



# SALESFORCE PROJECT READY

# Entry Level Training & Professional Development Program

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**Project Title: Online Training Management(Admin/Developer)** 

# **INDEX:**

- Create Your Salesforce Developer Org to Get Started
- Custom Object Creation
- Validation Rules Creation
- Process Automation
- Creating Custom Pages Using Visualforce
- Triggers

# Category:

### Salesforce CRM

# Skills Required:

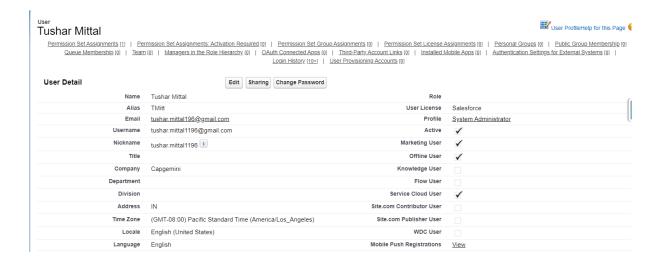
## Salesforce Admin/ Developer

# **Project Description:**

We will be creating an online training management application that will store all the details of the training from courses offered, trainers, students enrolled, Meeting/traininginformation, and many more. In the project, we will be creating objects to store these records and will also create various fields to store the values of these records. We will establish relationships between various objects and create custom pages using visual force.

Topic: Create your DF Developer account to get Started

Detailed Description: Account Creation from developer.salesforce.com



# **Custom App/Object Creation:**

Creation (Course, Trainer, Batch, Meeting, Student), Custom Field



# **Courses-: Offered Courses**

### Fields:

-----

Courses ID - Auto number (C-000001)

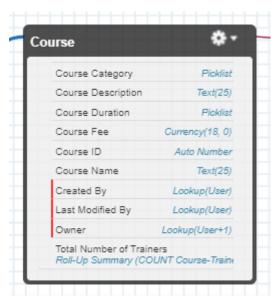
Course Name: Text

Course Duration (In Months) – Picklist (1,2,3,4,5,6)

Course Category: Picklist (Cloud Computing, Data Management, Programming, Web Designing)

Course Fee: Currency

Course Description:



**Trainers: - Associated Trainers** 

Trainer Id: Auto-number (T-00001)

Full Name: Text

Email: Email - No Duplicate

Phone Number: Phone

WhatsApp Number: Phone

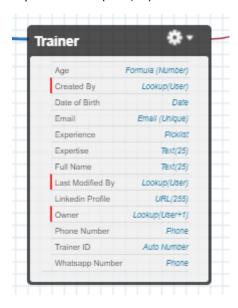
Date Of Birth: Date

Age: Formula

Experience: Picklist

LinkedIn Profile: URL

Expertise: Text (CRM, BI)



# **Students: Enrolled Students:**

Student Id: Autonumber (S-00001)

First Name : Text Last Name : Text

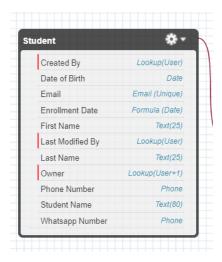
Email Id: Email

Phone Number: Phone

Date Of Birth: Date

whatsapp number :Phone

Enrollment date: AutoGenerated (Date) (Locked Fields/Read only field)



# Meeting: Meeting Id's

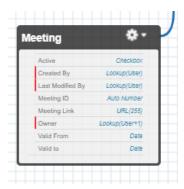
Meeting Id: Autonumber (M-00001)

Valid From: Date

Valid to: Date

Active: Checkbox If checked means Active, if not checked means deactivated

Meeting link: Url



## **Batch:**

Batch id: Auto number (B-00001)

Batch Type: Picklist (Weekday/Weekend)

Start date: date

End date: date

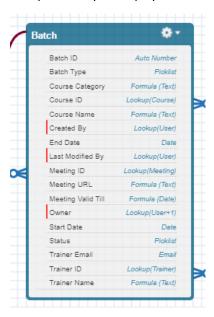
Course Id -Lookup to course object

Meeting id: Lookup to meeting object

Trainer Id: Lookup to trainer object

Status: picklist (Scheduled/ Started/ Completed)

Rollup summary: to display total number of students enrolled



### **Create Validation Rules:**

Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of "True" or "False".

