ADMINISTRATION ESSENTIALS FOR NEW ADMINS (CUSTOMIZATION: FIELDS)

Exercise Guide

Table of Contents

5-1: Administer Standard Fields 1
5-2: Create Custom Fields 3
5-3: Create Picklists 5
5-4: Create a Close Reason Picklist 8
5-5: Create and Filter Lookups 11
5-6: Create Lookups 14
5-7: Create Custom Formula Fields 16
5-8: Create Custom Formula Fields 20
5-9: Create Page Layouts 22
5-10: Create a Partner Account Page Layout 25
5-11: Create a Customer Account Record Type 27
5-12: Create a Partner Account Record Type 29
5-13: Create a B2C Business Process and Record Type 31
5-14: Create a B2B Business Process and Record Type 34
5-15: Enable Account Field History Tracking 36
5-16: Create an Account Validation Rule 38
5-17: Create an Opportunity Validation Rule 40

5-1: Administer Standard Fields

Goal:

Sales Operations would like to modify the standard account Rating field to help sales users understand how they should be using the field and to promote data quality.

Tasks:

1. Change the label of the Rating field to Prospect Rating.
2. Add help text to the field.
3. Add the new value, Not Known, to the field.
4. Modify the field-level security to make the field editable to Sales Users only.
5. View an account record to see the changes made to the field.

Time:

10 minutes

Instructions:

1. Change the label of the Rating field to Prospect Rating.
   A. Click **Setup | Customize | Tab Names and Labels | Rename Tabs and Labels**.
   B. In the Action column, click **Edit** in front of Accounts.
   C. Leave the tab names unchanged, and click **Next**.
   D. Scroll down the list of standard fields to Rating, and then in the Singular column, change **Rating** to **Prospect Rating**.
   E. Click **Save**.
2. Add help text to the field.
   A. Click **Setup | Customize | Accounts | Fields**.
   B. In the Action column, click **Edit** in front of Rating, and then edit the field definition.
      i. Help Text: `This indicates the likelihood of a sale being made to this account in the next six months.`
         `Cold indicates not likely.`
         `Warm indicates quite likely.`
         `Hot indicates very likely.`
   C. Click **Save**.
3. Add a new value, Not Known, to the field.
   A. In the Field Label column, click **Rating**.
   B. In the Account Rating Picklist Values section, click **New**.

C. In the Add Picklist Values box, enter `Not Known`
D. Click **Save**.

4. Modify the field-level security to make the field editable to Sales Users only.

   A. Click **Set Field-Level Security**.

      i. In the Read-Only column header, select the **checkbox**.
      ii. In the Read-Only column, clear the **Sales User** checkbox.

   B. Click **Save**.

5. View an account record to see the changes made to the field.

   A. Click the **Accounts** tab.
   B. From the View picklist, select **All Accounts**, and then click **Go!**
   C. In the Account Name column, click **ABC Labs**.
   D. Next to the Prospect Rating field, hover over the **help** icon to view the help text.
   E. Double-click the **field value**, and then click the **picklist** to view the new Not Known value.
   F. Click **Cancel** to cancel the edit without making changes.

5-2: Create Custom Fields

Goal:

Noah Larkin, the VP of Services, would like to be able to track which customers have a support plan and the expiration date of the support plan.

Tasks:

1. Create a custom checkbox field called Has Support Plan, editable by Sales and Support Users only.
2. Create a custom date field called Support Plan Expiration Date, editable by Sales and Support Users only.
3. Edit an account record to test the new fields.

Time:

10 minutes

Instructions:

1. Create a custom checkbox field called Has Support Plan, editable by Sales and Support Users only.
   A. Click **Setup | Customize | Accounts | Fields**.
   B. In the Account Custom Fields & Relationships list, click **New**.
   C. In Step 1, select the **Checkbox** radio button, and then click **Next**.
   D. Complete the new field details in Step 2.
      i. Field Label: `Has Support Plan`
      ii. Default Value: **Unchecked**
      iii. Description: `Sales users use this field to indicate to Support which customers have support plans.`
      iv. Help Text: `Does this customer have a current support plan? Check this box when you sell a support plan to this customer.`
   E. Click **Next**.
   F. Complete Step 3 as follows:
      i. In the Read-Only column header, select the **checkbox**.
      ii. In the Read-Only column, clear the **Sales User** and **Support User** checkboxes.
   G. Click **Next**.
   H. Click **Save & New**.
2. Create a custom date field called Support Plan Expiration Date, editable by Sales and Support Users only.

A. In Step 1, select the **Date** radio button, and then click **Next**.
B. Complete the Step 2 details.
   i. Field Label: `Support Plan Expiration Date`
   ii. Description: `Expiration date of current support plan.`
   iii. Help Text: `When is the current support plan due for renewal?`
C. Click **Next**.
D. Complete Step 3 as follows:
   i. In the Read-Only column header, select the **checkbox**.
   ii. In the Read-Only column, clear the **Sales User** and **Support User** checkboxes.
   iii. Click **Next**.
E. Click **Save**.

3. Edit an account record to test the new fields.
   A. Click the **Accounts** tab.
   B. From the View picklist, select **All Accounts**, and then click **Go!**
   C. In the Account Name column, click **ABC Labs**.
   D. Next to the Has Support Plan and Support Plan Expiration Date fields, hover over the **help** icons to view the help text.
   E. Double-click the **Has Support Plan** checkbox, and then select it.
   F. Double-click the **Support Plan Expiration Date** field, and then select a date one year from today.
   G. Click **Save**.

5-3: Create Picklists

Goal:

Sales Operations divides AW Computing's sales territory into regions and zones. The team would like to be able to identify each account record by its region and zone.

Tasks:

1. Copy the required Region and Zone values from Yuko Ishikawa's Chatter post.
2. Create a custom picklist field called Region, editable by Sales Users only.
3. Create a custom picklist field called Zone, editable by Sales Users only.
4. Create a dependency between these two picklists so that when a region is selected, only respective zones are available in the Zone field.
5. Edit the ABC Labs account to test the new fields.

Time:

10 minutes

Instructions:

1. Copy the required Region and Zone values from Yuko Ishikawa's Chatter post.
   A. In the Global Search box, enter `Yuko` and click **Search**.
   B. At the top of the search results page, click **Search Feeds**.
   C. Find Yuko's post with the Region and Zone values, and then copy all of the values. Note: Click the **Show More** link if needed to display the full list of Regions and Zones.
2. Create a custom picklist field called Region, editable by Sales Users only.
   A. Click **Setup | Customize | Accounts | Fields**.
   B. In the Account Custom Fields & Relationships list, click **New**.
   C. In Step 1, select the **Picklist** radio button, and then click **Next**.
   D. Complete the Step 2 details.
      i. Field Label: `Region`
      ii. In the next box, enter the regions, each on a new line.

```
APAC
EMEA
LATAM
US
Canada
```

      iii. Description: `Customer's geographical region—for sales operations use only.`

iv. Help Text: `In which region is this customer based?`

E. Click **Next**.
F. Complete the Step 3 details.

i. In the Read-Only column header, select the **checkbox**.
ii. In the Read-Only column, clear the **Sales User** checkbox.

