

Custom objects Creation-

A. Course

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various configuration options: 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, and Scoping Rules. The main area is titled 'Course' under 'SETUP > OBJECT MANAGER'. It displays the 'Details' tab with fields for Description, API Name (set to 'Course__c'), Singular Label (set to 'Course'), and Plural Label (set to 'Courses'). On the right, there are sections for 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings'. A note at the bottom states 'Standard salesforce.com Help Window'. At the top right, there are 'Edit' and 'Delete' buttons. The browser address bar shows the URL: https://intellipaat73-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dM000002LUNI/Details/view.

B. Subject

The screenshot shows the Salesforce Object Manager interface. The sidebar and main structure are identical to the 'Course' creation screen. The main area is titled 'Subject' under 'SETUP > OBJECT MANAGER'. It displays the 'Details' tab with fields for Description, API Name (set to 'Subject__c'), Singular Label (set to 'Subject'), and Plural Label (set to 'Subjects'). On the right, there are sections for 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings'. A note at the bottom states 'Standard salesforce.com Help Window'. At the top right, there are 'Edit' and 'Delete' buttons. The browser address bar shows the URL: https://intellipaat73-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dM000002LIPN/Details/view.

C. Course lead

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "Course lead". On the left, a sidebar lists various configuration options under "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, and Scoping Rules. The right panel displays the "Details" section for the "Course lead" object. It includes fields for Description, API Name (Course_lead__c), Singular Label (Course lead), Plural Label (Course leads), and several checkboxes for "Enable Reports" (Track Activities, Track Field History, Deployment Status, Help Settings). A note at the bottom states "Standard salesforce.com Help Window". The status bar at the bottom shows the URL https://intellipaat73-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdM000002UQz/Details/view, the date 30-08-2024, and the time 19:16.

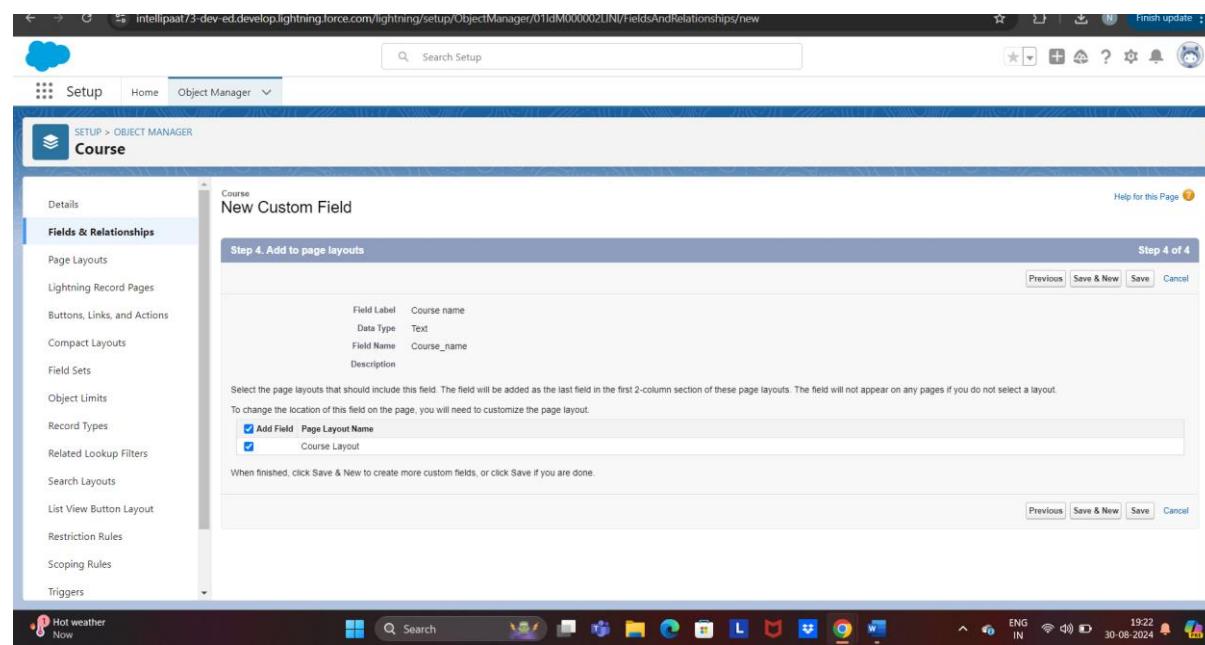
D. Technology

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "Technology". The left sidebar lists the same configuration options as the previous screenshot. The right panel displays the "Details" section for the "Technology" object. It includes fields for Description, API Name (Technology__c), Singular Label (Technology), Plural Label (Technologies), and the same set of "Enable Reports" checkboxes as the "Course lead" object. A note at the bottom states "Standard salesforce.com Help Window". The status bar at the bottom shows the URL https://intellipaat73-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdM000002U1Vp/Details/view, the date 30-08-2024, and the time 19:17.

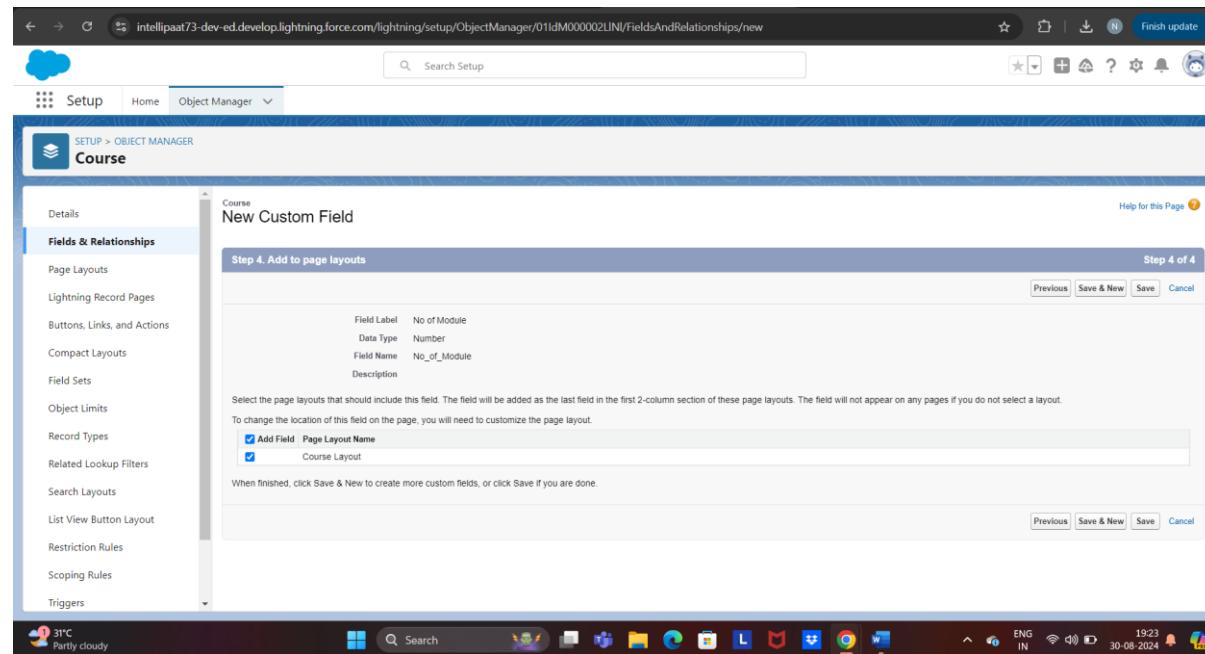
Create objects fields-

A. Course-

1. Course name



2. No of Modules



3. Course Duration

End date and Start date

intellipaat73-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002LNU/FieldsAndRelationships/new

Setup Home Object Manager

Course

Course New Custom Field

Step 4 of 4

Field Label: End date
Data Type: Date
Field Name: End_date
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.

Add Field - Page Layout Name
 Course Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

31°C Partly cloudy

Search

ENG IN 19:27 30-08-2024

intellipaat73-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002LNU/FieldsAndRelationships/new

Setup Home Object Manager

Course

Course New Custom Field

Step 4 of 4

Field Label: Start date
Data Type: Date
Field Name: Start_date
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.

Add Field - Page Layout Name
 Course Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

31°C Partly cloudy

Search

ENG IN 19:27 30-08-2024

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Fahrenheit = 1.8 * Celsius_c + 32 | More Examples...

Simple Formula **Advanced Formula**

Course duration (Number) =
End_date_c - Start_date_c

Insert Field Insert Operator Functions

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Quick Tips

- Getting Started
- Operators & Functions

Step 5. Add to page layouts

Field Label: Course duration
Data Type: Formula
Field Name: Course_duration
Description:

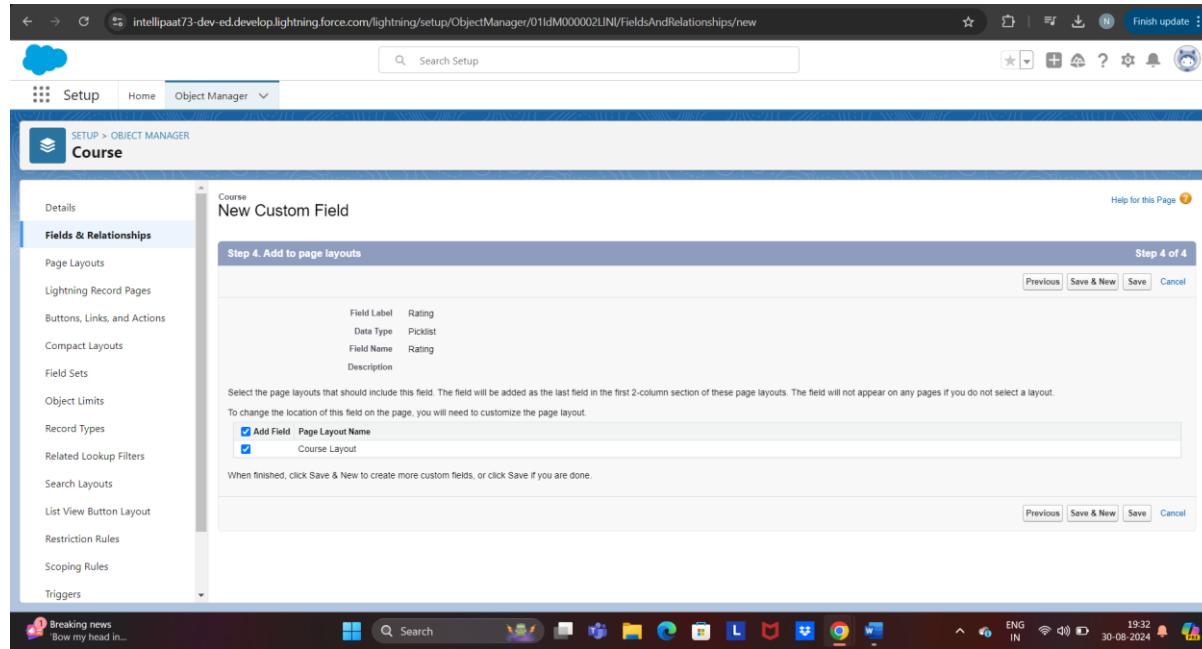
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

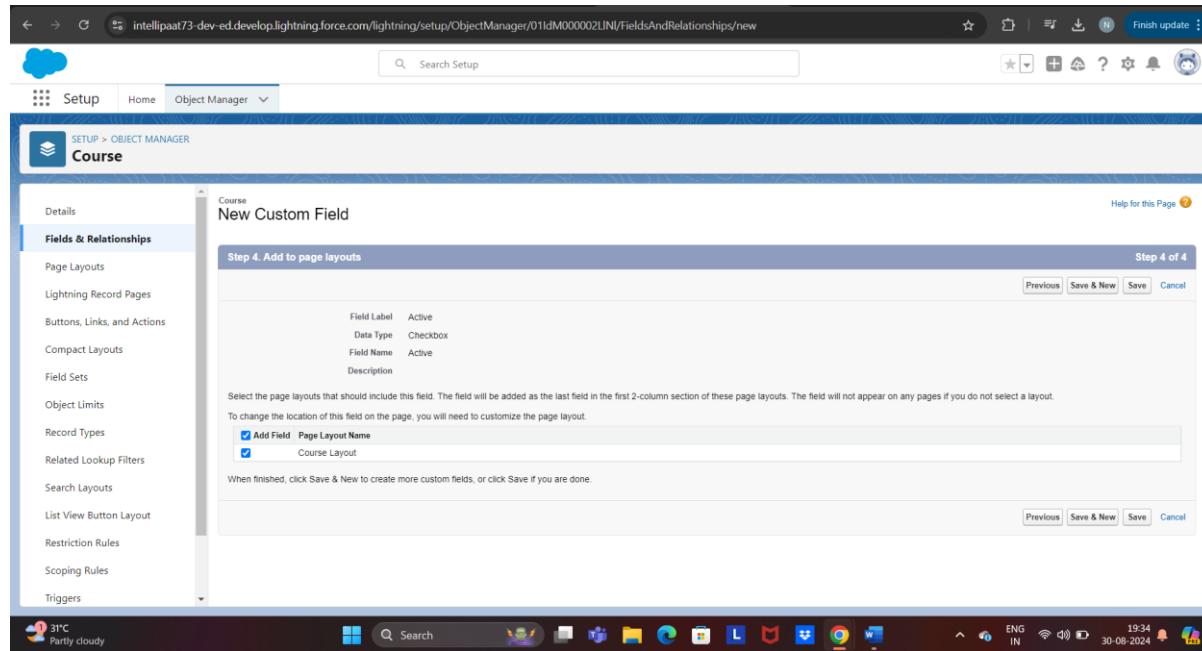
Add Field Page Layout Name
 Course Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

