

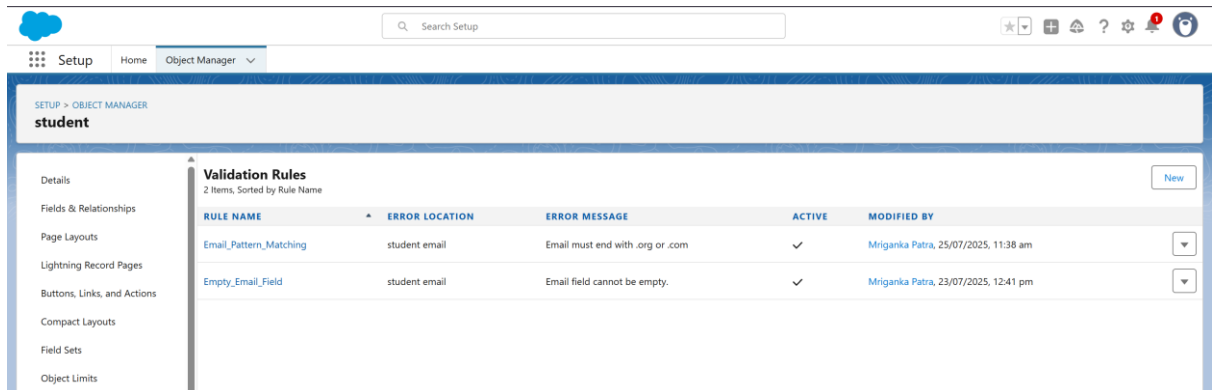
# Salesforce Tasks Examples

Name: Mriganka Patra

Emp No. 2415820

## 1. Validation Rules

1.1. Ensure Student's Email matches a certain pattern (e.g. Must end with .com or .org)

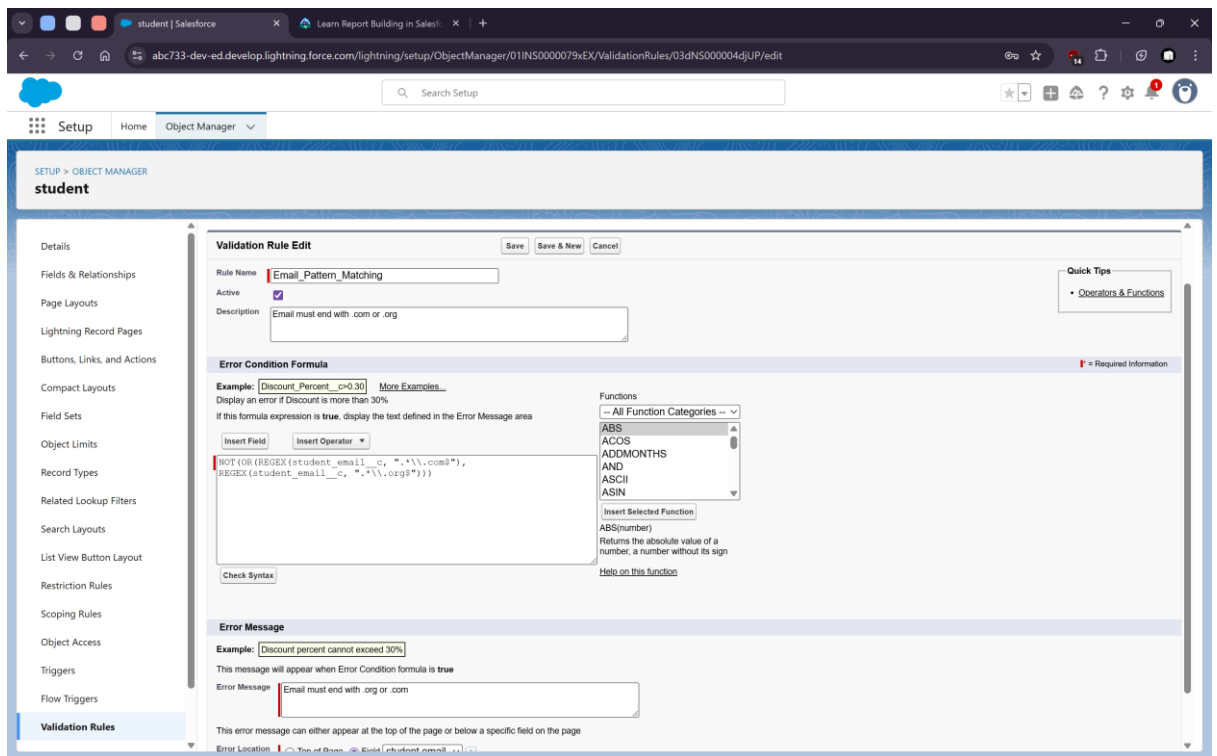


The screenshot shows the Salesforce Setup interface for the 'student' object. The 'Validation Rules' section is active, displaying a table with two rules:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email_Pattern_Matching	student email	Email must end with .org or .com	✓	Mriganka Patra, 25/07/2025, 11:38 am
Empty_Email_Field	student email	Email field cannot be empty.	✓	Mriganka Patra, 23/07/2025, 12:41 pm

1.2.

1.3.



The screenshot shows the 'Validation Rule Edit' interface for the 'Email\_Pattern\_Matching' rule. The rule is active, and the error condition formula is:

```
NOT (OR (REGEX (student_email_c, ".*\\.com$"),  
REGEX (student_email_c, ".*\\.org$")))
```

The error message is: 'Email must end with .org or .com'. The error location is set to 'Top of Page'.

1.4.

1.5.

1.6.

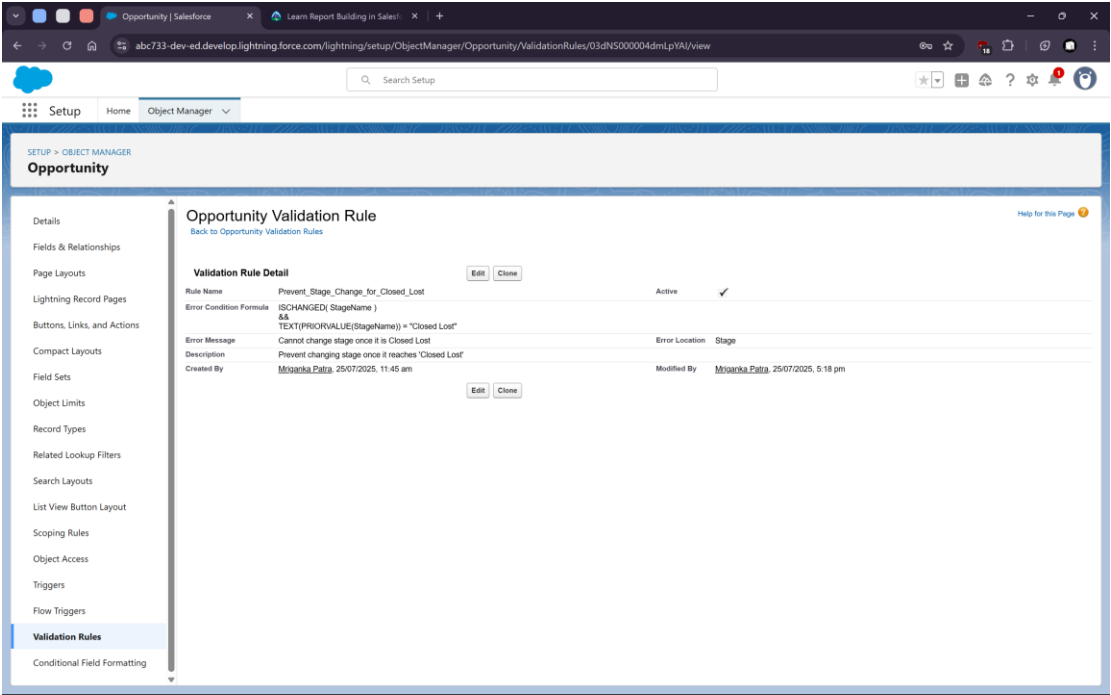
1.7.

1.8.

1.9.

1.10.

