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:

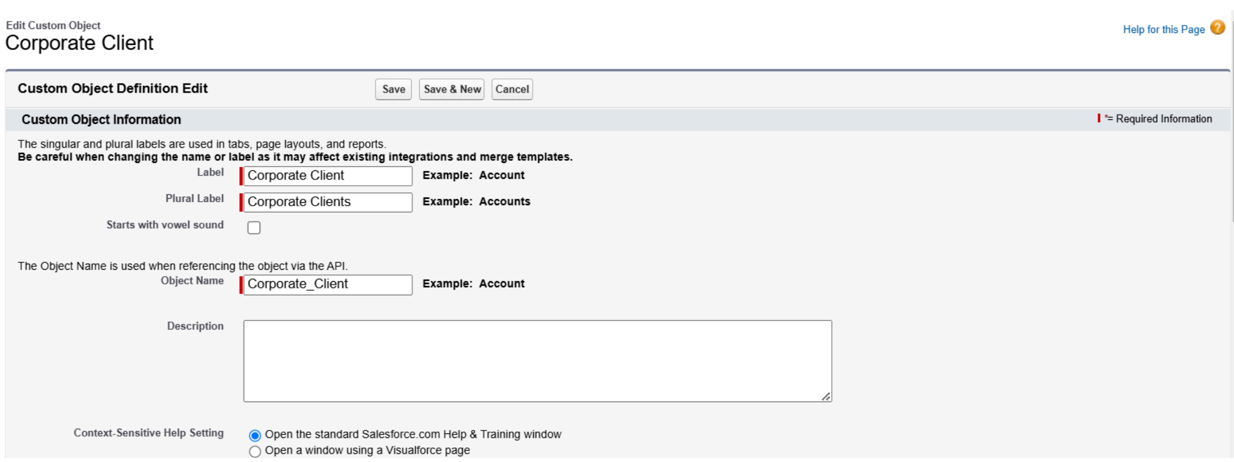
> **Custom Objects**: Corporate Clients, Employees, Training Programs, Appointments, Feedback.
> **Screen Flows**: For training program enrollment, employee registration, and feedback submission.
> **Approval Process**: For handling custom training requests from corporate clients.
> **Lightning App Builder**: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

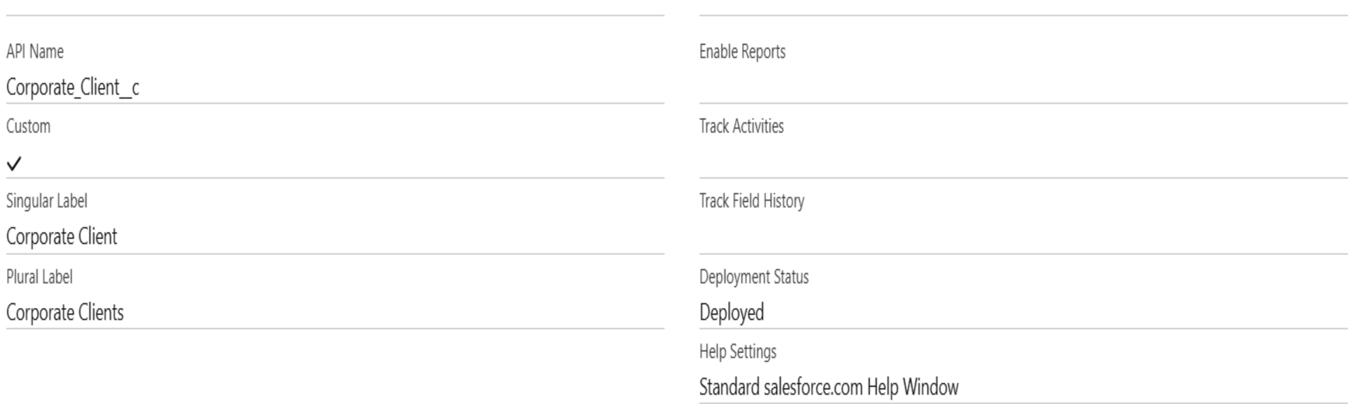
> **Validation Rules**: To ensure data accuracy (e.g., valid email formats, session date checks).
> **Reports and Dashboards**: To provide real-time insights into training effectiveness and client satisfaction.

Detailed Steps to Solution Design:

>> Data Model:

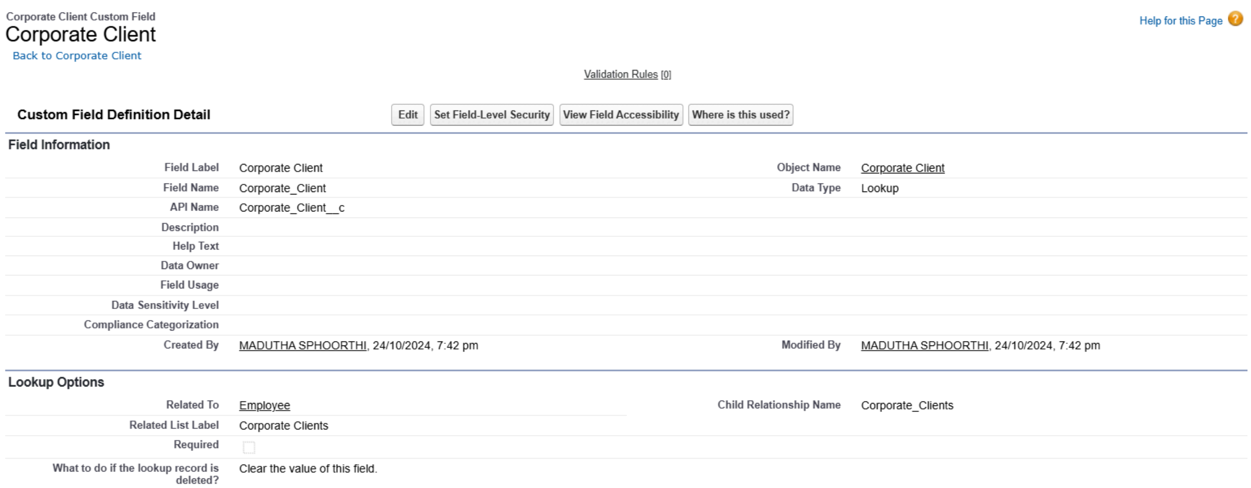
Corporate Client Object:



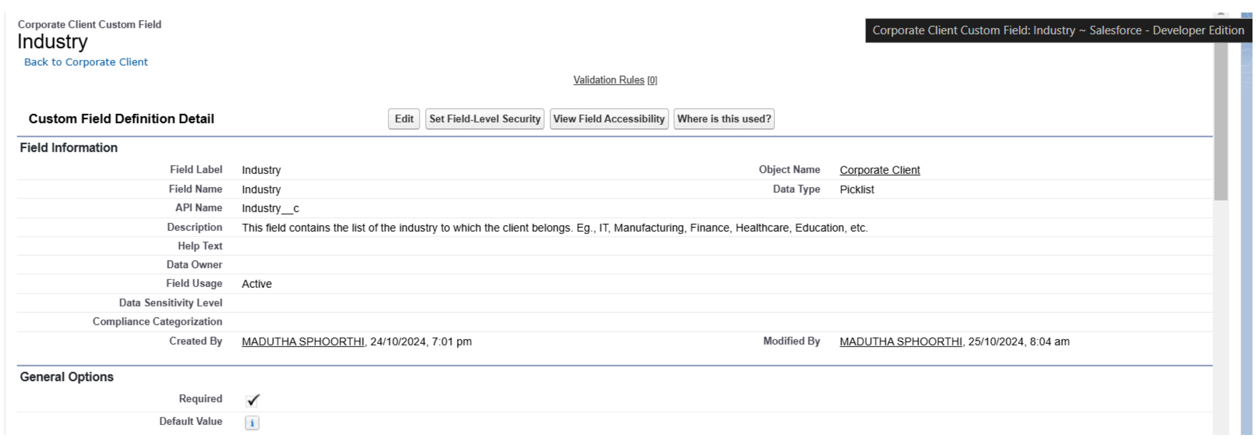


Fields for Corporate Client:

1. Company Name (Text, Required)



2. Industry (Picklist, Required)



Values

New | Reorder | Replace | Printable View | Chart Colors ▼
Delete Selected | Deactivate Selected | Replace Selected

Values Help

Action	Values	API Name	Default	Chart Colors	Modified By
Edit | Del | Deactivate	Construction	Construction	✓	Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:01 pm
Edit | Del | Deactivate	Education	Education		Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:01 pm
Edit | Del | Deactivate	Finance	Finance		Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:01 pm
Edit | Del | Deactivate	Healthcare	Healthcare		Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:01 pm
Edit | Del | Deactivate	IT	IT		Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:01 pm
Edit | Del | Deactivate	Manufacturing	Manufacturing		Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:01 pm
Edit | Del | Deactivate	Other	Other		Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:01 pm
Edit | Del | Deactivate	Real Estate	Real Estate		Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:01 pm
Edit | Del | Deactivate	Retail	Retail		Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:01 pm
Edit | Del | Deactivate	Telecommunications	Telecommunications		Assigned dynamically	MADUTHA SPHOORTHI, 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 SPHOORTHI, 24/10/2024, 7:04 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:04 pm

General Options

Required	✓
Unique	✓
External ID	
AI Prediction	
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?

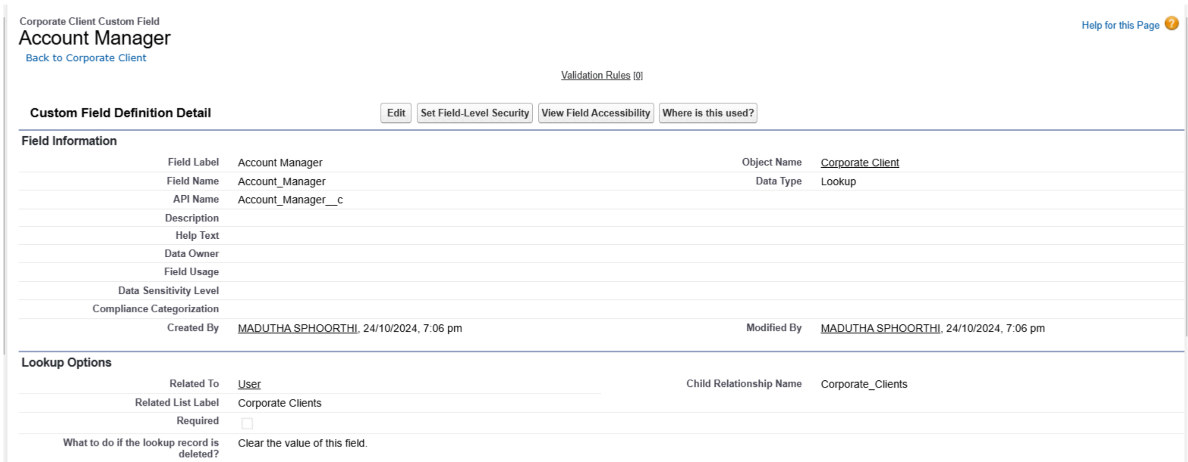
Field Information

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 SPHOORTHI, 24/10/2024, 7:05 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:05 pm

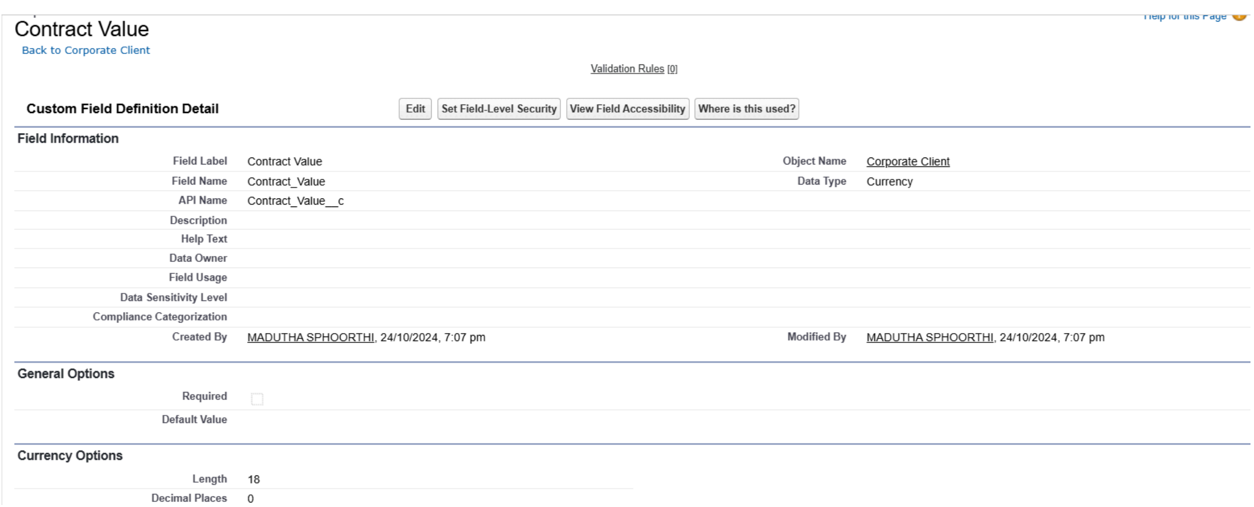
Lookup Options

Related To	Contact	Child Relationship Name	Corporate_Clients
Related List Label	Corporate Clients		
Required			
What to do if the lookup record is deleted?	Clear the value of this field.		

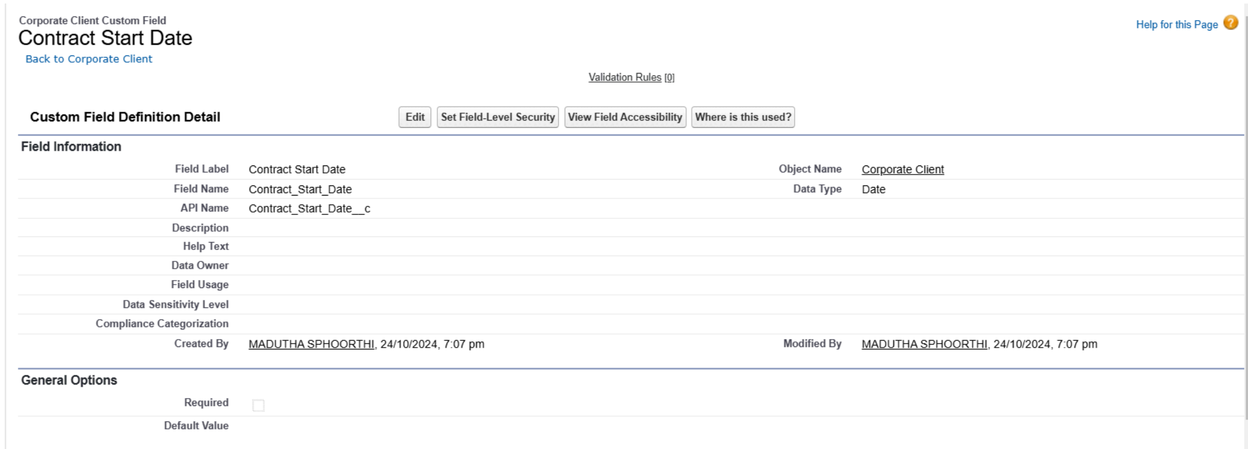
5. Account Manager (Lookup → User)



6. Contract Value (Currency)



7. Contract Start Date (Date)



Corporate Client Custom Field
Contract Start Date
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?

