

Day 5 Assignment

Q:- Create a workflow rule on Opportunity which will be evaluated for the evaluation criteria as Created and every time its edited . In the rule criteria u need to check that if opportunity name doesn't contain account name if condition is true then u need to update the Name of the opportunity by concatenating it with account name.

The screenshot shows the Salesforce Setup page for a Workflow Rule. The browser address bar indicates the URL: `mirketa49-dev-ed.lightning.force.com/lightning/setup/WorkflowRules/page?address=%2F01Q5i000000PXuw&nodeId=WorkflowRules`. The left sidebar shows the navigation menu with 'Workflow Rules' selected. The main content area displays the details of a Workflow Rule named 'Concatenating with account name'.

Workflow Rule Detail

Rule Name	Concatenating with account name	Object	Opportunity
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and every time it's edited
Description	Opportunity: Opportunity Name DOES NOT CONTAIN Account.Name		
Created By	Himanshu Tajne, 22/07/2022, 17:09	Modified By	Himanshu Tajne, 22/07/2022, 17:12

Workflow Actions

Immediate Workflow Actions

Type	Description
Field Update	opp.name plus acc

Time-Dependent Workflow Actions [See an example](#)

You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited". [Change Evaluation Criteria](#)

New Opportunity

Opportunity Information

Opportunity Owner: Himanshu Tajne

Amount:

Private: ☐

*Close Date: 12/07/2022

*Opportunity Name: Tajne

Next Step:

Account Name: Himanshu

*Stage: Prospecting

Type: --None--

Probability (%): 10%

Lead Source: --None--

Primary Campaign Source: Search Campaigns...

*Opportunity Currency: INR - Indian Rupee

Additional Information

Order Number:

Buttons: Cancel, Save & New, Save

Opportunity: Tajne Himanshu

Account Name: Himanshu

Close Date: 12/07/2022

Amount:

Opportunity Owner: Himanshu Tajne

Stage: Prospecting

Buttons: + Follow, New Case, New Note, Clone, Mark Stage as Complete

Details

Opportunity Owner: Himanshu Tajne

Private: ☐

Opportunity Name: Tajne Himanshu

Account Name: Himanshu

Type:

Lead Source:

Opportunity Currency: INR - Indian Rupee

Amount:

Expected Revenue:

Close Date: 12/07/2022

Next Step:

Stage: Prospecting

Probability (%): 10%

Primary Campaign Source:

Related

Products (0)

Notes & Attachments (0)

Upload Files

Or drop files

Contact Roles (0)

Partners (0)

Q :- Create a workflow on Opportunity which will be evaluated when the record is created and the value of amount is greater than 10000 then u need to update the close Date as today's date + 30 days.

Recently Viewed | Bank Accounts | Workflow Rules | Salesforce

mirketa49-dev-ed.lightning.force.com/lightning/setup/WorkflowRules/page?address=%2F01Q5i000000PXz8&unodel=WorkflowRules

Search Setup

Setup Home Object Manager

workflow

Process Automation

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

Environments

Monitoring

Time-Based Workflow

Didn't find what you're looking for? Try using Global Search.

Workflow Rules

Workflow Rule

Close date plus 30

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Workflow Rule Detail

[Edit](#) [Clone](#) [Deactivate](#)

Rule Name	Close date plus 30	Object	Opportunity
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created
Description			
Rule Criteria	Opportunity: Amount GREATER OR EQUAL "INR 10,000"		
Created By	Himanshu Tajne, 23/07/2022, 07:28	Modified By	Himanshu Tajne, 23/07/2022, 07:29

Workflow Actions

[Edit](#)

Immediate Workflow Actions

Type	Description
Field Update	Close date plus 30

Time-Dependent Workflow Actions [See an example](#)

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

New Opportunity | Salesforce | Workflow Rules | Salesforce

mirketa49-dev-ed.lightning.force.com/lightning/o/Opportunity/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW...

All Search Opportunities and more...

