ECS05: Declarative Model II

1. Create a new custom object Client with the following fields
    a. Client Code – should be an auto incrementing number CL-{0000}
    b. Description – Free text area
    c. Point of Contact – Text field
    d. Mobile Number - Phone
    e. Email Address - Email
2. Create a new custom object Project Details with the following fields
    a. Project Code - should be an auto incrementing number PRJ-{0000}
    b. Project Description
    c. Implementation Type – (Product Development, Support, Enhancements, Enterprise Services)
    d. Start Date (Required)
    e. End Date (Required)
    f. Status – (Open, Closed, In Progress) Default value: Open
    g. Client – Reference to the client record
    h. Manager – Reference to an employee
3. Only employees with the Role as Project Managers should show up in the Manager pop up. (Hint: Use lookup filters)
4. Create "Role" custom object and implement a one to one relationship with Employee i.e. An employee should only have only one of the following roles – Project Manager, Developer, Sr. Developer, Solution Architect, Technical Lead.(Hint: use a workflow). The Role object should have the following fields
    a. Name - Text
    b. Description

5. Create a many to many relationship between an Employee and Project, as 1 Employee can be working on multiple projects and 1 Project will have multiple employees working on them.

6. Create tabs for Client and Project objects respectively and add them to the Payroll App created yesterday.

7. Restrict the creation of an employee where the DOB is 18 years older. Error message needs to be shown on the DOB field – "Please provide a valid Date of birth. Employee cannot be less than 18 years of Age."

8. Restrict the creation of a salary record for an Inactive Employee. Error message should be shown on top of the page – "Salary cannot be processed for inactive employees."

9. Customize the Client Page Layout to have the following

    a. Organize the Project page into the following sections – Client Details, Contact Details

    b. Layout the fields in 2 columns

    c. Add related lists to enable viewing all the Projects associated with a particular client. Following columns need to be shown – Project code

10. Customize the Project Page Layout to have the following

    a. Organize the Project page into the following sections – Department Details

    b. Layout the fields in 1 column

    c. Add related lists to enable viewing all the Name of all employees working on the project

11. Create a workflow to notify the Manager of the Employee once the record is deactivated. (Use: Text Email templates for email notification).

    P.S: Create a Manager Field on Employee which is self-lookup to Employee and Manager email field

12. Create a workflow to create a Calendar task for the Project and assign it to the System Administrator whenever a new project is created. Send a notification email as well.
13. Create a workflow to send an email notification to remind the Project Manager about the end date of the project 5 days prior to the same.
14. Create a workflow to set the Project status as Closed if the End Date is today.
15. Create a Role Hierarchy for Manager. If Opportunity Amount > 5000, the approval should be routed to the Manager.

16. **Clustering of Leads -** Clustering of Fresh Lead provides the segregation of lead records based on certain inputs which would places the records in one of the cluster i.e. NO NUMBER, DNC,

MOBILE and LANDLINE. The User can view the Lead records and can also find on which Cluster the Lead record exists. Four Record types would be created in Lead i.e. NO NUMBER, DNC, MOBILE and LANDLINE which would be updated from Work Flow based on which cluster Lead is falling.

17. **Big Deal Alert -** If your opportunity stage is in 'negotiation/review' stage, send an email to the opportunity owner indicating a big deal is being created. Big deal amount should be greater than 50k. Create email template also.
18. **Time based Follow up -** Send an Email to Lead owner if Time of follow-up has been elapsed. Create new field called follow-up of date on lead. If follow up date is older than today, send a email to the Lead Owner to follow up the lead. Create email template also.
19. You've been given a requirement to keep Contact addresses in sync with the Account they belong to. This functionality must update all child Contact addresses when the address of the Account record is updated. This functionality must update Contact mailing address fields (Street, City, State, Post Code, and Country) when the parent Account shipping address field values are updated.