

SFC-CAPSTONE-PROJECT-1

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 | c. Course Leads |
| b. Subjects | d. Technology |

The screenshot shows the Salesforce Setup interface for the 'Course' object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Details' and includes a description field, API Name (Course__c), Custom checkbox (checked), Singular Label (Course), Plural Label (Courses), and a list of settings: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are in the top right.

The screenshot shows the Salesforce Setup interface for the 'Subjects' object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Details' and includes a description field, API Name (Subjects__c), Custom checkbox (checked), Singular Label (Subjects), Plural Label (Subjects), and a list of settings: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are in the top right.

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

Details

Edit Delete

Description

API Name
Course_Lead__c

Custom
✓

Singular Label
Course Lead

Plural Label
Course Leads

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

SETUP > OBJECT MANAGER
Technology

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
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Compact Layouts
Field Sets
Object Limits
Record Types

Details

Edit Delete

Description

API Name
Technology__c

Custom
✓

Singular Label
Technology

Plural Label
Technologies

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

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 | f. Instructor Name |
| b. No. of Modules | g. Type of Co |
| c. Course Duration | h. Priority |
| d. Rating | i. Start Date |
| e. Active user | j. End Date |

SETUP > OBJECT MANAGER
Course

Details
Fields & Relationships
Page Layouts
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Compact Layouts
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Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Quick Find
New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Active user	Active__c	Checkbox		
Course Duration	Course_Duration__c	Picklist		
Course Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
End Date	End_Date__c	Date		
Instructor Name	Instructor_Name__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
No. of Modules	No_of_Modules__c	Picklist		

SETUP > OBJECT MANAGER

Course

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Restriction Rules

Scoping Rules

Fields & Relationships

14 Items, Sorted by Field Label

New

Deleted Fields

Field Dependencies

Set History Tracking

Currency	CurrencyIsoCode	Picklist	
End Date	End_Date__c	Date	
Instructor Name	Instructor_Name__c	Picklist	
Last Modified By	LastModifiedById	Lookup(User)	
No. of Modules	No_of_Modules__c	Picklist	
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	

Marketing

Home

Chatter

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Leads

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Opportunities

Reports

Dashboards

New Courses

Users

Wallets

Bills

Courses

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Star

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Notifications

Profile

Course

Ram

New Contact

Edit

New Opportunity

Calendar

Tasks

Messages

Files

Filters: All time • All activities • All types

Refresh • Expand All • View All

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.

Course Name

Ram

Start Date

End Date

Rating

No. of Modules

Active user

Course Duration

Priority

Instructor Name

Type of Course

Owner

SD R

Currency

INR - Indian Rupee

Created By

SD R, 1/9/2024, 3:03 PM

Last Modified By

SD R, 1/9/2024, 3:03 PM

B. Subject:

a. Subject Name

c. Instructor Name

e. Priority

g. Level

b. No. of Modules

d. Rating

f. Category

SETUP > OBJECT MANAGER

Subjects

Details

Fields & Relationships

12 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Category	Category__c	Picklist (Multi-Select)	Subject Name	
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Instructor Name	Instructor_Name__c	Picklist	Subject Name	
Last Modified By	LastModifiedById	Lookup(User)		
Level	Level__c	Picklist		
No. of Modules	No_of_Modules__c	Picklist	Subject Name	
Owner	OwnerId	Lookup(User,Group)		✓
Priority	Priority__c	Picklist		
Rating	Rating__c	Picklist		
Subject Name	Subject_Name__c	Picklist		
User Name	Name	Text(80)		✓

SETUP > OBJECT MANAGER

Subjects

Details

Fields & Relationships

12 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Currency	CurrencyIsoCode	Picklist		
Instructor Name	Instructor_Name__c	Picklist	Subject Name	
Last Modified By	LastModifiedById	Lookup(User)		
Level	Level__c	Picklist		
No. of Modules	No_of_Modules__c	Picklist	Subject Name	
Owner	OwnerId	Lookup(User,Group)		✓
Priority	Priority__c	Picklist		
Rating	Rating__c	Picklist		
Subject Name	Subject_Name__c	Picklist		
User Name	Name	Text(80)		✓

