

## Problem Statement:

The management requires you to add more functionalities to the wallet object we created in the last assignment (refer assignment 9 for objects)

Now the management wants you to add more logic to the module:

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

Ans-

The screenshot shows the 'Wallet Custom Field' configuration page for 'Wallet Balance'. The left sidebar lists navigation 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, and List View Button Layout. The main content area is titled 'Wallet Custom Field' and 'Wallet Balance'. 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 details for the 'Wallet Balance' field, including its label, name, API name, description, help text, data owner, field usage, data sensitivity level, and compliance categorization. The 'Formula Options' section shows the data type as 'Formula', decimal places as '2', and the formula as 'Balance\_\_c - Bill\_\_c / Bill\_Amount\_\_c'. The 'Balance\_\_c - Bill\_\_c / Bill\_Amount\_\_c' formula is displayed at the bottom.

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

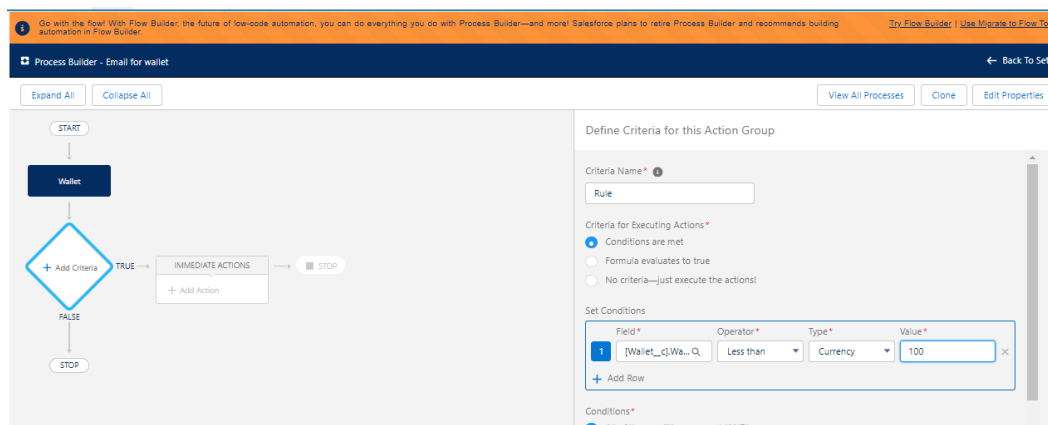
Ans-

### Wallet Validation Rule

The screenshot shows the 'Validation Rule Detail' page for the 'Wallet\_rule'. The left sidebar lists navigation 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, and List View Button Layout. The main content area is titled 'Validation Rule Detail' and includes tabs for 'Edit' and 'Clone'. The 'Rule Name' is 'Wallet\_rule', and the 'Error Condition Formula' is 'Wallet\_Balance\_\_c < 0'. The 'Error Message' is 'Wallet balance should never be negative.', and the 'Error Location' is 'Top of Page'. The 'Description' is empty. The 'Created By' is 'Veena G.' on 10/9/2023 at 8:22 PM, and the 'Modified By' is 'Veena G.' on 10/9/2023 at 8:22 PM. The 'Active' checkbox is checked.

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

Ans Step 1 > process builder



## Module 10 Assignment – Business Logic

Input Action – and result is-

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes links for Business Brands, Contribute, Service Resources, Data Use Legal Basis, List Emails, Shifts, Service Territories, Communication Subscriptions, Opportunities, and App Launcher. The left sidebar contains a search bar and a navigation menu with links for Lightning Experience Transition Assistant, Salesforce Mobile Quick Start, Home, and Administer. The main content area displays the configuration for an Email Alert titled "Your Wallet balance is less than 100 please fund this account". The alert is configured with the following details:

- Description:** Your Wallet balance is less than 100 please fund this account
- Unique Name:** Your\_Wallet\_balance\_is\_less\_than\_100\_please\_fund\_this\_account
- From Email Address:** Current User's email address
- Recipients:** User: Veena G
- Additional Emails:**
- Created By:** Veena G, 10/9/2023, 10:08 PM
- Modified By:** Veena G, 10/9/2023, 10:08 PM
- Email Template:** Sales: New Customer Email
- Object:** Wallet

Below the details, there is a section titled "Rules Using This Email Alert" which states: "This alert is currently not used by any rules".

The screenshot shows the Salesforce Process Builder interface. The top navigation bar includes links for Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with Process Builder—and more! Salesforce plans to retire Process Builder and recommends building automation in Flow Builder. The left sidebar contains a search bar and a navigation menu with links for My Processes, Home, and Administer. The main content area displays a process titled "Email for wallet". The process flow is as follows:

- START** (Start node)
- Wallet** (Object node)
- Rule** (Decision node) with the condition: "Email alert for wallet ..."
- IMMEDIATE ACTIONS** (Action node) with the action: "Email alert for wallet ..."
- STOP** (End node)

Below the flow diagram, there is a table titled "My Processes" showing the details of the process:

PROCESS	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS
Version 1: Email for wallet		Wallet	Record Change	10/9/2023	Active	

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

Ans-

The screenshot shows the Salesforce Fields & Relationships page. The top navigation bar includes links for Q, Quick Find, New, Deleted Fields, Field Dependencies, and Set History Tracking. The left sidebar contains a search bar and a navigation menu with links for Fields & Relationships, Home, and Administer. The main content area displays a table titled "Fields & Relationships" showing the details of the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Sum Of Bills	Sum_Of_Bills__c	Roll-Up Summary (SUM Bill)		
User Name	Name	Text(80)		✓

Module 10 Assignment – Business Logic

User Custom Field  
Sum Of Bills  
[Back to User](#)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Sum Of Bills	Object Name	User
Field Name	Sum_Of_Bills		
API Name	Sum_Of_Bills__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Veena G, 10/9/2023, 10:20 PM	Modified By	Veena G, 10/9/2023, 10:20 PM

Roll-Up Summary Options

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