

1. Create a validation rule for the Accounts object where the type is 'Customer-direct' and industry is '' with an error message 'Please provide industry type'

Ans- In Account object> Validation rule > Add syntax –

AND

(ISPICKVAL

(type, "Customer -Direct") , ISPICKVAL(Industry, ""))

)

Object Manager

Account Validation Rule

[Back to Account Validation Rules](#)

Validation Rule Detail		Edit	Clone	Active	<input checked="" type="checkbox"/>
Rule Name	Customer_type_rule				
Error Condition Formula	AND (ISPICKVAL (Type, "Customer -Direct") , ISPICKVAL(Industry, ""))				
Error Message	Please provide industry type for direct customer			Error Location	Top of Page
Description					
Created By	Veena G. 10/10/2023, 12:22 PM			Modified By	Veena G. 10/10/2023, 12:22 PM

[Edit](#) [Clone](#)

2. Create workflow rules for the Opportunity object where the opportunity amount is greater than US\$1000. Add workflow actions for updating the Opportunity field with the formula 'VIP Customer'+ Name if the amount of the opportunity is greater than US\$1000

Ans-

Edit Rule Opportunity 1

[Help for this Page](#)

Step 3: Specify Workflow Actions Step 3 of 3 [Done](#)

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	Evaluation Criteria
Opportunity: Amount GREATER THAN "INR 1,000"	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

[Add Workflow Action](#)

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](#)

New Field Update

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply you select.

Field Update Edit

[Next](#) [Cancel](#)

Identification

Name:

Unique Name:

Description:

Object: Opportunity

Field to Update:

[Next](#) [Cancel](#)

Edit Rule Opportunity 1

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria Opportunity: Amount GREATER THAN "INR 1,000"
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
Edit Remove	Field Update	Action for update

[Add Workflow Action](#)

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](#)

All Workflow Rules

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](#)

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

View: [All Workflow Rules](#) | [Create New View](#)

Quick Tips

- [Useful Sample Workflow Rules](#)
- [Video Tutorial \(English Only\)](#)
- [Troubleshooting Workflow](#)

Action	Rule Name	Description	Object	Active
Edit Del Deactivate	Opportunity 1		Opportunity	<input checked="" type="checkbox"/>

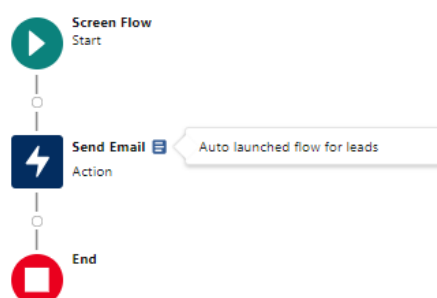
Activated

Result-

The screenshot shows a Salesforce Opportunity record for 'Edge Communications'. The record is in the 'Prospecting' stage. The workflow rule 'VIP CustomerAction for update' is active. The details section shows the Opportunity Owner as 'Veena G' and the Amount as 'INR 1,001.00'. The 'Related' section shows 'Products (0)'.

3. Create a flow for sending an email with Screen Flow as 'Auto launched Flow' and add the flow to the Leads object

Ans- Setup> flows> New Flow>



Module 8 Assignment – Workflow & Process Automation

The screenshot shows the Lightning App Builder interface for a Lead record. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Lead Record Page'. The left sidebar lists components under 'Standard (38)', including Accordion, Action Launcher, Actions & Recommendations, Activities, Automated Action Reminders, Chatter, Chatter Feed, and Chatter Publisher. The main content area displays the lead's details for 'Mr. Ram Sita' and a flow component titled 'Book Appointment from Invitation'. The right sidebar shows the flow configuration options, including 'Flow', 'Layout', and 'InvitationKey'.

4. Create a process builder for the Opportunity object with an amount field. When the opportunity amount is US\$5000, update the record as 'VIP Customer'

Ans- Process builder> User formula > [Opportunity].Name & "VIP"

The screenshot shows the Process Builder interface for the Opportunity object. The process flow starts with 'START', followed by an 'Opportunity' object, then a decision diamond 'VIP customer'. If TRUE, it triggers 'IMMEDIATE ACTIONS' (VIP Updashes) and 'SCHEDULED ACTIONS' (Set Schedule), leading to a 'STOP' node. If FALSE, it bypasses the actions. The bottom section shows 'My Processes' with a table listing the 'Opportunity VIP' process.

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