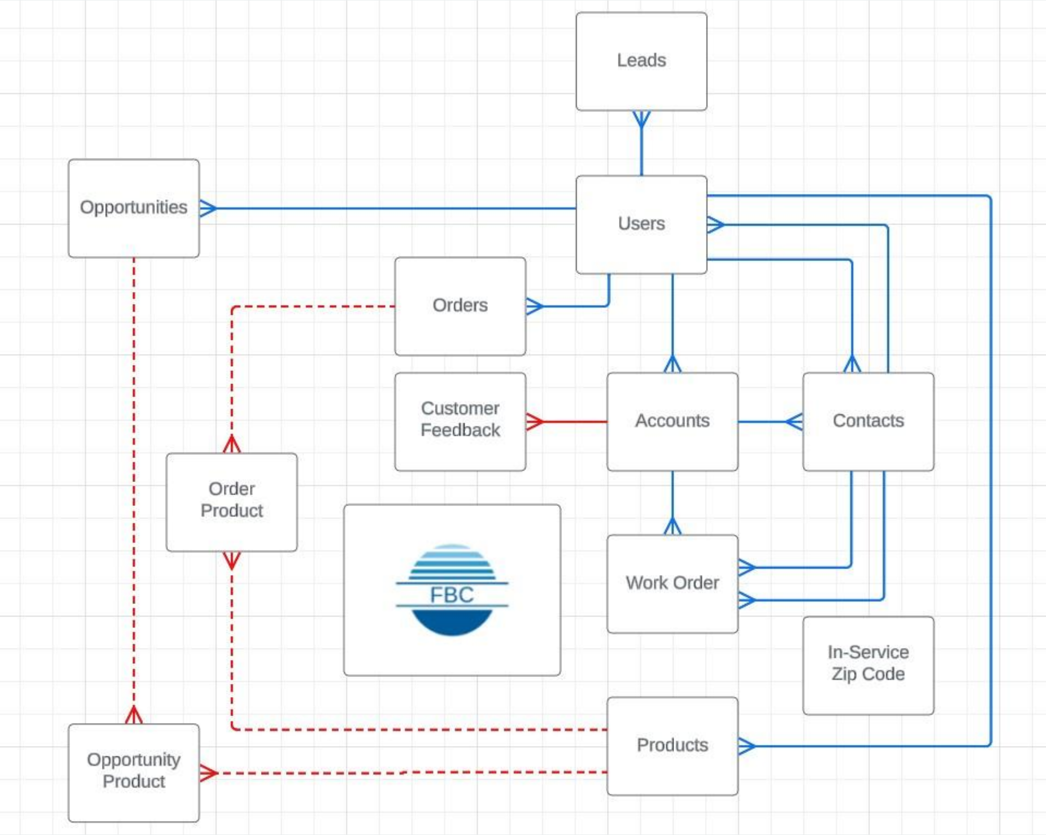
# Byte Bandits Project 2 Presentation - FBC Office Supply Company

# ERD


Leads
Opportunities
Users
Orders
Customer Feedback
Accounts
Contacts
Order Product
FBC
Work Order
In-Service Zip Code
Products
Opportunity Product

# Jason

User story: FBC administrator

Use cases:

- #11 validation rule on contacts (show you cant add non US numbers)
- #28 Apex trigger on Users (show when user with technician profile is made a contact is made)
- #36 Visualforce tab (show tab on app menu)

# Anthony Schultz User Epic / User Cases

# Use Cases / User Epic

## User Story For Jerry, a Sales User

- **Create Products for Each Product Type (Meet Row 16):** As a sales user, create 2 products for the "Office Supplies" category. Create 2 products for the "Office Infrastructure" category.
- **Create an Opportunity Expiring in 7 Days (Meet Row 27):** Go to the "Opportunities" tab. Create a new Opportunity with a close date set to 7 days from today. Verify that a task is created for this Opportunity to remind the owner to close it.
- **Use Visualforce Pages for Opportunities (Meet Row 34):** Navigate to the Visualforce page designed for managing Opportunities. Use the page to create a new Opportunity. View existing Opportunities on the page. Delete an Opportunity using the options provided on the page.
- **Review Navigation Bar and Logo Integration (Meet Row 38):** Go over the navigation bar implementation. Discuss how the navigation bar was styled using CSS. Point out the addition of relevant icons from Google APIs. Highlight the integration of the FBC logo as a static resource across all Visualforce pages for consistent branding.

