

PS ID:10828637

Name: PANUGANTI TANUSRI

WEEKLY ASSESSMENT

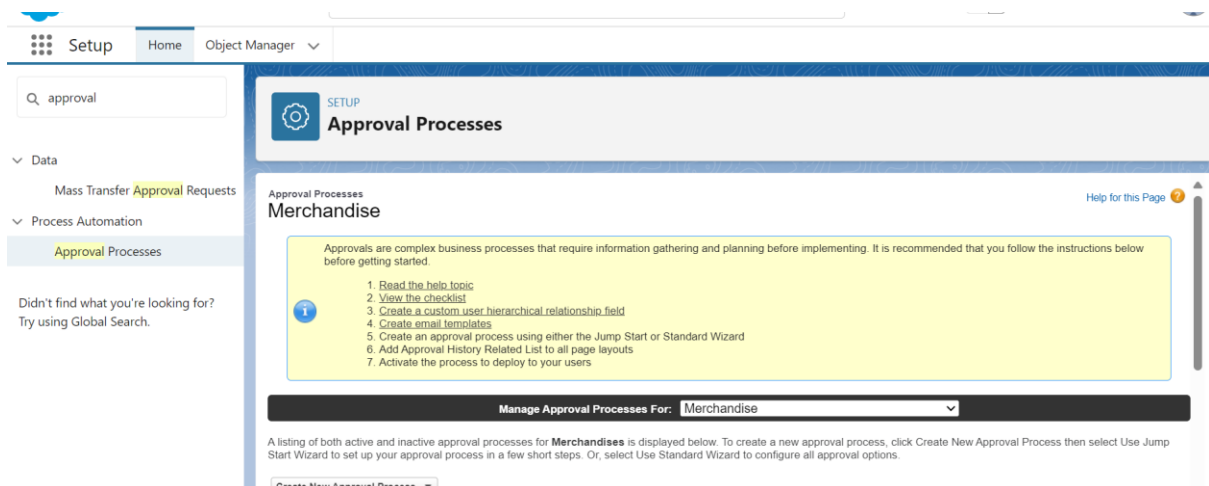
Easy

1)Write an approval process for Merchandise Object when you are buying stock more than 10000.

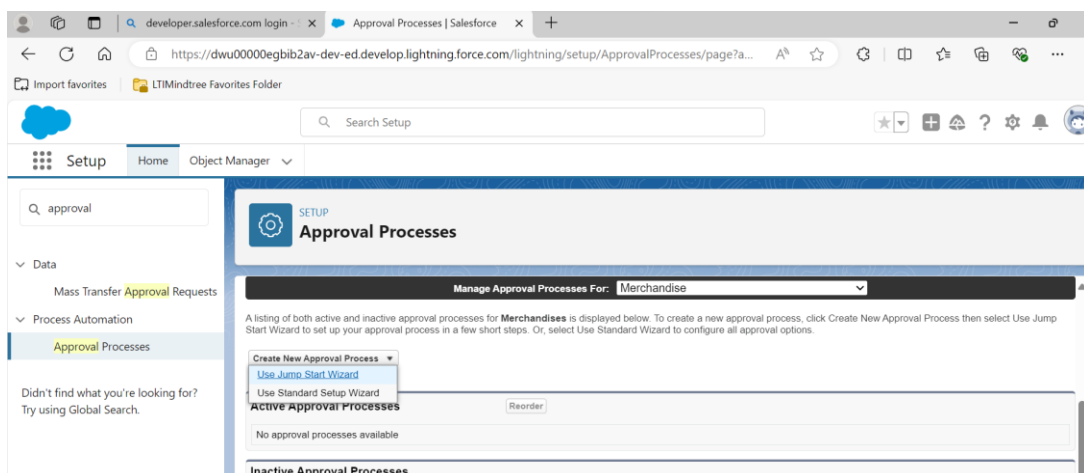
Note: It should be go to your manager for getting approved.

Steps:

- 1) Go to setup, in Quick Find and search for Approval Process and select it.
- 2) The below shown figure will open then select the object as Merchandise.



3)As shown in the below figure choose Use Jump Start Wizard.



4)After selecting that you can see the below image.

5)Enter the name, unique name

Approval Process Jump Start Wizard
Merchandise

Save Cancel

Approval Process Information * Required Information

The Jump Start wizard creates a one-step approval process for you in just a few minutes.

Enter a name for your process in the box below and then select an email template to notify the approver (optional).

Name

Unique Name i

Approval Assignment Email Template

Add the Submit for Approval button and Approval History related list to all Merchandise page layouts ☒ i

Use Approver Field of Merchandise Owner ☐

6)Select Use this approval process if the following: criteria are met thn give the criteria as Merchandise Stock > 10000.

Specify Entry Criteria

Use this approval process if the following criteria are met :

| Field | Operator | Value | |
|--------------------------------|--------------|-------|-----|
| Merchandise: Merchandise Stock | greater than | 10000 | AND |
| --None-- | --None-- | | AND |
| --None-- | --None-- | | AND |
| --None-- | --None-- | | AND |
| --None-- | --None-- | | |

[Add Filter Logic...](#)

Select Approver

Using the options below, specify the user to whom the approval request should be assigned.

☐ Let the submitter choose the approver manually.

7) Select Approver as shown in the below figure and as Manager.

--None-- --None--


--None-- --None--

Add Filter Logic...

Select Approver

Using the options below, specify the user to whom the approval request should be assigned.

☐ Let the submitter choose the approver manually.
☒ Automatically assign an approver using a standard or custom hierarchy field: **Manager**
☐ Automatically assign to queue:
☐ Automatically assign to approver(s).

 Because this is the Jump Start Wizard, Salesforce automatically chooses some settings for you. [Show More](#)

Save Cancel

8)After that don't forget to Activate.

Approval Processes [Help for this Page](#)

Merchandise: Merchandise Approval Process for Stock

[« Back to Approval Process List](#)

Process Definition Detail

Edit Clone Deactivate

| | | | | |
|------------------------------------|---|--|--|-------------------------------------|
| Process Name | Merchandise Approval Process for Stock | | Active | <input checked="" type="checkbox"/> |
| Unique Name | Merchandise_Approval_Process_for_Stock | Next Automated Approver Determined By | Manager of Record Submitter | |
| Description | | | | |
| Entry Criteria | Merchandise: Merchandise Stock GREATER THAN 10000 | | | |
| Record Editability | Administrator ONLY | Allow Submitters to Recall Approval Requests | <input type="checkbox"/> | |
| Approval Assignment Email Template | | | | |
| Initial Submitters | Merchandise Owner | | | |
| Created By | Panuganti Tanusri, 30/12/2024, 4:23 pm | Modified By | Panuganti Tanusri, 30/12/2024, 4:24 pm | |

9) Below figure shows the name of the Manager

SETUP
Users

Federation ID

Locale Settings

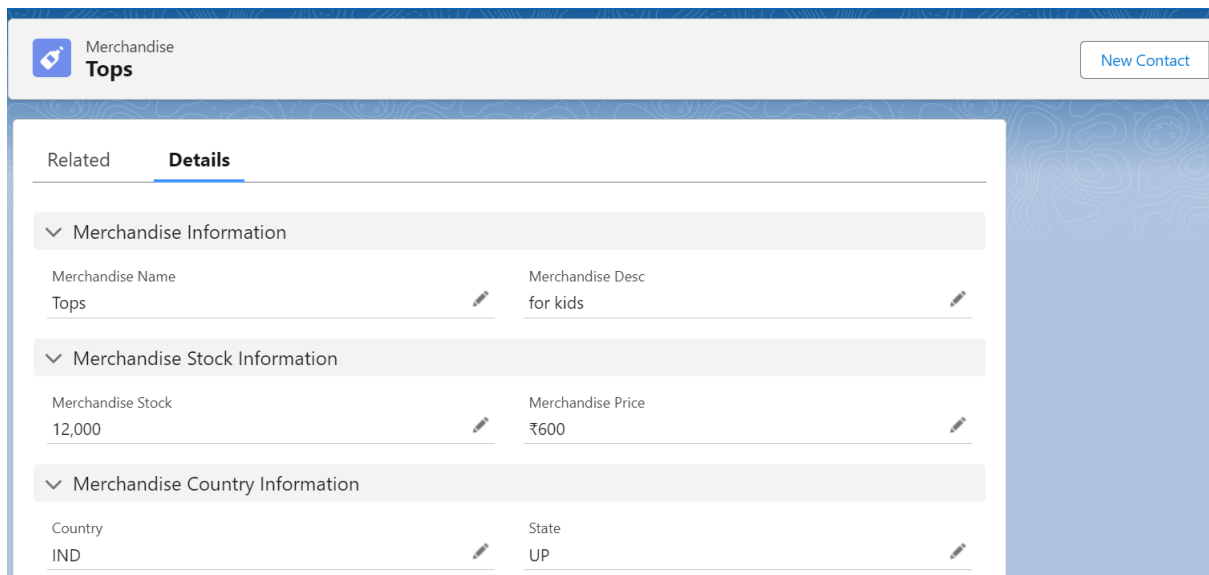
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
 Locale: English (India)
 Language: English

