INTELOGIK INTERNSHIP PROGRAM

Table of Contents

PROJECT WORK: STORY 1

Executive Summary:

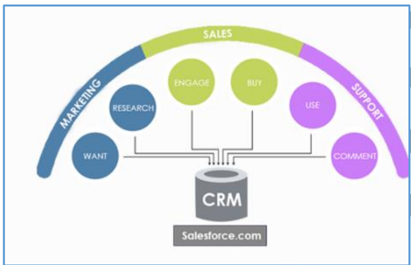
Thank you so much for giving us time for Meeting.

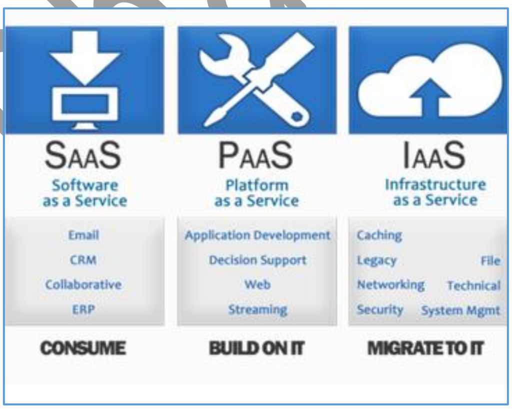
Intelogik has prepared solution as per your requirements.

Intelogik has provided proposed Solution for your Requirement.

SALESFORCE Platform is Solution to your requirement.

<table>
<tr><th>SR NO</th><th>Client’s Requirement</th><th>Proposed Solution From Intelogik Using Salesforce</th></tr>
<tr><td>1</td><td>No Infra Load




</td><td>

- 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 processer 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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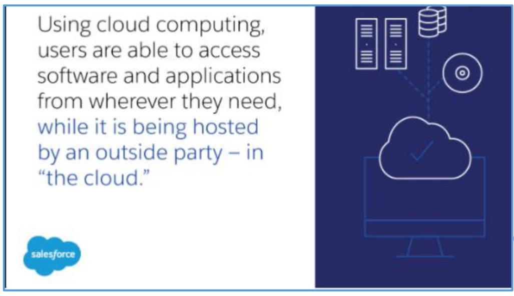
<tr>
<td>2</td>
<td>On cloud



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<td>

- 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.
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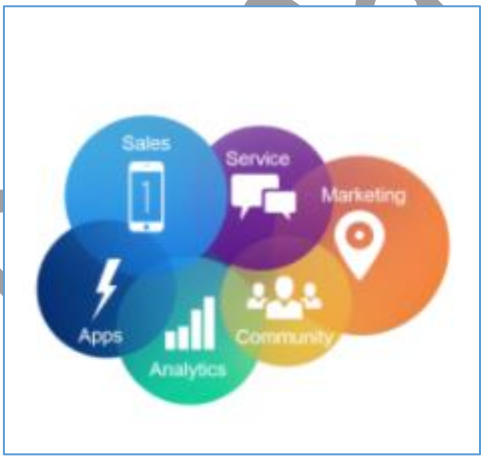
<tr>
<td>3</td>
<td>Flexible app, Easy to customise



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<td>

- 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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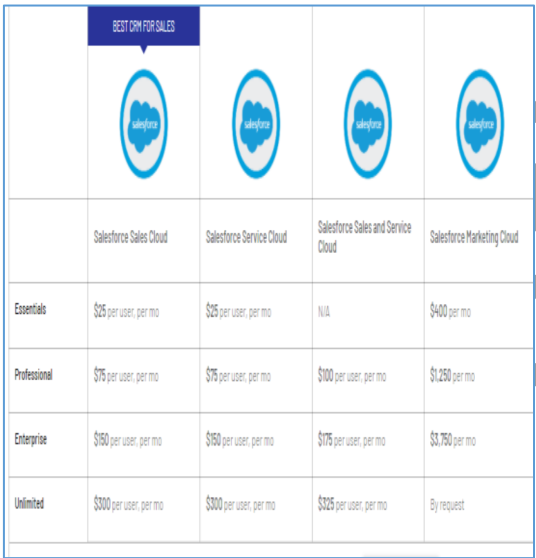
</table>

<table>
<tr><td></td><td></td><td>

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.

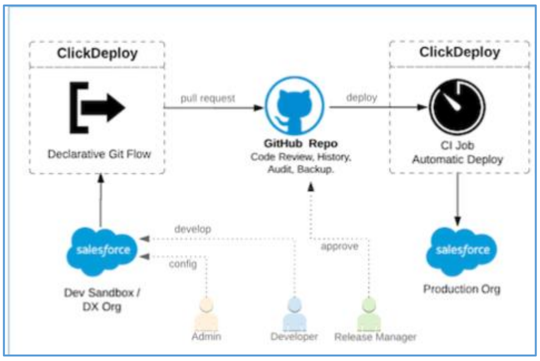
</td></tr>
<tr><td>4.</td><td>Easy payment methods



<table>
<tr><td></td><td>Salesforce Sales Cloud</td><td>Salesforce Service Cloud</td><td>Salesforce Sales and Service Cloud</td><td>Salesforce Marketing Cloud</td></tr>
<tr><td>Essentials</td><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><td>Professional</td><td>$75 per user, per mo</td><td>$75 per user, per mo</td><td>$100 per user, per mo</td><td>$1,250 per mo</td></tr>
<tr><td>Enterprise</td><td>$150 per user, per mo</td><td>$150 per user, per mo</td><td>$175 per user, per mo</td><td>$3,750 per mo</td></tr>
<tr><td>Unlimited</td><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>
</table>
</td><td>

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.

</td></tr>
</table>

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

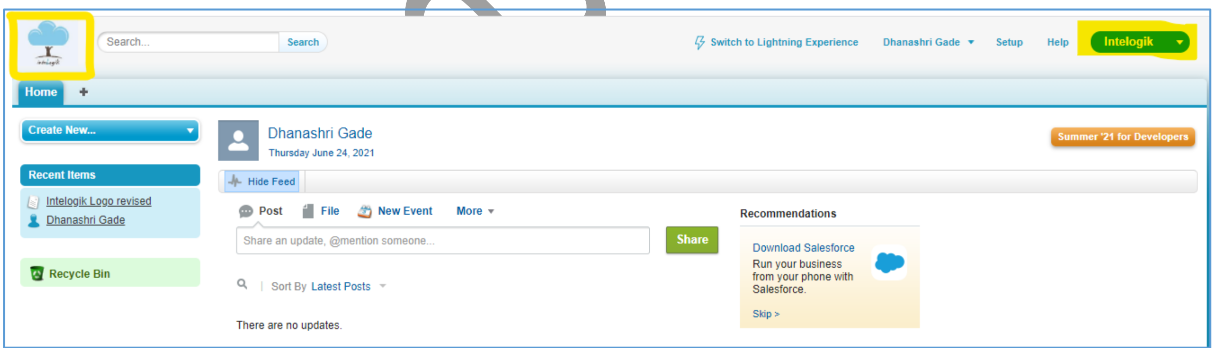
Questions to be asked during Client's meeting Regarding Requirement Elaboration before starting work:

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

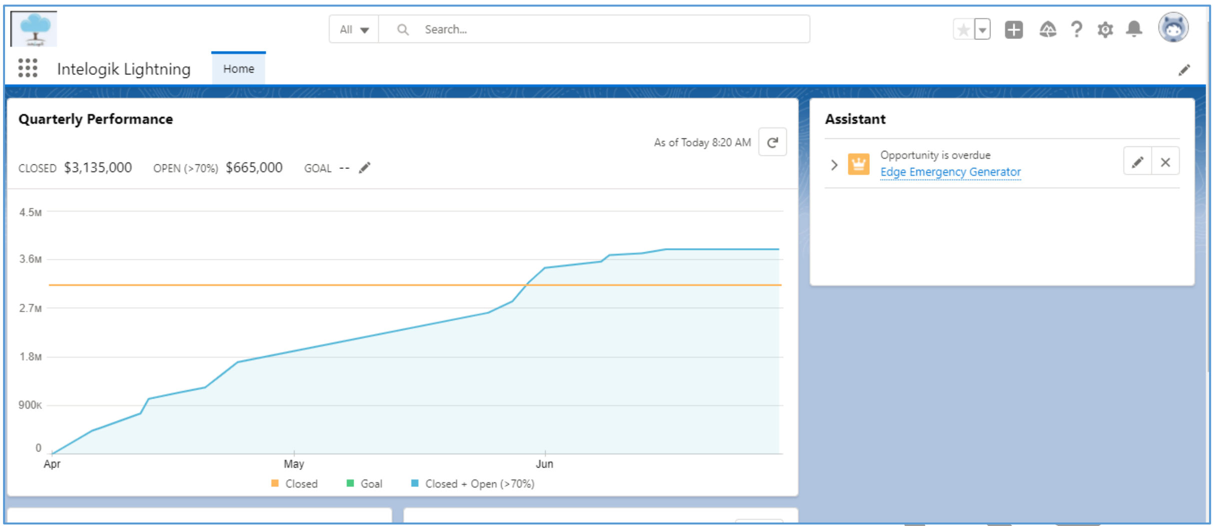
- Client wants to execute all business process on SALESFORCE Platform.

- 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.



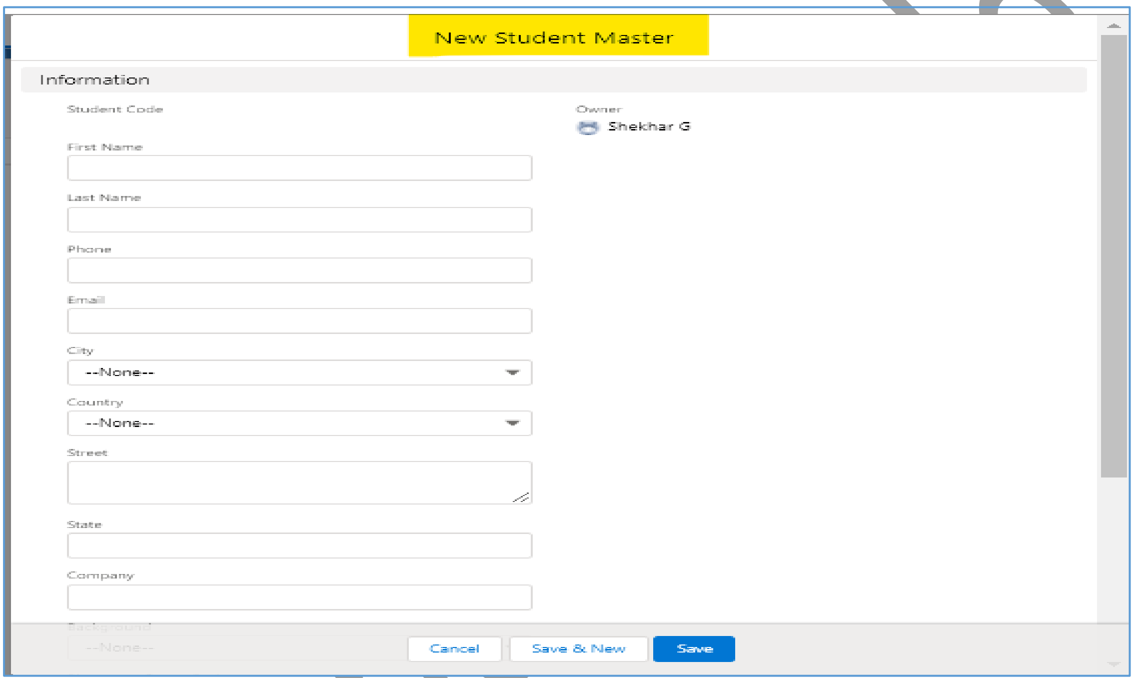
(1).Table Details:

- 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

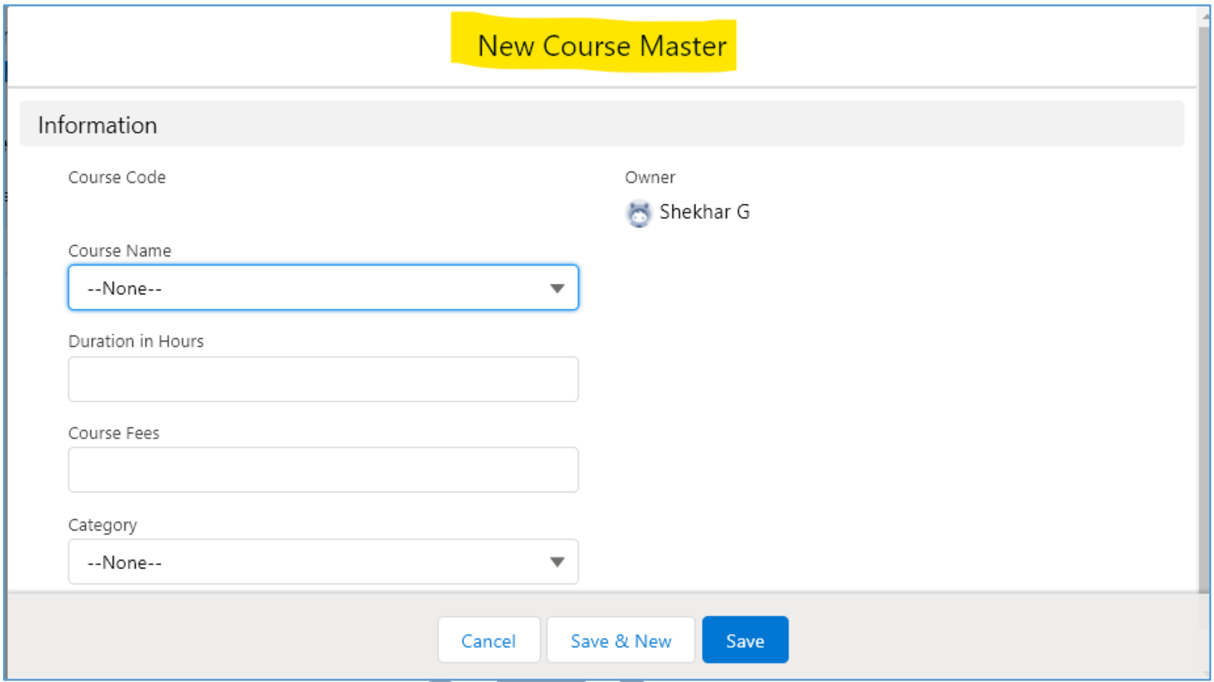
12.	Placement Scope Rating	Text	
13.	PAN Card Number	Text(Encrypted)	
14.	Current Salary	Currency	
15.	Java Ref Id	Text (External Id Field)	
16.	Background Check Status	Text	



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

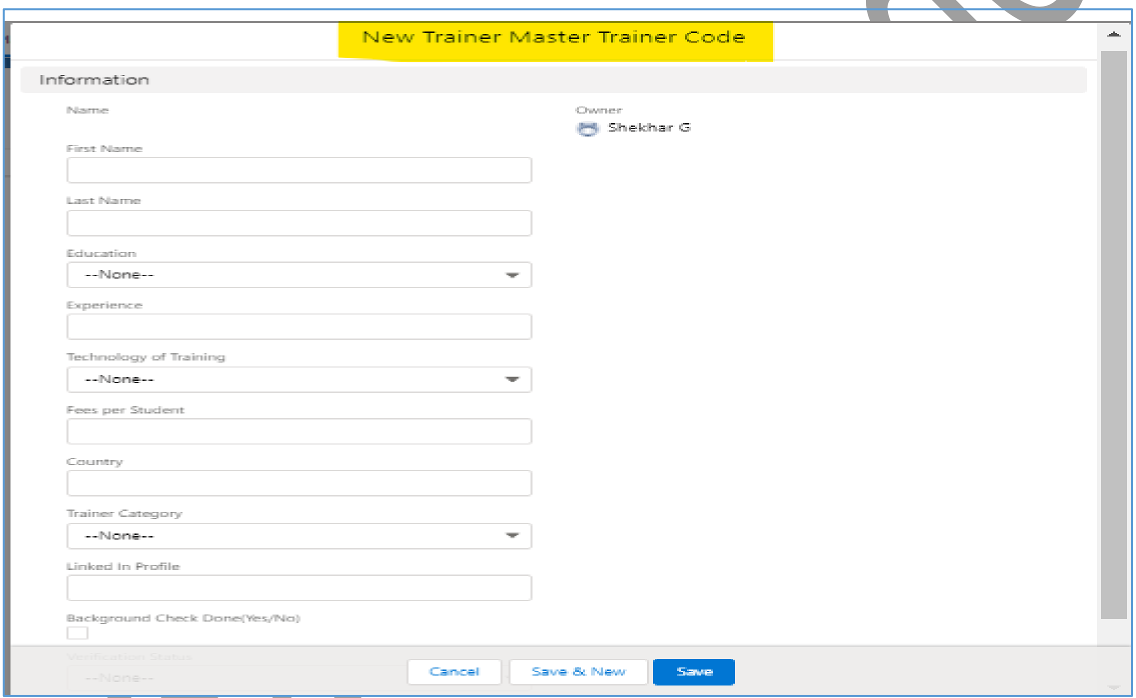
3.	Duration in Hours	Number	
4.	Course Fees	Currency	
5.	Category	Picklist	Cloud Tech, Mobile Tech, Web Tech



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	

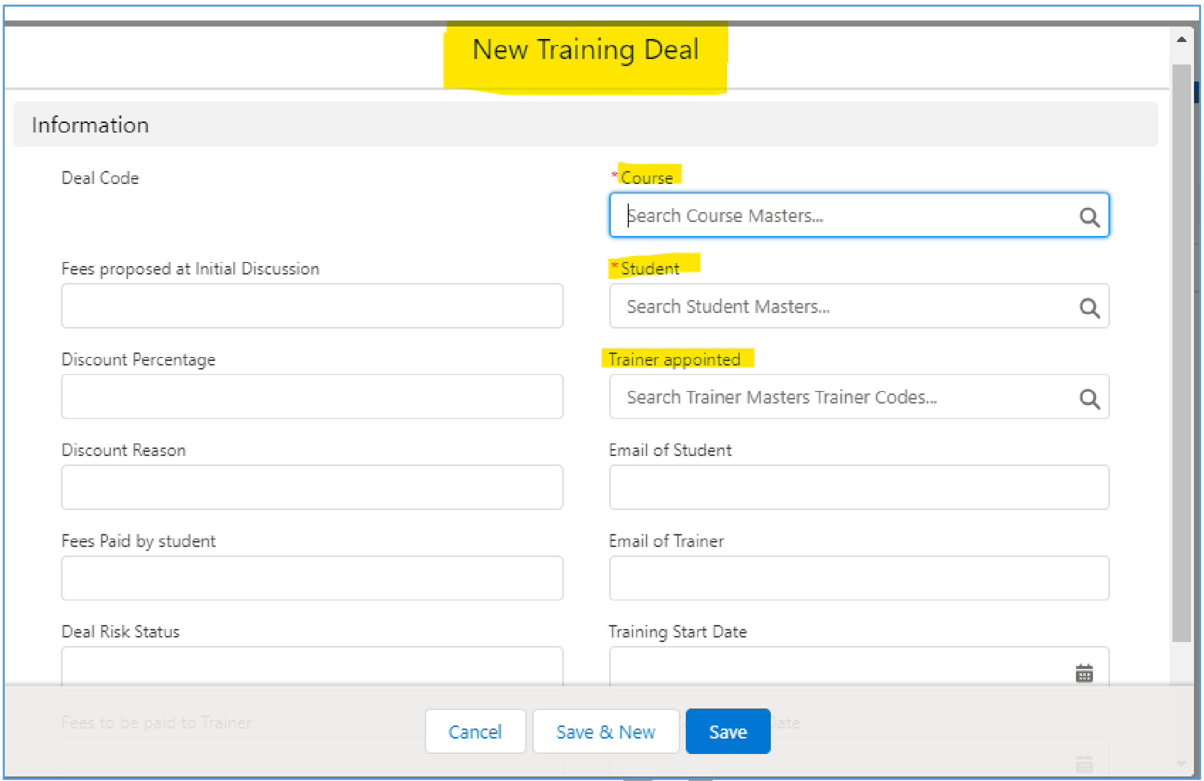
8.	Country	Picklist	India, USA, UK , Australia, Canada
9.	Trainer Category	Picklist	Platinum, Gold, Silver, Bronze
10.	Linked In Profile	URL	
11.	Background Check Done(Yes/No)	Checkbox	
12.	Verification Status	Picklist	Verified, Non Verified, Details Needed



4. Object Name : Training Deal

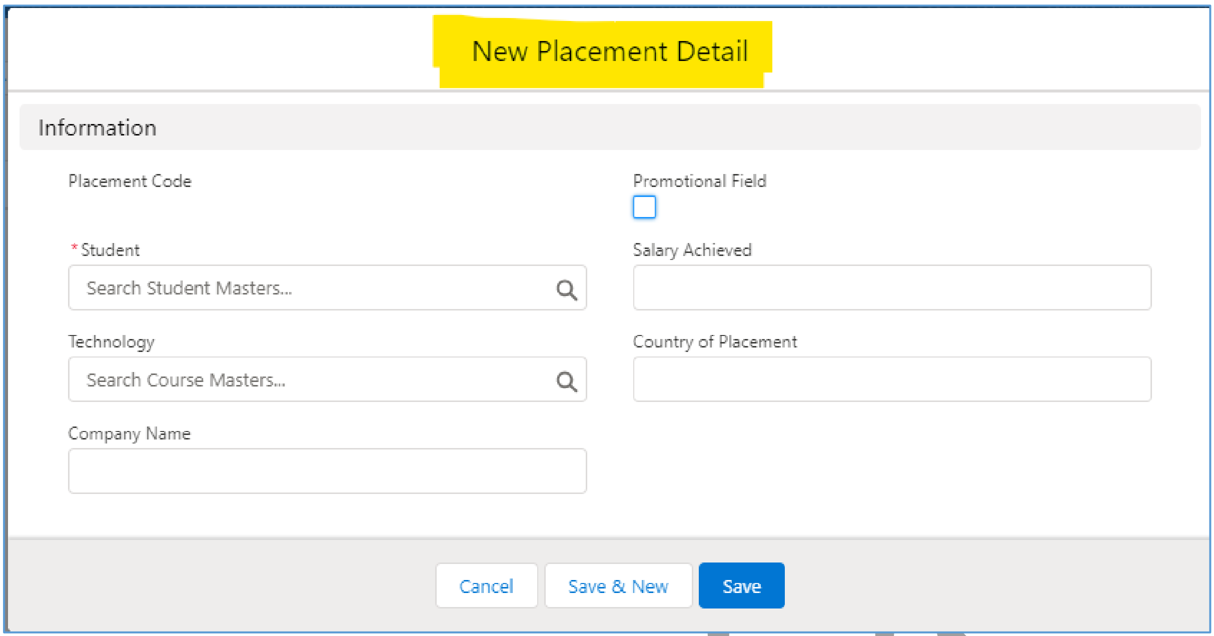
Sr No.	Field Name	Field Type	Field Values(If Present)
1.	Deal Code	Standard Field→ Name →AutoNumber	
2.	Course	Master-Detail to (Course Master)	
3.	Trainer Appointed	Lookup to (Trainer Master)	

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)



5. Object Name : Placement Details

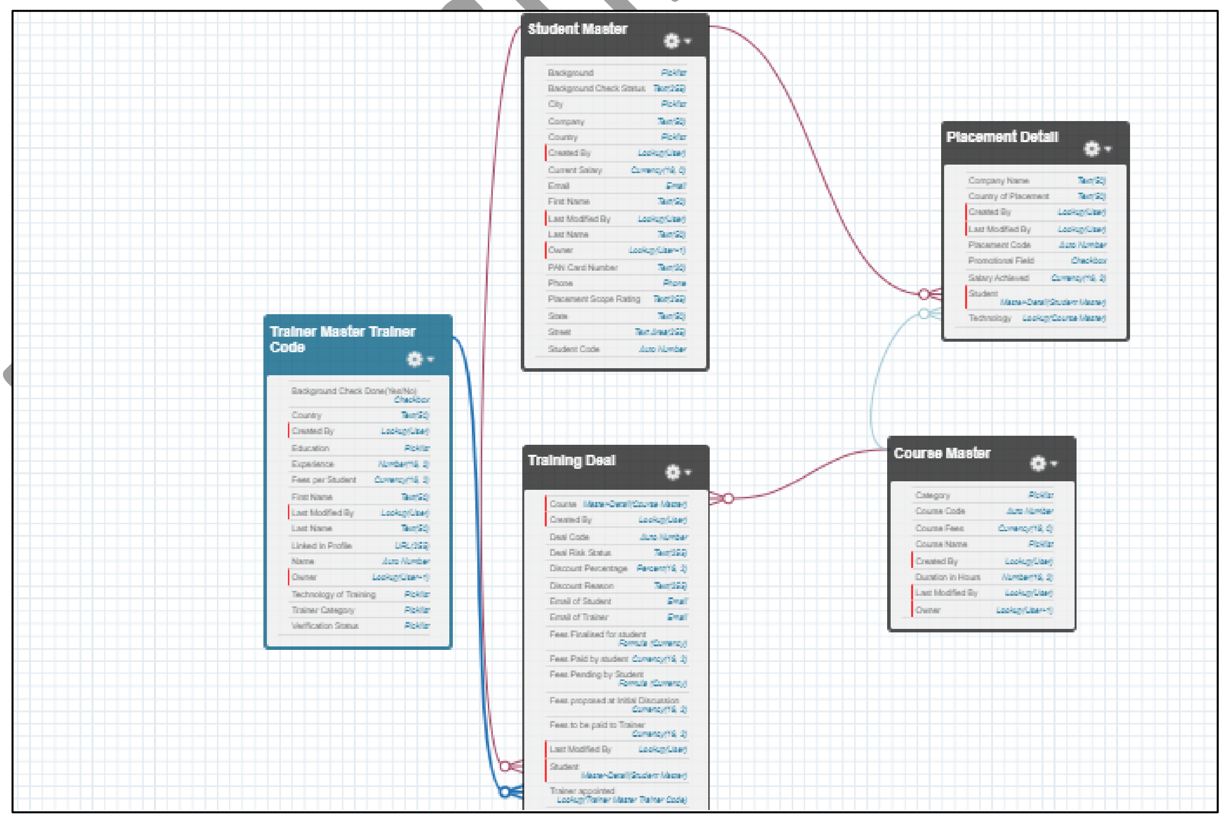
Sr No.	Field Name	Field Type	Field Values(If Present)
1.	Placement Code	Standard Field→ Name →AutoNumber	
2.	Student	Master-Detail to (Student Master)	
3.	Technology	Lookup to (Course Master)	
4.	Company Name	Text	
5.	Country of Placement	Picklist	
6.	Salary Achieved	Currency	
7.	Promotional Field	Checkbox	


New Placement Detail
Information
Placement Code
Promotional Field
* Student
Search Student Masters...
Salary Achieved
Technology
Search Course Masters...
Country of Placement
Company Name
Cancel
Save & New
Save

(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



(3).Roles:

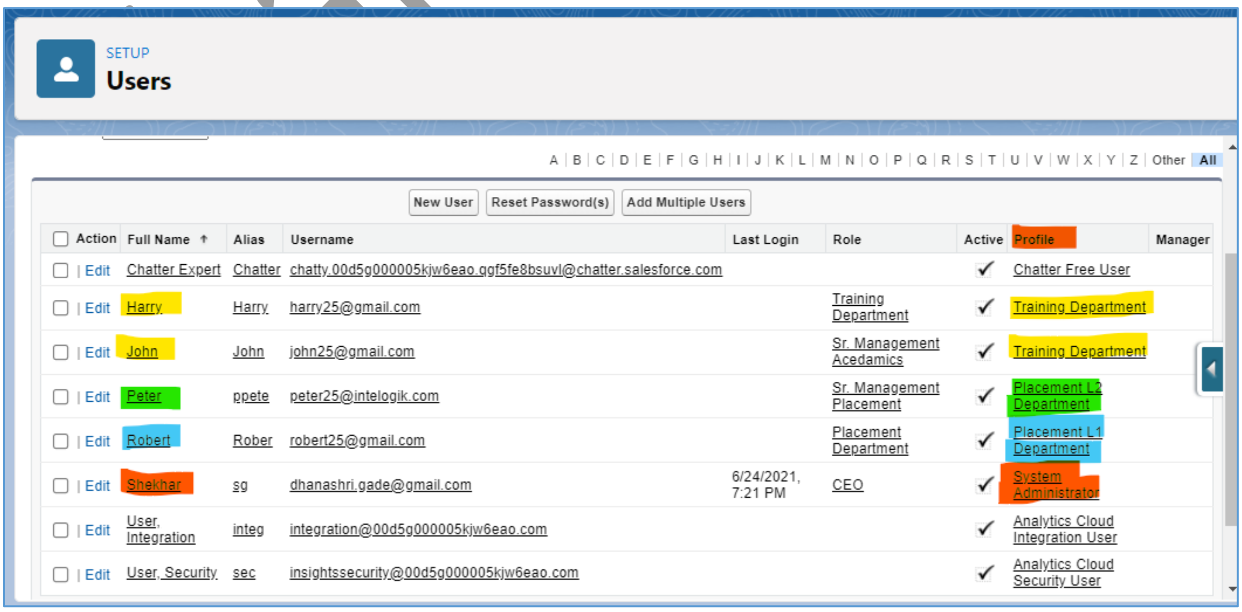
Create new roles and Assign users to Roles.

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:

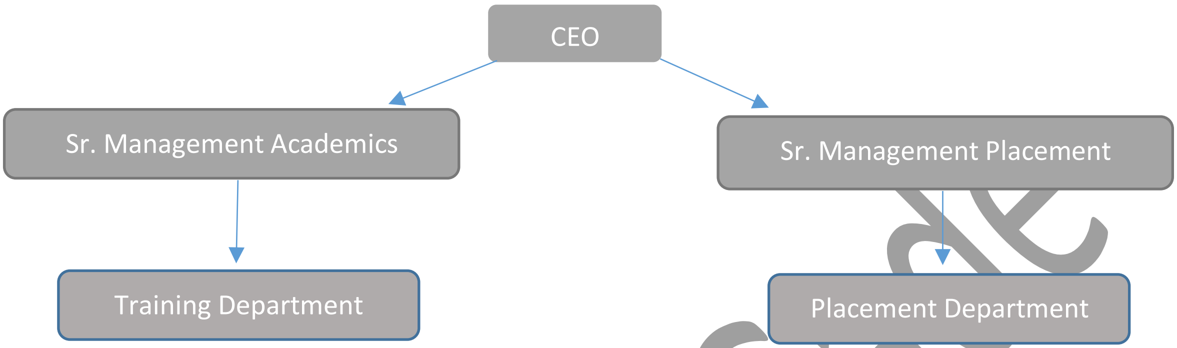
Create Profiles for different Departments and assign users.

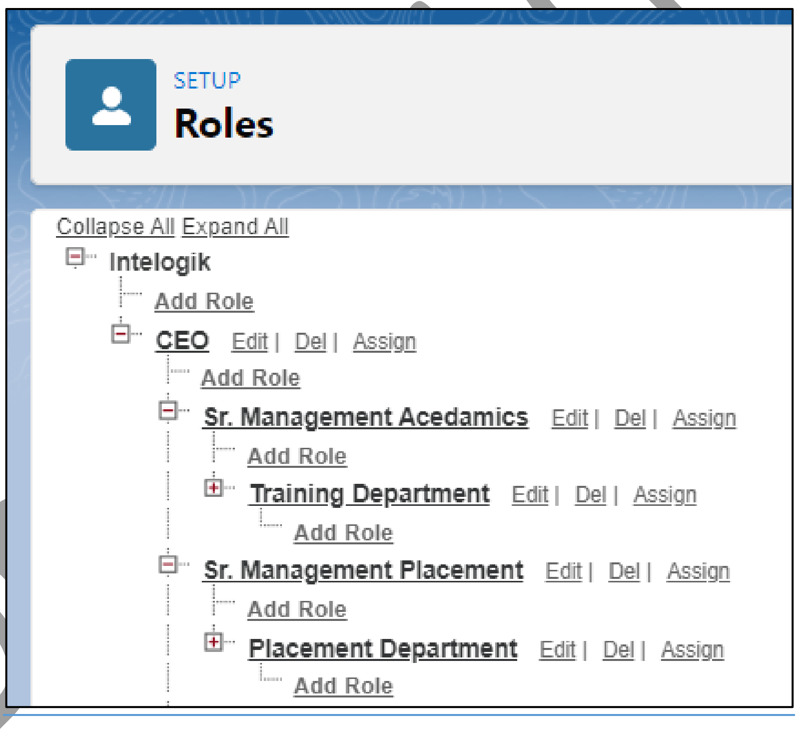
Sr No.	Profile	User Assigned
1.	Training Department	Harry, John
2.	Placement L2 Department	Peter
3.	Placement L1 Department	Robert
4.	Management Department(System Administrator)	Shekhar



(5)Role Hierarchy:

Create Hierarchy in Roles as per Business Process.



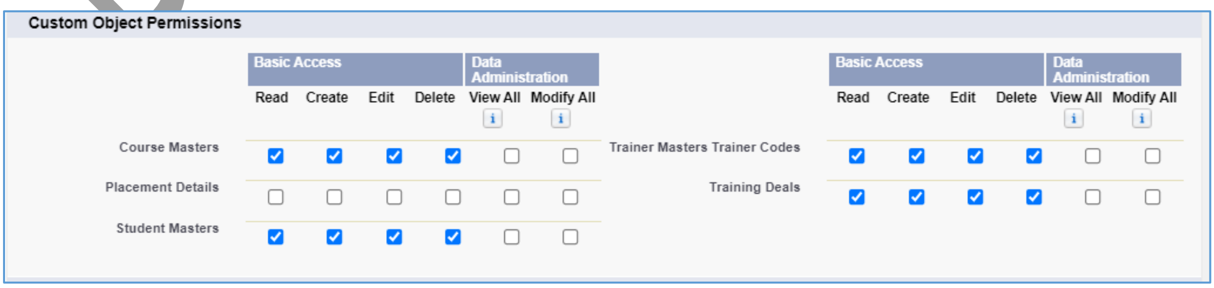


(6). Object Access for Profile:

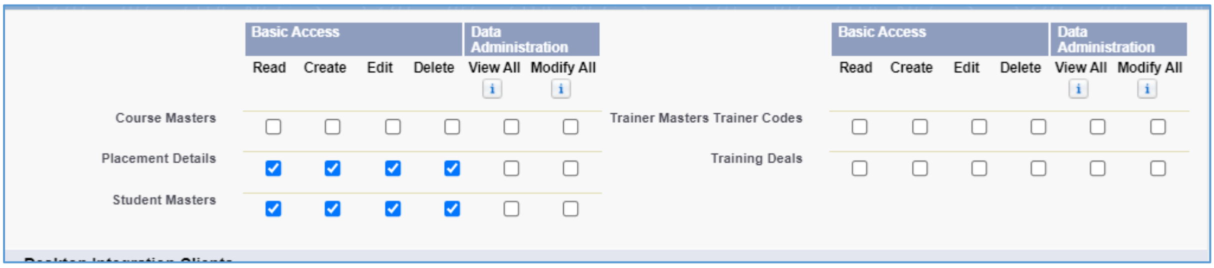
Give Access to all users through profiles.

Objects / User	Student Master	Course Master	Trainer Master Trainer Code	Training Deal	Placement Details
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	CRED, View All , Modify All	CRED, View All , Modify All	CRED, View All , Modify All	CRED, View All , Modify All

1) Training Department(Harry) :

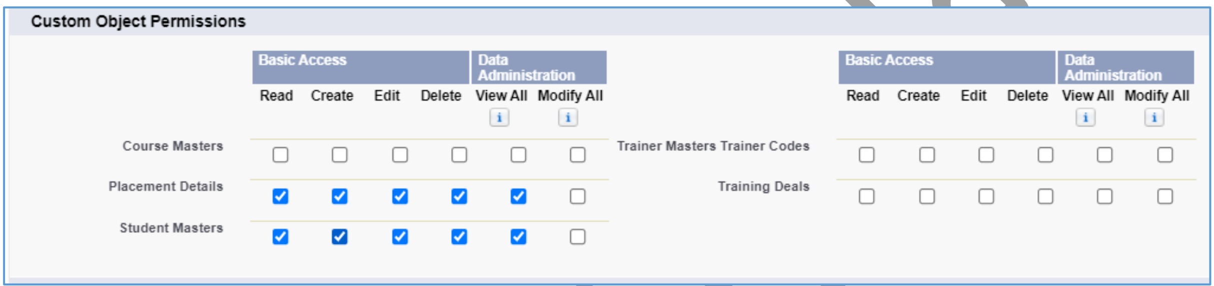


2) Placement L1 Department(Robert) :



	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Course Masters	☐	☐	☐	☐	☐	☐
Placement Details	☑	☑	☑	☑	☐	☐
Student Masters	☑	☑	☑	☑	☐	☐
Trainer Masters Trainer Codes	☐	☐	☐	☐	☐	☐
Training Deals	☐	☐	☐	☐	☐	☐

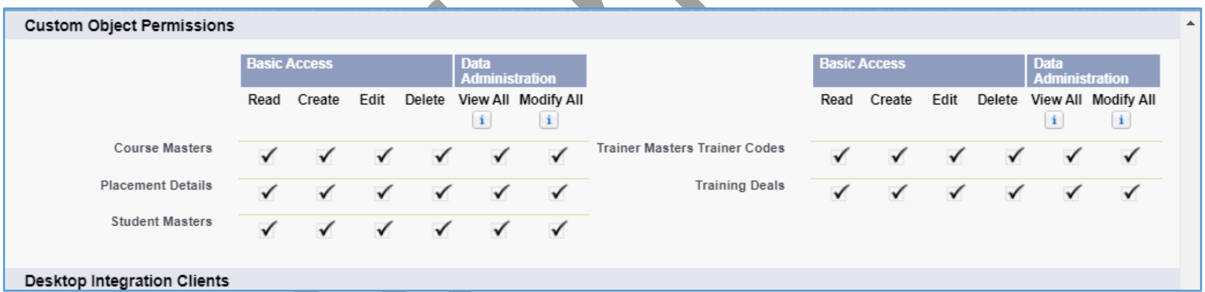
3) Placement L2 Department(Peter) :



Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Course Masters	☐	☐	☐	☐	☐	☐
Placement Details	☑	☑	☑	☑	☑	☐
Student Masters	☑	☑	☑	☑	☑	☐
Trainer Masters Trainer Codes	☐	☐	☐	☐	☐	☐
Training Deals	☐	☐	☐	☐	☐	☐

4) System Administrator (Shekhar)Access:



Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Course Masters	✓	✓	✓	✓	✓	✓
Placement Details	✓	✓	✓	✓	✓	✓
Student Masters	✓	✓	✓	✓	✓	✓
Trainer Masters Trainer Codes	✓	✓	✓	✓	✓	✓
Training Deals	✓	✓	✓	✓	✓	✓

Desktop Integration Clients

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.

Assigned Users

Training Department Profile(View all Access to John)

« Back to: Permission Set

Help for this Page

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

Add Assignments | Remove Assignments

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager	Expires On
Edit	John	John	john25@gmail.com		Sr. Management Acedamics	✓	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 Trainer Codes	Read, Create, Edit, Delete, View All	15	--
Training Deals	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.

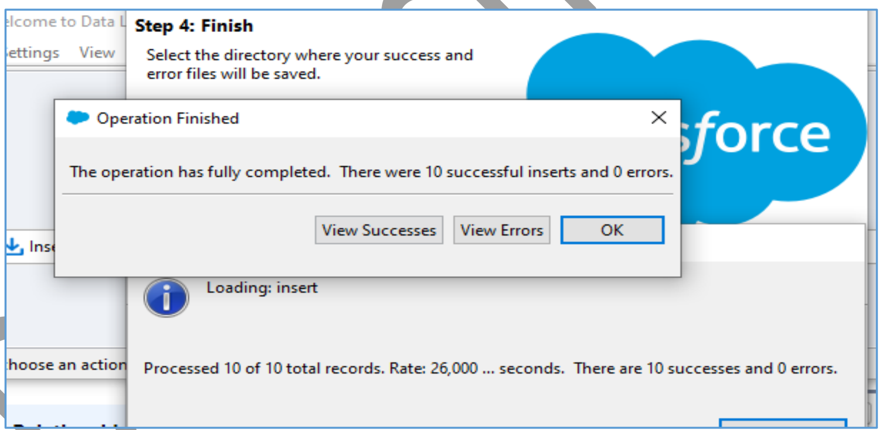
Client has provided data file with few records as of now. As per need data can be added in future.

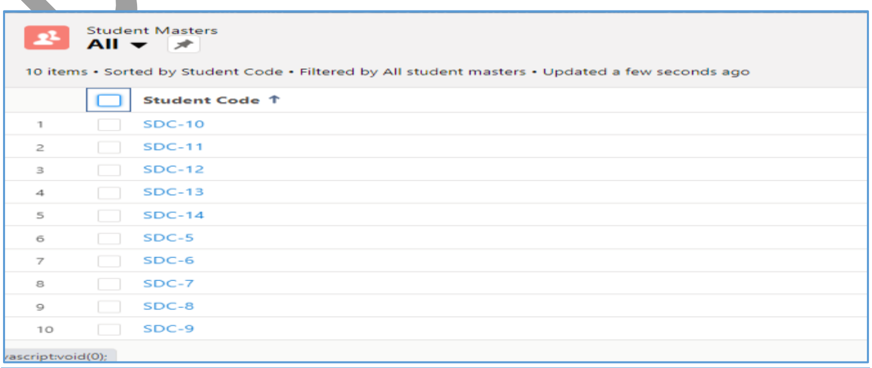
Business Problems:

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

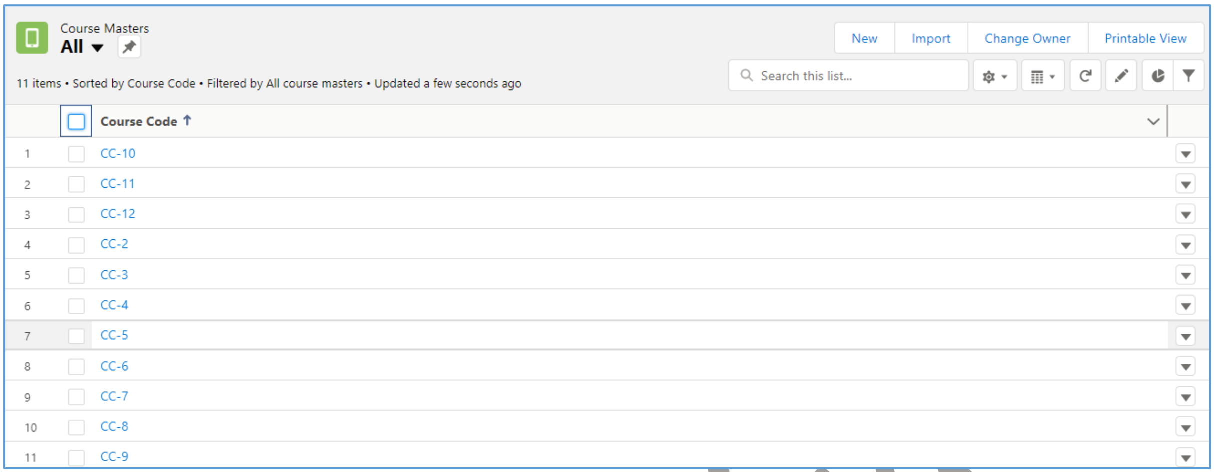
Right now no data is present to take backup.

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

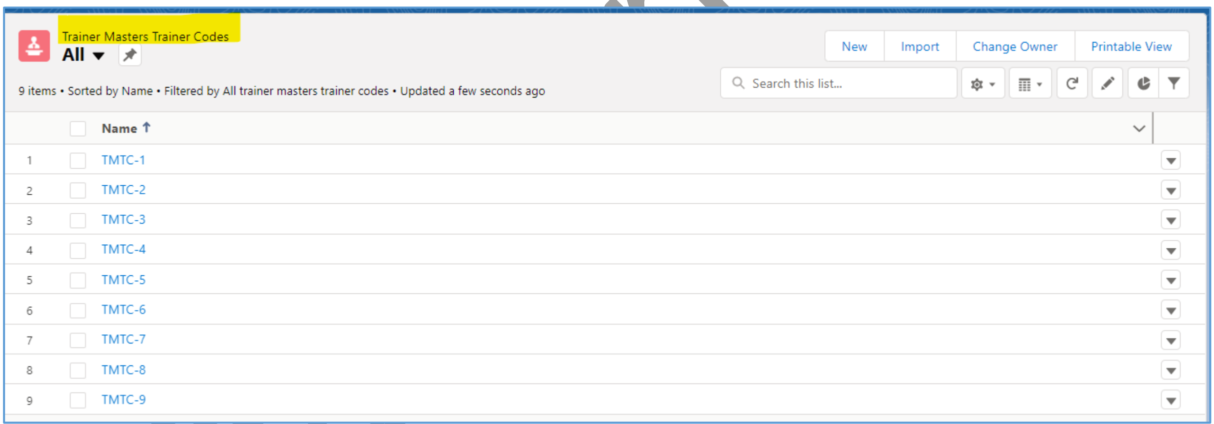




(3) Load data in ‘Course Master’ using .CSV file given by client.



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

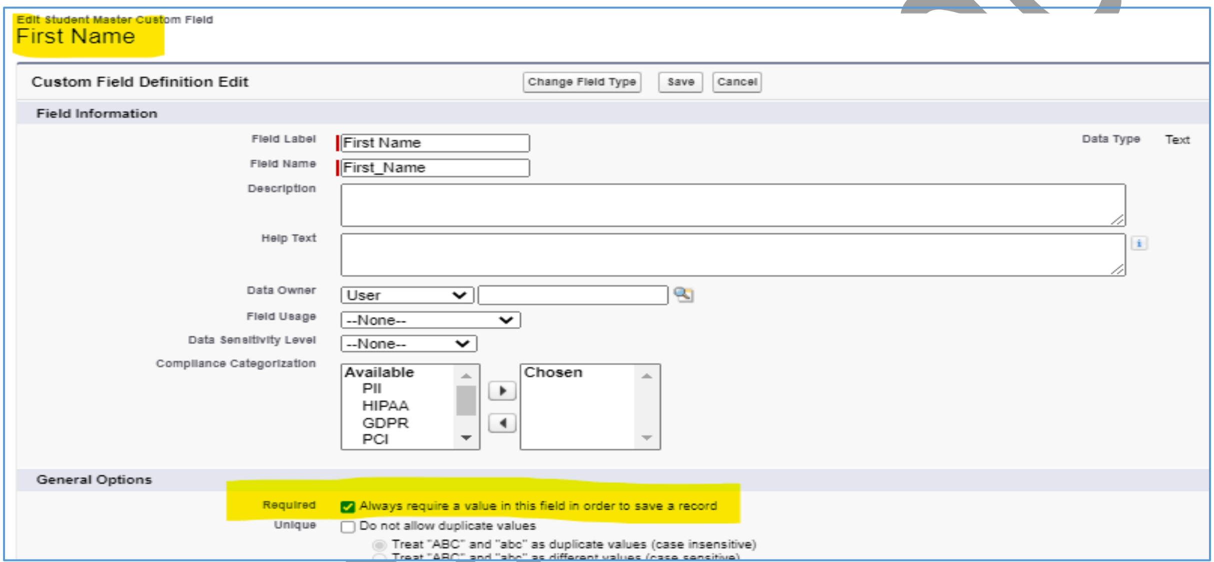


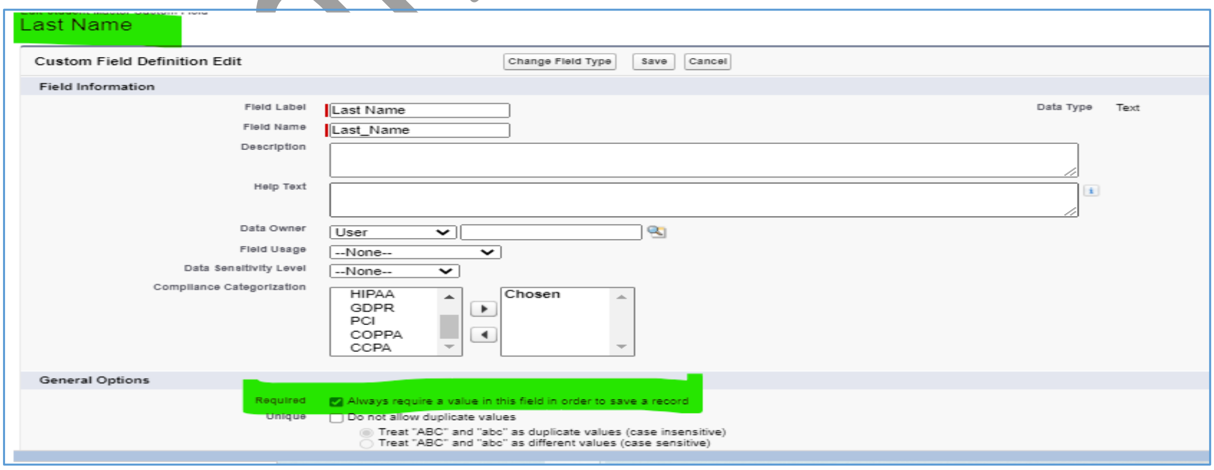
PROJECT WORK: STORY 5

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.



