

ENRICHED COACHING CENTER

**A PROJECT REPORT Submitted
partial fulfilment of the
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MASTER OF COMPUTER APPLICATION

by

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LUCKNOW
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CERTIFICATE

Certified that **Niharika Maheshwari (1900290149066)** has carried out the project work presented in this project report entitled “**Coaching Center**” for the award of Master of Computer Application from Dr. A.P.J. Abdul Kalam Technical University, Lucknow under my supervision. The report embodies result of original work, and studies are carried out by the student himself and the contents of the report do not form the basis for the award of any other degree to the candidate or to anybody else from this or any other University.

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ENRICHED COACHING CENTER

ABSTRACT

Coaching centres offer **classes** as per subjects and help students to prepare well. **Coaching centres** offering specialized **classes** for Joint and Management entrances are already very popular. In the last few years many students have cracked entrance exams successfully after studying at these **coaching centres**.

Coaching is the skill of providing ongoing and specific feedback in a supportive manner for employee learning, development and improvement. A process aimed at exerting a positive influence to improve the behavior or performance of a person.

Coaching classes are always played a role in proper guidance. If you want to stay in the competition then you need a regular and routine life without having any stress. Don't force your children to attend the classes. Make them understand that these types of classes have. Actually attended a coaching class has lots of benefits which will teach you more and make you update more as this type of classes is full with fresh flocks of students and their ideas and curiosity.

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CHAPTER 1

INTRODUCTION

1.1. Project Description

The new way of building and running applications are enabled by the world of cloud computing, where we can access applications, over the Internet as utilities, rather than as pieces of software running on your desktop or in the server room. This model is already quite common for consumer apps like email and photo sharing, and for certain business applications, like customer relationship management (CRM). The Force.com platform is the world's first Platform as a Service (PaaS), enabling developers to create and deliver any kind of business application in the cloud, entirely on-demand and without software. It's a breakthrough new concept that is making companies radically more successful by letting them translate their ideas into deployed applications in record time. Building, sharing, and running business applications have never been so easy. Building and running business applications with traditional software has always been too complex, slow, and expensive. A new model, called cloud computing, has emerged over the last decade to address this problem. Applications that run in the cloud are delivered as a service so companies no longer have to buy and maintain hardware and software to run them. Salesforce.com pioneered this model with applications business over the last decade. More recently, Force.com have opened up the infrastructure and made it available for anyone building any business application

and running it on the servers using the Force Platform. The Force Platform allows you to store structured data, implement business logic with workflow rules, approval processes and custom code, support Web browsers, integrate with other applications, do reporting and analytics and scale up or down—all with sub second response time, high availability, and security you need to run your mission critical business apps. Data are store on cloud where all the information will be stored safely and access anywhere, anytime by authorize person.

1.2. Project Scope

This is an application project for understanding and demonstrating cloud computing capabilities using Force.com. I use Sales Force features to achieve the goal. The objective of this application is to develop and deploy an application in the sales force environment.

This application project must satisfy all type of users and should enable all cloud computing capabilities. It is assumed that this application will be developed in the following environment:

- Force.com environment
- Visualforce as the developing language

1.3. Hardware / Software used in the Project

Table 1.1 Hardware

Hardware	Configuration
Processor	Intel® Core™ i3-7100U CPU @2.4GHz
RAM	4GB
Monitor	HP
Modem	Internet Connectivity

Table 1.2 Software

Software	Configuration
Operating System	Windows XP /7/8/10
Software	Chrome, Microsoft Edge

1.3.1. Technology Description

SALESFORCE

Salesforce.com, Inc. is an American cloud-based software company headquartered in San Francisco, California. It provides customer-relationship management (CRM) service and also sells a complementary suite of enterprise applications focused on customer service, marketing automation, analytics, and application development.

Salesforce is the primary enterprise offering within the Salesforce platform. It provides companies with an interface for case management and task management, and a system for automatically routing and escalating important events. The Salesforce customer portal provides customers the ability to track their own cases, includes a social networking [plug-in](#) that enables the user to join the conversation about their company on [social networking Web sites](#), provides analytical tools and other services including email alert, Google search, and access to customers' entitlement and contracts

Service Nature of Salesforce:

1. **Salesforce as SaaS (Software as a Service):** There is no need for installation, setup or downloads but you just have to log in and start using the software apps across the cloud. Isn't it more convenient and amazing? The answer is a big "YES" when using Salesforce CRM for your business.
2. **Salesforce as PaaS (Platform as a service):** Here, there is no need for a separate platform, but you can use code created by other developers to deploy apps. Obviously, you have to customize it as per your business needs, but it saves a lot of time and money as demanded by businesses today.

3. **Salesforce as IaaS (Infrastructure as a service):** Here, there is no need for installing any hardware or software program, but data and apps are stored securely on the cloud. Even you don't have to take the backup, but the cloud will take care of it automatically.

1.3.1.1 APEX

Apex is a proprietary programming language provided by the Force.com platform to developers similar to [Java](#) and [C#](#). It is a strongly typed, object-oriented, case-insensitive programming language, following a dot-notation and curly-brackets syntax. Apex can be used to execute programmed functions during most processes on the Force.com platform including custom buttons and links, event handlers on record insertion, update, or deletion, via scheduling, or via the custom controllers of Visualforce pages.

Due to the multitenant nature of the platform, the language has strictly imposed governor limitations to guard against any code monopolizing shared resources. Salesforce provides a series of [asynchronous processing](#) methods for Apex to allow developers to produce longer-running and more complex Apex code.

1.3.1.2 LIGHTNING

Salesforce made public the [front end](#) of its platform, called Lightning. This component-based framework is what the Salesforce mobile app is built on. Salesforce built on this framework in 2015 by releasing the Lightning Design System, an HTML style framework with default CSS styling built in. This framework allows customers to build their own components to either use in their internal instances or sell on the AppExchange.

The Salesforce Lightning App Builder is a tool for [rapid application development](#) of responsive web interfaces. This interface allows for different screens to be put together based on Lightning components. This can be used as layouts for records or specific applications.

Lightning Experience, released in 2016, is the new redesigned interface in Salesforce for processes enhancement. Since then all the apps available on AppExchange need to be Lightning and those built on Classic have to migrate to Lightning as Classic is not to be updated any more by Salesforce. The platform offers an option for developers to employ migration techniques to enable the new user interface and switch to Lightning.

1.3.1.3 JavaScript

JavaScript (often shortened to **JS**) is a lightweight, interpreted, object-oriented language with first-class functions, and is best known as the scripting language for Web pages, but it's used in many non-browser environments as well. It is a prototype-based, multi-paradigm scripting language that is dynamic, and supports object-oriented, imperative, and functional programming styles.

JavaScript runs on the client side of the web, which can be used to design / program how the web pages behave on the occurrence of an event. JavaScript is an easy to learn and also powerful scripting language, widely used for controlling web page behavior.

Contrary to popular misconception, **JavaScript is *not* "Interpreted Java"**. In a nutshell, JavaScript is a dynamic scripting language supporting prototype based object construction. The basic syntax is intentionally similar to both Java and C++ to reduce the number of new concepts required to learn the language. Language constructs, such as if statements, for and while loops, and switch and try ... catch blocks function the same as in these languages (or nearly so).

JavaScript can function as both a procedural and an object oriented language. Objects are created programmatically in JavaScript, by attaching methods and properties to otherwise empty objects **at run time**, as opposed to the syntactic class definitions common in compiled languages like C++ and Java. Once an object has been constructed it can be used as a blueprint (or prototype) for creating similar objects.

JavaScript's dynamic capabilities include runtime object construction, variable parameter lists, function variables, dynamic script creation (via eval), object introspection (via for ... in), and source code recovery (JavaScript programs can decompile function bodies back into their source text).

1.3.1.4. SOQL

SOQL is Salesforce Object Query Language that is highly similar to SQL (Structured Query Language). With the help of SOQL, you can always search the organizational data wisely. It can be combined with APEX, Visualforce, or Force.com IDE too. While writing a query using SOQL, you should use SELECT command and a lot of other conditions too.

