

# SF Admin Basics Challenge - I

## What you need

1. Trailhead playground

## Challenge

UC #1: Enable **login as option policy** to proxy user from setup

UC #2 : Clone “Standard platform User” profile and give a name “**Custom:Standard platform user – Partner Operations**”

UC #3 : Clone “Standard platform User” profile and give a name “**Custom:Standard platform user – Sales Manager**”

UC #4 : Create 2 new users

**User 1 name** -“Roger Willson”

**User 2 name** -“Daniel Crook”

**profile:** “Custom:Standard platform user - Sales Manager”

**License:** Salesforce Platform

UC #5 : Create a new user

**name** -“Jennie Romanoff”

**profile:** “Custom:Standard platform user - Partner Operations”

**License:** Salesforce Platform

# SF Admin Basics Challenge - I

UC #6 : Create a **new app** named **“Hotel Review & Analysis”**. **Ensure** the following navigation links are present in the app

- **Account, Contact & Report**

UC #7 : Ensure **“Hotel Review & Analysis”** app is accessible only by users having profile: “Custom:Standard platform user - Partner Operations”

# SF Admin Basics Challenge - II

## What you need

1. Trailhead playground

## Challenge

UC #1 : Clone “Standard platform User” profile and give a name “**Custom:Standard platform – Sales Team Member**”

UC #2 : Create 2 new users

**User 1 name** -“Duke Detain”

**User 2 name** -“Mike Harly”

**profile:** “Custom:Standard platform - Sales Team Member”

**License:** Salesforce Platform

UC #3: Create a custom object named “**Hotel Reviews**” with the below fields

- Reviewer (Type: should have relationship with Contact object)
- Hotel (Type: should have relationship with Account object)
- Rating (Type: picklist with values 1,2,3,4,5)
- Review Comments (Type: Text Area)

UC #4: Create a **custom tab** for “**Hotel Reviews**” and include the same in “**Hotel Review & Analysis**” app

# SF Admin Basics Challenge - II

UC #5: Ensure “**Hotel Reviews**” tab is visible for users having the below profile

- Custom:Standard platform user – Partner Operations
- Custom:Standard platform user – Sales Manager
- Custom:Standard platform – Sales Team Member

UC #6: Create below custom fields on “**Account**” object

- Is Partner Hotel (Type: Checkbox)
- New Partner Enrollment Commission % (Type: Number)
- Partner Primary Relationship Manager (Type: Should have relationship with user object)
- Hotel Latitude (Type: Number)
- Hotel Longitude (Type: Number)

UC #7: Ensure custom field “**New Partner Enrollment Commission %**” on account is mandatory **ONLY** users having profile “**Custom:Standard platform user – Partner Operations**”

UC #8: Ensure custom field “**New Partner Enrollment Commission %**” on account is **READ ONLY** users having profile “**Custom:Standard platform user – Sales Manager**” / “**Custom:Standard platform – Sales Team Member**”

# SF Admin Basics Challenge - II

UC #9: Modify account layout and keep only the below fields

- Account name, Parent Account, Type, phone, website, billing address, shipping address, Is Partner Hotel,

Introduce a **new section named “Partner details”** for the below fields

- New Partner Enrollment Commission % , Partner Primary Relationship Manager
- Hotel Latitude, Hotel Longitude

UC #10: Create a new account **“List View”** named **“Partner Hotels”** to show accounts having “Is Partner Hotel” value true

UC #11: Update Account highlights panel to show **ONLY**

- Type, Phone, Website, Account Owner, Is Partner Hotel, Partner Primary Relationship Manager

The screenshot shows a Salesforce Account record for 'Gibson'. The header bar includes the account name 'Gibson' and a '+ Follow' button. Below the header, there are buttons for 'Expense', 'New Contact', and 'New Case'. The main content area displays a table with the following columns: Type, Phone, Website, Account Owner, Account Site, and Industry. The 'Type' column shows 'Prospect', and the 'Account Owner' column shows a user named 'Rajesh'.

Type	Phone	Website	Account Owner	Account Site	Industry
Prospect			Rajesh		

# SF Admin Basics Challenge - II

UC #12: Create a **new app named “Sales Zone”**. Ensure the following navigation links are present in the app

- Account, Contact, Lead, Campaign, Opportunity& Report

UC #13 : Create 2 new users

**User 1 name** -“Patrick Jane”

**User 2 name** -“Teresa Lisbon”

**profile:** “Custom:Standard - Sales Team Member NA”

**License:** Salesforce

UC #14: Create 2 new users

**User 1 name** -“Grace Van Pelt”

**User 2 name** -“Kimbal Cho”

**profile:** “Custom:Standard - Sales Team Member EU”

**License:** Salesforce

UC #15: Create 2 new users

**User 1 name** -“Vega Amber”

**User 2 name** -“Jason Wyle”

**profile:** “Custom:Standard – Global Sales Operations”

**License:** Salesforce

## SF Admin Basics Challenge - II

UC #14: Create below custom fields on “**Contact**” object

- Contact Type (Should have 2 values business contact , customer contact)
- Best Time to Contact (Should have value 9 A.M – 6 P.M , 6 A.M – 12 P.M, 12 P.M – 6 P.M)
- Email Opt Out (check box)
- Phone Opt Out (check box)
- Marketing Opt Out (check box)

UC #15: Introduce 2 different layouts on contact object named

- Business Contact
  - Should have fields Salutation, Name, Phone, Account Name, Best Time To Contact
- Customer Contact
  - Should have fields Salutation, Name, Phone, Email, Account Name, Email Opt Out, Phone Opt Out, Marketing Opt Out,

UC #16: Ensure users having “Custom:Standard – Global Sales Operations” should see Customer Contact layout and other users should see Business Contact