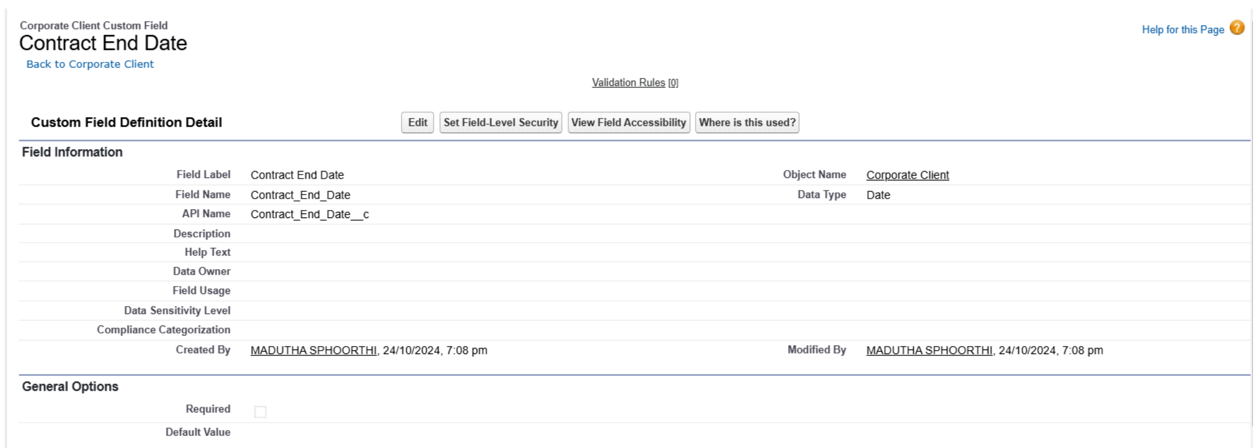
Field Information

Field Label	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 SPHOORTHI, 24/10/2024, 7:07 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:07 pm

General Options

Required	
Default Value	

8. Contract End Date (Date)



Corporate Client Custom Field
Contract End Date
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?

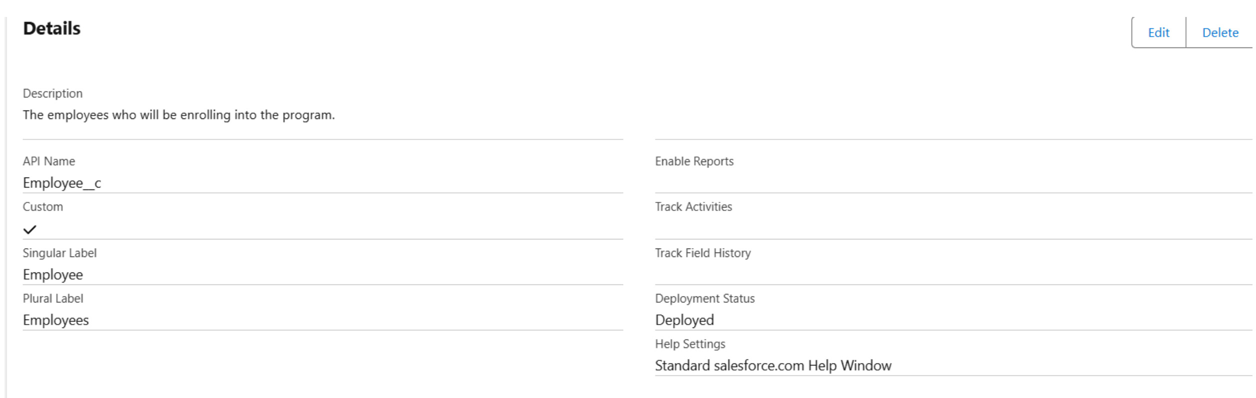
Field Information

Field Label	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 SPHOORTHI, 24/10/2024, 7:08 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:08 pm

General Options

Required	
Default Value	

Object 2: Employee



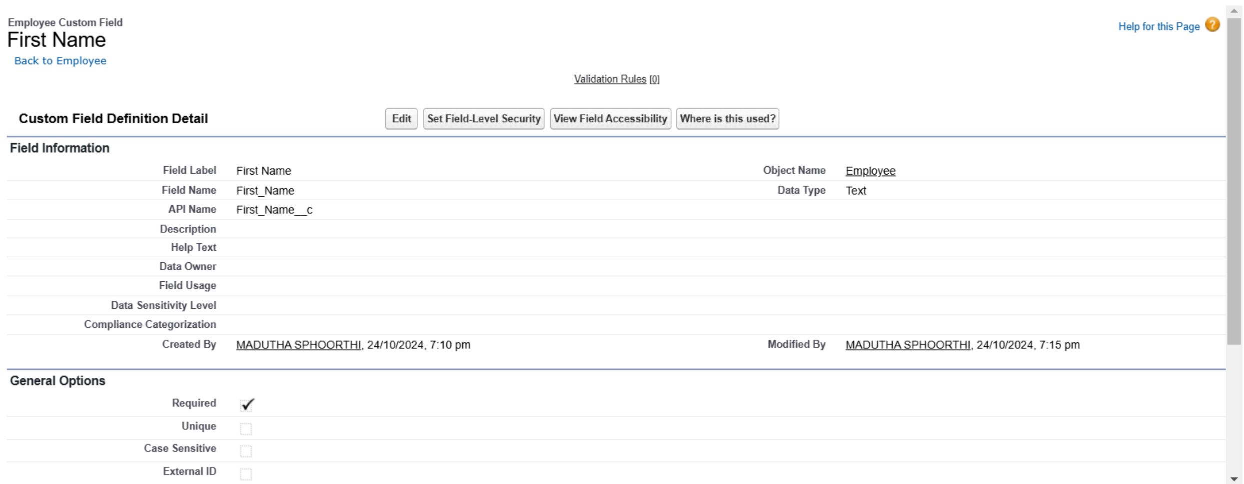
Details Edit | Delete

Description
The employees who will be enrolling into the program.

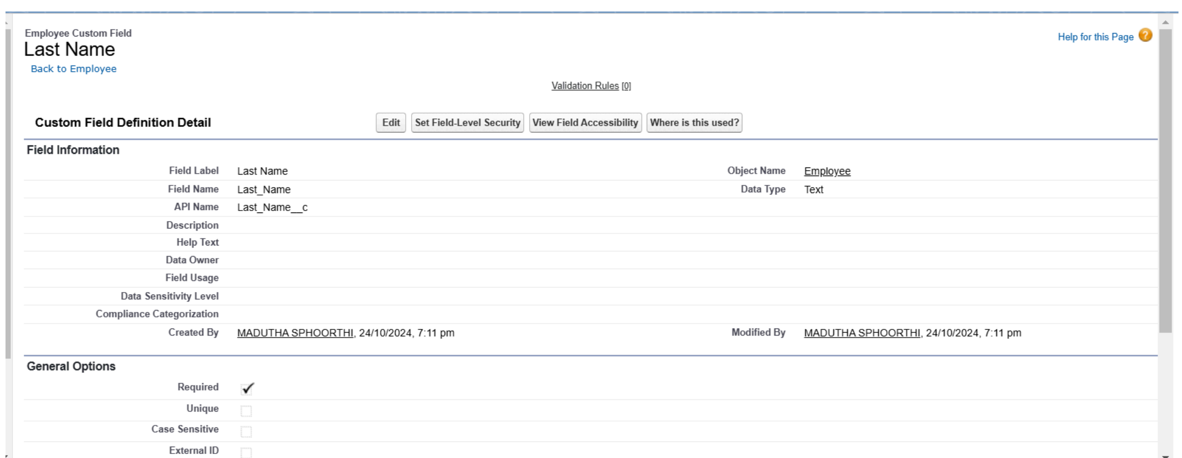
API Name: Employee__c	Enable Reports
Custom: ✓	Track Activities
Singular Label: Employee	Track Field History
Plural Label: Employees	Deployment Status: Deployed
	Help Settings: Standard salesforce.com Help Window

Fields for Employee:

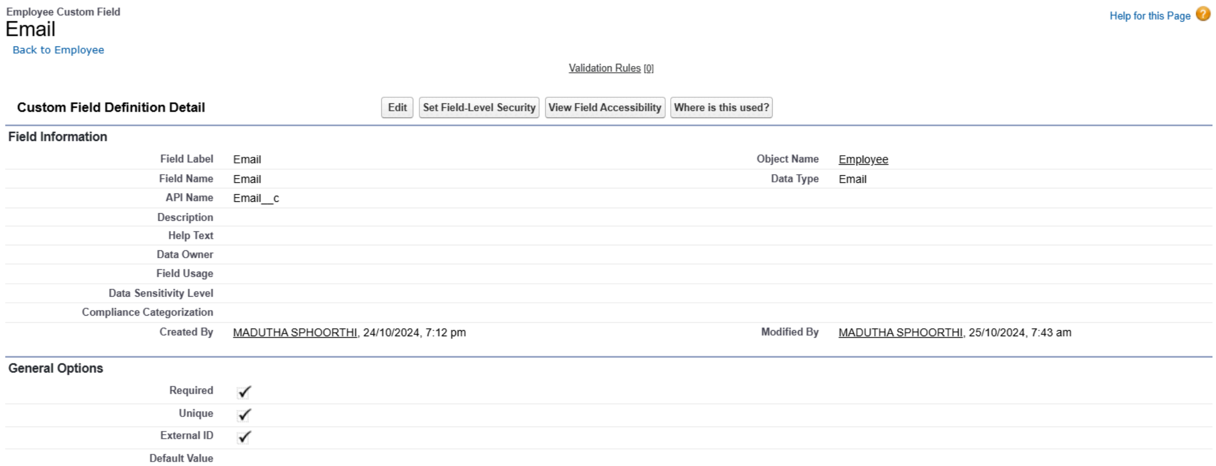
1. First Name (Text)



2. Last Name (Text)



3. Email (Email)


Employee Custom Field
Email
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?

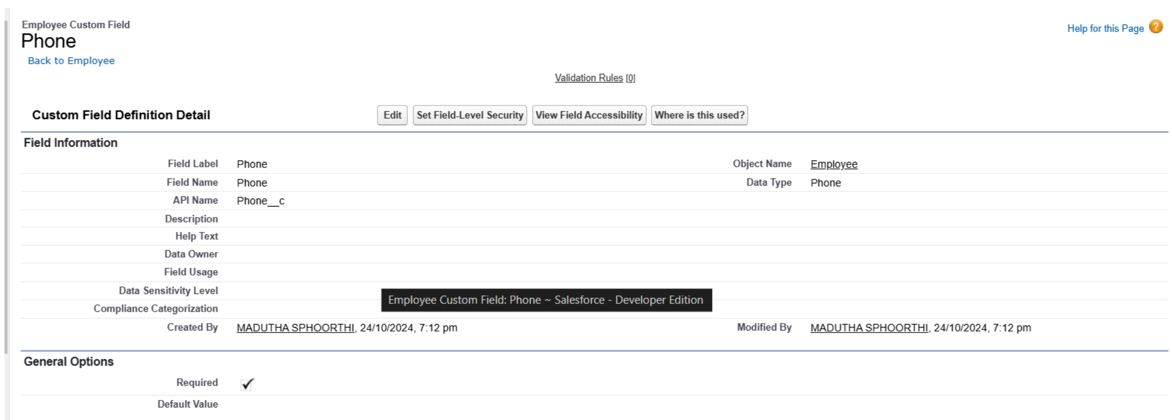
Field Information

Field Label	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 SPHOORTHI, 24/10/2024, 7:12 pm	Modified By	MADUTHA SPHOORTHI, 25/10/2024, 7:43 am

General Options

Required	✓
Unique	✓
External ID	✓
Default Value	

4. Phone (Phone)


Employee Custom Field
Phone
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

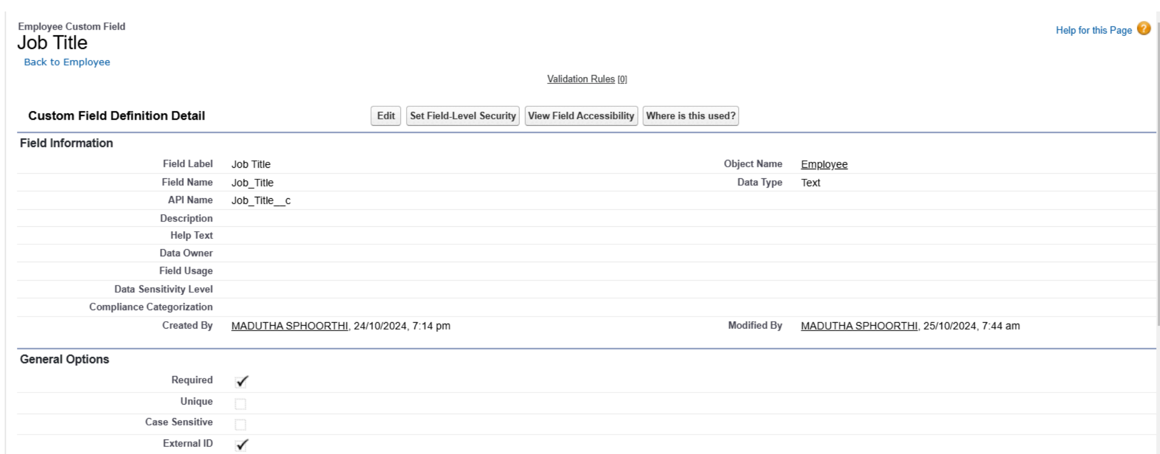
Field Label	Phone	Object Name	Employee
Field Name	Phone	Data Type	Phone
API Name	Phone__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHI, 24/10/2024, 7:12 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:12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

Employee Custom Field: Phone ~ Salesforce - Developer Edition

General Options

Required	✓
Default Value	

5. Job Title (Text)


Employee Custom Field
Job Title
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?

