SF Admin Basics Challenge

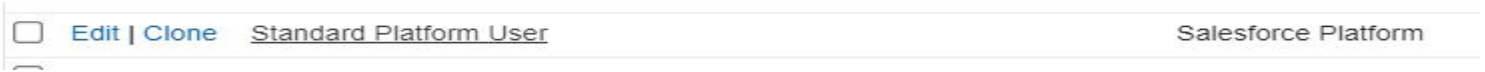
What you need

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

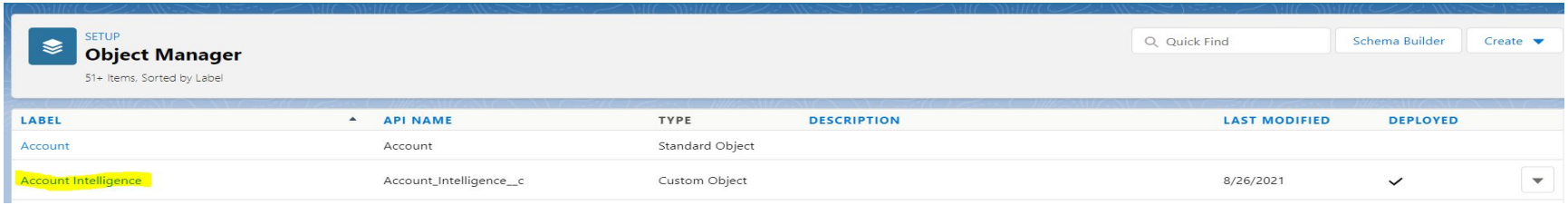
https://forms.office.com/r/RyLc4FDrQr

Points to remember:

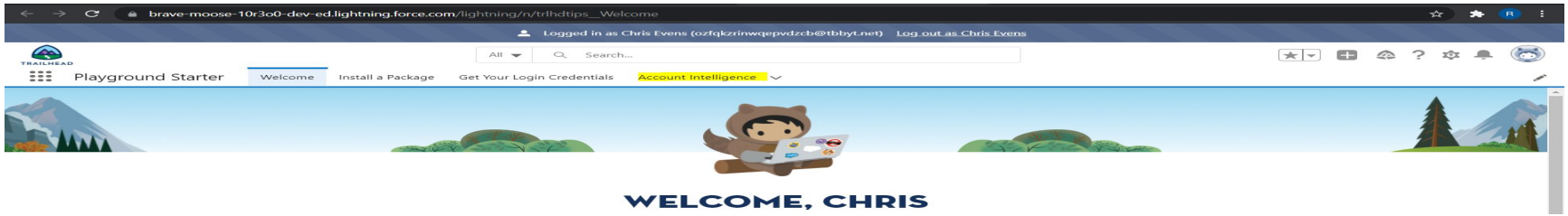
1. Ensure you are uploading clear screen shots
2. Each screenshot from org should have org url clearly visible else your output will not be considered for evaluation and will be marked as incomplete in the final report

