

Project Title: **SALESFORCE PROJECT READY**

DAY 3:

Topic: Profiles, Recordtypes, Automation

Milestone / Activities:

1. Creating Global Picklist Value Sets
2. Creating Field Dependencies
3. Creating Validation Rules
4. Process Automation

1. Creating Global Picklist Value Sets:

Detailed Description:

A.) College

From Setup, enter Picklist in the Quick Find box, then select Picklist Value Sets. Next to Global Value Sets, click New. Enter College as label for the global value set. This name appears in Setup, and when users create a picklist based on this global value set. To tell users what these values are for, can give specific description of the global value set. Next we enter the values, one per line.

Picklist Value Name	Values
College	MIT-HYD MIT-BLR MIT-MUM MIT-MAA MIT-DEL MIT-CCU

Optionally choose to sort the values alphabetically or to use the first value in the list as the default value, or both. If you select both options, Click Save.

b.) Paper 1

From Setup, enter Picklist in the Quick Find box, then select Picklist Value Sets. Next to Global Value Sets, click New. Enter Paper 1 as label for the global value set. This name appears in Setup, and when users create a picklist based on this global value set. To tell users what these values are for, can give specific description of the global value set. Next we enter the values, one per line.

Picklist Value Name	Values
Paper 1	APEX JAVA C C++

Optionally choose to sort the values alphabetically or to use the first value in the list as the default value, or both. If you select both options, Click Save.

c.) Paper 2

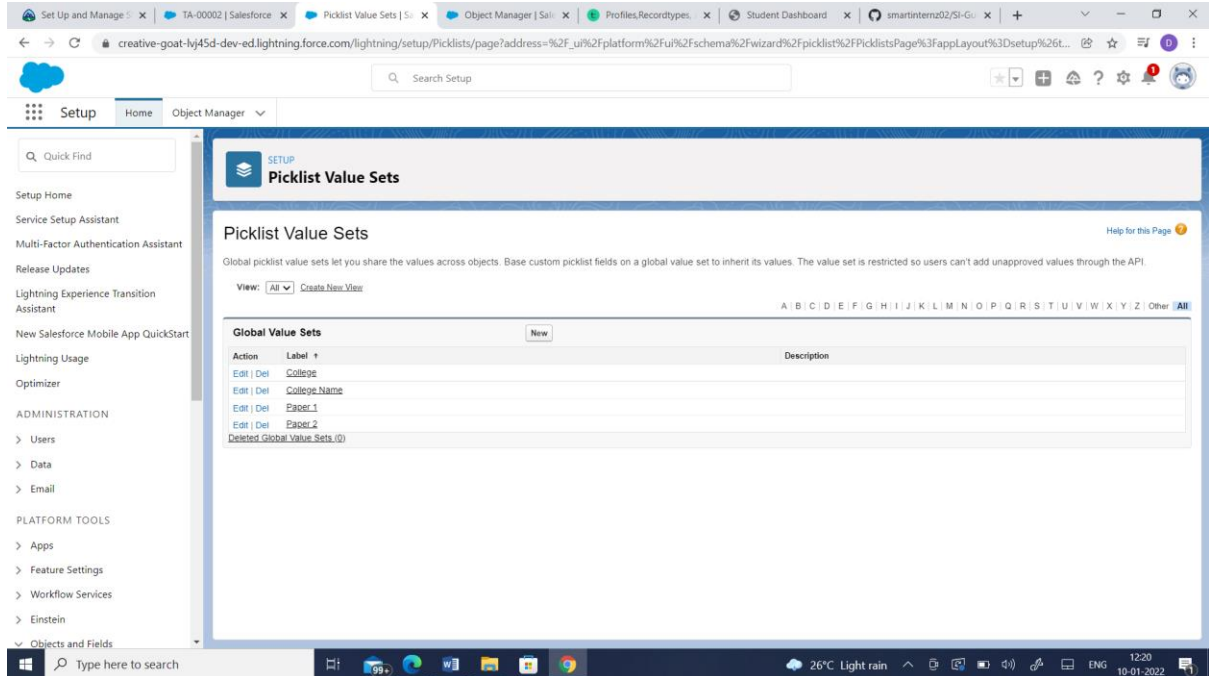
From Setup, enter Picklist in the Quick Find box, then select Picklist Value Sets. Next to Global Value Sets, click New. Enter Paper 2 as label for the global value set. This name appears in Setup, and when users create a picklist based on this global value set. To tell users what these values are for, can give specific description of the global value set. Next we enter the values, one per line.

