



Salesforce Project Ready
Entry Level Training & Professional Development
Program

Project Title : Online Training Management

Day 1 :

Topic : Brief explanation of Salesforce and CRM, Comparison of Excel data and Salesforce

Milestone / Activities: Difference between Standard Objects and Custom Objects

Detailed Description : Salesforce is a Cloud based software company, that gives platform to businesses to relate their Marketing, IT, Sales, Commerce, and Services to their customers. Salesforce has web based Software. Salesforce Integrated into many catagories to improve their business. Now a days salesforce is using on Facebook, LinkedIn, youtube etc.



It is a No 1 CRM platform, i.e, Customer Relationship Management which makes direct interaction between customer and business by apps. Here customers can make direct marketing by given platform and also track customers marketing strategy.

Application: In salesforce we can create number of application by using many platform like Lightning Components, Apex, VisualForce. By comparing this to Excel we say that application is workbook.

Object : It organises the data in application. Salesforce already given database that includes few Objects and fields that helps customers/clients to run better those objects are called Standard Objects, and which we create by requirements are called Custom Objects.

Salesforce Developer Edition can be created by two ways

They are:

- i) Trailhead
- ii) salesforce web site

Milestone Activities Screenshot:

Login to the salesforce

The screenshot shows a web browser window with the address bar displaying `creative-raccoon-juvjnf-dev-ed.lightning.force.com/lightning/n/trlhdtips_Welcome`. The browser's address bar includes navigation buttons (back, forward, refresh) and a search bar. Below the address bar, there are links for Apps, Bookmarks, Gmail, YouTube, and Maps. The main content area features the Trailhead logo and a navigation bar with links: Playground Starter, Welcome (active), Install a Package, and Get Your Login Credentials. The page has a blue header with a cartoon raccoon character sitting on a laptop. Below the header, the text "WELCOME, KADAPA" is displayed in large, bold, blue letters. Underneath, a paragraph reads: "This is your Trailhead Playground, where you can complete hands-on challenges for Trailhead, and try out new Salesforce features and customizations." Below this, a link says: "Just getting started? Watch this quick video to learn tips for success." At the bottom, there is a video player with a blue background and a cartoon bear character. The video title is "Getting Started with Trailhead".

creative-raccoon-juvjnf-dev-ed.lightning.force.com/lightning/n/trlhdtips_Welcome

Apps Bookmarks Gmail YouTube Maps Other bookmarks Reading list

TRAILHEAD

All Search...

Playground Starter Welcome Install a Package Get Your Login Credentials

WELCOME, KADAPA

This is your Trailhead Playground, where you can complete hands-on challenges for Trailhead, and try out new Salesforce features and customizations.

Just getting started? Watch this quick video to learn tips for success.

Getting Started with Trailhead

Day 2 :

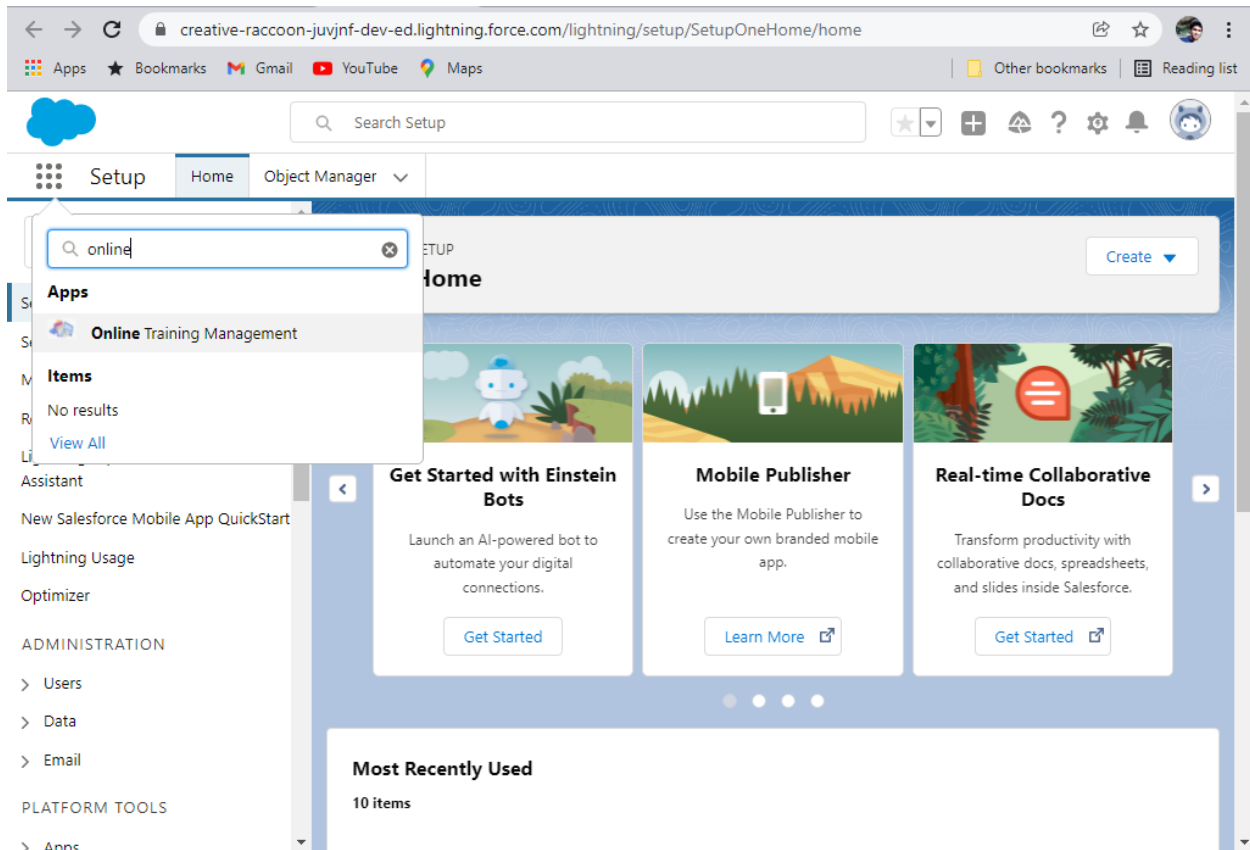
Topic : Creating Application, Objects, Fields, and Validation rules

