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.

- The CRM application for the Professional Development Training Institute serves as a centralized system to manage corporate client relationships and streamline training programs. It enables client managers to create and oversee client profiles, allowing corporate clients to enroll employees in specific training sessions, view progress, and receive feedback. By automating key tasks such as session scheduling, employee registration, and data validation, the CRM optimizes administrative efficiency while ensuring accuracy and consistency. Additionally, the system provides real-time reporting on training effectiveness, helping both clients and managers assess program impact and make data-driven decisions for future training needs.

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.

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.

> **Validation Rules**: To ensure data accuracy (e.g., valid email formats, session date checks).

> **Reports:** To provide real-time insights into training effectiveness and client satisfaction.

Detailed Steps to Solution Design:

>> Data Model:

Corporate Client Object:

API Name	Enable Reports
Corporate_Client_c	
Custom	Track Activities
✓	
Singular Label	Track Field History
Corporate Client	
Plural Label	Deployment Status
Corporate Clients	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   Edit | Set Field-Level Security | View Field Accessibility | Where 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 SPHOORTHI, 24/10/2024, 7:42 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:42 pm

Lookup Options

Related To	Employee	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.		

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   Edit | Set Field-Level Security | View Field Accessibility | Where 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 SPHOORTHI, 24/10/2024, 7:01 pm	Modified By	MADUTHA SPHOORTHI, 25/10/2024, 8:04 am

General Options

Required	✓
Default Value	ℹ️

Values							New	Reorder	Replace	Printable View	Chart Colors ▼	Values Help ?

Delete Selected | Deactivate Selected | Replace Selected

☐ 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)

Corporate Client Custom Field
Account Manager
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	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 SPHOORTHI, 24/10/2024, 7:06 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:06 pm

Lookup Options

Related To	User	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.		

6. Contract Value (Currency)

Contract Value
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 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 SPHOORTHI, 24/10/2024, 7:07 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:07 pm

General Options

Required	☐
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

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	Enable Reports
Employee__c	
Custom	Track Activities
✓	
Singular Label	Track Field History
Employee	
Plural Label	Deployment Status
Employees	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   Edit   Set Field-Level Security   View Field Accessibility   Where 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 SPHOORTHI, 24/10/2024, 7:10 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:15 pm

General Options

Required	✓
Unique	☐
Case Sensitive	☐
External ID	☐

2. Last Name (Text)

Employee Custom Field
Last Name
Back to Employee

Validation Rules [0]

Help for this Page

Custom Field Definition Detail   Edit   Set Field-Level Security   View Field Accessibility   Where 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 SPHOORTHI, 24/10/2024, 7:11 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:11 pm

General Options

Required	✓
Unique	☐
Case Sensitive	☐
External ID	☐

3. Email (Email)

Email

Back to Employee

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)

Phone

Back to Employee

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	Employee Custom Field: Phone ~ Salesforce - Developer Edition		
Compliance Categorization			
Created By	MADUTHA SPHOORTHI, 24/10/2024, 7:12 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:12 pm

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)

Employee Custom Field
Corporate Client
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	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 SPHOORTHI, 24/10/2024, 7:14 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:14 pm

Lookup Options

Related To	Corporate Client	Child Relationship Name	Employees
Related List Label	Employees		
Required	☐		
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

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	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			
Field Usage	Employee Custom Field: Date of Hire ~ Salesforce - Developer Edition		
Data Sensitivity Level			
Compliance Categorization			
Created By	MADUTHA SPHOORTHI, 24/10/2024, 7:15 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:15 pm

General Options

Required	✓
Default Value	

8. Status (Picklist: Active, Inactive)

Object 3: Training Program

Details   [Edit] [Delete]

Description

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

Fields for Training Program:

1. Course Duration

2. Program Fee (Currency)

3. Trainer (Lookup → User)

4. Program Type

Training Program Custom Field
Program Type
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	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 SPHOORTHI, 24/10/2024, 7:21 pm	Modified By	MADUTHA SPHOORTHI, 25/10/2024, 10:36 pm

General Options

Required	☐
Default Value	ℹ

5. Start Date (Date)

Training Program Custom Field
Start Date
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	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 SPHOORTHI, 24/10/2024, 7:22 pm	Modified By	MADUTHA SPHOORTHI, 25/10/2024, 10:37 pm