Picklist Value Name	Values
Paper 2	MATHEMATICS ENGLISH STATISTICS

Optionally choose to sort the values alphabetically or to use the first value in the list as the default value, or both. If you select both options, Click Save.

Outcome:

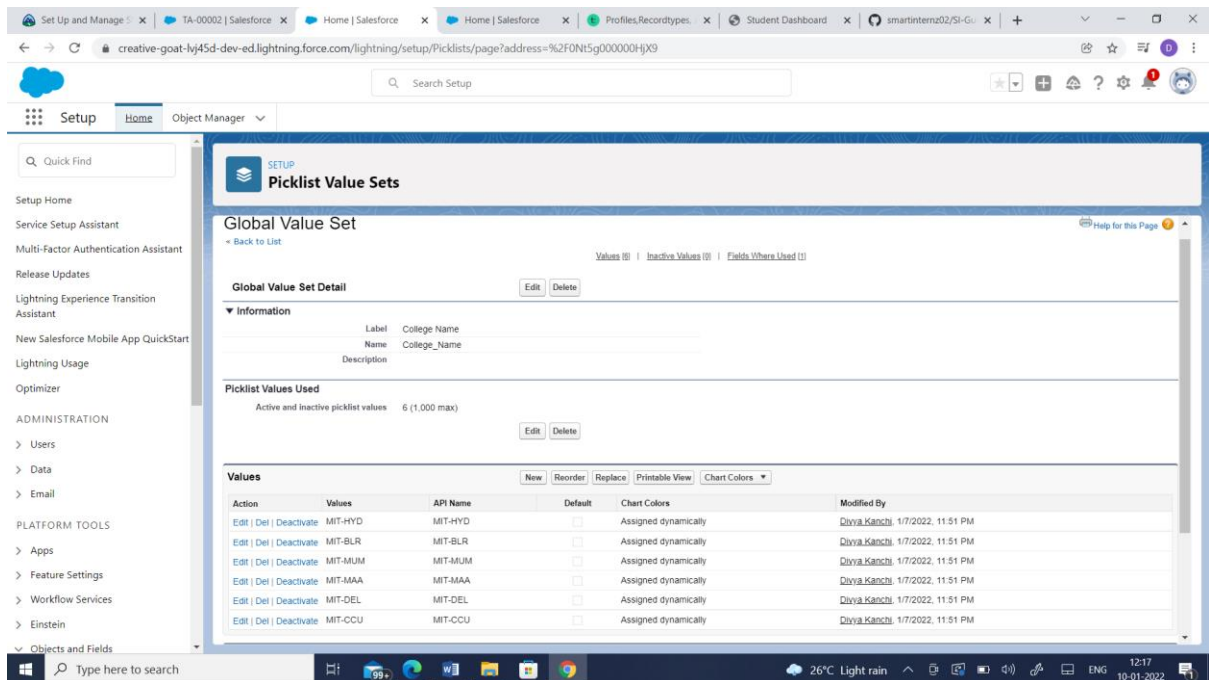
List of Global Picklist Value Sets created:



The screenshot shows the Salesforce Setup interface for Picklist Value Sets. The left sidebar contains navigation links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, and ADMINISTRATION (Users, Data, Email). The main content area displays the 'Picklist Value Sets' page with a 'Global Value Sets' table. The table has columns for Action, Label, and Description. The following table represents the data shown in the screenshot:

Action	Label	Description
Edit Del	College	
Edit Del	College Name	
Edit Del	Paper 1	
Edit Del	Paper 2	
Deleted Global Value Sets (0)		

College :