Milestone / Activities: Created validation rules

Detailed Description: Project aim is to create App for "**Online Training Management**".

This app is created by Lightning App. In available tabs, add Home tab.

In App launcher we find our application, following is the screenshot of app



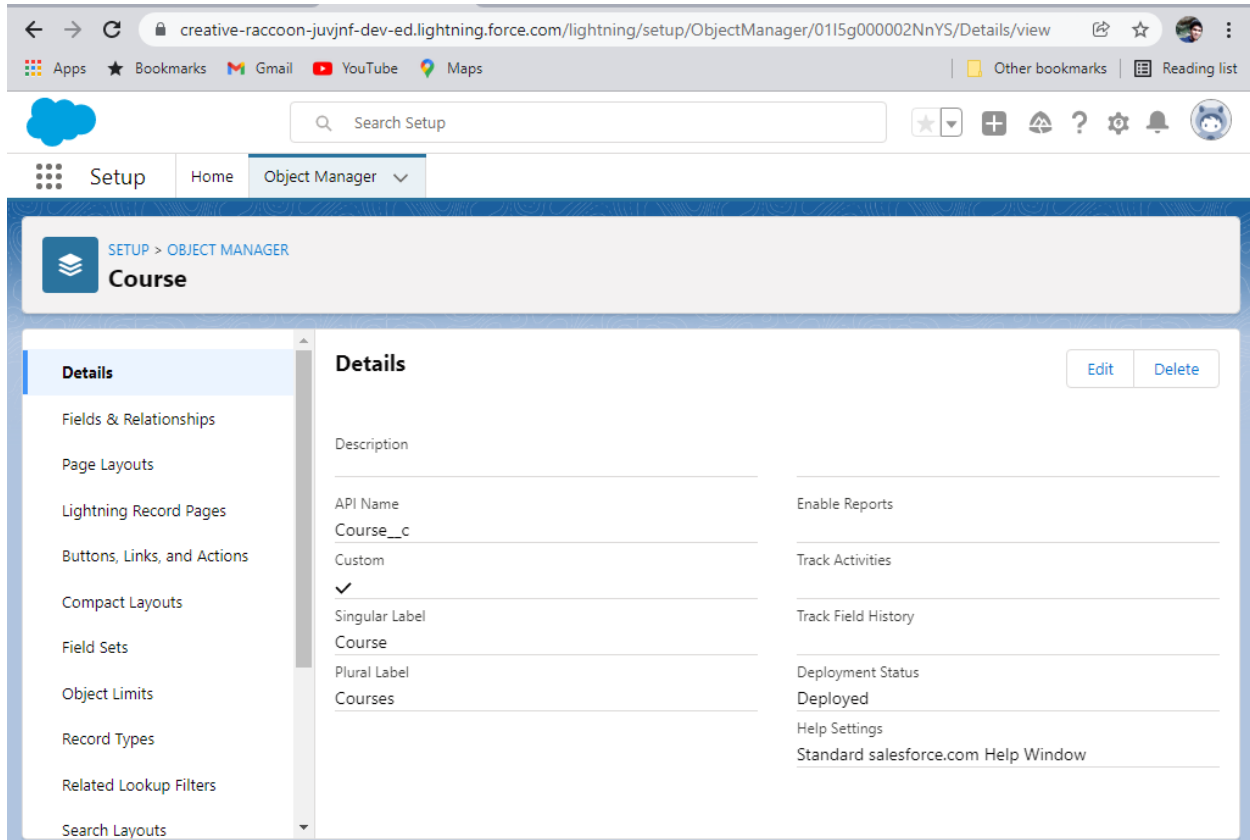
Create custom Objects either using Schema Builder or Custom Object. The following custom objects are created for the Online training Management are