Approver Settings

Delegated Approver:
 Manager: Prabhas RebelStar
 Receive Approval Request Emails: Only if I am an approver

Save Save & New Cancel

10) Now enter the details in Merchandise

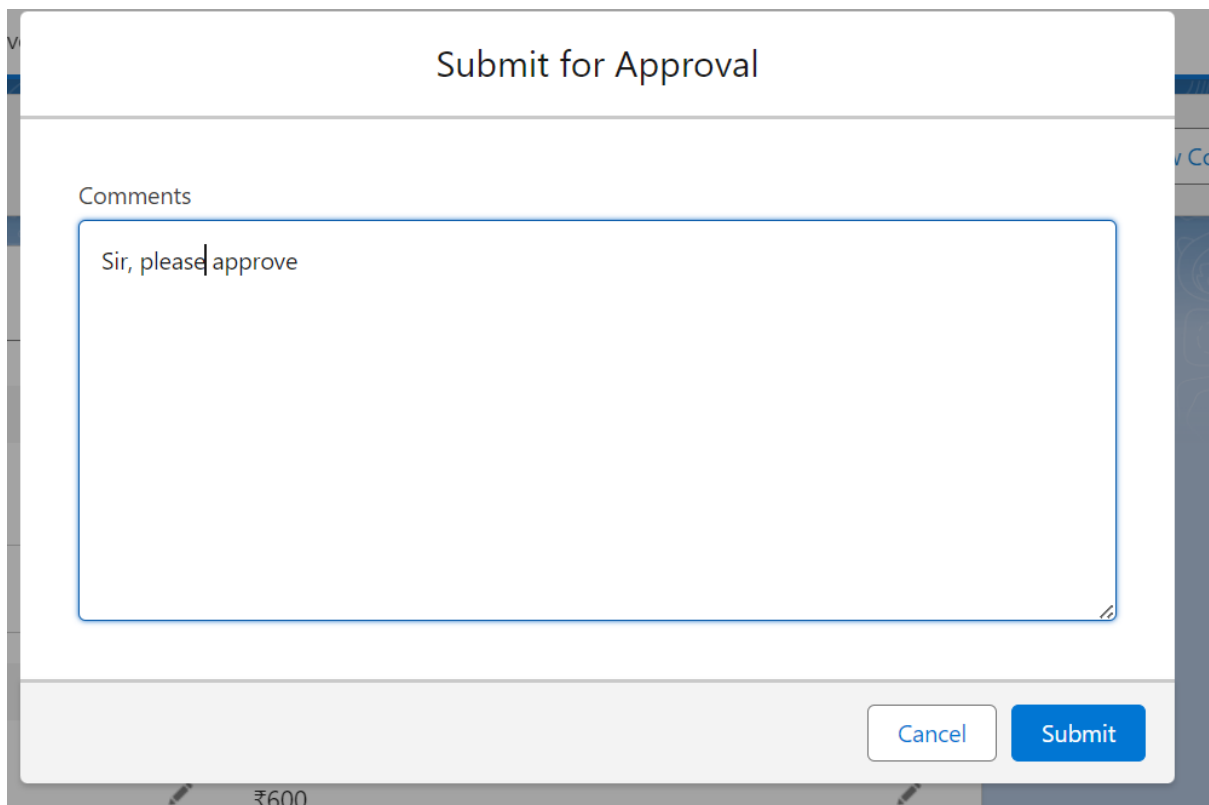


The screenshot shows a web application interface for managing merchandise. At the top, there's a header with a logo and the text "Merchandise Tops". A "New Contact" button is visible in the top right. Below the header, there are two tabs: "Related" and "Details", with "Details" being the active tab. The form is divided into three sections, each with a dropdown arrow on the left:

- Merchandise Information:** Contains two fields: "Merchandise Name" with the value "Tops" and "Merchandise Desc" with the value "for kids".
- Merchandise Stock Information:** Contains two fields: "Merchandise Stock" with the value "12,000" and "Merchandise Price" with the value "₹600".
- Merchandise Country Information:** Contains two fields: "Country" with the value "IND" and "State" with the value "UP".

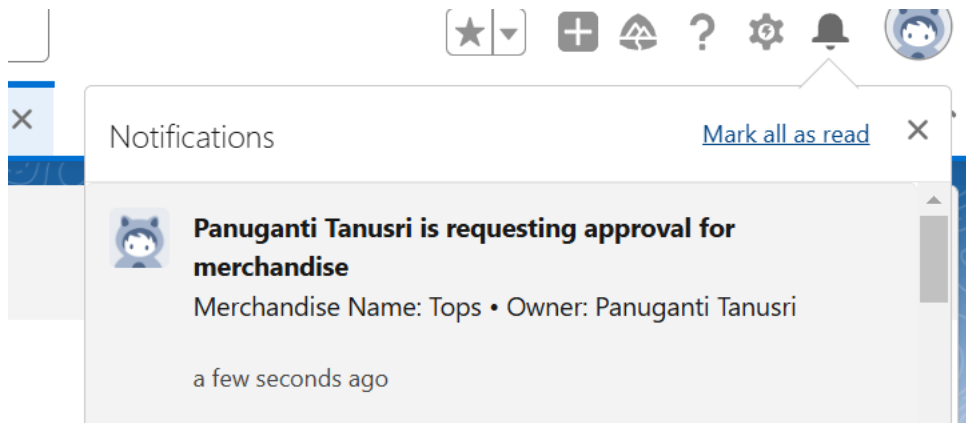
Each field has a small edit icon (pencil) to its right.

11) Now Submit for Approval.

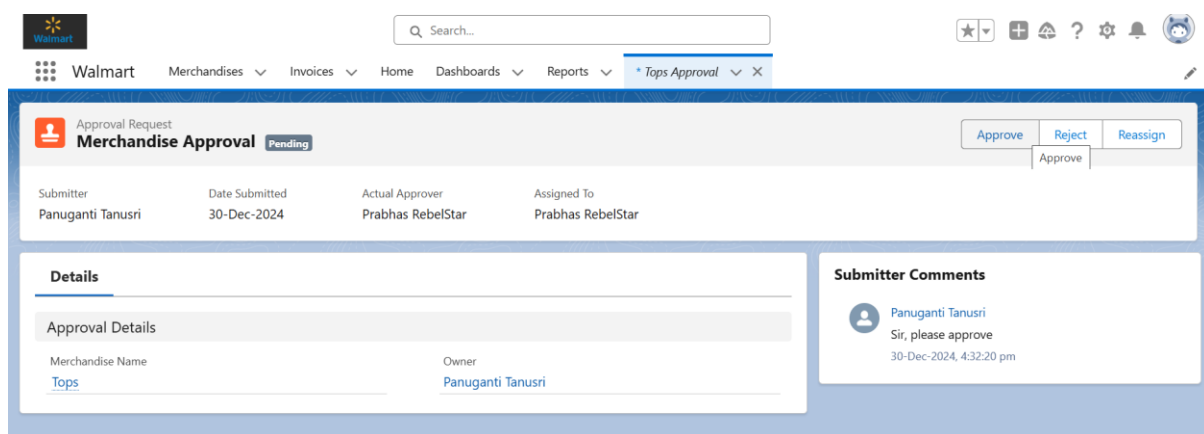


The screenshot shows a modal dialog box titled "Submit for Approval". Inside the dialog, there is a section labeled "Comments" with a large text area. The text "Sir, please approve" is entered in the text area. At the bottom right of the dialog, there are two buttons: "Cancel" and "Submit".

