



# SALESFORCE PROJECT READY

Entry Level Training & Professional Development Program

Project Title: Online Training Management Application

## Day 1:

Topic: Introduction to Salesforce Org

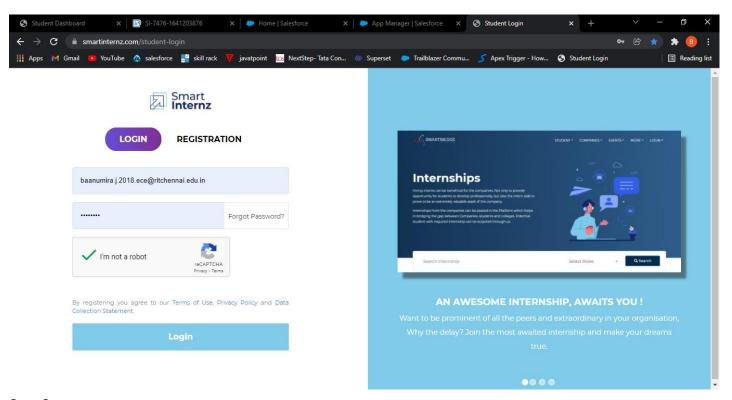
Milestone/Activites: To create a salesforce developer org and account activation

Detailed Description: We have received the SMARTINTERNZ credentials to login and access the resources for the project(Online Training Management) from the externship column. In the very first session they have delivered how to create an application using lightning app, and some glimpse of CRM and other basic terminologies of salesforce at the end of session we are instructed to follow the project detailes under the project workspace to complete the first task i.e to activate our salesforce developer org

#### Screenshots:

Step 1:

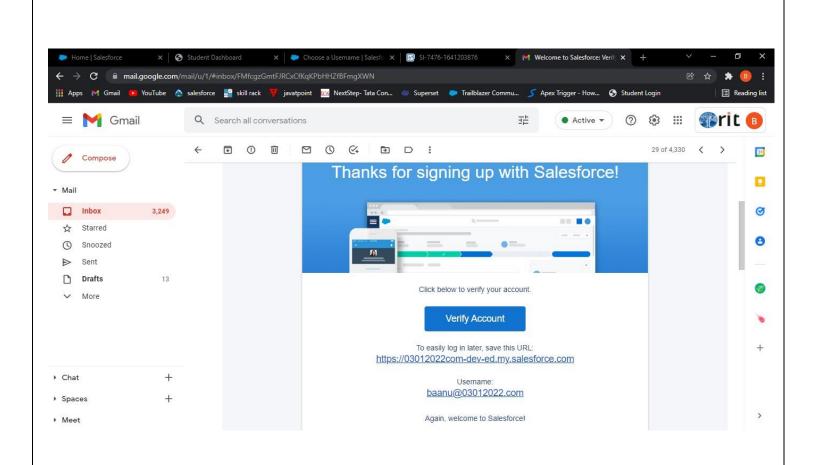
Login to the SMARTINTERNZ platform

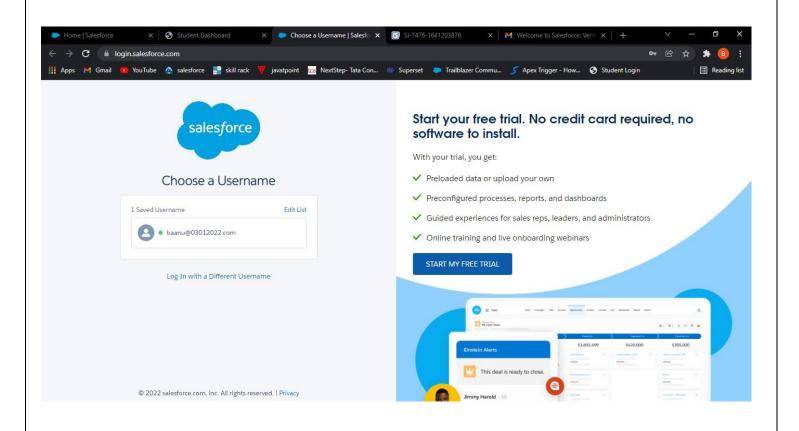


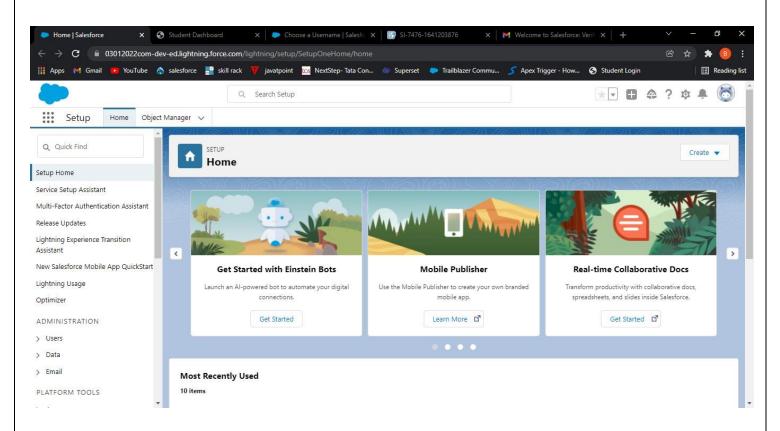
## Step 2:

Creating a developer Account by sign up and fill the required details within 5-10 minutes I got my email verification and activated my account by verify account through the mail

After verification I have logged in to my salesforce account







Day 2:

Topic: Create Custom Objects

Milestone/Activites: Creating Custom Objects and their respective Fields

Detailed Description: In the second session we learned about Objects and fields and how to create object in the salesforce org. There are 3 ways for creating objects first by using schema builder, create object directly in the object manager page or create object from spreedsheet

