

# **Project Title:**

## **A CRM Application for Professional Development Training Institute.**

### **Project Overview:**

This project focuses on creating a **CRM application for a Professional Development Training Institute**. The goal is to manage the institute's relationships with **corporate clients** and their employees, automating processes like **training program enrollment**, **session scheduling**, and **feedback collection**. By leveraging Salesforce, the application will enhance operational efficiency, improve client experience, and provide in-depth analytics on training effectiveness.

### **Objectives:**

- > Automate corporate client management, employee training enrollments, and session scheduling.
- > A centralized **Corporate Client Portal** for client and employee management.
- > **Reporting** on training progress, feedback.
- > **Dashboards** for admins, trainers, and corporate clients.

### **Salesforce Key Features and Concepts Utilized:**

- > **Custom Objects:** Corporate Clients, Employees, Training Programs, Appointments, Feedback.
- > **Screen Flows:** For training program enrollment, employee registration, and feedback submission.
- > **Approval Process:** For handling custom training requests from corporate clients.
- > **Lightning App Builder:** For building a user-friendly dashboard with all relevant components.

- > **Validation Rules:** To ensure data accuracy (e.g., valid email formats, session date checks).
- > **Reports and Dashboards:** To provide real-time insights into training effectiveness and client satisfaction.

## Detailed Steps to Solution Design:

### >> Data Model:

#### Corporate Client Object:

Edit Custom Object Help for this Page ?

### Corporate Client

Custom Object Definition Edit
Save Save & New Cancel

Custom Object Information
Required Information

The singular and plural labels are used in tabs, page layouts, and reports.  
**Be careful when changing the name or label as it may affect existing integrations and merge templates.**

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page

API Name

Corporate\_Client\_c

Custom

✓

Singular Label

Corporate Client

Plural Label

Corporate Clients

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

# Fields for Corporate Client:

## 1. Company Name (Text, Required)

Corporate Client Custom Field

Corporate Client

[Back to Corporate Client](#)

Help for this Page ?

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Corporate Client	Object Name	Corporate Client
Field Name	Corporate_Client	Data Type	Lookup
API Name	Corporate_Client__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:42 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:42 pm

Lookup Options

Related To	Employee	Child Relationship Name	Corporate_Clients
Related List Label	Corporate Clients		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

## 2. Industry (Picklist, Required)

Corporate Client Custom Field

Industry

[Back to Corporate Client](#)

Corporate Client Custom Field: Industry - Salesforce - Developer Edition

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Industry	Object Name	Corporate Client
Field Name	Industry	Data Type	Picklist
API Name	Industry__c		
Description	This field contains the list of the industry to which the client belongs. Eg., IT, Manufacturing, Finance, Healthcare, Education, etc.		
Help Text			
Data Owner			
Field Usage	Active		
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:01 pm	Modified By	MADUTHA SPHOORTHJ, 25/10/2024, 8:04 am

General Options

Required	<input checked="" type="checkbox"/>
Default Value	<input type="text"/>

Values

New | Reorder | Replace | Printable View | Chart Colors

Delete Selected | Deactivate Selected | Replace Selected

Values Help ?

<input type="checkbox"/> Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Construction	Construction	<input checked="" type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:01 pm
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Education	Education	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:01 pm
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Finance	Finance	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:01 pm
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Healthcare	Healthcare	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:01 pm
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	IT	IT	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:01 pm
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Manufacturing	Manufacturing	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:01 pm
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Other	Other	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:01 pm
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Real Estate	Real Estate	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:01 pm
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Retail	Retail	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:01 pm
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Telecommunications	Telecommunications	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:01 pm

3. Number of Employees (Number)

Corporate Client Custom Field

Number of Employees

Back to Corporate Client

Help for this Page ?

Validation Rules (0)

Custom Field Definition Detail

Edit | Set Field-Level Security | View Field Accessibility | Where is this used?

Field Information

Field Label	Number of Employees	Object Name	Corporate Client
Field Name	Number_of_Employees	Data Type	Number
API Name	Number_of_Employees_c		
Description	The number of employees to be enrolled.		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:04 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:04 pm

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input checked="" type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

4. Contact Person (Lookup → Contact)

Corporate Client Custom Field

Contact Person

Back to Corporate Client

Help for this Page ?

Validation Rules (0)

Custom Field Definition Detail

Edit | Set Field-Level Security | View Field Accessibility | Where is this used?