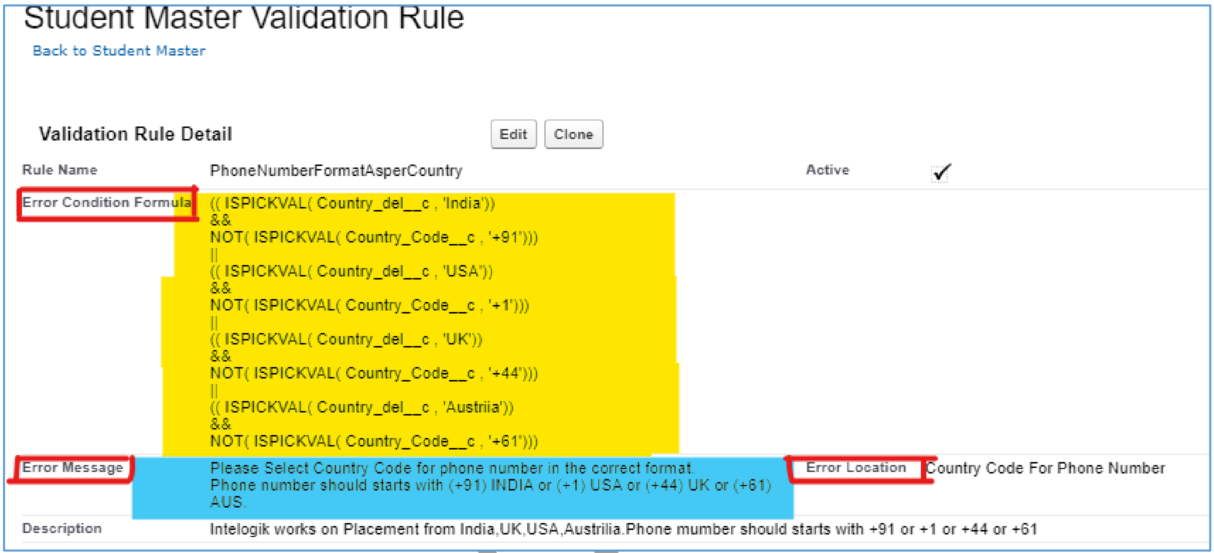


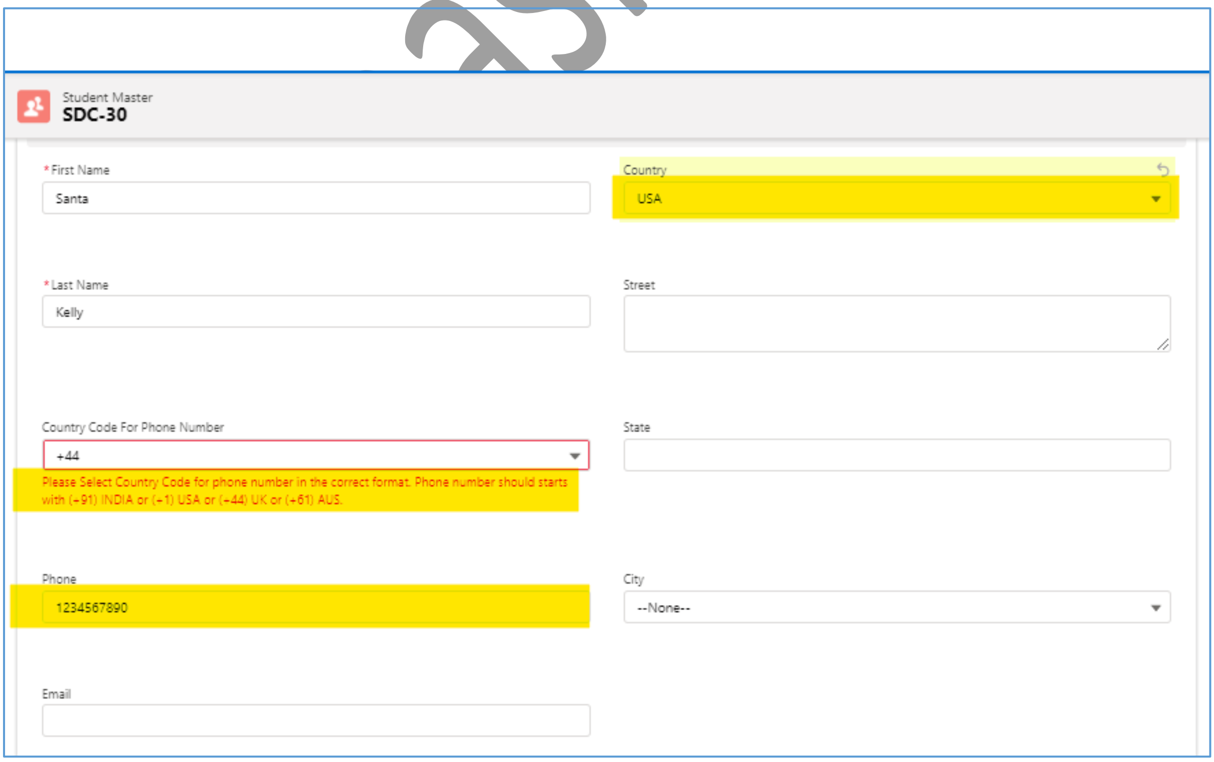
(2).Client wants phone number should starts with +91,+1,+44,+61 for India, USA, UK and Australia.

Create new picklist field: Country Code For Phone Number

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

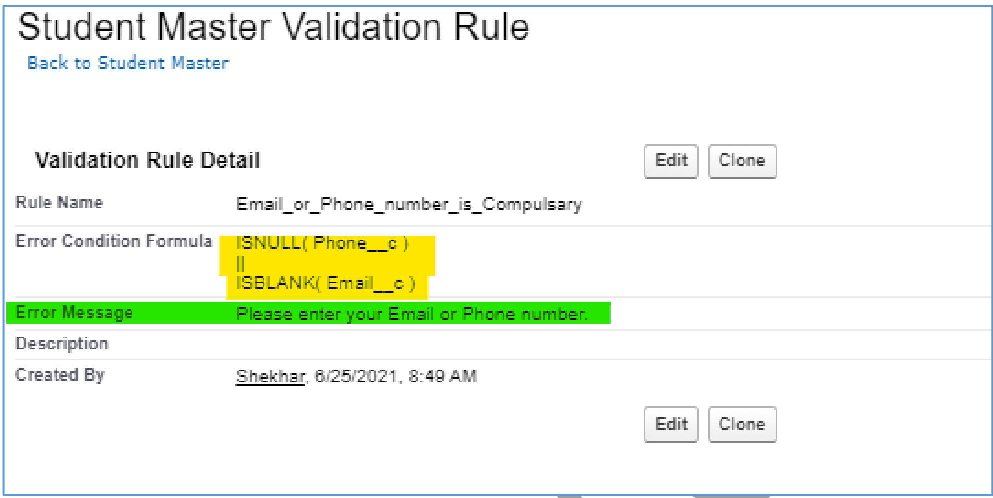
Create Validation rule.

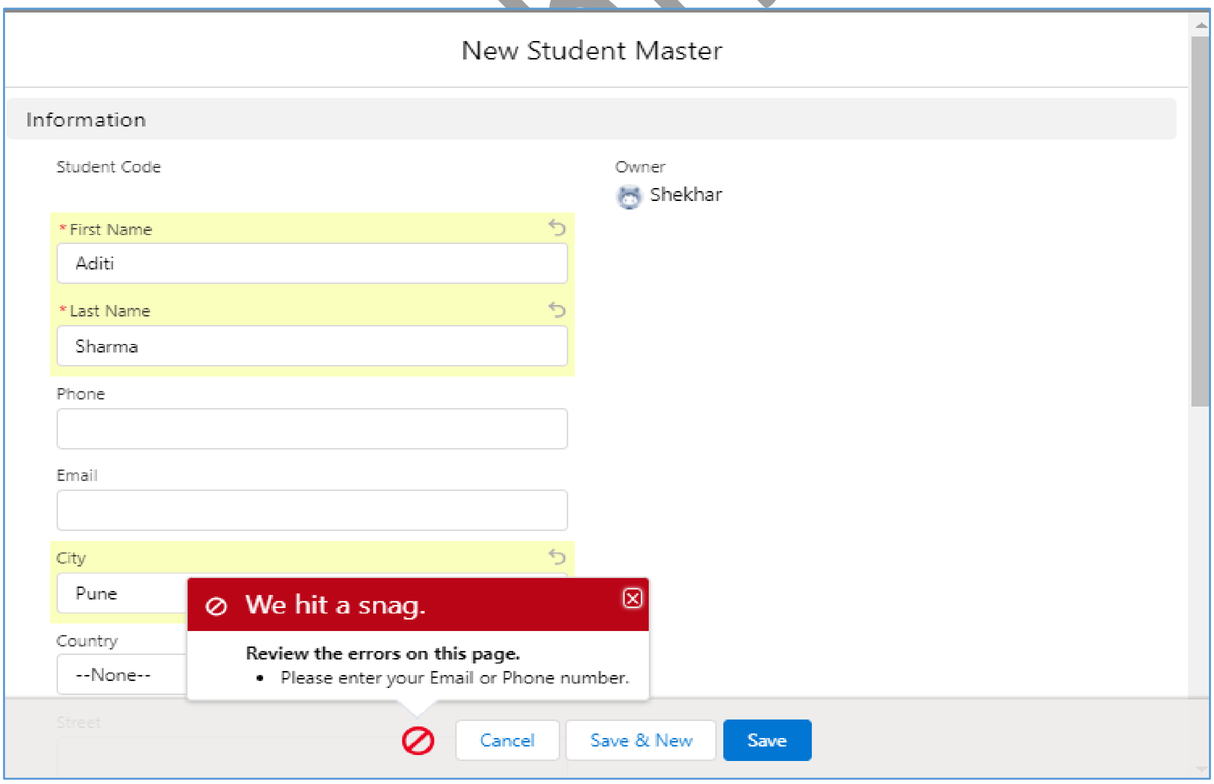




(3).One thing is mandatory either Email or Phone. Keeping both blank is not allowed.

Create Validation rule.



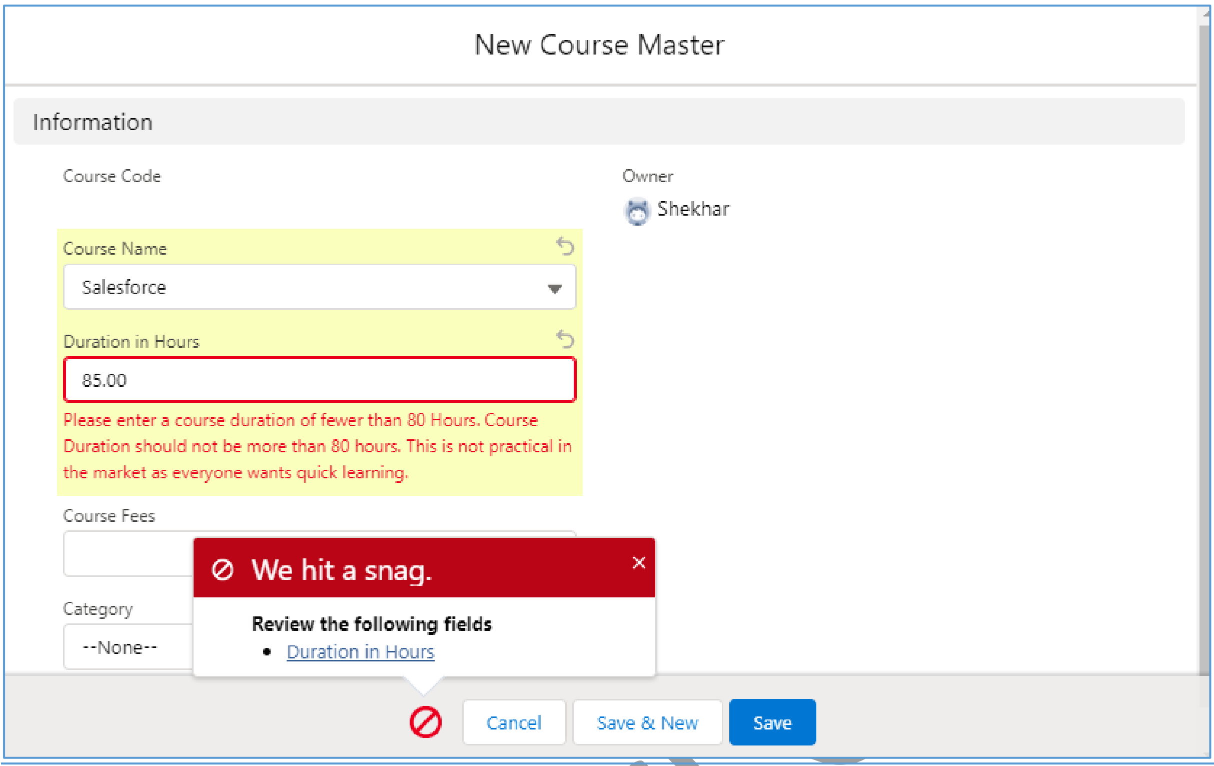


PROJECT WORK: STORY 6

Data Cleaning Process: Course Master

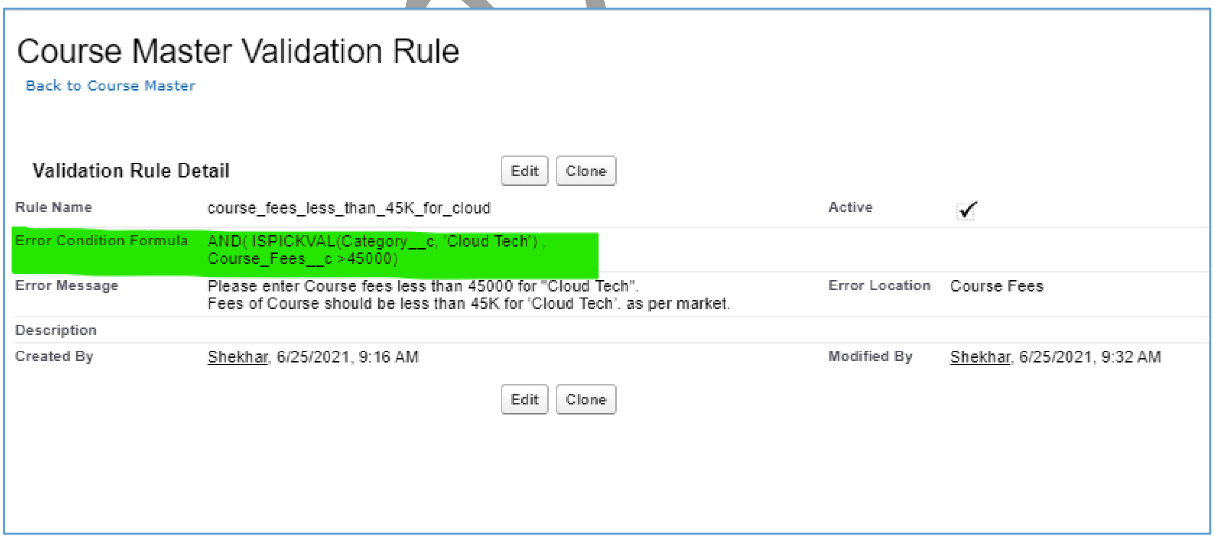
(1).No course should have Duration more than 80 hours.

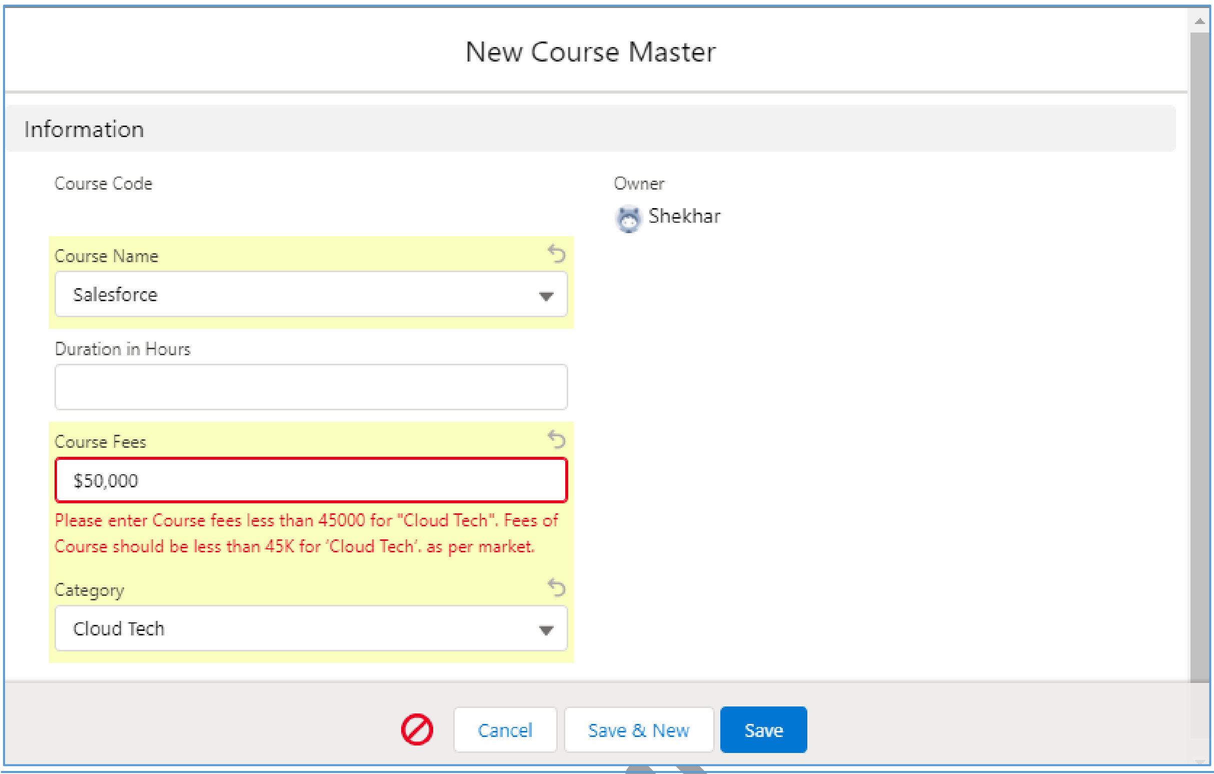
Create validation rule as shown below.



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

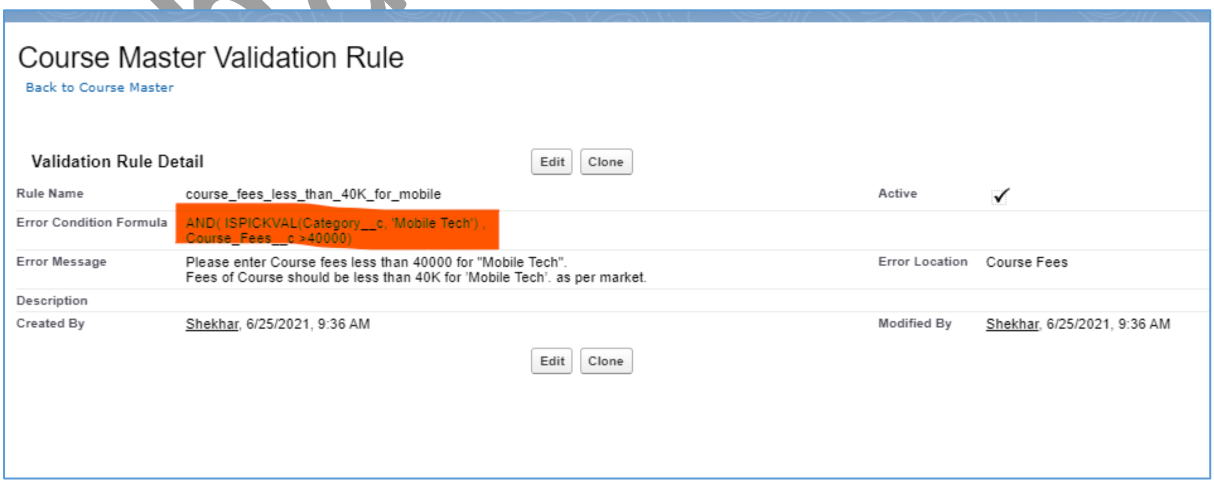
Create validation rule as shown below.

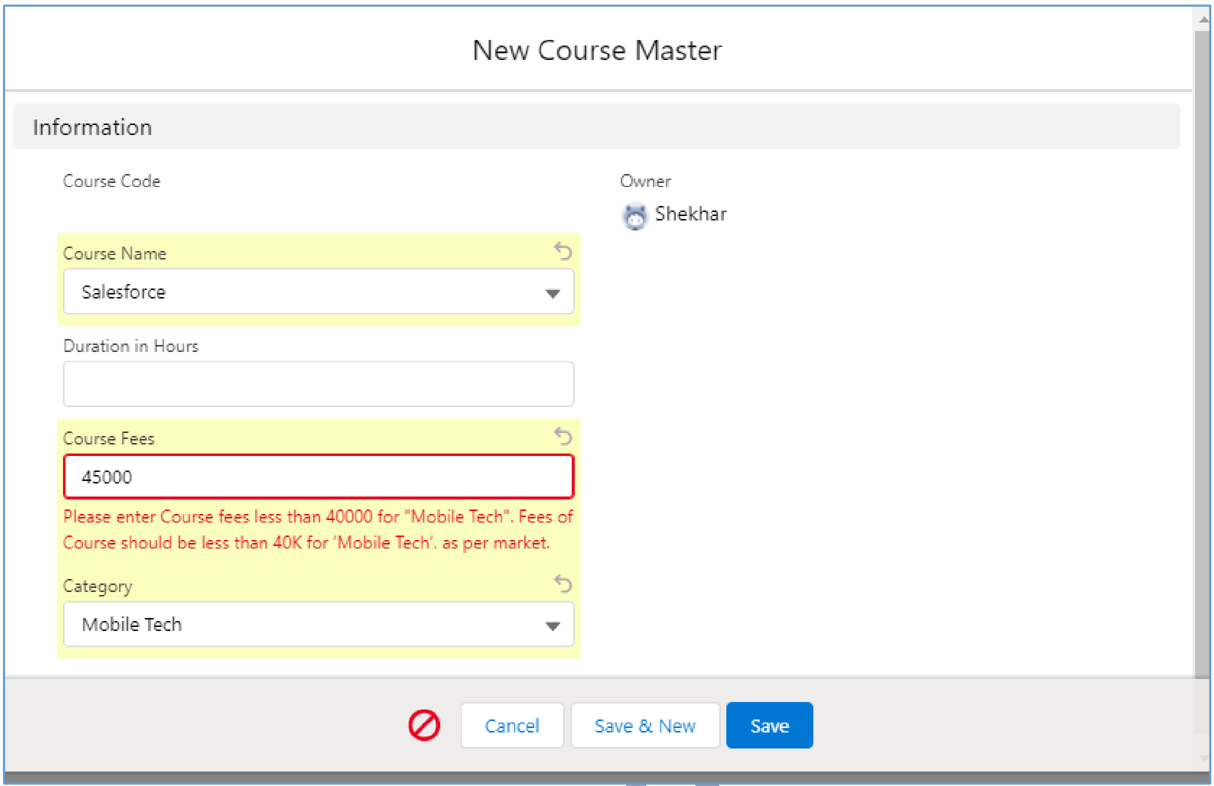




(3).Fees of Course should be less than 40K for 'Mobile Tech'.

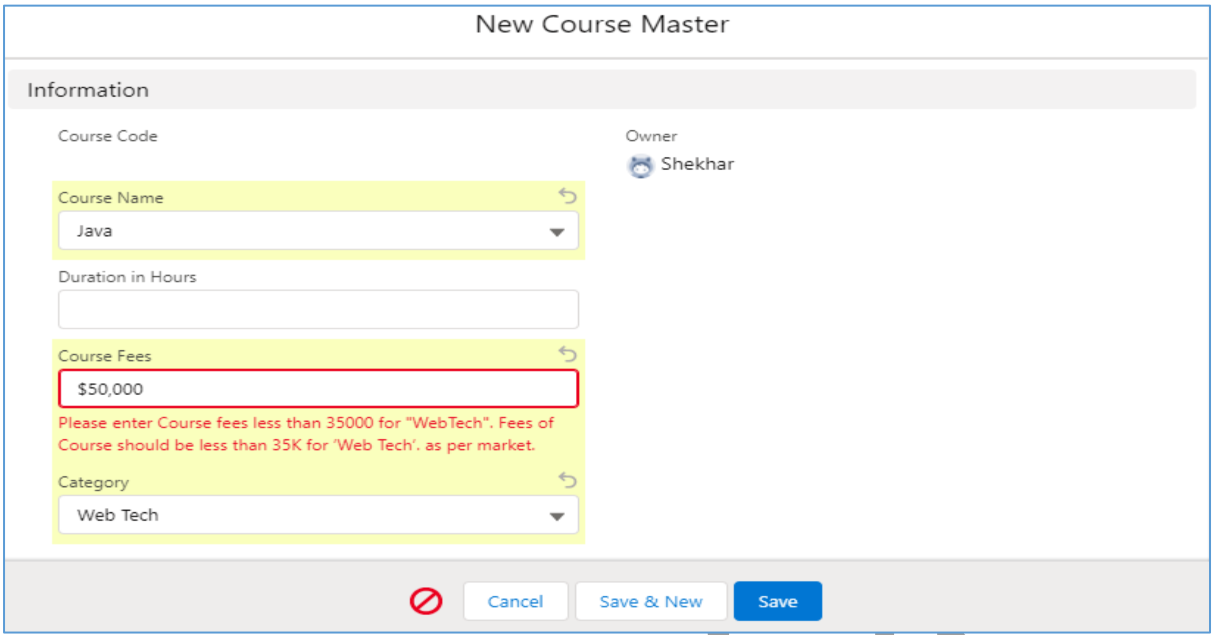
Create validation rule as shown below.





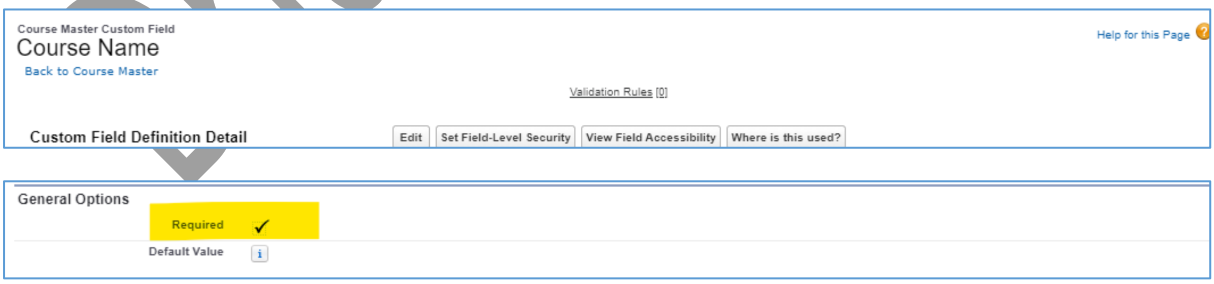
(4).Fees of Course should be less than 35K for 'Web Tech'.

Create validation rule as shown below.

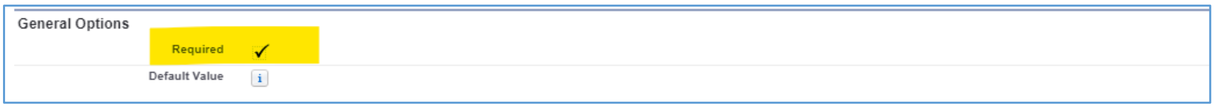


(5).Course Name, Fees, Duration, and Category are mandatory.

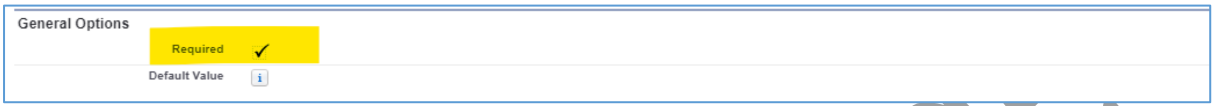
- Course Name is 'Required'.



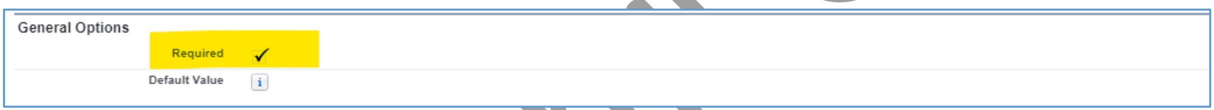
- Course Fees is 'Required'.



- Duration in Hours is ‘Required’.



- Category is ‘Required’.

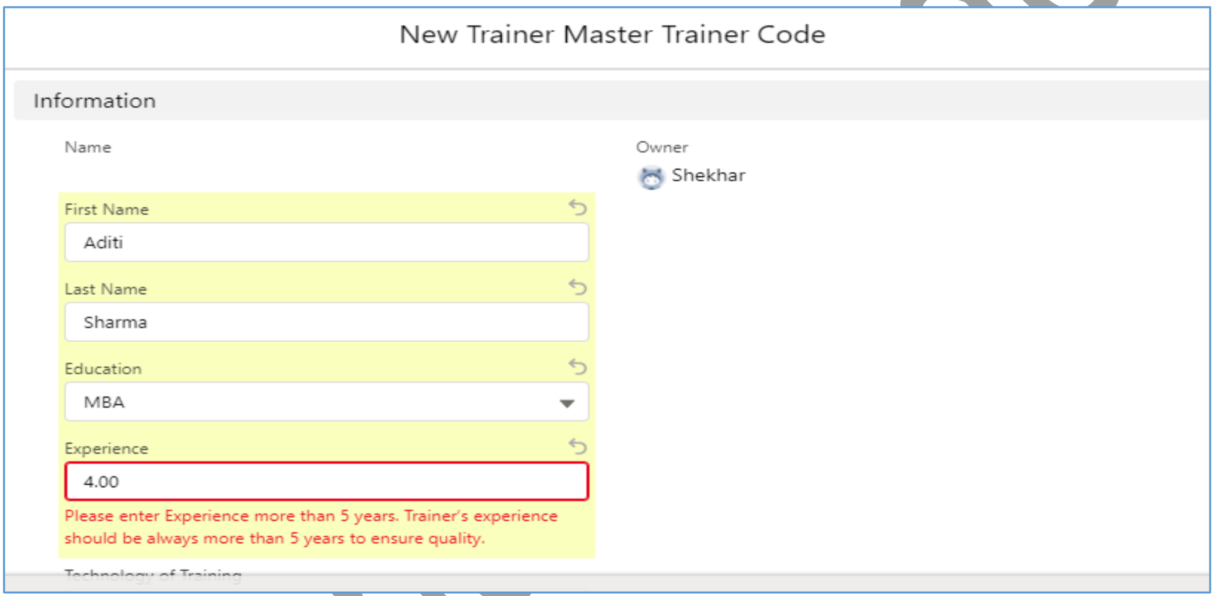


PROJECT WORK: STORY 7

Data Cleaning Process: Trainer Master

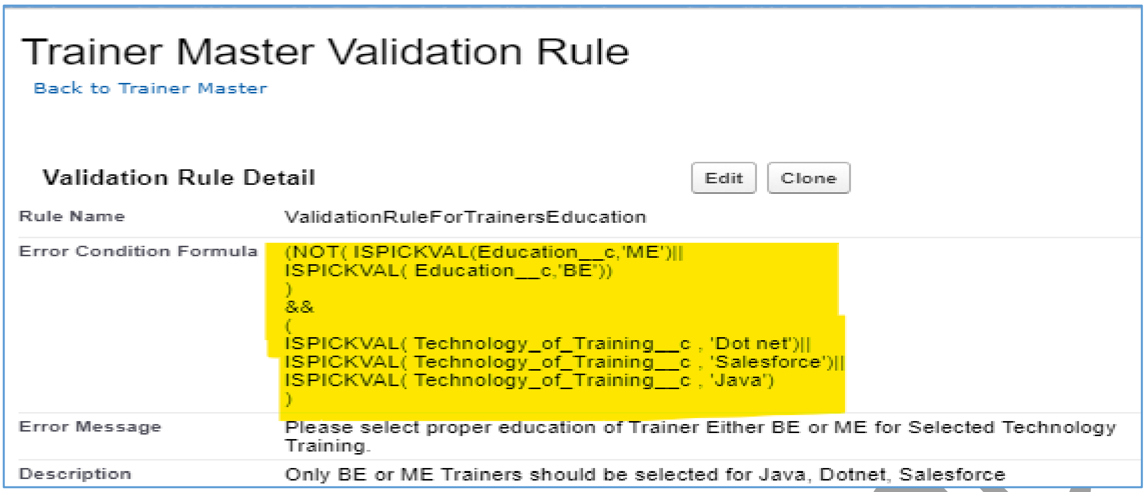
(1).Trainer’s experience should be always more than 5 years.

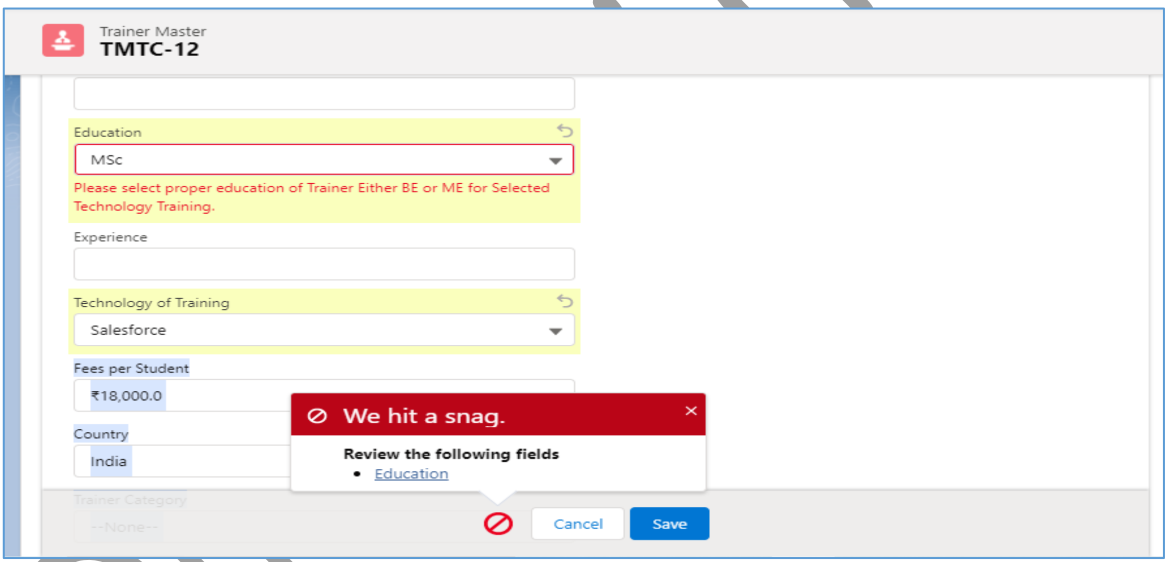
Create Validation rule.



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

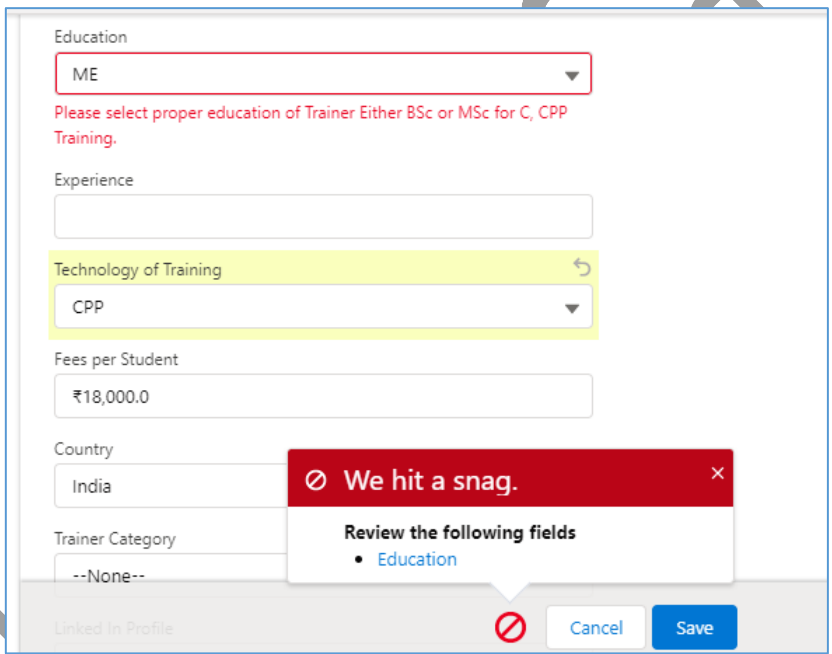
Create Validation rule.





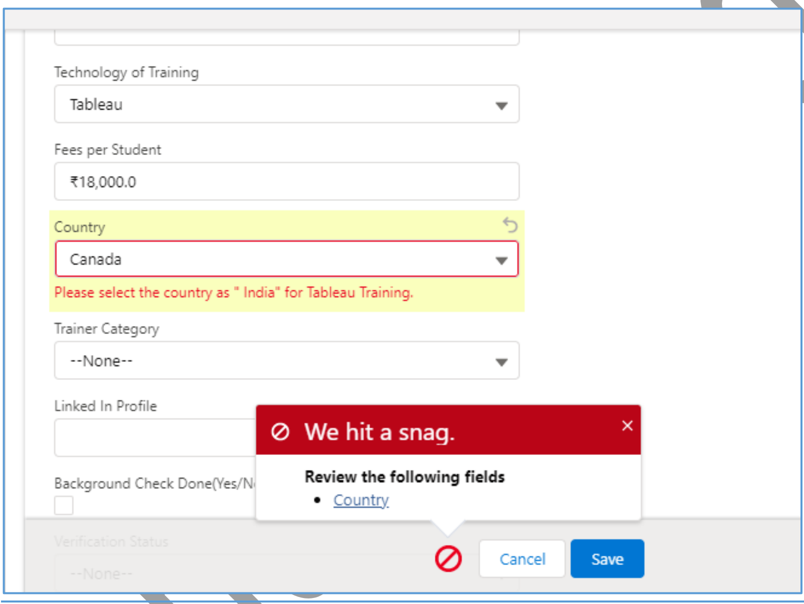
(3). Only BSc or MSc Trainers are allowed for C and CPP.

Create Validation rule.



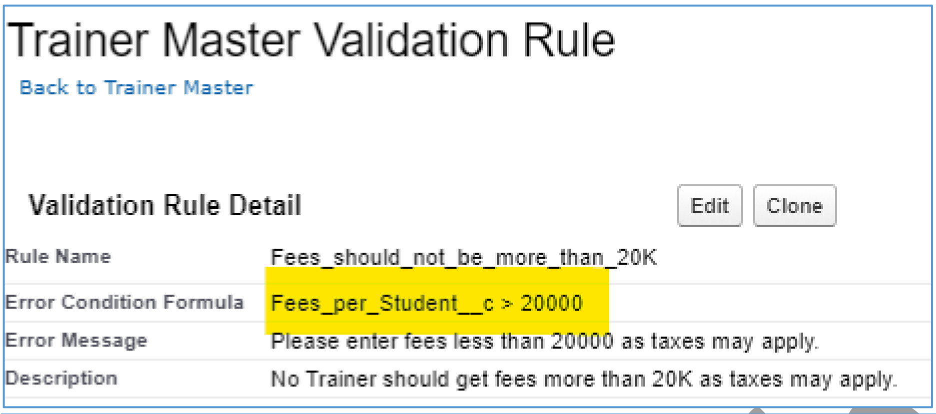
[(4).Only Indian Trainers are allowed for 'Tableau' Training.]

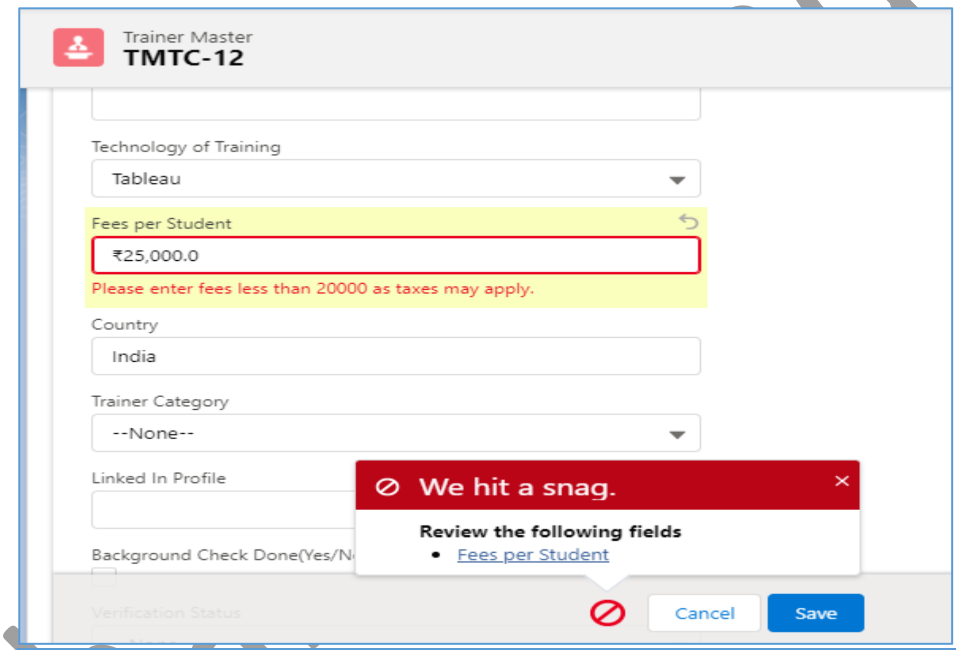
Create Validation rule.



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

Create Validation rule.



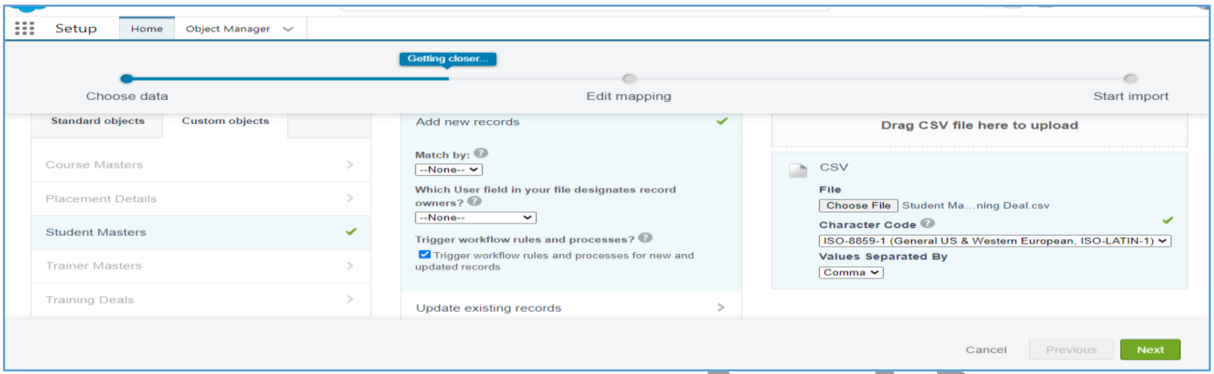


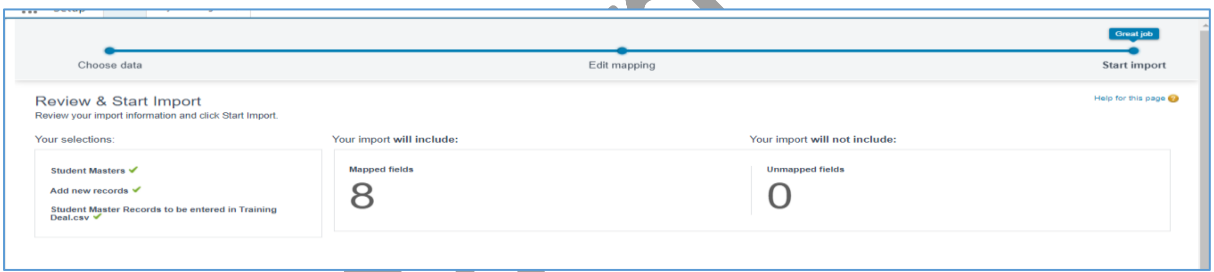
PROJECT WORK: STORY 8

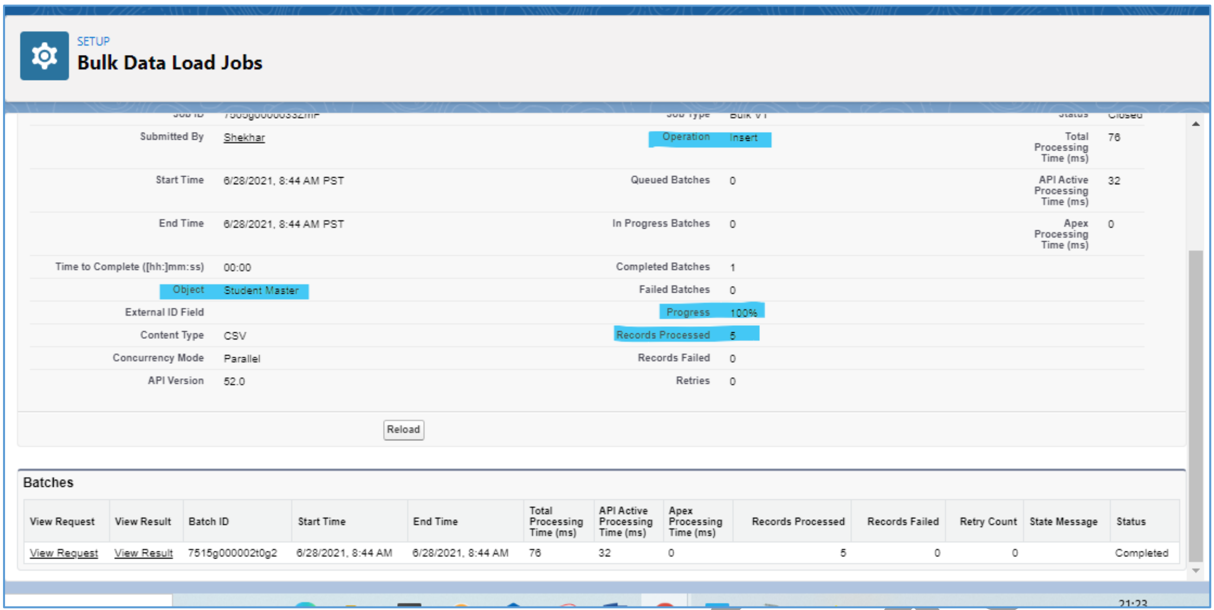
Client gave us Data of Students who wants to enrol in Email.

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.