The task is to create an custom object for the application

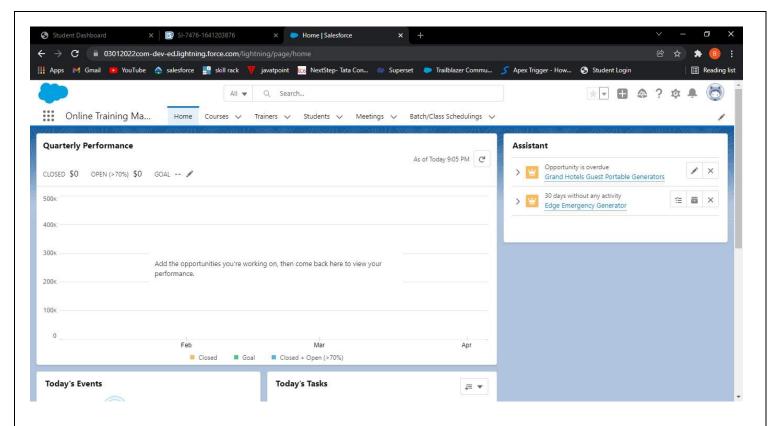
Objects > Courses, Trainer, Student, Meeting, Batch/Class Scheduling
Fields-----> Name, ID, Whatsapp Number, Phone Number, Age, DateofBirth, Experience, URL etc.. Objects in

the salesforce is represented as tabs for storing the information in the form of database Fields are the

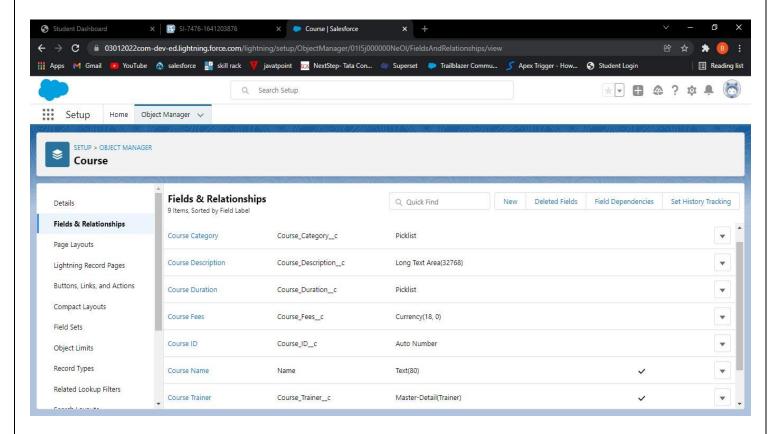
different collection of information that will be stored on the respective object

## Screenshots:

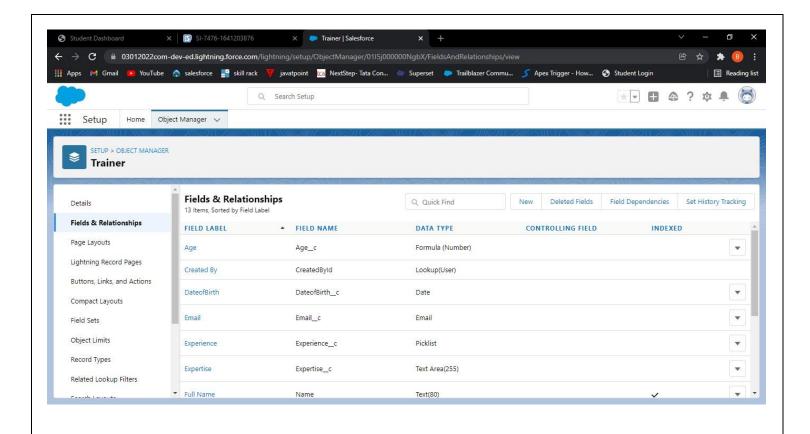
Custom Objects of online training management application

