



INTELOGIK-INTERNSHIP PROGRAM

INTELOGIK INTERNSHIP PROGRAM





INTELOGIK-INTERNSHIP PROGRAM

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Dhanashri Gade



PROJECT WORK: STORY 1

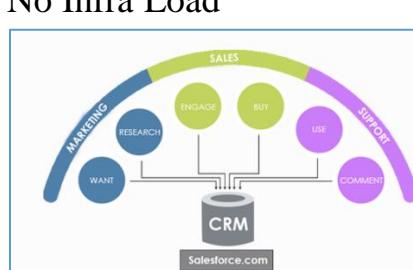
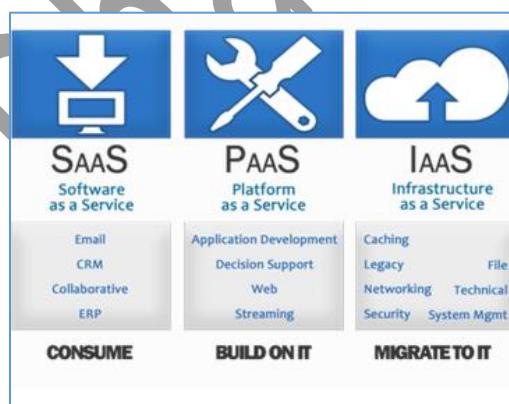
Executive Summary:

Thank you so much for giving us time for Meeting.

Intelogik has prepared solution as per your requirements.

Intelogik has provided proposed Solution for your Requirement.

SALESFORCE Platform is Solution to your requirement.

<u>SR NO</u>	<u>Client's Requirement</u>	<u>Proposed Solution From Intelogik Using Salesforce</u>
1	No Infra Load  	<ul style="list-style-type: none">• SALESFORCE Platform is 'Platform as a Service (PaaS) CRM' platform.• SALESFORCE is leading 'SaaS' and 'Paas'.• It will work on cloud. There is no need to install any package app, RAM or processor as we do in Traditional IT Process.• Salesforce now provides various software solutions and a platform for users and developers to develop and distribute custom software. There will be no infra load as it is Paas CRM.



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2

On cloud



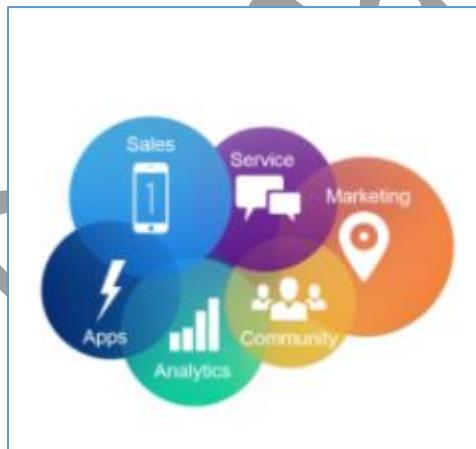
Using cloud computing, users are able to access software and applications from wherever they need, while it is being hosted by an outside party – in “the cloud.”



- SALESFORCE Platform is in the cloud, so companies Employees can use it from anywhere with access to only the internet.
- There are Sales Cloud, Service Cloud, Marketing Cloud.
- There is no need of any software or any hardware installation as SALESFORCE is leading cloud based platform which gives Flexibility to user to use this platform from any Location.

3

Flexible app, Easy to customise



- SALESFORCE Platform is Way More Flexible while Customizing.
- As per business needs, Salesforce Platform is easy to customize.
- If you want to add any new modules then you can do it quickly and easily.
- One of the most significant USP's of the Salesforce platform is its high degree of adaptability.
- The objects to be found in Salesforce can be set entirely in line with your own desires at any time.

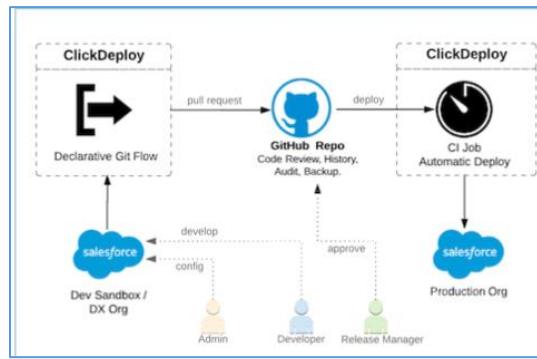


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		<ul style="list-style-type: none">As a user you are not tied in to certain set page layouts, workflows and processes, and this makes Salesforce's ecosystem more flexible than other similar systems on the market.																									
4.	<p>Easy payment methods</p> <table border="1"><thead><tr><th></th><th>Salesforce Sales Cloud</th><th>Salesforce Service Cloud</th><th>Salesforce Sales and Service Cloud</th><th>Salesforce Marketing Cloud</th></tr></thead><tbody><tr><th>Essentials</th><td>\$25 per user, per mo</td><td>\$25 per user, per mo</td><td>N/A</td><td>\$400 per mo</td></tr><tr><th>Professional</th><td>\$75 per user, per mo</td><td>\$75 per user, per mo</td><td>\$100 per user, per mo</td><td>\$1250 per mo</td></tr><tr><th>Enterprise</th><td>\$150 per user, per mo</td><td>\$150 per user, per mo</td><td>\$175 per user, per mo</td><td>\$3750 per mo</td></tr><tr><th>Unlimited</th><td>\$300 per user, per mo</td><td>\$300 per user, per mo</td><td>\$325 per user, per mo</td><td>By request</td></tr></tbody></table>		Salesforce Sales Cloud	Salesforce Service Cloud	Salesforce Sales and Service Cloud	Salesforce Marketing Cloud	Essentials	\$25 per user, per mo	\$25 per user, per mo	N/A	\$400 per mo	Professional	\$75 per user, per mo	\$75 per user, per mo	\$100 per user, per mo	\$1250 per mo	Enterprise	\$150 per user, per mo	\$150 per user, per mo	\$175 per user, per mo	\$3750 per mo	Unlimited	\$300 per user, per mo	\$300 per user, per mo	\$325 per user, per mo	By request	<ul style="list-style-type: none">SALESFORCE Platform allows you to pay for any service as per use. The payment methods are very easy and flexible.The average cost of SALESFORCE varies depending on your business needs.SALESFORCE Platform can cost from \$25 per user per month, to over \$300 — their monthly fee will vary depending on the needs and scale of each business.In SALESFORCE, Payment options include credit card, ACH (automated clearing house), or cash.The subscription to particular plan depends on Size of your team.Whenever you want to increase team size by adding User, you can buy Licenses as per need.
	Salesforce Sales Cloud	Salesforce Service Cloud	Salesforce Sales and Service Cloud	Salesforce Marketing Cloud																							
Essentials	\$25 per user, per mo	\$25 per user, per mo	N/A	\$400 per mo																							
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Enterprise	\$150 per user, per mo	\$150 per user, per mo	\$175 per user, per mo	\$3750 per mo																							
Unlimited	\$300 per user, per mo	\$300 per user, per mo	\$325 per user, per mo	By request																							



5. Quick Deployment



- SALESFORCE Platform [seamlessly integrates with 3rd party apps.](#)
- If you want to integrate Salesforce with Gmail you can do it, if you want to integrate it with your accounting software you can do that too.
- On the other hand, integration is tough with other CRMs. So it supports '[Quick Deployment](#)'

6. Easy to access from any location

- SALESFORCE Platform gives facility to work from anywhere – with a new employee service solution and new employee data model to enable organizations to build, manage and scale employee apps and services quickly and securely.
- SALESFORCE MOBILE APP gives you leverage to work from your mobile as well.



PROJECT WORK: STORY 2

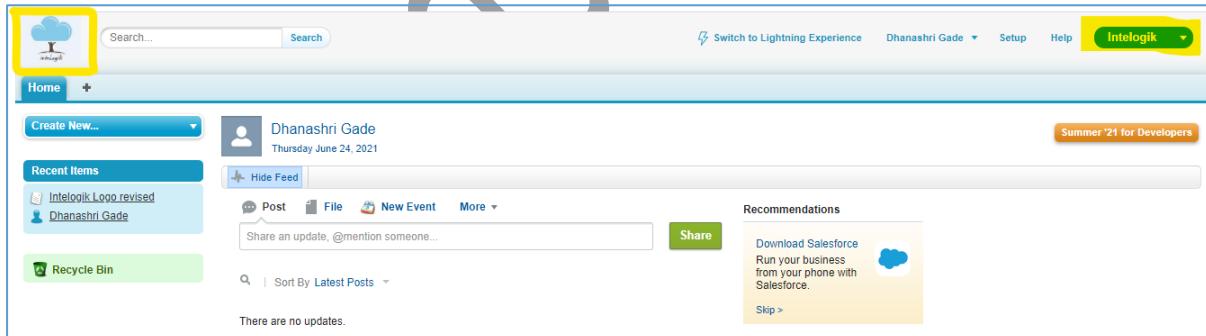
Questions to be asked during Client's meeting Regarding Requirement Elaboration before starting work:

SR No.	Questionnaire
1.	What kind of business Process the you want to execute on Salesforce Platform?
2.	How many users are going to use salesforce Platform?
3.	How many departments will be there and Department-wise details?
4.	How users will be assigned to Department? Can you just name users and their Department?
5.	What are Roles of each user?
6.	What will be Organization Hierarchy?
7.	How Data Access should be given to Users /Profiles?
8.	What kind of business data you want to store?
9.	Name the types of courses you want sell in this business?
10.	What are different services you will give to Students?
11.	What kind of Master Data you will provide?
12.	How objects will be dependent on each other? Can you tell us about Relationship between objects?



PROJECT WORK: STORY 3

- Client wants to execute all business process on SALESFORCE Platform.
- Create App.
 1. Create "Intelogik" app in salesforce org.
 2. Add Description: "This app is created for Client: Intelogik. "Intelogik wants to run business on Salesforce Platform and provide two services: Training and Placement."
 3. Insert Logo of Company:
 4. Go to Document by clicking on (+) sign in Classic →Create new Document → add "Logo" of Intelogik →check 'Externally Available Image' → Select 'My Personal Documents' folder →Save.
 5. Give proper access and Save App.



6. Switch to lightening and "Upgrade".
7. Edit app → Upload Image (Logo) in 'App Branding' → Save.



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(1).Table Details:

- Create Objects and Fields :

1. Object Name : Student Master

Sr No.	Field Name	Field Type	Field Values(If Present)
1.	Student Code	Standard Field → Name → AutoNumber	
2.	First Name	Text	
3.	Last Name	Text	
4.	Phone	Phone	
5.	Email	Email	
6.	City	Picklist	Pune, Mumbai, WDC, New York, New Jersey, London, Canberra, Sydney, Perth
7.	Country	Picklist	India, USA, UK, Australia, Canada
8.	State	Text/Picklist	
9.	Street	Text Area	
10.	Company	Text	
11.	Background	Picklist	Engineering, Management, Banking



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12.	Placement Scope Rating	Text	
13.	PAN Card Number	Text(Encrypted)	
14.	Current Salary	Currency	
15.	Java Ref Id	Text (External Id Field)	
16.	Background Check Status	Text	

New Student Master

Information

Student Code	Owner Shekhar G
First Name	
Last Name	
Phone	
Email	
City	--None--
Country	--None--
Street	
State	
Company	
Rating Score	--None--
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	

2. Object Name : Course Master

Sr No.	Field Name	Field Type	Field Values(If Present)
1.	Course Code	Standard Field → Name → AutoNumber	
2.	Course Name	Picklist	Dot Net , Java, Salesforce, PHP, SQL, Oracle, JavaScript, AWS, Hadoop, Tableau, Angular JS,D2B



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3.	Duration in Hours	Number	
4.	Course Fees	Currency	
5.	Category	Picklist	Cloud Tech, Mobile Tech, Web Tech

New Course Master

Information

Course Code	Owner
	Shekhar G
Course Name	
--None--	
Duration in Hours	
Course Fees	
Category	
--None--	

[Cancel](#) [Save & New](#) [Save](#)

3. Object Name : Trainer Master

Sr No.	Field Name	Field Type	Field Values(If Present)
1.	Name	Standard Field → Name → AutoNumber	
2.	First Name	Text	
3.	Last Name	Text	
4.	Education	Picklist	BE, ME, BSc, MSc, MCA, MBA, BA, BCA
5.	Experience	Number	
6.	Technology of Training	Picklist	Dot net, Java, Salesforce , C, CPP
7.	Fees per Student	Currency	



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8.	Country	Picklist	India, USA, UK , Australia, Canada
9.	Trainer Category	Picklist	Platinum, Gold, Silver, Bronze
10.	Linked In Profile	URL	
11.	Background Check Done(Yes/No)	Checkbox	
12.	Verification Status	Picklist	Verified, Non Verified, Details Needed

New Trainer Master Trainer Code

Information

Name	Owner
First Name	Shekhar G
Last Name	
Education	--None--
Experience	
Technology of Training	--None--
Fees per Student	
Country	
Trainer Category	--None--
Linked In Profile	
Background Check Done(Yes/No)	<input type="checkbox"/>
Verification Status	--None--
Cancel Save & New Save	

4. Object Name : Training Deal

Sr No.	Field Name	Field Type	Field Values(If Present)
1.	Deal Code	Standard Field → Name → AutoNumber	
2.	Course	Master-Detail to (Course Master)	
3.	Trainer Appointed	Lookup to (Trainer Master)	



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4.	Student	Master-Detail to (Student Master)	
5.	Fees proposed at Initial Discussion	Currency	
6.	Discount Percentage	Percentage	
7.	Discount Reason	Text	
8.	Fees Finalised for student	Formula Field	(Fees proposed at Initial Discussion *(Discount Percentage/100))
9.	Fees Paid by student	Currency	
10.	Fees Pending by Student	Formula Field	(Fees Finalised for student – Fees Paid by Student)
11.	Training Start Date	Date	
12.	Training Completion Date	Date	
13.	Deal Risk Status	Text	
14.	Email of Trainer	Email	
15.	Email of Student	Email	
16.	Fees to be paid to Trainer	Currency	
17.	Profit for Company	Formula Field	(Fees Finalised for student)-(Fees to be paid to Trainer)





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New Training Deal

Information	
Deal Code	*Course <input type="text" value="Search Course Masters..."/> 🔍
Fees proposed at Initial Discussion	*Student <input type="text" value="Search Student Masters..."/> 🔍
Discount Percentage	Trainer appointed <input type="text" value="Search Trainer Masters Trainer Codes..."/> 🔍
Discount Reason	Email of Student <input type="text"/>
Fees Paid by student	Email of Trainer <input type="text"/>
Deal Risk Status	Training Start Date <input type="text"/> 📅
Fees to be paid to Trainer	Cancel Save & New Save

5. Object Name : Placement Details

Sr No.	Field Name	Field Type	Field Values(If Present)
1.	Placement Code	Standard Field → Name → AutoNumber	
2.	Student	Master-Detail to (Student Master)	
3.	Technology	Lookup to (Course Master)	
4.	Company Name	Text	
5.	Country of Placement	Picklist	
6.	Salary Achieved	Currency	
7.	Promotional Field	Checkbox	



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New Placement Detail

Information

Placement Code

* Student

🔍

Promotional Field

🔍

Technology

🔍

Salary Achieved

🔍

Company Name

🔍

Country of Placement

🔍

Cancel Save & New Save

Dhanashri Ga

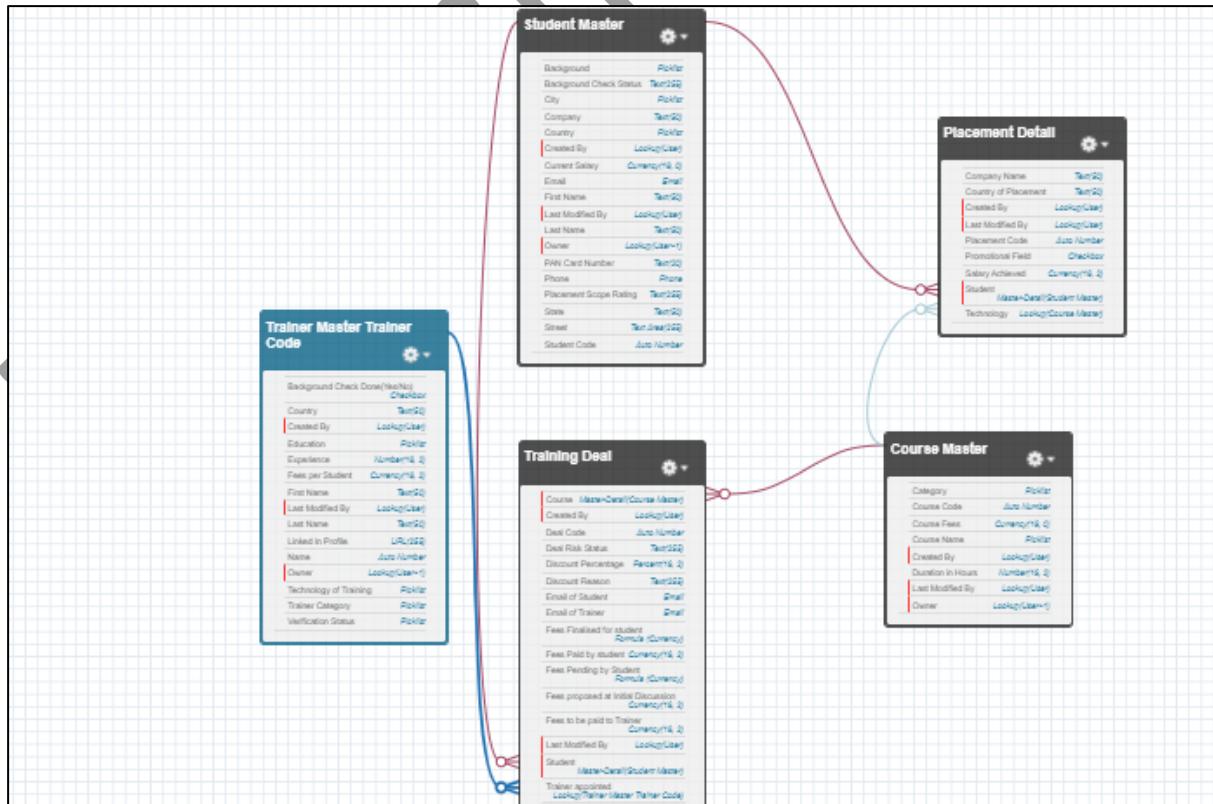


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(2).Relationship Between Objects:

Created Student Master, Course Master, Trainer Master Trainer Code, Training Deal, Placement Deal objects.
Relationship between these objects is defined as below.

Sr No.	Type of Relationship	Parent Object	Child Object	Field Name
1.	Master Detail	Student Master	Training Deal	Student
2.	Master Detail	Course Master	Training Deal	Course
3.	Master Detail	Student Master	Placement Details	Student
4.	Lookup	Trainer Master	Training Deal	Trainer appointed
5.	Lookup	Course Master	Placement Details	Technology





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(3).Roles:

Create new roles and Assign users to Roles.

Sr No.	Role	User Assigned
1.	Training Department	Harry
2.	Placement Department	Robert
3.	Sr. Management Academic	John
4.	Sr. Management Placement	Peter
5.	CEO	Shekhar

(4).Profile:

Create Profiles for different Departments and assign users.

Sr No.	Profile	User Assigned
1.	Training Department	Harry, John
2.	Placement L2 Department	Peter
3.	Placement L1 Department	Robert
4.	Management Department(System Administrator)	Shekhar

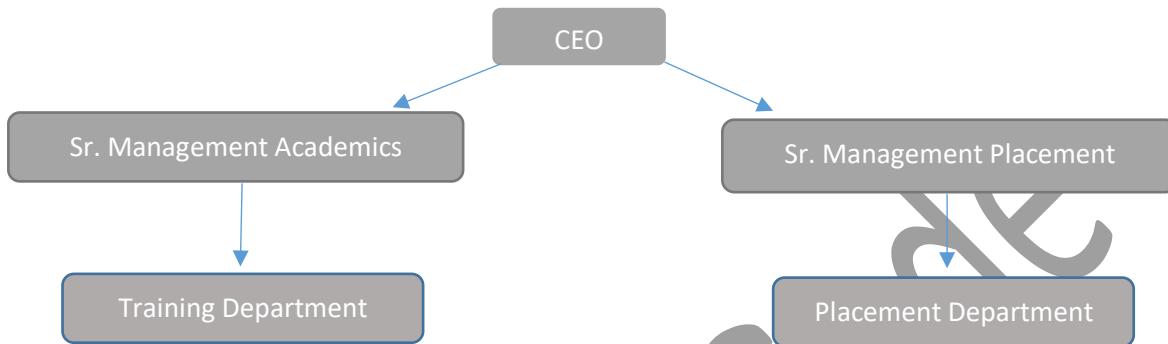
The screenshot shows the Salesforce Setup - Users page. The top navigation bar includes links for New User, Reset Password(s), and Add Multiple Users. The main table lists eight users with their details and assigned profiles. The profiles are color-coded and correspond to the roles listed in the previous table:

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5g000005kjw6eao.ggf5fe8bsuvl@chatter.salesforce.com			<input checked="" type="checkbox"/>	Chatter Free User	
<input type="checkbox"/>	Harry	Harry	harry25@gmail.com		Training Department	<input checked="" type="checkbox"/>	Training Department	
<input type="checkbox"/>	John	John	john25@gmail.com		Sr. Management Acedamics	<input checked="" type="checkbox"/>	Training Department	
<input type="checkbox"/>	Peter	ppte	peter25@intelogik.com		Sr. Management Placement	<input checked="" type="checkbox"/>	Placement L2 Department	
<input type="checkbox"/>	Robert	Rober	robert25@gmail.com		Placement Department	<input checked="" type="checkbox"/>	Placement L1 Department	
<input type="checkbox"/>	Shekhar	sg	dhanashri.gade@gmail.com	6/24/2021, 7:21 PM	CEO	<input checked="" type="checkbox"/>	System Administrator	
<input type="checkbox"/>	User Integration	integ	integration@00d5g000005kjw6eao.com			<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
<input type="checkbox"/>	User Security	sec	insightssecurity@00d5g000005kjw6eao.com			<input checked="" type="checkbox"/>	Analytics Cloud Security User	



(5)Role Hierarchy:

Create Hierarchy in Roles as per Business Process.



SETUP
Roles

Collapse All Expand All

- Intelogik
 - + Add Role
- **CEO** [Edit](#) | [Del](#) | [Assign](#)
 - + Add Role
- **Sr. Management Academics** [Edit](#) | [Del](#) | [Assign](#)
 - + Add Role
- **Training Department** [Edit](#) | [Del](#) | [Assign](#)
 - + Add Role
- **Sr. Management Placement** [Edit](#) | [Del](#) | [Assign](#)
 - + Add Role
- **Placement Department** [Edit](#) | [Del](#) | [Assign](#)
 - + Add Role

(6). Object Access for Profile:

Give Access to all users through profiles.

Objects	Student Master	Course Master	Trainer Master Trainer Code	Training Deal	Placement Details
User					
Harry (Training Department)	CRED	CRED	CRED	CRED	
John (Training Department)	CRED, View All	CRED, View All	CRED, View All	CRED, View All	
Robert (Placement L1 Department)	CRED				CRED
Peter (Placement L2 Department)	CRED, View All				CRED, View All
Shekhar (System Administrator)	CRED, View All , Modify All				

1) Training Department(Harry) :

Custom Object Permissions

	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		
Course Masters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Placement Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Student Masters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		
Trainer Masters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Trainer Codes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Training Deals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		



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2) Placement L1 Department(Robert) :

	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		
Course Masters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Placement Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Student Masters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

3) Placement L2 Department(Peter) :

	Custom Object Permissions							
	Basic Access				Data Administration			
	Read	Create	Edit	Delete	View All	Modify All		
Course Masters	<input type="checkbox"/>	<input type="checkbox"/>						
Placement Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Student Masters	<input checked="" type="checkbox"/>	<input type="checkbox"/>						

4) System Administrator (Shekhar)Access:

	Custom Object Permissions							
	Basic Access				Data Administration			
	Read	Create	Edit	Delete	View All	Modify All		
Course Masters	<input checked="" type="checkbox"/>							
Placement Details	<input checked="" type="checkbox"/>							
Student Masters	<input checked="" type="checkbox"/>							

5) Training Department(John) :

John needs Extra “View All “Access. For his Profile (Training Department) only CRED access is given.

I need to create [Permission Set](#) to give ['View All'](#) Access to objects.



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Assigned Users

Training Department Profile(View all Access to John)

[Help for this Page](#)

[« Back to: Permission Set](#)

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | [Other](#) | [All](#)

<input type="checkbox"/> Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager	Expires On
<input type="checkbox"/> Edit	John	John	john25@gmail.com		Sr. Management Acedamics	<input checked="" type="checkbox"/>	Training Department		

Contracts	No Access	23	--
Course Masters	Read, Create, Edit, Delete, View All	8	--

Streaming Channels	No Access	--	--
Student Masters	Read, Create, Edit, Delete, View All	18	--
Subscriptions	--	--	--
Tasks	--	22	--
Time Slots	--	12	--
Trainer Masters	Read, Create, Edit, Delete, View All	15	--
Trainer Codes	Read, Create, Edit, Delete, View All	18	--



PROJECT WORK: STORY 4

Client was earlier using “Oracle” Platform and all business data is on Oracle Platform.

Client wants to transfer all data from Oracle into Salesforce.

Data migration tool like “Data Loader” is used to load data in Objects.

Client has provided data file with few records as of now. As per need data can be added in future.

Business Problems:

(1) Taking Backup of Current data as safer Side :

Right now no data is present to take backup.

(2) Load data in ‘Student Master’ using .CSV file given by client.

