

Technical documentation

Schema builder:



Objects used:

- Opportunity (Administrator/Inspector)
- Quote (Student)
- Quote Line Item (Scholarships and Payments)
- Price Book (Subject prices list)
- Product (Subject)

Administrator

Role:

Create an administrator 'profile' using any name and birthdate

Fields:

Opportunity Name: School admin/inspector name.

Close Date: birthdate.

Stage: which state of the scholar inscription is currency going on (any value will work)

New Opportunity

* = Required Information

Opportunity Information

Opportunity Owner

Alan V

Private

☐

* Opportunity Name

Prof. Joe

Account Name

Search Accounts...

Type

--None--

Lead Source

--None--

Amount

* Close Date

11/30/2024

Next Step

* Stage

Prospecting

Probability (%)

10%

Primary Campaign Source

Search Campaigns...

Additional Information

Order Number

Current Generator(s)

Tracking Number

Main Competitor(s)

Delivery/Installation Status

--None--

Cancel

Save & New

Save

Student

Role:

Administrators need to upload information of each student and fill the form with the required information.

Fields:

Quote Name: Student name.

Grade: Student average score.

Beca deportiva/ Beca Fam / Beca Economica : Select which scholarships the student applies for.

Periodo: Student desired period, cuatrimestral or semestral.

Expiration Date: Birthdate

Email: student email.

Phone: Student phone number.

New Quote

* = Required Information

Quote Information

Quote Number

Expiration Date

* Quote Name

Alan Vilchis

Opportunity Name

Prof. Joe

Account Name

Grade

9.9

Periodo

Semestral

BecaDeportiva

BecaFam

BecaEconomica

Totals

Discount

0.00%

Tax

Cancel Save Handling

Payments/ Scholarships

Role:

Last step before the pdf is generated, administrators need to provide information about campus, number of subjects and payment method.

Fields:

Product Name: Campus where the student is enrolled.

Quantity: Number of subjects the student will take.

Forma pago: Payment method, Contado (one single payment) or Mensual (monthly payment).

Add Products
Price Book: Clases 2024

Search Products...

Show Selected (1)

<input type="checkbox"/>	Product Name	Product Code	List Price	Product Description	Product Family
<input checked="" type="checkbox"/>	Guanajuato		\$17,000.00	Clase en Guanajuato	
<input type="checkbox"/>	Jalisco		\$13,000.00	Clase en Jalisco	
<input type="checkbox"/>	Nuevo León		\$18,000.00	Clase en Nuevo León	
<input type="checkbox"/>	Querétaro		\$15,000.00	Clase en Querétaro	

Edit Selected Quote Line Items

*Product	List Price	*Sales Price	*Quantity	*Forma Pago
1 Jalisco	\$13,000.00	\$13,000.00	3.00	Contado

After previewing the pdf the administrator can approve clicking any Quote Line Item name and checking the Approve checkbox after this, the pdf will be sent to the student provided email.

Q Search...

★ + ? ⚙️ ✕

PDF Preview

quoteTemplateDataViewer.apexp

1 / 1 | - 97% + | 📄 ↻

📄 🖨️ ⋮

1

TCS

Company Address US

Created Date 11/12/2024

Quote Number 00000018

Prepared By Alan V

Email alanr.vilchis@gmail.com

Email alanr.vilchis@gmail.com

Producto	Discount (Percentage)	Total Price
Descuento total	52.86%	\$0.00
Pago 10 Enero	52.86%	\$9,349.42
Pago 10 Febrero	52.86%	\$9,349.42
Pago 10 Marzo	52.86%	\$9,349.42
Pago 10 Abril	52.86%	\$9,349.42
Pago 10 Mayo	52.86%	\$9,349.42
Pago 10 Junio	52.86%	\$9,349.42
Beca de Excelencia	10.00%	\$0.00
Beca fam. Docente	30.00%	\$0.00
Subtotal	\$118,999.86	
Discount	52.86%	
Total Price	\$56,096.53	
Grand Total	\$56,096.53	

