | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Custom: Support Profile | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| CUSTOM SPU | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| CUSTOM SU | <input type="checkbox"/> | <input checked="" type="checkbox"/> |