Session 7 Homework

Trailhead moduls:

- Build a Discount Approval Process: https://trailhead.salesforce.com/content/learn/projects/build-a-discount-approval-process
- Flow Builder Basics: https://trailhead.salesforce.com/content/learn/modules/flow-basics
- Build a Simple Flow: https://trailhead.salesforce.com/content/learn/projects/build-a-simple-flow
- Flow Builder Logic: https://trailhead.salesforce.com/content/learn/modules/flow-build-logic
- Build Flows with Flow Builder: https://trailhead.salesforce.com/content/learn/trails/build-flows-with-flow-builder

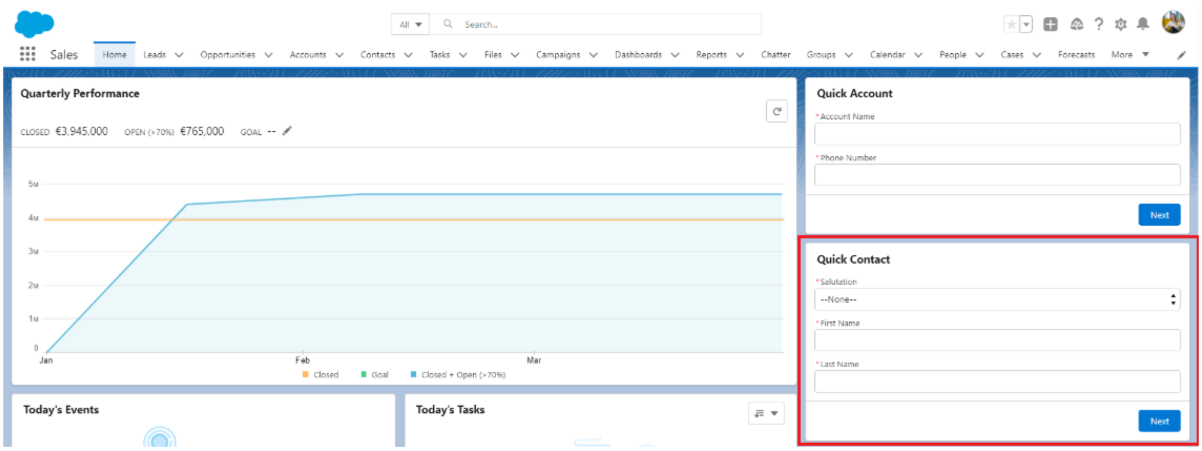
Useful info about Automation Tools: https://www.salesforceben.com/workflow-rules-vs-process-builder-feat-apex/

Additional Exercises (after completing the above moduls)

Use a new playgorund for these exercises!

New Contact Screen Flow

Build a flow to streamline adding a new contact. When it runs, it should collect input about the required fields (`Salutation`, `First Name`, `Last Name`). Add the flow to the Home Page and try it out!



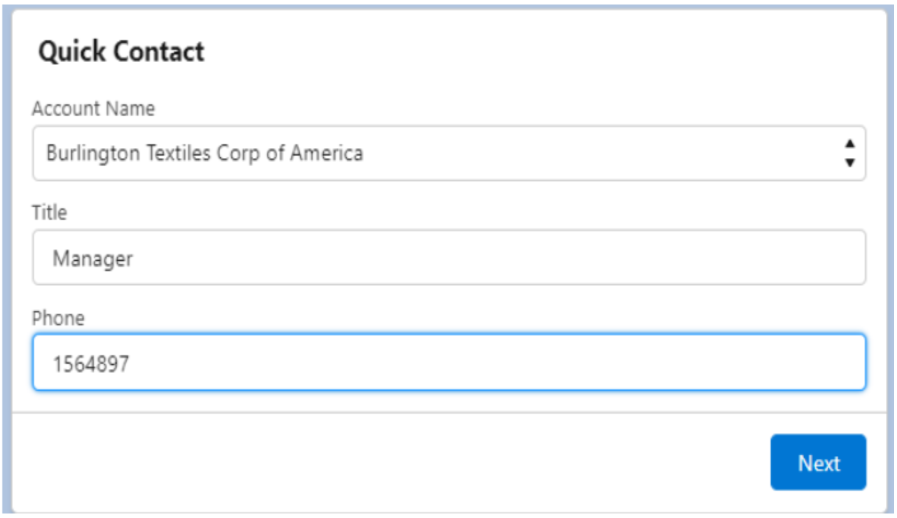
Hint: in case you got lost check out again the Trailhead lesson for creating a flow for Quick Account.