Marketing

Home

Chatter

Campaigns

Subjects

Recently Viewed

0 items • Updated a few seconds ago

User Name

Information

User Name

Sita

Instructor Name

Venkat

Priority

High

Level

Moderate

No. of Modules

10 Modules

View all dependencies

Rating

--None--

Subject Name

Cloud Computing

View all dependencies

Owner

SD R

Currency

INR - Indian Rupee

Category

Business

Cancel

Save & New

Save

New

Import

Change Owner

Instructor Name

Marketing Home Chatter Camps

Subjects Recently Viewed

Items Updated a few seconds ago

User Name

Moderate

No. of Modules: 10 Modules

Rating: --None--

Subject Name: Cloud Computing

Category

Available: Web Development

Chosen: Cloud

Cancel Save & New Save

C. Course Leads:

- | | | |
|---------------|-------------|-----------------------|
| a. First Name | e. Source | i. Course Lead Amount |
| b. Last Name | f. Category | |
| c. Phone | g. Rating | |
| d. Email | h. Currency | |

SETUP > OBJECT MANAGER

Course Leads

Details

Fields & Relationships

13 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Category	Category__c	Picklist		
Course Lead Amount	Course_Lead_Amount__c	Currency(8, 2)		
Created By	CreatedById	Lookup(User)		
Currency	Currency__c	Currency(8, 2)		
Currency	CurrencyIsoCode	Picklist		
Email	Email__c	Email (External ID) (Unique)		✓
First Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Last Name	Last_Name__c	Text(55)		

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

SETUP > OBJECT MANAGER

Course Leads

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Fields & Relationships
13 Items. Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

Currency	Currency__c	Currency(8, 2)		
Currency	CurrencyIsoCode	Picklist		
Email	Email__c	Email (External ID) (Unique)	✓	
First Name	Name	Text(80)	✓	
Last Modified By	LastModifiedById	Lookup(User)		
Last Name	Last_Name__c	Text(55)		
Owner	OwnerId	Lookup(User,Group)	✓	
Phone	Phone__c	Phone		
Rating	Rating__c	Picklist		
Source	Source__c	Picklist		

Marketing Home Chatter Campaigns

Course Leads Recently Viewed 0 Items • Updated a few seconds ago

First Name

First Name

Last Name

Phone

Email

Currency

Rating

Category

Source

Course Lead Amount

Owner SD R

Currency INR - Indian Rupee

Cancel Save & New Save

D. Technology

- | | |
|-------------|--------------------|
| a. Name | f. Instructor Name |
| b. Type | i. Mobile |
| c. Category | ii. Email |
| d. Rating | iii. Qualification |
| e. Active | iv. Availability |

SETUP > OBJECT MANAGER

Technology

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Fields & Relationships

14 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Active	Active__c	Checkbox		
Availability	Availability__c	Picklist		
Category	Category__c	Picklist	Type	
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Email	Email__c	Email (External ID) (Unique)		✓
Instructor Name	Instructor_Name__c	Picklist	Type	
Last Modified By	LastModifiedById	Lookup(User)		
Mobile	Mobile__c	Phone		

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Fields & Relationships

14 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Currency	CurrencyIsoCode	Picklist		
Email	Email__c	Email (External ID) (Unique)		✓
Instructor Name	Instructor_Name__c	Picklist	Type	
Last Modified By	LastModifiedById	Lookup(User)		
Mobile	Mobile__c	Phone		
Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Qualification	Qualification__c	Picklist		
Rating	Rating__c	Picklist		
Type	Type__c	Picklist		

Search...

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Chatter

Camp

Information

* Name

Type

Category

Rating

Active

Instructor Name

Mobile

Email

Owner

Currency

Cancel

Save & New

Save

SD R

INR - Indian Rupee

Category: --None--

Rating: --None--

Active: ☐

Instructor Name: --None--
[View all dependencies](#)

Mobile:

Email:

Qualification: --None--

Availability: --None--

Buttons: Cancel, Save & New, Save

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

Course Validation Rule

[Back to Course](#) [Help for this Page](#)

Validation Rule Detail		Edit		Clone	
Rule Name	fields_are_not_empty	Active	<input checked="" type="checkbox"/>		
Error Condition Formula	ISBLANK(Name) ISBLANK(TEXT(Course_Duration__c)) ISBLANK(TEXT(No_of_Modules__c)) ISBLANK(TEXT(Instructor_Name__c)) ISBLANK(TEXT(Priority__c)) ISBLANK(TEXT(Rating__c)) ISBLANK(End_Date__c) ISBLANK(Start_Date__c) IF(Active__c = FALSE, TRUE, FALSE) ISBLANK(TEXT(Type_of_Course__c))				
Error Message	Fill all the fields...	Error Location	Top of Page		
Description					
Created By	SD.B 1/9/2024, 3:08 PM	Modified By	SD.B 1/9/2024, 3:08 PM		

Buttons: Edit, Clone

Click to go back, hold to see history

Search...

