

SF Admin Basics Challenge

What you need

1. Trailhead playground

Challenge

UC #1 : Create a clone of “Standard platform User” profile and give a name “Custom:Standard platform user - Sales Operations”

UC #2 : Create a clone of “Standard platform User” profile and give a name “Custom:Standard platform user - Sales Manager”

Tip:



UC #3 : Create a new user

name - “Chris Evans”

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

License: Salesforce Platform

UC #4 : Create a new user

name - “Natasha Romanoff”

profile: “Custom:Standard platform user - Sales Operations”

License: Salesforce Platform

SF Admin Basics Challenge

Challenge

UC #5 : Create a custom object named “Account Intelligence” with the below fields

- Account Name (data type:Text: Mandatory - Yes)
- CEO Personal Phone (data type: Phone. Mandatory - No)
- Key decision maker(data type: text; Mandatory - Yes):
- Decision Maker Email (data type: email ; Mandatory - Yes)

UC #6 : Profile settings

Profile Name: Custom:Standard platform user - Sales Manager

Object Access: Account Intelligence (Read, create, Edit & View All)

Profile Name: Custom:Standard platform user - Sales Operations

Object Access: Account Intelligence (Read, create, Edit)

Tip: Refer sample output screen shot #3

UC #7 : Ensure default page layout is assigned to :Custom:Standard platform user - Sales Operations”

- Should show the below fields
 - Account Name
 - Key decision maker
 - Decision maker email

SF Admin Basics Challenge

Challenge

UC #7 : Create a new page layout for “Custom:Standard platform user - Sales Manager” . Provide name as “Account Intelligence Layout(Manager)”

- Ensure new page layout is assigned to :Custom:Standard platform user - Sales Manager” profile
- Should show all 4 fields
 - Account Name
 - Key decision maker
 - Decision maker email
 - CEO Email

Tip: Refer sample output screen shot #4

UC #8: Create a list view and show 3 custom fields and make it available for all users

Tip: Refer sample output screen shot #6

Enable login as option policy to proxy user and take screenshots to upload in MS forms link

SF Admin Basics Challenge - Results upload

Upload your final results here:- Will be closed by Feb 18, 2022 8 P.M IST

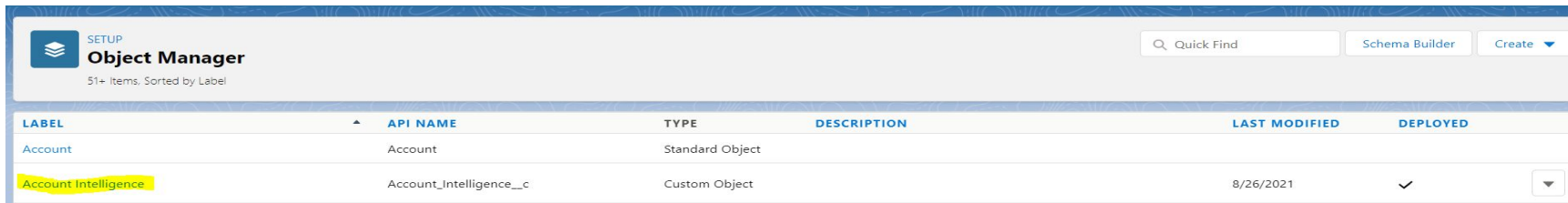
<https://forms.office.com/r/RyLc4FDrQr>

Points to remember:

1. Ensure you are uploading clear screen shots
2. Each screenshot from org should have org url clearly visible else your output will not be considered for evaluation and will be marked as incomplete in the final report

SF Admin Basics Challenge - Sample Output

#1

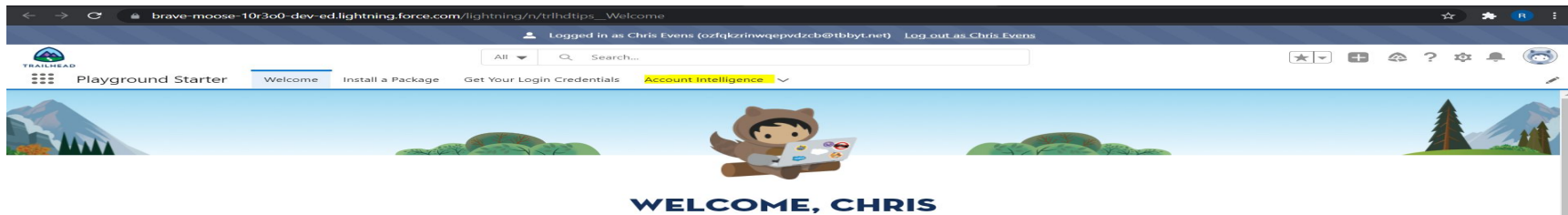


SETUP
Object Manager
51+ Items, Sorted by Label

Quick Find Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Account Intelligence	Account_Intelligence__c	Custom Object		8/26/2021	✓

