

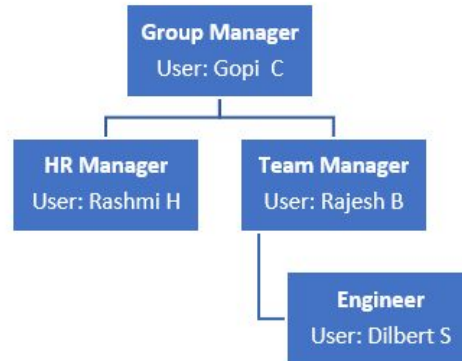
SF Admin Basics Challenge (Approval process, validation rules, process builder, chatter)

What you need

1. Trailhead playground

Pre-Challenge data setup:

#1 : Create a role hierarchy as below



#2 :

- 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”**

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Pre-Challenge data setup:

#3:

Create 4 new users

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

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

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

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

<input type="checkbox"/>	Edit Login	Evans, Chris	kdoey	ozfqkzrinwqepvdzcb@tbyyt.net	Mission Planner	<input checked="" type="checkbox"/>	Custom:Standard platform user - Sales Manager
<input type="checkbox"/>	Edit Login	G. Gowtham	jdoe	reader.vm@gmail.com.admin	Mission Consultant	<input checked="" type="checkbox"/>	Custom: Support Profile
<input type="checkbox"/>	Edit Login	J. Tejaswini	tj	tt@avengers.com.invalid	Mission Ops Team	<input checked="" type="checkbox"/>	Custom:Salesforce Platform
<input type="checkbox"/>	Edit Login	Man, Iron	iman	ironman@avengers.com.invalid	Mission Strategist	<input checked="" type="checkbox"/>	Custom:Salesforce Platform

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Pre-Challenge data setup:

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

- Appraisal Start Date (data type:Date: Mandatory - Yes)
- c(data type: Textarea. Mandatory - No)
- Evaluation Type (daya type: Picklist, Mandatory - No)
Values are : Quarterly, Half-yearly, Annual
- Appraisal Status(daya type: Picklist, Mandatory - Yes)
Values are : In Draft, Saved, Completed (make sure “In Draft” is selected by default)
- Review Status(daya type: Picklist, **READONLY**, Mandatory - No)
Values are : Sent for review, Review Completed

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

#06 : Create few sample records on “Contract” object

Contracts								New
Recently Viewed ▾								
3 items • Updated a few seconds ago								Search this list...
	Contract Number	Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)		
1	<input type="checkbox"/> 00000102	Dickenson plc	In Approval Process	11/1/2021	10/31/2022	12		
2	<input type="checkbox"/> 00000101	Dickenson plc	Draft	9/1/2021	2/28/2023	18		
3	<input type="checkbox"/> 00000100	3M - APAC	Draft	9/16/2021	1/15/2023	16		

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Challenge

UC #1: Enable changes in the system so that “**Rashmi H**” can **see and edit all records** in appraisal form object

UC #2 : Create a validation rule on “Appraisal Form” object to throw an error message when

- User chooses “appraisal start date” less than current year date
- **Message:** “Cannot create appraisal document for past year !!!!”

Hint: Use YEAR() option to extract year from appraisal start date

UC #3: Create a validation rule on “Appraisal Form” object to throw an error message when

- User leaves “appraisal notes” or “Evaluation Type” empty less than current year
- **Message:** “Cannot leave the fields with empty values!!!!”

UC #4: Create an **approval process** on “**Appraisal Form**” object and activate

- Approve process should trigger when “**Appraisal notes**” and “**Evaluation Type**” are **not empty** and **Appraisal Status** is **completed**
- When a record is submitted for approval
 - a task should be created for “**Rahmi H**” and “**Gopi C**”
 - Update “**Review Status**” field to “**Sent for review**”
- Configure “**Rashmi H**” as level one / step 1 approver
- Configure “**Gopi C**” as level two / step 2 approver
- Upon all approvals,
 - Update “**Review Status**” field to “**Review Completed**”

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Challenge

UC #5: Create a **process builder** and trigger approval process that was created in step 4 so that **approval process is auto triggered** when **Appraisal Status** is marked as **completed** by the user

UC #6: Login as “**Dilbert S**” can **submit** appraisal form for current year

UC #7 : Login as “**Rajesh B**” can **submit** appraisal form for current year

UC #8: Enable **Field tracking for “Appraisal form”** object in chatter settings for the below fields

- Appraisal Notes
- Appraisal Status
- Review Status

SF Admin Basics Challenge (Flow)

Challenge

UC #9: Provide an option to the user on Account page to **clone an existing contract**

- Create a screenflow to list contracts tied to an account and a screen to get user input (**new contract name , contract Start date & Contract Term**)
- Create a auto launch flow(sub flow) and have new cloned contract created

UC #10 : Create a new quick action on Account object named “**Clone Contract**”

- Launch the flow created above when the user selects “**Clone Contract**” quick action

Upload your final results here:- Will be closed by Jan 15, 2021 6 P.M IST

<https://forms.office.com/r/fv7eyT0kBj>

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