Marketing Home Chatter Camps

Course **Ram**

Related **Details**

Course Name
Ram

Start Date

End Date
2/15/2024

Rating
Hot

No. of Modules
8 Modules

Active user
☐

Course Duration
3 Months

Priority
--None--

Instructor Name
Venkat

Type of Course
Webinars

Currency
INR - Indian Rupee

We hit a snag.
Review the errors on this page.
Fill all the fields...

Cancel Save & New Save

Filters: All time • All activities • All types
Refresh • Expand All • View All

No activities to show.
Sending an email, scheduling a task, and more.

meetings and tasks marked as done show up here.

Setup Home Object Manager

Search Setup

Subjects

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Subjects Validation Rule

Back to Subjects

Validation Rule Detail

Rule Name Fields_require Edit Clone

Active ☒

Error Condition Formula
ISBLANK(Name) || ISBLANK(TEXT(Subject_Name__c)) || ISBLANK(TEXT(Rating__c)) || ISBLANK(TEXT(Priority__c)) || ISBLANK(TEXT(No_of_Modules__c)) || ISBLANK(TEXT(Instructor_Name__c)) || ISBLANK(TEXT(CurrencyIsoCode)) || ISBLANK(Category__c) || ISBLANK(TEXT(Line__c))

Error Message Fields are required.

Error Location Top of Page

Description

Created By SD_R 12/20/2023, 4:47 PM Edit Clone

Modified By SD_R 12/20/2023, 4:48 PM

Home Chatter Campaigns Leads Contacts Opportunities Reports Dashboards New Courses Users Wallets Bills Courses **Subjects** Technologies Course Leads +

Create New...

Subjects Edit

Ram

Recent Items

Ram

Recycle Bin

Subjects Edit

Save Save & New Cancel

Error: Invalid Data.
Review all error messages below to correct your data.
Fields are required...

Information

User Name Ram

Subject Name Cloud Computing

Category Available
Web Development

No. of Modules 10 Modules

Instructor Name Venkat

Owner SD_R

Currency INR - Indian Rupee

Level --None--

Rating Hot

Priority Medium

Save Save & New Cancel

= Required Information

SETUP > OBJECT MANAGER

Course Leads

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Course Leads Validation Rule

Back to Course Leads

Help for this Page

Validation Rule Detail

EditClone

Active

✓

Error Condition Formula

ISBLANK(Last_Name__c) || ISBLANK(TEXT(Category__c)) || ISBLANK(Email__c) || ISBLANK(TEXT(Rating__c)) || ISBLANK(TEXT(Source__c)) || ISBLANK(Name) || ISBLANK(TEXT(CurrencyIsoCode)) || ISBLANK(Course_Lead_Amount__c) || ISBLANK(Phone__c)

Error Message

Fill the blank...

Error Location

Top of Page

Description

Created By

SD R 12/20/2023, 4:10 PM

Modified By

SD R 12/20/2023, 4:31 PM

EditClone

salesforce

24

Search...

Search

Switch to Lightning Experience

SD R

Setup

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Bills

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Subjects

Technologies

Course Leads

+

Create New...

Recent Items

Ram

Recycle Bin

Course Leads Edit

SaveSave & NewCancel

Error: Invalid Data.
Review all error messages below to correct your data.
Fill the blank...

Information

First Name

Ram

Owner

SD R

Last Name

P

Currency

INR - Indian Rupee

Phone

1246387879

Email

sr12@gmail.com

Rating

Hot

Category

Student

Source

--None--

Course Lead Amount

Save

Save & New

Cancel

Setup

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Object Manager

SETUP > OBJECT MANAGER

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Technology Validation Rule

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Help for this Page

Validation Rule Detail

EditClone

Active

✓

Error Condition Formula

IF(Active__c = FALSE, TRUE, FALSE) || ISBLANK(Name) || ISBLANK(TEXT(Availability__c)) || ISBLANK(TEXT(Category__c)) || ISBLANK(TEXT(CurrencyIsoCode)) || ISBLANK(TEXT(Instructor_Name__c)) || ISBLANK(TEXT(Type__c)) || ISBLANK(TEXT(Rating__c)) || ISBLANK(TEXT(Qualification__c)) || ISBLANK(Module__c)

Error Message

Field require value...

Error Location

Top of Page

Description

Created By

SD R 12/19/2023, 3:21 PM

Modified By

SD R 12/21/2023, 12:18 PM

EditClone

Home Chatter Campaigns Leads Contacts Opportunities Reports Dashboards New Courses Users Wallets Bills Courses Subjects **Technologies** Course Leads +

Create New...

Recent Items

- Ram
- Ram

Recycle Bin

Technology Edit

Save Save & New Cancel

Error: Invalid Data.
Review all error messages below to correct your data.
Field require value...

