

# SFC-MODULE-8-ASSIGNMENT-1

## Tasks To Be Performed:

1. Create a validation rule for the Accounts object where the type is 'Customer-direct' and industry is '' with an error message 'Please provide industry type'.

The screenshot shows the 'Object Manager' interface in Salesforce. Under the 'Account' object, a 'Validation Rule' is being configured. The rule is named 'Industry\_required' and is active. The error condition formula is 'AND(ISPICKVAL(Type, "Customer - Direct"), ISPICKVAL(Industry, ""))'. The error message is 'Please provide industry type for direct customer.' and the error location is 'Top of Page'. The rule was created by 'SD.B.' on 11/7/2023 at 3:55 PM and was last modified by 'SD.B.' on the same date and time.

Validation Rule Detail	
Rule Name	Industry_required
Error Condition Formula	AND( ISPICKVAL(Type, "Customer - Direct"), ISPICKVAL(Industry, "") )
Error Message	Please provide industry type for direct customer.
Error Location	Top of Page
Description	
Created By	SD.B. 11/7/2023, 3:55 PM
Modified By	SD.B. 11/7/2023, 3:55 PM

2. Create workflow rules for the Opportunity object where the opportunity amount is greater than US\$1000. Add workflow actions for updating the Opportunity field with the formula 'VIP Customer' + Name if the amount of the opportunity is greater than US\$1000.

The screenshot shows the 'Workflow Rules' page in Salesforce. The 'All Workflow Rules' section is active, displaying a list of workflow rules. A yellow banner at the top encourages users to migrate their workflow rules to Flow Builder. Below the banner, there is a 'Quick Tips' section with links to 'Useful Sample Workflow Rules', 'Video Tutorial (English Only)', and 'Troubleshooting Workflow'. The main table shows a single workflow rule named 'Opportunity\_Rule' for the 'Opportunity' object, which is currently inactive.

**Quick Tips**

- [Useful Sample Workflow Rules](#)
- [Video Tutorial \(English Only\)](#)
- [Troubleshooting Workflow](#)

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a>	Opportunity_Rule		Opportunity	<input type="checkbox"/>

SETUP

Workflow Rules

Edit Rule Opportunity Rule

Help for this Page

Step 3: Specify Workflow Actions

Step 3 of 3

Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria

Opportunity: Amount GREATER THAN "USD 1,000"

Evaluation Criteria

Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

Action	Type	Description
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	<a href="#">Update Opportunity</a>

Add Workflow Action

Time-Dependent Workflow Actions

[See an example](#)

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger

- Create a flow for sending an email with Screen Flow as 'Auto launched Flow' and add the flow to the Leads object.

Flow Builder

Send Email - V1

Free-Form

Version 1: Active—Last modified 7 minutes ago

Run

Debug

Deactivate

Save As

Save

Toolbox

Elements

Manager

Interaction (2)

Action

Subflow

Logic (9)

Assignment

Decision

Wait for Conditions

Wait for Amount of Time

Wait Until Date

Loop

Transform (Beta)

Collection Sort

Collection Filter

Data (4)

Create Records

Start

Autolaunched Flow

Action

Send Email

Lightning App Builder

Pages

Lead Record Page

Desktop

Shrink To View

Analyze

Activation...

Save

Components

Fields

Standard (2)

Flow

Flow Orchestration Work Guide

Custom (0)

Custom - Managed (0)

Lead: SD Reshma

Follow

New Case

New Note

Submit for Approval

Title

Company

Phone ID

Email

Flow Component: Book Appointment from Invitation

This is a placeholder. Flows don't run in the canvas.

Open - Not Contacted

Working - Contacted

Closed - Not Contacted

Contacted

Mark Status as Complete

Activity

Details

Chatter

News

New Text

Log a Call

New Event

Email

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overview

No activities to show.

Get started by sending an email, scheduling a text, and more.

October 2023

Email: Thank you for your interest

You sent an email

Last Month

No more past activities to load.

Related

We found no potential duplicates of this Lead.

Campaign History (1)

Grammate

Start Date

Type

Status

Trade Show

Responded

View All

Page > Flow

Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.

Flow

Book Appointment from Invitation

Edit Flow in Flow Builder

Layout

One Column

Optionally, enter values for these flow variables. Only variables that allow input access are supported.

invitationKey

Pass record ID into this variable

parentRecordId

Pass record ID into this variable

4. Create a process builder for the Opportunity object with an amount field. When the opportunity amount is US\$5000, update the record as 'VIP Customer'.