SBI State Bank of India Home Bank

New Opportunity

Opportunity Information

Opportunity Owner	Amount
Himanshu Tajne	10,000.00
Private	*Close Date
<input type="checkbox"/>	06/07/2022
*Opportunity Name	Next Step
Himanshu	
Account Name	*Stage
Himanshu	Prospecting
Type	Probability (%)
--None--	10%
Lead Source	Primary Campaign Source
--None--	Search Campaigns...
*Opportunity Currency	
INR - Indian Rupee	

Additional Information

Order Number

[Cancel](#) [Save & New](#) [Save](#)

Workflow Rules | Salesforce

mirketa49-dev-ed.lightning.force.com/lightning/r/Opportunity/0065i000005JYuVAAW/view

SBI State Bank of India

Opportunity Himanshu

Prospecting Qualification Needs Analysis Value Proposition Id. Decision Mak... Perception Analy... Proposal/Price Q... Negotiation/Revi... Closed

Activity Details Chatter

Opportunity Owner: Himanshu Tajne

Amount: INR 10,000.00

Expected Revenue: INR 1,000.00

Close Date: 05/08/2022

Next Step

Stage: Prospecting

Probability (%): 10%

Primary Campaign Source

Expected Revenue Amount: 10000

Order Number

Main Competitor(s)

Related

Products (0)

Notes & Attachments (0)

Upload Files

Or drop files

Contact Roles (0)

Partners (0)

Stage History (2)

Q :- Write a workflow rule on Contract object to create a Follow Up task for the manager before the 2 days of the contract end date if contract status is status

New Contract | Salesforce

Workflow Rules | Salesforce

mirketa49-dev-ed.lightning.force.com/lightning/setup/WorkflowRules/page?address=%2F01Q5i000000PXz1&nodeId=WorkflowRules

Setup

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Apps

Feature Settings

Slack

Einstein

Objects and Fields

Workflow Rules

create task for contract

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Workflow Rule Detail

Rule Name: create task for contract

Active: ☐

Description

Rule Criteria: Contract: Status EQUALS Activated

Created By: Himanshu Tajne, 23/07/2022, 07:34

Modified By: Himanshu Tajne, 23/07/2022, 07:42

Object: Contract

Evaluation Criteria: Evaluate the rule when a record is created

Workflow Actions

Immediate Workflow Actions

Type: Task

Description: Followup task

Time-Dependent Workflow Actions

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

Q 1:-

1. Create a workflow rule to send an welcome email as soon as an employee record gets created and also update the field Job Status as Probation

The screenshot shows the Salesforce Setup page for Workflow Rules. The left sidebar contains navigation links: Setup, Home, Object Manager, 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, and Network Access. The main content area is titled 'Workflow Rules' and shows details for a rule named 'Welcome email'. The rule is active and its object is 'Employee'. The evaluation criteria are 'Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria'. The rule criteria are 'Employee: Job Status EQUALS Probation'. The rule was created by Himanshu Tajne on 23/07/2022 at 20:02 and modified by Himanshu Tajne on 23/07/2022 at 20:05. The workflow actions section shows one immediate action: 'Email Alert' with the description 'Welcome email'. A warning message states: 'You cannot add new time triggers to an active rule. Deactivate This Rule'.

Workflow Rule Detail

Rule Name	Welcome email	Object	Employee
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Employee: Job Status EQUALS Probation		
Rule Criteria	Employee: Job Status EQUALS Probation		
Created By	Himanshu Tajne, 23/07/2022, 20:02	Modified By	Himanshu Tajne, 23/07/2022, 20:05

Workflow Actions

Type	Description
Email Alert	Welcome email

Time-Dependent Workflow Actions [See an example](#)

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

The screenshot shows the Salesforce Employee record page for ABCD. The left sidebar contains navigation links: Aarogya Pharma, Home, Employees, Products, Hospitals, Doctors, Invoices, Departments, and Order Details. The main content area is titled 'Employee ABCD' and shows details for the employee. The employee's name is ABCD, department is MR, and job status is Probation. The employee's ID is E-0006, email is himanshutajne.sfdc@gmail.com, and pan number is [redacted]. The employee's address is [redacted], qualification is [redacted], city is [redacted], and state is [redacted]. The employee's date of birth is [redacted]. The employee's salary is [redacted]. The employee's account details are [redacted].

