##### Audit and Assurance Questionnaire

**Description:** When an opportunity or engagement has an Audit and Assurance related product, a set of additional fields/questionnaire should be visible for the user. In order to accomplish this, we have 2 objects that serve to store the configuration of the questionnaire and its values, **Audit and Assurance Questions** and **Audit and Assurance Questions Template** and also the object **Audit and Assurance Section** to indicate in which section we will display them.

Per each record on the Audit and Assurance Questions Template object we define the specific product where this question apply, the object type (Opportunity, Engagement), the order, type of question (text, picklist, multi-picklist, lookup), etc.

Once an opportunity/engagement is saved with a product found in the Audit and Assurance Questions Template records, all those are copied into records of object type Audit and Assurance Questions. These questions are then displayed in the page layout, in the A&A Questions tab.

On the questions objects, there is a flag that indicates if the field is mandatory for

**User Stories**: From US-5095 to US-5114 with the US-5103 and US-5113 canceled

**Triggers:** pressing the *Qualify Account* button for qualification; manually updating the record type for unqualification

**Metadata**

As queues can’t be created for Account, the public group information was passed to the approval processes via flows. The qualification process was split into two separate approval processes, to be able to pass in two public groups in different steps.



Figure 4. Account Technical Flow

|  |  |
| --- | --- |
| Type | Name |
| Objects and Fields | Account (fields: mandatory fields for account qualification US-4442; the data quality checklist US-4445; DEAL\_QualificationApprovalStatus\_\_c; DEAL\_WasQualified\_\_c) |
| Record Type | Account.DEAL\_QualifiedAccount |
| Record Type | Account.DEAL\_UnqualifiedAccount |
| Record Type | Account.DEAL\_Global\_Ultimate\_Parent\_Qualified |
| Record Type | Account.DEAL\_GlobalUltimateParentUnqualified |
| Quick Action | Account.DEAL\_QualifyAccount |
| Flow | DEAL\_Qualified\_Account\_flow |
| Flow | DEAL\_SubmitAccountConflictCheck |
| Process Builder | DEAL\_AccountQualificationApproval |
| Approval Process | DEAL\_AccountQualificationDataQuality |
| Approval Process | DEAL\_AccountQualificationConflictLCSP |
| Approval Process | DEAL\_GUPQualificationConflictLCSP |
| Apex Trigger | DEAL\_AccountTrigger |
| Apex Class | DEAL\_AccountTriggerHandler (methods: checkchangeRecordTypeToUnqualified, changeRecordTypeToUnqualified, dataQualityChecklistStatus) |
| Public Group | DEAL\_DataQuality |
| Public Group | DEAL\_ConflictsTeam |