manipalglobal
SKILLS ACADEMY

Capstone Project Report
On
"**Salesforce application**"

Submitted by:

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Date: 28/02/2023

Internal to Wipro

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Abstract

Salesforce, Inc. is an American cloud-based software company headquartered in San Francisco, California. It provides customer relationship management (CRM) software and applications focused on sales, customer service, marketing automation, analytics, and application development.

Salesforce's main technologies are tools for customer management. Other products enable customers to create apps, integrate data from other systems, visualize data, and offer training courses.

Force.com applications are built using declarative tools, backed by Lightning and Apex, a proprietary Java-like programming language for Force.com, as well as Visualforce, a framework including an XML syntax typically used to generate HTML. The Force.com platform typically receives three complete releases a year. As the platform is provided as a service to its developers, every single development instance also receives all these updates.

In here we work on how to Set up the Company Profile, Configuring the user Interface, setting up Activities and Calendars, Configuring Search Settings, Setting up Chatter Groups, Mobile Access with salesforce.

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Introduction

Salesforce is a cloud-based software company that provides its customers with a platform to develop their own applications without following the tough steps that they used to follow in the legacy system. The software or application once created can be uploaded onto the cloud allowing the end-users to view them.

Salesforce is currently providing various software solutions and platforms for developers to create and distribute custom software/applications. Tech giants like Google, Twitter, Amazon, and Facebook are using Salesforce either in the form of SaaS or PaaS.

Salesforce developers can make an application on the cloud and share it with multiple companies across multiple domains by using Salesforce.

Talking about HR systems, every company across the globe has an HR team. Each HR team would require an HR application to store employee records. Almost all specifications for such an application would be common for all companies. So, as a developer, it would be very easy to create a Salesforce application for such specifications, post it onto the cloud, and provide it as a service to multiple clients at the same time. Maintenance of the same can be done altogether too. So basically, the problem of scalability gets eliminated.

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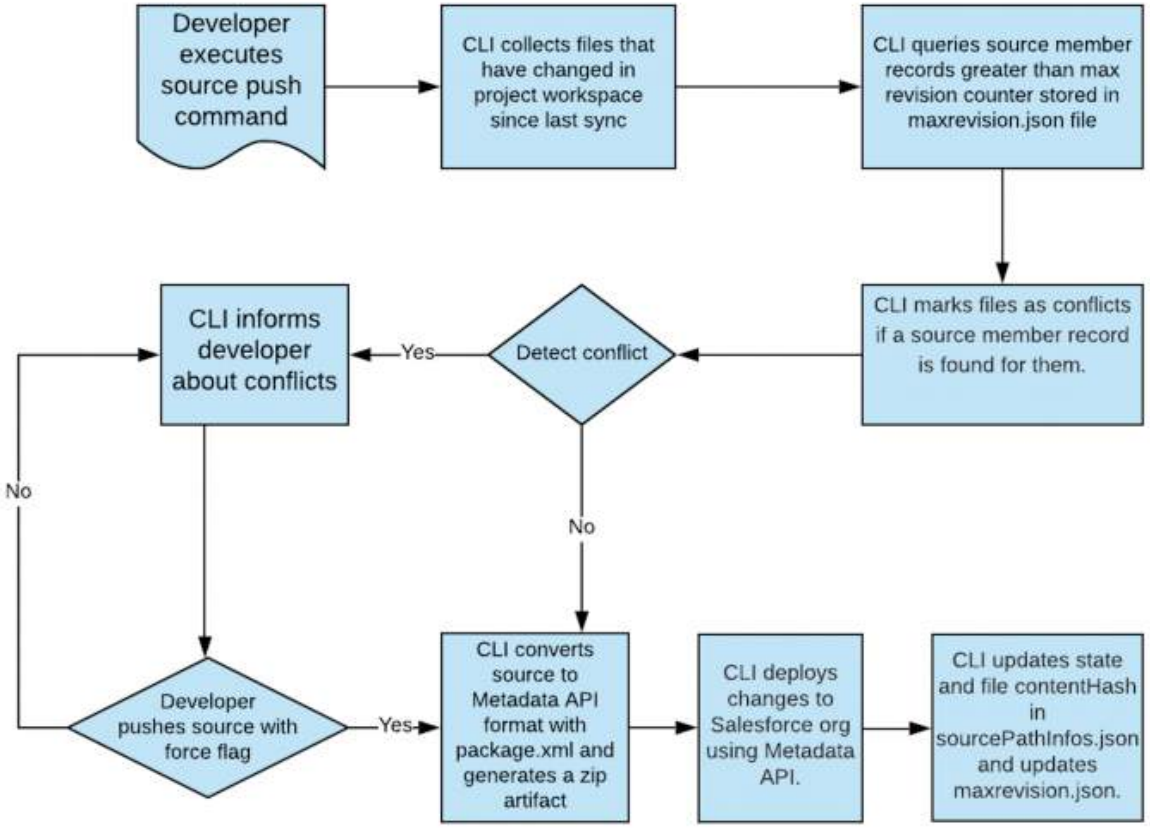
Flow of the Project



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Software Requirements

For the fastest and most stable experience, we recommend:

- An Octane 2.0 score of 30,000 or greater
- Network latency of 150 ms or less
- Download speed of 3 Mbps or greater
- At least 8 GB of RAM, with 3 GB available for Salesforce browser tabs

Minimum requirements are:

- An Octane 2.0 score of 20,000 or greater
- Network latency of 200 ms or less
- Download speed of 1 Mbps or greater
- At least 5 GB of RAM, with 2 GB available for Salesforce browser tabs

OR

Requirements	
Windows	
Operating system	Windows 8.1 64-bit, Windows 8 64-bit, Windows 7 Service Pack 1 64-bit, Windows Vista Service Pack 2 64-bit
CPU	Core 2 Quad Q6600 at 2.4 GHz or AMD Phenom 9850 at 2.5 GHz
Memory	4 GB RAM
Free space	65 GB of free space
Graphics hardware	DirectX 10-compatible GPU: GeForce 9800GT 1GB or ATI Radeon HD 4870 1GB
Sound hardware	DirectX 10 compatible sound card

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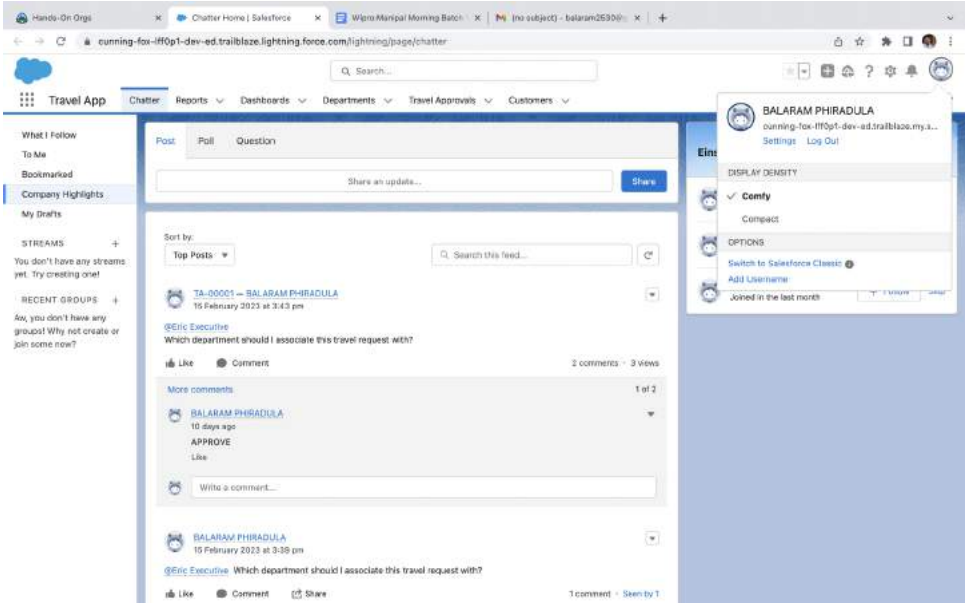
Capstone Project Module 1

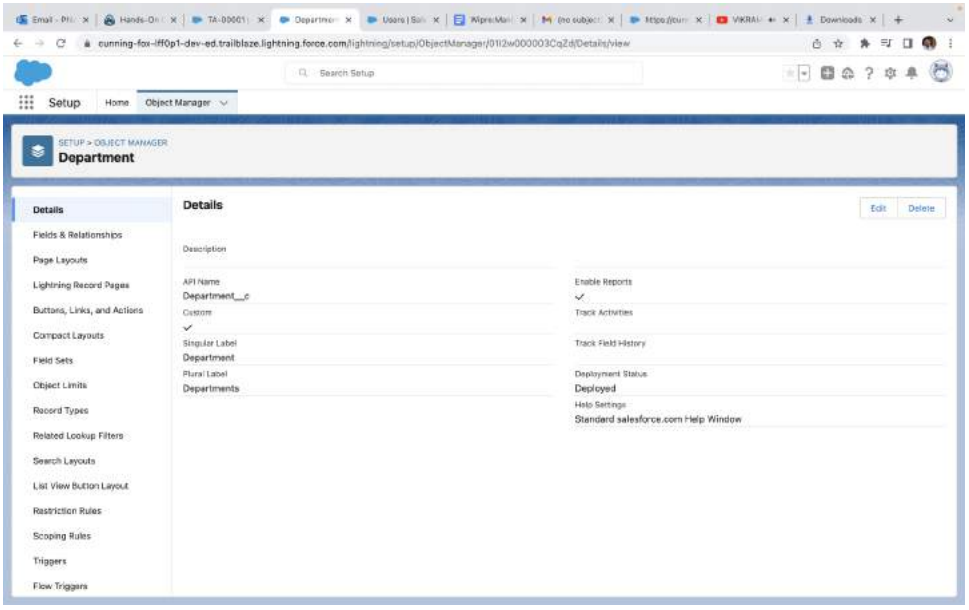
Exercise –1

Step – 1



Step –2

Created Department Object



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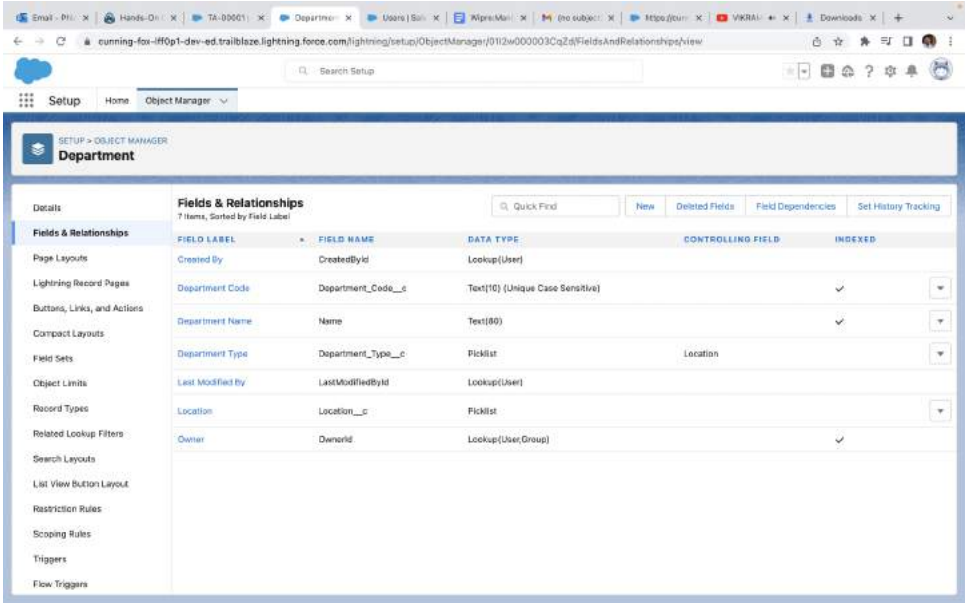
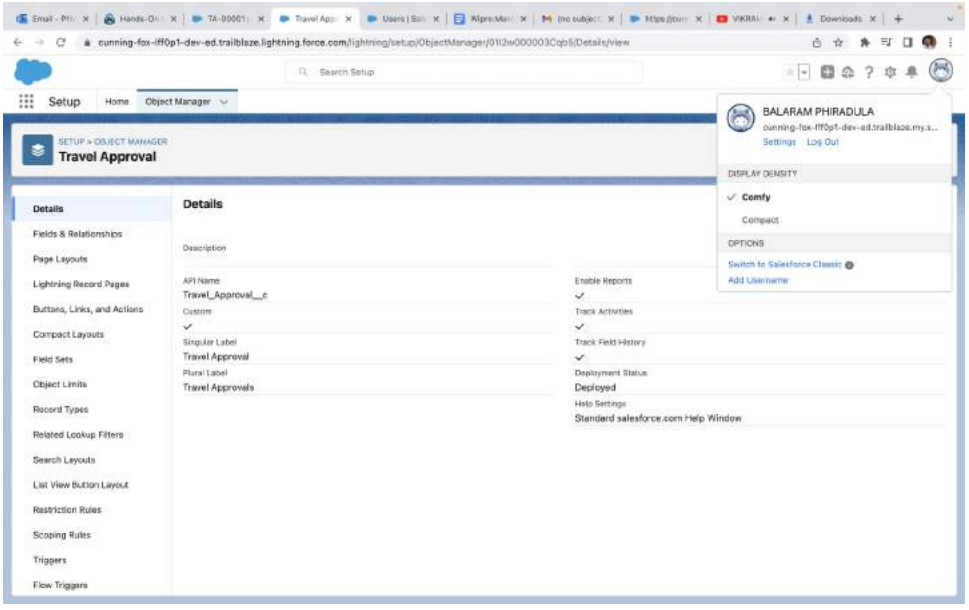
Step – 3

Created all the required Custom fields



Step – 4

Created Travel Approval Object



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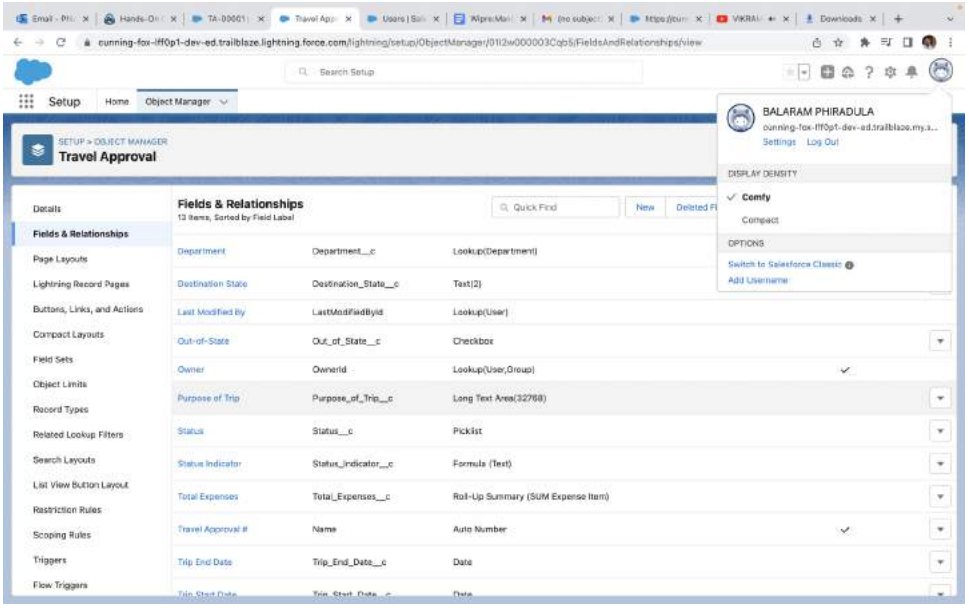
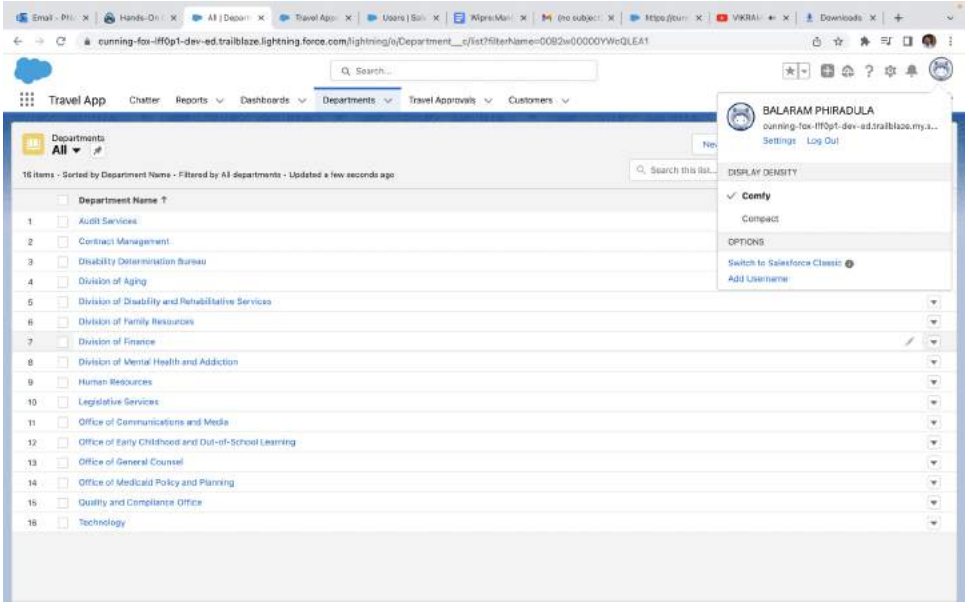
Created the required fields



Step – 5

Imported Department.CSV file using Data Import Wizard



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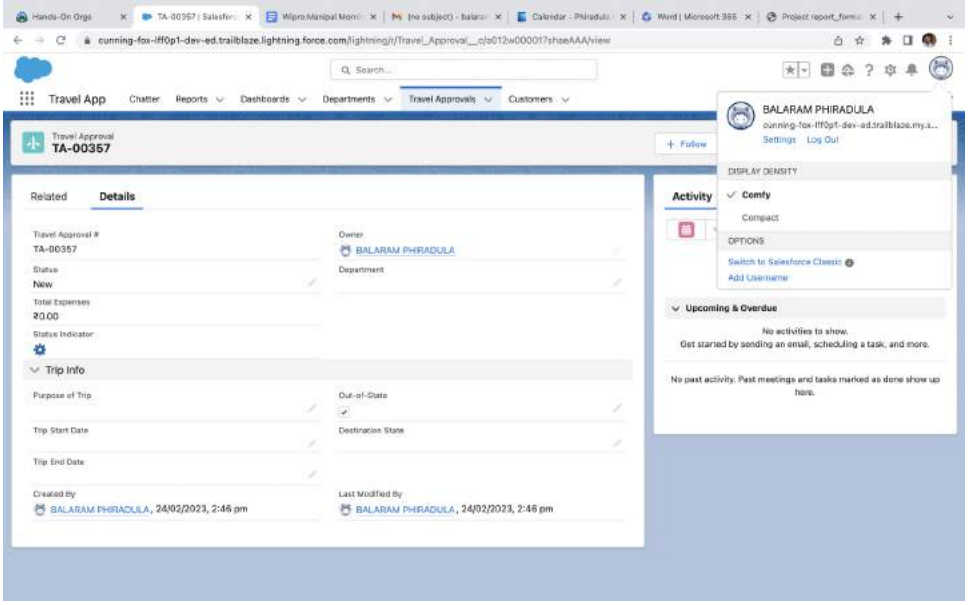
Exercise –2