G. Click **Next**.
H. Click **Save & New**.

3. Create a custom picklist field called Zone, editable by Sales Users only.

A. In Step 1, select the **Picklist** radio button, and then click **Next**.
B. Complete the Step 2 details.

i. Field Label: `Zone`
ii. In the next box, paste the Region and Zone values you copied from Yuko's Chatter post.
iii. Delete the Region values from the list.

APAC
EMEA
LATAM
US
Canada

iv. Description: `Customer's zone within the selected region—for sales operations use only.`
v. Help Text: `In which zone is this customer based? Depends on region.`

C. Click **Next**.
D. Complete Step 3 as follows:

i. In the Read-Only column header, select the **checkbox**.
ii. In the Read-Only column, clear the **Sales User** checkbox.

E. Click **Next**.
F. Click **Save**.

4. Create a dependency between these two picklists, so that when a Region is selected, only respective zones are available in the Zone field.

A. In the Account Custom Fields & Relationships list, click **Field Dependencies**.
B. Click **New**, and set up the new field dependency.

i. Controlling Field: **Region**

    ii. Dependent Field: **Zone**

  C. Click **Continue**.
  D. Holding **CTRL**, select the appropriate zones in each column.

    i. APAC: **East Asia**, **Oceania**, **Southeast Asia**
    ii. EMEA: **Africa**, **Europe**, **Middle East**, **UK + Ireland**
    iii. LATAM: **Caribbean**, **Central America**, **South America**
    iv. US: **Midwest US**, **Northeast US**, **Southeast US**, **Southwest US**, **West US**
    v. Canada: **Northern Canada**, **Mountains and the West**, **The Prairies**, **Central Canada**, **East Coast**

  E. Click **Include Values**.
  F. Click **Preview**, and then test the dependency by selecting different regions and viewing the different zones available for each region.
  G. Click **Close** to close the preview window.
  H. Click **Save**.

5. Edit the ABC Labs account to test the new fields.

  A. Click the **Accounts** tab.
  B. From the View picklist, select **All Accounts**, and then click **Go!**
  C. In the Account Name column, click **ABC Labs**.
  D. Double-click the **Region** field, and then complete the dependent fields.

    i. Region: **US**
    ii. Zone: **West US**

  E. Click **OK**.
  F. Click **Save**.

5-4: Create a Close Reason Picklist

Goal:

Allison Wheeler, VP of Global Sales, would like to track the reasons why opportunities are being won or lost. She wants to ensure that users can only select the appropriate reasons, and only when the opportunity is at Closed Won or Closed Lost.

Tasks:

1. Copy the required Close Reason values from Allison Wheeler's Chatter post.
2. Create a multi-select picklist field called Close Reason, editable by Sales Users only.
3. Create a dependency between the Stage field and the new Close Reason field. (Note: Not all Stage values will have a dependent Close Reason.)
4. Edit the ABC – 10 Laptops opportunity to test the new field.

Time:

10 minutes

Instructions:

1. Copy the required Close Reason values from Allison Wheeler's Chatter post.
   A. In the Global Search box, enter `Allison` and click **Search**.
   B. At the top of the search results page, click **Search Feeds**.
   C. Find Allison's post with the Close Reason values, and then copy all of the values. Note: Click the **Show More** link if needed to display the full list Close Reasons.
2. Create a custom picklist field called Close Reason, editable by Sales Users only.
   A. Click **Setup | Customize | Opportunities | Fields**.
   B. In the Opportunity Custom Fields & Relationships list, click **New**.
   C. In Step 1, select **Picklist (Multi-Select)**, and then click **Next**.
   D. Complete the new field details in Step 2.
      i. Field Label: `Close Reason`
      ii. In the next box, paste the Close Reason values you copied from Allison's Chatter post.
      iii. # Visible Lines: `5`
      iv. Description: `Created for the VP of Global Sales to track wins and losses.`
      v. Help Text: `When you close the opportunity, select one or more values that best describe your reason for closing.`

E. Click **Next**.
F. Complete the field-level security in Step 3.
   i. In the Read-Only column header, select the **checkbox**.
   ii. In the Read-Only column, clear the **Sales User** checkbox.
G. Click **Next**.
H. Click **Save**.

3. Create a dependency between the Stage field and the new Close Reason field. (Note: Not all Stage values will have a dependent Close Reason.)
   A. In the Opportunity Custom Fields & Relationships list, click **Field Dependencies**.
   B. Click **New**, and set up the new field dependency.
      i. Controlling Field: **Stage**
      ii. Dependent Field: **Close Reason**
      iii. Click **Continue**.
   C. At the top of the table, click **Next** until you see the Closed Won and Closed Lost columns.
   D. Holding **CTRL**, select the appropriate Close Reasons in the Closed Won and Closed Lost columns.
      i. Closed Won: **All values starting with Won**
      ii. Closed Lost: **All values starting with Lost**
      iii. Click **Include Values**.
   E. Click **Preview**, and then test the dependency by selecting different stages and viewing the different close reasons available for each stage.
   F. Click **Close** to close the preview window.
   G. Click **Save**, and click **OK** to accept the warning that not all dependent values have been included.

4. Edit the ABC – 10 Laptops opportunity to test the new field.
   A. Click the **Opportunities** tab.
   B. From the View picklist, select **All Opportunities**, and then click **Go!**
   C. Click the **Opportunity Name** column header to sort the column alphabetically.
   D. Click **ABC – 10 Laptops**.
   E. Double-click the **Stage** field, and then complete the dependent fields.
      i. Stage: **Closed Won**
      ii. Close Reason: **Won: Competitor**, **Won: Price** (Hold down **CTRL** to select both)
      iii. Click the top **arrow** button to add the selected values.
   F. Click **OK**.
   G. Click **Save**.

5-5: Create and Filter Lookups

Goal:

Noah Larkin, VP of Services, would like reps to be able to capture the name of the backup rep on their cases when they are away from the office. He also wants to ensure that new cases can only be associated to contacts from the same account.

Tasks:

1. Create a new Backup Agent field that looks up to the User object, editable by Support Users only.
2. Add a filter to the lookup to ensure that only users assigned to the Support User profile can be selected.
3. Add a filter to the case Contact Name field so that users can only select contacts related to the account selected in the case Account Name field.
4. Create a new case to test the lookups. Test both non Support and Support users.

Time:

10 minutes

Instructions:

1. Create a new Backup Agent field that looks up to the User object, editable by Support Users only.

   A. Click **Setup | Customize | Cases | Fields**.
   B. In the Case Custom Fields & Relationships section, click **New**.
   C. In Step 1, select **Lookup Relationship**, and then click **Next**.
   D. In Step 2, from the Related To picklist, select **User**, and then click **Next**.
   E. Complete the Step 3 details.

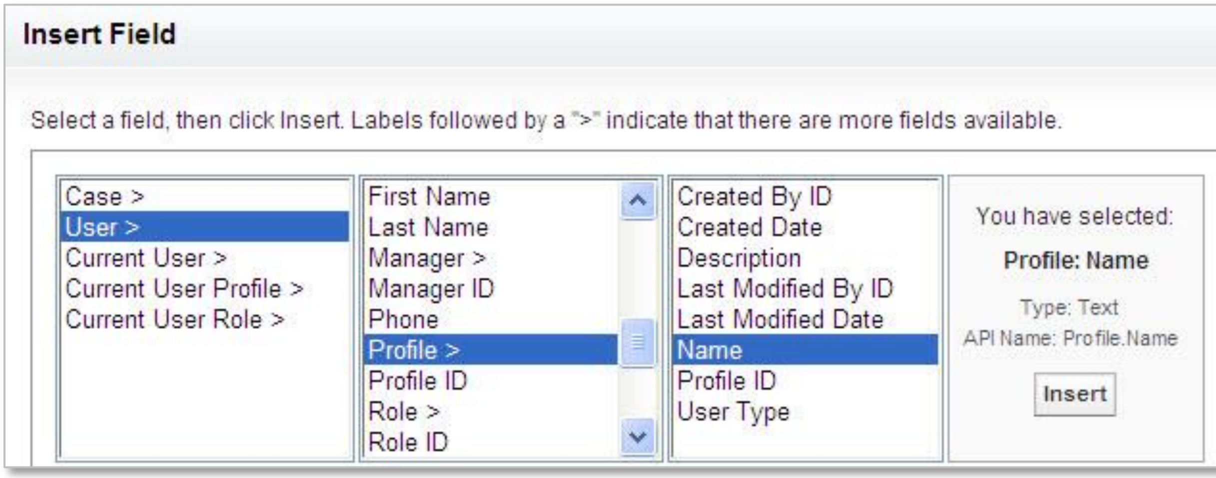
      i. Rename the Field Label: `Backup Agent`
      ii. Description: `Used to identify the assigned support rep when case owner is away—for support use only.`
      iii. Help Text: `Who is the assigned support rep when case owner is away?`

2. Add a filter to the lookup to ensure that only users in the Support department can be selected.

   A. In the Lookup Filter section, click **Show Filter Settings**.
   B. Click the **lookup** icon to construct the filter.

      i. Field: **User: Profile: Name**

ii. Click **Insert.**



iii. Operator: **equals**
iv. Value/Field: **Value**
v. In the final field of the filter: `Support User`
vi. Filter Type: **Required**
vii. If it doesn't, display this error message on save: `User does not exist or is not a support user.`
viii. Active: **Select**

C. Click **Next**.
D. Complete the field-level security in Step 4.

i. In the Read-Only column header, select the **checkbox**.
ii. In the Read-Only column, clear the **Support User** checkbox.

E. Click **Next**.
F. Clear the **checkbox** in front of the Close Case page layout.
G. Click **Save**.

3. Add a filter to the case Contact Name field so that users can only select contacts related to the account selected in the case Account Name field.

A. In the Action column, click **Edit** in front of Contact Name.
B. In the Lookup Filter section, click **Show Filter Settings**.
C. Click the **lookup** icon to construct the filter.

i. Field: **Contact Name: Account ID**
ii. Click **Insert.**
iii. Operator: **equals**
iv. Value/Field: **Field**

v. In the final field of the filter: `Case: Account ID`
vi. Click **Insert**.
vii. Filter Type: **Required**
viii. If it doesn't, display this error message on save: `You must select a contact related to the same account as the case.`
ix. Active: **Select**

D. Click **Save**.

4. Create a new case to test the lookups. Test both non Support and Support users.

A. From the Force.com App Menu, select **Call Center**.
B. Click the **Cases** tab.
C. Click **New**, and then complete the new case record details.

i. Contact Name: `Jon Amos` (Enter this value manually. Don't use the lookup icon.)
ii. Account Name: `ABC Labs`
iii. Enter `Allison Wheeler` in the Backup Agent field. (Don't use the lookup icon.)
iv. Case Origin: **Phone**

D. Click **Save**.

Notice the error messages that appear.

E. Enter permissible values:

i. Contact Name: `Bertha Boxer`
ii. Backup Agent: `Tim Howe`

F. Click **Save**.

Notice the error messages no longer appear.

5-6: Create Lookups

Goal:

Conner McCoy, VP of Marketing, has initiated an employee referral scheme, whereby employees can refer leads to marketing. He would like to be able to capture this employee information on the lead record.

Tasks:

1. Create a new Employee Referral field that looks up to the User object.
2. Add a filter to the lookup to ensure that all users, except for those with the VAR User profile, can be selected.
3. Test the lookup on Jon Airaudi's lead record by entering a VAR User, Maria Bolzani, in the Employee Referral field.

Time:

10 minutes

Instructions:

1. Create a new Employee Referral field that looks up to the User object.
    A. Click **Setup | Customize | Leads | Fields**.
    B. In the Lead Custom Fields & Relationships list, click **New**.
    C. In Step 1, select **Lookup Relationship**, and then click **Next**.
    D. In Step 2, from the Related To picklist, select **User**, and then click **Next**.
    E. Complete the Step 3 details.
        i. Rename the Field Label: `Employee Referral`
        ii. Description: `Used to identify the user who has referred the lead—for marketing use only.`
        iii. Help Text: `Identifies the user who has referred the lead.`
2. Add a filter to the lookup to ensure that all users, except for those with the VAR User profile, can be selected.
    A. In the Lookup Filter section, click **Show Filter Settings**, and then add the filter information.
        i. Field: **User: Profile: Name** (Hint: click the **magnifying glass** icon.)
        ii. Operator: **not equal to**
        iii. Value/Field: **Value**
        iv. In the final field of the filter: `VAR User` (Note: VAR User is case sensitive)
        v. Filter Type: **Required**

vi. If it doesn't, display this error message on save: `VAR User profile users are not able to refer leads.`
vii. Active: **Select**
viii. Click **Next**.

B. Complete the field-level security in Step 4.

i. In the Read-Only column header, select the **checkbox**.
ii. In the Read-Only column, clear the **General Marketing User** checkbox.