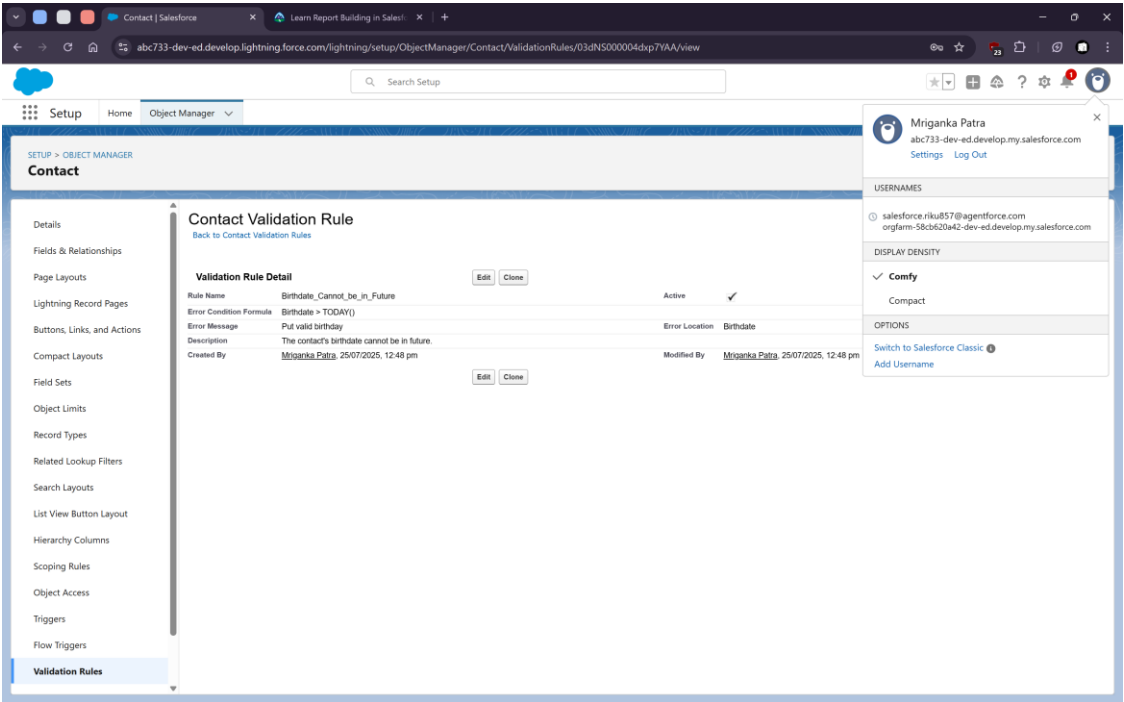
1.11. Prevent changing stage once it reaches “Closed Lost”



1.12.

1.13.

1.14. Ensure that a Contact’s birthdate is not in the future



1.15.

1.16.

1.17.

1.18.

1.19.

1.20.

1.21.

## 2. Flows

2.1. On creation of a contact if email is not blank set “Clean Status” as “Reviewed”

2.2.

The screenshot shows the Salesforce Flow Builder interface for a flow named "Update Status - V1". The flow is a Record-Triggered Flow that starts when a Contact record is created. The trigger condition is "A record is created" and it is optimized for "Fast Field Updates". The flow consists of three steps: a "Record-Triggered Flow Start" event, an "Update Records" step labeled "Set status active", and an "End" step. The "Update Records" step is configured to update the "Clean Status" field of the Contact record to the value "Reviewed". The right sidebar shows the configuration for the "Update Records" step, including the label "Set status active", API Name "Set\_status\_active", and a filter condition "Clean Status" set to "Reviewed".

2.3.

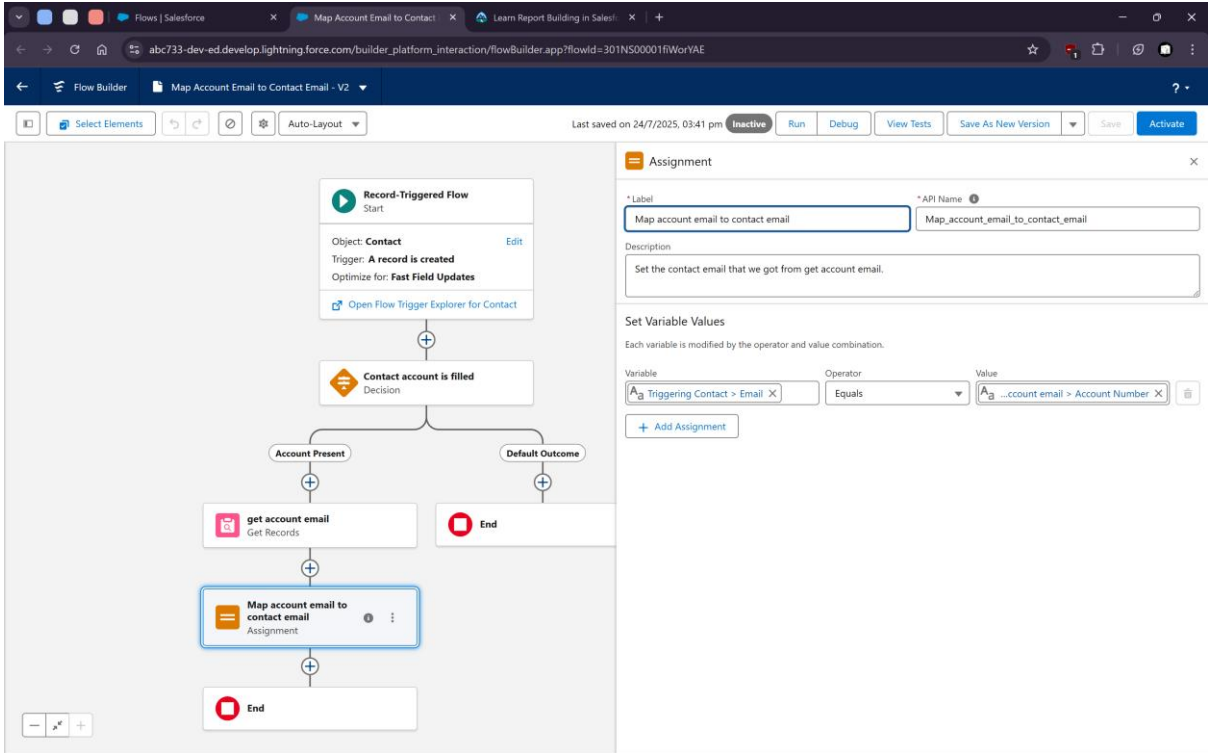
2.4. When account is created or updated, if the Industry is “Education” set Type as “Prospect”

The screenshot shows the Salesforce Flow Builder interface for a flow named "Set Type of Account at Creatino - V1". The flow is a Record-Triggered Flow that starts when an Account record is created or updated. The trigger condition is "A record is created or updated" and it is optimized for "Fast Field Updates". The flow consists of four steps: a "Record-Triggered Flow Start" event, a decision step "Is Industry Education", an "Update Records" step labeled "Update type as Prospect", and an "End" step. The "Update Records" step is configured to update the "Account Type" field of the Account record to the value "Prospect". The right sidebar shows the configuration for the "Update Records" step, including the label "Update type as Prospect", API Name "Update\_type\_as\_Prospect", and a filter condition "Account Type" set to "Prospect".

2.5.

2.6.

2.7. When contact is created, is contact's account is filled then map Account's email to contact's email.



2.8.

2.9.

2.10.