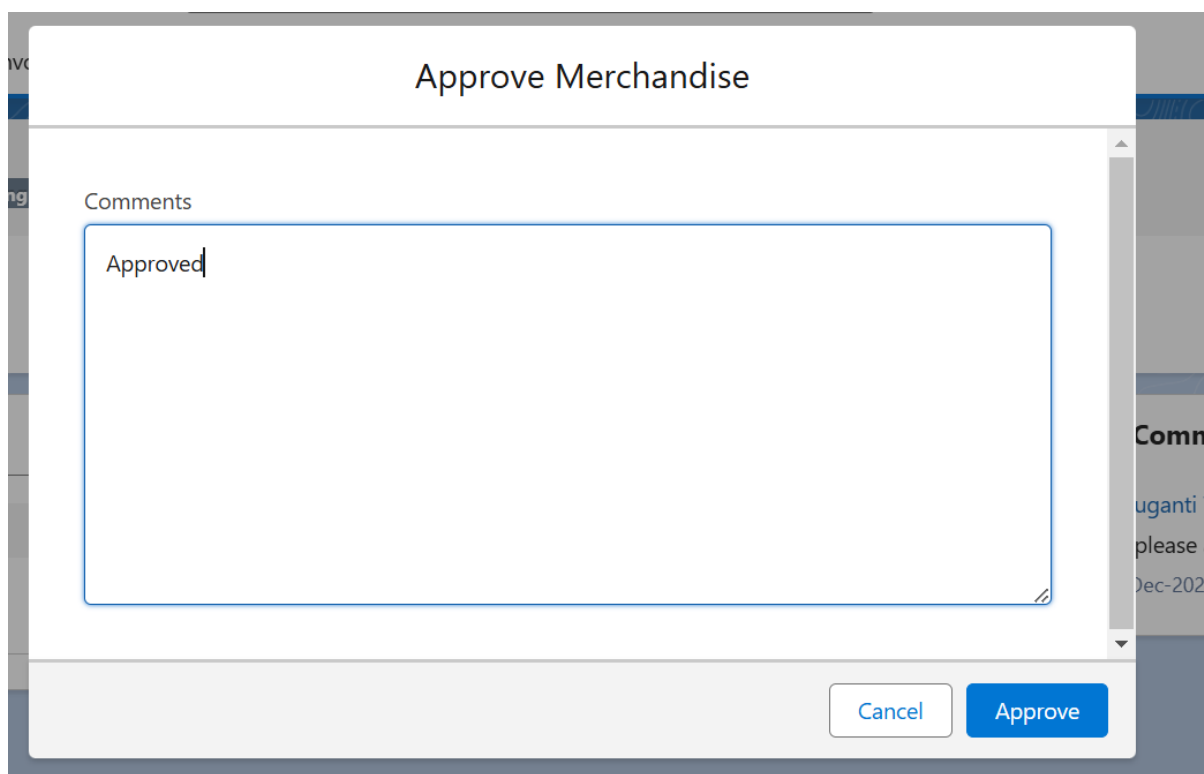
12) As shown in the below figure the manager will receive an notification for approval.



13) Now as you can see in the below figure there are options for Approval, Reject and Reassign.



14) Approved



15) Now you can see that its been Approved.

Walmart

Merchandises

Invoices

Home

Dashboards

Reports

Tops Approval

Process Instance Step

Merchandise Approval

Approved

Submitter

Panuganti Tanusri

Date Submitted

30-Dec-2024

Actual Approver

Prabhas RebelStar

Assigned To

Prabhas RebelStar

Details

Approval Details

Merchandise Name

Tops

Owner

Panuganti Tanusri

Approver Comments

Prabhas RebelStar

Approved

30-Dec-2024, 4:33:35 pm

Notifications

[Mark all as read](#)