The SOQL can be used when you have the basic idea of objects and related data. It can be used to retrieve data from one or multiple objects that are connected together based on requirements. It helps in getting the total count and sort queries as well. Further, it can be combined with SOSL (Salesforce Object Search Language) to search the organizational data when they are not sure about objects.

SOSL is programmed in such a way to work on the basis of the search index. To improve the performance of searching, you should combine SOQL and SOSL together because searching work is done better by SOSL as compared to the SOQL.

CHAPTER 2

LITERATURE REVIEW

As users of the Internet, we're all familiar with the fascinating, innovative, creative, and sometimes silly ways in which it has changed how we work and play. From social networking sites to wikis to blogs, and more, it's exciting to watch the innovations taking place that are changing the ways we communicate and collaborate.

While these changes have certainly impacted how we work with content, a similar set of Internet-driven ideas and technologies is changing how we build and work with business applications.

While yesterday's business applications required thousands, if not millions, of dollars and sometimes years of professional services help to set up and customize, the technologies offered by the Internet today make it much easier to create, configure, and use business applications of all kinds. Indeed, the power of the Internet has given us the ability to solve new kinds of business problems that, because of complexity or cost, had previously remained out of reach.

Just as the changes that moved publishing technology from paper to bits made it possible for us to have information about anything in the whole world right at our fingertips, the changes in application technology make it similarly possible to imagine a robust, enterprise-class application for almost any business need. Sound pretty good? Then you're probably wondering: "What's the magic that makes this possible?"

These new ways of building and running applications are enabled by the world of cloud computing, where you access applications, or apps, over the Internet as utilities, rather than as pieces of software running on your desktop or in the server room.

This model is already quite common for consumer apps like email and photo sharing, and for certain business applications, like customer relationship management (CRM).

By using the existing system we have to maintain a high configuration system to run some huge software's which is used to develop the applications. This may need huge cost to buy and maintain.

We have to buy the each and every software's which are used for developing the applications. Also we have to update the software's for latest version. This needs maintenance risks such as economical risk and technical risk.

The main disadvantage of the existing system over cloud environment is lack of portability. Even though we are having high configured systems and updated software's we have to take the system with us when we are moving from one place to other place. This will create risk to the users.

The main disadvantage of the existing system is lack of disaster recovery. That means in the case of any disaster occurs all the data available in the system cannot be recovered. Thus it may leads to the loss of data.

The existing system also needs high initial out lay to set up the system.

2.1. Proposed System

Since there are lot of problems available with the existing system a new technology is used in this project called as **cloud computing**. The proposed system in this project is to develop an application in the cloud computing environment and have to deploy it and to launch the application in cloud.

The cloud environment used in this project is called as **salesforce environment**.

A simple application is developed in the cloud environment and deployed in the same environment using the tools provided there itself. The application is launched as a site inside the cloud. The security provided by the platform provider (salesforce) is used in this application.

Feasibility study is made to see if the project on completion will serve the purpose of the organization for the amount of work, effort and the time that spend on it. Feasibility study lets the developer foresee the future of the project and the usefulness. A feasibility study of a system proposal is according to its workability, which is the impact on the organization, ability to meet their user needs and effective use of resources. Thus, when a new application is proposed it normally goes through a feasibility study before it is approved for development.

The document provides the feasibility of the project that is being designed and lists various areas that were considered very carefully during the feasibility study of this project such as Technical, Economic and Operational feasibilities.

2.2. Technical Feasibility

The system must be evaluated from the technical point of view first. The assessment of this feasibility must be based on an outline design of the system requirement in the terms of input, output, programs and procedures. Having identified an outline system, the investigation must go on to suggest the type of equipment, required method developing the system, of running the system once it has been designed.

Technical issues raised during the investigation are:

Does the existing technology sufficient for the suggested one?

Can the system expand if developed?

The project should be developed such that the necessary functions and performance are achieved within the constraints. The project is developed within latest technology. Through the technology may become obsolete after some period of time, due to the fact that never version of same software supports older versions, the system may still be used. So, there are minimal constraints involved with this project. The system has been developed using Java the project is technically feasible for development.

2.3. Operational Feasibility

Proposed projects are beneficial only if they can be turned out into information system. That will meet the organization's operating requirements. Operational feasibility aspects of the project are to be taken as an important part of the project implementation. Some of the important issues raised are to test the operational feasibility of a project includes the following:

- Is there sufficient support for the management from the users?
- Will the system be used and work properly if it is being developed and implemented?
- Will there be any resistance from the user that will undermine the possible application benefits?

This system is targeted to be in accordance with the above-mentioned issues. Beforehand, the management issues and user requirements have been taken into consideration. So, there is no question of resistance from the users that can undermine the possible application benefits.

2.4. Economic Feasibility

The developing system must be justified by cost and benefit. Criteria to ensure that effort is concentrated on project, which will give best, return at the earliest. One of the factors, which affect the development of a new system, is the cost it would require.

The following are some of the important financial questions asked during preliminary investigation:

The costs conduct a full system investigation.

The cost of the hardware and software.

The benefits in the form of reduced costs or fewer costly errors.

Since the system is developed as part of project work, there is no manual cost to spend for the proposed system. Also, all the resources are already available, it gives an indication of the system is economically possible for development.

2.5. Behavioral Feasibility

An estimate should be made of how strong a reaction the user staff is likely to have towards the development of a computerized system. It is common knowledge that computer installation have something to do with Turnover, Transfers and changes in employee Job Status. Normal human psychology of human beings indicate that people are resistant to change and computers are known to facilitate change. Any project formulations should consider this factor also. Before the development of the Project titled "Delhi Metro", the need to study the feasibility of the successful execution of the project was felt and thus the following factors are considered for a Feasibility Study.

1. Need Analysis.
2. Provide the users information pertaining to the preceding requirement.

CHAPTER 3

DATABASE MANAGEMENT

A Database in Salesforce is defined as the organized collection of objects where each object contains some information. Data is stored in the form of database tables for people, things, contacts, etc that are important for any project in the future. Each database has a set of certain rows and columns where information is stored in the form of fields and records. It helps produce database systems

1. That meet the requirements of the users
2. Have high performance.

One such important concept in Oracle is the Salesforce database class. Database classes can specify either you want to continue the execution or not if some error is encountered. You can also add one Boolean parameter to the Salesforce database class to make it more functional. The same task can be completed using DML statements but you are not free to keep a check on query execution.

Another important concept is the Salesforce database architecture. It has the multi-tenancy architecture where clouds are used to share resources reliably and securely. The multitenant Salesforce database architecture has a huge impact on application delivery and the infrastructure. In simple words, we can say that Salesforce database architecture is highly similar to the architecture of relational database systems.

3.1 Schema Builder

Fig 3.1 Shows the relationship between Custom Objects.