Employee ABCD

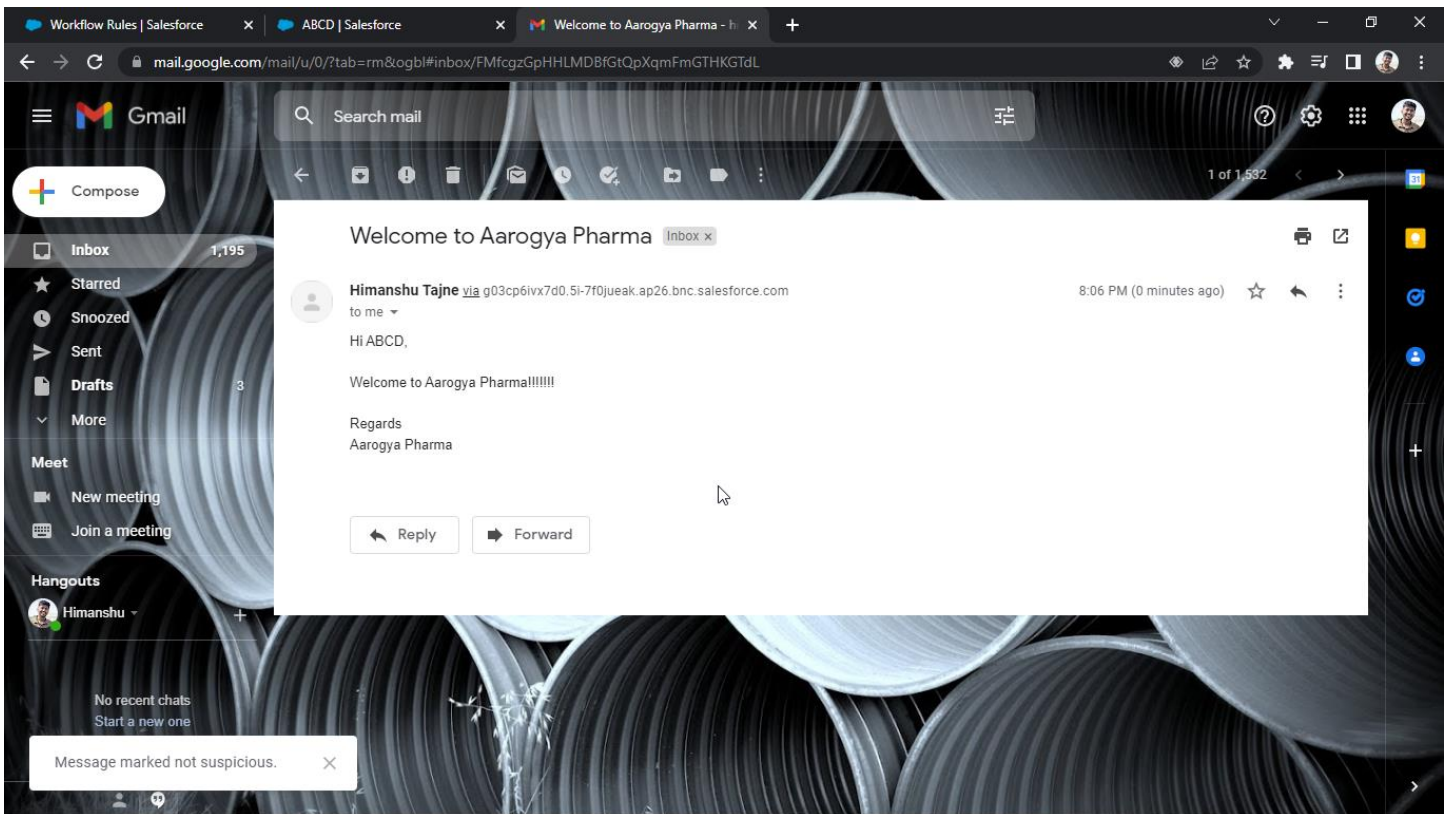
Related Details

Personal Details

Field	Value
Employee Name	ABCD
Department	MR
Phone	[redacted]
Address	[redacted]
Salary	[redacted]
State	[redacted]
Date of Birth	[redacted]
Job Status	Probation

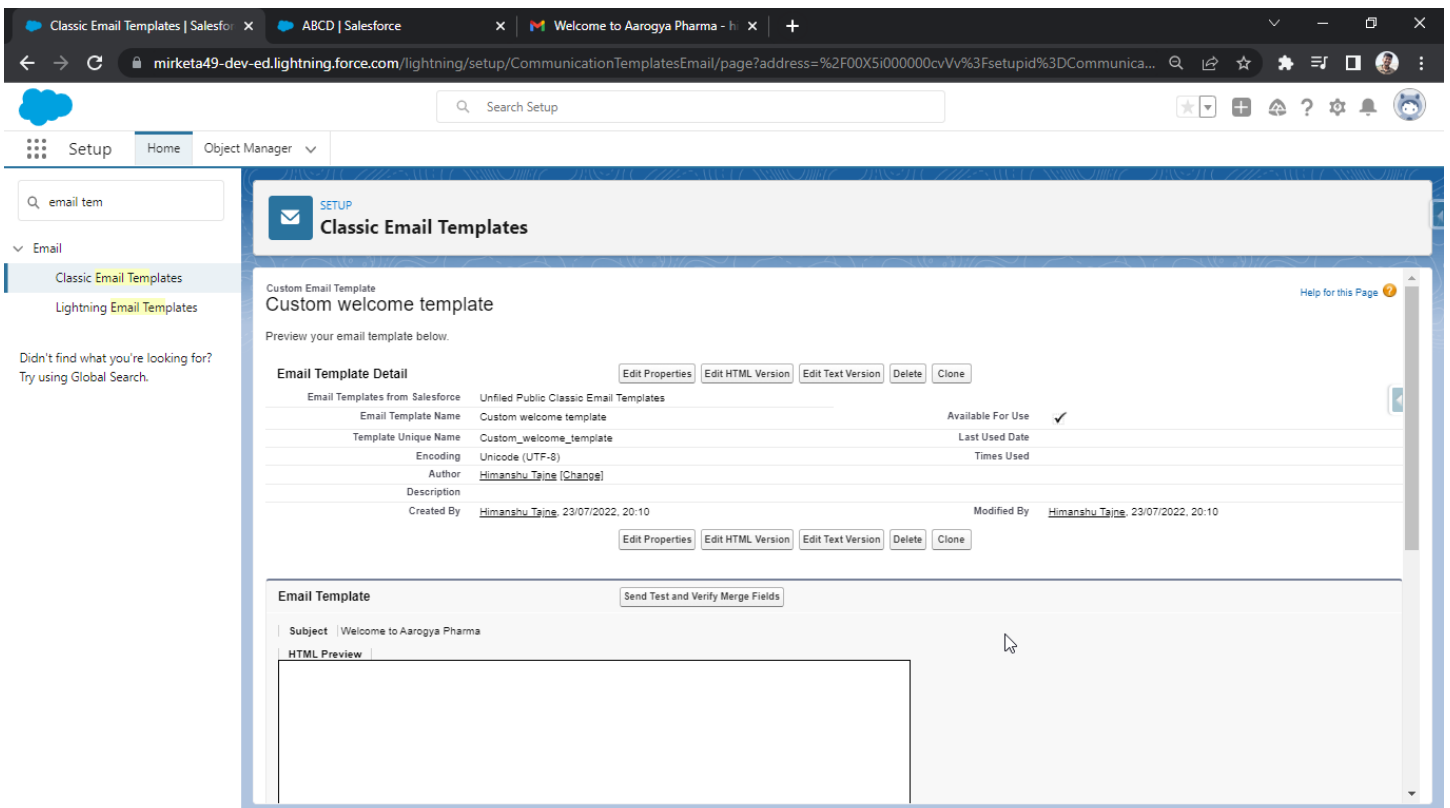
Account Details

