SF Admin Basics Challenge

What you need

1. Trailhead playground

Prerequisites | Data Setup:

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

3 : Create a new user
name -“Chris Evans”
profile: “Custom:Standard platform user - Sales Manager”
License: Salesforce Platform

4 : Create a new user
name -“Natasha Romanoff”
profile: “Custom:Standard platform user - Sales Operations”
License: Salesforce Platform

SF Admin Basics Challenge

Prerequisites | Data Setup:

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)

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)

SF Admin Basics Challenge - Page layouts

Challenge

UC #1 : 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

UC #2 : 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

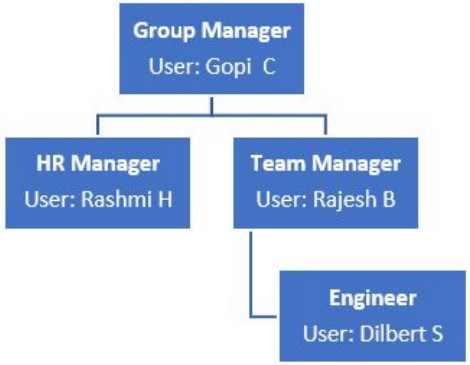
Note: **Enable login as option policy to proxy user and take screenshots to upload in MS forms link**

SF Admin Basics Challenge (Permission Sets, OWD, Sharing Rules & Role Hierarchy)

Challenge

Tip:
If you are running out of licenses for role hierarchy data setup. Free up licenses by inactivating existing users

UC #3 : Create a role hierarchy as below



UC #4 :

Clone “Standard platform User” profile and give a name **“Custom:Team Manager”**
Clone “Standard platform User” profile and give a name **“Custom:HR Manager”**
Clone “Standard platform User” profile and give a name **“Custom:Engineer”**
Clone “Standard User” profile and give a name **“Custom:Group Manager”**

SF Admin Basics Challenge (Permission Sets, OWD, Sharing Rules & Role Hierarchy)

Challenge

UC #5:
Create 4 new users

name -“Gopi C”
profile: “Custom:Group Manager”
Role: Group Manager
License: Salesforce

name -“Rashmi H”
profile: “Custom:HR Manager”
Role: HR Manager
License: Salesforce Platform

name -“Rajesh B”
profile: “Custom:Team Manager”
Role: Team Manager
License: Salesforce Platform

name -“Dilbert S”
profile: “Custom:Engineer”
Role: Engineer
License: Salesforce Platform

Sample screenshot format for submission:

☐	| Edit | Login	Evans, Chris	kdoey	ozfqkzrinwqepvdzcb@tbbyt.net	Mission Planner	✓	Custom:Standard platform user - Sales Manager
☐	| Edit | Login	G, Gowtham	jdoe	reader.vm@gmail.com.admin	Mission Consultant	✓	Custom: Support Profile
☐	| Edit | Login	J, Tejaswini	tj	tt@avengers.com.invalid	Mission Ops Team	✓	Custom:Salesforce Platform
☐	| Edit | Login	Man, Iron	iman	ironman@avengers.com.invalid	Mission Strategist	✓	Custom:Salesforce Platform

SF Admin Basics Challenge (Permission Sets, OWD, Sharing Rules & Role Hierarchy)

Challenge

UC #6 : Create a custom object named “Appraisal Form” with the below fields

- Appraisal Start Date (data type:Date: Mandatory - Yes)
- Appraisal Notes(data type: Textarea. Mandatory - Yes)
- Evaluation Type (daya type: Picklist, Mandatory - Yes)
  Values are : Quarterly, Half-yearly, Annual

UC #7: Login as each user and create **minimum two records in “Appraisal Form”** object

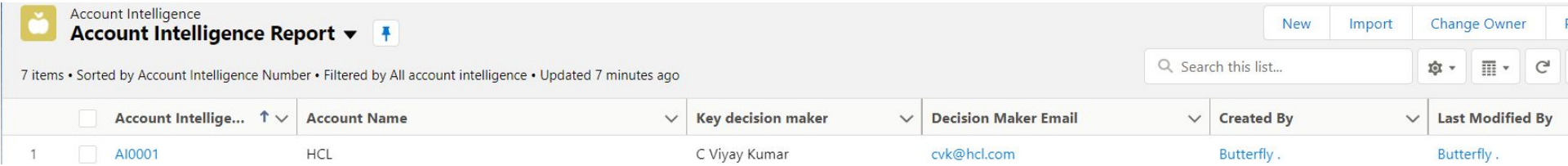
UC #8: Create a list view named “**Appraisal Form Summary View**”and show the following fields. Make it available for all users

- Appraisal Start Date
- Evaluation Type
- Created By
- Last Modified By

Filter to be used:

- Set Filter by owner as “All Appraisal Form”

<u>Sample screenshot format for submission:</u>



SF Admin Basics Challenge (Permission Sets, OWD, Sharing Rules & Role Hierarchy)

UC #09 : Ensure OWD data security is set appropriately so that only record owners and users higher in the role hierarchy can see the record

UC #10: Enable changes in the system so that records created by **"Dilbert S"** is **visible but read only** for **"Rashmi H"**

UC #11: Enable changes in the system so that records created by **"Rajesh B"** is **visible but read only** for **"Rashmi H"**

UC #12: Enable changes in the system so that **"Rajesh B"** can **see all records** in appraisal form object

UC #13: Share at least one of the records created by **"Gopi C"** to **"Dilbert S" .** Ensure record is shown to Dilbert in read only mode

Upload your final results here:- Will be closed by Dec 26, 2021 6 P.M IST

<TBS>

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
3. Ensure you have completed all the changes and upload list view screen shot with data. Empty listview will not be considered for evaluation and will be marked as incomplete in the final report

If any one of the team members did not upload code challenge result , entire team will be marked as "Incomplete"