### 3. Security

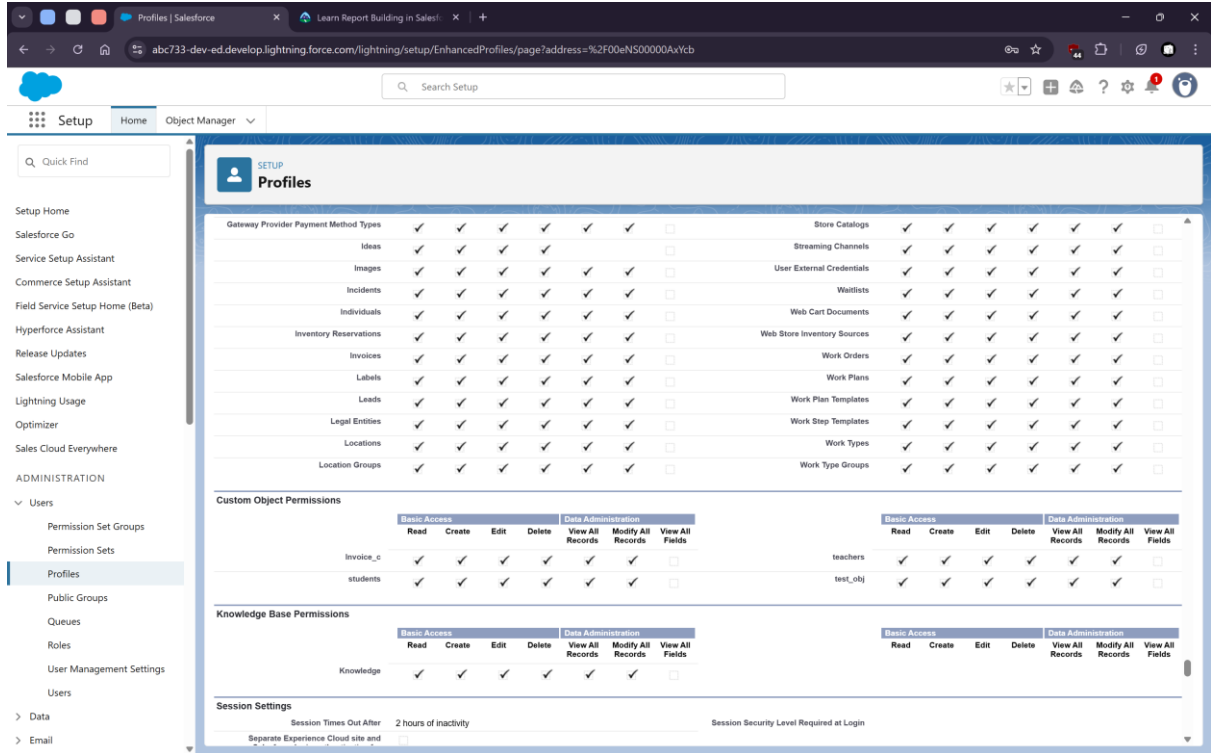
3.1. For custom object "Student" manage field level permissions for the profile "System Administrator"

The screenshot shows the Salesforce Setup interface. The left-hand pane shows the navigation menu with "Setup" selected. The main content area shows the "Field-Level Security for profile System Administrator" page. The page displays a table of field-level security settings for the "Student" object. The table has columns for "Field Name", "Field Type", "Read Access", and "Edit Access". The "Read Access" column has checkboxes for each field, and the "Edit Access" column has checkboxes for each field. The "Student Name" field has both Read and Edit access checked. The "Student Email" field has both Read and Edit access checked. The "Record Type" field has both Read and Edit access checked. The "Owner" field has both Read and Edit access checked. The "Rating" field has both Read and Edit access checked. The "Created By" field has both Read and Edit access checked. The "Gender" field has both Read and Edit access checked. The "Annual Revenue" field has both Read and Edit access checked.

Field Name	Field Type	Read Access	Edit Access
annual revenue	Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
gender	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
rating	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Record Type	Record Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
student email	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
student Name	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3.2.

3.3. We can also change standard and custom object permissions like create, read, write, delete etc.



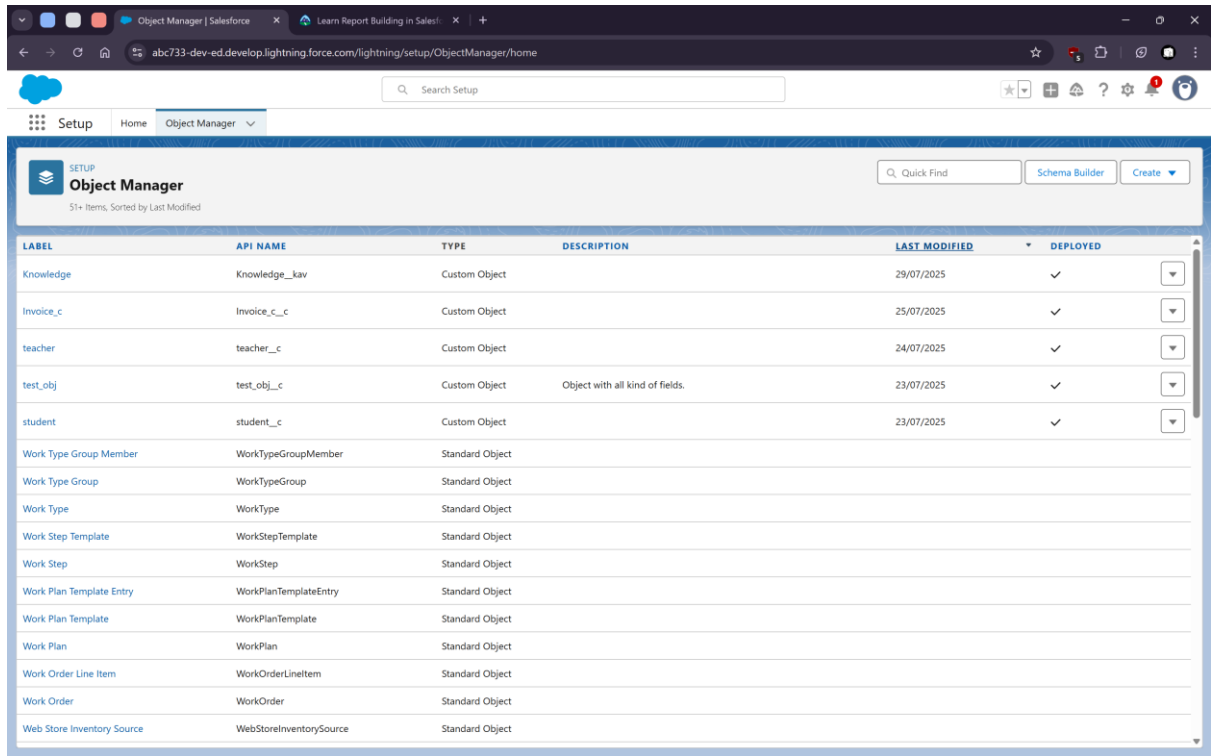
3.4.

3.5.

3.6.

## 4. Object manager and App Manager

4.1. Creating multiple custom objects



4.2.

4.3.

#### 4.4. Custom objects with all types of fields

The screenshot shows the Salesforce Setup interface for a custom object named 'test\_obj'. The 'Fields & Relationships' section is active, displaying a list of 24 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
auto_number	auto_number__c	Auto Number		<input type="checkbox"/>
checkbox	checkbox__c	Checkbox		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
currency	currency__c	Currency(18, 0)		<input type="checkbox"/>
date	date__c	Date		<input type="checkbox"/>
date_time	date_time__c	Date/Time		<input type="checkbox"/>
email	email__c	Email		<input type="checkbox"/>
formula	formula__c	Formula (Number)		<input type="checkbox"/>
geolocation	geolocation__c	Geolocation		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
multi_picklist	multi_picklist__c	Picklist (Multi-Select)		<input type="checkbox"/>
number	number__c	Number(16, 2)		<input type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>

4.5.

4.6.

The screenshot shows the Salesforce record page for a custom object named 'test\_obj'. The record is titled 'obj 2' and is owned by 'Mriganka Patra'. The 'Details' tab is active, showing a list of fields and their values. The 'Activity' tab is also visible on the right side of the page.

Field	Value
test_obj Name	obj 2
auto_number	A-0002
checkbox	<input type="checkbox"/>
currency	
date	
date_time	
email	
geolocation	
number	
percent	
phone	
picklist	
multi_picklist	
text	

4.7.

4.8.