# Use Case Row 16

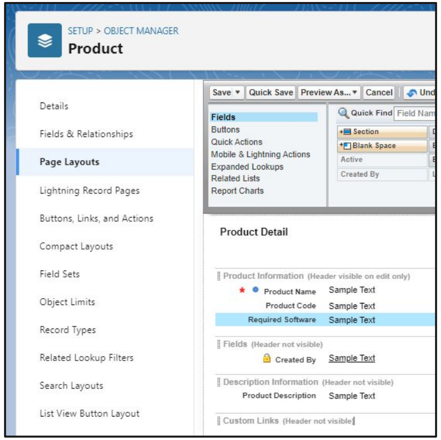
**Use Case:** We should differentiate between our two product categories - office supplies and office infrastructure. For example, a server or desktop product may require specific software and we should include that information on a record. A #2 pencil has no required software.

**Comments:**

**Record Types:** Created two record types: Office Supplies and Office Infrastructure. Assigned appropriate page layouts to these record types to ensure correct display and usage.

**Page Layouts:** Office Infrastructure Layout: Included a multi-picklist field to enable users to select multiple software options necessary for the product. Office Supplies Layout: Excluded the multi-picklist field, as these products do not require software.

**Validation Rule:** Added a validation rule to enforce that the Office Supply record type cannot be assigned any software. This rule prevents the assignment of software to office supplies even if attempted through Apex code.



Product Detail

Product Information (Header visible on edit only)

| | |
|---|---|
| Product Name | Sample Text |
| Product Code | Sample Text |
| Required Software | Sample Text |

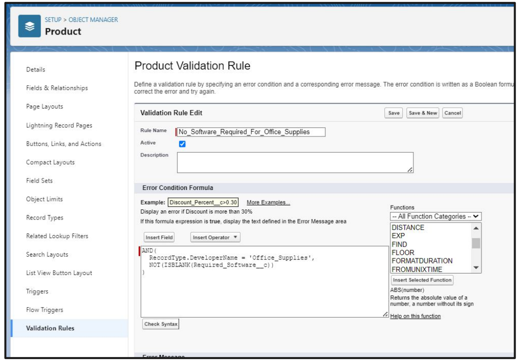
Fields (Header not visible)

| | |
|---|---|
| Created By | Sample Text |

Description Information (Header not visible)

| | |
|---|---|
| Product Description | Sample Text |

Custom Links (Header not visible)



Product Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formu correct the error and try again.

Validation Rule Edit

Rule Name: No_Software_Required_For_Office_Supplies

Active: ☑

Description:

Error Condition Formula

Example: Discount_Percent__c>0.30 More Examples...

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

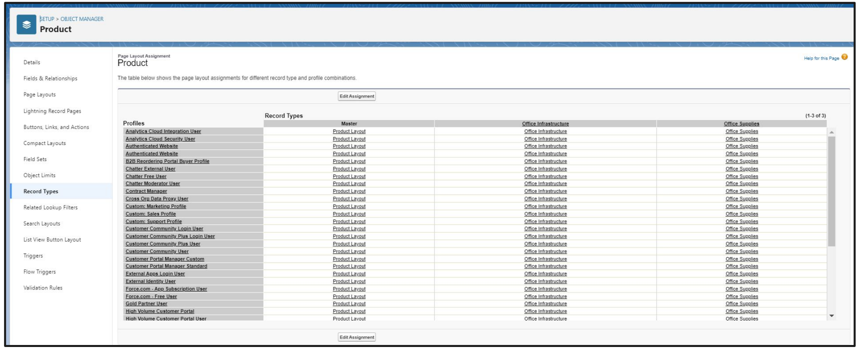
```
AND(
  RecordType.DeveloperName = 'Office_Supplies',
  NOT(ISBLANK(Required_Software__c))
)
```

ABS(number)

Returns the absolute value of a number, a number without its sign

Help on this function

Error Message



Page Layout Assignment

Product

The table below shows the page layout assignments for different record type and profile combinations.

