

Project Title: **SALESFORCE PROJECT READY**

DAY 4:

Topic: Automation, Security and sharing, overview of apex

Milestone / Activities: Create the Student Record Using Flow

Detailed Description:

For the task to create the Student Record using flow, create a new Record-Triggered flow for the Application form object whose records trigger the flow when they're updated with the condition "**Ready to join value equals to true**". In the flow initially, a new resource variable of name "studentVar" with data type record is created on student object. Followed by assign student record data for which each variable is modified by the operator and value combination.

Following are the variables modified by the operator and value combination:

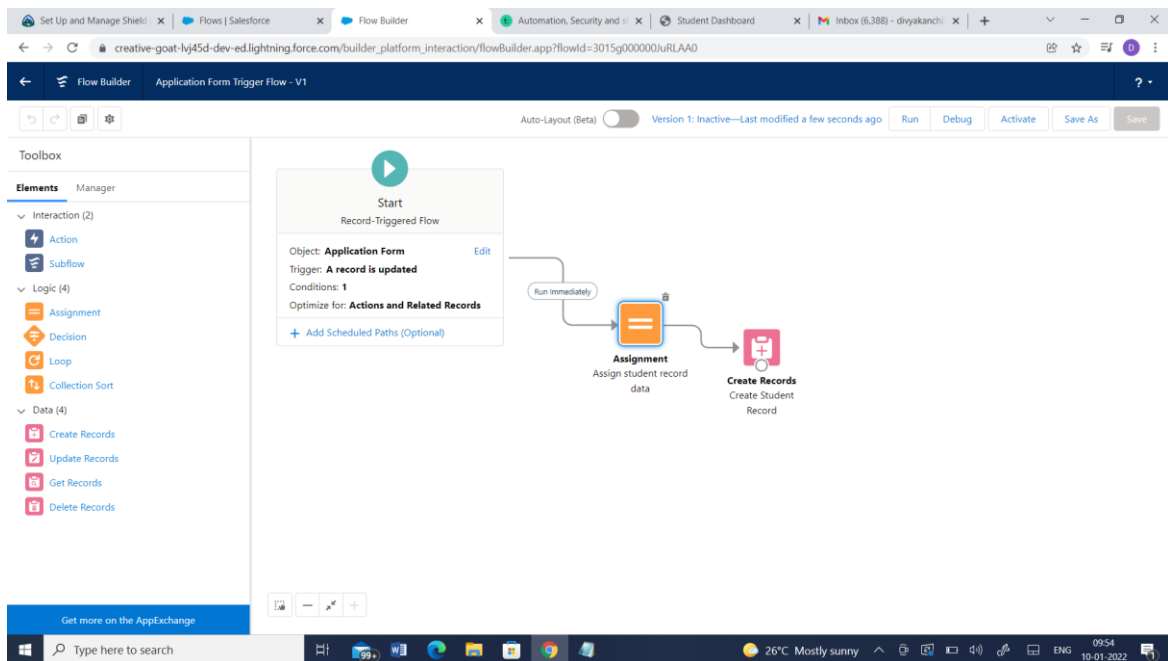
Variable	Operator	Value
{!studentVar.Address__c}	Equals	{!\$Record.Address__c}
{!studentVar.Application_Form__c}	Equals	{!\$Record.Id}
{!studentVar.College_Name__c}	Equals	{!\$Record.College__c}
{!studentVar.Date_Of_Birth__c}	Equals	{!\$Record.date_of_Birth__c}
{!studentVar.Guardian_Name__c}	Equals	{!\$Record.Guardian_Name__c}
{!studentVar.Phone__c}	Equals	{!\$Record.Phone__c}

{!studentVar.Name}	Equals	{!\$Record.Student_Name__c}
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Followed by add creation of new student record for the values on the studentVar variable and finally activate the flow by naming it.

Outcome:

1. Flow for Student Record creation



2. Filling New application form to check the creation of student record when “ready to join” is set to true.

The screenshot shows a Salesforce interface with the following details:

- Application Form Number:** TA-00002
- Application Form ID:** F-000002
- Address:** Visakhapatnam
- College:** MIT-MUM
- College Fees:** \$80,000.00
- Hostel Fees:** \$87,000.00
- date of Birth:** 1/25/2000
- Email:** s@gmail.com
- Guardian Name:** Shan
- Looking For Hostel Stay:** ☐
- Ready To Join:** ☒
- Student Name:** sitara

The right sidebar shows the **Activity** section with tabs for New Event, New Task, Log a Call, and Email. It includes a search bar, filters (All time, All activities, All types), and a section for **Upcoming & Overdue** with the message: "No next steps. To get things moving, add a task or set up a meeting. No past activity. Past meetings and tasks marked as done show up here."

3. The student record is created in the Application Form.

The screenshot shows the same Salesforce interface, but with the **Related** section expanded. It displays the following information:

- Notes & Attachments (0):** Includes an "Upload Files" button and a message "Or drop files".
- Students (1):** Shows a list of related student records. The first record is "sitara" with a "View All" link.

The right sidebar remains the same, showing the **Activity** section with the same tabs and filters.