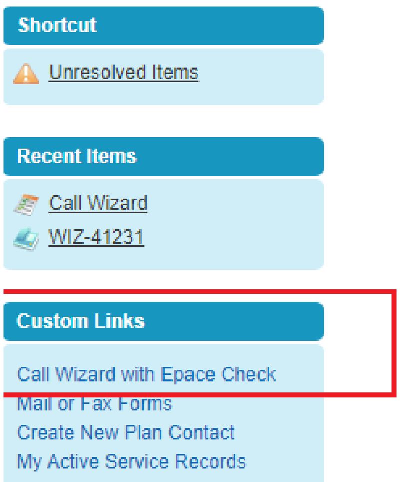
SF Sandbox set up for dev candidate.

Log into sandbox.

We use mfa for admins. So you'll download the salesforce authenticator app.

Create a contact and patient from the call wizard with epaces vs page.



Exercises

1. Create caller/patient records from call wizard.
2. Create new status for patient status field, update this field to "patient passed away" when the discontinued reason of the sr is set to "patient passed away"

"We'd like your help in creating an email alert when there is a patient who passes away. If that email can go to Ronak Jain. He will then write a condolence card to the family of the patient, and ideally he'd log that in Salesforce so we know who has received a card.

3. Screen Flow – using a button, create a screen flow to update the service record status.
    a. Create a custom field and store the input from the screen.
4. Create a task from the service account that saves a task as case activity history for the service record and the contact. (patient or caregiver)
5. Lighting Exercise – push notification for alerts for when a service record has a status of "case on hold" and case on hold reason is "compliance concern"

APEX EXERCISE

Overview:

Create a Case Manager "wizard" on the account page layout that allows the user to create a new contact that belongs to the active health plan on the Account, and adds it to the Case Manager Field on the Account

Reference and Requirement Details:

Contact record type: Insurance Plan Contact

Account Fields:

- Health Plan – *Current Health Plan on Case*
- Case Manager – Contact Lookup Insurance Plan Contacts that belong to Health Plan account

Wizard Layout:

- Last name and phone field required
- Fields visible on the wizard for:
    - First name
    - Last Name
    - Email
    - Phone
    - Phone Extension
    - Mobile
    - Fax
    - Account name

Function and notes:

- Once the wizard is run the Insurance Plan Contact is created, the Case Manager field on the Account fills with the newly created contact. Page refreshed to show case manager field populated
- Newly created Insurance Plan Contact is associated to the Health Plan Account on the Service Record (Account record type)
- Duplicates for phone numbers allowed for this contact record type as long as the contact is in the same account
- If Care Manager field is already populated, replace Case Manager contact with newly created Insurance plan contact

Outline of Work:

1. Create a Custom Action Called "New Case Manager" on Account and add it to Service Record layout
    a. Include fields requested in action layout
2. Make necessary adjustments to existing automations/Apex code to meet requirements or add in new automations/Apex code
3. Add 2 plan contact from the Service Record Account layout to ensure wizard function works
4. Create Test Class with at least 90%

APEX TRIGGER EXERCISE

Overview:

Verify mailing address, phone number, and email information through the use of a managed package method (documentation link below). On any creation of contact or update of a contact that has either address, phone number, or email populated, call the respective methods to verify the information.

Managed Package Documentation on Methods:
http://wiki.melissadata.com/index.php?title=Salesforce%3AAPEX_Triggers

1. Create a trigger that calls the respective methods needed
2. Create test class