
Salesforce Project

Consultant Journey

Technologies and experience gained over this program

Presentation

Reflection and Retrospection



Journey as a
consultant



Technologies

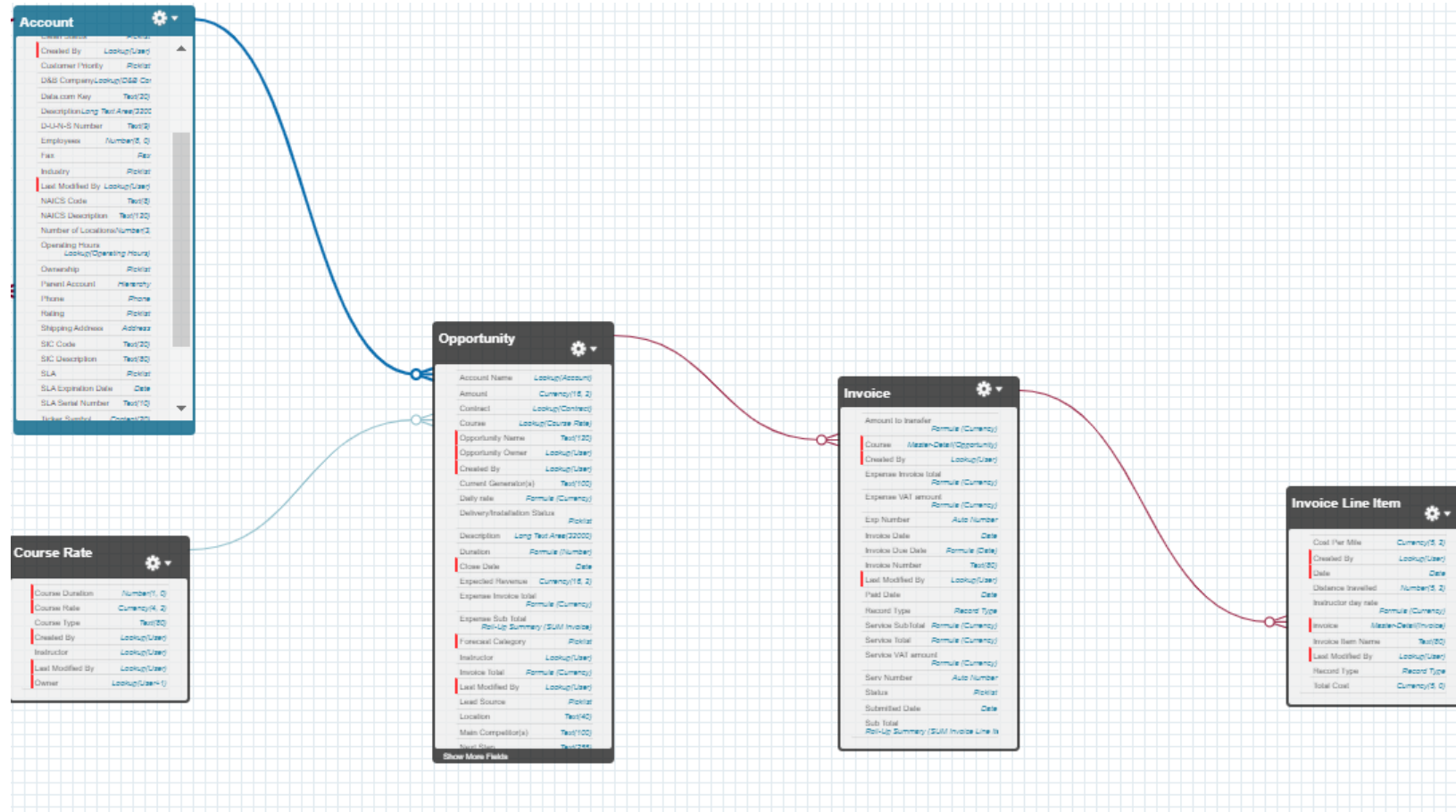
Apex

Declarative features
visual force


Phase 1 - Declarative

- Process builder
- Validation rules
- Record types
- Roll up summaries and formula fields


Custom objects – Schema Overview



Custom SOjbject - Course Rates





 Course Rate

DEX450 Programmatic Development with Apex & VisualForce - Mary


[New Contact](#) [Edit](#) [New Course](#) 

Related

Details

Course Type	DEX450 Programmatic Development with Apex & VisualForce - Mary	Owner	 Muddasir Ahmad
Course Duration	5		
Instructor	 Mary Stevens		
Course Rate	£15.00		
Created By	 Muddasir Ahmad , 26/02/2021, 17:46	Last Modified By	 Muddasir Ahmad , 11/03/2021, 11:24

Custom SObject – Courses (opportunities)

 Course

DEX450 Programmatic Development with Apex & VisualForce - Mary

Stage

Scheduled

Total Course Cost

£90.00


Expense Invoice total

£0.00

Scheduled

Closed

Details

Course Name	DEX450	Start Date	08/04/2021
Account Name	ForceTraining Ltd	End Date	12/04/2021
Stage	Scheduled	Duration	5
Location	Milton Keynes	VAT Rate	20.00%
Course	DEX450 Programmatic Development with Apex & VisualForce - Mary	Service Tax Rate	30%
Instructor	 Mary Stevens	Total Course Cost	£90.00
Daily rate	£15.00	Expense Sub Total	£0
Invoice Total	£90.00	Expense Invoice total	£0.00

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

▼ [Hide Filter Settings](#)

Filter Criteria

Insert Suggested Criteria

[Clear Filter Criteria](#)

Field	Operator	Value / Field
Course: Instructor	equals	Field Opportunity: Instructor
AND Begin typing to search for a field...	--None--	Value

[Add Filter Logic...](#)

Filter Type

- ☒ **Required.** The user-entered value must match filter criteria.
- If it doesn't, display this error message on save:
- Value does not exist or does not match filter criteria.
- [Reset to default message](#)
- ☐ **Optional.** The user can remove the filter or enter values that don't match criteria.

Lookup Window Text

Add this informational message to the lookup window.

Active

☒ Enable this filter.

Change Field Type

Save

Cancel

Custom S Object – Invoice

Invoice

Serv-0144

Invoice Date	Status	Service SubTotal	Service Total
31/03/2021		£50.00	£60.00

Draft

Submitted

Related List Quick Links 1

3

[Invoice Line Items \(5\)](#)

Details

Invoice Date

31/03/2021

Serv Number

Serv-0144

Course

[ADX211](#)

Status

Amount to transfer

£42.00

Submitted Date

Paid Date

Invoice Due Date

Service SubTotal

£50.00

Service Total

£60.00

Invoice Number

INV-(0015)

Custom S Object – Invoice Line item

PAGE LAYOUT NAME



CREATED BY

Invoice Line Item Layout

Muddasir Ahmad, 24/02/2021, 13:01

MileageFields

Muddasir Ahmad, 25/02/2021, 09:12

Profiles	Mileage	Parking	Phone	Services
Analytics Cloud Integration User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Analytics Cloud Security User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Billing Administrator	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Chatter External User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Chatter Free User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Chatter Moderator User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Contract Manager	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Cross Org Data Proxy User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Custom: Marketing Profile	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Custom: Sales Profile	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Custom: Support Profile	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Force.com - App Subscription User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Force.com - Free User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Gold Partner User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Identity User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Instructor	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Marketing User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Minimum Access - Salesforce	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Partner App Subscription User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Partner Community Login User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Partner Community User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Silver Partner User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Solution Manager	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Standard Platform User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Standard User	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
System Administrator	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout
Training Coordinator	MileageFields	Invoice Line Item Layout	Invoice Line Item Layout	Invoice Line Item Layout