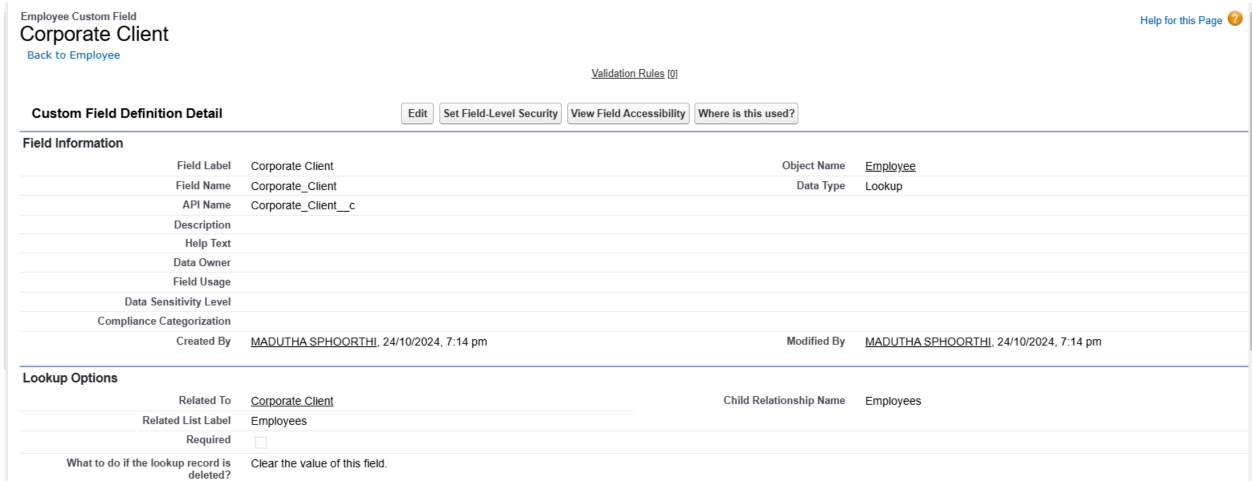
Field Information

Field Label	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 SPHOORTHI, 24/10/2024, 7:14 pm	Modified By	MADUTHA SPHOORTHI, 25/10/2024, 7:44 am

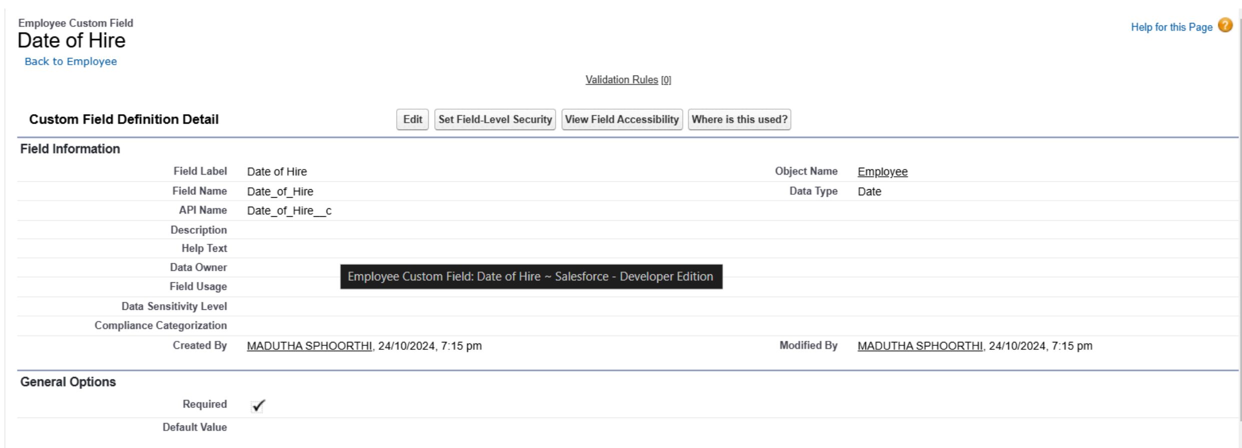
General Options

Required	✓
Unique	
Case Sensitive	
External ID	✓

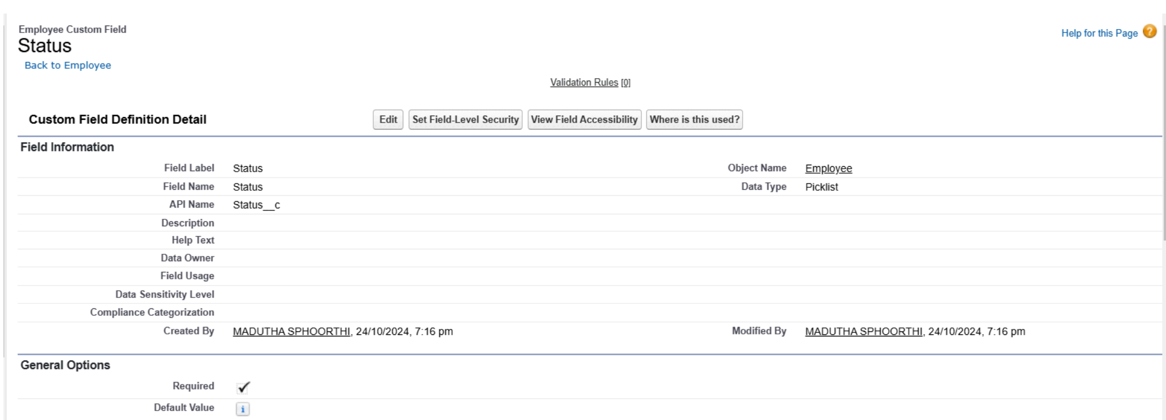
6. Corporate Client (Lookup → Corporate Client)

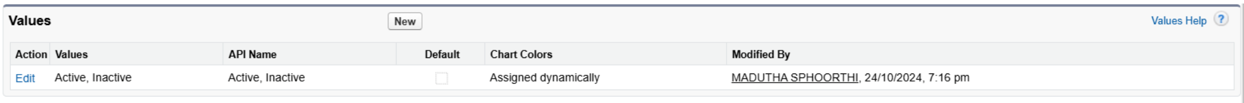


7. Date of Hire (Date)



8. Status (Picklist: Active, Inactive)

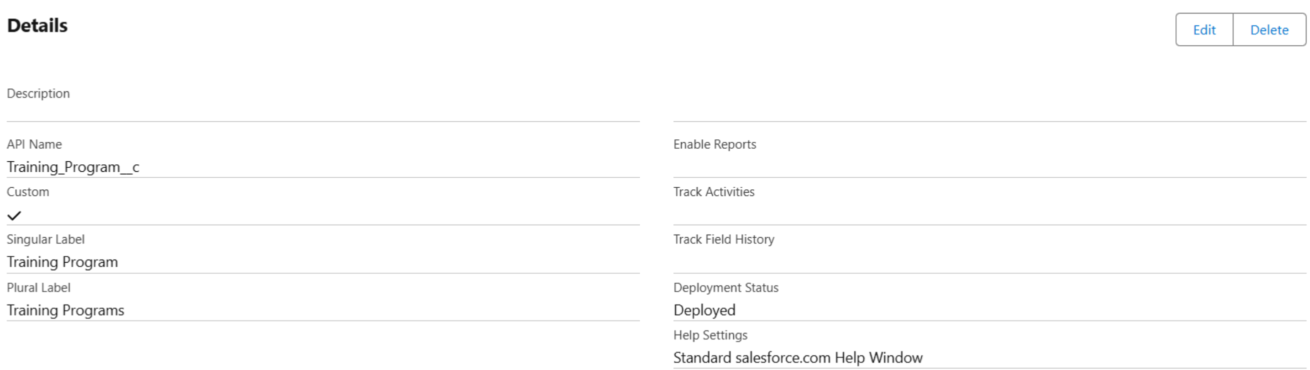




Values New — Values Help

Action	Values	API Name	Default	Chart Colors	Modified By
Edit	Active, Inactive	Active, Inactive		Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:16 pm

Object 3: Training Program



Details Edit Delete

Description	
API Name: Training_Program__c	Enable Reports
Custom: ✓	Track Activities
Singular Label: Training Program	Track Field History
Plural Label: Training Programs	Deployment Status: Deployed
	Help Settings: Standard salesforce.com Help Window

Fields for Training Program:

1. Course Duration

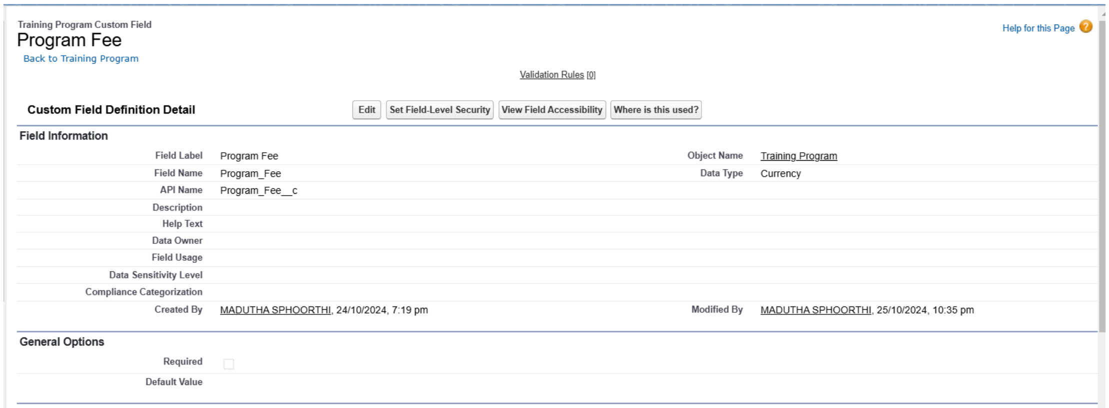
Training Program Custom Field
Course Duration
Back to Training Program
Help for this Page
Validation Rules [0]

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

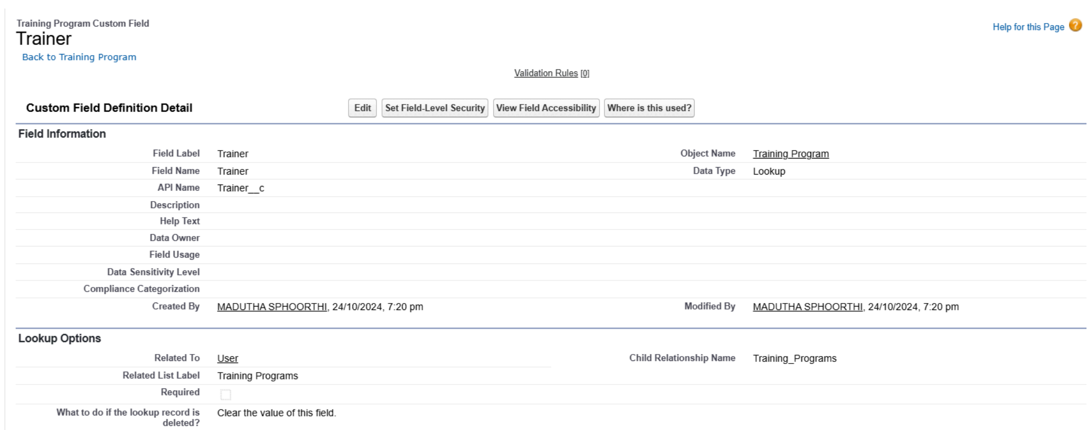
Field Information

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	MADUTHA SPHOORTHI, 24/10/2024, 7:19 pm	Modified By	MADUTHA SPHOORTHI, 25/10/2024, 10:34 pm

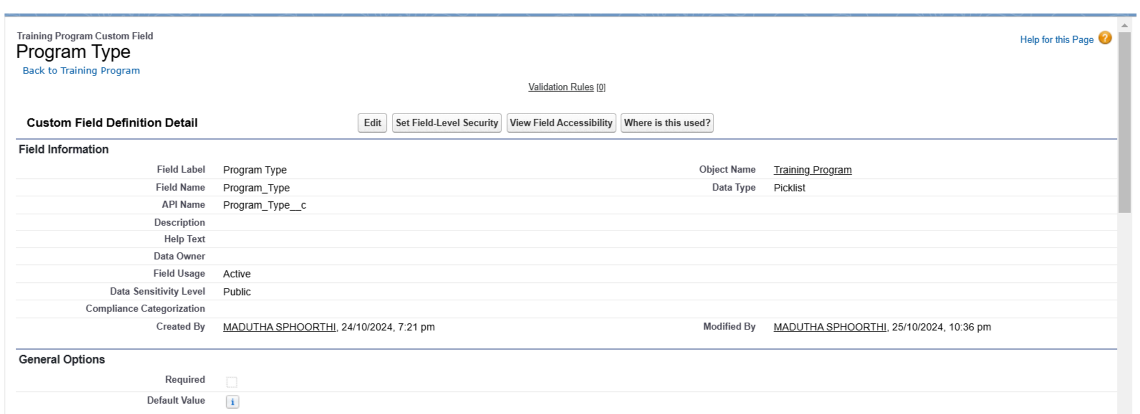
2. Program Fee (Currency)



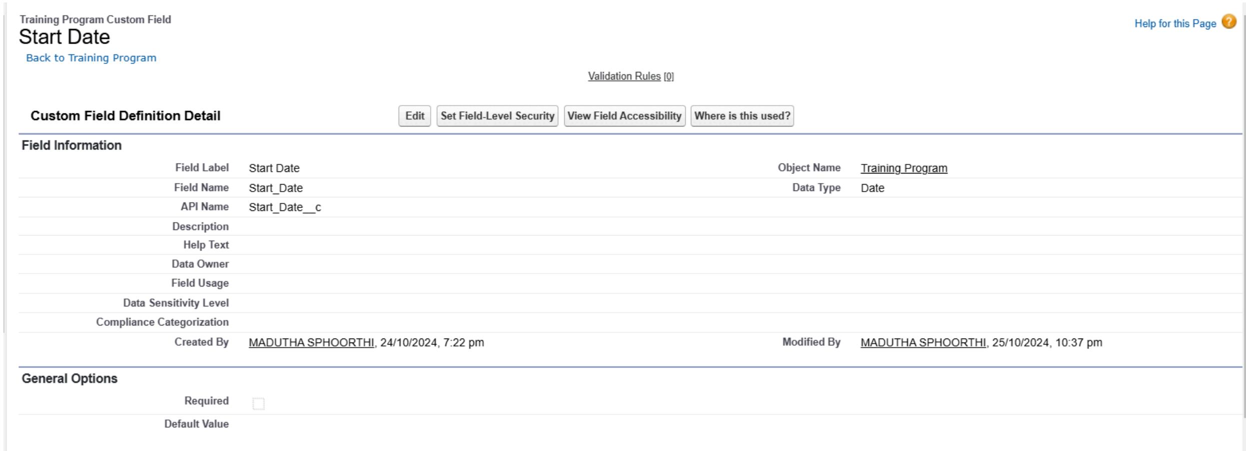
3. Trainer (Lookup → User)



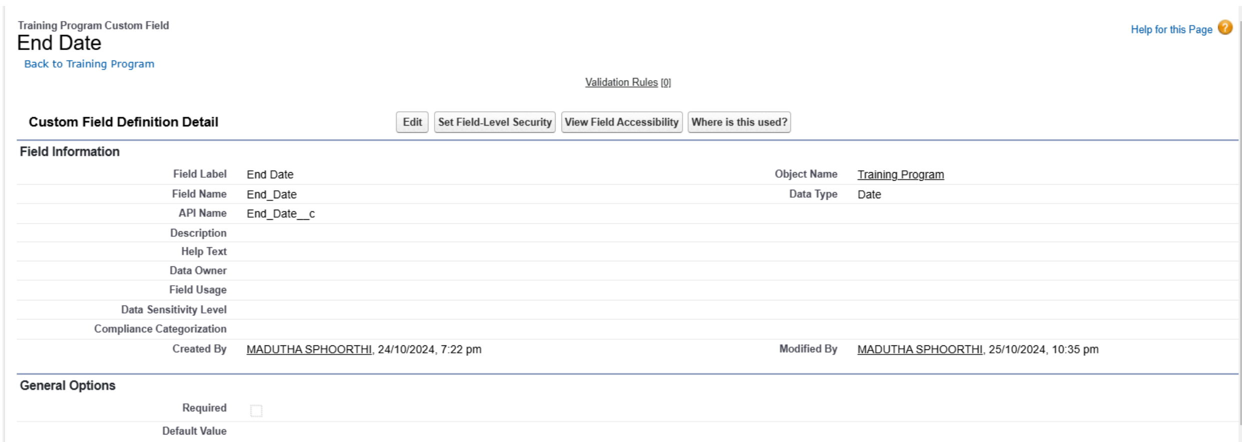
4. Program Type



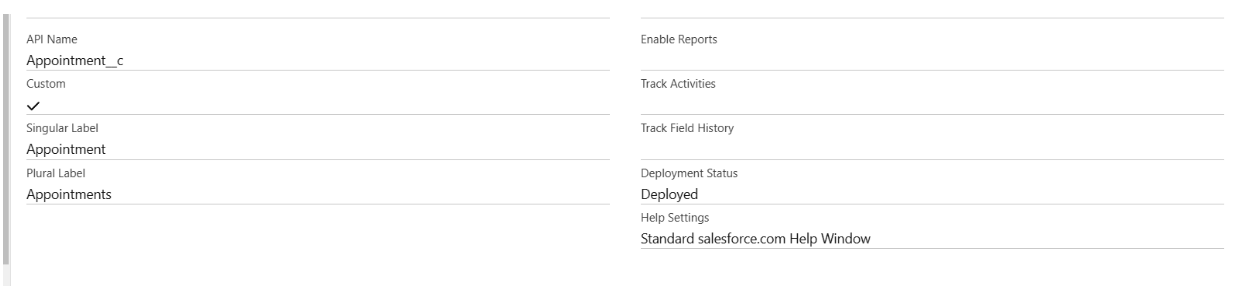
5. Start Date (Date)