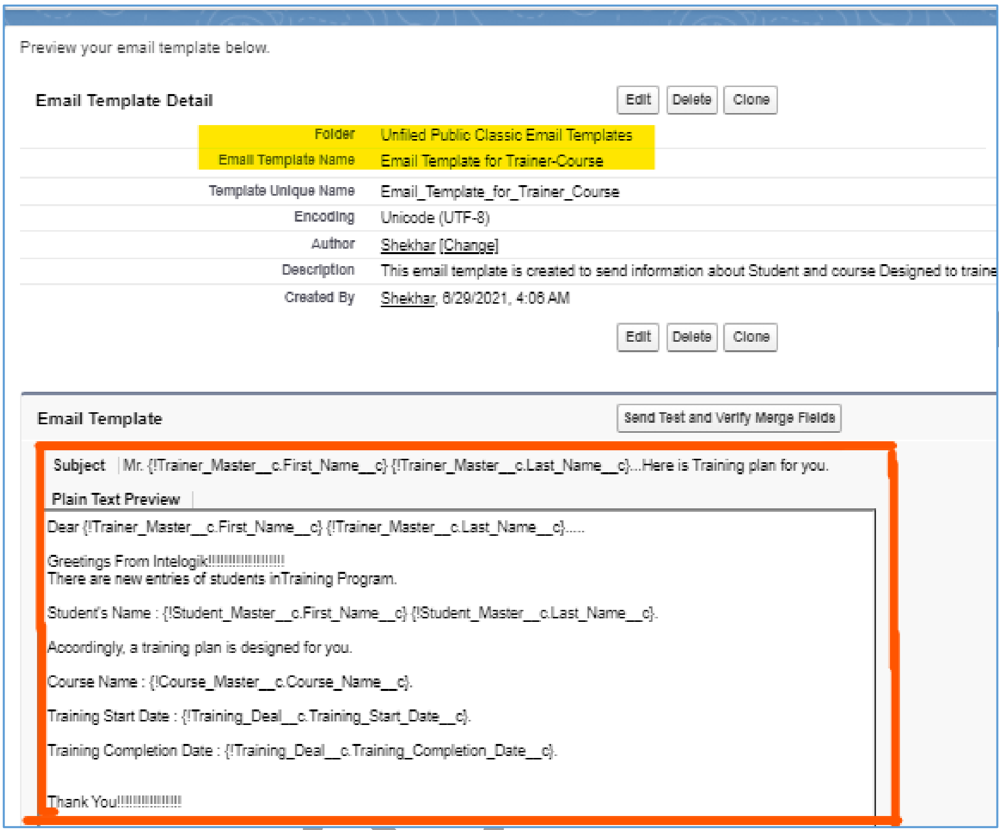


Scope of Improvisation: Training Completion Date should be Formula field which return Date which is (Training Start Date + Duration of Course)

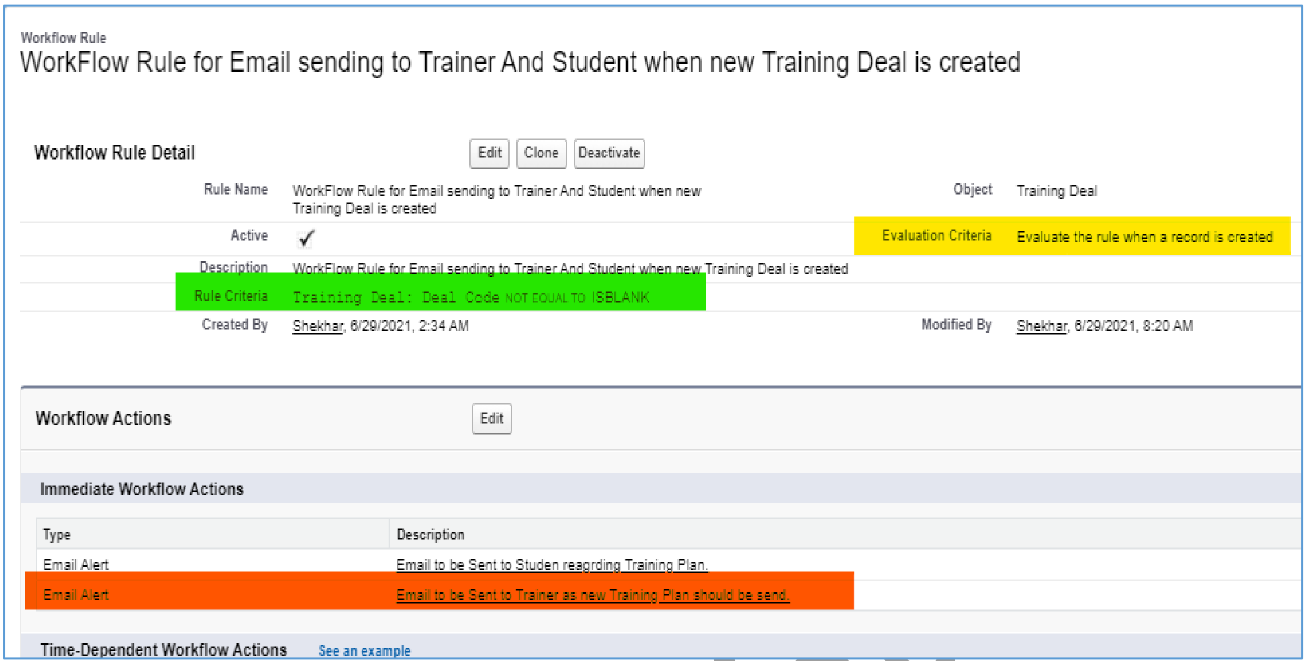
(A).Client wants to send automated Email to ‘Trainer’ when record is created.

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

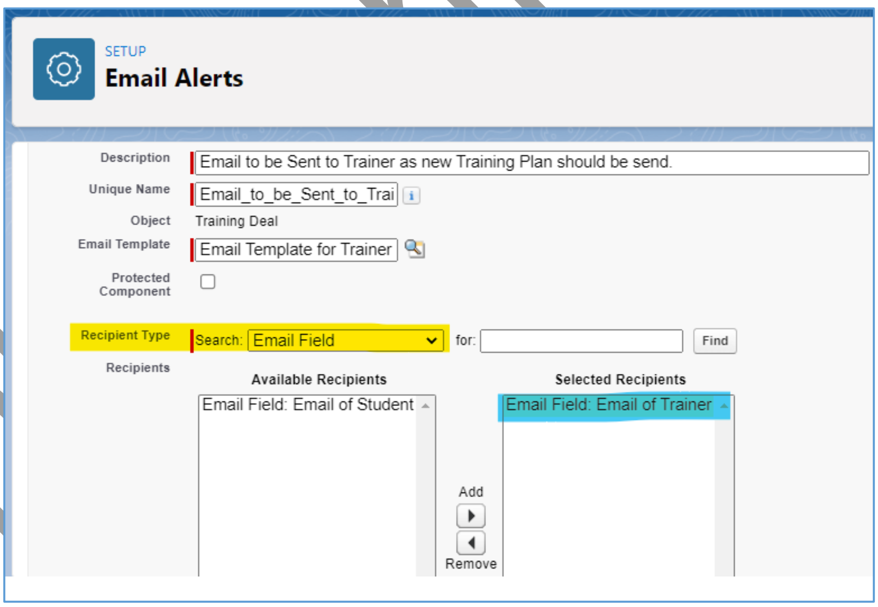
(1).As Email has to send to Student, I need to create “Email Template” in Classic.



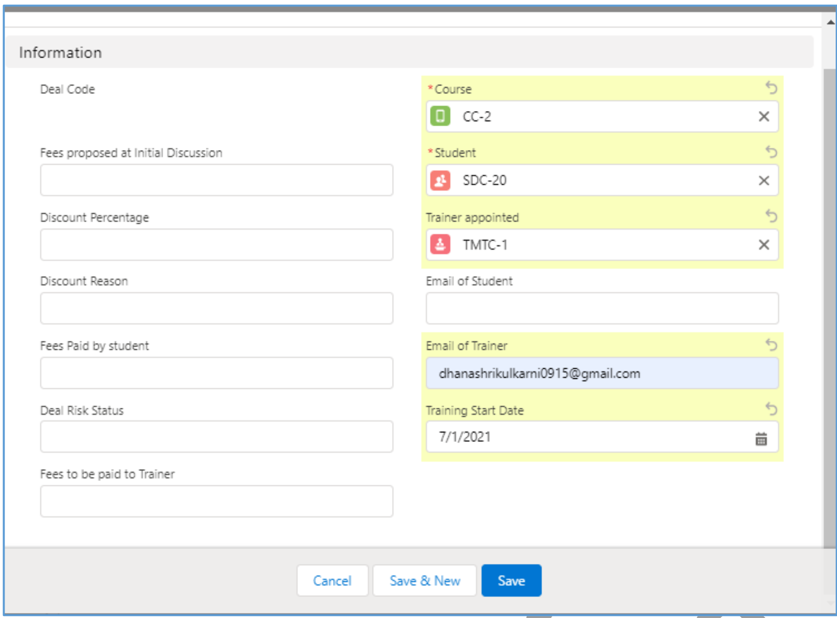
(2).Create Workflow Rule with Evaluation Criteria: Created and Add bare condition i.e Deal Code <> ISBLANK. Activate Workflow Rule.



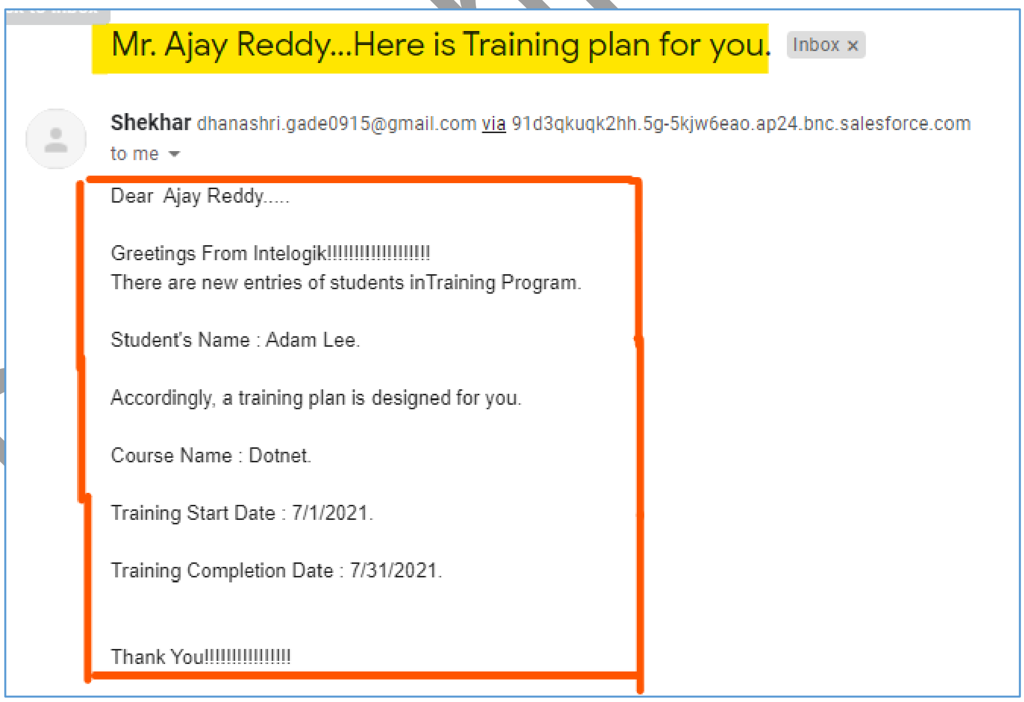
(3). Create Immediate Workflow Action: New Email Alert.



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



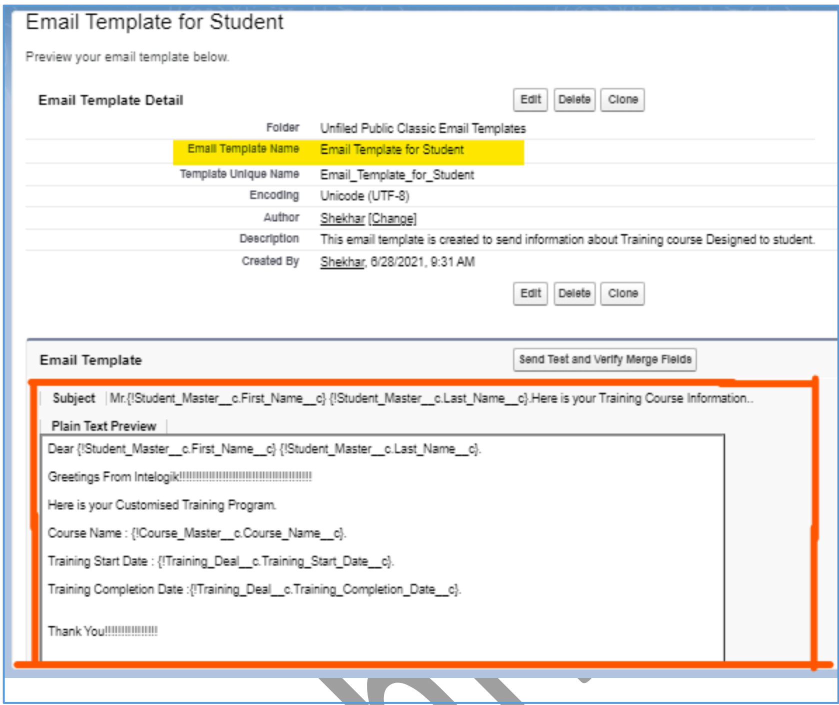
(5).As soon as new Training Deal is created, Immediately Email will be send to trainer regarding 'Training Plan'.



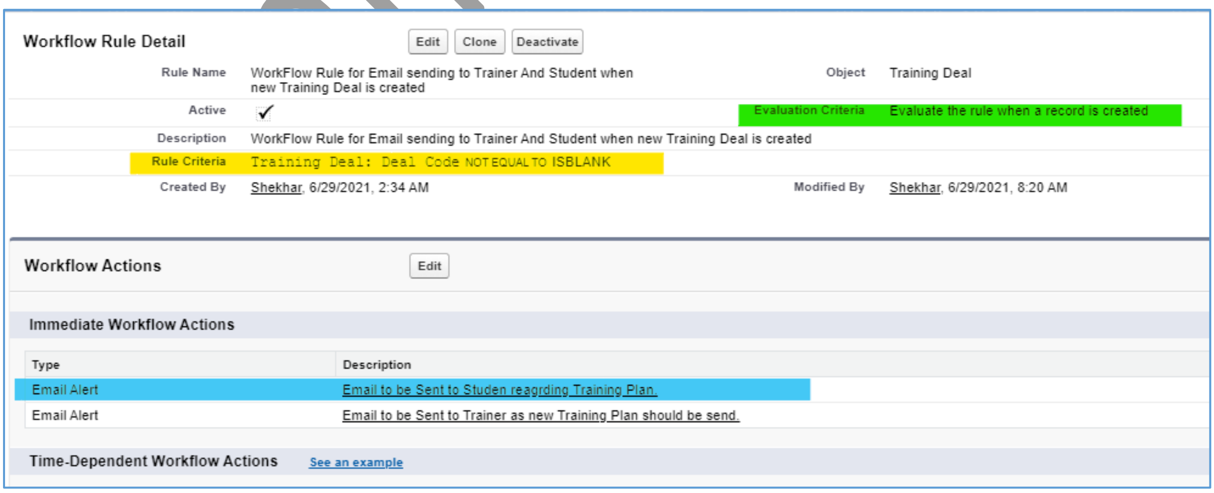
(B).Client wants to send automated Email to 'Student' when new Training Plan is created.

This automated mechanism can be achieved using 'Workflow Rules'.

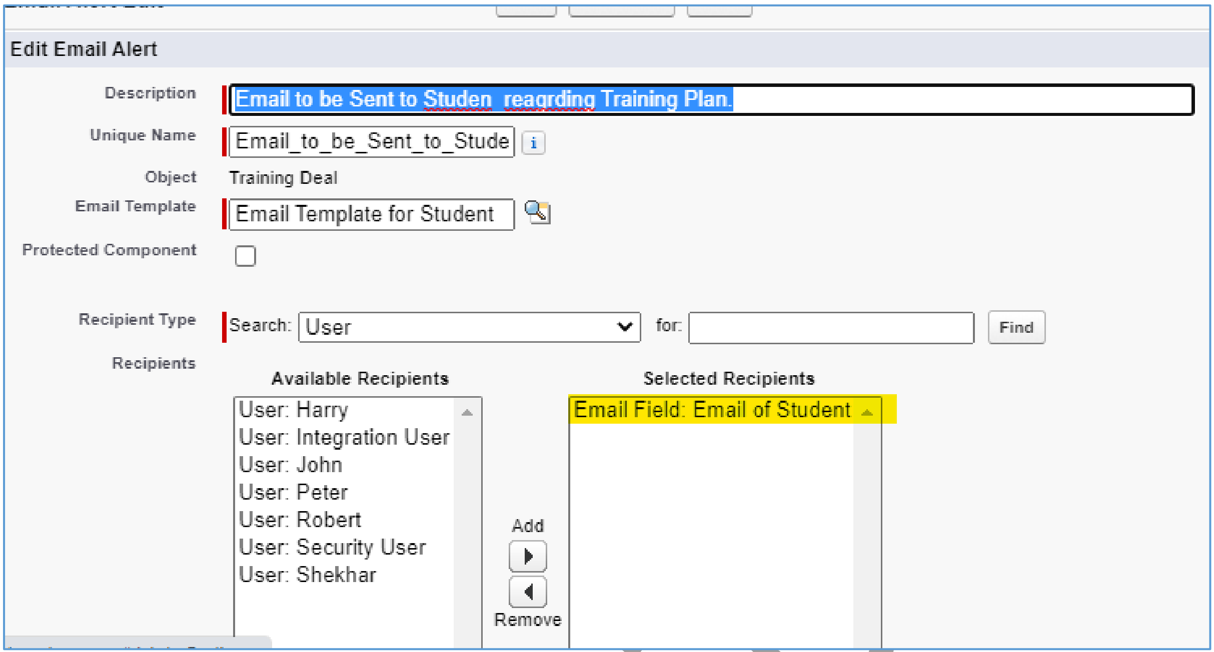
(1).As Email has to send to Student, I need to create "Email Template" in Classic.



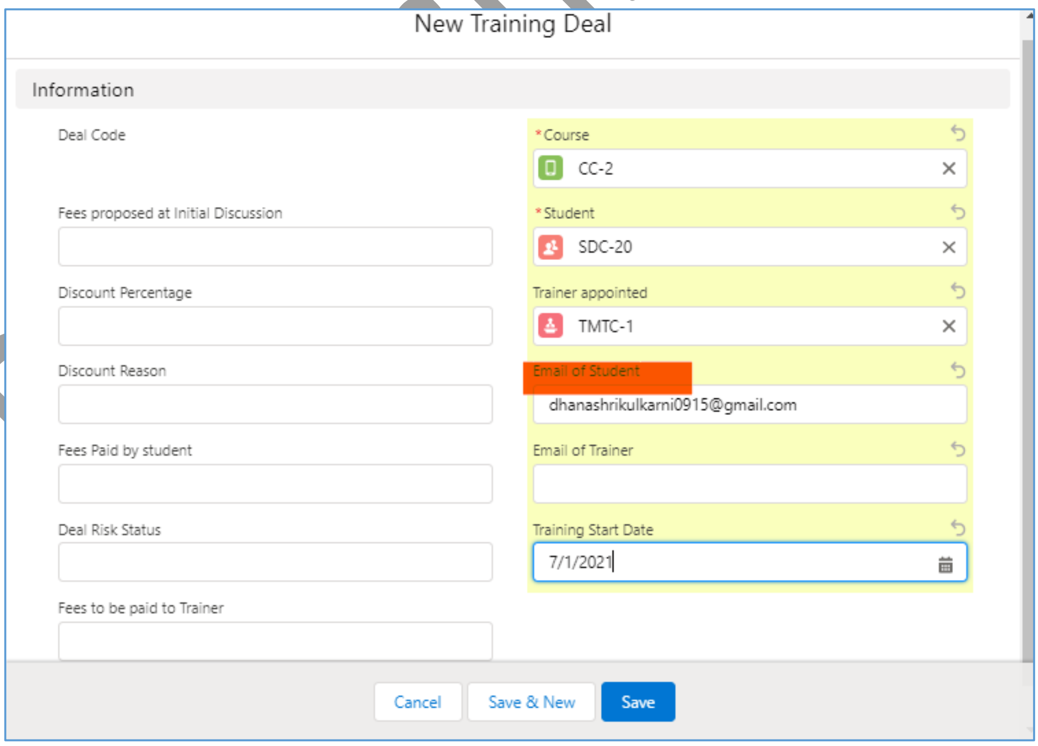
(2).Use previously Created Active Workflow Rule with Evaluation Criteria: Created and Added bare condition i.e Deal Code <> ISBLANK.



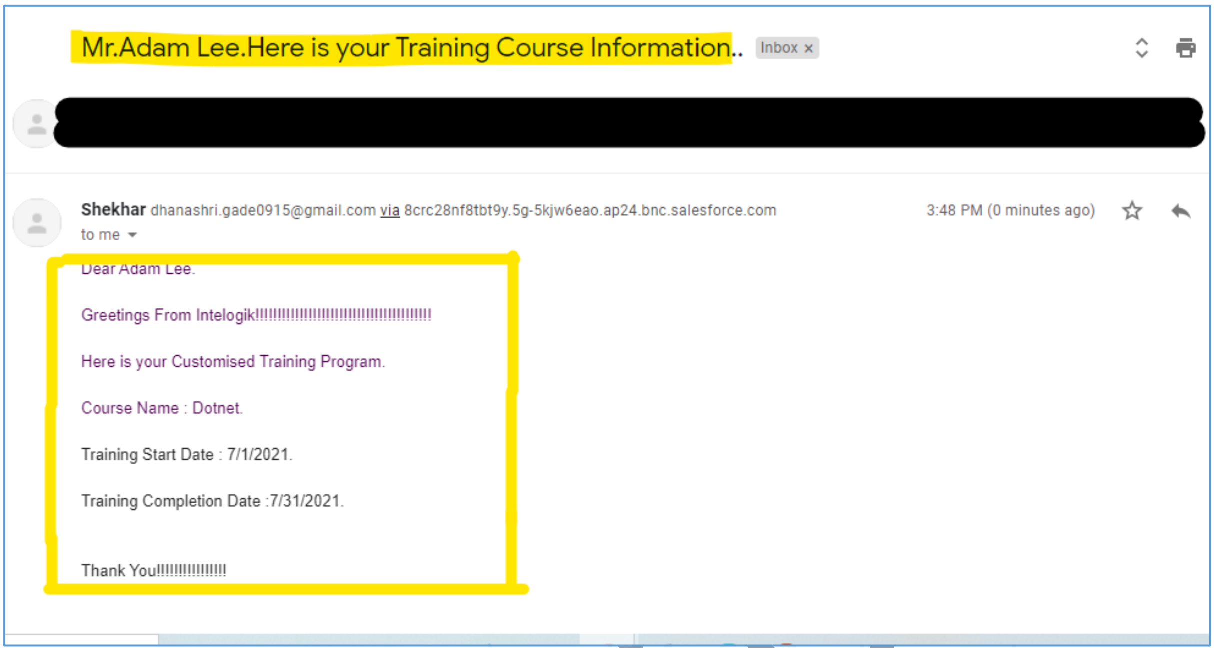
(3). Create Immediate Workflow Action: New Email Alert.



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



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

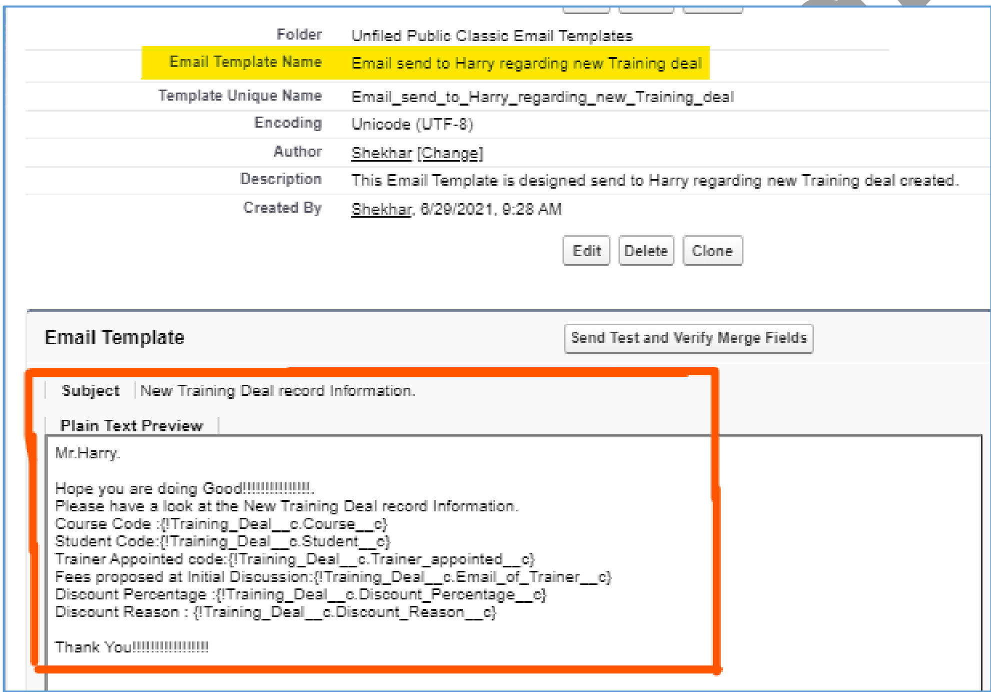


(C).Client wants to create Scheduling Task for Harry after one day of data Entry.

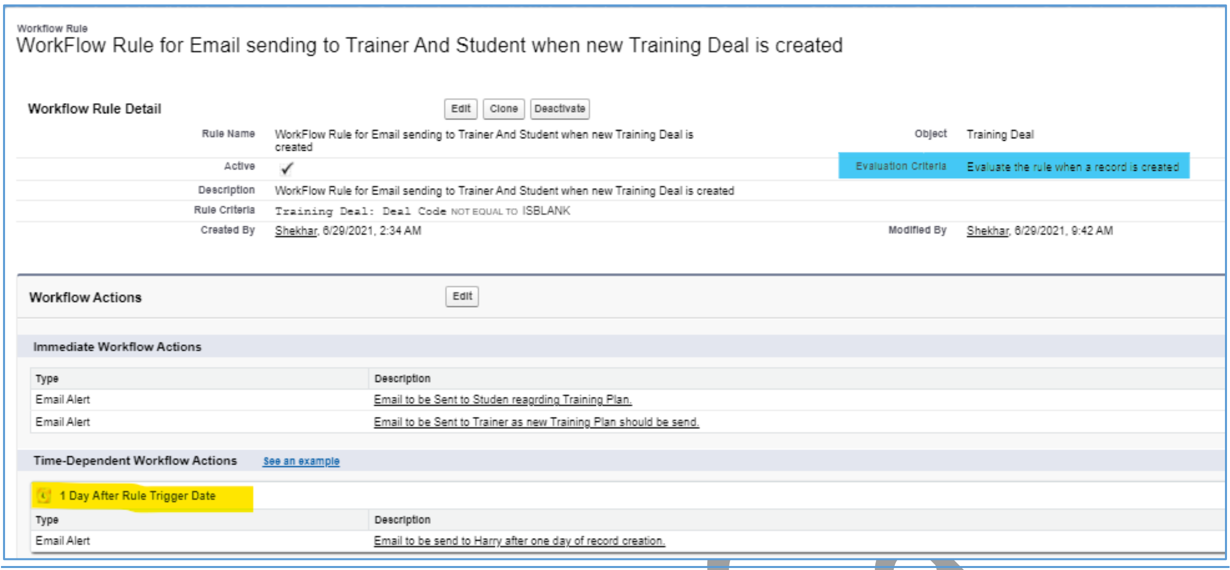
(Scope of Improvisation: After Scrum meeting with client, Client wants all immediate actions need to perform by creating Task.

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

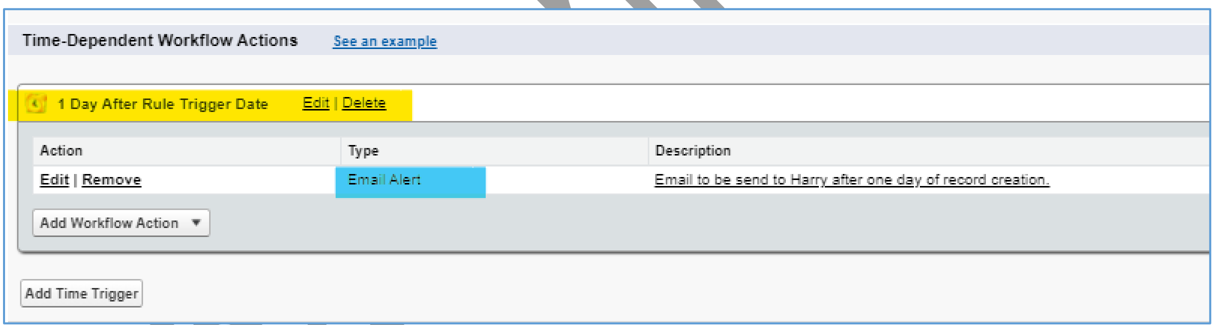
(1).As Email has to send to Harry every time after 1 day of record creation in Training Deal, I need to create "Email Template" in Classic.



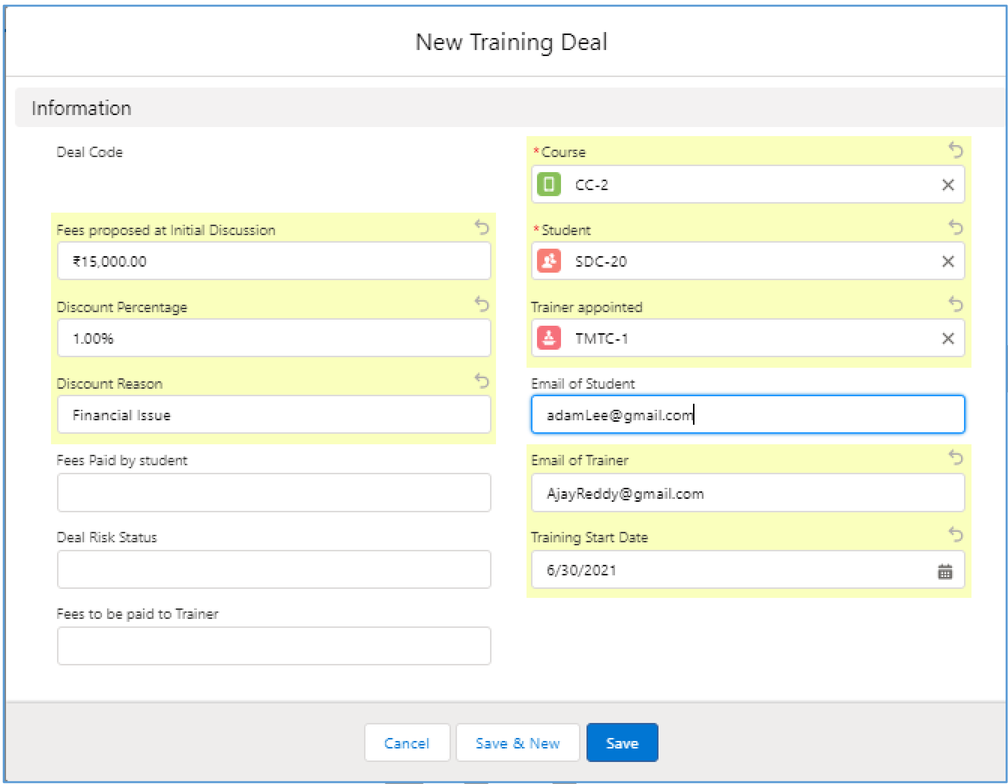
(2).Use previously Created Active Workflow Rule with Evaluation Criteria: Created and Added bare condition i.e. Deal Code <> ISBLANK.



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

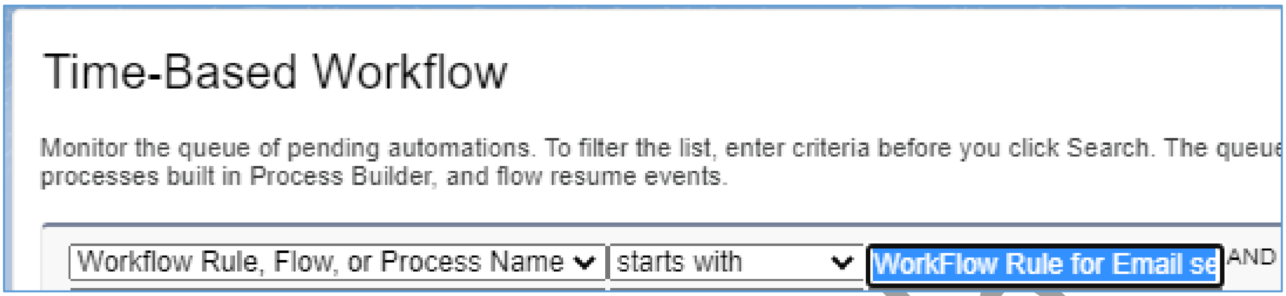


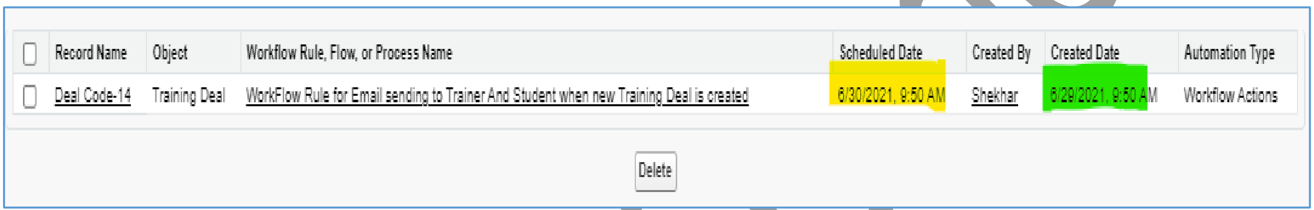
(4).Create new Training Deal records and add all proper Course, Student and trainer Details.

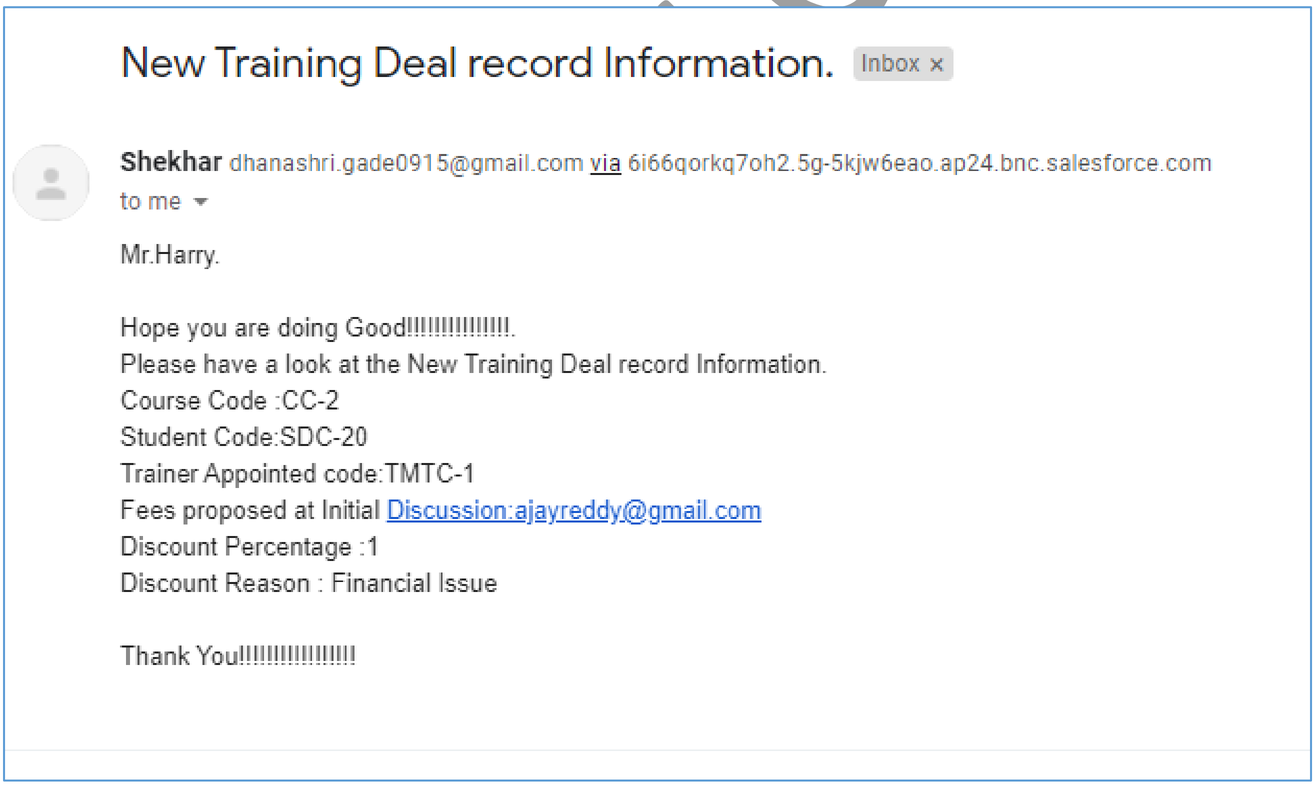


(5).As soon as new Training Deal is created, Email will be send to Harry after 1 day regarding 'new entry in Training Deals.

I can also Monitor Time Dependant Actions as below:

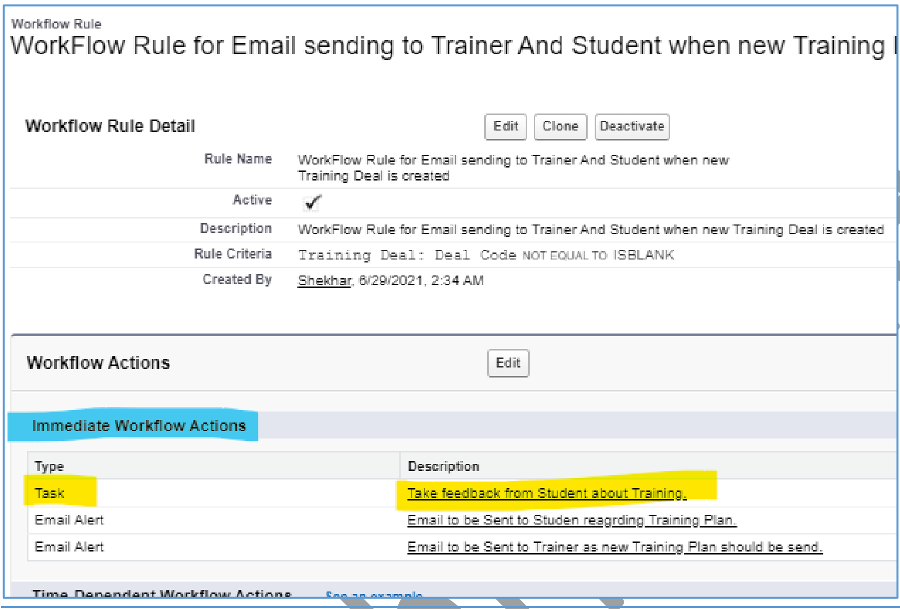




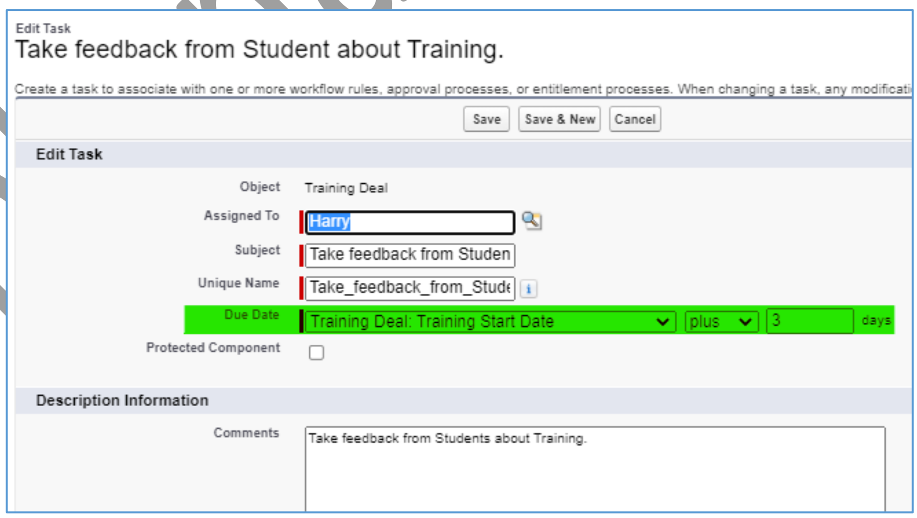


(E).Client wants to create Task for Harry after one day of training started to take feedback from Student about Training.

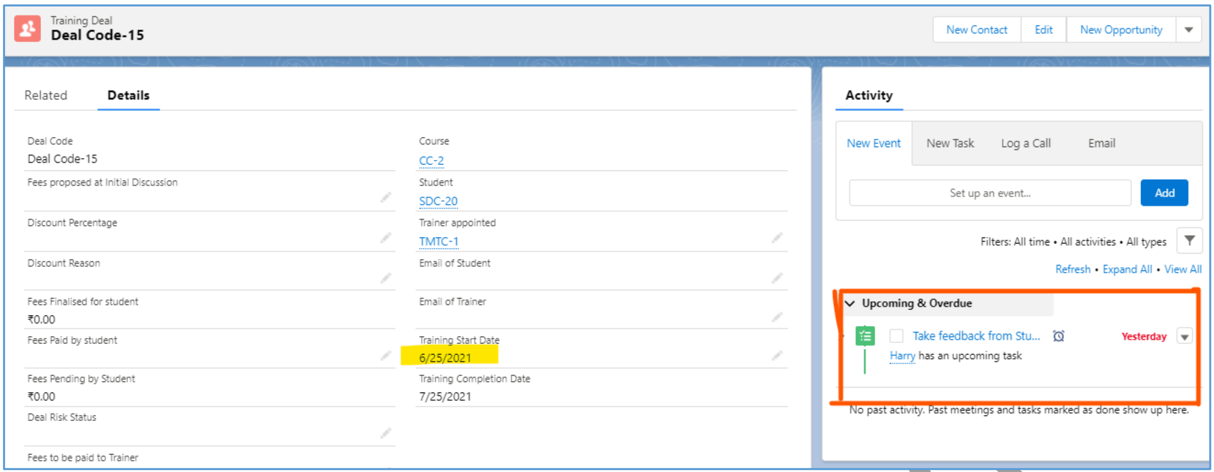
(1).Use previously Created Active Workflow Rule with Evaluation Criteria: Created and Added bare condition i.e. Deal Code <> ISBLANK.

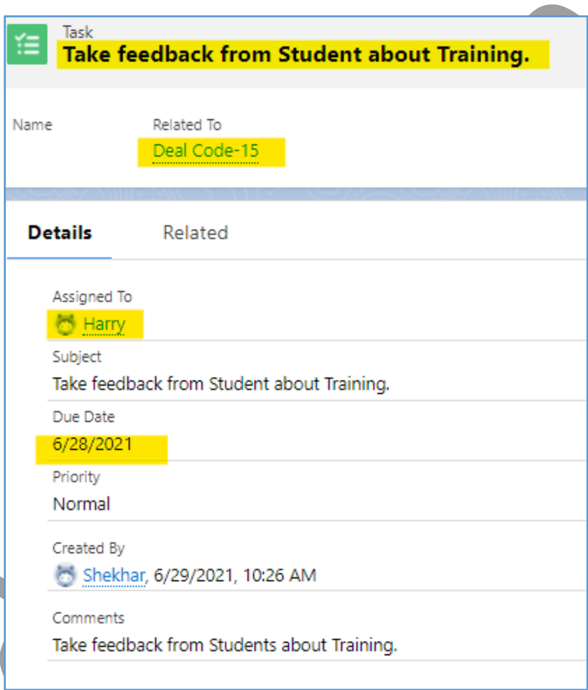


(2). Create new Immediate Workflow Action: New Task as below:



(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.


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

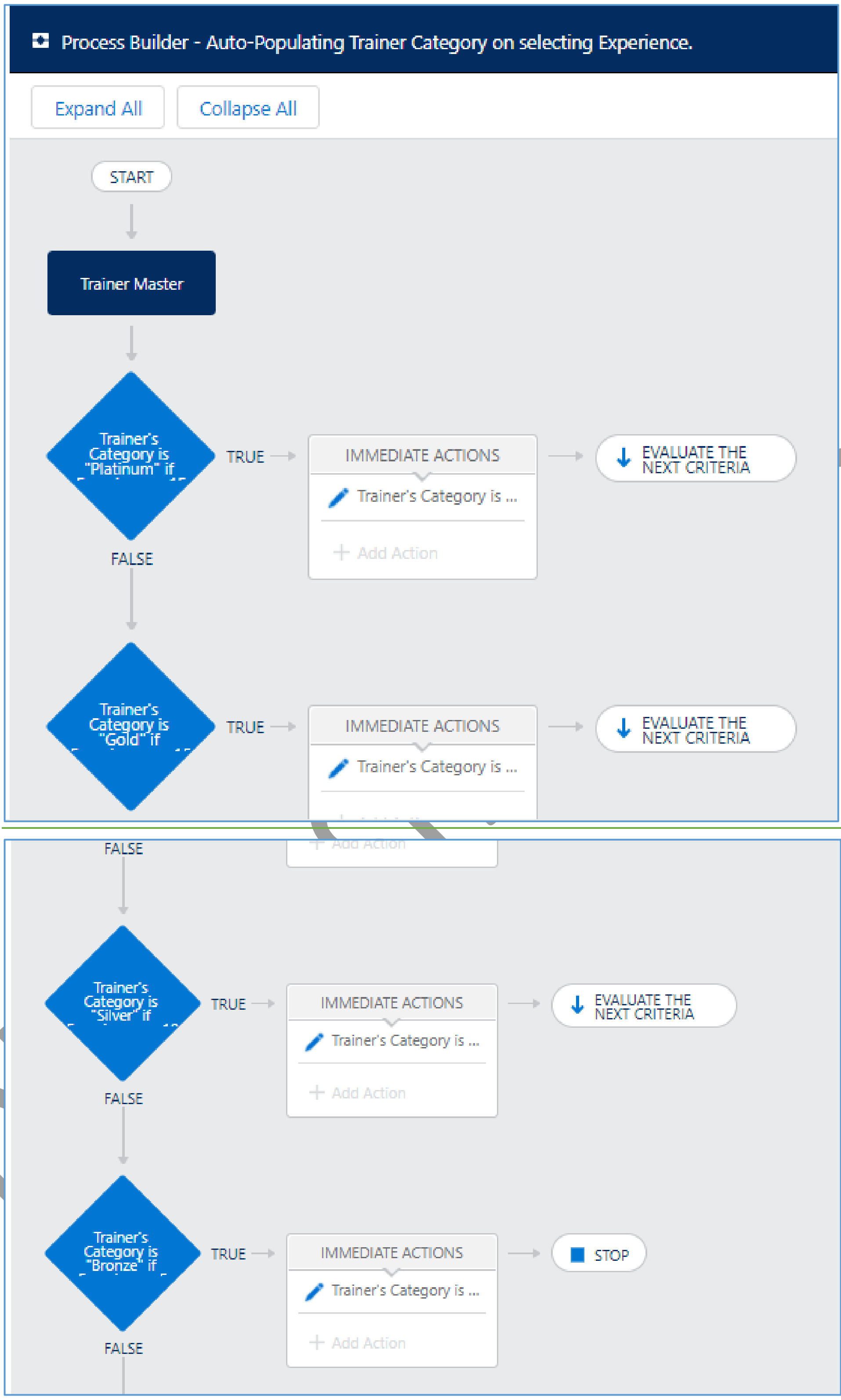
Process Name		Auto-Populating Trainer Category on selecting Experience.
Object Name		Trainer Master
Specify When to Start the Process		Only when Record is created or edited
Module 1:	Criteria	Trainers' Experience >15
• Immediate Action		Update Record: Trainer's Category = Platinum
Module 2:	Criteria	Trainer's Experience >10 && Trainer's Experience<=15
• Immediate Action		Update Record: Trainer's Category = Gold
Module 3:	Criteria	Trainer's Experience >5 && Trainer's Experience<=10
• Immediate Action		Update Record: Trainer Category = Silver

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.

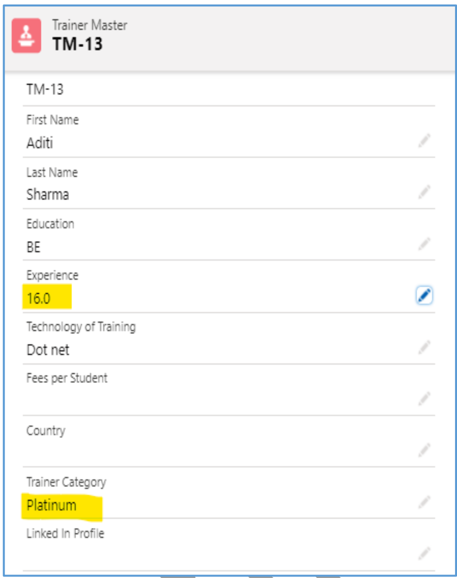
3).Activate the Process. Once the Process is activated it will perform Action as soon as Condition given in Process is satisfied.



Process Builder - Auto-Populating Trainer Category on selecting Experience.
Expand All
Collapse All
START
Trainer Master
Trainer's Category is "Platinum" if
TRUE
IMMEDIATE ACTIONS
Trainer's Category is ...
Add Action
EVALUATE THE NEXT CRITERIA
FALSE
Trainer's Category is "Gold" if
TRUE
IMMEDIATE ACTIONS
Trainer's Category is ...
EVALUATE THE NEXT CRITERIA
FALSE
Trainer's Category is "Silver" if
TRUE
IMMEDIATE ACTIONS
Trainer's Category is ...
Add Action
EVALUATE THE NEXT CRITERIA
FALSE
Trainer's Category is "Bronze" if
TRUE
IMMEDIATE ACTIONS
Trainer's Category is ...
Add Action
STOP
FALSE

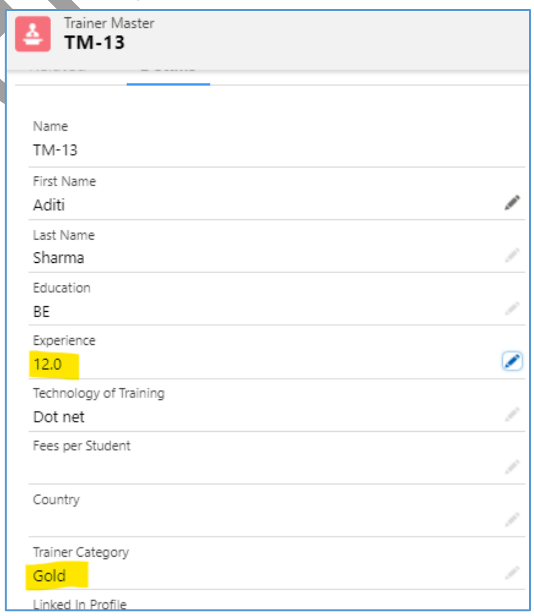
(1).Client wants to create Auto populate Trainer's Category "Platinum" on entering Experience more than 15.

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



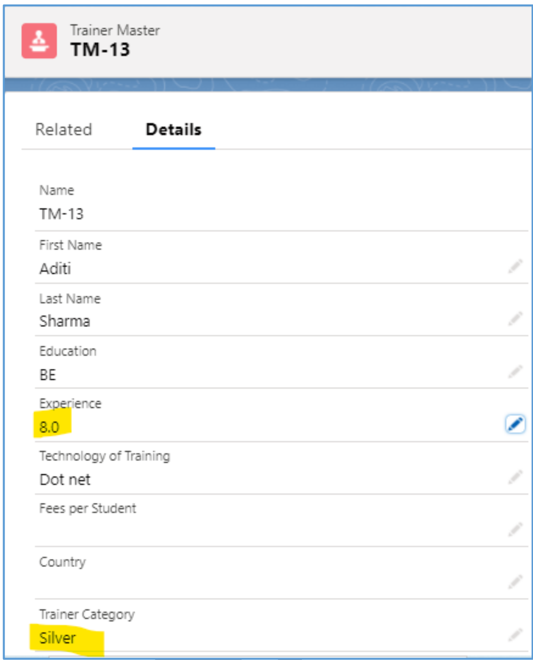
(2).Client wants to create Auto populate Trainer's Category as "Gold" on entering Experience more than or equal to 10 and less than 15.

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



(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.



(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

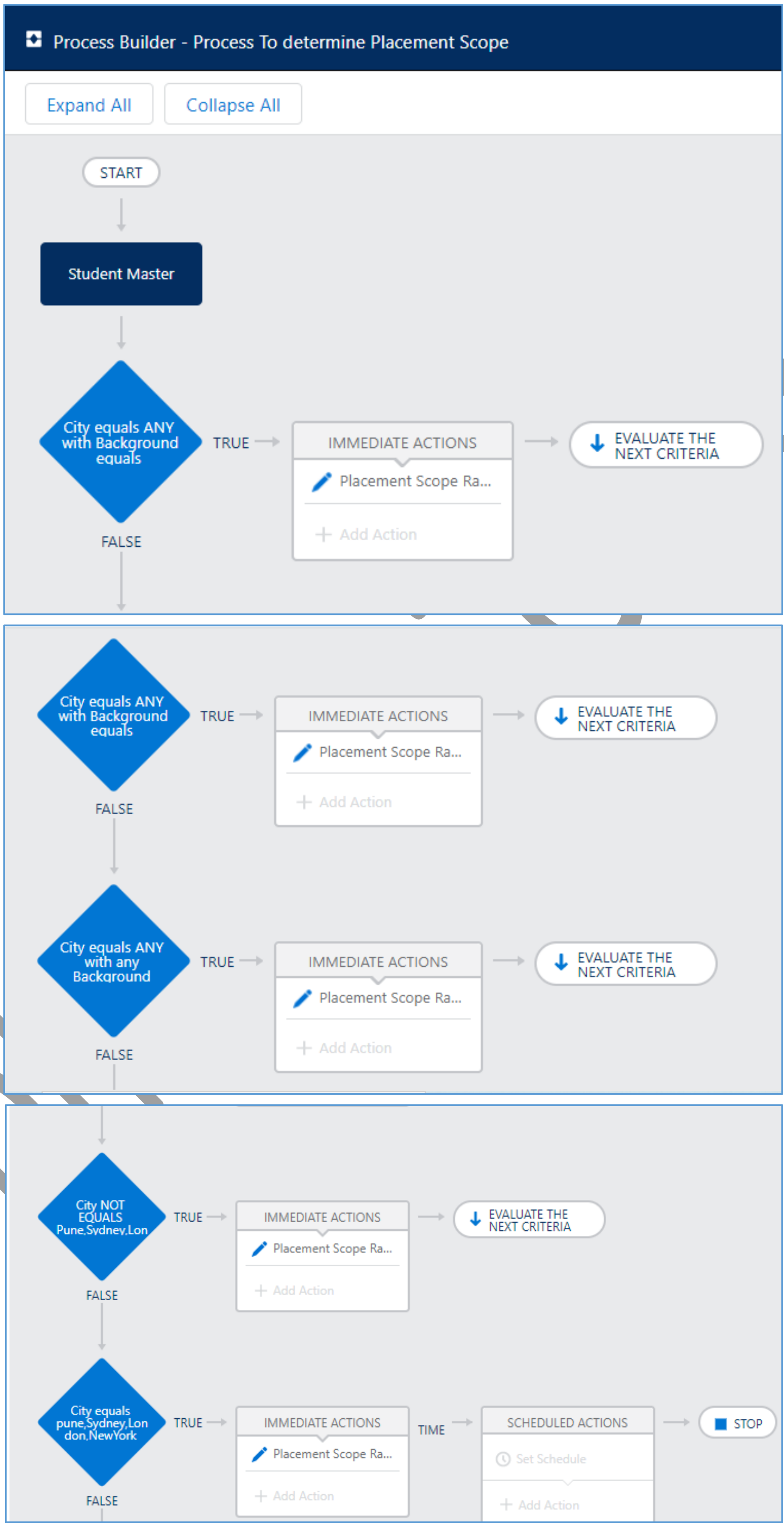
Client wants marketing team should get to know which student has potential to get placed quickly depending on Student's City and Background and accordingly "Placement Rating Scope" field should be auto populated.

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)

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

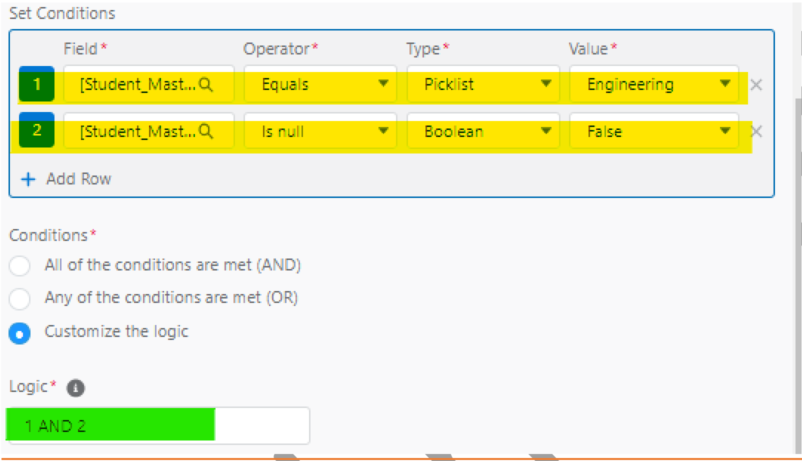
Using above conditions if two conditions are satisfying then lower value will be considered. This can be done by selecting “Evaluate next Criteria” once any condition is True. So that even after Action is performed on condition criteria, it will evaluate next condition.


Process Builder - Process To determine Placement Scope
Expand All
Collapse All
START
Student Master
City equals ANY with Background equals
TRUE
IMMEDIATE ACTIONS
Placement Scope Ra...
Add Action
EVALUATE THE NEXT CRITERIA
FALSE
City equals ANY with Background equals
TRUE
IMMEDIATE ACTIONS
Placement Scope Ra...
Add Action
EVALUATE THE NEXT CRITERIA
FALSE
City equals ANY with any Background
TRUE
IMMEDIATE ACTIONS
Placement Scope Ra...
Add Action
EVALUATE THE NEXT CRITERIA
FALSE
City NOT EQUALS Pune,Sydney,Lon
TRUE
IMMEDIATE ACTIONS
Placement Scope Ra...
Add Action
EVALUATE THE NEXT CRITERIA
FALSE
City equals pune,Sydney,London,NewYork
TRUE
IMMEDIATE ACTIONS
Placement Scope Ra...
Add Action
TIME
SCHEDULED ACTIONS
Set Schedule
Add Action
STOP
FALSE

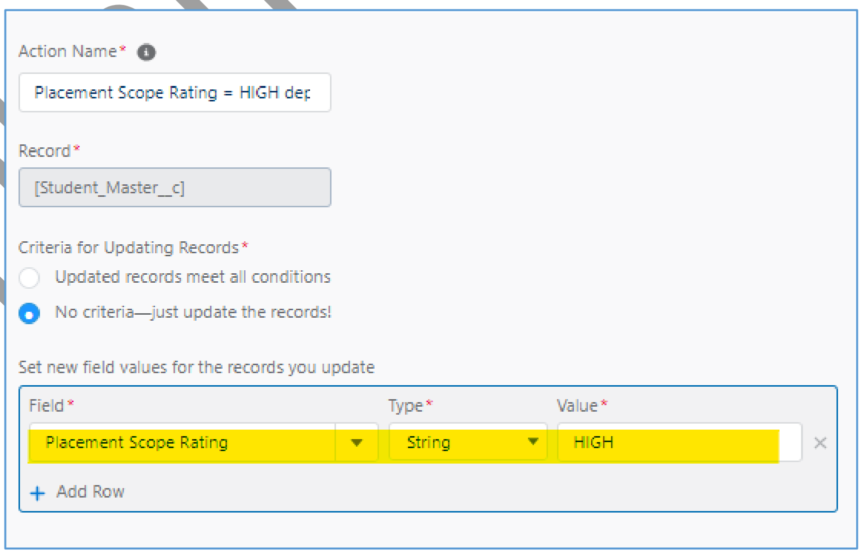
Process Name: Process to determine Placement Scope.

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

This will be First Condition criteria in Process Builder Process.



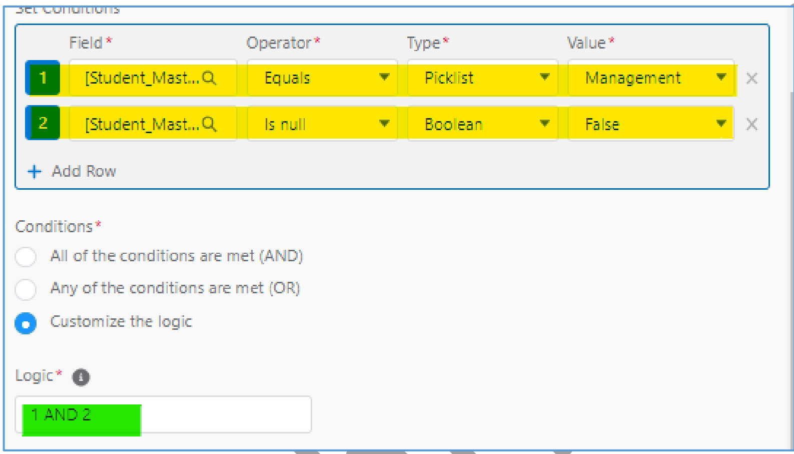
Once this condition is satisfied "Update Records "Action is performed as Placement Rating Scope: HIGH



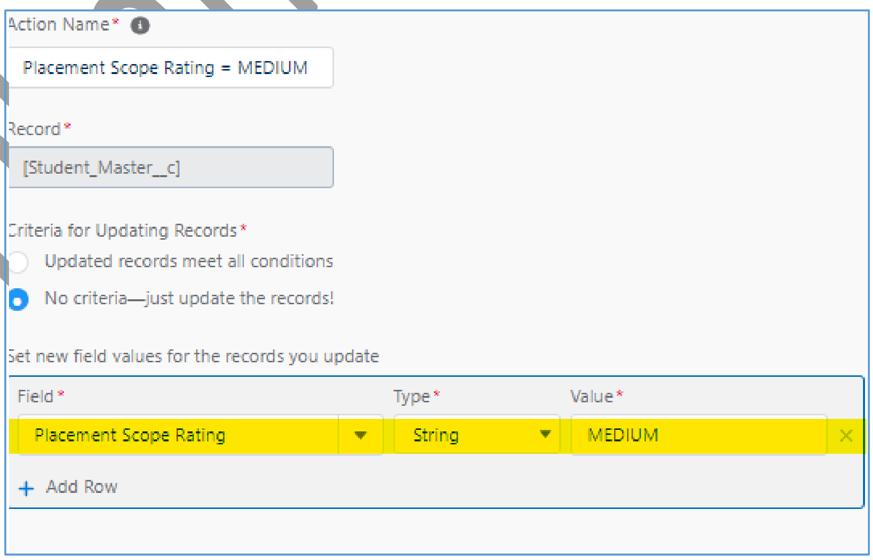
(2). If (City = Any) && (Background = Management) Then Placement Rating Scope: MEDIUM

This will be Second Condition criteria in Process Builder Process.

This will be executed when first Condition Criteria is False.



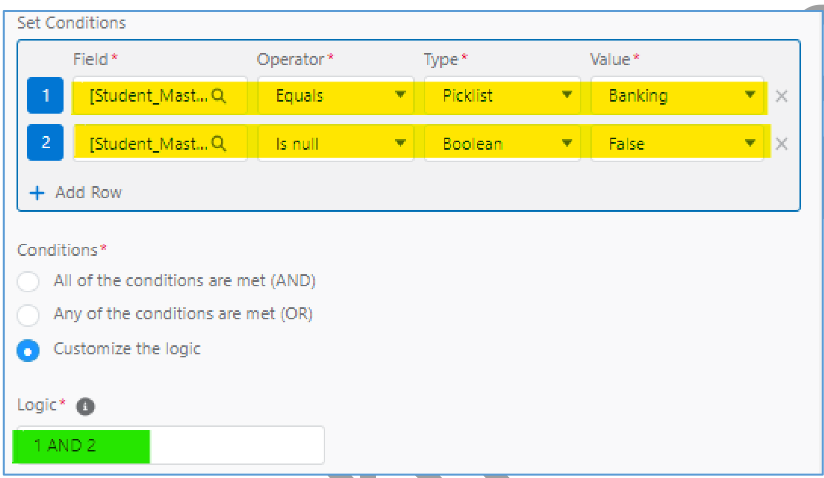
Once this condition is satisfied "Update Records "Action is performed as Placement Rating Scope: MEDIUM



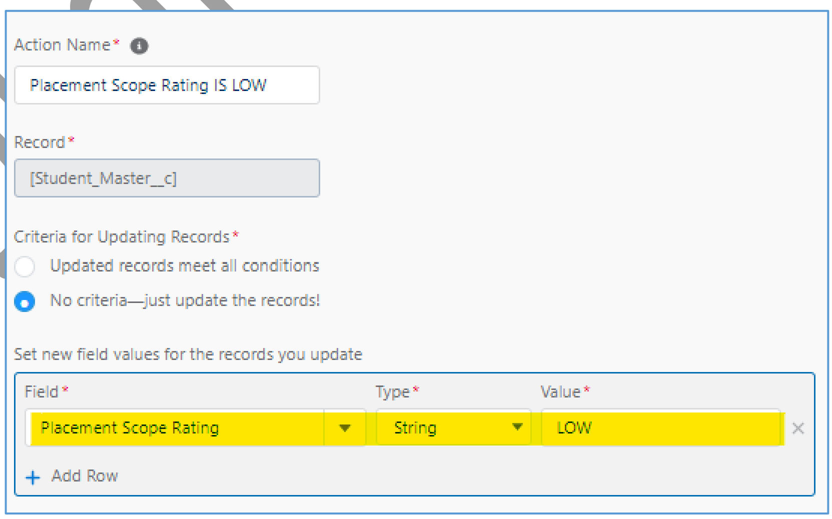
(3). If (City = Any) && (Background = Banking) Then Placement Rating Scope: LOW

This will be Third Condition criteria in Process Builder Process.

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



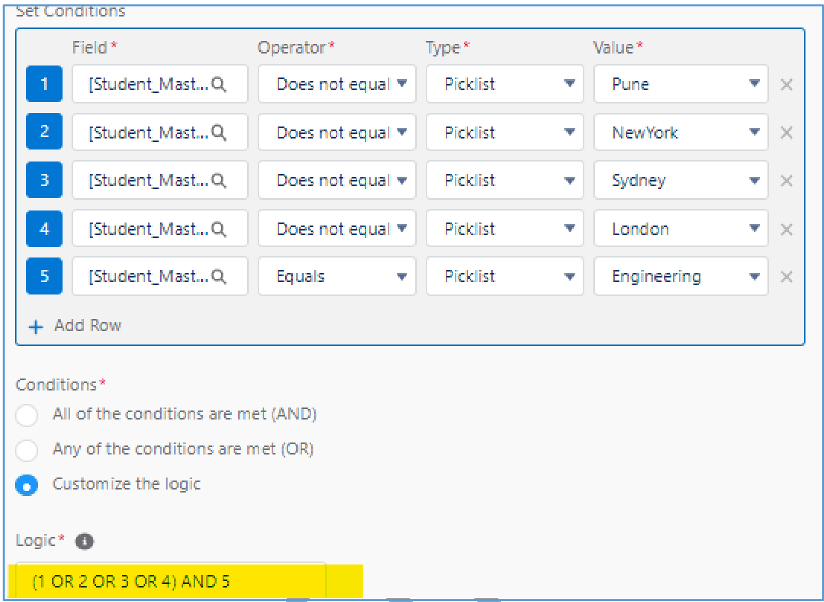
Once this condition is satisfied "Update Records "Action is performed as Placement Rating Scope: LOW



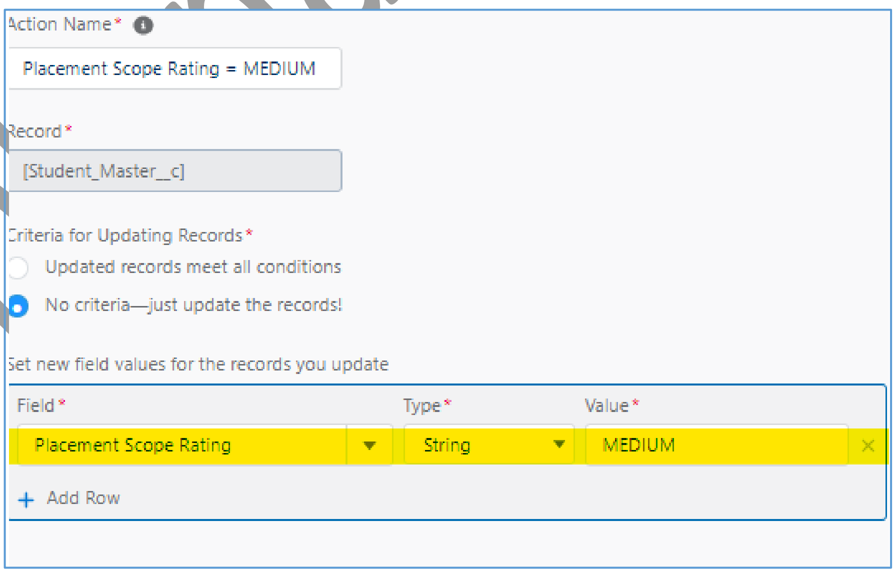
(4).If (City <> Pune, New York, London, Sydney) && (Background = Engineering) Then Placement Rating Scope: MEDIUM

This will be Fourth Condition criteria in Process Builder Process.

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



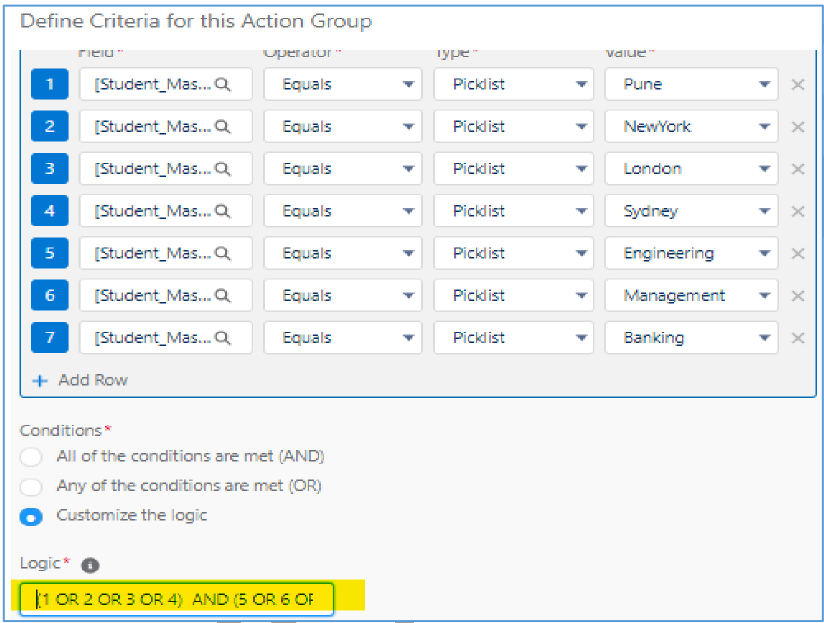
Once this condition is satisfied “Update Records “Action is performed as Placement Rating Scope: MEDIUM



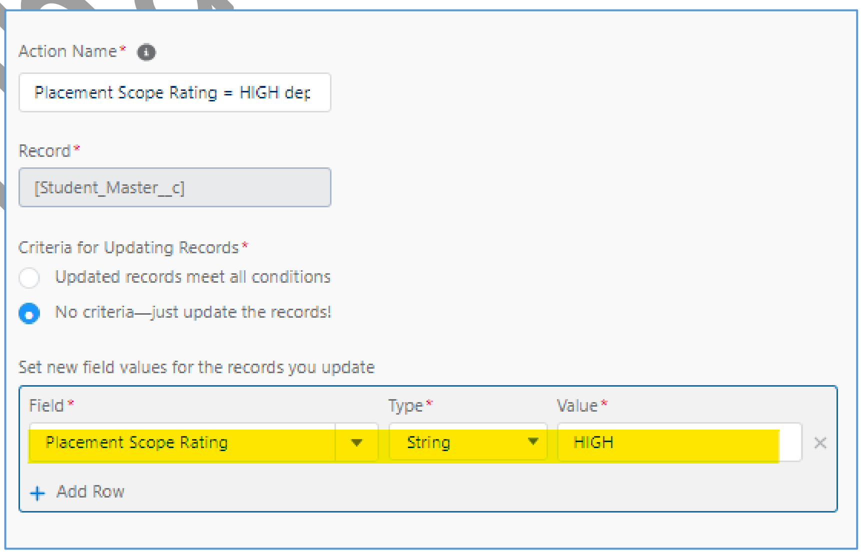
(5). If (City = Pune OR New York OR London OR Sydney)&&(Background = Engineering OR Management OR Banking) Then Placement Rating Scope: HIGH

This will be Fifth Condition criteria in Process Builder Process.

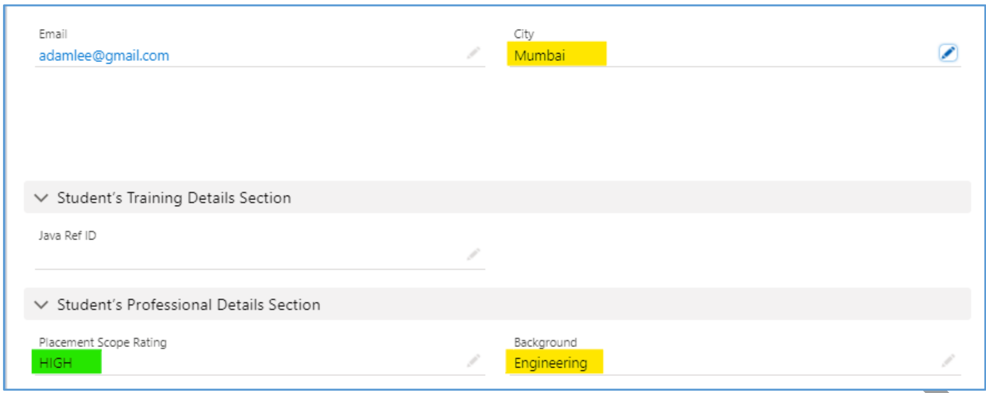
This will be executed when 1 and 2 and 3 and 4 Condition Criteria is False.



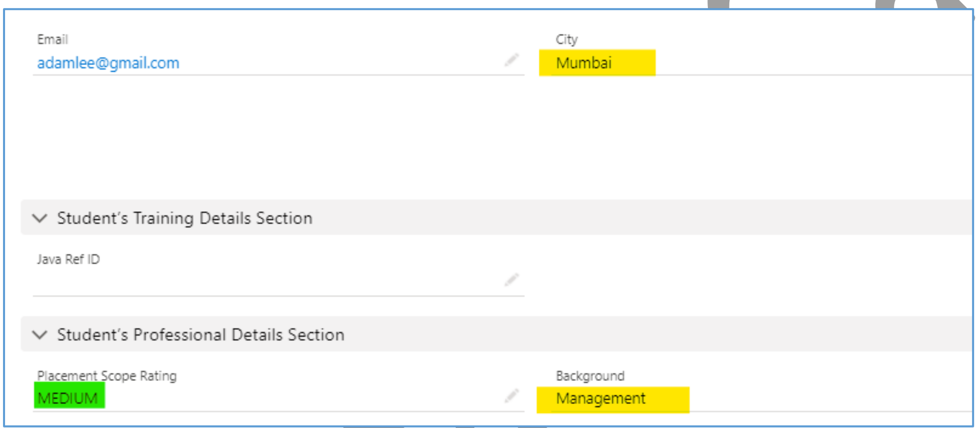
Once this condition is satisfied "Update Records "Action is performed as Placement Rating Scope: HIGH



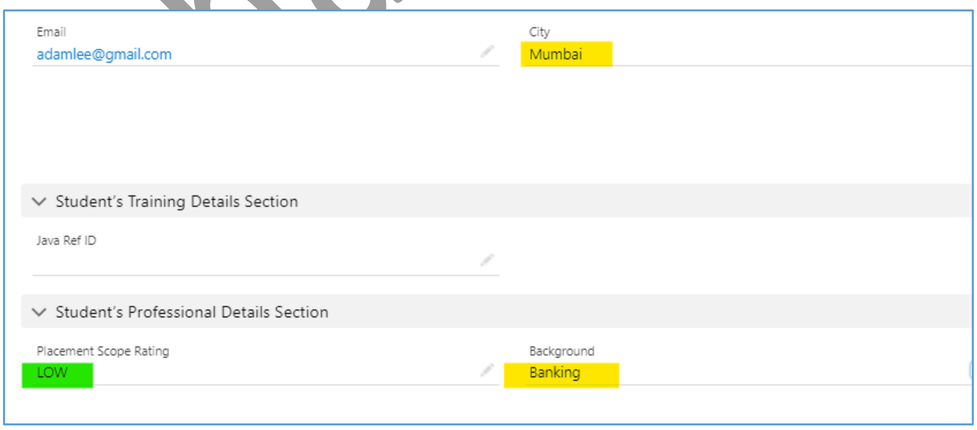
Condition 1:



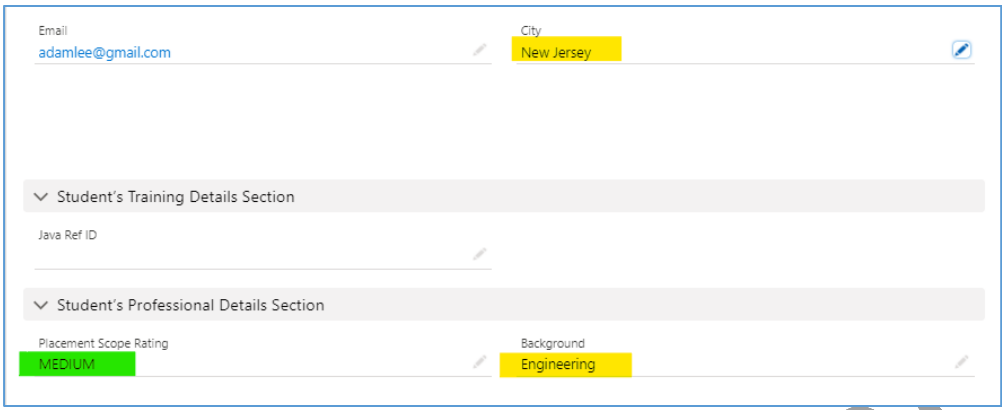
Condition 2:



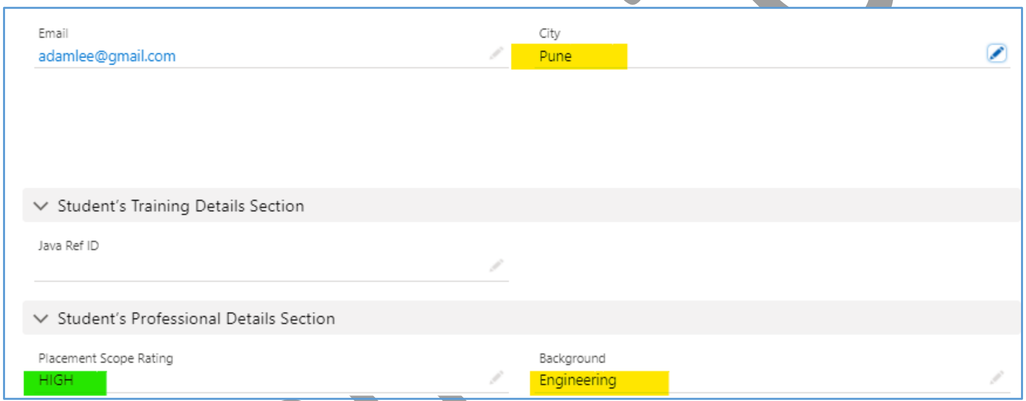
Condition 3:



Condition 4:



Condition 5:



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)
• 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)
• Immediate Action		Update Record:

		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

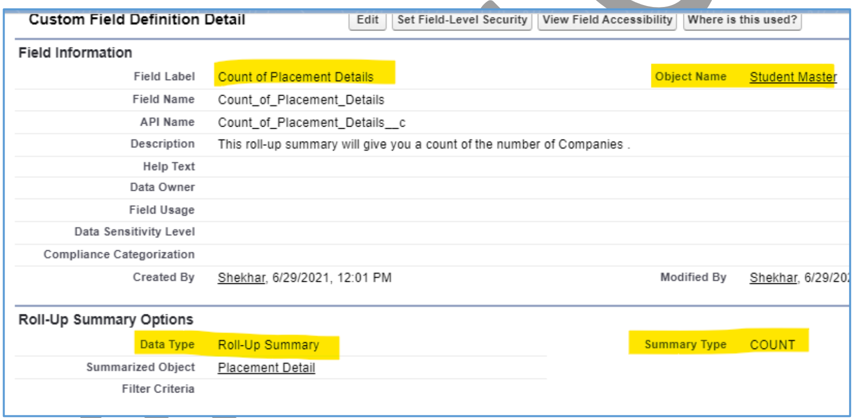
Sr no	Conditions	Deal Risk Status
1.	Fees Pending by Student c > (50 % (Course Fees))	HIGH
2.	(Discount Percentage > 20) && (Fees is Pending by Student)	MID
3.	(Discount Percentage = 0) && (Fees is Pending by Student) && (Training Completion Date has passed)	LOW

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.

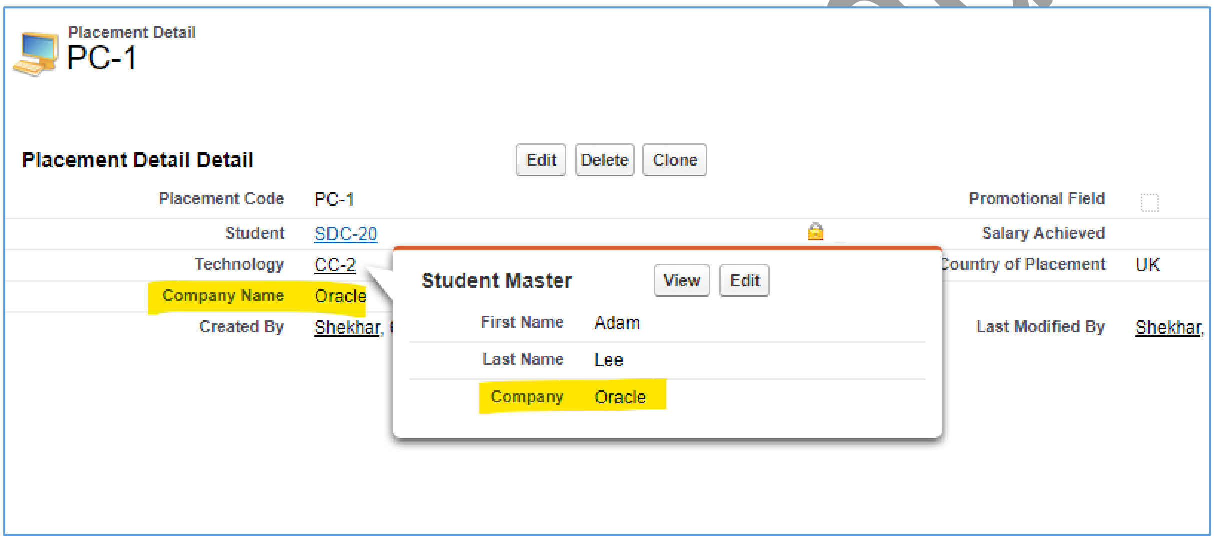
(1)To achieve this, I have created Roll Summary field (Count of Placement Details) on Master object: Student Master which will count number of placement records with that Placement record.

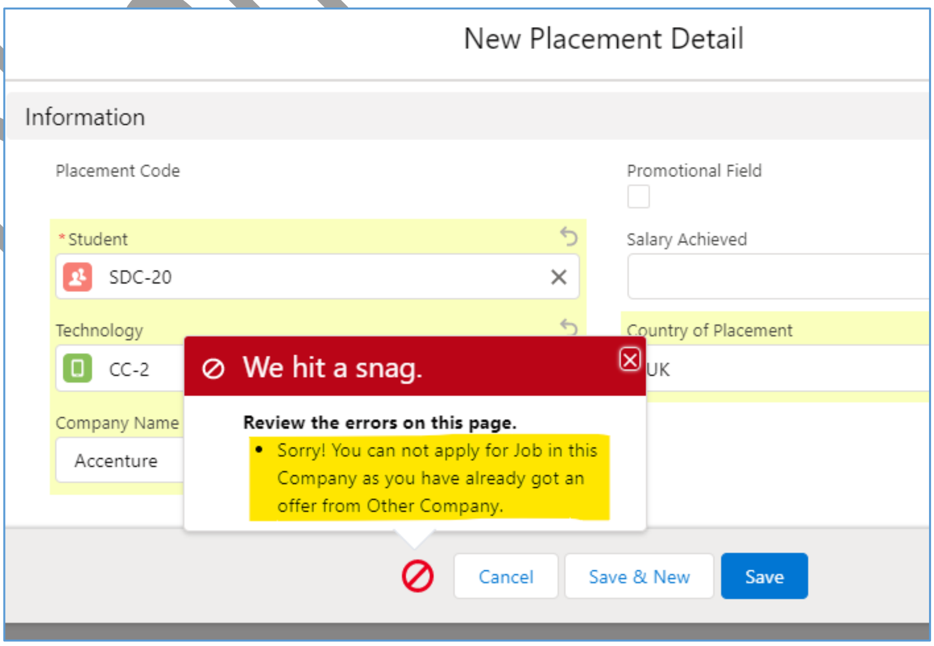


(2).I have created on validation Rule as follows:

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.

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





PROJECT WORK: STORY 13

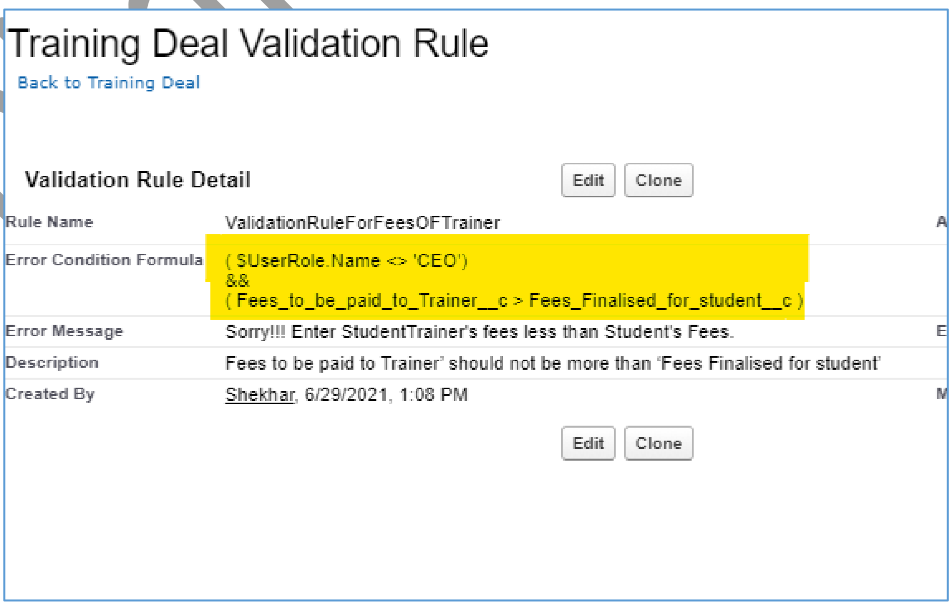
Client wants ‘Fees to be paid to Trainer’ should not be more than ‘Fees Finalised for student’ in Training Deal Object.

It will be loss to Company.

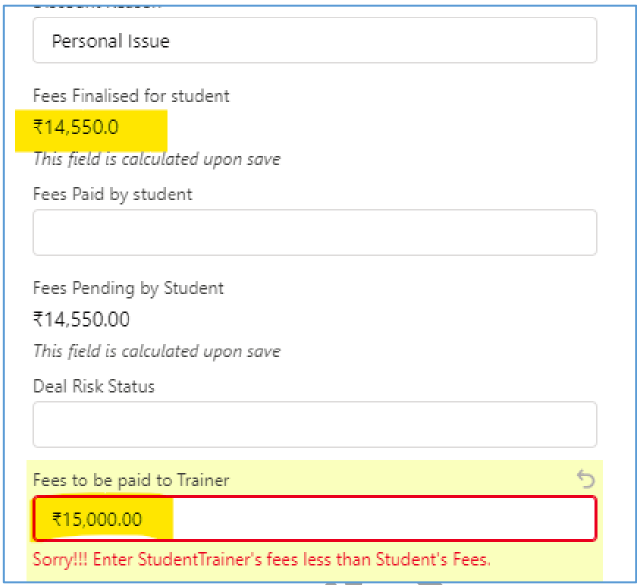
But in some Cases CEO: Shekhar can decide to give leverage to that Trainer or not.

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.

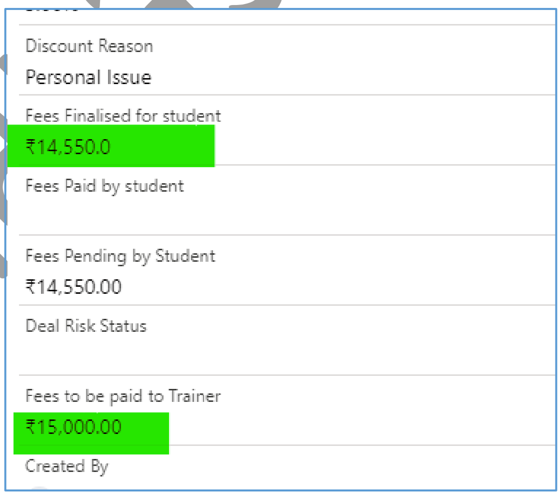
(1).This can be achieved by creating Validation Rule on ‘Training Deal’ Object where we will bypass this rule only for Shekhar as below:



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



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



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.

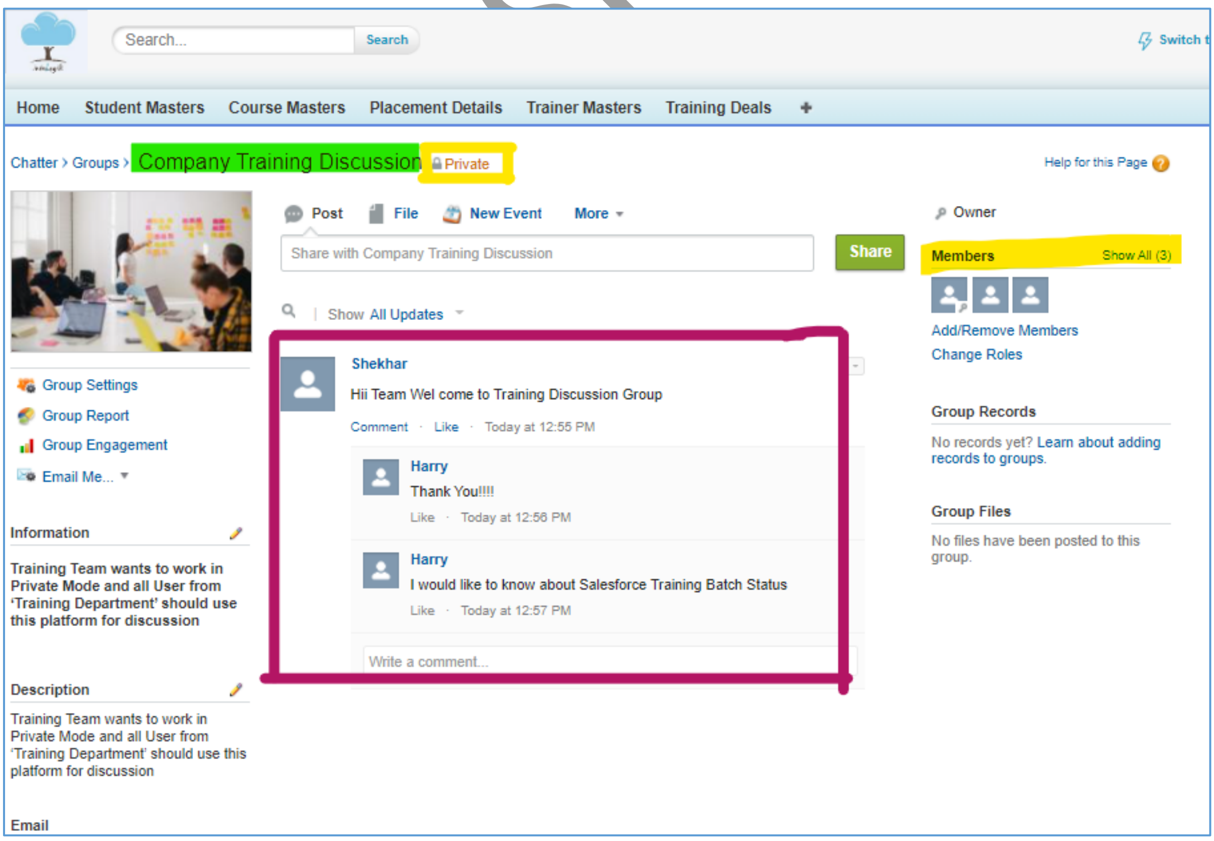
(1).Training Team wants to work in Private Mode and all User from ‘Training Department’ should use this platform for discussion.

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.



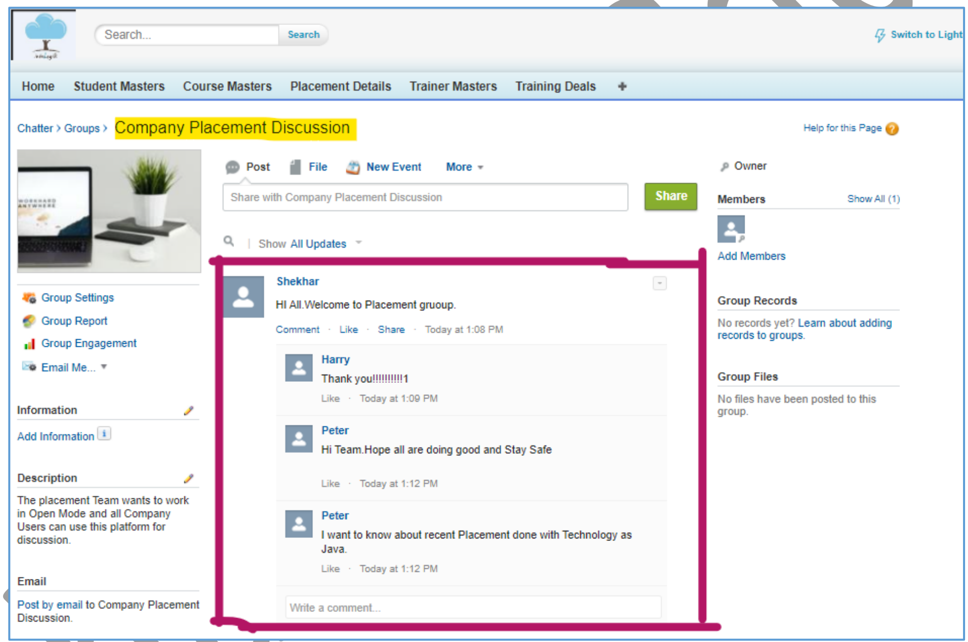
(2).Placement Team wants to work in Open Mode and all Company Users can use this platform for discussion.

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.

