Salesforce Project

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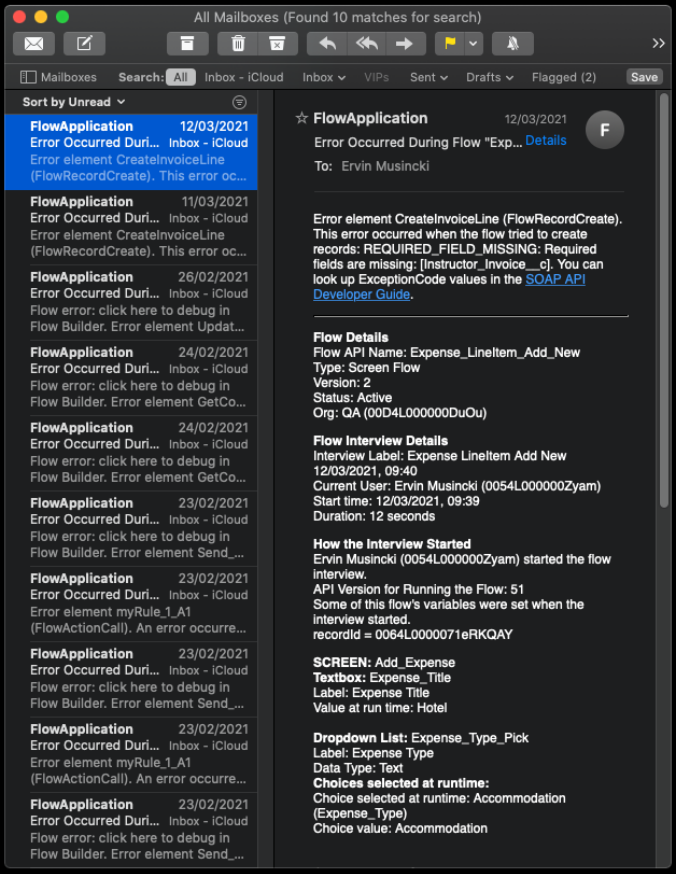
21JanSoftware1

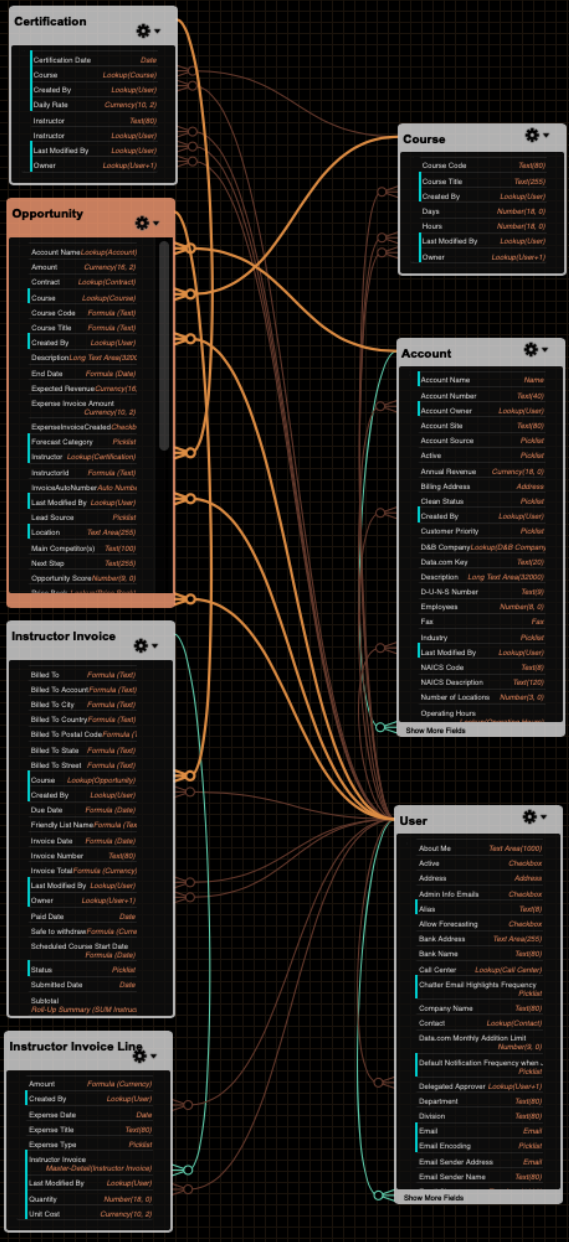
My approach

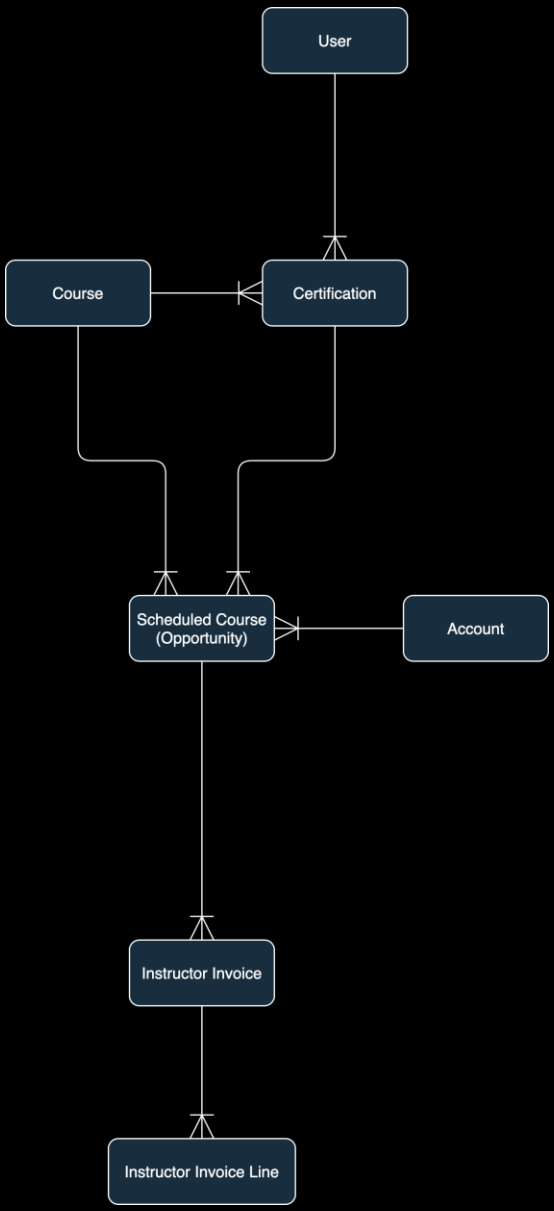
- Experimented a lot
- Made many mistakes
- Learned from my mistakes
- Experienced limitations
- Never considered the project to be live or for production

Yet to hit a govenor limit, must remmedy that soon

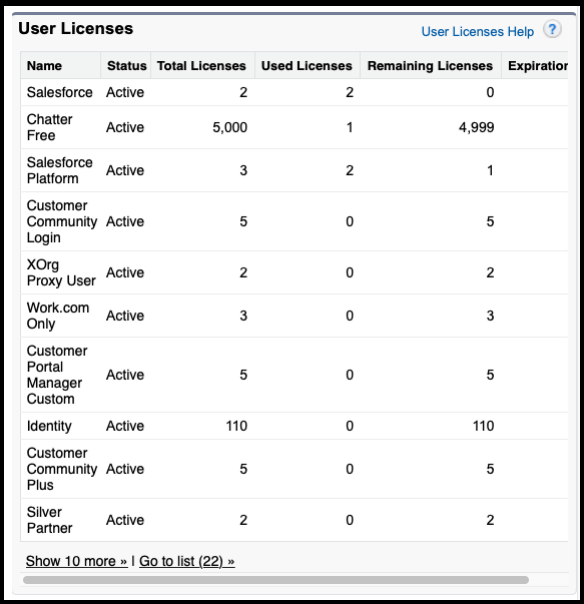
Many flow error emails received




Certification
Certification Date Date
Course Lookup(Course)
Created By Lookup(User)
Daily Rate Currency(10, 2)
Instructor Text(80)
Instructor Lookup(User)
Last Modified By Lookup(User)
Owner Lookup(User+1)
Opportunity
Account Name Lookup(Account)
Amount Currency(16, 2)
Contract Lookup(Contract)
Course Lookup(Course)
Course Code Formula (Text)
Course Title Formula (Text)
Created By Lookup(User)
Description Long Text Area(320
End Date Formula (Date)
Expected Revenue Currency(16,
Expense Invoice Amount Currency(10, 2)
ExpenseInvoiceCreated Checkb
Forecast Category Picklist
Instructor Lookup(Certification)
InstructorId Formula (Text)
InvoiceAutoNumber Auto Numb
Last Modified By Lookup(User)
Lead Source Picklist
Location Text Area(255)
Main Competitor(s) Text(100)
Next Step Text(255)
Opportunity Score Number(3, 0)
Instructor Invoice
Billed To Formula (Text)
Billed To Account Formula (Text)
Billed To City Formula (Text)
Billed To Country Formula (Text)
Billed To Postal Code Formula (
Billed To State Formula (Text)
Billed To Street Formula (Text)
Course Lookup(Opportunity)
Created By Lookup(User)
Due Date Formula (Date)
Friendly List Name Formula (Tex
Invoice Date Formula (Date)
Invoice Number Text(80)
Invoice Total Formula (Currency)
Last Modified By Lookup(User)
Owner Lookup(User+1)
Paid Date Date
Safe to withdraw Formula (Curre
Scheduled Course Start Date Formula (Date)
Status Picklist
Submitted Date Date
Subtotal Roll-Up Summary (SUM Instruc
Instructor Invoice Line
Amount Formula (Currency)
Created By Lookup(User)
Expense Date Date
Expense Title Text(80)
Expense Type Picklist
Instructor Invoice Master-Detail(Instructor Invoice)
Last Modified By Lookup(User)
Quantity Number(16, 0)
Unit Cost Currency(10, 2)
Course
Course Code Text(80)
Course Title Text(255)
Created By Lookup(User)
Days Number(18, 0)
Hours Number(18, 0)
Last Modified By Lookup(User)
Owner Lookup(User+1)
Account
Account Name Name
Account Number Text(40)
Account Owner Lookup(User)
Account Site Text(80)
Account Source Picklist
Active Picklist
Annual Revenue Currency(18, 0)
Billing Address Address
Clean Status Picklist
Created By Lookup(User)
Customer Priority Picklist
D&B Company Lookup(D&B Company
Data.com Key Text(20)
Description Long Text Area(32000)
D-U-N-S Number Text(9)
Employees Number(8, 0)
Fax Fax
Industry Picklist
Last Modified By Lookup(User)
NAICS Code Text(8)
NAICS Description Text(120)
Number of Locations Number(3, 0)
Operating Hours
Show More Fields
User
About Me Text Area(1000)
Active Checkbox
Address Address
Admin Info Emails Checkbox
Alias Text(8)
Allow Forecasting Checkbox
Bank Address Text Area(255)
Bank Name Text(80)
Call Center Lookup(Call Center)
Chatter Email Highlights Frequency Picklist
Company Name Text(80)
Contact Lookup(Contact)
Data.com Monthly Addition Limit Number(8, 0)
Default Notification Frequency when ... Picklist
Delegated Approver Lookup(User+1)
Department Text(80)
Division Text(80)
Email Email
Email Encoding Picklist
Email Sender Address Email
Email Sender Name Text(80)
Show More Fields


User
Course
Certification
Scheduled Course (Opportunity)
Account
Instructor Invoice
Instructor Invoice Line

Rename opportunities or create new custom object



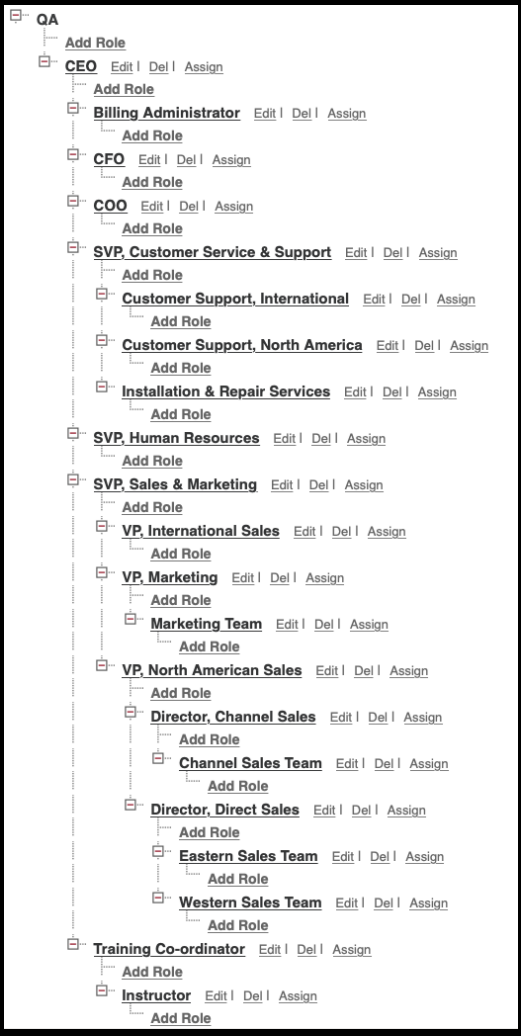
User Licenses User Licenses Help

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration
Salesforce	Active	2	2	0	
Chatter Free	Active	5,000	1	4,999	
Salesforce Platform	Active	3	2	1	
Customer Community Login	Active	5	0	5	
XOrg Proxy User	Active	2	0	2	
Work.com Only	Active	3	0	3	
Customer Portal Manager Custom	Active	5	0	5	
Identity	Active	110	0	110	
Customer Community Plus	Active	5	0	5	
Silver Partner	Active	2	0	2	

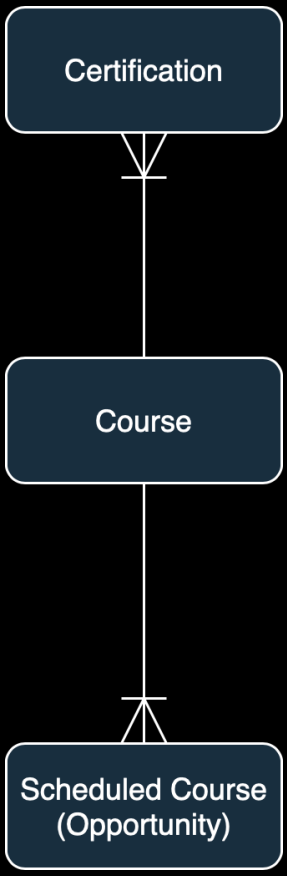
Show 10 more » | Go to list (22) »

Demo limitations with only a single spare Salesforce License available

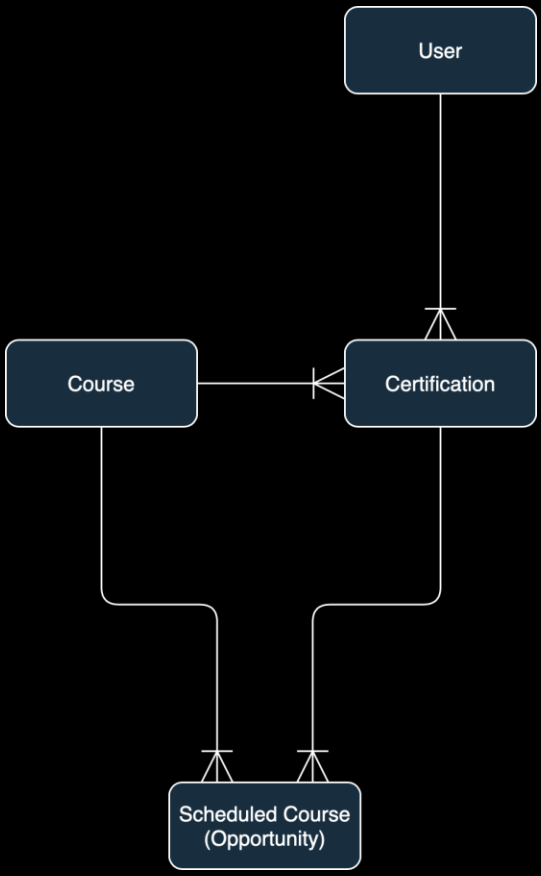
Security


QA
Add Role
CEO Edit | Del | Assign
Add Role
Billing Administrator Edit | Del | Assign
Add Role
CFO Edit | Del | Assign
Add Role
COO Edit | Del | Assign
Add Role
SVP, Customer Service & Support Edit | Del | Assign
Add Role
Customer Support, International Edit | Del | Assign
Add Role
Customer Support, North America Edit | Del | Assign
Add Role
Installation & Repair Services Edit | Del | Assign
Add Role
SVP, Human Resources Edit | Del | Assign
Add Role
SVP, Sales & Marketing Edit | Del | Assign
Add Role
VP, International Sales Edit | Del | Assign
Add Role
VP, Marketing Edit | Del | Assign
Add Role
Marketing Team Edit | Del | Assign
Add Role
VP, North American Sales Edit | Del | Assign
Add Role
Director, Channel Sales Edit | Del | Assign
Add Role
Channel Sales Team Edit | Del | Assign
Add Role
Director, Direct Sales Edit | Del | Assign
Add Role
Eastern Sales Team Edit | Del | Assign
Add Role
Western Sales Team Edit | Del | Assign
Add Role
Training Co-ordinator Edit | Del | Assign
Add Role
Instructor Edit | Del | Assign
Add Role

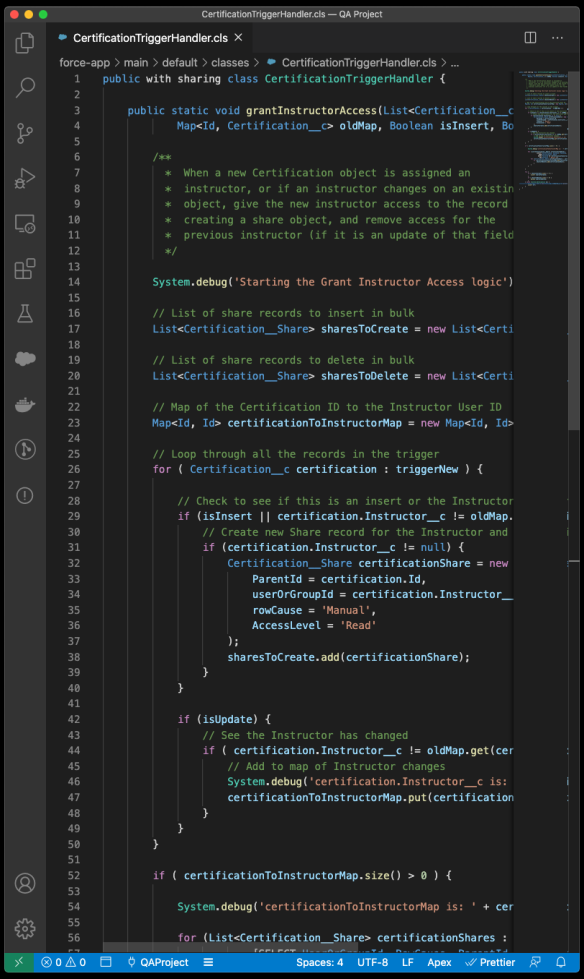
Courses



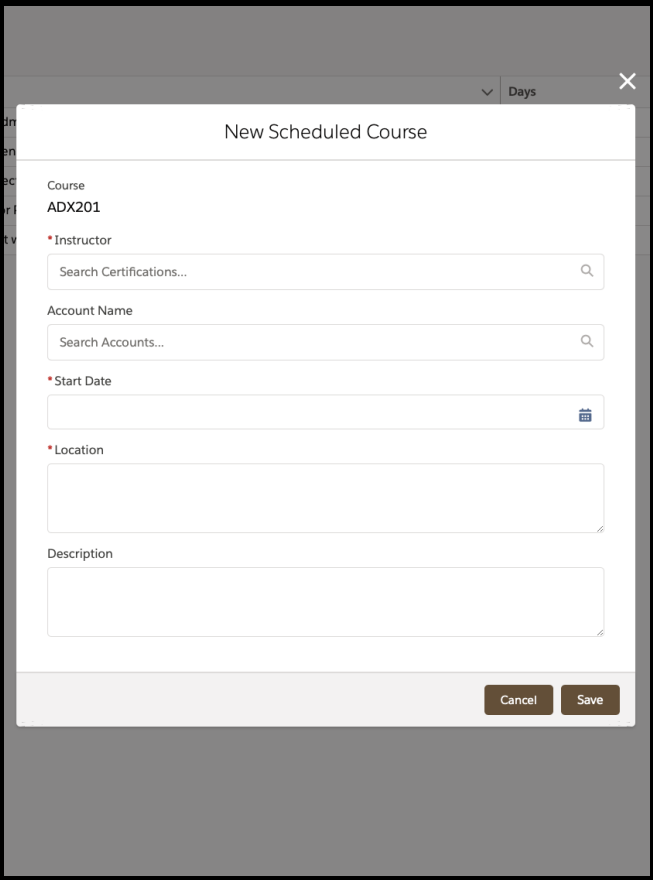
Creating a certification



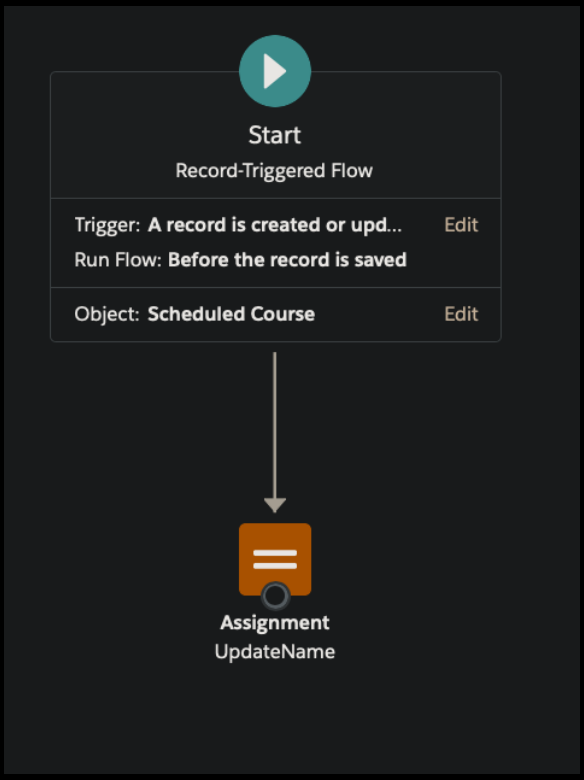
Certification access



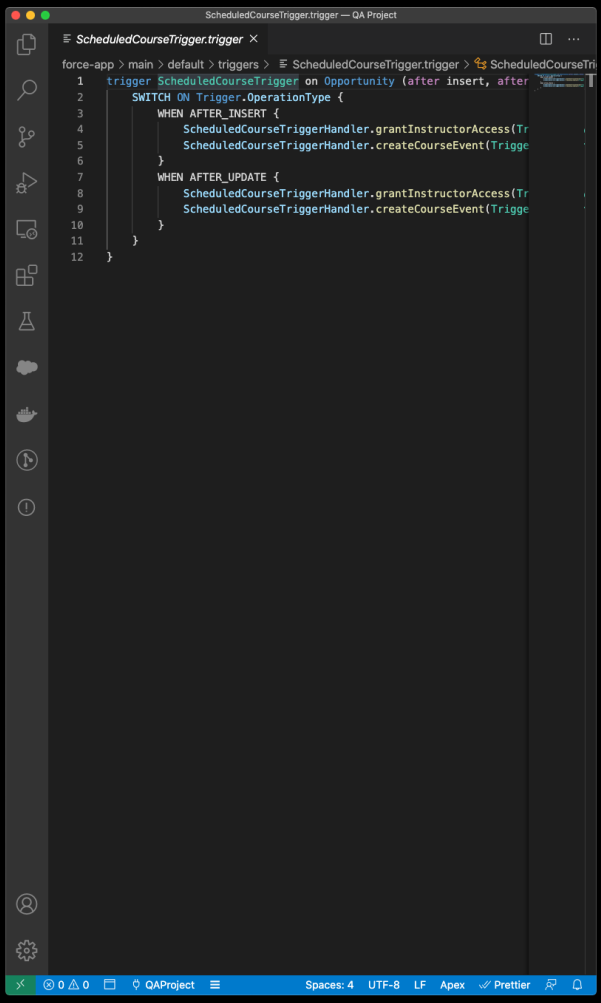
Scheduling a course



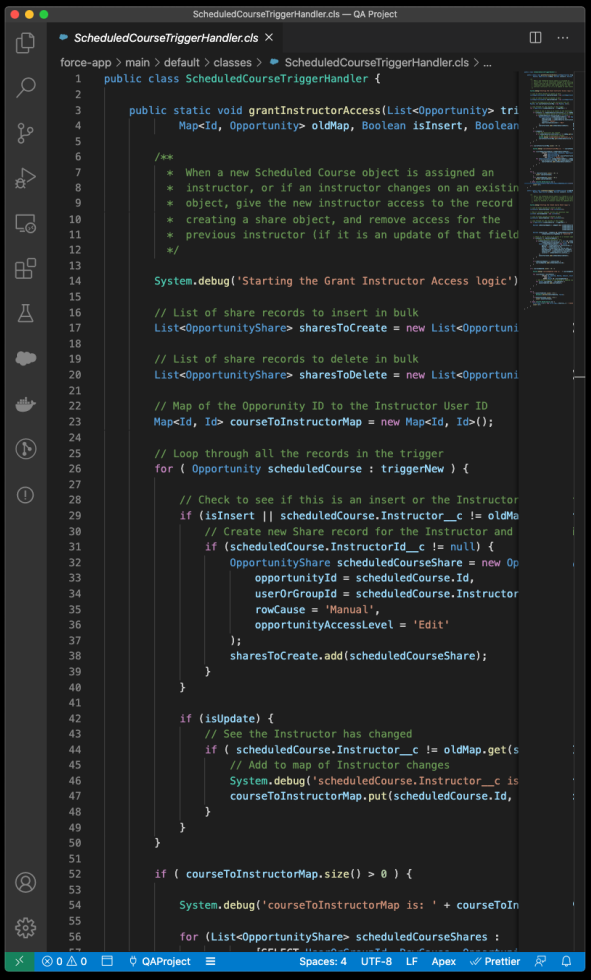
A few things happen automaticaly after scheduling