6. End Date (Date)

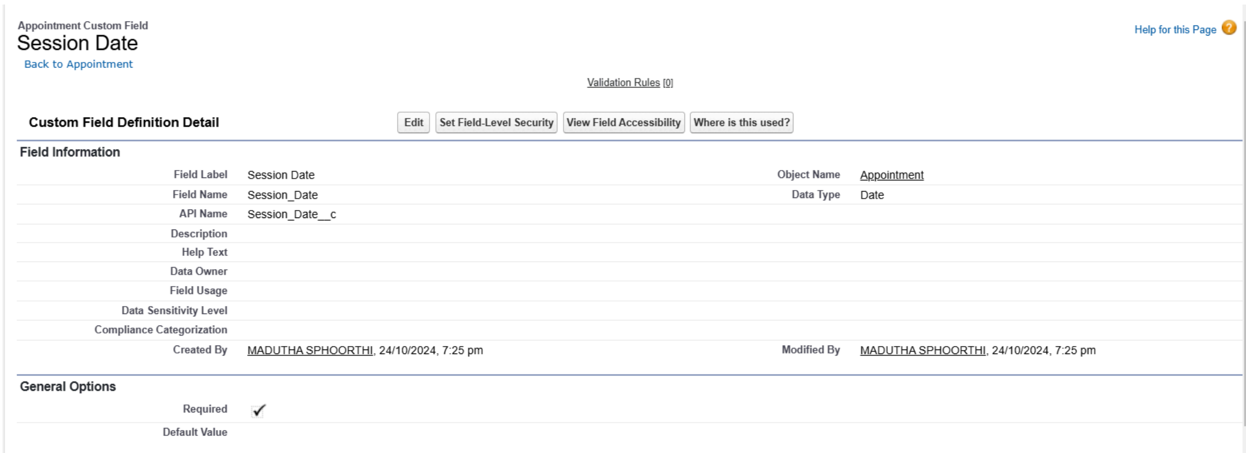


Object 4: Appointment (Training Session)

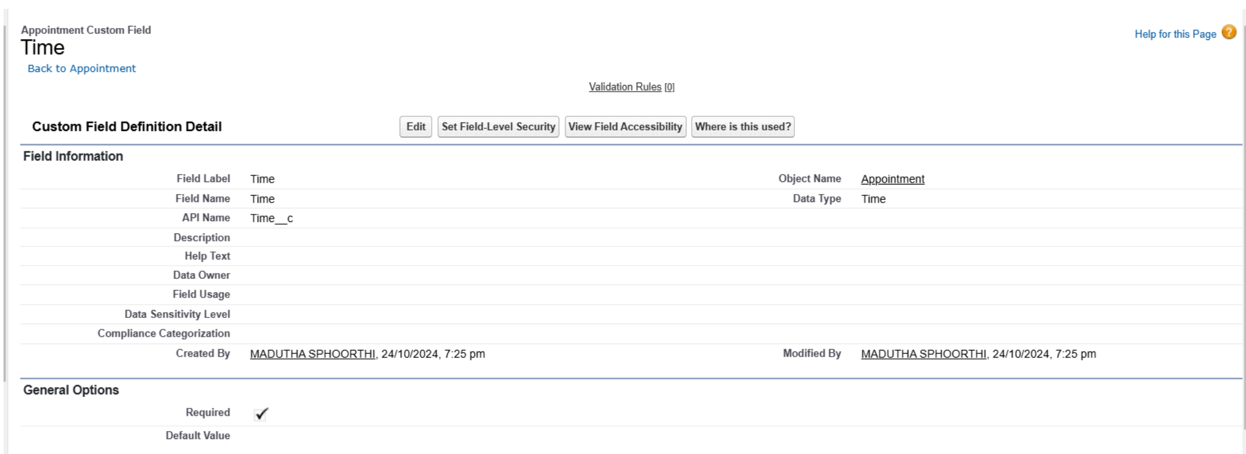


Fields for Appointment:

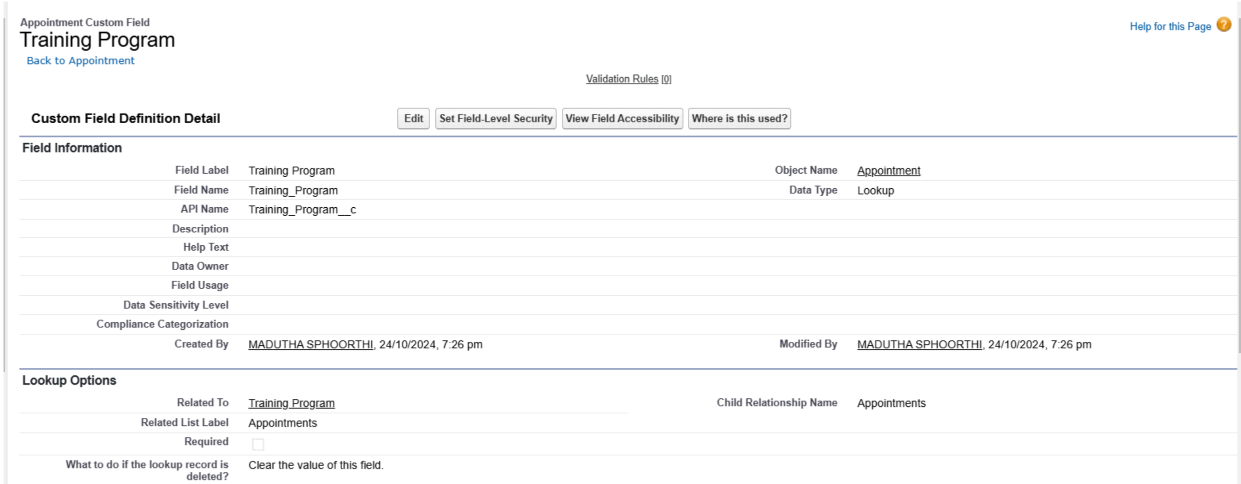
1. Session Date



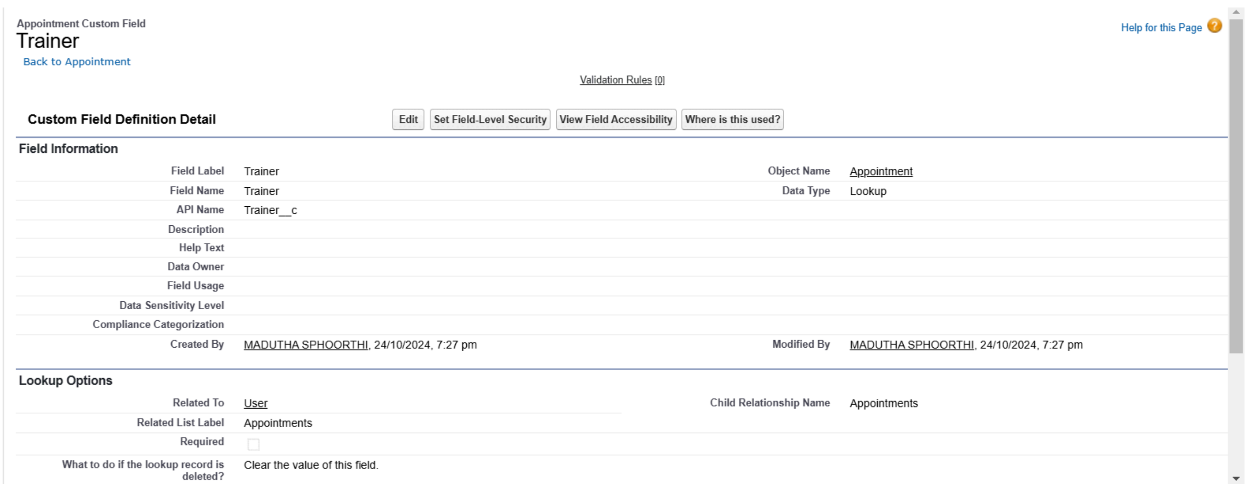
2. **Time**



3. Training Program (Lookup → Training Program)

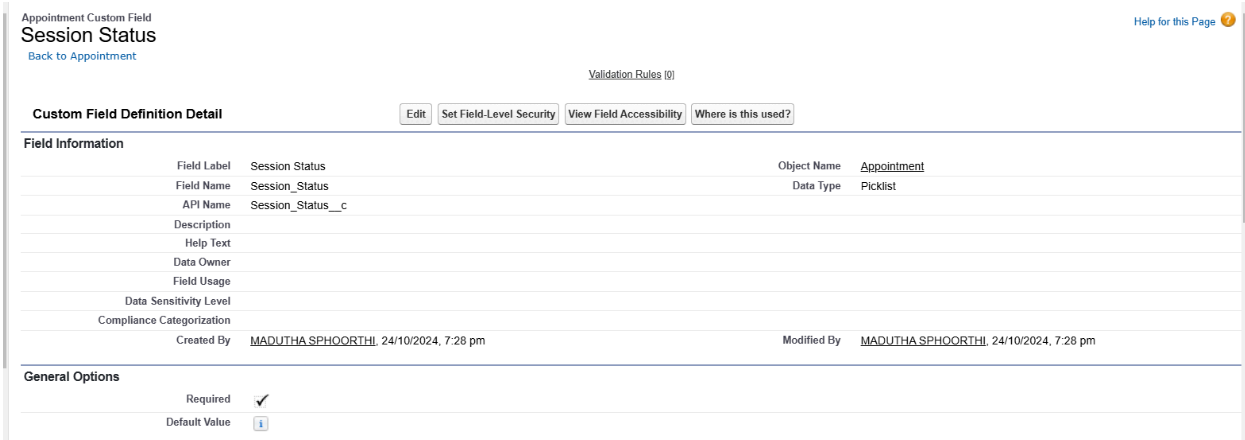


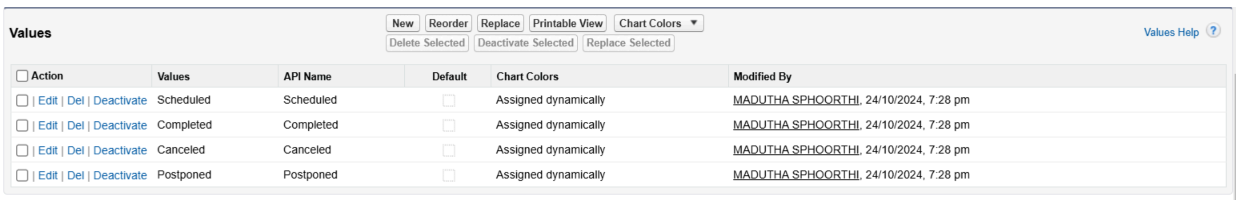
4. Trainer (Lookup → User)



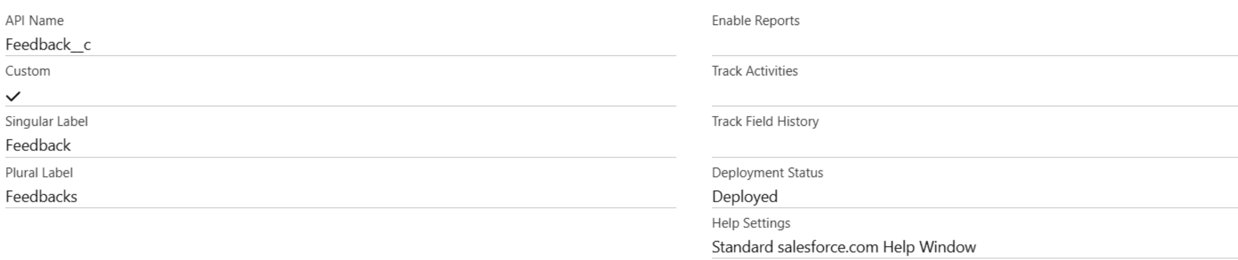
5. Employee (Lookup → Employee)

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



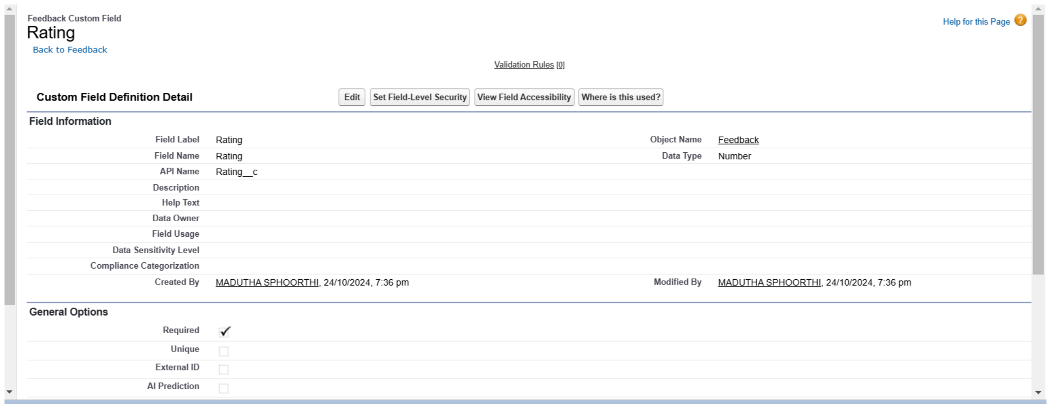


Object 5: Feedback

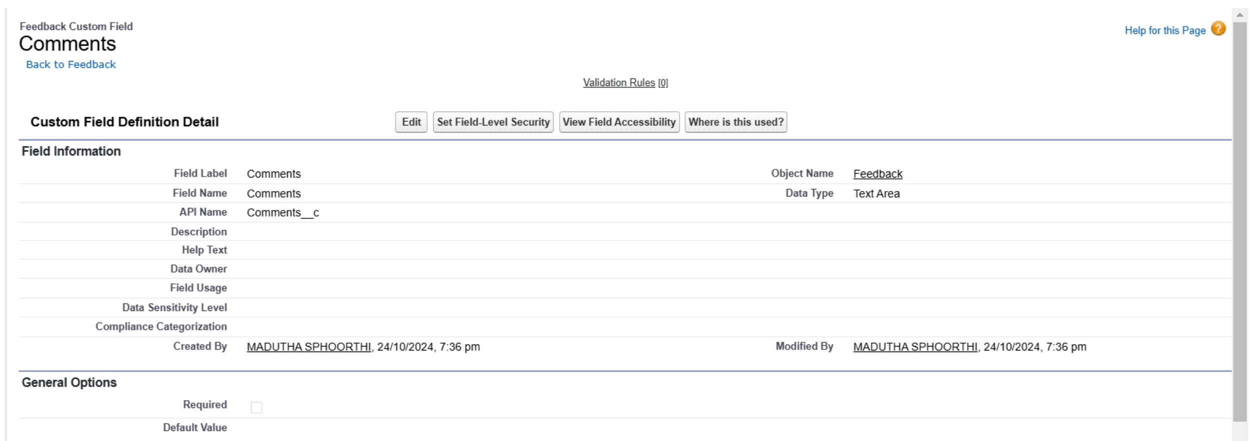


Fields for Feedback:

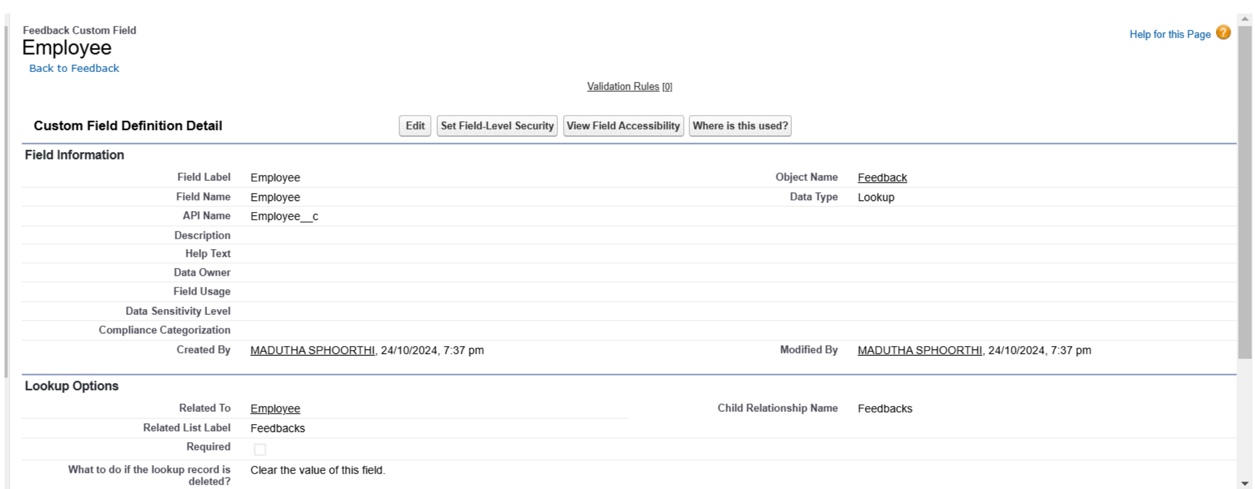
1. Rating (Number, 1-5)



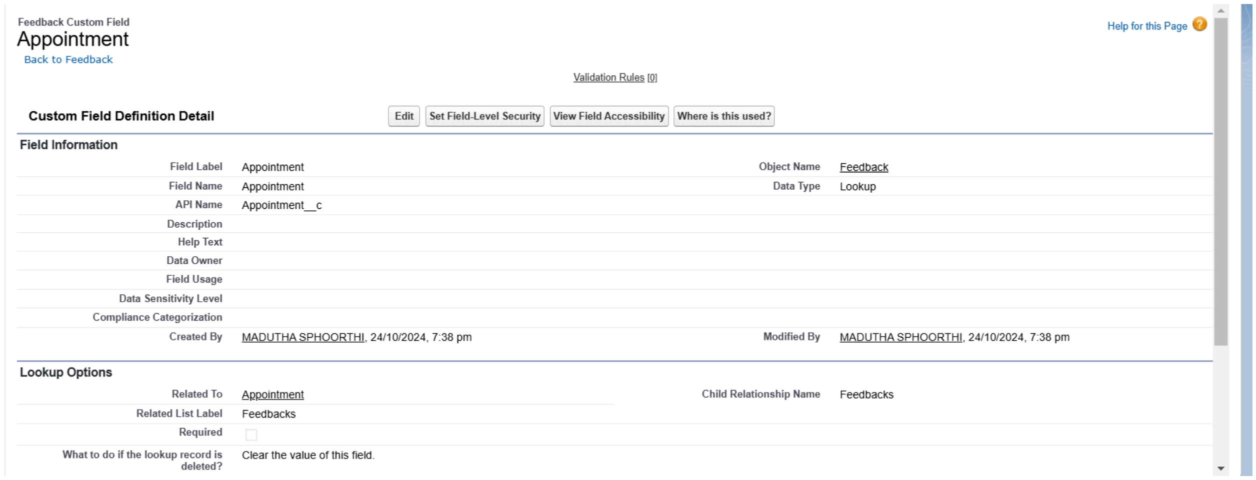
2. Comments (Text Area)



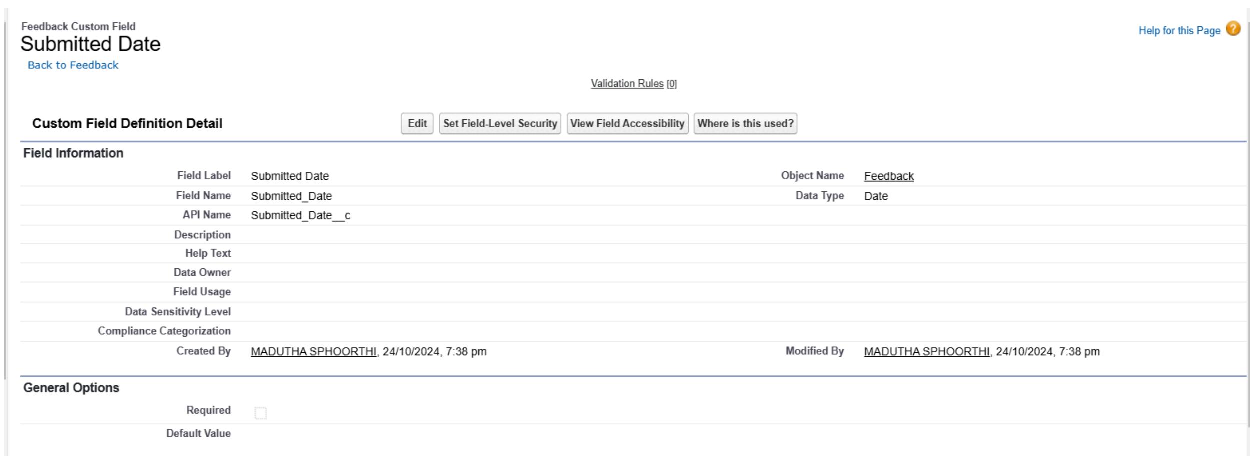
3. Employee (Lookup → Employee)



4. Appointment (Lookup → Appointment)



5. Submitted Date (Date)

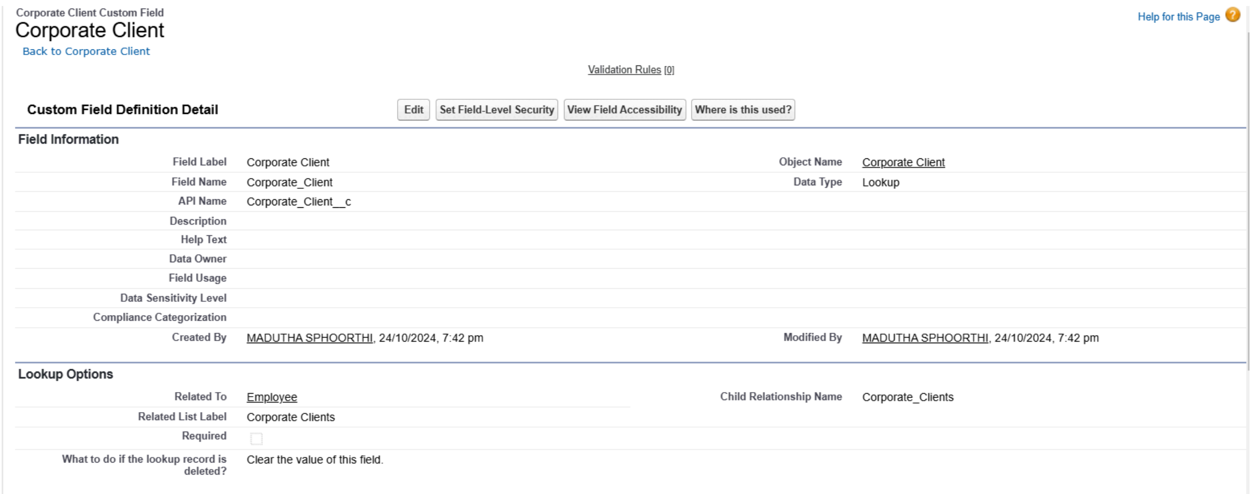


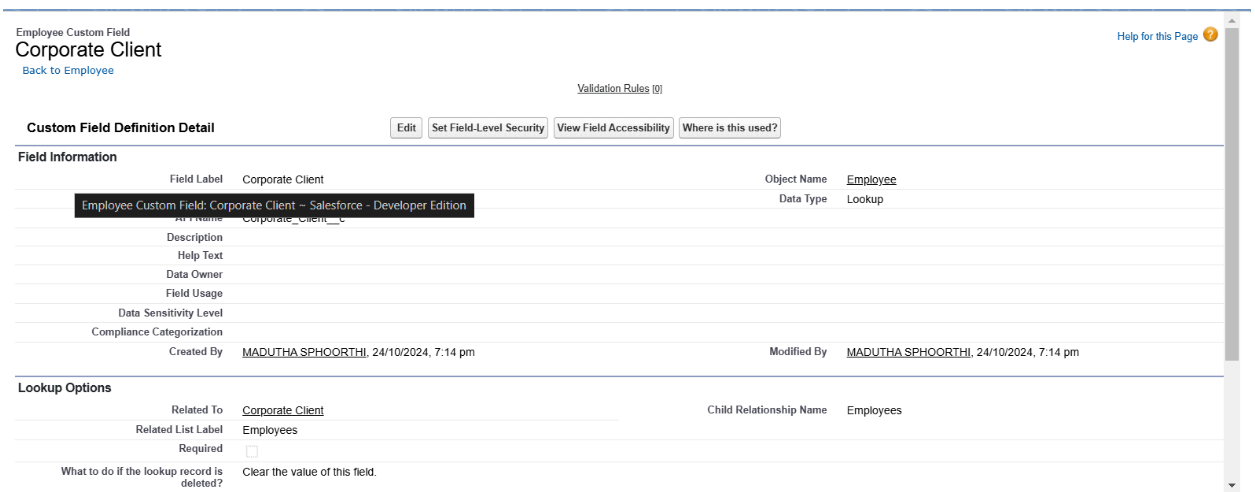
Define Relationships Between Objects

>Lookup Relationships

Corporate Client ↔ Employee:

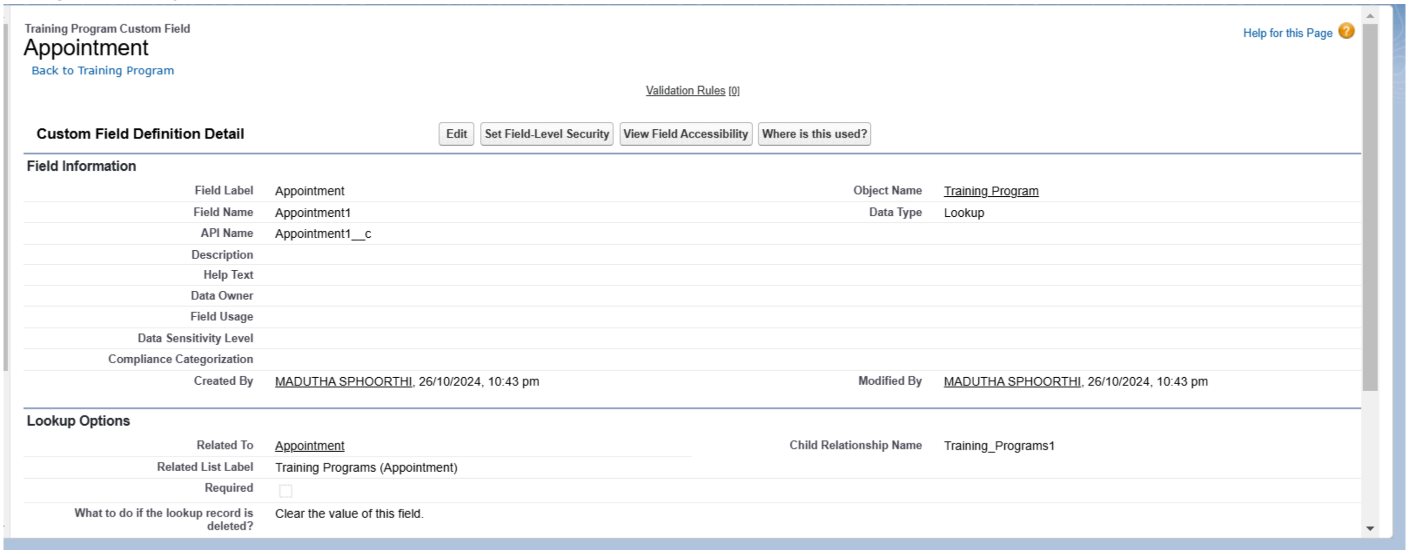
Lookup field on the Employee object that references the Corporate Client object.





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]

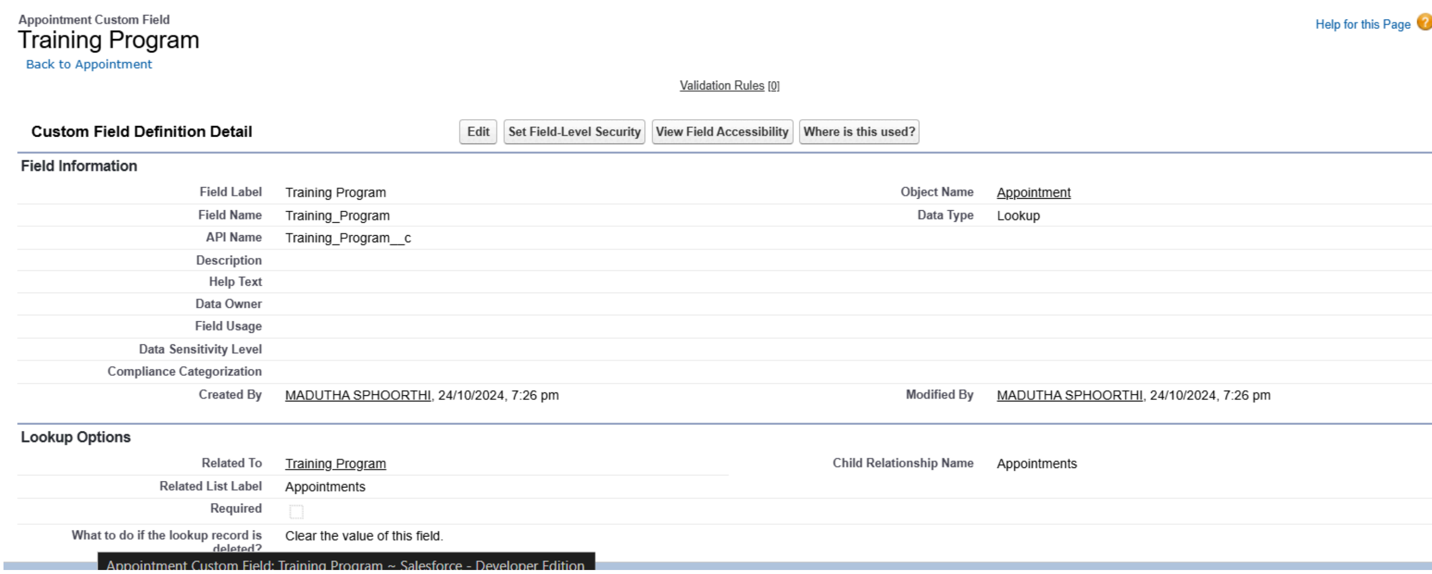
Custom Field Definition Detail Edit | Set Field-Level Security | View Field Accessibility | Where is this used?