Update New Contact

Please note that the *__New Contact Screen Flow__* *is a prerequisite of this exercise.*

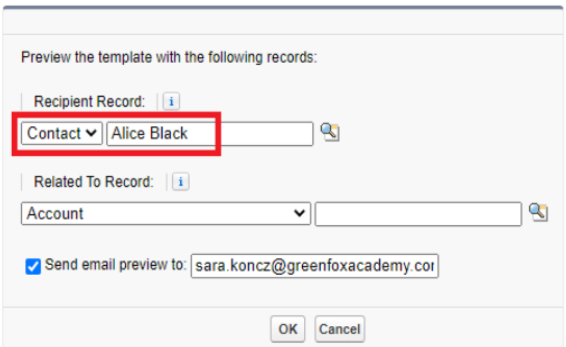
Your users really appreciated that you made it so quick and easy for them to create a new contact. However, most of the time they don't only want to fill the required fields but also select to which `Account` the contact belongs to and provide the new contacts `Title` and `Phone` number.

Extend your flow with a second screen, so the users can pick the account easily and type in the title and phone number.



Birthday Email Template

Create a Classic Email Template that your org could use for automatizing greeting contacts on their birthday. It should use the first name of the contact in the address of the letter and the first name of the contact's owner in the goodbye part. When sending a test it should work as you can see on the below image:



Case Verification

Cases help to see what issues affect the sales process. Handling them quickly is very important in order to keep customers happy.

You received the following feature request regarding the cases:

The sales reps would like to make sure that certain issues get verified by an expert within the organization. When they have collected all the necessary information they would like to be able to mark it on the case's detail page that it is `Ready for Verification`. When a case is ready for verification and not verified they should be able to send it for approval to whomever user they choose within the org.

The recipient of the approval request should receive an e-mail, stating the most important details regarding the case. In the subject it should be stated under which account the case was raised. In the e-mail's body the recipient should be greeted by his/her first name and kindly requested to review the case. Provide information in the e-mail regarding the type and subject of the case as well.

Besides the e-mail users would also like to see the Items to Approve on their home page.

When the approver accepts the request, on the case's detail page it should be shown as `Verified`. Also at the same time the owner of the case should receive an e-mail that the case was verified. Again in the subject state under which account the case was verified. In the body call the recipient by his/her first name and inform that the case was verified, he/she can proceed.

When the approver rejects the request, on the case's detail page it should be shown as `Clarification Needed`. Also at the same time a task should be automatically created for the owner of the case with the subject `Clarify Case`. The case owner should have 5 days to complete this high priority task which is related to the case.

Once you are ready with the feature try it out and test it! You are ready when:

- you create a case you can check the `Ready for verification` field
- you can send it for approval only when the `Ready for verification` field is checked and the `Verified` picklist's value is not `Verified`
- when assigning yourself as the approver you receive an e-mail regarding the verification request
- you also receive a notification and you can see the item to approve on your home page
- when you (as the approver) approve it you receive an e-mail about it (as the case's owner) and also you see the change on the case's detail page
- when you reject it (as the approver) you (as the case's owner) get a new task assigned to you to clarify it and also you see the change on the case's detail page that it needs clarification

Hint: it is possible that you can't see the `Submit for Approval` button on a record's detail page. This case on the object's page layout you must override the predefined actions and make sure that `Submit for Approval` is included.

In case you can't find that setting, take a look at this screenshot.