Approval request for the merchandise is approved

Tops

a few seconds ago

Medium

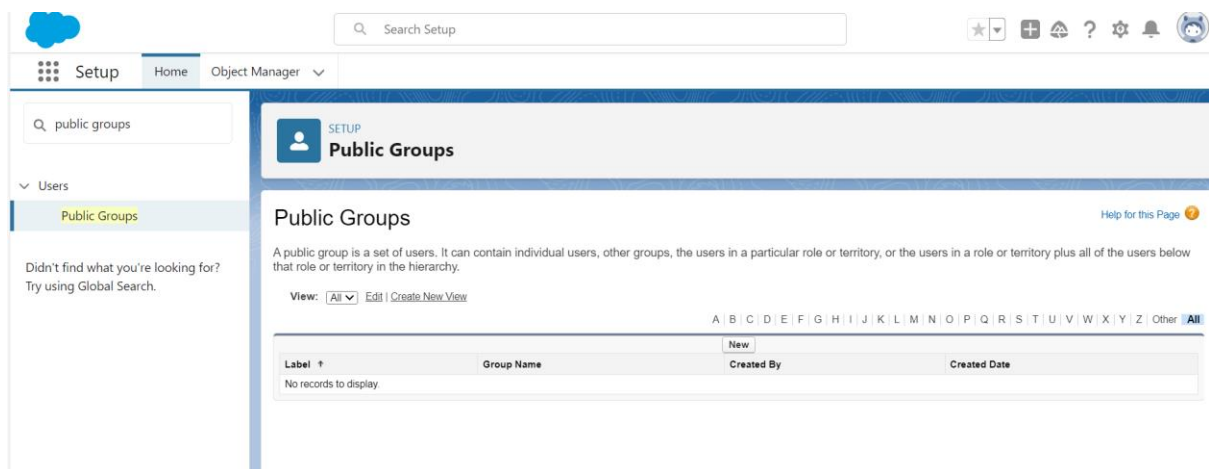
2) Please Share All the Merchandise Object Records with Newly Created User where Stock is greater than 2000.

Note: Only share with newly created User not with "All Internal Users"

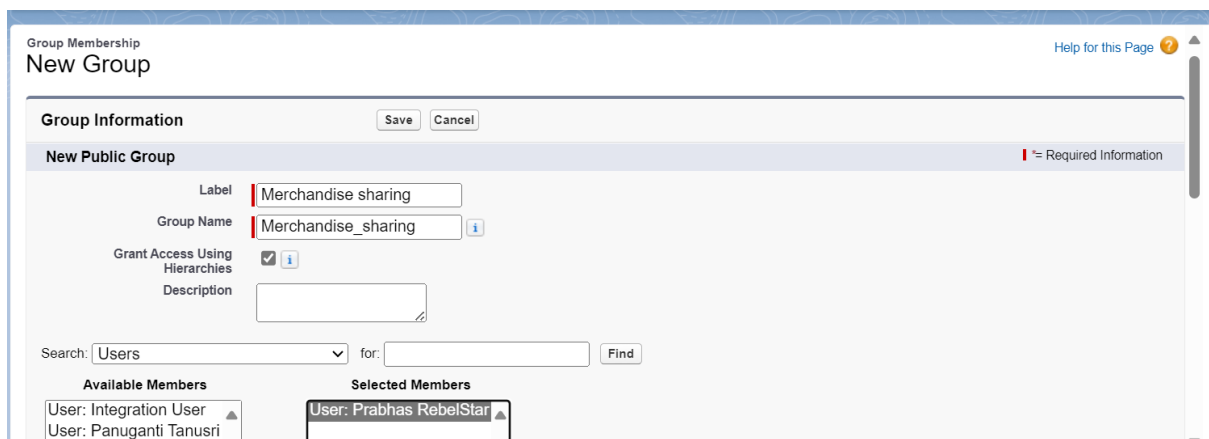
Ans:

Steps:

- 1) Set up go to Quick Find and then Public Groups and then click on new.



- 2) Now give the below Information as shown in the figure.



- 3) Now go to Set Up and then Sharing settings the below figure will open then choose the object as Merchandise.

Sharing Settings

Sharing Settings

[Help for this Page](#)

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: Merchandise

Disable External Sharing Model

Default Sharing Settings

3) Now click on New

Sharing Rules

Merchandise Sharing Rules

New

Recalculate

[Merchandise Sharing Rules Help](#)

No sharing rules specified.