The screenshot shows two windows from the Data Loader application. The top window is titled 'Step 4: Finish' and displays a message: 'The operation has fully completed. There were 10 successful inserts and 0 errors.' It includes 'View Successes', 'View Errors', and 'OK' buttons. The bottom window is titled 'Student Masters' and shows a list of 10 items, each with a checkbox and the text 'SDC-10' through 'SDC-19'. The status bar at the bottom of the screen says '10 items • Sorted by Student Code • Filtered by All student masters • Updated a few seconds ago'.

Student Code
1 SDC-10
2 SDC-11
3 SDC-12
4 SDC-13
5 SDC-14
6 SDC-5
7 SDC-6
8 SDC-7
9 SDC-8
10 SDC-9



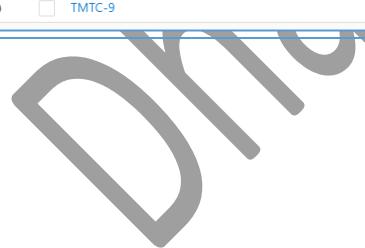
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(3) Load data in ‘Course Master’ using .CSV file given by client.



	<input type="checkbox"/> Course Code ↑	
1	<input type="checkbox"/> CC-10	
2	<input type="checkbox"/> CC-11	
3	<input type="checkbox"/> CC-12	
4	<input type="checkbox"/> CC-2	
5	<input type="checkbox"/> CC-3	
6	<input type="checkbox"/> CC-4	
7	<input type="checkbox"/> CC-5	
8	<input type="checkbox"/> CC-6	
9	<input type="checkbox"/> CC-7	
10	<input type="checkbox"/> CC-8	
11	<input type="checkbox"/> CC-9	

(4) Load data in ‘Trainer Master’ using .CSV file given by client.



	<input type="checkbox"/> Name ↑	
1	<input type="checkbox"/> TMTC-1	
2	<input type="checkbox"/> TMTC-2	
3	<input type="checkbox"/> TMTC-3	
4	<input type="checkbox"/> TMTC-4	
5	<input type="checkbox"/> TMTC-5	
6	<input type="checkbox"/> TMTC-6	
7	<input type="checkbox"/> TMTC-7	
8	<input type="checkbox"/> TMTC-8	
9	<input type="checkbox"/> TMTC-9	



PROJECT WORK: STORY 5

Data Cleaning Process: Student Master

(1).Student's First Name and Last Name is always mandatory.

In order to make fields mandatory, I need to make Field 'Required' in both fields.

**Edit Student Master Custom Field
First Name**

Custom Field Definition Edit Change Field Type | Save | Cancel

Field Information

Field Label	First Name	Data Type	Text
Field Name	First_Name		
Description			
Help Text			
Data Owner	User		
Field Usage	--None--		
Data Sensitivity Level	--None--		
Compliance Categorization	Available PII HIPAA GDPR PCI	Chosen	

General Options

Required Always require a value in this field in order to save a record

Unique Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)
 Treat "ABC" and "abc" as different values (case sensitive)

**Edit Student Master Custom Field
Last Name**

Custom Field Definition Edit Change Field Type | Save | Cancel

Field Information

Field Label	Last Name	Data Type	Text
Field Name	Last_Name		
Description			
Help Text			
Data Owner	User		
Field Usage	--None--		
Data Sensitivity Level	--None--		
Compliance Categorization	HIPAA GDPR PCI COPPA CCPA	Chosen	

General Options

Required Always require a value in this field in order to save a record

Unique Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)
 Treat "ABC" and "abc" as different values (case sensitive)



(2).Client wants phone number should starts with +91,+1,+44,+61 for India, USA, UK and Australia.

Create new picklist field: Country Code For Phone Number

With field values: +91, +1, +61 and +44.

Create Validation rule.

Student Master Validation Rule

[Back to Student Master](#)

Validation Rule Detail		Active	✓
Rule Name	PhoneNumberFormatAsperCountry	Active	✓
Error Condition Formula	<pre>((!SPICKVAL(Country_del__c , 'India')) && NOT(SPICKVAL(Country_Code__c , '+91')) ((!SPICKVAL(Country_del__c , 'USA')) && NOT(SPICKVAL(Country_Code__c , '+1'))) ((!SPICKVAL(Country_del__c , 'UK')) && NOT(SPICKVAL(Country_Code__c , '+44'))) ((!SPICKVAL(Country_del__c , 'Australia')) && NOT(SPICKVAL(Country_Code__c , '+61')))</pre>		
Error Message	Please Select Country Code for phone number in the correct format. Phone number should starts with (+91) INDIA or (+1) USA or (+44) UK or (+61) AUS.	Error Location	Country Code For Phone Number
Description	Intelogik works on Placement from India,UK,USA,Australia.Phone number should starts with +91 or +1 or +44 or +61		

Student Master
SDC-30

* First Name	Santa	Country	USA
* Last Name	Kelly	Street	
Country Code For Phone Number	+44	State	
Please Select Country Code for phone number in the correct format. Phone number should starts with (+91) INDIA or (+1) USA or (+44) UK or (+61) AUS.		City	--None--
Phone	1234567890	Email	



(3).One thing is mandatory either Email or Phone. Keeping both blank is not allowed.

Create Validation rule.

Student Master Validation Rule

[Back to Student Master](#)

Validation Rule Detail	
Rule Name	Email_or_Phone_number_is_Compulsary
Error Condition Formula	ISNULL(Phone__c) ISBLANK(Email__c)
Error Message	Please enter your Email or Phone number
Description	
Created By	Shekhar, 6/25/2021, 8:49 AM

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

New Student Master

Information

Student Code	Owner
*First Name Aditi	Shekhar
*Last Name Sharma	
Phone	
Email	
City Pune	We hit a snag.
Country --None--	Review the errors on this page. • Please enter your Email or Phone number.
Street	<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>



PROJECT WORK: STORY 6

Data Cleaning Process: Course Master

(1).No course should have Duration more than 80 hours.

Create validation rule as shown below.

Course Master Validation Rule

[Back to Course Master](#)

Validation Rule Detail

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

Active

Rule Name	Duration_should_not_be_more_than_80_hours	Error Condition Formula	Duration_in_Hours_c > 80	Error Message	Please enter a course duration of fewer than 80 Hours. Course Duration should not be more than 80 hours. This is not practical in the market as everyone wants quick learning.	Error Location	Duration in Hours
Description		Created By	Shekhar, 6/25/2021, 8:59 AM			Modified By	Shekhar, 6/25/2021, 8:59 AM

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



INTELOGIK-INTERNSHIP PROGRAM

New Course Master

Information

Course Code	Owner
Salesforce	Shekhar
Course Name	
Salesforce	
Duration in Hours	
85.00	

Please enter a course duration of fewer than 80 Hours. Course Duration should not be more than 80 hours. This is not practical in the market as everyone wants quick learning.

Course Fees

We hit a snag.

Review the following fields

- Duration in Hours

Cancel Save & New Save

(2).Fees of Course should be less than 45K for 'Cloud Tech'.

Create validation rule as shown below.

Course Master Validation Rule

[Back to Course Master](#)

Validation Rule Detail

Rule Name	course_fees_less_than_45K_for_cloud	Active	<input checked="" type="checkbox"/>
Error Condition Formula	AND(ISPICKVAL(Category__c, 'Cloud Tech'), Course_Fees__c > 45000)	Error Location	Course Fees
Error Message	Please enter Course fees less than 45000 for "Cloud Tech". Fees of Course should be less than 45K for 'Cloud Tech'. as per market.		
Description			
Created By	<u>Shekhar</u> , 6/25/2021, 9:16 AM	Modified By	<u>Shekhar</u> , 6/25/2021, 9:32 AM



INTELOGIK-INTERNSHIP PROGRAM

New Course Master

Information

Course Code	Owner
Course Name	Shekhar
Salesforce	
Duration in Hours	
Course Fees	\$50,000
Please enter Course fees less than 45000 for "Cloud Tech". Fees of Course should be less than 45K for 'Cloud Tech', as per market.	
Category	Cloud Tech
* Cancel Save & New Save	

(3).Fees of Course should be less than 40K for ‘Mobile Tech’.

Create validation rule as shown below.

Course Master Validation Rule

[Back to Course Master](#)

Validation Rule Detail	
Rule Name	course_fees_less_than_40K_for_mobile
Error Condition Formula	AND(ISPICKVAL(Category__c, 'Mobile Tech'), Course_Fees__c>40000)
Error Message	Please enter Course fees less than 40000 for "Mobile Tech". Fees of Course should be less than 40K for 'Mobile Tech'. as per market.
Description	
Created By	Shekhar, 6/25/2021, 9:36 AM
* Edit Clone	



INTELOGIK-INTERNSHIP PROGRAM

New Course Master

Information

Course Code	Owner
	Shekhar
Course Name	
Salesforce	
Duration in Hours	
Course Fees	
45000	<p>Please enter Course fees less than 40000 for "Mobile Tech". Fees of Course should be less than 40K for 'Mobile Tech', as per market.</p>
Category	
Mobile Tech	

 Cancel Save & New Save

(4).Fees of Course should be less than 35K for ‘Web Tech’.

Create validation rule as shown below.

Course Master Validation Rule

[Back to Course Master](#)

Validation Rule Detail

Rule Name	course_fees_less_than_35K_for_Web	Edit Clone	Active <input checked="" type="checkbox"/>
Error Condition Formula	AND(ISPICKVAL(Category__c, 'WebTech'), Course_Fees__c > 35000)		
Error Message	Please enter Course fees less than 35000 for "WebTech". Fees of Course should be less than 35K for 'Web Tech', as per market.		
Description			
Created By	Shekhar 6/25/2021, 9:37 AM		
	Edit Clone		



INTELOGIK-INTERNSHIP PROGRAM

New Course Master

Information

Course Code	Owner
Course Name	Shekhar
Java	
Duration in Hours	
Course Fees	\$50,000
Please enter Course fees less than 35000 for "WebTech". Fees of Course should be less than 35K for 'Web Tech', as per market.	
Category	Web Tech

* Cancel Save & New Save

(5).Course Name, Fees, Duration, and Category are mandatory.

- Course Name is ‘Required’.

Course Master Custom Field
Course Name

[Back to Course Master](#) [Help for this Page](#)

[Validation Rules \[0\]](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

General Options

Required <input checked="" type="checkbox"/>
Default Value i

- Course Fees is ‘Required’.

Course Master Custom Field
Course Fees

[Back to Course Master](#) [Help for this Page](#)

[Validation Rules \[3\]](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)



INTELOGIK-INTERNSHIP PROGRAM

General Options

Required	<input checked="" type="checkbox"/>
Default Value	<input type="button" value="i"/>

- Duration in Hours is 'Required'.

Course Master Custom Field
Duration in Hours
[Back to Course Master](#)

[Help for this Page](#)

Custom Field Definition Detail

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

General Options

Required	<input checked="" type="checkbox"/>
Default Value	<input type="button" value="i"/>

- Category is 'Required'.

Course Master Custom Field
Category
[Back to Course Master](#)

[Help for this Page](#)

Custom Field Definition Detail

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

General Options

Required	<input checked="" type="checkbox"/>
Default Value	<input type="button" value="i"/>

PROJECT WORK: STORY 7

Data Cleaning Process: Trainer Master

(1). Trainer's experience should be always more than 5 years.

Create Validation rule.



INTELOGIK-INTERNSHIP PROGRAM

Trainer Master Trainer Code Validation Rule

[Back to Trainer Master Trainer Code](#)

Validation Rule Detail

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

Active

Rule Name `experience_should_be_always_more_than_5`

Error Condition Formula `Experience__c < 5`

Error Message Please enter Experience more than 5 years. Trainer's experience should be always more than 5 years to ensure quality.

Error Location Experience

Description

Created By Shekhar, 6/25/2021, 10:06 AM

Modified By Shekhar, 6/25/2021, 10:06 AM

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

New Trainer Master Trainer Code

Information

Name

Owner

Shekhar

First Name

Aditi

Last Name

Sharma

Education

MBA

Experience

4.00

Please enter Experience more than 5 years. Trainer's experience should be always more than 5 years to ensure quality.

Technology of Training

(2).Only BE or ME Trainers are selected for Java, Dot net, and Salesforce.

Create Validation rule.



Trainer Master Validation Rule

[Back to Trainer Master](#)

Validation Rule Detail

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

Rule Name	ValidationRuleForTrainersEducation
Error Condition Formula	(NOT(ISPICKVAL(Education__c,'ME')) ISPICKVAL(Education__c,'BE'))) && (ISPICKVAL(Technology_of_Training__c , 'Dot net') ISPICKVAL(Technology_of_Training__c , 'Salesforce') ISPICKVAL(Technology_of_Training__c , 'Java'))
Error Message	Please select proper education of Trainer Either BE or ME for Selected Technology Training.
Description	Only BE or ME Trainers should be selected for Java, Dotnet, Salesforce

Trainer Master
TMC-12

Education
MSc

Please select proper education of Trainer Either BE or ME for Selected Technology Training.

Experience

Technology of Training
Salesforce

Fees per Student
₹18,000.0

Country
India

Trainer Category
--None--

Ø We hit a snag.

Review the following fields

- Education

Cancel Save

(3). Only BSc or MSc Trainers are allowed for C and CPP.

Create Validation rule.



INTELOGIK-INTERNSHIP PROGRAM

Trainer Master Validation Rule

[Back to Trainer Master](#)

Validation Rule Detail

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

Active

Rule Name ValidationRuleForBScorMSTrainersEducation
Error Condition Formula `(NOT ISPICKVAL(Education__c, 'Msc'))||
ISPICKVAL(Education__c, 'BSc'))
&&
(
ISPICKVAL(Technology_of_Training__c , 'CPP'))||
ISPICKVAL(Technology_of_Training__c , 'C')
)`

Error Message Please select proper education of Trainer Either BSc or MSc for C, CPP Training.
Description Only BSc or MSc Trainers are allowed for C and CPP.

Error Location Education

Created By Shekhar 6/28/2021, 7:06 AM

Modified By Shekhar 6/28/2021, 7:09 AM

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

Education

ME

Please select proper education of Trainer Either BSc or MSc for C, CPP Training.

Experience

Technology of Training

CPP

Fees per Student

₹18,000.0

Country

India

Trainer Category

--None--

We hit a snag.

Review the following fields

- Education

Link In Profile

Cancel Save

(4).Only Indian Trainers are allowed for ‘Tableau’ Training.

Create Validation rule.



INTELOGIK-INTERNSHIP PROGRAM

Trainer Master Validation Rule

[Back to Trainer Master](#)

Validation Rule Detail

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

Active

Rule Name: ValidationRuleForTableauTechnology
Error Condition Formula: (NOT(ISPICKVAL(Country__c , 'India'))
)
 &&
 (
 ISPICKVAL(Technology_of_Training__c , 'Tableau')
))

Error Message: Please select the country as " India" for Tableau Training.
Description: Only Indian Trainers are allowed for 'Tableau' Training.

Error Location: Country

Technology of Training
Tableau

Fees per Student
₹18,000.0

Country
Canada

Please select the country as " India" for Tableau Training.

Trainer Category
--None--

Linked In Profile

Background Check Done(Yes/N)

Verification Status
--None--

We hit a snag.

Review the following fields

- Country

(5).No Trainer should be get fees more than 20K.

Create Validation rule.



Trainer Master Validation Rule

[Back to Trainer Master](#)

Validation Rule Detail

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

Rule Name	Fees_should_not_be_more_than_20K
Error Condition Formula	Fees_per_Student_c > 20000
Error Message	Please enter fees less than 20000 as taxes may apply.
Description	No Trainer should get fees more than 20K as taxes may apply.

Trainer Master
TMTC-12

Technology of Training
Tableau

Fees per Student
₹25,000.0

Please enter fees less than 20000 as taxes may apply.

Country
India

Trainer Category
--None--

Linked In Profile

Background Check Done(Yes/N)

We hit a snag.

Review the following fields

- Fees per Student

Cancel Save

PROJECT WORK: STORY 8



INTELOGIK-INTERNSHIP PROGRAM

Client gave us Data of Students who wants to enrol in Email.

I have created .Csv file where Student's Details like First Name, Last Name, Email, Phone Number, Background etc. is entered.

Data Import Wizard used to load/import records into Salesforce.

The screenshot shows the 'Choose data' step of the Data Import Wizard. On the left, there are tabs for 'Standard objects' and 'Custom objects', with 'Student Masters' selected. In the center, under 'Add new records', 'Match by' is set to '-None-' and 'Which User field in your file designates record owners?' is also set to '-None-'. Under 'Trigger workflow rules and processes?', the checkbox 'Trigger workflow rules and processes for new and updated records' is checked. On the right, a file named 'Student Mastering Deal.csv' is being uploaded. The file type is 'CSV', character code is 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)', and values are separated by 'Comma'. At the bottom right are 'Cancel', 'Previous', and 'Next' buttons.

The screenshot shows the 'Review & Start Import' step of the Data Import Wizard. It displays the following information:

- Your selections:** Student Masters, Add new records, Student Master Records to be entered in Training Deal.csv.
- Your import will include:** Mapped fields: 8.
- Your import will not include:** Unmapped fields: 0.

At the top right, there is a 'Great job!' message and a 'Start import' button. A 'Help for this page' link is located at the bottom right.



INTELOGIK-INTERNSHIP PROGRAM

BULK DATA LOAD JOBS

Job ID: 7515g000000210g2 | **Job Type:** Bulk API | **Status:** Closed

Submitted By	Shekhar	Operation	Insert	Total Processing Time (ms)	78
Start Time	6/28/2021, 8:44 AM PST	Queued Batches	0	API Active Processing Time (ms)	32
End Time	6/28/2021, 8:44 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh:]mm:ss)	00:00	Completed Batches	1		
Object	Student Master	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	5		
Concurrency Mode	Parallel	Records Failed	0		
API Version	52.0	Retries	0		

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	7515g000000210g2	6/28/2021, 8:44 AM	6/28/2021, 8:44 AM	78	32	0	5	0	0	Completed	

Scope of Improvisation: Training Completion Date should be Formula field which return Date which is (Training Start Date + Duration of Course)

(A).Client wants to send automated Email to 'Trainer' when record is created.

This automated mechanism can be achieved using '[Workflow Rules](#)'.



INTELOGIK-INTERNSHIP PROGRAM

(1).As Email has to send to Student, I need to create “Email Template” in Classic.

Preview your email template below.

Email Template Detail

Folder	Unfiled Public Classic Email Templates
Email Template Name	Email_Template_for_Trainer-Course
Template Unique Name	Email_Template_for_Trainer_Course
Encoding	Unicode (UTF-8)
Author	Shekhar (Change)
Description	This email template is created to send information about Student and course Designed to trainee
Created By	Shekhar , 8/29/2021, 4:06 AM

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

Email Template

[Send Test and Verify Merge Fields](#)

Subject | Mr. {!Trainer_Master__c.First_Name__c} {!Trainer_Master__c.Last_Name__c}...Here is Training plan for you.

Plain Text Preview |

Dear {!Trainer_Master__c.First_Name__c} {!Trainer_Master__c.Last_Name__c}....

Greetings From Intelogik!!!!!!!!!!!!!!

There are new entries of students inTraining Program.

Student's Name : {!Student_Master__c.First_Name__c} {!Student_Master__c.Last_Name__c}.

Accordingly, a training plan is designed for you.

Course Name : {!Course_Master__c.Course_Name__c}.

Training Start Date : {!Training_Deal__c.Training_Start_Date__c}.

Training Completion Date : {!Training_Deal__c.Training_Completion_Date__c}.

Thank You!!!!!!!!!

(2).Create Workflow Rule with Evaluation Criteria: Created and Add bare condition i.e [Deal Code <> ISBLANK](#). Activate Workflow Rule.



INTELOGIK-INTERNSHIP PROGRAM

Workflow Rule

WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created

Workflow Rule Detail

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

Rule Name: WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created

Object: Training Deal

Active:

Evaluation Criteria: Evaluate the rule when a record is created

Description: WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created

Rule Criteria: Training Deal: Deal Code NOT EQUAL TO ISBLANK

Created By: Shekhar, 8/29/2021, 2:34 AM

Modified By: Shekhar, 8/29/2021, 8:20 AM

Workflow Actions

[Edit](#)

Immediate Workflow Actions

Type	Description
Email Alert	Email to be Sent to Student regarding Training Plan.
Email Alert	Email to be Sent to Trainer as new Training Plan should be send.

Time-Dependent Workflow Actions [See an example](#)

(3). Create Immediate Workflow Action: New Email Alert.

SETUP

Email Alerts

Description: Email to be Sent to Trainer as new Training Plan should be send.

Unique Name: Email_to_be_Sent_to_Trai

Object: Training Deal

Email Template: Email Template for Trainer

Protected Component:

Recipient Type: search: Email Field for: Find

Recipients: Available Recipients: Email Field: Email of Student
Selected Recipients: Email Field: Email of Trainer

Add Remove

(4)Create new Training Deal records and add Email of Trainer along with proper Course, Student and trainer Details.



INTELOGIK-INTERNSHIP PROGRAM

Information

Deal Code	*Course CC-2
Fees proposed at Initial Discussion	*Student SDC-20
Discount Percentage	Trainer appointed TMTC-1
Discount Reason	Email of Student
Fees Paid by student	Email of Trainer dhanashrikulkarni0915@gmail.com
Deal Risk Status	Training Start Date 7/1/2021
Fees to be paid to Trainer	

(5).As soon as new Training Deal is created, Immediately Email will be send to trainer regarding ‘Training Plan’.

Mr. Ajay Reddy...Here is Training plan for you. Inbox x

 Shekhar dhanashri.gade0915@gmail.com via 91d3qkuqk2hh.5g-5kjw6eao.ap24.bnc.salesforce.com to me ▾

Dear Ajay Reddy....

Greetings From Intelogik!!!!!!!!!!!!!!

There are new entries of students inTraining Program.

Student's Name : Adam Lee.

Accordingly, a training plan is designed for you.

Course Name : Dotnet.

Training Start Date : 7/1/2021.

Training Completion Date : 7/31/2021.

Thank You!!!!!!!!!!!!!!

(B).Client wants to send automated Email to ‘Student’ when new Training Plan is created.

This automated mechanism can be achieved using ‘Workflow Rules’.



INTELOGIK-INTERNSHIP PROGRAM

(1).As Email has to send to Student, I need to create “Email Template” in Classic.

Email Template for Student

Preview your email template below.

Email Template Detail

Folder	Unfiled Public Classic Email Templates	Edit Delete Clone
Email Template Name	Email Template for Student	
Template Unique Name	Email_Template_for_Student	
Encoding	Unicode (UTF-8)	
Author	Shekhar [Change]	
Description	This email template is created to send information about Training course Designed to student.	
Created By	Shekhar 6/28/2021, 9:31 AM	

Email Template Send Test and Verify Merge Fields

Subject | Mr.{!Student_Master__c.First_Name__c} {!Student_Master__c.Last_Name__c}.Here is your Training Course Information..

Plain Text Preview |

Dear {!Student_Master__c.First_Name__c} {!Student_Master__c.Last_Name__c}.

Greetings From Intelogik!!!!!!

Here is your Customised Training Program.

Course Name : {!Course_Master__c.Course_Name__c}.

Training Start Date : {!Training_Deal__c.Training_Start_Date__c}.

Training Completion Date : {!Training_Deal__c.Training_Completion_Date__c}.

Thank You!!!!!!!

(2).Use previously Created Active Workflow Rule with Evaluation Criteria: Created and Added bare condition i.e [Deal Code <> ISBLANK](#).

Workflow Rule Detail

Rule Name	WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created	Object	Training Deal
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created
Description	WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created		
Rule Criteria	Training Deal: Deal Code NOT EQUAL TO ISBLANK		
Created By	Shekhar 6/29/2021, 2:34 AM Modified By Shekhar 6/29/2021, 8:20 AM		

Workflow Actions Edit

Immediate Workflow Actions

Type	Description
Email Alert	Email to be Sent to Studen regarding Training Plan.
Email Alert	Email to be Sent to Trainer as new Training Plan should be send.

Time-Dependent Workflow Actions [See an example](#)

(3). Create Immediate Workflow Action: New Email Alert.



INTELOGIK-INTERNSHIP PROGRAM

Edit Email Alert

Description	Email to be Sent to Student regarding Training Plan.				
Unique Name	Email_to_be_Sent_to_Stude				
Object	Training Deal				
Email Template	Email Template for Student				
Protected Component	<input type="checkbox"/>				
Recipient Type	Search: User for: <input type="button" value="Find"/>				
Recipients	<table border="1"><tr><th>Available Recipients</th><th>Selected Recipients</th></tr><tr><td>User: Harry User: Integration User User: John User: Peter User: Robert User: Security User User: Shekhar</td><td>Email Field: Email of Student</td></tr></table>	Available Recipients	Selected Recipients	User: Harry User: Integration User User: John User: Peter User: Robert User: Security User User: Shekhar	Email Field: Email of Student
Available Recipients	Selected Recipients				
User: Harry User: Integration User User: John User: Peter User: Robert User: Security User User: Shekhar	Email Field: Email of Student				
	<input type="button" value="Add"/> <input type="button" value="Remove"/>				

(4) Create new Training Deal records and add Email of Trainer along with proper Course, Student and trainer Details.

New Training Deal

Information	
Deal Code	*Course <input type="button" value="CC-2"/>
Fees proposed at Initial Discussion	*Student <input type="button" value="SDC-20"/>
Discount Percentage	Trainer appointed <input type="button" value="TMTC-1"/>
Discount Reason	Email of Student <input type="text" value="dhanashrikulkarni0915@gmail.com"/>
Fees Paid by student	Email of Trainer <input type="text"/>
Deal Risk Status	Training Start Date <input type="text" value="7/1/2021"/>
Fees to be paid to Trainer	
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	

(5). As soon as new Training Deal is created, Immediately Email will be send to Student regarding ‘Customised Training Plan’.