Record Types (1-3 of 3)

| Profiles | Master | Office Infrastructure | Office Supplies |
|---|---|---|---|
| Analytics Cloud Integration User | Product Layout | Office Infrastructure | Office Supplies |
| Analytics Cloud Security User | Product Layout | Office Infrastructure | Office Supplies |
| Authenticated Website | Product Layout | Office Infrastructure | Office Supplies |
| Authenticated Website | Product Layout | Office Infrastructure | Office Supplies |
| B2B Reordering Portal Buyer Profile | Product Layout | Office Infrastructure | Office Supplies |
| Chatter External User | Product Layout | Office Infrastructure | Office Supplies |
| Chatter Free User | Product Layout | Office Infrastructure | Office Supplies |
| Chatter Moderator User | Product Layout | Office Infrastructure | Office Supplies |
| Contract Manager | Product Layout | Office Infrastructure | Office Supplies |
| Cross Org Data Proxy User | Product Layout | Office Infrastructure | Office Supplies |
| Custom: Marketing Profile | Product Layout | Office Infrastructure | Office Supplies |
| Custom: Sales Profile | Product Layout | Office Infrastructure | Office Supplies |
| Custom: Support Profile | Product Layout | Office Infrastructure | Office Supplies |
| Customer Community Login User | Product Layout | Office Infrastructure | Office Supplies |
| Customer Community Plus Login User | Product Layout | Office Infrastructure | Office Supplies |
| Customer Community Plus User | Product Layout | Office Infrastructure | Office Supplies |
| Customer Community User | Product Layout | Office Infrastructure | Office Supplies |
| Customer Portal Manager Custom | Product Layout | Office Infrastructure | Office Supplies |
| Customer Portal Manager Standard | Product Layout | Office Infrastructure | Office Supplies |
| External Apps Login User | Product Layout | Office Infrastructure | Office Supplies |
| External Identity User | Product Layout | Office Infrastructure | Office Supplies |
| Force.com - App Subscription User | Product Layout | Office Infrastructure | Office Supplies |
| Force.com - Free User | Product Layout | Office Infrastructure | Office Supplies |
| Gold Partner User | Product Layout | Office Infrastructure | Office Supplies |
| High Volume Customer Portal | Product Layout | Office Infrastructure | Office Supplies |
| High Volume Customer Portal User | Product Layout | Office Infrastructure | Office Supplies |

# Use Case Row 27

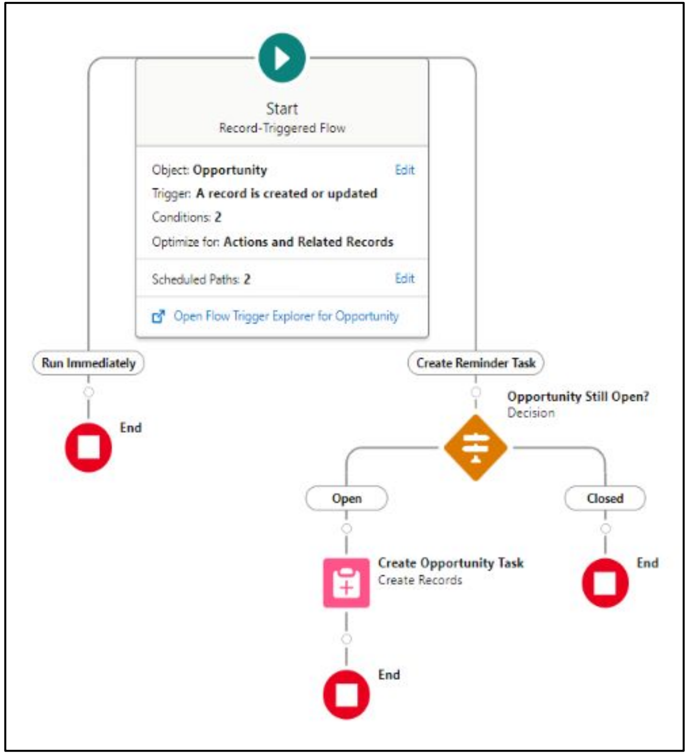
**Use Case:** FBC wants to make sure Opportunities are being closed on time. Ensure that the owner of an Opportunity gets a task to close the Opportunity if it's not closed a week before the close date.

**Comments:**

**Flow Trigger:** The flow is set to trigger when an Opportunity is created or updated. Entry Conditions: StageName is not equal to "Closed Won" and StageName is not equal to "Closed Lost". Scheduled Path: The flow includes a scheduled path set to execute 7 days before the Opportunity's Close Date.

**Decision Node:** At the scheduled time, the flow checks if the Opportunity's StageName is still not "Closed Won" or "Closed Lost". If the Opportunity has been closed (either "Closed Won" or "Closed Lost"), the flow terminates and does not create a task.

**Task Creation:** If the Opportunity is still open, the flow creates a Task record assigned to the Opportunity owner. This Task serves as a reminder to close the Opportunity. Testing: Created multiple test Opportunity records with Close Dates on the 8th and 9th of the month to verify that tasks are generated correctly. Additional tests ensure that tasks are not created if the Opportunity is closed before the 7-day threshold.



Object: Opportunity
Trigger: A record is created or updated
Conditions: 2
Optimize for: Actions and Related Records
Scheduled Paths: 2

# Use Case Row 34

**Use Case**: Create a Visualforce page for viewing/creating/deleting Opportunities. The app should have cohesion, allowing us to navigate to other pages within the app.

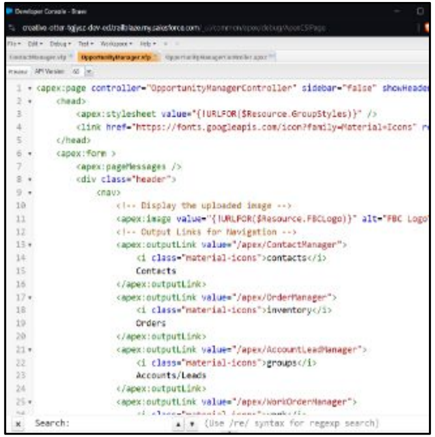
**Comments:**

**Visualforce Page Setup:** Created a Visualforce page named OpportunityManager to handle the viewing, creation, and deletion of Opportunities.

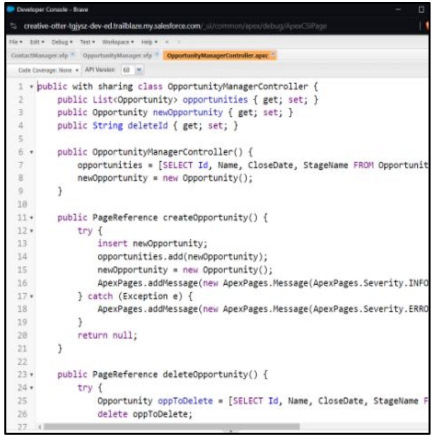
**Controller Logic:** Used OpportunityManagerController to manage the business logic for the page. The controller includes methods for querying existing Opportunities, creating new ones, and deleting records. Form for Creating Opportunities: Added inputField tags within a form to capture user input for new Opportunity records. Created a commandButton labeled "Create Opportunity," which invokes the createOpportunity action in the controller.

**Displaying Opportunities:** Used a pageBlockTable to list existing Opportunities. Data is retrieved using an SOQL query in the OpportunityManagerController. Deletion of Opportunities: Each row in the pageBlockTable includes a commandLink for deleting the Opportunity. The commandLink calls the deletion method in the controller, which handles the removal of the record from both the view and the database.

**Navigation Bar:** Added a navigation bar at the top of the page for easy access to other sections of the application. Styled the navigation bar with CSS for a cohesive look and feel.


Developer Console - Brave
creative-otter-tgjysz-dev-ed.trailblaze.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File
Edit
Debug
Test
Workspace
Help
ContactManager.vfp
OpportunityManager.vfp
OpportunityManagerController.apxc
Preview
API Version
60
Search:
(Use /re/ syntax for regexp search)

```
<apex:page controller="OpportunityManagerController" sidebar="false" showHeade
    <head>
        <apex:stylesheet value="{!URLFOR($Resource.GroupStyles)}" />
        <link href="https://fonts.googleapis.com/icon?family=Material+Icons" r
    </head>
    <apex:form >
        <apex:pageMessages />
        <div class="header">
            <nav>
                <!-- Display the uploaded image -->
                <apex:image value="{!URLFOR($Resource.FBCLogo)}" alt="FBC Logo
                <!-- Output Links for Navigation -->
                <apex:outputLink value="/apex/ContactManager">
                    <i class="material-icons">contacts</i>
                    Contacts
                </apex:outputLink>
                <apex:outputLink value="/apex/OrderManager">
                    <i class="material-icons">inventory</i>
                    Orders
                </apex:outputLink>
                <apex:outputLink value="/apex/AccountLeadManager">
                    <i class="material-icons">groups</i>
                    Accounts/Leads
                </apex:outputLink>
                <apex:outputLink value="/apex/WorkOrderManager">
```

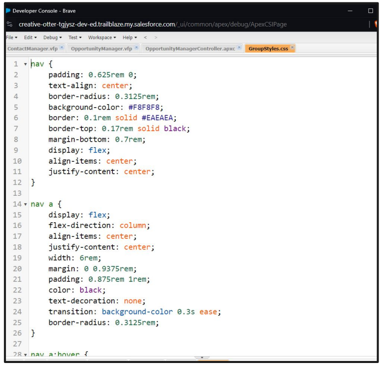

Developer Console - Brave
creative-otter-tgjysz-dev-ed.trailblaze.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File
Edit
Debug
Test
Workspace
Help
ContactManager.vfp
OpportunityManager.vfp
OpportunityManagerController.apxc
Code Coverage: None
API Version
60

```
public with sharing class OpportunityManagerController {
    public List<Opportunity> opportunities { get; set; }
    public Opportunity newOpportunity { get; set; }
    public String deleteId { get; set; }

    public OpportunityManagerController() {
        opportunities = [SELECT Id, Name, CloseDate, StageName FROM Opportunit
        newOpportunity = new Opportunity();
    }

    public PageReference createOpportunity() {
        try {
            insert newOpportunity;
            opportunities.add(newOpportunity);
            newOpportunity = new Opportunity();
            ApexPages.addMessage(new ApexPages.Message(ApexPages.Severity.INFO
        } catch (Exception e) {
            ApexPages.addMessage(new ApexPages.Message(ApexPages.Severity.ERRO
        }
        return null;
    }

    public PageReference deleteOpportunity() {
        try {
            Opportunity oppToDelete = [SELECT Id, Name, CloseDate, StageName F
            delete oppToDelete;
```


Developer Console - Brave
creative-otter-tgjysz-dev-ed.trailblaze.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File
Edit
Debug
Test
Workspace
Help
ContactManager.vfp
OpportunityManager.vfp
OpportunityManagerController.apxc
GroupStyles.css

```
nav {
    padding: 0.625rem 0;
    text-align: center;
    border-radius: 0.3125rem;
    background-color: #F8F8F8;
    border: 0.1rem solid #EAEAEA;
    border-top: 0.17rem solid black;
    margin-bottom: 0.7rem;
    display: flex;
    align-items: center;
    justify-content: center;
}

nav a {
    display: flex;
    flex-direction: column;
    align-items: center;
    justify-content: center;
    width: 6rem;
    margin: 0 0.9375rem;
    padding: 0.875rem 1rem;
    color: black;
    text-decoration: none;
    transition: background-color 0.3s ease;
    border-radius: 0.3125rem;
}

nav a:hover {
```

# Use Case Row 38

**Use Case:** FBC's logo should surface on each of our pages within the Visualforce application.

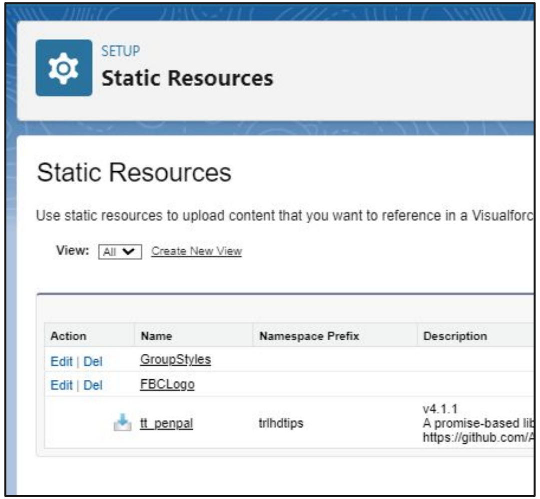
**Comments:**

**Static Resource for Logo:** Uploaded the FBC logo image as a static resource in Salesforce. Named the static resource appropriately (e.g., FBC_Logo) for easy reference in Visualforce pages.