i) Courses

- Rename Record Name : Course ID
- Data type : Auto Number
- Display Format : C-{000000}
- Starting Number : 1
- Deployment status : Deployed
- Allow Search : Access
- Add Notes and Attachment : Selected

- Add to Navigation Tab : Selected

Snapshot of Course Custom Object :



Custom Course Object Custom Fields are

- Course Name as label and with datatype Text.
- Course Duration(In Months) as label with datatype picklist by entering values are(1,2,3,4,5,6)
- Course Catagory as Label with picklist datatype and values are (Cloud Computing, Data Management, Cyber Security)
- Course Fee as label with Currency datatype with length(5,4).
- Course Description as label with Text datatype and length(50)

Validation Rules for Course Object is

- Course Fee should not be negative value and should be less than \$3000.

Snapshot of Course Custom Object Custom Fields:

The screenshot shows a web browser window with the URL `creative-raccoon-juvjnf-dev-ed.lightning.force.com/lightning/o/Course_c/new?count=1&nooverride=1&useRecordT...`. The browser's address bar and tabs are visible. The main content area displays the 'Information' tab for a new Course record. The form includes the following fields:

- Course ID**: A text field.
- Owner**: A dropdown menu showing 'Kadapa Charan'.
- * Course Name**: A required text field.
- * Course Duration(In Months)**: A required dropdown menu with '--None--' selected.
- * Course Catagory**: A required dropdown menu with '--None--' selected.
- * Course Fee**: A required text field.
- Course Description**: A text area.

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

ii) Trainer

- Rename Record Name : Trainer ID
- Data type : Auto Number
- Display Format : T-{000000}
- Starting Number : 1
- Deployment status : Deployed
- Allow Search : Access
- Add Notes and Attachment : Selected
- Add to Navigation Tab : Selected

Trainer Object Custom Fields are

- Full Name as label with Text datatype conatins length(25).
- Email as both label and datatype and it should not take duplicate mails.
- Mobile as label with Phone datatype with length(13).
- Whatsapp as label with Phone datatype with length(13).
- Date of Birth as label with date datatype.
- Age as label using formula as datatype and return type as Number.
- Experience as label using picklist datatype and values are(0,1,2,3,4)
- LinkedIn Profile as label using URL datatype.

- Expertise as label using text datatype.

Validation Rules for Trainer Object are

- Mobile and Whatsapp should be minimum of 10 digits and maximum of 15 digits.
- Full Name, Phone, Date of Birth cannot be empty.
- Trainer age cannot be less than 25 years.

Snapshot of Trainers Custom Object and its Fields:

The screenshot shows a web browser window with the URL `creative-raccoon-juvjnf-dev-ed.lightning.force.com/lightning/o/Trainer__c/new?count=2&nooverride=1&useRecordTy...`. The browser's address bar and tabs are visible. The main content area shows a 'New Trainer' form. The form is titled 'New Trainer' and is part of the 'Trainers' custom object. It contains several fields: Trainer ID, Owner (Kadapa Charan), Full Name, Email, Date Of Birth, Experience (dropdown), Expertise, LinkedIn, Phone, and Whatsapp Number. The form has 'Cancel', 'Save & New', and 'Save' buttons at the bottom.

iii) Students

- Rename Record Name : Student ID
- Data type : Auto Number
- Display Format : S-{000000}
- Starting Number : 1
- Deployment status : Deployed
- Allow Search : Access
- Add Notes and Attachment : Selected
- Add to Navigation Tab : Selected

Custom Fields for this Object are

- First Name as label with Text datatype conatins length(25).
- Last Name as label with Text datatype conatins length(25).

- Email as both label and datatype and it should not take duplicate mails.
- Mobile as label with Phone datatype with length(13).
- Whatsapp as label with Phone datatype with length(13).
- Date of Birth as label with date datatype.
- Enrollment Date as label using Auto Generated(date) and it should be locked/read only field.

Validation rules for Student Object are

- Mobile and Whatsapp should be minimum of 10 digits and maximum of 15 digits.
- Last Name, Phone, Date of Birth cannot be empty.
- Trainer age cannot be less than 16 years

Snapshot of Student Custom and its Fields:

The screenshot shows a web browser window with the URL `creative-raccoon-juvjnf-dev-ed.lightning.force.com/lightning/o/Student_c/new?count=3&nooverride=1&useRecord...`. The browser's address bar and tabs are visible. The main content area displays a 'New Student' form. The form has a title bar 'New Student' and a tab 'Information'. The form fields are organized into two columns. The left column contains 'Student ID', 'First Name', 'Last Name', 'Email', 'Whatsapp Number', and 'Enrollment Date'. The right column contains 'Owner' (Kadapa Charan), 'Date Of Birth', and 'Phone Number'. The 'Enrollment Date' field is marked as a date field. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The background shows a list of students with columns for 'Students' and 'Recently'.

iv) Meetings

- Rename Record Name : Meeting ID
- Data type : Auto Number
- Display Format : S-{000000}
- Starting Number : 1
- Deployment status : Deployed
- Allow Search : Access

- Add Notes and Attachment : Selected
- Add to Navigation Tab : Selected

Custom fields for this Object are

- Valid from and valid to as label using date datatype.
- Active as label with checkbox datatype to find whether the meeting is active or not.
- Meeting Url as label with URL datatype to login to the session.

Validation rules:

- Valid from date should be less than Current date.
- Valid To date should be less than valid from.

Snapshot of Meeting Custom Object and its Fields:

The screenshot displays the Salesforce Lightning interface for creating a new meeting. The browser address bar shows the URL: `creative-raccoon-juvjnf-dev-ed.lightning.force.com/lightning/o/Meeting__c/new?count=4&nooverride=1&useRecord...`. The navigation bar includes 'Online Training Ma...', 'Home', 'Courses', 'Trainers', 'Students', and 'Meetings'. The 'Meetings' tab is active, showing a list of recent meetings. A modal window titled 'New Meeting' is open, displaying the 'Information' section. The form includes the following fields:

- Meeting ID**: A text input field.
- Owner**: A dropdown menu showing 'Kadapa Charan'.
- *Valid from**: A date input field with a calendar icon.
- *Valid upto**: A date input field showing '2/4/2022' with a calendar icon.
- *Meeting Url**: A text input field.
- Active**: A checkbox that is currently unchecked.

At the bottom of the modal, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

Day 3:

Topics: Relationship fields and Validation Rules

Milestone/Activities:

Relationship Fields:

1) Lookup Relationship:

We can say this as One to many fashion. We can create upto 40 fields in an object. It is not a mandatory, if we delete parent field it does not affect to child field.

2) Master-Detail Relationship:

In this field, It allows the parent record to control child record attributes such as sharing and visibility. It is always required field. If we delete parent field automatically child field will be deleted.

iv) Batch Scheduling:

- Rename Record Name : Batch Scheduling ID
- Data type : Auto Number
- Display Format : BE-{000000}
- Starting Number : 1
- Deployment status : Deployed
- Allow Search : Access
- Add Notes and Attachment : Selected
- Add to Navigation Tab : Selected

Custom Fields for this Object are

- Batch ID as label with Autonumber datatype.
- Batch Type as label with Picklist datatype values contains Weekend/Weekday.
- Add lookup fields Course ID to Course, meeting ID to meeting, Trainer ID to Trainer.
- Add two Fields with datatype Date that Start Date and End Date.

v) Course-Trainer Object

- Rename Record Name : Course-Trainer ID
- Data type : Auto Number
- Display Format : CT-{000000}
- Starting Number : 1
- Deployment status : Deployed
- Allow Search : Access

Custom Fields for Course Trainer Object

- Add a Master-Detail Relationships for Trainer and Course with label Trainer ID and Course ID.
- Label as Course-Trainer ID by Auto Number datatype.
- Use Formula datatype to display Course Name and Trainer Name.

vi) Student Enrollment Object

- Rename Record Name : Student Enrollment ID
- Data type : Auto Number
- Display Format : SE-{000000}
- Starting Number : 1
- Deployment status : Deployed
- Allow Search : Access

Custom Fields are

- Add a Master-Detail Relationship with Batch Schedule and Student and label it as Batch ID and Student ID.
- Label as Student Enrollment ID b Auto Number datatype.
- Use formula datatype to display Student Email and Student Name.

Milestone/Activities screenshot:

