

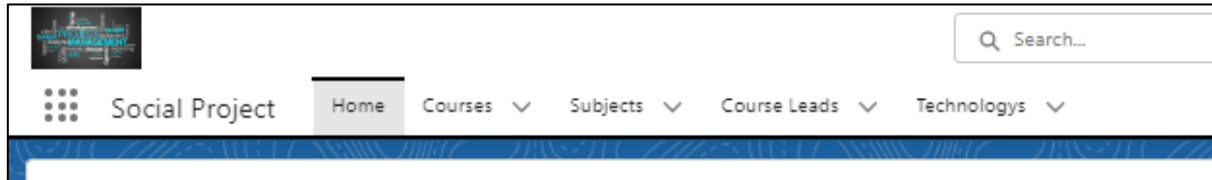
SALESFORCE ADMIN PROJECT – FLOW BUILDER

Domain: Social

Object Creation :

1. Create custom object named:

a. Course b. Subjects c. Course Leads d. Technology

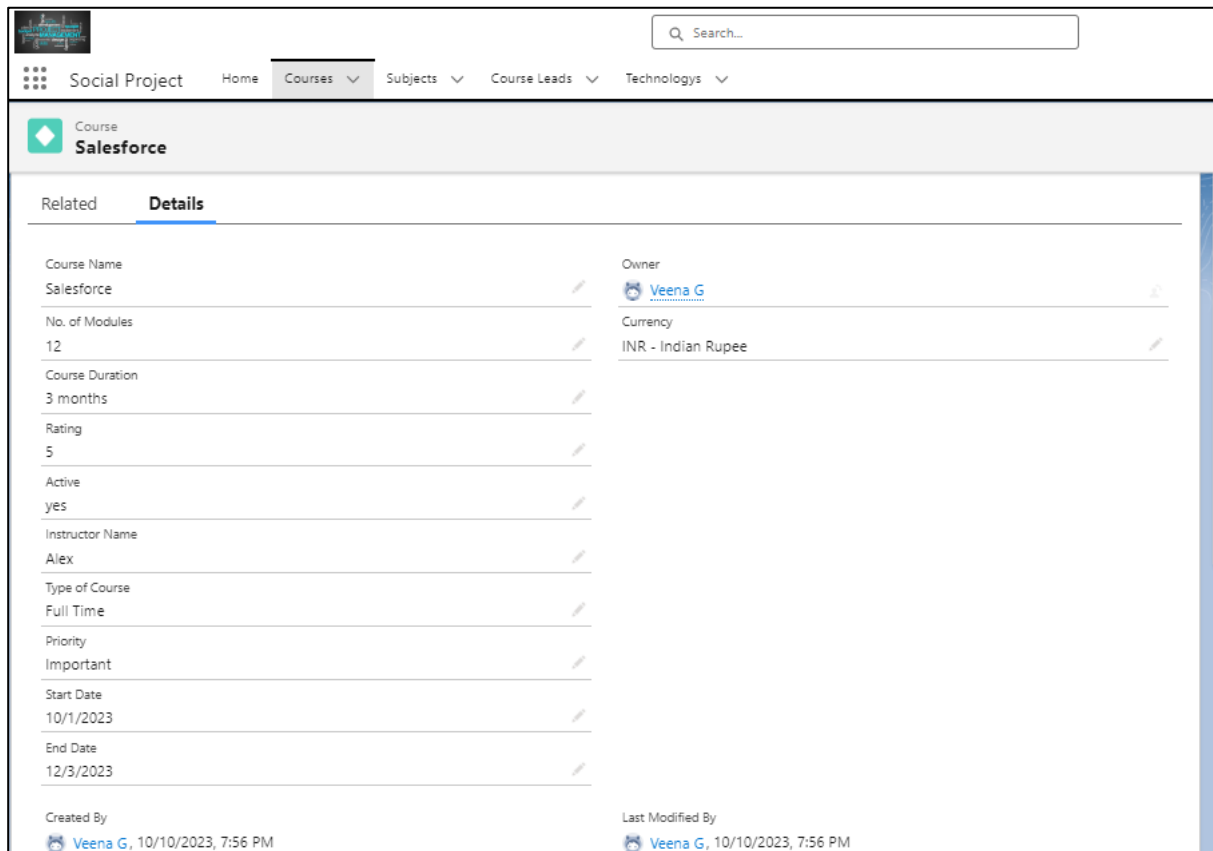


Field Creation

1. Course

a. Course Name b. No. of Modules c. Course Duration d. Rating e. Active

Ans-



Subject

- a. Subject Name b. No. of Modules c. Instructor Name d. Rating e. Priority f. Category g. xLevel