Milestone / Activities: Validation Rule on custom Objects (Course, Trainer, Meeting, Student)

# Create Validation Rules On Course Object:

### **Validations:**

1) Course Fee cannot be in negative and should be less than 3000\$



# Create Validation Rules On Trainer Object:

## **Validation:**

1) Phone and WhatsApp Number - Minimum 10 Digits, Max 15 Digits

2) Full Name -Cannot be blank

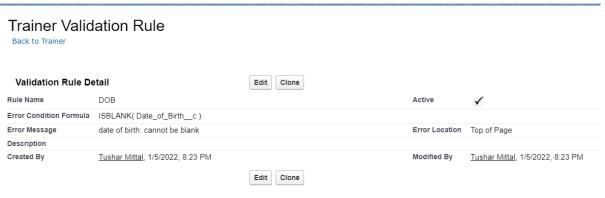
3) Phone Cannot be blank

4) date of birth: cannot be blank

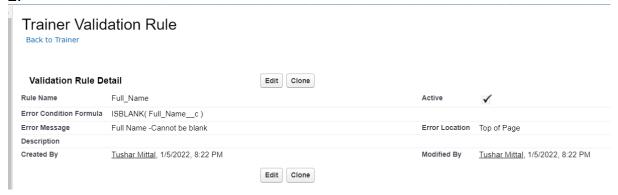
5) Experience : cannot be blank

6) Trainer age cannot be less than 25 years

▲ ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Top of Page	date of birth: cannot be blank	~	Tushar Mittal, 1/5/2022, 8:23 PM
Top of Page	Full Name -Cannot be blank	~	Tushar Mittal, 1/5/2022, 8:22 PM
Top of Page	Phone Cannot be blank		Tushar Mittal, 1/8/2022, 3:19 AM
Top of Page	Phone and WhatsApp Number - Minimum 10 Digits, Max 15 Digits		Tushar Mittal, 1/8/2022, 3:19 AM
Top of Page	Trainer age cannot be less than 25 years	~	Tushar Mittal, 1/4/2022, 6:25 AM
Top of Page	Phone and WhatsApp Number - Minimum 10 Digits, Max 15 Digits		Tushar Mittal, 1/8/2022, 3:20 AM
	Top of Page  Top of Page  Top of Page  Top of Page  Top of Page	Top of Page date of birth: cannot be blank  Top of Page Full Name -Cannot be blank  Top of Page Phone Cannot be blank  Top of Page Phone and WhatsApp Number - Minimum 10 Digits, Max 15 Digits  Top of Page Trainer age cannot be less than 25 years  Phone and WhatsApp Number - Minimum 10	Top of Page date of birth: cannot be blank  Top of Page Full Name -Cannot be blank  Top of Page Phone Cannot be blank  Top of Page Phone and WhatsApp Number - Minimum 10 Digits, Max 15 Digits  Top of Page Trainer age cannot be less than 25 years  Phone and WhatsApp Number - Minimum 10



## 2.



## 3.

### Trainer Validation Rule

Back to Trainer

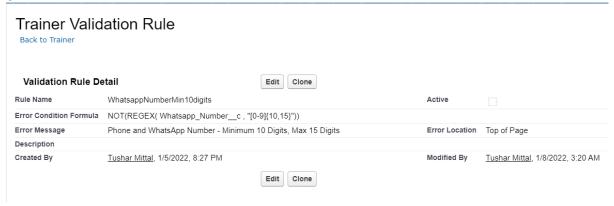


#### 4

#### Trainer Validation Rule Validation Rule Detail Edit Clone Rule Name PhoneNumberMin10digits Active $\textbf{Error Condition Formula} \quad \text{NOT}(REGEX(Phone\_Number\_\_c, "[0-9]\{10,15\}"))$ Error Message Phone and WhatsApp Number - Minimum 10 Digits, Max 15 Digits Error Location Top of Page Description Tushar Mittal, 1/5/2022, 8:26 PM Tushar Mittal, 1/8/2022, 3:19 AM Created By Modified By Edit Clone

