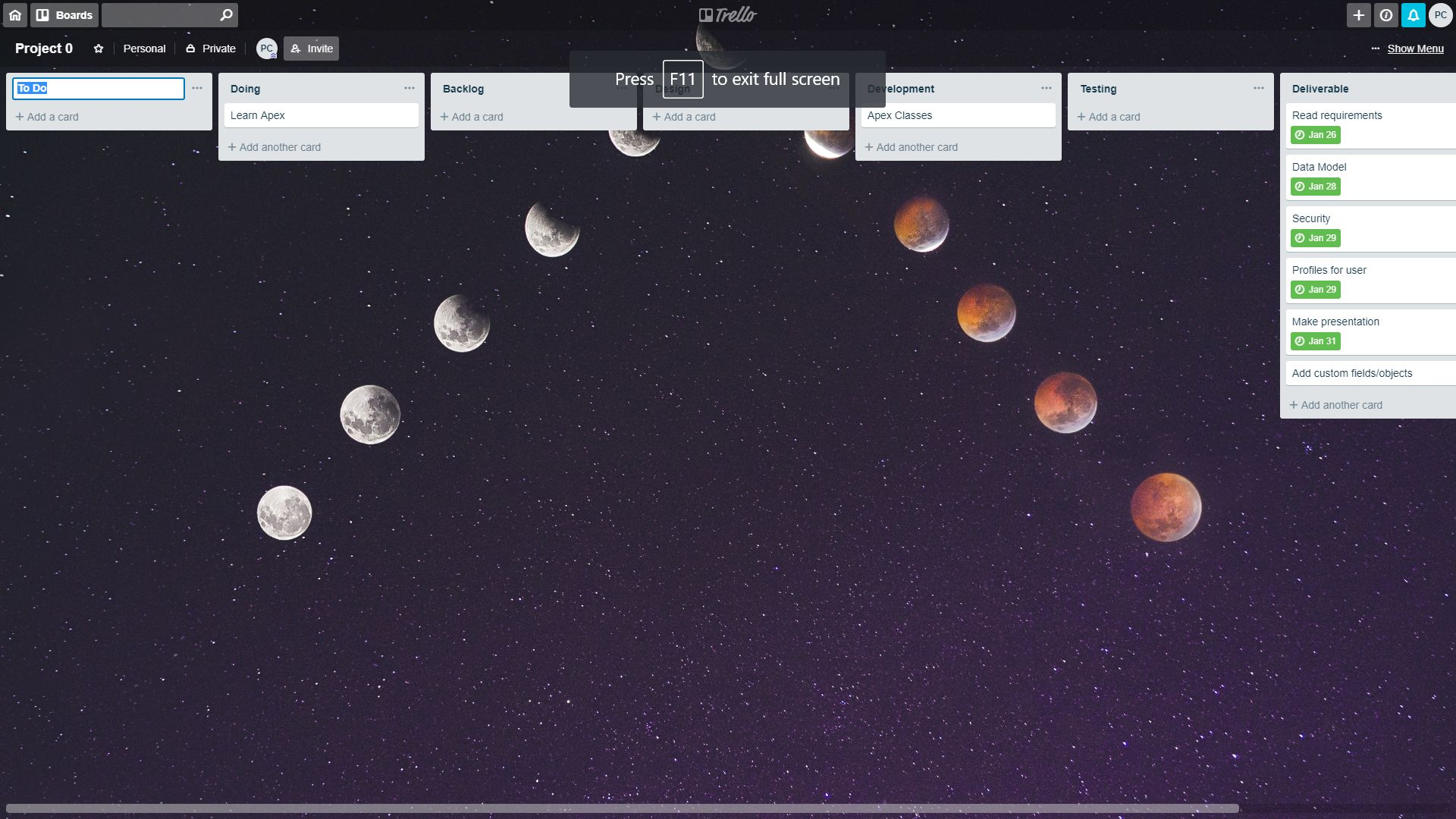# Project 0

By Patrick Chidueme

Project 0

- Create a banker app to model gow a bank would act
- User is a bank employee
- Create transactions
- See bank accounts
- Create and approve loans
- Add customers

To Do

+ Add a card

Doing   ...

Learn Apex

+ Add another card

Backlog

+ Add a card

Press F11 to exit full screen

Design

+ Add a card

Development   ...

Apex Classes

+ Add another card

Testing   ...

+ Add a card

Deliverable

Read requirements
Jan 26

Data Model
Jan 28

Security
Jan 29

Profiles for user
Jan 29

Make presentation
Jan 31

Add custom fields/objects

+ Add another card

Schema Builder

Close | Auto-Layout | View Options ▼

Legend

- Lookup Relationship
- Master-Detail Relationship
- | Required Field

Account Transaction

Field	Type
Account	Master-Detail(Bank Account)
Account Transaction ID	Auto Number
Amount	Currency(16, 2)
Created By	Lookup(User)
Last Modified By	Lookup(User)
Type	Formula (Text)

Bank Account

Field	Type
Account ID	Auto Number
Balance	Formula (Currency)
Co-Owner	Lookup(Contact)
Created By	Lookup(User)
Last Modified By	Lookup(User)
Owner	Lookup(User+1)
Owner	Lookup(Contact)
Starting Balance	Currency(16, 2)
Status	Picklist
Sum Of Transcations	Roll-Up Summary (SUM Account Trans
Type	Picklist

Loan Transaction

Field	Type
Amount	Currency(16, 2)
Balance	Formula (Currency)
Created By	Lookup(User)
Last Modified By	Lookup(User)
Loan	Master-Detail(Loan)
Transaction ID	Auto Number
Type	Formula (Text)

Loan

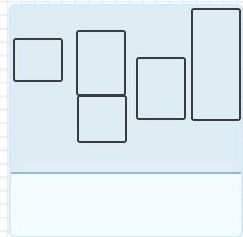| Field	Type
Created By	Lookup(User)
Last Modified By	Lookup(User)
Loan Approved	Checkbox
Loan Balance	Formula (Currency)
Loan ID	Auto Number
Loan Interest	Percent(5, 3)
Loan Owner	Lookup(Contact)
Loan Principal	Currency(16, 2)
Loan Term	Number(3, 2)
Owner	Lookup(User+1)
Sum Of Transcations	Roll-Up Summary (SUM Loan Transact

Contact

Field	Type
Account Name	Lookup(Account)
Assistant	Text(40)
Asst. Phone	Phone
Bank	Text(50)
Birthdate	Date
Clean Status	Picklist
Contact Owner	Lookup(User)
Created By	Lookup(User)
Data.com Key	Text(20)
Department	Text(80)
Description	Long Text Area(32000)
Do Not Call	Checkbox
Email	Email
Email Opt Out	Checkbox
Fax	Fax
Fax Opt Out	Checkbox
Home Phone	Phone
Languages	Text(100)
Last Modified By	Lookup(User)
Last Stay-in-Touch Request Date	Date/Time
Last Stay-in-Touch Save Date	Date/Time
Lead Source	Picklist
Level	Picklist

Show More Fields

Org Level Security

- User has his own login credentials
- Limits login hours and has to contact admin to reset

Setup

Home   Object Manager ▼

Quick Find

Setup Home

Lightning Experience

Lightning Usage

ADMINISTRATION

Users

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Email

PLATFORM TOOLS

Apps

Feature Settings

Einstein

SETUP
Profiles

Profile
Bank Teller

Help for this Page ❓

Find Settings...   ✕ | Clone Delete Edit Properties

Profile Overview > Login Hours ▼

Login Hours   Edit

Day	Start Time	End Time
Sunday	7:00 AM PDT	7:00 PM PDT
Monday	7:00 AM PDT	7:00 PM PDT
Tuesday	7:00 AM PDT	7:00 PM PDT
Wednesday	7:00 AM PDT	7:00 PM PDT
Thursday	7:00 AM PDT	7:00 PM PDT
Friday	7:00 AM PDT	7:00 PM PDT
Saturday	7:00 AM PDT	7:00 PM PDT

Object Level

- Objects are only able to be edited by certain profiles
- Prevents others from manhandling customer data

Record Level

- Certain records are only accessible from Banker and admin profiles to secure data
- Only Banker and System Admin have unfiltered access to all records in Bank app

Field level

- Certain fields are only accessible to admin and to bank user
- User does not have access to SumOfTransaction field due to there being no use for it

Bank   Contacts ▾   Bank Accounts ▾   Loans ▾

Loan
Patrick Chidueme

New Contact   Edit   New Opportunity   ▾

Related   **Details**

Loan ID
Loan#0007

Loan Owner
Patrick Chidueme

Loan Approved
☐

Loan Interest
1.000%

Loan Principal
$12,334.00

Loan Term
24.00

Loan Balance
$12,904.00

Sum Of Transcations
$570.00

Created By
Patrick Patrick Chidueme, 2/5/2019 6:23 PM

Owner
Patrick Patrick Chidueme

Last Modified By
Patrick Patrick Chidueme, 2/5/2019 7:23 PM

Activity

New Event   New Task   Log a Call   More

Set up an event...   Add

Filters: All time • All activities • All types   ▾

Refresh Expand All

Next Steps --------- More Steps ----------

No next steps. To get things moving, add a task or set up a meeting.

Past Activities -----------------------------

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

Load More Past Activities   ▾

Search Loans and more...

Bank

Contacts ▾   Bank Accounts ▾   Loans ▾

Loan
Patrick Chidueme

Submit for Approval   Edit

Related   **Details**   Activity

Loan ID
Loan#0007

Loan Interest
1.000%

Loan Owner
Patrick Chidueme

Loan Principal
$12,334.00

Loan Balance
$12,904.00

Loan Approved
☐

Loan Term
24.00

Created By
Patrick Patrick Chidueme, 2/5/2019 9:23 PM

Last Modified By
Patrick Patrick Chidueme, 2/5/2019 10:23 PM

Filters: All time • All activities • All types

Refresh Expand All

Next Steps   More Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activities

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

Load More Past Activities

Added Implementation

Formula field for Transaction type

Rollup summary to keep track of SumOfTransactions

Search Setup

Setup

Home | Object Manager ∨

SETUP > OBJECT MANAGER

Bank Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Triggers

Validation Rules

Validation Rules

2 Items, Sorted by Rule Name

New

RULE NAME ▲	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
CoOwneronJoint	Top of Page	If selecting a Joint Account Type a Co-Owner must be specified	✓	Patrick Chidueme, 2/4/2019, 10:23 AM
MustHaveValidStartingBalance	Starting Balance	Starting Balance must be greater than 0	✓	Patrick Chidueme, 2/5/2019, 5:28 PM

Loan Transaction

Validation Rules
1 Items, Sorted by Rule Name

1 Items, Sorted by Rule Name

New

RULE NAME ▲	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
NoNewLoans	Loan	You cannot make a new Loan from Loan Transaction Tab		Patrick Chidueme, 2/5/2019, 8:31 AM

Sidebar
- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- Triggers
- Validation Rules

Search Setup

Setup | Home | Object Manager