General Options

Required	☐
Default Value	

6. End Date (Date)

Training Program Custom Field
End Date
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	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 SPHOORTHI, 24/10/2024, 7:22 pm	Modified By	MADUTHA SPHOORTHI, 25/10/2024, 10:35 pm

General Options

Required	☐
Default Value	

Object 4: Appointment (Training Session)

API Name	Enable Reports
Appointment__c	
Custom	Track Activities
✓	
Singular Label	Track Field History
Appointment	
Plural Label	Deployment Status
Appointments	Deployed
	Help Settings
	Standard salesforce.com Help Window

Fields for Appointment:

1. Session Date

Appointment Custom Field
Session Date
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	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 SPHOORTHI, 24/10/2024, 7:25 pm		Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:25 pm

General Options

Required	✓
Default Value	

2. Time

3. Training Program (Lookup → Training Program)

4. Trainer (Lookup → User)

5. Employee (Lookup → Employee)

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 SPHOORTHI, 24/10/2024, 7:28 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:28 pm

Lookup Options

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

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

Session Status
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	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 SPHOORTHI, 24/10/2024, 7:28 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:28 pm

General Options

Required	✓
Default Value	ℹ

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	Scheduled	Scheduled	☐	Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:28 pm
☐ Edit | Del | Deactivate	Completed	Completed	☐	Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:28 pm
☐ Edit | Del | Deactivate	Canceled	Canceled	☐	Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:28 pm
☐ Edit | Del | Deactivate	Postponed	Postponed	☐	Assigned dynamically	MADUTHA SPHOORTHI, 24/10/2024, 7:28 pm

Object 5: Feedback

API Name	Enable Reports
Feedback__c	
Custom	Track Activities
✓	
Singular Label	Track Field History
Feedback	
Plural Label	Deployment Status
Feedbacks	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 SPHOORTHI, 24/10/2024, 7:36 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:36 pm

General Options

Required	✓
Unique	☐
External ID	☐
AI Prediction	☐

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 SPHOORTHI, 24/10/2024, 7:36 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:36 pm

General Options

Required	☐
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 SPHOORTHI, 24/10/2024, 7:37 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:37 pm

Lookup Options

Related To	Employee	Child Relationship Name	Feedbacks
Related List Label	Feedbacks		
Required	☐		
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   Edit | Set Field-Level Security | View Field Accessibility | Where 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 SPHOORTHI, 24/10/2024, 7:38 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:38 pm

Lookup Options

Related To	Appointment	Child Relationship Name	Feedbacks
Related List Label	Feedbacks		
Required	☐		
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   Edit | Set Field-Level Security | View Field Accessibility | Where 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 SPHOORTHI, 24/10/2024, 7:38 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:38 pm

General Options

Required	☐
Default Value	

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.

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 SPHOORTHI, 24/10/2024, 7:28 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:28 pm

Lookup Options

Related To	Employee	Child Relationship Name	Appointments
Related List Label	Appointments		
Required	☐		
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 SPHOORTHI, 25/10/2024, 9:58 am	Modified By	MADUTHA SPHOORTHI, 25/10/2024, 9:58 am

Lookup Options

Related To	Appointment	Child Relationship Name	Employees
Related List Label	Employees		
Required	☐		
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   [Edit] [Set Field-Level Security] [View Field Accessibility] [Where 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 SPHOORTHI, 24/10/2024, 7:38 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:38 pm

Lookup Options

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

Appointment Custom Field
Feedback
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	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 SPHOORTHI, 25/10/2024, 10:00 am	Modified By	MADUTHA SPHOORTHI, 25/10/2024, 10:00 am

Lookup Options

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

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 SPHOORTHI, 24/10/2024, 7:37 pm	Modified By	MADUTHA SPHOORTHI, 24/10/2024, 7:37 pm

Lookup Options

Related To	Employee	Child Relationship Name	Feedbacks
Related List Label	Feedbacks		
Required	☐		
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