#### 5.

#### Trainer Validation Rule Back to Trainer Validation Rule Detail Edit Clone Rule Name Trainer\_age\_cannot\_be\_less\_than\_25\_year Active Error Condition Formula Age\_\_c < 25 Error Message Trainer age cannot be less than 25 years Error Location Top of Page Description Created By Tushar Mittal, 1/4/2022, 6:25 AM Modified By Tushar Mittal, 1/4/2022, 6:25 AM Edit Clone



# Create Validation Rules On Student Object:

### **Validation:**

1.Last Name cannot be blank

2. Phone Number: Min 10 digits

3. WhatsApp number: Min 10 digits

4. min 16 years of age will be required

Validation Rules 4 Items, Sorted by Rule Name					
RULE NAME	▲ ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Age	Top of Page	Min 16 years of age will be required	~	Tushar Mittal, 1/4/2022, 6:40 AM	
LastName	Top of Page	Last Name cannot be blank	~	Tushar Mittal, 1/5/2022, 8:32 PM	
PhoneNumber	Top of Page	Phone Number: Min 10 digits	~	Tushar Mittal, 1/4/2022, 6:37 AM	
WhatsappNumber	Top of Page	Whatsapp Number: Min 10 digits	~	Tushar Mittal, 1/4/2022, 6:37 AM	

1.

#### Student Validation Rule Back to Student Validation Rule Detail Edit Clone Rule Name Active Error Condition Formula YEAR(TODAY())-YEAR(Date\_of\_Birth\_\_c )<16 Error Message Error Location Top of Page Min 16 years of age will be required Description Created By Tushar Mittal, 1/4/2022, 6:40 AM Modified By Tushar Mittal, 1/4/2022, 6:40 AM Edit Clone

## Student Validation Rule

Back to Student

Validation Rule Detail		Edit Clone		
Rule Name	LastName		Active	✓
Error Condition Formula	ISBLANK( Last_Namec )			
Error Message	Last Name cannot be blank		Error Location	Top of Page
Description				
Created By	Tushar Mittal, 1/5/2022, 8:32 PM		Modified By	Tushar Mittal, 1/5/2022, 8:32 PM
		Edit Clone		

3.

# Student Validation Rule

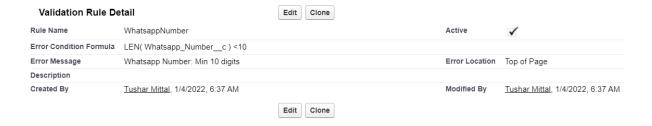
Back to Student

Validation Rule Detail		Edit Clone		
Rule Name	PhoneNumber		Active	✓
Error Condition Formula	LEN( Phone_Numberc ) <10			
Error Message	Phone Number: Min 10 digits		Error Location	Top of Page
Description				
Created By	Tushar Mittal, 1/4/2022, 6:37 AM		Modified By	Tushar Mittal, 1/4/2022, 6:37 AM
		Edit Clone		

4.

# Student Validation Rule

Back to Student



# Create Validation Rules On Meeting Object:

- 1. Valid from cannot be less than current date
- 2. Valid to cannot be less than valid from date
- 3.Min 14 days difference between valid from and valid to date

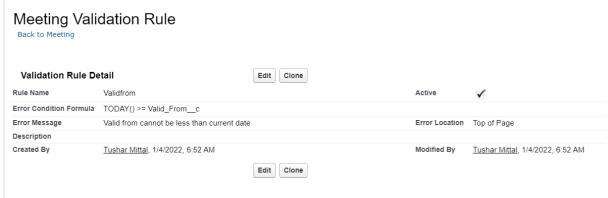
Validation Rule 3 Items, Sorted by Rule	_				
RULE NAME	•	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Validdateduration		Top of Page	Min 14 days difference between valid from and valid to date	~	Tushar Mittal, 1/4/2022, 7:02 AM
Validfrom		Top of Page	Valid from cannot be less than current date	~	Tushar Mittal, 1/4/2022, 6:52 AM
Validto		Top of Page	Valid to cannot be less than valid from date	~	Tushar Mittal, 1/4/2022, 6:54 AM

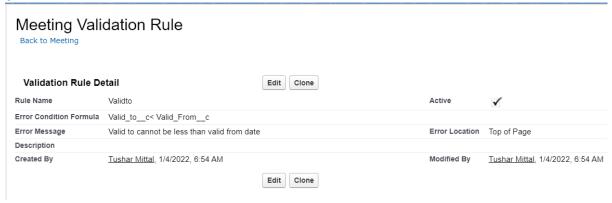
Meeting Validation Rule

Back to Meeting



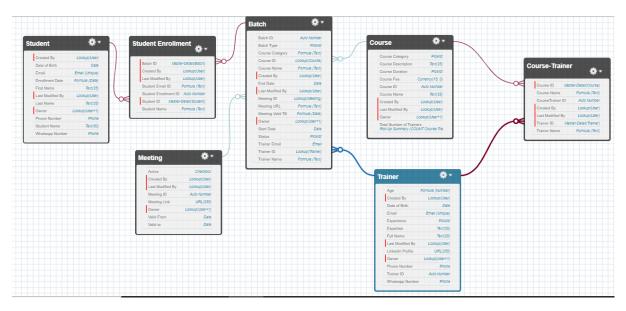
2.





# Relationships (Master Detail, Look-Up):

Milestone / Activities: Create Relationships among all the object according to requirement and behavior and required to create 2 Junction Objects as per functionality (Student Enrollment, Course Trainer)



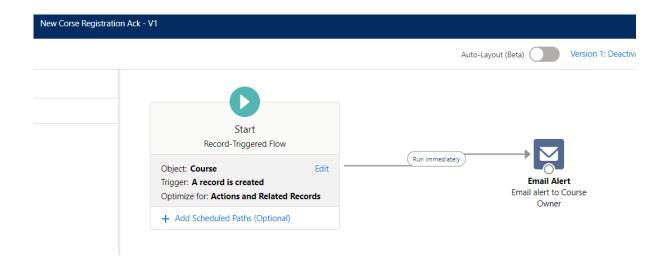
# **Process Automation:**

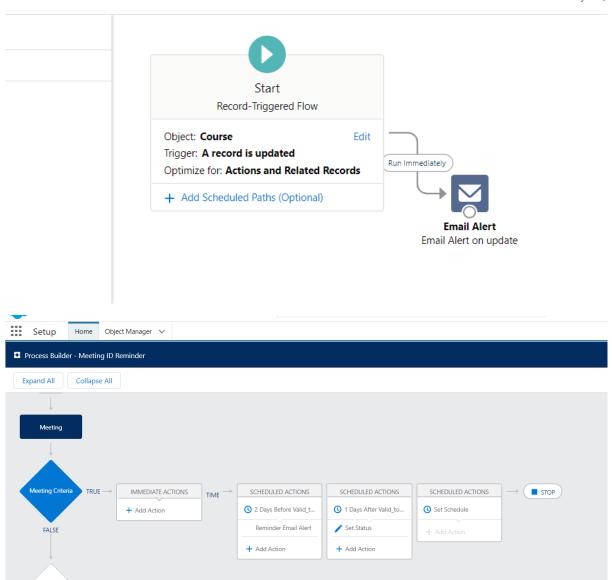
There are four automation tools in salesforce:

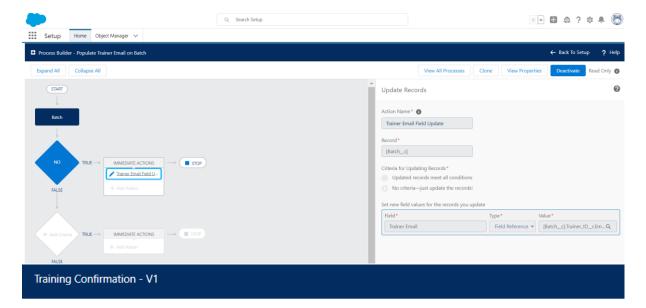
- 1. Approval Process
- 2. Process builder
- 3. Flows
- 4. Workflows

# **Topic: Automation on Custom Objects**

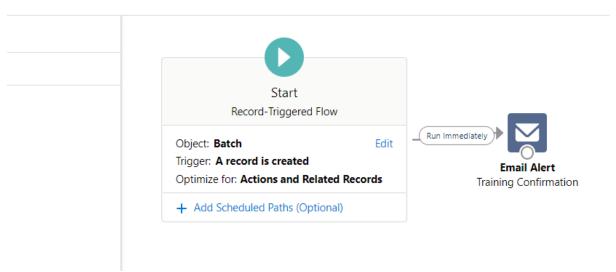
Milestone / Activities: Automation Rule on Custom Object (Course, Meeting, Batch)