C. Click **Next**.
D. Clear the **checkbox** in front of the Web to Lead page layout.
E. Click **Save**.

3. Test the lookup on Jon Airaudi's lead record by entering a VAR User, Maria Bolzani, in the Employee Referral field.

A. From the Force.com App Menu, select **Marketing**.
B. Click the **Leads** tab.
C. From the View picklist, select **All Open Leads**, and then click **Go!**
D. In the Name column, click the **column header** to sort alphabetically.
E. Click **Airaudi, Jon**.
F. Double-click the **Employee Referral** field, and then enter `Maria Bolzani`
G. Click **Save**.

Notice the error message that appears.

H. In the Employee Referral field, enter `Phil Smith`
I. Click **Save**.

Notice the error message no longer appears.

5-7: Create Custom Formula Fields

Goal:

Allison Wheeler, VP of Global Sales, would like to display commission on won opportunities. She would also like Sales Operations to be able to view the account region and zone information at the opportunity level.

Tasks:

1. Create a custom formula field on the Opportunity object that calculates 10 percent commission.
2. Modify the formula so that the commission is only calculated when an opportunity is closed won.
3. Create a custom formula field on the Opportunity object that displays the Region and Zone information from the account record.

Time:

20 minutes

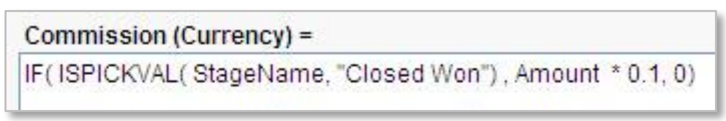
Instructions:

1. Create a custom formula field on the Opportunity object that calculates 10 percent commission whenever an opportunity is closed won.
   A. Click **Setup | Customize | Opportunities | Fields**.
   B. In the Opportunity Custom Fields & Relationships list, click **New**.
   C. In Step 1, select **Formula**, and then click **Next**.
   D. Complete the new field details in Step 2.
      i. Field Label: **Commission**
      ii. Formula Return Type: **Currency**
   E. Click **Next**.
   F. Complete the formula details in Step 3.
      i. From the Insert Merge Field picklist, select **Amount**.
      ii. Click **Insert Operator** and select ***Multiply**.
      iii. In the Commission (Currency)= box, complete the formula.
         a. Enter `Amount * 0.1` (Note: The final formula should read Amount * 0.1)
         b. Click **Check Syntax**.
      iv. Description: `Calculates sales rep commission of 10 percent when opportunity is won.`
      v. Help Text: `Sales rep commission when opportunity is won.`

G. Click **Next**.
H. Complete the field level security details in Step 4.
    i. In the Visible column header, clear the **checkbox**.
    ii. In the Visible column, select the **Executive User**, **Sales User**, and **System Administrator** checkboxes.
I. Click **Next**.
J. Click **Save**.
K. Click the **Opportunities** tab.
L. From the View picklist, select **All Opportunities**, and then click **Go!**
M. In the Opportunity Name column, click **ACME – 700 Desktops**.

    Notice that the commission is displayed even though the opportunity is not won.

2. Modify the formula so that the commission is only calculated when an opportunity is closed won.
    A. Click **Setup | Customize | Opportunities | Fields**.
    B. In the Opportunity Custom Fields & Relationships list, click **Edit** in front of Commission.
    C. In the Formula Options section, click the **Advanced Formula** tab, and then modify the formula.



    i. In the Commission (Currency)= box, click at the **beginning** of the formula to place the cursor.
    ii. From the Functions list, select **IF**, and then click **Insert Selected Function**.
    iii. In the formula, highlight **logical_test**
    iv. From the Functions list, select **ISPICKVAL**, and then click **Insert Selected Function**.
    v. In the formula, highlight **picklist_field**
    vi. Click **Insert Field**, select **Stage** from the second list on the Insert Field overlay that appears, and then click **Insert**.
    vii. In the formula, highlight **text_literal** and enter “`Closed Won`” (including the quotation marks).
    viii. In the formula, highlight **Amount * 0.1** and cut it (**CTRL+X**).
    ix. In the formula, highlight **value_if_true** and paste (**CTRL+V**).
    x. In the formula, highlight **value_if_false** and enter `0`.
    xi. Click **Check Syntax**.

D. Click **Save**.
E. Click the **Opportunities** tab.
F. From the View picklist, select **All Opportunities**, and then click **Go!**
G. In the Opportunity Name column, click **ACME – 700 Desktops**.

   Notice that the commission is now zero because the opportunity is not won.

H. Click the **Back to List: Opportunities** link.
I. In the Opportunity Name column, click **American Package – Desktops**.

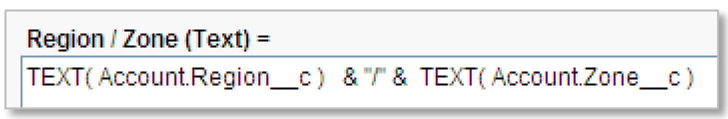
   Notice that the commission is now displayed because the opportunity is won.

3. Create a custom formula field on the Opportunity object that displays the Region and Zone information from the account record.

   A. Click **Setup | Customize | Opportunities | Fields**.
   B. In the Opportunity Custom Fields & Relationships list, click **New**.
   C. In Step 1, select **Formula**, and then click **Next**.
   D. Complete the new field details in Step 2.

      i. Field Label: **Region / Zone**
      ii. Formula Return Type: **Text**

   E. Click **Next**.
   F. Complete the formula details in Step 3.



      i. Click the **Advanced Formula** tab if it is not already selected.
      ii. From the Functions list, select **TEXT**, and then click **Insert Selected Function**.
      iii. In the formula, highlight **value**.
      iv. Click **Insert Field** and select **Account>** from the second list on the Insert Field overlay that appears.
      v. From the new list that appears, select **Region**, and then click **Insert**.
      vi. Click at the **end** of the formula to position the cursor, and then click **Insert Operator** and select **&Concatenate**.
      vii. At the end of the formula, enter "/" (including the quotation marks).
      viii. Click **Insert Operator**, and then select **&Concatenate**.
      ix. From the Functions list, select **TEXT**, and then click **Insert Selected Formula**.
      x. In the formula, highlight **value**.
      xi. Click **Insert Field** and select **Account>** from the second list on the Insert Field overlay that appears.
      xii. From the new list that appears, select **Zone**, and then click **Insert**.

xiii. Click **Check Syntax**.
xiv. Description: `Displays the Region and Zone values from the account record.`
xv. Help Text: `Account region and zone.`

G. Click **Next**.
H. In Step 4, leave the field-level security settings unchanged and click **Next**.
I. Click **Save**.
J. Click the **Opportunities** tab.
K. From the View picklist, select **All Opportunities**, and then click **Go!**
L. In the Opportunity Name column, click **ABC - 10 Laptops**.

Notice that the region and zone information from the account is displayed.

5-8: Create Custom Formula Fields

Goal:

Sales reps at AW Computing sometimes apply discounts on opportunities. Allison Wheeler, VP of Global Sales, would like to see the discounted amount on each opportunity to enhance pipeline accuracy.

Tasks:

1. Create a formula field called Amount after Discount to calculate the amount after the discount has been applied. A custom percent field called Discount Percentage has already been created.
2. Test the new field on an opportunity.

Time:

10 minutes

Instructions:

1. Create a formula field called Amount after Discount to calculate the amount after the discount has been applied. A custom percent field called Discount Percentage has already been created.
   - A. Click **Setup | Customize | Opportunities | Fields**.
   - B. In the Opportunity Custom Fields & Relationships list, click **New**.
   - C. In Step 1, select **Formula**, and then click **Next**.
   - D. Complete the new field details in Step 2.
     - i. Field Label: `Amount after Discount`
     - ii. Formula Return Type: **Currency**
   - E. Click **Next**.
   - F. Complete the formula details in Step 3.
     - i. Click the **Simple Formula** tab. (Note: Formula will be built in the large text box named Amount after Discount (Currency)=.)
     - ii. From the Insert Merge Field picklist, select **Amount**.
     - iii. Click **Insert Operator** and select ***Multiply**.
     - iv. Click **Insert Operator** and select **(Open Parenthesis**.
     - v. After the open parenthesis, enter `1`
     - vi. Click **Insert Operator** and select **-Subtract**.
     - vii. From the Insert Merge Field picklist, select **Discount Percentage**.
     - viii. Click **Insert Operator** and select **)Close Parenthesis**.
     - ix. Click **Check Syntax**.

x. Description: `Calculates the opportunity amount after any discount has been applied.`
xi. Help Text: `Opportunity amount after discount has been applied.`
xii. Click **Next**.

G. In Step 4, leave the field-level security settings unchanged and click **Next**.
H. Click **Save**.

2. Test the new field on an opportunity.

A. Click the **Opportunities** tab.
B. From the View picklist, select **All Opportunities**, and then click **Go!**
C. In the Opportunity Name column, click **ACME – 700 Desktops**.
D. Double-click the **Discount Percentage** field and enter `10`
E. Click **Save**. The Amount after Discount field should now display the opportunity amount after the discount has been applied.

5-9: Create Page Layouts

Goal:

Allison Wheeler, VP of Global Sales, would like a new page layout for customer accounts to better organize the display of fields and related lists.

Tasks:

1. Modify the default account page layout to display sales region and support plan information in separate sections.
2. Make the Rating field required.
3. Add the Mobile and Do Not Call columns to the Contacts related list.
4. Move the Opportunities related list to the top.
5. Preview the layout and save it as Customer Account Layout.
6. Assign the layout to all profiles and test it.

Time:

10 minutes

Instructions:

1. Modify the default account page layout to display sales region and support plan information in separate sections.
   A. Click **Setup | Customize | Accounts | Page Layout**.
   B. In the Action column, click **Edit** to modify the default account layout.
   C. From the palette at the top, drag the **Section** element onto the page layout and drop it just above the Additional Information section.
      i. Section Name: `Sales Region`
      ii. Layout: **2-Column**
      iii. Tab-key Order: **Left-Right**
      iv. Click **OK**.
   D. From the palette at the top, click the **Section** element, drag it onto the page layout, and drop it just above the Additional Information section.
      i. Section Name: `Support Plan Information`
      ii. Layout: **2-Column**
      iii. Tab-key Order: **Left-Right**
      iv. Click **OK**.
   E. Arrange the fields.
      i. From the Account Information section, drag the **Region** field into the left

column of the new Sales Region section.
   ii. From the Account Information section, drag the **Zone** field into the right column of the new Sales Region section.
   iii. From the Account Information section, drag the **Has Support Plan** field into the left column of the new Support Plan Information section.
   iv. From the Account Information section, drag the **Support Plan Expiration Date** field into the right column of the new Support Plan Information section.
   v. From the Additional Information section, drag the **Support Level** field into the left column of the new Support Plan Information section.

2. Make the Rating field required.
   A. In the Account Information section, hover over the **Rating** field and click the **properties** button (wrench) that appears.
   B. In the Field Properties area, select **Required**, and then click **OK**.
3. Add the Mobile and Do Not Call columns to the Contacts related list.
   A. Scroll down to the Contacts related list and click the **properties** button (wrench) on the gray bar above it.
   B. From the Available Fields list, select **Mobile** and **Do Not Call** (hold **CTRL** to select both at the same time).
   C. Click **Add.**
   D. Scroll down to bottom of the Related List Properties – Contact pop-up. (Note: If you see **Apply column information to other page layouts,** make sure only Customer Account Layout and clear any other page layout.)
   E. Click **OK**.
4. Move the Opportunities related list to the top.
   A. Scroll down to the Opportunities related list.
   B. Click the **gray bar** above the related list and drag it above the Contacts related list.
5. Preview the layout and save it as `Customer Account Layout`.
   A. At the top of the editor, click **Preview As...** and select **Sales User**.
   B. On the preview, click **Close**.
   C. Click the **arrow** part of the Save button, and select **Save As...**
   D. Complete the save details.
      i. Page Layout Name: `Customer Account Layout`
      ii. Click **Save**.
6. Assign the layout to all profiles and test it.
   A. Click **Setup | Customize | Accounts | Page Layouts**.
   B. Click **Page Layout Assignment**.

C. Click **Edit Assignment**, and then complete the assignment screen.
   i. In the Profiles column, hold **SHIFT** and click **Consulting User** and **VAR User**. This should also select all profiles in between.
   ii. Page Layout To Use: **Customer Account Layout**
D. Click **Save**.
E. From the Force.com App Menu, select **Sales**.
F. Click the **Accounts** tab.
G. From the View picklist, select **All Accounts**, and then click **Go!**
H. In the Account Name column, click **ABC Labs**. You should now see the account using the Customer Account page layout.

5-10: Create a Partner Account Page Layout

Goal:

Noah Larkin, VP of Services, would like a new page layout for consulting users for when they are working with partner accounts. He would like all sales-related information removed.

Tasks:

1. Create a new account layout called Partner Account Layout by cloning the default account layout.
2. Remove the Rating, Region, Zone, Has Support Plan, and Support Plan Expiration Date fields.
3. Add the Mobile column to the Contacts related list.
4. Remove the Opportunities related list.
5. Preview the layout and save it.
6. Assign the layout to the Consulting User profile and test it.

Time:

10 minutes

Instructions:

1. Create a new account layout called Partner Account Layout by cloning the default account layout.
   A. Click **Setup | Customize | Accounts | Page Layout**.
   B. Click **New**, and then complete the Create New Page Layout page.
      i. Existing Page Layout: **Account Layout**
      ii. Page Layout Name: `Partner Account Layout`
   C. Click **Save**.
2. Remove the Rating, Region, Zone, Has Support Plan, Support Plan Expiration Date, and Support Level fields.
   A. Hold down **CTRL** and click on each of the fields to select them.

      Rating
      Region
      Zone
      Has Support Plan
      Support Plan Expiration Date
      Support Level

   B. Drag the selected fields into the palette at the top of the editor.

3. Add the Mobile column to the Contacts related list.

   A. Scroll down to the Contacts related list and click the **properties** button (wrench) on the gray bar above it.
   B. Complete the properties as follows:

      i. From the Available Fields list, select **Mobile**.
      ii. Click **Add**.
      iii. Click **OK**.

4. Remove the Opportunities related list.

   A. Scroll down to the Opportunities related list.
   B. Click the **Remove** button on the gray bar above the related list.

5. Preview the layout and save it.

   A. At the top of the editor, click **Preview As…** and select **Consulting User**.
   B. On the preview, click **Close**.
   C. Click **Save**.

6. Assign the layout to the Consulting User profile.

   A. Click **Page Layout Assignment**.
   B. Click **Edit Assignment**, and then complete the assignment screen.

      i. In the Profiles column, select **Consulting User** and **System Administrator** (for testing purposes). Hold **CTRL** to select both at the same time.
      ii. Page Layout To Use: **Partner Account Layout**

   C. Click **Save**.
   D. Click the **Accounts** tab.
   E. From the View picklist, select **All Accounts**, and then click **Go!**
   F. In the Account Name column, click **Dewey, Cheattem, & Howe**. You should now see the account using the Partner Account page layout.
   G. Click **Setup | Customize | Accounts | Page Layouts**.
   H. Click **Page Layout Assignment**.

      i. Click **Edit Assignment**, and then complete the assignment screen.
      ii. In the Profiles column, select **System Administrator**.
      iii. Page Layout To Use: **Customer Account Layout**

   I. Click **Save**.

5-11: Create a Customer Account Record Type

Goal:

Consulting users still need to be able to see the appropriate page layout when working with customer accounts. You need to create a customer account record type for consulting users to view customer accounts and for sales users to create them.

Tasks:

1. Create a new account record type called Customer Account.
2. Assign the record type to the Consulting User, Executive User, Sales User, and System Administrator profiles.
3. Apply the Customer Account Layout to all profiles in the record type.
4. Edit the Type picklist values to ensure only Customer and Prospect are available.
5. Log in as Phil Smith, and create a new account to test the record type.

Time:

10 minutes

Instructions:

1. Create a new account record type called Customer Account.
   A. Click **Setup | Customize | Accounts | Record Types**.
   B. Click **New**.
   C. Complete the new record type details in Step 1.
      i. Existing Record Type: **Master**
      ii. Record Type Label: `Customer Account`
      iii. Description: `For customers and prospects.`
      iv. Active: **Select**
2. Assign the record type to the Consulting User, Executive User, Sales User, and System Administrator profiles.
   A. In the Enable for Profile column header, clear the **checkbox**.
   B. In the Enable for Profile column, select the following profiles:

      Consulting User
      Executive User
      Sales User
      System Administrator
   C. Click **Next**.
3. Apply the Customer Account Layout to all profiles in the record type.

   A. In Step 2, ensure that the **Apply one layout to all profiles** radio button is selected.
   B. From the Select Page Layout list, select **Customer Account Layout**.
   C. Click **Save**.

4. Edit the Type picklist values to ensure only Customer and Prospect are available.

   A. In the Action column, click **Edit** next to the Type field, and then edit the picklist values.

      i. In the Selected Values list, hold down **CTRL** and select all values except Customer and Prospect.
      ii. Click **Remove**.
      iii. Default: **Customer**

   B. Click **Save**.

5. Log in as Phil Smith, and create a new account to test the record type.

   A. Click **Setup | Manage Users | Users**.
   B. In the Action column, click **Login** next to Smith, Phil.
   C. Click the **Accounts** tab.
   D. Click **New**, and note the following:

      i. The new account record displays using the Customer Account page layout.
      ii. The Type field displays only the Customer and Prospect values.

   E. Click **Phil Smith | Logout**.

5-12: Create a Partner Account Record Type

Goal:

Noah Larkin, VP of Services, would like consulting users to be able to see the appropriate page layout and picklist values whenever they create, view, or edit partner accounts.

Tasks:

1. Create a new account record type called Partner Account.
2. Assign the record type to the Consulting User, Executive User, and System Administrator profiles.
3. Apply the Partner Account Layout to all profiles in the record type.
4. Edit the Industry picklist values to include only Consulting and Education.
5. Edit the Type picklist values to include only Analyst, Integrator, Partner, and Other.
6. Login as Rebecca Sanders, and create a new account to test the record type.

Time:

15 minutes

Instructions:

1. Create a new account record type called Partner Account.
   A. Click **Setup | Customize | Accounts | Record Types**.
   B. Click **New**.
   C. Complete the new record type details in Step 1.
      i. Existing Record Type: **Master**
      ii. Record Type Label: `Partner Account`
      iii. Description: `For consulting partners.`
      iv. Active: **Select**
2. Assign the record type to the Consulting User, Executive User, and System Administrator profiles.
   A. In the Enable for Profile column, select the following profiles:

      Consulting User
      Executive User
      System Administrator

   B. In the Make Default column, select **Consulting User**.
   C. Click **Next**.
3. Apply the Partner Account Layout to all profiles in the record type.

   A. In Step 2, ensure that the **Apply one layout to all profiles** radio button is selected.
   B. From the Select Page Layout list, select **Partner Account Layout**.
   C. Click **Save**.

4. Edit the Industry picklist values to include only Consulting and Education.

   A. In the Action column, click **Edit** next to the Industry field, and then edit the picklist values.

      i. In the Selected Values list, hold down **SHIFT** and select the **first** value and the **last** value. This will select all values in the list.
      ii. Hold down **CTRL** and click **Consulting** and **Education** to deselect them.
      iii. Click **Remove**.

   B. Default: **Consulting**
   C. Click **Save**.

5. Edit the Type picklist values to include only Analyst, Integrator, Partner, and Other.

   A. In the Action column, click **Edit** next to the Type field, and then edit the picklist values.

      i. In the Selected Values list, hold down **CTRL** and select all values except Analyst, Integrator, Partner, and Other.
      ii. Click **Remove**.

   B. Default: **Partner**
   C. Click **Save**.

6. Login as Rebecca Sanders, and create a new account to test the record type.

   A. Click **Setup | Manage Users | Users**.
   B. In the Action column, click **Login** next to Rebecca Sanders.
   C. If any Chatter screens appear, close them.
   D. Click the **Accounts** tab.
   E. Click **New**.

   Notice that Rebecca can now choose what record type to select, as she has both assigned to her profile.

   F. Click **Continue**, and note the following:

      i. The new account record displays using the Partner Account page layout.
      ii. The Type and Industry fields display only the appropriate values.

   G. Click **Rebecca Sanders | Logout**.

5-13: Create a B2C Business Process and Record Type

Goal:

Allison Wheeler, VP of Global Sales, would like her sales teams to have access to separate opportunity record types for business-to-consumer (B2C) and business-to-business (B2B) sales, each with its own specific business process, page layout, and picklist values. Separate B2C and B2B page layouts have already been created.

Tasks:

1. Add Initial Contact and Quote Given to the opportunity Stage master picklist.
2. Create a new B2C sales process with the values: Initial Contact, Quote Given, Closed Won, Closed Lost.
3. Create a new B2C record type using the B2C sales process and page layout, and assign it to the Executive User, Sales User, and System Administrator profiles.
4. Edit the Lead Source picklist to remove the Partner, Public Relations, and Seminar – Partner values.
5. Login as Phil Smith and create a new opportunity to test the record type.

Time:

15 minutes

Instructions:

1. Add Initial Contact and Quote Given to the opportunity Stage master picklist.
   A. Click **Setup | Customize | Opportunities | Fields**.
   B. In the Field Label column, click **Stage**.
   C. In the Opportunity Stages Picklist Values list, click **New**, and add a stage.
      i. Stage Name: `Initial Contact`
      ii. Probability: `10`
      iii. Leave all other values as defaults.
   D. Click **Save & New**.
   E. Add another new stage as follows:
      i. Stage Name: `Quote Given`
      ii. Probability: `50`
   F. Click **Save**.
   G. In the Opportunity Stages Picklist Values list, click **Reorder**, and reorder the values.
      i. In the Stage Name list, hold down **CTRL** and select **Initial Contact** and **Quote Given**.

ii. Click **Top**.

H. Click **Save**.

2. Create a new B2C sales process with the values: Initial Contact, Quote Given, Closed Won, Closed Lost.

A. Click **Setup | Customize | Opportunities | Sales Processes**.
B. Click **New**, and complete the sales process details.

i. Existing Sales Process: **Master**
ii. Sales Process Name: `B2C Sales Process`
iii. Description: `Opportunity stages for B2C sales.`

C. Click **Save**.
D. From the Selected Values list, remove the unwanted values.

i. Hold down **SHIFT** and select **Prospecting** and **Negotiation/Review**. This should also select all values in between.
ii. Click **Remove**.

E. Click **Save**.

3. Create a new B2C record type using the B2C sales process and page layout, and assign it to the Executive User, Sales User, and System Administrator profiles.

A. Click **Setup | Customize | Opportunities | Record Types**.
B. Click **New**.
C. Complete the new B2C record type details in Step 1.

i. Existing Record Type: **Master**
ii. Record Type Label: `B2C Sales`
iii. Sales Process: **B2C Sales Process**
iv. Description: `Use to create consumer opportunities.`
v. Active: **Select**
vi. In the Enable for Profile column header, clear the **checkbox**.
vii. In the Enable for Profile column, select the following profiles:

Executive User
Sales User
System Administrator

D. Click **Next**.
E. In Step 2, ensure that the **Apply one layout to all profiles** checkbox is selected.
F. From the Select Page Layout list, select **B2C Opportunity Layout**.
G. Click **Save**.

4. Edit the Lead Source picklist to remove the Partner, Public Relations, and Seminar –

Partner values.

A. In the Action column, click **Edit** next to the Lead Source field, and then edit the picklist values.
B. In the Selected Values list, hold down **CTRL** and select the **Partner**, **Public Relations**, and **Seminar – Partner** values.
C. Click **Remove**.
D. Click **Save**.

5. Log in as Phil Smith, and create a new opportunity to test the record type.

A. Click **Setup | Manage Users | Users**.
B. In the Action column, click **Login** next to Phil Smith.
C. Click the **Opportunities** tab.
D. Click **New**.

Notice that Phil is only able to create a B2C opportunity, as this is the only opportunity record type assigned to his profile.

E. Click into the **Stage** and **Lead Source** picklists to ensure they contain the appropriate B2C values.
F. Click **Phil Smith | Logout**.

5-14: Create a B2B Business Process and Record Type

Goal:

Allison Wheeler, VP of Global Sales, would like her sales teams to have access to separate opportunity record types for business-to-consumer (B2C) and business-to-business (B2B) sales, each with its own specific business process, page layout, and picklist values. Separate B2C and B2B page layouts have already been created.

Tasks:

1. Create a new B2B sales process with all values except Initial Contact and Quote Given.
2. Create a new B2B record type using the B2B sales process and page layout, and assign it to the Executive User, Sales User, and System Administrator profiles.
3. Login as Phil Smith and create a new opportunity to test the record type.

Time:

10 minutes

Instructions:

1. Create a new B2B sales process with all values except Initial Contact and Quote Given.
   A. Click **Setup | Customize | Opportunities | Sales Processes**.
   B. Click **New**, and complete the sales process details.
      i. Existing Sales Process: **Master**
      ii. Sales Process Name: `B2B Sales Process`
      iii. Description: `Opportunity stages for B2B sales.`
   C. Click **Save**.
   D. From the Selected Values list, remove the unwanted values as follows:
      i. Hold down **CTRL** and select **Initial Contact** and **Quote Given**.
      ii. Click **Remove**.
   E. Click **Save**.
2. Create a new B2B record type using the B2B sales process and page layout, and assign it to the Executive User, Sales User, and System Administrator profiles.
   A. Click **Setup | Customize | Opportunities | Record Types**.
   B. Click **New**.
   C. Complete the new B2B record type details in Step 1.
      i. Existing Record Type: **Master**
      ii. Record Type Label: `B2B Sales`

iii. Sales Process: **B2B Sales Process**
iv. Description: `Use to create business-to-business opportunities.`
v. Active: **Select**
vi. In the Enable for Profile column, select the following profiles:

Executive User
Sales User
System Administrator

vii. In the Make Default column heading, select the **checkbox**.
viii. Click **Next**.

D. In Step 2, ensure that the **Apply one layout to all profiles** checkbox is selected.
E. From the Select Page Layout list, select **B2B Opportunity Layout**.
F. Click **Save**.

3. Login as Phil Smith, and create a new opportunity to test the record type.

A. Click **Setup | Manage Users | Users**.
B. In the Action column, click **Login** next to Phil Smith.
C. Click the **Opportunities** tab.
D. Click **New**.