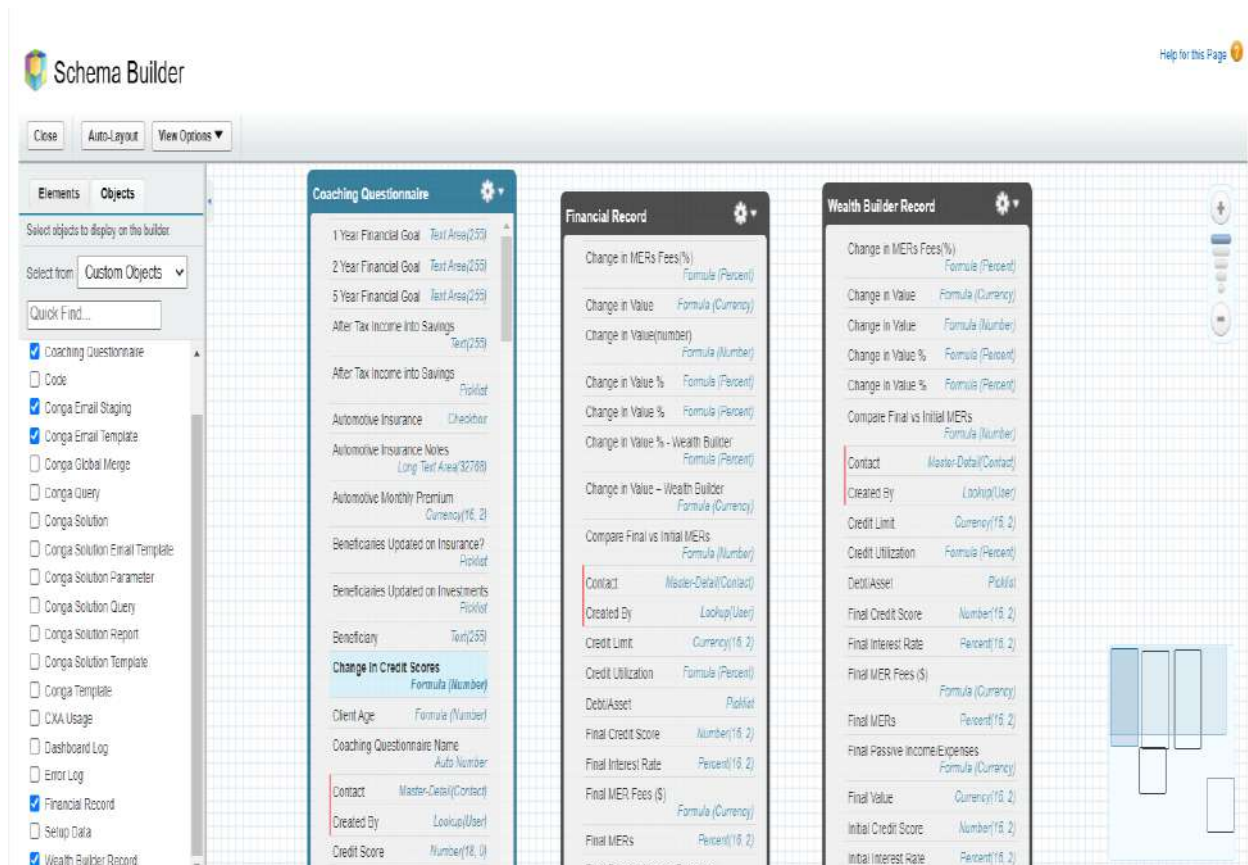


Fig. 3.1 Schema Builder

3.2. Flow Graphs

3.2.1 Zero Level DFD



Fig. 3.2.1 Zero Level DFD

3.2.2 One Level DFD

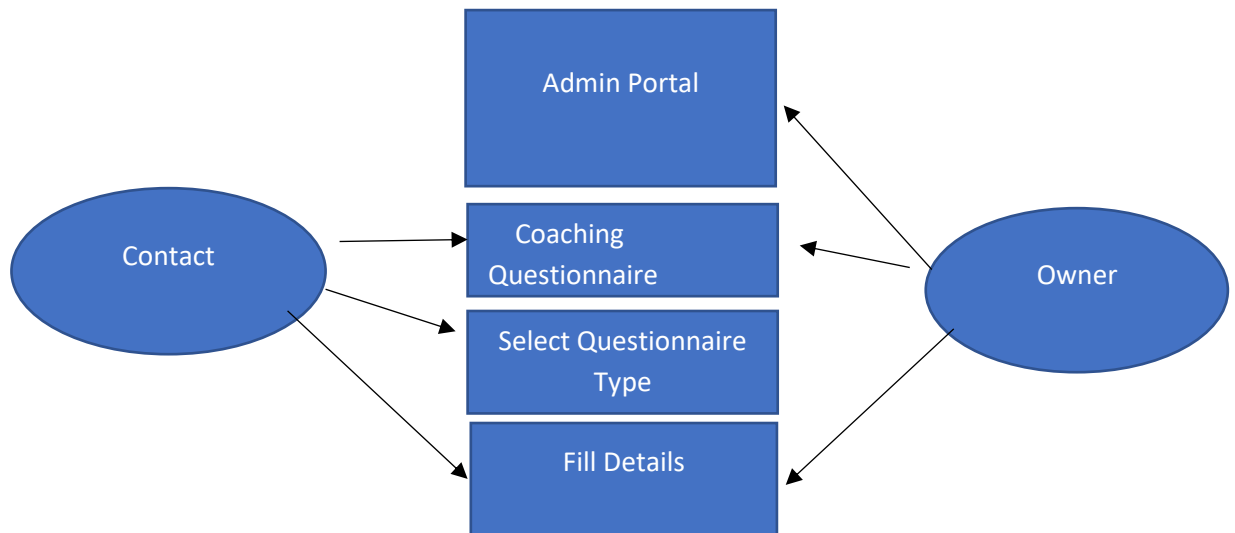


Fig. 3.2.2 One Level DFD

CHAPTER 4

OBJECT INTERFACES

4.1. Contact Object

Fig. 4.1 It show all the recent contacts which can be added with this Coaching center.

The screenshot displays the Salesforce Contacts page. At the top, there's a navigation bar with 'Contacts' and 'Home' links. Below this, a 'View:' dropdown is set to 'Wealth Builder Contacts', with 'Go!' and 'Edit | Create New View' options. The main section is titled 'Recent Contacts' and features a 'New' button and a 'Recently Viewed' dropdown. A table lists recent contacts with columns for Name, Account Name, and Phone. The table contains 10 rows of data, with the 6th row (Mistry, Saagar) highlighted. Below the table is a 'Show 25 items' link. On the left, a 'Reports' sidebar lists 'HTML Email Status Report', 'Partner Accounts', 'Mailing List', and 'Contact History Report'. On the right, a 'Tools' sidebar lists 'Sync to Outlook', 'Import Accounts & Contacts', 'Mass Delete Contacts', and 'Mass Email Contacts'.

Name	Account Name	Phone
Li, Jia Li	Apex Results Realty	(905) 962-0329
Goddu, Cherie		4033928136
Dixit, Rupali		43221
Sigesmund, Cindy		416 931 0839
Thompson, Julia		18192304185
Roch, Michelle		647-589-8035
Mistry, Saagar		6476803224
Atkinson, Sally		7058 163865
Joiner, Kelly		236 887-1977
BADIOL CHERRY		7809350528

Fig. 4.1 Contact Object Shows Recent Contacts

Fig. 4.1.1. In this snapshot we can see to add Contact and along with coaching program details and other information.

Contact Edit

New Contact

Help for this Page

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

Contact Edit

Save Save & New Cancel

Contact Information

Salutation

--None--

First Name

Last Name

Phone

Email

Contact Owner

Suraj Tripathi

Timezone

--None--

Partner's Name

Other Phone

Partner's Email

Next Call Time

[8/13/2021 4:07 AM]

I = Required Information

ActivCampaign

Learning you are interested in

--None--

Monthly Income

--None--

Monthly Expenses

--None--

Total Amount of Debt (excl mortgage)

--None--

Total amount of assets?

--None--

Debt types

Available

Chosen

Current financial situation?

--None--

Call motivation?

--None--

Biggest financial hurdle?

--None--

Why is this difficult for you?

--None--

Why is it important to overcome this?

--None--

What happens if change doesn't occur?

--None--

Figure 4.1.1. Adding New Contact

Fig. 4.1.2. This shows the financial records detail like type,initial value,final value,change in value etc. and show wealth builder records as well as coaching questionnaires which contain questionnaire type like incoming and outgoing type.

Financial Records

New Financial Record

Financial Records Help

Action	Type	Initial Value	Final Value	Change in Value	Initial Interest Rate	Final Interest Rate	Initial MERs	Final MERs	Notes
Edit Del	Monthly Spend	\$12,345.00	\$123.00	-\$12,222.00					

Wealth Builder Records

New Wealth Builder Record

Wealth Builder Records Help

Action	Wealth Builder Year	Type	Initial Value	Final Value	Change in Value	Initial Interest Rate	Final Interest Rate	Initial MERs	Final MERs	Notes
Edit Del	2	Car Loan	\$1,234.00	\$123.00	-\$1,111.00	1,234.00	1,234.00	1,234.00		
Edit Del		Car Loan			\$0.00					

Coaching Questionnaires

New Coaching Questionnaire

Coaching Questionnaires Help

Action	Coaching Questionnaire Name	Questionnaire Type
Edit Del	CQ-Q1283	Incoming
Edit Del	CQ-Q1286	Incoming
Edit Del	CQ-Q1287	Incoming
Edit Del	CQ-Q1289	Outgoing
Edit Del	CQ-Q1307	Incoming
Edit Del	CQ-Q1309	Incoming
Edit Del	CQ-Q1308	Incoming
Edit Del	CQ-Q1313	Incoming

Opportunities

New Opportunity

Opportunities Help

No records to display

Notes

New Note

Notes Help

No records to display

Fig. 4.1.2 Contact Detail

Fig 4.2. Report and Dashboard object

It shows all the reports and dashboards which are available in this coaching center which includes several folders which have been created.