Auto-L



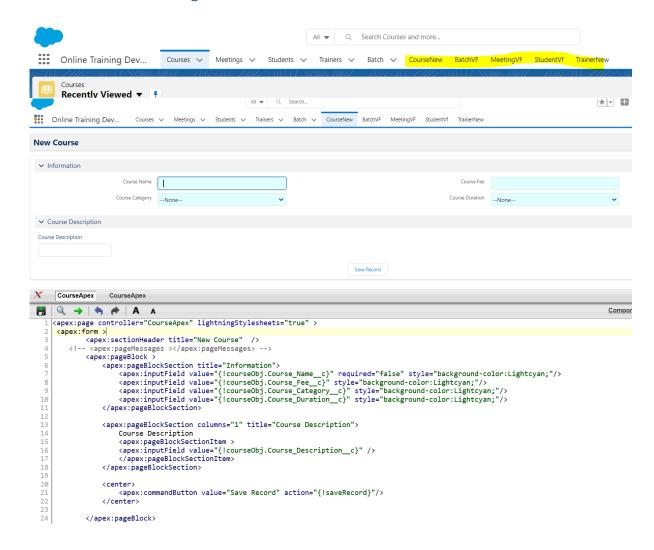
# **Creating Custom Pages Using Visualforce:**

Visualforce is a framework that allows developers to build sophisticated, custom user interfaces that can be hosted natively on the Lightning platform. The Visualforce framework includes a tag-based markup language, similar to HTML, and a set of server-side "standard controllers" that make basic database operations, such as queries and saves, very simple to perform.)

Milestone / Activities: VF Pages (Custom Pages)- Standard Controller, Custom Controller, Extend Controller

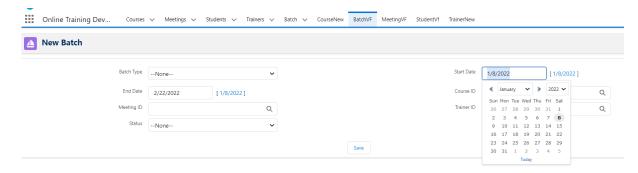
Detailed Description: Custom Pages of Course, Trainer, Batch, Meeting, Student Object

# Custom Visualforce Page of Course



```
X
      CourseApex CourseApex
 Q → 🥱 🖨 A A
      public with sharing class CourseApex
      public Course__c courseObj{get;set;}
          public CourseApex()
               courseObj=new Course__c();
             public PageReference saveRecord()
  10
11
12
             if(courseObj.Course_Name__c=='' ||courseObj.Course_Name__c==null)
                  //ApexPages.addMessage(new ApexPages.message(ApexPages.Severity.Error,'Course can't be left blank')); courseObj.Course_Name__c.addError('course blank'); return null;
  13
14
15
16
17
                    else
  18
19
                  insert courseObj;
                  PageReference pr=new PageReference('/apex/coursethankspage');
//ApexPages.addMessage(new ApexPages.message(ApexPages.Severity.Confirm,'Record Inserted Successfully'));
  20
21
  24
               Ln 25, Ch 2 Total: Ln 25, Ch 765
Position:
```

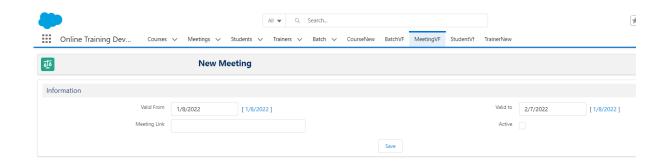
# Standard Visualforce Page of Batch



```
X
       Batch
        <apex:page lightningStylesheets="true" standardController="Batch__c">
             <apex:form >
   3
             <apex:sectionHeader title="New Batch"/>
   4
                   <apex:pageBlock >
   5
                   <apex:pageBlockSection >
                         <apex:inputField value="{!Batch__c.Batch_Type__c}"/>
   6
                         <apex:inputField value= {:Batch_c.Batch_rype_c; //
<apex:inputField value="{!Batch_c.Start_Date_c}"/>
<apex:inputField value="{!Batch_c.End_Date_c}"/>
<apex:inputField value="{!Batch_c.Course_ID_c}"/>
   7
   8
   9
                         <apex:inputField value="{!Batch_c.Cod'se_Ib_c}"/>
<apex:inputField value="{!Batch_c.Meeting_ID_c}"/>
<apex:inputField value="{!Batch_c.Trainer_ID_c}"/>
<apex:inputField value="{!Batch_c.Status_c}"/>
  10
  11
  12
  13
                         </apex:pageBlockSection>
                         <center><apex:commandButton value="Save" action="{!save}"/></center>
  14
                   </apex:pageBlock>
  15
  16
             </apex:form>
  17 </apex:page>
```