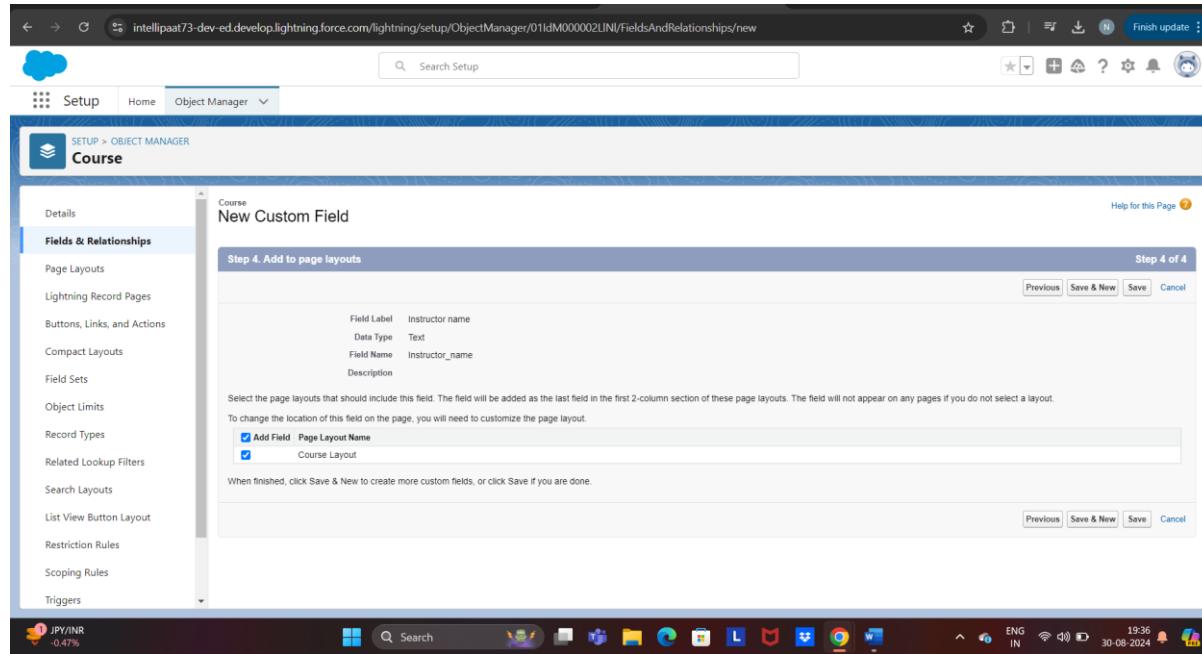
4. Rating



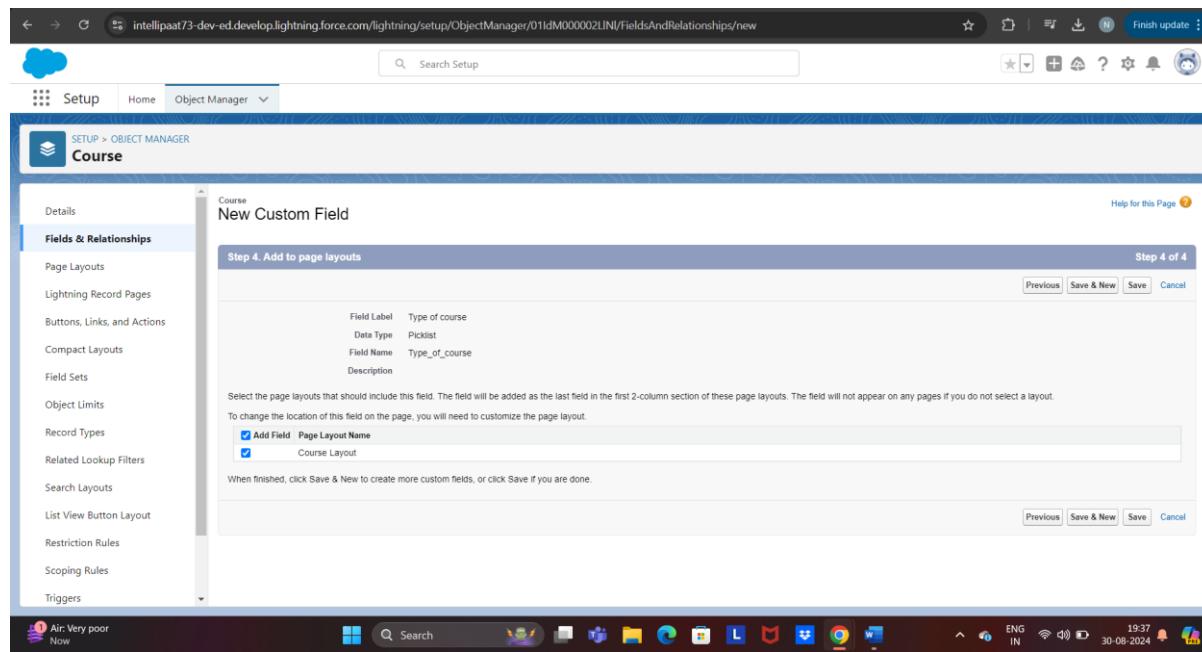
5. Active



6. Instructor name



7. Type of course



8. Priority

intellipaat73-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdM000002LNU/FieldsAndRelationships/new

Setup Home Object Manager Course

New Custom Field

Step 2. Enter the details

Field Label: Priority

Values:

Use global picklist value set
 Enter values, with each value separated by a new line

1
2
3
4
5

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set

Field Name: Priority

Description:

Step 2 of 4

Help for this Page

Previous Next Cancel

Hot weather Now

intellipaat73-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdM000002LNU/FieldsAndRelationships/new

Setup Home Object Manager Course

New Custom Field

Step 4. Add to page layouts

Field Label: Priority
Data Type: Picklist
Field Name: Priority
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field - Page Layout Name
 Course Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Step 4 of 4

Help for this Page

Previous Save & New Save Cancel

Hot weather Now

B. Subject fields-

1. Subject name

The screenshot shows the Salesforce Object Manager interface for creating a new custom field named "Subject". The current step is "Step 4. Add to page layouts" of 4. The field details are as follows:

Field Label	Subject name
Data Type	Text
Field Name	Subject_name
Description	(empty)

The "Add Field" section includes checkboxes for "Page Layout Name" (checked) and "Subject Layout" (checked). A note at the bottom says, "When finished, click Save & New to create more custom fields, or click Save if you are done." Navigation buttons at the bottom right include Previous, Save & New, Save, and Cancel.

2. No of Modules

The screenshot shows the Salesforce Object Manager interface for creating a new custom field named "No of Module". The current step is "Step 4. Add to page layouts" of 4. The field details are as follows:

Field Label	No of Module
Data Type	Number
Field Name	No_of_Module
Description	(empty)

The "Add Field" section includes checkboxes for "Page Layout Name" (checked) and "Subject Layout" (checked). A note at the bottom says, "When finished, click Save & New to create more custom fields, or click Save if you are done." Navigation buttons at the bottom right include Previous, Save & New, Save, and Cancel.

3. Instructor name

The screenshot shows the Salesforce Object Manager interface for creating a new custom field named 'Instructor name'. The field is defined as a Text type with the internal name 'Instructor_name'. The current step is 'Step 4. Add to page layouts'. Under 'Page Layouts', the 'Subject Layout' is selected. The status bar at the bottom indicates it's 31°C and partly cloudy.

Field Label: Instructor name
Data Type: Text
Field Name: Instructor_name
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

Add Field - Page Layout Name
 Subject Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

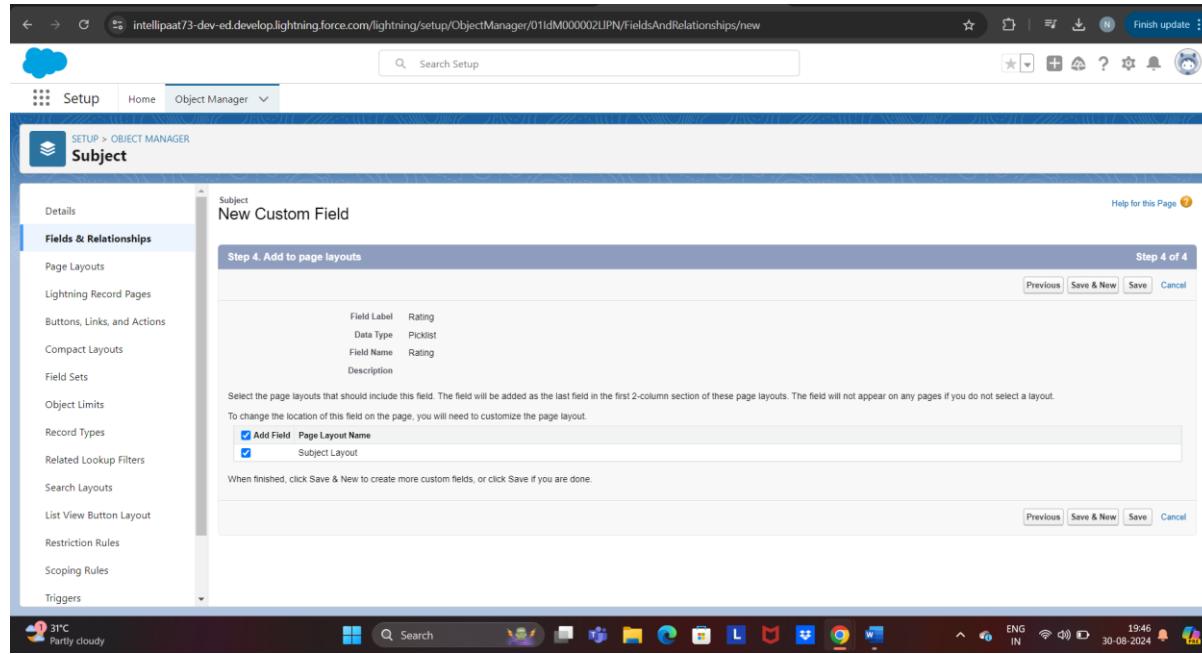
4. Rating

The screenshot shows the Salesforce Object Manager interface for creating a new custom field named 'Rating'. The field is defined as a picklist type with the internal name 'Rating'. The current step is 'Step 2. Enter the details'. The field label is 'Rating'. The values are defined as a picklist with options 1, 2, 3, and 4. The 'Enter values, with each value separated by a new line' option is selected. Other settings include 'Display values alphabetically, not in the order entered' and 'Restrict picklist to the values defined in the value set'. The status bar at the bottom indicates it's 31°C and partly cloudy.

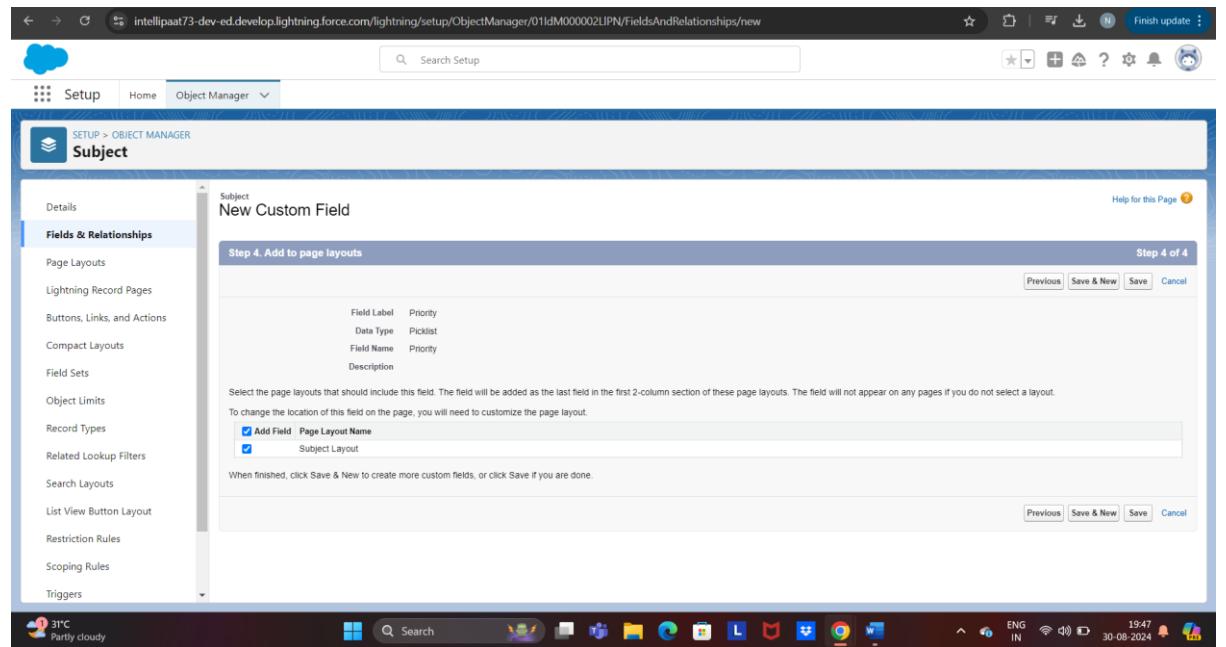
Field Label: Rating
Values:
 Use global picklist value set
 Enter values, with each value separated by a new line
1
2
3
4

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set

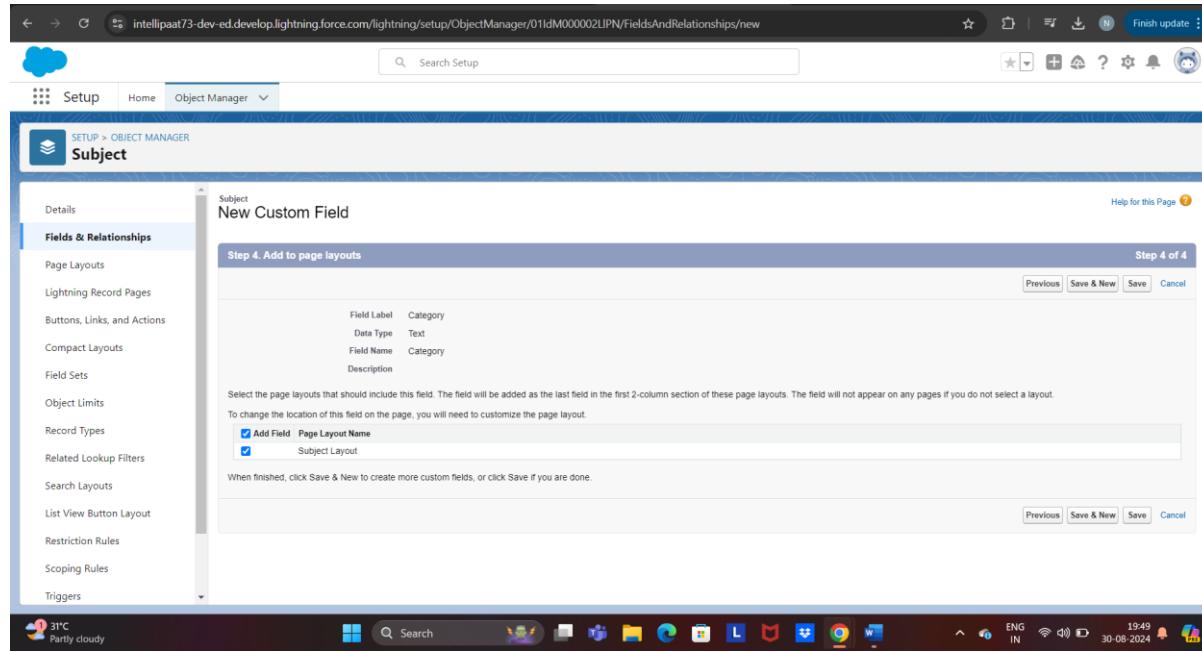
Field Name: Rating
Description:



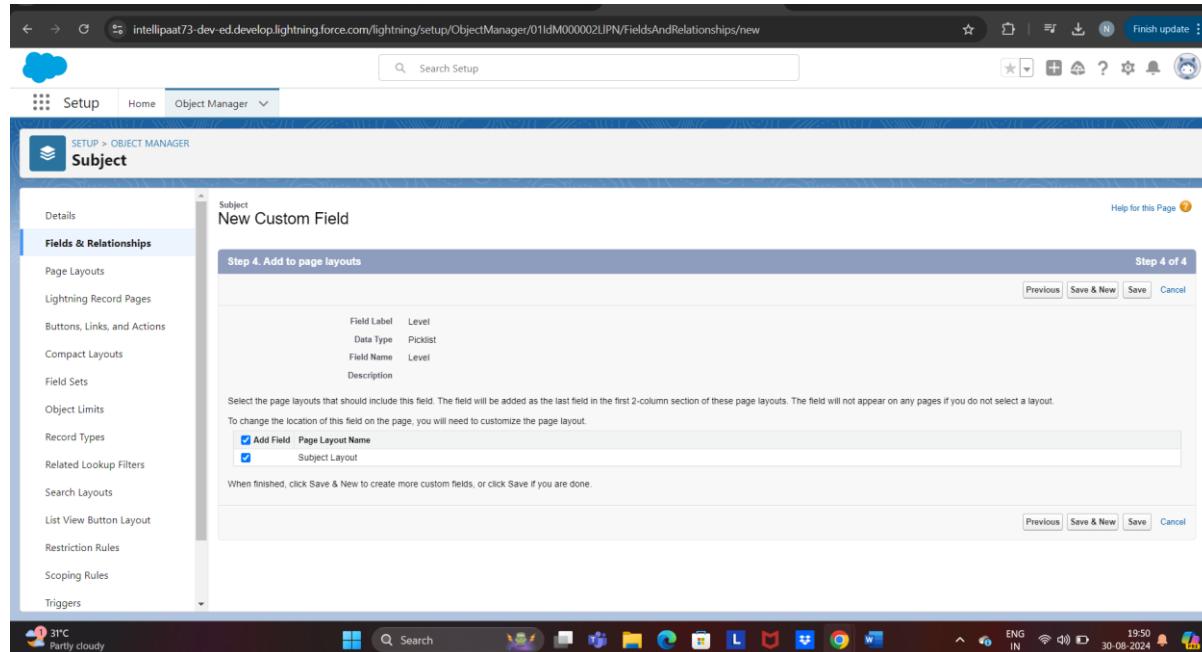
5. Priority



6. Category

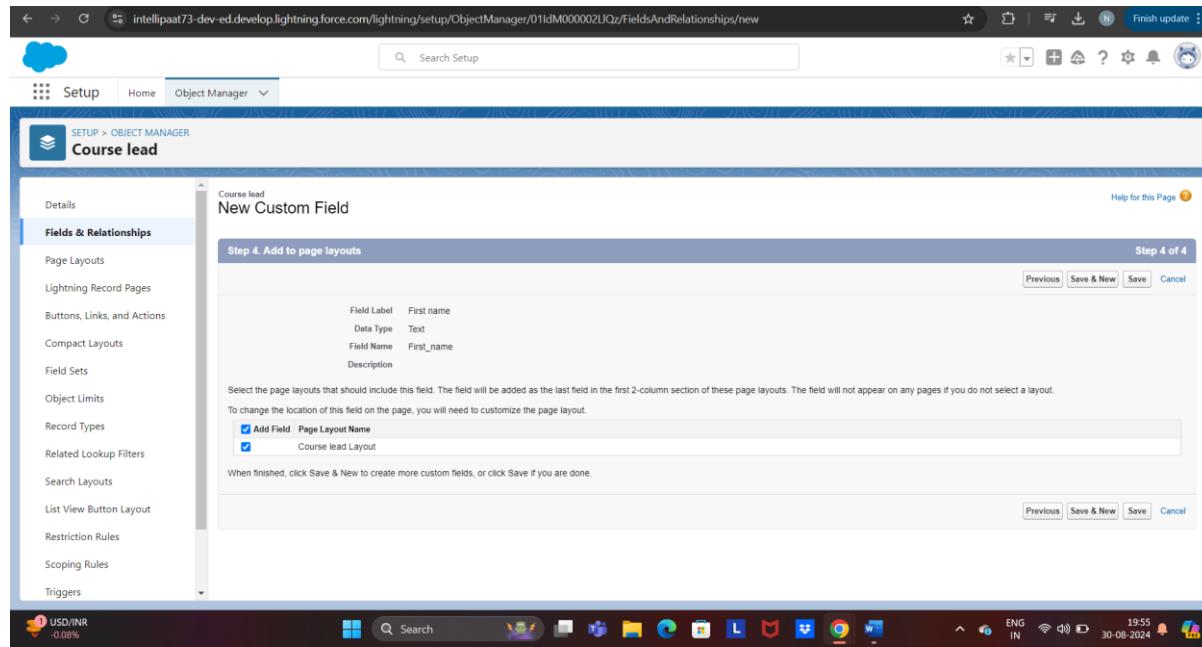


7. Level

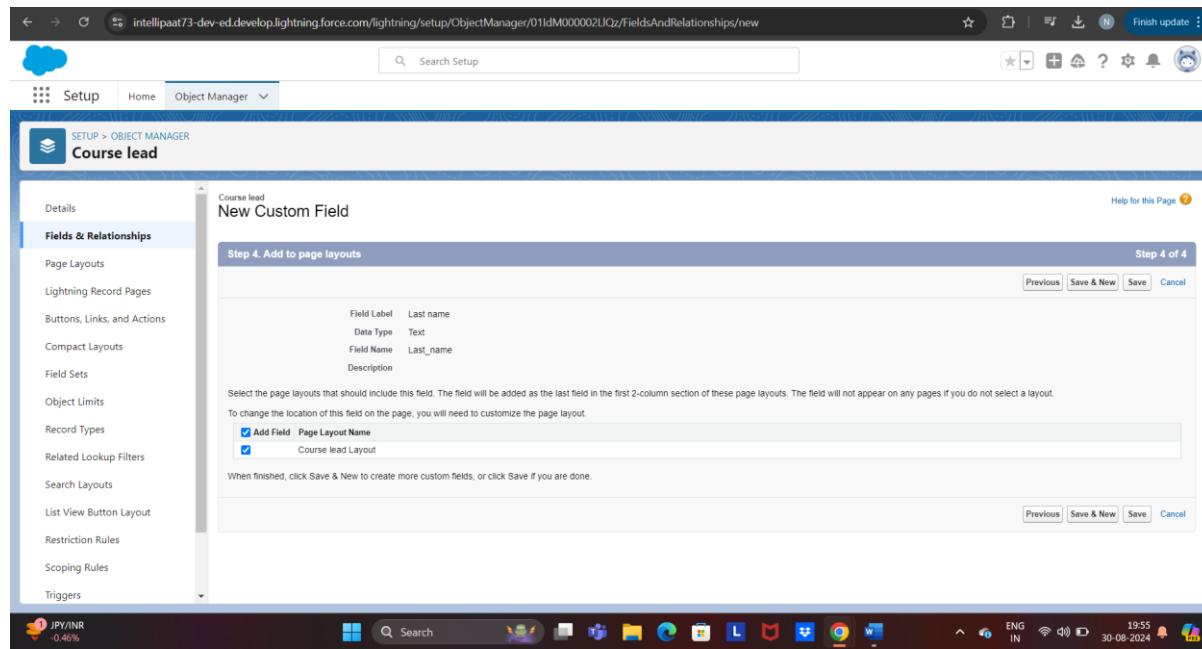


C. Course Leads

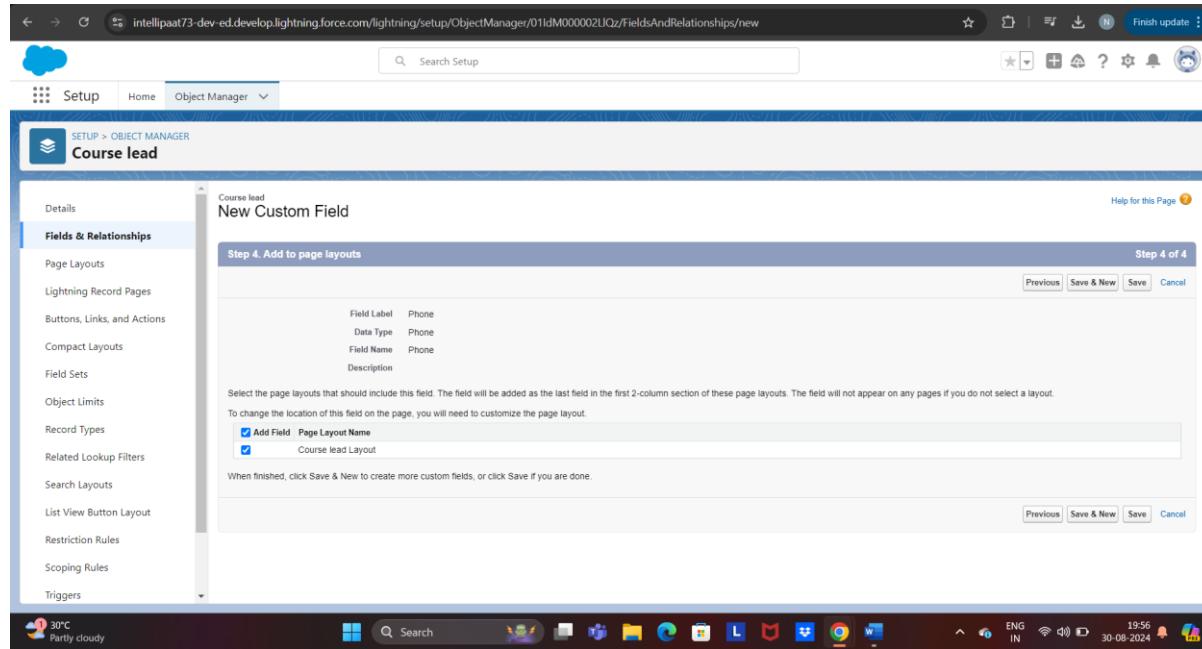
1. First Name



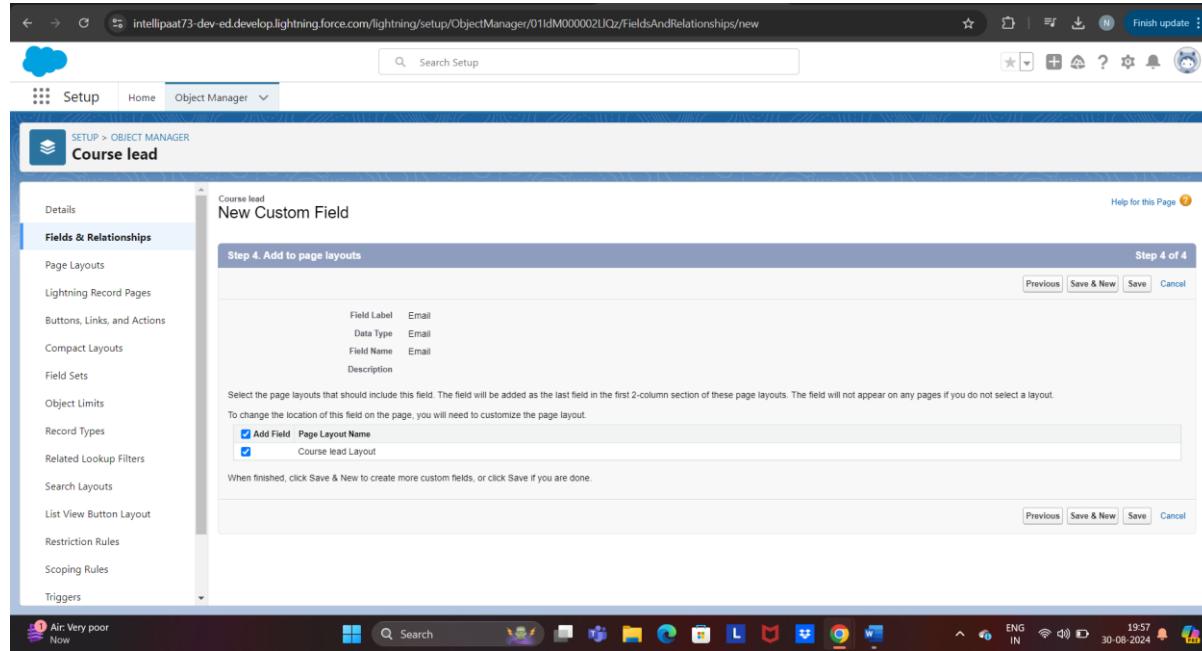
2. Last name



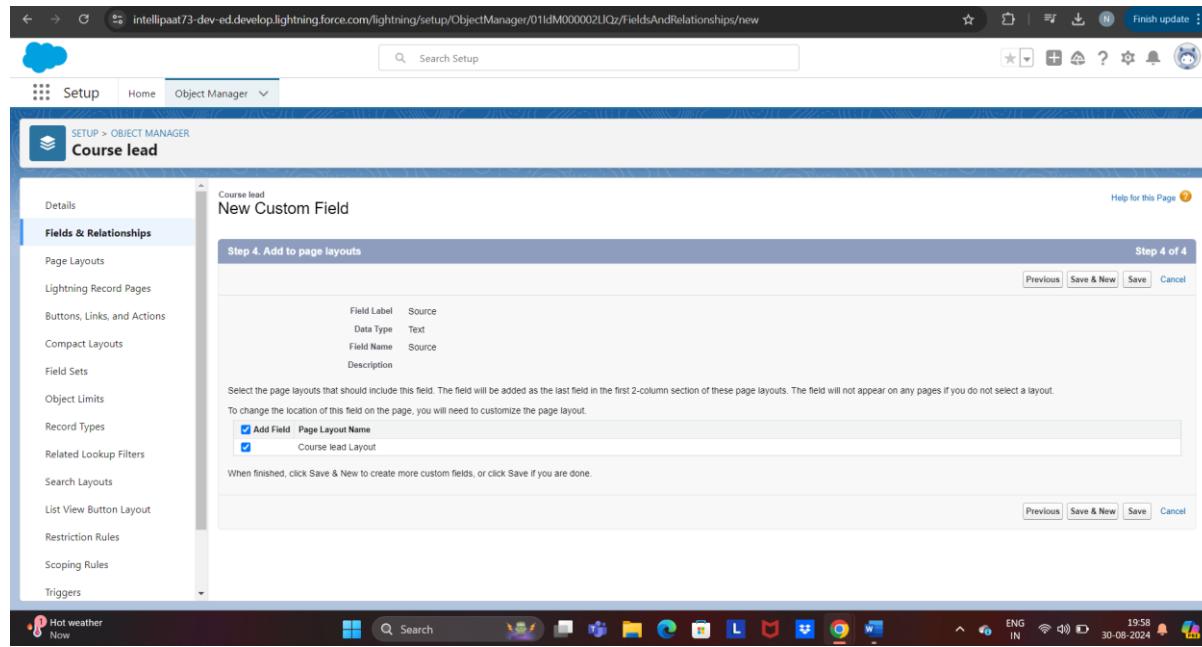
3. Phone



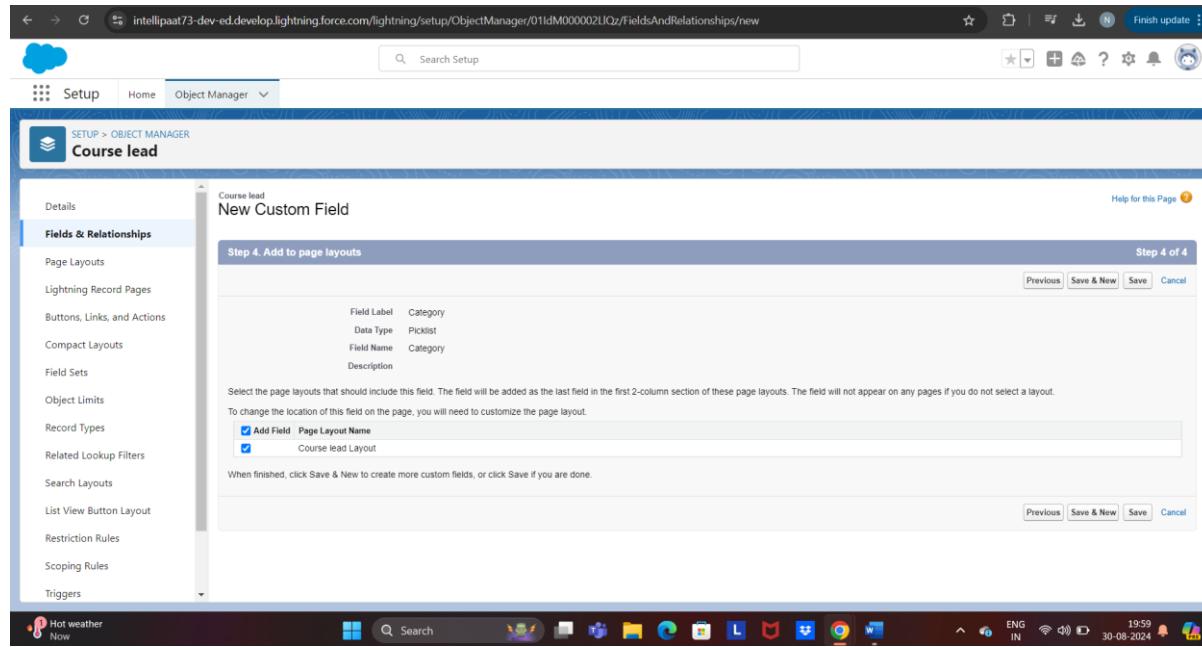
4. Email



5. Source



6. Category



7. Rating

Course lead
New Custom Field

Step 4. Add to page layouts

Field Label	Rating
Data Type	Picklist
Field Name	Rating
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Course lead Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

