

Capstone Project 1

1. Object Creation

Create the following custom objects in Salesforce Developer Platform:

- **Course**

The screenshot shows the Salesforce Setup interface for the 'Course' object. The left sidebar contains a list of configuration options: 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 'Details' section is selected, showing the following configuration:

| Field | Value |
|---------------------|-------------------------------------|
| Description | |
| API Name | Course__c |
| Custom | <input checked="" type="checkbox"/> |
| Singular Label | Course |
| Plural Label | Courses |
| Enable Reports | <input checked="" type="checkbox"/> |
| Track Activities | <input checked="" type="checkbox"/> |
| Track Field History | <input checked="" type="checkbox"/> |
| Deployment Status | Deployed |
| Help Settings | Standard salesforce.com Help Window |

Buttons for 'Edit' and 'Delete' are visible in the top right corner.

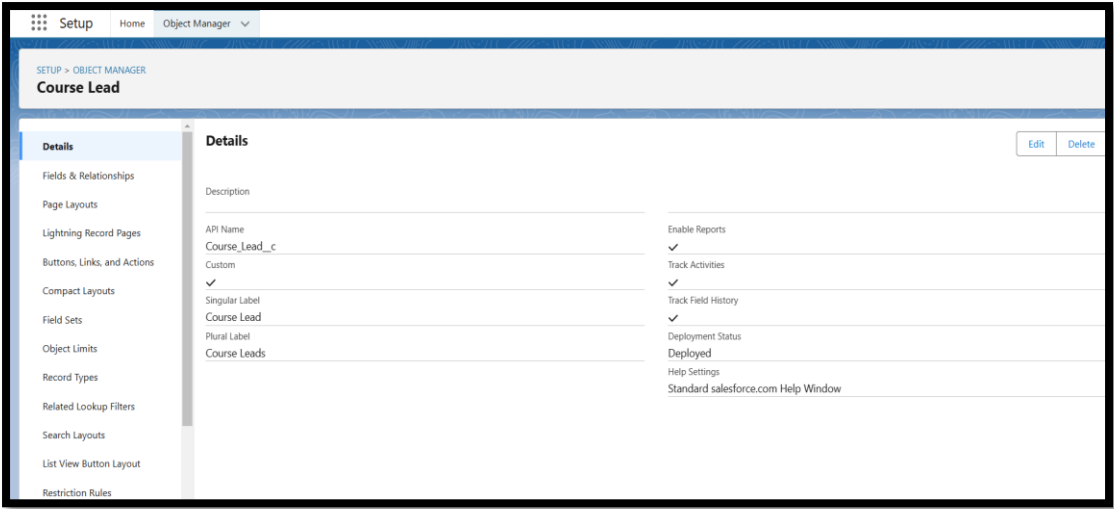
- **Subjects**

The screenshot shows the Salesforce Setup interface for the 'Subject' object. The left sidebar contains a list of configuration options: 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, and Restriction Rules. The 'Details' section is selected, showing the following configuration:

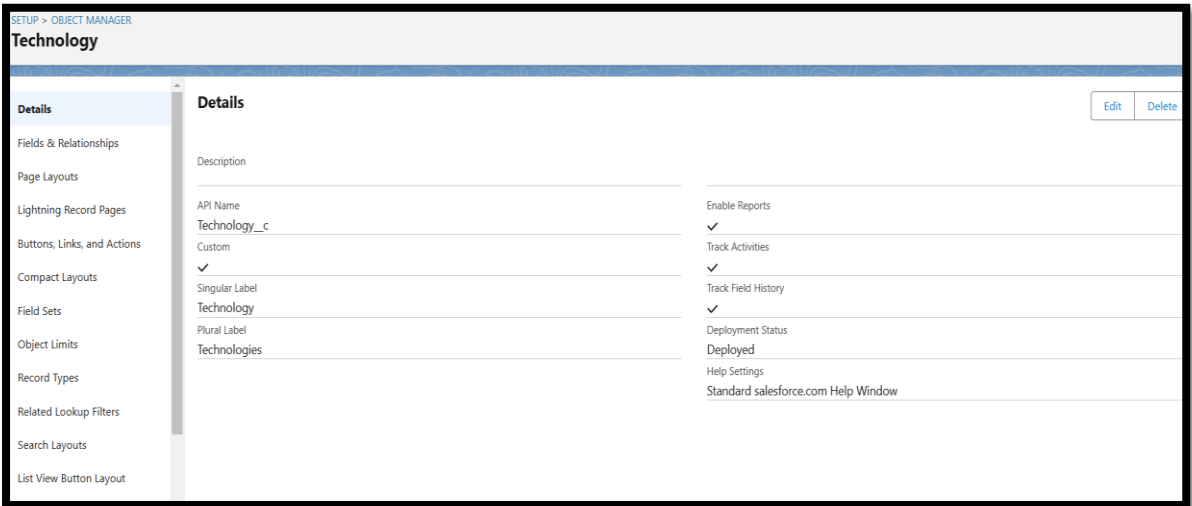
| Field | Value |
|---------------------|-------------------------------------|
| Description | |
| API Name | Subject__c |
| Custom | <input checked="" type="checkbox"/> |
| Singular Label | Subject |
| Plural Label | Subjects |
| Enable Reports | <input checked="" type="checkbox"/> |
| Track Activities | <input checked="" type="checkbox"/> |
| Track Field History | <input checked="" type="checkbox"/> |
| Deployment Status | Deployed |
| Help Settings | Standard salesforce.com Help Window |

Buttons for 'Edit' and 'Delete' are visible in the top right corner.

- **Course Leads**



- **Technology**



2. Field Creation:

Create fields for each custom object as specified.

A. Courses Fields

a) Course Name

Course Custom Field

Course Name

[Back to Course](#)
[Help for this Page](#)

[Set Field-Level Security](#)
[View Field Accessibility](#)

Field Information

| | | | |
|---------------------------|-------------|------------|------|
| Field Label | Course Name | Field Name | Name |
| Data Type | Text(80) | | |
| Description | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |

Validation Rules

[New](#)
[Validation Rules Help](#)

No validation rules defined.

b) No. of Modules

Course Custom Field

No. of Modules

[Back to Course](#)
[Help for this Page](#)

[Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)
[Where is this used?](#)

Field Information

| | | | |
|---------------------------|---------------------------------|-------------|---------------------------------|
| Field Label | No. of Modules | Object Name | COURSE |
| Field Name | No_of_Modules | Data Type | Number |
| API Name | No_of_Modules__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Puja Kumar: 20/11/2024, 6:22 pm | Modified By | Puja Kumar: 20/11/2024, 6:22 pm |

General Options

| | |
|---------------|--------------------------|
| Required | <input type="checkbox"/> |
| Unique | <input type="checkbox"/> |
| External ID | <input type="checkbox"/> |
| AI Prediction | <input type="checkbox"/> |
| Default Value | |

c) Course Duration

SETUP > OBJECT MANAGER

Course

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

Course Custom Field

Course Duration

[Back to Course](#)
[Help for this Page](#)

[Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)
[Where is this used?](#)

Field Information

| | | | |
|---------------------------|---------------------------------|-------------|---------------------------------|
| Field Label | Course Duration | Object Name | COURSE |
| Field Name | Course_Duration | Data Type | Number |
| API Name | Course_Duration__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Puja Kumar: 20/11/2024, 6:27 pm | Modified By | Puja Kumar: 20/11/2024, 6:27 pm |

General Options

| | |
|---------------|--------------------------|
| Required | <input type="checkbox"/> |
| Unique | <input type="checkbox"/> |
| External ID | <input type="checkbox"/> |
| AI Prediction | <input type="checkbox"/> |
| Default Value | |

d) Rating

SETUP > OBJECT MANAGER

Course

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

Scoping Rules

Course Custom Field

Rating

[Back to Course](#)
[Help for this Page](#)

[Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)
[Where is this used?](#)

Field Information

| | | | |
|---------------------------|---------------------------------|-------------|---------------------------------|
| Field Label | Rating | Object Name | COURSE |
| Field Name | Rating | Data Type | Picklist |
| API Name | Rating__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Puja Kumar: 20/11/2024, 6:28 pm | Modified By | Puja Kumar: 20/11/2024, 6:28 pm |

General Options

| | |
|---------------|--------------------------|
| Required | <input type="checkbox"/> |
| Default Value | |

Picklist Options

| | |
|--|-------------------------------------|
| Restrict picklist to the values defined in the value set | <input checked="" type="checkbox"/> |
| Controlling Field | |

e) Active

The screenshot shows the 'Active' custom field configuration page. The left sidebar contains a list of configuration options: 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 Grouping Rules. The main content area is titled 'Course Custom Field: Active' and includes a 'Back to Course' link. Below the title are tabs for 'Custom Field Definition Detail', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing a table of field information and a 'General Options' section.

| Field Label | Field Name | Object Name |
|---------------------------|---------------|---------------------|
| Active | Active | Course |
| API Name | Active__c | Data Type |
| Description | | Checkbox |
| Help Text | | |
| Data Owner | | |
| Field Usage | | |
| Data Sensitivity Level | | |
| Compliance Categorization | | |
| Created By | Elisa Kattari | Modified By |
| 20/11/2024, 6:29 pm | | 20/11/2024, 6:29 pm |

General Options

| Default Value | Uncheckbox |
|---------------|------------|
| | |

Field Dependencies

No dependencies defined.

f) Instructor Name

The screenshot shows the 'Instructor Name' custom field configuration page. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Course Custom Field: Instructor Name' and includes a 'Back to Course' link. Below the title are tabs for 'Custom Field Definition Detail', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing a table of field information and a 'General Options' section.

| Field Label | Field Name | Object Name |
|---------------------------|--------------------|---------------------|
| Instructor Name | Instructor Name | Course |
| API Name | Instructor_Name__c | Data Type |
| Description | | Text |
| Help Text | | |
| Data Owner | | |
| Field Usage | | |
| Data Sensitivity Level | | |
| Compliance Categorization | | |
| Created By | Elisa Kattari | Modified By |
| 20/11/2024, 6:34 pm | | 20/11/2024, 6:34 pm |

General Options

| Required | Unique | Case Sensitive | External ID | Default Value |
|--------------------------|--------------------------|--------------------------|--------------------------|---------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

g) Type of Course

The screenshot shows the 'Type of Course' custom field configuration page. The left sidebar is the same as in the previous screenshots. The main content area is titled 'Course Custom Field: Type of Course' and includes a 'Back to Course' link. Below the title are tabs for 'Custom Field Definition Detail', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing a table of field information and a 'General Options' section.

| Field Label | Field Name | Object Name |
|---------------------------|-------------------|---------------------|
| Type of Course | Type of Course | Course |
| API Name | Type_of_Course__c | Data Type |
| Description | | Picklist |
| Help Text | | |
| Data Owner | | |
| Field Usage | | |
| Data Sensitivity Level | | |
| Compliance Categorization | | |
| Created By | Elisa Kattari | Modified By |
| 20/11/2024, 6:36 pm | | 20/11/2024, 6:36 pm |

General Options

| Required | Default Value |
|--------------------------|---------------|
| <input type="checkbox"/> | |

Picklist Options

Restrict picklist to the values defined in the value set ☒

h) Priority

The screenshot shows the 'Priority' custom field configuration page. The left sidebar is the same as in the previous screenshots. The main content area is titled 'Course Custom Field: Priority' and includes a 'Back to Course' link. Below the title are tabs for 'Custom Field Definition Detail', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing a table of field information and a 'General Options' section.

| Field Label | Field Name | Object Name |
|---------------------------|---------------|---------------------|
| Priority | Priority | Course |
| API Name | Priority__c | Data Type |
| Description | | Picklist |
| Help Text | | |
| Data Owner | | |
| Field Usage | | |
| Data Sensitivity Level | | |
| Compliance Categorization | | |
| Created By | Elisa Kattari | Modified By |
| 20/11/2024, 6:40 pm | | 20/11/2024, 6:40 pm |

General Options

| Required | Default Value |
|--------------------------|---------------|
| <input type="checkbox"/> | |

Picklist Options

Restrict picklist to the values defined in the value set ☒

Controlling Field:

i) Start Date

The screenshot shows the 'Course Custom Field' configuration page for 'Start Date'. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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 content area has tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section includes: Field Label (Start Date), Field Name (Start_Date), API Name (Start_Date__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. It also shows 'Created By' and 'Modified By' as Pooja Kumar on 20/11/2024 at 6:43 pm. The 'General Options' section has a 'Required' checkbox (unchecked) and a 'Default Value' field. The 'Validation Rules' section shows 'No validation rules defined' with a 'New' button and a 'Validation Rules Help' link.

j) End Date

The screenshot shows the 'Course Custom Field' configuration page for 'End Date'. The layout is identical to the 'Start Date' page. The 'Field Information' section includes: Field Label (End Date), Field Name (End_Date), API Name (End_Date__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. It also shows 'Created By' and 'Modified By' as Pooja Kumar on 20/11/2024 at 6:45 pm. The 'General Options' section has a 'Required' checkbox (unchecked) and a 'Default Value' field. The 'Validation Rules' section shows 'No validation rules defined' with a 'New' button and a 'Validation Rules Help' link.

B. Subject Fields

a) Subject Name

The screenshot shows the 'Subject Custom Field' configuration page for 'Subject Name'. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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 content area has tabs for 'Set Field-Level Security' and 'View Field Accessibility'. The 'Field Information' section includes: Field Label (Subject Name), Data Type (Text(80)), Description, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. It also shows 'Field Name' as Name. The 'Validation Rules' section shows 'No validation rules defined' with a 'New' button and a 'Validation Rules Help' link.

b) No. of Modules

Subject Custom Field
No. of Modules

Back to Subject

Validation Rules 0

Custom Field Definition Detail

Field Information

| | | | |
|---------------------------|---------------------|-------------|---------------------|
| Field Label | No. of Modules | Object Name | Subject |
| Field Name | No_of_Modules | Data Type | Number |
| API Name | No_of_Modules__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Puja Kumar | Modified By | Puja Kumar |
| | 20/11/2024, 7:17 pm | | 20/11/2024, 7:17 pm |

General Options

| | |
|---------------|--------------------------|
| Required | <input type="checkbox"/> |
| Unique | <input type="checkbox"/> |
| External ID | <input type="checkbox"/> |
| AI Prediction | <input type="checkbox"/> |
| Default Value | |

c) Instructor Name

Subject Custom Field
Instructor Name

Back to Subject

Validation Rules 0

Custom Field Definition Detail

Field Information

| | | | |
|---------------------------|---------------------|-------------|---------------------|
| Field Label | Instructor Name | Object Name | Subject |
| Field Name | Instructor_Name | Data Type | Text |
| API Name | Instructor_Name__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Puja Kumar | Modified By | Puja Kumar |
| | 20/11/2024, 7:24 pm | | 20/11/2024, 7:24 pm |

General Options

| | |
|----------------|--------------------------|
| Required | <input type="checkbox"/> |
| Unique | <input type="checkbox"/> |
| Case Sensitive | <input type="checkbox"/> |
| External ID | <input type="checkbox"/> |
| Default Value | |

d) Rating

Subject Custom Field
Rating

Back to Subject

Validation Rules 0

Custom Field Definition Detail

Field Information

| | | | |
|---------------------------|---------------------|-------------|---------------------|
| Field Label | Rating | Object Name | Subject |
| Field Name | Rating | Data Type | Picklist |
| API Name | Rating__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Puja Kumar | Modified By | Puja Kumar |
| | 20/11/2024, 7:25 pm | | 20/11/2024, 7:25 pm |

General Options

| | |
|---------------|--------------------------|
| Required | <input type="checkbox"/> |
| Default Value | |

Picklist Options

| | |
|--|-------------------------------------|
| Restrict picklist to the values defined in the value set | <input checked="" type="checkbox"/> |
|--|-------------------------------------|

e) Priority

Subject Custom Field
Priority

Back to Subject

Validation Rules 0

Custom Field Definition Detail

Field Information

| | | | |
|---------------------------|---------------------|-------------|---------------------|
| Field Label | Priority | Object Name | Subject |
| Field Name | Priority | Data Type | Picklist |
| API Name | Priority__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Puja Kumar | Modified By | Puja Kumar |
| | 20/11/2024, 7:26 pm | | 20/11/2024, 7:26 pm |

General Options

| | |
|---------------|--------------------------|
| Required | <input type="checkbox"/> |
| Default Value | |

Picklist Options

| | |
|--|-------------------------------------|
| Restrict picklist to the values defined in the value set | <input checked="" type="checkbox"/> |
| Controlling Field | None |

f) Category

The screenshot shows the 'Subject' custom field configuration page in Salesforce Setup. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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 content area is titled 'Subject Custom Field Category' and includes a 'Back to Subject' link. Below the title are tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays: Field Label (Category), Field Name (Category), API Name (Category__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section shows 'Required' as a checkbox and 'Default Value' as a text input. The 'Picklist Options' section shows 'Restrict picklist to the values defined in the value set' as a checked checkbox and 'Controlling Field' as a text input. The 'Created By' and 'Modified By' fields both show 'Pula Kuttal' with a timestamp of 20/11/2024, 7:27 pm.

g) Level

The screenshot shows the 'Subject' custom field configuration page in Salesforce Setup, specifically for the 'Level' field. The left sidebar is identical to the previous screenshot. The main content area is titled 'Subject Custom Field Level' and includes a 'Back to Subject' link. Below the title are tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays: Field Label (Level), Field Name (Level), API Name (Level__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section shows 'Required' as a checkbox and 'Default Value' as a text input. The 'Picklist Options' section shows 'Restrict picklist to the values defined in the value set' as a checked checkbox and 'Controlling Field' as a text input. The 'Created By' and 'Modified By' fields both show 'Pula Kuttal' with a timestamp of 20/11/2024, 7:29 pm.

C. Course Lead Fields

a) First Name

The screenshot shows the 'Course Lead' custom field configuration page in Salesforce Setup. The left sidebar contains navigation links: Setup, Home, Object Manager (selected), and Course Lead. The main content area is titled 'Course Lead Custom Field First Name' and includes a 'Back to Course Lead' link. Below the title are tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays: Field Label (First Name), Field Name (First Name), API Name (First_Name__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section shows 'Required' as a checkbox, 'Unique' as a checkbox, 'Case Sensitive' as a checkbox, 'External ID' as a checkbox, and 'Default Value' as a text input. The 'Created By' and 'Modified By' fields both show 'Pula Kuttal' with a timestamp of 20/11/2024, 7:51 pm.

b) Last Name

SETUP > OBJECT MANAGER
Course Lead

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

Scoping Rules

Course Lead Custom Field
Last Name
[Back to Course Lead](#)

Validation Rules III

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

| | | | |
|---------------------------|---------------------|-------------|---------------------|
| Field Label | Last Name | Object Name | COURSE_LEAD |
| Field Name | Last_Name | Data Type | Text |
| API Name | Last_Name__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Elisa.Sutcliffe | Modified By | Elisa.Sutcliffe |
| | 2011/10/24, 7:52 pm | | 2011/10/24, 7:52 pm |

General Options

Required ☐

Unique ☐

Case Sensitive ☐

External ID ☐

Default Value

c) Phone

Setup Home Object Manager

SETUP > OBJECT MANAGER
Course Lead

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

Scoping Rules

Course Lead Custom Field
Phone
[Back to Course Lead](#)

Validation Rules III

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

| | | | |
|---------------------------|---------------------|-------------|---------------------|
| Field Label | Phone | Object Name | COURSE_LEAD |
| Field Name | Phone | Data Type | Phone |
| API Name | Phone__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Elisa.Sutcliffe | Modified By | Elisa.Sutcliffe |
| | 2011/10/24, 7:50 pm | | 2011/10/24, 7:50 pm |

General Options

Required ☐

Unique ☐

Case Sensitive ☐

External ID ☐

Default Value

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

d) Email

SETUP > OBJECT MANAGER
Course Lead

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

Scoping Rules

Course Lead Custom Field
Email
[Back to Course Lead](#)

Validation Rules III

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

| | | | |
|---------------------------|---------------------|-------------|---------------------|
| Field Label | Email | Object Name | COURSE_LEAD |
| Field Name | Email | Data Type | Email |
| API Name | Email__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Elisa.Sutcliffe | Modified By | Elisa.Sutcliffe |
| | 2011/10/24, 7:53 pm | | 2011/10/24, 7:53 pm |

General Options

Required ☐

Unique ☐

Case Sensitive ☐

External ID ☐

Default Value

e) Source

SETUP > OBJECT MANAGER
Course Lead

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

Scoping Rules

Course Lead Custom Field
Source
[Back to Course Lead](#)

Validation Rules III

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

| | | | |
|---------------------------|---------------------|-------------|---------------------|
| Field Label | Source | Object Name | COURSE_LEAD |
| Field Name | Source | Data Type | Picklist |
| API Name | Source__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Elisa.Sutcliffe | Modified By | Elisa.Sutcliffe |
| | 2011/10/24, 7:56 pm | | 2011/10/24, 7:56 pm |

General Options

Required ☐

Unique ☐

Case Sensitive ☐

External ID ☐

Default Value

Picklist Options

Restrict picklist to the values defined in the value set ☒

[Customize Picklist](#) [About](#)

f) Category

The screenshot shows the 'Course Lead' field definition for 'Category'. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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 content area is titled 'Course Lead Custom Field' and 'Category'. It includes a 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists: Field Label (Category), Field Name (Category), API Name (Category__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section shows 'Required' as a checkbox and 'Default Value' as a text input. The 'Picklist Options' section shows a checkbox for 'Restrict picklist to the values defined in the values set' and a 'Controlling Field' dropdown.

g) Rating

The screenshot shows the 'Course Lead' field definition for 'Rating'. The left sidebar is identical to the previous screenshot. The main content area is titled 'Course Lead Custom Field' and 'Rating'. The 'Custom Field Definition Detail' section has the same tabs. The 'Field Information' table lists: Field Label (Rating), Field Name (Rating), API Name (Rating__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section shows 'Required' as a checkbox and 'Default Value' as a text input. The 'Picklist Options' section shows a checkbox for 'Restrict picklist to the values defined in the values set' and a 'Controlling Field' dropdown.

h) Currency

The screenshot shows the 'Course Lead' field definition for 'Currency'. The left sidebar is identical to the previous screenshots. The main content area is titled 'Course Lead Custom Field' and 'Currency'. The 'Custom Field Definition Detail' section has the same tabs. A yellow warning banner states: 'Multiple currencies are enabled. You must set decimal places for each currency through Manage Currencies instead.' The 'Field Information' table lists: Field Label (Currency), Field Name (Currency), API Name (Currency__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section shows 'Required' as a checkbox and 'Default Value' as a text input. The 'Currency Options' section is visible at the bottom.

i) Course Lead Amount

The screenshot shows the 'Course Lead' field definition for 'Course Lead Amount'. The left sidebar is identical to the previous screenshots. The main content area is titled 'Course Lead Custom Field' and 'Course Lead Amount'. The 'Custom Field Definition Detail' section has the same tabs. A yellow warning banner states: 'Multiple currencies are enabled. You must set decimal places for each currency through Manage Currencies instead.' The 'Field Information' table lists: Field Label (Course Lead Amount), Field Name (Course Lead Amount), API Name (Course_Leas_Amount__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section shows 'Required' as a checkbox and 'Default Value' as a text input. The 'Currency Options' section is visible at the bottom.

D. Technology Fields

a) Name

The screenshot shows the 'Technology' Custom Field Definition for the 'Name' field. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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 content area is titled 'Technology Custom Field' and 'Name'. It includes a 'Back to Technology' link and a 'Validation Rules (0)' button. The 'Custom Field Definition Detail' section has tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details: Field Label (Name), Field Name (Name), API Name (Name__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (Puja Kumari, 20/11/2024, 9:02 pm), and Modified By (Puja Kumari, 20/11/2024, 9:02 pm). The 'General Options' section shows 'Required' (unchecked), 'Unique' (unchecked), 'Case Sensitive' (unchecked), 'External ID' (unchecked), and 'Default Value' (empty). The 'Object Name' is 'Technology' and the 'Data Type' is 'Text'.

b) Type

The screenshot shows the 'Technology' Custom Field Definition for the 'Type' field. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Technology Custom Field' and 'Type'. It includes a 'Back to Technology' link and a 'Validation Rules (0)' button. The 'Custom Field Definition Detail' section has tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details: Field Label (Type), Field Name (Type), API Name (Type__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (Puja Kumari, 20/11/2024, 9:12 pm), and Modified By (Puja Kumari, 20/11/2024, 9:12 pm). The 'General Options' section shows 'Required' (unchecked), 'Default Value' (1), and 'Picklist Options' (checked). The 'Picklist Options' section shows 'Restrict picklist to the values defined in the value set' (checked) and 'Controlling Field' (None). The 'Object Name' is 'Technology' and the 'Data Type' is 'Picklist'.

c) Category

The screenshot shows the 'Technology' Custom Field Definition for the 'Category' field. The left sidebar is the same as in the previous screenshots. The main content area is titled 'Technology Custom Field' and 'Category'. It includes a 'Back to Technology' link and a 'Validation Rules (0)' button. The 'Custom Field Definition Detail' section has tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details: Field Label (Category), Field Name (Category), API Name (Category__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (Puja Kumari, 20/11/2024, 9:15 pm), and Modified By (Puja Kumari, 20/11/2024, 9:15 pm). The 'General Options' section shows 'Required' (unchecked), 'Default Value' (1), and 'Picklist Options' (checked). The 'Picklist Options' section shows 'Restrict picklist to the values defined in the value set' (checked) and 'Controlling Field' (None). The 'Object Name' is 'Technology' and the 'Data Type' is 'Picklist'.

d) Rating

The screenshot shows the 'Rating' custom field configuration page. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Technology Custom Field Rating' and includes a 'Back to Technology' link. Below the title are tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays a table with the following data:

| Field Label | Rating | Object Name | Technology |
|---------------------------|----------------------------------|-------------|----------------------------------|
| Field Name | Rating | Data Type | Picklist |
| API Name | Rating__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Puja Kumari, 20/11/2024, 9:16 pm | Modified By | Puja Kumari, 20/11/2024, 9:16 pm |

The 'General Options' section includes a 'Required' checkbox (unchecked) and a 'Default Value' field (empty). The 'Picklist Options' section includes a 'Restrict picklist to the values defined in the value set' checkbox (checked) and a 'Controlling Field' dropdown menu (set to 'None').

e) Active

The screenshot shows the 'Active' custom field configuration page. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Technology Custom Field Active' and includes a 'Back to Technology' link. Below the title are tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays a table with the following data:

| Field Label | Active | Object Name | Technology |
|---|----------------------------------|-------------|----------------------------------|
| Field Name <th>Active</th> <td>Data Type</td> <td>Checkbox</td> | Active | Data Type | Checkbox |
| API Name <td>Active__c</td> <td></td> <td></td> | Active__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Puja Kumari, 20/11/2024, 9:16 pm | Modified By | Puja Kumari, 20/11/2024, 9:16 pm |

The 'General Options' section includes a 'Default Value' field (set to 'Unchecked'). The 'Field Dependencies' section includes a 'New' button and a message 'No dependencies defined.'.

f) Instructor Name

The screenshot shows the 'Instructor Name' custom field configuration page. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Technology Custom Field Instructor Name' and includes a 'Back to Technology' link. Below the title are tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays a table with the following data:

| Field Label | Instructor Name | Object Name | Technology |
|--|----------------------------------|-------------|----------------------------------|
| Field Name <th>Instructor Name</th> <td>Data Type</td> <td>Text</td> | Instructor Name | Data Type | Text |
| API Name <td>Instructor_Name__c</td> <td></td> <td></td> | Instructor_Name__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Puja Kumari, 20/11/2024, 9:18 pm | Modified By | Puja Kumari, 20/11/2024, 9:18 pm |

The 'General Options' section includes a 'Required' checkbox (unchecked), a 'Unique' checkbox (unchecked), a 'Case Sensitive' checkbox (unchecked), an 'External ID' checkbox (unchecked), and a 'Default Value' field (empty).

g) Mobile

SETUP > OBJECT MANAGER
Technology

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

Scoping Rules

Technology Custom Field
Mobile
[Back to Technology](#)

Validation Rules (0)

[Edit](#) [Set Field Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Custom Field Definition Detail

Field Information

| | | | |
|---------------------------|---------------------|-------------|---------------------|
| Field Label | Mobile | Object Name | Technology |
| Field Name | Mobile | Data Type | Phone |
| API Name | Mobile__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Paige Kuttari | Modified By | Paige Kuttari |
| | 20/11/2024, 9:18 pm | | 20/11/2024, 9:18 pm |

General Options

Required ☐

Default Value

Validation Rules

No validation rules defined. [New](#) [Validation Rules Help](#)

h) Email

SETUP > OBJECT MANAGER
Technology

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

Scoping Rules

Technology Custom Field
Email
[Back to Technology](#)

Validation Rules (0)

[Edit](#) [Set Field Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Custom Field Definition Detail

Field Information

| | | | |
|---------------------------|---------------------|-------------|---------------------|
| Field Label | Email | Object Name | Technology |
| Field Name | Email | Data Type | Email |
| API Name | Email__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Paige Kuttari | Modified By | Paige Kuttari |
| | 20/11/2024, 9:19 pm | | 20/11/2024, 9:19 pm |

General Options

Required ☐

Unique ☐

External ID ☐

Default Value

Validation Rules

No validation rules defined. [New](#) [Validation Rules Help](#)

i) Qualification

SETUP > OBJECT MANAGER
Technology

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

Scoping Rules

Technology Custom Field
Qualification
[Back to Technology](#)

Validation Rules (0)

[Edit](#) [Set Field Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Custom Field Definition Detail

Field Information

| | | | |
|---------------------------|---------------------|-------------|---------------------|
| Field Label | Qualification | Object Name | Technology |
| Field Name | Qualification | Data Type | Text |
| API Name | Qualification__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Paige Kuttari | Modified By | Paige Kuttari |
| | 20/11/2024, 9:20 pm | | 20/11/2024, 9:20 pm |

General Options

Required ☐

Unique ☐

Case Sensitive ☐

External ID ☐

Default Value

j) Availability

SETUP > OBJECT MANAGER
Technology

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

Scoping Rules

Technology Custom Field
Availability
[Back to Technology](#)

Validation Rules (0)

[Edit](#) [Set Field Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Custom Field Definition Detail

Field Information

| | | | |
|---------------------------|---------------------|-------------|---------------------|
| Field Label | Availability | Object Name | Technology |
| Field Name | Availability | Data Type | Picklist |
| API Name | Availability__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Paige Kuttari | Modified By | Paige Kuttari |
| | 20/11/2024, 9:20 pm | | 20/11/2024, 9:20 pm |

General Options

Required ☐

Default Value

Picklist Options

Restrict picklist to the values defined in the value set ☒

Controlling Field [New](#)

3. Add Validation Rules for verifying data:

a. Add validation rule for every field to verify that the fields are not empty for the objects:

- Course

Information

* Course Name

Physics

No. of Modules

Required fields are missing: [No_of_Modules_c, Rating_c, Instructor_Name_c, Type_of_Course_c, Priority_c, Start_Date_c, End_Date_c]

* Course Duration

30

Rating

--None--

Required fields are missing: [No_of_Modules_c, Rating_c, Instructor_Name_c, Type_of_Course_c, Priority_c, Start_Date_c, End_Date_c]

Active

Owner

Puja Kumari

Currency

INR - Indian Rupee

Cancel Save & New Save

- Subject

Information

* Subject Name

English

* No. of Modules

5

* Instructor Name

Complete this field.

* Rating

--None--

Complete this field.

* Priority

--None--

Complete this field.

* Category

--None--

Complete this field.

* Level

--None--

Complete this field.

Owner

Puja Kumari

Currency

INR - Indian Rupee

We hit a snag.

Review the following fields

- Instructor Name
- Rating
- Priority
- Category
- Level

Cancel Save & New Save

- **Course Leads**

The screenshot shows the 'New Course Lead' form in a web application. The form is titled 'New Course Lead' and includes a legend indicating that an asterisk (*) denotes required information. The form fields are organized into an 'Information' section. The 'Course Lead Name' field is empty and has a red border with the text 'Complete this field.' below it. The 'First Name' field contains the text 'Puja'. The 'Last Name' field is empty. The 'Phone' field is empty. The 'Email' field is empty. The 'Source' field is empty. The 'Currency' dropdown menu is set to 'INR - Indian Rupee'. The 'Owner' field shows a profile picture and the name 'Puja Kumari'. A red error message box is overlaid on the form, stating 'We hit a snag.' and listing the following fields for review: Course Lead Name, Last Name, Phone, Email, Source, Category, Rating, Currency, and Course Lead Amount. The 'Save' button is disabled, and the 'Cancel' and 'Save & New' buttons are visible.

Course Leads

New Course Lead

New Course Lead

* = Required Information

Information

* Course Lead Name

Owner

Puja Kumari

Complete this field.

* First Name

Puja

Currency

INR - Indian Rupee

* Last Name

Complete this field.

* Phone

Complete this field.

* Email

Complete this field.

* Source

None

We hit a snag.

Review the following fields

- [Course Lead Name](#)
- [Last Name](#)
- [Phone](#)
- [Email](#)
- [Source](#)
- [Category](#)
- [Rating](#)
- [Currency](#)
- [Course Lead Amount](#)

Cancel Save & New Save

- **Technology**

The screenshot shows the 'New Technology' form in a web application. The form is titled 'New Technology' and includes a legend indicating that an asterisk (*) denotes required information. The form fields are organized into an 'Information' section. The 'Technology Name' field is empty and has a red border with the text 'Complete this field.' below it. The 'Name' field contains the text 'Puja'. The 'Type' field is empty. The 'Category' field is empty. The 'Rating' field is empty. The 'Instructor Name' field is empty. The 'Mobile' field is empty. The 'Email' field is empty. The 'Qualification' field is empty. The 'Availability' field is empty. The 'Currency' dropdown menu is set to 'INR - Indian Rupee'. The 'Owner' field shows a profile picture and the name 'Puja Kumari'. A red error message box is overlaid on the form, stating 'We hit a snag.' and listing the following fields for review: Technology Name, Type, Category, Rating, Instructor Name, Mobile, Email, Qualification, and Availability. The 'Save' button is disabled, and the 'Cancel' and 'Save & New' buttons are visible.

Technologies

New Technology

New Technology

* = Required Information

Information

* Technology Name

Owner

Puja Kumari

Complete this field.

* Name

Puja

Currency

INR - Indian Rupee

* Type

--None

Complete this field.

* Category

--None

Complete this field.

* Rating

--None

Complete this field.

* Instructor Name

--None

Complete this field.

* Mobile

--None

Complete this field.

* Email

--None

Complete this field.

* Qualification

--None

Complete this field.

* Availability

--None

Complete this field.

Active

☒

We hit a snag.

Review the following fields

- [Technology Name](#)
- [Type](#)
- [Category](#)
- [Rating](#)
- [Instructor Name](#)
- [Mobile](#)
- [Email](#)
- [Qualification](#)
- [Availability](#)

Cancel Save & New Save

4. Set Workflow rules for all the custom objects created.

Courses

Workflow Rule

High Priority Course

Help for this Page

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

EditCloneDeactivate

| | | | |
|---------------|-------------------------------------|---------------------|--|
| Rule Name | High Priority Course | Object | Course |
| 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 | | | |
| Rule Criteria | Course: Priority EQUALS High | | |
| Created By | Puja Kumari, 21/11/2024, 1:36 pm | Modified By | Puja Kumari, 21/11/2024, 1:39 pm |

Workflow Actions

Edit

Immediate Workflow Actions

| Type | Description |
|--------------|--------------------|
| Field Update | Update Course Name |

Time-Dependent Workflow Actions

[See an example](#)

Sales Console

Courses

High PrioritySalesfor...

High Priority Salesfor...

Course

High Priority Salesforce Admin

New ContactEditNew Opportunity

Related

Details

| | |
|-------------------------------------|--------------------|
| Course Name | Owner |
| High Priority Salesforce Admin | Puja Kumari |
| No. of Modules | Currency |
| 6 | INR - Indian Rupee |
| Course Duration | |
| 30 | |
| Rating | |
| Excellent | |
| Active | |
| <input checked="" type="checkbox"/> | |
| Instructor Name | |
| Vikash | |
| Type of Course | |
| Online | |
| Priority | |
| High | |
| Start Date | |
| 05/11/2024 | |

Activity

Filters: All time • All activities • All types

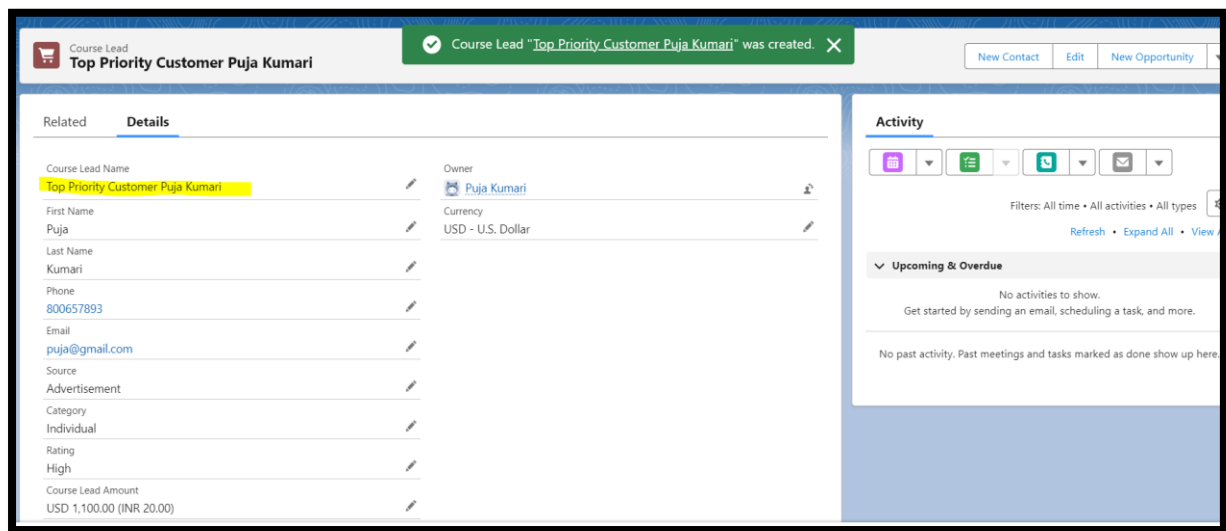
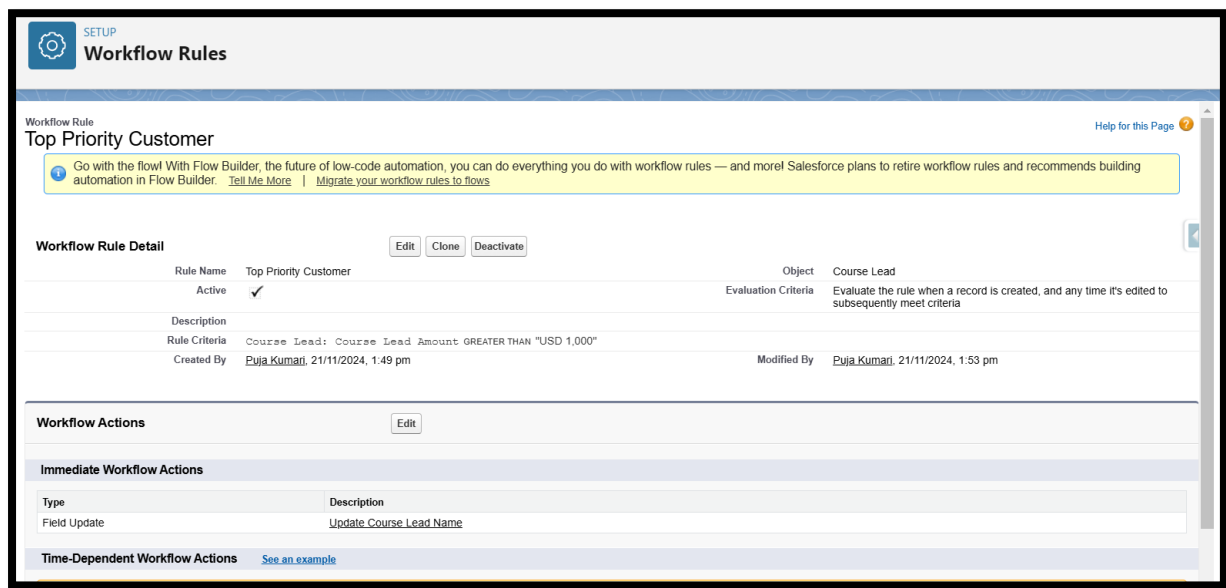
Refresh • Expand All • View All

Upcoming & Overdue

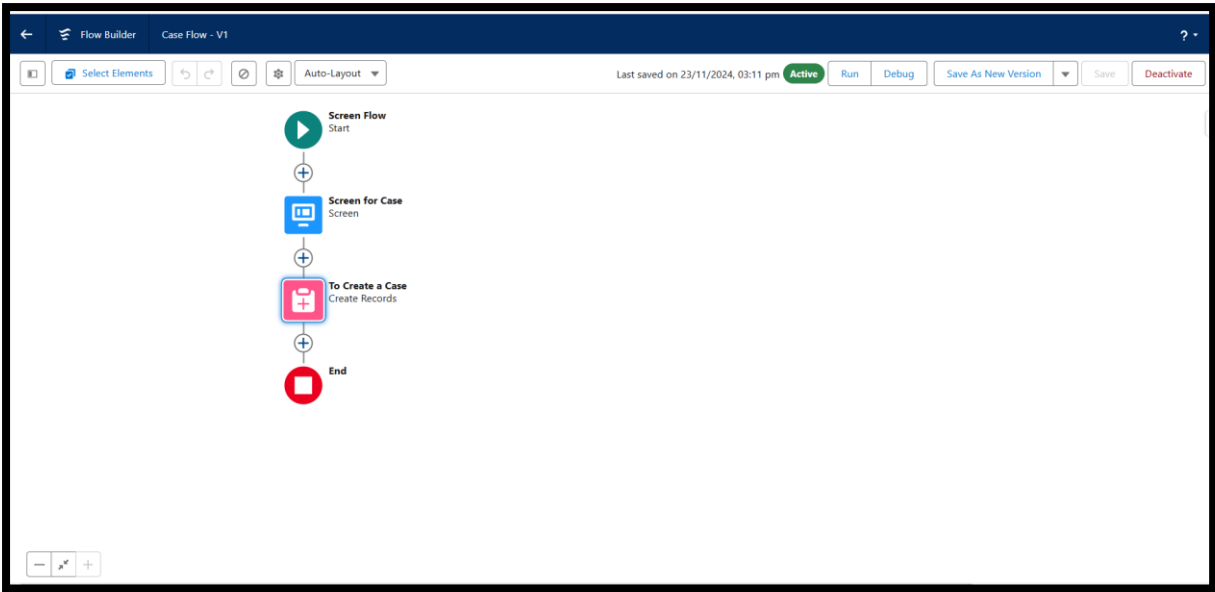
No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Course Lead Amount



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



Case Flow

Name

First Name

Last Name

Phone

Email

Subject

Course Enrolled

Instructor Name

Query Description

Next

Sales Console

Course Leads Top Priority Customer... Recently Viewed | Case 00001030 | Case

Cases Recently Viewed

6 items • Updated a few seconds ago

Search this list...

| | Case Number | Subject | Status | Date/Time Opened | Case Owner Alias | |
|---|-------------|--|--------|---------------------|------------------|--|
| 1 | 00001032 | Issue | New | 23/11/2024, 3:11 pm | PKuma | |
| 2 | 00001030 | Query related Product | Closed | 06/11/2024, 9:12 pm | PKuma | |
| 3 | 00001014 | Delay in installation; spare parts unavailable | Closed | 24/10/2024, 1:48 pm | PKuma | |
| 4 | 00001031 | | Closed | 10/11/2024, 4:44 pm | PKuma | |
| 5 | 00001028 | | New | 06/11/2024, 6:42 pm | scarl | |
| 6 | 00001026 | | New | 05/11/2024, 5:46 pm | PKuma | |

Case Assignment Rule

Case Assignment Rule 2

Help for this Page

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 2

Active

✓

Created By

Puja Kumari, 23/11/2024, 3:21 pm

Modified By

Puja Kumari, 23/11/2024, 3:22 pm

Rule Entries

New

Reorder

| Action | Order | Criteria | Assign To | Email |
|-----------------------|-------|-------------------------|----------------|--------------------------|
| <div>Edit Del</div> | 1 | Case: Status EQUALS New | Customer Agent | <input type="checkbox"/> |

SETUP

Workflow Rules

Edit Rule Case Rule

Help for this Page

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: Status EQUALS Closed

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 |
|--------------------------|-------------|---|
| <div>Edit Remove</div> | Email Alert | Case is Closed so updating as Case Resolved |

Add Actions

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