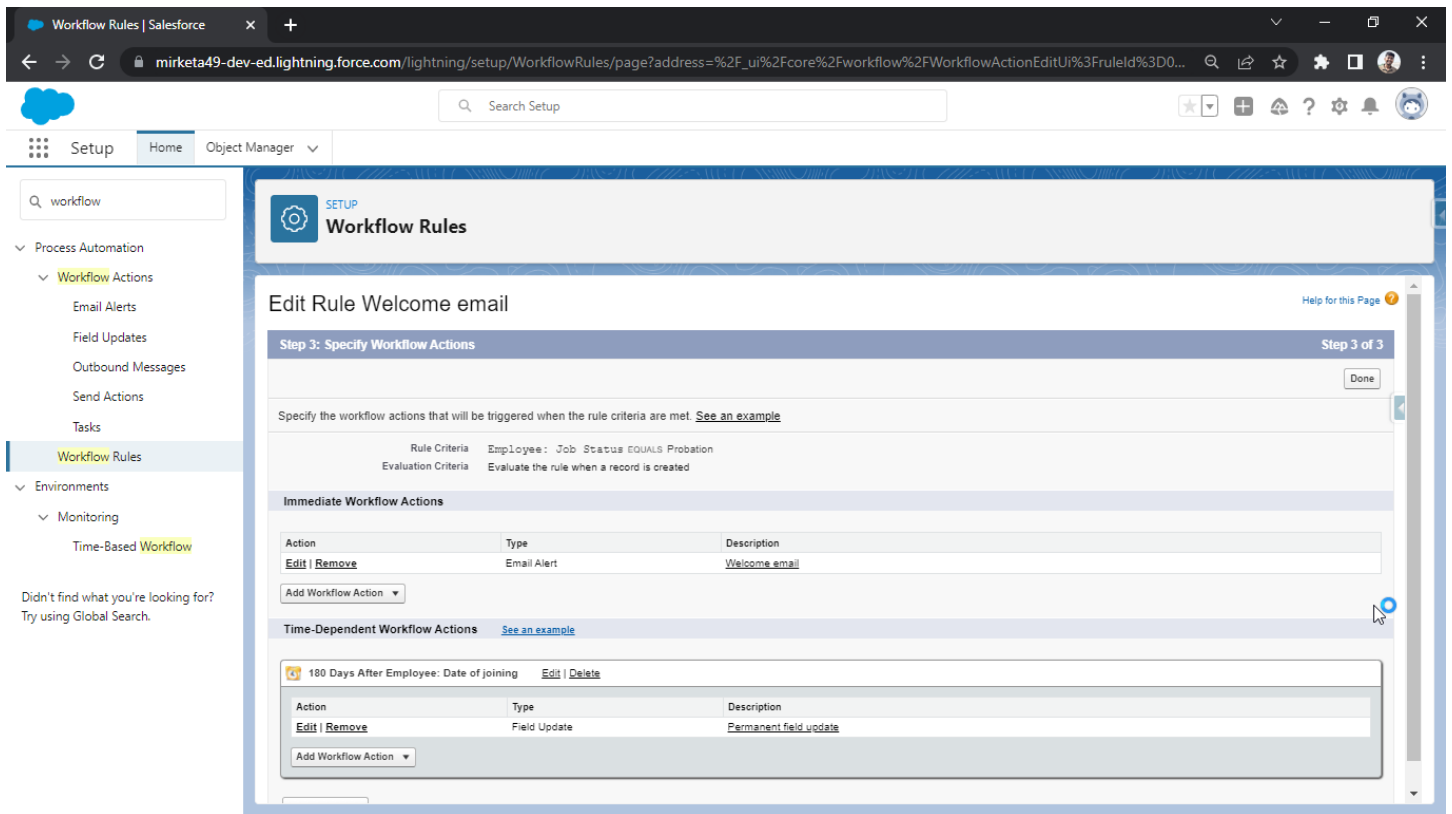
Field	Value
Bank	[redacted]
IFSC Code	[redacted]