Validation rules

Validation Rules

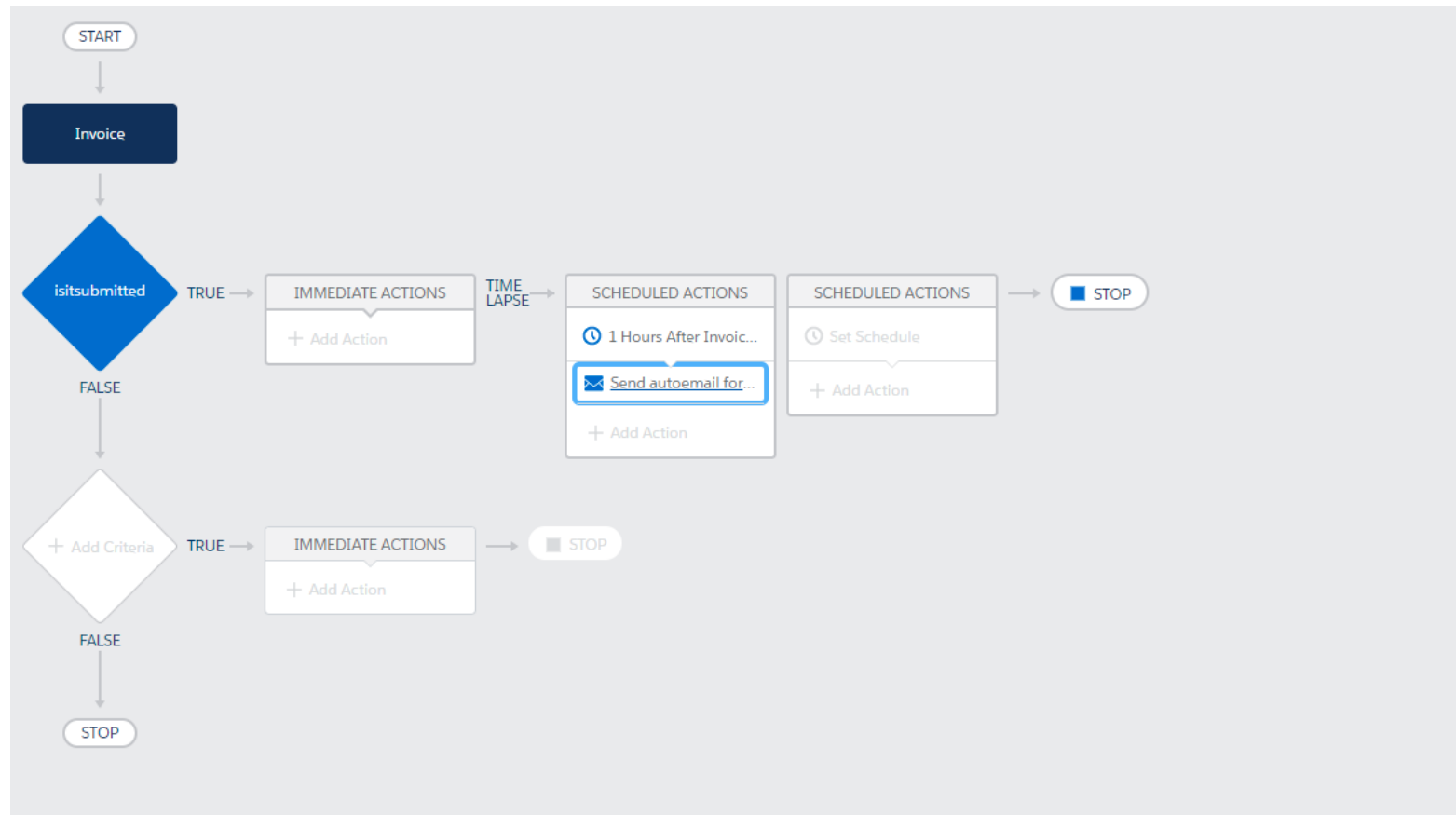
3 Items, Sorted by Rule Name

[New](#)

