

Assignment 10

1. Introduce a field wallet balance which is a formula field updated as wallet balance – bill amount.

Ans:

Wallet Custom Field
New Wallet Balance
[Back to Wallet](#)

Custom Field Definition Detail

Field Information

Field Label	New Wallet Balance	Object Name	Wallet
Field Name	New_Wallet_Balance		
API Name	New_Wallet_Balance__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Puja Kumari, 15/11/2024, 4:50 pm	Modified By	Puja Kumari, 15/11/2024, 4:50 pm

Formula Options

Data Type	Formula
Decimal Places	2
Wallet_Balance__c - Bill_Amount__c	

Wallet
Paytm

Related Details

Wallet Name	Paytm	Owner	Puja Kumari
Bill		Currency	INR - Indian Rupee
Bill Amount	INR 270.00		
Wallet Balance	INR 500.00		
New Wallet Balance	INR 230.00		
Created By	Puja Kumari, 15/11/2024, 5:02 pm	Last Modified By	Puja Kumari, 15/11/2024, 5:02 pm

2. The field in wallet: wallet balance should have a validation process where wallet balance should never be negative.

SETUP

Object Manager

Wallet Validation Rule

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Validation Rule Detail

Edit

Clone

Rule Name	Wallet_Balance_should_not_Negative	Active	✓
Error Condition Formula	New_Wallet_Balance_c < 0		
Error Message	Wallet balance cannot be negative.	Error Location	Top of Page
Description			
Created By	Puja Kumari, 15/11/2024, 5:26 pm	Modified By	Puja Kumari, 15/11/2024, 5:26 pm

Edit

Clone

Wallet

Paytm

Related

Details

* = Required Information

* Wallet Name

Paytm

Owner

Puja Kumari

Bill

Search Bills...

Currency

INR - Indian Rupee

Bill Amount

100

Wallet Balance

50

New Wallet Balance

INR 50.00

This field is calculated upon save

Created By

Puja Kumari, 15/11/2024, 5:02 pm

By

mari, 15/11/2024, 5:29 pm

We hit a snag.

Review the errors on this page.

• Wallet balance cannot be negative.

Cancel

Save

3. Create a process that sends a mail if the wallet balance is less than 100.

Wallet

Phonepe Wallet

* = Required Information

* Wallet Name

Phonepe Wallet

Owner

Puja Kumari

Bill

Search Bills...

Currency

INR - Indian Rupee

Bill Amount

50

Wallet Balance

99

New Wallet Balance

INR 50.00

This field is calculated upon save

Created By

Puja Kumari, 15/11/2024, 5:47 pm

By

mari, 15/11/2024, 5:55 pm

We hit a snag.

Review the errors on this page.

- We can't save this record because the "Low Wallet Balance" process failed. Give your Salesforce admin these details. 0 recipients Error ID: 651509025-218904 (-1984209710)0 recipients Error ID: 651509025-218904 (-1984209710)

Cancel

Save

4. A roll up summary having sum of the entire bill generated to the user so far.

User Custom Field

Total Bill Amount

[Back to User](#)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Total Bill Amount	Object Name	User
Field Name	Total_Bill_Amount		
API Name	Total_Bill_Amount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Puja Kumari, 15/11/2024, 6:52 pm	Modified By	Puja Kumari, 15/11/2024, 6:52 pm

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	SUM
Summarized Object	Bill		
Field to Aggregate	Bill_Bill Amount		
Filter Criteria			

Bill

puja Kumari

Related

Details

Bill Name

puja Kumari

Currency

INR - Indian Rupee

Method of Payment

UPI

User

Puja

Bill Amount

INR 500.00

Created By

Puja Kumari, 15/11/2024, 6:57 pm

Last Modified By

Puja Kumari, 15/11/2024, 6:57 pm

User

Puja

Related

Details

User Name

Puja

Currency

INR - Indian Rupee

Wallet

Paytm

Total Bill Amount

INR 1,000.00

Created By

Puja Kumari, 15/11/2024, 6:56 pm

Last Modified By

Puja Kumari, 15/11/2024, 6:59 pm