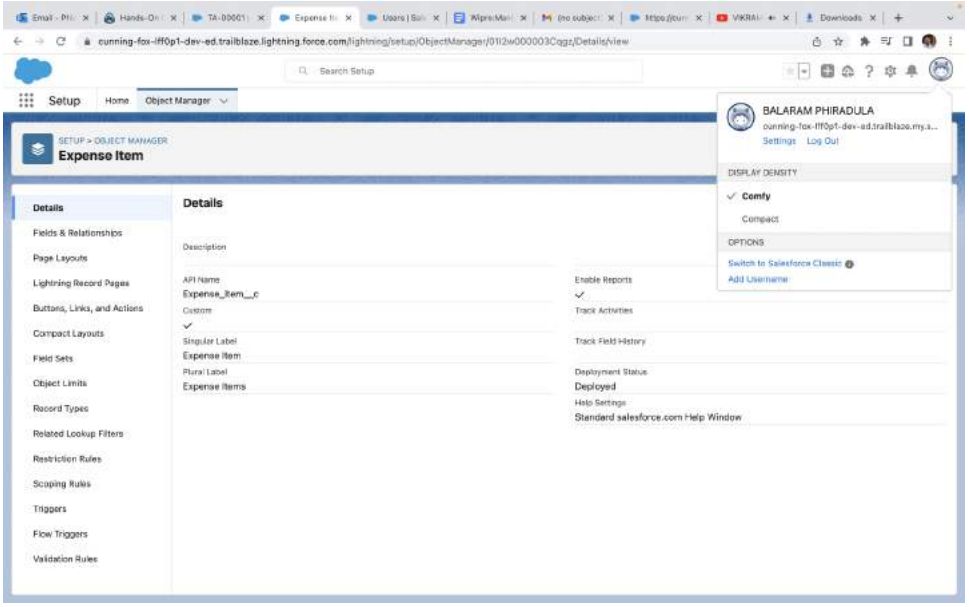
Step – 1

Created Travel Approval record



Step –2

Created Expense Item Custom Object



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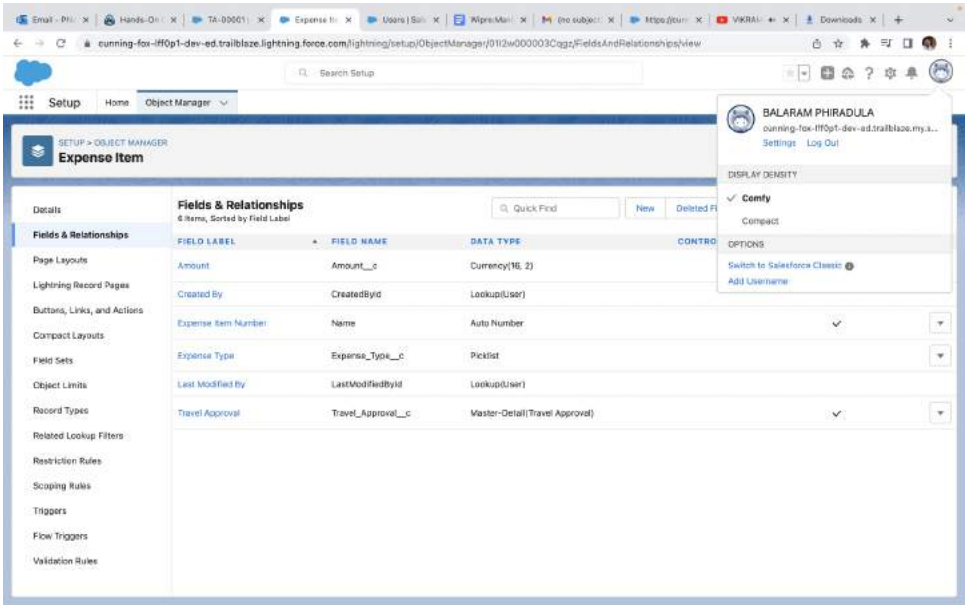
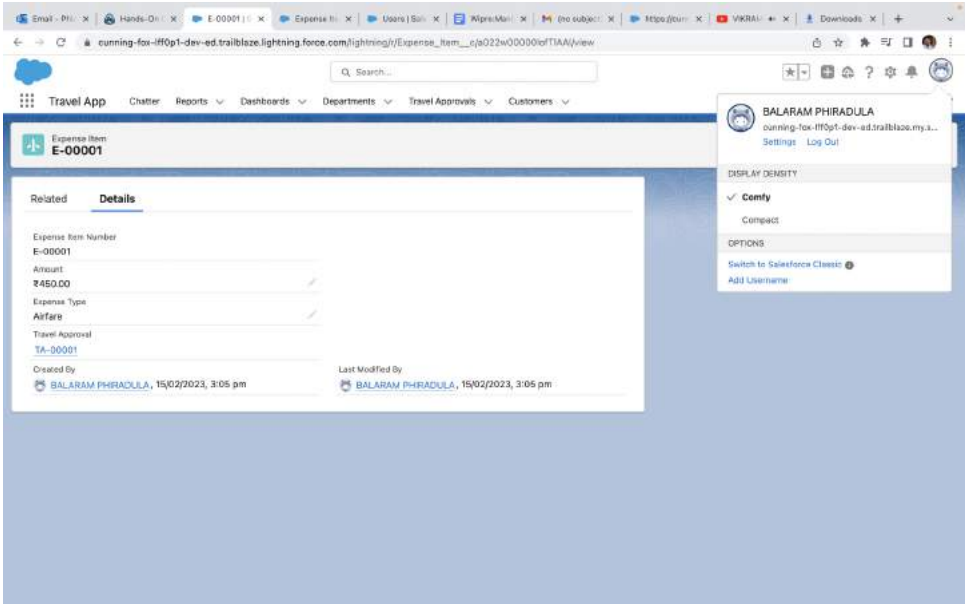
CStep –3

Created Custom fields



Step – 4

Create Records



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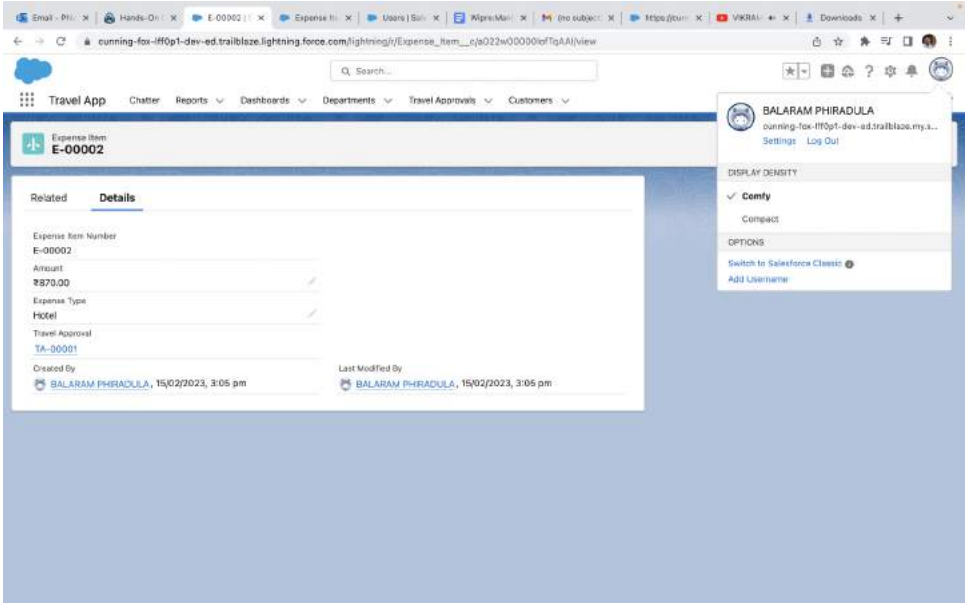
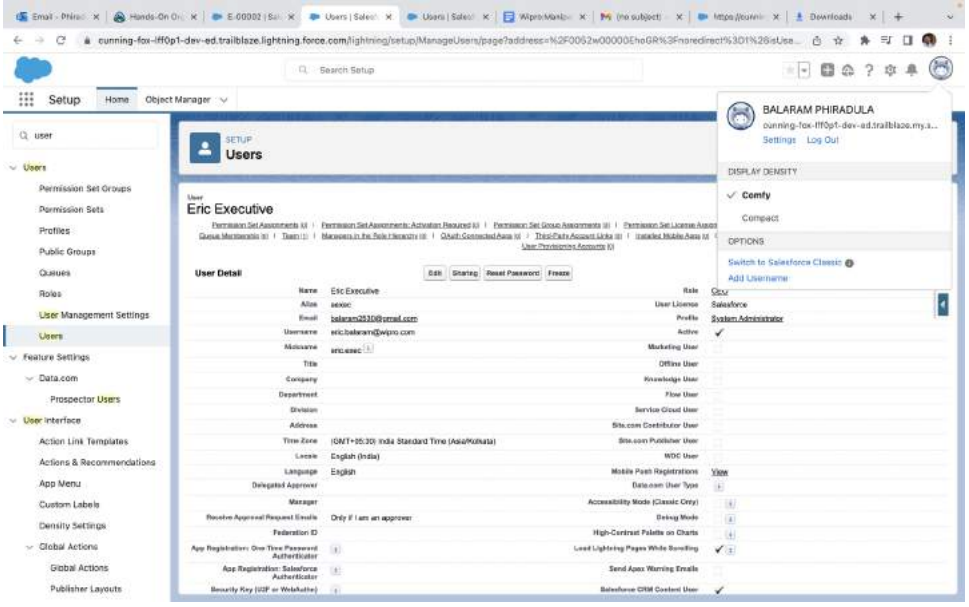


Step – 5

Created User Eric Executive



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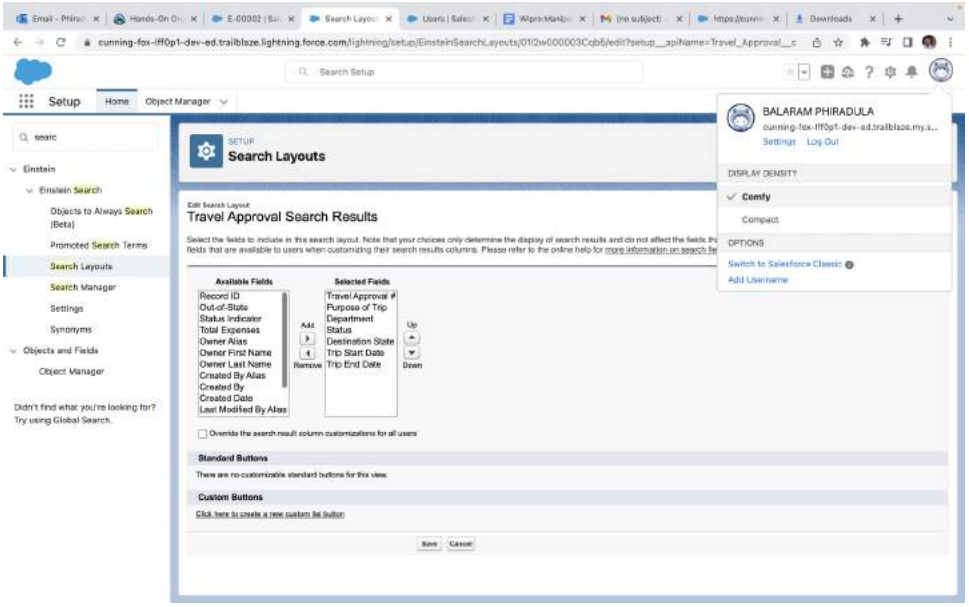
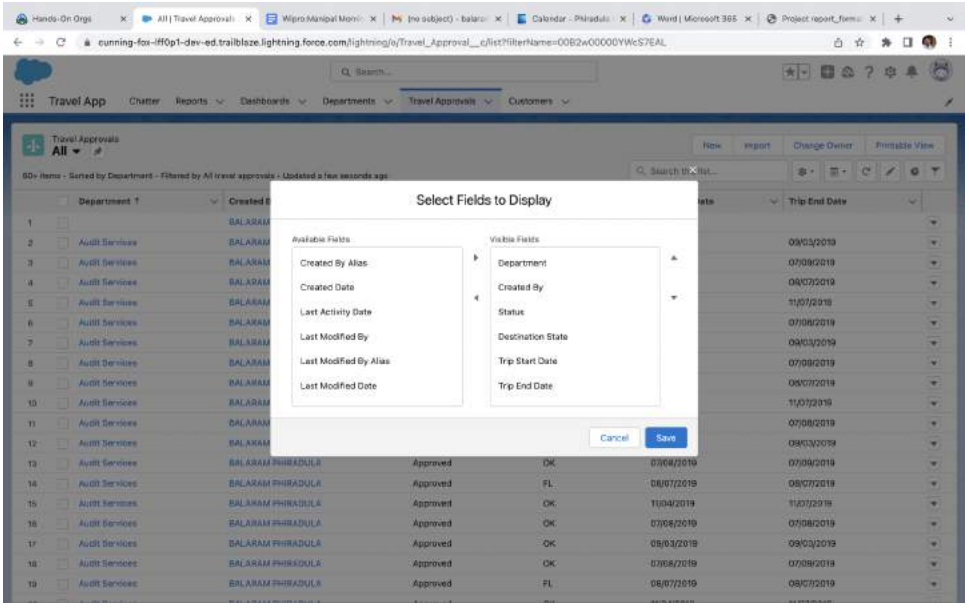
Step –6

Customized the Travel Approval Default Serach



Step –7

Selected all the fields to Display



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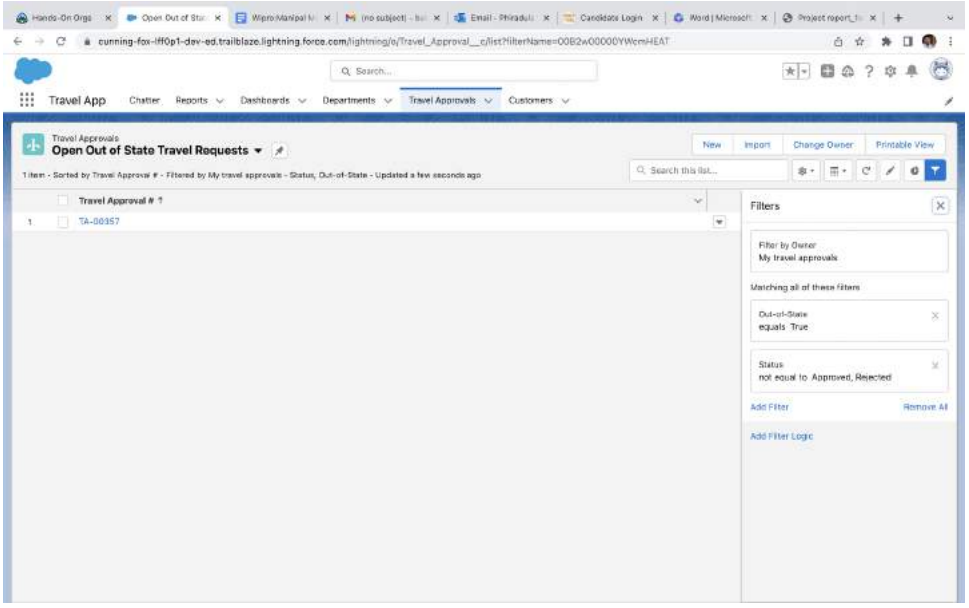
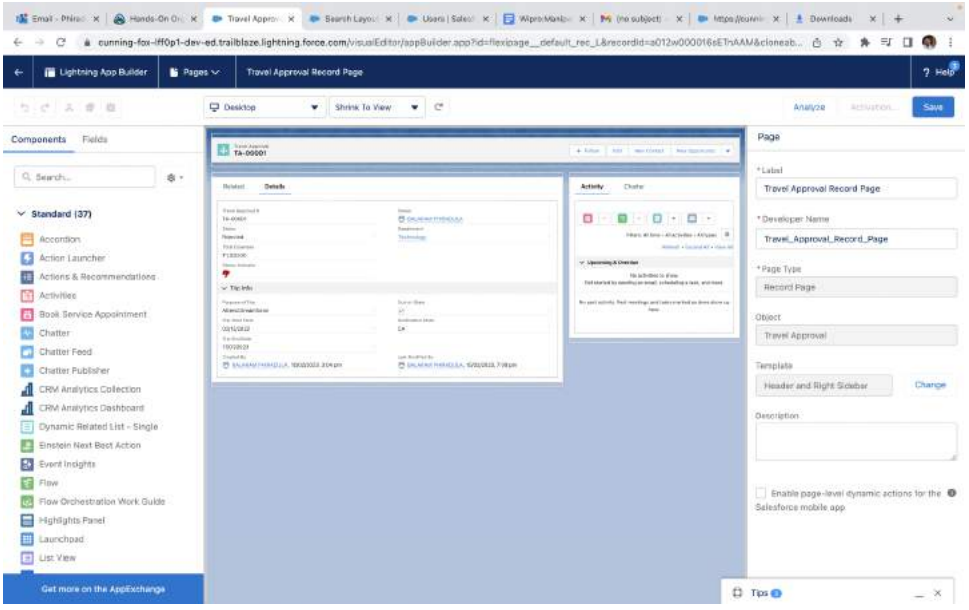
Step – 8

Created Travel Approval custom list view Open Out of State Travel Requests

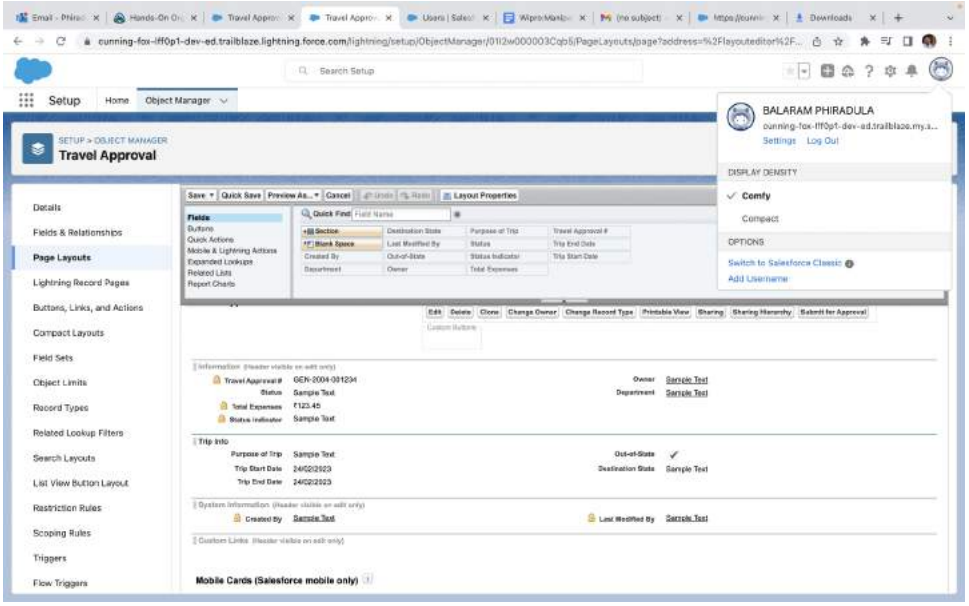


Step – 9

Customized Travel Approval Page Layout

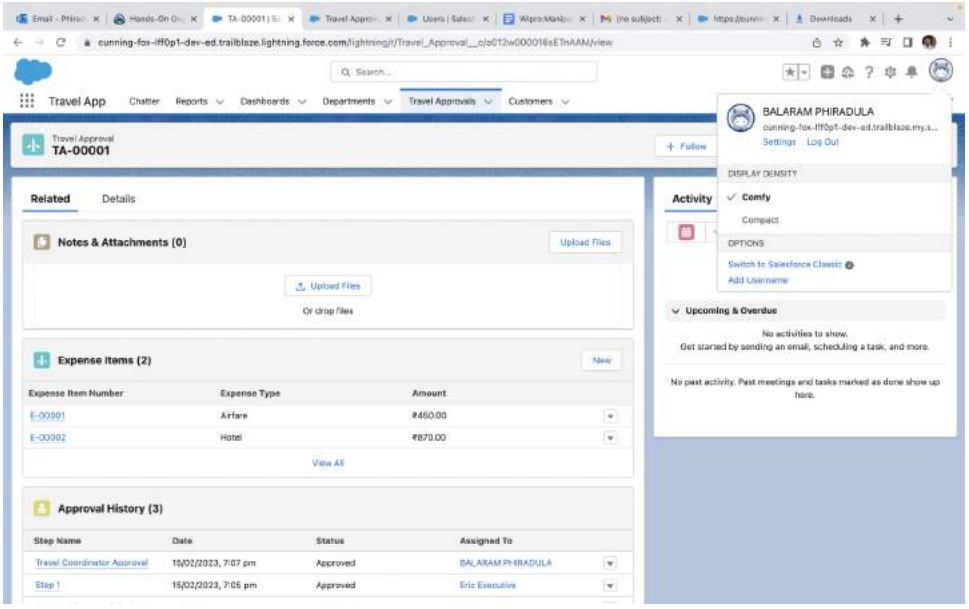


Internal to Wipro



Step – 10

Customized the Expense Item Related list under Travel Approval Page Layout



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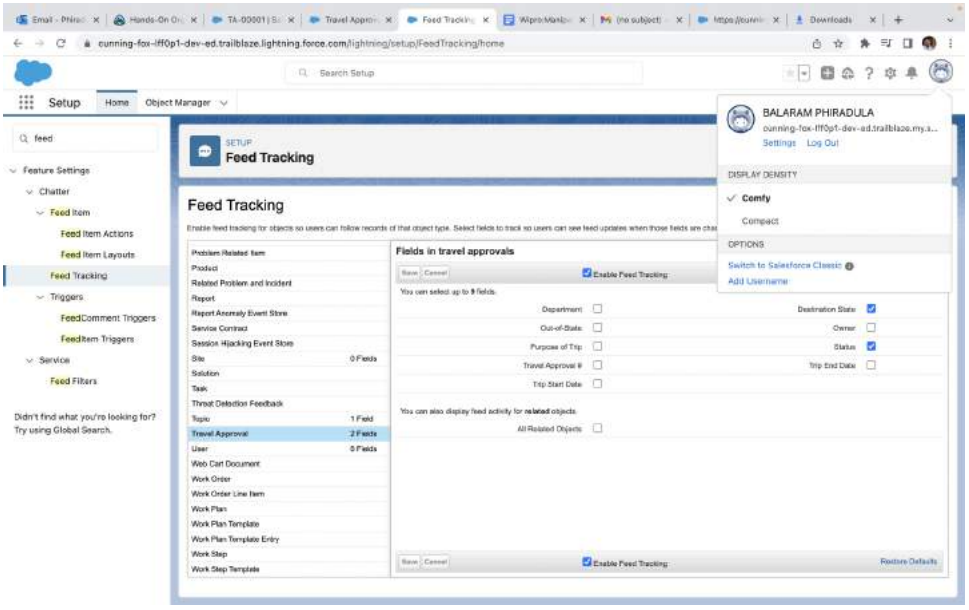
Step – 11
Enable Field Tracking