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
not_a_future_date	Top of Page	You cant enter a date in the future!	✓	Muddasir Ahmad , 26/02/2021, 13:47	▼
provide_date_for_paid_rule	Top of Page	Please provide a paid date if you wish to change the status to paid	✓	Muddasir Ahmad , 26/02/2021, 13:03	▼
provide_date_for_submit_rule	Top of Page	Provide a submitted date if you want to change the status to 'submitted'	✓	Muddasir Ahmad , 26/02/2021, 11:24	▼

```
AND( ISPICKVAL( Status__c , "Paid" ), ISBLANK( Paid_Date__c ) )
```

Process Builder



Email Alerts

Action Name * ⓘ

Send autoemail for overdue payme

Email Alert *

Overdue_payment_email_alert

Security and profiles

<div><div>New User</div><div>Reset Password(s)</div><div>Add Multiple Users</div></div>									
<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager	
<input type="checkbox"/> Edit	Ahmad Muddasir	MAhmad	muddasir.ahmed@hotmail.com	31/03/2021, 09:30		<input checked="" type="checkbox"/>	System Administrator		
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d4i000000du8huac.evnkc2t9zo7w@chatter.salesforce.com			<input checked="" type="checkbox"/>	Chatter Free User		
<input type="checkbox"/> Edit	Cooper David	dcoop	dc@mabluesefir.com		Instructor	<input type="checkbox"/>	Instructor		
<input type="checkbox"/> Edit	Lewis Mandie	mlewi	ml@mabluesefir.com		CEO	<input type="checkbox"/>	Standard Platform User		
<input type="checkbox"/> Edit	Lincoln Susan	slinc	sl@mabluesefir.com		Training Coordinator	<input type="checkbox"/>	Training Co-ordinator		
<input type="checkbox"/> Edit	Peters Jason	jpete	jp@mabluesefir.com		Billing Administrator	<input type="checkbox"/>	Billing Administrator		
<input type="checkbox"/> Edit	Smith Peter	psmit	ps@mabluesefir.com		Instructor	<input type="checkbox"/>	Instructor		
<input type="checkbox"/> Edit Login	Stevens Mary	mstev	ms@mabluesefir.com	26/02/2021, 15:14	Instructor	<input checked="" type="checkbox"/>	Instructor		
<input type="checkbox"/> Edit	User Integration	integ	integration@00d4i000000du8huac.com			<input checked="" type="checkbox"/>	Analytics Cloud Integration User		
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d4i000000du8huac.com			<input checked="" type="checkbox"/>	Analytics Cloud Security User		
<div><div>New User</div><div>Reset Password(s)</div><div>Add Multiple Users</div></div>									

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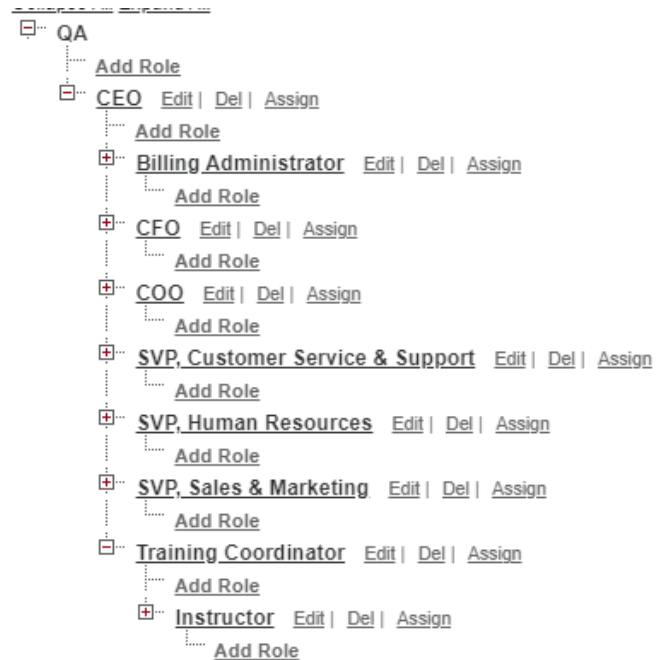
X