Field Information

Field Label	Contact Person	Object Name	Corporate Client
Field Name	Contact_Person	Data Type	Lookup
API Name	Contact_Person_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:05 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:05 pm

Lookup Options

Related To	Contact	Child Relationship Name	Corporate_Clients
Related List Label	Corporate Clients		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

## 5. Account Manager (Lookup → User)

Corporate Client Custom Field

Account Manager

[Back to Corporate Client](#)

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Account Manager	Object Name	Corporate Client
Field Name	Account_Manager	Data Type	Lookup
API Name	Account_Manager__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY 24/10/2024, 7:06 pm	Modified By	MADUTHA SPHOORTHY 24/10/2024, 7:06 pm

Lookup Options

Related To	User	Child Relationship Name	Corporate_Clients
Related List Label	Corporate Clients		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

## 6. Contract Value (Currency)

Contract Value

[Back to Corporate Client](#)

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Contract Value	Object Name	Corporate Client
Field Name	Contract_Value	Data Type	Currency
API Name	Contract_Value__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY 24/10/2024, 7:07 pm	Modified By	MADUTHA SPHOORTHY 24/10/2024, 7:07 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Currency Options

Length	18
Decimal Places	0

7. Contract Start Date (Date)

Corporate Client Custom Field

Contract Start Date

[Back to Corporate Client](#)

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Contract Start Date	Object Name	Corporate Client
Field Name	Contract_Start_Date	Data Type	Date
API Name	Contract_Start_Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA.SPHOORTHJI, 24/10/2024, 7:07 pm	Modified By	MADUTHA.SPHOORTHJI, 24/10/2024, 7:07 pm

General Options

Required	<input type="checkbox"/>
Default Value	

8. Contract End Date (Date)

Corporate Client Custom Field

Contract End Date

[Back to Corporate Client](#)

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Contract End Date	Object Name	Corporate Client
Field Name	Contract_End_Date	Data Type	Date
API Name	Contract_End_Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA.SPHOORTHJI, 24/10/2024, 7:08 pm	Modified By	MADUTHA.SPHOORTHJI, 24/10/2024, 7:08 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Object 2: Employee

Details

Edit

Delete

Description

The employees who will be enrolling into the program.

API Name

Employee\_\_c

Custom

✓

Singular Label

Employee

Plural Label

Employees

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

# Fields for Employee:

## 1. First Name (Text)

Employee Custom Field

First Name

[Back to Employee](#)

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	First Name	Object Name	Employee
Field Name	First_Name	Data Type	Text
API Name	First_Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:10 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:15 pm

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input type="checkbox"/>

## 2. Last Name (Text)

Employee Custom Field

Last Name

[Back to Employee](#)

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Last Name	Object Name	Employee
Field Name	Last_Name	Data Type	Text
API Name	Last_Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:11 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:11 pm

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input type="checkbox"/>

### 3. Email (Email)

Employee Custom Field

Email

[Back to Employee](#)

Validation Rules 0

Help for this Page ?

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Email	Object Name	Employee
Field Name	Email	Data Type	Email
API Name	Email__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY, 24/10/2024, 7:12 pm	Modified By	MADUTHA SPHOORTHY, 25/10/2024, 7:43 am

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input checked="" type="checkbox"/>
External ID	<input checked="" type="checkbox"/>
Default Value	

### 4. Phone (Phone)

Employee Custom Field

Phone

[Back to Employee](#)

Validation Rules 0

Help for this Page ?

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Phone	Object Name	Employee
Field Name	Phone	Data Type	Phone
API Name	Phone__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level	Employee Custom Field: Phone - Salesforce - Developer Edition		
Compliance Categorization			
Created By	MADUTHA SPHOORTHY, 24/10/2024, 7:12 pm	Modified By	MADUTHA SPHOORTHY, 24/10/2024, 7:12 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

### 5. Job Title (Text)

Employee Custom Field

Job Title

[Back to Employee](#)

Validation Rules 0

Help for this Page ?

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Job Title	Object Name	Employee
Field Name	Job_Title	Data Type	Text
API Name	Job_Title__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY, 24/10/2024, 7:14 pm	Modified By	MADUTHA SPHOORTHY, 25/10/2024, 7:44 am

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input checked="" type="checkbox"/>



## 6. Corporate Client (Lookup → Corporate Client)

Employee Custom Field

Corporate Client

[Back to Employee](#)

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Corporate Client	Object Name	Employee
Field Name	Corporate_Client	Data Type	Lookup
API Name	Corporate_Client__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:14 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:14 pm

Lookup Options

Related To	Corporate Client	Child Relationship Name	Employees
Related List Label	Employees		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

## 7. Date of Hire (Date)

Employee Custom Field

Date of Hire

[Back to Employee](#)

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Date of Hire	Object Name	Employee
Field Name	Date_of_Hire	Data Type	Date
API Name	Date_of_Hire__c		
Description			
Help Text			
Data Owner	Employee Custom Field: Date of Hire ~ Salesforce - Developer Edition		
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:15 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:15 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

## 8. Status (Picklist: Active, Inactive)

Employee Custom Field

Status

[Back to Employee](#)

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Status	Object Name	Employee
Field Name	Status	Data Type	Picklist
API Name	Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:16 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:16 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

Values

New

Values Help ?