**Visualforce Page Updates:** Edited all Visualforce pages to include the FBC logo. Ensured the logo appears consistently on each page by using a common header component.

**Navigation Bar:** Refined the navigation bar design using CSS to maintain a cohesive look and feel across the application. Incorporated relevant icons from Google APIs to enhance the user experience and improve navigation.

**Consistency Across Pages:** Verified that the navigation bar and logo appear consistently across all Visualforce pages. Ensured the integration of CSS and logo did not disrupt the layout or functionality of any pages.

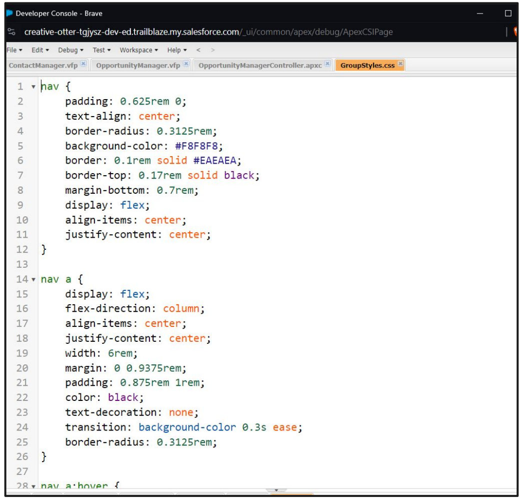


Static Resources

Use static resources to upload content that you want to reference in a Visualforc

View: All Create New View

| Action | Name | Namespace Prefix | Description |
|---|---|---|---|
| Edit \| Del | GroupStyles | | |
| Edit \| Del | FBCLogo | | |
| | tt_penpal | trlhdtips | v4.1.1<br>A promise-based lib<br>https://github.com/A |

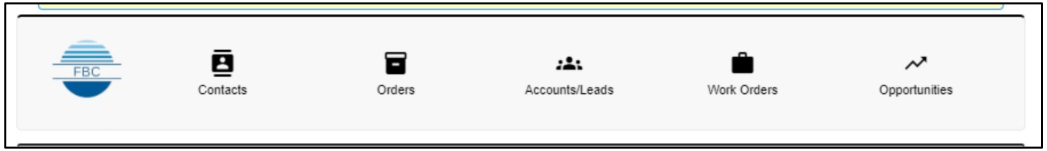


creative-otter-tgjysz-dev-ed.trailblaze.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

```css
nav {
    padding: 0.625rem 0;
    text-align: center;
    border-radius: 0.3125rem;
    background-color: #F8F8F8;
    border: 0.1rem solid #EAEAEA;
    border-top: 0.17rem solid black;
    margin-bottom: 0.7rem;
    display: flex;
    align-items: center;
    justify-content: center;
}

nav a {
    display: flex;
    flex-direction: column;
    align-items: center;
    justify-content: center;
    width: 6rem;
    margin: 0 0.9375rem;
    padding: 0.875rem 1rem;
    color: black;
    text-decoration: none;
    transition: background-color 0.3s ease;
    border-radius: 0.3125rem;
}

nav a:hover {
```



# Richard

Sales Team - case 14 and 21

# Ash

- I will be a Sales user
- Will go to the Account page and demonstrate the Customer Service Related List and show the Roll-up summary
- User will than try and make a new email with different domain in Account
- The user will try and create a work order using the Visual Force

# Evgeny

Technician manager 12, 30, 41

# Jay

Ensure that when a technician is assigned to a work order they automatically gain access to the work order record.

Developed a Visualforce page by creating a controller that handles all the queries and sends them to the view page.