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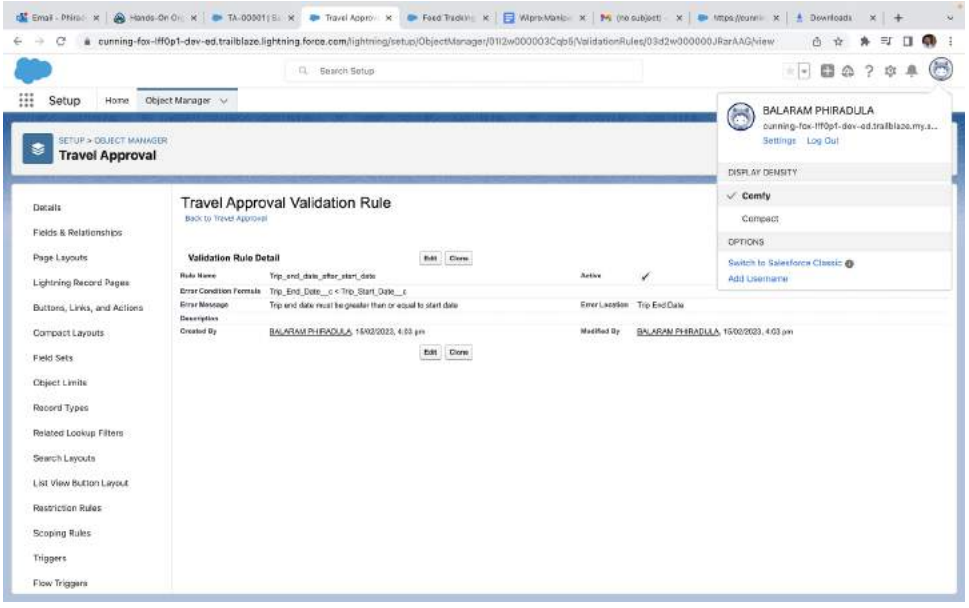
Capstone Project Module 2

Exercise –1

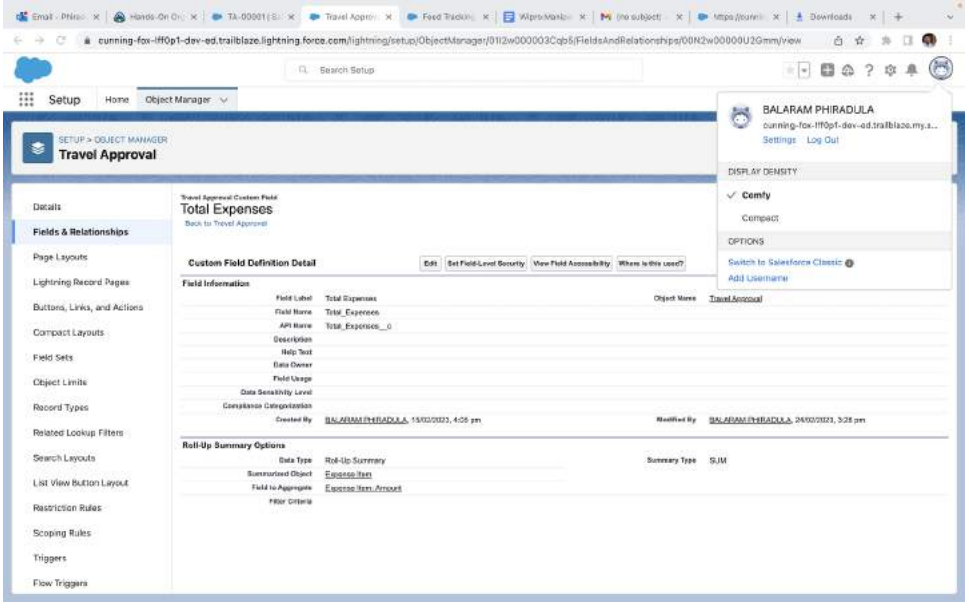
Step –1

Created Trip End Date after start date validation rule



Step – 2

Created a Roll up summary field total expenses



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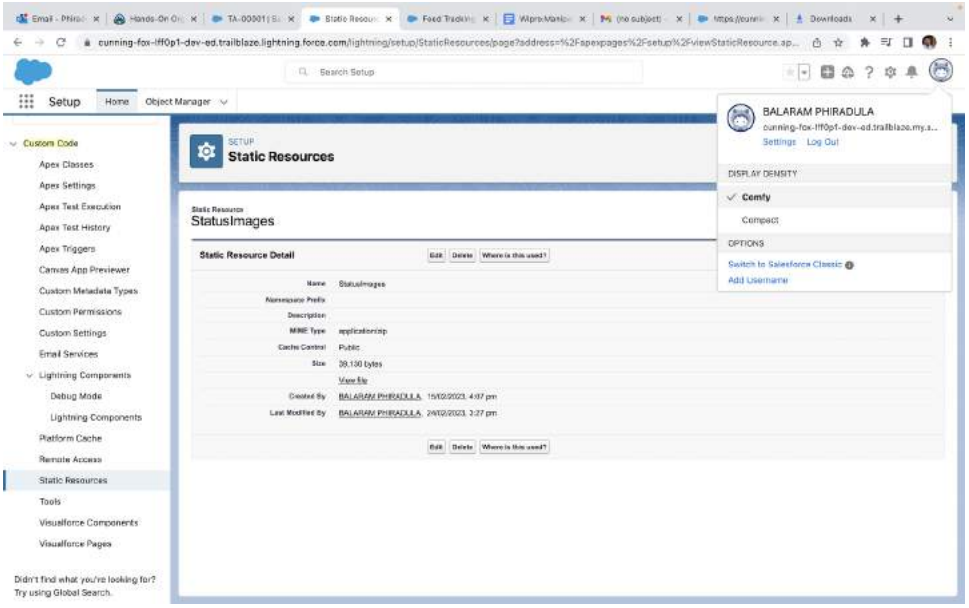
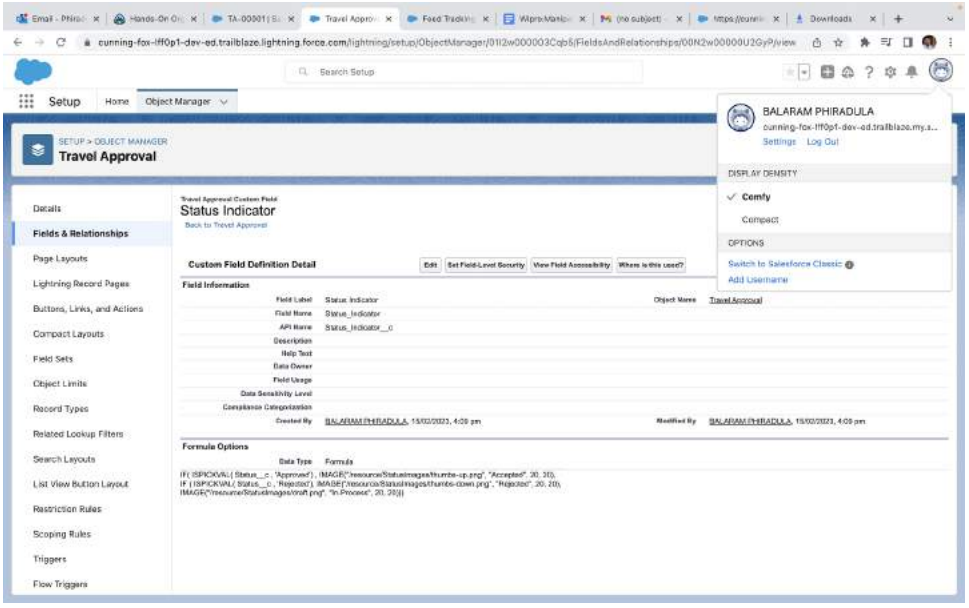
Step – 3

Created a formula field Status Images



Step – 4

Created a formula field Status Indicator



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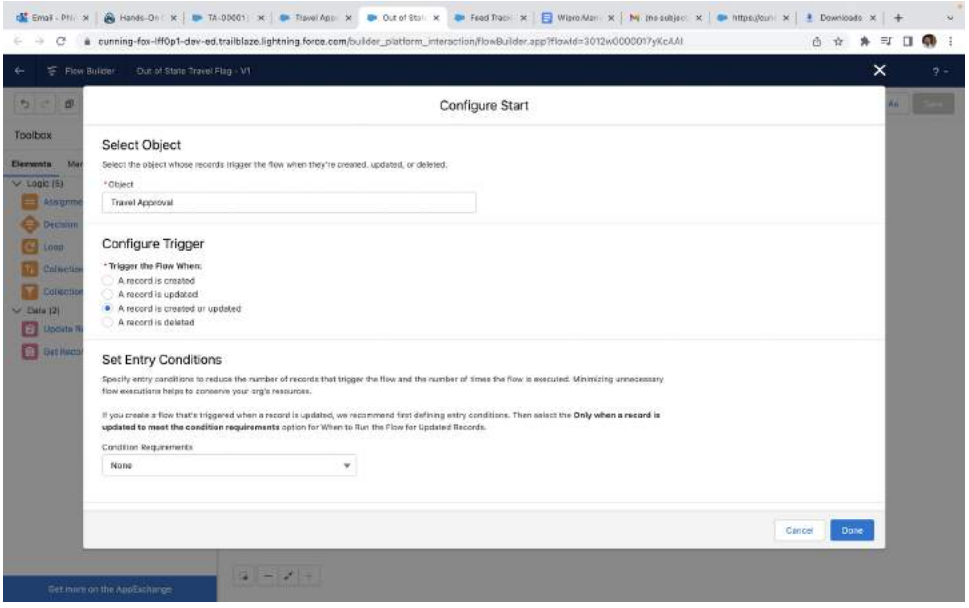
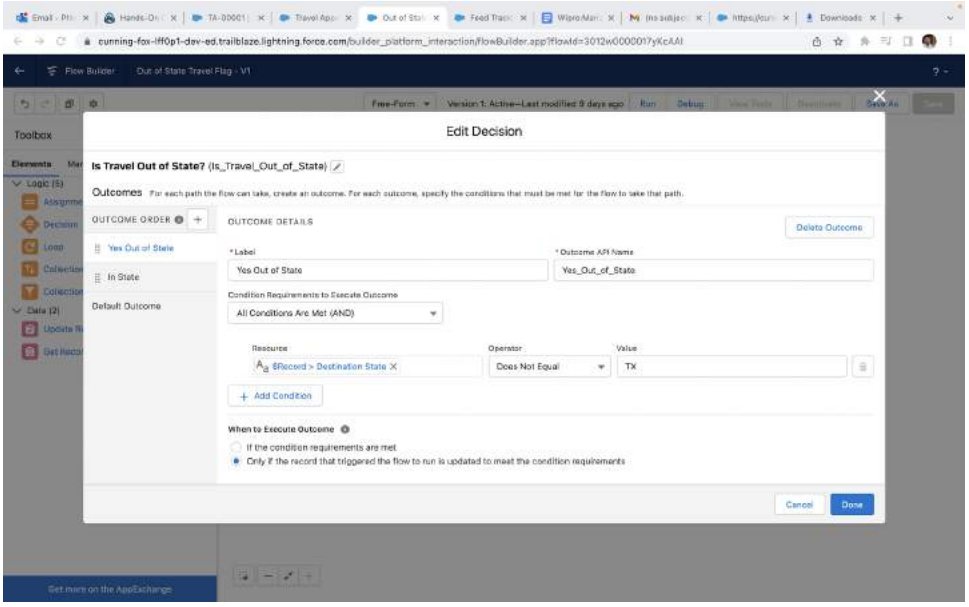
Step –5

Created a record - Trigger flow

Decision Block



Updated Travel Approval Record (Yes out of state)



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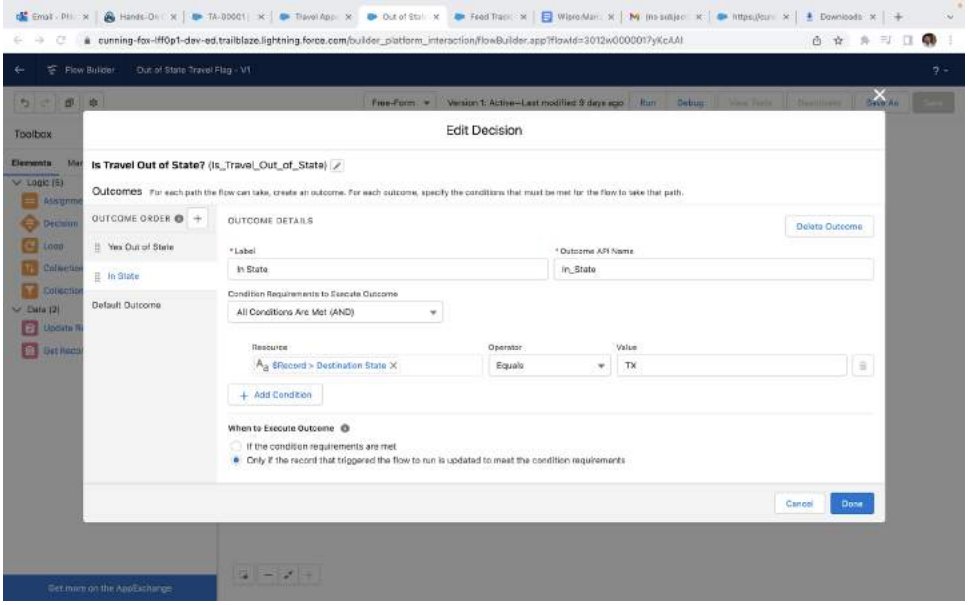
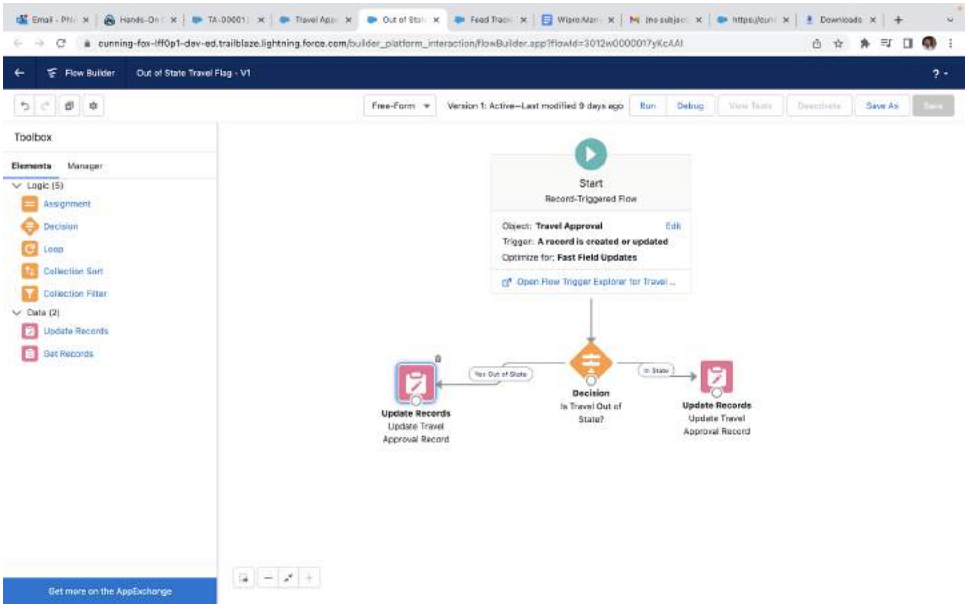
Updated Travel Approval Record (In state)



Out of State Travel Flag (flow)



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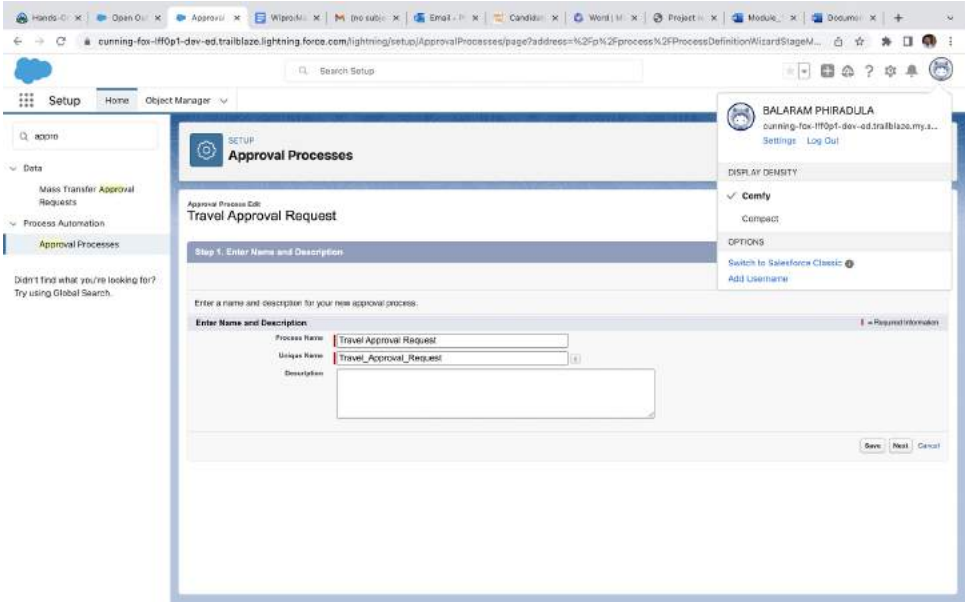
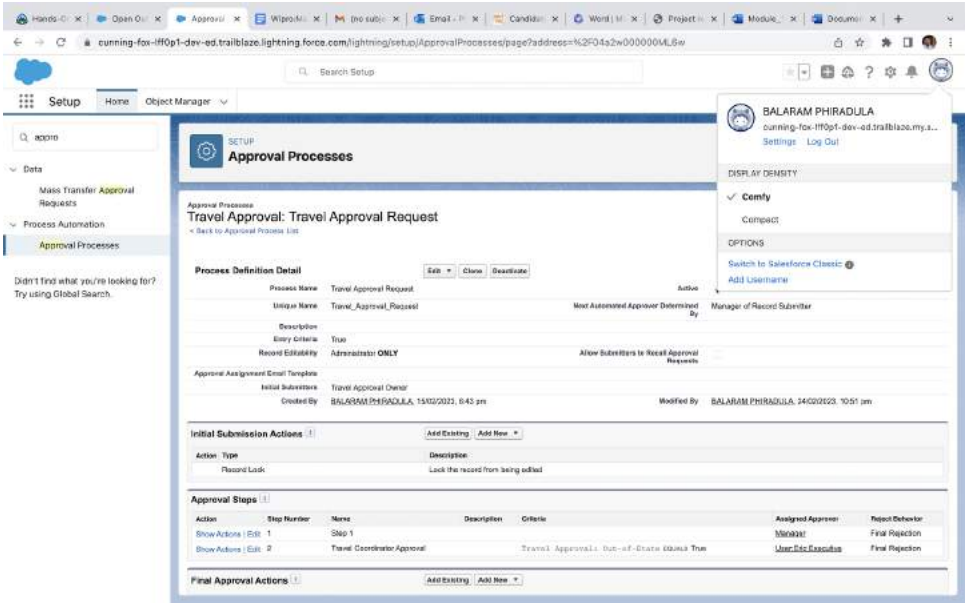
Step – 6

Created an approval process Travel Approval Request





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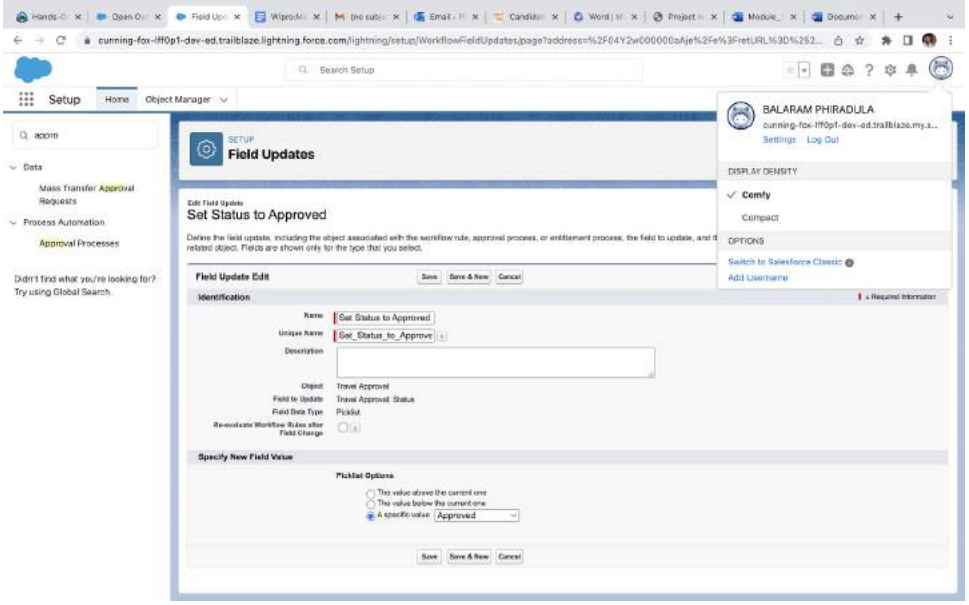
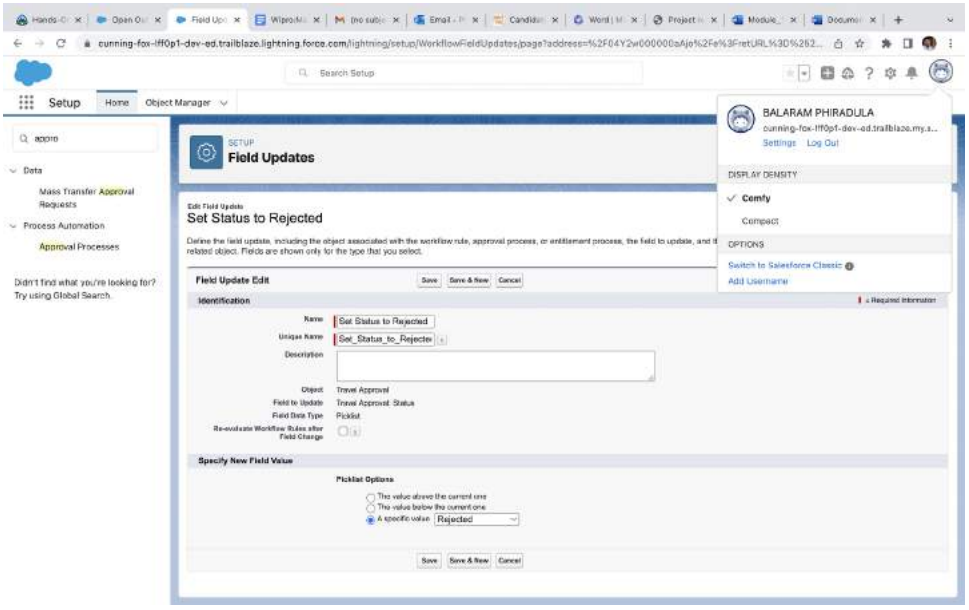
Final Approval Actions



Final Rejection Actions



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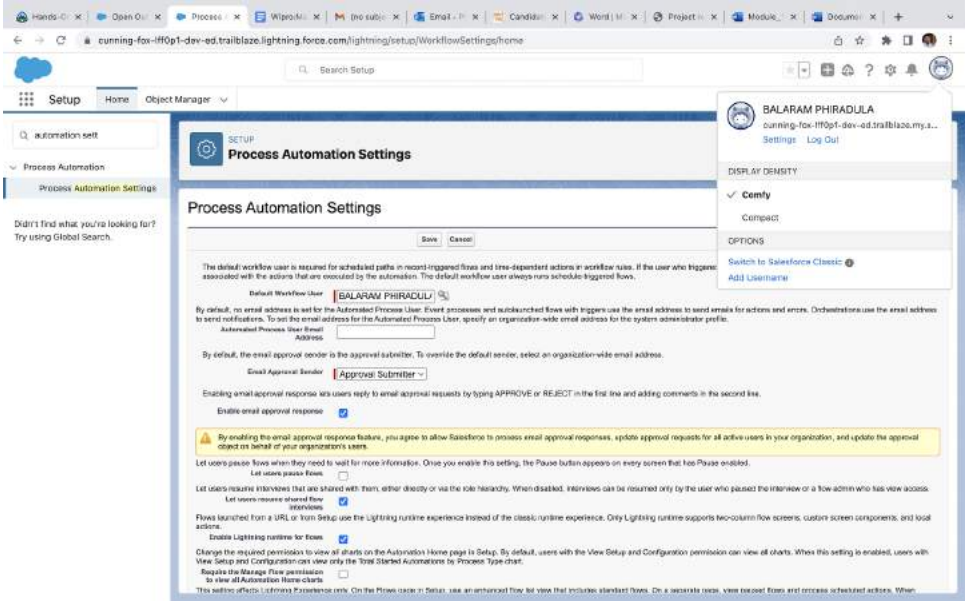
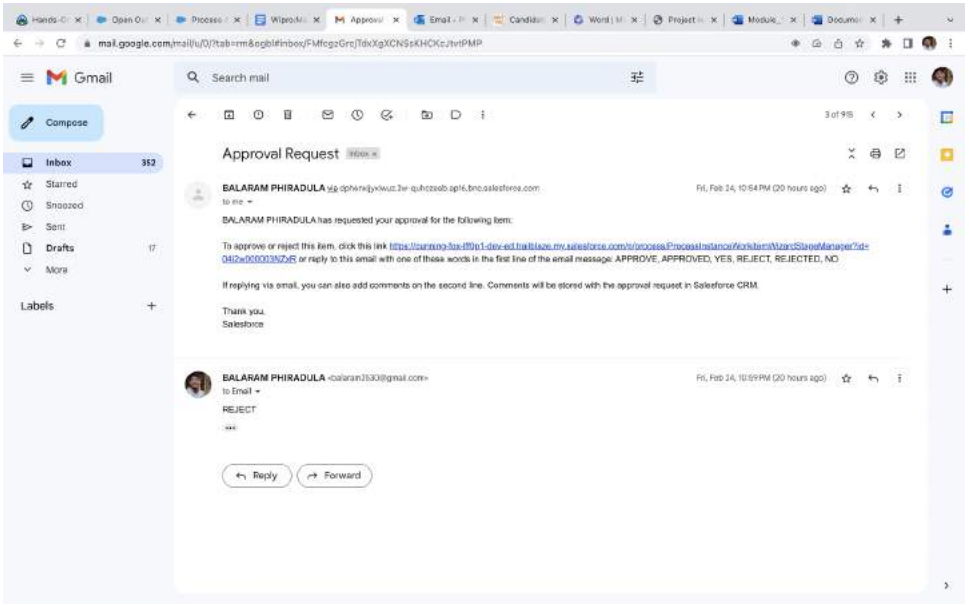
Testing the Approval Process



Received an Email



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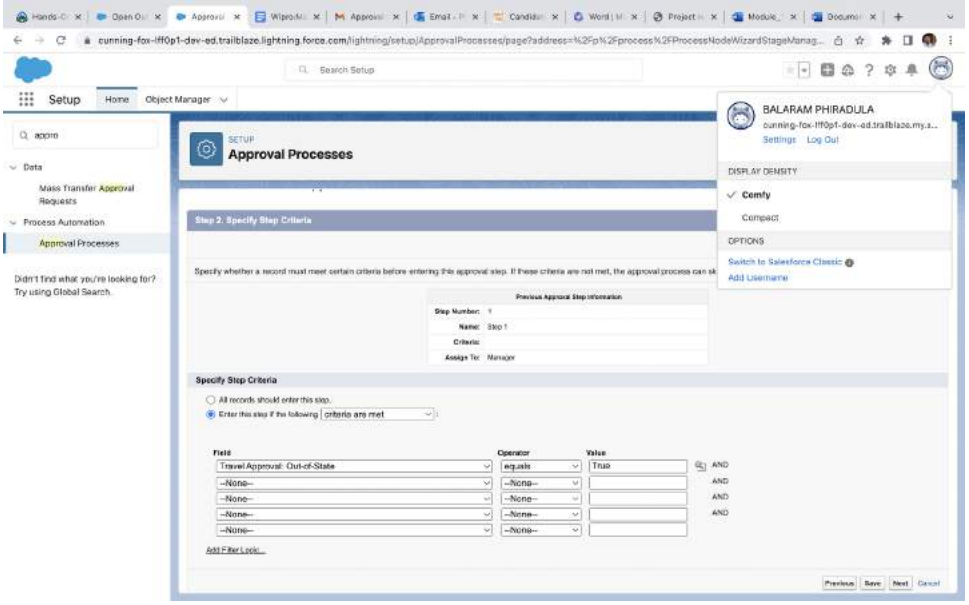
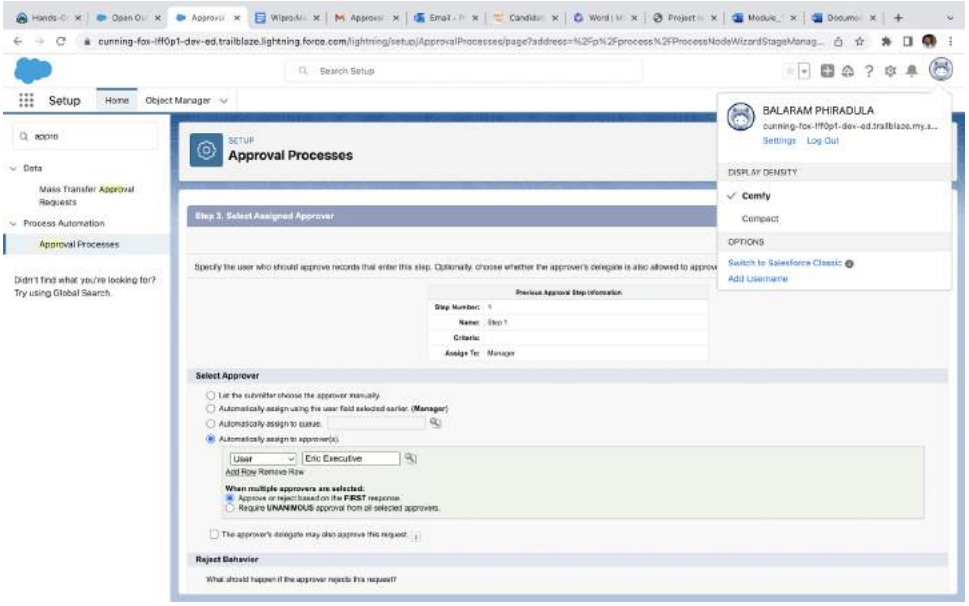
Assigned to Eric Executive





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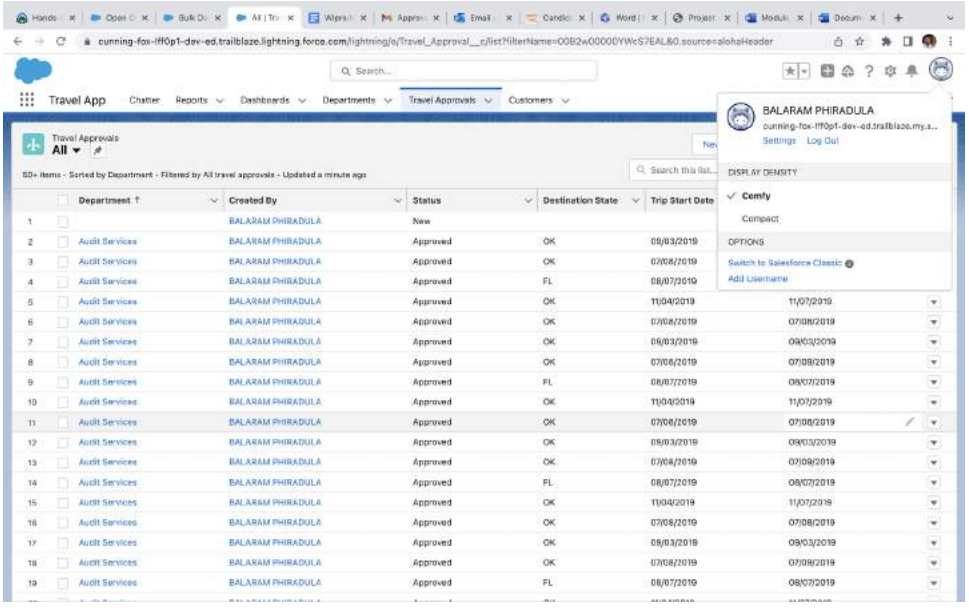
Exercise – 2

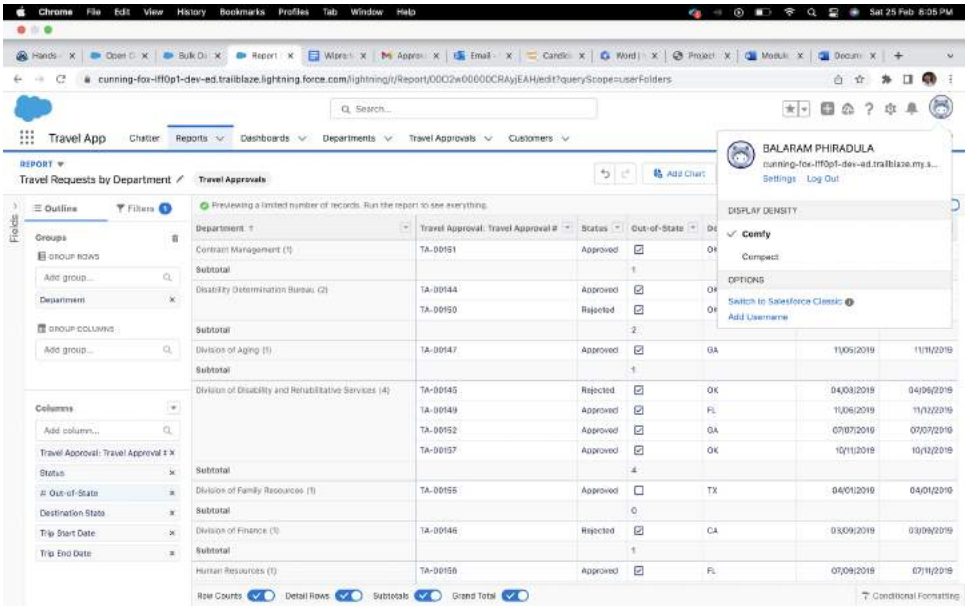
Step –1

Imported Travel Approval Records



Step – 2

Created a Report on Travel Requests by Department



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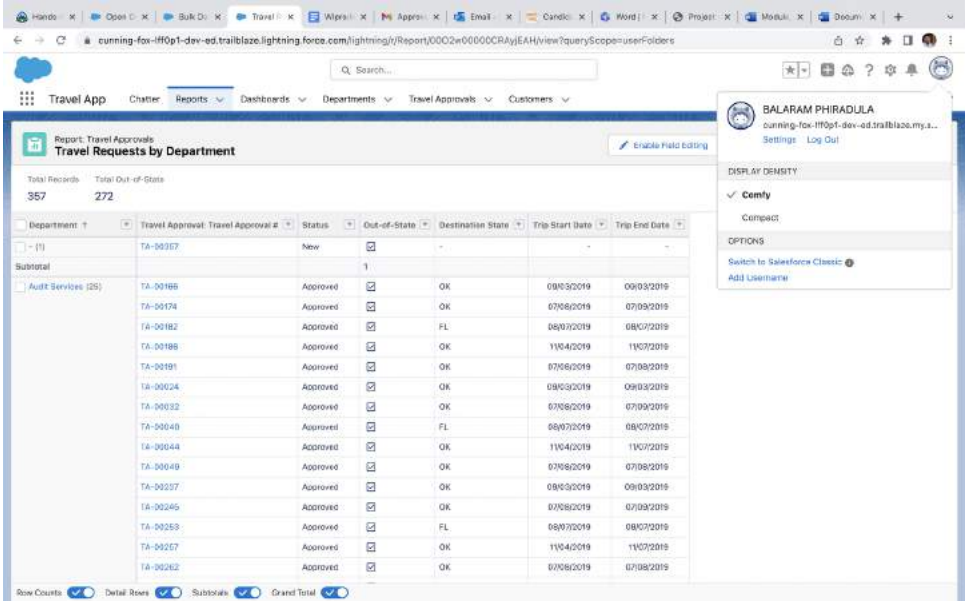
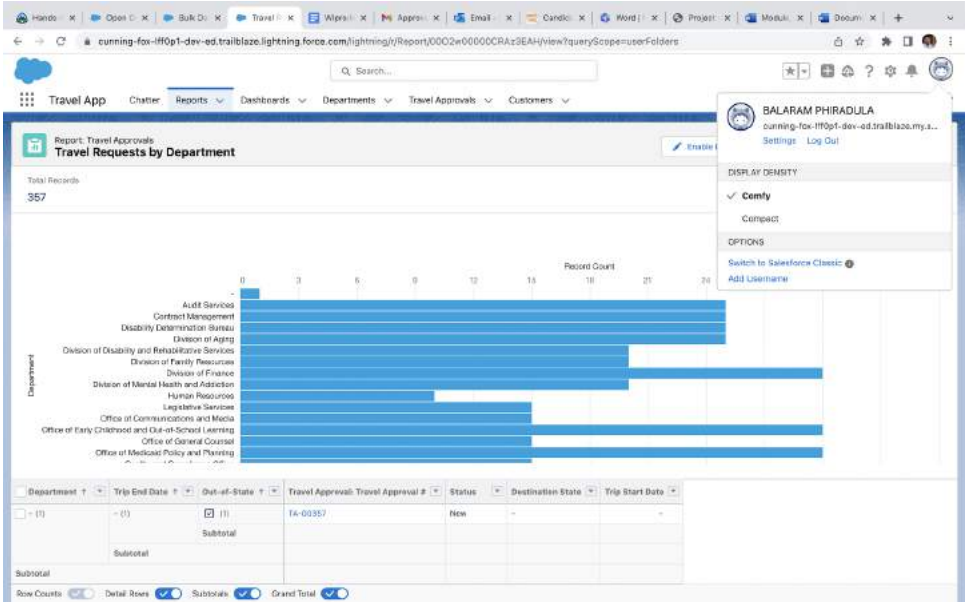
After Testing

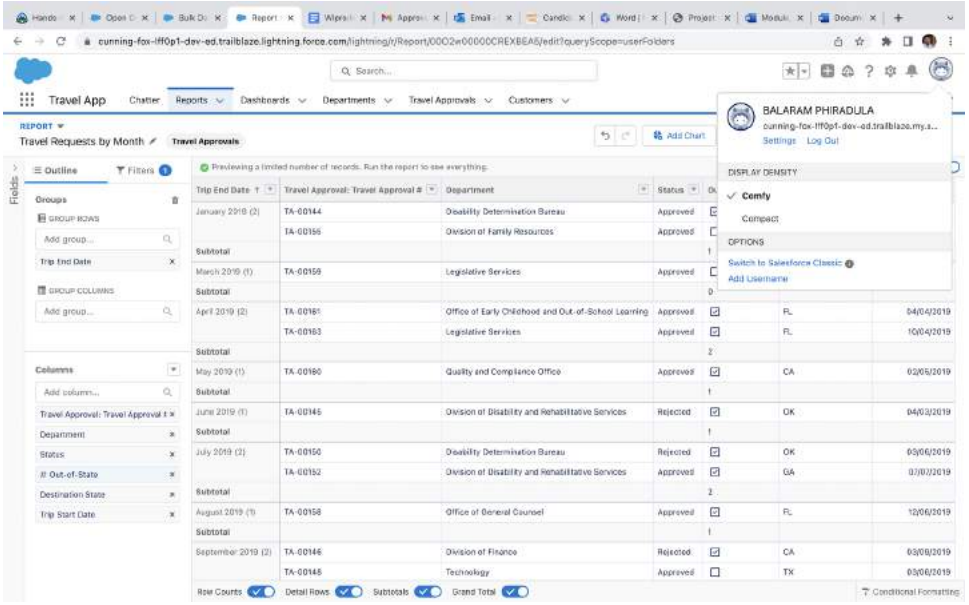


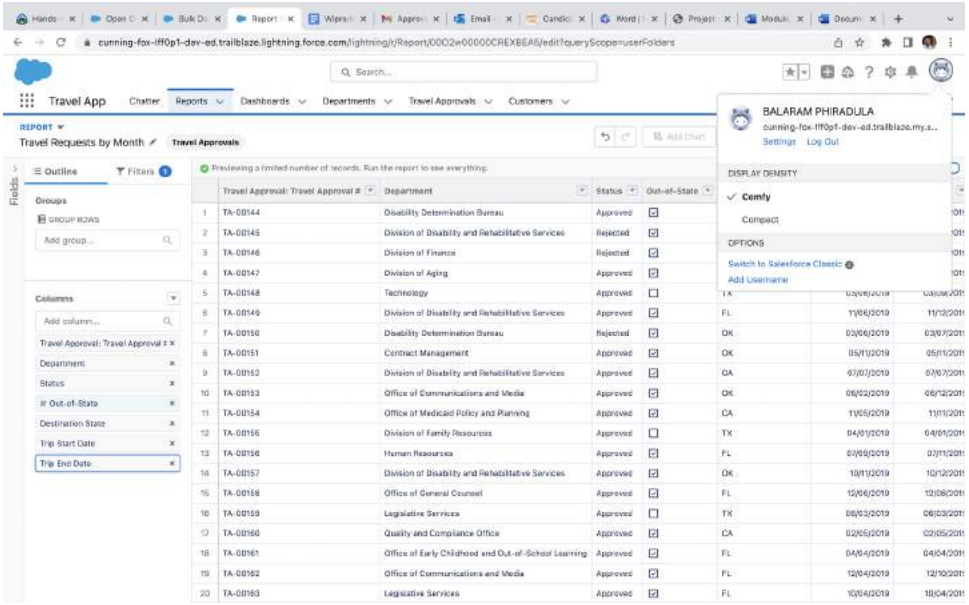


Internal to Wipro

Step – 3

Created a Travel Requests by Monthly Report





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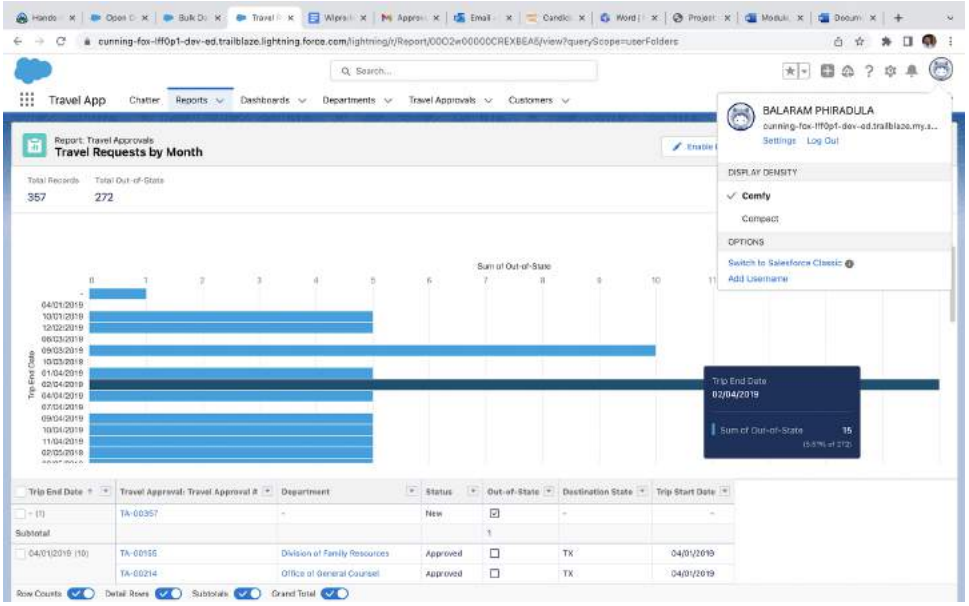
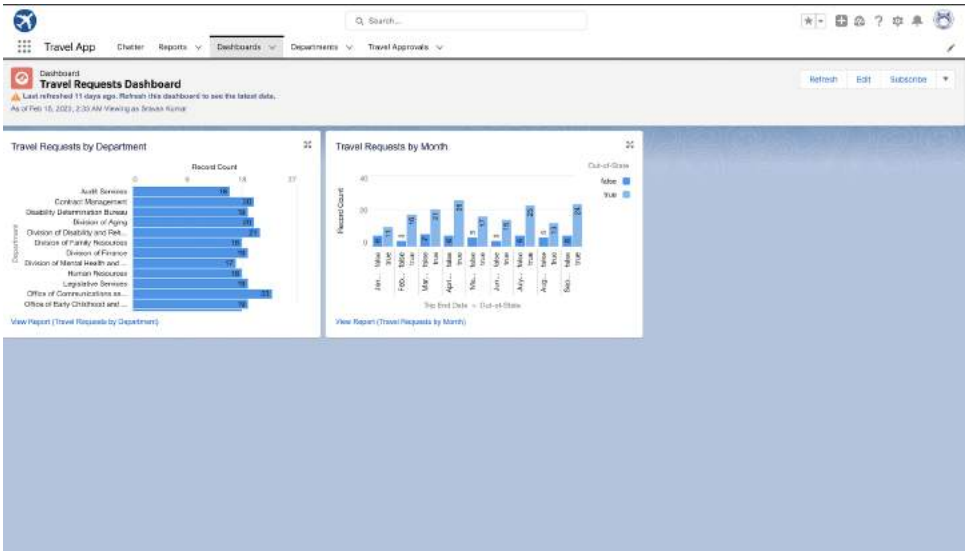


Step – 4

Created a Report and Dashboard for Travel Approvals

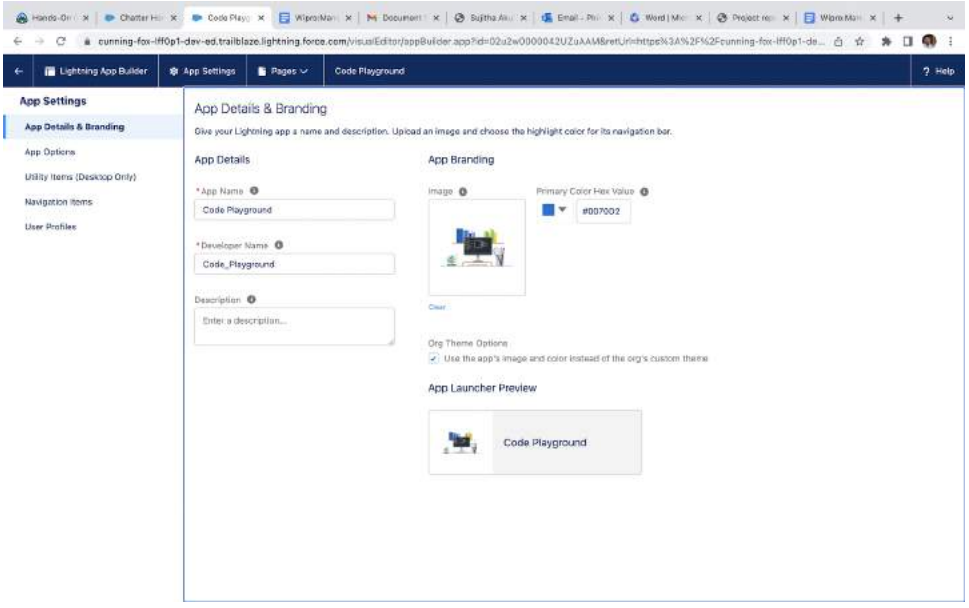


Internal to Wipro

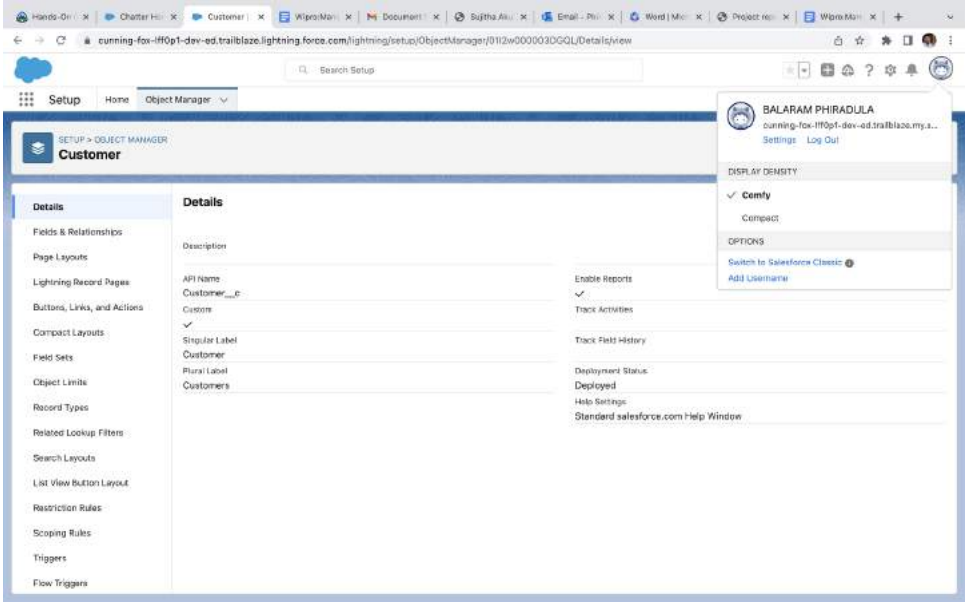
Capstone Project Module 3

Exercise – 1

Created Code Playground App

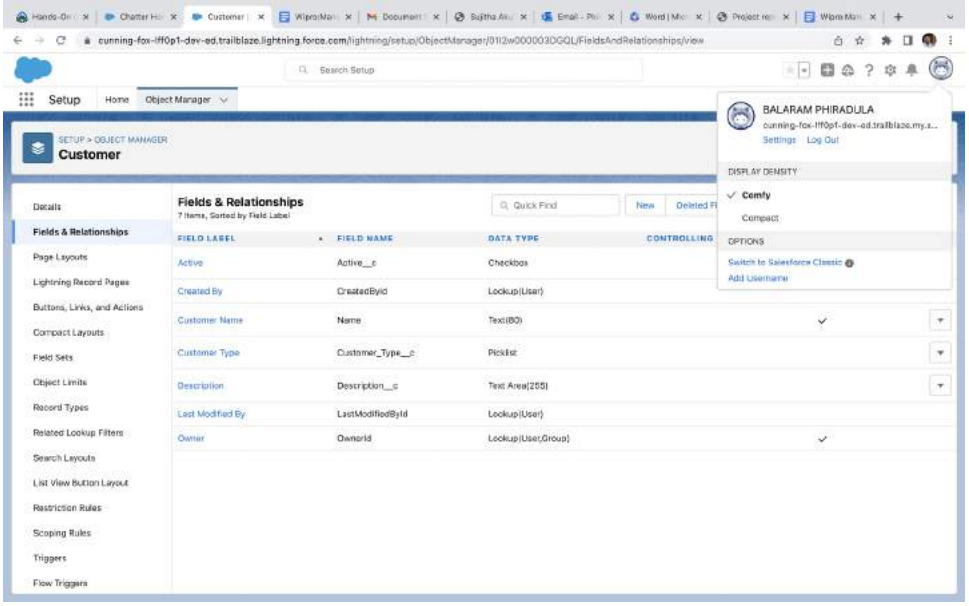


Created the Custom Object Customer as (SCustomer) as there is already a Standard Object named Customer