#2



#3

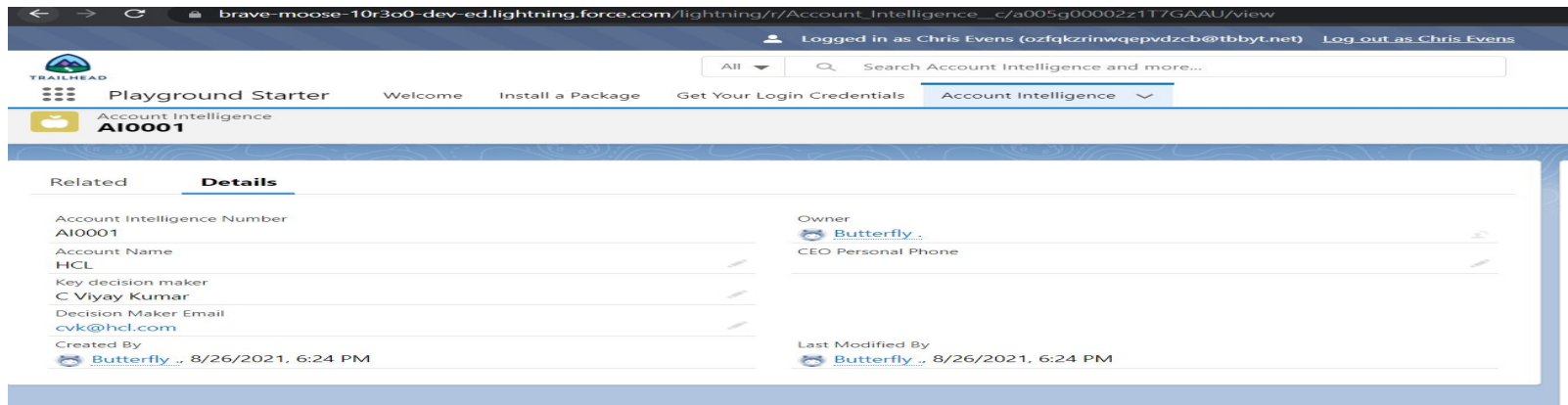


Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Account Intelligence	✓	✓	✓	<input type="checkbox"/>	✓	<input type="checkbox"/>

SF Admin Basics Challenge - Sample Output

#4:



The screenshot shows the Salesforce interface for Account Intelligence. The top navigation bar includes the Trailhead logo, 'Playground Starter', and links for 'Welcome', 'Install a Package', 'Get Your Login Credentials', and 'Account Intelligence'. The user is logged in as Chris Evens. The main content area displays the details for Account Intelligence Number AI0001. The details are organized into two columns. The left column lists: Account Intelligence Number (AI0001), Account Name (HCL), Key decision maker (C Vijay Kumar), Decision Maker Email (cvk@hcl.com), and Created By (Butterfly, 8/26/2021, 6:24 PM). The right column lists: Owner (Butterfly), CEO Personal Phone, and Last Modified By (Butterfly, 8/26/2021, 6:24 PM). Each item has an edit icon.

Trailhead
Playground Starter
Welcome Install a Package Get Your Login Credentials Account Intelligence

Account Intelligence
AI0001

Related Details

Account Intelligence Number
AI0001

Account Name
HCL

Key decision maker
C Vijay Kumar

Decision Maker Email
cvk@hcl.com

Created By
Butterfly, 8/26/2021, 6:24 PM

Owner
Butterfly

CEO Personal Phone

Last Modified By
Butterfly, 8/26/2021, 6:24 PM

#5

Page Layouts			Quick Find	New	Page Layout Assignment
2 Items, Sorted by Page Layout Name					
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY			
Account Intelligence Layout	Butterfly, 8/26/2021, 11:28 AM	Butterfly, 8/26/2021, 6:09 PM			
Account Intelligence Layout(Manager)	Butterfly, 8/26/2021, 6:13 PM	Butterfly, 8/26/2021, 6:13 PM			

SF Admin Basics Challenge - Sample Output

#6:

←


→

↺

brave-moose-10r3o0-dev-ed.lightning.force.com/lightning/o/Account_Intelligence__c/list?filterName=00B5g000000OGO38EAH

⏏

Logged in as Chris Evens (ozfqkzrinwqepvdzcb@tbbyt.net) [Log out as Chris Evens](#)

TRAILHEAD

⋮


Playground Starter

Welcome

Install a Package

Get Your Login Credentials

Account Intelligence ▾

Account Intelligence

Account Intelligence Report

⏏

0 items • Sorted by Account Intelligence Number • Filtered by My account intelligence • Updated a few seconds ago

🔍 Search this list...

⚙️ ▾

<input type="checkbox"/> Account Intelligence Number ↑ ▾	Account Name ▾	Decision Maker Email ▾	Key decision maker
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