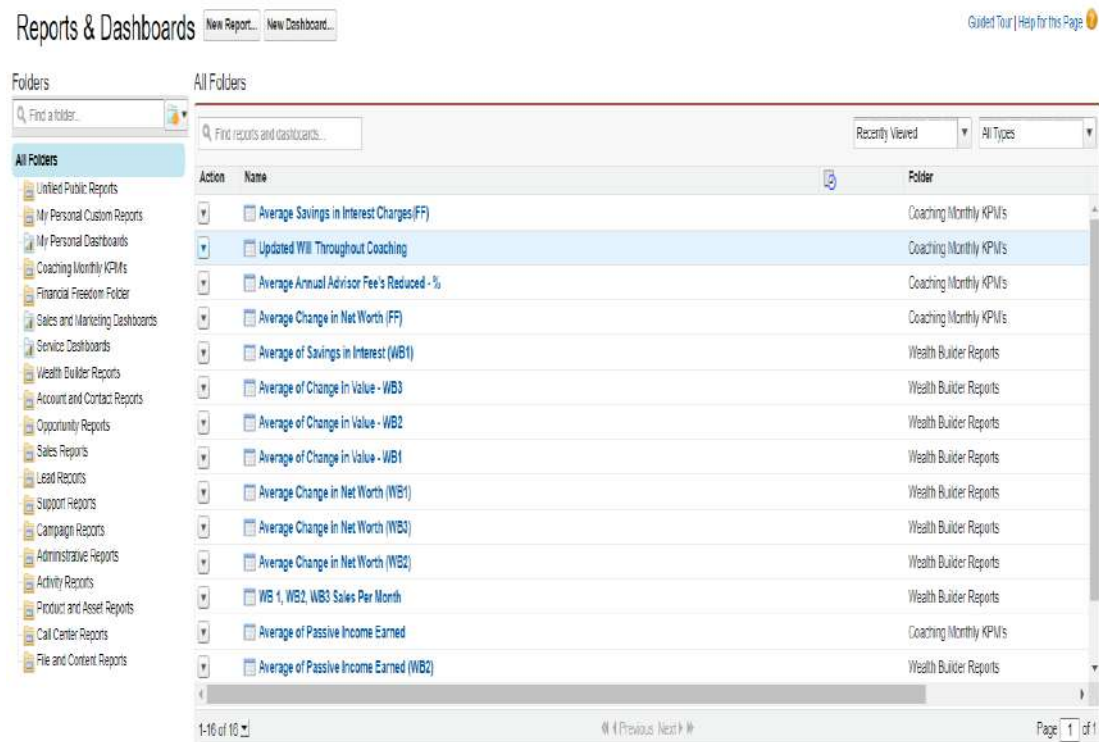


Fig. 4.2. Reports and Dashboard

Fig 4.2.1. In this figure how we create new reports by selecting the report type like accounts and contacts , leads, opportunity, quotes etc and then select create option.

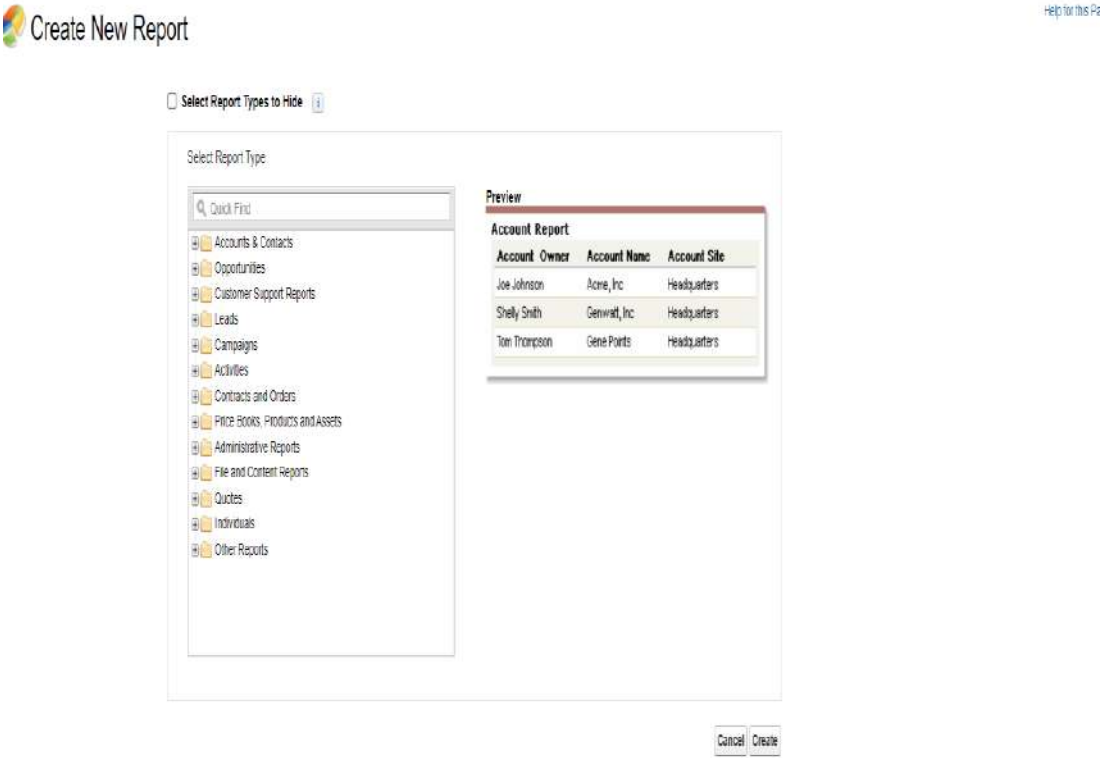
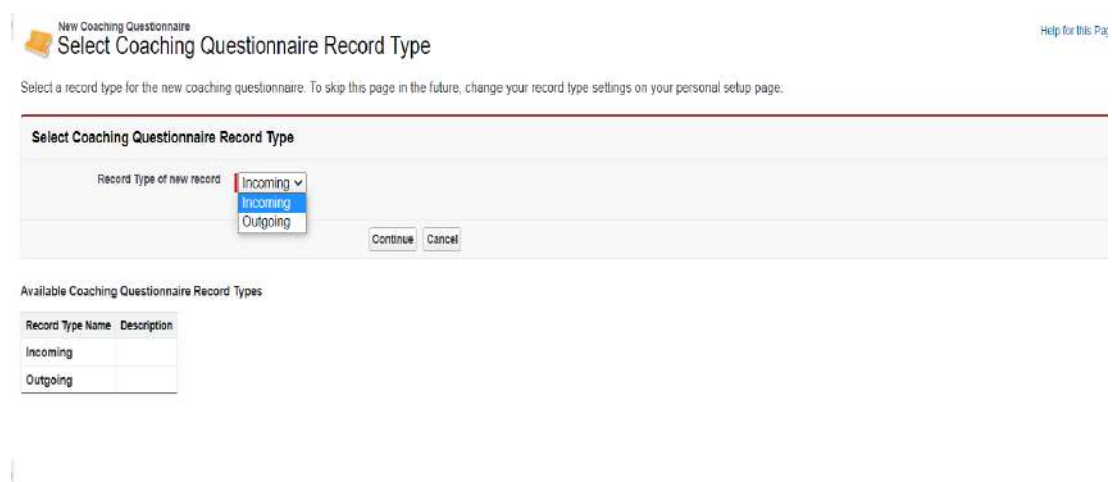


Fig. 4.2.1 Create New Report

Fig. 4.3 SELECT COACHING QUESTIONNAIRE RECORD TYPE

This object shows when a person selecting the coaching questionnaire it should be select which record type it fill the details like incoming and outgoing type and fill the details according to it.



New Coaching Questionnaire

Select Coaching Questionnaire Record Type

Select a record type for the new coaching questionnaire. To skip this page in the future, change your record type settings on your personal setup page.

Select Coaching Questionnaire Record Type

Record Type of new record: Incoming

Continue Cancel

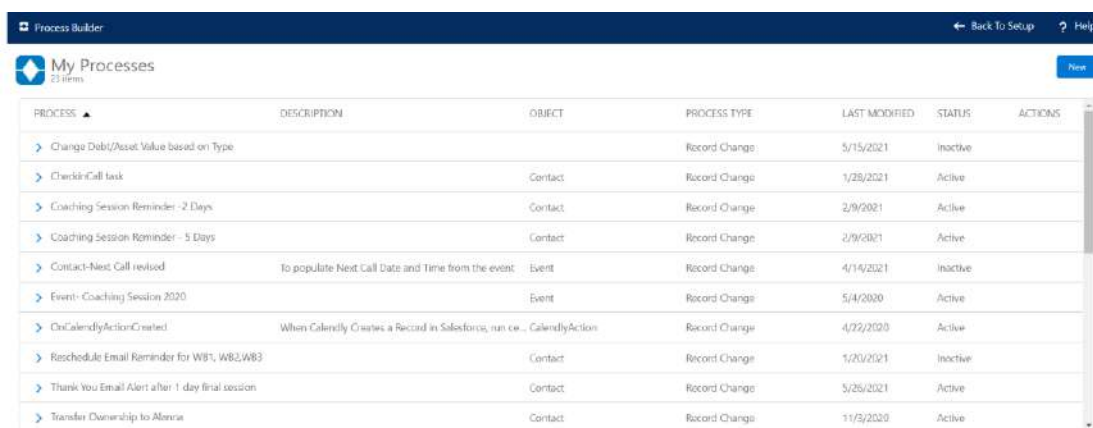
Available Coaching Questionnaire Record Types

Record Type Name	Description
Incoming	
Outgoing	

Fig. 4.3 Select Coaching Questionnaire Record Type

Fig. 4.4 PROCESS BUILDER

Process builder is used to automate more complex business **process** just by a few point and click actions. It provides a user – friendly representation for building a **process** in **Salesforce**.



The screenshot shows the Salesforce Process Builder interface. At the top, there's a header bar with 'Process Builder' on the left and 'Back To Setup' and 'Help' on the right. Below the header, there's a section titled 'My Processes' with a sub-header '23 items'. A 'New' button is located to the right of this section. The main part of the interface is a table listing various processes. The table has columns for 'PROCESS', 'DESCRIPTION', 'OBJECT', 'PROCESS TYPE', 'LAST MODIFIED', 'STATUS', and 'ACTIONS'. The processes listed include 'Change Debt/Asset Value based on Type', 'CheckinCall task', 'Coaching Session Reminder - 2 Days', 'Coaching Session Reminder - 5 Days', 'Contact-Next Call revised', 'Event- Coaching Session 2020', 'OnCalendarActionCreated', 'Reschedule Email Reminder for WB1, WB2, WB3', 'Thank You Email Alert after 1 day final session', and 'Transfer Ownership to Alanna'.

PROCESS	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS
> Change Debt/Asset Value based on Type			Record Change	5/15/2021	Inactive	
> CheckinCall task		Contact	Record Change	1/28/2021	Active	
> Coaching Session Reminder - 2 Days		Contact	Record Change	2/9/2021	Active	
> Coaching Session Reminder - 5 Days		Contact	Record Change	2/9/2021	Active	
> Contact-Next Call revised	To populate Next Call Date and Time from the event	Event	Record Change	4/14/2021	Inactive	
> Event- Coaching Session 2020		Event	Record Change	5/4/2020	Active	
> OnCalendarActionCreated	When Calendly Creates a Record in Salesforce, run co - CalendlyAction		Record Change	4/22/2020	Active	
> Reschedule Email Reminder for WB1, WB2, WB3		Contact	Record Change	1/20/2021	Inactive	
> Thank You Email Alert after 1 day final session		Contact	Record Change	5/25/2021	Active	
> Transfer Ownership to Alanna		Contact	Record Change	11/3/2020	Active	

Fig. 4.4 Process Builder

Fig. 4.5 CLASSIC EMAIL TEMPLATES

In Salesforce, you can create four different types of email templates: text, **HTML with Classic Letterhead**, custom, and Visualforce. All of these email templates can include text, merge fields, and attached files.

Email Template Detail

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

Folder	Untitled Public Classic Email Templates	
Email Template Name	After Session 6 - Report, Outgoing Questionnaire & Next Steps	Available For Use <input checked="" type="checkbox"/>
Template Unique Name	After_Session_6_Report_Outgoing_Questionnaire_Next_Steps	Last Used Date
Encoding	Unicode (UTF-8)	Times Used
Author	Suraj Tripathi Change	
Description		
Created By	Suraj Tripathi 7/7/2021 9:53 AM	Modified By Suraj Tripathi 7/7/2021 9:53 AM

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

Congratulations! You should be so proud of yourself. Isn't it amazing how much your finances can change in such a short period of time? And this is just the beginning. What you've learned over the last 6 months is something that you can carry with you forever.

Although today marks the end of your first session with our coaching program, I want you to continue using the valuable tools that we have provided you. By actively using these tools, you'll be successful in managing your personal finances moving forward, and will be able to make your money work more efficiently.

Next Steps:

- **If you haven't had a chance to fill out our coaching survey yet, please use this link to do so now.** Your name will be entered into an annual draw for a prize valued at \$250.
- Did you know that we have a referral program? For every referral who signs up and completes all of the Financial Freedom coaching sessions, we will provide YOU and YOUR referral with \$125. Please share [this link](#) with your network so they can sign up for a FREE 45-minute financial strategy call.
- You have unlimited access to our [online portal](#) where all of our online curriculum is stored along with blank worksheets that we used in our coaching program.
- You have {{Recipient.Bootcamp_Tickets_Remaining__c}} tickets available to use for an upcoming live event. Keep an eye out for an email that has our upcoming live events and how you can register.

momentum that we've built with your finances? I've attached some information about our [Wealth Builder](#) program. Our Wealth Builder clients have seen the following results over the 1 year program.

- o - Increase in Net Worth by \$161,653.79
- o - Increase in Passive Income by \$46,648.46
- o - Decrease in Consumer Loans by \$6,158.78
- o - Decrease in Interest Charges from Consumer Loans by \$5,084.90
 - When you're finished going through the brochure, and you're ready to sign up, you can do so [HERE](#). Once we receive your confirmation, I'll reach out and we can book in our 1st Wealth Builder Session. This program will take your finances to the next level.

Thanks again for being so great during your coaching. It was a pleasure working with you and I hope that you continue to work with us in the future.

{!Contact.OwnerFullName}

{!Contact.OwnerTitle}

e: {!Contact.OwnerEmail}

NOTE: This material has been prepared for informational and educational purposes only. It should not be relied on for tax, legal, investment or accounting advice. You should consult your own tax, legal, investment, and accounting advisors before engaging in any transaction.

Fig. 4.5.1 Classic Email Templates

Coaching Session 5 Day Reminder Email custom new

Preview your email template below.

Email Template Detail			
<div> Edit Properties Edit HTML Version Edit Text Version Delete Close </div>			
Folder	Untitled Public Classic Email Templates		
Email Template Name	Coaching Session 5 Day Reminder Email custom new	Available For Use	✓
Template Unique Name	Coaching_Session_5_Day_Reminder_Email_custom_new	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Suraj Tripathi (Change)		
Description			
Created By	Suraj Tripathi 1/20/2021 1:53 AM	Modified By	Suraj Tripathi 2/4/2021 6:17 AM
<div> Edit Properties Edit HTML Version Edit Text Version Delete Clone </div>			

HTML Preview



Hi {!Contact.Email_Greeting__c},

I wanted to send you a friendly reminder that your next financial coaching session is scheduled for {!Contact.Next_Call_Time__c}.

Here's what you need to have prepared before this session:

- Have your homework completed and sent to me in advance. It would be in the email that was sent to you after our last session (or the homework from the welcome email if this is your first session).
- Make sure you are in front of your computer with limited distractions. Do not attempt to complete your call while driving. Your time is very valuable and so is mine. If a session is missed or cancelled within 24 hours of the scheduled time, or if you reschedule the same meeting twice, you will forfeit that session. So, please honour my time, and I will honour yours. If for whatever reason you do need to reschedule, use [this link](#). Please email me directly if you have any questions.

!!Contact.OwnerEmail!!

Plain Text Preview

Hi {!Contact.Email_Greeting__c}.

I wanted to send you a friendly reminder that your next financial coaching session is scheduled for {!Contact.Next_Call_Time__c}.

Here's what you need to have prepared before this session:

- Have your homework completed and sent to me in advance. It would be in the email that was sent to you after our last session (or the homework from the welcome email if this is your first session).
- Make sure you are in front of your computer with limited distractions. Do not attempt to complete your call while driving. Your time is very valuable and so is mine. If a session is missed or cancelled within 24 hours of the scheduled time, or if you reschedule the same meeting twice, you will forfeit that session. So, please honour my time, and I will honour yours. If for whatever reason you do need to reschedule, use this link. Please email me directly if you have any questions.

{!Contact.OwnerFullName}
{!Contact.OwnerEmail}

...because everyone deserves financial awareness

Attachments

Attach File

No records to display

Fig. 4.5.2 Classic Email Templates

Fig. 4.6 CLASSIC LETTERHEADS

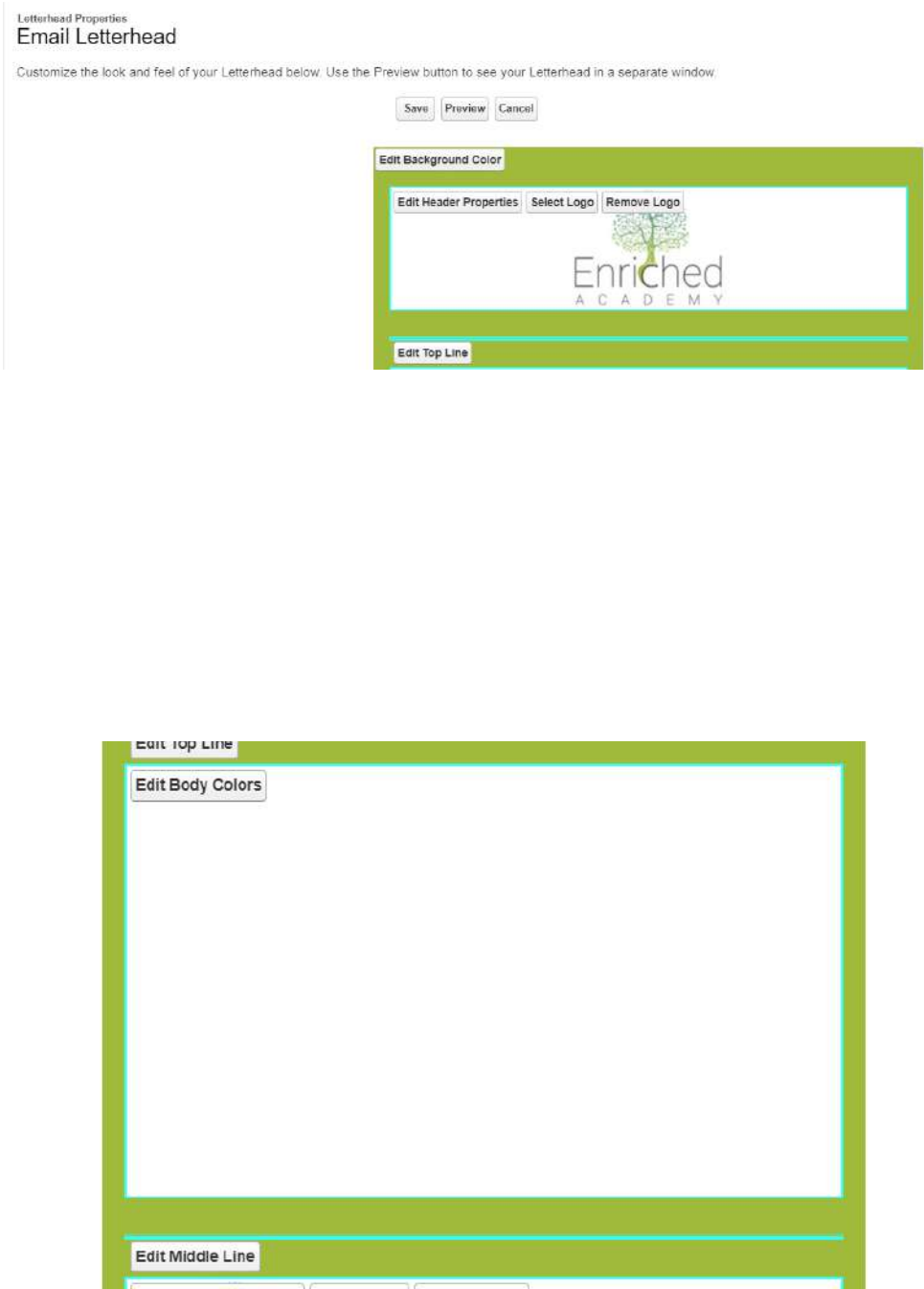
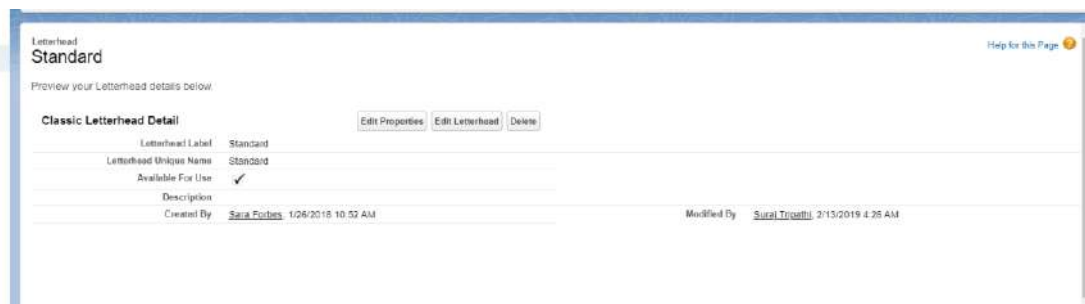




Fig. 4.6.1 Classic Letterheads



Letterhead Properties
Standard

[Help for this P](#)

Customize the look and feel of your Letterhead below. Use the Preview button to see your Letterhead in a separate window.

[Save](#) [Preview](#) [Cancel](#)

[Edit Background Color](#)



[Edit Top Line](#)

[Edit Body Colors](#)



[Edit Middle Line](#)

[Edit Footer Properties](#)

[Select Logo](#)

[Remove Logo](#)

[Edit Bottom Line](#)

Fig. 4.6.2 Standard Letterheads

CHAPTER 5

Extend Salesforce with Clicks, Not Code

Ready to go beyond the basics of Salesforce administration? Want to customize your org, push its boundaries, and enhance its functionality? You can do that and so much more without writing a single line of code. All you need is your mouse and a sense of adventure. Enhance your objects, data, and fields, customize your org's look and feel, augment your business processes, create websites, and even create apps—all using point-and-click tools.

The Force.com platform provides an enormous amount of functionality and flexibility, all of which is driven by underlying metadata. Force.com metadata is a collection of attributes that describe most components of data and applications that operate on the platform. Metadata describes the data structures in your environment, the declarative functionality implemented on the platform—even the applications you build on the platform.

To understand the power and reach of metadata, simply access a data record held in Force.com. When you access the record in your Force.com environment, the platform uses metadata to understand the structure of the record, the user interfaces defined for the record, the applications that use the user interface, even the security on that data and application.