Quote Acceptance Information

Signature _____

Save and Email Quote

Save to Quote

Cancel

Save and Email Quote



Quote Line Item
Guanajuato

\$17,000.00

* Sales Price

\$0.00

* Quantity

7.00

* Forma Pago

Mensualidad

No Clone



Producto

Descuento total

discAcum

isBeca



Approved



System Information

Created By

Alan V, 11/12/2024, 3:35 PM

Last Modified By

Alan V, 11/12/2024, 3:35 PM

Cancel

Save

Save

Your Payments PDF

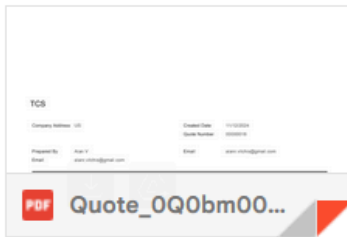
Recibidos x



Alan V a través de wk16llcztg8eivlh.xbcv.bm-cfsareaz.usa876.bnc.salesforce.com
para mí ▼

Please find attached the PDF for your payment details.

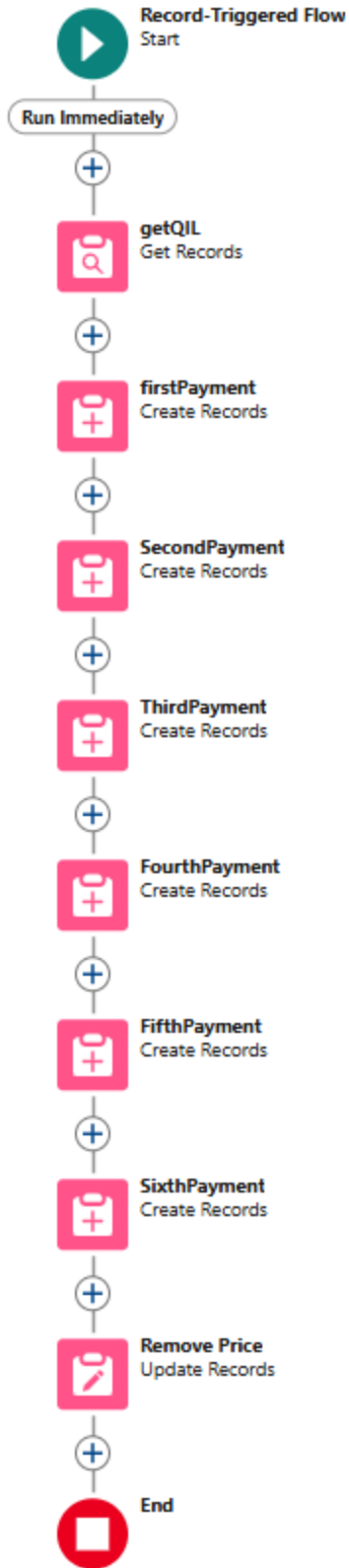
1 archivo adjunto • Analizado por Gmail ⓘ



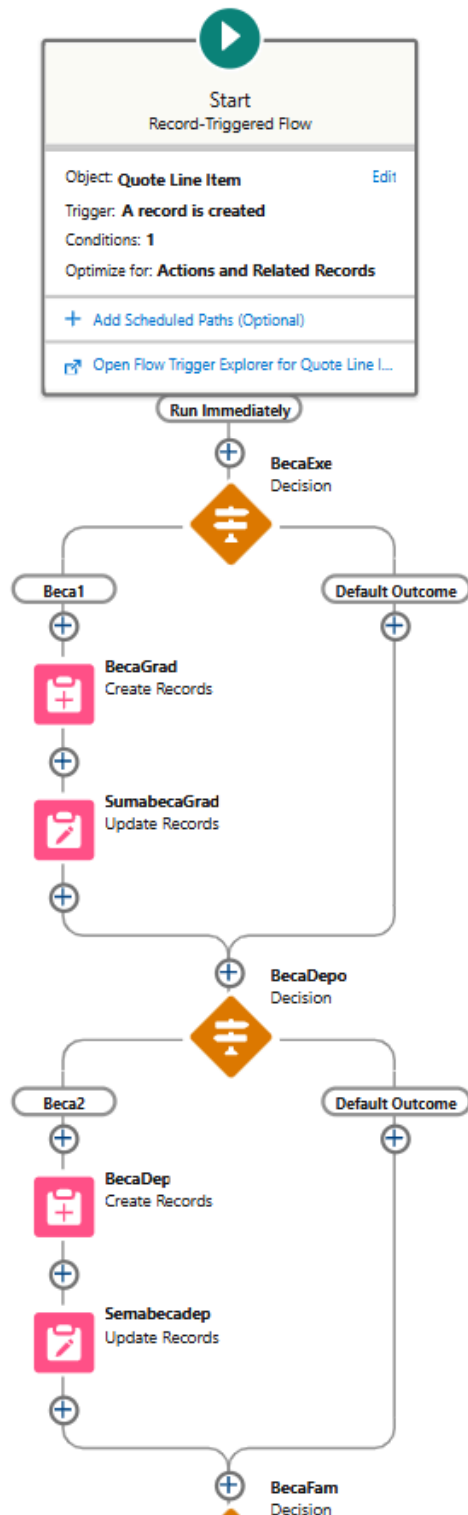
Backend

Flows

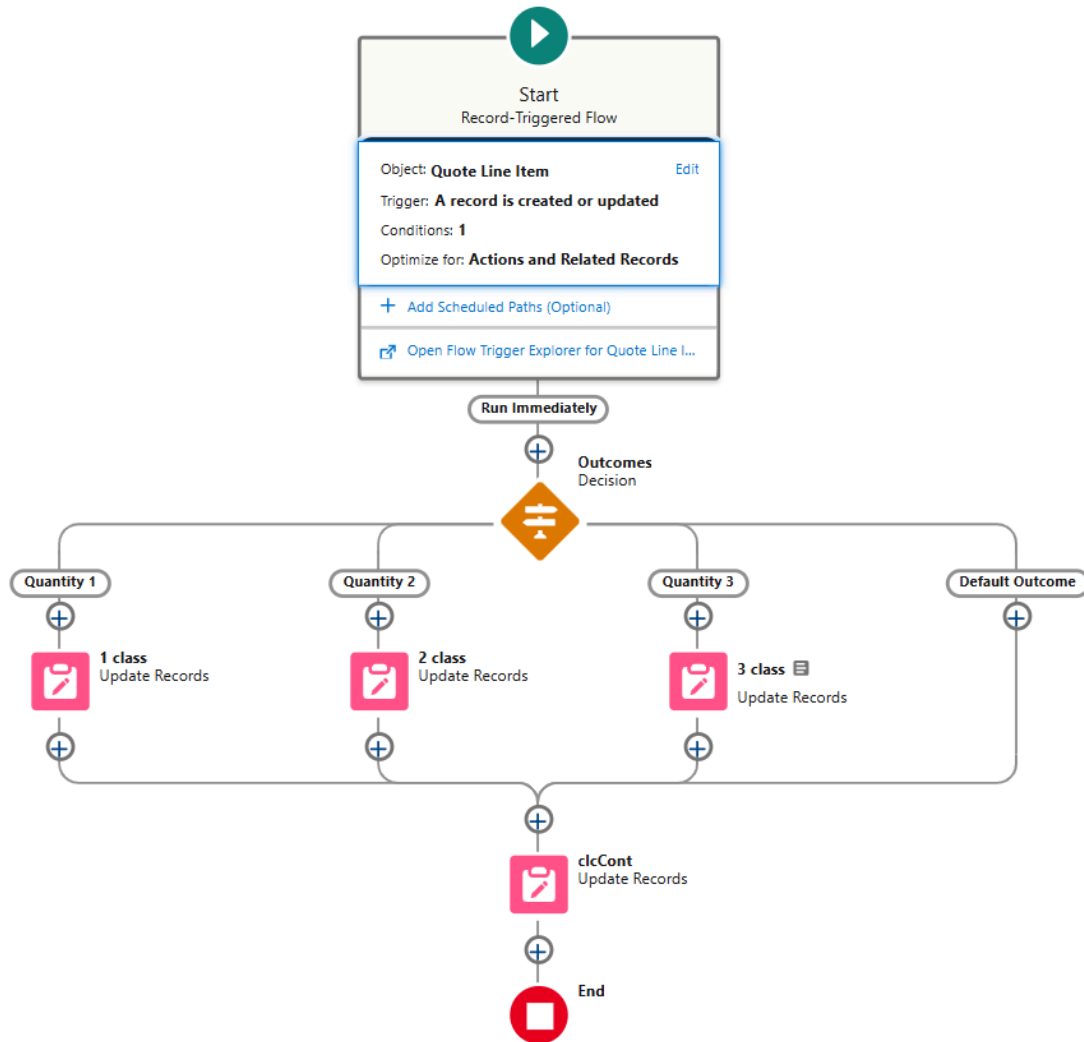
Three flows are the responsible of the system function, paymentTable will be triggered only if the payment method selected is monthly, six QLI (Quote line items) are created representing each payment.



The next flow (BecasCalc) will create a QLI for each scholarship the student has and will create an extra QLI if the payment method is one time payment.



Formula_quantity will calculate the discount depending on how many subjects the student has.



2. Actions and Related Records			Edit Order	New Flow
3 items • Sorted by Trigger Order • Record—Run After Save ⓘ				
1	paymentTable•V19	Active	▼	
2	BecasCalc•V15	Active	▼	
3	formula_quantity•V16	Active	▼	

Triggers & Apex classes

QuoteLineItemTrigger is responsible for calling the pdf generator class whenever a QLI is updated and the approved checkbox is true.

```
trigger QuoteLineItemTrigger on QuoteLineItem (after update) {
    Set<Id> quoteIds = new Set<Id>();

    // Collect all unique Quote IDs from the new Quote Line Items
    for (QuoteLineItem qli : Trigger.new) {
        if(qli.Approved__c){
            quoteIds.add(qli.QuoteId);
        }
    }

    // For each Quote ID, call the PDF generation method if conditions are met
    for (Id quoteId : quoteIds) {

        generateQuotePdfDocument.createSingleQuotePdf(quoteId);
        //EmailHelper.triggerEmail();
    }
}
```

GenerateQuotePdfDocument class creates and email and send it to the student email attaching the pdf that is generated using the default template of the quote(student) item

```

for (Id quoteId : quoteIds) {
    String currentQuoteUrl = quoteUrl + 'id=' + quoteId +
        '&headerHeight=197&footerHeight=10' +
        '&summlid=' + quoteTemplateId;

    PageReference pageRef = new PageReference(currentQuoteUrl);
    Blob quoteBlob;

    if (Test.isRunningTest()) {
        quoteBlob = Blob.valueOf('Generate Pdf');
    } else {
        quoteBlob = pageRef.getContentAsPDF();
    }

    QuoteDocument quoteDoc = new QuoteDocument();
    quoteDoc.Document = quoteBlob;
    quoteDoc.QuoteId = quoteId;
    lstQuoteDoc.add(quoteDoc);

    // Query the Quote to get the email address
    Quote quoteRecord = [SELECT Email FROM Quote WHERE Id = :quoteId LIMIT 1];

    // Create an email message and attach the PDF
    Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
    email.setToAddresses(new String[]{quoteRecord.Email});
    email.setSubject('Your Payments PDF');
    email.setPlainTextBody('Please find attached the PDF for your payment details.');
```

Validation Rules

There are two validation rules in the Student object and one in the QLI object.

Validation Rules

2 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
DiscVal	Top of Page	Only scholarships up to 60% are admitted.	✓	Alan V, 11/12/2024, 1:48 PM	▼
GradeVal	Grade	Only grades from 0 to 10 are admitted.	✓	Alan V, 11/12/2024, 1:46 PM	▼

Validation Rules

1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
PeriodoVal	Quantity	Up to 7 subjects in Semestral periods and up to 4 subjects in cuatrimestral periods.	✓	Alan V, 11/12/2024, 2:04 PM	▼