Action	Values	API Name	Default	Chart Colors	Modified By
<a href="#">Edit</a>	Active, Inactive	Active, Inactive	<input type="checkbox"/>	Assigned dynamically	<a href="#">MADUTHA SPHOORTHJ</a> , 24/10/2024, 7:16 pm

### Object 3: Training Program

Details

[Edit](#)[Delete](#)

Description

API Name  
Training\_Program\_\_c

Custom  
✓

Singular Label  
Training Program

Plural Label  
Training Programs

Enable Reports

Track Activities

Track Field History

Deployment Status  
Deployed


Help Settings  
Standard salesforce.com Help Window

### Fields for Training Program:

1. Course Duration

Training Program Custom Field  
Course Duration

[Back to Training Program](#)

[Help for this Page](#) 

Validation Rules 0

Custom Field Definition Detail

[Edit](#)

[Set Field-Level Security](#)

[View Field Accessibility](#)

[Where is this used?](#)

Field Information

Field Label	Course Duration	Object Name	Training_Program
Field Name	Course_Duration	Data Type	Number
API Name	Course_Duration__c		
Description	In weeks		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	<a href="#">MADUTHA SPHOORTHJ</a> , 24/10/2024, 7:19 pm	Modified By	<a href="#">MADUTHA SPHOORTHJ</a> , 25/10/2024, 10:34 pm

## 2. Program Fee (Currency)

Training Program Custom Field

Program Fee

[Back to Training Program](#)

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Program Fee	Object Name	Training Program
Field Name	Program_Fee	Data Type	Currency
API Name	Program_Fee__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ 24/10/2024, 7:19 pm	Modified By	MADUTHA SPHOORTHJ 25/10/2024, 10:35 pm

General Options

Required	<input type="checkbox"/>
Default Value	

## 3. Trainer (Lookup → User)

Training Program Custom Field

Trainer

[Back to Training Program](#)

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Trainer	Object Name	Training Program
Field Name	Trainer	Data Type	Lookup
API Name	Trainer__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ 24/10/2024, 7:20 pm	Modified By	MADUTHA SPHOORTHJ 24/10/2024, 7:20 pm

Lookup Options

Related To	User	Child Relationship Name	Training_Programs
Related List Label	Training Programs		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

## 4. Program Type

Training Program Custom Field

Program Type

[Back to Training Program](#)

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Program Type	Object Name	Training Program
Field Name	Program_Type	Data Type	Picklist
API Name	Program_Type__c		
Description			
Help Text			
Data Owner			
Field Usage	Active		
Data Sensitivity Level	Public		
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ 24/10/2024, 7:21 pm	Modified By	MADUTHA SPHOORTHJ 25/10/2024, 10:36 pm

General Options

Required	<input type="checkbox"/>
Default Value	

5. Start Date (Date)

Training Program Custom Field

Start Date

[Back to Training Program](#)

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Start Date	Object Name	Training Program
Field Name	Start_Date	Data Type	Date
API Name	Start_Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY 24/10/2024, 7:22 pm	Modified By	MADUTHA SPHOORTHY 25/10/2024, 10:37 pm

General Options

Required	<input type="checkbox"/>
Default Value	

6. End Date (Date)

Training Program Custom Field

End Date

[Back to Training Program](#)

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	End Date	Object Name	Training Program
Field Name	End_Date	Data Type	Date
API Name	End_Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY 24/10/2024, 7:22 pm	Modified By	MADUTHA SPHOORTHY 25/10/2024, 10:35 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Object 4: Appointment (Training Session)

API Name

Appointment\_\_c

Custom

✓

Singular Label

Appointment

Plural Label

Appointments

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

## Fields for Appointment:

### 1. Session Date

Appointment Custom Field

Session Date

[Back to Appointment](#)

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Session Date	Object Name	Appointment
Field Name	Session_Date	Data Type	Date
API Name	Session_Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY 24/10/2024, 7:25 pm	Modified By	MADUTHA SPHOORTHY 24/10/2024, 7:25 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

### 2. Time

Appointment Custom Field

Time

[Back to Appointment](#)

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Time	Object Name	Appointment
Field Name	Time	Data Type	Time
API Name	Time__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY 24/10/2024, 7:25 pm	Modified By	MADUTHA SPHOORTHY 24/10/2024, 7:25 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

### 3. Training Program (Lookup → Training Program)

Appointment Custom Field

Training Program

Back to Appointment

Help for this Page ?

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Training Program	Object Name	Appointment
Field Name	Training_Program	Data Type	Lookup
API Name	Training_Program__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:26 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:26 pm

Lookup Options

Related To	Training Program	Child Relationship Name	Appointments
Related List Label	Appointments		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

#### 4. Trainer (Lookup → User)

Appointment Custom Field

Trainer

Back to Appointment

Help for this Page ?

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Trainer	Object Name	Appointment
Field Name	Trainer	Data Type	Lookup
API Name	Trainer__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:27 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:27 pm

Lookup Options

Related To	User	Child Relationship Name	Appointments
Related List Label	Appointments		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

#### 5. Employee (Lookup → Employee)

Appointment Custom Field

Employee

Back to Appointment

Help for this Page ?