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 SPHOORTHI, 26/10/2024, 10:43 pm	Modified By	MADUTHA SPHOORTHI, 26/10/2024, 10:43 pm

Lookup Options

Related To	Appointment	Child Relationship Name	Training_Programs1
Related List Label	Training Programs (Appointment)		
Required			
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

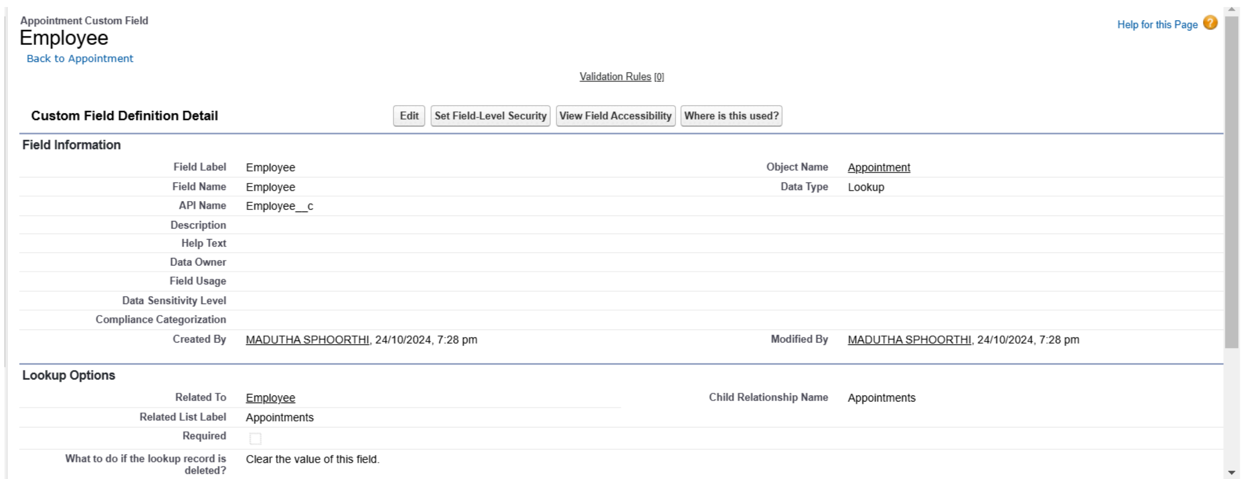
Field Label	Training Program	Object Name	Appointment
Field Name	Training_Program	Data Type	Lookup
API Name	Training_Program__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHI, 24/10/2024, 7:26 pm	Modified By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

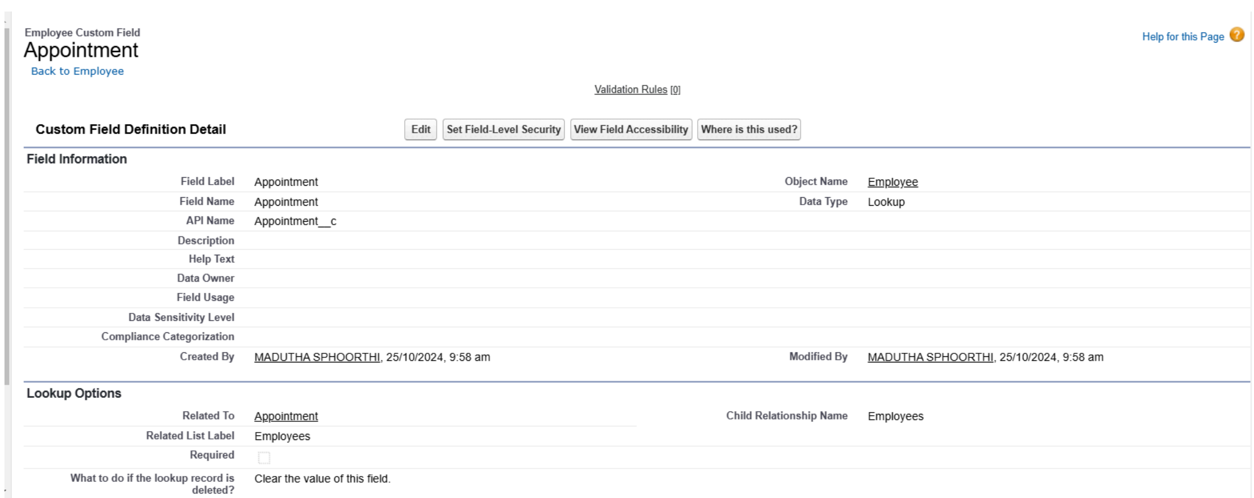
Lookup Options

Related To	Training Program	Child Relationship Name	Appointments
Related List Label	Appointments		
Required			
What to do if the lookup record is deleted?	Clear the value of this field.		

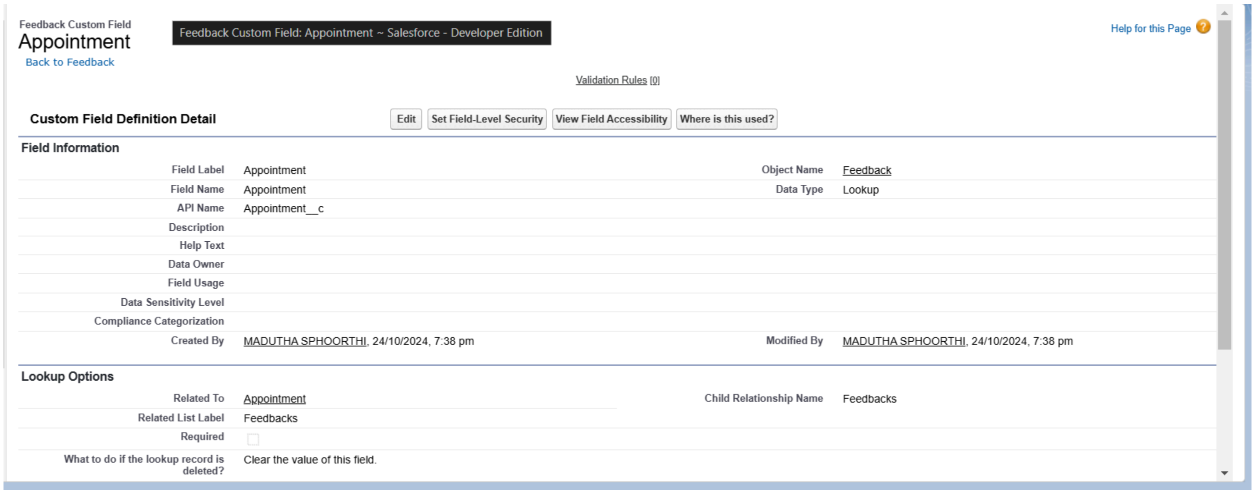
Appointment Custom Field: Training Program ~ Salesforce - Developer Edition

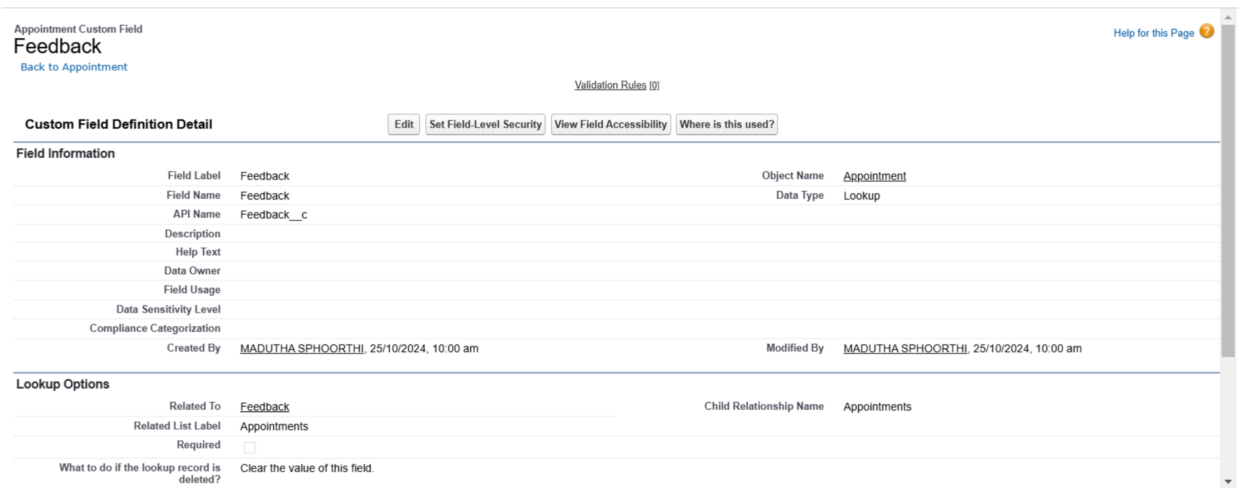
Employee ↔ Appointment:

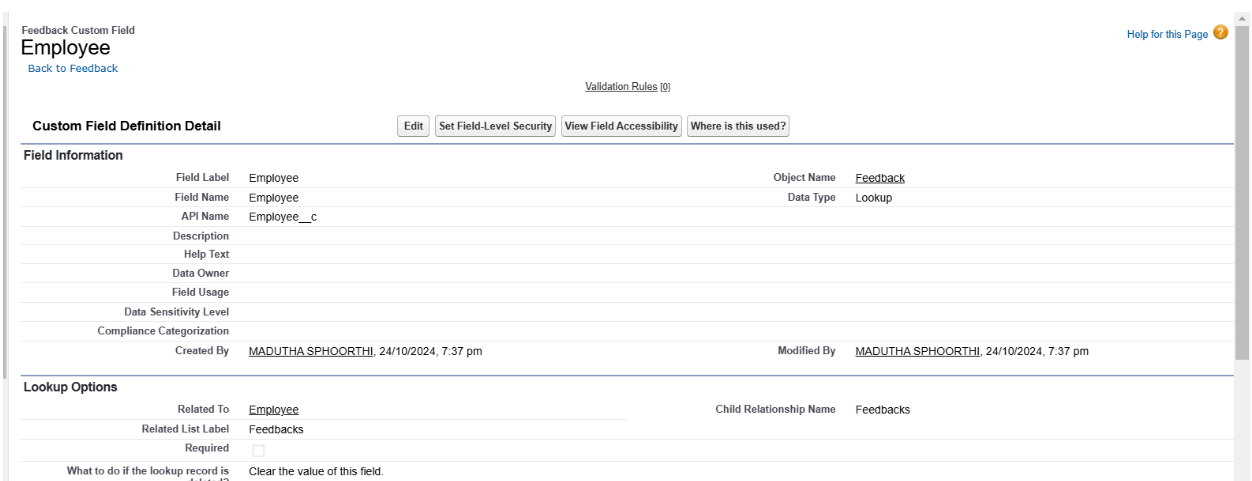




Feedback ↔ Appointment and Employee:



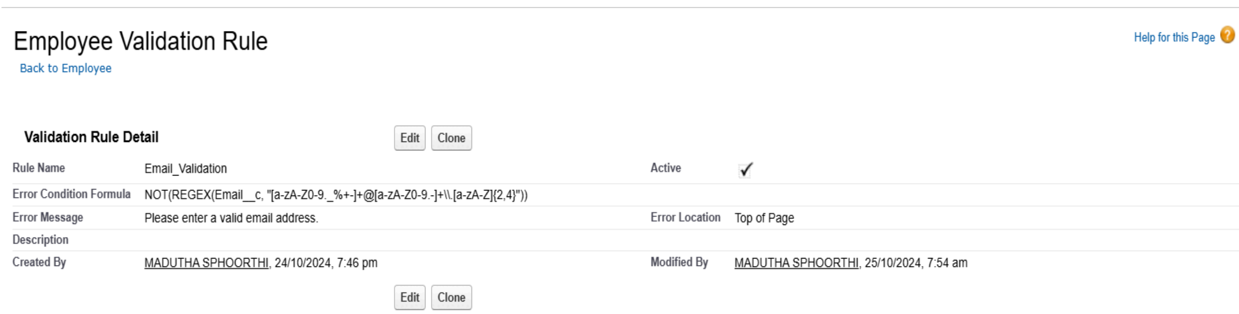




Validation Rules

>Email Validation (Employee Object):

This ensures that the email address is formatted correctly.