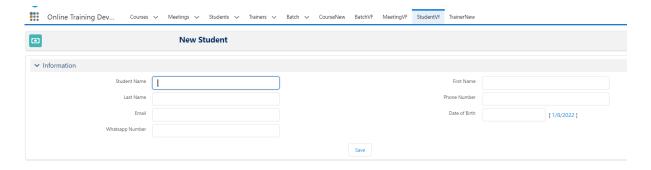
17.01.40

# Standard Visualforce Page of Meeting



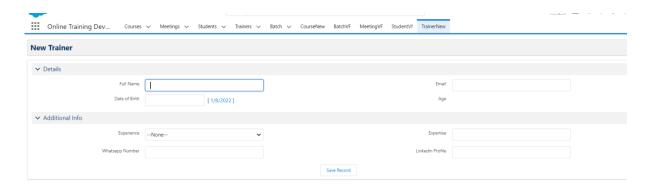


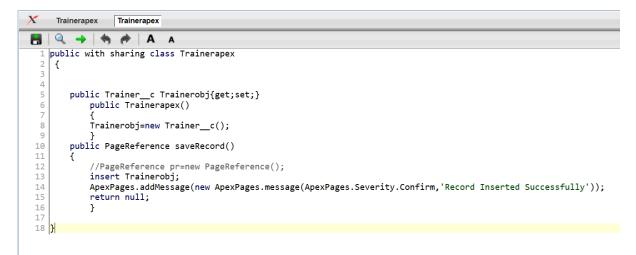
# Standard Visualforce Page of Student



```
Student
          🥱 🎓 A A
   Q ->
  <apex:page standardController="Student__c" lightningStylesheets="true">
 2 <apex:form >
 3 <center><apex:sectionHeader title="New Student"/></center>
4 <apex:pageBlock >
5 <apex:pageBlockSection title="Information" >
6 <apex:inputField value="{!Student_c.Name}"/>
7 <apex:inputField value="{!Student__c.First_Name__c}"/>
8 <apex:inputField value="{!Student__c.Last_Name__c}"/>
9 <apex:inputField value="{!Student_c.Phone_Number_c}"/>
10 <apex:inputField value="{!Student__c.Email__c}"/>
11 <apex:inputField value="{!Student_c.Date_of_Birth_c}"/>
12 <apex:inputField value="{!Student__c.Whatsapp_Number__c}"/>
13 </apex:pageBlockSection>
14 <center>
15 <apex:commandButton value="Save" action="{!save}"/>
16 </center>
17 </apex:pageBlock>
18 </apex:form>
19 </apex:page>
```

# Custom Visualforce Page of Trainer





```
X
     Trainerapex
                   Trainerapex
                       Α
  1 <apex:page Controller="Trainerapex" lightningStylesheets="true">
  2 <apex:form >
  3
  4 <apex:sectionHeader title="New Trainer" />
  5 <apex:pageBlock >
  6 <apex:pageBlockSection title="Details" >
  7 <apex:inputField value="{!Trainerobj.Full_Name__c}"/>
  8 <apex:inputField value="{!Trainerobj.Email__c}"/>
  9 <apex:inputField value="{!Trainerobj.Date_of_Birth__c}"/>
 10 <apex:inputField value="{!Trainerobj.Age__c}"/>
 11 </apex:pageBlockSection>
 12
 13 <apex:pageBlockSection title="Additional Info" >
 14 <apex:inputField value="{!Trainerobj.Experience__c}"/>
15 <apex:inputField value="{!Trainerobj.Expertise__c}"/>
 16 <apex:inputField value="{!Trainerobj.Phone_Number__c}"/>
 17 <apex:inputField value="{!Trainerobj.Whatsapp_Number__c}"/>
 18 <apex:inputField value="{!Trainerobj.Linkedin_Profile__c}"/>
 19 </apex:pageBlockSection>
 20
 21 <center>
 22 <apex:commandButton value="Save Record" action="{!saveRecord}" />
 23 </center>
 24
```