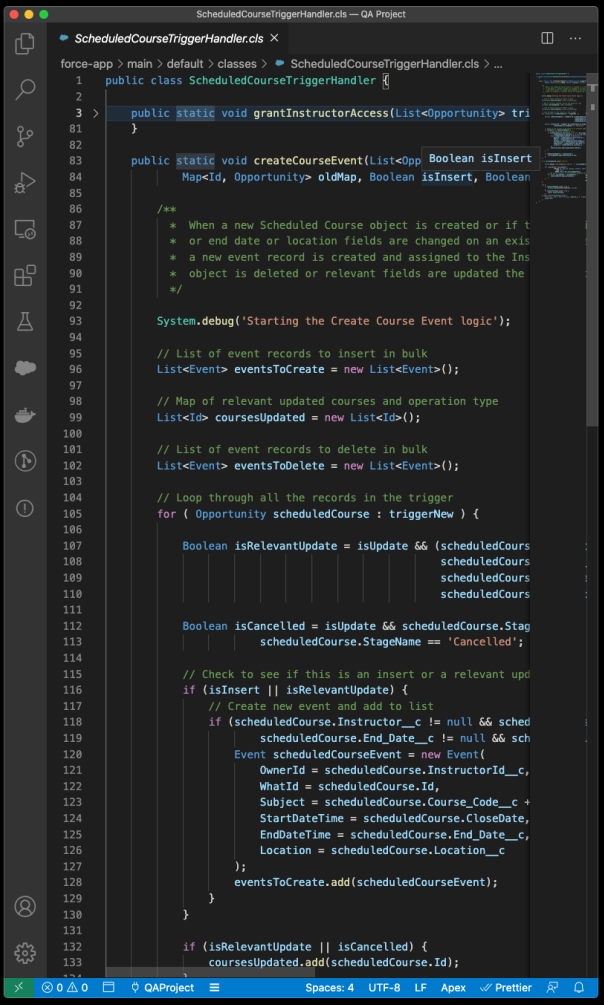
Apex triggers



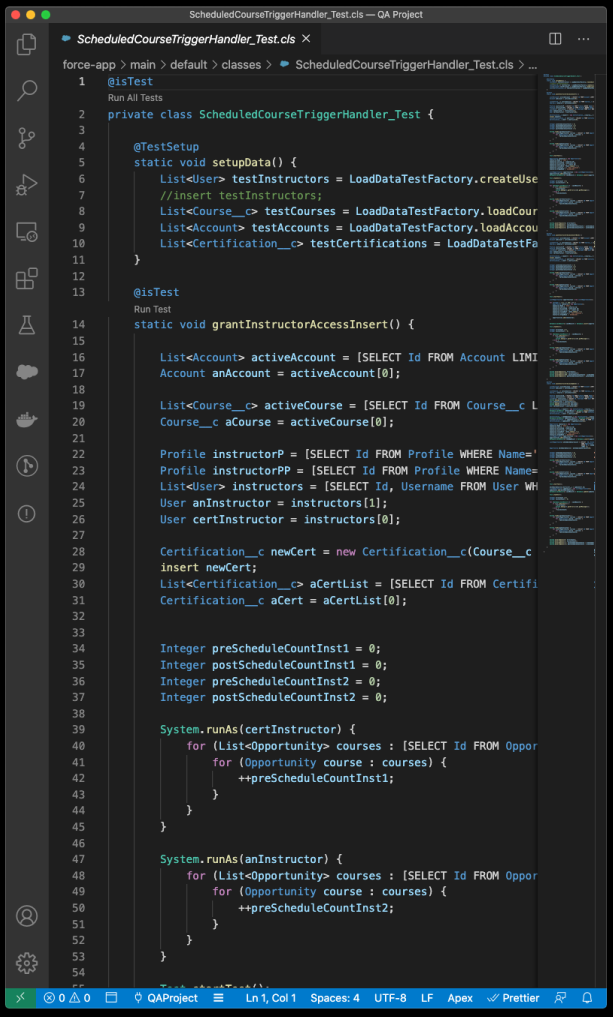
Scheduled Course access



Calendar event



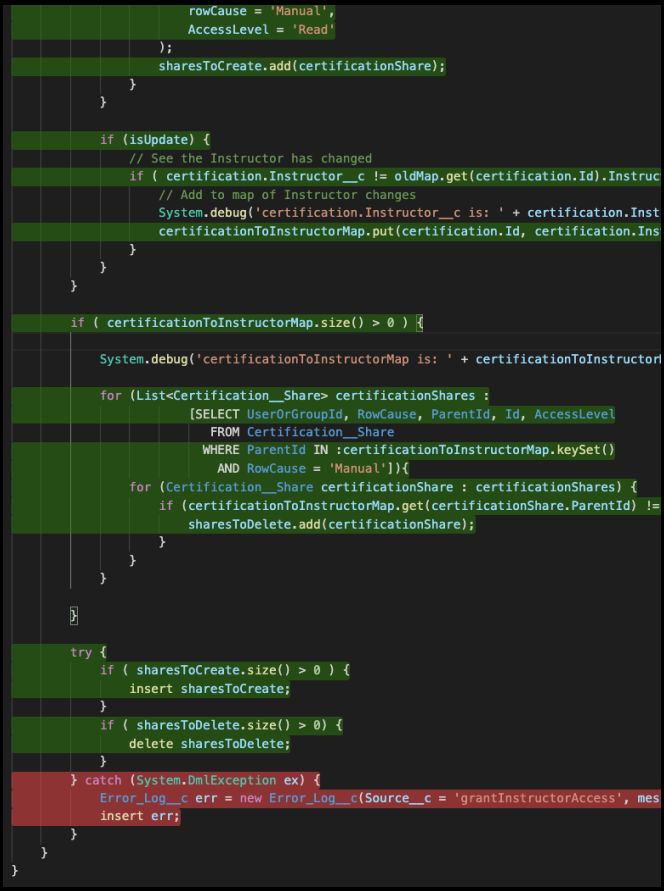
Apex testing



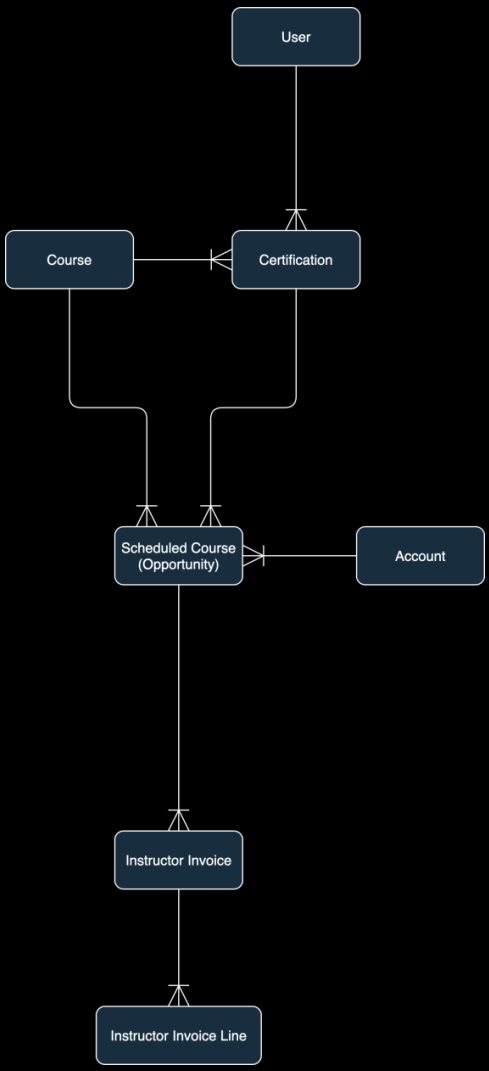
Still needs work

```
=== Test Summary
NAME                 VALUE
___________________  ____________________________
Outcome              Passed
Tests Ran            6
Pass Rate            100%
Fail Rate            0%
Skip Rate            0%
Test Run Id          7074L00000Q7B5
Test Execution Time  11923 ms
Org Id               00D4L000000DuOuUAK
Username             ergo96@icloud.com.project
Org Wide Coverage    86%


=== Apex Code Coverage for Test Run 7074L00000Q7B5
TEST NAME                                                                  CLASS BEI
_________________________________________________________________________  _________

ScheduledCourseTriggerHandler_Test.grantInstructorAccessInsert             Scheduled
ScheduledCourseTriggerHandler_Test.grantInstructorAccessInsert             LoadDataT
ScheduledCourseTriggerHandler_Test.grantInstructorAccessInsert             Certifica
ScheduledCourseTriggerHandler_Test.grantInstructorAccessInsert             Scheduled
ScheduledCourseTriggerHandler_Test.grantInstructorAccessInsert             Certifica
ScheduledCourseTriggerHandler_Test.grantInstructorAccessInsertBulk         Certifica
ScheduledCourseTriggerHandler_Test.grantInstructorAccessInsertBulk         Scheduled
ScheduledCourseTriggerHandler_Test.grantInstructorAccessInsertBulk         Scheduled
ScheduledCourseTriggerHandler_Test.grantInstructorAccessInsertBulk         Certifica