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

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

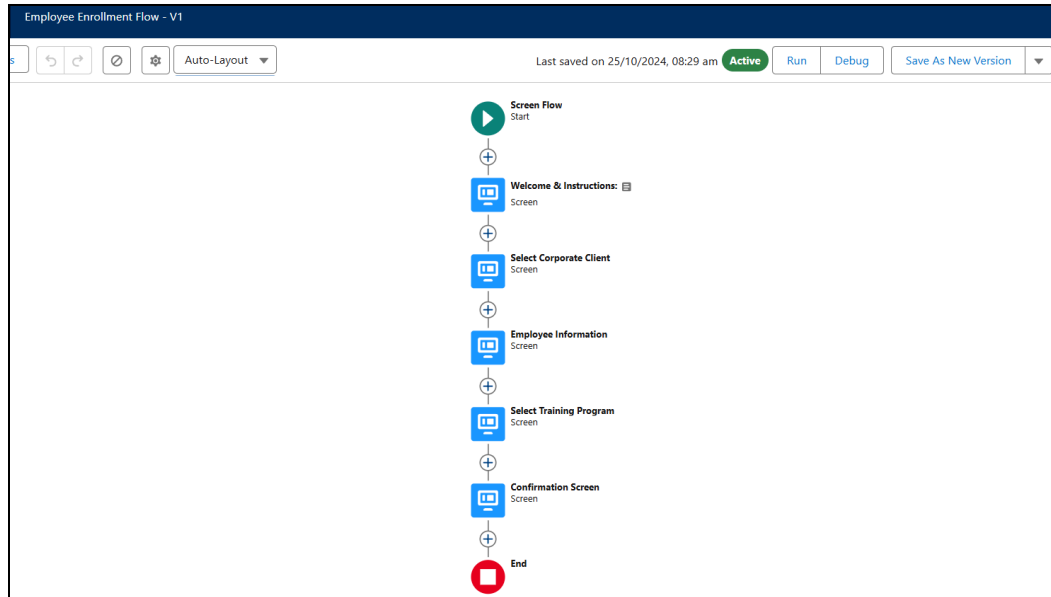|			Help for this Page
Validation Rule Detail	Edit Clone		
Rule Name	Training_Start_and_End_Dates	Active	✓
Error Condition Formula	End_Date__c < Start_Date__c		
Error Message	The End Date must be after the Start Date.	Error Location	Top of Page
Description			
Created By	MADUTHA SPHOORTHI, 24/10/2024, 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 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--
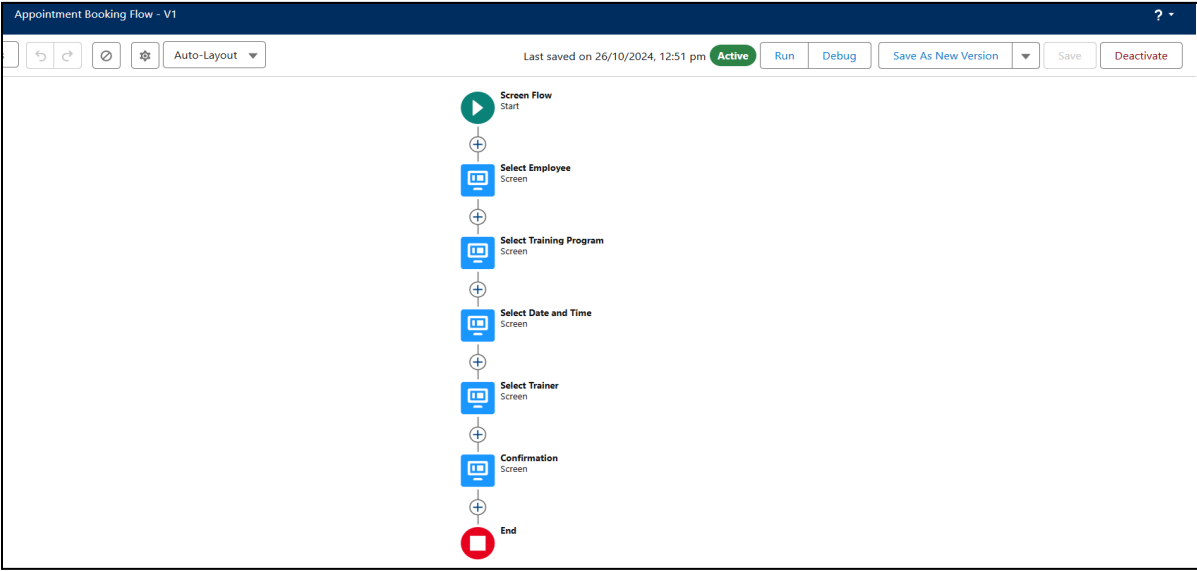Workshop
Certification
Skill Development
Leadership Training
Continuing Education
Custom Training Program

Thank you for enrolling, SphoorthiMadutha! Here's a summary of the information entered.
Certification