5.1 App Setup Menu

The App Setup menu is where you will spend the most time as a developer. These menus provide access to pages that let you create and configure Force.com components and services.

Once you create a custom object, you can edit the definition of the object via the Custom Object page.

The Custom Object page provides links for adding custom fields, validations to enforce data integrity rules, database triggers, and custom buttons or links to the object's page layouts. You can also modify the attributes of standard fields, buttons, links or layouts for both the page and search dialogs, as well as add new page layouts or assign record types.

As an example, when you add a new field to a custom object, a wizard walks you through a number of steps, including:

- Selecting a field type.
- Giving the field a label, name, help text, a default value, and potentially other attributes, such as the length of the field or whether a value is required.
- Assigning security settings to the field.
- Adding the field to existing page layouts.
- Depending on the type of field in focus, the wizard may include other pages for other relevant metadata attributes.

The screenshot shows the Salesforce 'Custom Object' page for 'Coaching Questionnaire'. The page is divided into a left sidebar with navigation links and a main content area. The main content area is titled 'Custom Object Definition Detail' and includes a table of object attributes and a 'Standard Fields' table.

Custom Object Definition Detail

Attribute	Value	Attribute	Value
Singular Label	Coaching Questionnaire	Description	Created to store information when the Coaching Client responds to the survey.
Plural Label	Coaching Questionnaires	Enable Reports	<input checked="" type="checkbox"/>
Object Name	Coaching_Questionnaire	Track Activities	<input type="checkbox"/>
API Name	Coaching_Questionnaire__c	Allow in Chatter Groups	<input checked="" type="checkbox"/>
		Allow Sharing	<input checked="" type="checkbox"/>
		Allow Bulk API Access	<input checked="" type="checkbox"/>
		Allow Streaming API Access	<input checked="" type="checkbox"/>
		Track Field History	<input checked="" type="checkbox"/>
		Enable Licensing	<input type="checkbox"/>
		Deployment Status	Deployed
		Allow Search	<input checked="" type="checkbox"/>
		Help Settings	Standard salesforce.com Help Window
Created By	Sara Forbes	Modified By	Surai Tripathi
	1/24/2018 10:50 AM		6/10/2021 12:45 AM

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History
Edit	Coaching Questionnaire Name	Name	Auto Number		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Created By	CreatedBy	Lookup(User)		<input type="checkbox"/>	<input type="checkbox"/>
	Last Modified By	LastModifiedBy	Lookup(User)		<input type="checkbox"/>	<input type="checkbox"/>
Edit	Record Type	RecordType	Record Type		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Fig 5.1

Custom Fields & Relationships							
		New	Field Dependencies	Set History Tracking	Custom Fields & Relationships Help ?		
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By	Track History
Edit Del	1 Year Financial Goal	X1_Year_Financial_Goal__c	Text Area(255)			Suraj Tripathi, 12/7/2020 12:58 AM	<input type="checkbox"/>
Edit Del	2 Year Financial Goal	X2_Year_Financial_Goal__c	Text Area(255)			Suraj Tripathi, 12/7/2020 12:58 AM	<input type="checkbox"/>
Edit Del	5 Year Financial Goal	X5_Year_Financial_Goal__c	Text Area(255)			Suraj Tripathi, 12/10/2020 12:58 AM	<input type="checkbox"/>
Edit Del	After Tax Income into Savings	After_Tax_Income_into_Savings__c	Text(255)			Suraj Tripathi, 7/4/2019 7:48 AM	<input type="checkbox"/>
Edit Del Replace	After Tax Income into Savings	After_Tax_Income_into_Savings1__c	Picklist			Suraj Tripathi, 8/22/2019 9:10 AM	<input type="checkbox"/>
Edit Del	Automotive Insurance	Automotive__c	Checkbox			Suraj Tripathi, 8/22/2019 3:20 AM	<input type="checkbox"/>
Edit Del	Automotive Insurance Notes	Automobile_Insurance__c	Long Text Area(32768)			Alanna Abramsky, 7/11/2018 8:07 PM	<input type="checkbox"/>
Edit Del	Automotive Monthly Premium	Automotive_Monthly_Premium__c	Currency(16, 2)			Alanna Abramsky, 2/5/2018 10:50 AM	<input type="checkbox"/>
Edit Del Replace	Beneficiaries Updated on Insurance?	Beneficiaries_Updated_on_Insurance__c	Picklist			Suraj Tripathi, 4/29/2020 8:36 AM	<input type="checkbox"/>
Edit Del Replace	Beneficiaries Updated on Investments?	Beneficiaries_Updated_on_Investments__c	Picklist			Suraj Tripathi, 4/29/2020 8:35 AM	<input type="checkbox"/>
Edit Del	Beneficiary	Beneficiary__c	Text(255)			Sara Forbes, 7/9/2018 3:57 PM	<input type="checkbox"/>
Edit Del	Change in Credit Scores	Change_in_Credit_Scores__c	Formula (Number)			Suraj Tripathi, 4/29/2020 3:47 AM	<input type="checkbox"/>
Edit Del	Client Age	Client_Age__c	Formula (Number)			Sara Forbes, 7/19/2018 3:54 PM	<input type="checkbox"/>
Edit Del	Contact	Contact__c	Master-Detail(Contact)	<input checked="" type="checkbox"/>		Suraj Tripathi, 11/25/2020 8:49 AM	<input type="checkbox"/>
Edit Del	Credit Score	Credit_Score__c	Number(18, 0)			Suraj Tripathi, 11/25/2020 8:49 AM	<input type="checkbox"/>
Edit Del	Critical Illness Insurance	Critical__c	Checkbox			Suraj Tripathi, 8/22/2019 3:14 AM	<input type="checkbox"/>
Edit Del	Critical Monthly Premium	Critical_Monthly_Premium__c	Currency(16, 2)			Sara Forbes, 1/26/2018 10:17 AM	<input type="checkbox"/>
Edit Del Replace	Current Income Year	Current_Income_Year__c	Picklist			Alanna Abramsky, 2/5/2018 10:53 AM	<input type="checkbox"/>
Edit Del	Current Occupation/Length	Current_Occupation_Length__c	Text(255)			Sara Forbes, 1/26/2018 10:17 AM	<input type="checkbox"/>
Edit Del	Date of Birth	Date_of_Birth__c	Date			Sara Forbes, 1/26/2018 10:18 AM	<input type="checkbox"/>
Edit Del	Disability	Disability__c	Checkbox			Sara Forbes, 1/26/2018 10:18 AM	<input type="checkbox"/>
Edit Del	Disability Insurance	Disability_Insurance__c	Checkbox			Suraj Tripathi, 8/22/2019 3:17 AM	<input type="checkbox"/>
Edit Del	Disability Monthly Premium	Disability_Monthly_Premium__c	Currency(16, 2)			Sara Forbes, 1/26/2018 10:18 AM	<input type="checkbox"/>
Edit Del Replace	Does Your Partner Support Coaching?	Does_Your_Partner_Support_Coaching__c	Picklist			Suraj Tripathi, 5/1/2021 2:11 AM	<input type="checkbox"/>
Edit Del Replace	Do You and Your Partner Share Finances?	Do_You_and_Your_Partner_Share_Finances__c	Picklist			Sara Forbes, 1/30/2018 1:11 PM	<input type="checkbox"/>
Edit Del Replace	Do You Use a Financial Advisor?	Do_You_Use_a_Financial_Advisor__c	Picklist			Sara Forbes, 1/30/2018 1:11 PM	<input type="checkbox"/>

Fig 5.2

Edit | Del
Wrapping Up
Wrapping Up
use for Wrappo module

Compact Layouts
New Compact Layout Assignment
Compact Layouts Help

Action	Label	API Name	Primary	Modified By
	System Default	SYSTEM	<input type="checkbox"/>	
Edit Del	Standard	Standard	<input checked="" type="checkbox"/>	Alanna Abramsky, 2/6/2018 10:47 AM