### **Triggers**

A trigger is an Apex script that executes before or after data manipulation language (DML) events occur. Apex triggers enable you to perform custom actions before or afterevents to record in Salesforce, such as insertions, updates, or deletions. Just like database systems support triggers, Apex provides trigger support for managing records.

# Trigger On Trainer Object

```
NewTrainerComponent.cmp NewTra
 Code Coverage: None → API Version: 53 ▼
 trigger ValidateDeleteOnTrainer on Trainer_c (before delete)
          Trainer c Trainerobj = Trigger.New[0];
          //if the trainer have active batch it wont be able to delete
         List<Batch__c> listbatch=[select Name,Status__c
                                    from Batch o
                                    where Trainer_ID__c=:Trainerobj.Id];
         Integer flag=0;
 10
              for(Batch__c b:listbatch)
 11 •
                  if(b.Status__c!='Completed')
 13 •
                      flag=1;
                      break;
 16
                 }
              }
```

# Trigger On Student Object

```
File ▼ Edit ▼ Debug ▼ Test ▼ Workspace ▼ Help ▼ <

    NewTrainerComponent.cmp    NewTrainerComponentController.js    NewTrainerApp    NewTrainerApp.app    NewTrainerApp.app    NewTrainerApp.app    NewTrainerApp.css    NewTrain
           Code Coverage: None • API Version: 53 •
                           public class StudentPhoneValidation
                                        public static void phonevalidate(Student__c studobj)
         3
         4 •
                                                   if(studobj.Phone_Number__c=='' || studobj.Phone_Number__c==Null)
          5
           6 ▼
                                                                       System.debug('Phone cannot be blank');
           8
                                                   }
           9
                                                   else
          10 ▼
           11
                                                                       studobj.Whatsapp_Number__c=studobj.Phone_Number__c;
           12
                                                }
          13
                                     }
          14 }
♦ NewTrainerComponent.cmp × NewTrainerComponentController.js × NewTrainerApp × NewTrainerApp.app × NewTrainerApp.css × StudentPhoneValidation.apxt ✓ Studen
           Code Coverage: None ▼ API Version: 53 ▼
           1 trigger StudentPhoneValidation on Student_c (before insert, before update)
           2 ▼ {
           4 // studobj -object to store one record at a time so we use Trigger.New[0] , Else Trigger.New returns list.
                                             Student__c studobj1=Trigger.New[0];
                                            StudentPhoneValidation.phonevalidate(studobj1); //call apex class and its method
           6
            7 }
```

# Trigger On Meeting Object

```
Code Coverage: None - API Version: 53 -
    trigger DatecheckonMeeting on Meeting_c (before insert)
        for(Meeting_c mt :trigger.new)
            if(mt.Valid_From__c<Date.today() )</pre>
6 •
                mt.Valid_From__c.adderror('Valid From Date Should Be Greater Than Today');
            if(mt.Valid_To__c < mt.Valid_From__c)</pre>
10 •
11
12
                mt.Valid_To__c.adderror('Valid To Date shouldbe greater than valid from date');
13
14
         Integer noOfDays = (mt.Valid_From__c). daysBetween(mt.Valid_To__c);
15
            if(noOfDays < 14)
                mt.Valid_From__c.adderror('Minimum 14 days difference should be present between one meeting');
19
20 }
```

### **Conclusion:**

In this project, I've brushed up many of my concepts like creation of object, applying validation rules, relationships, automations, Triggers and learnt how to create custom pages using visual. While doing all these, I found many errors but all were solved by other colleague or by Trainer. Our Trainer(mentor) supported me a lot to get hands on such a great project. I would look forward to join these kinds of short training in future for further more knowledge and brush up my skills. At present confident enough to work in any development project.

-----Thanks------