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Employee	Object Name	Appointment
Field Name	Employee	Data Type	Lookup
API Name	Employee__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:28 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:28 pm

Lookup Options

Related To	Employee	Child Relationship Name	Appointments
Related List Label	Appointments		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

## 6. Session Status (Picklist: Scheduled, Completed, Canceled)

Appointment Custom Field

Session Status

[Back to Appointment](#)

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Session Status	Object Name	Appointment
Field Name	Session_Status	Data Type	Picklist
API Name	Session_Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:28 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:28 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	<div></div>

Values

New

Reorder

Replace

Printable View

Chart Colors

Delete Selected

Deactivate Selected

Replace Selected

Values Help

<input type="checkbox"/> Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Scheduled	Scheduled	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:28 pm
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Completed	Completed	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:28 pm
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Canceled	Canceled	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:28 pm
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Postponed	Postponed	<input type="checkbox"/>	Assigned dynamically	MADUTHA SPHOORTHJ, 24/10/2024, 7:28 pm

## Object 5: Feedback

API Name	Feedback__c	Enable Reports
Custom	<input checked="" type="checkbox"/>	Track Activities
Singular Label	Feedback	Track Field History
Plural Label	Feedbacks	Deployment Status
		Deployed
		Help Settings
		Standard salesforce.com Help Window

### Fields for Feedback:

1. Rating (Number, 1-5)

Feedback Custom Field
Rating
Back to Feedback
Help for this Page

Validation Rules (0)

Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?

Field Information

Field Label	Rating	Object Name	Feedback
Field Name	Rating	Data Type	Number
API Name	Rating__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY, 24/10/2024, 7:36 pm	Modified By	MADUTHA SPHOORTHY, 24/10/2024, 7:36 pm

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>

## 2. Comments (Text Area)

Feedback Custom Field
Comments
Back to Feedback
Help for this Page

Validation Rules (0)

Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?

Field Information

Field Label	Comments	Object Name	Feedback
Field Name	Comments	Data Type	Text Area
API Name	Comments__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY, 24/10/2024, 7:36 pm	Modified By	MADUTHA SPHOORTHY, 24/10/2024, 7:36 pm

General Options

Required	<input type="checkbox"/>
Default Value	

## 3. Employee (Lookup → Employee)

Feedback Custom Field
Employee
Back to Feedback
Help for this Page

Validation Rules (0)

Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?

Field Information

Field Label	Employee	Object Name	Feedback
Field Name	Employee	Data Type	Lookup
API Name	Employee__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY, 24/10/2024, 7:37 pm	Modified By	MADUTHA SPHOORTHY, 24/10/2024, 7:37 pm

Lookup Options

Related To	Employee	Child Relationship Name	Feedbacks
Related List Label	Feedbacks		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

## 4. Appointment (Lookup → Appointment)



Feedback Custom Field

Appointment

Back to Feedback

Help for this Page

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Appointment	Object Name	Feedback
Field Name	Appointment	Data Type	Lookup
API Name	Appointment__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHIL 24/10/2024, 7:38 pm	Modified By	MADUTHA SPHOORTHIL 24/10/2024, 7:38 pm

Lookup Options

Related To	Appointment	Child Relationship Name	Feedbacks
Related List Label	Feedbacks		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

5. Submitted Date (Date)

Feedback Custom Field

Submitted Date

Back to Feedback

Help for this Page

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Submitted Date	Object Name	Feedback
Field Name	Submitted_Date	Data Type	Date
API Name	Submitted_Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHIL 24/10/2024, 7:38 pm	Modified By	MADUTHA SPHOORTHIL 24/10/2024, 7:38 pm

General Options

Required	<input type="checkbox"/>
Default Value	

# Define Relationships Between Objects

## >Lookup Relationships

Corporate Client ↔ Employee:

Lookup field on the Employee object that references the Corporate Client object.

Corporate Client Custom Field

Corporate Client

[Back to Corporate Client](#)

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Corporate Client	Object Name	Corporate Client
Field Name	Corporate_Client	Data Type	Lookup
API Name	Corporate_Client__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY, 24/10/2024, 7:42 pm	Modified By	MADUTHA SPHOORTHY, 24/10/2024, 7:42 pm

Lookup Options

Related To	Employee	Child Relationship Name	Corporate_Clients
Related List Label	Corporate Clients		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Employee Custom Field

Corporate Client

[Back to Employee](#)

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Corporate Client	Object Name	Employee
Field Name	Corporate_Client	Data Type	Lookup
API Name	Corporate_Client__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHY, 24/10/2024, 7:14 pm	Modified By	MADUTHA SPHOORTHY, 24/10/2024, 7:14 pm

Lookup Options

Related To	Corporate Client	Child Relationship Name	Employees
Related List Label	Employees		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Training Program ↔ Appointment:

Lookup field on the Appointment object that references the Training Program object.