Y

Z

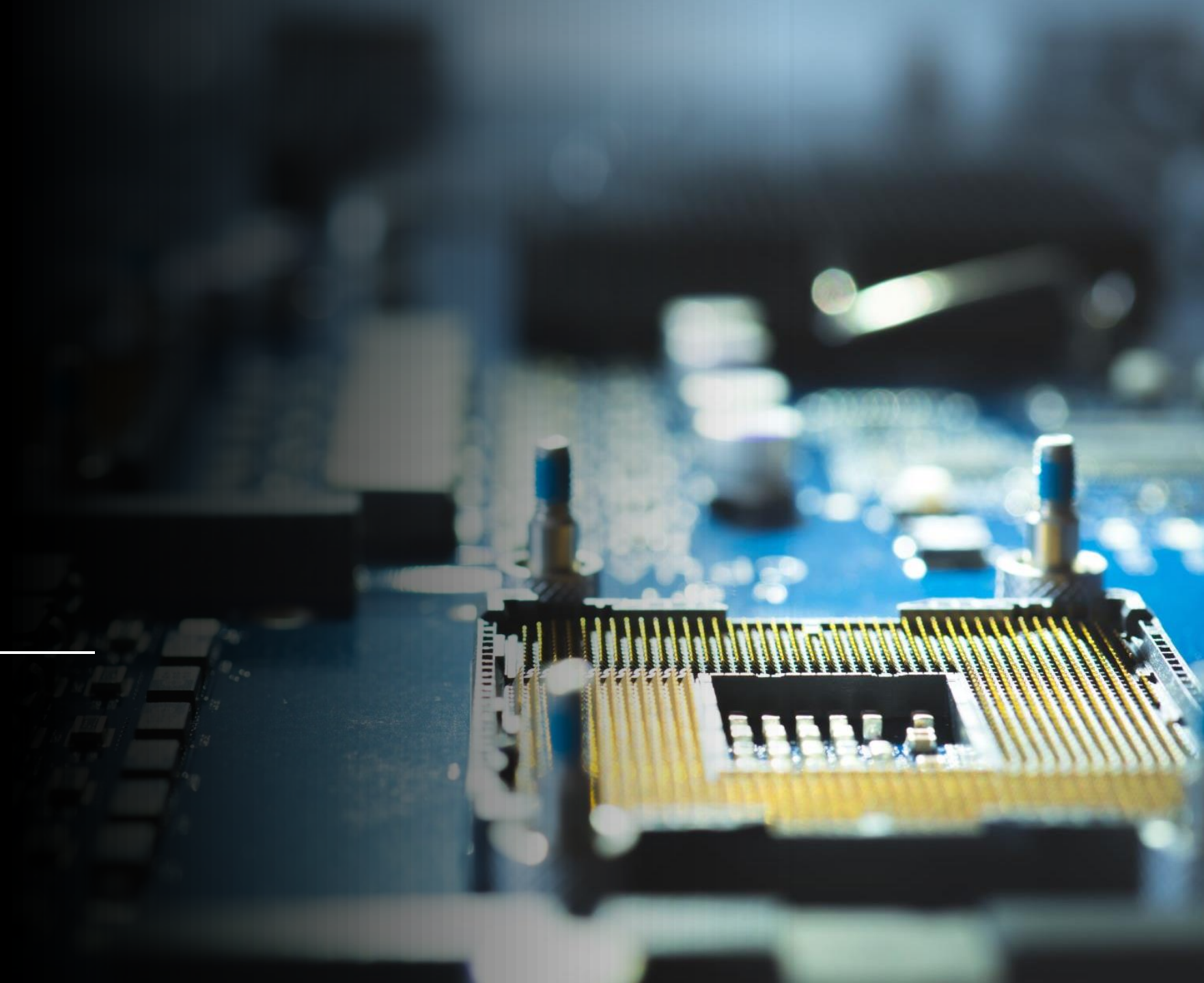
Other

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](#)