#### 4.9. Created custom Application with objects

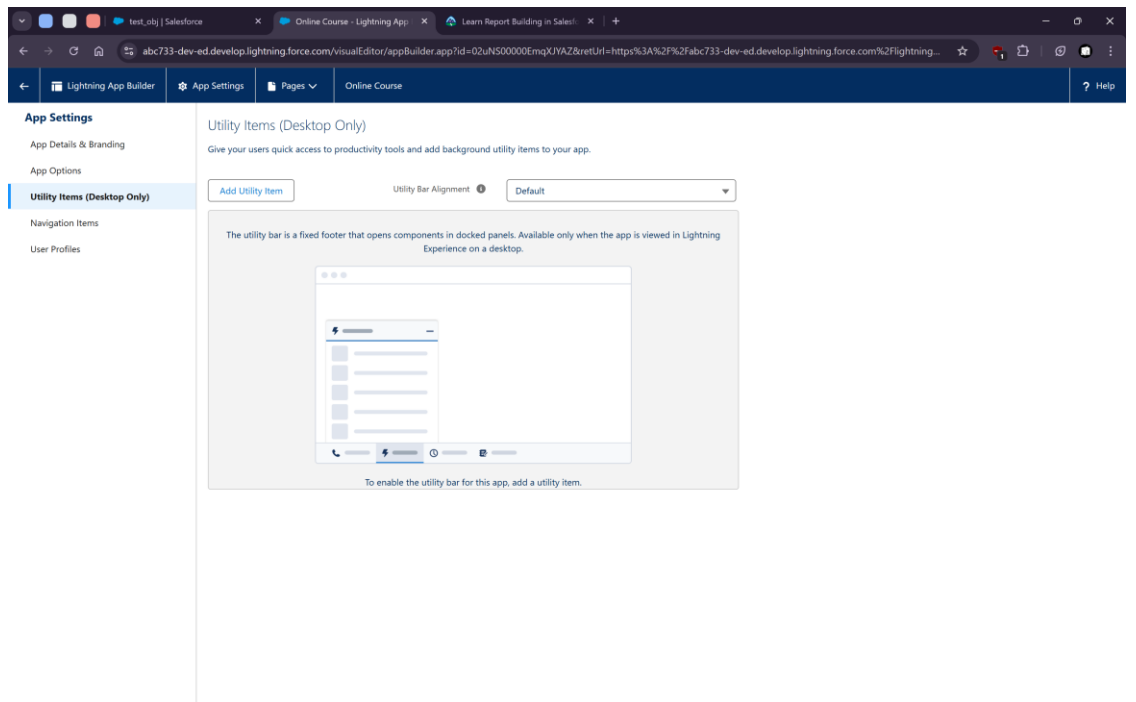
4.10.

4.11.  
4.12.  
4.13.

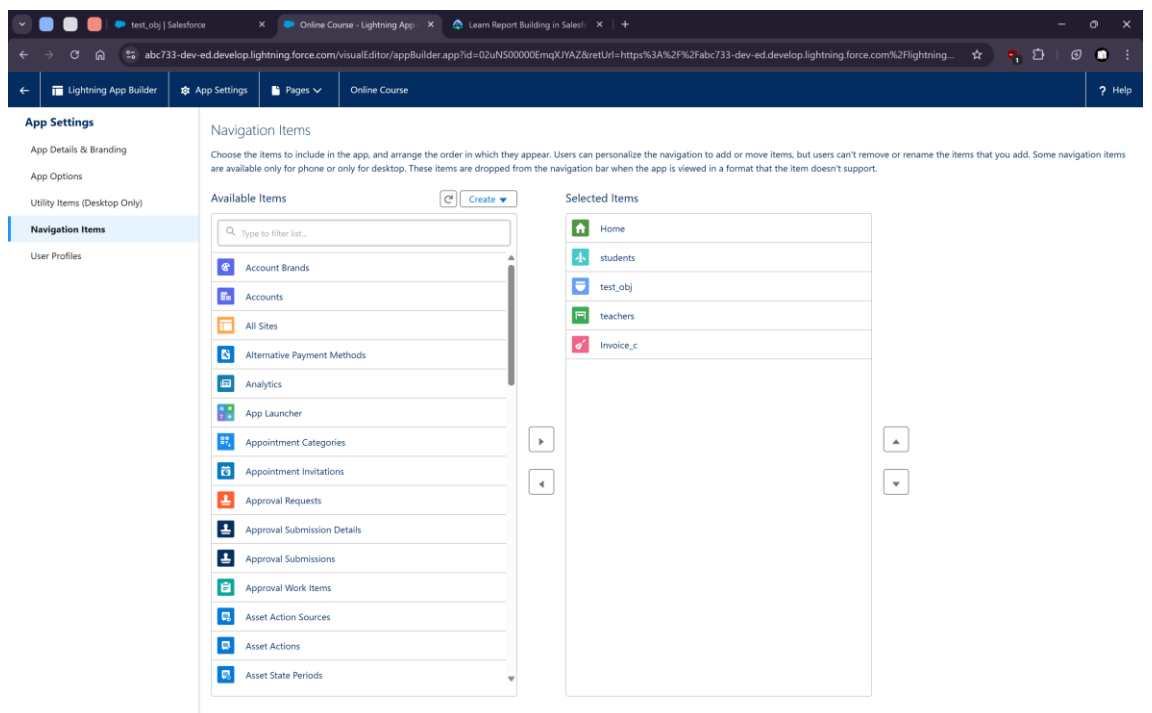
The screenshot shows the 'App Details & Branding' configuration page in the Salesforce Lightning App Builder. The left sidebar contains the 'App Settings' menu with options: App Details & Branding (selected), App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles. The main content area is titled 'App Details & Branding' and includes the instruction: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The configuration is divided into two columns: 'App Details' and 'App Branding'. In the 'App Details' column, there are input fields for 'App Name' (containing 'Online Course'), 'Developer Name' (containing 'Online\_Course'), and a 'Description' field with the placeholder 'Enter a description...'. In the 'App Branding' column, there is an 'Image' upload section with an 'Upload' button, a 'Primary Color Hex Value' dropdown set to '#0070D2', and a checkbox for 'Org Theme Options' labeled 'Use the app's image and color instead of the org's custom theme'. At the bottom, there is an 'App Launcher Preview' showing a blue square icon with 'OC' and the text 'Online Course'.

4.14.  
4.15.

The screenshot shows the 'App Options' configuration page in the Salesforce Lightning App Builder. The left sidebar contains the 'App Settings' menu with options: App Details & Branding, App Options (selected), Utility Items (Desktop Only), Navigation Items, and User Profiles. The main content area is titled 'App Options' and includes the instruction: 'Navigation and Form Factor'. The configuration is divided into two columns: 'Navigation and Form Factor' and 'Setup and Personalization'. In the 'Navigation and Form Factor' column, there are two sections: '\* Navigation Style' with radio buttons for 'Standard navigation' (selected) and 'Console navigation', and '\* Supported Form Factors' with radio buttons for 'Desktop and phone' (selected), 'Desktop', and 'Phone'. In the 'Setup and Personalization' column, there are two sections: 'Setup Experience' with radio buttons for 'Setup (full set of Setup options)' (selected) and 'Service Setup', and 'App Personalization Settings' with checkboxes for 'Disable end user personalization of nav items in this app', 'Disable temporary tabs for items outside of this app', and 'Use Omni-Channel sidebar'.

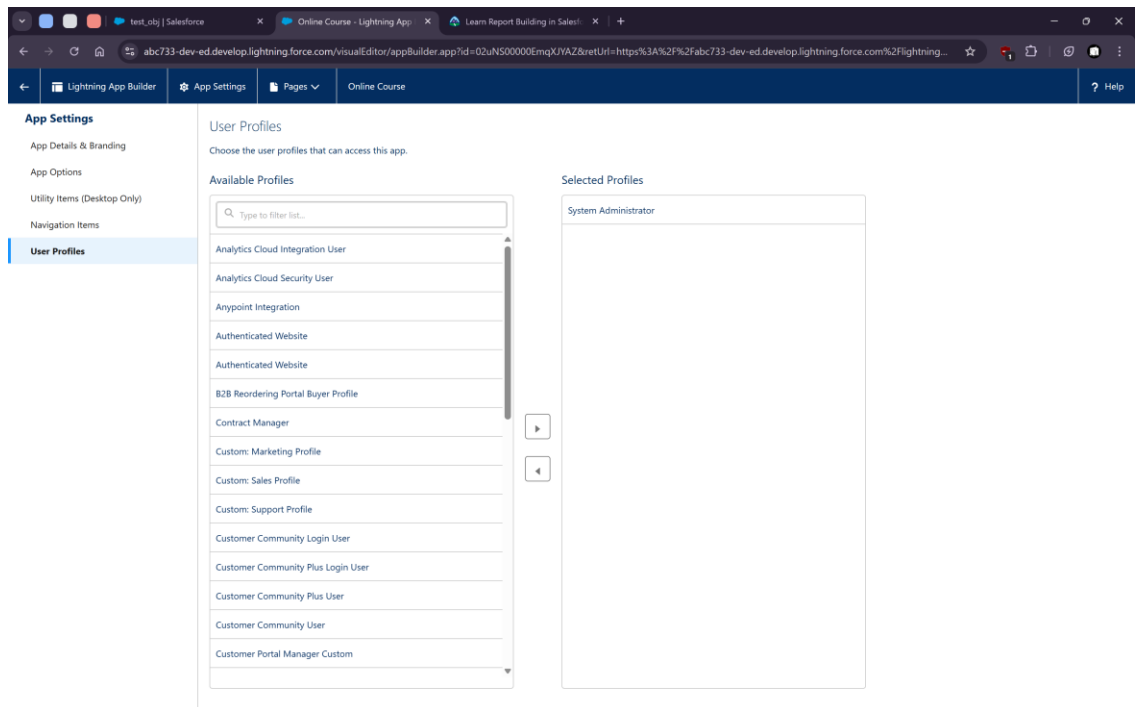


4.16.  
4.17.