4) Enter the below Information as shown in figure, give criteria as Merchandise Stock > 2000

Step 1: Rule Name

Label

Merchandise Records Shar

Rule Name

Merchandise_Records_Sha

Description

Step 2: Select your rule type

Rule Type

☐ Based on record owner
 ☒ Based on criteria

Step 3: Select which records to be shared

| Criteria | Field | Operator | Value | |
|----------|-------------------|--------------|-------|-----|
| | Merchandise Stock | greater than | 2000 | AND |
| | --None-- | --None-- | | AND |
| | --None-- | --None-- | | AND |
| | --None-- | --None-- | | AND |

5) Now select the user as the public group as Merchandise Sharing(that you created) and select the level of users as Read/Write.

Filter by

Filter by

Filter by

[Add Filter Logic...](#)

Additional Options

☒ Include records owned by users who can't have an assigned role [i](#)

Step 4: Select the users to share with

Share with

Public Groups

▼

Merchandise sharing

▼

Step 5: Select the level of access for the users

Access Level

Read/Write

▼

Save

Cancel

6) Below figure shows the records of mine as 20 items.

The screenshot shows the 'Merchandise' section of a Walmart management system. The interface includes a top navigation bar with 'Walmart' and tabs for 'Merchandise', 'Invoices', 'Home', 'Reports', and 'Dashboards'. Below the navigation bar, there's a header for 'Merchandise' with a filter set to 'All'. A status bar indicates '20 items • Sorted by Merchandise Name • Filtered by All merchandises • Updated a few seconds ago'. On the right, there are buttons for 'New', 'Import', 'Change Owner', 'Printable View', and 'Assign Label'. A search bar is also present. The main table lists 20 items, each with a checkbox, a number, and a name. The items are: 1. book, 2. Bottle, 3. Bottle, 4. E- Mobile, 5. hoodies, 6. Iphone, 7. jeans, 8. jeans, 9. Mobile, 10. pen, and so on. Each item has a dropdown arrow on the right.

| <input type="checkbox"/> | Merchandise Name ↑ | |
|--------------------------|------------------------------------|--|
| 1 | <input type="checkbox"/> book | |
| 2 | <input type="checkbox"/> Bottle | |
| 3 | <input type="checkbox"/> Bottle | |
| 4 | <input type="checkbox"/> E- Mobile | |
| 5 | <input type="checkbox"/> hoodies | |
| 6 | <input type="checkbox"/> Iphone | |
| 7 | <input type="checkbox"/> jeans | |
| 8 | <input type="checkbox"/> jeans | |
| 9 | <input type="checkbox"/> Mobile | |
| 10 | <input type="checkbox"/> pen | |
| 11 | <input type="checkbox"/> pen | |
| 12 | <input type="checkbox"/> pen | |
| 13 | <input type="checkbox"/> pen | |
| 14 | <input type="checkbox"/> pen | |
| 15 | <input type="checkbox"/> pen | |
| 16 | <input type="checkbox"/> pen | |
| 17 | <input type="checkbox"/> pen | |
| 18 | <input type="checkbox"/> pen | |
| 19 | <input type="checkbox"/> pen | |
| 20 | <input type="checkbox"/> pen | |

7) Now you can see the 13 items in the other user account as only 13 items have stock > 2000.

Final Result:

The screenshot shows the 'Merchandise' section of a Walmart management system, similar to the previous one but with a different set of items. The status bar indicates '13 items • Sorted by Merchandise Name • Filtered by All merchandises • Updated a few seconds ago'. The main table lists 13 items, each with a checkbox, a number, and a name. The items are: 1. book, 2. Bottle, 3. E- Mobile, 4. hoodies, 5. Iphone, 6. jeans, 7. Mobile, 8. Redmi, 9. Samsung, and 10. sweaters. Each item has a dropdown arrow on the right.

| <input type="checkbox"/> | Merchandise Name ↑ | |
|--------------------------|------------------------------------|--|
| 1 | <input type="checkbox"/> book | |
| 2 | <input type="checkbox"/> Bottle | |
| 3 | <input type="checkbox"/> E- Mobile | |
| 4 | <input type="checkbox"/> hoodies | |
| 5 | <input type="checkbox"/> Iphone | |
| 6 | <input type="checkbox"/> jeans | |
| 7 | <input type="checkbox"/> Mobile | |
| 8 | <input type="checkbox"/> Redmi | |
| 9 | <input type="checkbox"/> Samsung | |
| 10 | <input type="checkbox"/> sweaters | |