8. Currency

Course lead
New Custom Field

Step 4. Add to page layouts

Field Label	Currency
Data Type	Currency
Field Name	Currency
Description	

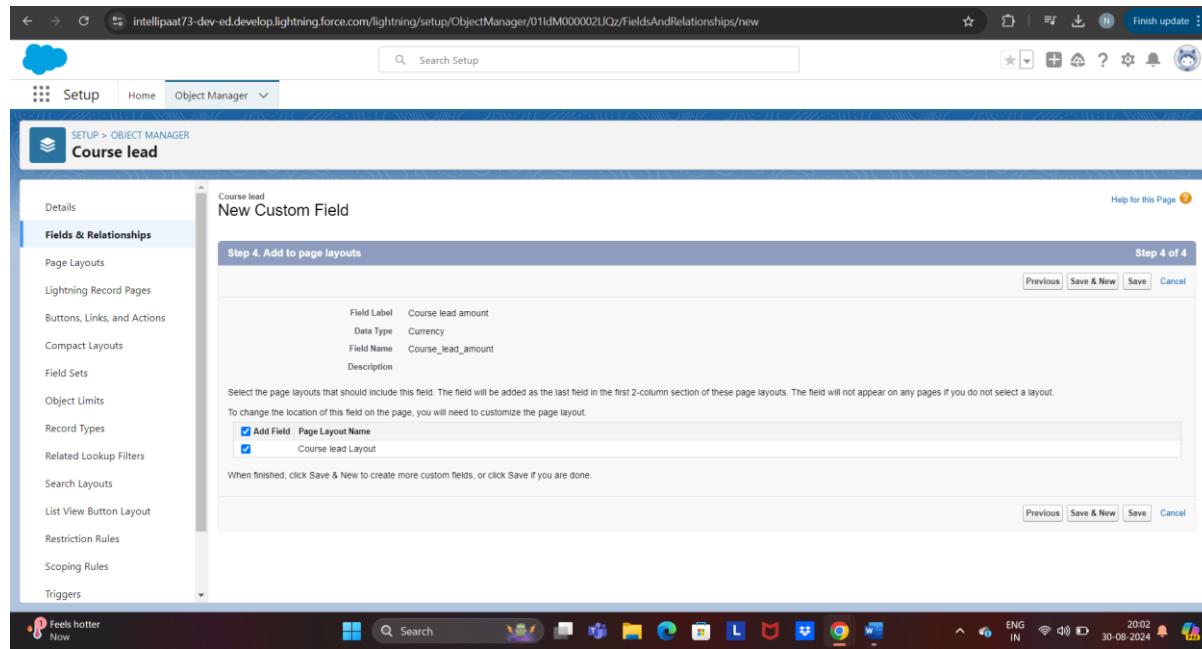
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Course lead Layout

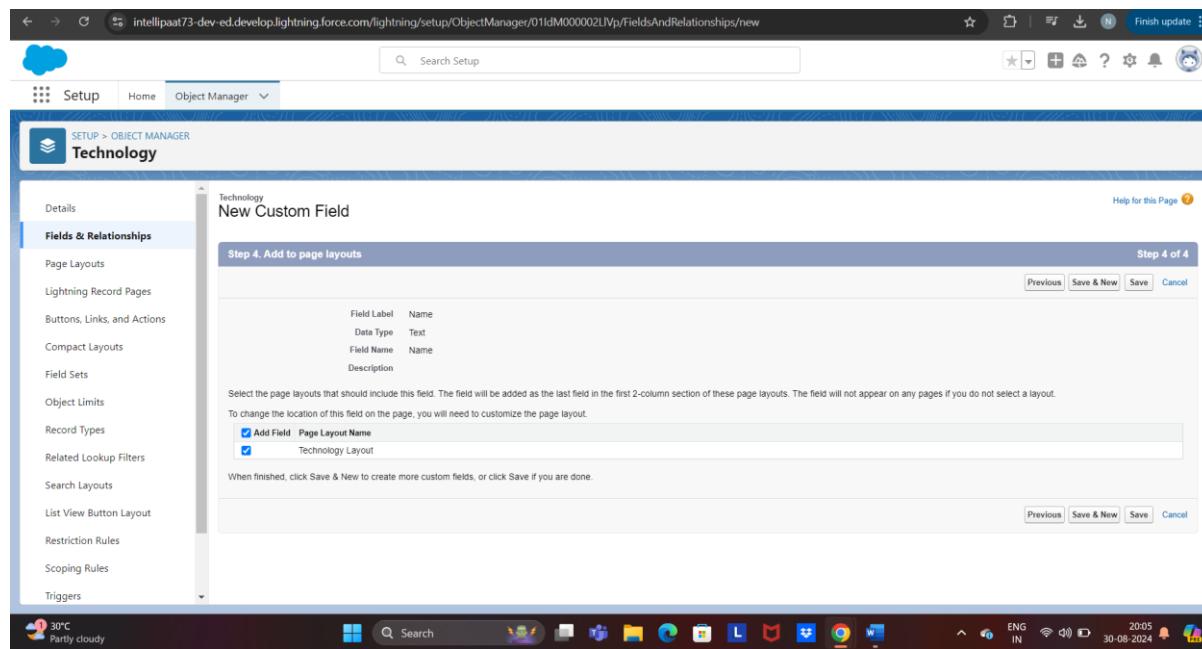
When finished, click Save & New to create more custom fields, or click Save if you are done.

9. Course lead amount

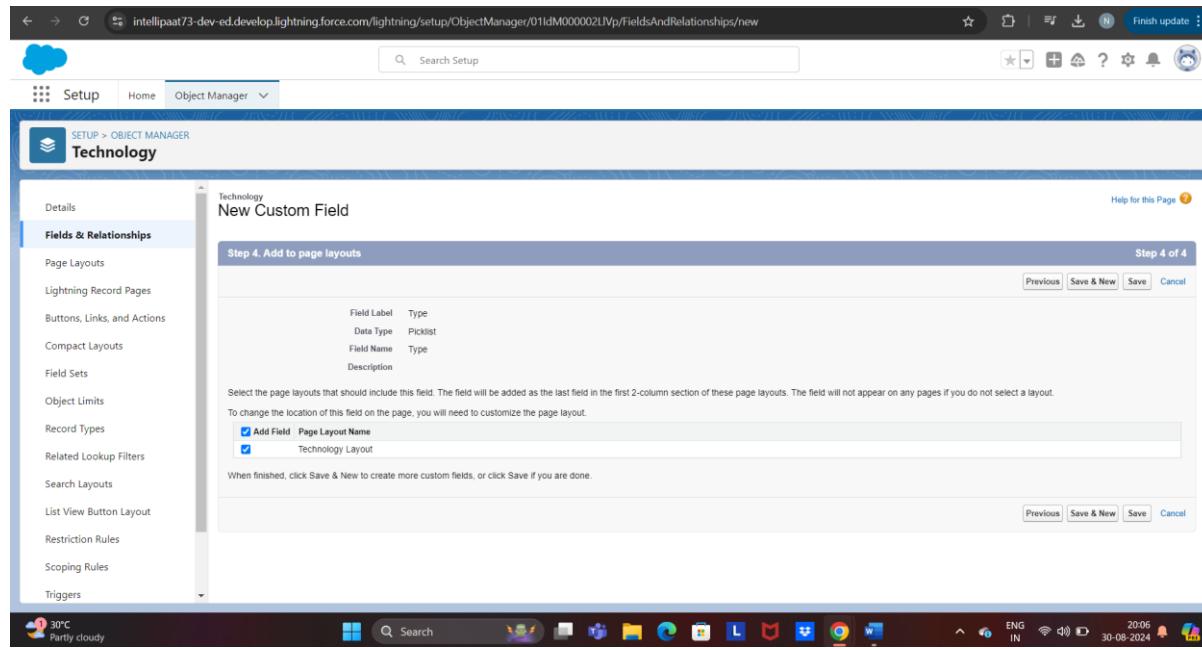


D. Technology fields

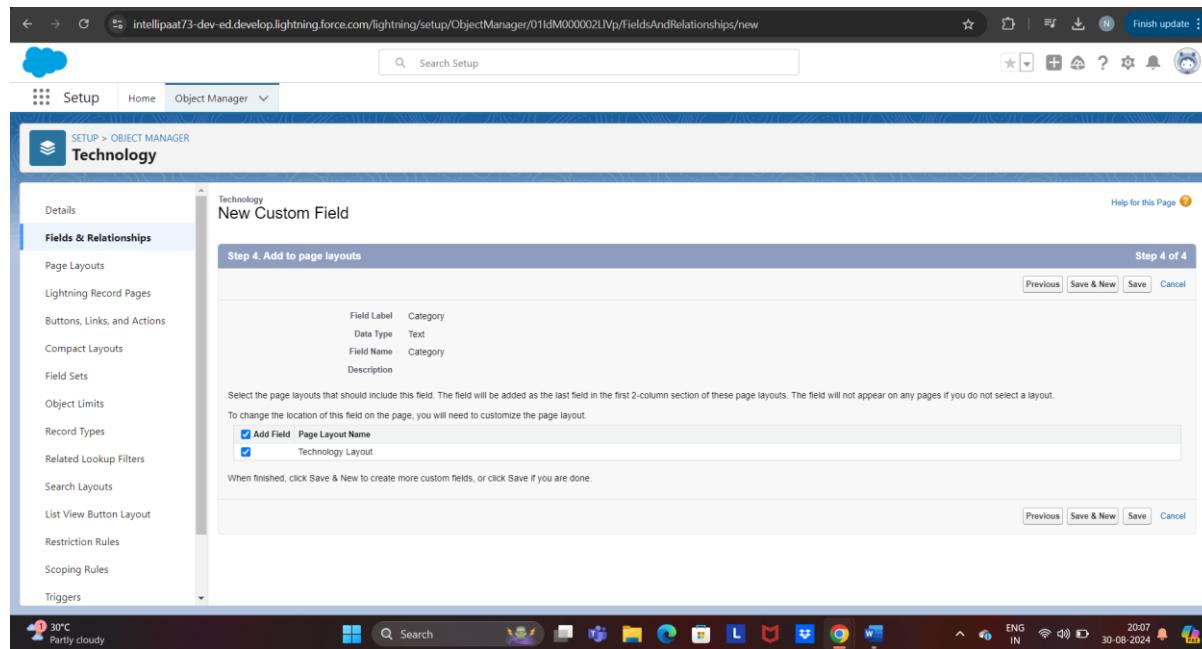
1. Name



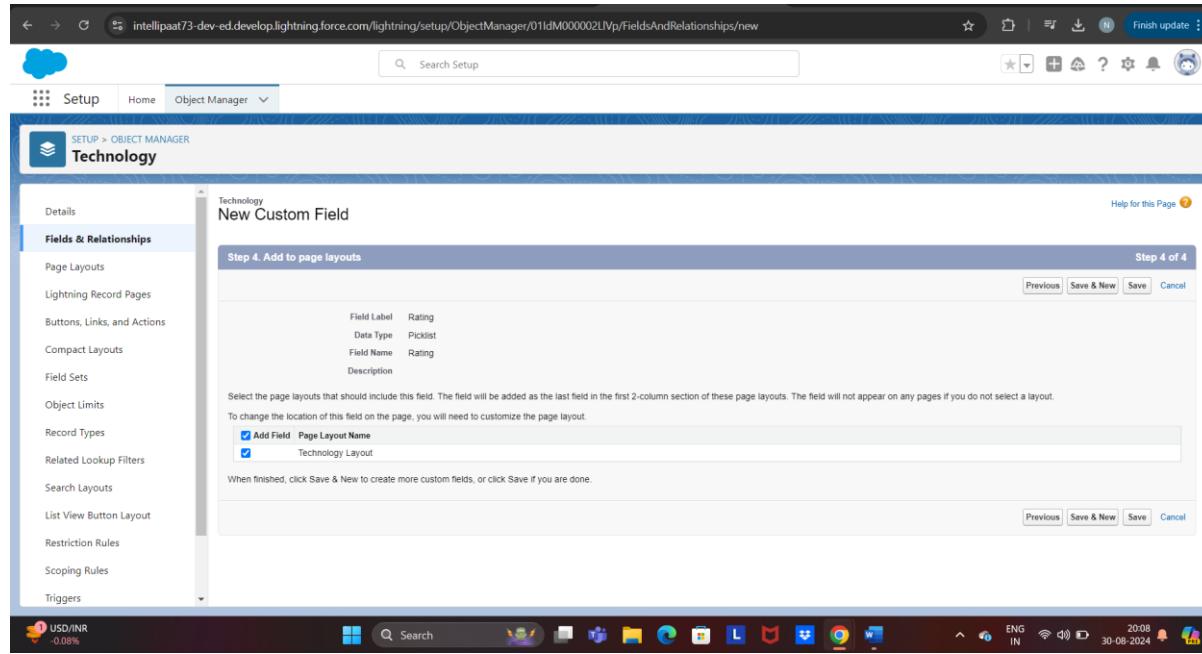
2. Type



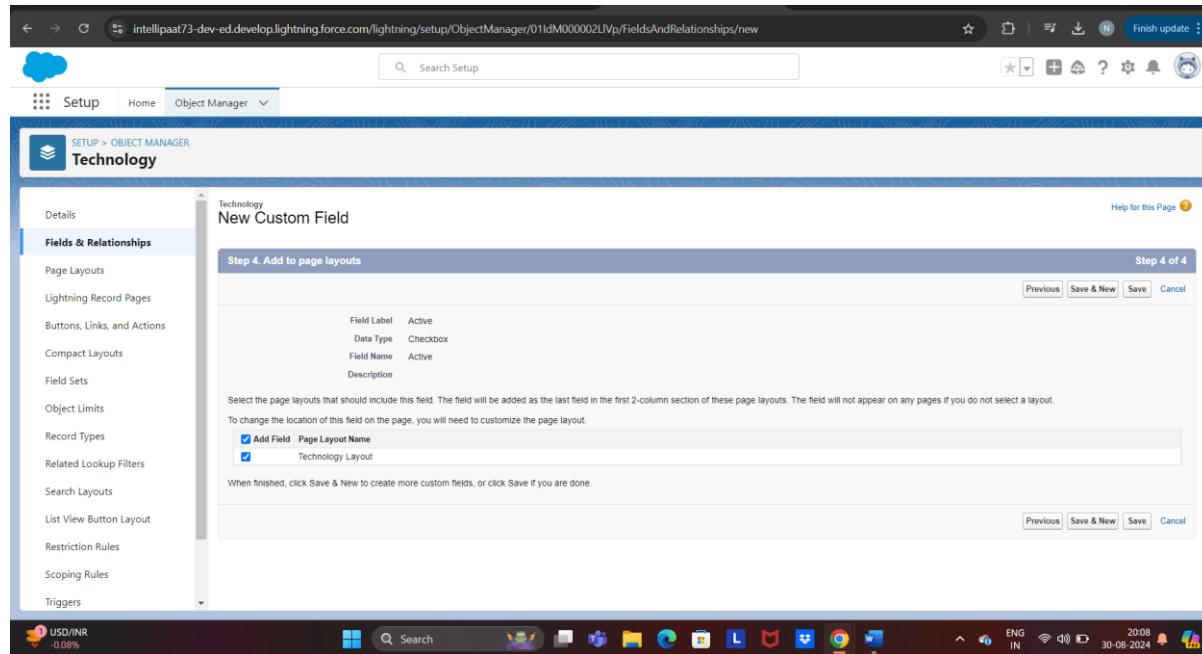
3. Category



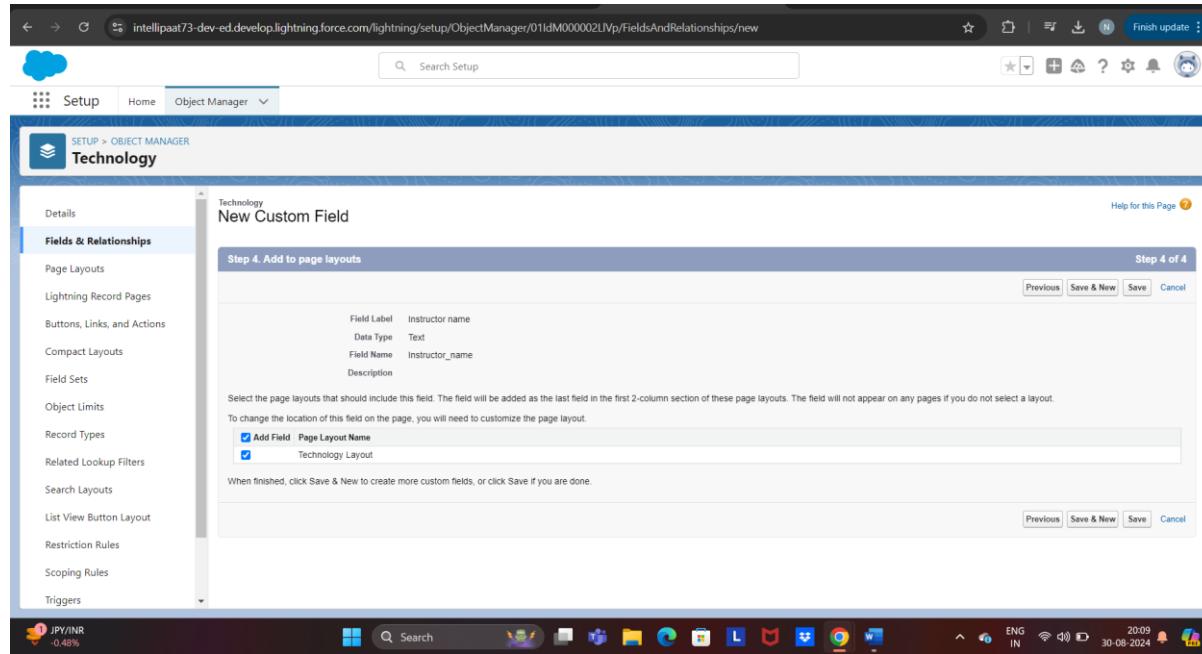
4. Rating



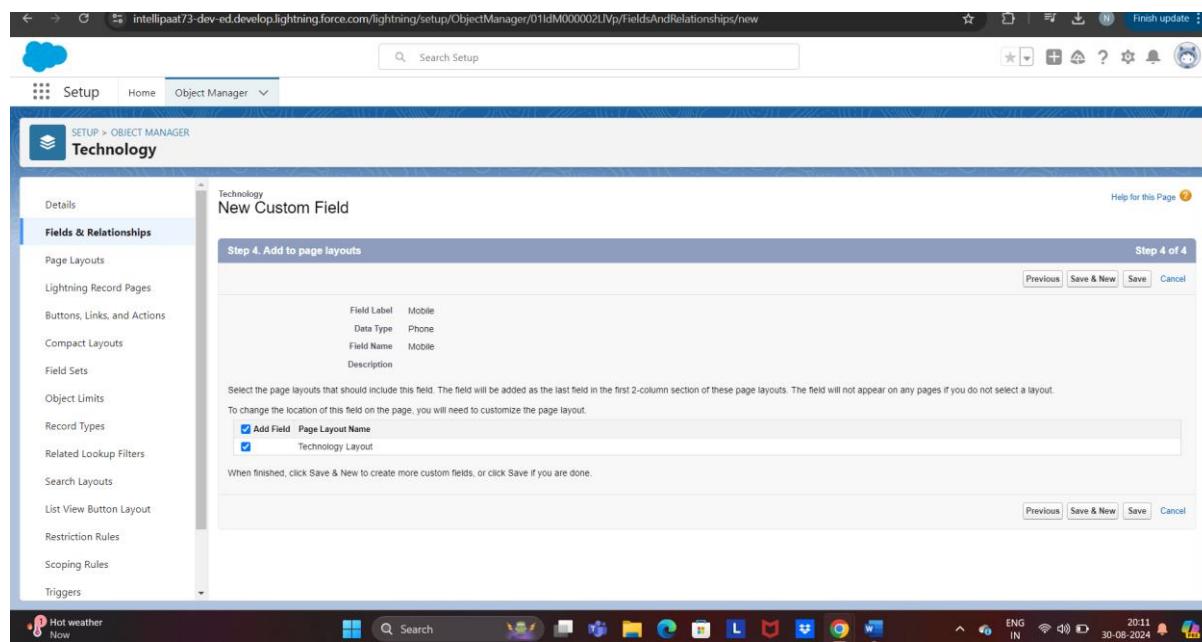
5. Active



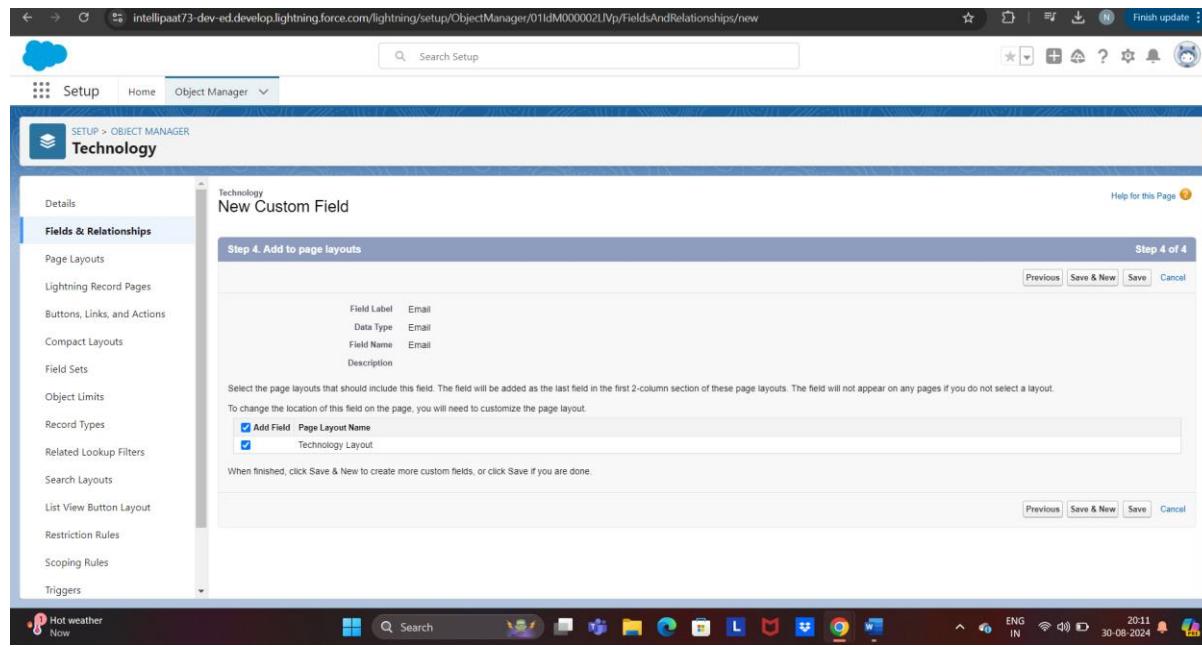
6. Instructor name



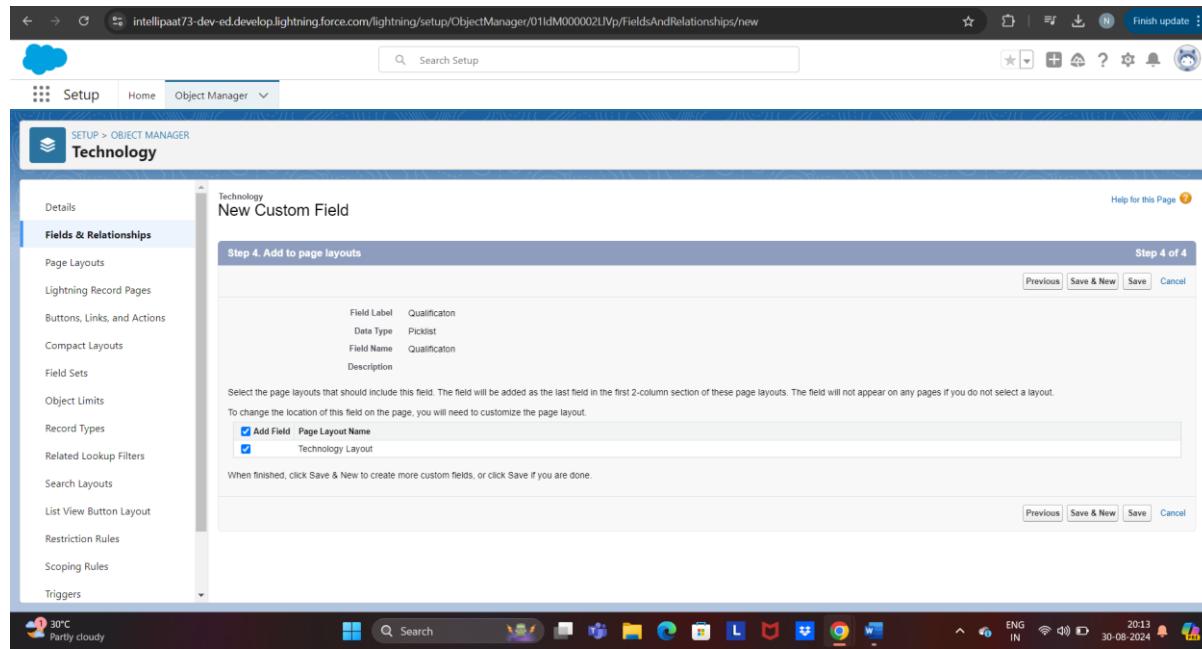
7. Mobile



8. Email



9. Qualification



10. Availability

Technology
New Custom Field
Step 4 of 4

Field Label	Availability
A	Picklist

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Technology Layout

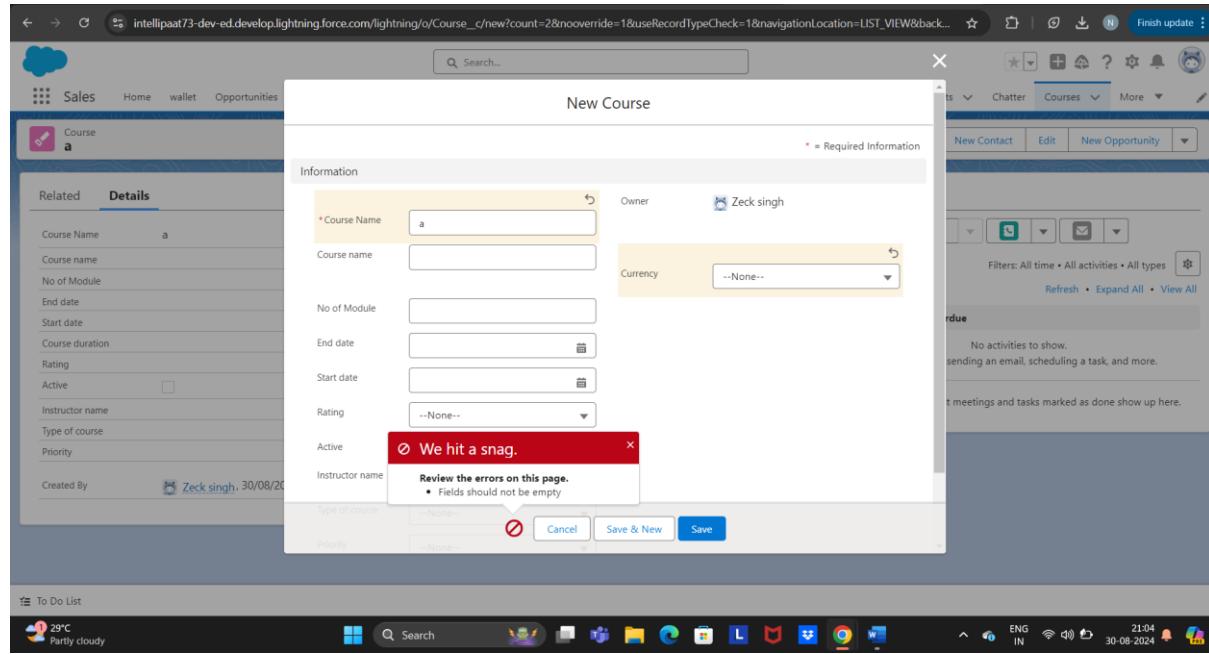
When finished, click Save & New to create more custom fields, or click Save if you are done.

Add Validation Rules-

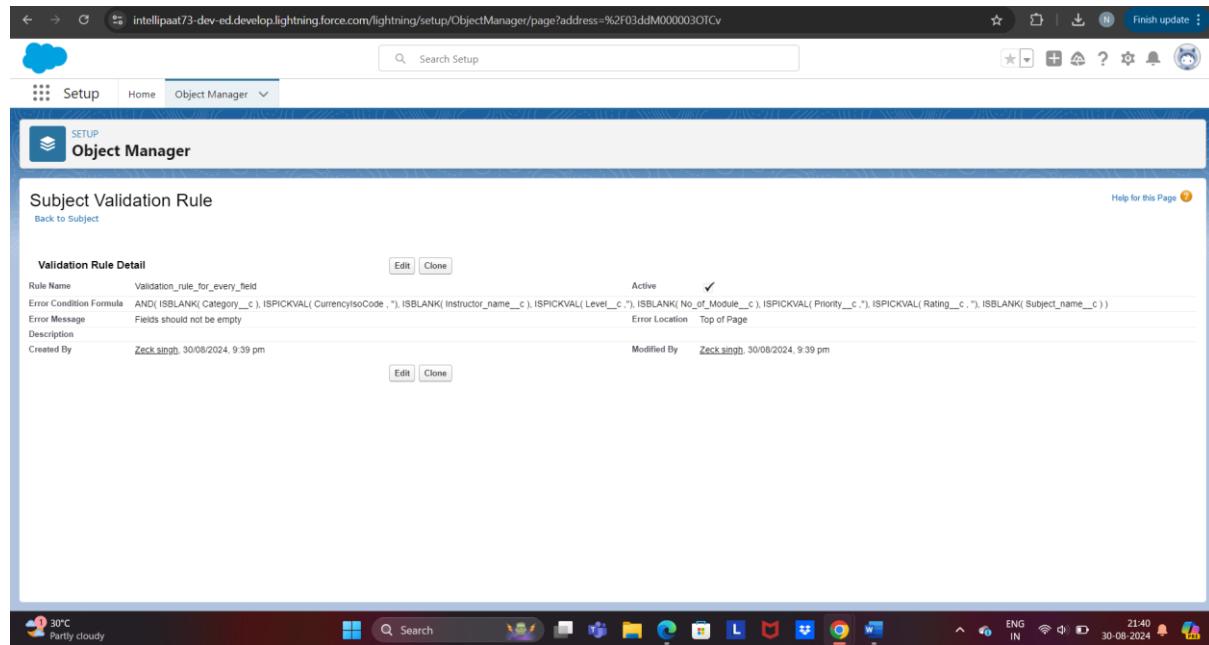
A. Course

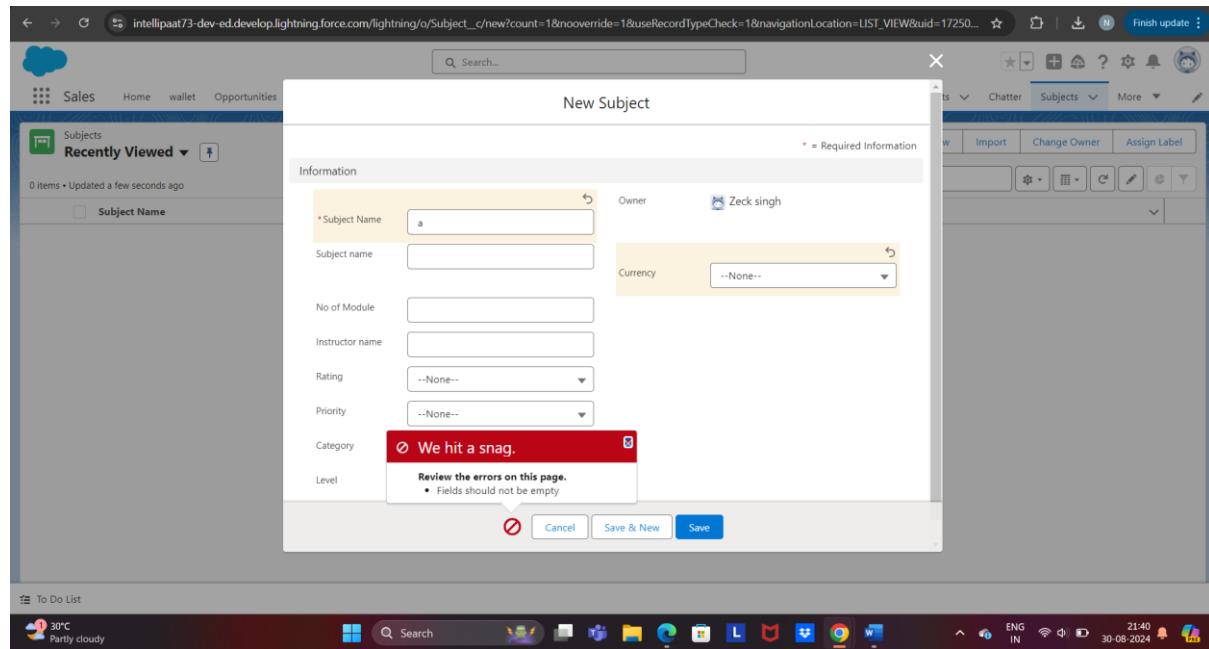
Course
Course Validation Rule
Validation Rule Detail

Rule Name	Validation_rule_for_every_field	Active
Error Condition Formula	AND(Active__c = FALSE, ISBLANK(Instructor_name__c), ISBLANK(Course_name__c), ISBLANK(Course_duration__c), ISPICKVAL(CurrencyIsoCode, ''), ISBLANK(No_of_Module__c), ISPICKVAL(Priority__c, ''))	<input checked="" type="checkbox"/>
Error Message	Fields should not be empty	Error Location Top of Page
Description		Created By Zeck singh, 30/06/2024, 8:20 pm
Created By	Zeck singh	Modified By Zeck singh, 30/06/2024, 9:03 pm

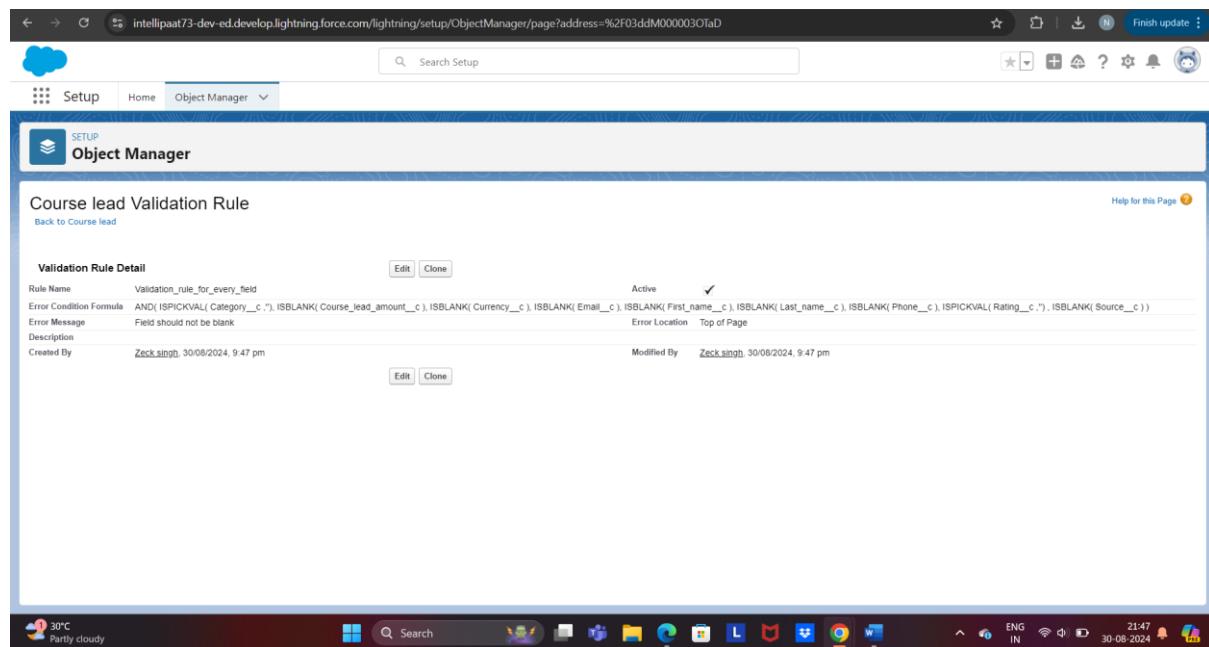


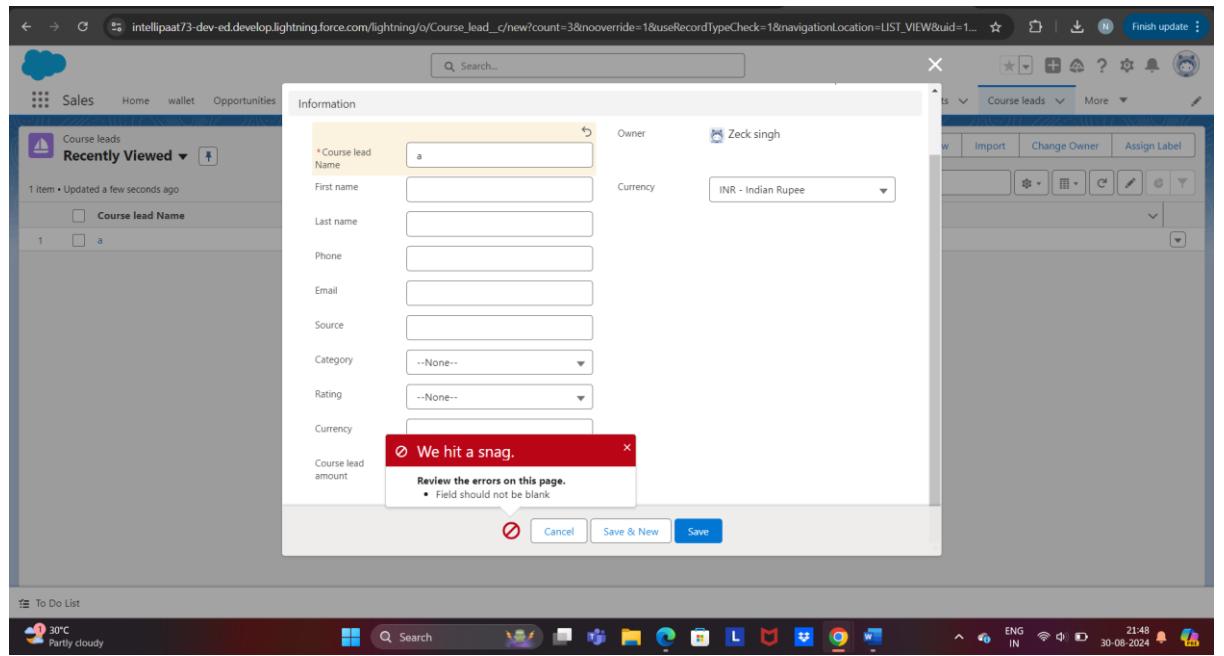
B. Subjects



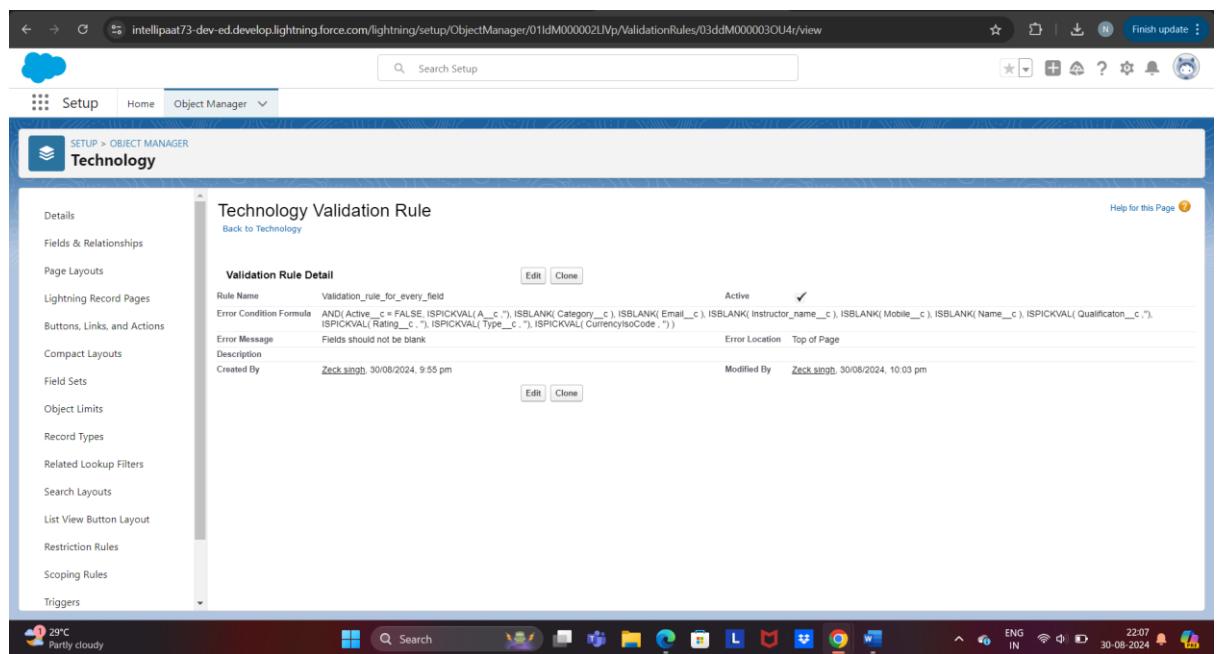


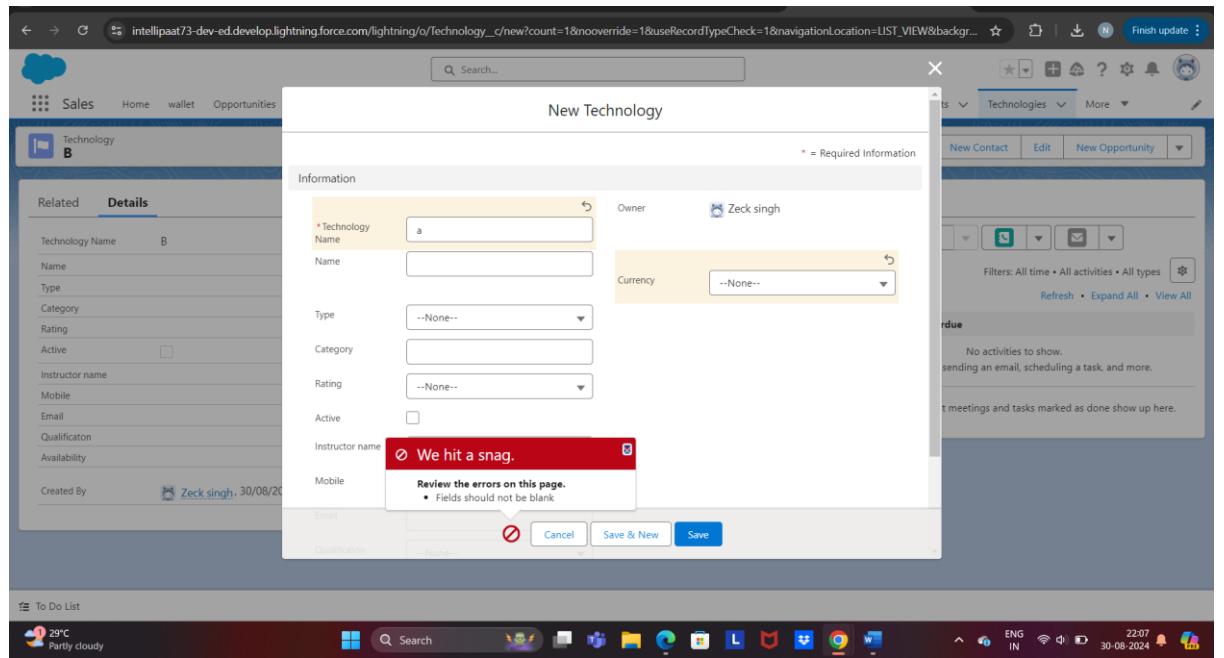
C. Course lead



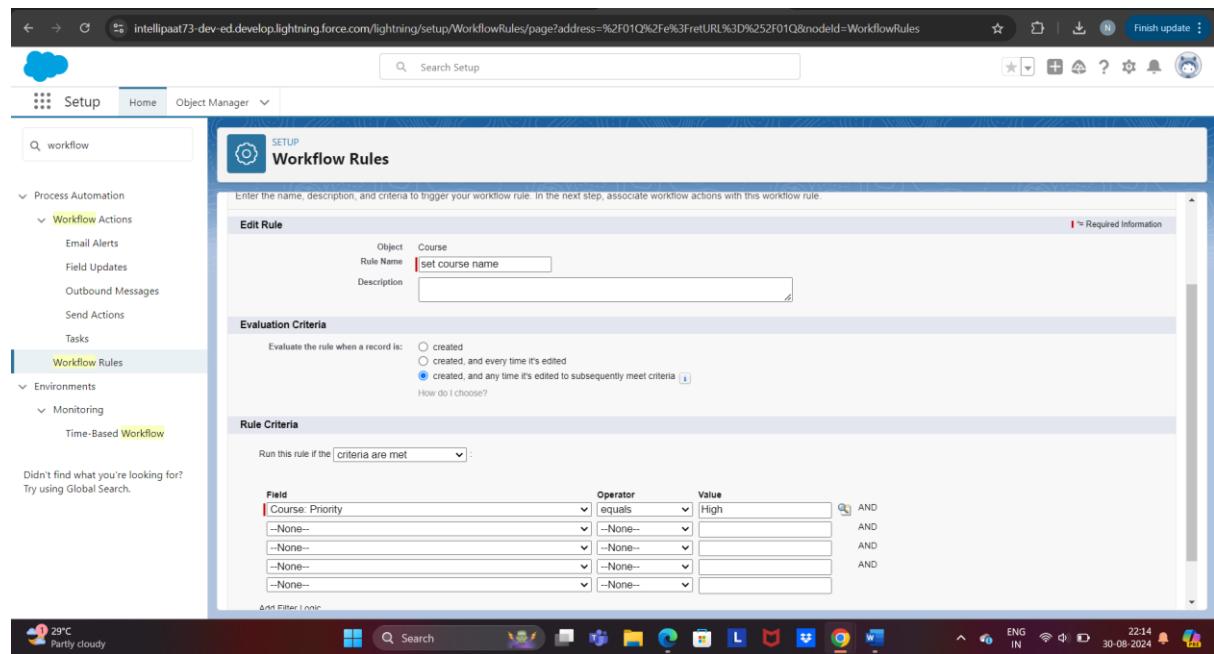


D. Technology





If the priority of course is high, then update the course name to 'High Priority'+ Course Name.



The screenshot shows the Salesforce Setup interface with the URL intellipaat73-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowRules/page?address=%2Fui%2Fcore%2Fworkflow%2FWorkflowActionEditUI%3FruleId%3D01Qd.... The left sidebar is expanded, showing categories like Process Automation, Workflow Actions, Email Alerts, Field Updates, Outbound Messages, Send Actions, Tasks, Workflow Rules (which is selected), Environments, Monitoring, and Time-Based Workflow. A search bar at the top right says "Search Setup". The main content area is titled "Workflow Rules" and "Edit Rule set course name". It's Step 3 of 3, titled "Specify Workflow Actions". It shows a rule criteria: "Rule Criteria Course: Priority EQUALS high" and "Evaluation Criteria Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria". Under "Immediate Workflow Actions", there is a note: "No workflow actions have been added." and a button "Add Workflow Action". Under "Time-Dependent Workflow Actions", there is a note: "No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined." and a button "Add Time Trigger". A "Done" button is located in the top right corner of the main content area.

The screenshot shows the Salesforce Setup interface with the URL intellipaat73-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowFieldUpdates/page?address=%2F04YdM000004czrR%2Fe%3Fpx2%3D01QdM000001fsb%26tbl.... The left sidebar is expanded, showing categories like Process Automation, Workflow Actions, Field Updates (which is selected), Email Alerts, Outbound Messages, Send Actions, Tasks, Workflow Rules, Environments, Monitoring, and Time-Based Workflow. A search bar at the top right says "Search Setup". The main content area is titled "Field Updates" and "Edit Rule set course name". It shows a configuration for a field update on the "Course" object. The "Field to Update" is "Course: Course name", "Field Data Type" is "Text", and "Re-evaluate Workflow Rules after Field Change" is checked. Below this, the "Specify New Field Value" section is open, showing a formula editor. The formula is: "High Priority" & COURSE__NAME__C. The formula value text area has "High Priority" and "COURSE__NAME__C" highlighted in red. A dropdown menu "Functions" is open, listing various functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. Buttons for "Save", "Save & New", and "Cancel" are at the bottom of the formula editor.

intellipaat73-dev-ed.lightning.force.com/lightning/setup/WorkflowRules/page?address=%2F01QdM000001efsb&nodeId=WorkflowRules

Setup Home Object Manager

Workflow Rules

Workflow Rule Detail

Rule Name	set course name	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	Zeck singh, 30/08/2024, 10:14 pm	Modified By	Zeck singh, 30/08/2024, 10:19 pm

Workflow Actions

Immediate Workflow Actions

Type Field Update Description Course_name_update

Time-Dependent Workflow Actions See an example

⚠ You cannot add new time triggers to an active rule. Deactivate This Rule

29°C Partly cloudy

Search

22:19 30-08-2024 ENG IN

Related Details

Course Name	f	Owner	Zeck singh
Course name	High PrioritySalesforce	Currency	INR - Indian Rupee
No of Module			
End date			
Start date			
Course duration			
Rating			
Active	<input type="checkbox"/>		
Instructor name			
Type of course			
Priority	High		
Created By	Zeck singh, 30/08/2024, 10:20 pm	Last Modified By	Zeck singh, 30/08/2024, 10:20 pm

Activity

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.

29°C Partly cloudy

Search

22:20 30-08-2024 ENG IN

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

Edit Rule

Object: Course lead
Rule Name: Course lead rule
Description:

Evaluation Criteria

Evaluate the rule when a record is:
 created
 created, and every time it's edited
 created, and any time it's edited to subsequently meet criteria [?](#)

How do I choose?

Rule Criteria

Run this rule if the [criteria are met](#):

Field	Operator	Value	AND
Course lead: Currency	greater than	1000	AND
—None—	—None—	—None—	AND
—None—	—None—	—None—	AND
—None—	—None—	—None—	
—None—	—None—	—None—	

Add Filter Logic

Field Updates

Object: Course lead
Field to Update: Course lead Name
Field Data Type: Text
Re-evaluate Workflow Rules after Field Change:

Specify New Field Value

Text Options

Use a formula to set the new value [Hide Formula Editor](#)

Insert Field [Insert Operator](#)

Formula Value (Text) =
""Top Priority Customer"" & Name

Functions

— All Function Categories —
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
[Insert Selected Function](#)

Check Syntax: No syntax errors in merge fields or functions.
Use formula syntax. Enclose text and picking value API names in double quotes. (`!The__Name!`), include numbers without quotes (`20`), show percentages as decimals (`0.10`), and express date calculations in the standard format: (`Today() + 7`)

Save Save & New Cancel

Salesforce Setup Page - Workflow Rules

Workflow Rule Detail

Course lead rule

Object: Course lead
Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Workflow Actions

Immediate Workflow Actions

Type: Field Update, Description: Field update

Time-Dependent Workflow Actions

See an example

Warning: You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

Created By: Zeck singh, 30/08/2024, 10:23 pm Modified By: Zeck singh, 30/08/2024, 10:25 pm

Help for this Page

Did you find what you're looking for? Try using Global Search.

Cloud icon: 29°C Partly cloudy

System bar: ENG IN 22:25 30-08-2024

Salesforce Lightning Page - Course lead

Top Priority CustomerSalesforce

Details

Course lead Name	Top Priority CustomerSalesforce	Owner	Zeck singh
First name		Currency	INR - Indian Rupee
Last name			
Phone			
Email			
Source			
Category			
Rating			
Currency			
Course lead amount	INR 1,001.00		
Created By	Zeck singh, 30/08/2024, 10:27 pm	Last Modified By	Zeck singh, 30/08/2024, 10:27 pm

Activity

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.

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

Cloud icon: 28°C Partly cloudy

System bar: ENG IN 22:27 30-08-2024

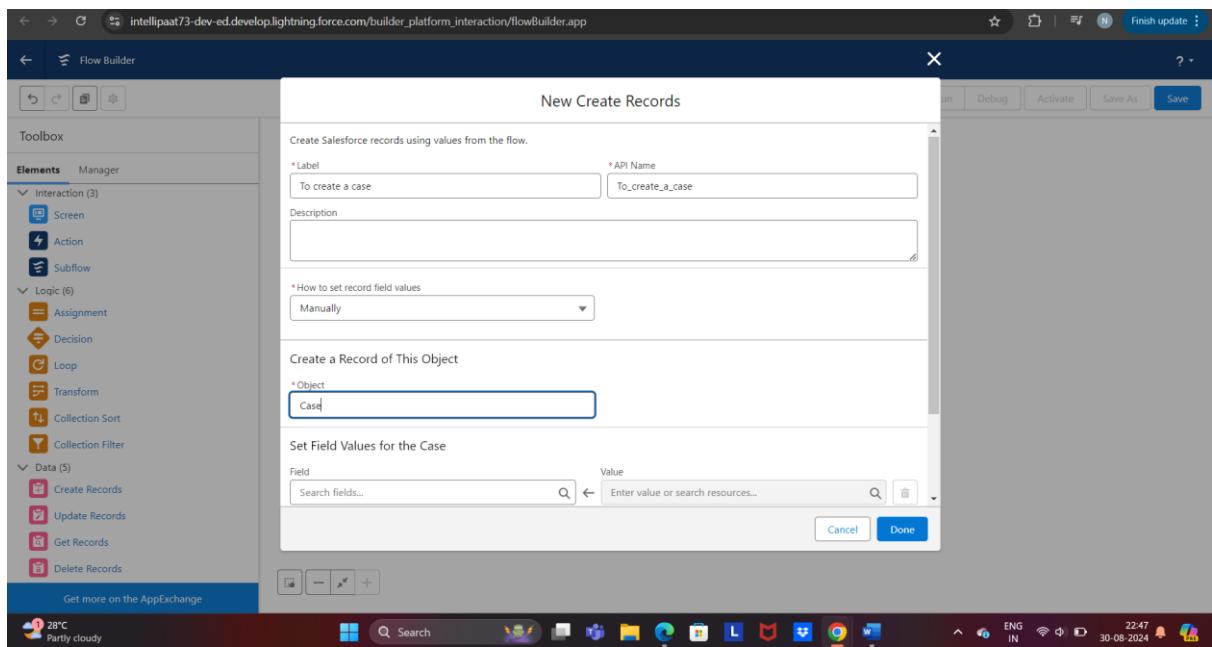
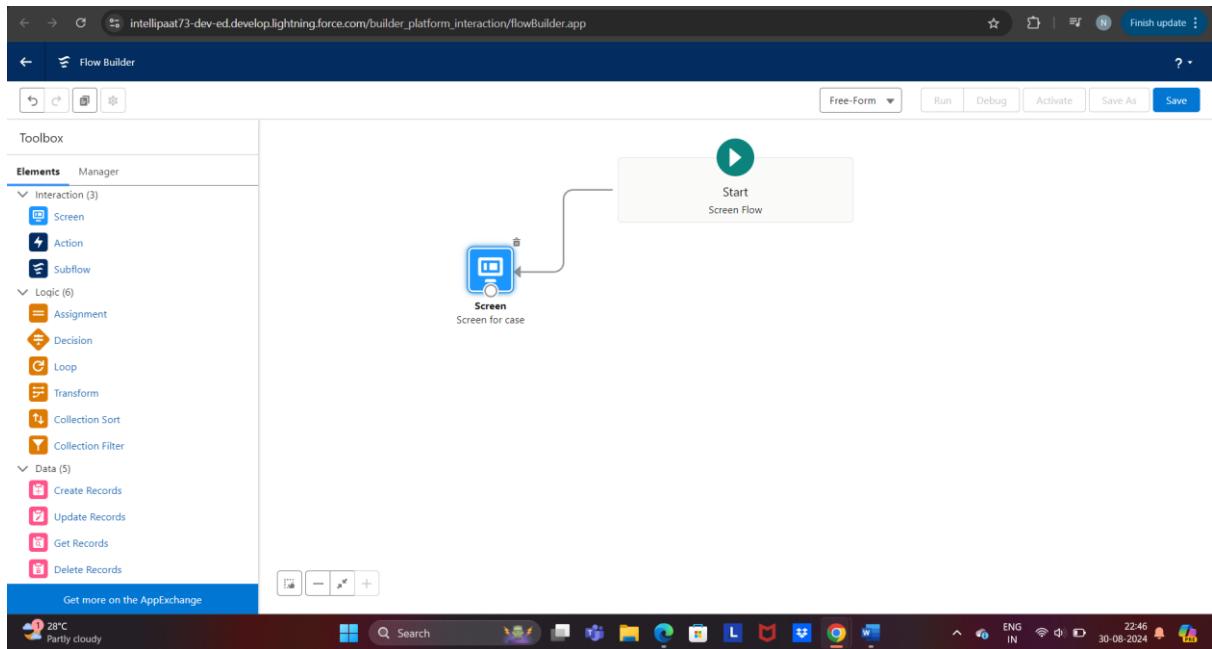
Create a flow using the below scenario for creating a Case.