4.18.  
4.19.  
4.20.





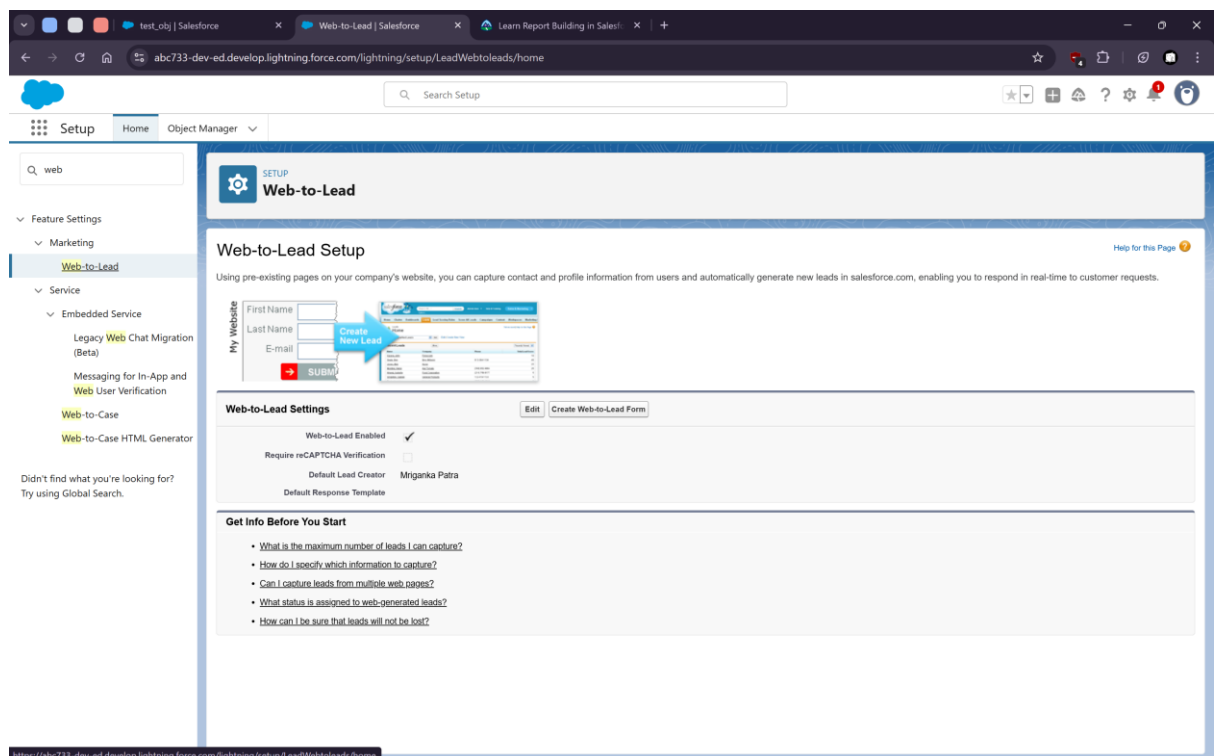
4.21.

4.22.

4.23.

4.24.

## 5. Web To Lead



5.1. <https://abc733-dev-ed.develop.lightning.force.com/lightning/setup/LeadWebtoleads/home>

5.2.

5.3.

5.4.

5.5.

## 6. Web to Case

The screenshot shows the Salesforce Setup page for Web-to-Case settings. The left sidebar contains a search bar with 'web' and a list of settings categories: Feature Settings, Marketing, Web-to-Lead, Service, Embedded Service, Legacy Web Chat Migration (Beta), Messaging for In-App and Web User Verification, Web-to-Case (selected), and Web-to-Case HTML Generator. The main content area is titled 'Web-to-Case Settings' and includes a help link. It contains two sections: 'Basic Settings' and 'Auto-Response Email Settings'. The 'Basic Settings' section has three options: 'Enable Web-to-Case' (checked), 'Require reCAPTCHA Verification' (unchecked), and 'Default Case Origin' (set to 'Web'). The 'Auto-Response Email Settings' section has three options: 'Default Response Template' (set to 'Support: Case Created (We)'), 'Hide Record Information' (unchecked), and 'Email Signature' (empty). At the bottom are 'Save' and 'Cancel' buttons.