Previous | Next

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

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:

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

```
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  }
```

TrainingProgramTriggerTest

« 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

```apex
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 }
```

```apex
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 SPHOORTHI	Unknown	/services/data/v62.0/tooling/runTestsS...	10/26/2024, 11:38:38 PM	Success	Unread	6.54 KB

```apex
@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

```
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

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

```
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 }
```

Approval Testing:

New Training Request

* = Required Information

Information

*Training Request Name
Approval Test

Owner
MADUTHA SPHOORTHI

Approval Status
Pending Approval

Cancel   Save & New   Save

Training Request
Approval Test

New Contact | Edit | New Opportunity

Related   **Details**

Training Request Name
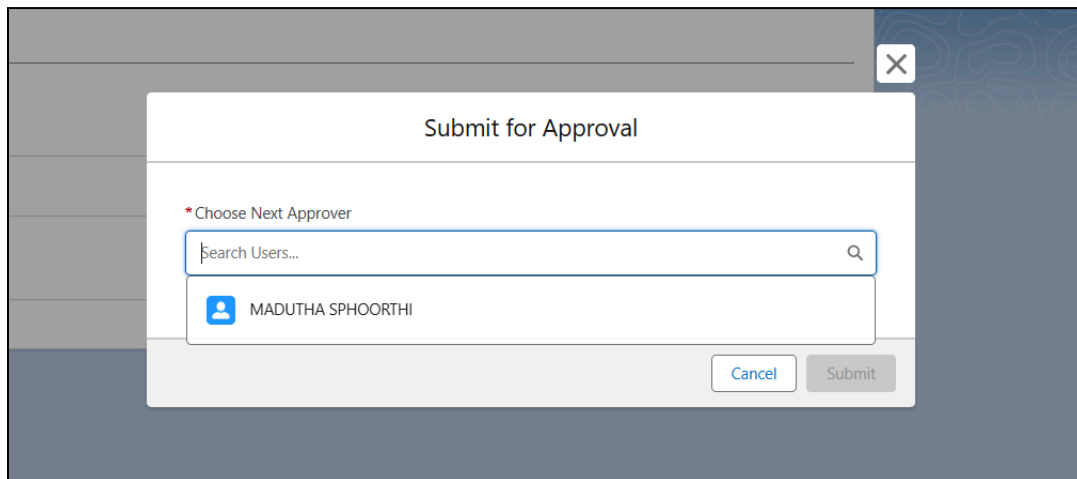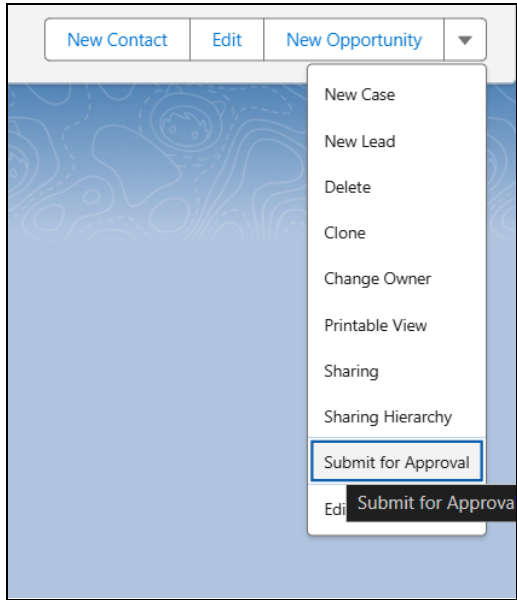Approval Test

Owner
MADUTHA SPHOORTHI

Approval Status
Pending Approval

Created By
MADUTHA SPHOORTHI, 27/10/2024, 9:35 am

Last Modified By
MADUTHA SPHOORTHI, 27/10/2024, 9:35 am
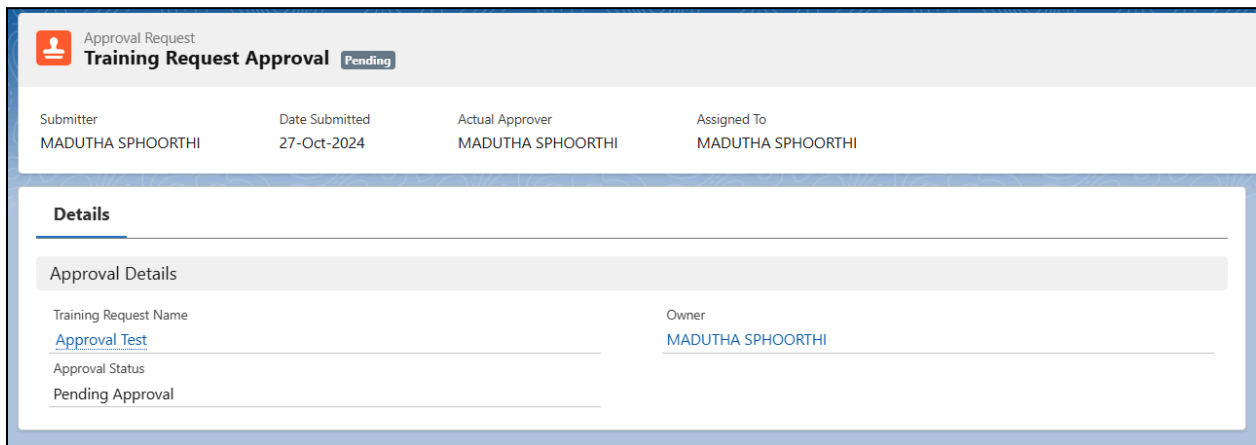
Approve Training Request

Comments

Request approved..!!

Cancel   Approve

Process Instance Step
Training Request Approval `Approved`

Submitter	Date Submitted	Actual Approver	Assigned To
MADUTHA SPHOORTHI	27-Oct-2024	MADUTHA SPHOORTHI	MADUTHA SPHOORTHI

Details

Approval Details

Training Request Name
Approval Test

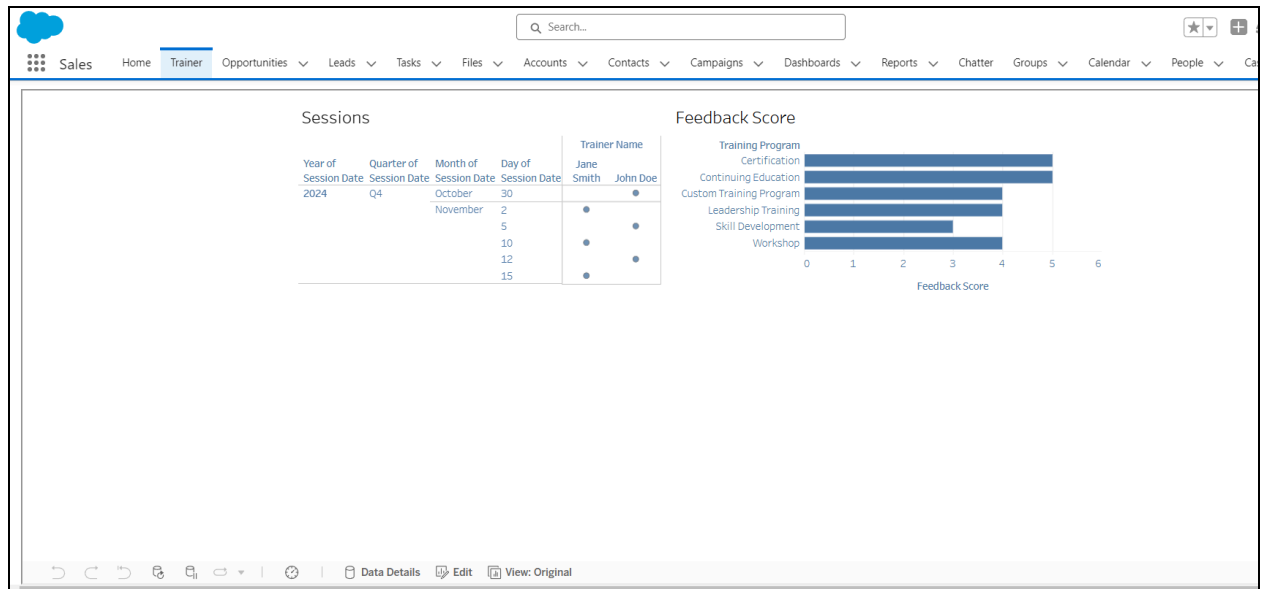Approval Status
Approved

Owner
MADUTHA SPHOORTHI

Approver Comments

MADUTHA SPHOORTHI
Request approved..!!
27-Oct-2024, 9:44:15 am

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.