Employee Validation Rule

Back to Employee

Help for this Page

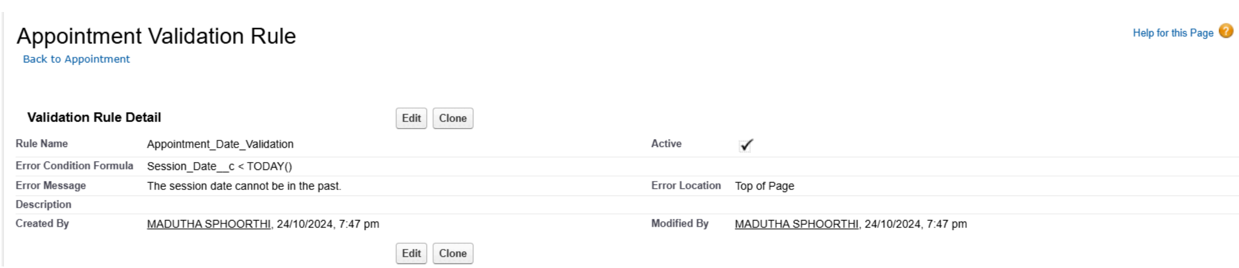
Validation Rule Detail Edit Clone

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 SPHOORTHI, 24/10/2024, 7:46 pm	Modified By	MADUTHA SPHOORTHI, 25/10/2024, 7:54 am

Edit Clone

>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

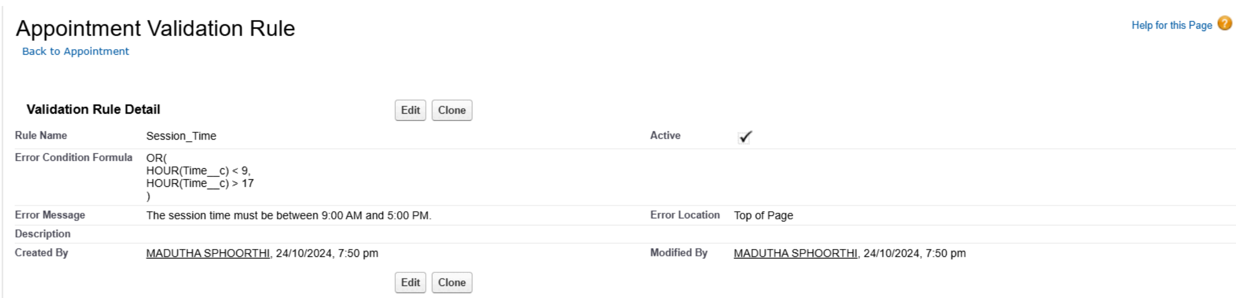
Validation Rule Detail Edit Clone

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 SPHOORTHI, 24/10/2024, 7:47 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:47 pm

Edit Clone

>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

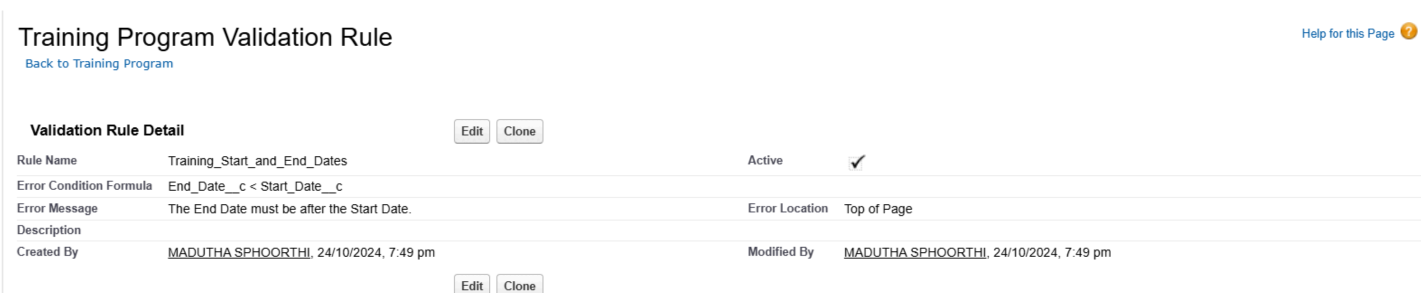
Validation Rule Detail Edit Clone

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 SPHOORTHI, 24/10/2024, 7:50 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:50 pm

Edit Clone

>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 Edit Clone

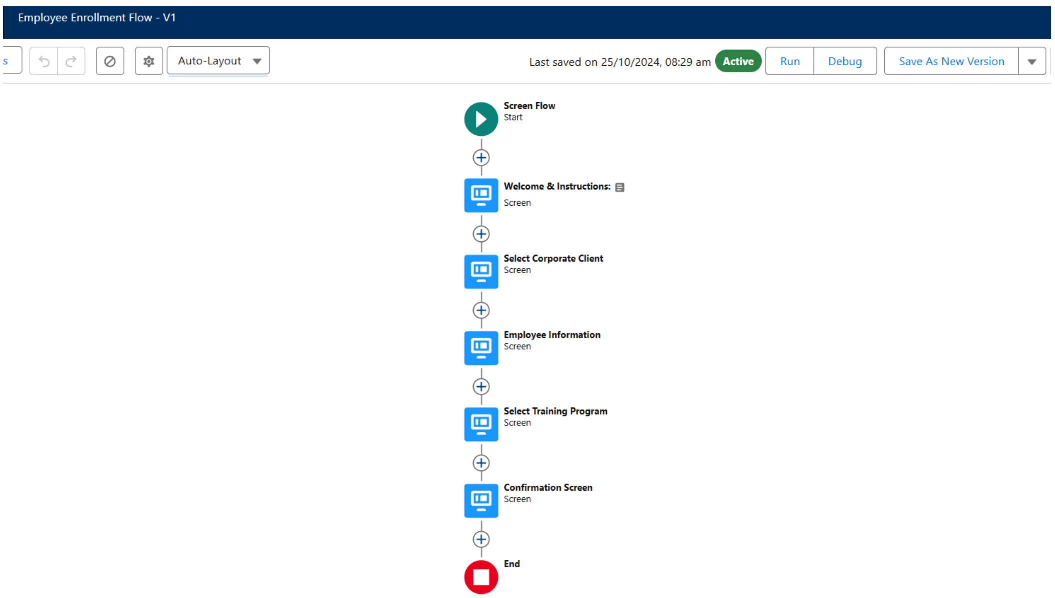
Rule Name	Training_Start_and_End_Dates	Active	✓
Error Condition Formula	End_Date__c < Start_Date__c		
Error Message	The End Date must be after the Start Date.	Error Location	Top of Page
Description			
Created By	MADUTHA SPHOORTHI, 24/10/2024, 7:49 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:49 pm

Edit Clone

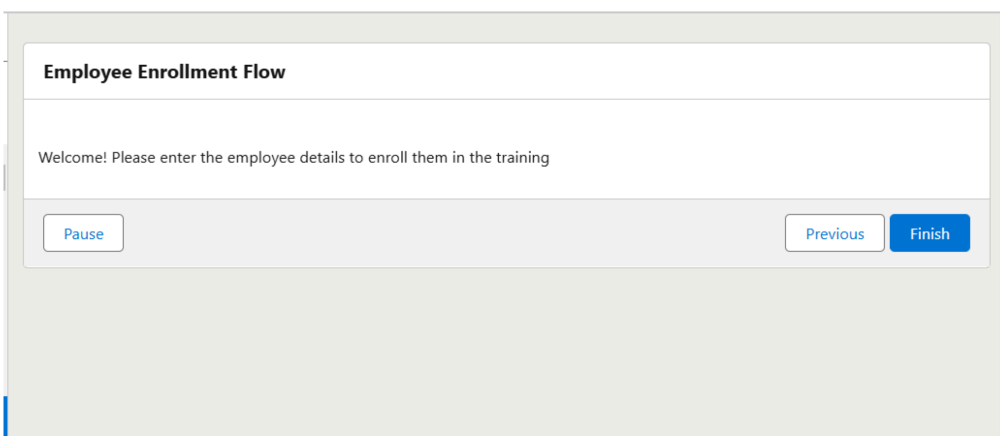
Key Screen Flows Application:

>Employee Enrollment Flow:

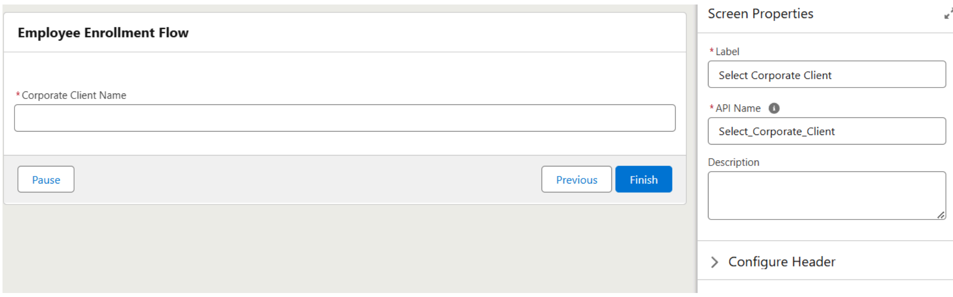
Allow corporate clients to enroll their employees in training programs using a guided flow that captures all necessary employee details.



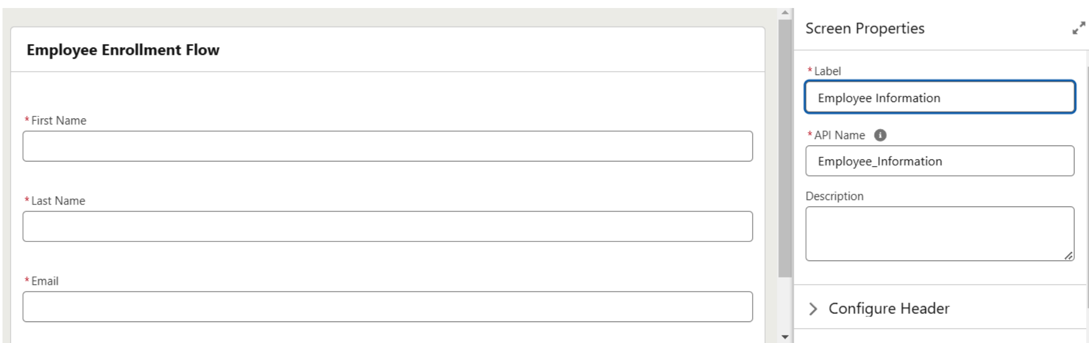
➔ Welcome



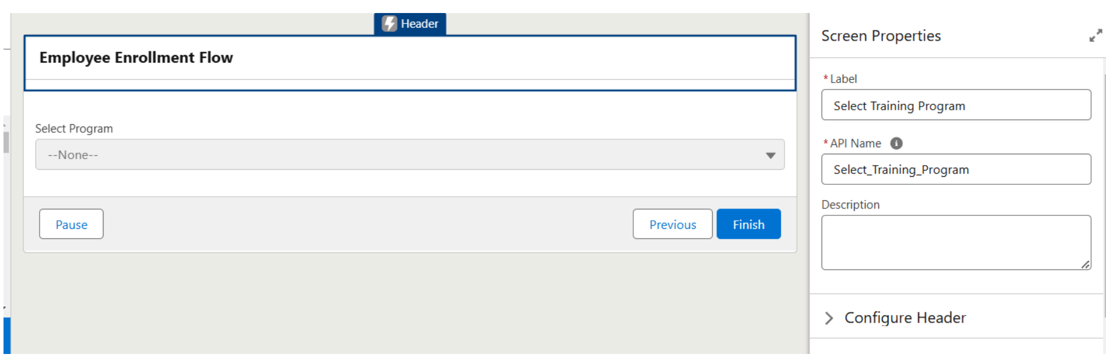
➔ Corporate Client



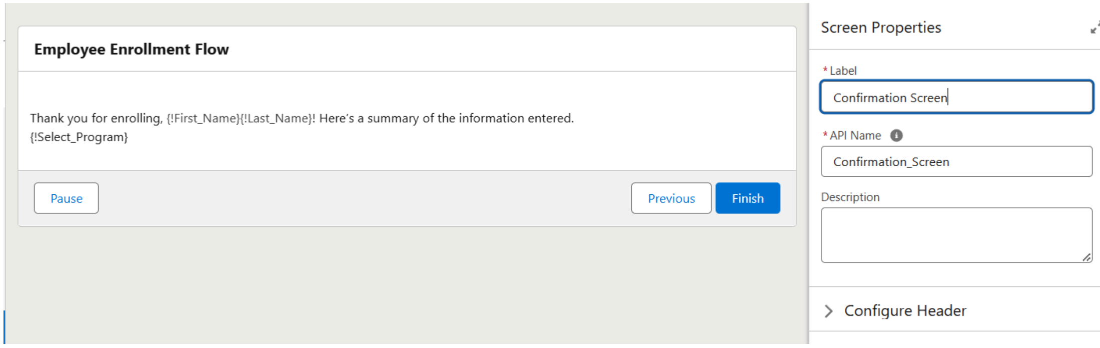
➔ Employee Information



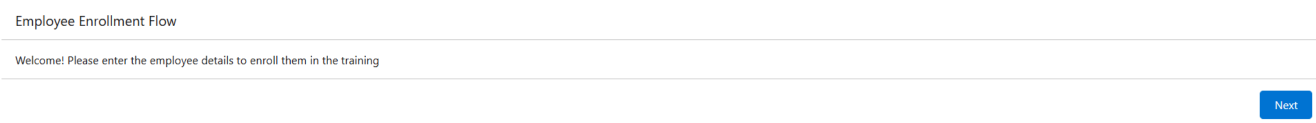
➔ Training Program

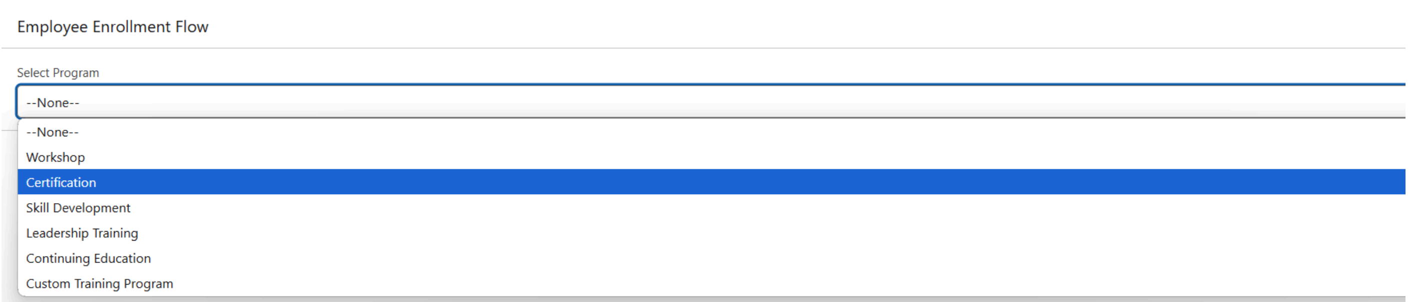


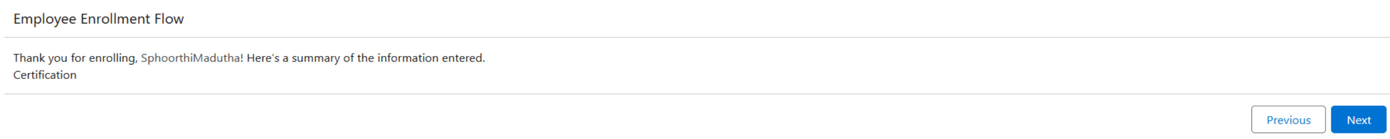
→ Confirmation



→ The flow as it is run.