Search Layouts
Search Layouts Help

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Coaching Questionnaire Name		Sara Forbes, 1/24/2018 10:50 AM
Edit	Lookup Dialogs	Coaching Questionnaire Name	N/A	Sara Forbes, 1/24/2018 10:50 AM
Edit	Lookup Phone Dialogs	Coaching Questionnaire Name	N/A	Sara Forbes, 1/24/2018 10:50 AM
Edit	Coaching Questionnaires Tab	Coaching Questionnaire Name	N/A	Sara Forbes, 1/24/2018 10:50 AM
Edit	Coaching Questionnaires List View	N/A	New, Open in Quip, Accept, Change Owner, Import, Change Owner, Printable View, Get Alerts	Sara Forbes, 1/24/2018 10:50 AM
Edit	Search Filter Fields		N/A	Sara Forbes, 1/24/2018 10:50 AM

Buttons, Links, and Actions
New Action
New Button or Link
Buttons, Links, and Actions Help

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accept	Accept			Standard page		<input type="checkbox"/>
Edit	Clone	Clone			Standard page		<input type="checkbox"/>
Edit	Coaching Questionnaires Tab	Tab			Standard page		<input type="checkbox"/>
Edit	Delete	Delete			Standard page		<input type="checkbox"/>
Edit	Edit	Edit			Standard page		<input type="checkbox"/>
Edit	List	List			Standard page		<input type="checkbox"/>
Edit	New	New			Standard page		<input type="checkbox"/>
Edit	View	View			Standard page		<input type="checkbox"/>

Record Types
New Page Layout Assignment
Record Types Help

Fig 5.3

Label	Label	Label	Label
Edit Coaching Questionnaires Tab	Tab	Standard page	
Edit Delete	Delete	Standard page	
Edit Edit	Edit	Standard page	
Edit List	List	Standard page	
Edit New	New	Standard page	
Edit View	View	Standard page	

Record Types
[New](#)
[Page Layout Assignment](#)
[Record Types Help](#)

Action	Record Type Label	Description	Active	Modified By
Edit Del	Incoming		✓	Sura Topatto 6/1/2021 2:11 AM
Edit Del	Outgoing		✓	Sura Topatto 6/1/2021 2:11 AM

Object Limits
[Object Limits Help](#)

Item	Usage	Limit	% used	Message
Custom Fields	119	500	24%	
Custom Relationship Fields	1	40	2%	
Active Workflow Rules	0	50	0%	
Total Workflow Rules	0	500	0%	
Approval Processes	0	500	0%	
Active Lookup Filters	0	5	0%	
Active Validation Rules	0	100	0%	
VLOOKUP Functions	0	10	0%	
Sharing Rules (Both Owner- and Criteria-based)	0	300	0%	
Sharing Rules (Criteria-based Only)	0	50	0%	

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Fig 5.4

CHAPTER 6

TESTING

SalesForce testing requires the use of complex **test** methodologies as most of the features in **SalesForce** are built-in features that are customizable. When an issue is observed, the tester needs to make sure that he is **testing** the code that has been customized rather than **testing** the built-in **salesforce** functionality

SalesForce is built on a platform development language named as APEX. The language provides built-in unit test cases for developers to test their own code. The standard rule of SalesForce requires a developer to achieve 75% of code coverage with unit test cases.

From a tester's perspective, we should always aim for 100% code coverage within each test cycle.

Salesforce Testing Process

The salesforce testing process would be the same as that of testing a normal web-based application. However, a tester needs to have a clear perspective of the customizable features that are being built so that during the testing process, a tester can focus on those features alone rather than the built-in Salesforce features.

Testing of Salesforce applications requires a production like an environment called **SandBox**. Developers and testers need to use the Sandbox environment for each of their purposes.

Once the code is deployed in a Sandbox environment and approved to be ready for release, the code would be moved into production from the Sandbox environment. It is assumed that the tester has the basic knowledge of all the terms used in Salesforce before proceeding with testing.

Salesforce Testing Tips

Salesforce testing must include the following features:

- Testing must include UI testing, functional testing, regression testing, integration testing, system testing and system integration testing.
- Automation testing can also be enforced on SalesForce using tools like HP Unified Functional Testing (UFT) and Selenium.
- A tester needs to be cautious during UI testing as most of the web pages on the Salesforce platform are Visual Force pages. The dynamic nature of visual force pages need to be paid special attention as all the elements of a webpage may not be loaded at one go.
- Testers need to create functional flows including positive and negative flows to cover the entire functionality of an application.
- Workflows using various user roles must be constructed and tested.
- Test cases need to be documented using a test management tool like HP ALM.
- Test Data needs to be prepared for validating the reports functionality.

Roles and Responsibilities of a Salesforce Tester

Testers involved in Salesforce are often referred to as **‘Quality Engineers’** as opposed to **‘Quality Assurance’** people as Salesforce testing requires the testers to build complex test frameworks, understanding the functionality of an application in depth and the ability to work with the developers and project stakeholders.

Please note that some of the default functionalities provided by Salesforce cannot be removed, although your organization may not use them. Testers need to ignore the default functionality and focus on the customized functionality built by the organization.

Given below are some of the major roles and responsibilities of a Salesforce tester.

- A tester needs to have clear communication with the development team, to understand the customizable features that are being built into Salesforce.
- The tester needs to coordinate with the business whenever required as the requirement document for Salesforce is usually complex to understand and requires a lot of effort to be understandable by the testers.
- The tester needs to make sure that the code coverage does not go below 75% as per the standard Salesforce rule.
- The tester needs to conduct role-based testing to ensure the consistency of data with various user roles.
- The tester needs to perform compatibility testing of the third-party applications integrated with Salesforce if any.
- A tester needs to be familiar with load testing tools such as JMeter to validate the complex flows that produce inconsistent results in Salesforce.
- A tester needs to be familiar with multiple application flows.

6.1 Salesforce Exploratory Testing

Exploratory Testing in Salesforce would involve the following best practices:

- Testing should involve validating the consistency of data across multiple screens.
- UI Testing must involve documented test cases as per the requirement document.
- Testing should involve negative test flows, such as deleting the default data generated and validating the behaviour of an application.
- Testing should involve user input validation on the form fields.
- Cross browser compatibility testing needs to be performed to ensure if the rendering of data is correct across multiple browsers.
- Testing must include Maximum length validation for each of the editable input fields along with the invalid data validation.
- Testing must also include error message validation when invalid data is passed onto the applications.
- Amount field validation on banking applications using Boundary Value Analysis technique needs to be performed with proper diligence.
- Reports and dashboard testing need to be paid special attention to various test data parameters.
- Testing should include the entire application flow, along with individual functional flows.
- Multiple permutations and combinations of functional flows can be tested for positive and negative testing.
- API testing for integrated third-party applications needs to be performed.
- Identify the default Salesforce functionalities that come in the way of customized features and coordinate with the developers.

6.2 Salesforce Test Automation

Automated functional testing of Salesforce is a challenging one as most of the web pages are dynamic in nature on the Salesforce platform. Hence, Salesforce demands automation testers to build robust automation framework to sustain in the future. Also, there can be frequent updates to the applications as they are on cloud applications.

Test Automation on Salesforce can be achieved using any of the following tools:

- Selenium web driver
- HP Unified Functional Testing (UFT)
- Test Frameworks, such as Cucumber
- Provar

6.3 Salesforce Load Testing

Load testing involves testing the behavior of an application under varying loads. Salesforce.com is a highly scalable platform built for handling a large number of users. Salesforce.com is tested by the platform developers themselves for performance bottlenecks.

However, load testing becomes essential when a newly introduced piece of code yields performance bottlenecks that have to be addressed. Load Testing on Salesforce platform can be performed using performance testing tools such as HP LoadRunner and Apache JMeter.

6.4 Salesforce Security Testing

Security testing on the Salesforce platform is usually done by Salesforce development team. Before placing a request for a security test, it is best to review the 'Application and Network Vulnerability Assessment Summaries' provided by Salesforce.

After reviewing the summary, if a security test is still required, then a Security Assessment Test can be scheduled with the Salesforce team.

CHAPTER 7

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The following references have been used by me, during all the phases of the project:

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