SF Admin Basics Challenge - Sample Output

#1



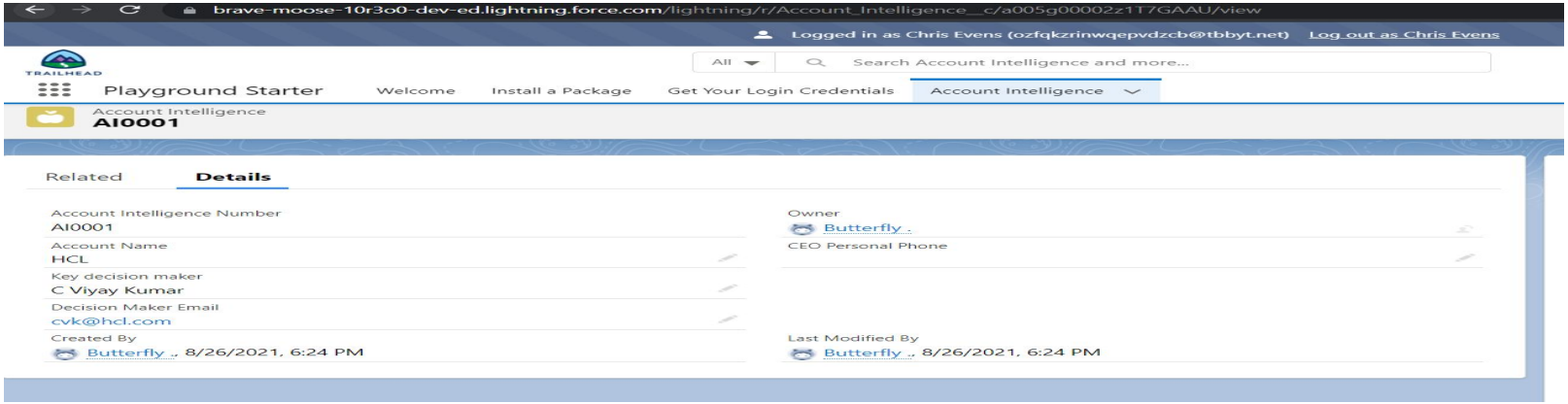
#2



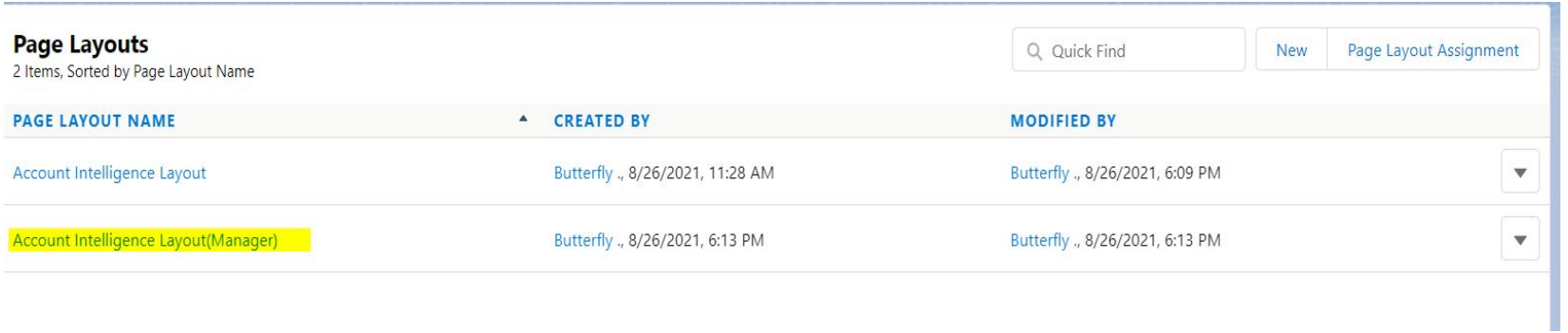
#3

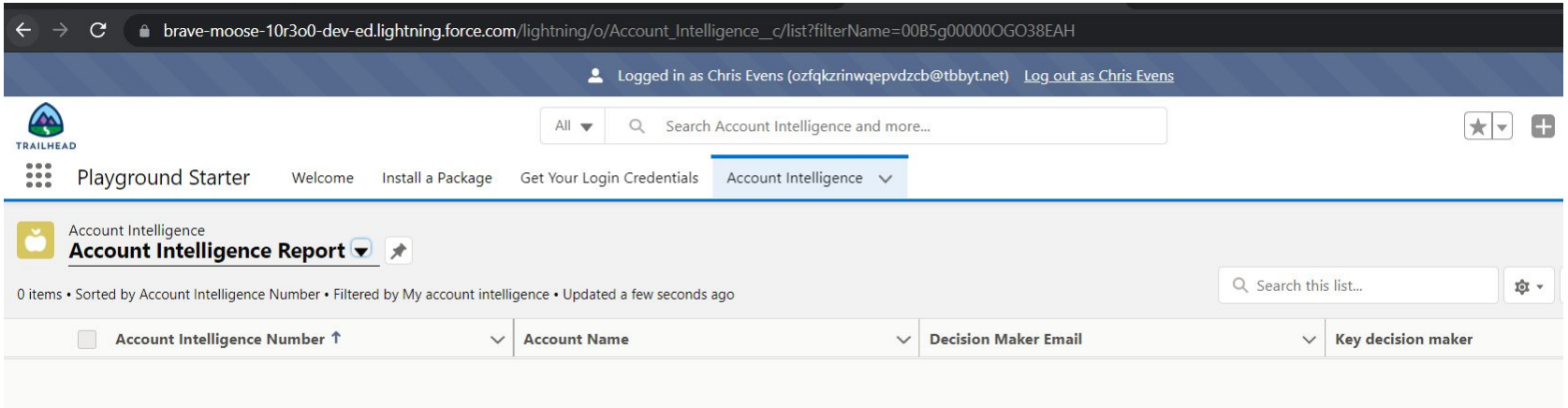
SF Admin Basics Challenge - Sample Output

#4:



#5



SF Admin Basics Challenge - Sample Output

#6: