

Activity #4

SF Admin Basics Challenge - 4

UC #21: Create the following custom fields on “**Lead**” object

- Is Partner Hotel (Type: Checkbox)
- Hotel Category (Type: Picklist | Values : 2 star, 3 star, 4 star, 5 star, 7 star)

UC #22: Use Data loader options in SF and upload “New Leads.csv”. Create sample records and load

UC #23: From the lead data uploaded in above step, select the following leads from UI and convert into account, contact and opportunity

Lead #1: Noah Wilson

Lead #2: Ethan Roberts

Activity #5

UC #1: Create a discount obj. to manage discounts and its percentage. Sample data like Monthly discount, Diwali discount, Christmas discount etc

UC #2: Use data loader and load at least 25 discount records

UC #3: Use data loader and load at least 25 new account records

UC #4: Configure the system in a way to manage multiple discounts for an account. It is possible to associate same discount to multiple accounts

UC #5: Use data loader and load records (account & discount)

UC #6: Create a new user having profile Sales Operations Head having Sales Head Role

UC #6.1: Create a new user having profile Marketing Operations Head having Marketing Head Role

UC #6.2: Create a new user having profile Sales Manager having Sales Rep Role

UC #7: When Discount % is set > 5% , system should trigger approval to Sales Operations Head

UC #8: When a discount is mapped to account ensure the consolidated sum of discounts should not exceed 30%

For e.g: A1 - D1 - 10% , A1 - D2 - 15%

Now, Adding A1 - D3 - 10% should result in error

UC #9: Create a component using screen flow to show list of accounts having consolidated discount % > 20 %

UC #10: Create a component using LWC to show list of accounts and discounts. Add the component on home page

UC #11: Ensure Account and Discount records created by Sales Rep or Sales Operations head are not visible for Marketing Operations head

UC #12: Ensure Account and Discount records created by Marketing Operations head are not visible for Sales Rep or Sales Operations head

UC #13: Ensure Account and Discount records created by Sales Rep are visible to Sales Operations head. Whereas, account and discount records created by Sales Operations head should not be visible to Sales Rep and Marketing operations head