6.1. \_\_\_\_\_

6.2. \_\_\_\_\_

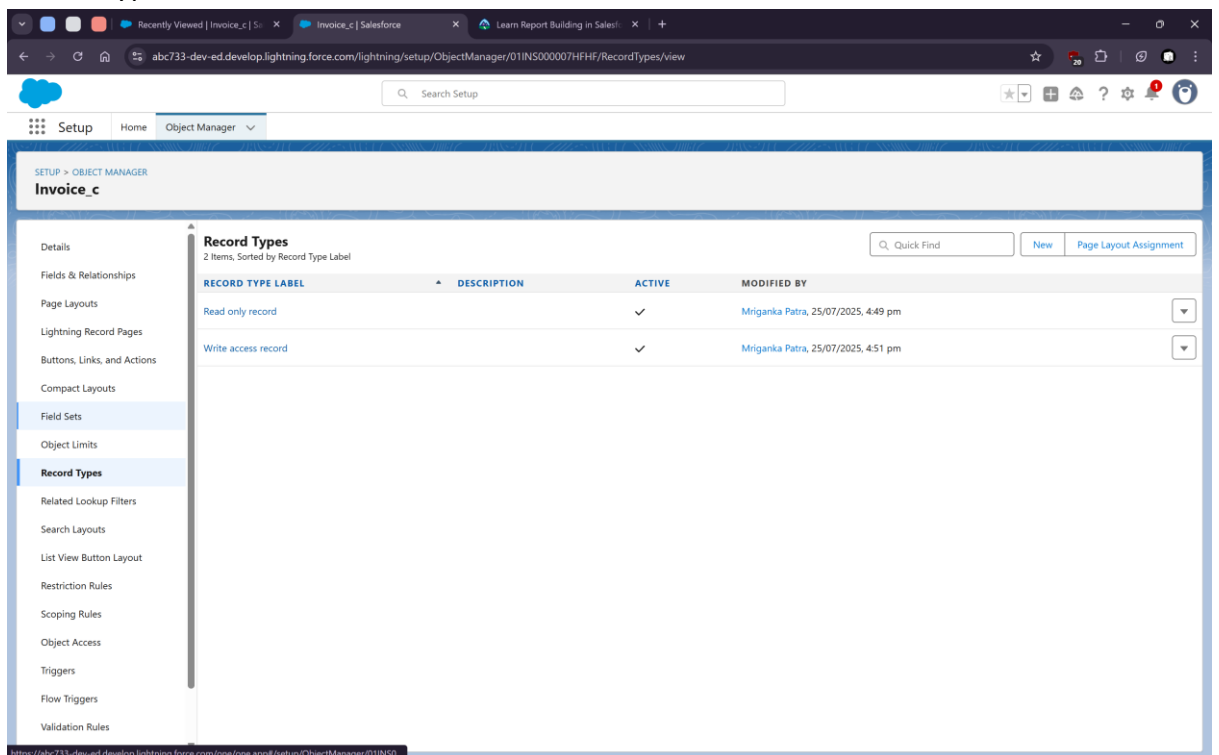
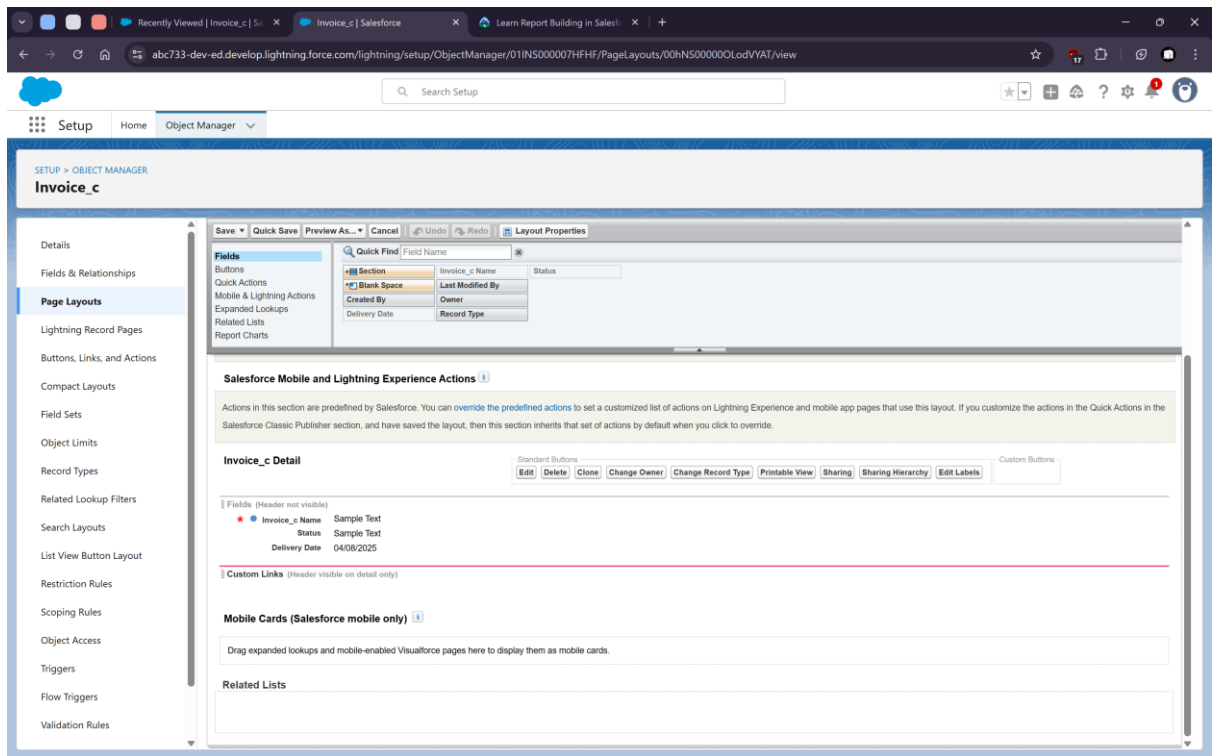
6.3. \_\_\_\_\_

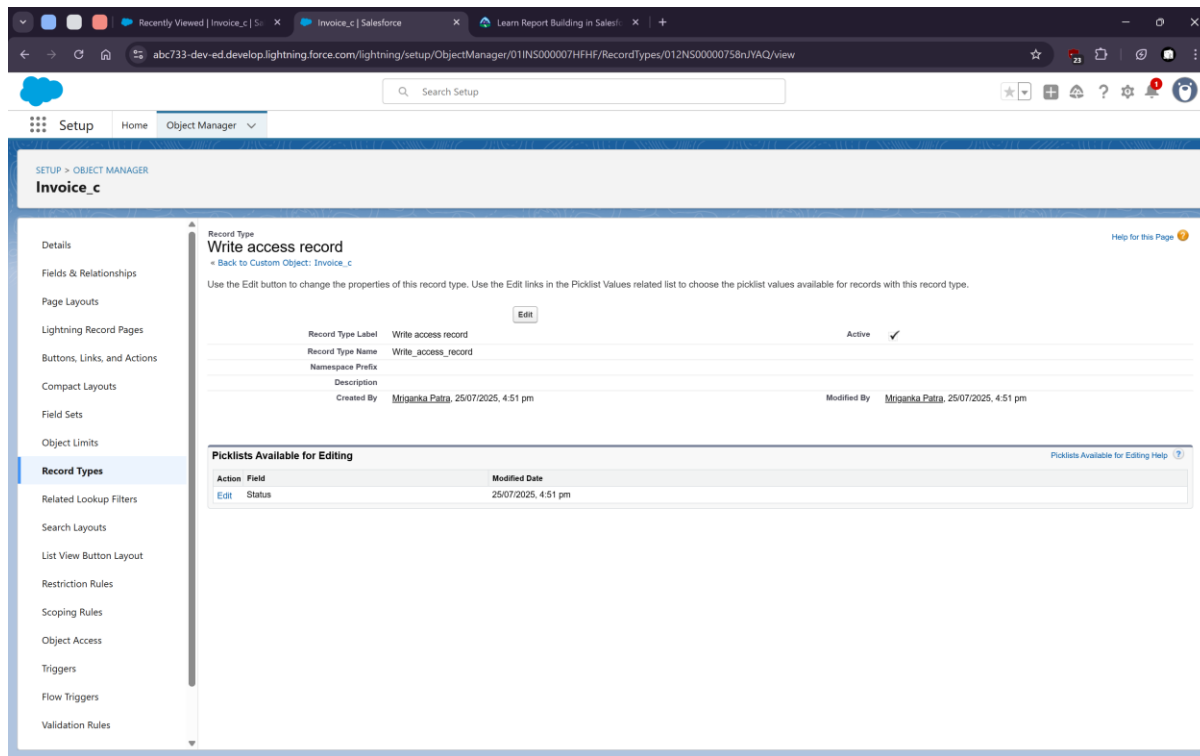
## 7. Page Layout and Record types

The screenshot shows the Salesforce Setup page for Page Layouts for the 'Invoice\_c' object. The left sidebar contains a search bar and a list of settings categories: Details, Fields & Relationships, Page Layouts (selected), 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, Object Access, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Page Layouts' and includes a 'Quick Find' search bar, a 'New' button, and a 'Page Layout Assignment' button. It displays a table with 3 items, sorted by Page Layout Name. The table has three columns: 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The data rows are: 'Invoice\_c Layout' (created by Mriganka Patra, 25/07/2025, 4:29 pm; modified by Mriganka Patra, 25/07/2025, 4:52 pm), 'Read only layout' (created by Mriganka Patra, 25/07/2025, 4:35 pm; modified by Mriganka Patra, 25/07/2025, 4:52 pm), and 'Write access Layout' (created by Mriganka Patra, 25/07/2025, 4:47 pm; modified by Mriganka Patra, 25/07/2025, 4:52 pm). Each row has a dropdown arrow on the right.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Invoice_c Layout	Mriganka Patra, 25/07/2025, 4:29 pm	Mriganka Patra, 25/07/2025, 4:52 pm
Read only layout	Mriganka Patra, 25/07/2025, 4:35 pm	Mriganka Patra, 25/07/2025, 4:52 pm
Write access Layout	Mriganka Patra, 25/07/2025, 4:47 pm	Mriganka Patra, 25/07/2025, 4:52 pm