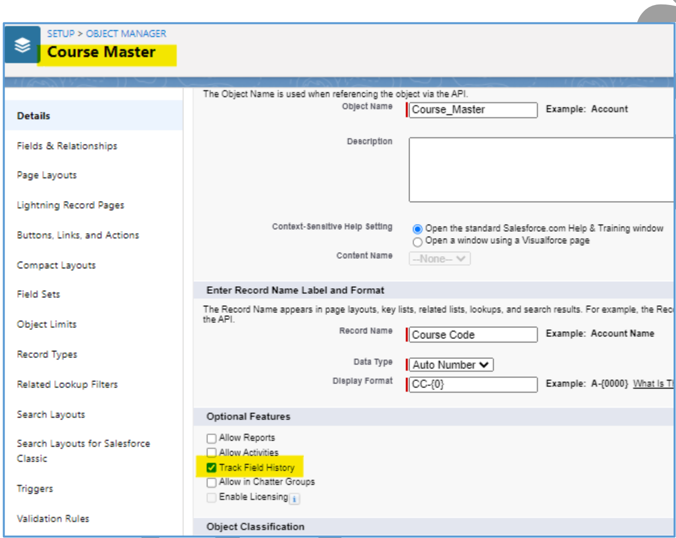


PROJECT WORK: STORY 17

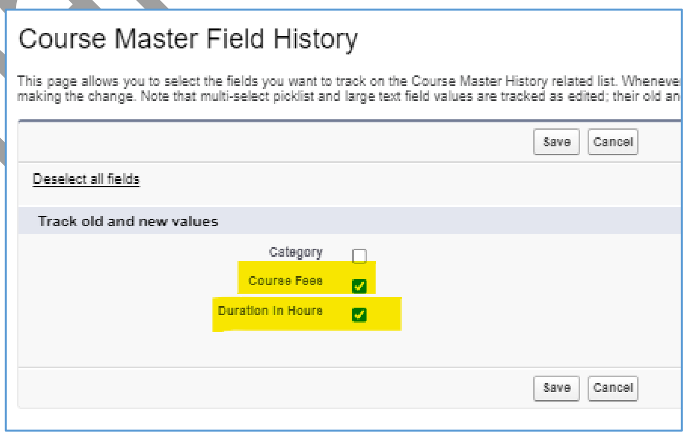
Client wants keep track of Sensitive Field changes like Fees per Student, Course Fees or Discount percentage.

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

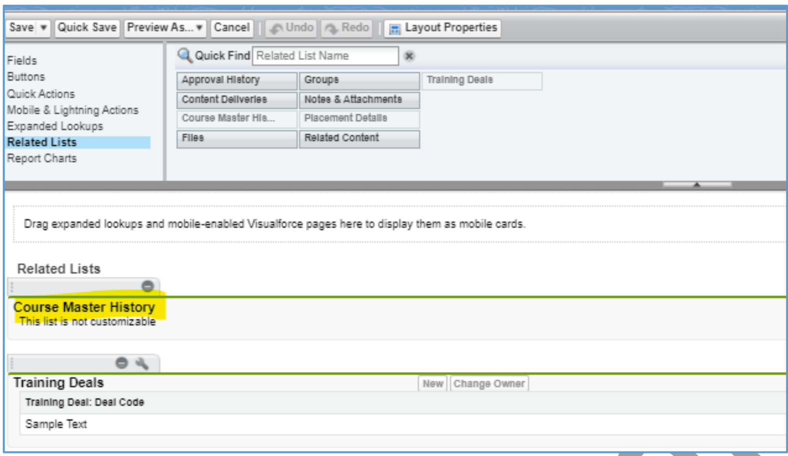
(1).Edit Course Master Object and check "Track Field History".



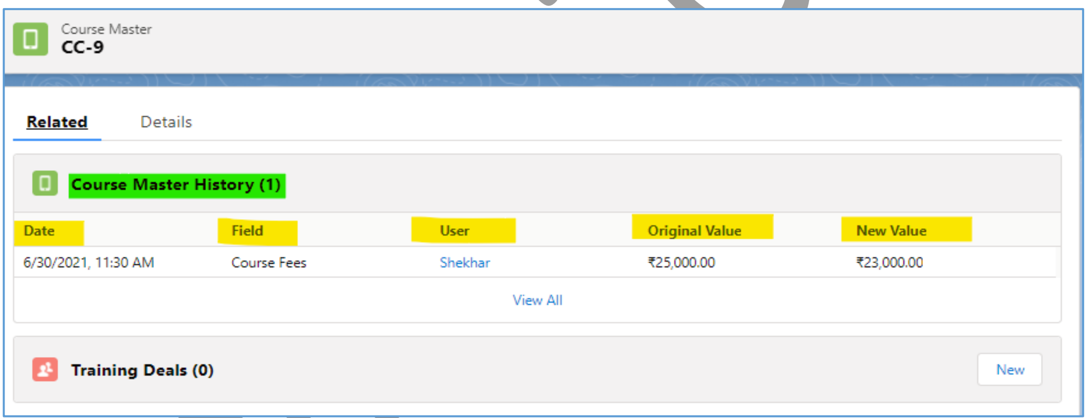
(2).Click on Fields and Relationships and there click on 'Set History Tracking'. Select Fields to track like Course Fees and Duration.

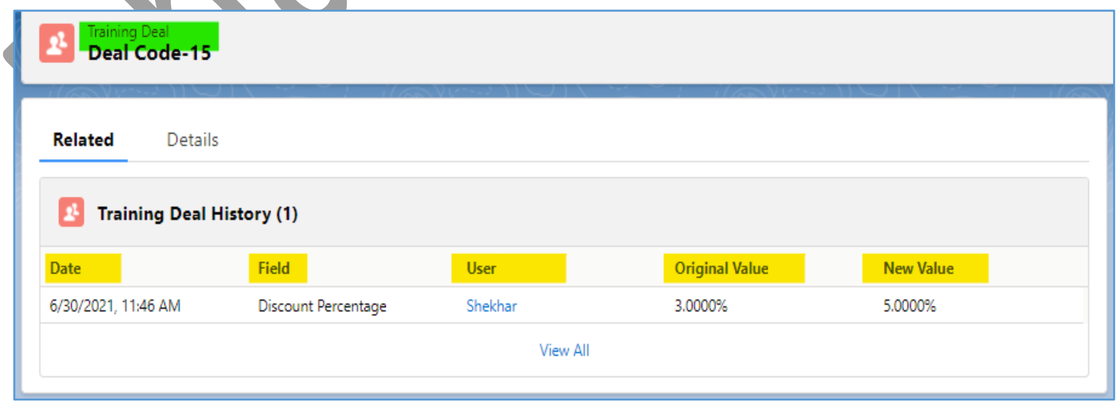


(3).Click on Page layout .Click on Related List .Here there will be option called "Course Master History". Drag and drop in Related List Section.



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





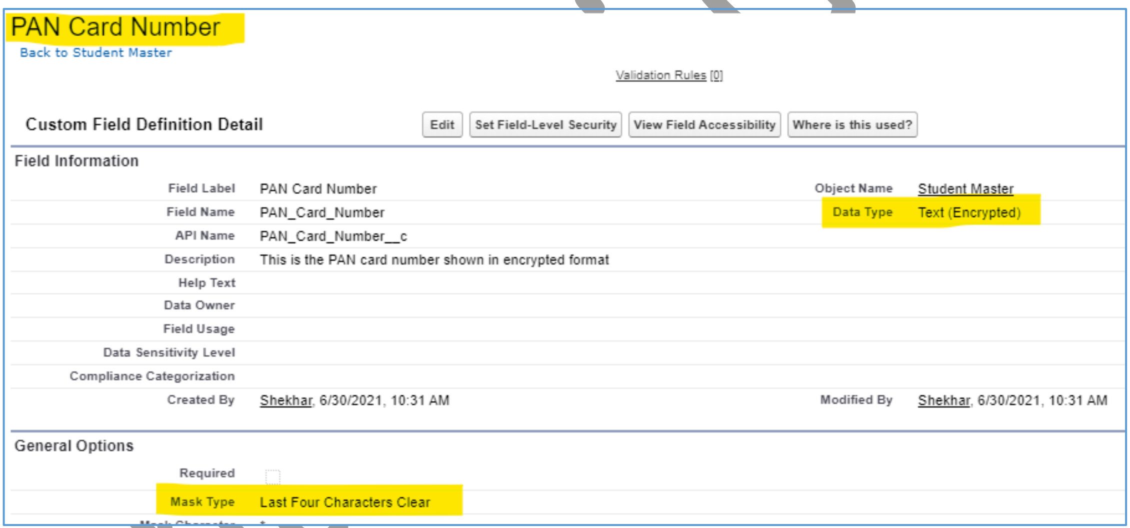
PROJECT WORK: STORY 18

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.

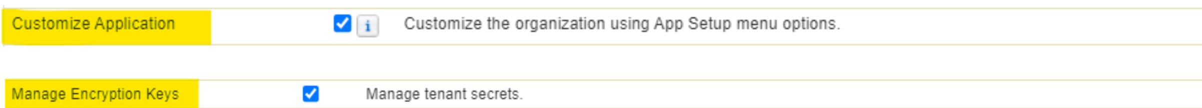


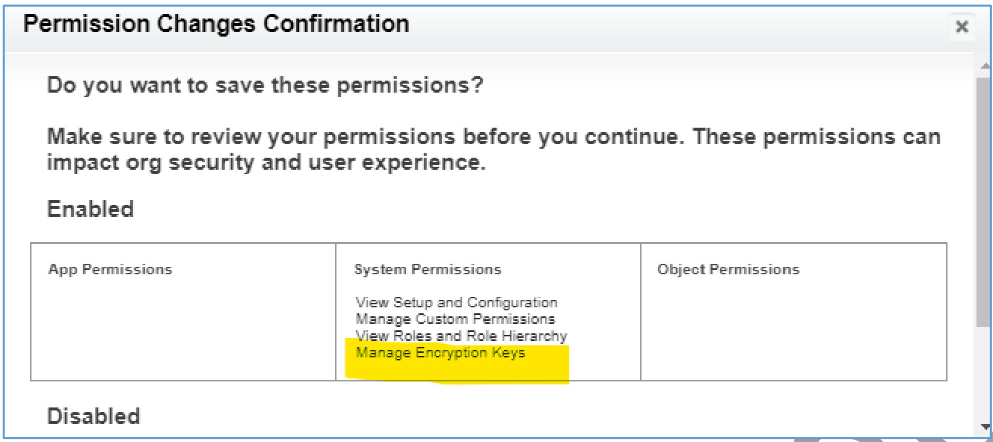
(2).PAN Card Details can be visible by seniors in Company.

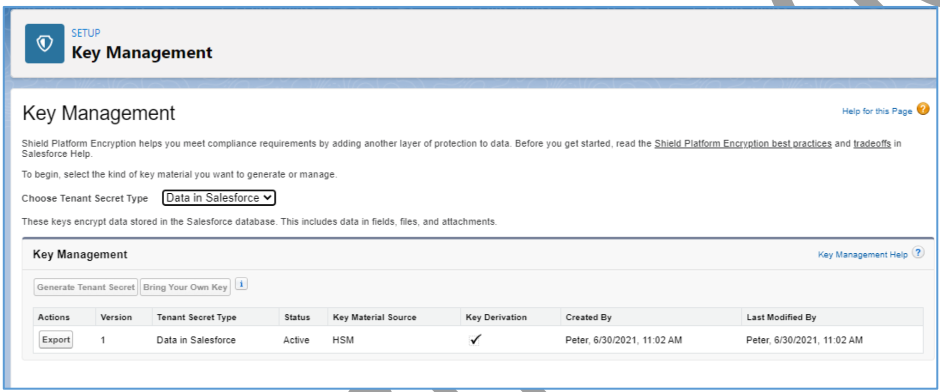
I have created Permission Set where System Permissions should be given i.e.

Customise Application and Manage Encrypted Key.

Only for USER license = Salesforce It will work.




Permission Changes Confirmation
Do you want to save these permissions?
Make sure to review your permissions before you continue. These permissions can impact org security and user experience.
Enabled
App Permissions
System Permissions
View Setup and Configuration
Manage Custom Permissions
View Roles and Role Hierarchy
Manage Encryption Keys
Object Permissions
Disabled


SETUP
Key Management
Key Management
Help for this Page
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
Generate Tenant Secret
Bring Your Own Key
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

PROJECT WORK: STORY 19

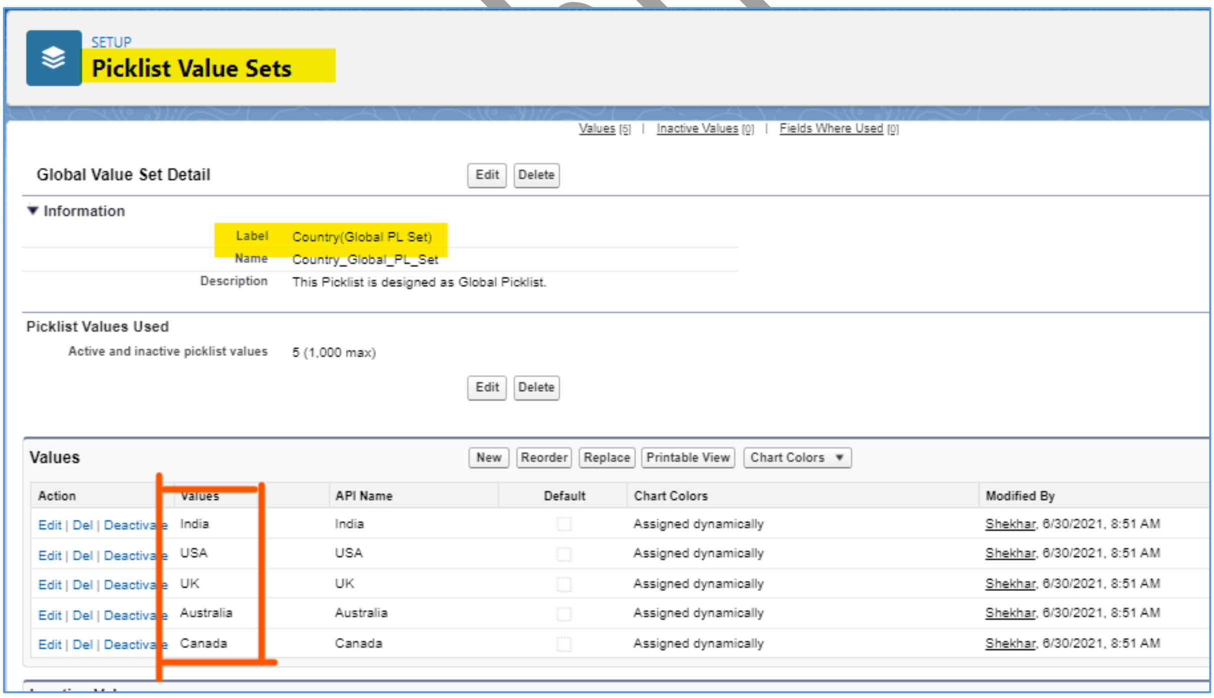
Client wants centralized way to work on Country field because Business is growing and many new entries are taking place in country field. Whenever new country value is added in any object, it is becoming difficult for client to add this new value in all concerned/related objects.

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

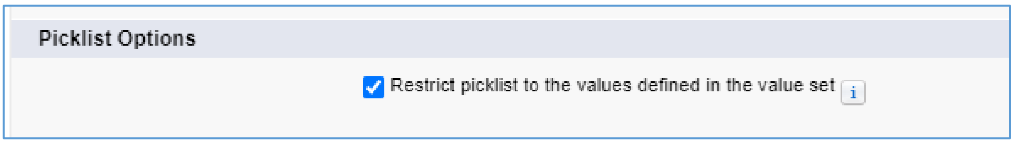
Whenever new Country Value is added into "Global Picklist Value Set", it will show same changes in all other Country Picklist.

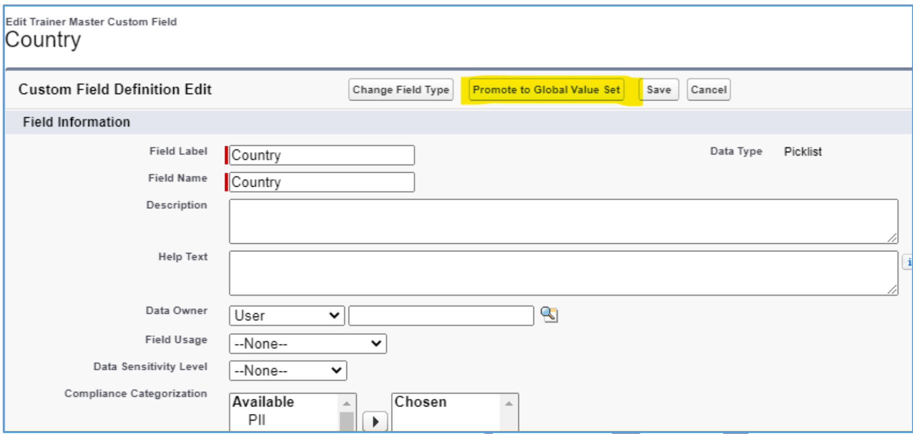
We need to Promote Local Picklist to Global Picklist.

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

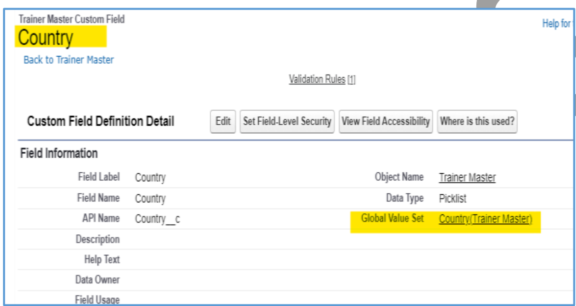


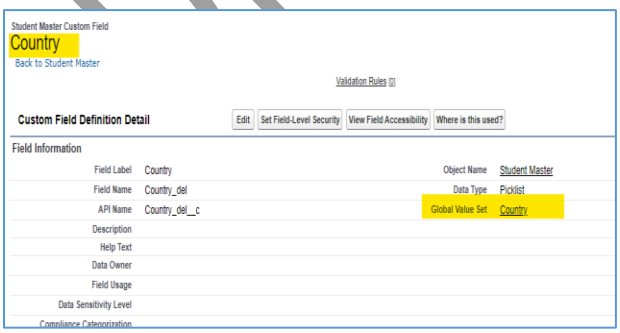
(2).Promote all Country Picklist in Trainer Master, Student Master, Placement Details objects with Global PL Set.

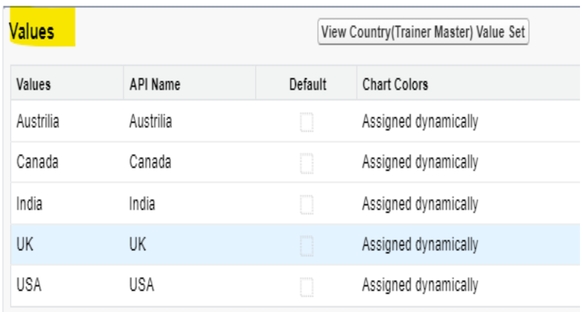




(3).All three Country Picklist is changed to Global picklist Value Set to Centralise Country Value.







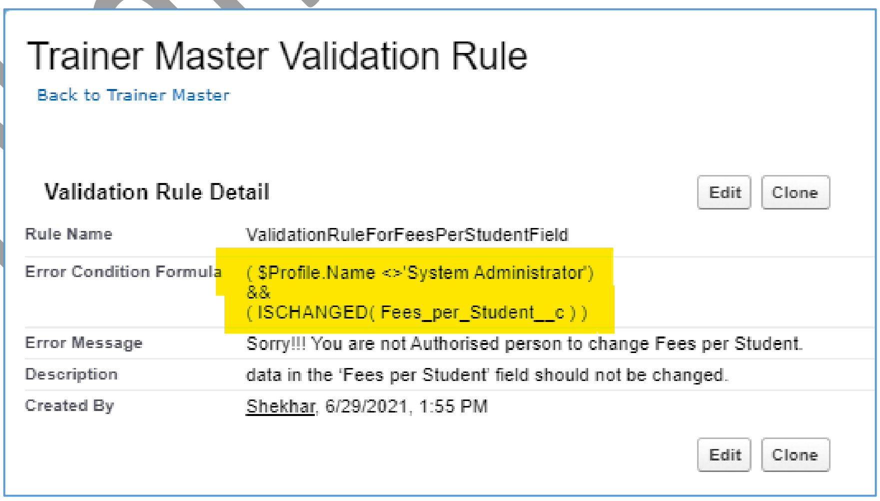
PROJECT WORK: STORY 20

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

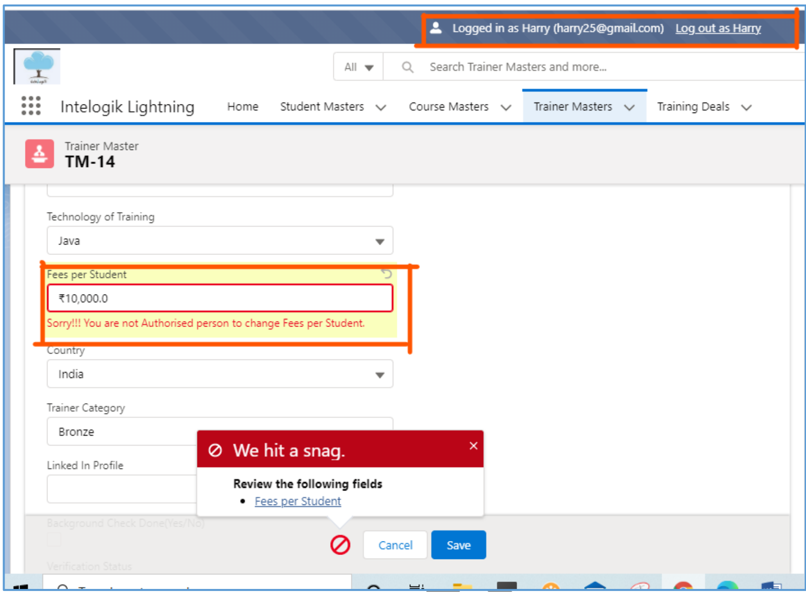
Only Users with "System Administrator" profile can change this field.

(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:

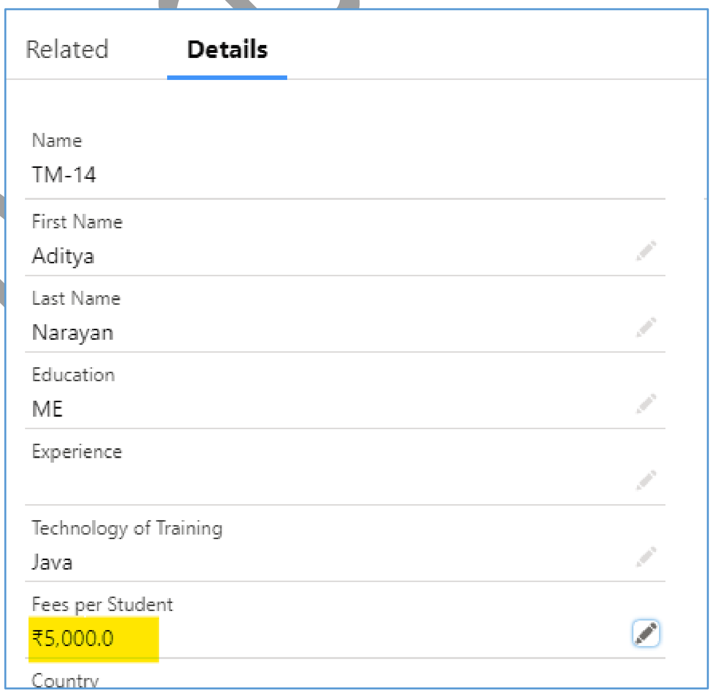
Validation Rule Name	ValidationRuleForFeesPerStudentField
Condition	: ($Profile.Name <>'System Administrator') && (ISCHANGED(Fees_per_Student__c))
Error Message	Sorry!!! You are not Authorised person to change Fees per Student.



(2)Error Message Shown for "Harry" who's Profile: Training Department.



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



PROJECT WORK: STORY 21

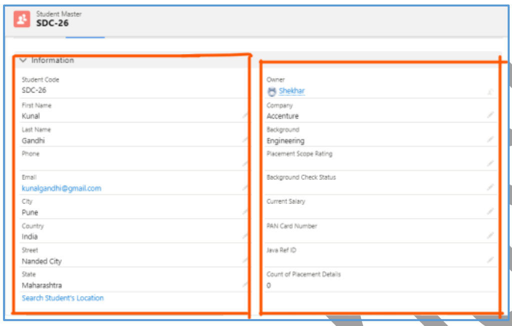
Client wants better look and feel for pages of objects created in business process.

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

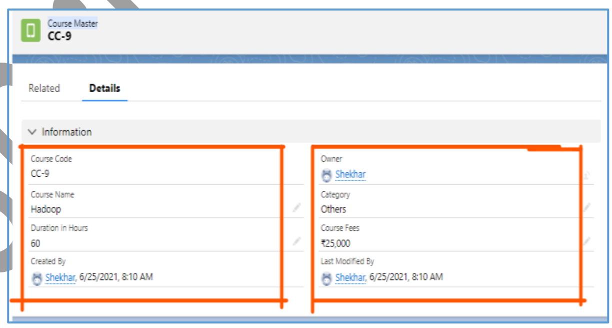
(1).Every objects records should be shown in 2 columns.

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

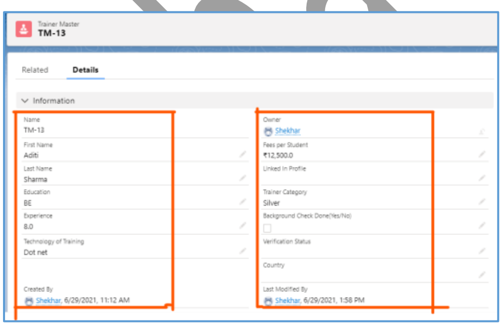
Student Master:



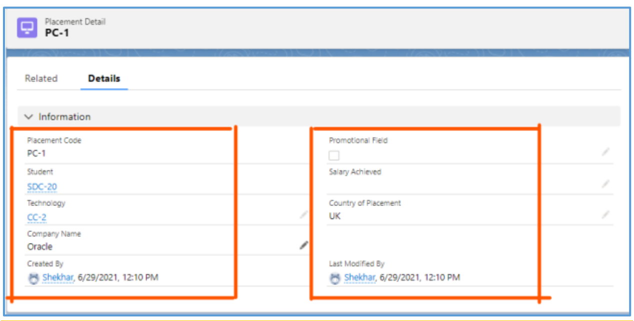
Course Master:



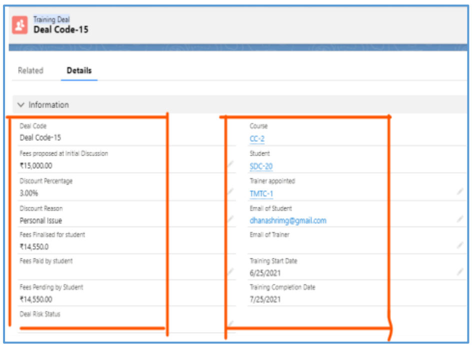
Trainer Master:



Placement Detail:

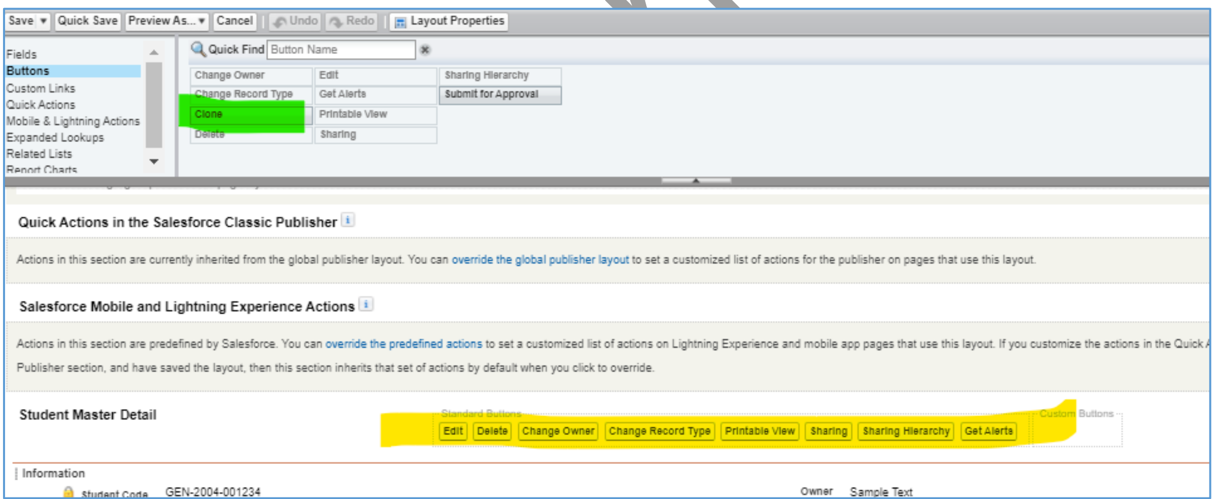


Training Deal:



(2).Clone button need not be available.

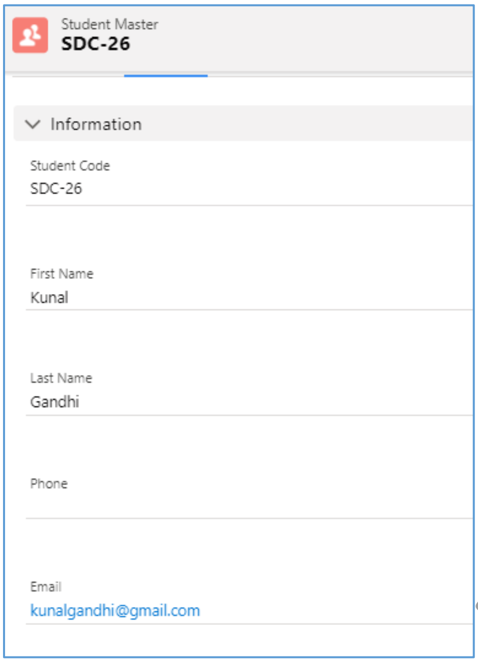
Remove Clone button from all object's page layout as follows:



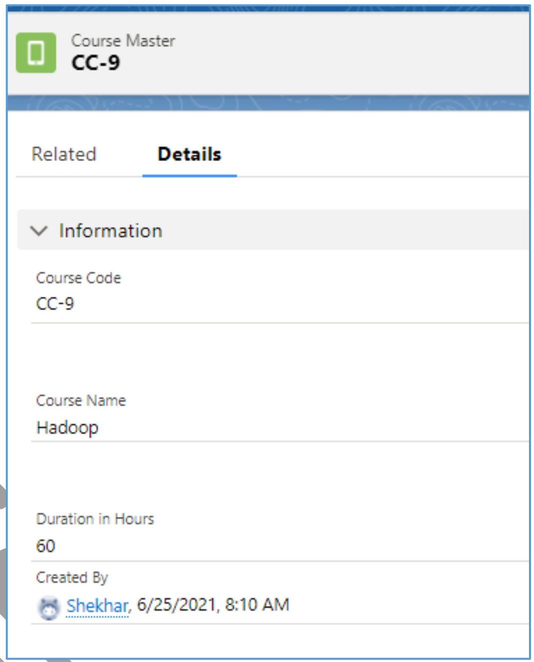
(3).Between every field they need space.

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

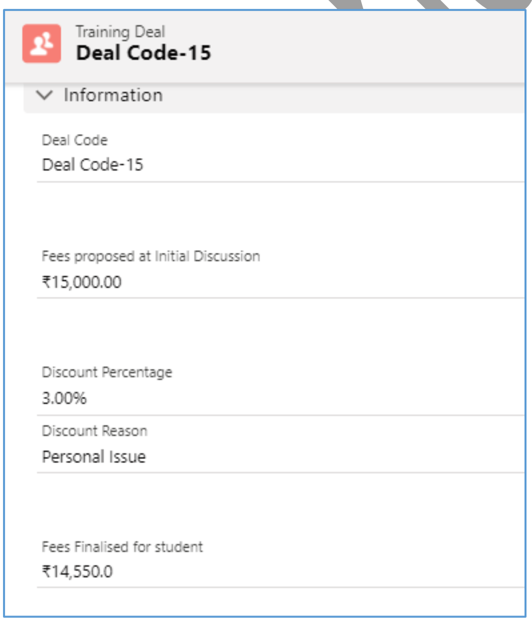
Student Master:



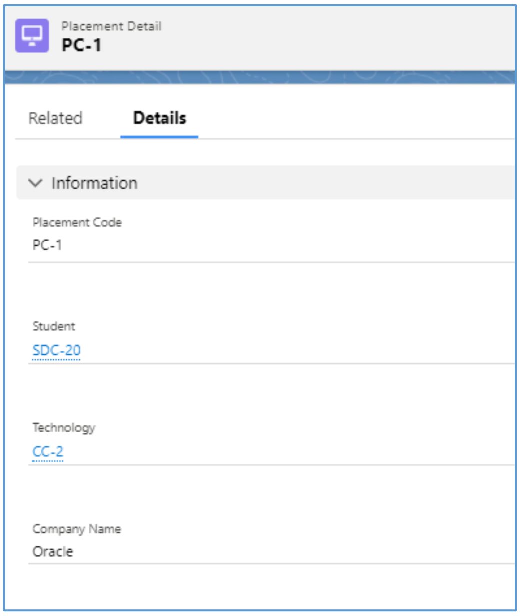
Course Master:



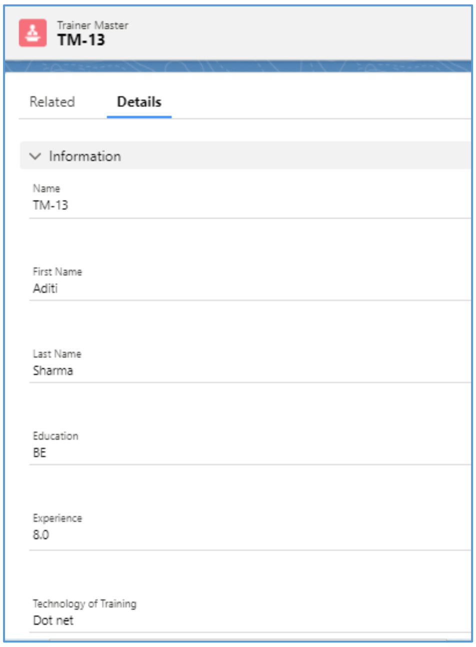
Training Deal:



Placement Detail:



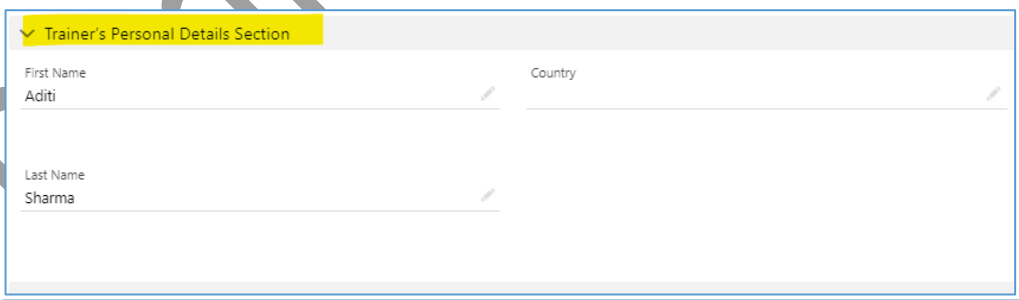
Trainer Master:



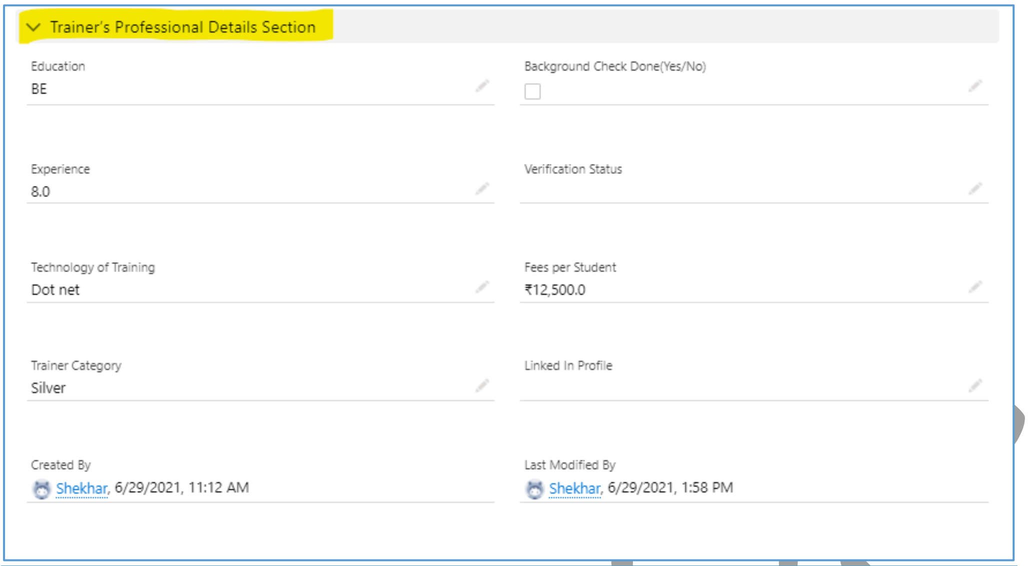
(4).Client wants two Sections in "Trainer Master "page.

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

(i) Trainer's Personal Details



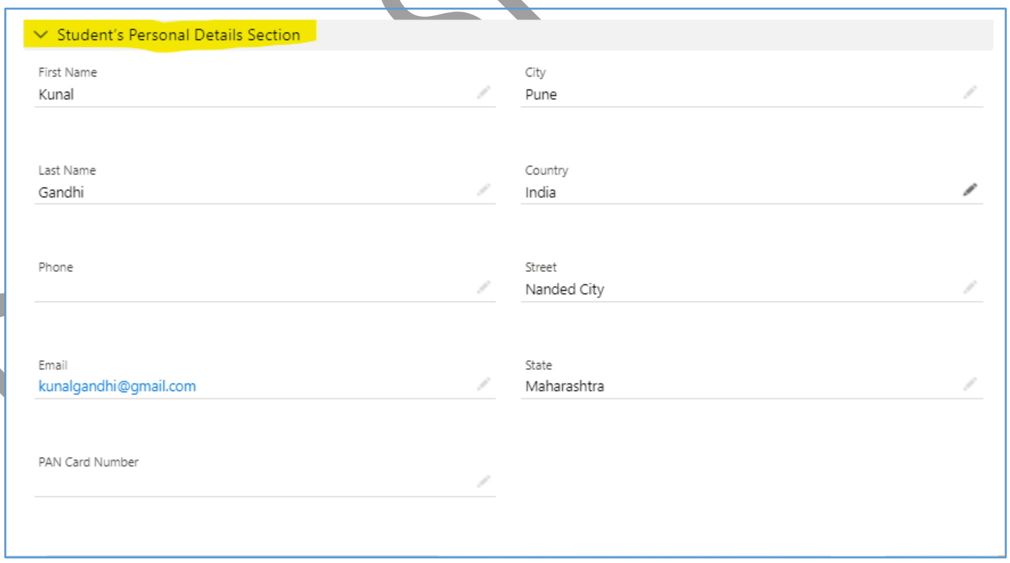
(ii) Trainer's Professional Details



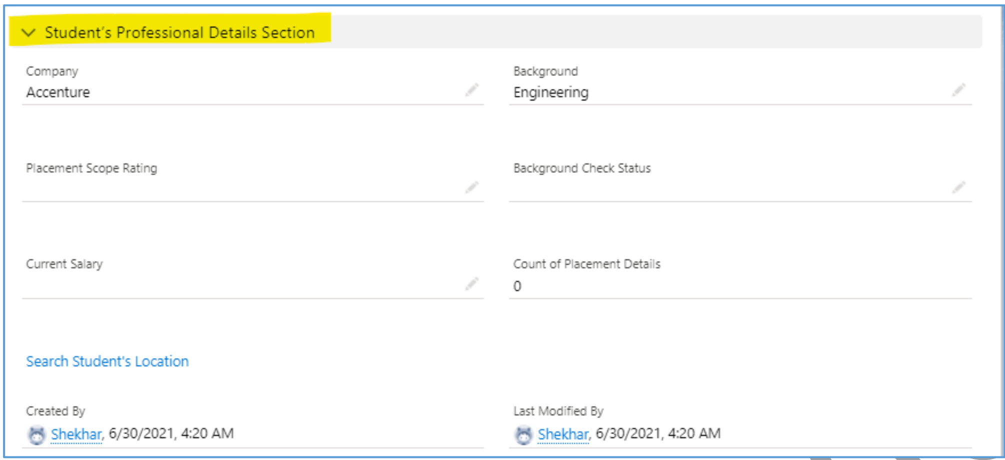
(5).Client wants three Sections in "Student Master "page.

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

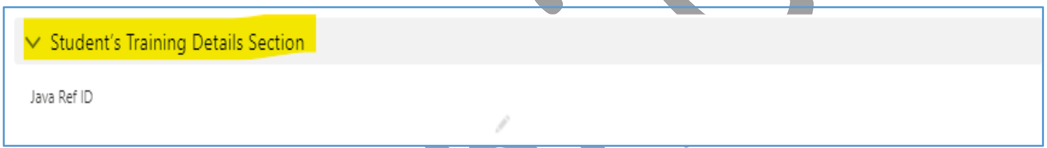
(i) Student's Personal Details



(ii) Student's Professional Details



(iii) Student's Training Details



PROJECT WORK: STORY 22

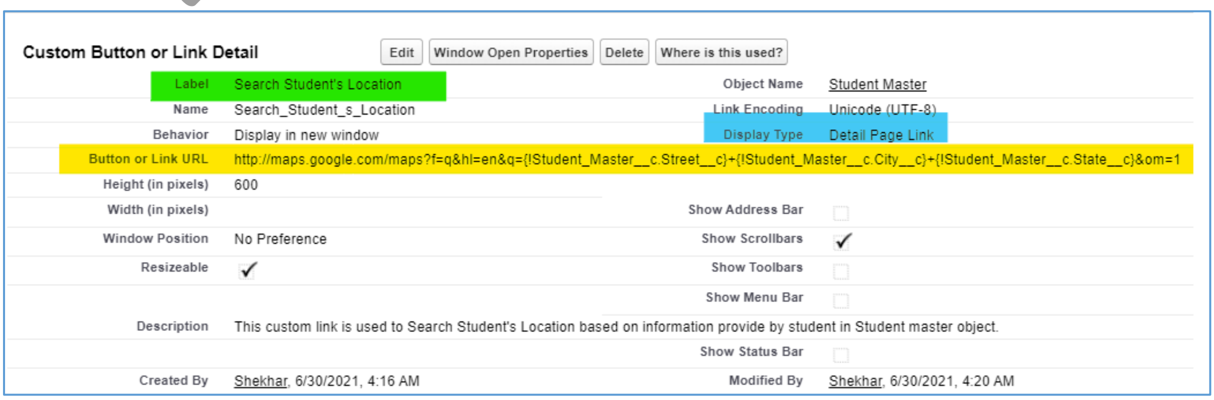
Client wants quick way to make better processing of candidate.

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

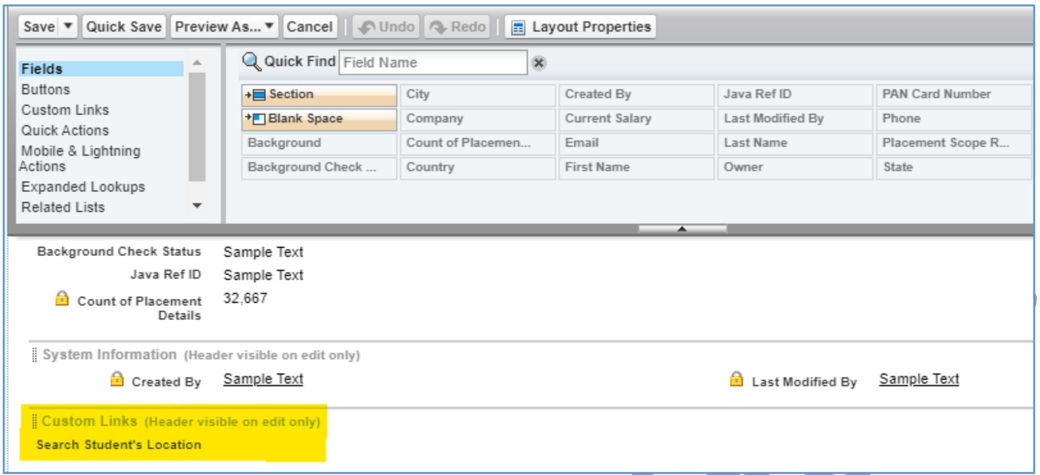
This can be achieved by creating "Custom Links" on Record Page of 'Student Master' object, which will open Map automatically with Location based on Students provided field.

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

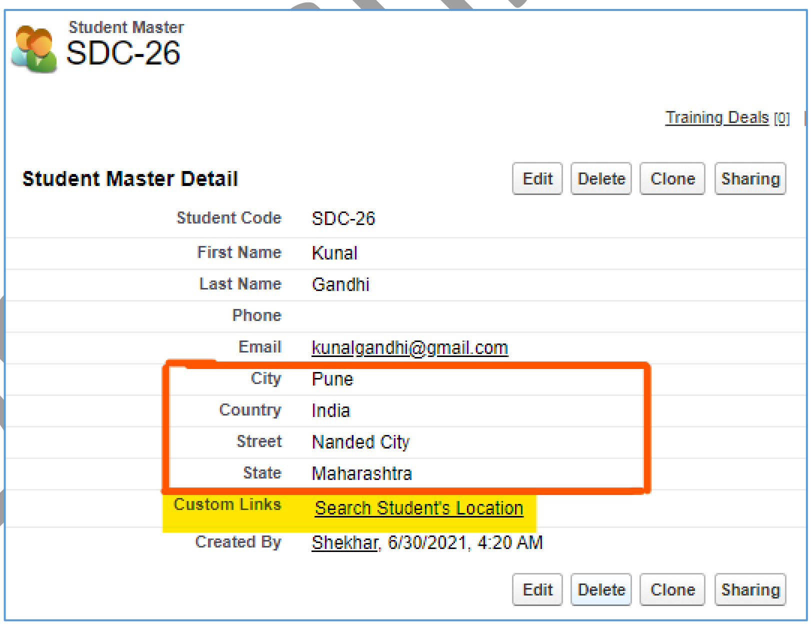
Link Name	Search Student's Location
Display Type	Detail Page Link
Behaviour	Display in New Window
Content Source	URL
URL Added	http://maps.google.com/ maps?f=q&hl=en& q={!Student_Master__c.Street__c} +{!Student_Master__c.City__c} +{!Student_Master__c.State__c}&om=1
Error Message	Sorry!!! You are not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



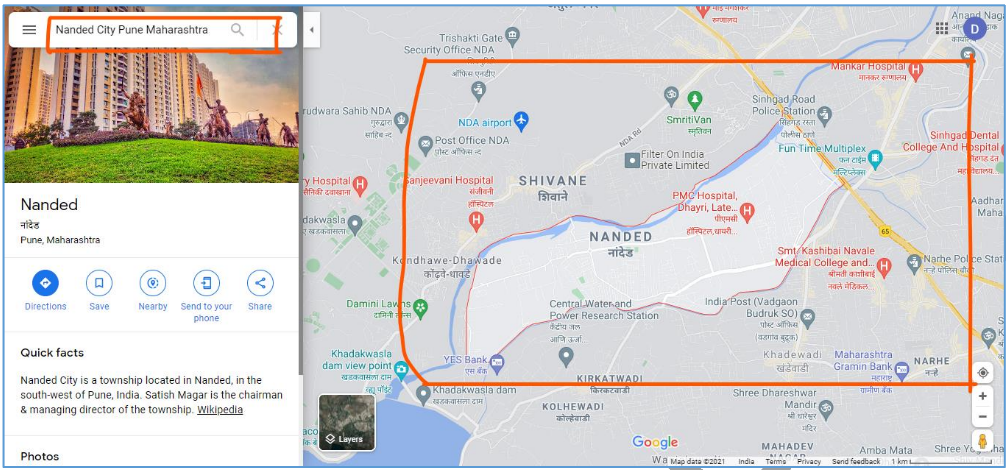
(2).Add Custom Link in 'Student Master' object Page layout.



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



(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

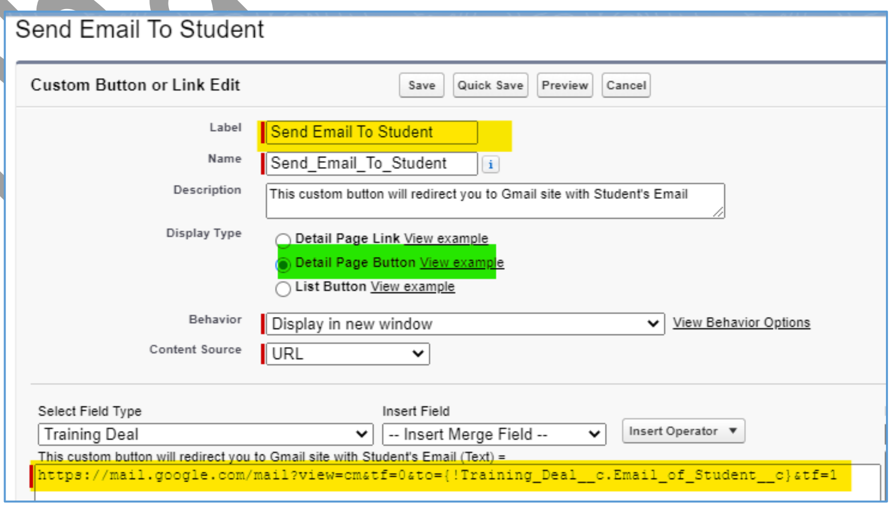
Client wants quick way to make better processing of candidate.

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

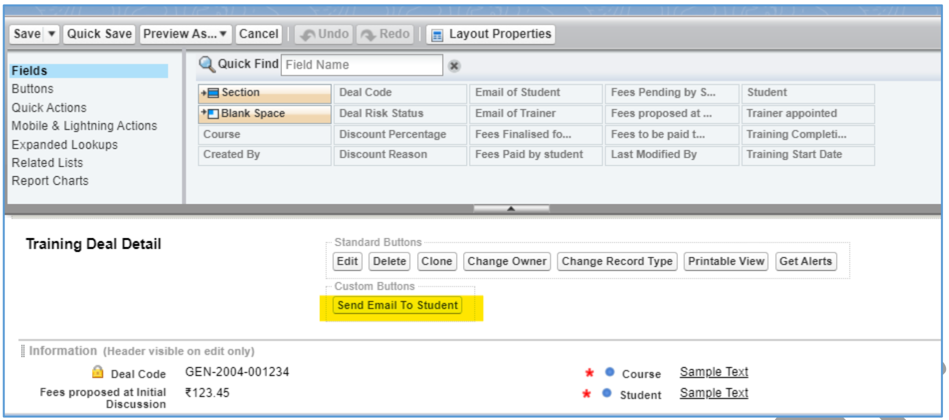
This can be achieved by creating "Custom Button" on Record Page of "Training Deal "object, which will open Gmail automatically with Email of concern person auto populated.

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

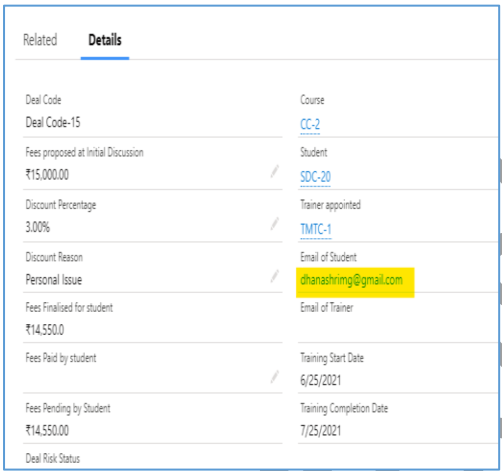
Button Name	Send Email To Student
Display Type	Detail Page Button
Behaviour	Display in New Window
Content Source	URL
URL Added	https://mail.google.com/mail?view=cm&tf=0&to={!Training_Deal__c.Email_of_Student__c}&tf=1

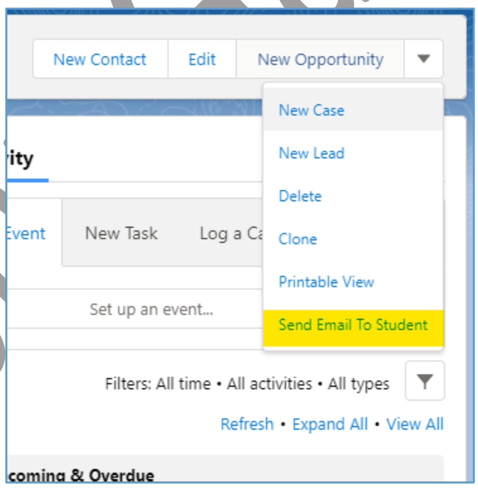


(2).Add Custom Button in Training Deal object Page layout.

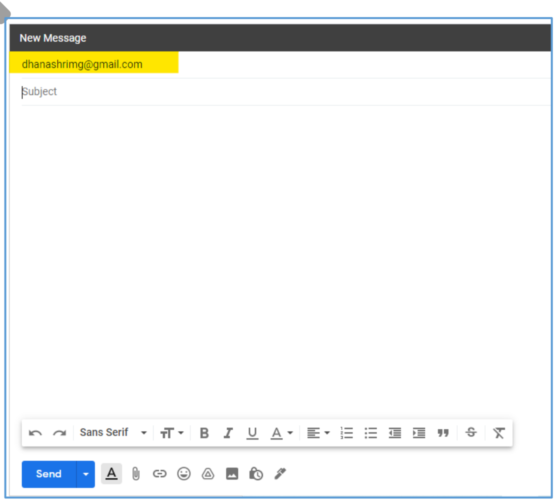


(3).Training deal records will have this button on Right hand side.





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



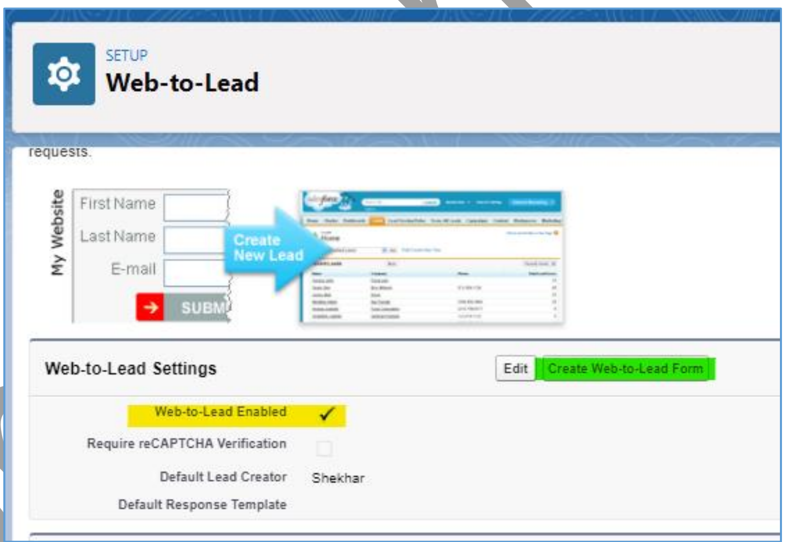
PROJECT WORK: STORY 24

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.

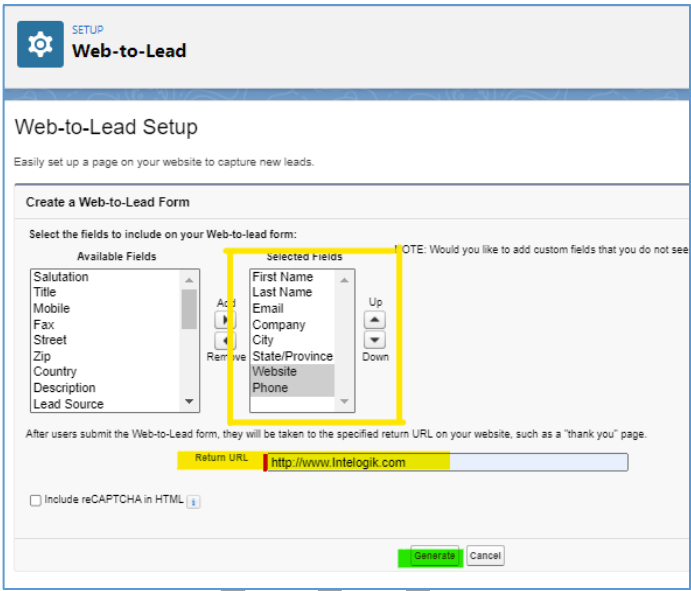
This can be achieved without coding and integration using Standard functionality called "WEB TO LEAD".

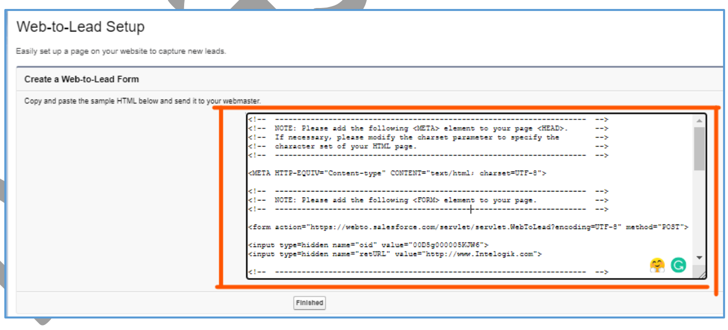
(1)We need to create Web-To-Lead form by going to Setup→Marketing (Web-To-Lead).



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

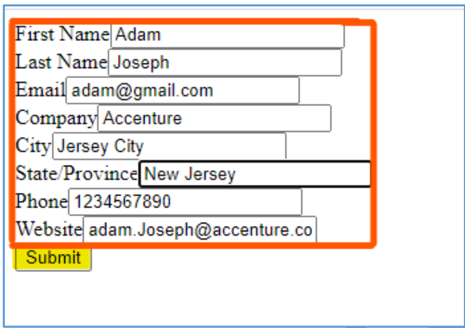
Click on “Generate” button so that it will generate Code.



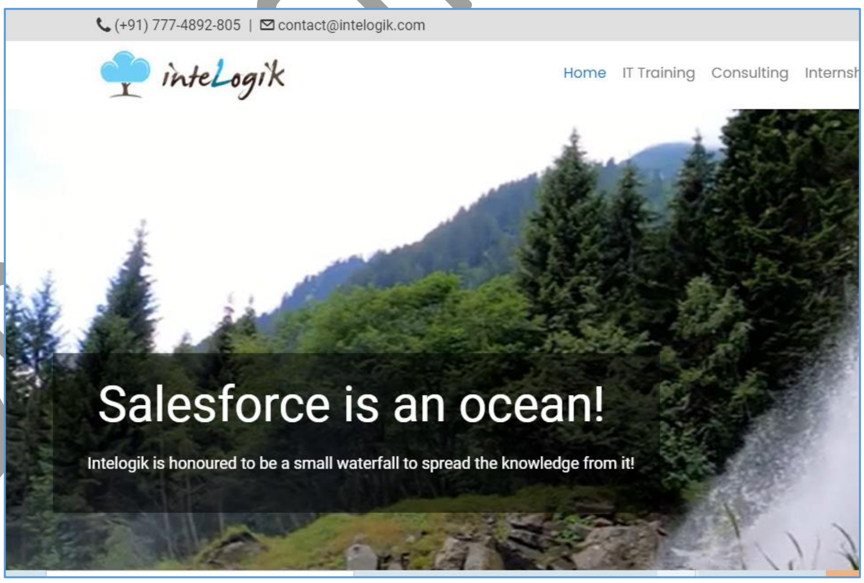


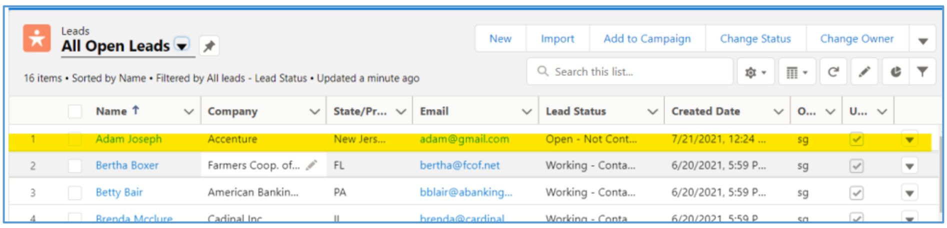
(3)Copy Generated Code and paste it in Notepad and save as HTML type.

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



(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.





PROJECT WORK: STORY 25

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

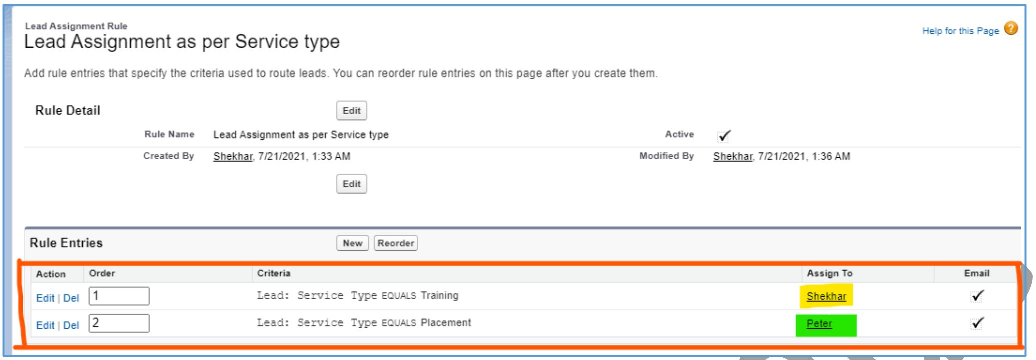
Client wants whenever Lead is coming for Service Type = 'Training' then it should be assigned to 'Shekhar' and Email should be sent regarding same.

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

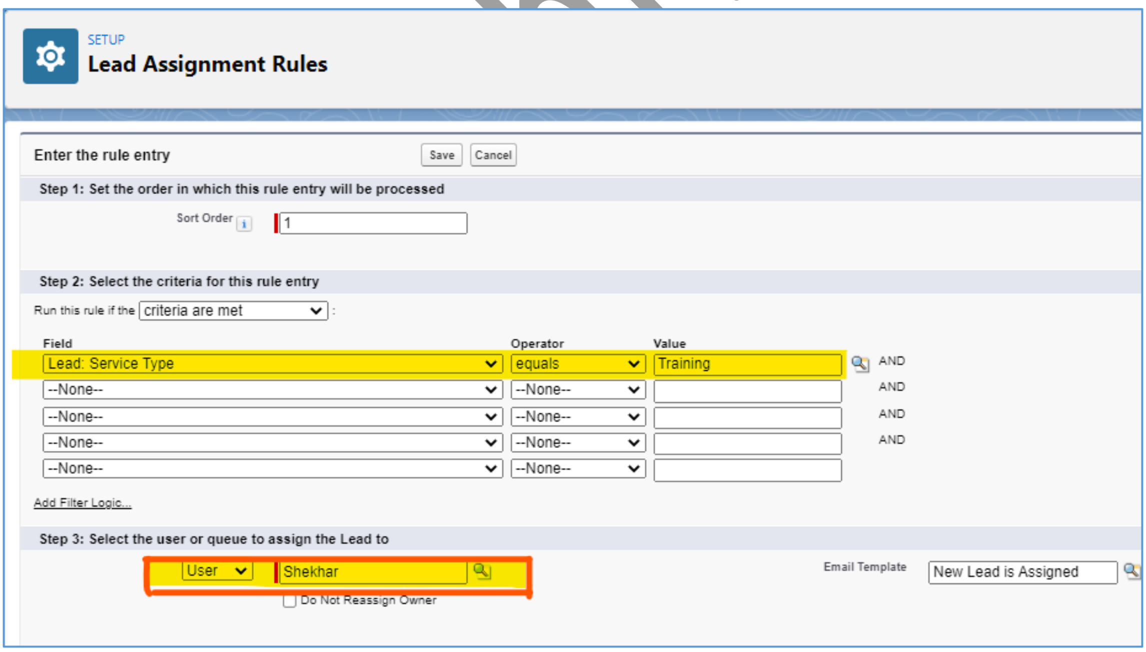
This can be achieved by using 'LEAD ASSIGNMENT RULE 'in Salesforce.

Lead Assignment Rule Name	Lead Assignment as per Service type
Rule Entries	(1) • Lead: Service Type EQUALS 'Training' • Lead Assigned To : 'Shekhar' • Email Template : New Lead is Assigned
	(2) • Lead: Service Type EQUALS 'Placement' • Lead Assigned To : 'Peter' • Email Template : New Lead is Assigned

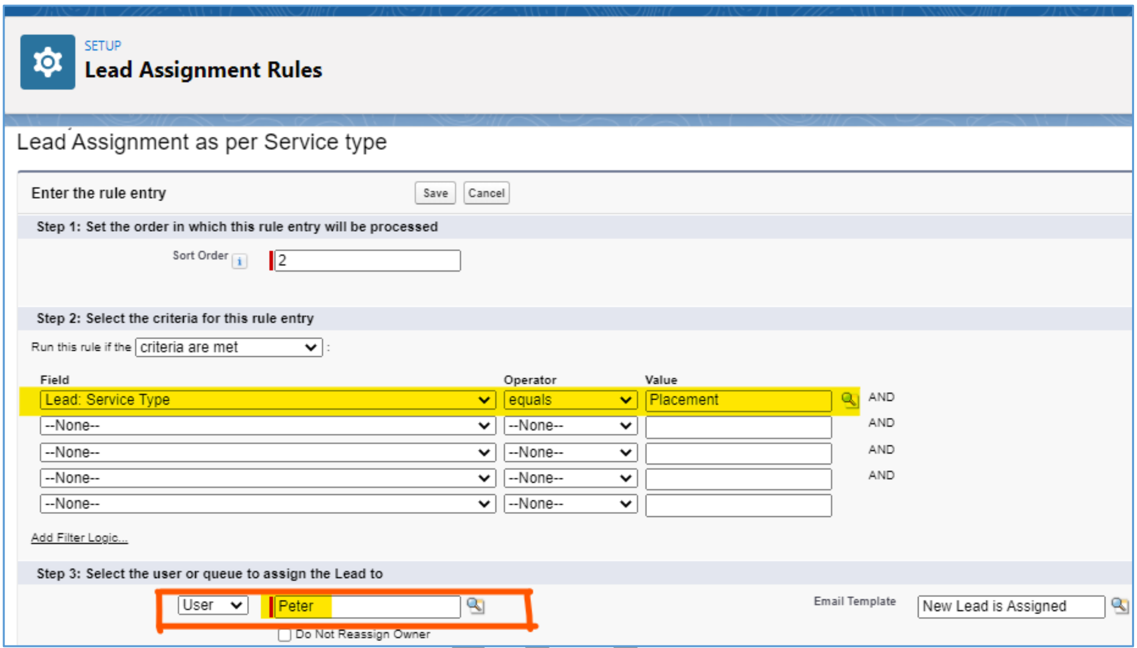
(1)Create Lead Assignment Rule.



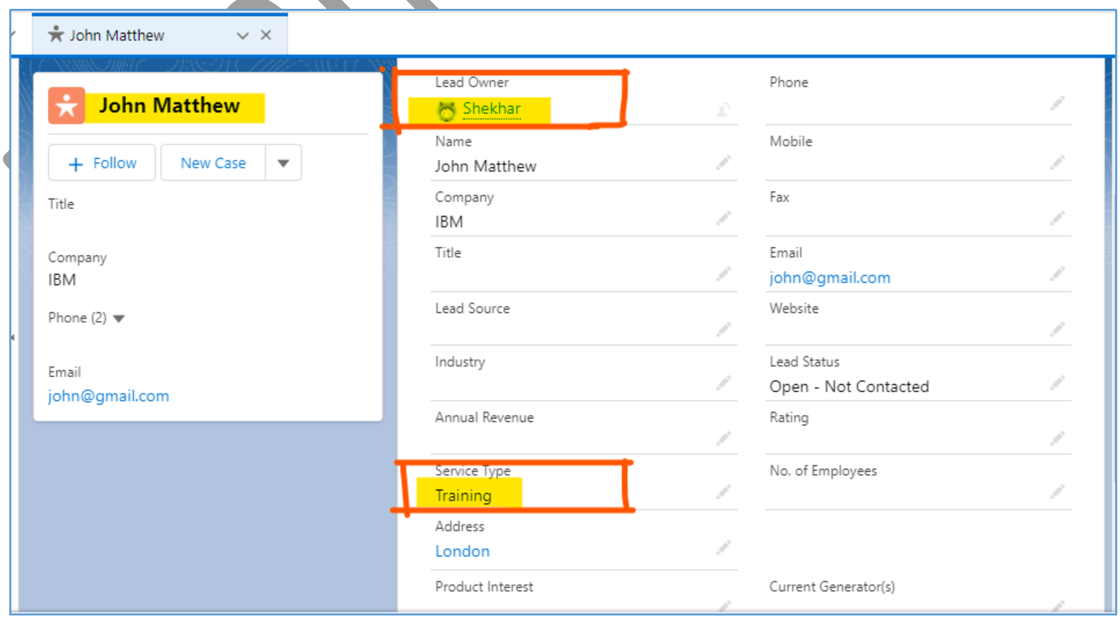
(2)Create rule Entry 1 which will meet condition i.e. lead: Service Type EQUALS 'Training' and Lead Assigned To: 'Shekhar'

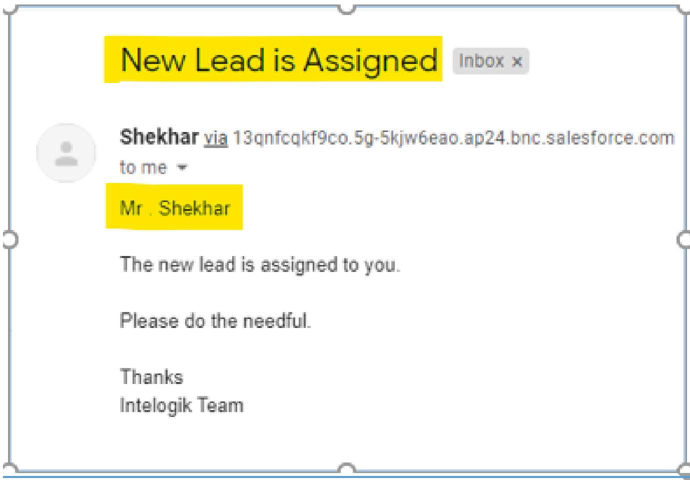


(3)Create rule Entry 2 which will meet condition i.e. lead: Service Type EQUALS 'Placement' and Lead Assigned To: 'Peter'

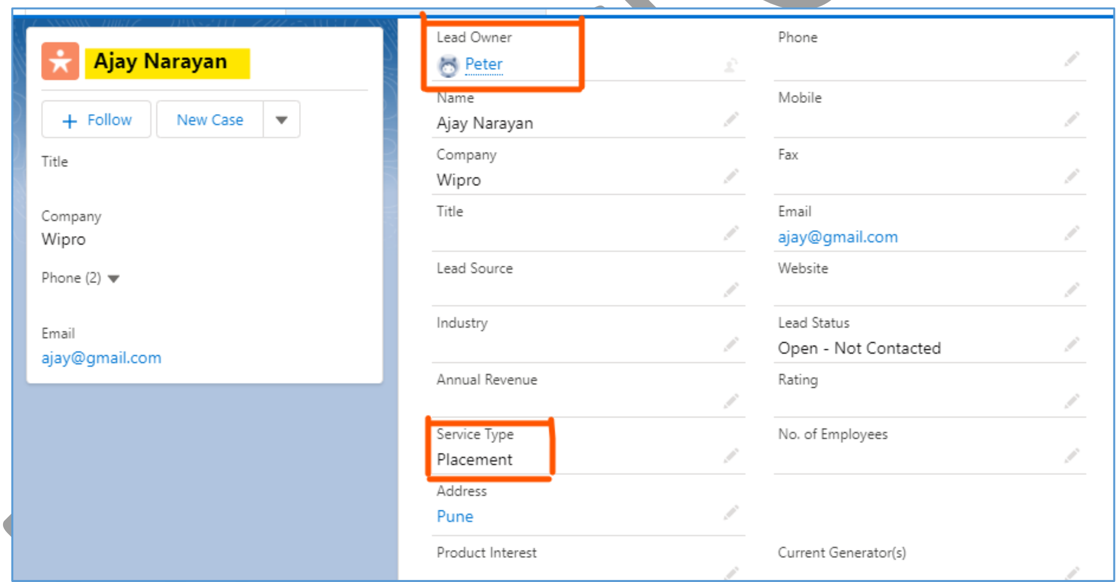


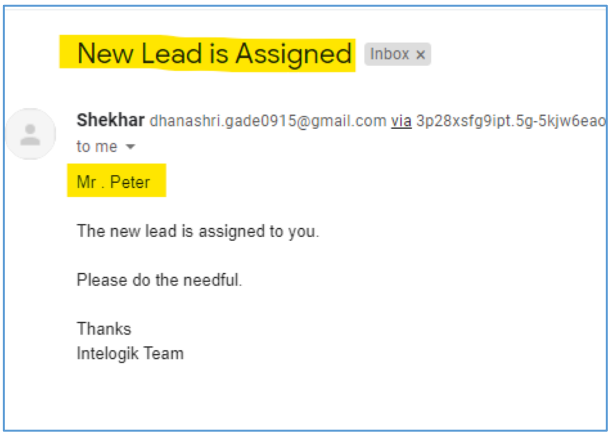
(4)When lead is created with Service Type: Training, it will automatically assigned to 'Shekhar' and Email will be sent regarding it.





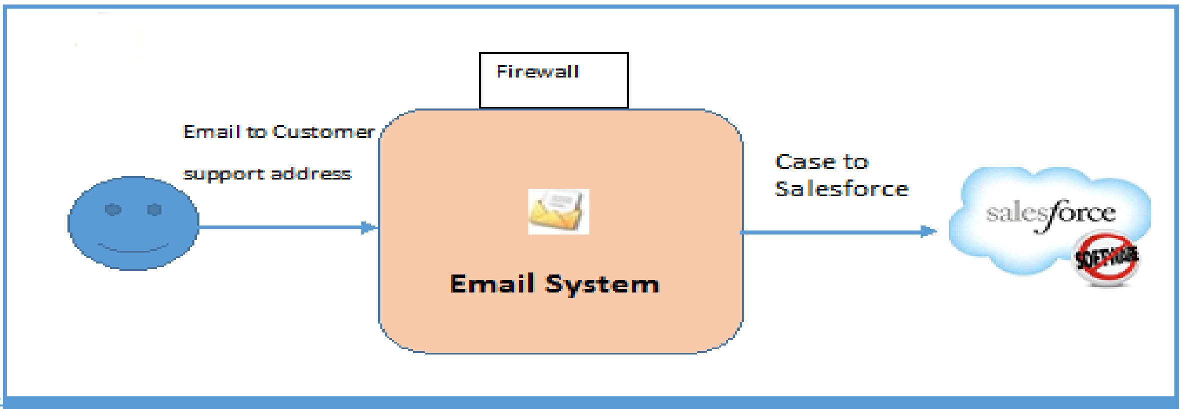
(5)When lead is created with Service Type: Placement, it will automatically assigned to ‘Peter’ and Email will be sent regarding it.





PROJECT WORK: STORY 27

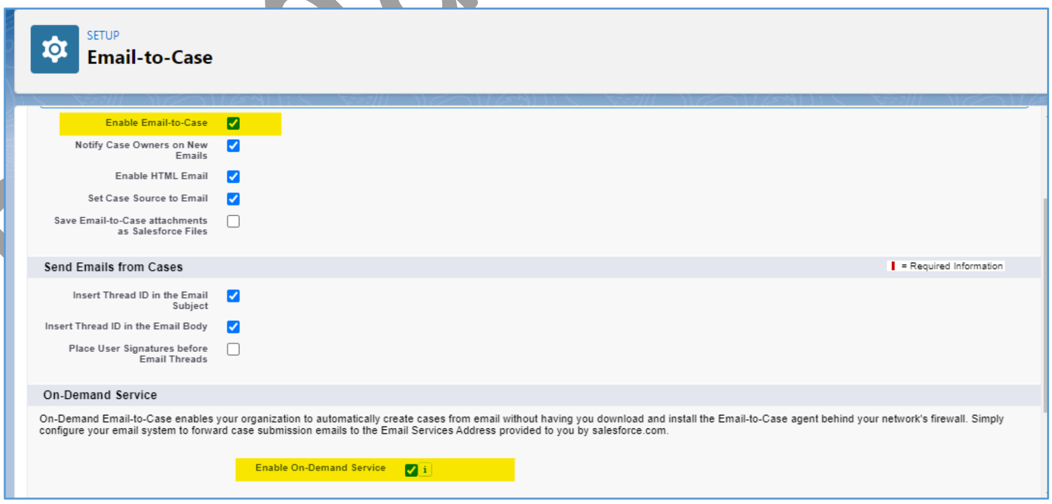
Client wants to create Issue/Case in Salesforce org when Email is send from Student regarding Service provided by Company.



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.



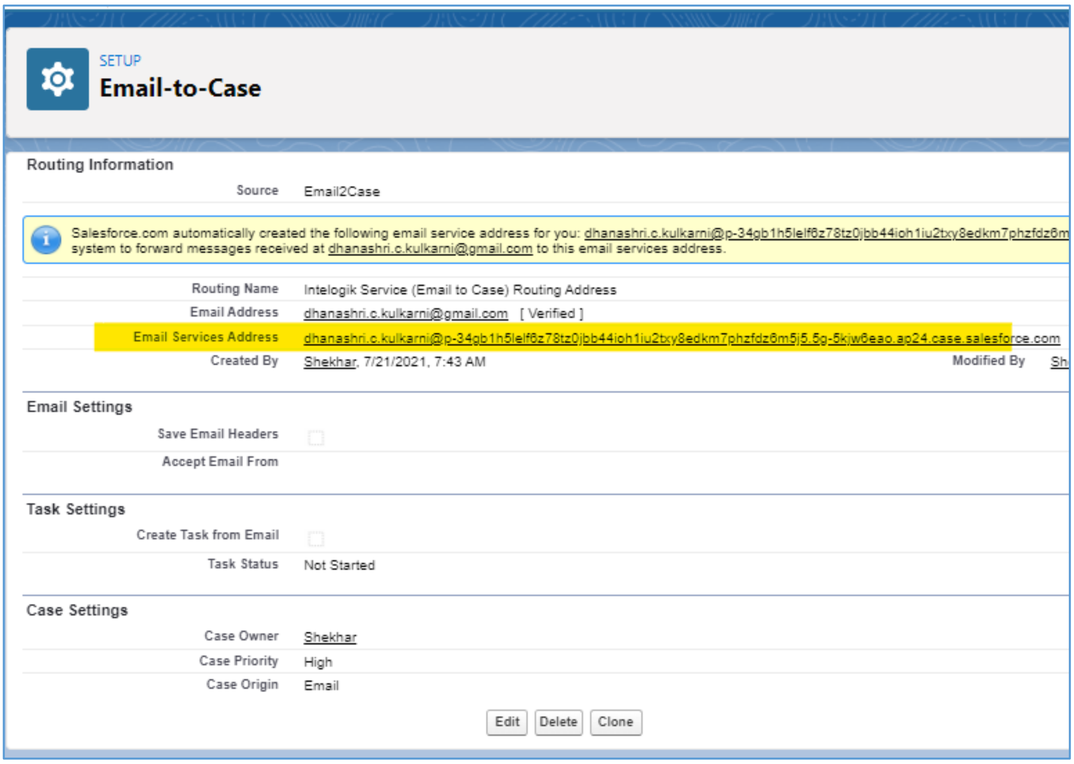
(2)Select Email2Case and Add Routing Addresses for it. Click on New.

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

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.

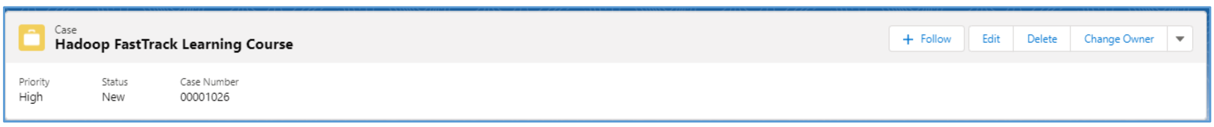


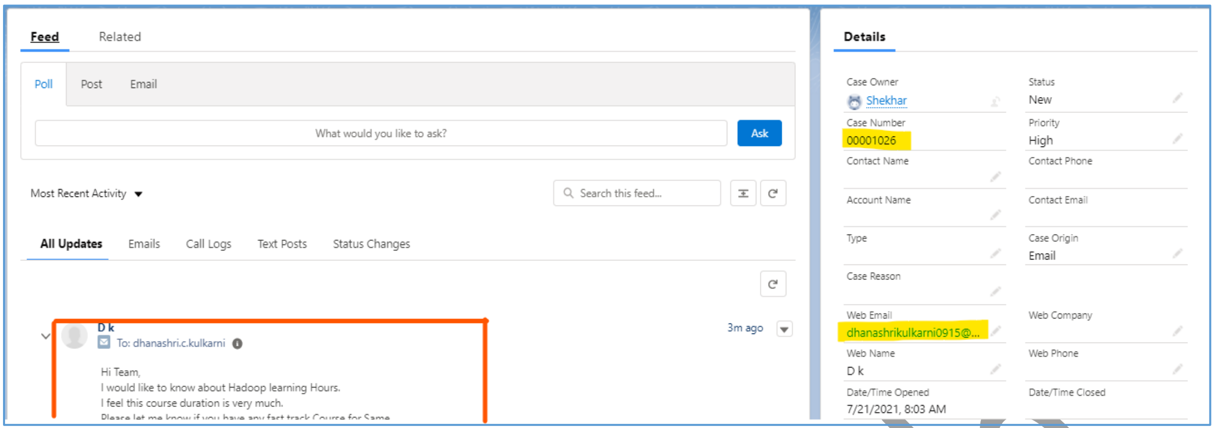
(3)After Email verification is done, Salesforce will provide Modified long Email Id.

- Email Services Address: dhanashri.c.kulkarni@p-34gb1h5lelf6z78tz0jbb44ioh1iu2txy8edkm7phzfdz6m5j5.5g-5kjw6eao.ap24.case.salesforce.com

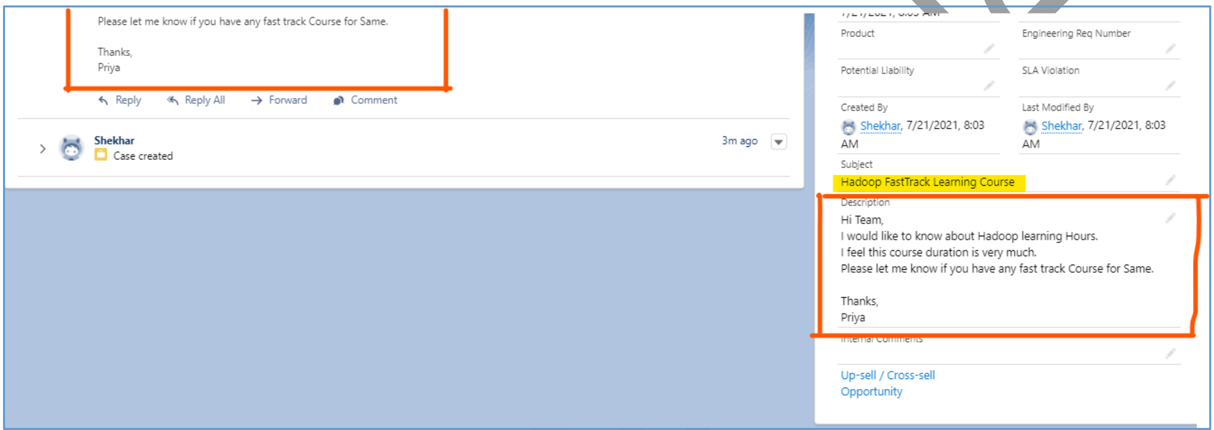
(4)This Email Address should be given to Customer to send Email.

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





Feed
Related
Poll
Post
Email
What would you like to ask?
Ask
Most Recent Activity
Search this feed...
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.
Details
Case Owner
Shekhar
Status
New
Case Number
00001026
Priority
High
Contact Name
Contact Phone
Account Name
Contact Email
Type
Case Origin
Email
Case Reason
Web Email
dhanashrikulkarni0915@...
Web Company
Web Name
D k
Web Phone
Date/Time Opened
7/21/2021, 8:03 AM
Date/Time Closed



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
Product
Engineering Req Number
Potential Liability
SLA Violation
Created By
Shekhar, 7/21/2021, 8:03 AM
Last Modified By
Shekhar, 7/21/2021, 8:03 AM
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 Comments
Up-sell / Cross-sell Opportunity

PROJECT WORK: STORY 28

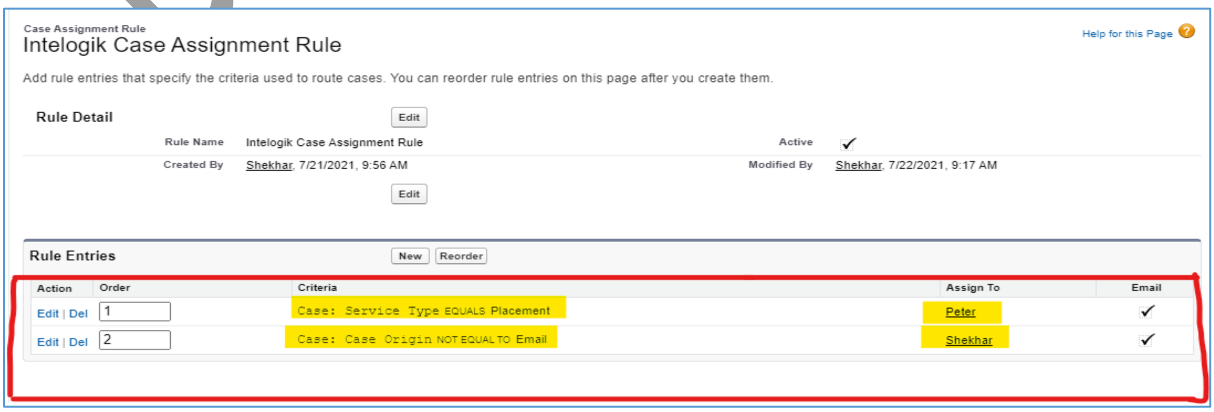
Client wants whenever Cases are created Manually, Email should be sent to CEO and whenever service type = Placement, Case Owner should be 'Peter'.

Both Shekhar and Peter should get email.

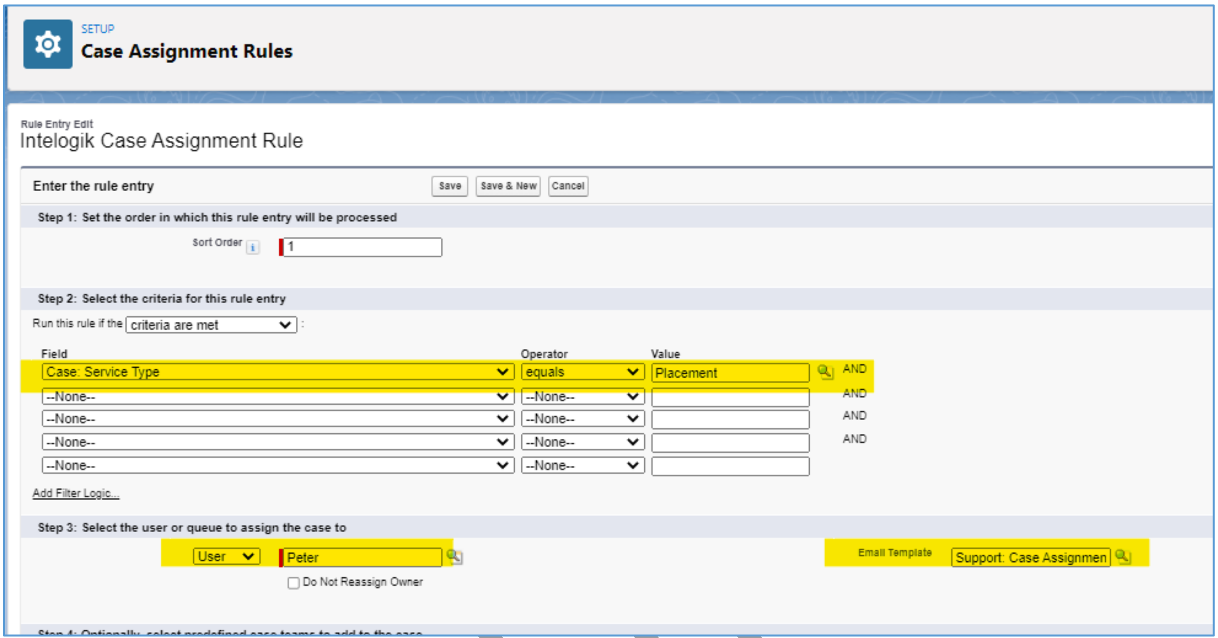
This can be achieved by using 'Case Assignment Rule' Salesforce.

Case Assignment Rule Name	Intelogik Case Assignment Rule
Rule Entries	(1) • Case: Service Type EQUALS Placement • Case Assigned To : 'Peter' • Email Template : (Support: Case Assignment Notification)
	(2) • Case: Case Origin <> Email • Case Assigned To : 'Shekhar' • Email Template : (Support: Case Created (Phone Inquiries))

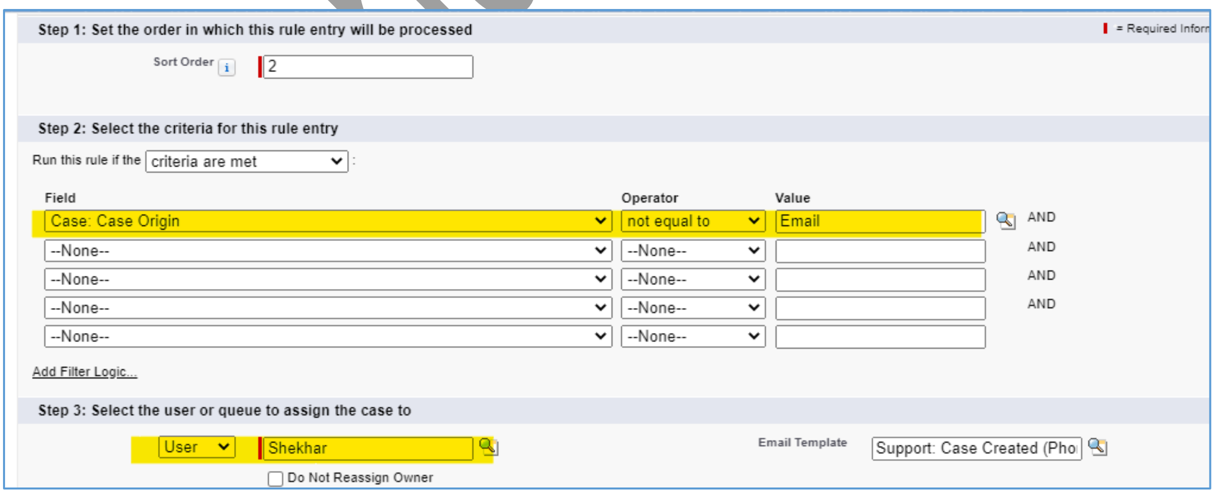
(1)Create Case Assignment Rule.



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



(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.



(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.

PROJECT WORK: STORY 29

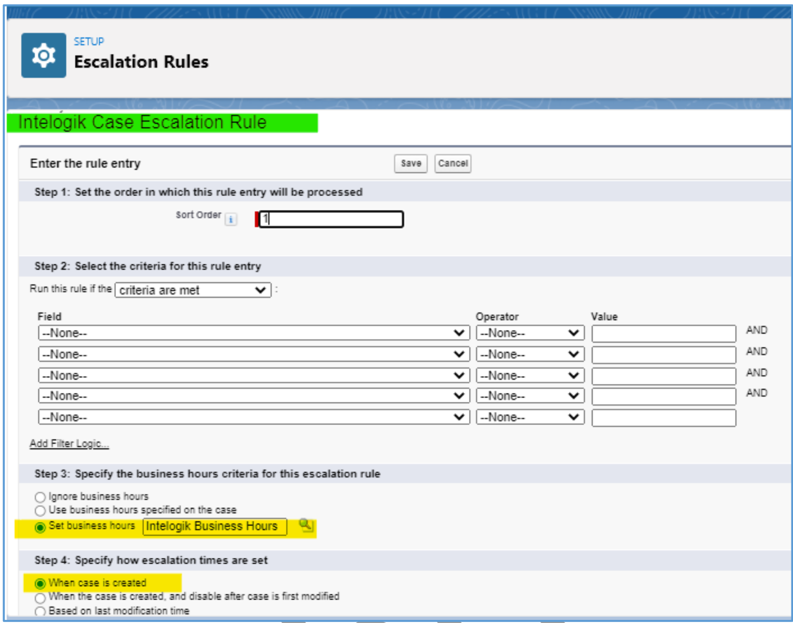
Client wants to as soon as case is created, it should be resolved by Case Owner within 3 Hours otherwise it should be transferred to senior person who has access to Case object.

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

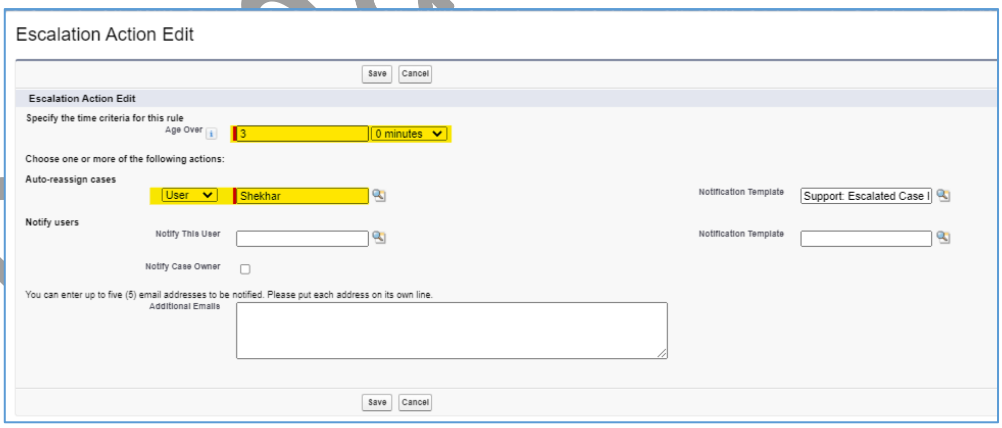
This can be achieved using Case-Escalation Rule.

Sr No.		
1.	Case Escalation Name	Intelogik Case Escalation Rule
2.	Rule Entries	(1)Rule Entry : • Set order : 1 • Specify Criteria for Rule entry : • Specify Business Hours: Intelogik Business Hours. • Specify how escalation times are set: When Case is created. (2)Escalation Actions : • Specify the time criteria for this rule : 3 hours • Auto-reassign cases :USER (Shekhar)

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



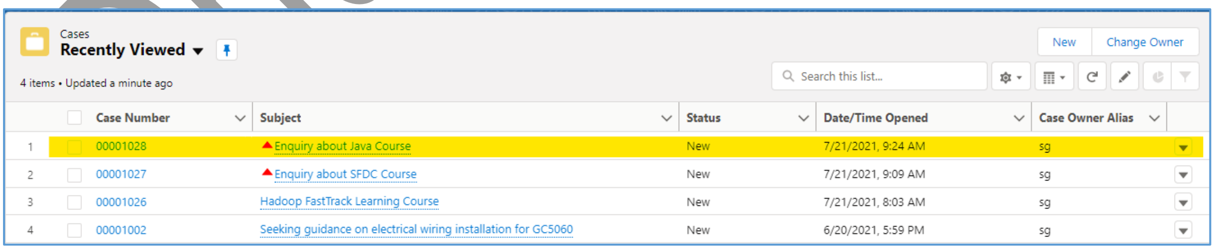
(2)Create new Escalation Actions.