Notice that Phil can now choose what record type to select, as he has both assigned to his profile.

E. Select **B2B Sales**, and then click **Continue**.
F. Click into the **Stage** picklist to ensure it contains the appropriate B2B values.
G. Click **Phil Smith | Logout**.

5-15: Enable Account Field History Tracking

Goal:

Noah Larkin, VP Support, would like to know which accounts are being marked as having support plans each week, so that he can track which accounts do not have a support plan expiration date.

Tasks:

1. Enable field history tracking on accounts, and set it to track the Has Support Plan and Support Plan Expiration Date fields.
2. Add the Account History related list to the Customer Account page layout.
3. For testing purposes, mark two accounts as having support plans, but only enter an expiration date for one of them.
4. Run the Account History report for this week.

Time:

15 minutes

Instructions:

1. Enable field history tracking on accounts, and set it to track the Has Support Plan and Support Plan Expiration Date fields.
   A. Click **Setup | Customize | Accounts | Fields**.
   B. Click **Set History Tracking**.
   C. Select **Enable Account History**, and then select the following fields to track:

      Has Support Plan
      Support Plan Expiration Date

   D. Click **Save**.
2. Add the Account History related list to the Customer Account page layout.
   A. Click the **Accounts** tab.
   B. From the View picklist, select **All Accounts**, and then click **Go!**
   C. In the Account Name column, click **Acme Inc**.
   D. Click the **Edit Layout** link at the top of the record detail page. (Click **Close** if prompted to play the video tutorial.)
   E. On the left side of the palette at the top, click **Related Lists**.
   F. From the palette, drag the **Account History** related list onto the page layout and drop it below the Contacts related list.
   G. Click **Save**.

H. Click **No** when prompted to overwrite users' related list customizations.

3. For testing purposes, mark two accounts as having support plans, but only enter an expiration date for one of them.

   A. On the Acme Inc. account record, double-click **Has Support Plan** and select the **checkbox**.
   B. Double-click **Support Plan Expiration Date** and enter the date one year from today.
   C. Click **Save**.
   D. At the top of the record, hover over the **Account History** related list link to view the two field changes.
   E. At the top of the record, click **Back to List: Accounts**.
   F. In the Account Name column, click **American Bank**.
   G. Double-click **Has Support Plan** and select the **checkbox**.
   H. Click **Save**.
   I. Hover over the **Account History** related list link to view the change.

4. Run the Account History report for this week.

   A. Click the **Reports** tab.
   B. Next to Account and Contact Reports, click the **arrow** to expand the folder.
   C. Click **Account History Report**.

      i. From the Show picklist, select **All Accounts**.
      ii. From the Range picklist, select **This Week**.

   D. Click **Run Report** to view the field changes you have made.

5-16: Create an Account Validation Rule

Goal:

Noah Larkin, VP Services, wants to ensure that all users enter the Support Plan Expiration Date whenever the Has Support Plan checkbox is selected on an account.

Tasks:

1. Create an account validation rule to force users to enter a Support Plan Expiration Date when Has Support Plan is selected.
2. Test the new rule on an existing account record.

Time:

10 minutes

Instructions:

1. Create an account validation rule to force users to enter a Support Plan Expiration Date when Has Support Plan is selected.

   A. Click **Setup | Customize | Accounts | Validation Rules**.
   B. Click **New**, and then complete the validation rule.

      i. Rule Name: `Support plan expiration date required`
      ii. Active: **Select**
      iii. Description: `Support plan expiration date is required when account is marked as having support plan.`
      iv. Error Condition Formula:
      `Has_Support_Plan__c = True && ISBLANK( Support_Plan_Expiration_Date__c )`

      v. Click **Check Syntax** to ensure you have no errors.
      vi. Error Message: `You must enter an expiration date when account has a support plan.`
      vii. Error Location: **Field**
      viii. Field: **Support Plan Expiration Date**

   C. Click **Save**.

2. Test the new rule on an existing account record.
   A. Click the **Accounts** tab.
   B. From the View picklist, select **All Accounts**, and then click **Go!**
   C. In the Account Name column, click **AMP Industries**.
   D. Double-click the **Has Support Plan** field and select the **checkbox**.
   E. Click **Save**. You should now see the error message below the Support Plan Expiration Date field.
   F. In the Support Plan Expiration Date field, enter the date one year from today.
   G. Click **Save**. You should be able to save the record without any error messages.

5-17: Create an Opportunity Validation Rule

Goal:

Allison Wheeler, VP Global Sales, would like to ensure that sales reps enter a Close Reason whenever an opportunity is lost.

Tasks:

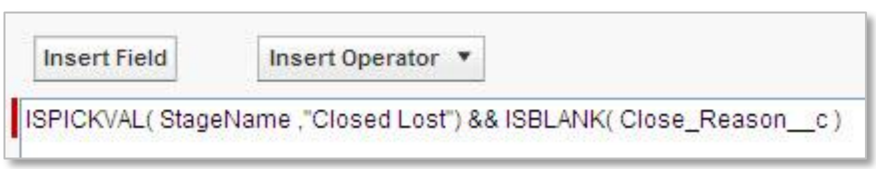
1. Create an opportunity validation rule to force users to enter a Close Reason when the opportunity Stage is Closed Lost.
2. Test the new rule on an existing opportunity record.

Time:

10 minutes

Instructions:

1. Create an opportunity validation rule to force users to enter a Close Reason when the opportunity Stage is Closed Lost.
   A. Click **Setup | Customize | Opportunities | Validation Rules**.
   B. Click **New**, and then complete the validation rule as follows:
      i. Rule Name: `Close reason required when lost`
      ii. Active: **Select**
      iii. Description: `A close reason is required when opportunity is closed lost.`
      iv. Error Condition Formula:
      `ISPICKVAL( StageName ,"Closed Lost")  &&  ISBLANK( Close_Reason__c )`



      v. Click **Check Syntax** to ensure you have no errors.
      vi. Error Message: `You must enter a close reason when opportunity is closed lost.`
      vii. Error Location: **Field**
      viii. Field: **Close Reason**
   C. Click **Save**.

2. Test the new rule on an existing opportunity record.

   A. Click the **Opportunities** tab.
   B. From the View picklist, select **All Opportunities**, and then click **Go!**
   C. In the Opportunity Name column, click **Arbuckle – 12 Laptops**.
   D. Double-click the **Stage** field, and from the Stage picklist, select **Closed Lost**.
   E. Click **OK**.
   F. Click **Save**. You should now see the error message below the Close Reason field.
   G. Double-click the **Close Reason** field, and select **Lost to Competitor**.
   H. Click the **arrow** to move this value from the Available column to the Chosen column.
   I. Click **OK**.
   J. Click **Save**. You should be able to save the record without any error messages.