Training Program Custom Field

Appointment

[Back to Training Program](#)

Help for this Page

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Appointment	Object Name	Training Program
Field Name	Appointment1	Data Type	Lookup
API Name	Appointment1__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 26/10/2024, 10:43 pm	Modified By	MADUTHA SPHOORTHJ, 26/10/2024, 10:43 pm

Lookup Options

Related To	Appointment	Child Relationship Name	Training_Programs1
Related List Label	Training Programs (Appointment)		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Appointment Custom Field

Training Program

[Back to Appointment](#)

Help for this Page

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Training Program	Object Name	Appointment
Field Name	Training_Program	Data Type	Lookup
API Name	Training_Program__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHJ, 24/10/2024, 7:26 pm	Modified By	MADUTHA SPHOORTHJ, 24/10/2024, 7:26 pm

Lookup Options

Related To	Training Program	Child Relationship Name	Appointments
Related List Label	Appointments		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Appointment Custom Field: Training Program - Salesforce - Developer Edition

Employee ↔ Appointment:

Appointment Custom Field

Employee

[Back to Appointment](#)

Help for this Page

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Employee	Object Name	Appointment
Field Name	Employee	Data Type	Lookup
API Name	Employee__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHQORTHIL	Modified By	MADUTHA SPHQORTHIL
	24/10/2024, 7:28 pm		24/10/2024, 7:28 pm

Lookup Options

Related To	Employee	Child Relationship Name	Appointments
Related List Label	Appointments		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Employee Custom Field

Appointment

[Back to Employee](#)

Help for this Page

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Appointment	Object Name	Employee
Field Name	Appointment	Data Type	Lookup
API Name	Appointment__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHQORTHIL	Modified By	MADUTHA SPHQORTHIL
	25/10/2024, 9:58 am		25/10/2024, 9:58 am

Lookup Options

Related To	Appointment	Child Relationship Name	Employees
Related List Label	Employees		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

# Feedback ↔ Appointment and Employee:

Feedback Custom Field

Appointment

Back to Feedback

Feedback Custom Field: Appointment – Salesforce – Developer Edition

Help for this Page

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Appointment	Object Name	Feedback
Field Name	Appointment	Data Type	Lookup
API Name	Appointment__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHU, 24/10/2024, 7:38 pm	Modified By	MADUTHA SPHOORTHU, 24/10/2024, 7:38 pm

Lookup Options

Related To	Appointment	Child Relationship Name	Feedbacks
Related List Label	Feedbacks		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Appointment Custom Field

Feedback

Back to Appointment

Appointment Custom Field: Feedback – Salesforce – Developer Edition

Help for this Page

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Feedback	Object Name	Appointment
Field Name	Feedback	Data Type	Lookup
API Name	Feedback__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHU, 25/10/2024, 10:00 am	Modified By	MADUTHA SPHOORTHU, 25/10/2024, 10:00 am

Lookup Options

Related To	Feedback	Child Relationship Name	Appointments
Related List Label	Appointments		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Feedback Custom Field

Employee

Back to Feedback

Feedback Custom Field: Employee – Salesforce – Developer Edition

Help for this Page

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Employee	Object Name	Feedback
Field Name	Employee	Data Type	Lookup
API Name	Employee__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHU, 24/10/2024, 7:37 pm	Modified By	MADUTHA SPHOORTHU, 24/10/2024, 7:37 pm

Lookup Options

Related To	Employee	Child Relationship Name	Feedbacks
Related List Label	Feedbacks		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

# Validation Rules

## >Email Validation (Employee Object):

This ensures that the email address is formatted correctly.

Employee Validation Rule

Back to Employee

Help for this Page

Validation Rule Detail

EditClone

Rule Name	Email_Validation	Active	✓
Error Condition Formula	NOT(REGEX(Email__c, "[a-zA-Z0-9_%+-]+@[a-zA-Z0-9-]+\.[a-zA-Z]{2,4}"))		
Error Message	Please enter a valid email address.	Error Location	Top of Page
Description			
Created By	MADUTHA SPHOORTHY, 24/10/2024, 7:46 pm	Modified By	MADUTHA SPHOORTHY, 25/10/2024, 7:54 am

EditClone

## >Appointment Date Validation (Appointment Object):

Ensures that the session date is not in the past.

Appointment Validation Rule

Back to Appointment

Help for this Page

Validation Rule Detail

EditClone

Rule Name	Appointment_Date_Validation	Active	✓
Error Condition Formula	Session_Date__c < TODAY()		
Error Message	The session date cannot be in the past.	Error Location	Top of Page
Description			
Created By	MADUTHA SPHOORTHY, 24/10/2024, 7:47 pm	Modified By	MADUTHA SPHOORTHY, 24/10/2024, 7:47 pm

EditClone

## >Session Time Validation (Appointment Object)

Ensure that the session time is scheduled within business hours (e.g., 9 AM to 5 PM).