INTELOGIK-INTERNSHIP PROGRAM

Mr.Adam Lee.Here is your Training Course Information.. Inbox x

[REDACTED]

Shekhar dhanashri.gade0915@gmail.com via 8crc28nf8btb9y.5g-5kjw6eao.ap24.bnc.salesforce.com to me ▾ 3:48 PM (0 minutes ago) ☆ ↗

Dear Adam Lee.

Greetings From Intelogik!!!!!!

Here is your Customised Training Program.

Course Name : Dotnet.

Training Start Date : 7/1/2021.

Training Completion Date :7/31/2021.

Thank You!!!!!!

Dhanashri

(C).Client wants to create Scheduling Task for Harry after one day of data Entry.



INTELOGIK-INTERNSHIP PROGRAM

(Scope of Improvisation: After Scrum meeting with client, Client wants all immediate actions need to perform by creating Task.

Client found Scheduling Tasks are not benifial.So all-time Dependant actions /work should be done through Email.)

(1).As Email has to send to Harry every time after 1 day of record creation in Training Deal, I need to create “Email Template” in Classic.

Folder Unfiled Public Classic Email Templates

Email Template Name Email send to Harry regarding new Training deal

Template Unique Name Email_send_to_Harry REGARDING_new_Training_deal

Encoding Unicode (UTF-8)

Author Shekhar [Change]

Description This Email Template is designed send to Harry regarding new Training deal created.

Created By Shekhar, 6/29/2021, 9:28 AM

Edit Delete Clone

Email Template Send Test and Verify Merge Fields

Subject | New Training Deal record Information.

Plain Text Preview

Mr.Harry.

Hope you are doing Good!!!!!!!.

Please have a look at the New Training Deal record Information.

Course Code :{!Training_Deal__c.Course__c}

Student Code:{!Training_Deal__c.Student__c}

Trainer Appointed code:{!Training_Deal__c.Trainer_appointed__c}

Fees proposed at Initial Discussion:{!Training_Deal__c.Email_of_Trainer__c}

Discount Percentage :{!Training_Deal__c.Discount_Percentage__c}

Discount Reason : {!Training_Deal__c.Discount_Reason__c}

Thank You!!!!!!!

(2).Use previously Created Active Workflow Rule with Evaluation Criteria: Created and Added bare condition i.e. Deal Code <> ISBLANK.



INTELOGIK-INTERNSHIP PROGRAM

Workflow Rule
WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created

Workflow Rule Detail

Edit	Clone	Deactivate	
Rule Name	WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created	Object	Training Deal
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created
Description	WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created		
Rule Criteria	Training Deal: Deal_Code NOT EQUAL TO ISBLANK		
Created By	Shekhar, 6/29/2021, 2:34 AM		
Modified By	Shekhar, 6/29/2021, 9:42 AM		

Workflow Actions

Edit	
Immediate Workflow Actions	
Type	Description
Email Alert	Email to be Sent to Student regarding Training Plan.
Email Alert	Email to be Sent to Trainer as new Training Plan should be send.
Time-Dependent Workflow Actions See an example	
1 Day After Rule Trigger Date	
Type	Description
Email Alert	Email to be send to Harry after one day of record creation.

(3). Create new Time Dependant Workflow Action: New Email Alert with Time Trigger criteria: 1 Day after Rule Trigger Date.

Time-Dependent Workflow Actions [See an example](#)

1 Day After Rule Trigger Date		
Edit Delete		
Action	Type	Description
Edit Remove	Email Alert	Email to be send to Harry after one day of record creation.
Add Workflow Action ▾		
Add Time Trigger		

(4).Create new Training Deal records and add all proper Course, Student and trainer Details.



INTELOGIK-INTERNSHIP PROGRAM

New Training Deal

Information

Deal Code	*Course CC-2
Fees proposed at Initial Discussion ₹15,000.00	*Student SDC-20
Discount Percentage 1.00%	Trainer appointed TMTC-1
Discount Reason Financial Issue	Email of Student adamLee@gmail.com
Fees Paid by student	Email of Trainer AjayReddy@gmail.com
Deal Risk Status	Training Start Date 6/30/2021
Fees to be paid to Trainer	

Cancel **Save & New** **Save**

Dhanashri

(5).As soon as new Training Deal is created, Email will be send to Harry after 1 day regarding ‘new entry in Training Deals.



INTELOGIK-INTERNSHIP PROGRAM

I can also Monitor Time Dependant Actions as below:

Time-Based Workflow

Monitor the queue of pending automations. To filter the list, enter criteria before you click Search. The queue processes built in Process Builder, and flow resume events.

Workflow Rule, Flow, or Process Name starts with AND **WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created**

<input type="checkbox"/>	Record Name	Object	Workflow Rule, Flow, or Process Name	Scheduled Date	Created By	Created Date	Automation Type
<input type="checkbox"/>	Deal Code-14	Training Deal	WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created	8/30/2021, 9:50 AM	Shekhar	8/29/2021, 9:50 AM	Workflow Actions

New Training Deal record Information.

Inbox



Shekhar dhanashri.gade0915@gmail.com via [6i66qorkq7oh2.5g-5kjw6eao.ap24.bnc.salesforce.com](#)
to me ▾

Mr.Harry.

Hope you are doing Good!!!!!!!!!!!!!!

Please have a look at the New Training Deal record Information.

Course Code :CC-2

Student Code:SDC-20

Trainer Appointed code:TMTC-1

Fees proposed at Initial [Discussion:ajayreddy@gmail.com](#)

Discount Percentage :1

Discount Reason : Financial Issue

Thank You!!!!!!!!!!!!!!

(E).Client wants to create Task for Harry after one day of training started to take feedback from Student about Training.



(1).Use previously Created Active Workflow Rule with Evaluation Criteria:
Created and Added bare condition i.e. Deal Code <> ISBLANK.

Workflow Rule
WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created

Workflow Rule Detail

Rule Name	WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created	Edit	Clone	Deactivate
Active	<input checked="" type="checkbox"/>			
Description	WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created			
Rule Criteria	Training Deal: Deal Code NOT EQUAL TO ISBLANK			
Created By	<u>Shekhar</u> 6/29/2021, 2:34 AM			

Workflow Actions

Immediate Workflow Actions

Type	Description
Task	Take feedback from Student about Training.
Email Alert	Email to be Sent to Studen regarding Training Plan.
Email Alert	Email to be Sent to Trainer as new Training Plan should be send.

(2). Create new Immediate Workflow Action: New Task as below:

Edit Task
Take feedback from Student about Training.

Create a task to associate with one or more workflow rules, approval processes, or entitlement processes. When changing a task, any modifications will affect all associated processes.

[Save](#) [Save & New](#) [Cancel](#)

Edit Task

Object	Training Deal
Assigned To	<input type="text" value="Harry"/> 🔍
Subject	<input type="text" value="Take feedback from Studen"/>
Unique Name	<input type="text" value="Take_feedback_from_Studen"/> 🔗
Due Date	Training Deal: Training Start Date ▼ [plus ▼] [3] days
Protected Component	<input type="checkbox"/>

Description Information

Comments	Take feedback from Students about Training.
----------	---

(3). As soon as new Training Deal is created, Task will be created for Harry ‘to take feedback from Student’ after 3 days of Training Starting Date.



INTELOGIK-INTERNSHIP PROGRAM

Training Deal
Deal Code-15

New Contact Edit New Opportunity ▾

Related	Details
Deal Code	Course
Deal Code-15	CC-2
Fees proposed at Initial Discussion	Student
	SDC-20
Discount Percentage	Trainer appointed
	TMT-1
Discount Reason	Email of Student
Fees Finalized for student	Email of Trainer
₹0.00	
Fees Paid by student	Training Start Date
₹0.00	6/25/2021
Fees Pending by Student	Training Completion Date
₹0.00	7/25/2021
Deal Risk Status	
Fees to be paid to Trainer	

Activity

New Event New Task Log a Call Email

Set up an event... Add

Filters: All time • All activities • All types ▾

Refresh • Expand All • View All

Upcoming & Overdue

Take feedback from Stu... Yesterday

Harry has an upcoming task

No past activity. Past meetings and tasks marked as done show up here.

Task **Take feedback from Student about Training.**

Name Related To
Deal Code-15

Details Related

Assigned To **Harry**

Subject **Take feedback from Student about Training.**

Due Date **6/28/2021**

Priority **Normal**

Created By **Shekhar, 6/29/2021, 10:26 AM**

Comments **Take feedback from Students about Training.**



PROJECT WORK: STORY 9

Client wants to Auto-Populate ‘Trainer Category’ fields on selecting Trainers Experience field.

This business requirement can be achieved by creating new Process using Process Builder- Update records.

(Scope of Modification: As per Client’s requirement I have created Validation rule to cease user from entering bad data in ‘Trainer Experience’ Field which is Experience < 5. In this Condition 4 is contradicting to that Validation Rule. So we need to leave that condition. As part of Process we can add this condition but it will not execute at any point of time)

I need to create new process using Process Builder.

Process Name		Auto-Populating Trainer Category on selecting Experience.
Object Name		Trainer Master
Specify When to Start the Process		Only when Record is created or edited
Module 1:	Criteria	Trainers’ Experience >15 <ul style="list-style-type: none">• Immediate Action Update Record: Trainer’s Category = Platinum
Module 2:	Criteria	Trainer’s Experience >10 && Trainer’s Experience <=15 <ul style="list-style-type: none">• Immediate Action Update Record: Trainer’s Category = Gold
Module 3:	Criteria	Trainer’s Experience >5 && Trainer’s Experience <=10 <ul style="list-style-type: none">• Immediate Action Update Record: Trainer Category = Silver



INTELOGIK-INTERNSHIP PROGRAM

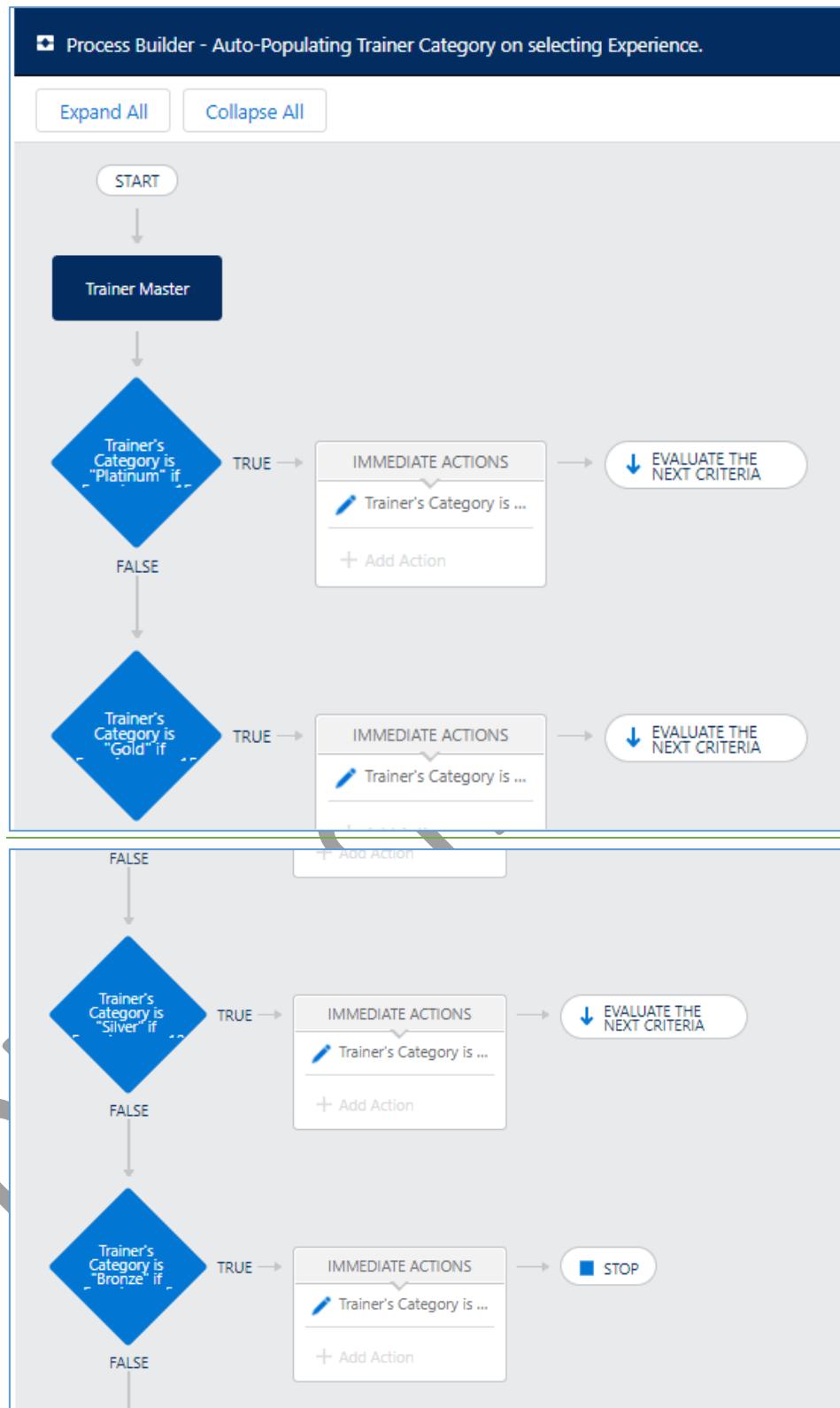
Module 4:		Criteria	Trainer's Experience < 5
	• Immediate Action		Update Record: Trainer's Category = Bronze

- 1). Select Object:
- 2). Add rule Criteria and choose Immediate action.
- 3). Activate the Process. Once the Process is activated it will perform Action as soon as Condition given in Process is satisfied.

Dhanashri Gade



INTELOGIK-INTERNSHIP PROGRAM





INTELOGIK-INTERNSHIP PROGRAM

(1).Client wants to create Auto populate Trainer's Category “Platinum” on entering Experience more than 15.

Process will be activated once this condition is met and result is shown as follows.

Trainer Master
TM-13

TM-13	
First Name	Aditi
Last Name	Sharma
Education	BE
Experience	16.0
Technology of Training	Dot net
Fees per Student	
Country	
Trainer Category	Platinum
Linked In Profile	

(2).Client wants to create Auto populate Trainer's Category as “Gold” on entering Experience more than or equal to 10 and less than 15.

Process will be activated once this condition is met and result is shown as follows.

Trainer Master
TM-13

Name	TM-13
First Name	Aditi
Last Name	Sharma
Education	BE
Experience	12.0
Technology of Training	Dot net
Fees per Student	
Country	
Trainer Category	Gold
Linked In Profile	



INTELOGIK-INTERNSHIP PROGRAM

(3).Client wants to create Auto populate Trainer's Category as “Silver” on entering Experience more than or equal to 5 and less than 10.

Process will be activated once this condition is met and result is shown as follows.

Name	TM-13
First Name	Aditi
Last Name	Sharma
Education	BE
Experience	8.0
Technology of Training	Dot net
Fees per Student	
Country	
Trainer Category	Silver

(4).Client wants to create Auto populate Trainer's Category as “Bronze” on entering Experience less than 5.

This is contradicting to validation rule which states that Trainer's experience can't be less than 5 years.

So this condition will be ignored.



PROJECT WORK: STORY 10

Client wants marketing team should get to know which student has potential to get placed quickly depending on Student's City and Background and accordingly "Placement Rating Scope" field should be auto populated.

This can be achieved by creating Process using process builder.

Process Name		Process To determine Placement Scope
Object Name		Student Master
Specify When to Start the Process		Only when Record is created or edited
Module 1:	Criteria	(City = Any) && (Background = Engineering)
• Immediate Action		Update Record: Placement Rating Scope = HIGH
Module 2:	Criteria	(City = Any) && (Background = Management)
• Immediate Action		Update Record: Trainer's Category = MEDIUM
Module 3:	Criteria	(City = Any) && (Background = Banking)
• Immediate Action		Update Record: Trainer Category = LOW
Module 4:	Criteria	(City <> Pune , New York ,Landon , Sydney) && (Background = Engineering)



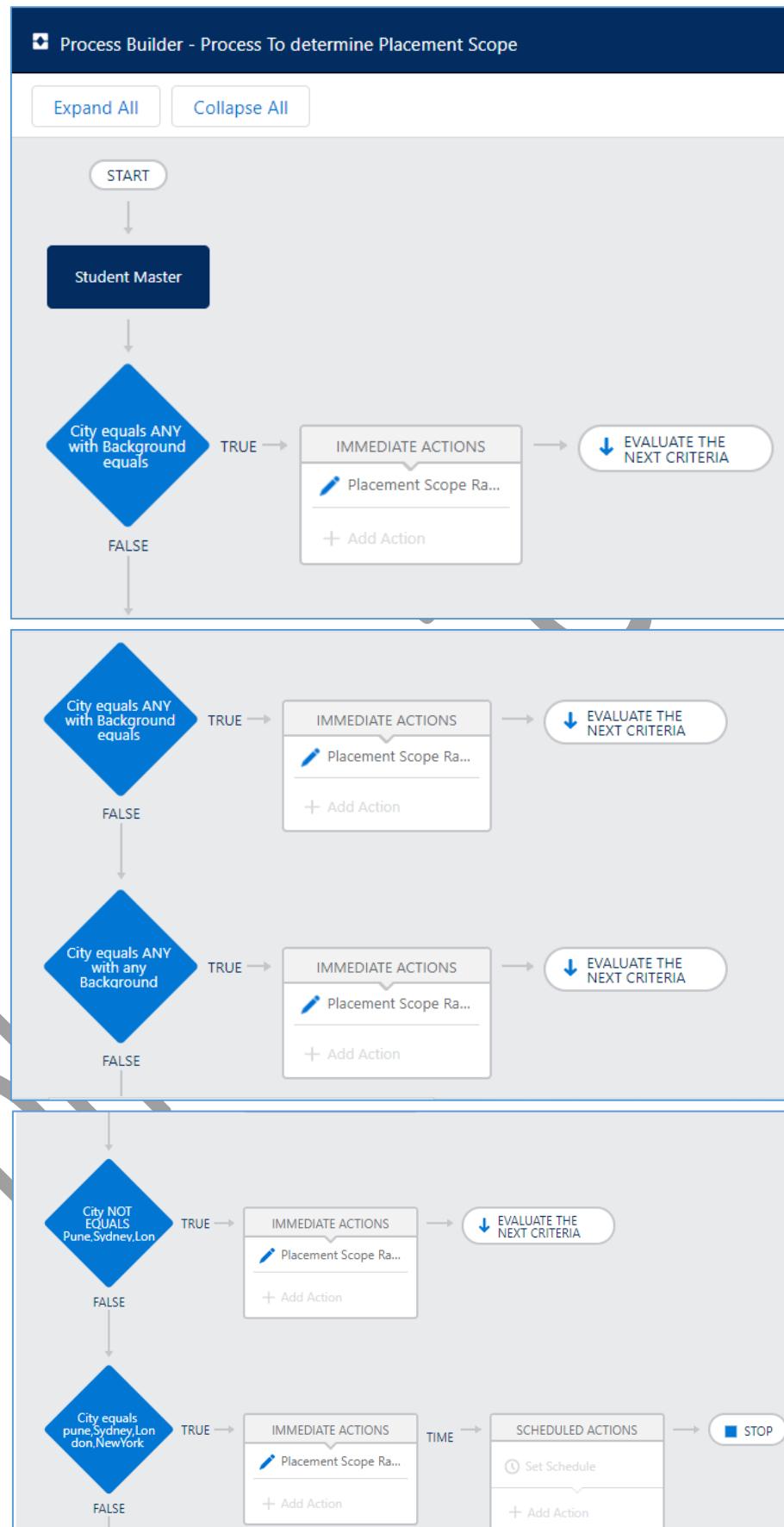
INTELOGIK-INTERNSHIP PROGRAM

<ul style="list-style-type: none">• Immediate Action		Update Record: Trainer's Category = MEDIUM
Module 5:	Criteria	(City=Pune New York Landon Sydney) && (Background=Any)
<ul style="list-style-type: none">• Immediate Action		Update Record: Trainer Category = HIGH

Using above conditions if two conditions are satisfying then lower value will be considered. This can be done by selecting "Evaluate next Criteria" once any condition is True. So that even after Action is performed on condition criteria, it will evaluate next condition.



INTELOGIK-INTERNSHIP PROGRAM





INTELOGIK-INTERNSHIP PROGRAM

Process Name: Process to determine Placement Scope.

(1). If (City = Any) && (Background = Engineering) Then Placement Rating Scope: HIGH

This will be First Condition criteria in Process Builder Process.

Set Conditions

Field *	Operator *	Type *	Value *
[Student_Master_c.Q]	Equals	Picklist	Engineering
[Student_Master_c.Q]	Is null	Boolean	False

+ Add Row

Conditions *

All of the conditions are met (AND)
 Any of the conditions are met (OR)
 Customize the logic

Logic *

1 AND 2

Once this condition is satisfied “Update Records “Action is performed as
Placement Rating Scope: HIGH

Action Name * **Placement Scope Rating = HIGH def**

Record * **[Student_Master_c]**

Criteria for Updating Records *

Updated records meet all conditions
 No criteria—just update the records!

Set new field values for the records you update

Field *	Type *	Value *
Placement Scope Rating	String	HIGH

+ Add Row



(2). If (City = Any) && (Background = Management) Then Placement Rating Scope: MEDIUM

This will be Second Condition criteria in Process Builder Process.

This will be executed when first Condition Criteria is False.

Set Conditions

Field *	Operator *	Type *	Value *
[Student_Master_Q]	Equals	Picklist	Management
[Student_Master_Q]	Is null	Boolean	False

+ Add Row

Conditions *

All of the conditions are met (AND)
 Any of the conditions are met (OR)
 Customize the logic

Logic * 1 AND 2

Once this condition is satisfied “Update Records “Action is performed as
Placement Rating Scope: MEDIUM

Action Name * Placement Scope Rating = MEDIUM

Record * [Student_Master_c]

Criteria for Updating Records *

Updated records meet all conditions
 No criteria—just update the records!

Set new field values for the records you update

Field *	Type *	Value *
Placement Scope Rating	String	MEDIUM

+ Add Row



(3). If (City = Any) && (Background = Banking) Then Placement Rating Scope: LOW

This will be Third Condition criteria in Process Builder Process.

This will be executed when 1 and 2 Condition Criteria is False.

Set Conditions

Field *	Operator *	Type *	Value *
1 [Student_Mast...Q]	Equals	Picklist	Banking
2 [Student_Mast...Q]	Is null	Boolean	False

+ Add Row

Conditions *

All of the conditions are met (AND)
 Any of the conditions are met (OR)
 Customize the logic

Logic *

1 AND 2

Once this condition is satisfied “Update Records “Action is performed as
Placement Rating Scope: LOW

Action Name * Placement Scope Rating IS LOW

Record * [Student_Master__c]

Criteria for Updating Records *

Updated records meet all conditions
 No criteria—just update the records!

Set new field values for the records you update

Field *	Type *	Value *
Placement Scope Rating	String	LOW

+ Add Row



(4).If (City <> Pune, New York, London, Sydney) && (Background = Engineering) Then Placement Rating Scope: MEDIUM

This will be Fourth Condition criteria in Process Builder Process.

This will be executed when 1 and 2 and 3 Condition Criteria is False.

Set Conditions

Field *	Operator *	Type *	Value *
1 [Student_Master_Q]	Does not equal ▾	Picklist	Pune
2 [Student_Master_Q]	Does not equal ▾	Picklist	NewYork
3 [Student_Master_Q]	Does not equal ▾	Picklist	Sydney
4 [Student_Master_Q]	Does not equal ▾	Picklist	London
5 [Student_Master_Q]	Equals ▾	Picklist	Engineering

+ Add Row

Conditions *

All of the conditions are met (AND)
 Any of the conditions are met (OR)
 Customize the logic

Logic * (1 OR 2 OR 3 OR 4) AND 5

Once this condition is satisfied “Update Records “Action is performed as
Placement Rating Scope: MEDIUM

Action Name * Placement Scope Rating = MEDIUM

Record * [Student_Master_c]

Criteria for Updating Records *

Updated records meet all conditions
 No criteria—just update the records!

Set new field values for the records you update

Field *	Type *	Value *
Placement Scope Rating	String	MEDIUM

+ Add Row



(5). If (City = Pune OR New York OR London OR Sydney)&&(Background = Engineering OR Management OR Banking) Then Placement Rating Scope: HIGH

This will be Fifth Condition criteria in Process Builder Process.

This will be executed when 1 and 2 and 3 and 4 Condition Criteria is False.

Define Criteria for this Action Group

Field	Operator	Type	Value
1 [Student_Master_c]	Equals	Picklist	Pune
2 [Student_Master_c]	Equals	Picklist	NewYork
3 [Student_Master_c]	Equals	Picklist	London
4 [Student_Master_c]	Equals	Picklist	Sydney
5 [Student_Master_c]	Equals	Picklist	Engineering
6 [Student_Master_c]	Equals	Picklist	Management
7 [Student_Master_c]	Equals	Picklist	Banking

+ Add Row

Conditions*

All of the conditions are met (AND)
 Any of the conditions are met (OR)
 Customize the logic

Logic* (1 OR 2 OR 3 OR 4) AND (5 OR 6 OR 7)

Once this condition is satisfied “Update Records “Action is performed as Placement Rating Scope: HIGH

Action Name* Placement Scope Rating = HIGH def

Record* [Student_Master_c]

Criteria for Updating Records*

Updated records meet all conditions
 No criteria—just update the records!

Set new field values for the records you update

Field	Type	Value
Placement Scope Rating	String	HIGH

+ Add Row



INTELOGIK-INTERNSHIP PROGRAM

Condition 1:

Email adamlee@gmail.com	City Mumbai
▼ Student's Training Details Section	
Java Ref ID	
▼ Student's Professional Details Section	
Placement Scope Rating HIGH	Background Engineering

Condition 2:

Email adamlee@gmail.com	City Mumbai
▼ Student's Training Details Section	
Java Ref ID	
▼ Student's Professional Details Section	
Placement Scope Rating MEDIUM	Background Management

Condition 3:

Email adamlee@gmail.com	City Mumbai
▼ Student's Training Details Section	
Java Ref ID	
▼ Student's Professional Details Section	
Placement Scope Rating LOW	Background Banking



INTELOGIK-INTERNSHIP PROGRAM

Condition 4:

Email adamlee@gmail.com	City New Jersey
▼ Student's Training Details Section	
Java Ref ID	
▼ Student's Professional Details Section	
Placement Scope Rating MEDIUM	Background Engineering

Condition 5:

Email adamlee@gmail.com	City Pune
▼ Student's Training Details Section	
Java Ref ID	
▼ Student's Professional Details Section	
Placement Scope Rating HIGH	Background Engineering



PROJECT WORK: STORY 11

Client wants to track deal details efficiently on “Training Deal “Object. And depending on certain conditions become True, Field should be updated with value.

This can be achieved by creating Process using process builder.

Process Name		Process to determine Deal Risk Status
Object Name		Student Master
Specify When to Start the Process		Only when Record is created or edited
Module 1:	Criteria	(City = Any) && (Background = Engineering)
<ul style="list-style-type: none">• Immediate Action		Update Record: Placement Rating Scope = HIGH
Module 2:	Criteria	(City = Any) && (Background = Management)
<ul style="list-style-type: none">• Immediate Action		Update Record: Trainer's Category = MEDIUM
Module 3:	Criteria	(City = Any) && (Background = Banking)
<ul style="list-style-type: none">• Immediate Action		Update Record: Trainer Category = LOW
Module 4:	Criteria	(City <> Pune , New York ,Landon , Sydney) && (Background = Engineering)
<ul style="list-style-type: none">• Immediate Action		Update Record:



INTELOGIK-INTERNSHIP PROGRAM

		Trainer's Category = MEDIUM
Module 5:	Criteria	(City=Pune New York Landon Sydney) && (Background=Any)
• Immediate Action		Update Record: Trainer Category = HIGH

Process Name: Process to determine Deal Risk Status

Sr no	Conditions	Deal Risk Status
1.	Fees Pending by Student > (50 % (Course Fees))	HIGH
2.	(Discount Percentage > 20) && (Fees is Pending by Student)	MID
3.	(Discount Percentage = 0) && (Fees is Pending by Student) && (Training Completion Date has passed)	LOW

When formula evaluates 'True' then only Update Record action will take place.



PROJECT WORK: STORY 12

Client wants same Candidate should not be apply for other companies if Candidate is already placed in any Company.

(1) To achieve this, I have created Roll Summary field (Count of Placement Details) on Master object: Student Master which will count number of placement records with that Placement record.

Candidate

Custom Field Definition Detail	
Edit Set Field-Level Security View Field Accessibility Where is this used?	
Field Information	
Field Label	Count of Placement Details
Field Name	Count_of_Placement_Details
API Name	Count_of_Placement_Details_c
Description	This roll-up summary will give you a count of the number of Companies .
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Shekhar, 6/29/2021, 12:01 PM
Modified By	Shekhar, 6/29/20
Roll-Up Summary Options	
Data Type	Roll-Up Summary
Summarized Object	Placement Detail
Filter Criteria	
Summary Type	COUNT

(2).I have created on validation Rule as follows:

DRAFT

Validation Rule Name	One_Candidate_should_apply_to_one_job
Condition	Count_of_Placement_Details__c > 1
Error Message	Sorry! You cannot apply for Job in this Company as you have already got an offer from Other Company.



INTELOGIK-INTERNSHIP PROGRAM

Student Master Validation Rule

[Back to Student Master](#)

Validation Rule Detail

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

Rule Name	One_Candidate_should_apply_to_one_job	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Count_of_Placement_Details__c > 1		
Error Message	Sorry! You can not apply for Job in this Company as you have already got an offer from Other Company.	Error Location	Top of Page
Description	One Candidate should apply to one job to get a fair opportunity to other Candidates.		
Created By	Shekhar, 6/29/2021, 12:08 PM	Modified By	Shekhar, 6/29/2021, 12:08 PM

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

(3).Once same candidate is trying to apply for other company, that Candidate will be restricted from doing so.

Placement Detail
PC-1

Placement Detail Detail

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

Placement Code	PC-1	Promotional Field	<input type="checkbox"/>
Student	SDC-20	Salary Achieved	
Technology	CC-2	Country of Placement	UK
Company Name	Oracle	Last Modified By	Shekhar,
Created By	Shekhar,		

Student Master

[View](#) [Edit](#)

First Name	Adam
Last Name	Lee
Company	Oracle

New Placement Detail

Information

Placement Code	Promotional Field
* Student	<input type="checkbox"/>
SDC-20	Salary Achieved
Technology	Country of Placement
CC-2	UK
Company Name	
Accenture	

We hit a snag.

Review the errors on this page.

- Sorry! You can not apply for Job in this Company as you have already got an offer from Other Company.

Cancel **Save & New** **Save**



PROJECT WORK: STORY 13

Client wants 'Fees to be paid to Trainer' should not be more than 'Fees Finalised for student' in Training Deal Object.

It will be loss to Company.

But in some Cases CEO: Shekhar can decide to give leverage to that Trainer or not.

Validation Rule Name	ValidationRuleForFeesOfTrainer
Condition	(\$UserRole.Name <> 'CEO') && (Fees_to_be_paid_to_Trainer__c > Fees_Finalised_for_student__c)
Error Message	Sorry!!! Please enter Trainer's fees less than Student's Fees.

(1).This can be achieved by creating Validation Rule on 'Training Deal' Object where we will bypass this rule only for Shekhar as below:

Training Deal Validation Rule

[Back to Training Deal](#)

Validation Rule Detail

Rule Name: ValidationRuleForFeesOfTrainer

Error Condition Formula:
(\$UserRole.Name <> 'CEO')
 &&
 (Fees_to_be_paid_to_Trainer__c > Fees_Finalised_for_student__c)

Error Message: Sorry!!! Enter Student Trainer's fees less than Student's Fees.

Description: Fees to be paid to Trainer' should not be more than 'Fees Finalised for student'

Created By: Shekhar, 6/29/2021, 1:08 PM

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



INTELOGIK-INTERNSHIP PROGRAM

(2) Error Message Shown for “John” who’s Role: Sr. Management Academics.

Personal Issue

Fees Finalised for student
₹14,550.0

This field is calculated upon save

Fees Paid by student

Fees Pending by Student
₹14,550.00

This field is calculated upon save

Deal Risk Status

Fees to be paid to Trainer
₹15,000.00

Sorry!!! Enter StudentTrainer's fees less than Student's Fees.

(3) CEO can save data without getting any Error.

Discount Reason

Personal Issue

Fees Finalised for student
₹14,550.0

Fees Paid by student

Fees Pending by Student
₹14,550.00

Deal Risk Status

Fees to be paid to Trainer
₹15,000.00

Created By



PROJECT WORK: STORY 14

Client wants Collaborative work platform in Salesforce.

This can be achieved by using “Chatter” option. By clicking on pen icon in LEX and + icon in CEX we can add Chatter Tab on Tab bar.

(1).Training Team wants to work in Private Mode and all User from ‘Training Department’ should use this platform for discussion.

Group Name: Company Training Discussion

I have created new Chatter group which is **Private**.

Uploaded Image for group

Added members to Group from Training Department: John,Harry.

The screenshot shows the Salesforce Chatter Groups interface. At the top, there's a navigation bar with links like Home, Student Masters, Course Masters, Placement Details, Trainer Masters, Training Deals, and a plus sign. Below the navigation is a search bar and a 'Switch' button. The main content area shows a breadcrumb path: Chatter > Groups > Company Training Discussion. The group is labeled as 'Private'. On the left, there's a sidebar with 'Group Settings', 'Group Report', 'Group Engagement', and 'Email Me...'. The main area has sections for 'Information' and 'Description', both containing the same text: 'Training Team wants to work in Private Mode and all User from ‘Training Department’ should use this platform for discussion'. The 'Description' section also includes a 'Write a comment...' input field. The right side of the screen shows the Chatter feed. A red box highlights the feed area where two users, Shekhar and Harry, are posting comments. Shekhar says 'Hi! Team! Welcome to Training Discussion Group' and Harry replies 'Thank You!!!!'. Below the feed, there are sections for 'Owner', 'Members' (with three user icons), 'Add/Remove Members', 'Change Roles', 'Group Records' (empty), and 'Group Files' (empty). There's also a 'Share' button and a 'Help for this Page' link.



INTELOGIK-INTERNSHIP PROGRAM

(2).Placement Team wants to work in Open Mode and all Company Users can use this platform for discussion.

Group Name: Company Placement Discussion

I have created new Chatter group which is **Public**.

Uploaded Image for group.

This group is open group .Any user from Company can participate in discussion in this group without request to join.

The screenshot shows the Chatter group interface for 'Company Placement Discussion'. The group was created by Shekhar. Three comments are visible:

- Shekhar**: Hi All.Welcome to Placement grupu.
- Harry**: Thank you!!!!!!!1
- Peter**: Hi Team.Hope all are doing good and Stay Safe

The interface includes a sidebar with Group Settings, Group Report, Group Engagement, and Email Me... options. The main area shows posts, files, and events. The right sidebar displays the owner (Shekhar), members (1), group records (none), and group files (none).



PROJECT WORK: STORY 17

Client wants keep track of Sensitive Field changes like Fees per Student, Course Fees or Discount percentage.

I have created Field tracking in Course Master, Training Deals objects.

(1).Edit Course Master Object and check “Track Field History”.

The screenshot shows the 'Course Master' object setup page in the Salesforce Object Manager. The 'Object Name' is set to 'Course_Master'. In the 'Optional Features' section, the 'Track Field History' checkbox is checked. Other options like 'Allow Reports' and 'Allow Activities' are also present but unchecked.

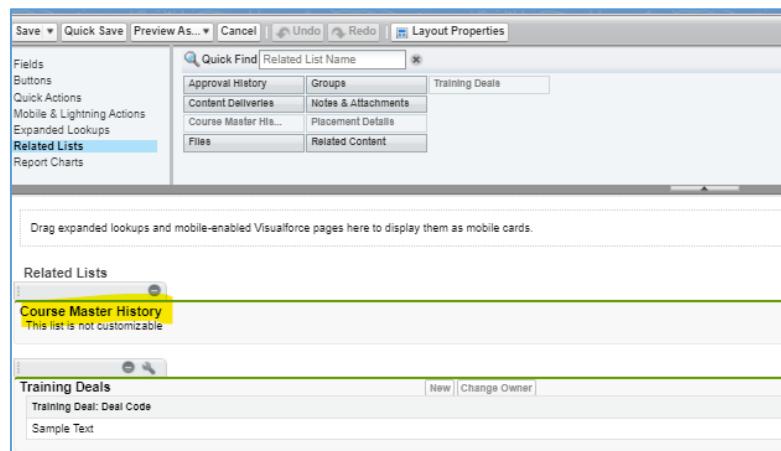
(2).Click on Fields and Relationships and there click on ‘Set History Tracking’. Select Fields to track like Course Fees and Duration.

The screenshot shows the 'Course Master Field History' configuration screen. Under the 'Track old and new values' section, 'Course Fees' and 'Duration in Hours' are selected for tracking. A 'Category' checkbox is also present but unchecked. The 'Save' and 'Cancel' buttons are at the bottom right.



INTELOGIK-INTERNSHIP PROGRAM

(3).Click on Page layout .Click on Related List .Here there will be option called “Course Master History” . Drag and drop in Related List Section.



(4).Any Change in Selected will come under Course Master History as below:

Salesforce screenshot showing the 'Course Master' record page. The 'Related' tab is selected, displaying the 'Course Master History' section. One entry is shown:

Date	Field	User	Original Value	New Value
6/30/2021, 11:30 AM	Course Fees	Shekhar	₹25,000.00	₹23,000.00

[View All](#)

Salesforce screenshot showing the 'Training Deal' record page. The 'Related' tab is selected, displaying the 'Training Deal History' section. One entry is shown:

Date	Field	User	Original Value	New Value
6/30/2021, 11:46 AM	Discount Percentage	Shekhar	3.0000%	5.0000%

[View All](#)



PROJECT WORK: STORY 18

Client wants PAN Card details should be encrypted as it is sensitive Information. This Encrypted data can be seen by seniors in Company which is encrypted.

We have to use **Shield Platform Encryption Mechanism** so as to decrypt PAN number to seniors.

(1).PAN card details should be encrypted for all users. Only Last 4 Numbers should be visible.

This can be achieved by Text (encrypted) field for PAN Card Number.

PAN Card Number

Back to Student Master

Validation Rules [0]

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information		Object Name	Student Master
Field Label	PAN Card Number	Data Type	Text (Encrypted)
Field Name	PAN_Card_Number		
API Name	PAN_Card_Number_c		
Description	This is the PAN card number shown in encrypted format		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Shekhar 6/30/2021, 10:31 AM	Modified By	Shekhar, 6/30/2021, 10:31 AM
General Options			
Required	<input type="checkbox"/>		
Mask Type	Last Four Characters Clear		
Mask Characters	*		

(2).PAN Card Details can be visible by seniors in Company.

I have created Permission Set where System Permissions should be given i.e.

Customise Application and Manage Encrypted Key.

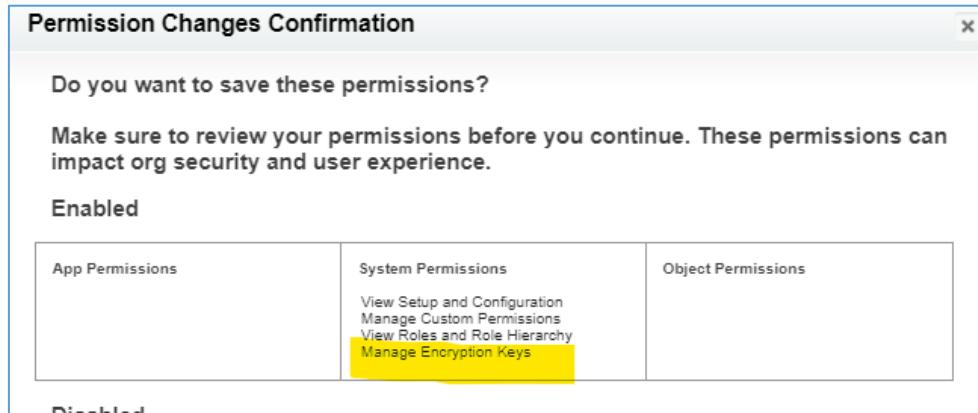
Only for USER license = Salesforce It will work.

Customize Application Customize the organization using App Setup menu options.

Manage Encryption Keys Manage tenant secrets.



INTELOGIK-INTERNSHIP PROGRAM



SETUP
Key Management

Key Management

Shield Platform Encryption helps you meet compliance requirements by adding another layer of protection to data. Before you get started, read the [Shield Platform Encryption best practices](#) and [tradeoffs](#) in Salesforce Help.

To begin, select the kind of key material you want to generate or manage.

Choose Tenant Secret Type **Data in Salesforce**

These keys encrypt data stored in the Salesforce database. This includes data in fields, files, and attachments.

Key Management							Key Management Help (?	
Actions		Version	Tenant Secret Type	Status	Key Material Source	Key Derivation	Created By	Last Modified By
Export		1	Data in Salesforce	Active	HSM	✓	Peter, 6/30/2021, 11:02 AM	Peter, 6/30/2021, 11:02 AM

Dhanashri



PROJECT WORK: STORY 19

Client wants centralized way to work on Country field because Business is growing and many new entries are taking place in country field. Whenever new country value is added in any object, it is becoming difficult for client to add this new value in all concerned/related objects.

The solution will be we need to promote local Picklist: Country to Global Picklist Value Set.

Whenever new Country Value is added into “Global Picklist Value Set”, it will show same changes in all other Country Picklist.

We need to Promote Local Picklist to Global Picklist.

(1).Create new Picklist Value Set: Country (Global PL Set)

Picklist Value Sets

Global Value Set Detail

Information

Label	Country(Global PL Set)
Name	Country_Global_PL_Set
Description	This Picklist is designed as Global Picklist.

Picklist Values Used

Active and inactive picklist values 5 (1,000 max)

Values

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	India	India	<input type="checkbox"/>	Assigned dynamically	Shekhar, 6/30/2021, 8:51 AM
Edit Del Deactivate	USA	USA	<input type="checkbox"/>	Assigned dynamically	Shekhar, 6/30/2021, 8:51 AM
Edit Del Deactivate	UK	UK	<input type="checkbox"/>	Assigned dynamically	Shekhar, 6/30/2021, 8:51 AM
Edit Del Deactivate	Australia	Australia	<input type="checkbox"/>	Assigned dynamically	Shekhar, 6/30/2021, 8:51 AM
Edit Del Deactivate	Canada	Canada	<input type="checkbox"/>	Assigned dynamically	Shekhar, 6/30/2021, 8:51 AM



INTELOGIK-INTERNSHIP PROGRAM

(2).Promote all Country Picklist in [Trainer Master](#), [Student Master](#), [Placement Details](#) objects with Global PL Set.

Picklist Options

Restrict picklist to the values defined in the value set [i](#)

**Edit Trainer Master Custom Field
Country**

Custom Field Definition Edit [Change Field Type](#) [Promote to Global Value Set](#) [Save](#) [Cancel](#)

Field Information

Field Label	Country	Data Type	Picklist
Field Name	Country		
Description			
Help Text			
Data Owner	User	i	
Field Usage	--None--	i	
Data Sensitivity Level	--None--	i	
Compliance Categorization	Available PII	Chosen	i

(3).All three Country Picklist is changed to Global picklist Value Set to Centralise Country Value.

**Trainer Master Custom Field
Country**

[Back to Trainer Master](#)

[Validation Rules](#) [i](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Country	Object Name	Trainer Master
Field Name	Country	Data Type	Picklist
API Name	Country__c	Global Value Set	Country(Trainer Master)
Description			
Help Text			
Data Owner			
Field Usage			

**Placement Detail Custom Field
Country of Placement**

[Back to Placement Detail](#)

[Validation Rules](#) [i](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Country of Placement	Object Name	Placement Detail
Field Name	Country_of_Placement	Data Type	Picklist
API Name	Country_of_Placement__c	Global Value Set	Country(Placement Detail)
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Shethar		Created On 6/24/2021, 8:21 PM
Modified By	Shethar		Modified On 6/30/2021, 9:42 AM

**Student Master Custom Field
Country**

[Back to Student Master](#)

[Validation Rules](#) [i](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Country	Object Name	Student Master
Field Name	Country_del	Data Type	Picklist
API Name	Country_del__c	Global Value Set	Country
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Values [View Country\(Trainer Master\) Value Set](#)

Values	API Name	Default	Chart Colors
Australia	Australia	<input type="checkbox"/>	Assigned dynamically
Canada	Canada	<input type="checkbox"/>	Assigned dynamically
India	India	<input type="checkbox"/>	Assigned dynamically
UK	UK	<input type="checkbox"/>	Assigned dynamically
USA	USA	<input type="checkbox"/>	Assigned dynamically



PROJECT WORK: STORY 20

Client wants data in ‘Fees per Student’ field should not be changed in ‘Trainer Master’.

Only Users with “System Administrator” profile can change this field.

- (1).This can be achieved by creating “Validation Rule” on ‘Trainer Master’ Object where we will bypass this rule only for “System Administrator” profile as below:

Validation Rule Name	ValidationRuleForFeesPerStudentField
Condition	<code>\$Profile.Name <>'System Administrator')</code> <code>&&</code> <code>(ISCHANGED(Fees_per_Student__c))</code>
Error Message	Sorry!!! You are not Authorised person to change Fees per Student.

Trainer Master Validation Rule

[Back to Trainer Master](#)

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

Validation Rule Detail

Rule Name	ValidationRuleForFeesPerStudentField
Error Condition Formula	<code>\$Profile.Name <>'System Administrator')</code> <code>&&</code> <code>(ISCHANGED(Fees_per_Student__c))</code>
Error Message	Sorry!!! You are not Authorised person to change Fees per Student.
Description	data in the ‘Fees per Student’ field should not be changed.
Created By	Shekhar, 6/29/2021, 1:55 PM

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



INTELOGIK-INTERNSHIP PROGRAM

(2) Error Message Shown for “Harry” who’s Profile: [Training Department](#).

The screenshot shows a web-based application interface for 'Trainer Master' named 'TM-14'. At the top, there's a navigation bar with links for Home, Student Masters, Course Masters, Trainer Masters (which is the active tab), and Training Deals. A user profile at the top right indicates 'Logged in as Harry (harry25@gmail.com)' with a 'Log out as Harry' option. The main content area displays fields for Technology of Training (Java), Fees per Student (₹10,000.0), Country (India), Trainer Category (Bronze), and Linked In Profile. A modal window titled 'We hit a snag.' appears, stating 'Review the following fields' with a bullet point 'Fees_per_Student'. Below the modal are 'Cancel' and 'Save' buttons.

(3) "System Administrator" can save data without getting any Error.

This screenshot shows the same 'Trainer Master' profile for 'TM-14' but from the perspective of a system administrator. The 'Details' tab is selected, and the form fields are filled with different values: Name (TM-14), First Name (Aditya), Last Name (Narayan), Education (ME), Experience (empty), Technology of Training (Java), Fees per Student (₹5,000.0), and Country (empty). The 'Fees per Student' field is highlighted with a yellow background. There is no error message displayed.



PROJECT WORK: STORY 21

Client wants better look and feel for pages of objects created in business process.

This can be achieved using “Page Layouts” in Salesforce.

(1).Every objects records should be shown in 2 columns.

Create two columns by clicking wrench icon in ‘Information’ section.

Student Master:

Student Master
SDC-26

Information

Student Code SDC-26	Owner Shekhar
First Name Rajat	Company Intelogik
Last Name Gandhi	Background Engineering
Phone	Placement Scope Rating
Email rajagandhi@gmail.com	Background Check Status
City Pune	Current Salary
Country India	MIN Card Number
Street Nanded City	Java Ref ID
State Maharashtra	Count of Placement Details 0

Course Master
CC-9

Related Details

Information

Course Code CC-9	Owner Shekhar
Course Name Hadoop	Category Others
Duration in Hours 60	Course Fees \$25,000
Created By Shekhar, 6/25/2021, 8:10 AM	Last Modified By Shekhar, 6/25/2021, 8:10 AM

Trainer Master:

Trainer Master
TM-13

Related Details

Information

Name TM-13	Owner Shekhar
First Name Addi	Fees per Student ₹12,500.00
Last Name Sharma	Linked In Profile
Education BE	Trainer Category Silver
Experience 8.0	Background Check Done(Yes/No)
Technology of training Dot net	Verification Status
Created By Shekhar, 6/29/2021, 11:12 AM	Last Modified By Shekhar, 6/29/2021, 1:58 PM

Placement Detail
PC-1

Related Details

Information

Placement Code PC-1	Promotional Field
Student SDC-20	Salary Achieved
Technology CC-2	Country of Placement UK
Company Name Oracle	Last Modified By Shekhar, 6/29/2021, 12:10 PM



Training Deal:

The screenshot shows a 'Training Deal' record with the code 'Deal Code-15'. The 'Information' section contains fields like Deal Code, Fees proposed etc in the Discussion, Discount Percentage, Discount Reason, Personal Issue, Fees Finalized for student, Fees Paid by student, and Fees Pending to Student. The 'Course' section contains fields like Course, Student, Trainer appointed, Email of Student, Email of Trainer, Training Start Date, and Training Completion Date.

(2).Clone button need not be available.

Remove Clone button from all object's page layout as follows:

The screenshot shows the Page Layout editor for the 'Student Master Detail' object. In the 'Buttons' section, the 'Clone' button is highlighted with a green box and a yellow arrow points to it. Other buttons shown include Change Owner, Edit, Get Alerts, Change Record Type, Printable View, Delete, and Sharing.

(3).Between every field they need space.

Adding Space between all fields of all 5 objects using “Blank Value” in page layout as no specific object is defined in requirement.



INTELOGIK-INTERNSHIP PROGRAM

Student Master:

Student Master
SDC-26

Information

Student Code
SDC-26

First Name
Kunal

Last Name
Gandhi

Phone

Email
kunalgandhi@gmail.com

Course Master:

Course Master
CC-9

Related **Details**

Information

Course Code
CC-9

Course Name
Hadoop

Duration in Hours
60

Created By
 Shekhar, 6/25/2021, 8:10 AM

Training Deal:

Training Deal
Deal Code-15

Information

Deal Code
Deal Code-15

Fees proposed at Initial Discussion
₹15,000.00

Discount Percentage
3.00%

Discount Reason
Personal Issue

Fees Finalised for student
₹14,550.0

Placement Detail:

Placement Detail
PC-1

Related **Details**

Information

Placement Code
PC-1

Student
[SDC-20](#)

Technology
[CC-2](#)

Company Name
Oracle



Trainer Master:

Trainer Master
TM-13

Related	Details
Information	
Name	TM-13
First Name	Aditi
Last Name	Sharma
Education	BE
Experience	8.0
Technology of Training	Dot net

(4).Client wants two Sections in “Trainer Master “page.

(Requirement Blocker: Fields to be added into Section are not given)

(1) Trainer’s Personal Details

Trainer’s Personal Details Section

First Name Aditi	Country
Last Name Sharma	



INTELOGIK-INTERNSHIP PROGRAM

(ii) Trainer's Professional Details

Trainer's Professional Details Section	
Education BE	Background Check Done(Yes/No) <input type="checkbox"/>
Experience 8.0	Verification Status
Technology of Training Dot net	Fees per Student ₹12,500.0
Trainer Category Silver	Linked In Profile
Created By Shekhar, 6/29/2021, 11:12 AM	Last Modified By Shekhar, 6/29/2021, 1:58 PM

(5).Client wants three Sections in “Student Master “page.

(Requirement Blocker: Fields to be added into Section are not given)

(i) Student's Personal Details

Student's Personal Details Section	
First Name Kunal	City Pune
Last Name Gandhi	Country India
Phone	Street Nanded City
Email kunalgandhi@gmail.com	State Maharashtra
PAN Card Number	



INTELOGIK-INTERNSHIP PROGRAM

(ii) Student's Professional Details

▼ Student's Professional Details Section

Company Accenture	Background Engineering
Placement Scope Rating	Background Check Status
Current Salary	Count of Placement Details 0
Search Student's Location	
Created By Shekhar, 6/30/2021, 4:20 AM	Last Modified By Shekhar, 6/30/2021, 4:20 AM

(iii) Student's Training Details

▼ Student's Training Details Section

Java Ref ID



PROJECT WORK: STORY 22

Client wants quick way to make better processing of candidate.

The processing includes Searching Student's Location based on fields provided by Students i.e. Street, City, State and arranging Proper trainer accordingly.

This can be achieved by creating “Custom Links” on Record Page of ‘Student Master’ object, which will open Map automatically with Location based on Students provided field.

(1).Create Custom Link on Student Master object.

Link Name	Search Student's Location
Display Type	Detail Page Link
Behaviour	Display in New Window
Content Source	URL
URL Added	http://maps.google.com/ maps?f=q&hl=en& q={ !Student_Master__c.Street__c } +{ !Student_Master__c.City__c } +{ !Student_Master__c.State__c }&om=1
Error Message	Sorry!!! You are not Authorised person to change Fees per Student.

Custom Button or Link Detail		<input type="button" value="Edit"/>	<input type="button" value="Window Open Properties"/>	<input type="button" value="Delete"/>	<input type="button" value="Where is this used?"/>
Label	Search Student's Location	Object Name	Student Master		
Name	Search_Student_s_Location	Link Encoding	Unicode (UTF-8)		
Behavior	Display in new window	Display Type	Detail Page Link		
Button or Link URL	http://maps.google.com/maps?f=q&hl=en&q={ !Student_Master__c.Street__c }+{ !Student_Master__c.City__c }+{ !Student_Master__c.State__c }&om=1				
Height (in pixels)	600	Show Address Bar	<input type="checkbox"/>		
Width (in pixels)		Show Scrollbars	<input checked="" type="checkbox"/>		
Window Position	No Preference	Show Toolbars	<input type="checkbox"/>		
Resizable	<input checked="" type="checkbox"/>	Show Menu Bar	<input type="checkbox"/>		
Description	This custom link is used to Search Student's Location based on information provide by student in Student master object.				
Created By	Shekhar, 6/30/2021, 4:16 AM				
Modified By	Shekhar, 6/30/2021, 4:20 AM				



INTELOGIK-INTERNSHIP PROGRAM

(2).Add Custom Link in ‘Student Master’ object Page layout.

The screenshot shows the Salesforce Page Layout Editor interface. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a sidebar titled 'Fields' lists options like Buttons, Custom Links, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, and Related Lists. In the main area, there's a 'Quick Find' bar with a search field for 'Field Name'. Below it is a table with columns for Section, Field Name, and Description. The table includes rows for 'Section' (Section), 'Blank Space' (Blank Space), 'Background' (Background), and 'Background Check ...' (Background Check ...). A section labeled 'Background Check Status' contains fields for Sample Text, Java Ref ID, and Count of Placement Details (32,667). Another section labeled 'System Information (Header visible on edit only)' shows Created By (Sample Text) and Last Modified By (Sample Text). A yellow box highlights the 'Custom Links' section, which contains a link labeled 'Search Student's Location'.

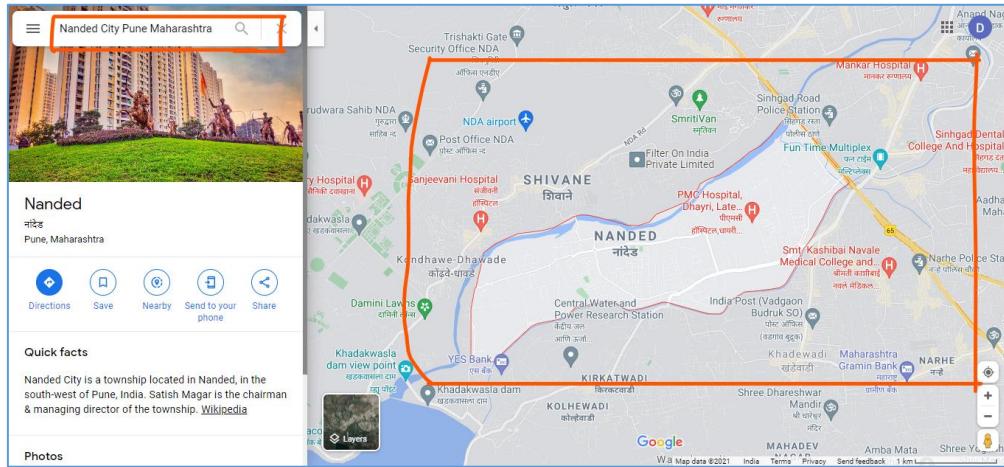
(3).Training deal records will have this link on Record details page.

The screenshot shows the Student Master record detail page for SDC-26. At the top, there's a header with a student icon and the text 'Student Master SDC-26'. To the right, there's a link to 'Training Deals [0]'. Below the header, the record detail section is titled 'Student Master Detail'. It shows fields for Student Code (SDC-26), First Name (Kunal), Last Name (Gandhi), Phone, Email (kunalgandhi@gmail.com), City (Pune), Country (India), Street (Nanded City), State (Maharashtra), and a 'Custom Links' section with a link labeled 'Search Student's Location'. At the bottom, it shows 'Created By' (Shekhar) and the creation date (6/30/2021, 4:20 AM). There are also 'Edit', 'Delete', 'Clone', and 'Sharing' buttons at the bottom right.



INTELOGIK-INTERNSHIP PROGRAM

(4) Clicking on "[Search Student's Location](#)" link, you will be redirected on Google Map page to show Student's location.





PROJECT WORK: STORY 23

Client wants quick way to make better processing of candidate.

The processing includes Sending Email to Student on Email-Id provided by Student and keep updating them on Training Steps by manual Email.

This can be achieved by creating “Custom Button” on Record Page of “Training Deal “object, which will open Gmail automatically with Email of concern person auto populated.

(1).Create Custom Button on Training Deal object.

Button Name	Send Email To Student
Display Type	Detail Page Button
Behaviour	Display in New Window
Content Source	URL
URL Added	<code>https://mail.google.com/mail?view=cm&tf=0&to={!Training_Deal__c.Email_of_Student__c}&tf=1</code>

Send Email To Student

Custom Button or Link Edit

Label: Send Email To Student
Name: Send_Email_To_Student
Description: This custom button will redirect you to Gmail site with Student's Email
Display Type: Detail Page Button [View example](#)
 Detail Page Link View example
 List Button [View example](#)
Behavior: Display in new window [View Behavior Options](#)
Content Source: URL
Select Field Type: Training Deal
Insert Field: -- Insert Merge Field -- [Insert Operator](#)
This custom button will redirect you to Gmail site with Student's Email (Text) = `https://mail.google.com/mail?view=cm&tf=0&to={!Training_Deal__c.Email_of_Student__c}&tf=1`



INTELOGIK-INTERNSHIP PROGRAM

(2).Add Custom Button in Training Deal object Page layout.

The screenshot shows the Salesforce Page Layout Editor interface. At the top, there are standard buttons like Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below this is a 'Fields' sidebar with options like Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. A 'Quick Find' search bar is also present. The main area displays the 'Training Deal Detail' layout. It includes a header with 'Standard Buttons' (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Get Alerts) and a 'Custom Buttons' section where the 'Send Email To Student' button is located. Below the header, there's information about the deal (Deal Code: GEN-2004-001234, Fees proposed at Initial Discussion: ₹123.45) and two radio buttons for Course and Student. The 'Send Email To Student' button is highlighted with a yellow box.

(3).Training deal records will have this button on Right hand side.

The screenshot shows the Salesforce Home page. On the left, there's a sidebar with 'Related' and 'Details' tabs. Under 'Details', various deal fields are listed: Deal Code (Deal Code-15), Course (CC-2), Fee proposed at Initial Discussion (₹15,000.00), Student (SDC-20), Trainer appointed (TMT-1), Discount Percentage (3.00%), Personal Issue (Email of Student: dhanashrimg@gmail.com), Email of Trainer, Fees Finalised for student (₹14,550.00), Fees Paid by student, Fees Pending by Student (₹14,550.00), and Deal Risk Status. On the right, there's a 'New Case' button in a dropdown menu, which is highlighted with a yellow box. Other options in the dropdown include New Lead, Delete, Clone, and Printable View. Below the dropdown, there are buttons for New Task, Log a Call, Set up an event..., and a 'Filters' section. A watermark 'Dhanashri' is visible across the page.

(4)Clicking on “Send Email to Student” button, you will be redirected on Gmail page with Student’s Email automatically.

The screenshot shows a 'New Message' window in Gmail. The recipient field contains 'dhanashrimg@gmail.com'. The message body is empty, and the toolbar at the bottom includes options for font, size, bold, italic, underline, etc. A watermark 'Dhanashri' is visible across the page.



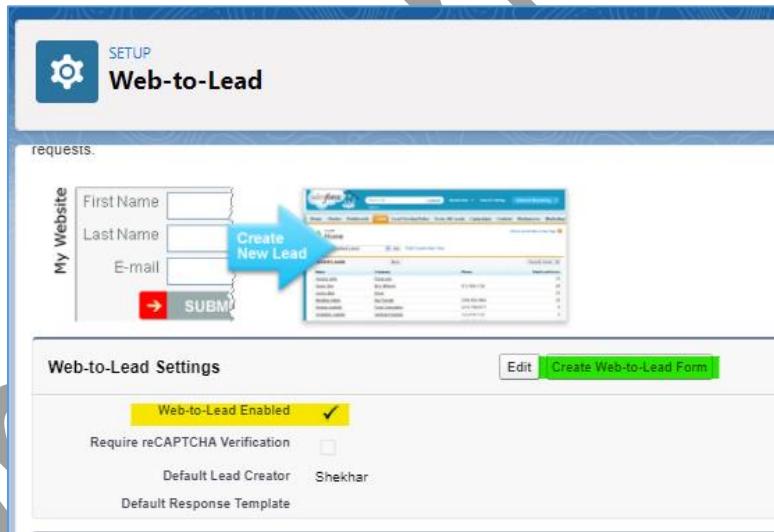
PROJECT WORK: STORY 24

Client wants all entries coming from PHP website should be redirected to Salesforce.

Client wants no Integration to be done due to Budget and time constraint.

This can be achieved without coding and integration using Standard functionality called "WEB TO LEAD".

(1) We need to create Web-To-Lead form by going to Setup → Marketing (Web-To-Lead).





INTELOGIK-INTERNSHIP PROGRAM

(2) Create one Web to Lead Form and add fields in form as per need like First name, Last name, Phone etc.

Click on “Generate” button so that it will generate Code.

SETUP
Web-to-Lead

Web-to-Lead Setup

Easily set up a page on your website to capture new leads.

Create a Web-to-Lead Form

Select the fields to include on your Web-to-lead form:

Available Fields	Selected Fields
Salutation	First Name
Title	Last Name
Mobile	Email
Fax	Company
Street	City
Zip	State/Province
Country	Website
Description	Phone
Lead Source	

NOTE: Would you like to add custom fields that you do not see?

After users submit the Web-to-Lead form, they will be taken to the specified return URL on your website, such as a "thank you" page.

http://www.intelogik.com

Include reCAPTCHA in HTML [\[?\]](#)

Generate **Cancel**

Web-to-Lead Setup

Easily set up a page on your website to capture new leads.

Create a Web-to-Lead Form

Copy and paste the sample HTML below and send it to your webmaster:

```
<!-- Please add the following code to your page header. -->
<!-- If necessary, please modify the charset parameter to specify the -->
<!-- character set of your HTML page. -->
<!-- -->

<META HTTP-EQUIV="Content-Type" CONTENT="text/html; charset=UTF-8">
<!-- -->
<!-- NOTE: Please add the following cFORM element to your page -->
<!-- -->

<form action="https://websalesforce.com/services/rule.WebToLead?encoding=UTF-8" method="POST">
<input type="hidden" name="id" value="00Dg0000000XJWf">
<input type="hidden" name="retURL" value="http://www.Intelogik.com">
<!-- -->
```

Finished



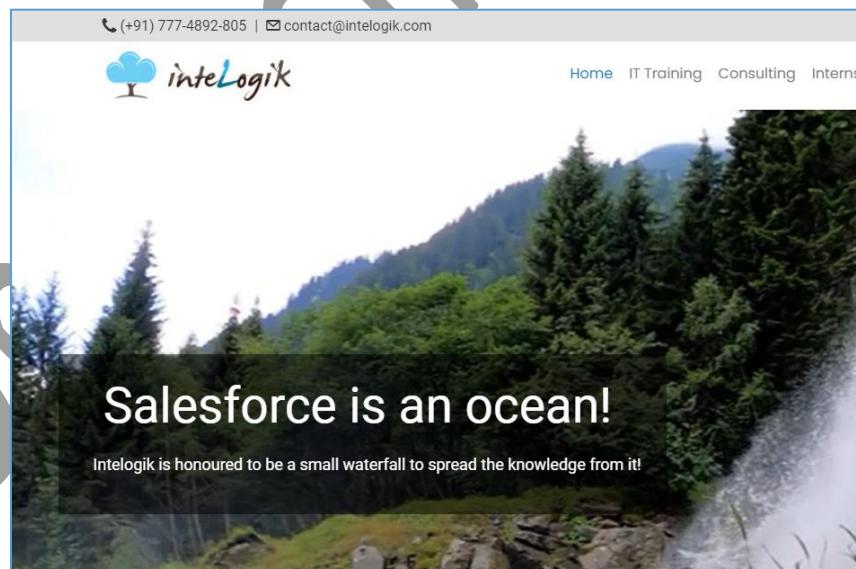
INTELOGIK-INTERNSHIP PROGRAM

(3)Copy Generated Code and paste it in Notepad and save as HTML type.

On clicking that created Web to Lead Form, It will navigate to Enquiry Form on browser where customer/Candidate will enter Detail.

First Name Adam
Last Name Joseph
Email adam@gmail.com
Company Accenture
City Jersey City
State/Province New Jersey
Phone 1234567890
Website adam.Joseph@accenture.co
Submit

(4)Once form is submitted, then automatically Page will be redirected to www.Intelogik.com site which is return URL provided and new Lead will be created in salesforce org from WEB Automatically.



	Name	Company	State/Prov...	Email	Lead Status	Created Date	O...	U...
1	Adam Joseph	Accenture	New Jers...	adam@gmail.com	Open - Not Contac...	7/21/2021, 12:24 ...	sg	<input checked="" type="checkbox"/>
2	Bertha Boxer	Farmers Coop. of...	FL	bertha@fcof.net	Working - Conta...	6/20/2021, 5:59 P...	sg	<input checked="" type="checkbox"/>
3	Betty Bair	American Bankin...	PA	bblair@abanking...	Working - Conta...	6/20/2021, 5:59 P...	sg	<input checked="" type="checkbox"/>
4	Brenda McClure	Cardinal Inc.	IL	brenda@cardinal...	Working - Conta...	6/20/2021, 5:59 P...	en	<input checked="" type="checkbox"/>



PROJECT WORK: STORY 25

Client wants depending on Service Type in Lead that lead should be assigned to appropriate employee.

Client wants whenever Lead is coming for Service Type = ‘Training’ then it should be assigned to ‘Shekhar’ and Email should be sent regarding same.

Client wants whenever Lead is coming for Service Type = ‘Placement’ then it should be assigned to ‘Peter’ and Email should be sent regarding same.

This can be achieved by using ‘LEAD ASSIGNMENT RULE’ in Salesforce.

Lead Assignment Rule Name	Lead Assignment as per Service type
Rule Entries	(1) <ul style="list-style-type: none">• Lead: Service Type EQUALS ‘Training’• Lead Assigned To : ‘Shekhar’• Email Template : New Lead is Assigned
	(2) <ul style="list-style-type: none">• Lead: Service Type EQUALS ‘Placement’• Lead Assigned To : ‘Peter’• Email Template : New Lead is Assigned



(1) Create Lead Assignment Rule.

Lead Assignment Rule
Lead Assignment as per Service type

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

Rule Detail		Edit		Help for this Page	
Rule Name	Lead Assignment as per Service type <th>Active</th> <td><input checked="" type="checkbox"/></td> <th colspan="2"></th>	Active	<input checked="" type="checkbox"/>		
Created By	Shekhar, 7/21/2021, 1:33 AM	Modified By	Shekhar, 7/21/2021, 1:36 AM		
Action	Order	Criteria	Assign To	Email	
Edit Del	1	Lead: Service Type EQUALS Training	Shekhar	<input checked="" type="checkbox"/>	
Edit Del	2	Lead: Service Type EQUALS Placement	Peter	<input checked="" type="checkbox"/>	

(2) Create rule Entry 1 which will meet condition i.e. lead: Service Type EQUALS 'Training' and Lead Assigned To: 'Shekhar'

SETUP
Lead Assignment Rules

Enter the rule entry Save | Cancel

Step 1: Set the order in which this rule entry will be processed

Sort Order 1

Step 2: Select the criteria for this rule entry

Run this rule if the criteria are met :

Field	Operator	Value	AND
Lead: Service Type	equals	Training	AND
--None--	--None--		

[Add Filter Logic](#)

Step 3: Select the user or queue to assign the Lead to

User Shekhar Email Template New Lead is Assigned

Do Not Reassign Owner



INTELOGIK-INTERNSHIP PROGRAM

(3) Create rule **Entry 2** which will meet condition i.e. lead: Service Type EQUALS ‘Placement’ and Lead Assigned To: ‘Peter’

SETUP **Lead Assignment Rules**

Lead Assignment as per Service type

Enter the rule entry

Step 1: Set the order in which this rule entry will be processed
Sort Order

Step 2: Select the criteria for this rule entry
Run this rule if the **criteria are met** :

Field	Operator	Value	Logic
Lead: Service Type	equals	Placement	AND
--None--	--None--		

Add Filter Logic...
Step 3: Select the user or queue to assign the Lead to

(4) When lead is created with Service Type: Training, it will automatically assigned to ‘Shekhar’ and Email will be sent regarding it.

John Matthew

John Matthew

Title
Company IBM
Phone (2)
Email john@gmail.com

Lead Owner **Shekhar**

Name John Matthew
Company IBM
Title
Lead Source
Industry
Annual Revenue
Service Type **Training**
Address London
Product Interest
Phone
Mobile
Fax
Email john@gmail.com
Website
Lead Status Open - Not Contacted
Rating
No. of Employees
Current Generator(s)



INTELOGIK-INTERNSHIP PROGRAM

New Lead is Assigned Inbox x

Shekhar via 13qnfckf9co.5g-5kjw6ao.ap24.bnc.salesforce.com to me ▾

Mr. Shekhar

The new lead is assigned to you.

Please do the needful.

Thanks
Intelogik Team

(5) When lead is created with Service Type: Placement, it will automatically assigned to 'Peter' and Email will be sent regarding it.

Ajay Narayan

+ Follow New Case ▾

Title

Company Wipro

Phone (2) ▾

Email ajay@gmail.com

Lead Owner Peter

Name Ajay Narayan

Company Wipro

Title

Lead Source

Industry

Annual Revenue

Service Type Placement

Address Pune

Product Interest

Phone

Mobile

Fax

Email ajay@gmail.com

Website

Lead Status Open - Not Contacted

Rating

No. of Employees

Current Generator(s)

New Lead is Assigned Inbox x

Shekhar dhanashri.gade0915@gmail.com via 3p28xsfg9ipt.5g-5kjw6ao to me ▾

Mr. Peter

The new lead is assigned to you.

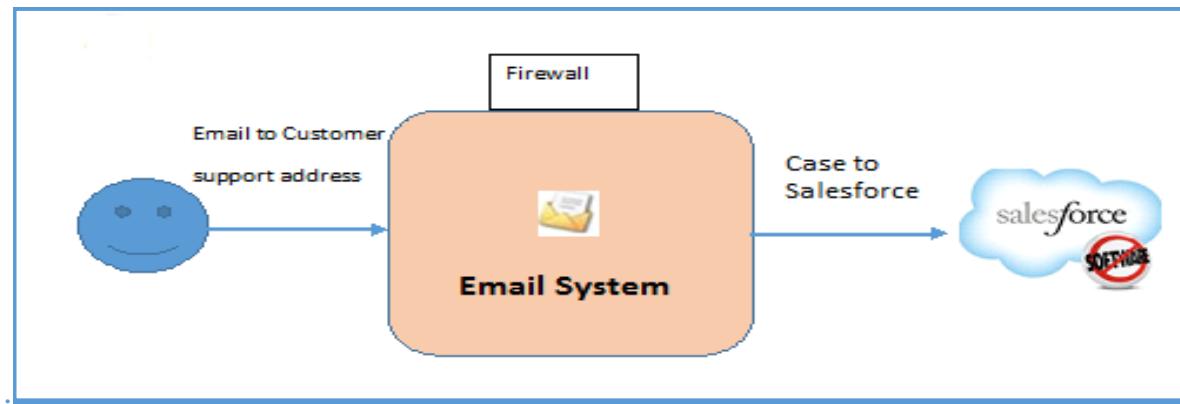
Please do the needful.

Thanks
Intelogik Team



PROJECT WORK: STORY 27

Client wants to create Issue/Case in Salesforce org when Email is send from Student regarding Service provided by Company.



This can be achieved using [Email to Case](#) Functionality.

(1) Go to Setup → Service → Email-To-Case.

Enable Email to Case option and Enable On-Demand Services.

The screenshot shows the 'Email-to-Case' configuration page under 'Setup'. It includes the following sections:

- Enable Email-to-Case:** Includes checkboxes for 'Notify Case Owners on New Emails', 'Enable HTML Email', 'Set Case Source to Email', and 'Save Email-to-Case attachments as Salesforce Files'. The first three are checked.
- Send Emails from Cases:** Includes checkboxes for 'Insert Thread ID in the Email Subject' and 'Insert Thread ID in the Email Body'. Both are checked.
- On-Demand Service:** A note explaining On-Demand Email-to-Case and a checkbox for 'Enable On-Demand Service' which is checked.

(2) Select Email2Case and Add Routing Addresses for it. Click on New.

- Routing Name: Intelogik Service (Email to Case) Routing Address
- Email Address: dhanashri.c.kulkarni@gmail.com



INTELOGIK-INTERNSHIP PROGRAM

In case Setting Select:

- Case User: Peter
- Case Origin: Email
- Case Priority: High

Once this setting is saved, Salesforce will ask to verify Email Id.

The screenshot shows the 'Email-to-Case' setup page in Salesforce. Under 'Routing Information', it lists the 'Source' as 'Email2Case'. A note indicates that Salesforce has created a service address: dhanashri.c.kulkarni@p-34gb1h5lef6z78tz0jbb44ioh1iu2txy8edkm7phzfdz6m5j5.5g-5kjw6eo.ap24.case.salesforce.com. The 'Email Services Address' field is highlighted in yellow. Other fields include 'Created By' (Shekhar) and 'Modified By' (Sh). Under 'Email Settings', there are options for 'Save Email Headers' and 'Accept Email From'. Under 'Task Settings', there are options for 'Create Task from Email' and 'Task Status' (Not Started). Under 'Case Settings', the 'Case Owner' is listed as Shekhar, 'Case Priority' as High, and 'Case Origin' as Email. At the bottom are 'Edit', 'Delete', and 'Clone' buttons.

(3) After Email verification is done, Salesforce will provide Modified long Email Id.

- Email Services Address: dhanashri.c.kulkarni@p-34gb1h5lef6z78tz0jbb44ioh1iu2txy8edkm7phzfdz6m5j5.5g-5kjw6eo.ap24.case.salesforce.com

(4) This Email Address should be given to Customer to send Email.

Whenever Email will be sent on this Service Email Address, Automatically case will be generated in Salesforce.

The screenshot shows a Salesforce Case record. The title is 'Case Hadoop FastTrack Learning Course'. The case details are: Priority: High, Status: New, and Case Number: 00001026. At the top right are buttons for '+ Follow', 'Edit', 'Delete', and 'Change Owner'. There is also a dropdown menu icon.



INTELOGIK-INTERNSHIP PROGRAM

Feed Related

Poll Post Email

What would you like to ask?

Most Recent Activity ▾

All Updates Emails Call Logs Text Posts Status Changes

D k To: dhanashri.c.kulkarni 3m ago

Hi Team,
I would like to know about Hadoop learning Hours.
I feel this course duration is very much.
Please let me know if you have any fast track Course for Same.

3m ago

Please let me know if you have any fast track Course for Same.
Thanks,
Priya

Reply Reply All Forward Comment

Shekhar Case created 3m ago

Details

Case Owner	Status
Shekhar	New
Case Number	Priority
00001026	High
Contact Name	Contact Phone
Account Name	Contact Email
Type	Case Origin
Case Reason	Email
Web Email	Web Company
dhanashrikulkarni0915@...	Web Phone
Web Name	Date/Time Closed
D k	7/21/2021, 8:03 AM
Created By	Created By
Shekhar	Last Modified By
AM	Shekhar , 7/21/2021, 8:03 AM
Subject	Subject
Hadoop FastTrack Learning Course	
Description	
Hi Team, I would like to know about Hadoop learning Hours. I feel this course duration is very much. Please let me know if you have any fast track Course for Same.	
Thanks, Priya	
Internal Comment	
Up-sell / Cross-sell Opportunity	

Dhanashri

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PROJECT WORK: STORY 28

Client wants whenever Cases are created Manually, Email should be sent to CEO and whenever service type = Placement, Case Owner should be ‘Peter’.

Both Shekhar and Peter should get email.

This can be achieved by using ‘Case Assignment Rule’ Salesforce.

Case Assignment Rule Name	Intelogik Case Assignment Rule
Rule Entries	(1) <ul style="list-style-type: none">• Case: Service Type EQUALS Placement• Case Assigned To : ‘Peter’• Email Template : (Support: Case Assignment Notification)
	(2) <ul style="list-style-type: none">• Case: Case Origin <> Email• Case Assigned To : ‘Shekhar’• Email Template : (Support: Case Created (Phone Inquiries))

(1) Create Case Assignment Rule.

Case Assignment Rule
Intelogik Case Assignment Rule

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		Edit	
Rule Name	Intelogik Case Assignment Rule	Active	<input checked="" type="checkbox"/>
Created By	Shekhar	Modified By	Shekhar, 7/22/2021, 9:17 AM
Edit			
Rule Entries			
Action	Order	Criteria	Assign To
Edit Del	1	Case: Service Type EQUALS Placement	Peter
Edit Del	2	Case: Case Origin NOTEQUALTO Email	Shekhar



(2) Create rule **Entry 1** which will meet condition i.e. Case: Service Type EQUALS ‘Placement’ and Case Assigned To: ‘Peter’.

SETUP Case Assignment Rules

Rule Entry Edit
Intelogik Case Assignment Rule

Enter the rule entry Save Save & New Cancel

Step 1: Set the order in which this rule entry will be processed
Sort Order

Step 2: Select the criteria for this rule entry
Run this rule if the :

Field	Operator	Value	Logic
Case: Service Type	equals	Placement	AND
--None--	--None--		AND

Add Filter Logic...

Step 3: Select the user or queue to assign the case to
 Peter Email Template Support: Case Assignment

Do Not Reassign Owner

(3) Create rule **Entry 2** which will meet condition i.e. Case: Case Origin is NOT Email then Assign Case to Shekhar and Send Email regarding Case Creation.

Step 1: Set the order in which this rule entry will be processed
Sort Order

Step 2: Select the criteria for this rule entry
Run this rule if the :

Field	Operator	Value	Logic
Case: Case Origin	not equal to	Email	AND
--None--	--None--		AND

Add Filter Logic...

Step 3: Select the user or queue to assign the case to
 Shekhar Email Template Support: Case Created (Pho)

Do Not Reassign Owner



INTELOGIK-INTERNSHIP PROGRAM

(4)When Case is created with Service Type: Placement, Case will automatically assigned to ‘Peter’ and Email will be sent regarding it.

(5)When Case is created Manually, Email will be sent to ‘CEO =Shekhar’ regarding it.

Dhanashri Gade



PROJECT WORK: STORY 29

Client wants to as soon as case is created, it should be resolved by Case Owner within 3 Hours otherwise it should be transferred to senior person who has access to Case object.

Shekhar has access to Case object and is senior so Auto Case Reassign User is Shekhar.

This can be achieved using Case-Escalation Rule.

Sr No.		
1.	<u>Case Escalation Name</u>	Intelogik Case Escalation Rule
2.	<u>Rule Entries</u>	<p>(1)Rule Entry :</p> <ul style="list-style-type: none">• Set order : 1• Specify Criteria for Rule entry :• Specify Business Hours: Intelogik Business Hours.• Specify how escalation times are set: When Case is created. <p>(2)Escalation Actions :</p> <ul style="list-style-type: none">• Specify the time criteria for this rule : 3 hours• Auto-reassign cases :USER (Shekhar)



(1) Create Case Auto Escalation Rule and add rule Entries.

SETUP Escalation Rules

Intelogik Case Escalation Rule

Enter the rule entry **Save** **Cancel**

Step 1: Set the order in which this rule entry will be processed
Sort Order: 1

Step 2: Select the criteria for this rule entry
Run this rule if the **criteria are met**:

Field	Operator	Value	AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Step 3: Specify the business hours criteria for this escalation rule
 Ignore business hours
 Use business hours specified on the case
 Set business hours: **Intelogik Business Hours**

Step 4: Specify how escalation times are set
 When case is created
 When the case is created, and disable after case is first modified
 Based on last modification time

(2) Create new Escalation Actions.

Escalation Action Edit

Escalation Action Edit
Specify the time criteria for this rule
Age Over: 3 minutes

Choose one or more of the following actions:

Auto-reassign cases
User: Shekhar

Notify users
Notify This User:
Notify Case Owner:

Notification Template: Support Escalated Case

You can enter up to five (5) email addresses to be notified. Please put each address on its own line.
Additional Emails:

Save **Cancel**



INTELOGIK-INTERNSHIP PROGRAM

(3) When case is created, automatically after 3 hours, ownership of that case will be given to Senior (Shekhar) if Case is not resolved by Case Owner.

We can monitor action using Setup → Environments → Monitoring → Case Escalation option.

Case Escalations

When salesforce.com triggers an escalation rule, its time-dependent actions are placed in the case escalation queue. Use the criteria below to monitor this queue.

Escalation Rule	operator	value	operator	value	operator	value
--None--	equals	--None--	AND	--None--	equals	--None--
--None--	equals	--None--	AND	--None--	equals	--None--
--None--	equals	--None--	AND	--None--	equals	--None--

Escalate At	Case To Escalate	Escalation Rule	Rule Entry	Escalation Action	Ignore Business Hours	Added Date
7/22/2021, 12:30 AM	00001027	Intelogik Case Escalation Rule	1	3 Hours and 0 Minutes	<input type="checkbox"/>	7/21/2021, 9:09 AM
7/22/2021, 12:30 AM	00001028	Intelogik Case Escalation Rule	1	3 Hours and 0 Minutes	<input type="checkbox"/>	7/21/2021, 9:24 AM

(4) This case is escalated after 3 hours when Case Owner: Peter did not Resolved it.

Cases **Recently Viewed**

4 items • Updated a minute ago

<input type="checkbox"/> Case Number	Subject	Status	Date/Time Opened	Case Owner Alias
1 00001028	Enquiry about Java Course	New	7/21/2021, 9:24 AM	sg
2 00001027	Enquiry about SFDC Course	New	7/21/2021, 9:09 AM	sg
3 00001026	Hadoop FastTrack Learning Course	New	7/21/2021, 8:03 AM	sg
4 00001002	Seeking guidance on electrical wiring installation for GC5060	New	6/20/2021, 5:59 PM	sg



PROJECT WORK: STORY 30

Client wants to use Intelogik Logo in salesforce for branding purpose. Training Deal object should have Intelogik Logo.

(1) To add logo to Intelogik app, Go to App Launcher → Intelogik Lightning → Edit → Select Logo from local resource → Upload.

The screenshot shows the 'Lightning App Builder' interface with the 'App Settings' tab selected. Under 'App Details & Branding', there are sections for 'App Details' and 'App Branding'. In the 'App Details' section, fields include 'App Name' (Intelogik Lightning), 'Developer Name' (Intelogik_Lightning), and 'Description' (Intelogik wants to run business on Salesforce Platform and provide two). In the 'App Branding' section, there is a 'Image' field containing the Intelogik logo, which is highlighted with a red box. Next to it is a 'Primary Color Hex Value' field set to #0070D2. Below these are 'Org Theme Options' and 'App Launcher Preview' sections.

(2) To add logo to Training Deal object, Go To → Setup → Tabs → Training Deal → Edit → Tab Style: Create Own Style → Choose Intelogik Logo → Save.

We need add image into 'Document' standard object so that it will be available in SFDC.

The screenshot shows a 'Define a new color style' dialog box. It has fields for 'Color' (with a color swatch) and 'Icon' (with a placeholder 'Insert an Image'). At the bottom are 'OK' and 'Cancel' buttons.



INTELOGIK-INTERNSHIP PROGRAM

The screenshot shows a Salesforce-like interface for the Intelogik Lightning program. At the top, there's a navigation bar with links for Home, Student Masters, Course Masters, Trainer Masters, Placement Details, Training Deals, Chatter, and Proposals. The 'Training Deals' link is highlighted with a yellow box. Below the navigation is a header bar with a 'Training Deal' icon and the text 'Deal Code-21'. A secondary yellow box highlights this deal code. The main content area has tabs for 'Related' and 'Details', with 'Details' being the active tab. Under the 'Information' section, it shows 'Deal Code: Deal Code-21', 'Course: CC-10', 'Fees proposed at Initial Discussion: ₹30,000.00', and 'Student: SDC-25'.

Dhanashri Gadde



PROJECT WORK: STORY 31

Client gets Student's data from ABCD.Com Company on regular basis in .CSV file format. Client is getting data from Java Platform.

Client wants to load data in Student Master Object on regular basis,

If any record is present, then it should be overwritten and if record is not present then create new record.

This can be achieved by creating one External Ref Id in Student Master Object.

While loading data using Data Loader, this External Ref ID can be used to refer records from Java Platform to Salesforce.

UPsert command needs to be used to create new Records as well as Update Existing Records.

(1) Create Field in Student Master Object: Java Ref ID

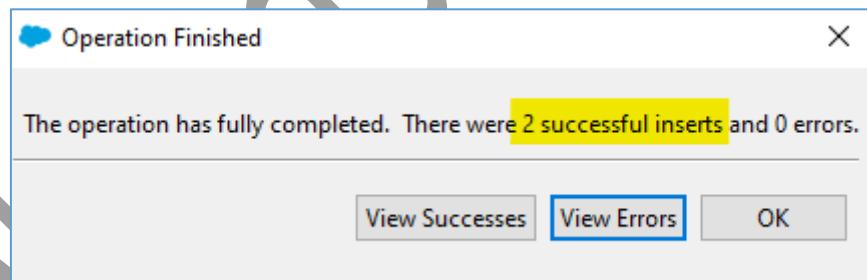
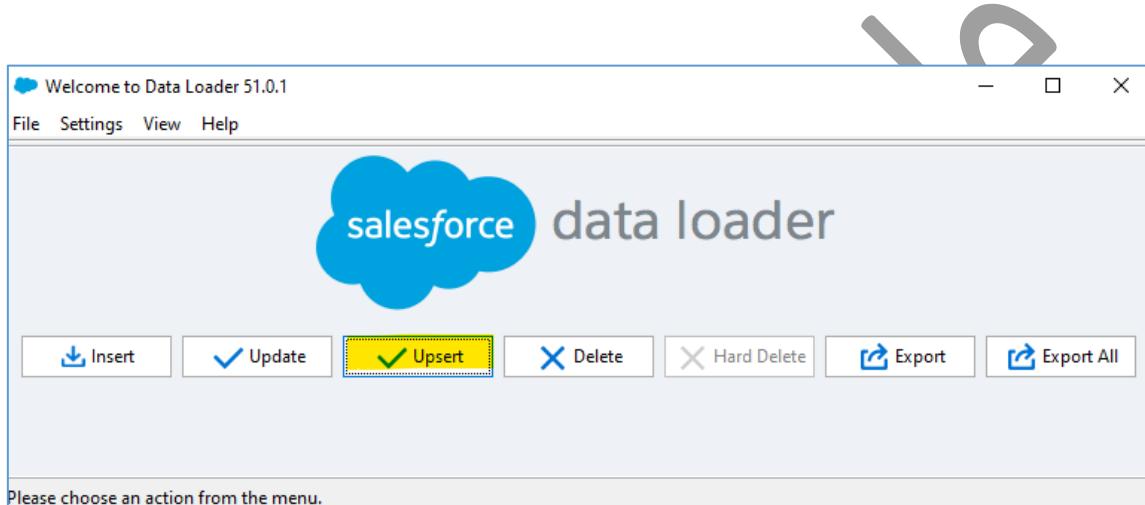
Custom Field Definition Detail	
Edit Set Field-Level Security View Field Accessibility Where is this used?	
Field Information	
Field Label	Java Ref ID
Field Name	Java_Ref_ID
API Name	Java_Ref_ID_c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	<u>Shekhar</u> , 6/28/2021, 8:10 AM
Modified By	<u>Shekhar</u> , 7/22/2021, 5:01 AM
General Options	
Required	<input type="checkbox"/>
Unique	<input checked="" type="checkbox"/>
Case Sensitive	<input checked="" type="checkbox"/>
External ID	<input checked="" type="checkbox"/>
Encrypted	<input type="checkbox"/>
Default Value	



(2) Load (File 1 Jan) data in 'Student Master' using Data Loader given by ABCD.Com company.

As Validation Rule is applied to Student Master Object, for time being we need to disable it.

UPSERT Command should be chosen to Insert and Update Records.

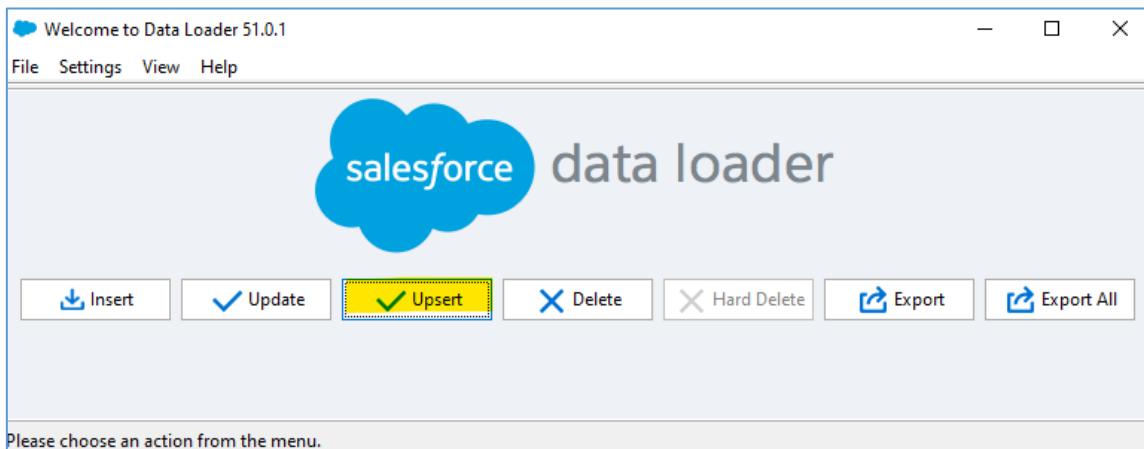


Successfully entered 2 records in Salesforce.



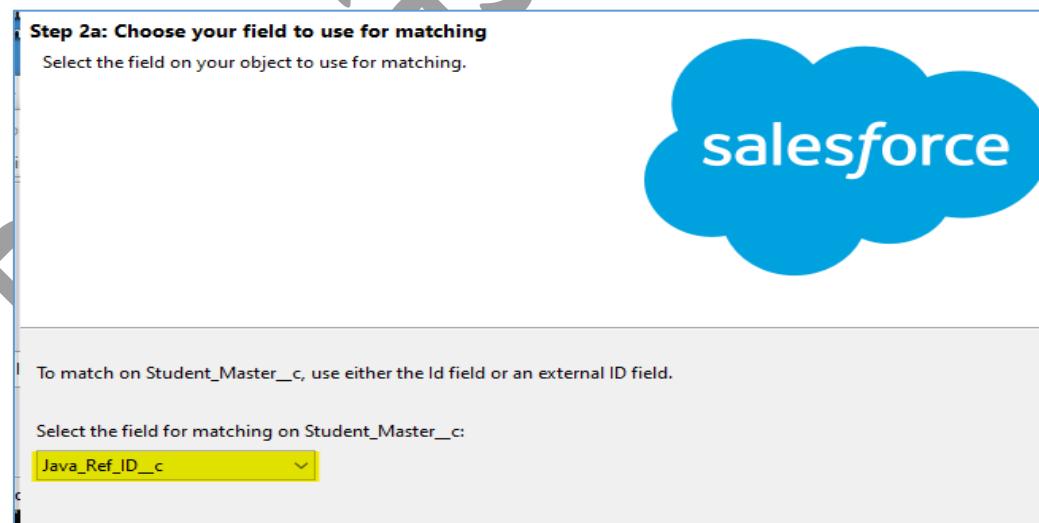
(3) Load (File 2 Feb) data in 'Student Master' using Data Loader given by ABCD.Com company.

This time UPSERT Command should be chosen to Insert and Update Records.



This time Data Loader will ask for Either Id or External Id to match to Object.

As Data is coming from different platform Java, We need to mention External Id.





INTELOGIK-INTERNSHIP PROGRAM

(4).Data will inserted and updated in Student Master Object with Java Ref Id.

Student Master
SDC-28

▼ Student's Personal Details Section

First Name Harrison	Country
Last Name Philip	Street
Phone (901) 234-5677	State
Email	City

▼ Student's Training Details Section

Java Ref ID 3343332323

Dhanasi



PROJECT WORK: STORY 32

Client wants all workflow rules should be converted into Process Builder.

This can be achieved by adding Criteria and Actions in Process Builder which are written for Workflows Rules.

I have done most of Automations in Process Builder earlier.

Only one Workflow needs to be converted to Process Builder.

Work Flow Name	Work Flow Rule for Email sending to Trainer And Student when new Training Deal is created
Work Flow Actions	<ul style="list-style-type: none">• Task• Email Alert• Scheduled Email Alert

Workflow Rule
WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created

Workflow Rule Detail

Role Name	WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created	Object	Training Deal
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created
Description	WorkFlow Rule for Email sending to Trainer And Student when new Training Deal is created	Modified By	Shakir 6/29/2021, 11:34 AM
Rule Criteria	Training Deal: Deal_Code not exists in ISBLANK		
Created By	Shakir 6/29/2021, 11:34 AM		

Workflow Actions

Immediate Workflow Actions

Type	Description
Task	Data feedback from Student about Training.
Email Alert	Email to be Sent to Student regarding Training Plan.
Email Alert	Email to be Sent to Trainer as new Training Plan should be send.

Time-Dependent Workflow Actions [See an example](#)

Type	Description
1 Day After Rule Trigger Date	Email Alert
	Email to be sent to Harry after one day of record creation.



INTELOGIK-INTERNSHIP PROGRAM

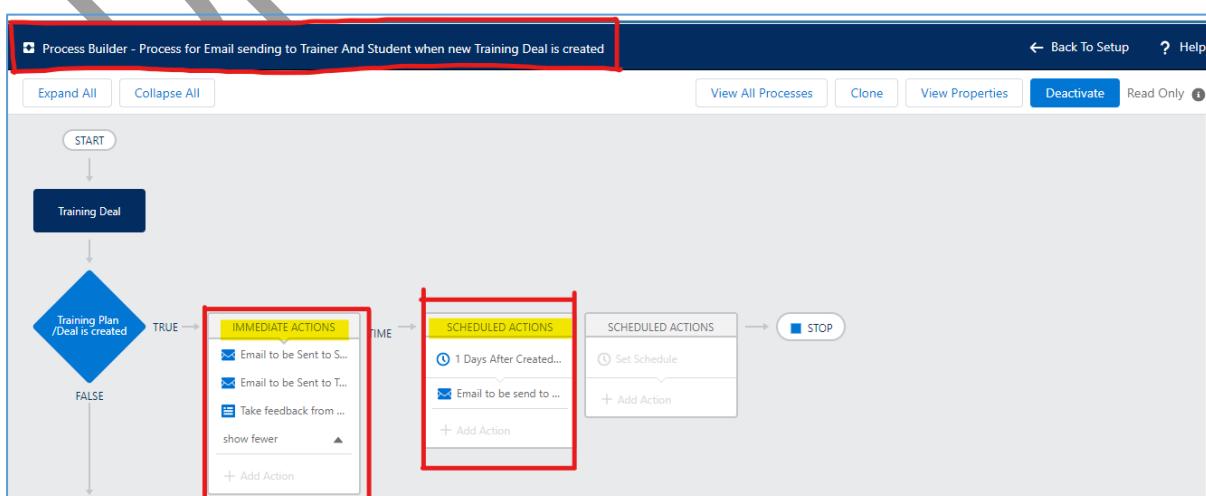
All these criteria and actions are added in Process Builder.

Process Name	Process for Email sending to Trainer And Student when new Training Deal is created
Object Name	Training Deal
Criteria Name	Training Plan /Deal is created
Specify When to Start the Process	Only when Record is created
Criteria	No criteria—just execute the actions!
Immediate Action	<ul style="list-style-type: none">• Email Alert: Email to be sent to Student regarding Training Plan.• Task: Take feedback from Student about Training.• Email Alert: Email to be sent to Trainer as new Training Plan should be send.
Scheduled Action	<ul style="list-style-type: none">• Scheduled Email alert: Email to be send to Harry after one day of record creation.

Task Creation:

While creating task,

Go to → Immediate Actions → Create a Record → Record Type = Task → Set field values → Save





PROJECT WORK: STORY 33

Client wants see all Student Records from Student Master Object on one single Visualforce page.

- Apex Class(Controller) Name : DisplayStudentRecords

```
DisplayStudentRecords.apxc
Code Coverage: None API Version: 52 Go
1 Public class DisplayStudentRecords{
2
3     public List<Student_Master__c> StudentRecords {get;set;}
4
5     Public DisplayStudentRecords(){
6
7         StudentRecords = [SELECT First_Name__c, Last_Name__c, Company__c, City__c, Phone__c FROM Student_Master__c LIMIT 100];
8
9     }
10
11 }
```

- Visualforce Page Name: DisplayStudentRecords VF Page

```
DisplayStudentRecords_VF_Page.vfp
Preview API Version: 52
1 <apex:page controller="DisplayStudentRecords" >
2     <apex:form >
3         <apex:pageBlock title="Student's Record" >
4             <apex:pageBlockTable value="{!!StudentRecords}" var="student" >
5                 <apex:column value="{!!student.First_Name__c}" />
6                 <apex:column value="{!!student.Last_Name__c}" />
7                 <apex:column value="{!!student.Company__c}" />
8                 <apex:column value="{!!student.City__c}" />
9                 <apex:column value="{!!student.Phone__c}" />
10            </apex:pageBlockTable>
11        </apex:pageBlock>
12    </apex:form>
13 </apex:page>
```



INTELOGIK-INTERNSHIP PROGRAM

- Clicking on Preview on Visualforce page, it will show page showing List of all Student's Records

Student's Record					
First Name	Last Name	Company	City	Phone	
Harry	Philip	IBM	NewYork	1111111	
Larry	Silva	Oracle	London	2222222	
Jerry	Octor	Microsoft	Toronto	3333333	
Matthew	Symond	Dell	Mumbai	4444444	
Robert	Kistern	HP	NewYork	5555555	
Peter	Smith	Nokia	London	6666666	
Philip	Williams	Samsung	Toronto	7777777	
Ket	Brown	Oracle	Mumbai	8888888	
Sam	Johnson	Microsoft	NewYork	9999999	
Tom	Garcia	HP	London	11111110	
Kunal	Gandhi	Accenture	Canberra		
Adam	Lee	Flipkart	Pune		
Adam	Lee	Oracle	Pune	(919) 191-9191	
Peter	Smith	Oracle		(922) 229-1910	
Harrison	Lu	Samsung	Mumbai	(922) 339-1910	
Andrew	Joseph	Dell	Toronto	(920) 009-1910	
Larry	Ken	HP	NewYork	(888) 009-1910	
Harrison	Philip			9012345677	
Patrick	Silva			9012345688	
Santa	Kelly				
Aman	Varma			+911234567890	

Dhanashri



PROJECT WORK: STORY 34

Client wants to see all Training Deal data as well as Trainer Master Data on Same VF page for better Understanding of Training Program.

This can be achieved using Wrapper class.

- Apex Class(Controller) Name : WrapperClassOfTrainingDeal

```
WrapperClassOfTrainingDeal.apxc  TrainingProgramRecordsDisplay_VFPage.vfp
Code Coverage: None | API Version: 52
1 public class WrapperClassOfTrainingDeal {
2     public List<WrapperClass> ListWrapper { get; set; }
3
4     public WrapperClassOfTrainingDeal(){
5
6         List<Training_Deal__c> listOfDealRecords = [Select Name,Course__c,Trainer_appointed__r.First_Name__c, Trainer_appointed__r.Last_Name__c,
7                                         Trainer_appointed__r.Education__c FROM Training_Deal__c LIMIT 1000];
8
9         if(listOfDealRecords.size() >0){
10
11             ListWrapper = new List<WrapperClass>();
12
13             for(Training_Deal__c VarT : listOfDealRecords){
14
15                 ListWrapper.add(new WrapperClass(VarT));
16
17             }
18         }
19     }
20
21     public class WrapperClass{
22
23         public Training_Deal__c VarTD { get; set; }
24
25         public WrapperClass(Training_Deal__c VarTD){
26
27             this.VarTD = VarTD;
28         }
29     }
30 }
```

- Visualforce Page Name: TrainingProgramRecordsDisplay_VFPage

```
WrapperClassOfTrainingDeal.apxc  TrainingProgramRecordsDisplay_VFPage.vfp
Preview | API Version: 52
1 <apex:page controller="WrapperClassOfTrainingDeal" >
2     <apex:form>
3
4         <apex:pageBlock id="pg">
5             <apex:pageBlockSection title="Training Program Records" >
6                 <apex:pageBlockTable value="{!ListWrapper}" var="d">
7
8                     <apex:column value="{!d.VarTD.Name}"></apex:column>
9                     <apex:column value="{!d.VarTD.Course__c}"></apex:column>
10                    <apex:column value="{!d.VarTD.Trainer_appointed__r.First_Name__c}"></apex:column>
11                    <apex:column value="{!d.VarTD.Trainer_appointed__r.Last_Name__c}"></apex:column>
12                    <apex:column value="{!d.VarTD.Trainer_appointed__r.Education__c}"></apex:column>
13
14                 </apex:pageBlockTable>
15             </apex:pageBlockSection>
16         </apex:pageBlock>
17
18     </apex:form>
19 </apex:page>
```



INTELOGIK-INTERNSHIP PROGRAM

- Clicking on Preview on Visualforce page, it will show page with Training Deals and Trainer's information on same page.

▼ Training Program Records				
Deal Code	Course	First Name	Last Name	Education
Deal Code-15	CC-2	Ajay	Reddy	BE
Deal Code-29	CC-9	Vinit	Aggrawal	MCA
Deal Code-14	CC-2	Ajay	Reddy	BE
Deal Code-16	CC-2	Ajay	Reddy	BE
Deal Code-21	CC-10	Aditya	Narayan	ME
Deal Code-19	CC-2	Ajay	Reddy	BE
Deal Code-20	CC-10	Ajay	Reddy	BE
Deal Code-18	CC-16	Aditi	Sharma	BE
Deal Code-26	CC-18	Aditya	Narayan	ME
Deal Code-27	CC-16			
Deal Code-17	CC-9	Aditi	Sharma	BE

Dhananjay

PROJECT WORK: STORY 35



INTELOGIK-INTERNSHIP PROGRAM

Client wants to see all Training deals depending in Course.

Client wants to input field called “Course to Search” and when client will enter Course name then, he should be able to see all records of Training Deal object depending on Course name.

- Apex Class(Controller) Name : SearchCourseController

The screenshot shows the Apex Class Editor for the class **SearchCourseController**. The code is as follows:

```
1 public class SearchCourseController {
2     public list <Training_Deal__c> VarTrainingDeal {get;set;}
3     public String searchKey {get;set;}
4
5     public void search(){
6         VarTrainingDeal= Database.query('Select id,
7                                         Course__c,
8                                         Course__r.Course_Name__c,
9                                         Training_Start_Date__c,
10                                        Training_Completion_Date__c,
11                                         Student__c, Trainer_appointed__c
12                                         FROM Training_Deal__c WHERE id != NULL AND Course__r.Course_Name__c = :searchKey');
13     }
14 }
15 }
```

A red rectangle highlights the SOQL query line starting with 'Select id,'.

- Visualforce Page Name: SearchCourse_VF_Page



INTELOGIK-INTERNSHIP PROGRAM

```
SearchCourse_VF_Page.vfp *
Preview API Version: 52
1 <apex:page Controller="SearchCourseController">
2   <apex:form >
3     <apex:pageBlock title="Search Result">
4       <apex:pageBlockSection Columns="1">
5         <apex:pageBlockSectionItem >
6           <apex:outputLabel value="Course to Search"/>
7           <apex:inputText value="{!searchKey}" />
8         </apex:pageBlockSectionItem>
9       </apex:pageBlockSection>
10      <apex:pageMessages id="ShowMeassage" escape="False"></apex:pageMessages>
11
12      <apex:pageBlockButtons>
13        <apex:commandButton value="Search" action="{!search}" onclick="ShowMeassage" style="margin: 5px;"/>
14      </apex:pageBlockButtons>
15
16      <apex:pageBlockTable value="{!!VarTrainingDeal}" var="deal">
17        <apex:column value="{!!deal.Course__r.Course_Name__c}"/>
18        <apex:column value="{!!deal.Training_Start_Date__c}"/>
19        <apex:column value="{!!deal.Training_Completion_Date__c}"/>
20        <apex:column value="{!!deal.Student__c}"/>
21        <apex:column value="{!!deal.Trainer_appointed__c}"/>
22      </apex:pageBlockTable>
23    </apex:pageBlock>
24  </apex:form>
25 </apex:page>
```

- Clicking on Preview on Visualforce page, it will show page with input field and ‘Search’ button.

Search Result				
Course to Search		Search		
Course Name	Training Start Date	Training Completion Date	Student	Trainer appointed
Dotnet	6/25/2021	7/25/2021	SDC-20	TMTC-1
Dotnet	6/30/2021	7/30/2021	SDC-20	TMTC-1
Dotnet	5/30/2021	6/29/2021	SDC-20	TMTC-1
Dotnet			SDC-20	TMTC-1

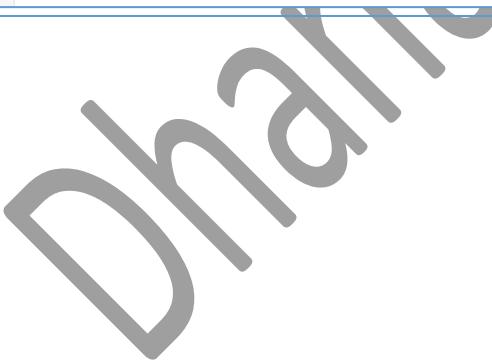


PROJECT WORK: STORY 36

Client wants to show error message if no record of Training Deal object is found depending on Course entered.

This can be achieved using Apex: Page Messages in Vf page and ApexPages.addmessage in Apex Class

- Apex Class(Controller) Name : SearchCourseController



```
SearchCourseController.apxc [ SearchCourse_VF_Page.vfp ]
Code Coverage: None | API Version: 52 | Go To
1 * public class SearchCourseController {
2     public list <Training_Deal__c> VarTrainingDeal {get;set;}
3     public String searchKey {get;set;}
4
5     public void search(){
6
7         VarTrainingDeal= Database.query('Select id,Course__c,Course__r.Course_Name__c,Training_Start_Date__c,Training_Completion_Date__c,Student__c From Training_Deal__c Where Course__r.Course_Name__c = :searchKey');
8
9         if(VarTrainingDeal.size() == 0){
10             ApexPages.addmessage(new ApexPages.message(ApexPages.severity.Error,'No Record found with this Course!!!!!!0 '));
11         }
12     }
13 }
14
15 }
```



INTELOGIK-INTERNSHIP PROGRAM

- Visualforce Page Name: SearchCourse_VF_Page

```
SearchCourseController.apxc SearchCourse_VF_Page.vfp
Preview API Version: 52

1 <apex:page Controller="SearchCourseController">
2   <apex:form>
3     <apex:pageBlock title="Search Result">
4       <apex:pageBlockSection Columns="1">
5         <apex:pageBlockSectionItem>
6           <apex:outputLabel value="Course to Search"/>
7           <apex:inputText value="{!!searchKey}" />
8         </apex:pageBlockSectionItem>
9       </apex:pageBlockSection>
10      <apex:pageMessages id="ShowMeassage" escape="False"></apex:pageMessages>
11      <apex:pageBlockButtons>
12        <apex:commandButton value="Search" action="{!!search}" onclick="ShowMeassage" style="margin: 5px;"/>
13      </apex:pageBlockButtons>
14
15      <apex:pageBlockTable value="{!!VarTrainingDeal}" var="deal">
16
17        <apex:column value="{!!deal.Course__r.Course_Name__c}"/>
18        <apex:column value="{!!deal.Training_Start_Date__c}"/>
19        <apex:column value="{!!deal.Training_Completion_Date__c}"/>
20        <apex:column value="{!!deal.Student__c}"/>
21        <apex:column value="{!!deal.Trainer_appointed__c}"/>
22      </apex:pageBlockTable>
23    </apex:pageBlock>
24  </apex:form>
25 </apex:page>
```

- Clicking on Preview on Visualforce page, it will show Error on page when Entered Course information is not present in Training Deal Record.

The screenshot shows a Visualforce page titled "Search Result". At the top, there is a search bar with the placeholder "Course to Search" and a "Search" button. Below the search bar, there is a text input field containing "Javascript". A yellow error message box is displayed, containing a red exclamation mark icon and the text "Error: No Record found with this Course!!!!!!!".



PROJECT WORK: STORY 37

Client wants to show List of all deals in Training Deal object's Standard page

This can be achieved using adding created VFpage in Page layout of Standard Page of Training Deal Object.

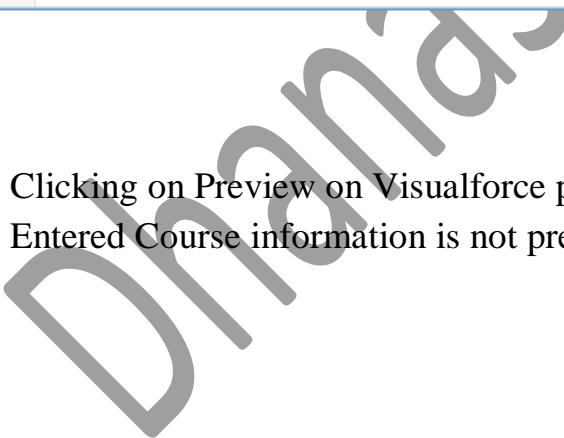
- Apex Class(Controller) Name : DisplayDealRecordController



```
DisplayDealRecords.vfp | DisplayDealRecordController.apxc
Code Coverage: None API Version: 52
1 public class DisplayDealRecordController {
2
3     public List<Training_Deal__c> records {get; set;}
4
5     public DisplayDealRecordController (){
6
7         records = [SELECT Name,Course__r.name,Student__r.Name,
8             Trainer_appointed__r.Name,Fees_Finalised_for_student__c FROM Training_Deal__c];
9
10    }
11}
```



- Visualforce Page Name: SearchCourse_VF_Page



```
DisplayDealRecords.vfp | DisplayDealRecordController.apxc | 
Preview API Version: 52
1 <apex:page controller="DisplayDealRecordController">
2   <apex:pageBlock title="Deal Details List">
3     <apex:pageBlockTable value="{!records}" var="record">
4       <apex:column>
5         <apex:facet name="header">Deal Code</apex:facet>
6         <apex:outputText value="{!record.Name}"/>
7       </apex:column>
8       <apex:column>
9         <apex:facet name="header">Course</apex:facet>
10        <apex:outputText value="{!record.Course__r.name}"/>
11      </apex:column>
12      <apex:column>
13        <apex:facet name="header">Student</apex:facet>
14        <apex:outputText value="{!record.Student__r.Name}"/>
15      </apex:column>
16      <apex:column>
17        <apex:facet name="header">Trainer appointed</apex:facet>
18        <apex:outputText value="{!record.Trainer_appointed__r.Name}"/>
19      </apex:column>
20      <apex:column>
21        <apex:facet name="header">Fees Finalised for student</apex:facet>
22        <apex:outputText value="{!record.Fees_Finalised_for_student__c}"/>
23      </apex:column>
24    </apex:pageBlockTable>
25  </apex:pageBlock>
26 </apex:page>
```

- Clicking on Preview on Visualforce page, it will show Error on page when Entered Course information is not present in Training Deal Record.



PROJECT WORK: STORY 38

Client wants whenever any record is created in Training Deal object, Email should be send to people in Training Dept. (Harry) as well as to CEO (Shekhar) in BCC format.

We are using Process to send Scheduled Email to Harry after one day of Training Deal Record creation.

This is contradicting previous requirement where client wants Email should be send to Harry after one day of Training Deal is created. but right now Client wants to send Email on creation of new Training deal to CEO in BCC and Training Department person (Harry) in TO address. So accordingly Code will be written.



PROJECT WORK: STORY 39

Client wants to create Discount Calculator in Vf page where discount is given to candidates depending on some conditions.

- Visualforce Page Name: DiscountCalculatorVFPage

```
1 <apex:page>
2   <apex:form id="frm">
3     <style>
4       #ct{
5         text-align:center;
6         font-size: x-large;
7       }
8     </style>
9
10   <div id="ct">
11     <h><p style="color:blue;">Discount Calculator</p></h>
12
13   </div>
14   <apex:pageBlock title="Discount Calculator">
15     <apex:pageBlockSection columns="2" id="pbs">
16
17       <apex:outputLabel>Number Of Students</apex:outputLabel>
18       <apex:inputText value="StudentsCount" id="id1"/>
19
20       <apex:outputLabel>Number Of Courses</apex:outputLabel>
21       <apex:inputText value="CourseCount" id="id2" />
22
23     </apex:pageBlockSection>
24
25     <apex:pageBlockButtons id="pbb" >
26       <apex:commandButton value="Calculate Discount" action="{!CalculateDiscount}" />
27     </apex:pageBlockButtons>
28
29     <apex:pageBlockSection columns="2" >
30
31       <apex:outputLabel>Discount Given</apex:outputLabel>
32       <apex:outputText value="discount" ></apex:outputText>
33
34     </apex:pageBlockSection>
35   </apex:pageBlock>
36 </apex:form>
37 </apex:page>
```



- Apex Class(Controller) Name : DiscountCalculatorController

```
Code Coverage: None | API Version: S2 ▾
1 public class DiscountCalculatorController {
2
3     //Declaration of Variables
4     Public Integer StudentCount{get; set; }
5     Public Integer CourseCount{get; set; }
6     Public Integer discount{get; set; }
7
8     //Declaration of Calculate Discount method
9     Public void CalculateDiscount(){
10
11         //Logic to calculate Discount for 1 Student and 1 Course
12         if(StudentCount == 1 && CourseCount == 1 ){
13             discount = 0;
14         }
15         //Logic to calculate Discount for 1 Student and Many Courses and Discount should not more than 60%
16         if(StudentCount == 1 && CourseCount > 1 ){
17
18             discount = 10 * (CourseCount);
19
20             if(discount < =60){
21                 discount = 10 * (CourseCount);
22             }else{
23                 discount = 60;
24             }
25         }
26         //Logic to calculate Discount for Many Student and 1 Course and Discount should not more than 60%
27         if(StudentCount > 1 && CourseCount == 1 ){
28
29             discount = 15 * (StudentCount);
30
31             if(discount < =60){
32                 discount = 15 * (StudentCount);
33             }else{
34                 discount = 60;
35             }
36         }
37         //Logic to calculate Discount for Many Students and Many Courses and Discount should not more than 60%
38         if(StudentCount > 1 && CourseCount > 1 ){
39
40             discount = (15 * (StudentCount)) + (10 * (CourseCount));
41
42             if(discount < =60){
43                 discount = (15 * (StudentCount)) + (10 * (CourseCount));
44             }else{
45                 discount = 60;
46             }
47         }
48     }
49 }
```



- Clicking on Preview on VF page, it will show following results.

1) Discount for 1 Student and 1 Course

Discount Calculator

Discount Calculator **Calculate Discount**

Number Of Students

Number Of Courses

Discount Given (%)

Calculate Discount

2) Discount for 1 Student and Many Courses and Discount should not be more than 60%

Discount Calculator

Discount Calculator **Calculate Discount**

Number Of Students

Number Of Courses

Discount Given (%)

Calculate Discount

3) Discount for Many Student and 1 Course and Discount should not be more than 60%

Discount Calculator

Discount Calculator **Calculate Discount**

Number Of Students

Number Of Courses

Discount Given (%)

Calculate Discount



4) Discount for Many Students and Many Courses and Discount should not be more than 60%

Discount Calculator

Discount Calculator	Calculate Discount
Number Of Students	<input type="text" value="2"/>
Number Of Courses	<input type="text" value="3"/>
Discount Given (%)	<input type="text" value="60"/>
Calculate Discount	

PROJECT WORK: STORY 40

Client wants above Vf page to calculate discount should be used by field level people.

This can be achieved by creating Lightening app and using it in Salesforce1 Mobile app.

- Lightening Enabled VFPage

Visualforce Pages

Visualforce Page
DiscountCalculatorVFPage

Page Edit

Page Information

Label: **DiscountCalculatorVFPage**
Name: **DiscountCalculatorVFPage**
Description:
Available for Lightning Experience, Experience Builder sites, and the mobile app
Require CSRF protection on GET requests

Visualforce Markup

```
<apex:page controller="DiscountCalculatorController">
<apex:form id="frm">
<style>
#ct{
    text-align:center;
    font-size:17px;
    vertical-align:
```



- Adding Lightning Enabled VF Page in Lightning App using Lightning App Builder

Created new App called “Intelogik” and added page to that App Page.

The screenshot shows the Lightning App Builder interface. At the top, there's a navigation bar with 'Lightning App Builder', 'Pages', and 'Intelogik'. Below the navigation is a toolbar with icons for back, forward, search, and save. The main area is divided into two sections: 'Components' on the left and 'Page > Visualforce' configuration on the right. The 'Components' section lists various Salesforce components like Einstein Next Best Action, Flow, Launchpad, List View, etc. The 'Page > Visualforce' section shows the configuration for a Visualforce page named 'DiscountCalculatorVFPage'. It includes fields for 'Label' (Leave blank for default...), 'Visualforce Page Name' (DiscountCalculatorVFPage), and 'Height (in pixels)' (300). A 'Set Component Visibility' section with a 'Filters' button is also present.

The screenshot shows the Intelogik Lightning App interface. At the top, there's a navigation bar with 'All', 'Search...', 'Home', 'Student Masters', 'Course Masters', 'Trainer Masters', 'Placement Details', and 'Training Deals'. Below the navigation is a header for 'DiscountCalculatorVFPage'. The main content area contains a 'Discount Calculator' component with three input fields: 'Number Of Students', 'Number Of Courses', and 'Discount Given (%)', each with a 'Calculate Discount' button. Below this is a 'Quarterly Performance' section showing financial data: 'CLOSED ₹31,35,000', 'OPEN (>70%) ₹6,65,000', and 'GOAL --'. A line chart at the bottom tracks performance over time, with values 4.5M and 3.6M visible on the y-axis.



- Discount Calculator using Salesforce1

The screenshot shows a Salesforce1 mobile application interface. At the top, there is a header bar with a user profile icon, a search icon, a bell icon, and a more options icon. Below the header, the brand name "Intelogik" is displayed with a gear icon. A welcome message "Welcome to Salesforce1!!!!!!" is shown in a box. The main content area is titled "DiscountCalculatorVFPage" and contains a section titled "Discount Calculator". This section includes a "Discount Calculator" button, three input fields for "Number Of Students", "Number Of Courses", and "Discount Given (%)", and a "Calculate Discount" button. At the bottom of the screen, there is a navigation bar with icons for Opportunities, Leads, Tasks, Files, and Menu.



PROJECT WORK: STORY 43

Client wants to check Background of Trainer by verifying LinkedIn Profile URL in Trainer Master Object. Client wants to verify all Trainers LinkedIn Profile URL periodically and depending on that Verification Status should be updated.

This can be achieved using Batch Class as we need to check thousands of Trainers record which is not possible using normal APEX Class.

- Apex Class Name: TrainersBackgroundCheckBatchClass

The screenshot shows the code editor for the TrainersBackgroundCheckBatchClass.apxc file. The code implements the Database.Batchable<sObject> interface. It starts with a start() method that queries for Trainer_Master records where id is not null. The execute() method iterates through each record in the batch. For each record, it checks if the Linked_In_Profile_c field is null. If it is, the Verification_Status_c is set to 'Details Needed'. If it's not null, it checks the Background_Check_Done_Yes_No_c field. If it's false, the status is 'Non-Verified'. If it's true, the status is 'Verified'. Finally, the update() method is called on the scope. The finish() method is also implemented.

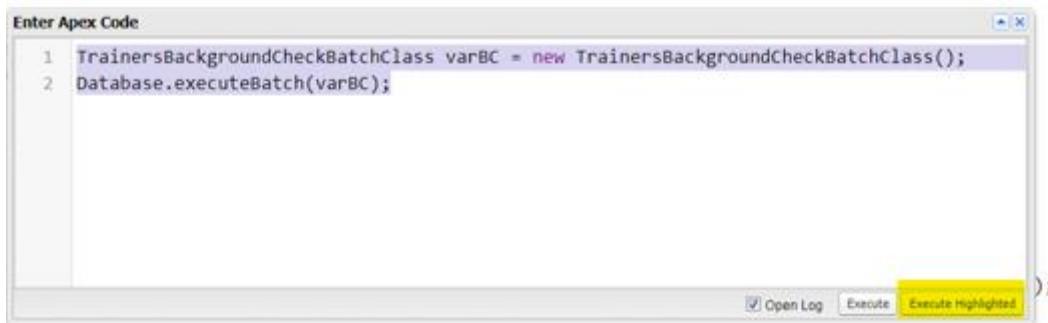
```
1 - global class TrainersBackgroundCheckBatchClass implements Database.Batchable<sObject> {
2
3 -     global Database.QueryLocator start(Database.BatchableContext BC) {
4 -         // collect the batches of records or objects to be passed to execute
5
6 -         String query = 'SELECT id, Verification_Status__c,Background_Check_Done_Yes_No__c,Linked_In_Profile__c FROM Trainer_Master__c WHERE id != null';
7 -         return Database.getQueryLocator(query);
8
9     }
10    global void execute(Database.BatchableContext BC, List<Trainer_Master__c> scope){
11        // process each batch of records
12        for(Trainer_Master__c VarTM : scope){
13
14            if(VarTM.Linked_In_Profile__c == NULL){
15
16                VarTM.Verification_Status__c = 'Details Needed';
17
18            } else{
19
20                if(VarTM.Background_Check_Done_Yes_No__c == false){
21
22                    VarTM.Verification_Status__c = 'Non-Verified';
23
24                }else if(VarTM.Background_Check_Done_Yes_No__c == true){
25
26                    VarTM.Verification_Status__c = 'Verified';
27
28                }
29            }
30        }
31
32        update scope;
33    }
34    global void finish(Database.BatchableContext BC){
35        // execute post-processing operations
36        // In this case Client wants to update fields of Thousands of Trainers Record
37        // and does not want to perform any operation
38    }
}
```

- Before executing Batch Class it is better to De activate all Validations Rules on that Object otherwise sometimes Batch class won't be executed.



INTELOGIK-INTERNSHIP PROGRAM

- Manual Execution of Batch Class using Anonymous Window



- Apex Job

Apex Jobs										Help for this Page		
Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.												
View:		All		Create New View								
Action	Submitted Date	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class	Apex Method	Apex Job ID
8/10/2021, 10:49 AM	Batch Apex	Completed			1	1	0	Shekhar	8/10/2021, 10:49 AM	TrainersBackgroundCheckBatchClass		7075g00000UgVuJ

- Result after Execution of Batch Class

(1) When Linked In Profile is Blank then Verification Status = Details Needed.

Trainer Master
TM-15

Trainer's Personal Details Section

First Name: Aditya
Last Name: Nayak

Trainer's Professional Details Section

Education: ME
Experience: Background Check Done (Yes/No)
Technology of Training: JavaScript
Fees per Student: United in Profile
Trainer Category: Bronze

Verification Status: Details Needed



INTELOGIK-INTERNSHIP PROGRAM

(2) When Linked In Profile is Entered and Background Check Done checkbox is Unchecked then Verification Status =Non-Verified.

Trainer Master
TM-16

First Name Vinit	Country India
Last Name Aggarwal	
Trainer's Professional Details Section	
Education BE	<input type="checkbox"/> Background Check Done(Yes/No)
Experience	<input checked="" type="checkbox"/> Verification Status Non-Verified
Technology of Training	Fees per Student
Trainer Category Bronze	<input type="checkbox"/> Linked In Profile www.linkedin.com/in/yourname123

(3) When Linked In Profile is Entered and Background Check Done checkbox is Checked then Verification Status =Verified.

Trainer Master
TMTC-6

First Name Arun	Country India
Last Name Thakur	
Trainer's Personal Details Section	
Education BCA	<input checked="" type="checkbox"/> Background Check Done(Yes/No)
Experience 6.0	<input checked="" type="checkbox"/> Verification Status Verified
Technology of Training Hadoop	Fees per Student ₹5,000.0
Trainer Category Silver	<input type="checkbox"/> Linked In Profile www.linkedin.com/in/yourname11111



PROJECT WORK: STORY 44

Client wants to execute this Batch Class to be executed on every Monday 10 AM without code.

This can be achieved by creating Schedulable Class and using this class in Schedule Apex to manage scheduling activity.

- Schedule Apex Class Name: TrainersBackgroundCheckScheduleClass

```
TrainersBackgroundCheckScheduleClass.apxc
Code Coverage: None API Version: 52
1 * global class TrainersBackgroundCheckScheduleClass implements Schedulable {
2     global void execute(SchedulableContext sc){
3         //calling Batch class in this Schedule class
4         TrainersBackgroundCheckBatchClass VarBC = new TrainersBackgroundCheckBatchClass ();
5         Database.executeBatch(VarBC);
6     }
7 }
8 }
```

- Schedule Apex



INTELOGIK-INTERNSHIP PROGRAM

Schedule Apex

Schedule an Apex class that implements the 'Scheduled' interface to be automatically executed on a weekly or monthly interval.

Save Cancel

Job Name: Trainer Master Data Upda
Apex Class: TrainersBackgroundCheck

Schedule Apex Execution

Frequency: Weekly Monthly

Recur every week on:

Sunday
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday

Start: 8/1/2021 [8/10/2021]
End: 10/1/2021 [8/10/2021]

Preferred Start Time: 10:00 AM

Exact start time will depend on job queue activity.

• Schedule Job

SETUP Scheduled Jobs

All Scheduled Jobs Help for this Page

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: [All Scheduled Jobs](#) [Create New View](#)

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | Other [All](#)

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	Metalytics Data Loader Job for Org : 00D5g000005KJW6	User_Integration	6/20/2021, 6:01 PM	8/10/2021, 7:53 AM	8/11/2021, 7:53 AM	K
Manage Del	Trainer Master Data Update Weekly	Shekhar	8/10/2021, 12:32 PM		8/16/2021, 10:00 AM	Scheduled Apex

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | Other [All](#)

PROJECT WORK: STORY 45



INTELOGIK-INTERNSHIP PROGRAM

Client wants to execute this Batch Class to be executed on Last Friday of Every month at 6 PM with code .Because configuration way has few limitations so Schedule this Batch Class using CRON Expressions in code

This can be achieved by creating Schedulable Class using

CRON Expression: 0 0 18 ? * 6L.