Information

Name **Ram**

Type Information Technology

Category Artificial Intelligence

Rating --None--

Active ☐

Instructor Name Venkat

Mobile 1234567892

Email sr@gmail.com

Qualification Under Graduate

Availability Week Days

Owner SD R

Currency INR - Indian Rupee

Save Save & New Cancel

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.

Home Chatter Campaigns Leads Contacts Opportunities Reports Dashboards New Courses Users Wallets Bills **Courses** Subjects Technologies Course Leads +

Create New...

Recent Items

- HighPriorityPython
- Ram
- Ram
- SD R
- 000010229
- 00001003
- 00001005
- 000010228
- Reshma S

Recycle Bin

Course HighPriorityPython

Open Activities (0) | Activity History (0)

Course Detail

Edit Delete Clone Sharing

Course Name HighPriorityPython

Start Date 1/11/2024

End Date 1/24/2024

Rating Hot

No. of Modules 8 Modules

Active user ☒

Course Duration 3 Months

Priority High

Instructor Name Venkat

Type of Course Week days

Created By SD R, 1/9/2024, 4:44 PM

Owner SD R [Change]

Last Modified By SD R, 1/9/2024, 4:45 PM

Edit Delete Clone Sharing

Open Activities

New Task New Event

No records to display

Activity History

Log a Call Mail Merge Send an Email

No records to display

Open Activities Help

Activity History Help

Back To Top

Always show me more records per related list

- If the course lead amount is greater than USD \$1000 then update the name field to 'Top Priority Customer'+ Name.

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TopPriorityCustomer Ram
New Contact
Edit
New Opportunity

Related
Details

First Name
TopPriorityCustomer Ram
Last Name
P
Phone
(123) 456-7899
Email
sr7@gmail.com
Rating
Hot
Category
Student
Source
College Placement
Course Lead Amount
INR 990,000.00

Owner
SD R
Currency
INR - Indian Rupee

Created By
SD R, 12/21/2023, 12:40 PM
Last Modified By
SD R, 12/21/2023, 12:40 PM

Activity

Filters: All time • All activities • All types
Refresh
Expand All
View All

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.

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

case

Name

Phone

Email

Subject

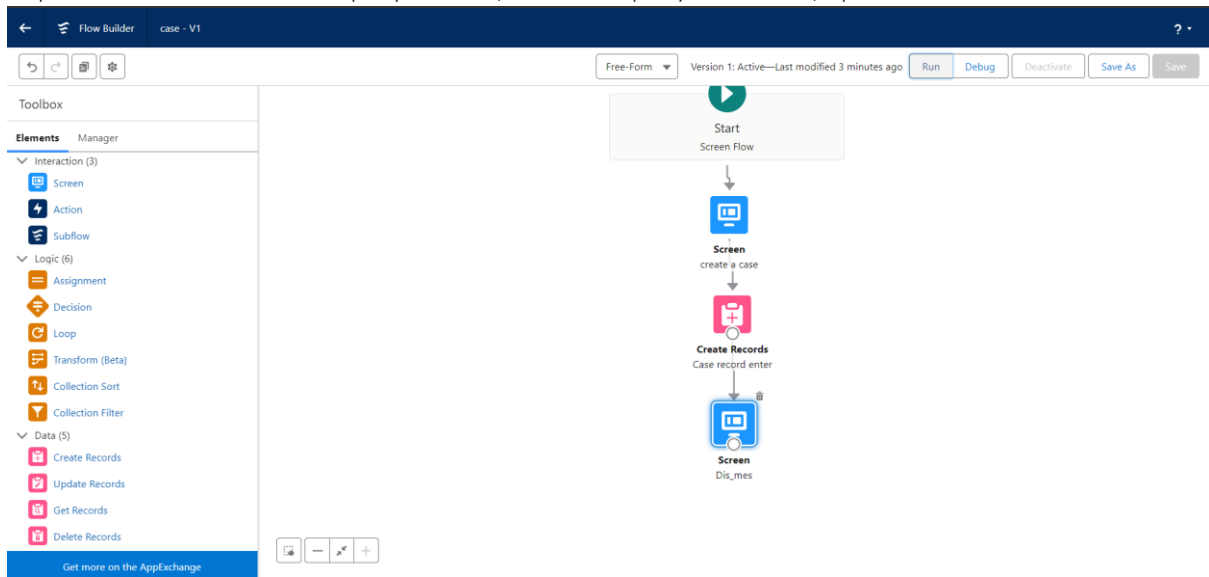
Instructor Name

Query Description

Courses Enrolled

Submit

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'.



Action	Order	Criteria	Assign To	Email
Edit	1	Case: Escalated EQUALS TRUE	SD_R	<input checked="" type="checkbox"/>