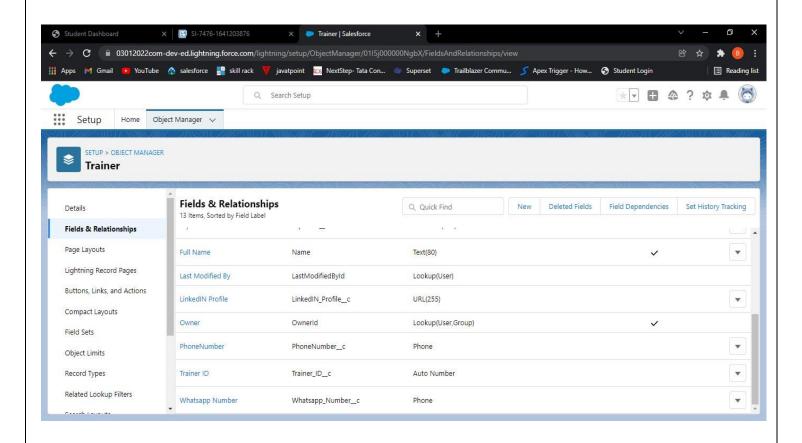


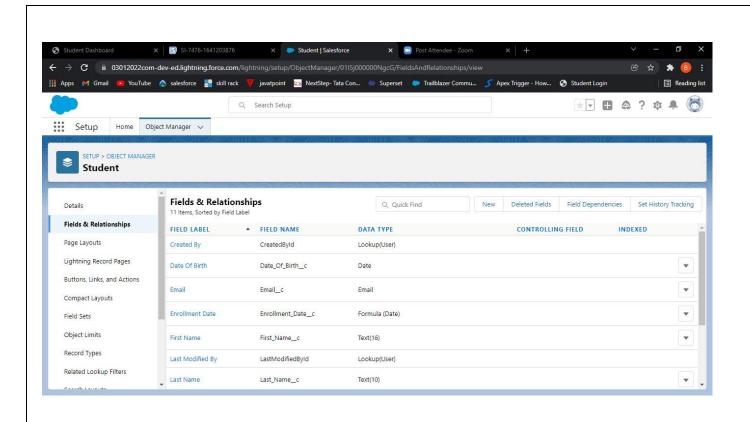
# Course Object and its field

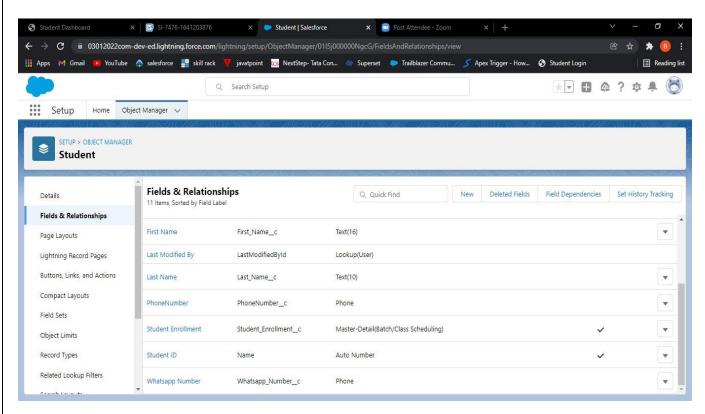


## Trainer Object and its Field

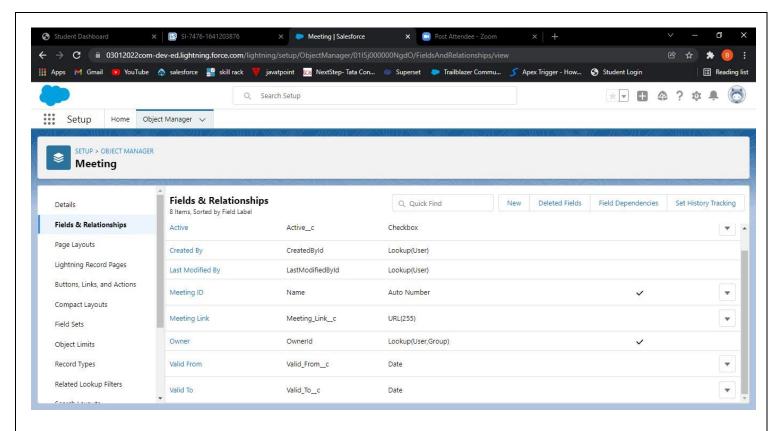




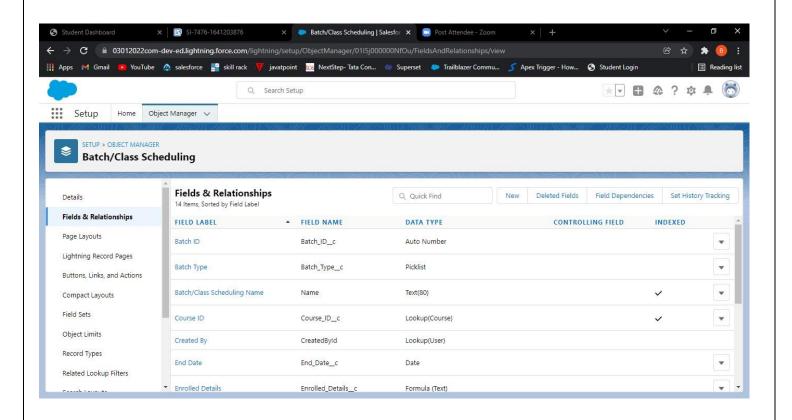


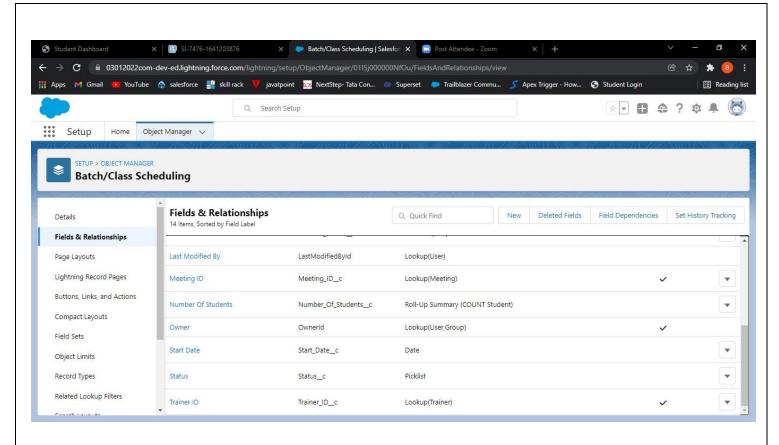


Meeting Object and its Field



## Batch/Class scheduling





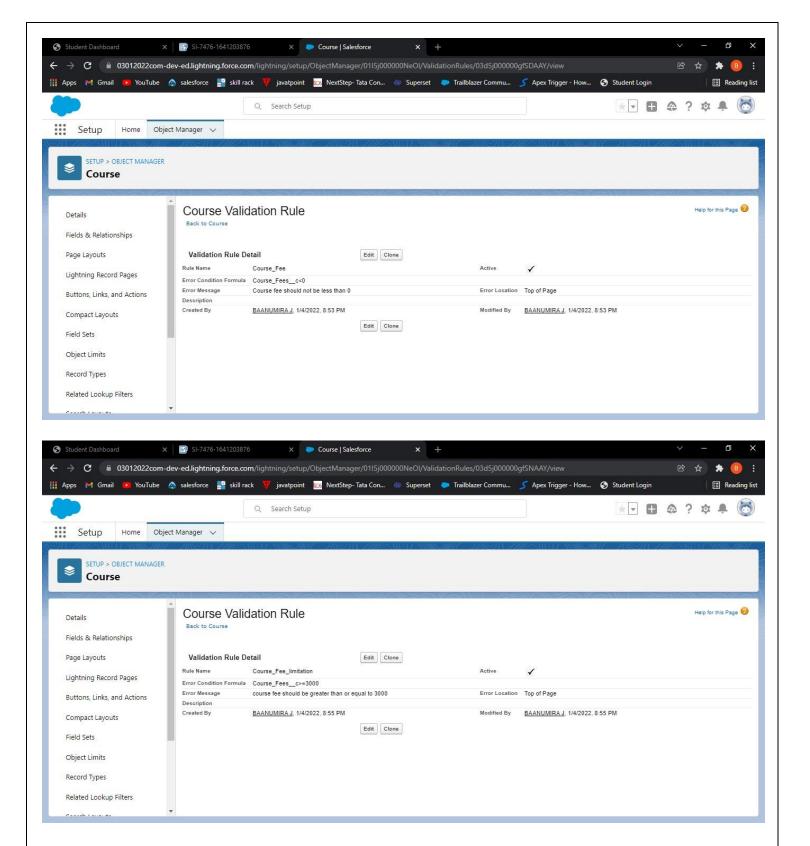
Day 3:

Topic: Validation rules and Relationships

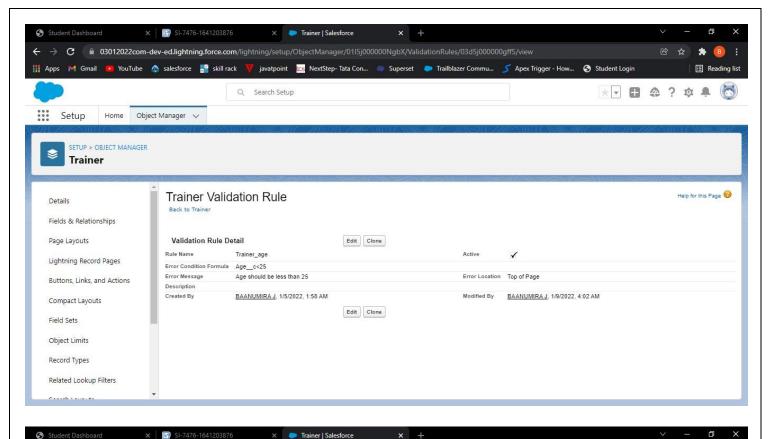
Milestone/Activites: Creating Validation rules for custom objects and Building relationships between them using schema builder

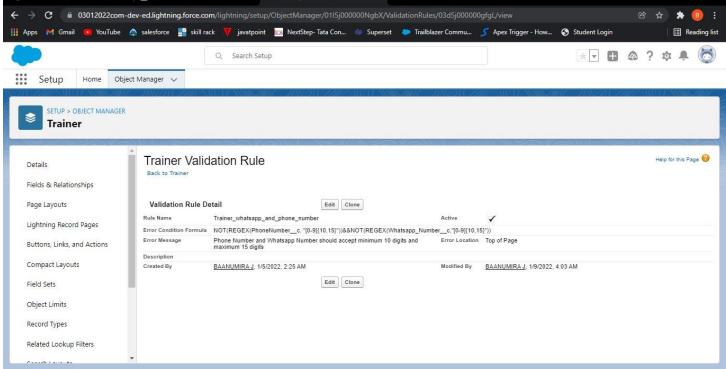
Detailed description: In this session I learnt about Validation rule how it works and what is the purpose etcA validation rule is like a formula or an expression where the condition returns true or false based on the criteria or rule for example if due date is approaching in 2 days it should send an email alert to the recepient Also there will be an error message, we can write the error message as per the requirement so it will be triggered once the condition become true

- 1. Validation rule on course field
- > Course Fees Cannot be Negative
- > Course Fees Should Be Less than 3000\$

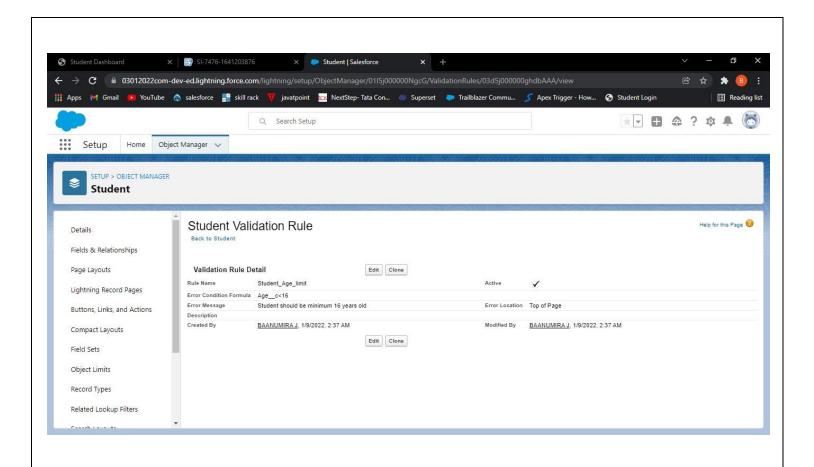


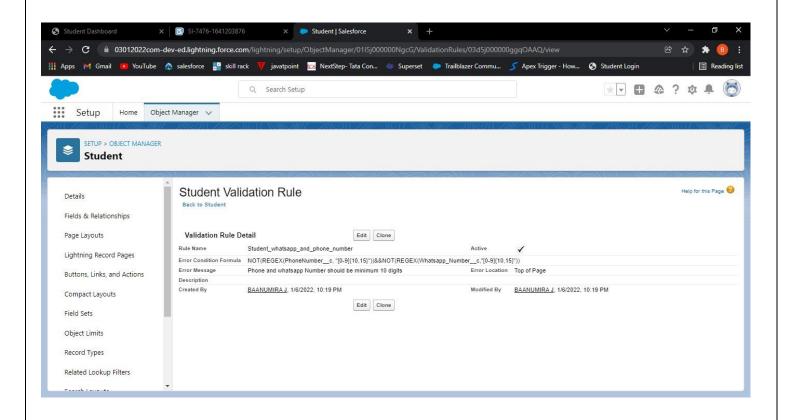
- 2. Validation rule on Trainer Object
  - > Age Should Not Be Less than 25 years
  - > Phone Number and Whatsapp Number should accept minimum 10 digits and maximum 15 digits

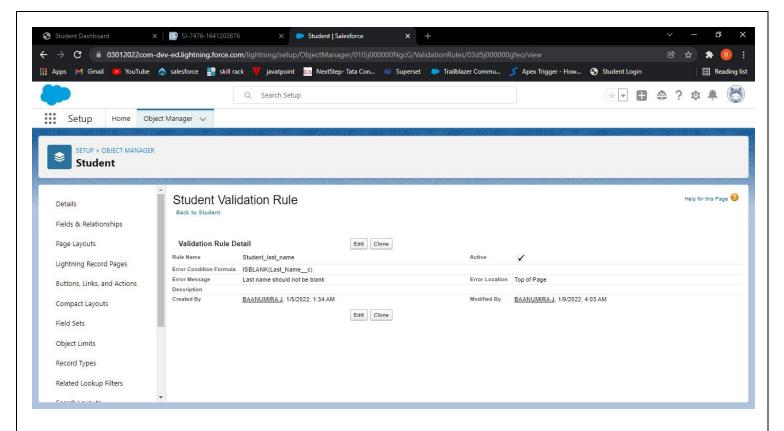




- 3. validation rule on student object
  - > Lastname should not be Blank
  - > Minimum 16 years of age
  - > Phone and whatsappNumber should be minimum 10 digits