2. In the same workflow Now, you also need to send one email (Custom - Without letter head)

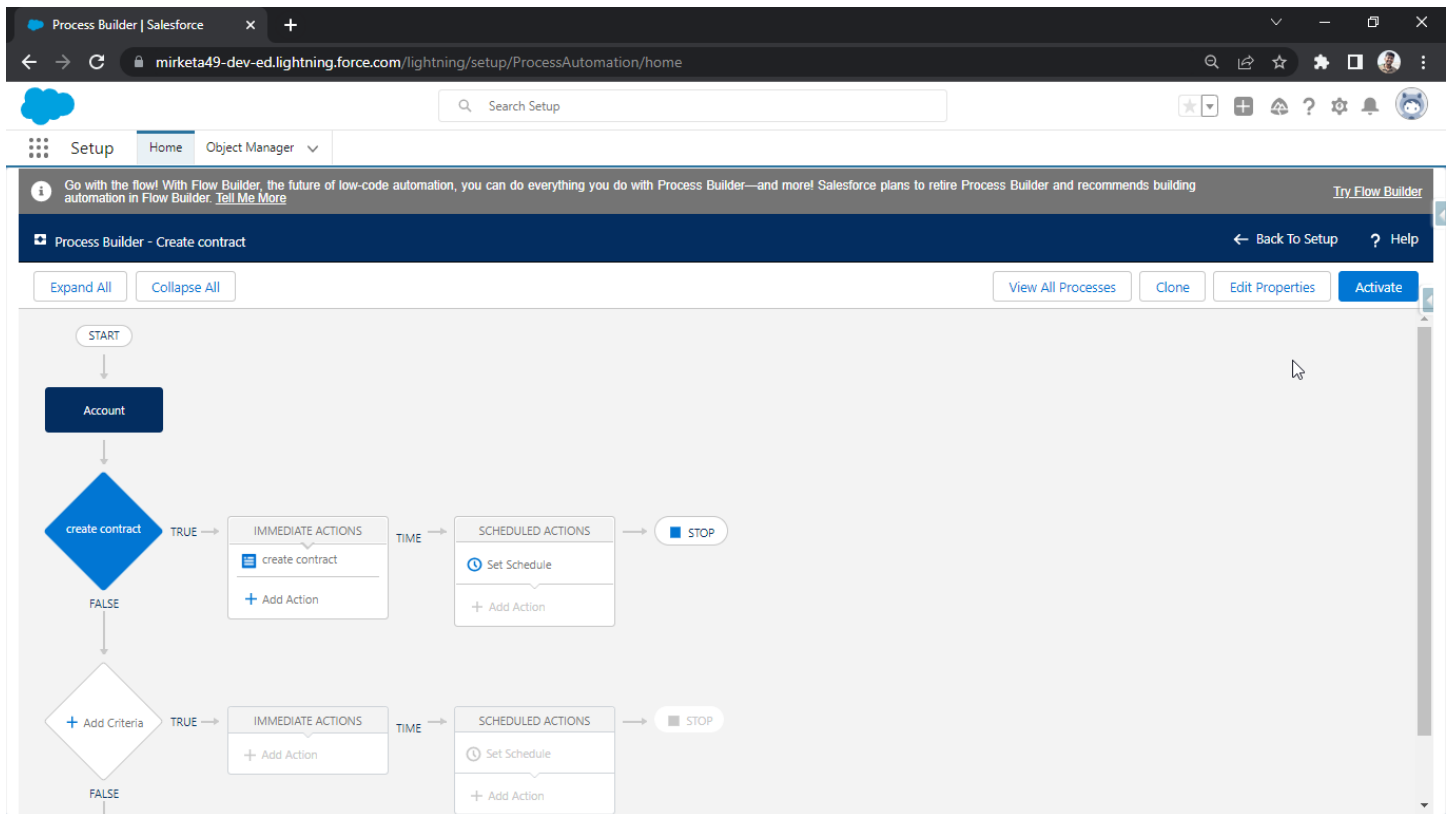
after 6 months of the employee Date of Joining for the Job confirmation and also update the job status as Permanent.



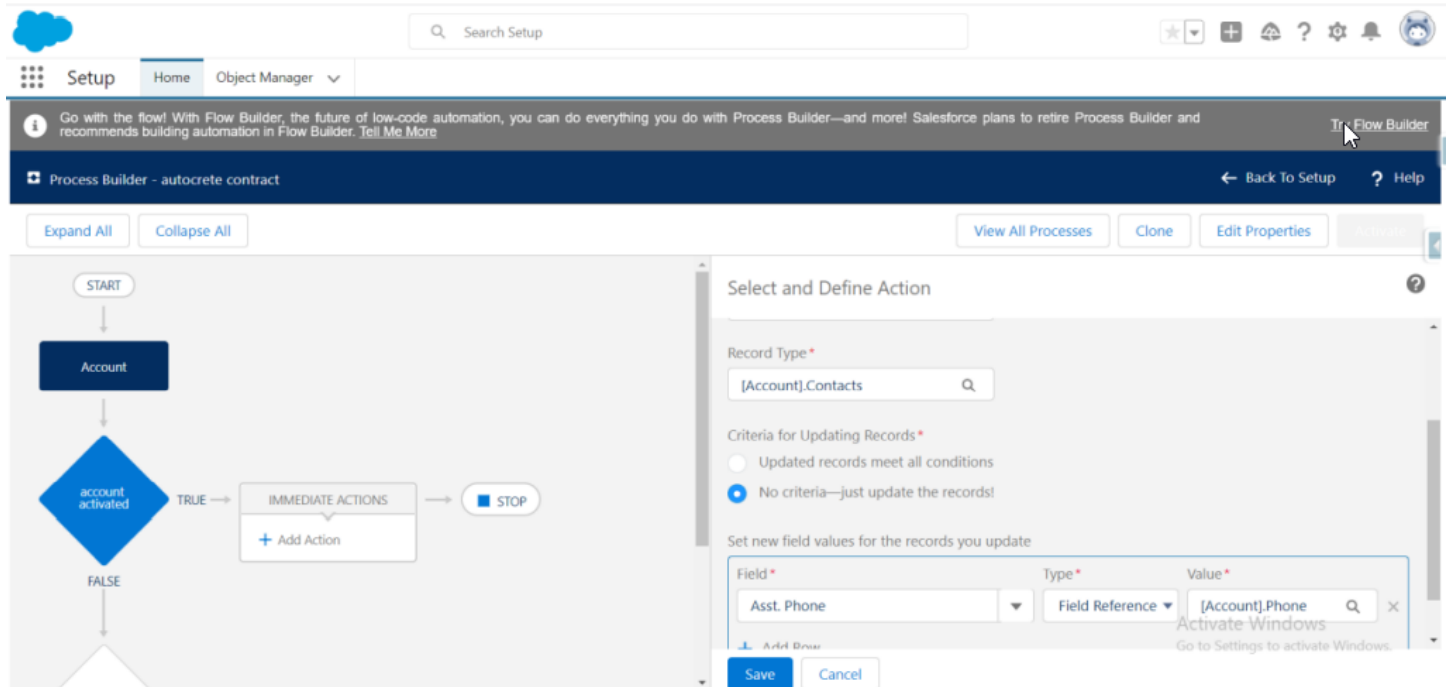


Q :- John is working as a system administrator in Universal containers . He has received a requirement from the management to auto create a contract as soon as an account gets created in salesforce and auto populate these values in the new contract.

- Contract Term (months)
- Contract start date - Account created date+90 days
- Status - Draft
- Associate the contract with the new account.



Q :- Alice is working as a system administrator with Universal containers. He has received a requirement that once an account gets activated, the contact asst. Phone field must be updated with account Phone field. Also post a msg on chatter that account has been updated.



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Process Builder - autocrete contract

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Account

account activated

TRUE

IMMEDIATE ACTIONS

Contact field update

+ Add Action

STOP

FALSE

Select and Define Action

Post to Chatter

Action Name *

account updated

Post to *

This Record

Message *

Merge Field

Add an existing topic...

Account has been updated

Save Cancel

Q :- If an opportunity is created or updated (trigger) and it's high-value (amount greater than 25000) and closed won (criteria), then create a draft contract (immediate action). Six days after the opportunity closes (schedule), create a follow-up task for the account owner (scheduled action)

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Process Builder - On opportunity object

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Opportunity

amount greater

TRUE

IMMEDIATE ACTIONS

+ Add Action

STOP

FALSE

Select and Define Action

contract created

Record Type *

Contract

Set Field Values

Field *	Type *	Value *
Account ID	Field Reference	[Opportunity].Accou...
Status	Picklist	Draft
Contract Start Date	Formula	(Opportunity).CloseDat...

Save Cancel

Q). Create Quick contact form (screen flow) to make sure the contact must be created..