(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.

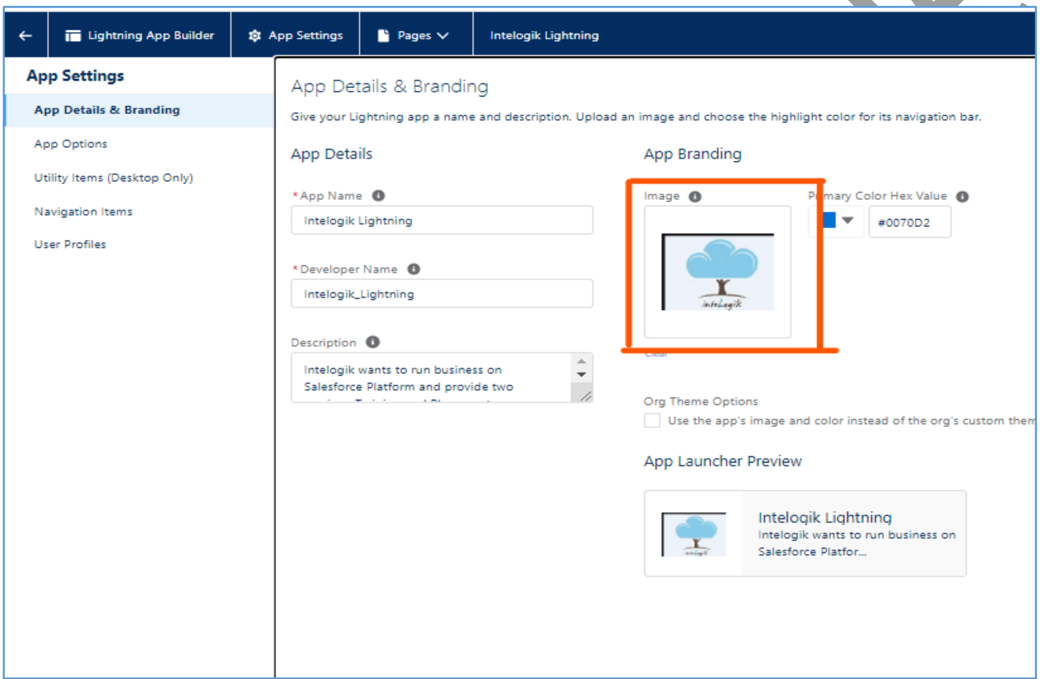
(4)This case is escalated after 3 hours when Case Owner: Peter did not Resolved it.



PROJECT WORK: STORY 30

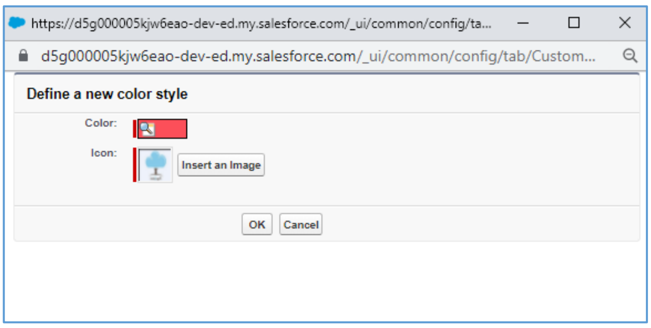
Client wants to use Intelogik Logo in salesforce for branding purpose. Training Deal object should have Intelogik Logo.

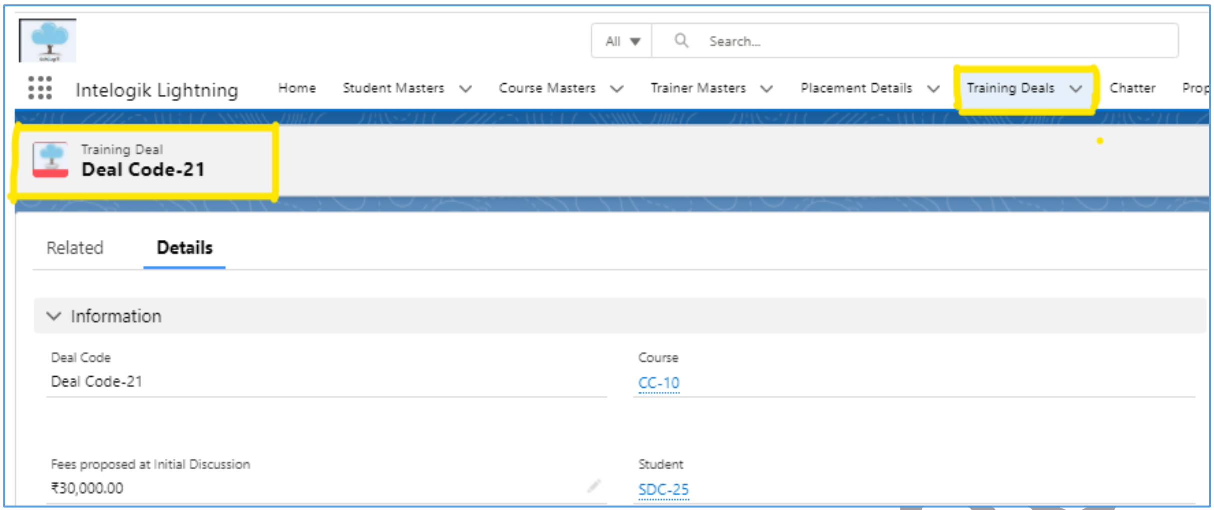
(1)To add logo to Intelogik app, Go to App Launcher→Intelogik Lightening→Edit→Select Logo from local resource→Upload.



(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.




All
Search...
Intelogik Lightning
Home
Student Masters
Course Masters
Trainer Masters
Placement Details
Training Deals
Chatter
Training Deal
Deal Code-21
Related
Details
Information
Deal Code
Deal Code-21
Course
CC-10
Fees proposed at Initial Discussion
₹30,000.00
Student
SDC-25

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,

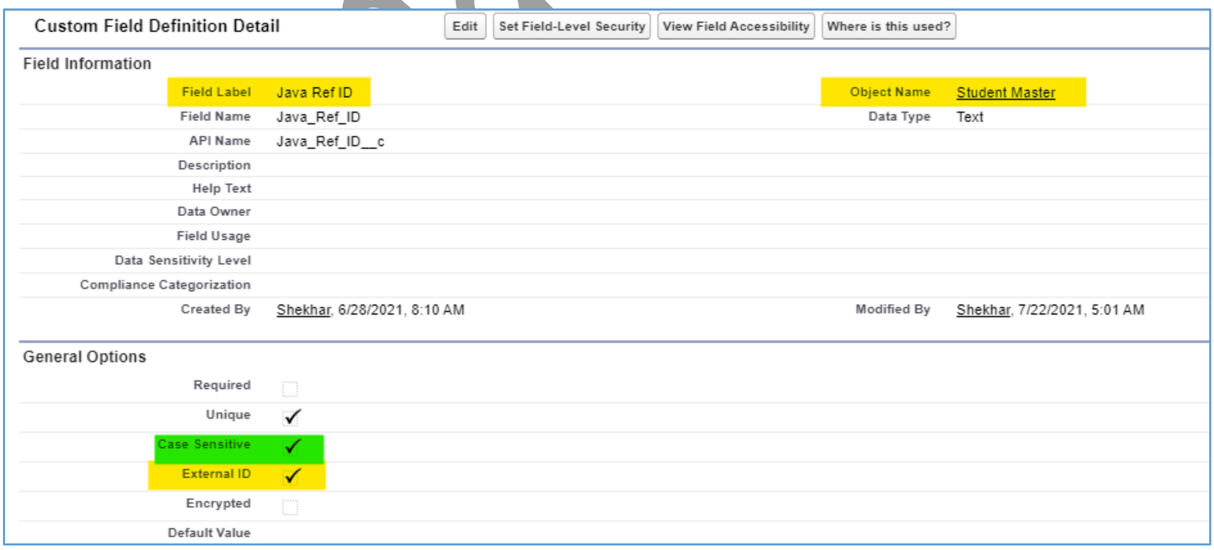
If any record is present, then it should be overwritten and if record is not present then create new record.

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.

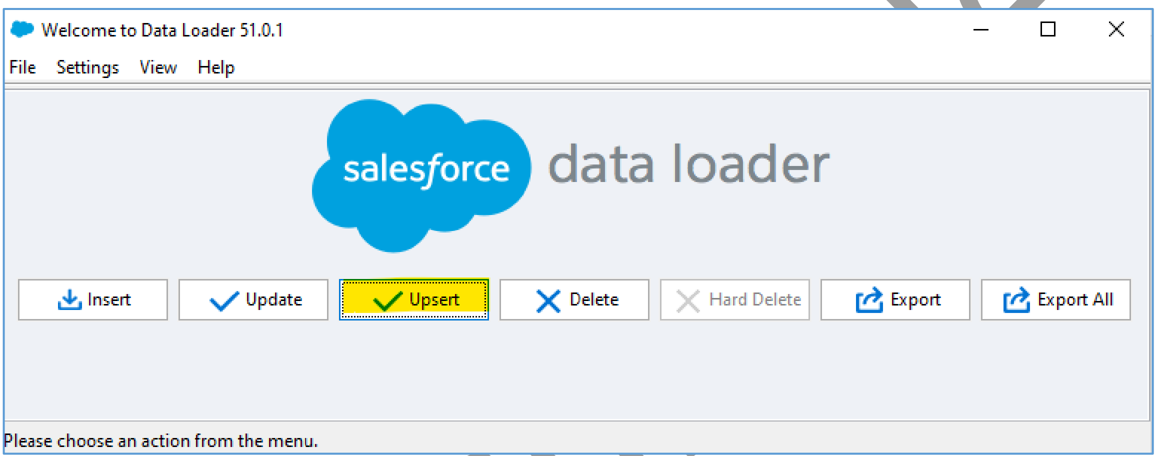
(1)Create Field in Student Master Object: Java Ref ID

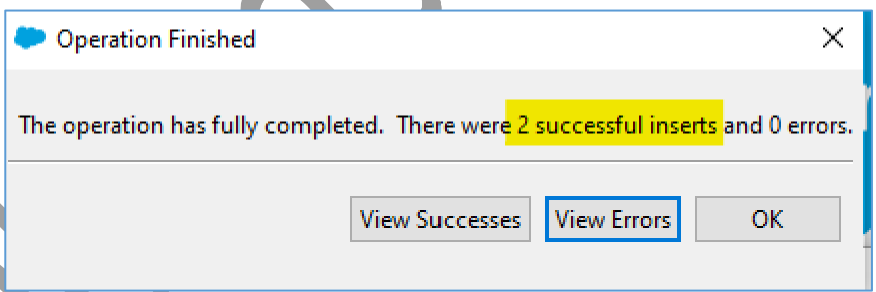


(2)Load (File 1 Jan) data in 'Student Master' using Data Loader given by ABCD.Com company.

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.

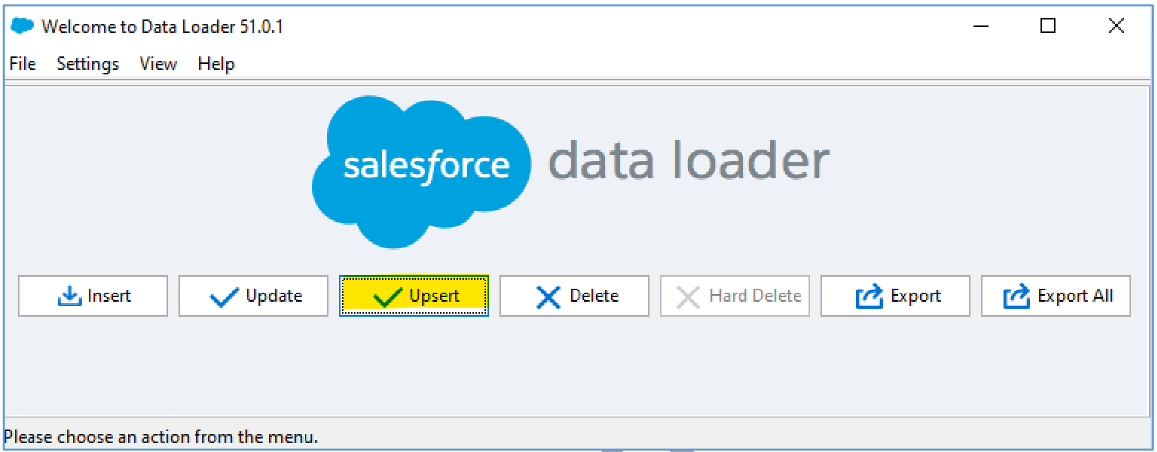




Successfully entered 2 records in Salesforce.

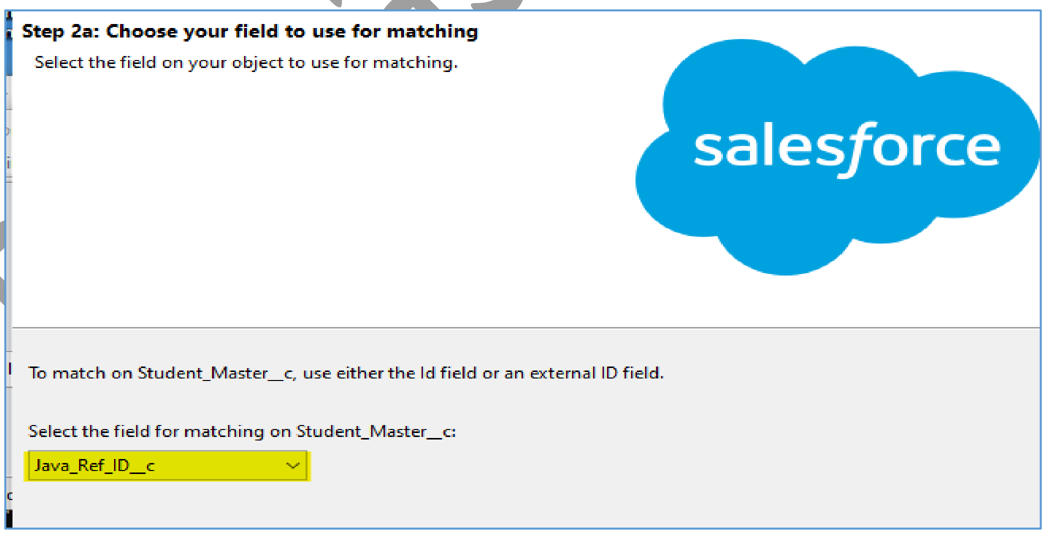
(3)Load (File 2 Feb) data in 'Student Master' using Data Loader given by ABCD.Com company.

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

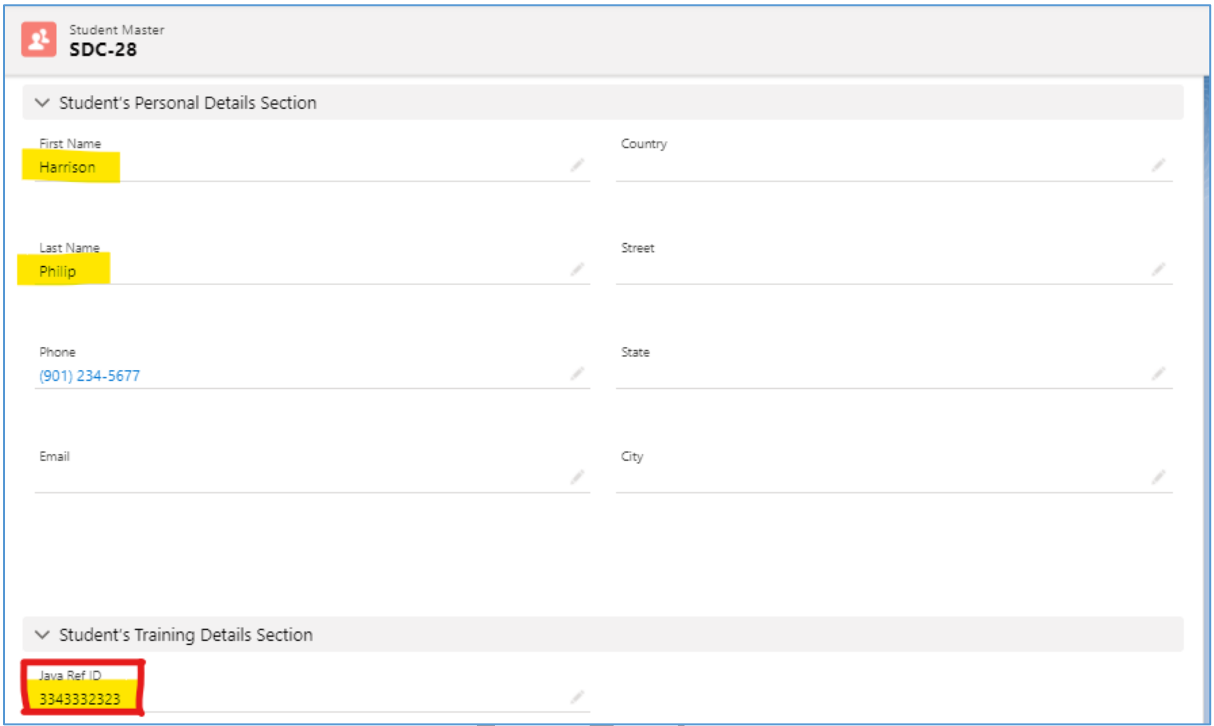


This time Data Loader will ask for Either Id or External Id to match to Object.

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



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



PROJECT WORK: STORY 32

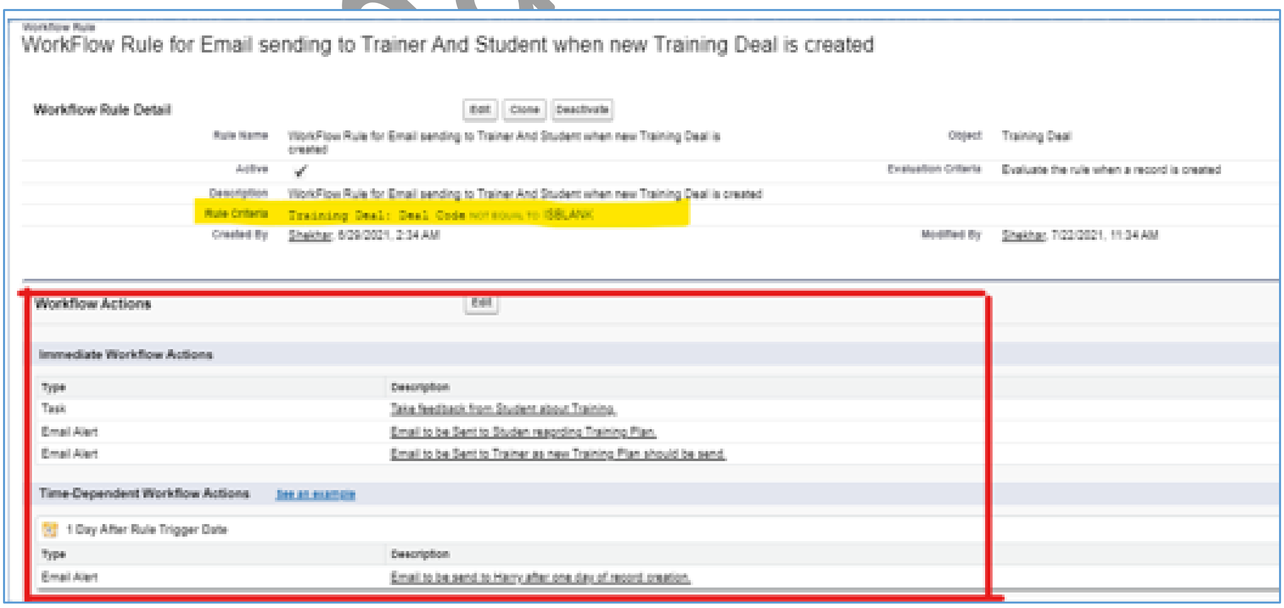
Client wants all workflow rules should be converted into Process Builder.

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	• Task • Email Alert • Scheduled Email Alert



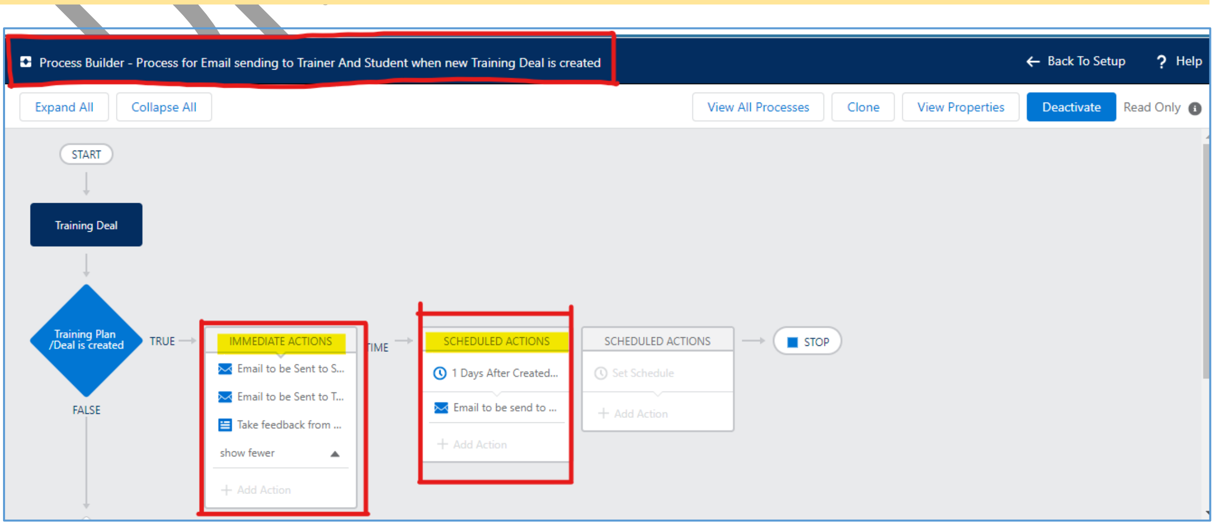
All these criteria and actions are added in Process Builder.

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	• 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	• 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

```
Public class DisplayStudentRecords{

    public List<Student_Master__c> StudentRecords {get;set;}

    Public DisplayStudentRecords(){

        StudentRecords = [SELECT    First_Name__c,  Last_Name__c,Company__c,City__c,Phone__c FROM Student_Master__c LIMIT 100];

    }

}
```

- Visualforce Page Name: DisplayStudentRecords VF Page

DisplayStudentRecords_VF_Page.vfp

Preview API Version: 52

```
<apex:page controller="DisplayStudentRecords" >
    <apex:form >
        <apex:pageBlock title="Student's Record" >
                <apex:pageBlockTable value="{!StudentRecords}" var="student" >
                    <apex:column value="{!student.First_Name__c}"/>
                    <apex:column value="{!student.Last_Name__c}"/>
                    <apex:column value="{!student.Company__c}"/>
                    <apex:column value="{!student.City__c}"/>
                    <apex:column value="{!student.Phone__c}"/>
                </apex:pageBlockTable>
        </apex:pageBlock>
    </apex:form>
</apex:page>
```

- 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

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

```
public class WrapperClassOfTrainingDeal {

    public List<WrapperClass> ListWrapper { get; set; }

    public WrapperClassOfTrainingDeal(){

        List<Training_Deal__c> listOfDealRecords = [Select Name,Course__c,Trainer_appointed__r.First_Name__c, Trainer_appointed__r.Last_Name__c,
                                                    Trainer_appointed__r.Education__c FROM Training_Deal__c LIMIT 1000];

        if(listOfDealRecords.size() >0){

            ListWrapper = new List<WrapperClass>();

            for(Training_Deal__c VarT : listOfDealRecords){

                ListWrapper.add(new WrapperClass(VarT));

            }
        }
    }
        public class WrapperClass{

        public Training_Deal__c VarTD { get; set; }

        public  WrapperClass(Training_Deal__c  VarTD){

            this.VarTD = VarTD;
        }
    }
}
```

- Visualforce Page Name: TrainingProgramRecordsDisplay_VFPage

WrapperClassOfTrainingDeal.apxc | TrainingProgramRecordsDisplay_VFPage.vfp

Preview | API Version: 52

```
<apex:page controller="WrapperClassOfTrainingDeal" >
    <apex:form>

        <apex:pageBlock id="pg">
            <apex:pageBlockSection title="Training Program Records" >
                <apex:pageBlockTable value="{!ListWrapper}" var="d">

                    <apex:column value="{!d.VarTD.Name}"></apex:column>
                    <apex:column value="{!d.VarTD.Course__c}"></apex:column>
                    <apex:column value="{!d.VarTD.Trainer_appointed__r.First_Name__c}"></apex:column>
                    <apex:column value="{!d.VarTD.Trainer_appointed__r.Last_Name__c}"></apex:column>
                    <apex:column value="{!d.VarTD.Trainer_appointed__r.Education__c}"></apex:column>

                </apex:pageBlockTable>
            </apex:pageBlockSection>
        </apex:pageBlock>

    </apex:form>
</apex:page>
```

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

Training Program Records

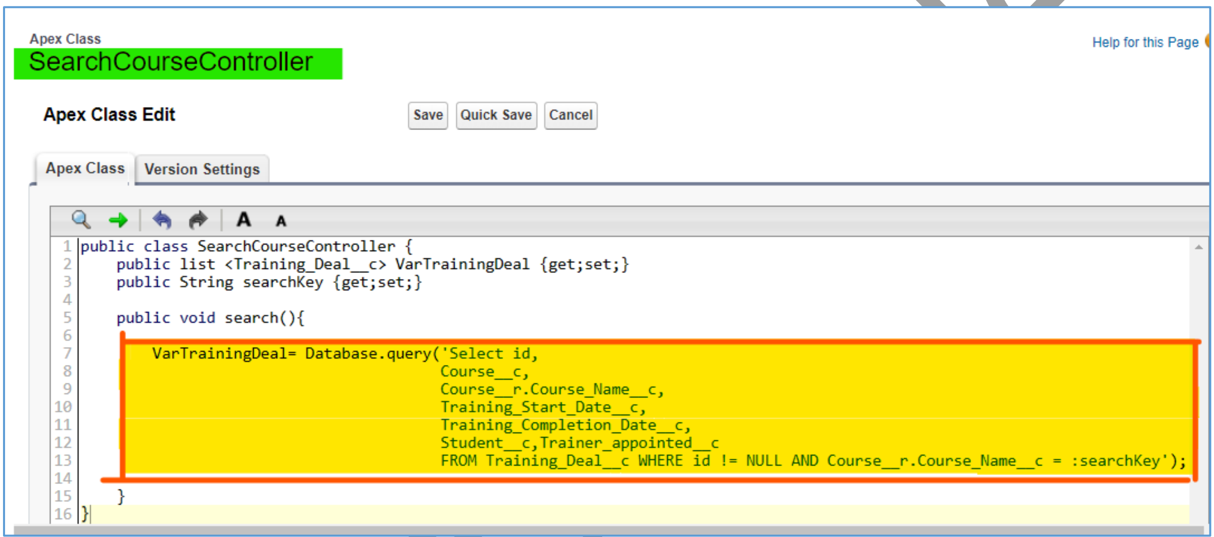
Deal Code	Course	First Name	Last Name	Education
Deal Code-15	CC-2	Ajay	Reddy	BE
Deal Code-29	CC-9	Vinit	Aggrawal	MCA
Deal Code-14	CC-2	Ajay	Reddy	BE
Deal Code-16	CC-2	Ajay	Reddy	BE
Deal Code-21	CC-10	Aditya	Narayan	ME
Deal Code-19	CC-2	Ajay	Reddy	BE
Deal Code-20	CC-10	Ajay	Reddy	BE
Deal Code-18	CC-16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

PROJECT WORK: STORY 35

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




```
public class SearchCourseController {
    public list <Training_Deal__c> VarTrainingDeal {get;set;}
    public String searchKey {get;set;}

    public void search(){

        VarTrainingDeal= Database.query('Select id,
                                        Course__c,
                                        Course__r.Course_Name__c,
                                        Training_Start_Date__c,
                                        Training_Completion_Date__c,
                                        Student__c,Trainer_appointed__c
                                        FROM Training_Deal__c WHERE id != NULL AND Course__r.Course_Name__c = :searchKey');

    }
}
```

- Visualforce Page Name: SearchCourse_VF_Page

SearchCourse_VF_Page.vfp *

Preview | API Version: 52

```
<apex:page Controller="SearchCourseController">
    <apex:form >
        <apex:pageBlock title="Search Result">
            <apex:pageBlockSection Columns="1">
                <apex:pageBlockSectionItem >
                    <apex:outputLabel value="Course to Search"/>
                    <apex:inputText value="{!searchKey}" />
                </apex:pageBlockSectionItem>
            </apex:pageBlockSection>
            <apex:pageMessages id="ShowMeassage" escape="False"></apex:pageMessages>

            <apex:pageBlockButtons>
                <apex:commandButton value="Search" action="{!search}" onclick="ShowMeassage" style="margin: 5px;"/>
            </apex:pageBlockButtons>

            <apex:pageBlockTable value="{!VarTrainingDeal}" var="deal">
                <apex:column value="{!deal.Course__r.Course_Name__c}"/>
                <apex:column value="{!deal.Training_Start_Date__c}"/>
                <apex:column value="{!deal.Training_Completion_Date__c}"/>
                <apex:column value="{!deal.Student__c}"/>
                <apex:column value="{!deal.Trainer_appointed__c}"/>
            </apex:pageBlockTable>
        </apex:pageBlock>
    </apex:form>
</apex:page>
```

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

Search Result Search

Course to Search: Dotnet

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

Search

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

```
public class SearchCourseController {
    public list <Training_Deal__c> VarTrainingDeal {get;set;}
    public String searchKey {get;set;}

    public void search(){

        VarTrainingDeal= Database.query('Select id,Course__c,Course__r.Course_Name__c,Training_Start_Date__c,Training_Completion_Date__c,Student__


        if(VarTrainingDeal.size() == 0){
            ApexPages.addmessage(new ApexPages.message(ApexPages.severity.Error,'No Record found with this Course!!!!!!!!!!0'));

        }
    }
}
```

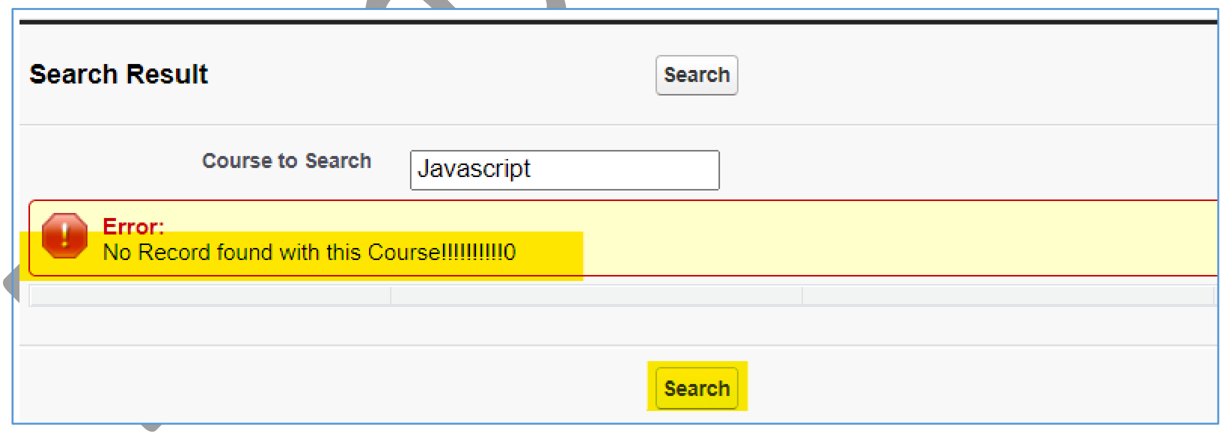
- Visualforce Page Name: SearchCourse_VF_Page

SearchCourseController.apxc | SearchCourse_VF_Page.vfp

Preview | API Version: 52

```
<apex:page Controller="SearchCourseController">
    <apex:form >
        <apex:pageBlock title="Search Result">
            <apex:pageBlockSection Columns="1">
                <apex:pageBlockSectionItem >
                    <apex:outputLabel value="Course to Search"/>
                    <apex:inputText value="{!searchKey}" />
                </apex:pageBlockSectionItem>
            </apex:pageBlockSection>
            <apex:pageMessages id="ShowMeassage" escape="False"></apex:pageMessages>
            <apex:pageBlockButtons >
                <apex:commandButton value="Search" action="{!search}" onclick="ShowMeassage" style="margin: 5px;"/>
            </apex:pageBlockButtons>

            <apex:pageBlockTable value="{!VarTrainingDeal}" var="deal">

                <apex:column value="{!deal.Course__r.Course_Name__c}"/>
                <apex:column value="{!deal.Training_Start_Date__c}"/>
                <apex:column value="{!deal.Training_Completion_Date__c}"/>
                <apex:column value="{!deal.Student__c}"/>
                <apex:column value="{!deal.Trainer_appointed__c}"/>
            </apex:pageBlockTable>
        </apex:pageBlock>
    </apex:form>
</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 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

```
public class DisplayDealRecordController {

    public List<Training_Deal__c> records {get; set;}

    public DisplayDealRecordController (){

        records = [SELECT Name,Course__r.name,Student__r.Name,
                   Trainer_appointed__r.Name,Fees_Finalised_for_student__c FROM Training_Deal__c];

    }
}
```

- Visualforce Page Name: SearchCourse_VF_Page

DisplayDealRecords.vfp | DisplayDealRecordController.apxc

Preview API Version: 52

```
<apex:page controller="DisplayDealRecordController">
    <apex:pageBlock title="Deal Details List">
        <apex:pageBlockTable value="{!records}" var="record">
            <apex:column >
                <apex:facet name="header">Deal Code</apex:facet>
                <apex:outputText value="{!record.Name}"/>
            </apex:column>
            <apex:column >
                <apex:facet name="header">Course</apex:facet>
                <apex:outputText value="{!record.Course__r.name}"/>
            </apex:column>
            <apex:column >
                <apex:facet name="header">Student</apex:facet>
                <apex:outputText value="{!record.Student__r.Name}"/>
            </apex:column>
            <apex:column >
                <apex:facet name="header">Trainer appointed</apex:facet>
                <apex:outputText value="{!record.Trainer_appointed__r.Name}"/>
            </apex:column>
            <apex:column >
                <apex:facet name="header">Fees Finalised for student</apex:facet>
                <apex:outputText value="{!record.Fees_Finalised_for_student__c}"/>
            </apex:column>
        </apex:pageBlockTable>
    </apex:pageBlock>
</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

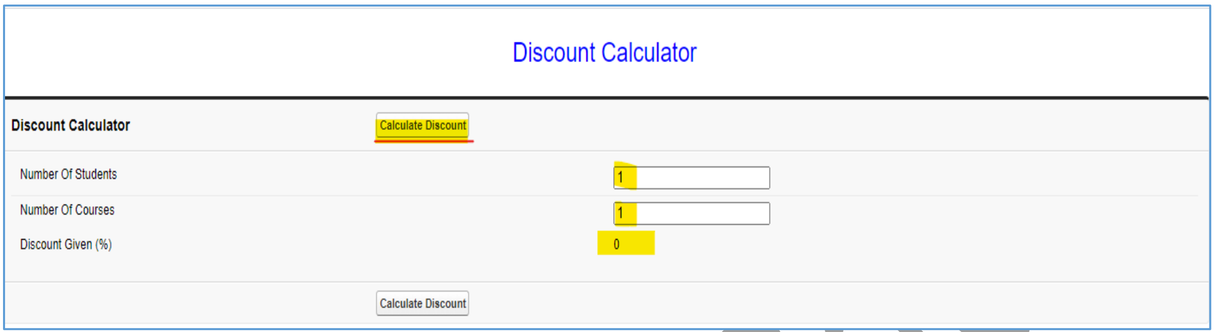
```
<apex:page >
    <apex:form id="frm">
        <style>
            #ct{
            text-align:center;
            font-size: x-large;
            }
        </style>

        <div id="ct">
            <h><p style="color:blue;">Discount Calculator</p></h>

        </div>
       <apex:pageBlock  title="Discount Calculator">
           <apex:pageBlockSection  columns="2" id="pbs">

               <apex:outputLabel >Number Of Students</apex:outputLabel>
                <apex:inputText value="StudentsCount" id="id1"/>

               <apex:outputLabel >Number Of Courses</apex:outputLabel>
                <apex:inputText  value="CourseCount" id="id2" />

           </apex:pageBlockSection>

           <apex:pageBlockButtons id="pbb" >
               <apex:commandButton value="Calculate Discount" action="{!CalculateDiscount}" />
           </apex:pageBlockButtons>

           <apex:pageBlockSection  columns="2" >

               <apex:outputLabel >Discount Given</apex:outputLabel>
              <apex:outputText value="discount" ></apex:outputText>

           </apex:pageBlockSection>
       </apex:pageBlock>
    </apex:form>
</apex:page>
```

- Apex Class(Controller) Name : DiscountCalculatorController

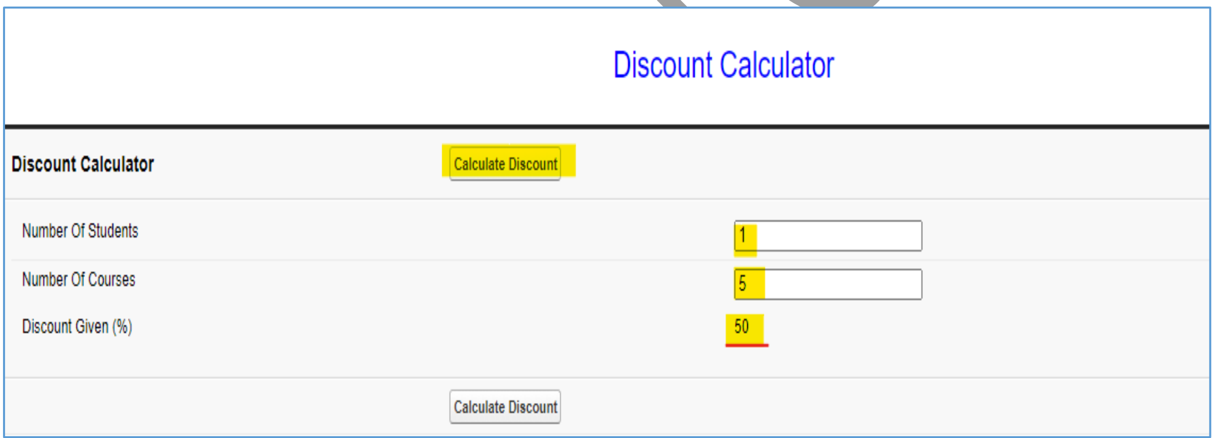
```
public class DiscountCalculatorController {

    //Declaration of Variables
    Public Integer StudentCount{get; set; }
    Public Integer CourseCount{get; set; }
    Public Integer discount{get; set; }

    //Declaration of Calculate Discount method
    Public void CalculateDiscount(){

        //Logic to calculate Discount for 1 Student and 1 Course
        if(StudentCount == 1 && CourseCount == 1 ){
          discount = 0;
        }
        //Logic to calculate Discount for 1 Student and Many Courses and Discount should not more than 60%
        if(StudentCount == 1 && CourseCount > 1 ){

            discount = 10 * (CourseCount);

            if(discount < =60){
                discount = 10 * (CourseCount);
            }else{
                discount = 60;
            }
        }
        //Logic to calculate Discount for Many Student and 1 Course and Discount should not more than 60%
        if(StudentCount > 1 && CourseCount == 1 ){

            discount = 15 * (StudentCount);

            if(discount < =60){
                discount = 15 * (StudentCount);
            }else{
                discount = 60;
            }
        }
        //Logic to calculate Discount for Many Students and Many Courses and Discount should not more than 60%
        if(StudentCount > 1 && CourseCount > 1 ){

            discount = (15 * (StudentCount)) + (10 * (CourseCount));

            if(discount < =60){
                discount = (15 * (StudentCount)) + (10 * (CourseCount));
            }else{
                discount = 60;
            }
        }
    }
}
```

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

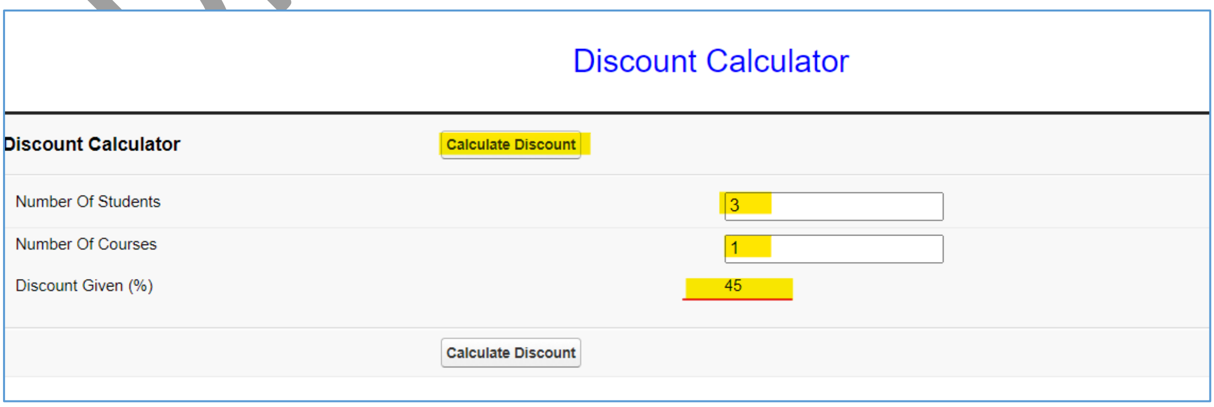
1) Discount for 1 Student and 1 Course



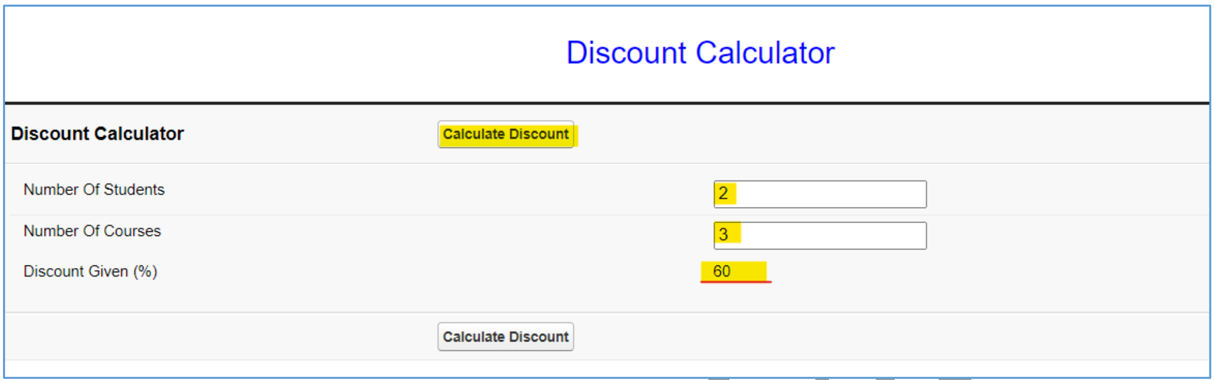
2) Discount for 1 Student and Many Courses and Discount should not be more than 60%



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



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

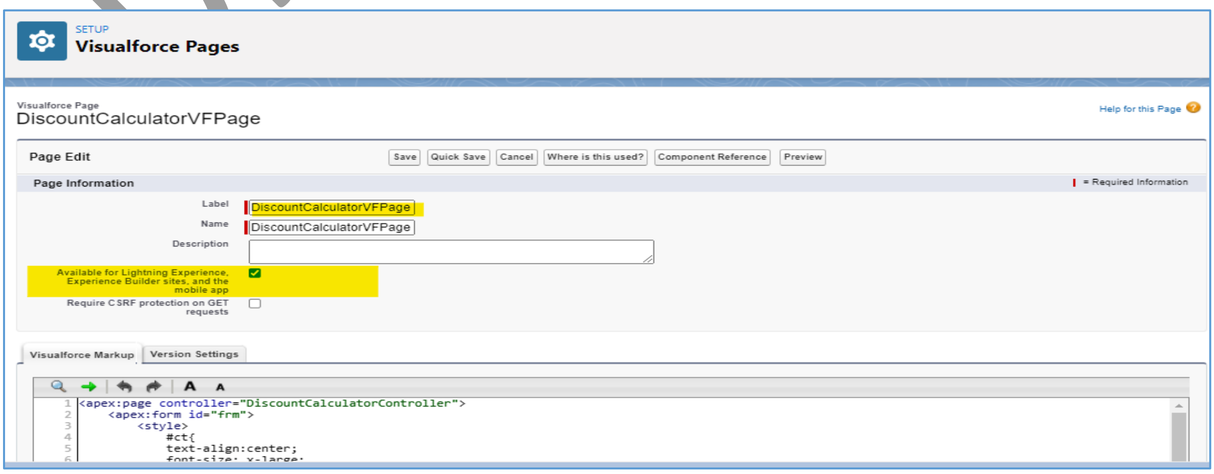


PROJECT WORK: STORY 40

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

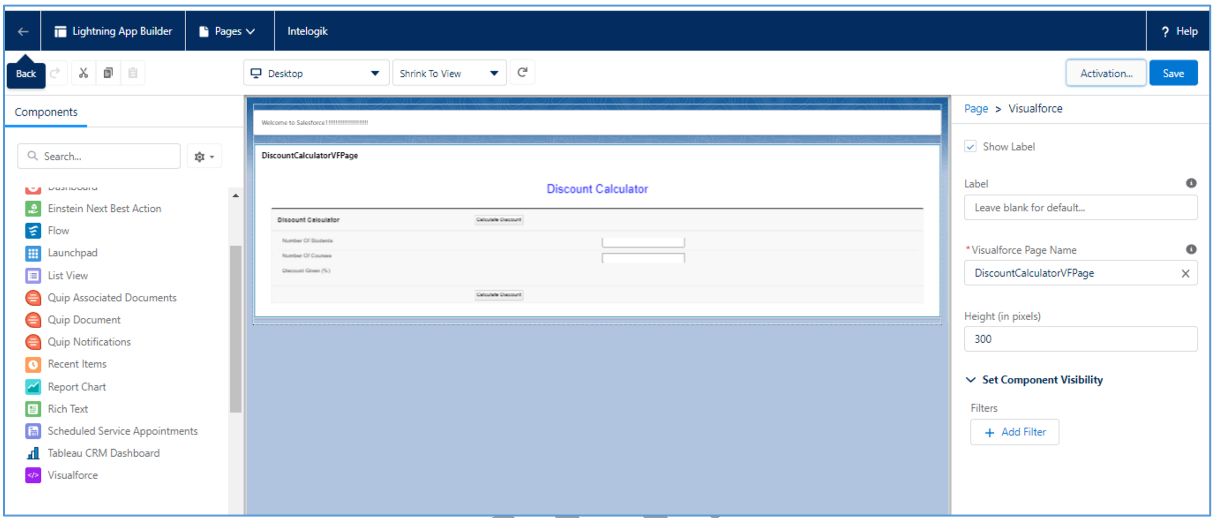
This can be achieved by creating Lightening app and using it in Salesforce1 Mobile app.