ScheduledCourseTriggerHandler_Test.grantInstructorAccessInsertBulk         LoadDataT
ScheduledCourseTriggerHandler_Test.grantInstructorAccessUpdate             Scheduled
ScheduledCourseTriggerHandler_Test.grantInstructorAccessUpdate             LoadDataT
ScheduledCourseTriggerHandler_Test.grantInstructorAccessUpdate             Certifica
ScheduledCourseTriggerHandler_Test.grantInstructorAccessUpdate             Certifica
ScheduledCourseTriggerHandler_Test.grantInstructorAccessUpdate             Scheduled
CertificationTriggerHnadler_Test.insertCertification                       Certifica
CertificationTriggerHnadler_Test.insertCertification                       LoadDataT
CertificationTriggerHnadler_Test.insertCertification                       Certifica
CertificationTriggerHnadler_Test.insertCertificationBulk                   Certifica
CertificationTriggerHnadler_Test.insertCertificationBulk                   LoadDataT
CertificationTriggerHnadler_Test.insertCertificationBulk                   Certifica
CertificationTriggerHnadler_Test.updateCertification                       Certifica
CertificationTriggerHnadler_Test.updateCertification                       LoadDataT
CertificationTriggerHnadler_Test.updateCertification                       Certifica


=== Apex Code Coverage by Class
CLASSES                        PERCENT  UNCOVERED LINES
_____________________________  _______  ___________________
ScheduledCourseTrigger         100%
ScheduledCourseTriggerHandler  86%      77,78,79,108,109...
LoadDataTestFactory            100%
CertificationTrigger           100%
CertificationTriggerHandler    91%      77,78,79

08:03:38.453 ended SFDX: Run Apex Tests
```

More than 5% of lines are catch blocks



Invoices


User
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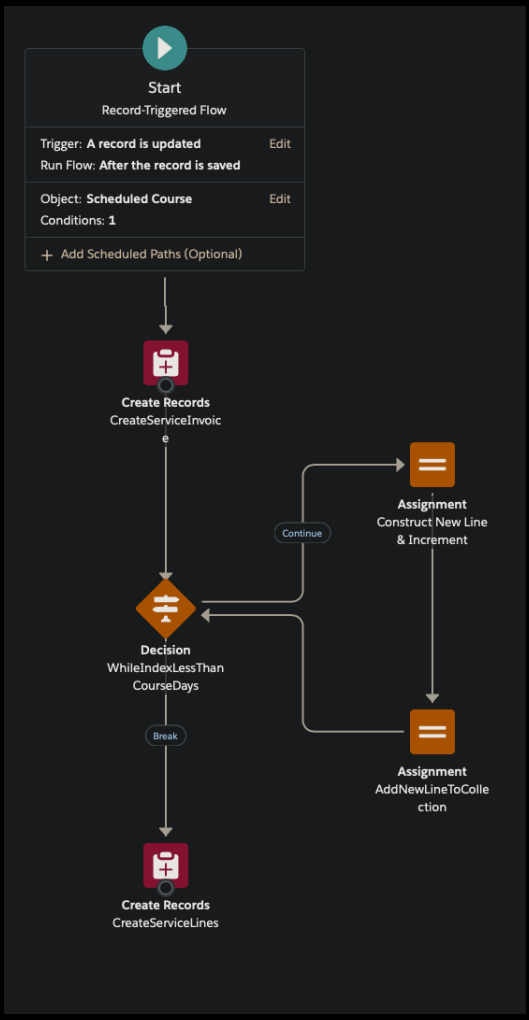
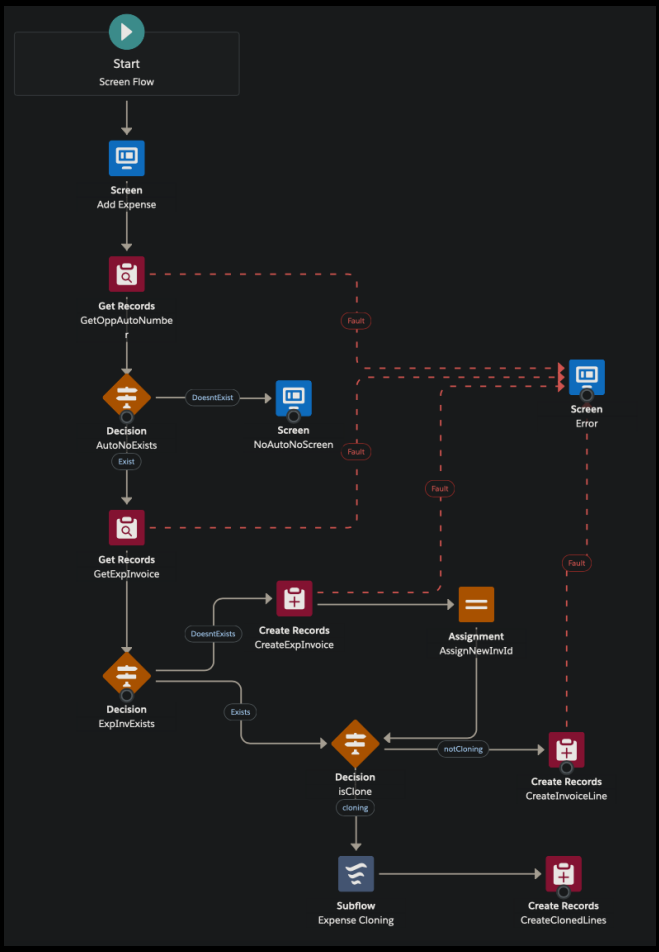
Instructor Invoice
Instructor Invoice Line

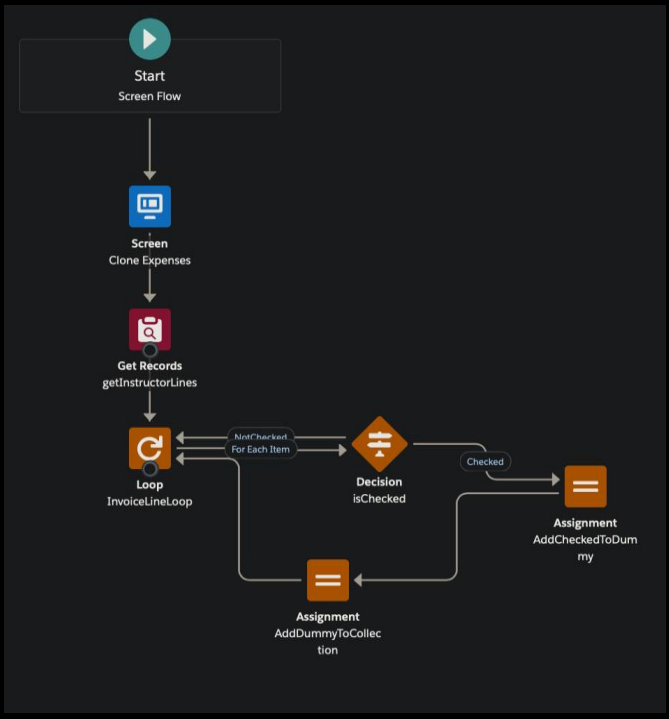
Automaticaly creating Service Invoices



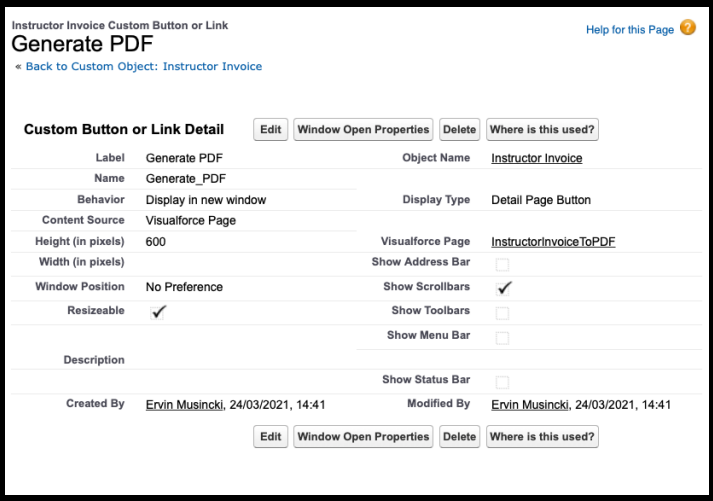
Expence Invoice Screen Flow



Cloning Subflow



Generate PDF



Instructor Invoice Custom Button or Link

Generate PDF

Help for this Page

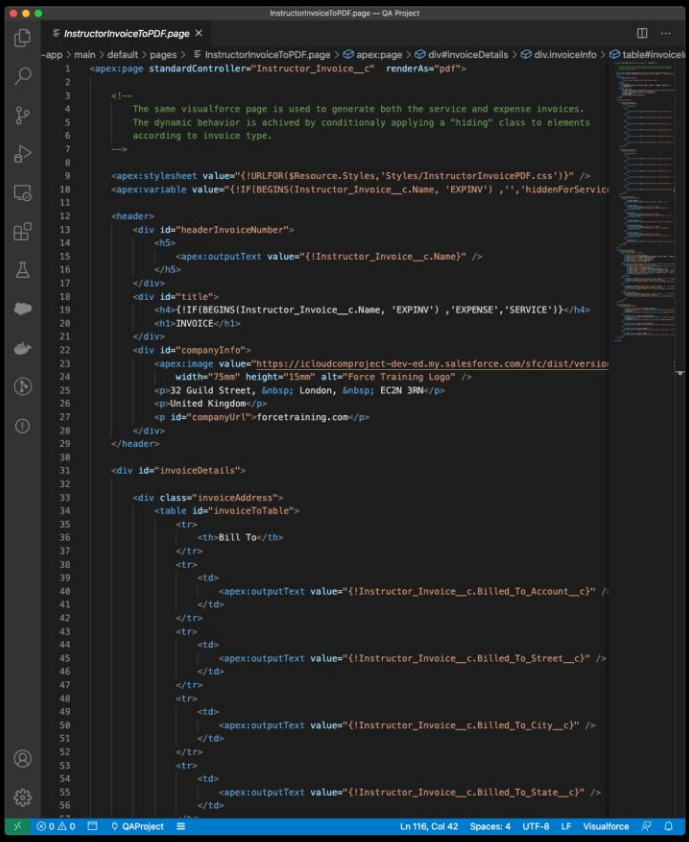
« Back to Custom Object: Instructor Invoice

Custom Button or Link Detail Edit | Window Open Properties | Delete | Where is this used?

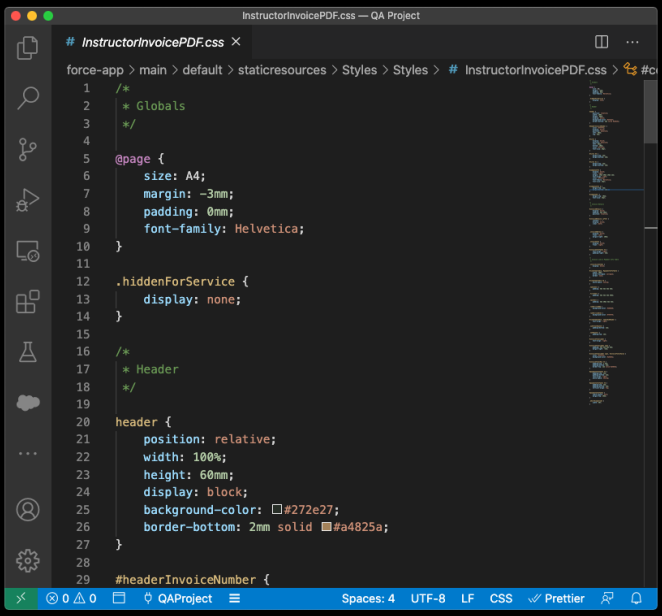
Label	Generate PDF	Object Name	Instructor Invoice
Name	Generate_PDF		
Behavior	Display in new window	Display Type	Detail Page Button
Content Source	Visualforce Page		
Height (in pixels)	600	Visualforce Page	InstructorInvoiceToPDF
Width (in pixels)		Show Address Bar	☐
Window Position	No Preference	Show Scrollbars	✓
Resizeable	✓	Show Toolbars	☐
		Show Menu Bar	☐
Description			
		Show Status Bar	☐
Created By	Ervin Musincki, 24/03/2021, 14:41	Modified By	Ervin Musincki, 24/03/2021, 14:41

Edit | Window Open Properties | Delete | Where is this used?

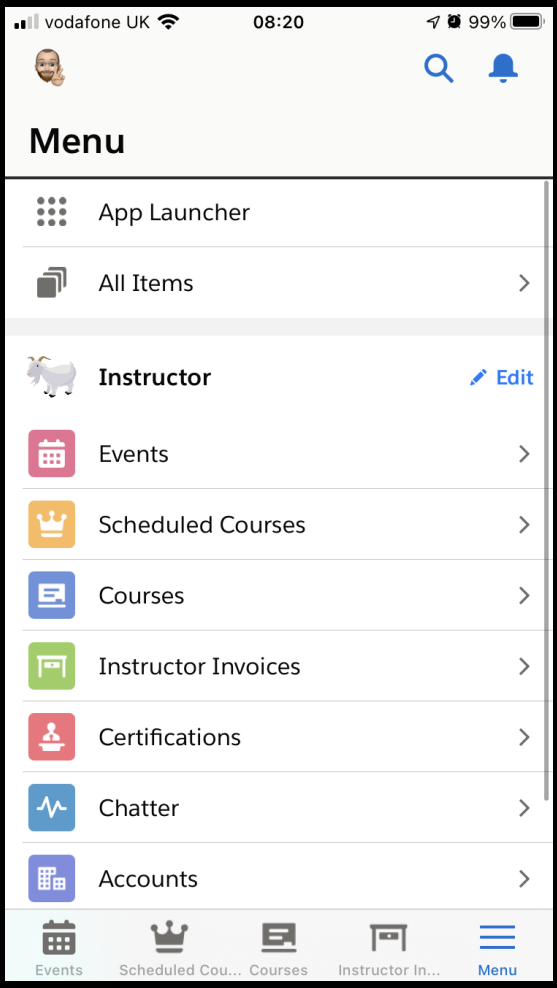
Dynamicaly adjusts to Invoice Type



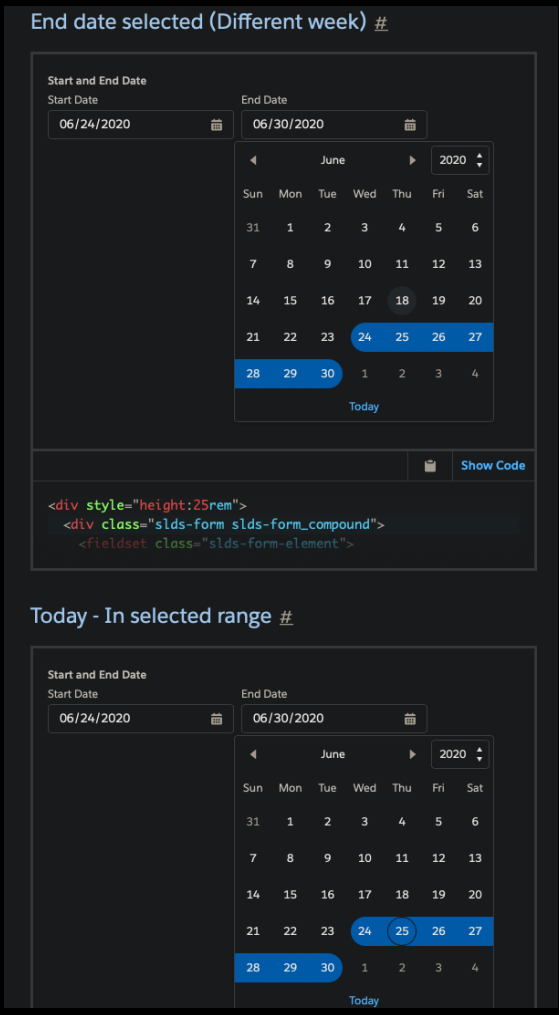
Styles can be made more dinamic with more input



Also works on mobile



Many ways to inprove and extend functionality



Any Questions?

Thank you for listening

ForceTraining