### Appointment Validation Rule

[Back to Appointment](#)[Help for this Page ?](#)

**Validation Rule Detail**

EditClone

Rule Name	Session_Time	Active	✓
Error Condition Formula	OR( HOUR(Time__c) < 9, HOUR(Time__c) > 17 )		
Error Message	The session time must be between 9:00 AM and 5:00 PM.	Error Location	Top of Page
Description			
Created By	MADUTHA.SPHOORTHIL, 24/10/2024, 7:50 pm	Modified By	MADUTHA.SPHOORTHIL, 24/10/2024, 7:50 pm

EditClone

## >Training Program Start and End Dates (Training Program Object)

Ensure that the end date of a training program is always after the start date.

### Training Program Validation Rule

[Back to Training Program](#)[Help for this Page ?](#)

**Validation Rule Detail**

EditClone

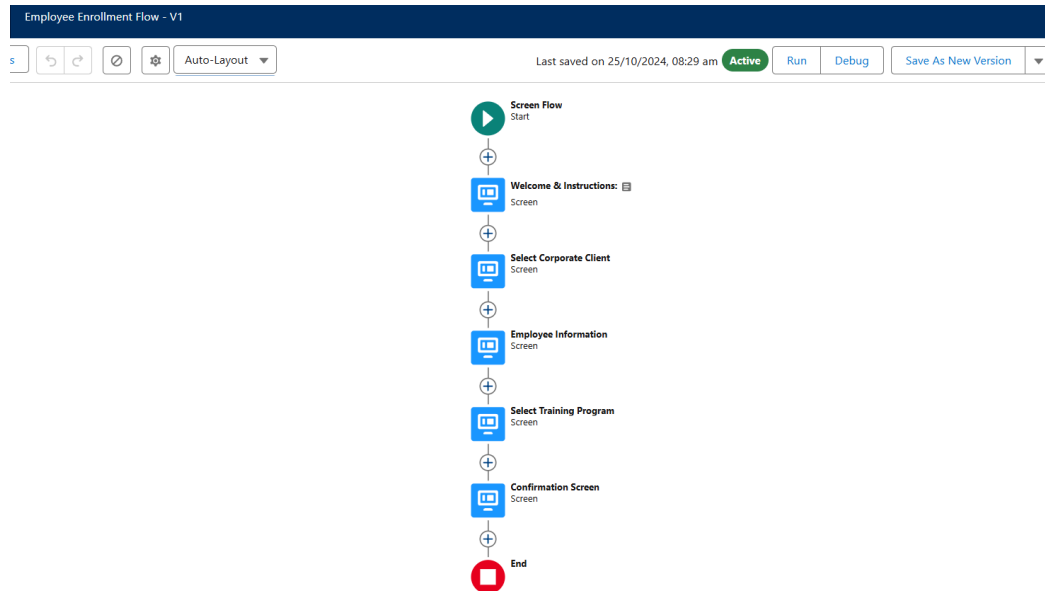
Rule Name	Training_Start_and_End_Dates	Active	✓
Error Condition Formula	End_Date__c < Start_Date__c		
Error Message	The End Date must be after the Start Date.	Error Location	Top of Page
Description			
Created By	MADUTHA.SPHOORTHIL, 24/10/2024, 7:49 pm	Modified By	MADUTHA.SPHOORTHIL, 24/10/2024, 7:49 pm

EditClone

# Key Screen Flows Application:

>Employee Enrollment Flow:

Allow corporate clients to enroll their employees in training programs using a guided flow that captures all necessary employee details.



→ Welcome

Employee Enrollment Flow

Welcome! Please enter the employee details to enroll them in the training

Pause

Previous

Finish



## → Corporate Client

Employee Enrollment Flow

\* Corporate Client Name

Pause

Previous

Finish

Screen Properties

\* Label

Select Corporate Client

\* API Name ⓘ

Select\_Corporate\_Client

Description

> Configure Header

## → Employee Information

Employee Enrollment Flow

\* First Name

\* Last Name

\* Email

Screen Properties

\* Label

Employee Information

\* API Name ⓘ

Employee\_Information

Description

> Configure Header

## → Training Program

Header

Employee Enrollment Flow

Select Program

--None--

Pause

Previous

Finish

Screen Properties

\* Label

Select Training Program

\* API Name ⓘ

Select\_Training\_Program

Description

> Configure Header

## → Confirmation

**Employee Enrollment Flow**

Thank you for enrolling, {!First\_Name}{!Last\_Name}! Here's a summary of the information entered.  
{!Select\_Program}

Pause

Previous

Finish

Screen Properties

\* Label

Confirmation Screen

\* API Name ⓘ

Confirmation\_Screen

Description

> Configure Header

## → The flow as it is run.

### Employee Enrollment Flow

Welcome! Please enter the employee details to enroll them in the training

Next

### Employee Enrollment Flow

\* Corporate Client Name

Google

Previous

Next

### Employee Enrollment Flow

\* First Name

Sphoorthi

\* Last Name

Madutha

\* Email

sphoorthigold.21@gmail.com

Previous

Next

### Employee Enrollment Flow

Select Program

--None--

--None--

Workshop

Certification

Skill Development

Leadership Training


Continuing Education

Custom Training Program

Allow corporate clients or admins to book training sessions for employees.



