

## Activity #3

# SF Admin Basics Challenge - III

UC #17: Send an email to contact from Salesforce org indicating that there are few onboarding documents to be dully sign in and send via courier back to Travel Hut office

- Ensure the email has details abt the onboarding documents
- Ensure address information is added in the email body

UC #19: Create custom fields on “**Account**” object

- Field Name: Onboarding Status (Should have a value Yet to Start, Initiated, Document Verification, Legal Verification, Finance Verification, Field Verification, Rejected, Completed)
- Field Name: Onboarding Status Additional Comments (Should capture multi line text)
- Ensure that this field is visible on the screen only when Contact Type is ‘Business Contact’ and ‘Onboarding initiated’ check box is selected

UC #18: Create a custom field on “**Contact**” object

- Onboarding Documents Tracking #
- Ensure that this field is visible on the screen only when Contact Type is ‘Business Contact’ and ‘Onboarding Status’ on account is not marked as ‘Yet to Start’ & ‘Rejected’

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UC #19: Use Data Import Wizard or Data Loader to upload the following datasets

- AccountsAndContacts - Distinct
- AccountsAndContacts - Additional Contacts
- Hotel Reviews

UC #20: Ensure 'Export' option is disabled for all users other than system admin profile users

UC #21: Configure the system in order to store customer contacts check-in details. Should be able to capture

- Check in date
- Check out date
- Check in month
- Bill Paid
- Room Type

Also, ensure that the system should provide a way to relate cases raised by customers that stayed in the resort