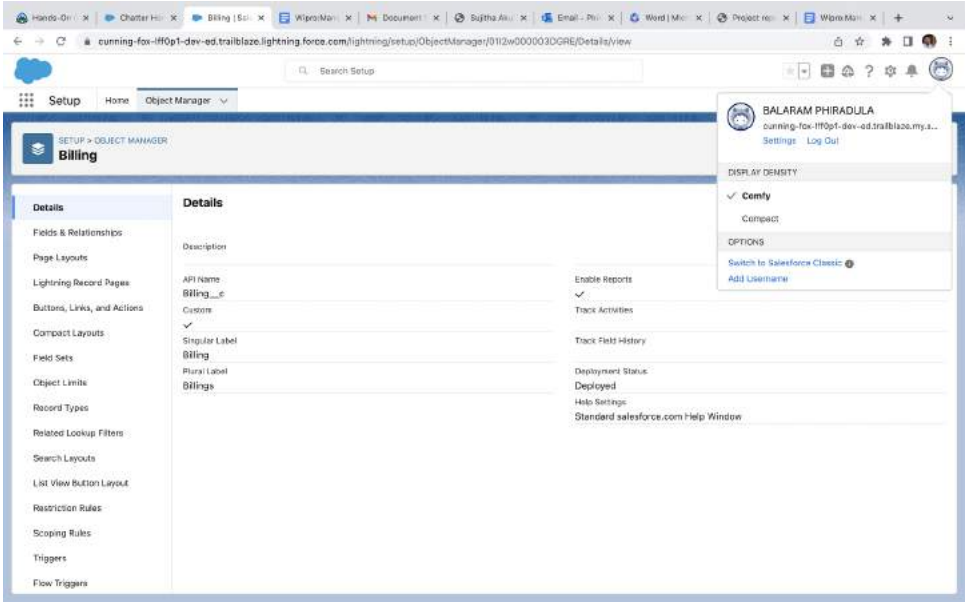


Internal to Wipro

Created all the Custom Fields

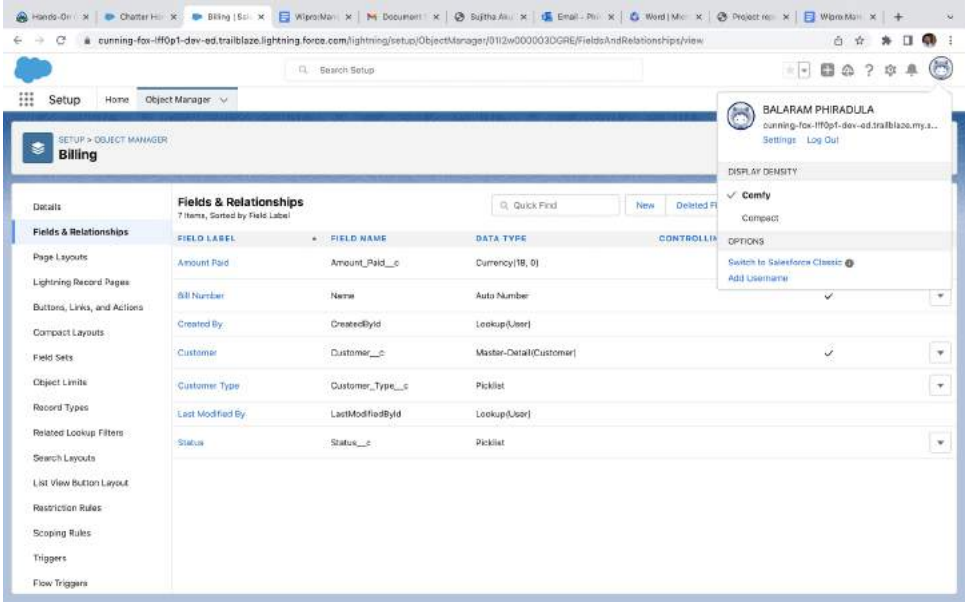


Created a Custom Object named Billing

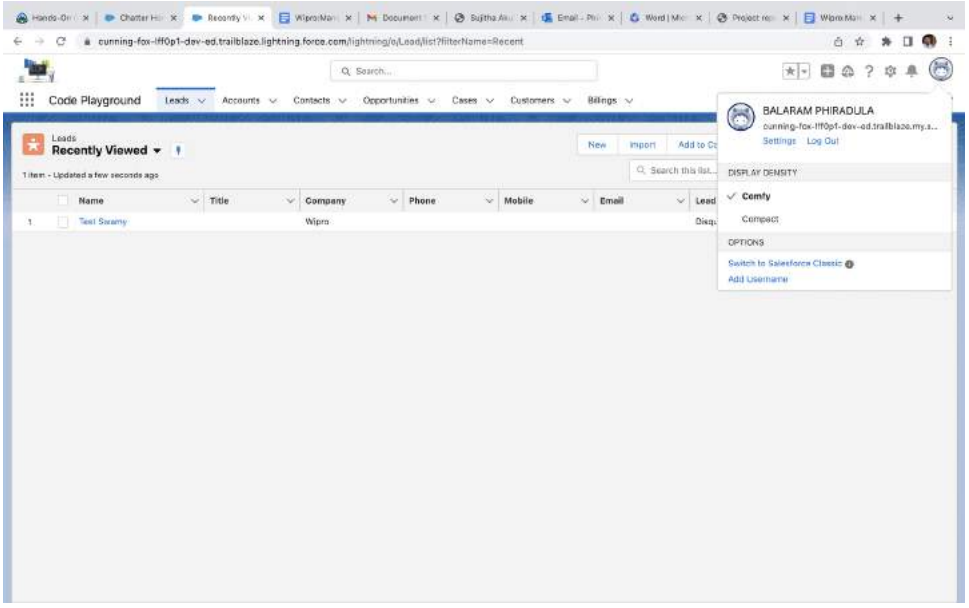


Internal to Wipro

Created Custom fields for billing object



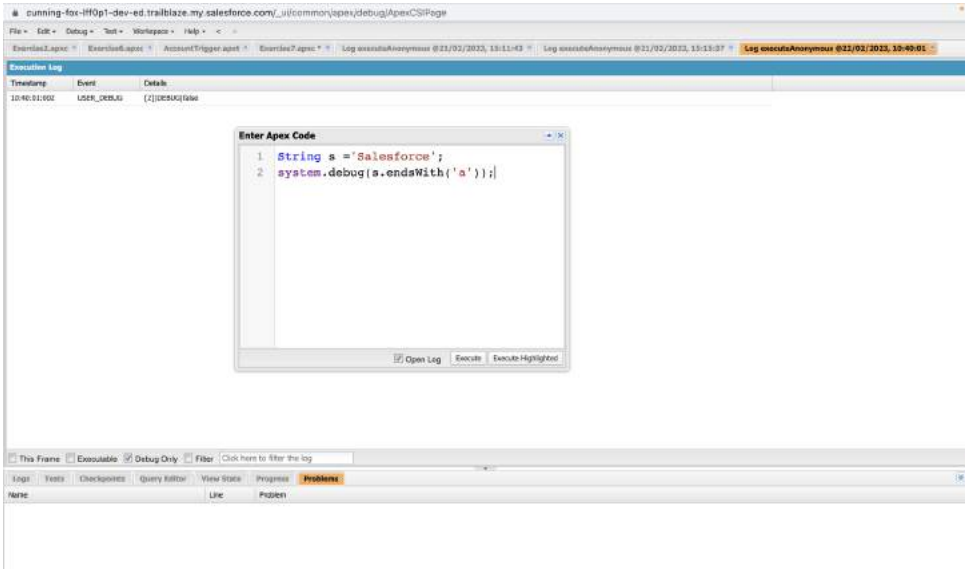
Code Playground App



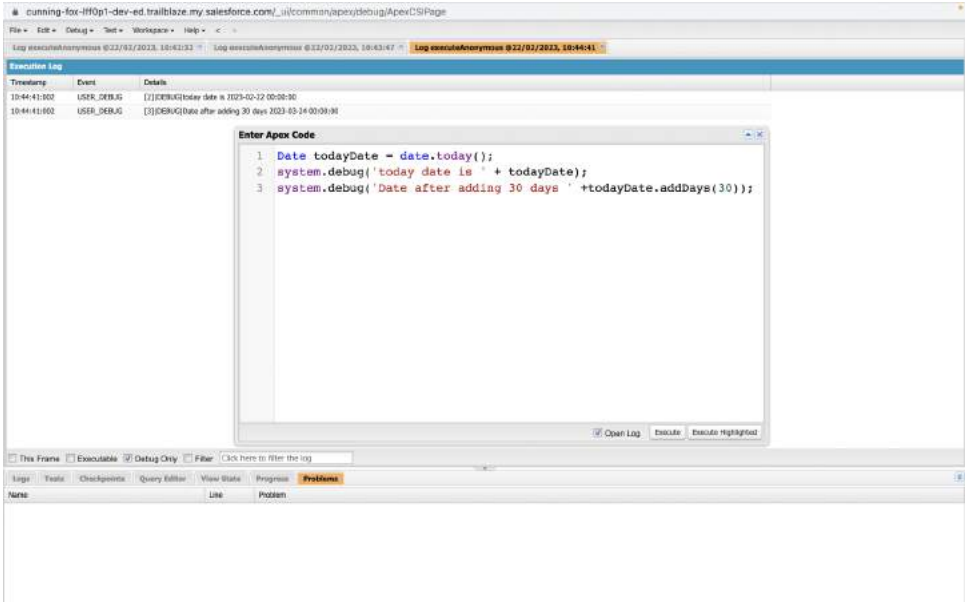
Internal to Wipro

Exercise – 2

String Variable using endsWith() method

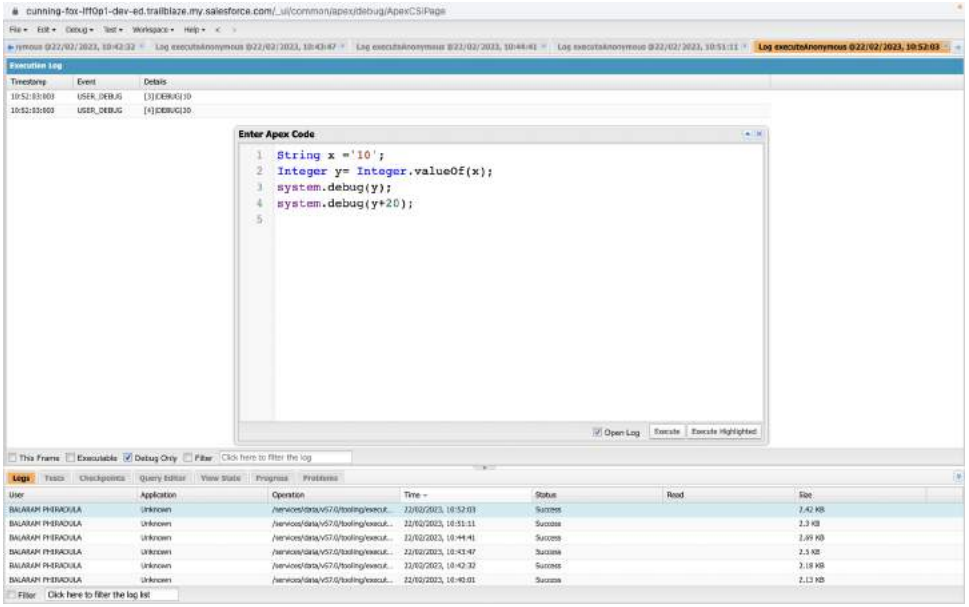


Use the Date method and display the Date

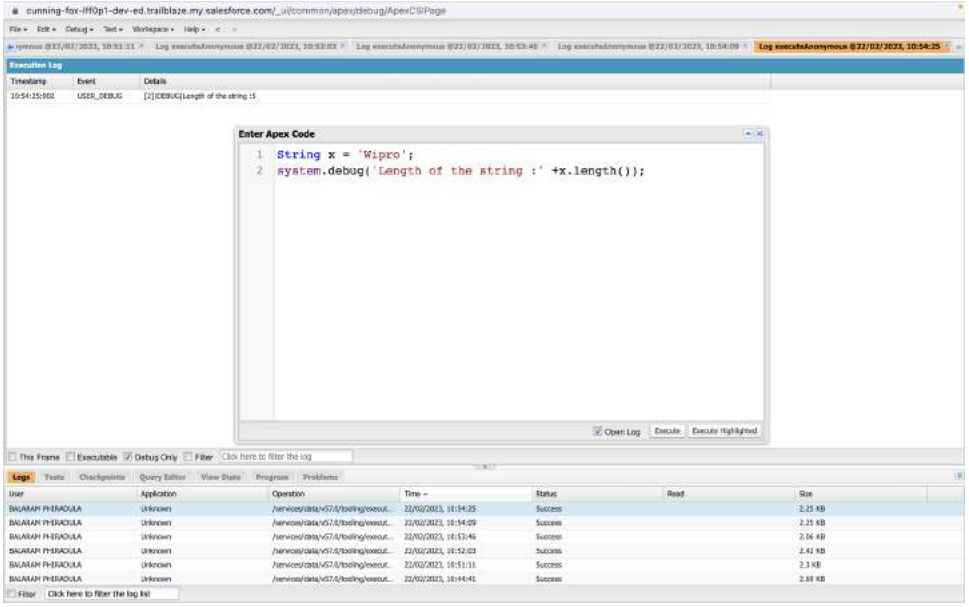


Internal to Wipro

Converted the string to integer and added 20 to it

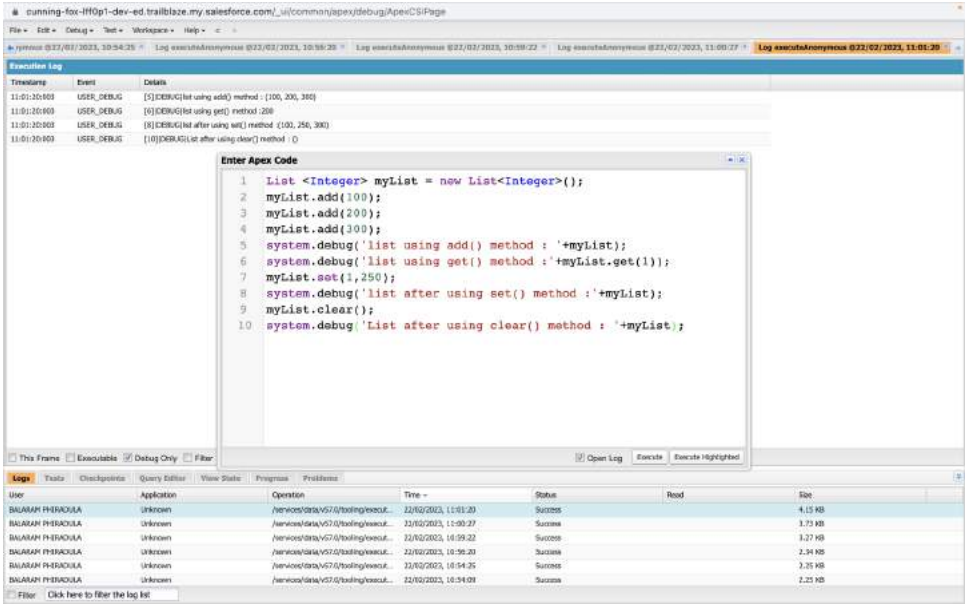


Used Length method to display String length

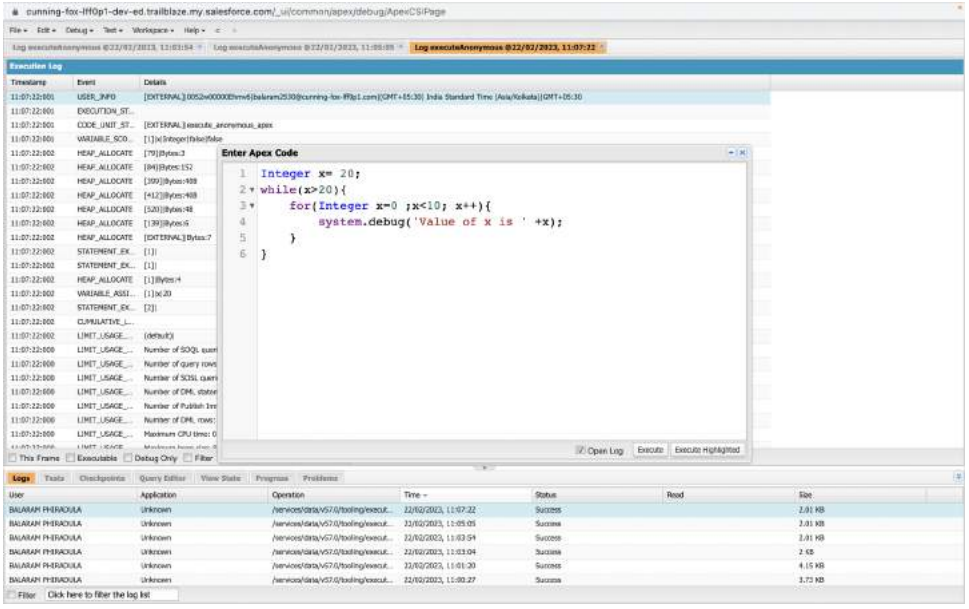


Internal to Wipro

Defined a list and displayed the outputs using different methods

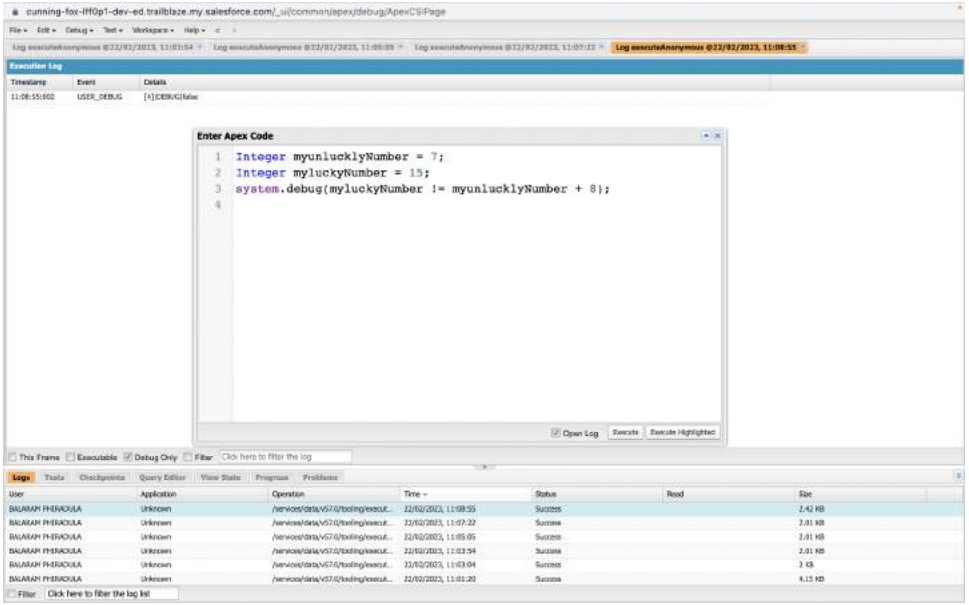


Printed numbers between 0 to 9

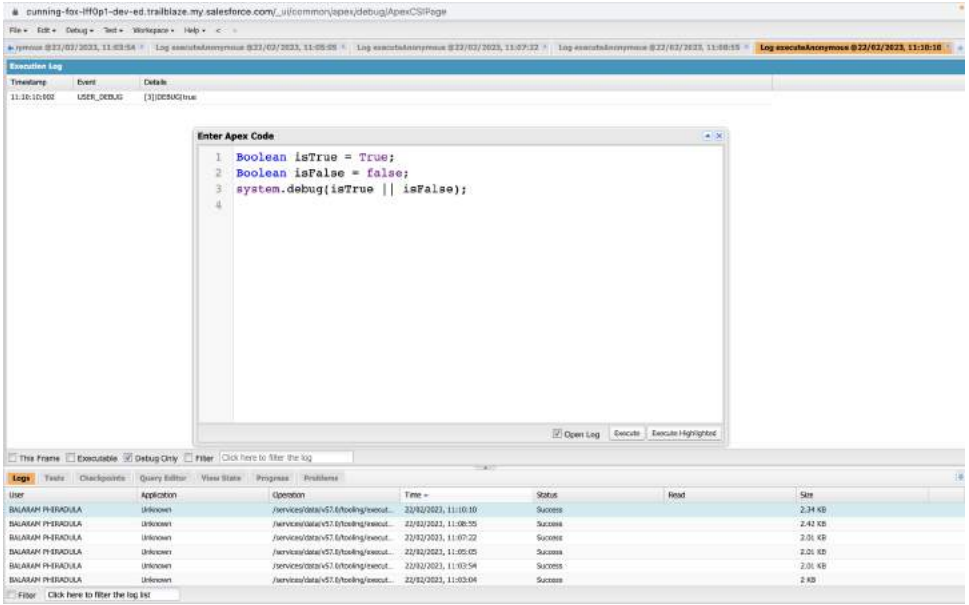


Internal to Wipro

Exercise – 3

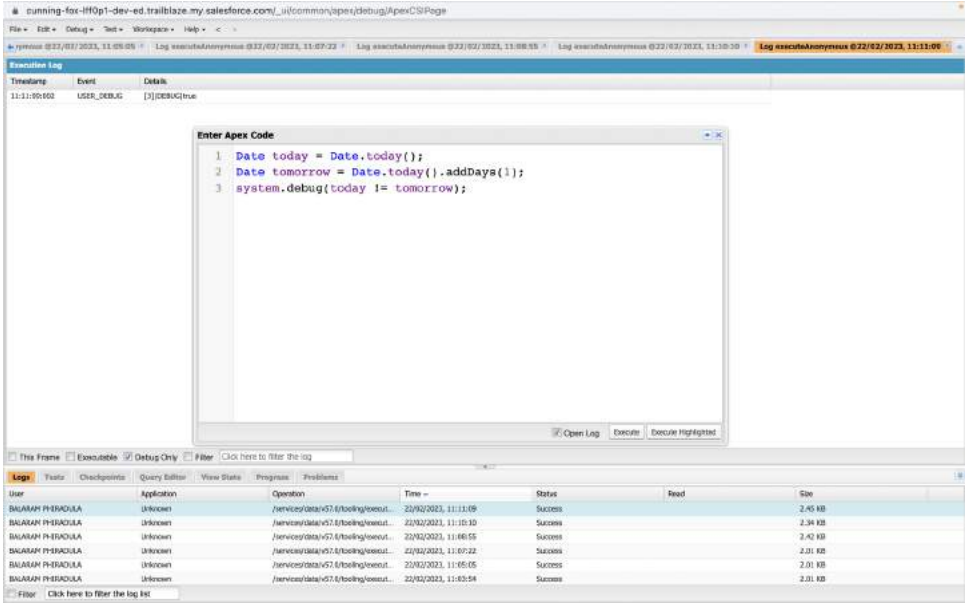


Exercise – 4

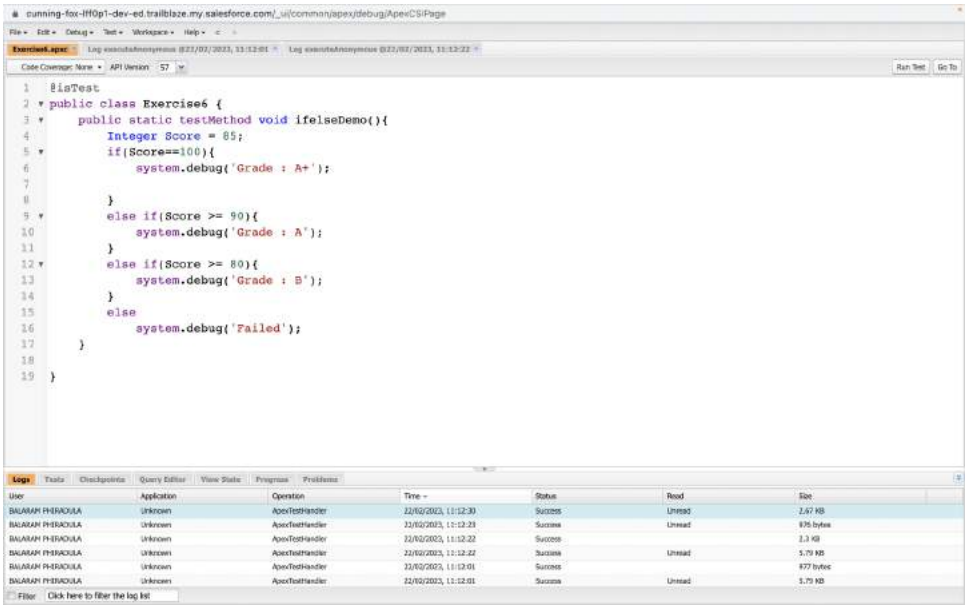


Internal to Wipro

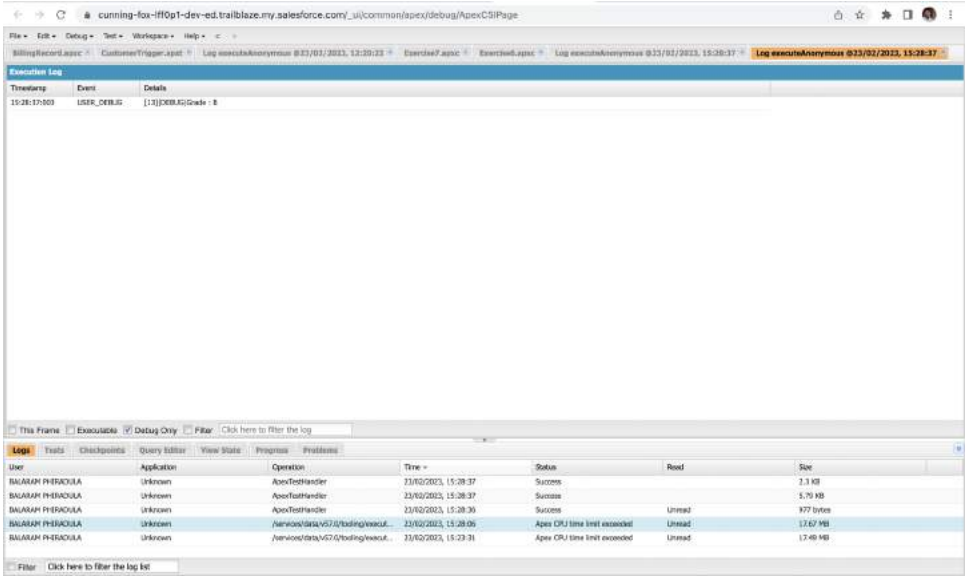
Exercise – 5



Exercise – 6 Program for Finding the Grade based on Score



Internal to Wipro

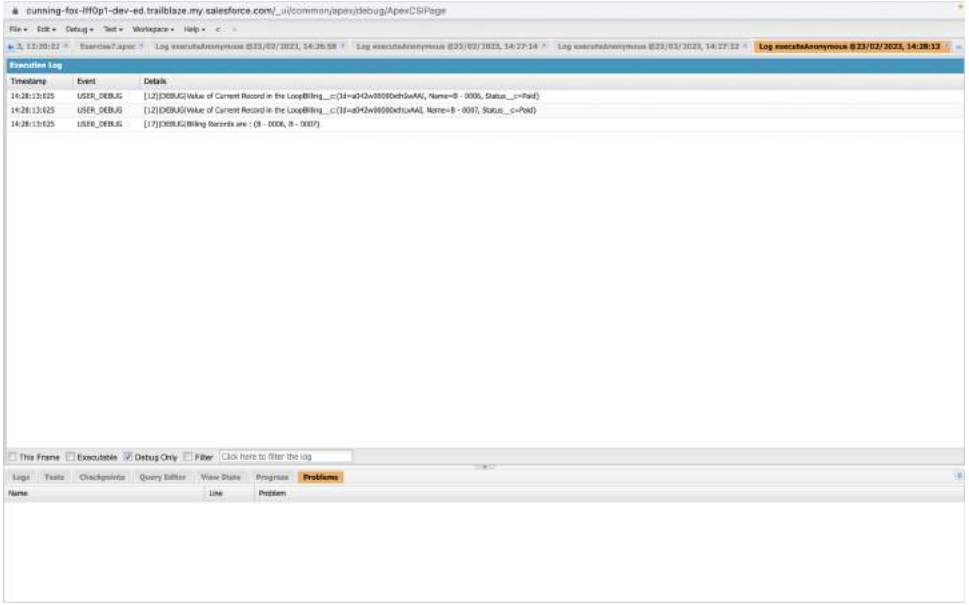


Exercise – 7

Program to execute Apex – for loop

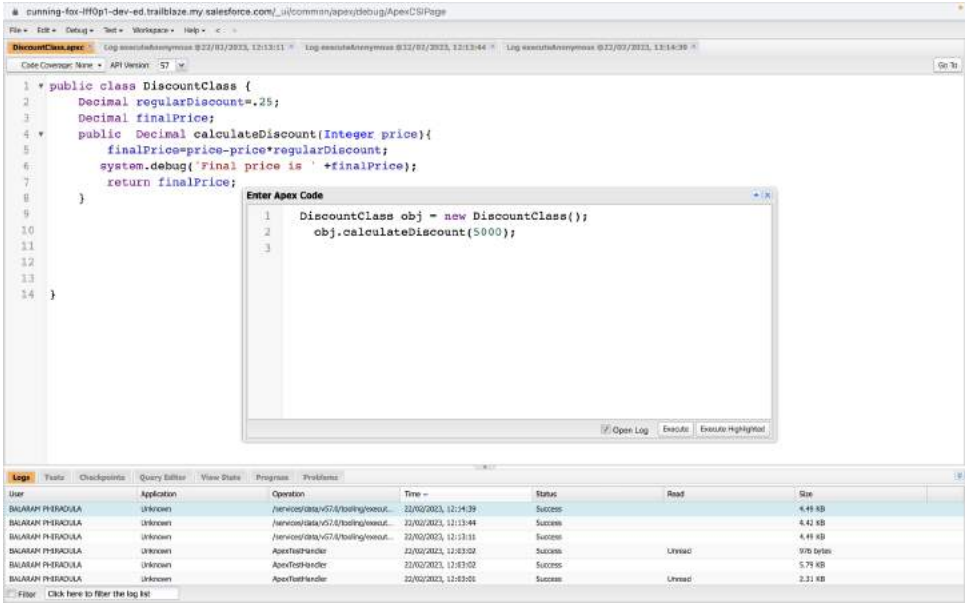
```
public class Exercise7 {

    public static void BillingRecords(){

       list <Billing__c> BillingList =[select Id,Name,Status__c from Billing__c where CreatedDate=today];
       // system.debug(BillingList);
        list <String> billList = new List <String>();
        for(Billing__c bill:BillingList){
            if(bill.Status__c=='Paid')
            {

             system.debug('Value of Current Record in the Loop' +bill);
                billList.add(bill.Name);
            }

       }
        system.debug('Billing Records are : ' +billList);
    }
}
```