### Appointment Booking Flow

 **Lookup** Select Employee

No preview is available for this component.

Pause

Previous

Finish

#### Screen Properties

\* Label

Select Employee

\* API Name ⓘ

Select\_Employee

Description

> Configure Header

→ Select Training Program:

**Appointment Booking Flow**

\* Select Program

--None--

Pause Previous Finish

**Screen Properties**

\* Label  
Select Training Program

\* API Name ⓘ  
Select\_Training\_Program

Description

> Configure Header

→ Select Date and Time:

**Appointment Booking Flow**

Date/Time

\* Date \* Time

Pause Previous Finish

**Screen Properties**

\* Label  
Select Date and Time


\* API Name ⓘ  
Select\_Date\_and\_Time

Description

> Configure Header

→ Select Trainer:

**Appointment Booking Flow**

 **Lookup** Select Trainer

No preview is available for this component.

Pause Previous Finish

**Screen Properties**

\* Label  
Select Trainer

\* API Name ⓘ  
Select\_Trainer

Description

> Configure Header

## → Confirmation

Appointment Booking Flow

{!SelectEmployee.recordId}{!SelectTrainer.recordIds}{!Date\_Time}

Pause

Previous

Finish

Screen Properties

\* Label

Confirmation

\* API Name ⓘ

Confirmation

Description

> Configure Header

## → RUN (of Flow)

Appointment Booking Flow

Select Employee

Search...

Appointment Booking Flow

\* Select Program

--None--

--None--

Workshop

Certification

Skill Development

Leadership Training

Continuing Education

Custom Training Program

Appointment Booking Flow

\* Date/Time

29-Oct-2024

10:00 am

Previous

Next

Appointment Booking Flow

29/10/2024, 10:00 am

Previous

Finish

# Testing and Validation

## Unit Testing (Apex Classes, Triggers).

### Apex Classes:

		Developer Console	New	Generate from WSDL	Run All Tests	Schedule Apex		
Action	Name ↑	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">TrainingProgramApprovalTriggerTest</a>		62.0	Active	1,575	MADUTHA SPHOORTHIL, 25/10/2024, 11:01 pm	<input type="checkbox"/>	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">TrainingProgramTriggerTest</a>		62.0	Active	559	MADUTHA SPHOORTHIL, 25/10/2024, 10:31 pm	<input type="checkbox"/>	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Security</a>	<a href="#">UpdateEmployeeStatusOnApproval</a>		62.0	Active	48	MADUTHA SPHOORTHIL, 25/10/2024, 8:56 pm	<input type="checkbox"/>	

Class BodyClass SummaryVersion SettingsTrace Flags

```
1  @isTest
2  public class TrainingProgramApprovalTriggerTest {
3      @isTest
4      static void testApprovalStatus() {
5          // Create a test training program
6          Training_Program__c testProgram = new Training_Program__c();
7          testProgram.Name = 'Test Program';
8          testProgram.Approval_Request__c = false;
9          insert testProgram;
10
11         // Update the program to mark it as approved
12         testProgram.Approval_Request__c = true;
13         update testProgram;
14
15         // Retrieve the updated record
16         Training_Program__c updatedProgram = [SELECT Id, Approval_Status__c FROM Training_Program__c WHERE Id = :testProgram.Id];
17
18         // Assert that the approval status is set correctly
19         System.assertEquals('Approved', updatedProgram.Approval_Status__c, 'The approval status should be set to Approved');
20
21         // Test for pending status
22         testProgram.Approval_Request__c = false;
23         update testProgram;
24         updatedProgram = [SELECT Id, Approval_Status__c FROM Training_Program__c WHERE Id = :testProgram.Id];
25         System.assertEquals('Pending', updatedProgram.Approval_Status__c, 'The approval status should be set to Pending');
26
27         // Test for rejected status
28         testProgram.Approval_Status__c = 'Rejected';
29         update testProgram;
30         updatedProgram = [SELECT Id, Approval_Status__c FROM Training_Program__c WHERE Id = :testProgram.Id];
31         System.assertEquals('Rejected', updatedProgram.Approval_Status__c, 'The approval status should be set to Rejected');
32
33         // Test for draft status
34         testProgram.Approval_Status__c = 'Draft';
35         update testProgram;
36         updatedProgram = [SELECT Id, Approval_Status__c FROM Training_Program__c WHERE Id = :testProgram.Id];
37         System.assertEquals('Draft', updatedProgram.Approval_Status__c, 'The approval status should be set to Draft');
38     }
39 }
```

« Back to List Apex Triggers

Apex Class Detail

EditDeleteDownloadRun TestShow Dependencies

Name	TrainingProgramTriggerTest	Status	Active
Namespace Prefix		Created By	MADUTHA SPHOORTHY , 25/10/2024, 10:25 pm
Last Modified By	MADUTHA SPHOORTHY , 26/10/2024, 11:36 pm		

Class BodyClass SummaryVersion SettingsTrace Flags

```
1  @isTest
2  public class TrainingProgramTriggerTest {
3      @isTest
4      static void testTrigger() {
5          Training_Program__c testProgram = new Training_Program__c();
6          testProgram.Name = 'Test Program';
7          testProgram.Approval_Status__c = 'Draft';
8          insert testProgram;
9          Training_Program__c insertedProgram = [SELECT Id, Approval_Status__c FROM Training_Program__c WHERE Id = :testProgram.Id];
10         System.assertEquals('Pending Approval', insertedProgram.Approval_Status__c, 'The status should be set to Pending Approval');
11     }
12 }
```

```
1  @isTest
2  public class TrainingProgramTriggerTest {
3      @isTest
4      static void testTrigger() {
5          Training_Program__c testProgram = new Training_Program__c();
6          testProgram.Name = 'Test Program';
7          testProgram.Approval_Status__c = 'Draft';
8          insert testProgram;
9          Training_Program__c insertedProgram = [SELECT Id, Approval_Status__c FROM Training_Program__c WHERE Id = :testProgram.Id];
10         System.assertEquals('Pending Approval', insertedProgram.Approval_Status__c, 'The status should be set to Pending Approval');
11     }
12 }
```

Logs	Tests	Checkpoints	Query Editor	View State	Progress	Problems				
User	Application	Operation	Time	Status	Read	Size				
MADUTHA SPHOORTHY	Unknown	/services/data/v62.0/tooling/runTests...	10/26/2024, 11:38:38 PM	Success	Unread	6.54 KB				

```
@isTest
public class TrainingProgramApprovalTriggerTest {
    @isTest
    static void testApprovalStatus() {
        // Create a test training program
        Training_Program__c testProgram = new Training_Program__c();
        testProgram.Name = 'Test Program';
        testProgram.Approval_Request__c = false;
        insert testProgram;

        // Update the program to mark it as approved
        testProgram.Approval_Request__c = true;
        update testProgram;

        // Retrieve the updated record
        Training_Program__c updatedProgram = [SELECT Id, Approval_Status__c FROM Training_Program__c WHERE Id = :testProgram.Id];

        // Assert that the approval status is set correctly
        System.assertEquals('Approved', updatedProgram.Approval_Status__c, 'The approval status should be set to Approved');
    }
}
```

Overall Code Coverage			>>
Class	Percent	Lines	
Overall	100%		
TrainingProgramApprovalTrigger	100%	5/5	
TrainingProgramTrigger	100%	2/2	

Apex Trigger

TrainingProgramApprovalTrigger

Help for this Page

« Back to List Apex Triggers

Apex Trigger Detail

Edit

Delete

Download

Show Dependencies

Name	TrainingProgramApprovalTrigger	sObject Type	Training Program
Code Coverage	100% (5/5)	Status	Active
Created By	MADUTHA SPHOORTHIL 25/10/2024, 10:47 pm	Last Modified By	MADUTHA SPHOORTHIL 26/10/2024, 11:42 pm
Namespace Prefix			

Apex Trigger

Version Settings

Trace Flags

```
1 trigger TrainingProgramApprovalTrigger on Training_Program__c (before update) {
2   for (Training_Program__c program : Trigger.new) {
3     if (program.Approval_Request__c == true) {
4       program.Approval_Status__c = 'Approved';
5     } else if (program.Approval_Request__c == false && program.Approval_Status__c != 'Rejected') {
6       program.Approval_Status__c = 'Pending';
7     }
8   }
9 }
```

Apex Trigger

TrainingProgramTrigger

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Apex Trigger Detail

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Name	TrainingProgramTrigger	sObject Type	Training Program
Code Coverage	100% (2/2)	Status	Active
Created By	MADUTHA SPHOORTHIL 25/10/2024, 10:08 pm	Last Modified By	MADUTHA SPHOORTHIL 26/10/2024, 11:45 pm
Namespace Prefix			

Apex Trigger

Version Settings

Trace Flags

```
1 trigger TrainingProgramTrigger on Training_Program__c (before insert) {
2   for (Training_Program__c program : Trigger.new) {
3     program.Approval_Status__c = 'Pending Approval';
4   }
5 }
```



## **Key Scenarios Addressed by Salesforce in the Project:**

- Corporate Client Training Management:
  - Clients can easily book training programs for their employees and track their progress.
  
- Feedback Collection:
  - Employees can provide feedback after training, helping the institute improve program quality.
  
- Appointment Scheduling:
  - Clients can schedule training sessions for employees, assign trainers, and track attendance.

## **Conclusion**

Through this CRM, corporate clients can seamlessly manage their employee training programs. The project automates key tasks such as session scheduling, employee enrollment, and feedback collection. Additionally, the CRM provides insights into employee progress, trainer effectiveness, and overall client satisfaction.