Session 2 Homework

Trailhead moduls:

- https://trailhead.salesforce.com/content/learn/modules/lex_customization
- https://trailhead.salesforce.com/content/learn/projects/prepare-your-salesforce-org-for-users
- https://trailhead.salesforce.com/content/learn/modules/lex_implementation_user_setup_mgmt

Good to know – Read and learn it!

- Classic / Lightning: https://help.salesforce.com/s/articleView?id=sf.lex_aloha_comparison.htm&type=5
- Set Up and Maintain Your Salesforce Organization: https://help.salesforce.com/s/articleView?id=sf.setup_overview.htm&type=5

Additional Exercises (after completing the above moduls and if you are in the mood ☺)

Idea Inventory

You will create a Lightning App for your organization, in which people can register their ideas for new products/campaigns etc.

1. Create the Idea custom object.
    - Label: `Idea`
    - Plural Label: `Ideas`
    - Record Name: `Idea Name`
    - Data Type: `Text`
2. Also create a custom tab for the object and choose the `Treasure chest` from the predefined tabs.
3. Create a new lightning app called `Idea Inventory`.
    - You can upload an image and choose a color that matches to the topic.
    - You can leave the defaults as-is, and progress to the Navigation Items step.
    - From available items select the following: `Ideas`, `Reports` (this we will use later).
    - Make it available for `System Administrator`.
4. Launch the Idea Inventory app from the *App Launcher* and take a look.
5. Add custom fields to your `Idea` custom object.
    - Description Field
        - Field Data Type: `Text Area (Long)`
        - Field Label: `Idea Description`
        - Length: `32,768`
        - Visible Lines: `5`
        - Field Name: `Idea_Description`
        - Help Text: `Please enter a detailed description of your idea.`
    - Category Field
        - Field Data Type: `Picklist`
        - Field Label: `Idea Category`

        - Field Name: `Idea_Category`
        - Picklist Values: `New Product`, `Campaign`, `Target Group`, `Hype`, `Other`
        - Deselect *Restrict picklist to the values defined in the value set*.
    - Status Field
        - Field Data Type: `Picklist`
        - Field Label: `Status`
        - Field Name: `Status`
        - Picklist Values: `New`, `Under Consideration`, `In Progress`, `Implemented`
        - Select *Use first value as default value*.
    - Date Field
        - Field Data Type: `Date`
        - Field Label: `Date of Realization`
        - Leave the defaults for the remaining fields.
6. Fill up your app with at least 5 idea records.

Compact Ideas

Note: the **Idea Inventory** is a prerequisite of this exercise.

Boost the user experience in your Idea Inventory app by highlighting the following fields: `Idea Name`, `Idea Category`, `Status`.

Hint: use the *Compact layouts*.

Create Customized List View

Your colleague, Daniel is a sales manager and works very closely with United Oil & Gas Corp. Since he has a very good relationship with the colleagues who work there, he by no means wants to forget to greet them on their birthday with a personal phone call or e-mail. Create a list view that show all the relevant records with only relevant data for making the call.

- Launch the Community app and select the *Contacts* tab, all users can see this list view
- Create a new *List View* called `United Oil Contacts`
- Set a filter so it only shows contacts, where the *Account Name* is `United Oil & Gas Corp.`
- The list should only include the following columns in the given order: `Name`, `Title`, `Department`, `Languages`, `Phone`, `Email`, `Birthdate`

Let Me Google That For You

A plenty of new colleagues joined the Sales department and they are less familiar with the company's accounts. They definitely have to google them in order to learn more about all the partners they are going to work with.

Create a custom button for them, so they can do it right from the account's page. Label is as `Account Info` and add this custom button to the *Account (Sales) Layout*. Temporarily set this layout to your *System Administrator* profile as well, so you can check out how it works.