Ans-

Social ProjectHomeCoursesSubjectsCourse LeadsTechnologys

SubjectDeveloper

RelatedDetails

Subjects NameDeveloper

No. of Modules12

Instructor NameAlex

Rating5

PriorityImportant

CategoryOnline

Level5

Created ByVeena G, 10/10/2023, 8:02 PM

OwnerVeena G

CurrencyINR - Indian Rupee

Last Modified ByVeena G, 10/10/2023, 8:02 PM

Course Leads

a. First Name b. Last Name c. Phone d. Email e. Source f. Category g. Rating h. Currency i. Course Lead Amount

Ans –

Course Lead
VEENA

Related **Details**

First Name	VEENA	Owner	Veena G
Last Name	GIRI	Currency	INR - Indian Rupee
Phone	0986754		
Email	@GMAIL		
Source	ONLINE		
Category	LEARNING		
Rating	5		
Currency	INR 30,000.00		
Course Lead Amount	INR 30,000.00		
Created By	Veena G, 10/10/2023, 8:09 PM	Last Modified By	Veena G, 10/10/2023, 8:09 PM



Technology

a. Name b. Type c. Category d. Rating e. Active

Ans-

SETUP • OBJECT MANAGER
Technology

Details

Fields & Relationships
10 Items. Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Active	Active__c	Text(18)		
Availability	Availability__c	Text(18)		
Category	Category__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rating	Rating__c	Text Area(255)		
Technology Name	Name	Text(80)		✓
Type	Type__c	Text(10)		



Instructor Name

1. Mobile
2. Email
3. Qualification
4. Availability

Social Project Home Courses Subjects Course Leads Technologies Stati

Course Lead
Sayali

Related Details

* First Name
Sayali

Owner
Veena G

Last Name
B

Currency
INR - Indian Rupee

Phone

Required fields are missing: [Phone_c]

Email

Source

Category

Rating

Currency

We hit a snag.
Review the following fields
• [Phone](#)

Cancel Save

For technology-

Social Project Home Courses Subjects Course Leads Technologies

Technology
Salesforce

Related Details

* Technology Name
Salesforce

Owner
Veena G

Type

Required fields are missing: [Type_c]

Category
Learning

Rating
5

Active
yes

Availability
Regular

Created By
Veena G, 10/10/2023, 8:18 PM

We hit a snag.
Review the following fields
• [Type](#)

Cancel Save

4. Set Workflow rules for the all the custom objects created.

- If the priority of course is high, then update the course name to 'High Priority'+ Course Name.

SETUP

Workflow Rules

Workflow Rule

High priority

[Back to List: Email Alerts](#)

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](#)

Workflow Rule Detail

EditCloneDeactivate

Rule Name	High priority	Object	Subject
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	Subject: Priority SIGNALS Top priority		
Created By	Viana G, 10/10/2023, 9:31 PM		Modified By Viana G, 10/10/2023, 11:17 PM

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Field Update	Priority

Time-Dependent Workflow Actions

[See an example](#)

You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

Edit

If the course lead amount is greater than USD \$1000 then, give update the name field to 'Top Priority Customer'+ Name

SETUP

Workflow Rules

Workflow Rule

Top Priority Customer

[Back to List: Email Alerts](#)

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Workflow Rule Detail

EditCloneDeactivate

Rule Name	Top Priority Customer	Object	Course Lead
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	Course Lead: Course Lead Amount GREATER THAN "INR 1,000"		
Created By	Viana G, 10/10/2023, 10:15 PM		Modified By Viana G, 10/10/2023, 10:17 PM

Workflow Actions

Edit

Immediate Workflow Action

Workflow Rule: Top Priority Customer ~ Salesforce - Developer Edition

Type	Description
Field Update	Top Priority Customer

Time-Dependent Workflow Actions

[See an example](#)

You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

- 5) Create a flow using the below scenario for creating a Case. First, the user should enter the following fields in the case: • Name • Phone • Email • Course Enrolled • Subject • Instructor Name • Query Description

The screenshot shows a Salesforce 'Case record' form. At the top, there is a navigation bar with 'Social Project' and a search bar. Below this is a sub-navigation bar with 'Home', 'Courses', 'Subjects', 'Course Leads', and 'Technologys'. The main form area is titled 'Case record' and contains several input fields: 'Name' (with sub-fields for 'First Name' and 'Last Name'), 'Email' (with the placeholder 'you@example.com'), 'Course Enrolled', 'Subject', 'Instructor Name', and 'Query Description'. A 'Finish' button is located at the bottom right of the form. Below the form, there are tabs for 'Related' and 'Details'.

The screenshot shows a Salesforce 'Case' record page. At the top, there is a navigation bar with 'Sales' and a search bar. Below this is a sub-navigation bar with 'Home', 'Module 11 App page', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', and 'Reports'. The main area is titled 'Case' and contains a 'Most Recent Activity' section. This section has a search bar and a 'Comment' button. Below this, there are tabs for 'All Updates', 'Emails', 'Call Logs', 'Text Posts', and 'Status Changes'. The 'All Updates' tab is selected, showing a list of updates. The first update is from 'Veeva G' and says 'Case created'. It includes details: 'Subject: Priority: Medium', 'Status: New', and 'Case Number: 00001030'. There is a 'Comment' button at the bottom of the list.

After the case is created, assign the case to the course instructor. If the instructor is unavailable, assign it to a specific executive of the company. Further, when the query is resolved update the class as 'Resolved'

SETUP

Case Assignment Rule

Instructor details

Help for this Page

Add rule entries that specify the criteria used to route cases. You can reorder rule entries on this page after you create them.

Rule Detail

Rule Name

Instructor details

Active

☐

Created By

Veena G. 10/13/2023, 2:12 PM

Modified By

Veena G. 10/13/2023, 2:22 PM

Edit

Rule Entries

New | Reorder

Action	Order	Criteria	Assign To	Email
Edit Del	1	Case: Case Origin EQUALS Web	Veena G.	<input type="checkbox"/>

Queue

Case que

Edit

Delete

Label	Case que	Queue Name	Case_que
Queue Email		Send Email to Members	<input checked="" type="checkbox"/>
Supported Objects	Case		
Created By	Veena G. 10/13/2023, 2:24 PM	Modified By	Veena G. 10/13/2023, 2:24 PM

View All Users

Name	Type
Veena G.	User

Case Auto-Response Rule

Case rule

Add rule entries that specify the criteria and email template to use to respond to cases. You can reorder rule entries on this page after you create them.

Rule Detail

Rule Name

Case rule

Active

☐

Created By

Veena G. 10/13/2023, 2:24 PM

Modified By

Veena G. 10/13/2023, 2:26 PM

Edit

Rule Entries

New | Reorder

Action	Order	Criteria	Sent From (Email)	Template
Edit Del	1	Case: Status EQUALS Closed	Veena (veebhav2013@gmail.com)	Support: Case Assignment Notification

All Updates

Emails

Call Logs

Text Posts

Status Changes

Veena G

To: Veebha p

Just now

Dear Veebha,

Thank you for contacting us with your inquiry.

Your reference # for this case is: 00001031 The subject of your case is: ""

We look forward to speaking with you soon.

veebhav2013@gmail.com
Veena Enterprises

Reply

Reply All

Forward

Comment

Veena G via ypv20cm7yz7cghje.d45wrp.2t-om0ueaq.ap12.bnc.salesforce.com
to me ▾

2:31PM (0 minutes ago) ☆ ↩ ⋮

Dear Veebha,

Thank you for contacting us with your inquiry.

Your reference # for this case is: 00001031 The subject of your case is: ""

We look forward to speaking with you soon.

veebhav2013@gmail.com
Veena Enterprises

← Reply

→ Forward