The screenshot shows the 'Global Value Set Detail' page for the 'College' picklist. The page includes sections for 'Information' and 'Picklist Values Used'. The 'Information' section shows the Label as 'College Name' and the Name as 'College_Name'. The 'Picklist Values Used' section shows 6 active and inactive picklist values. The 'Values' table lists the following data:

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	MIT-HYD	MIT-HYD	<input type="checkbox"/>	Assigned dynamically	Divya Kanchi 1/7/2022, 11:51 PM
Edit Del Deactivate	MIT-BLR	MIT-BLR	<input type="checkbox"/>	Assigned dynamically	Divya Kanchi 1/7/2022, 11:51 PM
Edit Del Deactivate	MIT-MUM	MIT-MUM	<input type="checkbox"/>	Assigned dynamically	Divya Kanchi 1/7/2022, 11:51 PM
Edit Del Deactivate	MIT-MAA	MIT-MAA	<input type="checkbox"/>	Assigned dynamically	Divya Kanchi 1/7/2022, 11:51 PM
Edit Del Deactivate	MIT-DEL	MIT-DEL	<input type="checkbox"/>	Assigned dynamically	Divya Kanchi 1/7/2022, 11:51 PM
Edit Del Deactivate	MIT-CCU	MIT-CCU	<input type="checkbox"/>	Assigned dynamically	Divya Kanchi 1/7/2022, 11:51 PM

Paper 1:

The screenshot shows the Salesforce Setup interface for 'Picklist Value Sets'. The left sidebar contains navigation links for 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, Workflow Services, Einstein), and Objects and Fields. The main content area is titled 'Picklist Value Sets' and shows the 'Global Value Set' for 'Paper 1'. The 'Information' section displays the label 'Paper 1' and name 'Paper_1'. The 'Picklist Values Used' section shows 4 active and inactive picklist values. The 'Values' table lists the following data:

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	APEX	APEX	<input type="checkbox"/>	Assigned dynamically	Divya.Kanchari, 1/7/2022, 11:55 PM
Edit Del Deactivate	JAVA	JAVA	<input type="checkbox"/>	Assigned dynamically	Divya.Kanchari, 1/7/2022, 11:55 PM
Edit Del Deactivate	C	C	<input type="checkbox"/>	Assigned dynamically	Divya.Kanchari, 1/7/2022, 11:55 PM
Edit Del Deactivate	C++	C++	<input type="checkbox"/>	Assigned dynamically	Divya.Kanchari, 1/7/2022, 11:55 PM

The 'Inactive Values' section is currently empty.

Paper 2:

The screenshot shows the Salesforce Setup interface for 'Picklist Value Sets'. The left sidebar contains navigation links for 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, Workflow Services, Einstein), and Objects and Fields. The main content area is titled 'Picklist Value Sets' and shows the 'Global Value Set' for 'Paper 2'. The 'Information' section displays the label 'Paper 2' and name 'Paper_2'. The 'Picklist Values Used' section shows 3 active and inactive picklist values. The 'Values' table lists the following data:

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	MATHEMATICS	MATHEMATICS	<input type="checkbox"/>	Assigned dynamically	Divya.Kanchari, 1/7/2022, 11:57 PM
Edit Del Deactivate	ENGLISH	ENGLISH	<input type="checkbox"/>	Assigned dynamically	Divya.Kanchari, 1/7/2022, 11:57 PM
Edit Del Deactivate	STATISTICS	STATISTICS	<input type="checkbox"/>	Assigned dynamically	Divya.Kanchari, 1/7/2022, 11:57 PM

The 'Inactive Values' section shows 'No Inactive Values values defined'.

2. Creating Field Dependencies

A.) Create field dependency between college Name and Email, where the controlling field is college Name and dependent field is Email. Select the email ids according to the college names.

Detailed Description:

In the College object in the Object Manager, select Fields & Relationships. Click Field Dependencies. Followed by Click New. Then we select the **College Name** as the Controlling Field and **Email** as the Dependent Field. Click Continue. Select the appropriate Email in each column by double-clicking them.

College Name	Email
MIT-HYD	hyd@mit.co.in
MIT-BLR	blr@mit.co.in
MIT-MUM	mum@mit.co.in
MIT-MAA	maa@mit.co.in
MIT-DEL	del@mit.co.in
MIT-CCU	ccu@mit.co.in

Click Preview, then test the dependency by selecting different colleges and viewing the different emails available for each college. Click Close to close the preview window. Click Save.

B.) Create field dependency between college Name and capacity of students, where the controlling field is college Name and dependent field is Capacity of Students. Select the values according to your wish.

Detailed Description:

In the College object in the Object Manager, select Fields & Relationships. Click Field Dependencies. Followed by Click New. Then we select the **College Name** as the Controlling Field and **Capacity of Students** as the Dependent Field. Click Continue. Select the appropriate Capacity of Students in each column by double-clicking them.

College Name	Capacity of Students
MIT-HYD	500-1000
MIT-BLR	1000-2500
MIT-MUM	2500-6000
MIT-MAA	2500-6000
MIT-DEL	6000-10000
MIT-CCU	6000-10000

Click Preview, then test the dependency by selecting different colleges and viewing the range of capacity available for each college. Click Close to close the preview window. Click Save.

Outcome :

Field Dependencies between College Name and Email:

The screenshot shows the Salesforce Object Manager interface for the 'College' object. The 'Fields & Relationships' tab is selected, and the 'Field Dependencies' section is visible. The table below shows the dependencies between the 'College Name' (Controlling Field) and 'Email' (Dependent Field).

Controlling Field	Dependent Field
College Name	Email

Instructions:

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend:

- Excluded Value
- Included Value

Click button to include or exclude selected values from the dependent picklist:

Showing Columns: 1 - 5 (of 6) < Previous | Next > View All | Go to

College Name:	MIT-HYD	MIT-BLR	MIT-MUM	MIT-MAA	MIT-DEL
Email:	hyd@mit.co.in	blr@mit.co.in	mum@mit.co.in	maa@mit.co.in	del@mit.co.in

Showing Columns: 1 - 5 (of 6) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

Include Values | Exclude Values

Field Dependences between College Name and Capacity of Students:

SETUP > OBJECT MANAGER
College

Edit Field Dependency

Controlling Field: College Name
Dependent Field: Capacity Of Students

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Click button to include or exclude selected values from the dependent picklist:

Include Values | Exclude Values

College Name:	MIT-HYD	MIT-BLR	MIT-BRM	MIT-MAA	MIT-DEL
Capacity Of Students:	500-1000	500-1000	500-1000	500-1000	500-1000
	1000-2500	1000-2500	1000-2500	1000-2500	1000-2500
	2500-6000	2500-6000	2500-6000	2500-6000	2500-6000
	6000-10000	6000-10000	6000-10000	6000-10000	6000-10000

Showing Columns: 1 - 5 (of 6) < Previous | Next > View All | Go to

Click button to include or exclude selected values from the dependent picklist:

Include Values | Exclude Values

SETUP > OBJECT MANAGER
College

College Field Dependencies

[Back to Custom Object: College](#)

This page allows you to define dependencies between fields (e.g., dependent picklists).

Field Dependencies

Action	Controlling Field	Dependent Field	Modified By
Edit Del	College Name	Email	Olivia_Kanich 1/8/2022, 4:53 AM
Edit Del	College Name	Capacity Of Students	Olivia_Kanich 1/8/2022, 4:57 AM

3. Creating Validation Rules

A.) Create a validation rule on the college object such that the college name and record info should have the same name.

Detailed Description:

In the College Object, click Validation Rules that is located on the left sidebar. Click New.

Enter the following properties for your validation rule:

- a. Rule Name: College_Name_Validaton
- b. Error Condition Formula:

`TEXT(College_Name__c) <> Name`

- c. Error Message: College name and Record info must be same.

To check your formula for errors, click Check Syntax. Click Save to finish.

B.) Create a validation rule on the application form object to stop any modification on the application form once a student record is created.

Detailed Description:

In the Application From Object, click Validation Rules that is located on the left sidebar. Click New.

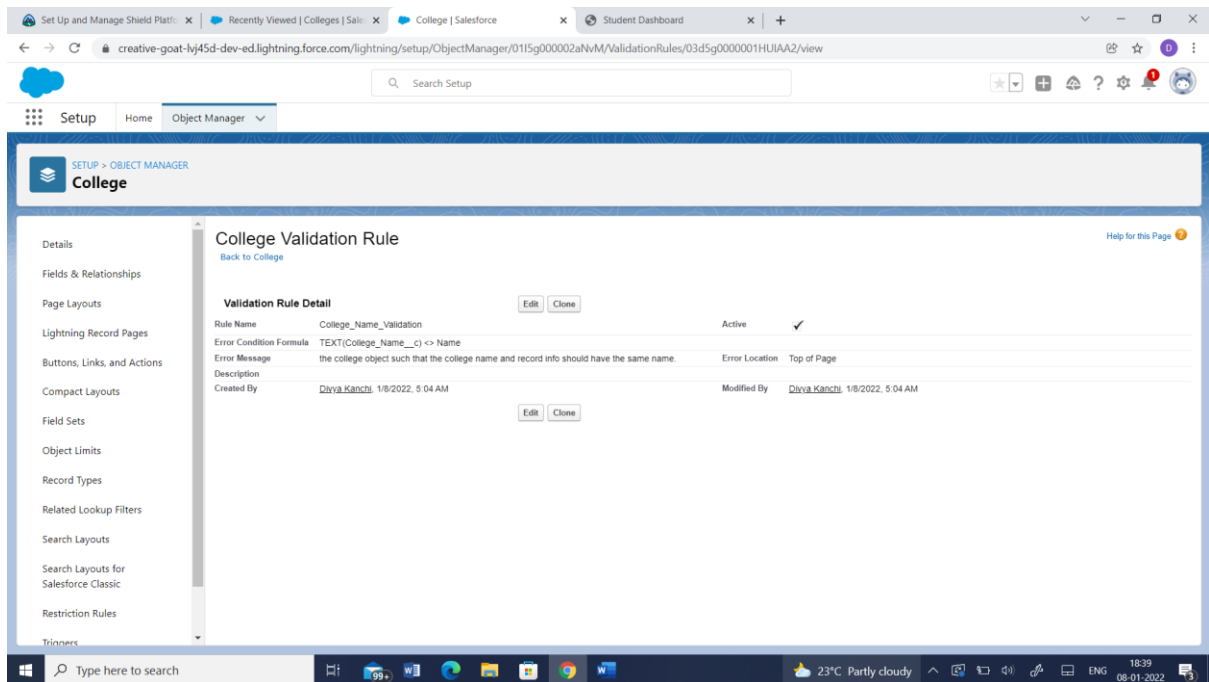
Enter the following properties for your validation rule:

- a. Rule Name: Application_Form_Validaton
- b. Error Condition Formula:

`AND(Ready_To_Join__c == true ,
OR
ISCHANGED(Address__c) ,
ISCHANGED(College__c) ,
ISCHANGED(Date_Of_Birth__c) ,
ISCHANGED(Email__c) ,
ISCHANGED(Guardian_Name__c) ,
ISCHANGED(Phone__c)
)
)`

To check your formula for errors, click Check Syntax. Click Save to finish.

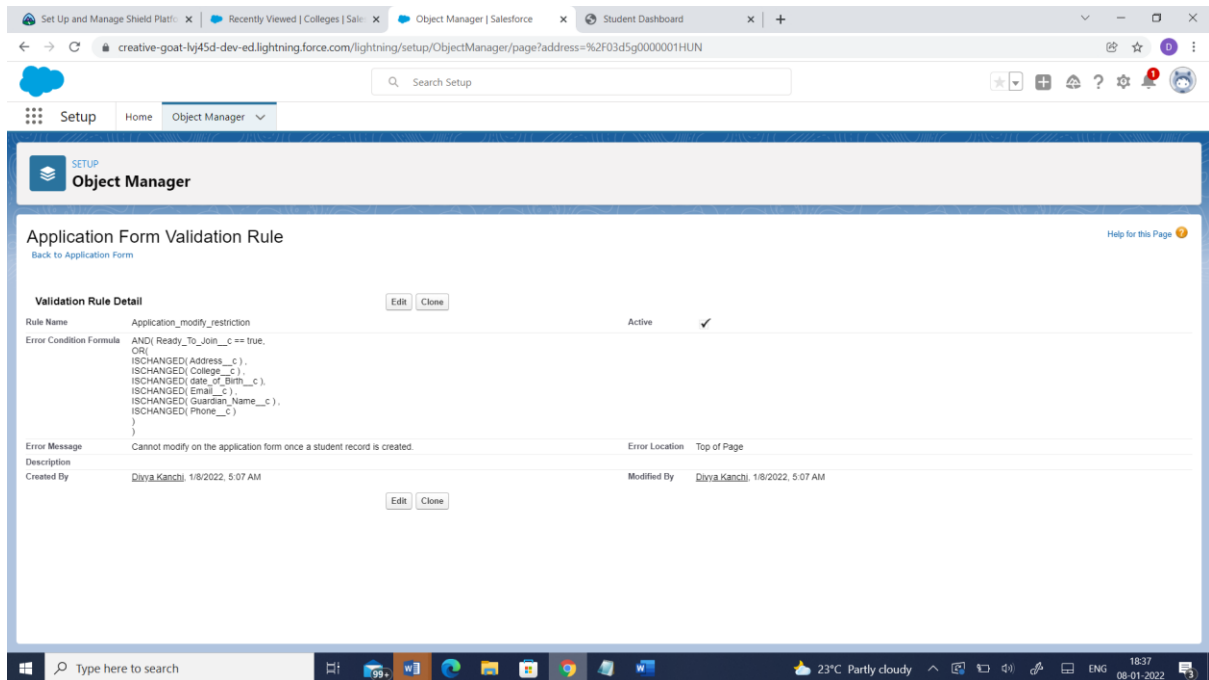
Outcome:



The screenshot shows the Salesforce Setup interface for the 'College' object. 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, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, and Restriction Rules. The main content area is titled 'College Validation Rule' and includes a 'Back to College' link. Below the title is a 'Validation Rule Detail' section with the following information:

Validation Rule Detail		Active
Rule Name	College_Name_Validation	✓
Error Condition Formula	TEXT(College_Name__c) <> Name	
Error Message	the college object such that the college name and record info should have the same name.	
Error Location	Top of Page	
Description		
Created By	Divya Kanchi	1/8/2022, 5:04 AM
Modified By	Divya Kanchi	1/8/2022, 5:04 AM

At the bottom of the page, there is a Windows taskbar showing the system clock as 18:39 on 08-01-2022, and the weather as 23°C Partly cloudy.



The screenshot shows the Salesforce Setup interface for the 'Application Form' object. 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, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, and Restriction Rules. The main content area is titled 'Application Form Validation Rule' and includes a 'Back to Application Form' link. Below the title is a 'Validation Rule Detail' section with the following information:

Validation Rule Detail		Active
Rule Name	Application_modify_restriction	✓
Error Condition Formula	AND(Ready_To_Join__c == true, OR(ISCHANGED(Address__c), ISCHANGED(College__c), ISCHANGED(date_of_Birth__c), ISCHANGED(Email__c), ISCHANGED(Guardian_Name__c), ISCHANGED(Phone__c)))	
Error Message	Cannot modify on the application form once a student record is created.	
Error Location	Top of Page	
Description		
Created By	Divya Kanchi	1/8/2022, 5:07 AM
Modified By	Divya Kanchi	1/8/2022, 5:07 AM

At the bottom of the page, there is a Windows taskbar showing the system clock as 18:37 on 08-01-2022, and the weather as 23°C Partly cloudy.

4. Process Automation

A.) Create an automation process such that when the "ready to join" field is checked on the application form object we need to create the student record automatically with the information specified in the application form record.