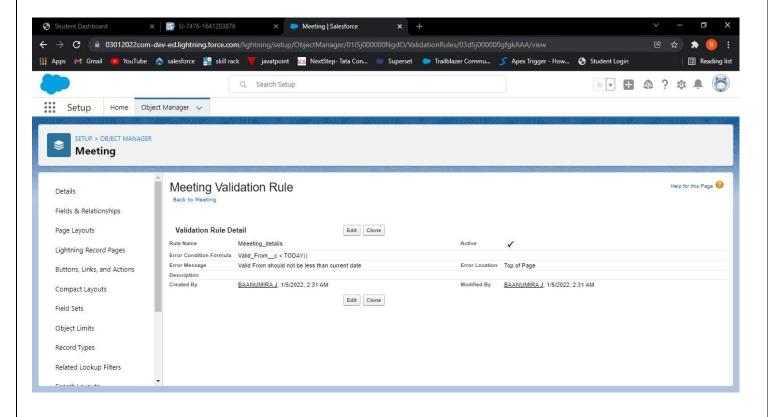


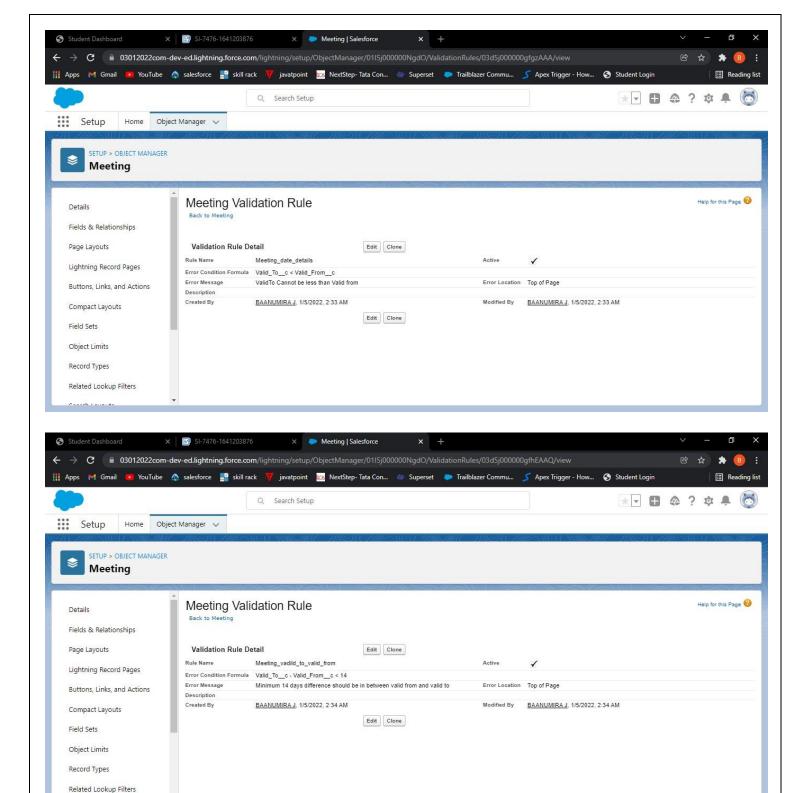




## 4. Validation rule on Meeting objects

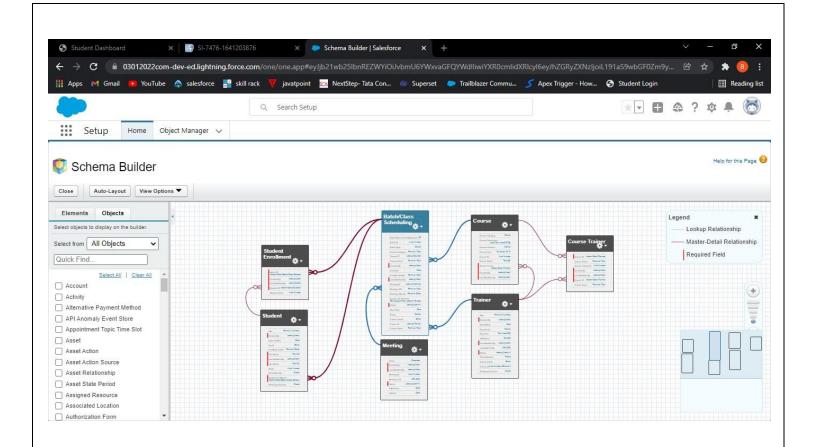
- > Valid From should not be less than current date
- > ValidTo Cannot be less than Valid from
- > Minimum 14 days difference should be in between valid from and valid to





Relationship between two objects established by using lookup or master-detail relationship Course object and trainer object has an junction object Course-Traine robject Student object and Batch scheduling object has an junction object Student-Enrollment object

I have created the master detail relationship using two methods one by creating object directly and the next method by using Schema builder



Day 4:

**Topic: Create Process automation** 

Milestone/Activites: Creating work flow rule on meeting object and batch object

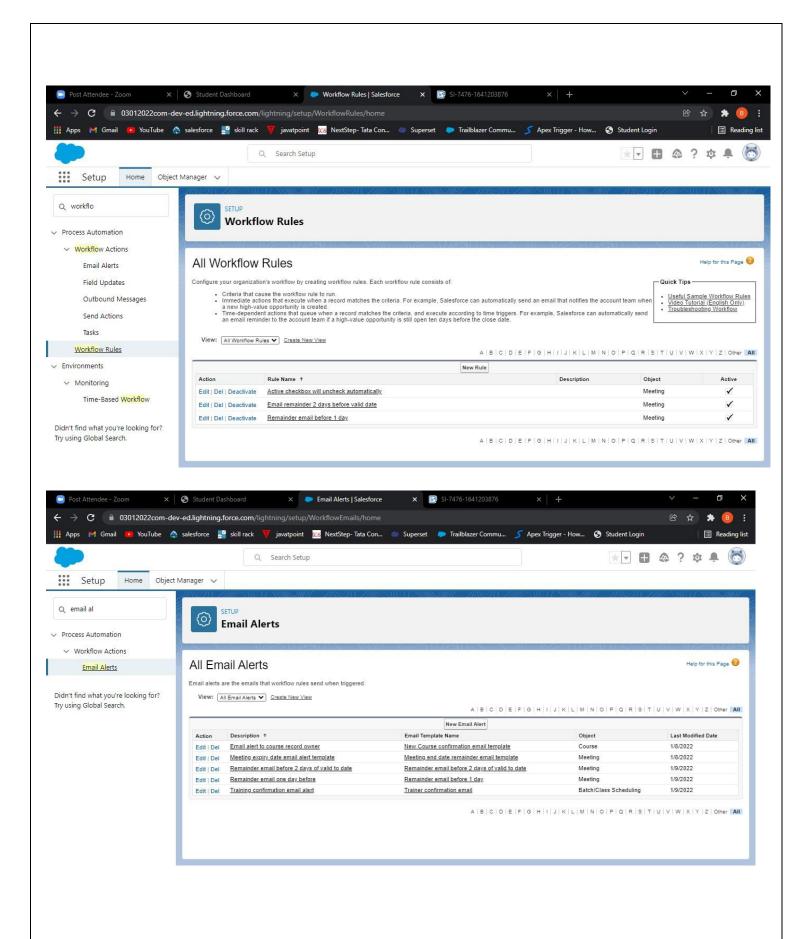
Detailed Description: The session is all about Process automation . It is used to construct a process or work flow in easy manner there are four types in it

- 1.Approval process
- 2.Process builder
- 3.Flows
- 4.Work flow

create work flow rule 1 day after valid to date the active check box will uncheck automatically and inform owner

create work flow rule 1 day before valid to date send a reminder email to owner

create work flow rule 2 days before valid to date send a reminder email to owner

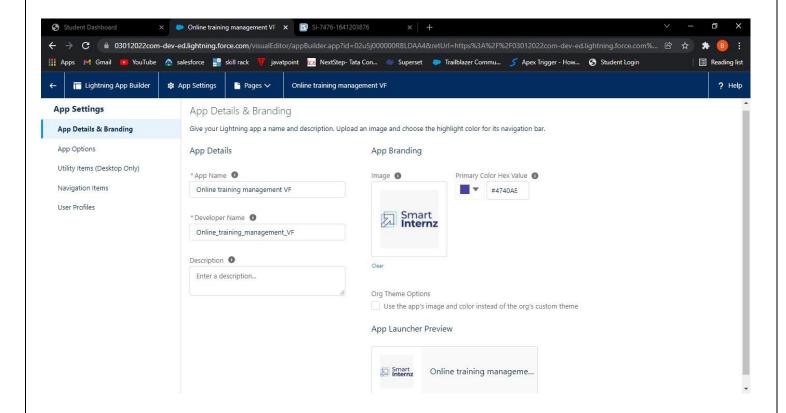


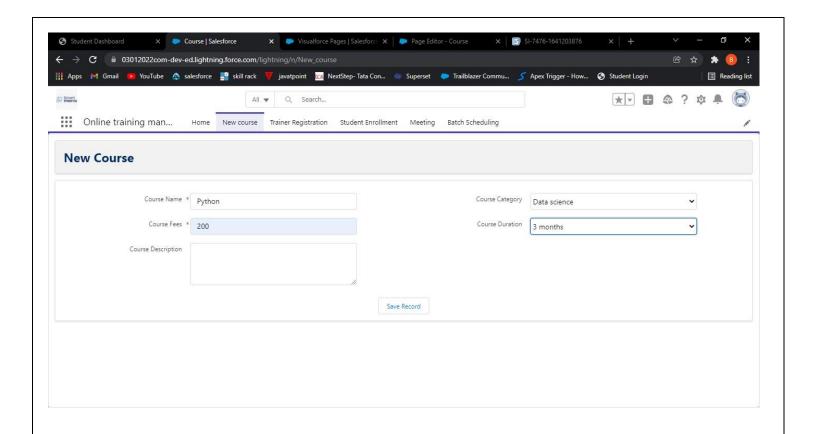
### Day 5:

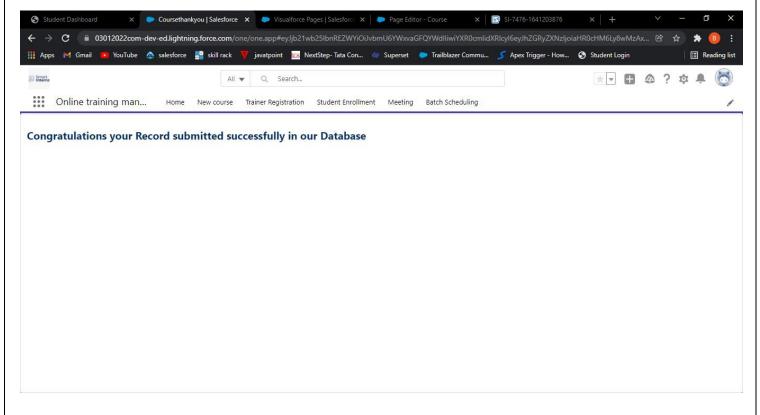
Topic: Create VisualForce page for Course Object

Milestone/Activites: Creating Custom Pages using Visualforce on the Course object of Online Training Management VF application

Detailed Description: The first requirement is to create a new application to display our tabs by using visual force pages I have created the application Online Trainig Management VF by using Lightning Experience App Manager for displaying the visual force created tabs. After that I have used the visual force page to customize my Course tab with my code. I've customized to land a new web page with thank you message once after the user clicked on the save record







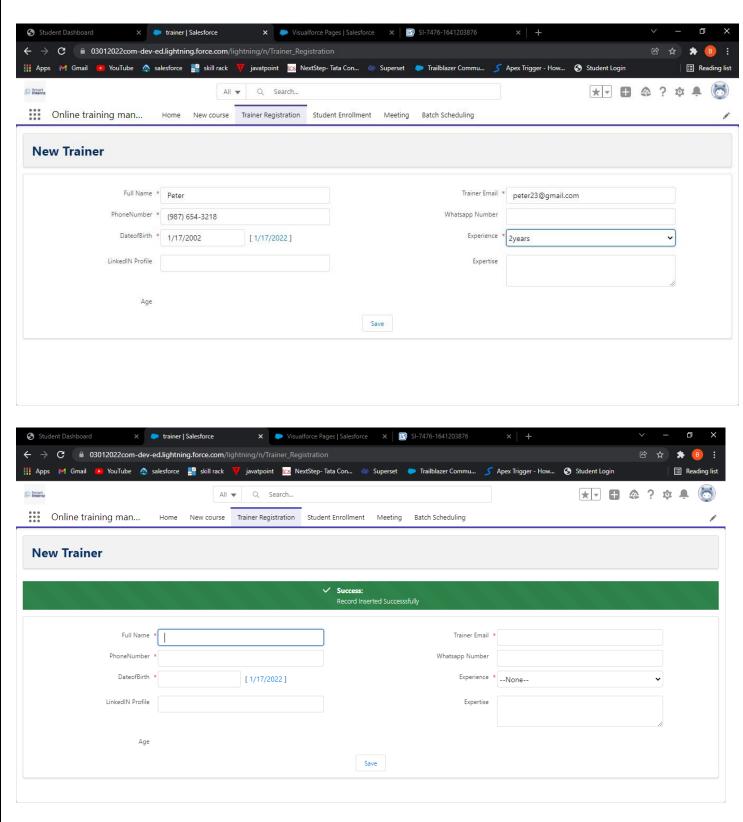
Day 6:

Topic: Create VisualForce page for Trainer Object

Milestone/Activites: Creating Custom Pages using Visualforce on the Trainer object of Online Training Management VF application

Detailed Description: By using Visual force pages I have customized trainer registration page on Online Training management VF application

. Here the requirement is to create a form to fill out the trainer details for registration and the record should be inserted successfully



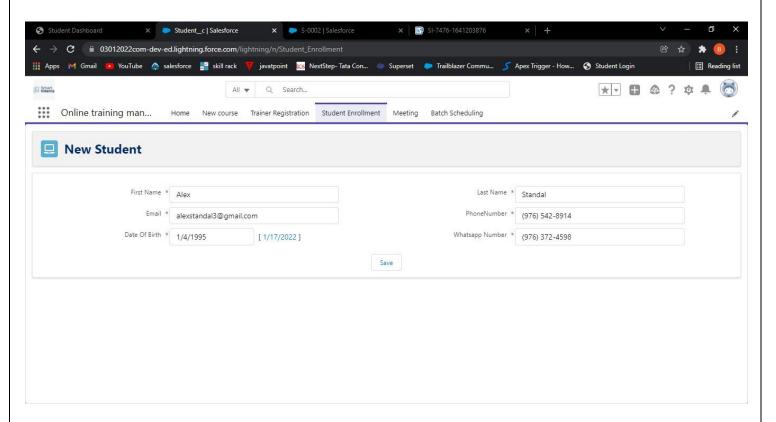
### Day 7:

Topic: Create VisualForce page for Student Object

Milestone/Activites: Creating Custom Pages using Visualforce on the Student object of Online Training Management VF application with the help of standard Controller

Detailed Description: By using Visual force pages I have customized Student Enrollment page on Online Training management VF application

. Here the requirement is to create a form to fill out the Student details for registration and the record should be inserted successfully to the database

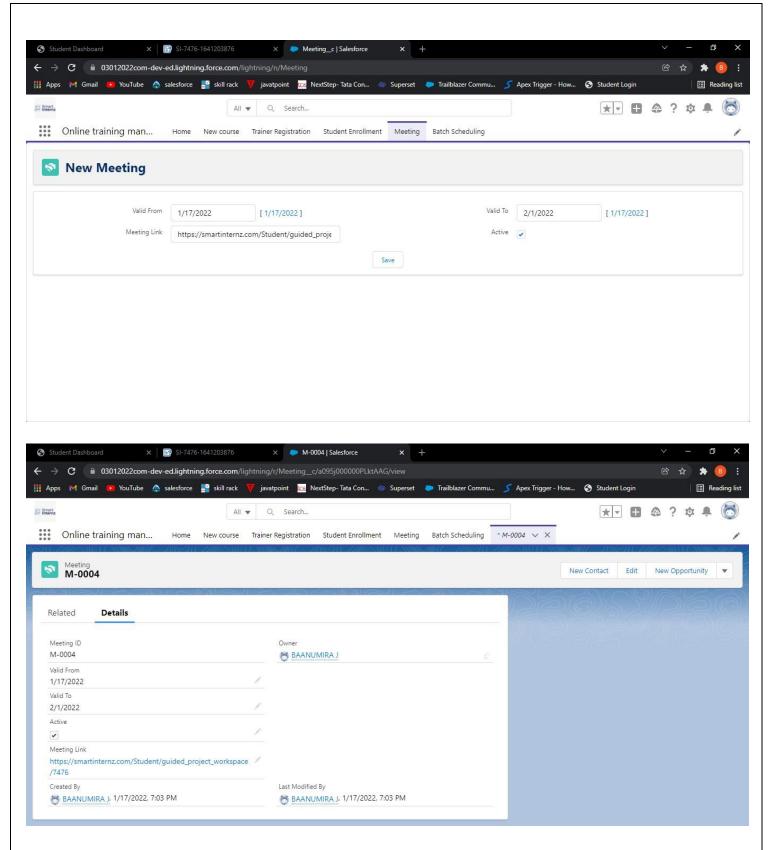


#### Day 8:

Topic: Create VisualForce page for Meeting Object

Milestone/Activites: Creating Custom Pages using Visualforce on the Meeting object of Online Training Management VF application with the help of standard Controller