- Manual Execution of Scheduled Class using CRON Expression using Anonymous Window

- CRON Expression = ‘0 0 18 ? *6L’ written for Last Friday of Every month at 6 PM
- In System.Schedule ,we need to mention 3 parameter.
 - Job Title : Schedule Job Every Friday @ 6PM
 - CRON Expression: ‘0 0 18 ? *6L’
 - Schedule class name: TrainersBackgroundCheckScheduleClass

Enter Apex Code

```
1 String CRONExpression = '0 0 18 ? * 6L';
2 System.schedule('Schedule Job Every Friday @ 6PM', CRONExpression, new TrainersBackgroundCheckScheduleClass());
```

Open Log

- Schedule Job

SCHEDULED JOBS

All Scheduled Jobs

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: [All Scheduled Jobs](#) [Create New View](#)

[Help for this Page](#)

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	Metalytics Data Loader Job for Org : 00D5g000005KJW6	User_Integration	6/20/2021, 6:01 PM	8/10/2021, 7:53 AM	8/11/2021, 7:53 AM	K
Manage Del	Schedule Job Every Friday @ 6PM	Shekhar	8/10/2021, 1:08 PM		8/27/2021, 6:00 PM	Scheduled Apex
Manage Del	Trainer Master Data Update Weekly	Shekhar	8/10/2021, 12:32 PM		8/16/2021, 10:00 AM	Scheduled Apex



PROJECT WORK: STORY 46

Client wants to know the count of how many Trainers are ‘Non-Verified’ after Batch Apex is executed and send Email to CEO regarding it.

This can be achieved by using Database.Stateful Interface to count number of “Non-Verified” trainers after execution of Batch Apex.

Apex code for Email sending is written in Finish() method of Batch Class.

- Apex Class Name: TrainersBackgroundCheckBatchClass

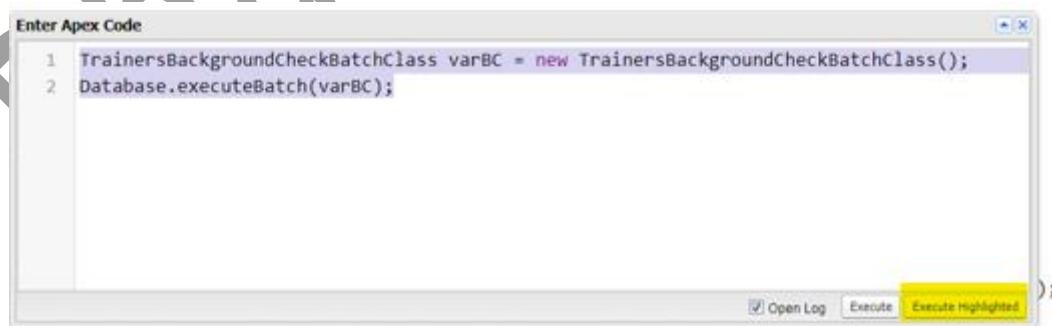
```
1 global class TrainersBackgroundCheckBatchClass implements Database.Batchable<sObject>,Database.Stateful {
2     global integer VarCountOfNonVerifiedTrainer =0;
3
4     global Database.QueryLocator start(Database.BatchableContext BC) {
5         // collect the batches of records or objects to be passed to execute
6
7         String query = 'SELECT id, Verification_Status__c,Background_Check_Done_Yes_No__c,Linked_In_Profile__c FROM Trainer_Master__c';
8         return Database.getQueryLocator(query);
9
10    }
11
12    global void execute(Database.BatchableContext BC, List<Trainer_Master__c> scope){
13        // process each batch of records
14
15        for(Trainer_Master__c VarTM : scope){
16
17            if(VarTM.Linked_In_Profile__c == NULL){
18
19                VarTM.Verification_Status__c = 'Details Needed';
20
21            }
22            else{
23
24                if(VarTM.Background_Check_Done_Yes_No__c == false){
25
26                    VarTM.Verification_Status__c = 'Non-Verified';
27
28                    VarCountOfNonVerifiedTrainer = VarCountOfNonVerifiedTrainer + 1;
29
30                }else if(VarTM.Background_Check_Done_Yes_No__c == true){
31
32                    VarTM.Verification_Status__c = 'Verified';
33                }
34            }
35        }
36        update scope;
37    }
38    global void finish(Database.BatchableContext BC){
39        // send Email to CEO regarding trainer's count who are 'non-verified'
40
41        //Create a master list to hold the emails we'll send
42
43        List<Messaging.SingleEmailMessage> mails = new List<Messaging.SingleEmailMessage> ();
```



INTELOGIK-INTERNSHIP PROGRAM

```
44      List<Profile> userBCC = [SELECT id FROM profile WHERE Name='System Administrator'];
45
46
47  for(User sysAdminUser :[Select id,Email,LastName from user where ProfileID IN:userBCC]) {
48      String subject = 'Count of Non-Verified Trainers record Information.';
49      String body = 'Mr Shekar \n\n'+
50          'Hope you are doing Good!!!!!!!!!!!!!!.\n\n'+
51          'Please have a look at the Count of Non-Verified Trainers record Information..\n\n'+
52          'Number of UnVerified Trainers :'+ VarCountOfNonVerifiedTrainer + '\n'+
53          'Thank You!!!!!!!!!!!!!!';
54
55      // Create a new Email
56
57      Messaging.SingleEmailMessage mail = new Messaging.SingleEmailMessage();
58
59      // Now sets the below paramaters of the email object
60      mail.setSubject( subject );
61      mail.setPlainTextBody( body );
62
63      // Set list of people who should be BCC'ed
64      List<String> Toaddr = new List<String>();
65      Toaddr.add(sysAdminUser.Email);
66
67      mail.setBccAddresses(Toaddr);
68
69      // assign user
70      mail.setTargetObjectId(sysAdminUser.Id);
71      mail.setSaveAsActivity(false);
72
73      // Add your email to the master list
74      mails.add(mail);
75  }
76
77  // Send all emails in the master list
78
79  Messaging.sendEmail(mails);
80
81 }
```

- Manual Execution of Batch Class using Anonymous Window



- Result after Execution of Batch Class



Count of Non-Verified Trainers record Information. Inbox X

Shekhar via x1szavjx0bi2v7.5g-5kjw6eao.ap24.bnc.salesforce.com
to me ▾

Mr Shekar

Hope you are doing Good!!!!!!!!!!!!.

Please have a look at the Count of Non-Verified Trainers record Information..

Number of UnVerified Trainers :5
Thank You!!!!!!!!!!!!!!

Reply Forward

PROJECT WORK: STORY 47

Project Trouble shooting Scenario: There are few queries inside FOR loop and when code is executing it is hitting Governer limit and generating 101 error.

This problem can be overcome by using Future Method.

- Apex Class Name: UseOfFutureFunctionClass

```
1 public class UseOfFutureFunctionClass {  
2  
3     public static void Generate101Error(){  
4         for(Integer i=0;i<=100;i++){  
5             Account a = [SELECT Id FROM account LIMIT 1];  
6         }  
7     }  
8 }
```



INTELOGIK-INTERNSHIP PROGRAM

- Manual Execution of Batch Class using Anonymous Window

Enter Apex Code

```
1 UseOfFutureFunctionClass.Generate101Error();
```

Open Log **Execute** Execute Highlighted

- 101 Error after Execution of Class

Logs, Tests, and Problems						
User	Application	Operation	Time	Status	Read	Size
Shekhar	Unknown	/services/data/v52....	8/13/2021, 3:02:02...	Too many SOQL queries: 101	Unre...	74.98 KB

Execute Anonymous Error

Line: 5, Column: 1

System.LimitException: Too many SOQL queries: 101

OK

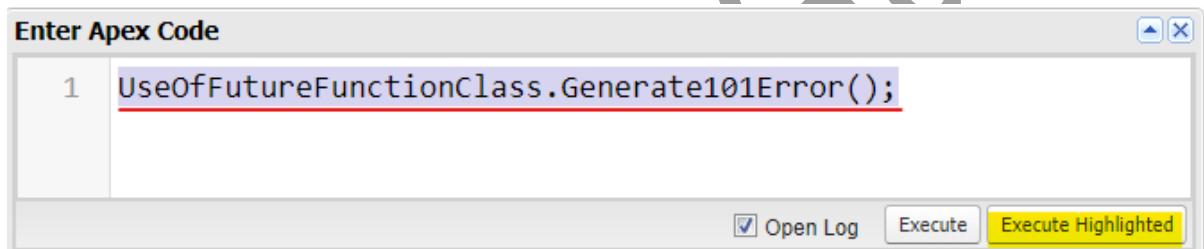
- Use of “Future Method” to by pass 101 Error



INTELOGIK-INTERNSHIP PROGRAM

```
1 ▼ public class UseOfFutureFunctionClass {  
2  
3     @future  
4 ▼     public static void Generate101Error(){  
5 ▼         for(Integer i=0;i<=150;i++){  
6             Account a = [SELECT Id FROM account LIMIT 1];  
7         }  
8     }  
9 }
```

- Manual Execution of Batch Class using Anonymous Window



- Result after Execution of Future Method

No Error. Class with Future method executed with no Error.

The screenshot shows the 'Execution Log' and 'Logs, Tests, and Problems' sections of the Salesforce interface.

Execution Log:

Timestamp	Event	Details
15:08:49:001	CODE_UNIT_STARTED [EXTERNAL]	execute_anonymous_apex
15:08:49:002	STATEMENT_EXECUTE [1]	
15:08:49:002	STATEMENT_EXECUTE [1]	
15:08:49:034	CODE_UNIT_FINISHED	execute_anonymous_apex

Logs, Tests, and Problems:

User	Application	Operation	Time	Status	Read	Size
Shekhar	Unknown	/services/data/v52.0/to...	8/13/2021, 3:08:49 PM	Success		2.09 KB
Shekhar	Unknown	FutureHandler	8/13/2021, 3:08:49 PM	Success	Unread	113 KB
Shekhar	Unknown	/services/data/v52.0/to...	8/13/2021, 3:04:54 PM	Too many SOQL queries: 101	Unread	74.88 KB
Shekhar	Unknown	/services/data/v52.0/to...	8/13/2021, 3:02:02 PM	Too many SOQL queries: 101	Unread	74.98 KB



PROJECT WORK: STORY 48

Client wants one UI Page to get information of vendor with some input fields and buttons.

This can be achieved using Visualforce Page.

- Apex Class(Controller) Name : VendorInformationController

```
VendorInformationController.apxc [ VendorInformationVFPage.vfp ]
Code Coverage: None API Version: 52
1 public with sharing class VendorInformationController {
2
3     //Declaration of Variables
4     Public String VendorCompanyName{set;get;}
5     Public String VendorContactPerson{set;get;}
6     Public String AmountPerEvent{set;get;}
7     Public String City{set;get;}
8     Public String Country{set;get;}
9
10
11    //Declaration of Send Email method
12    Public void SendEmail(){
13    }
14
15    //Declaration of generate PDF method
16    Public void GeneratePDF(){
17    }
18
19    //Declaration of Reset method
20    Public void Reset(){
21    }
22 }
```

- Visualforce Page Name: VendorInformationVFPage



INTELOGIK-INTERNSHIP PROGRAM

```
VendorInformationController.apxc [ VendorInformationVFPPage.vfp ]  
Preview API Version: 52  
  
1 <apex:page controller="VendorInformationController">  
2   <apex:form>  
3     <style>  
4       #ct{  
5         text-align:center;  
6         font-size: xx-large;  
7       }  
8     </style>  
9     <div id="ct">  
10       <h1>Vendor Registration Form</h1>  
11     </div>  
12  
13     <apex:pageBlock >  
14  
15       <apex:pageBlockSection title="Vendor Information Section" columns="2" >  
16  
17         <apex:outputLabel>Vendor Company Name</apex:outputLabel>  
18         <apex:inputText value="{!!VendorCompanyName}" />  
19  
20         <apex:outputLabel>Vendor Contact Person</apex:outputLabel>  
21         <apex:inputText value="{!!VendorContactPerson}" />  
22  
23         <apex:outputLabel>Amount Per Event</apex:outputLabel>  
24         <apex:inputText value="{!!AmountPerEvent}" />  
25  
26         <apex:outputLabel>City</apex:outputLabel>  
27         <apex:inputText value="{!!City}" />  
28  
29  
30         <apex:outputLabel>Country</apex:outputLabel>  
31         <apex:inputText value="{!!Country}" />  
32  
33     </apex:pageBlockSection>  
34  
35     <apex:pageBlockButtons >  
36       <apex:commandButton value="Send Email" action="{!!SendEmail}" />  
37       <apex:commandButton value="Generate PDF" action="{!!GeneratePDF}" />  
38       <apex:commandButton value="Reset" action="{!!Reset}" />  
39     </apex:pageBlockButtons>  
40  
41   </apex:pageBlock>  
42 </apex:form>  
43 </apex:page>
```

- Clicking on Preview on Visualforce page, it will show page with 5 input field and ‘Send Email’, ‘Generate PDF’, ‘Reset’ button.

Vendor Registration Form

Vendor Information Section

Vendor Company Name	
Vendor Contact Person	
Amount Per Event	
City	
Country	



Dhanashri Gade

PROJECT WORK: STORY 49

Client wants in ‘Vendors Information’ VF page, there are some validations which should be applied in Client Side only as follows:

- Vendor Person’s name is mandatory.
- Amount per Event is blank then User cannot click on ‘Send Email’ Button.



INTELOGIK-INTERNSHIP PROGRAM

- When City and Country is not mentioned, then User can not generate PDF using 'Generate PDF' Button.

This can be used by using ActionFunction and using functions in javascript in same VF page.

- Apex Class(Controller) Name : VendorInformationController

No logic written in Controller:

```
VendorInformationController.apxc [ ] VendorInformationVFPage.vfp [ ]
Code Coverage: None API Version: 52
1 public with sharing class VendorInformationController {
2
3     //Declaration of Variables
4     Public String VendorCompanyName{set;get;}
5     Public String VendorContactPerson{set;get;}
6     Public String AmountPerEvent{set;get;}
7     Public String City{set;get;}
8     Public String Country{set;get;}
9
10
11    //Declaration of Send Email method
12    Public void SendEmail(){
13    }
14
15    //Declaration of generate PDF method
16    Public void GeneratePDF(){
17    }
18
19    //Declaration of Reset method
20    Public void Reset(){
21    }
22 }
```

- Visualforce Page Name: VendorInformationVFPage



INTELOGIK-INTERNSHIP PROGRAM

```
VendorInformationController.apx: VendorInformationVFPage.vfp
Preview API Version: S2

1 <apex:page controller="VendorInformationController" >
2
3     <script type="text/javascript">
4
5         //Validation to make Vendor Person's Name Mandatory
6
7         function validateName(){
8
9             if(document.getElementById('(!$Component.frm.pb.pbs.id2)').value==''){
10                 alert("Name of Vendor is Mandatory");
11             }
12         }
13         //validation for Send Email button depending on Amount Per Event field
14
15         function validateAmount(){
16
17             if(document.getElementById('(!$Component.frm.pb.pbs.id3)').value==''){
18                 alert("Amount Per Event should be entered");
19             }
20             else{
21                 SendEmail();
22             }
23         }
24
25         //validation for 'Generate PDF' button depending on Country and City
26
27         function validateCityAndCountry(){
28
29             if(document.getElementById('(!$Component.frm.pb.pbs.id4)').value=='' & document.getElementById('(!$Component.frm.pb.pbs.id5)').value==''){
30                 alert("Please enter City and Country");
31             }
32             else{
33                 GeneratePDF();
34             }
35         }
36
37     </script>
38
39     <apex:form id="frm">
40         <style>
41             #ct{
42                 text-align:center;
43                 font-size: xx-large;
44             }
45             </style>
46             <div id="ct">
47                 <h1>Vendor Registration Form</h1>
48             </div>
49
50             <apex:actionFunction action="(!SendEmail)" name="SendEmail" reRender="af1" />
51             <apex:actionFunction action="(!GeneratePDF)" name="GeneratePDF" reRender="af2" />
52             <apex:actionFunction action="(!Reset)" name="Reset" reRender="af3" />
53
54             <apex:pageBlock id="pb">
55                 <apex:pageBlockSection title="Vendor Information Section" columns="2" id="nbs">
56
57                     <apex:outputLabel>Vendor Company Name</apex:outputLabel>
58                     <apex:inputText value="{!VendorCompanyName}" id="id1"/>
59
60                     <apex:outputLabel>Vendor Contact Person</apex:outputLabel>
61                     <apex:inputText value="{!VendorContactPerson}" required="true" id="id2" onclick="validateName();"/>
62
63                     <apex:outputLabel>Amount Per Event</apex:outputLabel>
64                     <apex:inputText value="{!AmountPerEvent}" id="id3" />
65
66                     <apex:outputLabel>City</apex:outputLabel>
67                     <apex:inputText value="{!City}" id="id4"/>
68
69                     <apex:outputLabel>Country</apex:outputLabel>
70                     <apex:inputText value="{!Country}" id="id5"/>
71
72                 </apex:pageBlockSection>
73
74                 <apex:pageBlockButtons >
75                     <apex:commandButton value="Send Email" onclick="validateAmount();"/>
76                     <apex:commandButton value="Generate PDF" onclick="validateCityAndCountry();"/>
77                     <apex:commandButton value="Reset" />
78                 </apex:pageBlockButtons>
79
80             </apex:pageBlock>
81         </apex:form>
82
83     </apex:page>
```

- Clicking on Preview on Visualforce page;



INTELOGIK-INTERNSHIP PROGRAM

- ❖ Vendor's Name is Mandatory alert is shown on clicking in input field for 'Vendor Person's Name'.

A screenshot of a Salesforce Visualforce page titled "Vendor Information Section". The page contains fields for Vendor Company Name (ACC Corp), Vendor Contact Person (Ajay), Amount Per Event (10000), City (Bangalore), and Country (India). A red box highlights the "Amount Per Event" field, which is currently empty. An alert message box is displayed over the page, reading "d5g000005kjw6ao-dev-ed--c.visualforce.com says Name of Vendor is Mandatory" with an "OK" button.

- ❖ Amount per Event is blank then User cannot click on 'Send Email' Button.

A screenshot of a Salesforce Visualforce page titled "Vendor Information Section". The page contains fields for Vendor Company Name (ACC Corp), Vendor Contact Person (Ajay), Amount Per Event (empty), City (Bangalore), and Country (India). A red box highlights the "Amount Per Event" field, which is empty. An alert message box is displayed over the page, reading "d5g000005kjw6ao-dev-ed--c.visualforce.com says Amount Per Event should be entered" with an "OK" button.

- ❖ City and Country is blank then User cannot click on 'Generate PDF' Button.

A screenshot of a Salesforce Visualforce page titled "Vendor Information Section". The page contains fields for Vendor Company Name (ACC Corp), Vendor Contact Person (Ajay), Amount Per Event (10000), City (empty), and Country (empty). Red boxes highlight the "City" and "Country" fields, which are empty. An alert message box is displayed over the page, reading "d5g000005kjw6ao-dev-ed--c.visualforce.com says Please enter City and Country" with an "OK" button.



PROJECT WORK: STORY 50

Client wants on clicking ‘Generate PDF’ button, It should give Vendor’s Information in PDF format

This can be used by new VF Page=”VendorInformationInPDF” where renderAs=”PDF” used to get data in PDF format.

This new VF Page is called in previous VFPage by using action=”/apex/VendorInformationInPDF” in Apex:Command Button ‘Generate PDF’.

- Apex Class(Controller) Name : VendorInformationController

No logic written in Controller:

```
VendorInformationController.apxc  VendorInformationVFPPage.vfp
Code Coverage: None API Version: 52
1 public with sharing class VendorInformationController {
2
3     //Declaration of Variables
4     Public String VendorCompanyName{set;get;}
5     Public String VendorContactPerson{set;get;}
6     Public String AmountPerEvent{set;get;}
7     Public String City{set;get;}
8     Public String Country{set;get;}
9
10
11    //Declaration of Send Email method
12    Public void SendEmail(){
13    }
14
15    //Declaration of generate PDF method
16    Public void GeneratePDF(){
17    }
18
19    //Declaration of Reset method
20    Public void Reset(){
21    }
22}
```



INTELOGIK-INTERNSHIP PROGRAM

- Visualforce Page Name: VendorInformationInPDF

```
VendorInformationController.apxc | VendorInformationVFPage.vfp | VendorInformationInPDF.vfp
Preview API Version: 52
1 <apex:page controller="VendorInformationController" renderAs="PDF">
2 <apex:form>
3
4 <apex:pageBlock id="pb">
5
6 <apex:pageBlockSection title="Vendor Information Section" columns="2" id="pbs">
7
8 <apex:outputLabel>Vendor Company Name :&nbsp;</apex:outputLabel>
9 <apex:outputText> {!VendorCompanyName}</apex:outputText>
10
11 <apex:outputLabel>Vendor Contact Person :&nbsp;</apex:outputLabel>
12 <apex:outputText> {!VendorContactPerson}</apex:outputText>
13
14 <apex:outputLabel>Amount Per Event :&nbsp;</apex:outputLabel>
15 <apex:outputText> {!AmountPerEvent}</apex:outputText>
16
17 <apex:outputLabel>City :&nbsp;</apex:outputLabel>
18 <apex:outputText> {!City}</apex:outputText>
19 |
20 <apex:outputLabel>Country :&nbsp;</apex:outputLabel>
21 <apex:outputText> {!Country}</apex:outputText>
22
23 </apex:pageBlockSection>
24
25 </apex:pageBlock>
26 </apex:form>
27
28 </apex:page>
```

Dhanashri



INTELOGIK-INTERNSHIP PROGRAM

- Visualforce Page Name: VendorInformationVFPage

```
VendorInformationController.apxc | VendorInformationVFPage.vfp | VendorInformationInPDF.vfp |
Preview API Version: 52 | 
```

```
1 * <apex:page controller="VendorInformationController">
2
3     <script type="text/javascript">
4
5         //Validation to make Vendor Person's Name Mandatory
6
7         function validateName(){
8
9             if(document.getElementById('{$Component.frm.pb.pbs.id2}').value==''){
10                 alert("Name of Vendor is Mandatory");
11             }
12         }
13     </script>
14
15     <script type="text/javascript">
16
17         //validation for Send Email button depending on Amount Per Event field
18
19         function validateAmount(){
20
21             if(document.getElementById('{$Component.frm.pb.pbs.id3}').value== '') {
22                 alert("Amount Per Event should be entered");
23             }
24             else {
25                 SendEmail();
26             }
27         }
28
29     </script>
30     </script>
31
32     <script type="text/javascript">
33
34         //validation for 'Generate PDF' button depending on Country and City
35
36         function validateCityAndCountry(){
37
38             if(document.getElementById('{$Component.frm.pb.pbs.id4}').value=='' && document.getElementById('{$Component.frm.pb.pbs.id5}').value==''){
39                 alert("Please enter City and Country");
40             }
41             else{
42                 GeneratePDF();
43             }
44         }
45
46     </script>
47
48     <apex:form id="frm">
49         <style>
50             #ct{
51                 text-align:center;
52                 font-size: xx-large;
53             }
54         </style>
55         <div id="ct">
56             <h>Vendor Registration Form</h>
57
58         </div>
```





INTELOGIK-INTERNSHIP PROGRAM

```
60
61      <apex:actionFunction action="{!SendEmail}"    name="SendEmail" reRender="af1" />
62      <apex:actionFunction action="{!GeneratePDF}"   name="GeneratePDF" reRender="af2"  />
63      <apex:actionFunction action="{!Reset}"         name="Reset" reRender="af3"  />
64
65  <apex:pageBlock id="pb">
66
67  <apex:pageBlockSection title="Vendor Information Section" columns="2" id="pbs">
68
69      <apex:outputLabel >Vendor Company Name</apex:outputLabel>
70      <apex:inputText value="{!VendorCompanyName}" id="id1"/>
71
72      <apex:outputLabel >Vendor Contact Person</apex:outputLabel>
73      <apex:inputText value="{!VendorContactPerson}" required="true" id="id2" onclick="validateName();"/>
74
75      <apex:outputLabel >Amount Per Event</apex:outputLabel>
76      <apex:inputText value="{!AmountPerEvent}" id="id3"/>
77
78      <apex:outputLabel >City</apex:outputLabel>
79      <apex:inputText value="{!City}" id="id4"/>
80
81      <apex:outputLabel >Country</apex:outputLabel>
82      <apex:inputText value="{!Country}" id="id5"/>
83
84  </apex:pageBlockSection>
85
86  <apex:pageBlockButtons id="ppb" >
87      <apex:commandButton value="Send Email" onclick="validateAmount(); id="ppb1" />
88      <apex:commandButton value="Generate PDF" onclick="validateCityAndCountry(); id="ppb2" action="/apex/VendorInformationInPDF" />
89      <apex:commandButton value="Reset" />
90
91  </apex:pageBlockButtons>
92
93  </apex:pageBlock>
94
95 </apex:form>
96
97 </apex:page>
```

- Clicking on Preview on Visualforce page;

Vendor Registration Form

[Send Email](#) [Generate PDF](#) [Reset](#)

Vendor Information Section

Vendor Company Name	ACC Corp
Vendor Contact Person	Manav
Amount Per Event	10000
City	Bangalore
Country	India

[Send Email](#) [Generate PDF](#) [Reset](#)

❖ Click on 'Generate PDF' button will generate Vendor's Information in PDF format.

Vendor Company Name : ACC Corp	
Vendor Contact Person : Manav	
Amount Per Event : 10000	
City : Bangalore	
Country : India	



INTELOGIK-INTERNSHIP PROGRAM

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