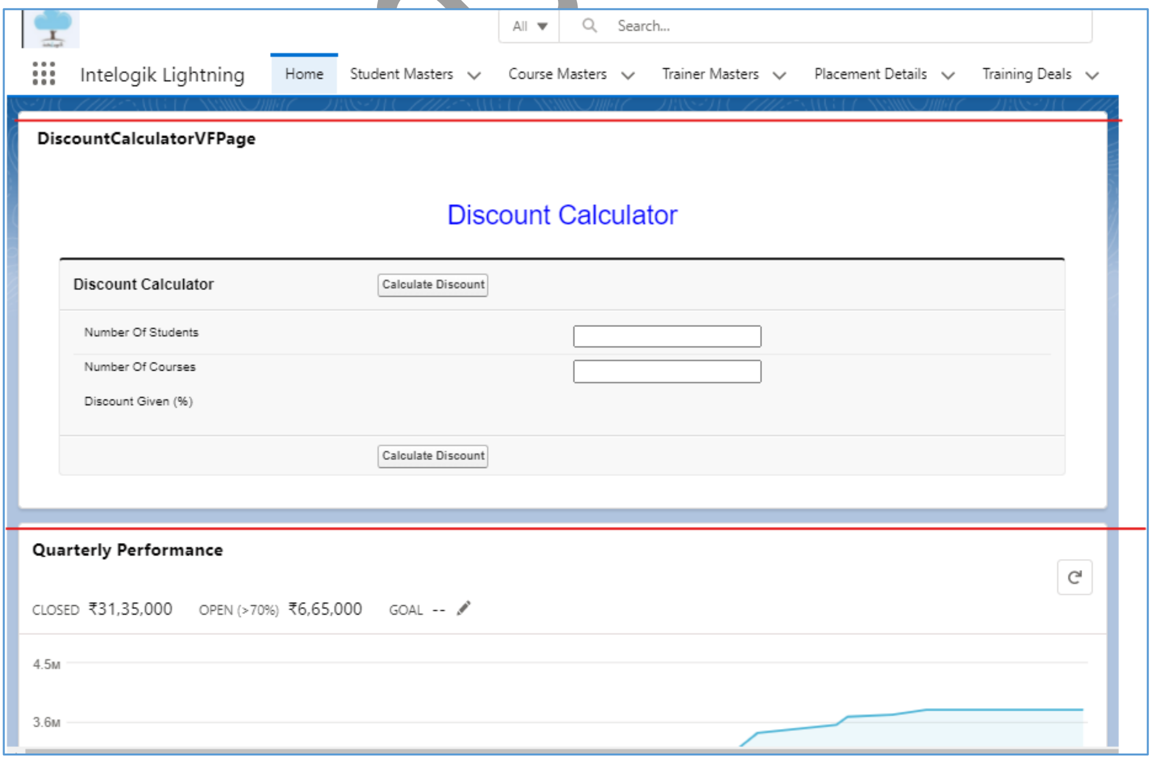
- Lightening Enabled VFPage



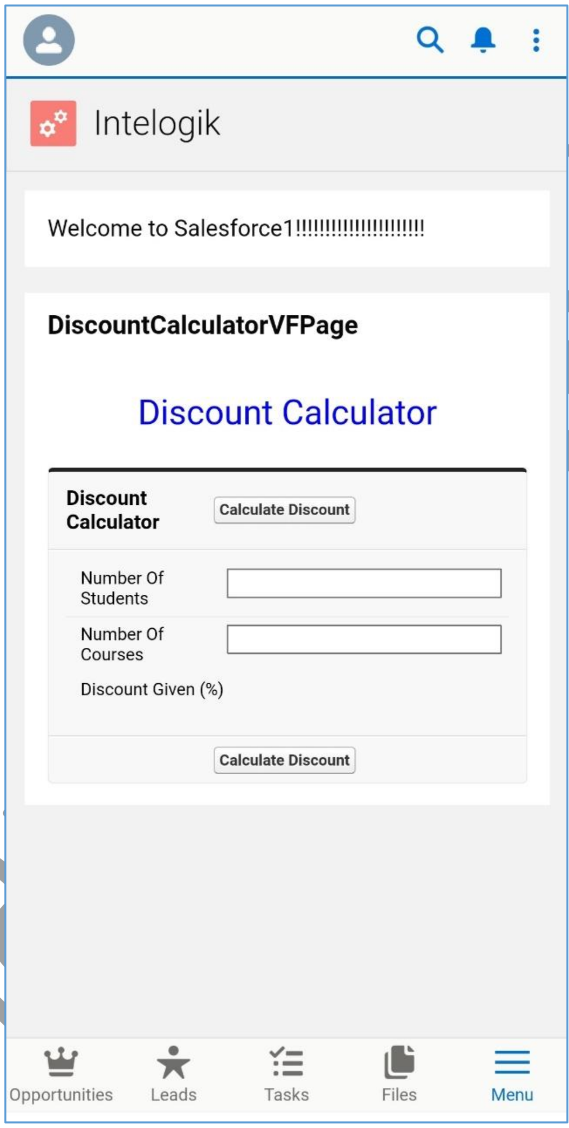
- Adding Lightening Enabled VF Page in Lightening App using Lightening App Builder

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





- Discount Calculator using Salesforce1



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

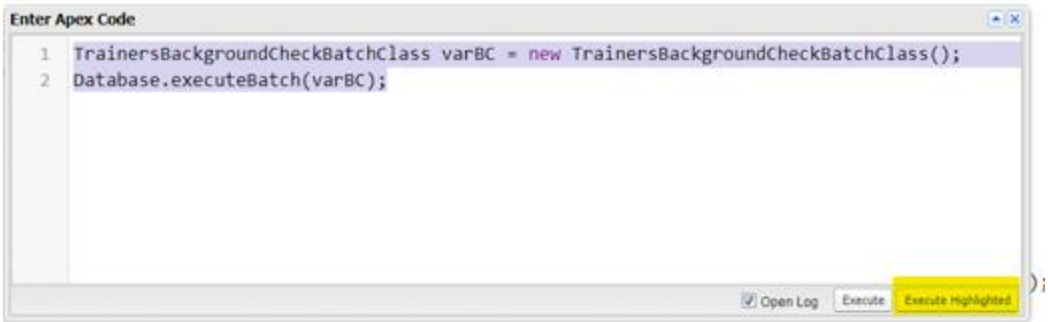
TrainersBackgroundCheckBatchClass.apxc

Code Coverage: None API Version: 52

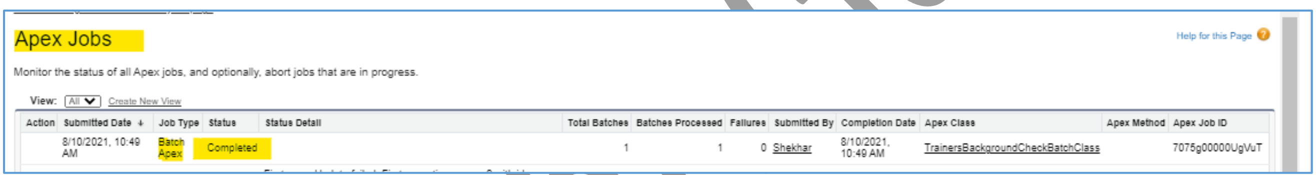
```
global class TrainersBackgroundCheckBatchClass implements Database.Batchable<sObject> {

    global Database.QueryLocator start(Database.BatchableContext BC) {
        // collect the batches of records or objects to be passed to execute

        String query = 'SELECT id, Verification_Status__c,Background_Check_Done_Yes_No__c,Linked_In_Profile__c FROM Trainer_Master__c WHERE id != null';
        return Database.getQueryLocator(query);

    }
    global void execute(Database.BatchableContext BC, List<Trainer_Master__c> scope){
        // process each batch of records
        for(Trainer_Master__c VarTM : scope){

            if(VarTM.Linked_In_Profile__c == NULL){

                VarTM.Verification_Status__c = 'Details Needed';

            }
            else{

                if(VarTM.Background_Check_Done_Yes_No__c == false){

                    VarTM.Verification_Status__c = 'Non-Verified';

                }else if(VarTM.Background_Check_Done_Yes_No__c == true){

                    VarTM.Verification_Status__c = 'Verified';
                }
            }
        }
        update scope;
    }
    global void finish(Database.BatchableContext BC){
        // execute post-processing operations
        // In this case Client wants to update fielsd of Thousands of Trainers Record
        // and  does not want to perform any operation
    }
}
```

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

- Manual Execution of Batch Class using Anonymous Window

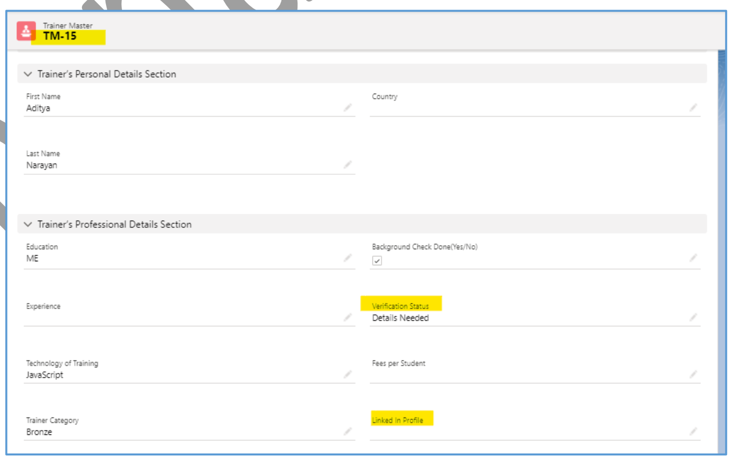


- Apex Job

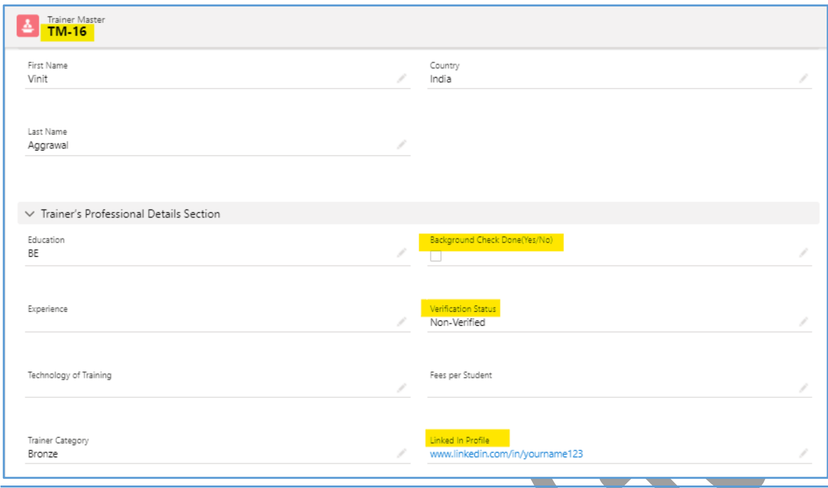


- Result after Execution of Batch Class

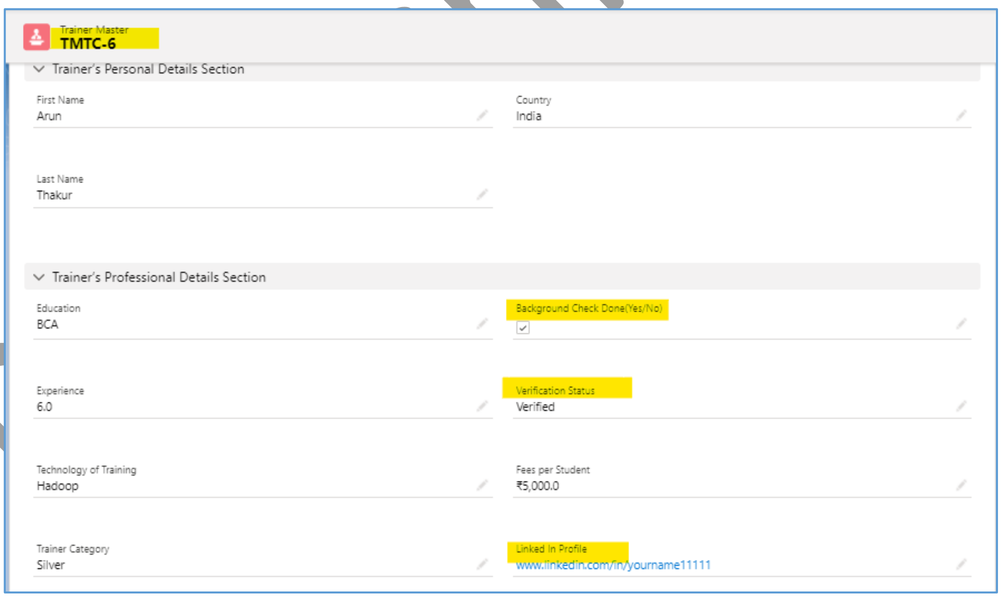
(1)When Linked In Profile is Blank then Verification Status = Details Needed.



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



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



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.

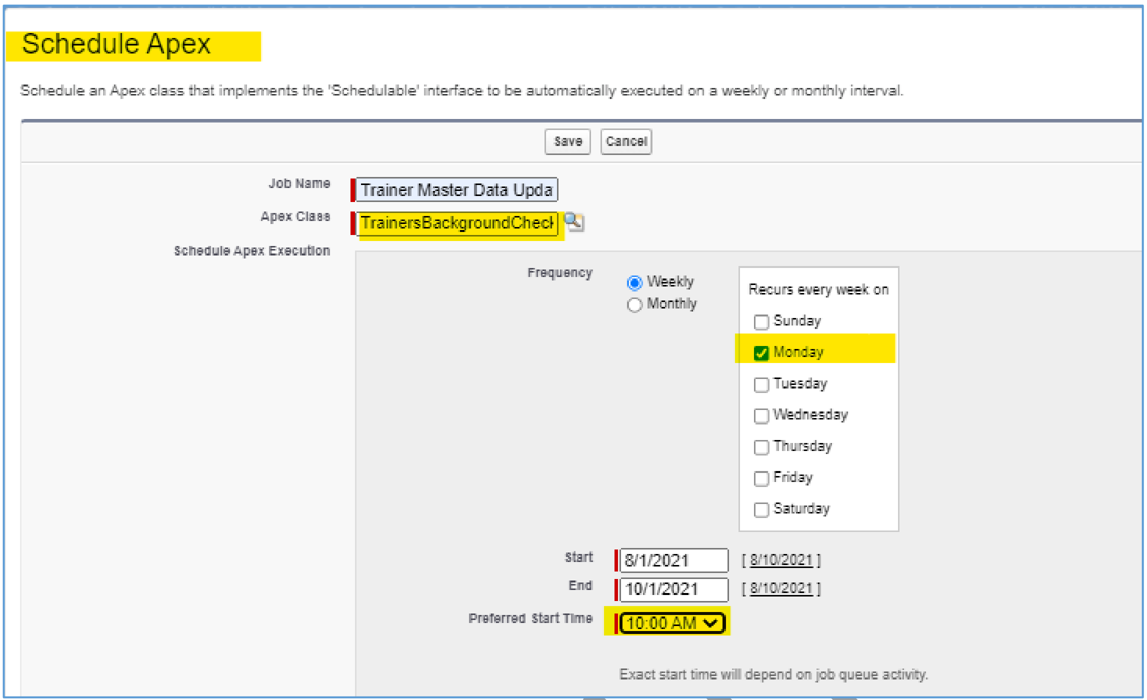
- Schedule Apex Class Name: TrainersBackgroundCheckScheduleClass

TrainersBackgroundCheckScheduleClass.apxc

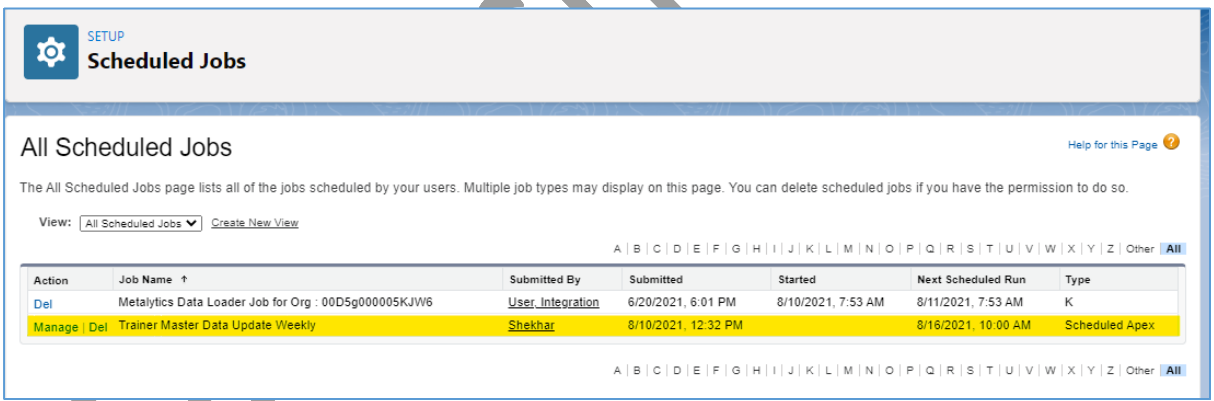
Code Coverage: None API Version: 52

```
global class TrainersBackgroundCheckScheduleClass implements Schedulable {

   global void execute(SchedulableContext sc){

       //calling Batch class in this Schedule class

       TrainersBackgroundCheckBatchClass  VarBC = new TrainersBackgroundCheckBatchClass ();
       Database.executeBatch(VarBC);
    }

}
```

- Schedule Apex



- Schedule Job



PROJECT WORK: STORY 45

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

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

Open Log | Execute | Execute Highlighted

- 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	Scedule 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

TrainersBackgroundCheckBatchClass.apxc

Code Coverage: None API Version: 52

```
global class TrainersBackgroundCheckBatchClass implements Database.Batchable<sObject>,Database.Stateful {

   global integer VarCountOfNonVerifiedTrainer =0;

   global Database.QueryLocator start(Database.BatchableContext BC) {
       // collect the batches of records or objects to be passed to execute

       String query = 'SELECT id, Verification_Status__c,Background_Check_Done_Yes_No__c,Linked_In_Profile__c FROM Trainer_Mas
       return Database.getQueryLocator(query);

   }
   global void execute(Database.BatchableContext BC, List<Trainer_Master__c> scope){
       // process each batch of records

       for(Trainer_Master__c VarTM : scope){

           if(VarTM.Linked_In_Profile__c == NULL){

               VarTM.Verification_Status__c = 'Details Needed';

           }
           else{
```

```

               if(VarTM.Background_Check_Done_Yes_No__c == false){

                   VarTM.Verification_Status__c = 'Non-Verified';

                   VarCountOfNonVerifiedTrainer = VarCountOfNonVerifiedTrainer + 1;

               }else if(VarTM.Background_Check_Done_Yes_No__c == true){

                   VarTM.Verification_Status__c = 'Verified';
               }
           }
       }
       update scope;
   }
   global void finish(Database.BatchableContext BC){
       // send Email to CEO regarding trainer's count who are 'non-verified'

       //Create a master list to hold the emails we'll send

       List<Messaging.SingleEmailMessage> mails = new List<Messaging.SingleEmailMessage> ();
```

```
        List<Profile> userBCC = [SELECT id FROM profile WHERE Name='System Administrator'];

        for(User sysAdminUser :[Select id,Email,LastName from user where ProfileID IN:userBCC]) {
            String subject = 'Count of Non-Verified Trainers record Information.';
            String body = 'Mr Shekar \n\n'+
                'Hope you are doing Good!!!!!!!!!!!!!!!.\n\n'+
                'Please have a look at the Count of Non-Verified Trainers record Information..\n\n'+
                'Number of UnVerified Trainers :' + VarCountOfNonVerifiedTrainer + '\n'+
                'Thank You!!!!!!!!!!!!!!!!';

            // Create a new Email

            Messaging.SingleEmailMessage mail = new Messaging.SingleEmailMessage();

            // Now sets the below paramaters of the email object
            mail.setSubject( subject );
            mail.setPlainTextBody( body );

            // Set list of people who should be BCC'ed
            List<String> Toaddr = new List<String>();
            Toaddr.add(sysAdminUser.Email);
            mail.setBccAddresses(Toaddr);

            // assign user
            mail.setTargetObjectId(sysAdminUser.Id);
            mail.setSaveAsActivity(false);

            // Add your email to the master list
            mails.add(mail);
        }

        // Send all emails in the master list

        Messaging.sendEmail(mails);

    }
}
```

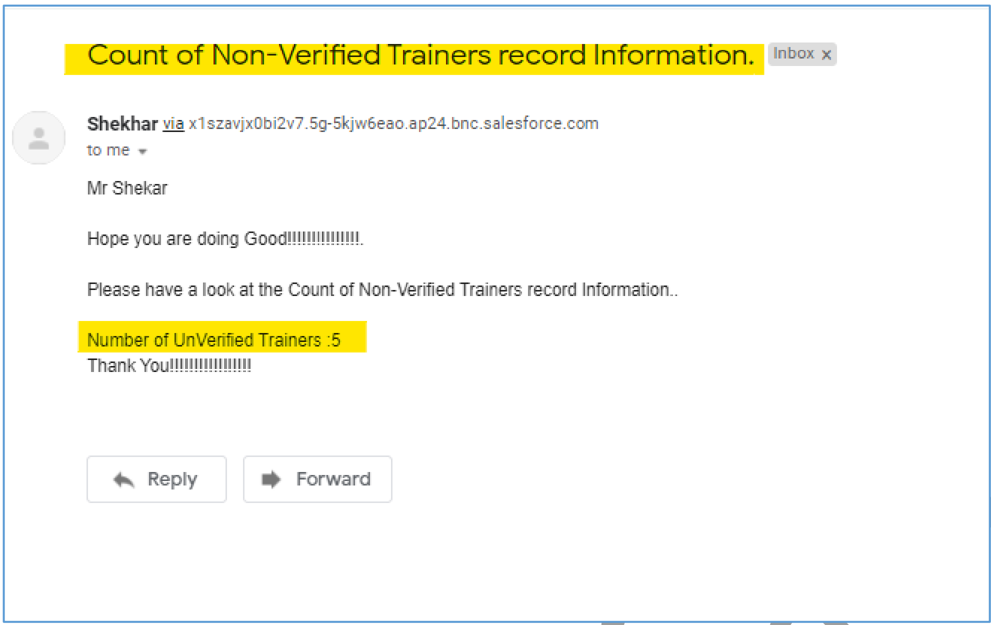
- Manual Execution of Batch Class using Anonymous Window

Enter Apex Code

```
TrainersBackgroundCheckBatchClass varBC = new TrainersBackgroundCheckBatchClass();
Database.executeBatch(varBC);
```

Open Log   Execute   Execute Highlighted

- 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

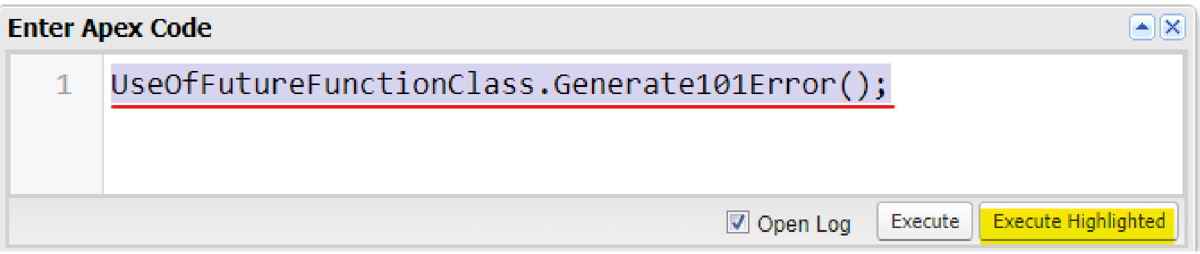
Project Trouble shooting Scenario. There are few queries inside FOR loop and when code is executing it is hitting Governer limit and generating 101 error.

This problem can be overcome by using Future Method.

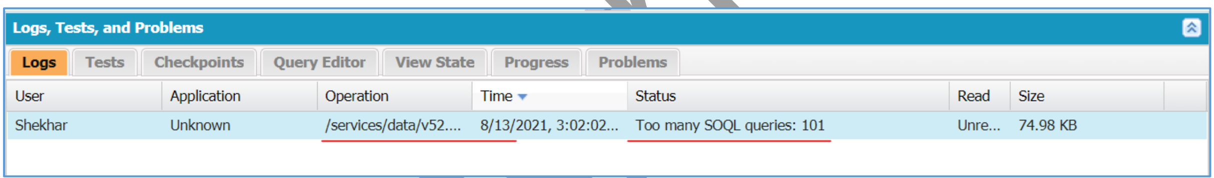
- Apex Class Name: UseOfFutureFunctionClass

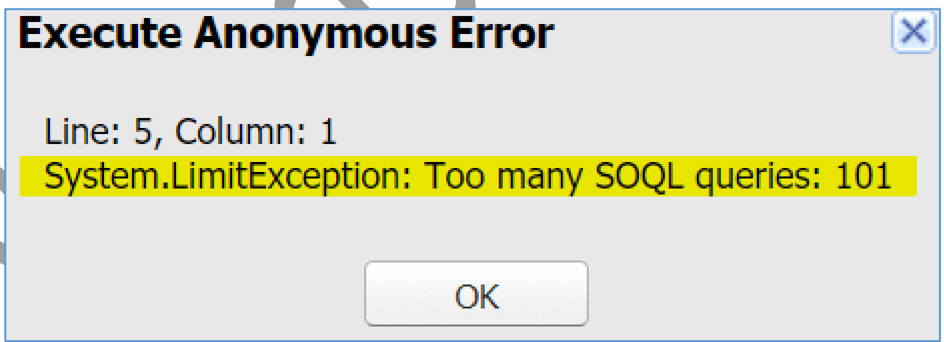
```
public class UseOfFutureFunctionClass {

    public static void Generate101Error(){
        for(Integer i=0;i<=100;i++){
            Account a = [SELECT Id FROM account LIMIT 1];
        }
    }
}
```

- Manual Execution of Batch Class using Anonymous Window



- 101 Error after Execution of Class





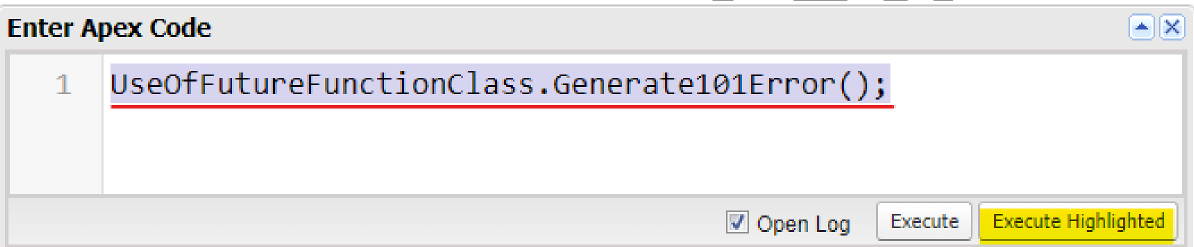
- Use of "Future Method" to by pass 101 Error

```
public class UseOfFutureFunctionClass {

    @future
    public static void Generate101Error(){
        for(Integer i=0;i<=150;i++){
            Account a = [SELECT Id FROM account LIMIT 1];
        }
    }
}
```

- Manual Execution of Batch Class using Anonymous Window

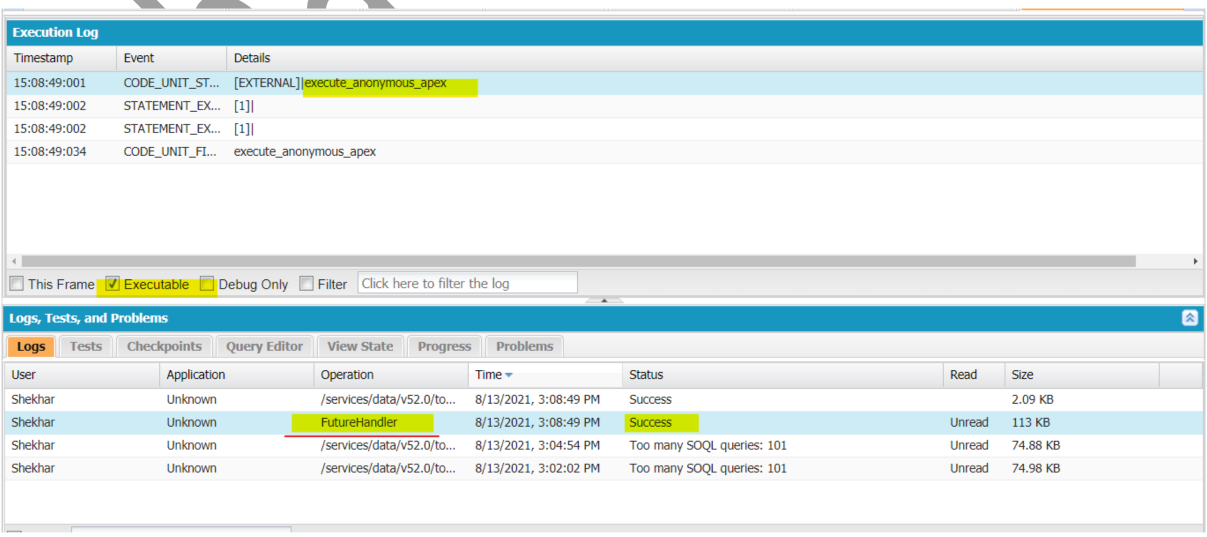
Enter Apex Code

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



- Result after Execution of Future Method

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



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

```
public with sharing class VendorInformationController {

    //Declaration of Variables
    Public String VendorCompanyName{set;get;}
    Public String VendorContactPerson{set;get;}
    Public String AmountPerEvent{set;get;}
    Public String City{set;get;}
    Public String Country{set;get;}


    //Declaration of Send Email method
    Public void SendEmail(){
    }

    //Declaration of generate PDF method
    Public void GeneratePDF(){
    }

    //Declaration of Reset method
    Public void Reset(){
    }
}
```

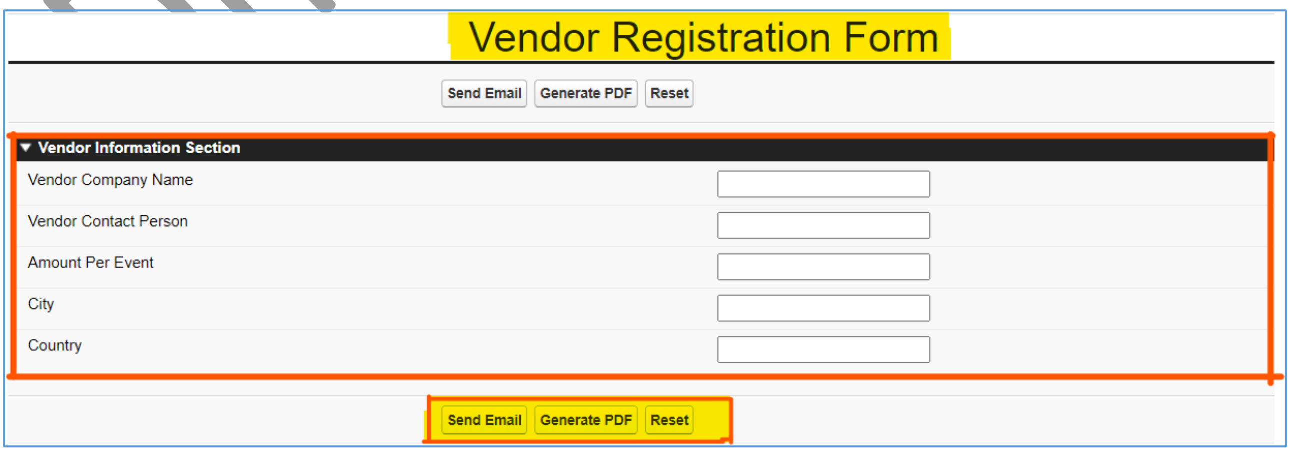
- Visualforce Page Name: VendorInformationVFPage

VendorInformationController.apxc | VendorInformationVFPage.vfp

Preview | API Version: 52

```
<apex:page controller="VendorInformationController">
    <apex:form>
      <style>
          #ct{
          text-align:center;
          font-size: xx-large;
          }
       </style>
       <div id="ct">
         <h>Vendor Registration Form</h>

       </div>

           <apex:pageBlock >

               <apex:pageBlockSection title="Vendor Information Section" columns="2" >

                   <apex:outputLabel>Vendor Company Name</apex:outputLabel>
                   <apex:inputText value="{!VendorCompanyName}"/>

                   <apex:outputLabel>Vendor Contact Person</apex:outputLabel>
                   <apex:inputText value="{!VendorContactPerson}"/>

                   <apex:outputLabel>Amount Per Event</apex:outputLabel>
                   <apex:inputText value="{!AmountPerEvent}"/>

                   <apex:outputLabel>City</apex:outputLabel>
                   <apex:inputText value="{!City}"/>

                   <apex:outputLabel>Country</apex:outputLabel>
                   <apex:inputText value="{!Country}"/>

               </apex:pageBlockSection>

               <apex:pageBlockButtons >
                   <apex:commandButton value="Send Email" action="{!SendEmail}" />
                   <apex:commandButton value="Generate PDF" action="{!GeneratePDF}" />
                   <apex:commandButton value="Reset" action="{!Reset}" />
               </apex:pageBlockButtons>

           </apex:pageBlock>
       </apex:form>
</apex:page>
```

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



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.

- 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

```
public with sharing class VendorInformationController {

    //Declaration of Variables
    Public String VendorCompanyName{set;get;}
    Public String VendorContactPerson{set;get;}
    Public String AmountPerEvent{set;get;}
    Public String City{set;get;}
    Public String Country{set;get;}


    //Declaration of Send Email method
    Public void SendEmail(){
    }

    //Declaration of generate PDF method
    Public void GeneratePDF(){
    }

    //Declaration of Reset method
    Public void Reset(){
    }
}
```

- Visualforce Page Name: VendorInformationVFPage

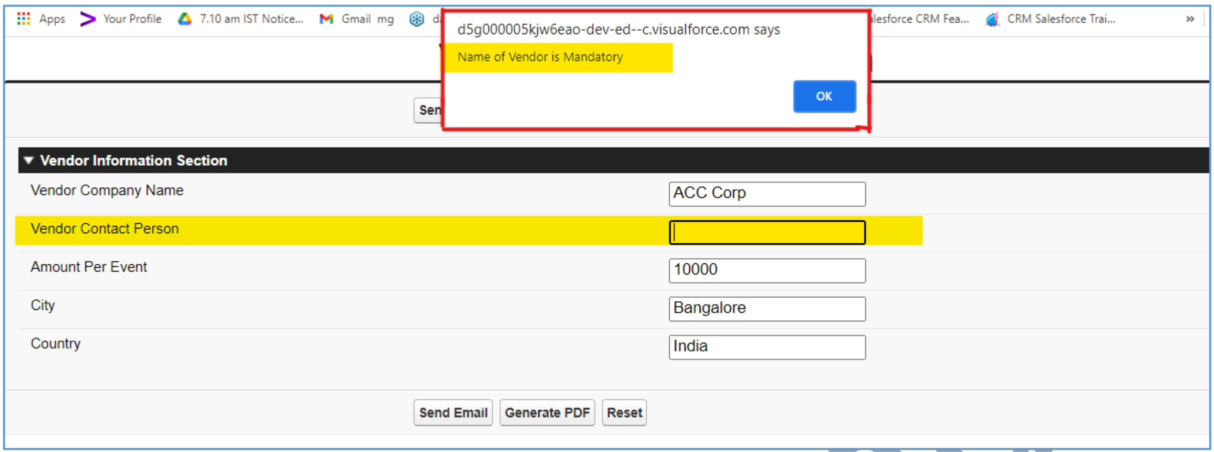
VendorInformationController.apxc | VendorInformationVFPage.vfp

Preview | API Version: 52

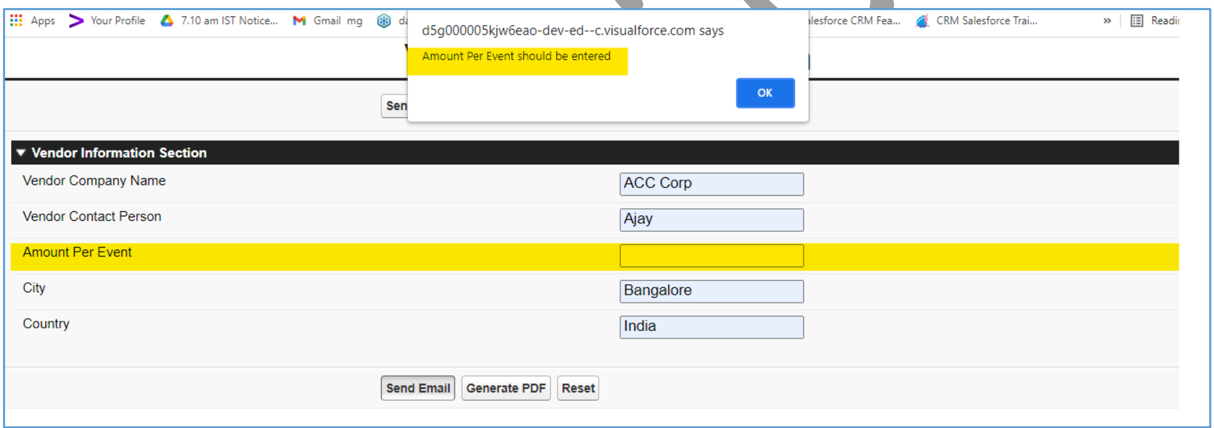
```
<apex:page controller="VendorInformationController" >

    <script type="text/javascript">

        //Validation to make Vendor Person's Name Mandatory

        function validateName(){

            if(document.getElementById('{!$Component.frm.pb.pbs.id2}').value==''){
                alert("Name of Vendor is Mandatory");
            }
        }
        //validation for Send Email button depending on  Amount Per Event field

        function validateAmount(){

            if(document.getElementById('{!$Component.frm.pb.pbs.id3}').value==''){
                alert("Amount Per Event should be entered");
            }
            else{
                SendEmail();
            }
        }

        //validation for 'Generate PDF' button depending on Country and City

        function validateCityAndCountry(){

            if(document.getElementById('{!$Component.frm.pb.pbs.id4}').value=='' && document.getElementById('{!$Component.frm.pb.pbs.id5}').value==''){
                alert("Please enter City and Country");
            }
            else{
                GeneratePDF();
            }

        }

    </script>

    <apex:form id="frm">
        <style>
            #ct{
            text-align:center;
            font-size: xx-large;
            }
        </style>
        <div id="ct">
            <h>Vendor Registration Form</h>

        </div>

        <apex:actionFunction action="{!SendEmail}"  name="SendEmail" reRender="af1" />
        <apex:actionFunction action="{!GeneratePDF}"  name="GeneratePDF" reRender="af2" />
        <apex:actionFunction action="{!Reset}"  name="Reset" reRender="af3" />

            <apex:pageBlock  id="pb">

                <apex:pageBlockSection title="Vendor Information Section" columns="2" id="pbs">

                    <apex:outputLabel>Vendor Company Name</apex:outputLabel>
                    <apex:inputText value="{!VendorCompanyName}" id="id1"/>

                    <apex:outputLabel>Vendor Contact Person</apex:outputLabel>
                    <apex:inputText value="{!VendorContactPerson}" required="true" id="id2"  onclick="validateName();"/>

                    <apex:outputLabel>Amount Per Event</apex:outputLabel>
                    <apex:inputText value="{!AmountPerEvent}" id="id3" />

                    <apex:outputLabel>City</apex:outputLabel>
                    <apex:inputText value="{!City}" id="id4"/>

                    <apex:outputLabel>Country</apex:outputLabel>
                    <apex:inputText value="{!Country}" id="id5"/>

                </apex:pageBlockSection>

                <apex:pageBlockButtons >
                    <apex:commandButton value="Send Email"  onclick="validateAmount();" />
                    <apex:commandButton value="Generate PDF" onclick="validateCityAndCountry();" />
                    <apex:commandButton value="Reset" />
                </apex:pageBlockButtons>

            </apex:pageBlock>
        </apex:form>

</apex:page>
```

- Clicking on Preview on Visualforce page;

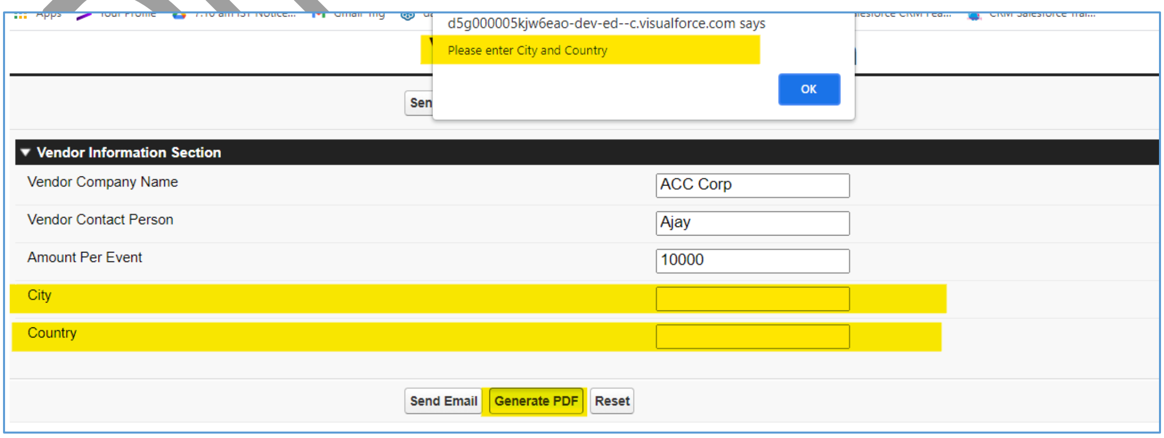
- Vendor's Name is Mandatory alert is shown on clicking in input field for 'Vendor Person's Name'.



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



- City and Country is blank then User cannot click on 'Generate PDF' 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 | VendorInformationVFPage.vfp

Code Coverage: None | API Version: 52

```
public with sharing class VendorInformationController {

    //Declaration of Variables
    Public String VendorCompanyName{set;get;}
    Public String VendorContactPerson{set;get;}
    Public String AmountPerEvent{set;get;}
    Public String City{set;get;}
    Public String Country{set;get;}


    //Declaration of Send Email method
    Public void SendEmail(){
    }

    //Declaration of generate PDF method
    Public void GeneratePDF(){
    }

    //Declaration of Reset method
    Public void Reset(){
    }
}
```

- Visualforce Page Name: VendorInformationInPDF

VendorInformationController.apxc | VendorInformationVFPage.vfp | VendorInformationInPDF.vfp

Preview API Version: 52

```
<apex:page  controller="VendorInformationController" renderAs="PDF">
<apex:form>

            <apex:pageBlock id="pb">

                <apex:pageBlockSection title="Vendor Information Section" columns="2" id="pbs">

                    <apex:outputLabel >Vendor Company Name :  </apex:outputLabel>
                    <apex:outputText>   {!VendorCompanyName}</apex:outputText>

                    <apex:outputLabel >Vendor Contact Person : </apex:outputLabel>
                    <apex:outputText>   {!VendorContactPerson}</apex:outputText>

                    <apex:outputLabel >Amount Per Event : </apex:outputLabel>
                    <apex:outputText>   {!AmountPerEvent}</apex:outputText>

                    <apex:outputLabel >City  : </apex:outputLabel>
                    <apex:outputText>  {!City}</apex:outputText>

                    <apex:outputLabel >Country : </apex:outputLabel>
                    <apex:outputText>  {!Country}</apex:outputText>


                </apex:pageBlockSection>

            </apex:pageBlock>
        </apex:form>
</apex:page>
```

- Visualforce Page Name: VendorInformationVFPage

VendorInformationController.apxc | VendorInformationVFPage.vfp | VendorInformationInPDF.vfp

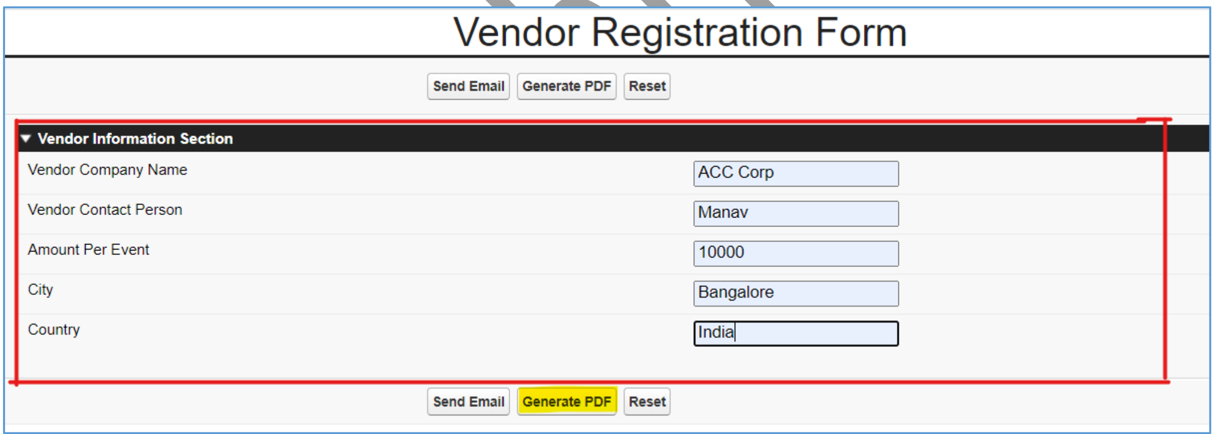
Preview API Version: 52

```
<apex:page controller="VendorInformationController" >

        <script type="text/javascript">

        //Validation to make Vendor Person's Name Mandatory

        function validateName(){

            if(document.getElementById('{!$Component.frm.pb.pbs.id2}').value==''){
                alert("Name of Vendor is Mandatory");
            }
        }
        </script>

        <script type="text/javascript">

        //validation for Send Email button depending on  Amount Per Event field

        function validateAmount(){

            if(document.getElementById('{!$Component.frm.pb.pbs.id3}').value== '') {
                alert("Amount Per Event should be entered");

            }
            else {
                SendEmail();
            }
        }

        </script>

        <script type="text/javascript">

        //validation for 'Generate PDF' button depending on Country and City

        function validateCityAndCountry(){

            if(document.getElementById('{!$Component.frm.pb.pbs.id4}').value=='' && document.getElementById('{!$Component.frm.pb.pbs.id5}').value==''){
                alert("Please enter City and Country");
            }
            else{
                GeneratePDF();
            }

        }

        </script>

    <apex:form id="frm">
       <style>
            #ct{
            text-align:center;
            font-size: xx-large;
            }
        </style>
        <div id="ct">
            <h>Vendor Registration Form</h>

        </div>
```

```
        <apex:actionFunction action="{!SendEmail}"   name="SendEmail" reRender="af1" />
        <apex:actionFunction action="{!GeneratePDF}"  name="GeneratePDF" reRender="af2"  />
        <apex:actionFunction action="{!Reset}"  name="Reset" reRender="af3" />

            <apex:pageBlock id="pb">

                <apex:pageBlockSection title="Vendor Information Section" columns="2" id="pbs">

                    <apex:outputLabel >Vendor Company Name</apex:outputLabel>
                    <apex:inputText value="{!VendorCompanyName}" id="id1"/>

                    <apex:outputLabel >Vendor Contact Person</apex:outputLabel>
                    <apex:inputText value="{!VendorContactPerson}" required="true" id="id2"  onclick="validateName();"/>

                    <apex:outputLabel >Amount Per Event</apex:outputLabel>
                    <apex:inputText value="{!AmountPerEvent}" id="id3"/>

                    <apex:outputLabel >City</apex:outputLabel>
                    <apex:inputText value="{!City}" id="id4"/>

                    <apex:outputLabel >Country</apex:outputLabel>
                    <apex:inputText value="{!Country}" id="id5"/>

                </apex:pageBlockSection>

                <apex:pageBlockButtons id="pbb" >
                    <apex:commandButton value="Send Email"  onclick="validateAmount();" id="pbb1" />
                    <apex:commandButton value="Generate PDF" onclick="validateCityAndCountry();" id="pbb2" action="/apex/VendorInformationInPDF"  />
                    <apex:commandButton value="Reset" />
```

```
                </apex:pageBlockButtons>

            </apex:pageBlock>
        </apex:form>

</apex:page>
```

- Clicking on Preview on Visualforce page;



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