Internal to Wipro



Exercise – 8

Created a Class to demonstrate constants in Apex



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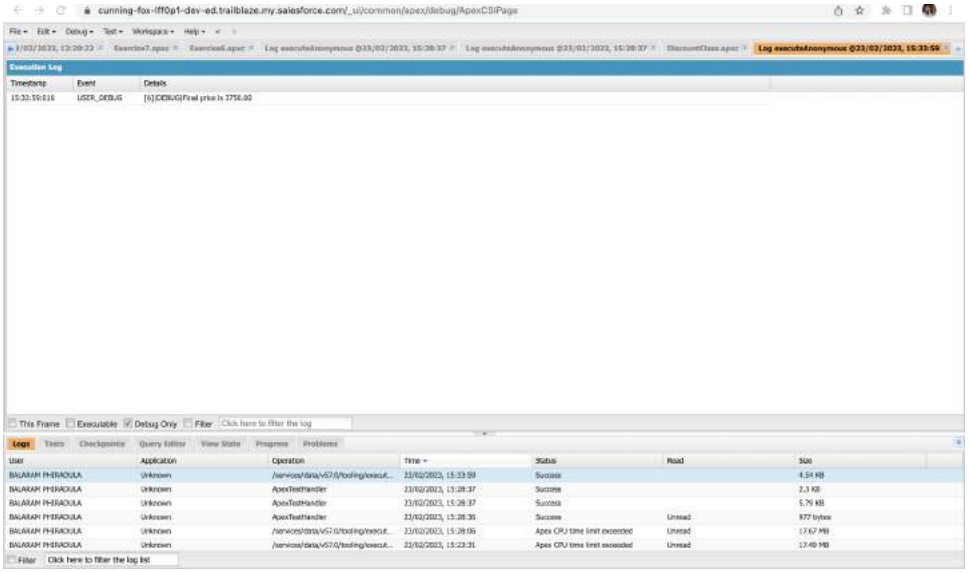
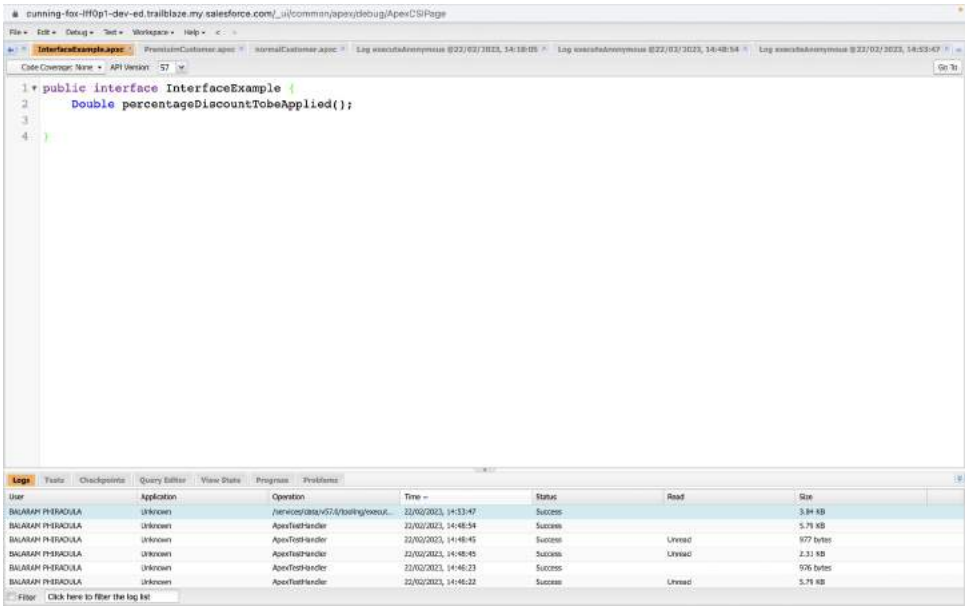
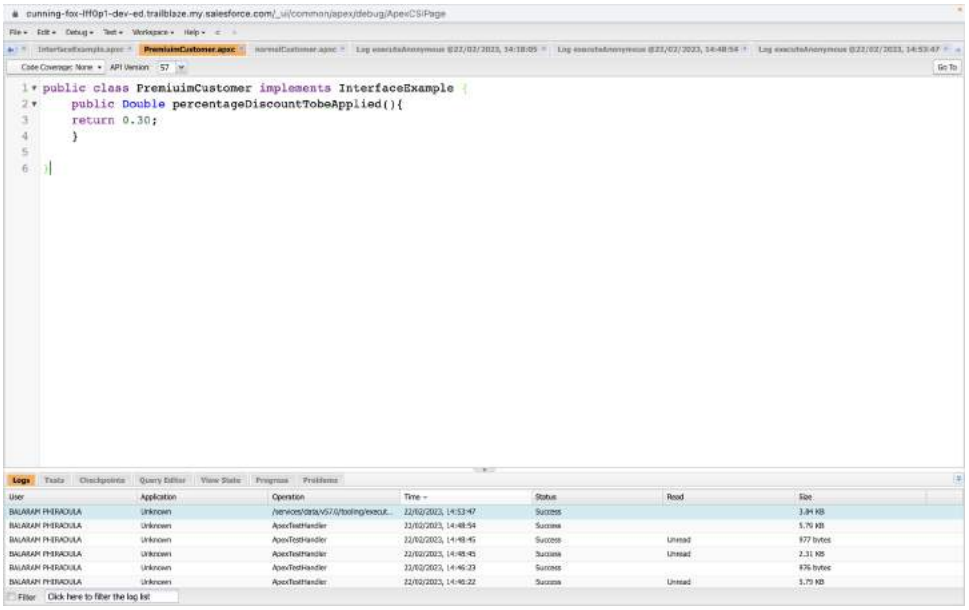
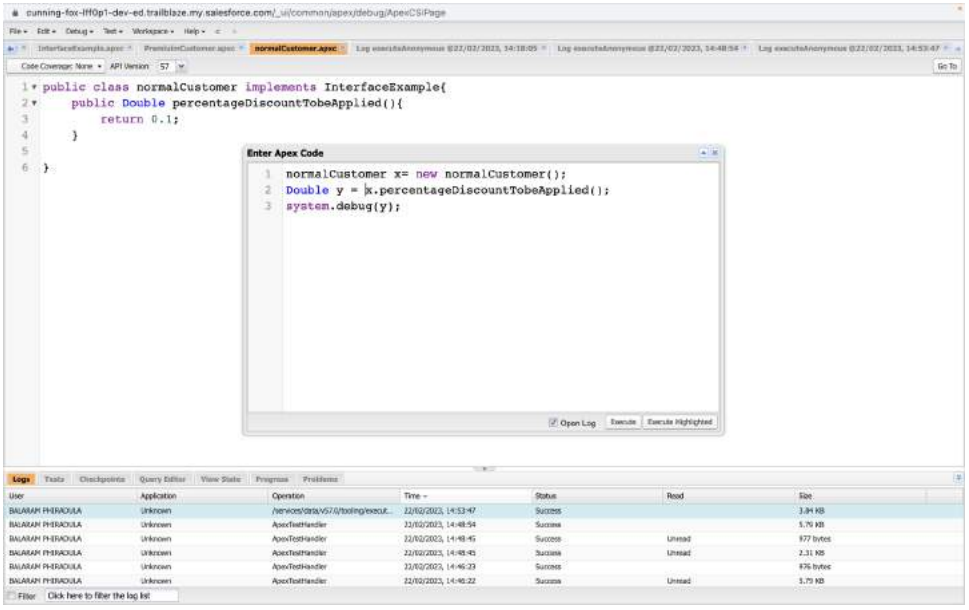


Exercise – 9

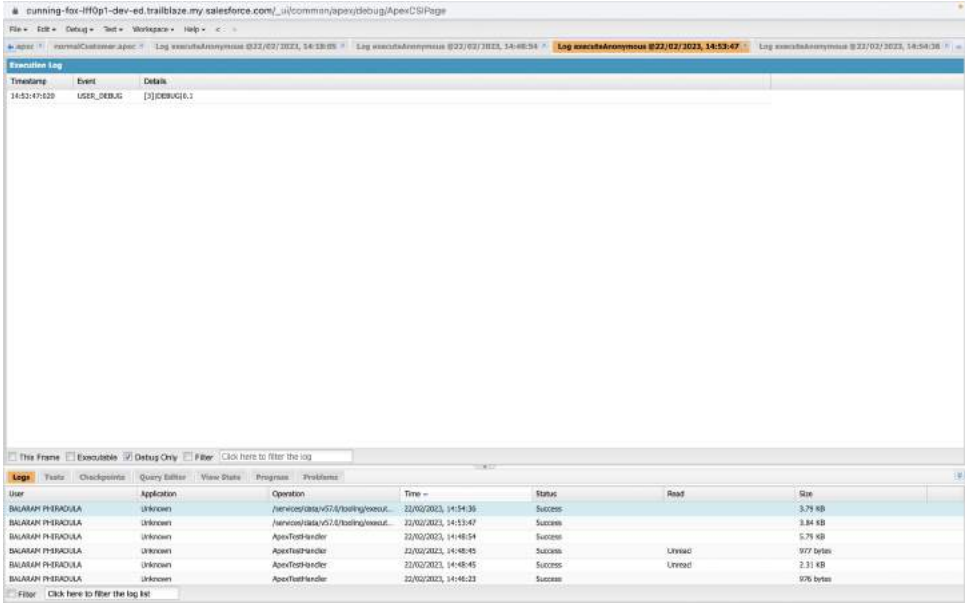


Internal to Wipro



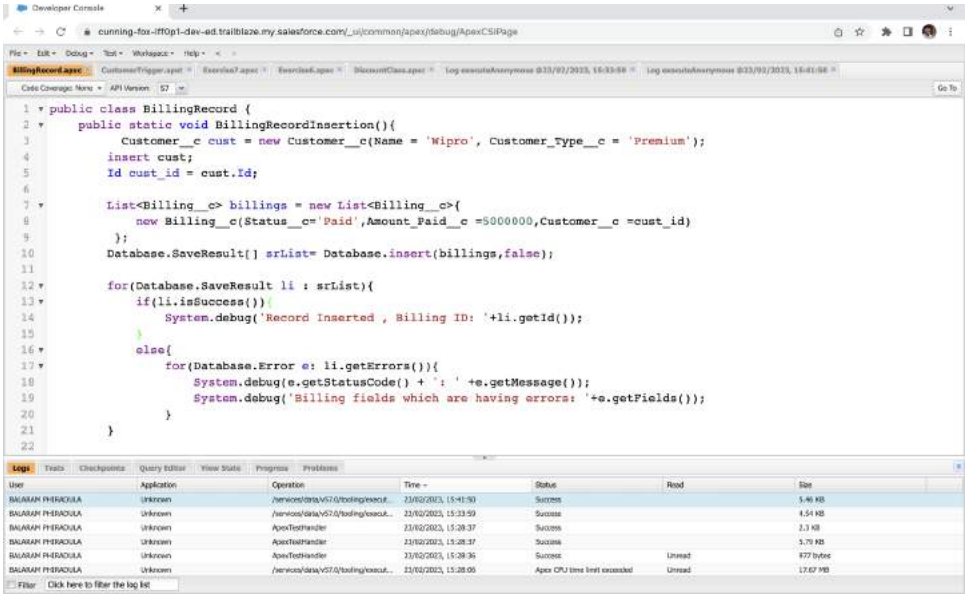


Internal to Wipro



Exercise – 10

Demo on DML Insert Operation Using Database Methods



```
public class BillingRecord {
    public static void BillingRecordInsertion(){
          Customer__c cust = new Customer__c(Name = 'Wipro', Customer_Type__c = 'Premium');
        insert cust;
        Id cust_id = cust.Id;

        List<Billing__c> billings = new List<Billing__c>{
            new Billing__c(Status__c='Paid',Amount_Paid__c =5000000,Customer__c =cust_id)
         };
        Database.SaveResult[] srList= Database.insert(billings,false);

        for(Database.SaveResult li : srList){
            if(li.isSuccess()){
                System.debug('Record Inserted , Billing ID: '+li.getId());
            }
            else{
                for(Database.Error e: li.getErrors()){
                    System.debug(e.getStatusCode() + ': ' +e.getMessage());
                    System.debug('Billing fields which are having errors: '+e.getFields());
                }
        }

```

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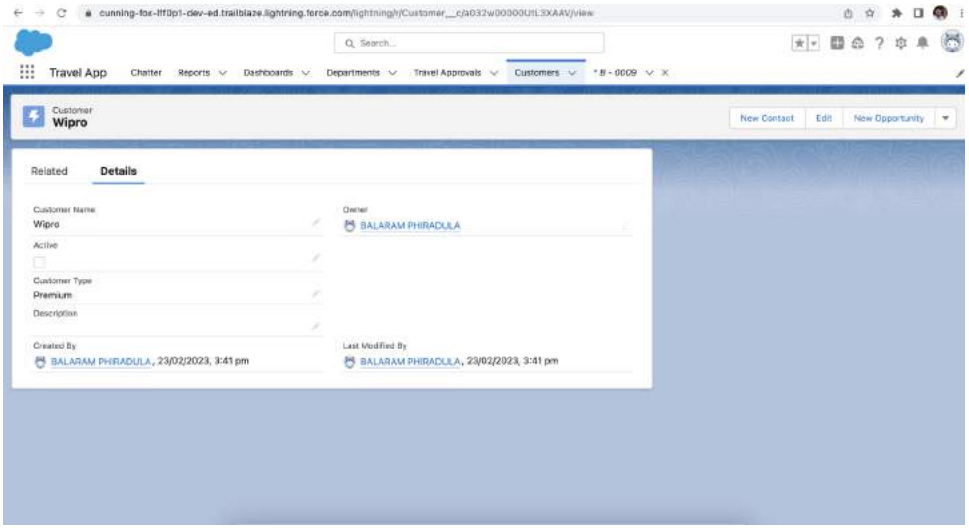

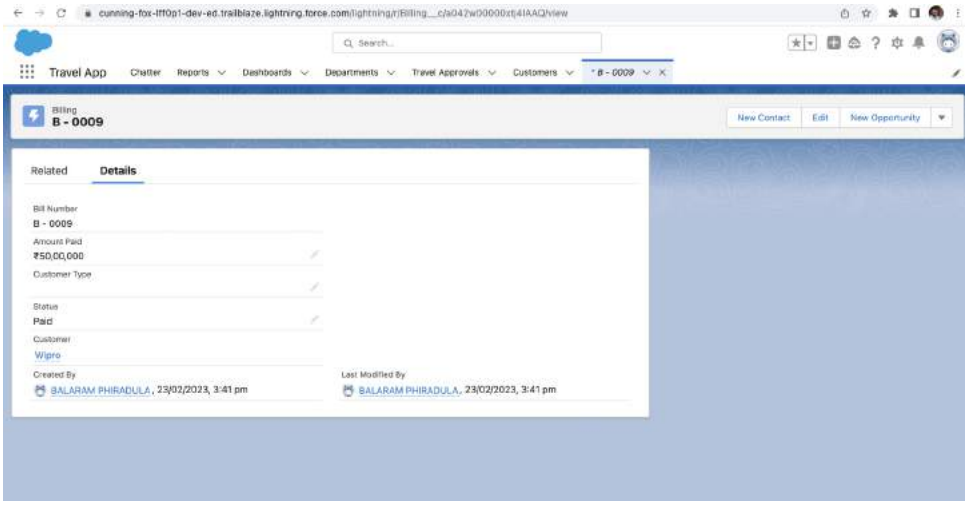

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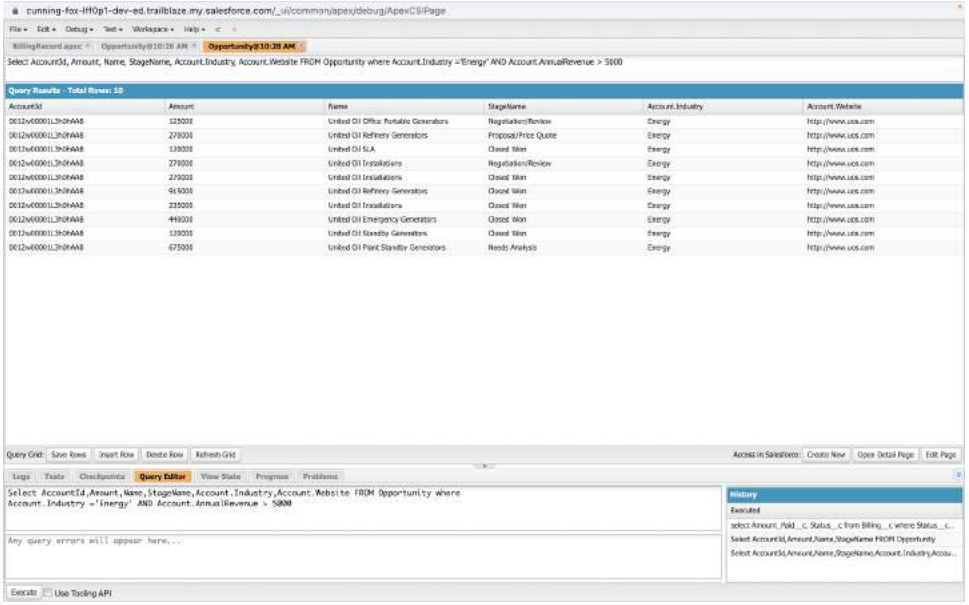
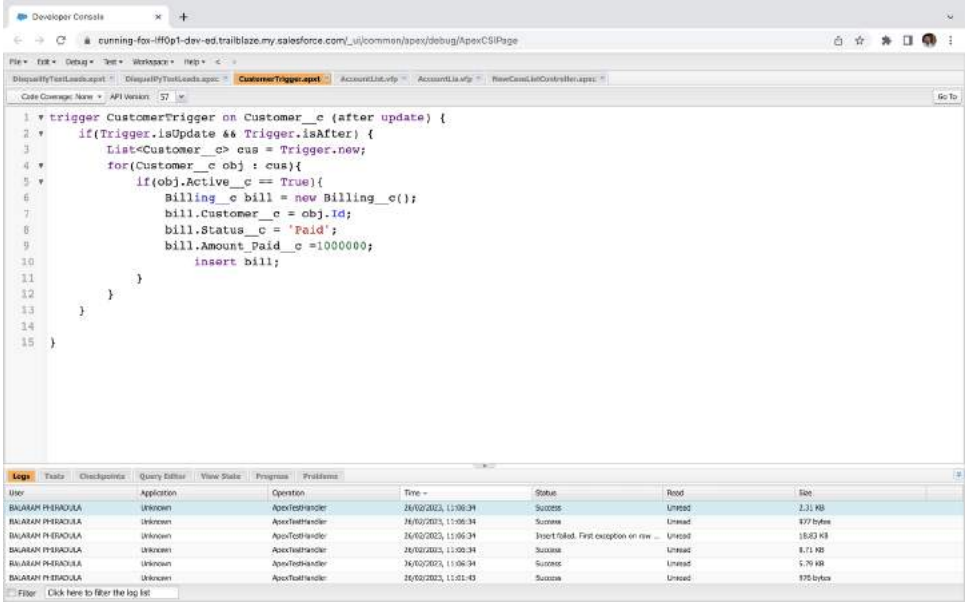
Exercise – 11

Displaying Records According to the required conditions



Exercise – 12

Created a Trigger for Billing Named CustomerTrigger



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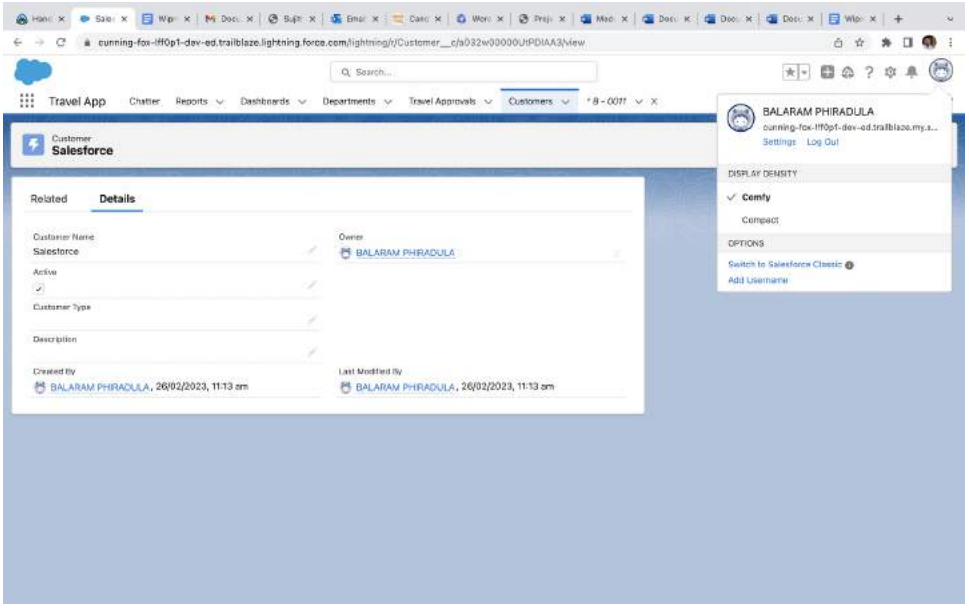
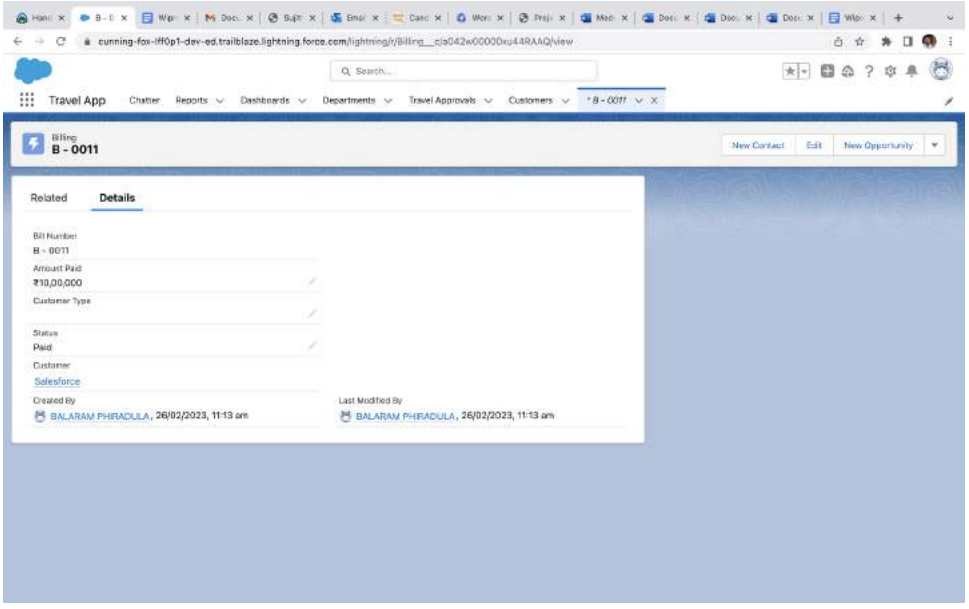
Updated Salesforce Customer from in active to active