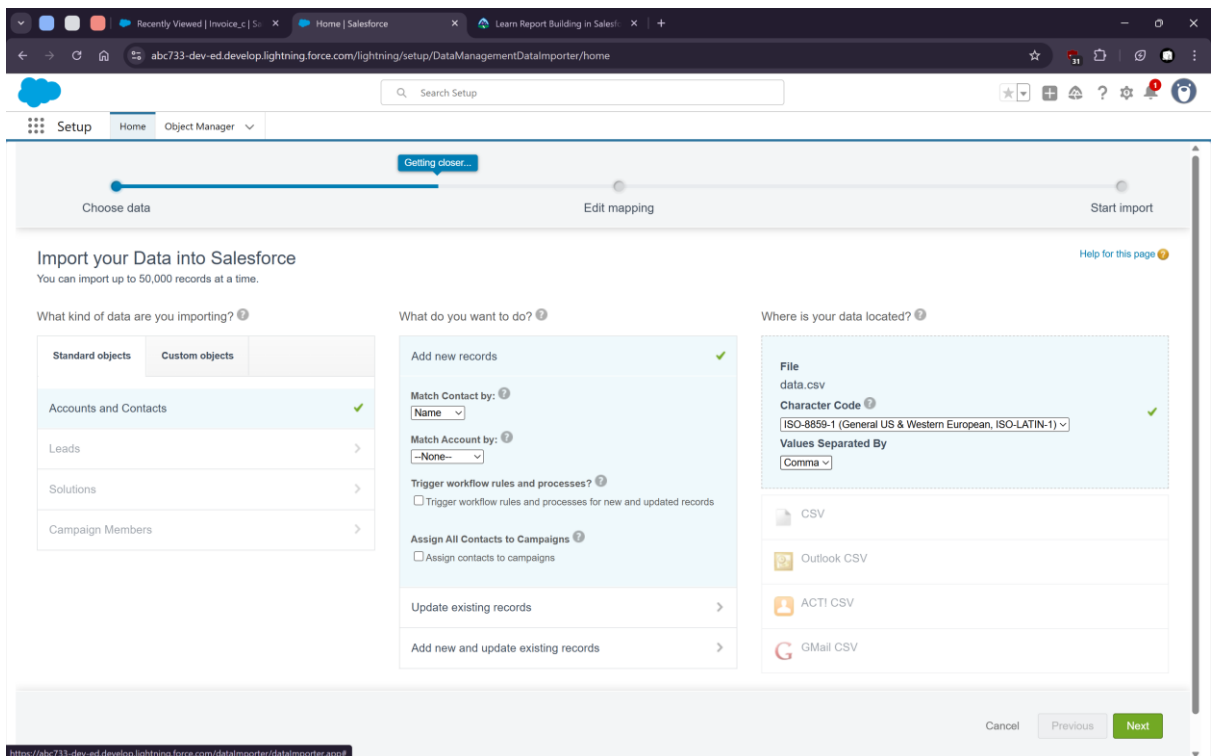
- 7.1. \_\_\_\_\_
- 7.2. \_\_\_\_\_
- 7.3. \_\_\_\_\_



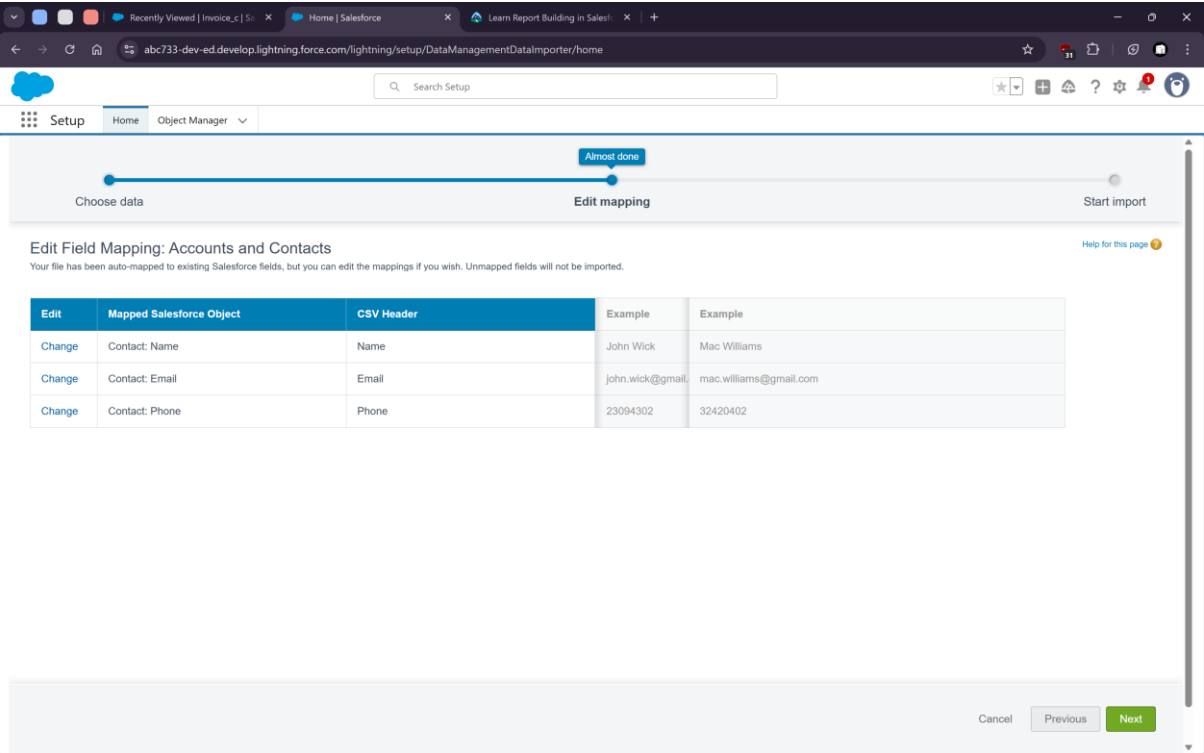


## 8. Data Import wizard

### 8.1. Importing data using csv files



8.6. Map the fields

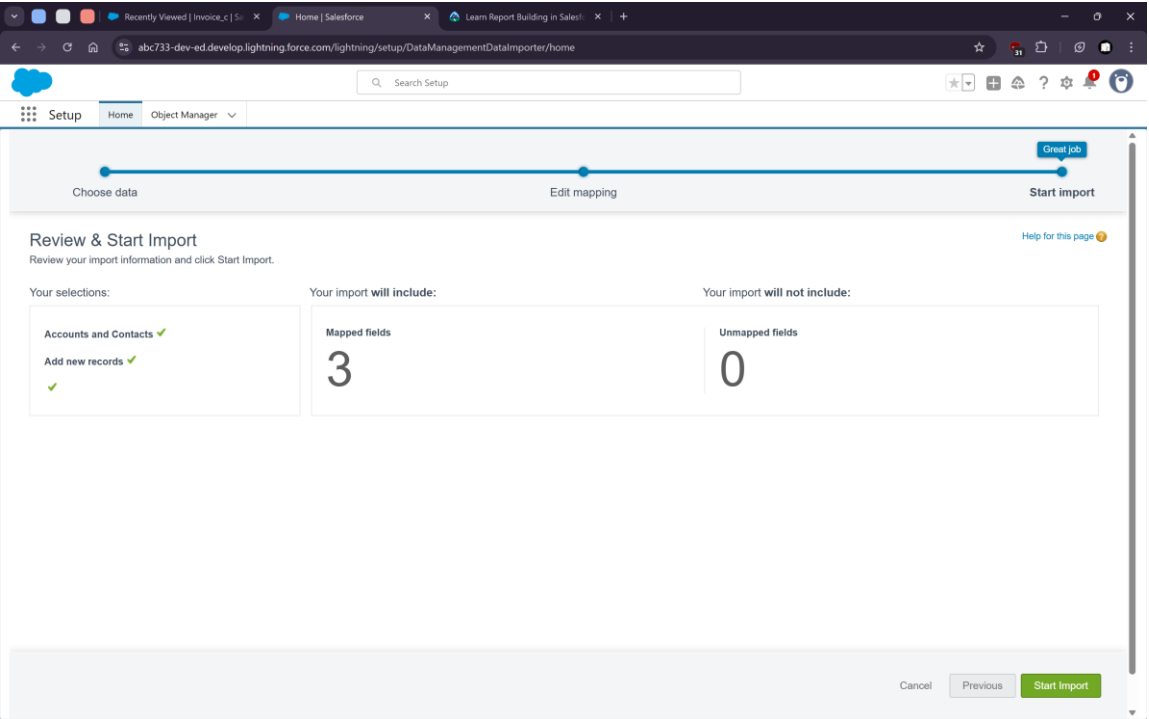


8.7.

8.8.

8.9. Import the data

8.10.



8.11.

8.12.