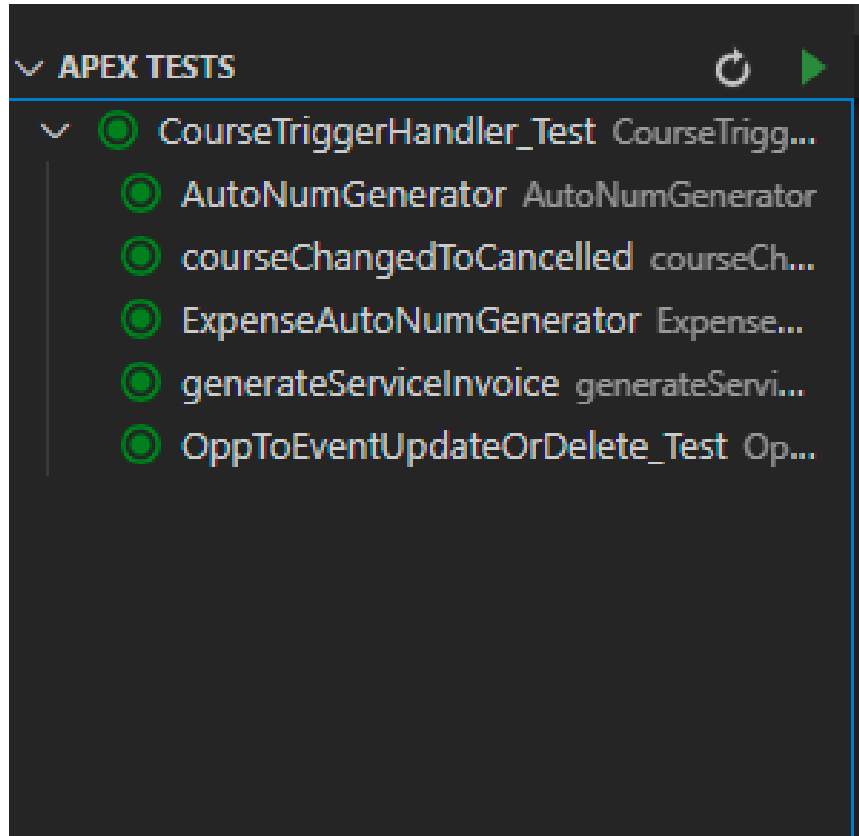


Phase 2 – Automation using Apex Triggers



```
public static void ShareCourse(List<Opportunity> coursesToShare){  
    // create list of opportunity share records for later insertion  
    List<OpportunityShare> opportunitiesToShare = new List<OpportunityShare>();  
  
    // for each opportunity in trigger.new  
    for( Opportunity opportunity : coursesToShare) {  
        // create opportunity share object  
        OpportunityShare shareRule = new OpportunityShare();  
        // set field values on share object  
        shareRule.OpportunityID = opportunity.Id;  
        shareRule.OpportunityAccessLevel = 'Edit';  
        shareRule.UserOrGroupId = opportunity.Instructor__c;  
  
        // add share object to list  
        opportunitiesToShare.add(shareRule);  
        // insert list  
    }  
    insert opportunitiesToShare;  
}
```


Tests and Coverage



Tests Ran	5
Pass Rate	100%
Fail Rate	0%
Skip Rate	0%
Test Run Id	7074L000000LtX2
Test Execution Time	20846 ms
Org Id	00D4L000000Du8hUAC
Username	muddasir.ahmed@hotmail.com
Org Wide Coverage	100%



Reflection and retrospection