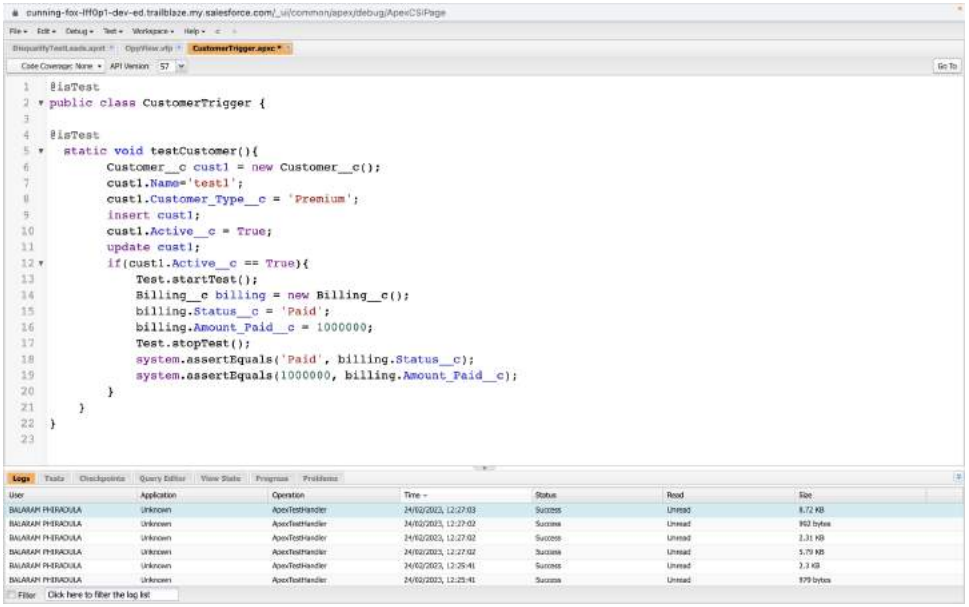
New Record Created in Billing Object with Salesforce as Customer



Internal to Wipro

Exercise – 13

Created a Test class for CustomTrigger

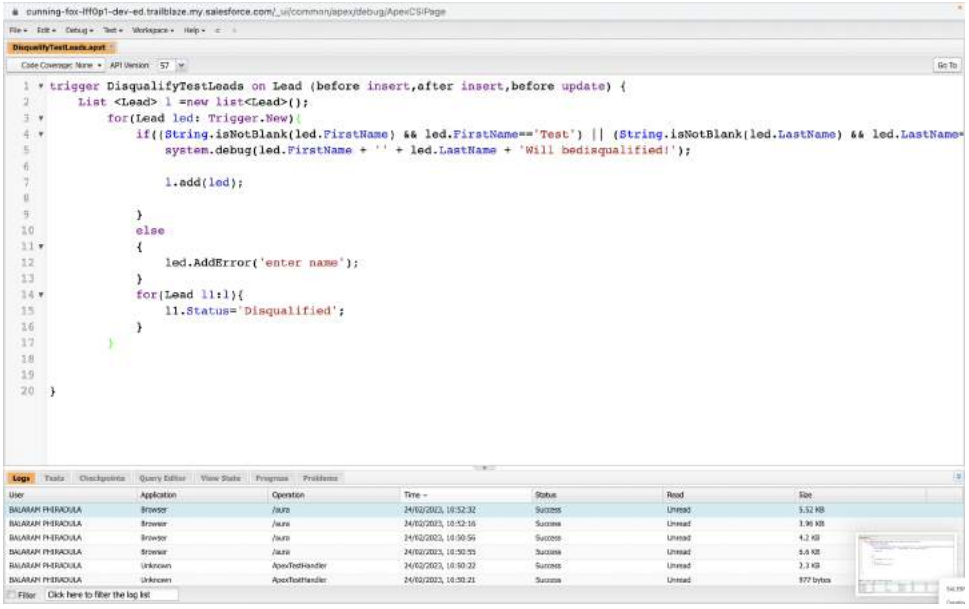


```
@isTest
public class CustomerTrigger {

@isTest
  static void testCustomer(){
        Customer__c cust1 = new Customer__c();
        cust1.Name='test1';
        cust1.Customer_Type__c = 'Premium';
        insert cust1;
        cust1.Active__c = True;
        update cust1;
        if(cust1.Active__c == True){
            Test.startTest();
            Billing__c billing = new Billing__c();
            billing.Status__c = 'Paid';
            billing.Amount_Paid__c = 1000000;
            Test.stopTest();
            system.assertEquals('Paid', billing.Status__c);
            system.assertEquals(1000000, billing.Amount_Paid__c);
        }
    }
}
```

Exercise – 14

Created a Trigger for Leads Named DisqualifyTestLeads



```
trigger DisqualifyTestLeads on Lead (before insert,after insert,before update) {
    List <Lead> l =new list<Lead>();
        for(Lead led: Trigger.New){
            if((String.isNotBlank(led.FirstName) && led.FirstName=='Test') || (String.isNotBlank(led.LastName) && led.LastName=
                system.debug(led.FirstName + '' + led.LastName + 'Will bedisqualified!');

                l.add(led);

            }
            else
            {
                led.AddError('enter name');
            }
            for(Lead ll:l){
                ll.Status='Disqualified';
            }
        }

}
```

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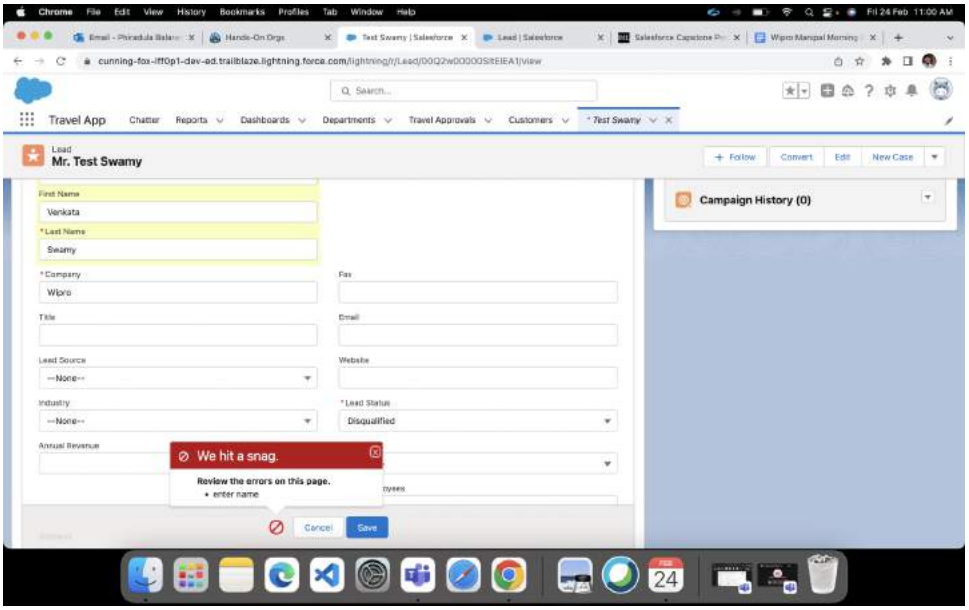
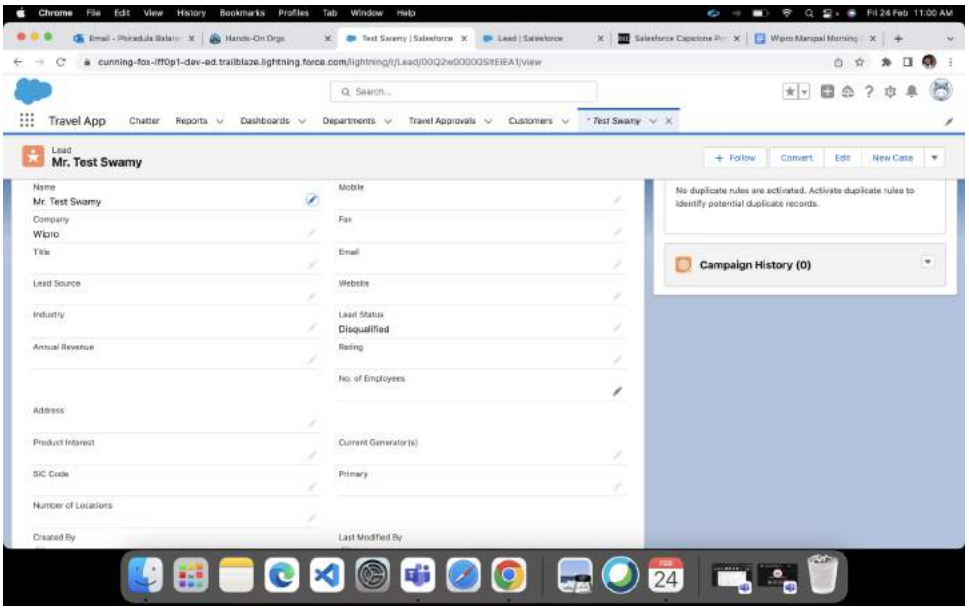
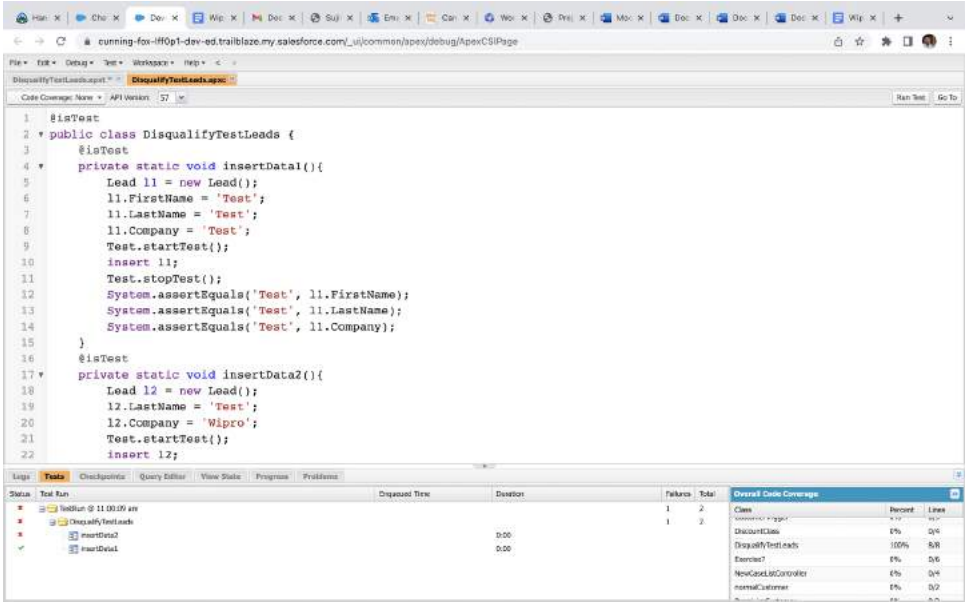




Internal to Wipro

Exercise – 15

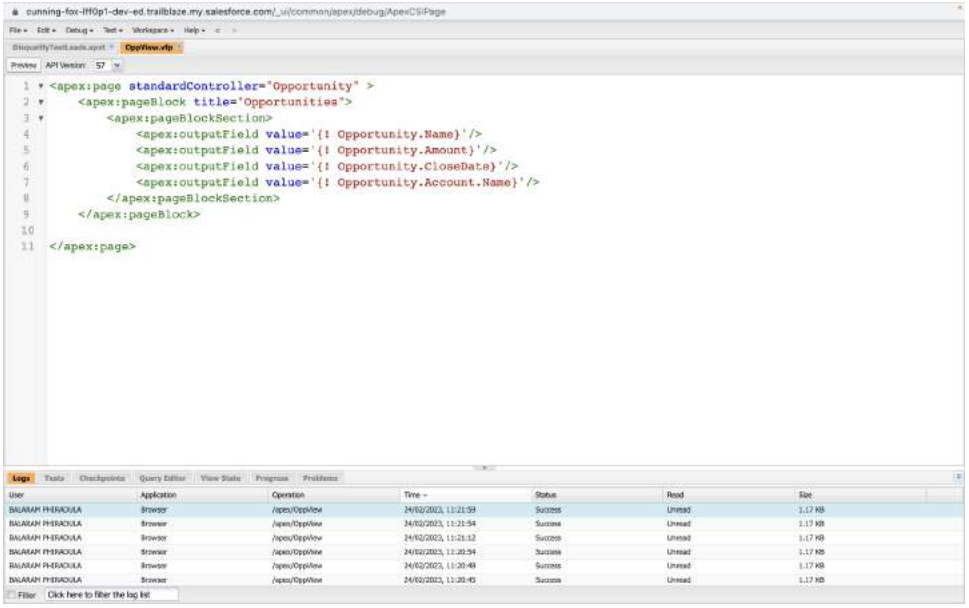
Created a test class for DisqualifyTestLeads trigger



```
@isTest
public class DisqualifyTestLeads {
    @isTest
    private static void insertData1(){
        Lead l1 = new Lead();
        l1.FirstName = 'Test';
        l1.LastName = 'Test';
        l1.Company = 'Test';
        Test.startTest();
        insert l1;
        Test.stopTest();
        System.assertEquals('Test', l1.FirstName);
        System.assertEquals('Test', l1.LastName);
        System.assertEquals('Test', l1.Company);
    }
    @isTest
    private static void insertData2(){
        Lead l2 = new Lead();
        l2.LastName = 'Test';
        l2.Company = 'Wipro';
        Test.startTest();
        insert l2;
```

Exercise – 16

Created a Visualforce Page OppView and displayed four apex: outputfields



```
<apex:page standardController="Opportunity" >
    <apex:pageBlock title='Opportunities">
        <apex:pageBlockSection>
            <apex:outputField value='{! Opportunity.Name}'/>
            <apex:outputField value='{! Opportunity.Amount}'/>
            <apex:outputField value='{! Opportunity.CloseDate}'/>
            <apex:outputField value='{! Opportunity.Account.Name}'/>
        </apex:pageBlockSection>
    </apex:pageBlock>

</apex:page>
```

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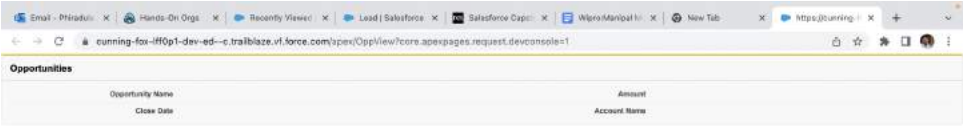
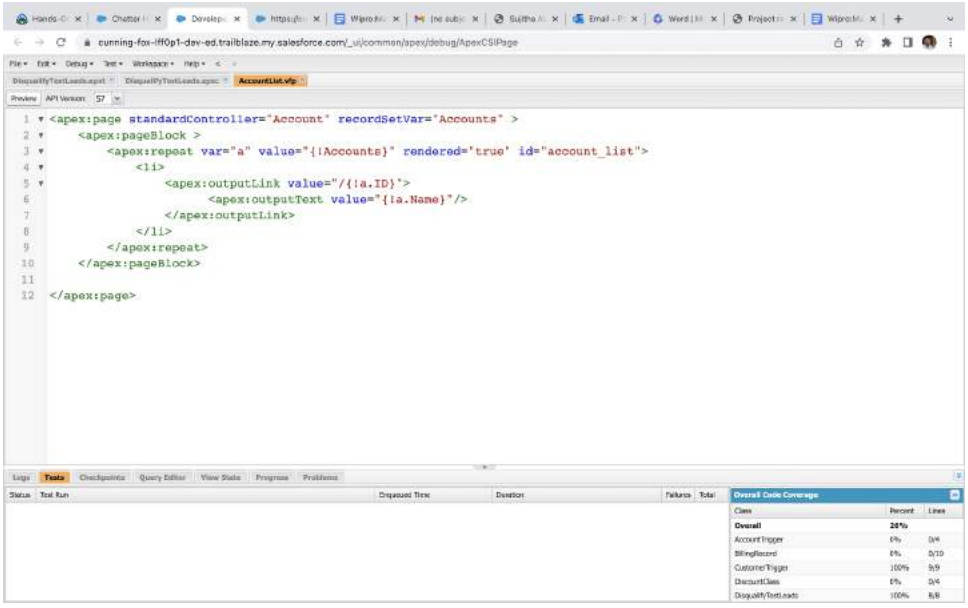
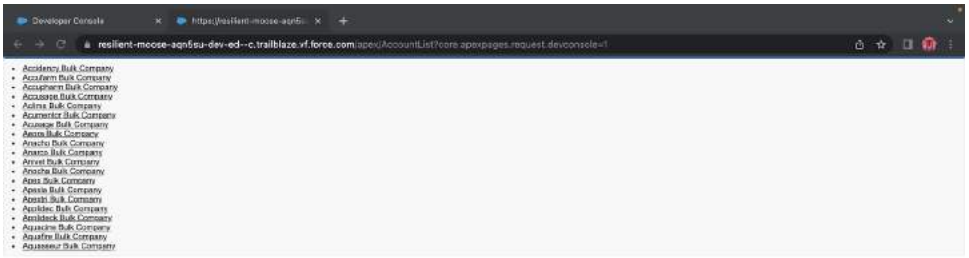


Exercise – 17

Created a Visualforce page that shows a list of Accounts linked to their record pages

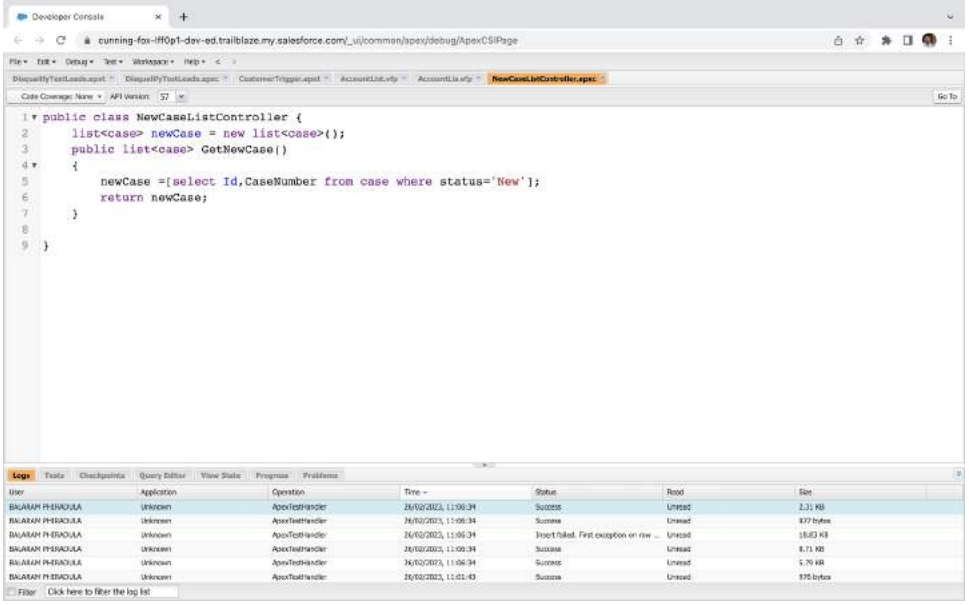


Internal to Wipro



Exercise – 18

Created a Vf page that uses an Apex class to display a list of cases with the status of 'New'.



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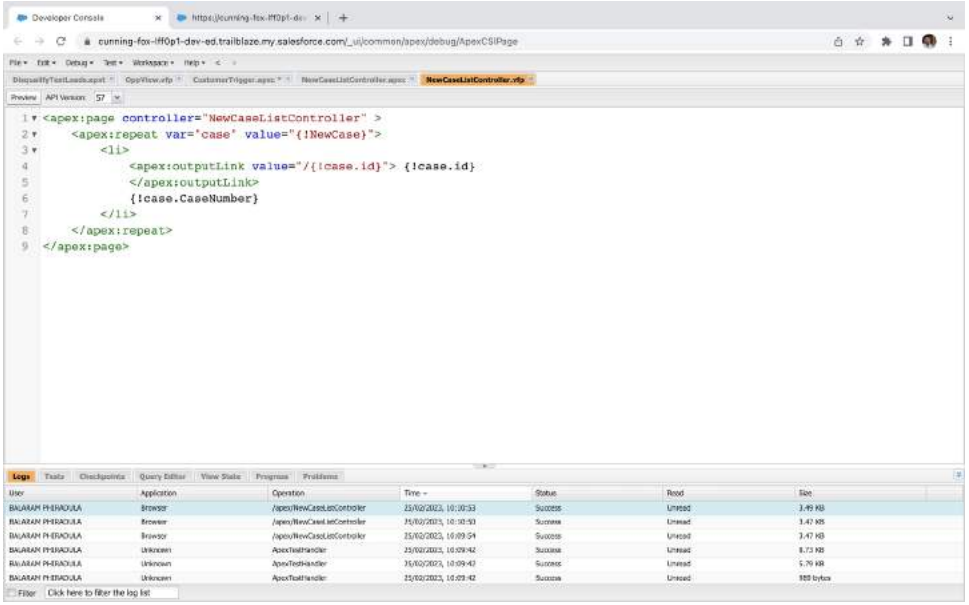

- 5002w00000fh0qNAAQ 00001002
- 5002w00000fh0qbAAA 00001016
- 5002w00000fh0qjAAA 00001024

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References

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2. Salesforce - ADX201 Administrative Essentials for New Admins in Lightning Experience (SFADX201) (qa.com)

3. Understand the Salesforce Architecture Unit | Salesforce Trailhead

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