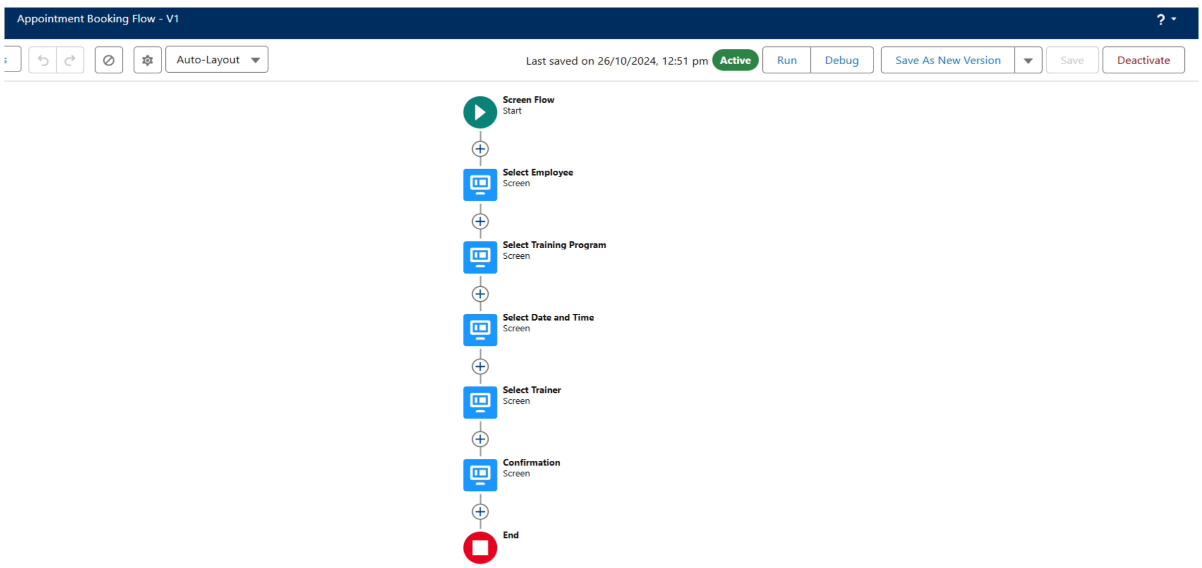




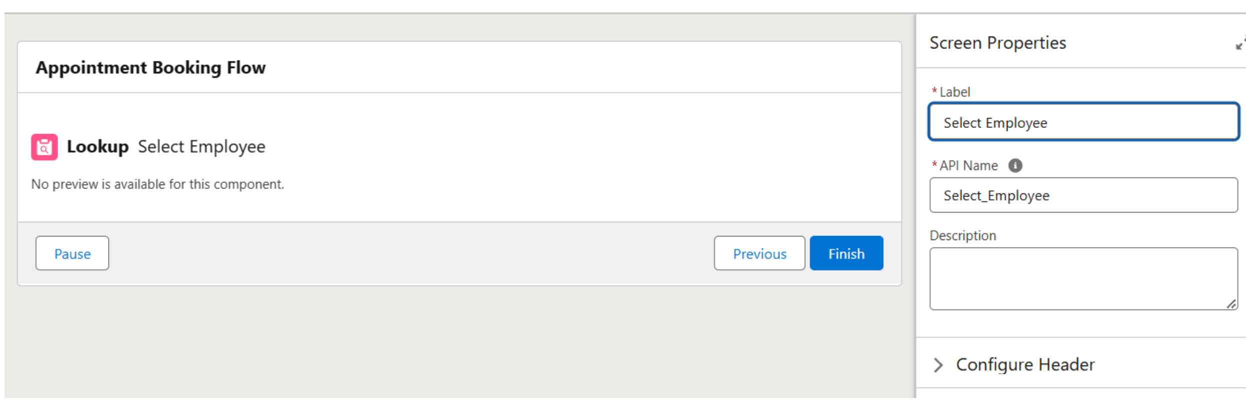


Appointment Booking Flow

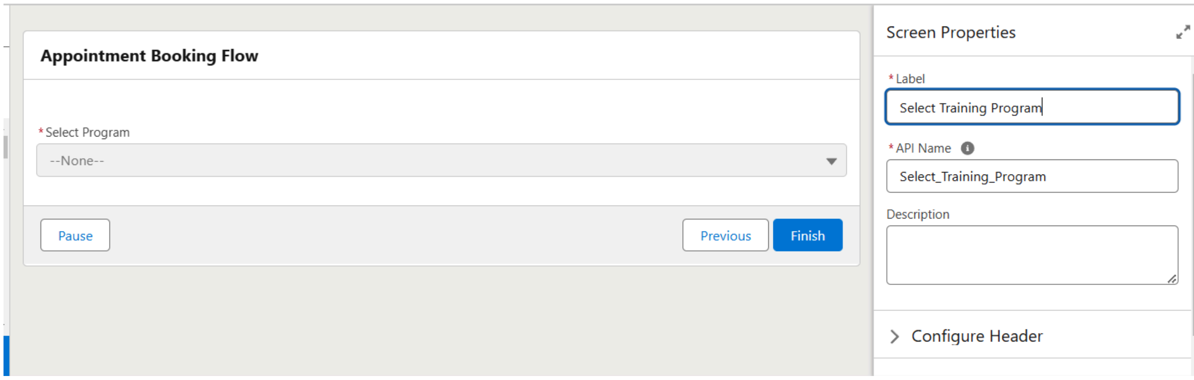
Allow corporate clients or admins to book training sessions for employees.



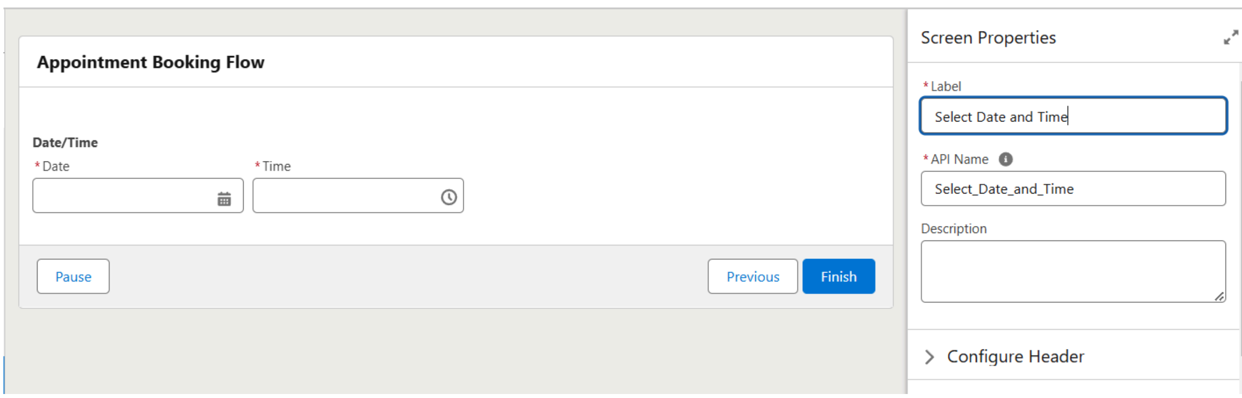
➔ Select Employee:



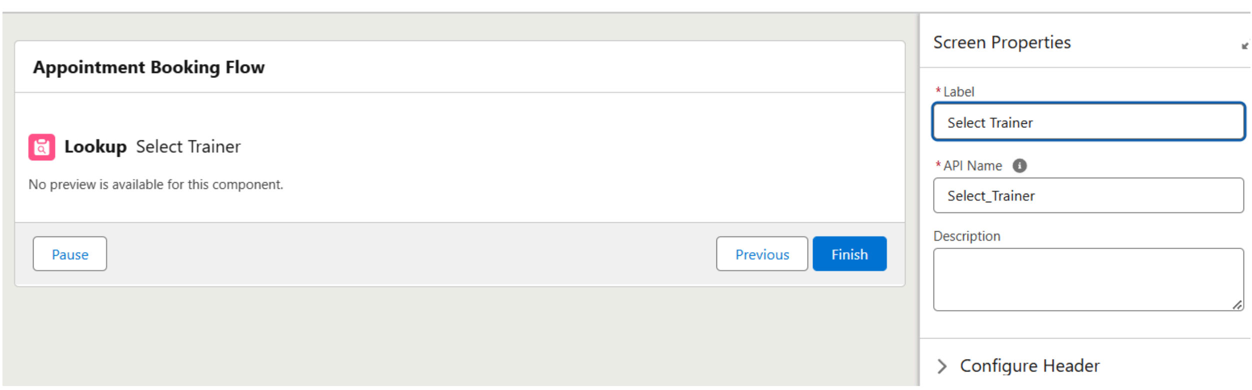
➔ Select Training Program:



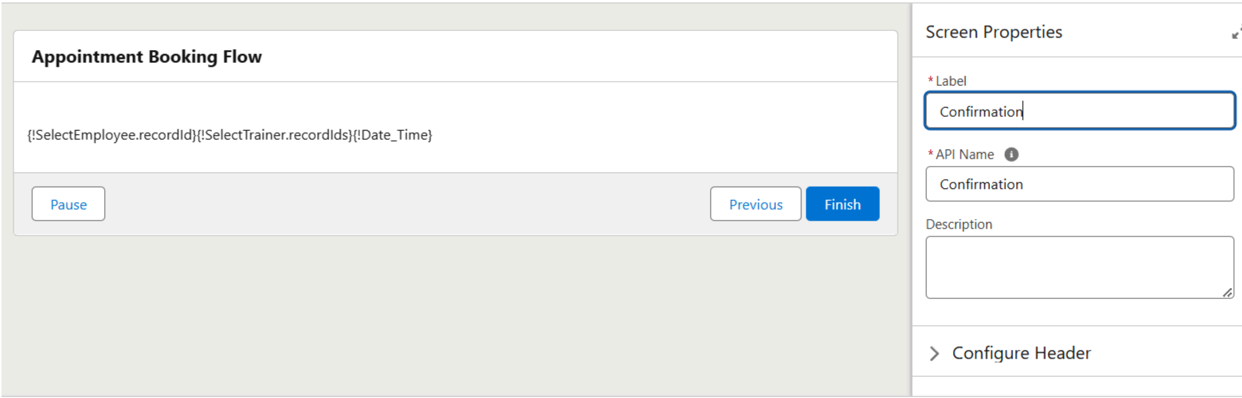
➔ Select Date and Time:



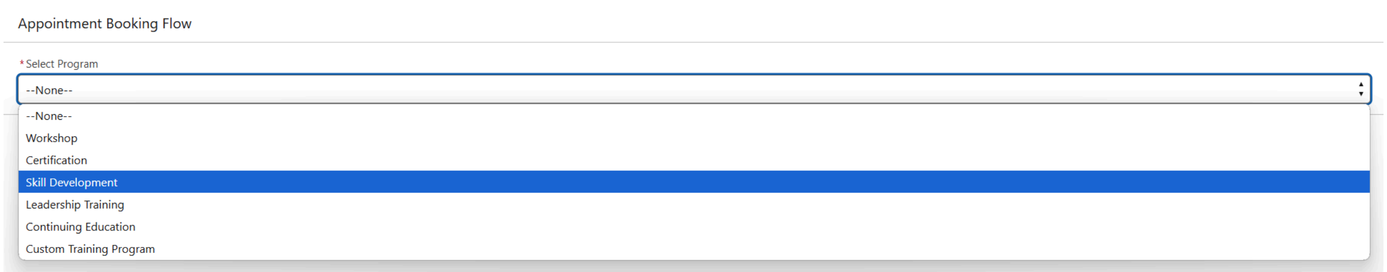
➔ Select Trainer:

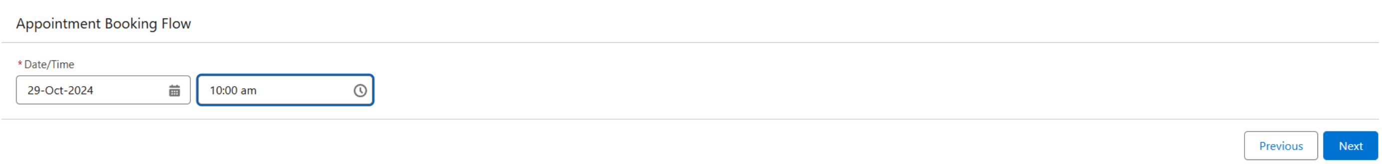


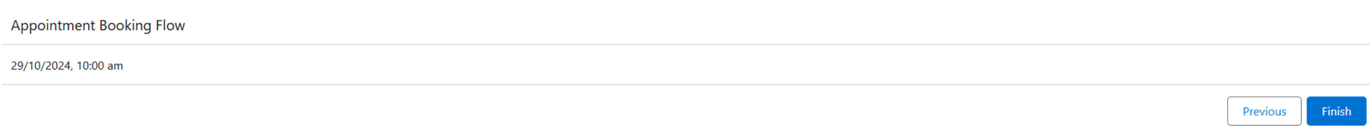
→ Confirmation



→ RUN (of Flow)







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
Edit | Del	TrainingProgramApprovalTriggerTest		62.0	Active	1,575	MADUTHA SPHOORTHI, 25/10/2024, 11:01 pm	
Edit | Del	TrainingProgramTriggerTest		62.0	Active	559	MADUTHA SPHOORTHI, 25/10/2024, 10:31 pm	
Edit | Del | Security	UpdateEmployeeStatusOnApproval		62.0	Active	48	MADUTHA SPHOORTHI, 25/10/2024, 8:56 pm	

Class Body | Class Summary | Version Settings | Trace Flags

```
@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');

        // Test for pending status
        testProgram.Approval_Request__c = false;
        update testProgram;
        updatedProgram = [SELECT Id, Approval_Status__c FROM Training_Program__c WHERE Id = :testProgram.Id];
        System.assertEquals('Pending', updatedProgram.Approval_Status__c, 'The approval status should be set to Pending');

        // Test for rejected status
        testProgram.Approval_Status__c = 'Rejected';
        update testProgram;
        updatedProgram = [SELECT Id, Approval_Status__c FROM Training_Program__c WHERE Id = :testProgram.Id];
        System.assertEquals('Rejected', updatedProgram.Approval_Status__c, 'The approval status should be set to Rejected');

        // Test for draft status
        testProgram.Approval_Status__c = 'Draft';
        update testProgram;
        updatedProgram = [SELECT Id, Approval_Status__c FROM Training_Program__c WHERE Id = :testProgram.Id];
        System.assertEquals('Draft', updatedProgram.Approval_Status__c, 'The approval status should be set to Draft');
    }
}
```

Apex Class

TrainingProgramTriggerTest

Help for this Page

« Back to List: Apex Triggers

Apex Class Detail

Edit | Delete | Download | Run Test | Show Dependencies

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

Class Body | Class Summary | Version Settings | Trace Flags

```
@isTest
public class TrainingProgramTriggerTest {
  @isTest
  static void testTrigger() {
    Training_Program__c testProgram = new Training_Program__c();
    testProgram.Name = 'Test Program';
    testProgram.Approval_Status__c = 'Draft';
    insert testProgram;
    Training_Program__c insertedProgram = [SELECT Id, Approval_Status__c FROM Training_Program__c WHERE Id = :testProgram.Id];
    System.assertEquals('Pending Approval', insertedProgram.Approval_Status__c, 'The status should be set to Pending Approval');
  }
}
```

```
@isTest
public class TrainingProgramTriggerTest {
    @isTest
    static void testTrigger() {
        Training_Program__c testProgram = new Training_Program__c();
        testProgram.Name = 'Test Program';
        testProgram.Approval_Status__c = 'Draft';
        insert testProgram;
        Training_Program__c insertedProgram = [SELECT Id, Approval_Status__c FROM Training_Program__c WHERE Id = :testProgram.Id];
        System.assertEquals('Pending Approval', insertedProgram.Approval_Status__c, 'The status should be set to Pending Approval');
    }
}
```

Logs | Tests | Checkpoints | Query Editor | View State | Progress | Problems

User	Application	Operation	Time	Status	Read	Size
MADUTHA SPHOORTHI	Unknown	/services/data/v62.0/tooling/runTestsS...	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 SPHOORTHI, 25/10/2024, 10:47 pm	Last Modified By	MADUTHA SPHOORTHI, 26/10/2024, 11:42 pm
Namespace Prefix			

Apex Trigger | Version Settings | Trace Flags

```
trigger TrainingProgramApprovalTrigger on Training_Program__c (before update) {
  for (Training_Program__c program : Trigger.new) {
    if (program.Approval_Request__c == true) {
      program.Approval_Status__c = 'Approved';
    } else if (program.Approval_Request__c == false && program.Approval_Status__c != 'Rejected') {
      program.Approval_Status__c = 'Pending';
  }
}
}
```

Apex Trigger

TrainingProgramTrigger

Help for this Page

« Back to List: Apex Triggers

Apex Trigger Detail

Edit | Delete | Download | Show Dependencies

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

Apex Trigger | Version Settings | Trace Flags

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

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.