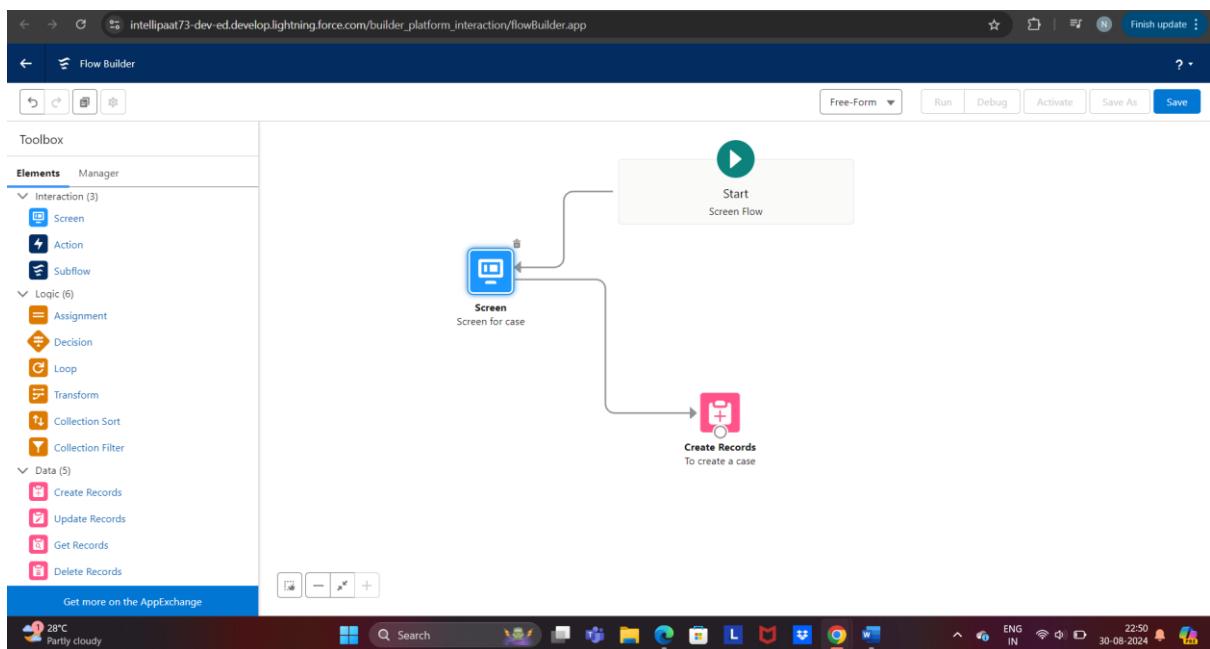
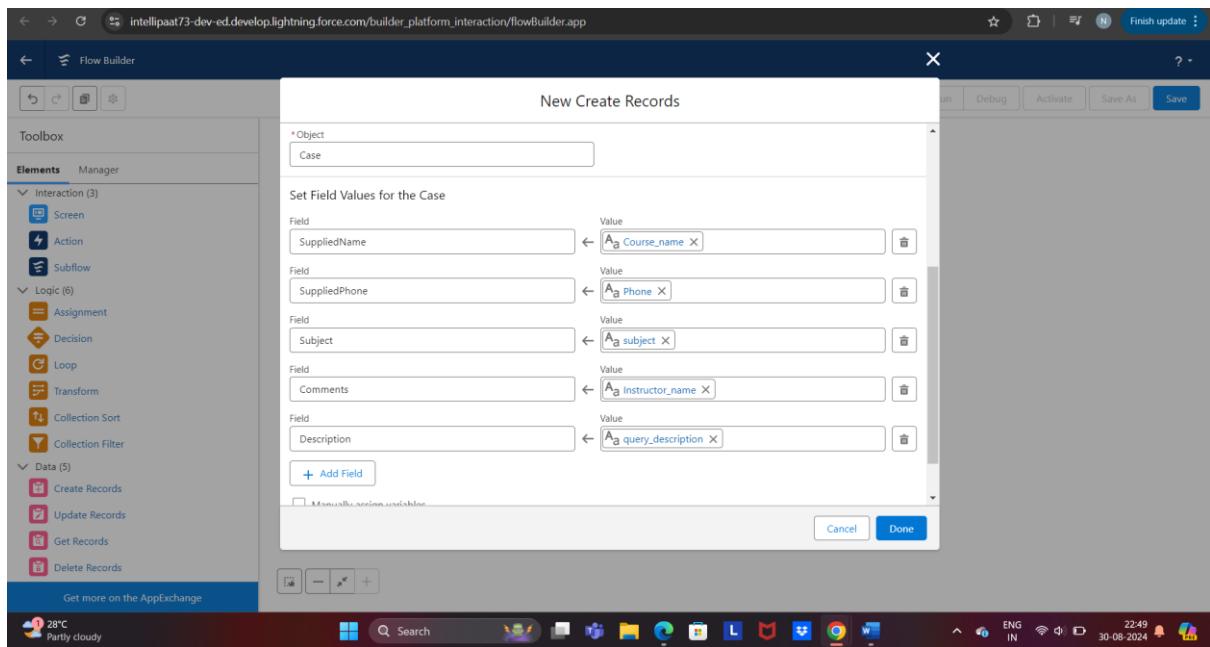
a. First, the user should enter the following fields in the case:

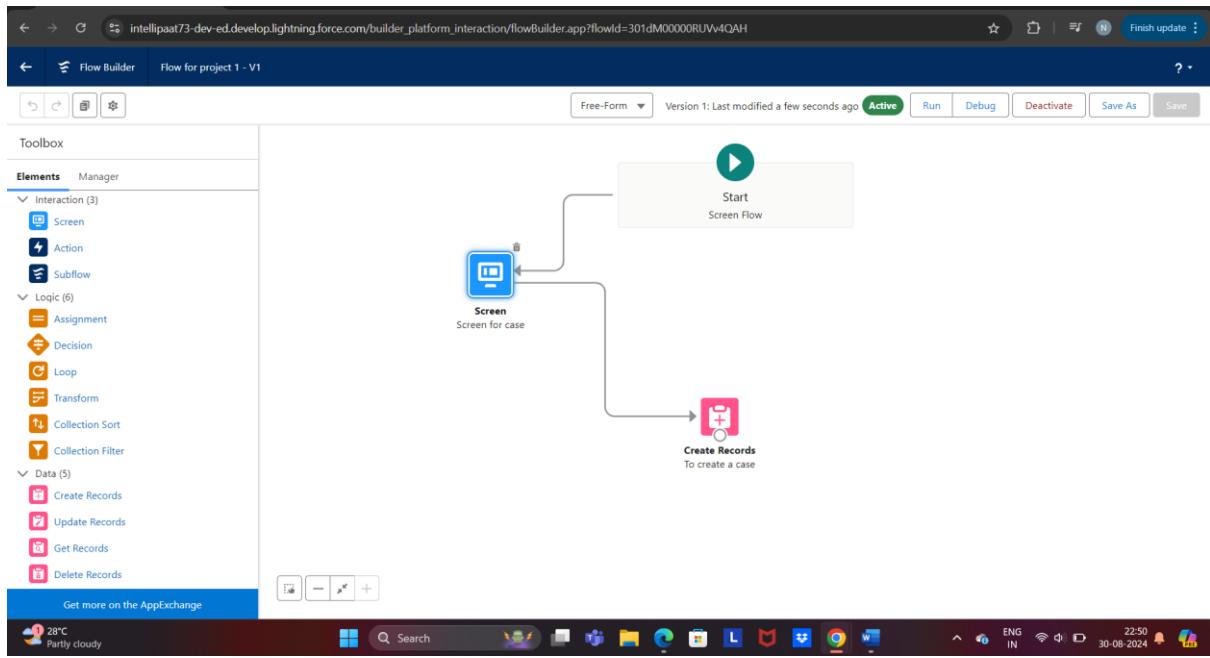
- Name • Phone • Email • Course Enrolled • Subject • Instructor Name • Query Description

The screenshot shows the 'Flow Builder' interface with the 'Select Type' screen open. The 'Recommended' section is highlighted, showing the 'Screen Flow' option, which is described as guiding users through a business process launched from Lightning pages. Other recommended types include Record-Triggered Flow, Platform Event-Triggered Flow, and Autolaunched Flow (No Trigger). Below this, under 'All Flow Types', there are two more options: Autolaunched Flow (No Trigger) and Autolaunched Orchestration (No Trigger). A 'Create' button is visible at the bottom right of the list.

The screenshot shows the 'Edit Screen' interface within the Flow Builder. On the left, the 'Toolbox' is open, showing the 'Components' tab selected. In the center, there is a form with several input fields: 'Email', 'query description', 'Instructor name', 'Course enrolled', and 'subject'. To the right, the 'Screen Properties' panel is open, showing the 'Label' field set to 'Screen for case', the 'API Name' field set to 'Screen_fo_rcase', and a 'Description' field. At the bottom right of the properties panel are 'Cancel' and 'Done' buttons.







Flow for project 1

Email srujanit785@gmail.com

query description issue

Instructor name Twinkle

Course enrolled Salesforce

subject Issue

Phone 98243335353

Course name Salesforce

Next

28°C Partly cloudy

22:51 30-08-2024 ENG IN

intellipaat73-dev-ed.lightning.force.com/lightning/o/Case/list?filterName=_Recent

Sales Home wallet Opportunities Quotes Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Cases More

Cases Recently Viewed

3 items • Updated a few seconds ago

	Case Number	Subject	Status	Date/Time Opened	Case Owner Alias
1	00001029	Issue	New	30/08/2024, 10:51 pm	Nsing
2	00001028		New	28/08/2024, 4:23 pm	integ
3	00001026		New	28/08/2024, 4:00 pm	Nsing

To Do List

28°C Partly cloudy

Search

ENG IN 22:52 30-08-2024

intellipaat73-dev-ed.lightning.force.com/lightning/r/Case/500dM00000Mko9QAB/view

Sales Home wallet Opportunities Quotes Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Cases More

Case Issue

Priority Medium Status New Case Number 00001029

Feed Related

Post Poll Share an update... Share

Most Recent Activity ▾

All Updates Call Logs Text Posts Status Changes

Zeck singh To: Internal Twinkle Comment

Zeck singh Case created

Details

Case Owner	Case Number	Status
Zeck singh	00001029	New
Contact Name	Contact Phone	Priority
		Medium
Account Name	Contact Email	Case Reason
Type	Case Origin	Case Currency
		INR - Indian Rupee
Web Email	Web Company	Web Name
		982433353535

To Do List

28°C Partly cloudy

Search

ENG IN 22:53 30-08-2024

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'.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing sections like Feature Settings, Service, Environments, and Offline. Under Service, the Case Assignment Rules section is selected. The main content area displays a Case Assignment Rule named "Case assignment rule 3". The rule detail table includes columns for Rule Name (Case assignment rule 3), Created By (Zack singh), Modified By (Zack singh), and Active (checked). Below this is a section for Rule Entries, which currently has no entries specified.

The screenshot shows the "Enter the rule entry" screen for creating a new rule. The process is divided into four steps:

- Step 1: Set the order in which this rule entry will be processed**: Shows a Sort Order field with the value "1".
- Step 2: Select the criteria for this rule entry**: Shows a table for defining filter logic. The first row defines a condition: "Case: Status equals New". This is followed by four rows of "None" values, each with an AND operator. Below this is a "Add Filter Logic" button.
- Step 3: Select the user or queue to assign the case to**: Shows a Queue dropdown set to "queues", an Email Template field, and a "Do Not Reassign Owner" checkbox.
- Step 4: Optionally, select predefined case teams to add to the case**: Shows a Predefined Case Teams dropdown.

intellipaat73-dev-ed.lightning.force.com/lightning/setup/null/page?address=%2Fsetup%2Fown%2Fentityruledetail.jsp%3Fid%3D01QdM000001eUY%26type...

Setup Home Service Setup Assistant Commerce Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer Sales Cloud Everywhere ADMINISTRATION > Users > Data > Email PLATFORM TOOLS > Subscription Management

28°C Partly cloudy

Search Setup

Case Assignment Rule Case assignment rule 3

Add rule entries that specify the criteria used to route cases. You can reorder rule entries on this page after you create them.

Rule Detail

Rule Name	Case assignment rule 3	Active	<input checked="" type="checkbox"/>
Created By	Zeck singh, 30/08/2024, 10:56 pm	Modified By	Zeck singh, 30/08/2024, 11:09 pm

Rule Entries

Action	Order	Criteria	Assign To	Email
Edit Del	1	Case: Status EQUALS New	RULES	<input type="checkbox"/>

Help for this Page

23:09 ENG IN 30-08-2024

intellipaat73-dev-ed.lightning.force.com/lightning/setup/WorkflowRules/page?address=%2Fui%2Fcore%2Fworkflow%2FWorkflowActionEditUI%3FruleId%3D...

Workflow Rules

Process Automation Workflow Actions Email Alerts Field Updates Outbound Messages Send Actions Tasks Workflow Rules User Interface Translation Workbench Export Import Translate Translation Language Settings Environments Monitoring Time-Based Workflow Security

28°C Partly cloudy

Search Setup

Edit Rule Case resolved

Step 3: Specify Workflow Actions Step 3 of 3

Specify the workflow actions that will be triggered when the rule criteria are met. See an example

Rule Criteria: Case: Closed EQUALS True
Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions: No workflow actions have been added. Add Workflow Action

Time-Dependent Workflow Actions: No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined. Add Time Trigger

Help for this Page

23:11 ENG IN 30-08-2024

Screenshot of the Salesforce Setup interface showing the creation of an Email Alert.

Email Alert Details:

- Description: Case is closed so updating case as 'Resolved'
- Unique Name: Case_is_closed_so_updateit
- Object: Case
- Email Template: Support: Case Response
- Protected Component: (None)
- Recipient Type: User
- Recipients:
 - Available Recipients: User: Integration User, User: Sam singh, User: Security User
 - Selected Recipients: User: Zeck singh

Buttons: Save, Save & New, Cancel

Page Header: Email Alerts

Left Navigation: Process Automation, Workflow Actions, Email Alerts, Field Updates, Outbound Messages, Send Actions, Tasks, Workflow Rules, User Interface, Translation Workbench, Environments, Monitoring, Time-Based Workflow, Security.

Screenshot of the Salesforce Setup interface showing the creation of a Workflow Rule.

Workflow Rule Details:

- Rule Name: Case resolved
- Active: ✓
- Description: Case: Closed EQUALS True
- Created By: Zeck singh, 30/08/2024, 11:11 pm
- Modified By: Zeck singh, 30/08/2024, 11:13 pm
- Object: Case
- Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Workflow Actions:

- Type: Email Alert
- Description: Case is closed so updating case as 'Resolved'

Time-Dependent Workflow Actions: See an example

Message: You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

Page Header: Workflow Rules

Left Navigation: Process Automation, Workflow Actions, Email Alerts, Field Updates, Outbound Messages, Send Actions, Tasks, Workflow Rules, User Interface, Translation Workbench, Environments, Monitoring, Time-Based Workflow, Security.