Eva Lucero Pérez Salcedo
Evalps24@gmail.com
Eng. Computational Technologies
Salesforce – Liderly Developer Course

Feedback and Personal Reflection

At first, I struggled to make the correct architecture within the Standard Objects and Custom, there were a lot of Objects I wanted to make from 0 without realizing that most of them where already included between Contact, Opportunity and Quote.

I had to understand correctly the difference between Account and Contact, Lookup Relationships and Junctions, Quotes and Quote Line Items. And always use low code if possible.

I made four different Trailhead Playgrounds in my process to finally understand the correct approach, it was a hard way for me to learn but in the end it all came as a success (that's what I think from my project).

1. First Playground, created custom fields with formulas all over Opportunity, Contact and Quote, without a correct structure. I didn't know how to make a lookup relationship to connect them as I wanted to. It was on the right track now that I look for it, but lacked understanding of the standard connection between them.
2. Second Playground, I thought I had it in less than a day, I added all custom fields necessary to Contact Object and make a Quote from them, PDF Quote didn't work so I created a Visualforce PDF to send by a Record Triggered Flow. I had issues with the Trigger, Apex Class and couldn't do an Approval Process without the Opportunity Layout. Contact had all formulas, and it was kind of confusing to follow.
3. Third Playground, it was after my meeting with an assessor that I got a hint of how I could do it the most optimal way, I remember that I asked him "If I almost have all the project done but I know it is not how it's meant to be, should I change it again from 0 or should I submit what I already have?" and he said "It's only up to how you feel about it and your capability, it's no right answer, if you feel you can do it, go for it". So, I created a third one for Trailhead badges to learn more about how to implement Price books, Opportunities, Approval Processes, Discounts and Quotes.
4. Fourth Playground, here is where everything altogether finally made sense, it has room for improvement but is the correct way to make an Administrative Process for a School between Contacts, Products, Prices, Discounts and Quotes.

Future improvements:

- I learned a lot about CPQ methods, Configure Price Quote, unfortunately I couldn't apply any of my knowledge as it was a more basic way to approach this project. In a more robust implementation for a school system this would be optimal.
- I found way easier to make Flows for the automations I needed, as they were simpler than the Visualforce Page, I didn't feel the need to use Triggers or more classes than needed.
- Salesforce had everything I needed, I just lacked research and understanding to approach the project correctly.

Conclusion:

I did struggle a lot, but at the end I felt the joy of succeeding with every requirement asked. Next time I will know how to do it more efficiently as every Trailhead Playground I created took me less time than the previous one, each one making me love-hate the platform even more. But surely for me it was fun in the end. I felt I could do anything; it's just taking the actual time to learn it and research in Salesforce documentation.