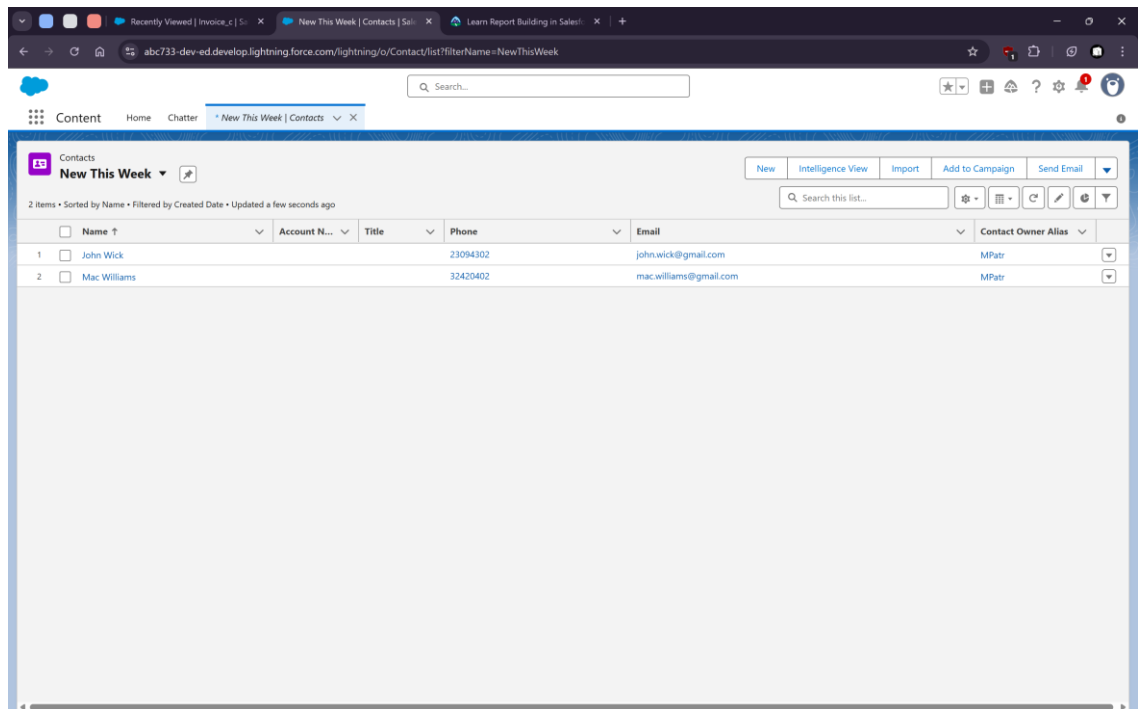
8.13.

8.14.

8.15.

8.16. Verify the imported data

8.17.

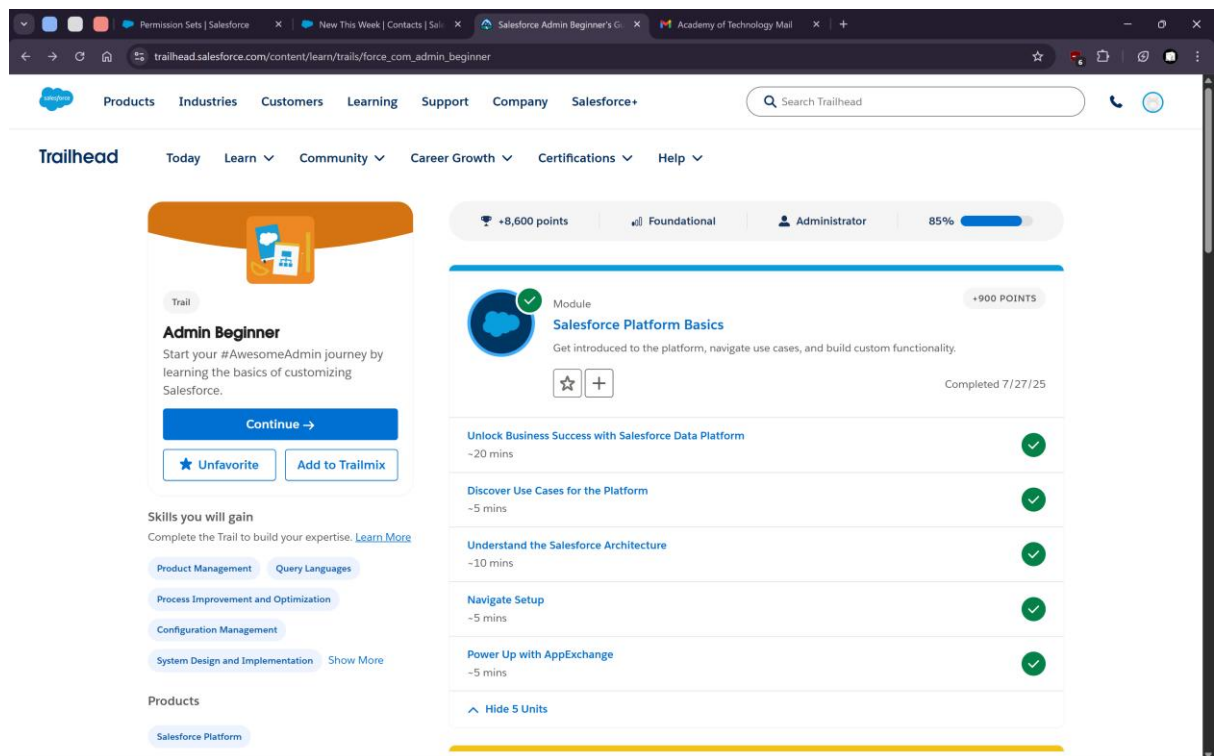


8.18.

8.19.

8.20.

## 9. Trailhead Tasks



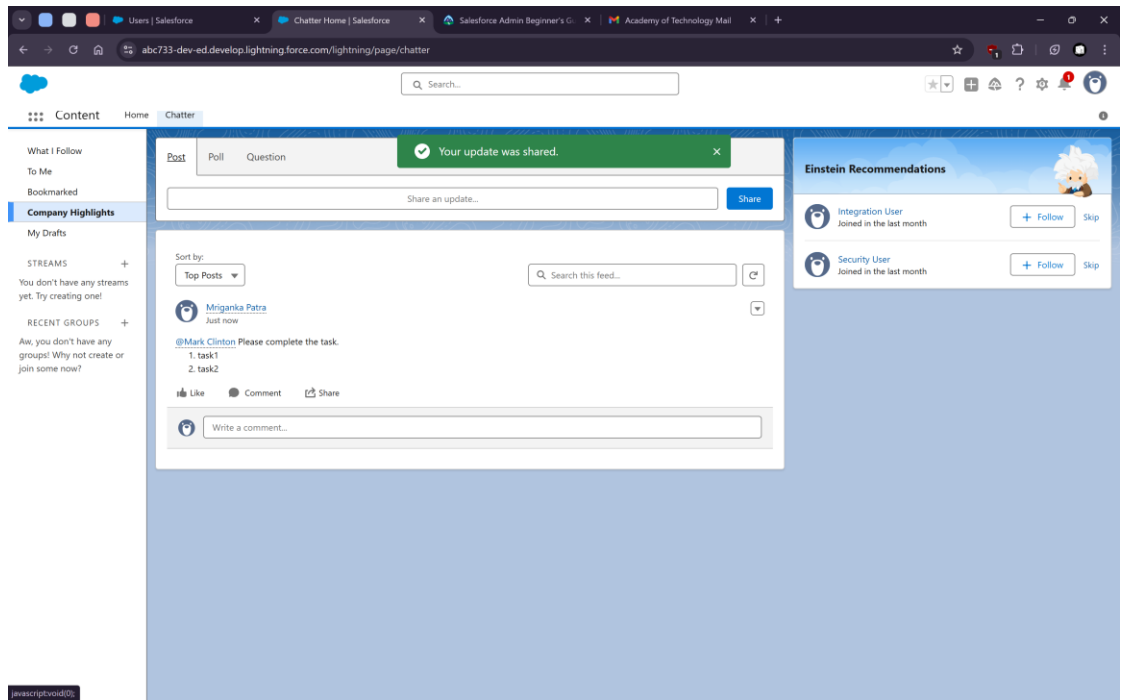
9.1.

9.2.

9.3.

9.4.

## 10. Chatter



10.1.