Detailed Description: The requirement is to create a new meeting on Online Training Management App For this I have used the standard controller to save the new records on the database and customized the form with valid from , valid to, active checkbox and meeting link. when user creates new meeting record the meeting link will be active between valid from to valid to dates

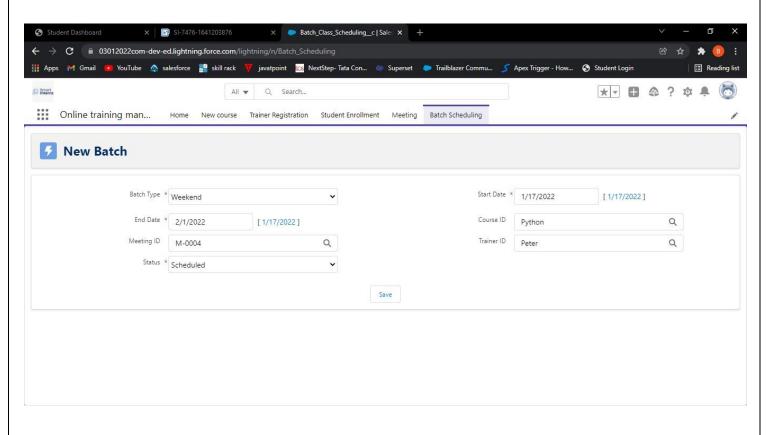


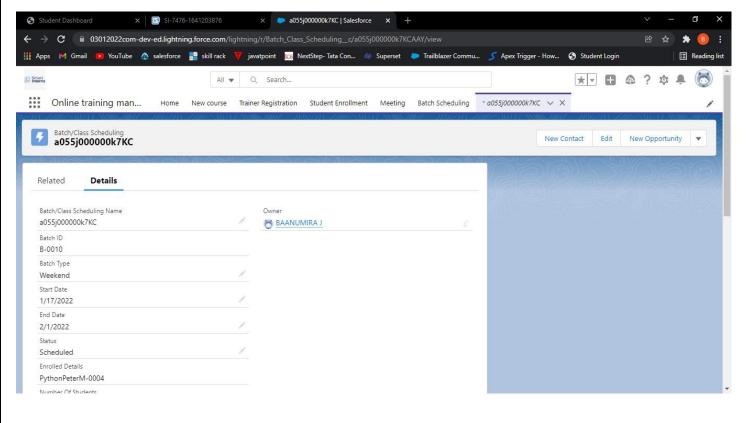
Day 9:

Topic: Create VisualForce page for Batch Object

Milestone/Activites: Creating Custom Pages using Visualforce on the Batch object of Online Training Management VF application with the help of standard Controller

Detailed Description: Customizing the batch details using visual force standard controller, where we can track the status of the batch also the start date end date and so on. When a user creats a new batch details on the online training managementVF app the record stores in the database once the user hits the save button



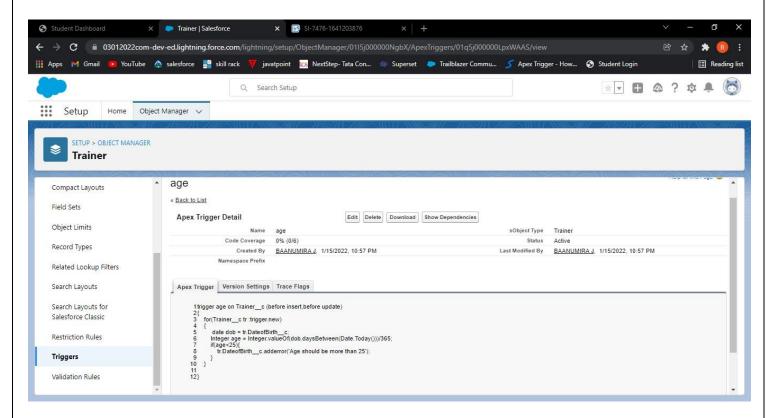


### Day 10:

Topic: Trigger on trainer Object

Milestone/Activites: Create a trigger on trainer object before or after an action invoked

Detailed Description:Trigger is an apex script which is used to enforce an action whenever the event triggered In this session I learnt the DML functions such as insert, update, delete etc. Here the requirement is for before insert and before update to date of birth condition is if age is greater than 25 it should activate an error message

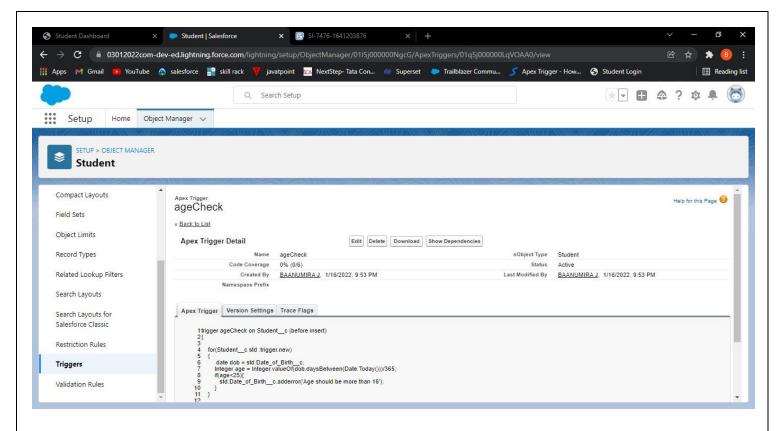


#### Day 11:

Topic: Trigger on StudentObject

Milestone/Activites: Create a trigger on Student object before or after an action invoked

Detailed Description: Here the requirement is before insert an record the student age should be checked for storing that record to the database .The condition is if age less than 25 the trigger invoked to display an error message that the age should be more than 16



Topic: Trigger on Meeting Object

Milestone/Activites: Create a trigger on Meeting object before or after an action invoked

Detailed Description: Here the requirement is before insert the conditions are if valid from less than today it should display an error message Valid From Date Should Be Greater Than Today. If valid to less than Valid From it should display an error message Valid To Date Should Be Greater Than Valid From