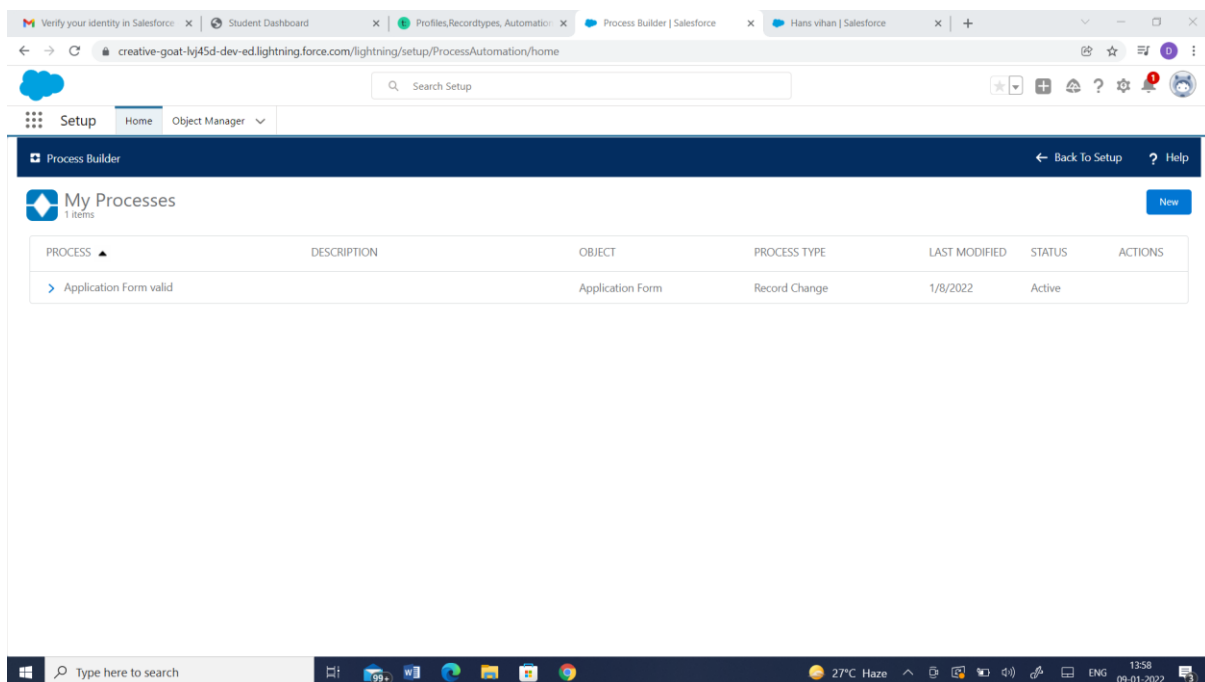
Detailed Description:

Initially Go to Setup, select "Process Builder" from quick find. Create a Process Builder on the "Application Form" object with a condition as "When a record change". And select "When a record is created or edited".

- In the diamond shape box (called nodes), select the criteria which trigger the Process builder to fire. In our example, it is "When **Ready to Join** field is checked."
- Once the node is setup, click on the adjacent box called "Immediate action". And select create a record on the student object.

OutCome:

New Process : Application Form Validation

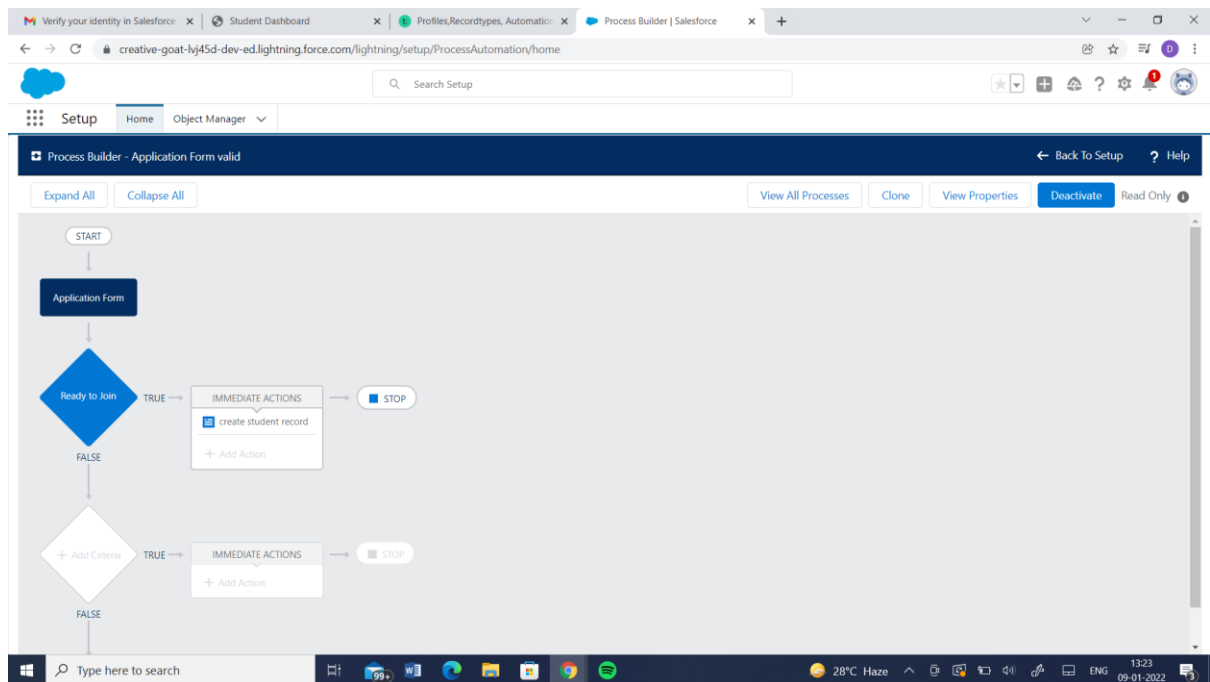


The screenshot displays the Salesforce Process Builder interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Process Builder' section is active, showing 'My Processes' with 1 item. A table lists the process:

PROCESS	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS
> Application Form valid		Application Form	Record Change	1/8/2022	Active	

The interface includes a search bar at the top and a Windows taskbar at the bottom showing the date as 09-01-2022 and time as 13:58.

Process flow:



New Application Form Creation:

The screenshot shows the Salesforce interface for viewing a student's details. The top navigation bar includes 'College', 'Accounts', 'Contacts', 'Colleges', 'Application Forms', 'Students', and 'Subjects'. The main content area is titled 'Student Hans vihan' and is divided into two sections: 'Details' and 'Activity'. The 'Details' section lists various fields for the student, including Name, Address, Application Form (TA-00001), Date Of Birth (1/25/2000), Guardian Name (Hans), Phone ((908) 790-8710), College Name (MIT-MUM), and Created By (Divya Kanchi, 1/9/2022, 12:18 AM). The 'Activity' section on the right shows options for 'New Event', 'New Task', 'Log a Call', and 'Email', along with a search bar and filters. Below this, there is a section for 'Upcoming & Overdue' activities, which currently shows 'No next steps' and 'No past activity'. The bottom of the screen features a Windows taskbar with system information like '27°C Haze' and the date '09-01-2022'.

Student Record Created when Ready to join value is true:

The screenshot displays a Salesforce interface for an 'Application Form' record with ID 'TA-00001'. The breadcrumb navigation shows the path: College > Accounts > Contacts > Colleges > Application Forms > Students > Subjects. The main content area is divided into two sections: 'Related' and 'Activity'.

Related Section:

- Notes & Attachments (0):** Includes an 'Upload Files' button and a text prompt 'Or drop files'.
- Students (1):** A table listing one student, 'Hans vihan', with a 'View All' link at the bottom.

Activity Section:

- Buttons for 'New Event', 'New Task', 'Log a Call', and 'Email'.
- A text input field with the placeholder 'Set up an event...' and an 'Add' button.
- Filters: 'All time • All activities • All types'.
- Upcoming & Overdue:** A section indicating 'No next steps' and 'No past activity'.

The bottom of the image shows a Windows taskbar with the search bar, task icons, system tray (28°C Haze, 13:48, 09-01-2022), and language (ENG).