

Shield Transactional Security

Fins Cabin Demo self walk through

An unmanaged package has been created so that you can walk through the same transactional security demo as was presented in The Fins Cabin Event

Fins Cabin 8 - Shield Event Monitoring you don't know what you are missing

https://trailhead.salesforce.com/trailblazer-community/groups/0F94S000000GwXkSAK?tab=discussion&sort=LAST_MODIFIED_DATE_DESC

The unmanaged package referenced in this documentation is for educational purposes only and should NOT be installed in a production environment or be treated as anything other than examples of what can be done with transactional security.

It is recommended that a new Developer org is signed up for in order to install the unmanaged package for this demo. Alternatively you could use a trailhead org but I would recommend ensuring it is a fresh new environment. Note if there are conflicts between this unmanaged package and the environment you attempt to install it in the install will fail. For example if the field VIP__C already where to exist on the contact object this would cause the package to fail.

Signing up for a developer org if you have not done so before is simple. Navigate to <https://developer.salesforce.com/signup>

Address and search bar (<https://developer.salesforce.com/signup>)

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First Name* Your first name Last Name* Your last name

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Company* Company Name

Country/Region* Select Country/Region

Postal Code* Your postal code

Username* jane@company.sandbox

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Salesforce Agreement](#) and to the storage and processing of your

Fill in the form. Please ensure you read the notes about user name. All Salesforce usernames are unique globally and you should never use a username that you might need to be available for production Salesforce environments as once used that username would be unavailable.



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First Name*	Last Name*
<input type="text" value="FirstName"/>	<input type="text" value="LastName"/>

Email*

Role*

Company*

Country/Region*

Postal Code*

Username*

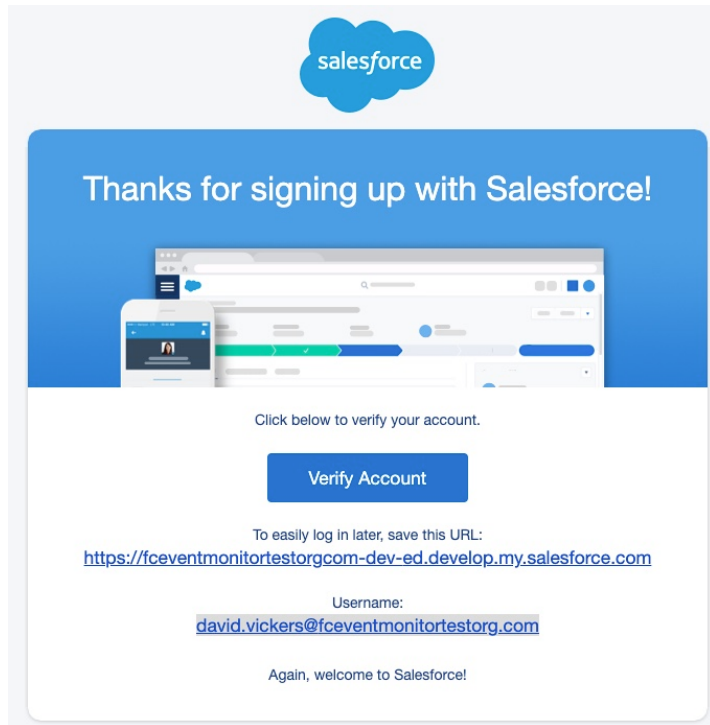
Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

Enter a unique username. Your username must be in the form of an email address, but does not have to be a real email address. We suggest "name@yourcompany." It must be unique and not associated with another Salesforce login credential.

By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Main Services Agreement](#) and to the storing and processing of your personal data by Salesforce as described in the [Privacy Statement](#), including use for marketing purposes.

Shortly after signing you will receive an email from **developer@salesforce.com** <developer@salesforce.com>
Email title :- Welcome to Salesforce: Verify your account

As always if you don't see this email within 20 min or so (often within a min or two) check your spam folder!
Click on the Verify Account button in the email



FinsCabinEventMonitoringDemo

Version 1.2

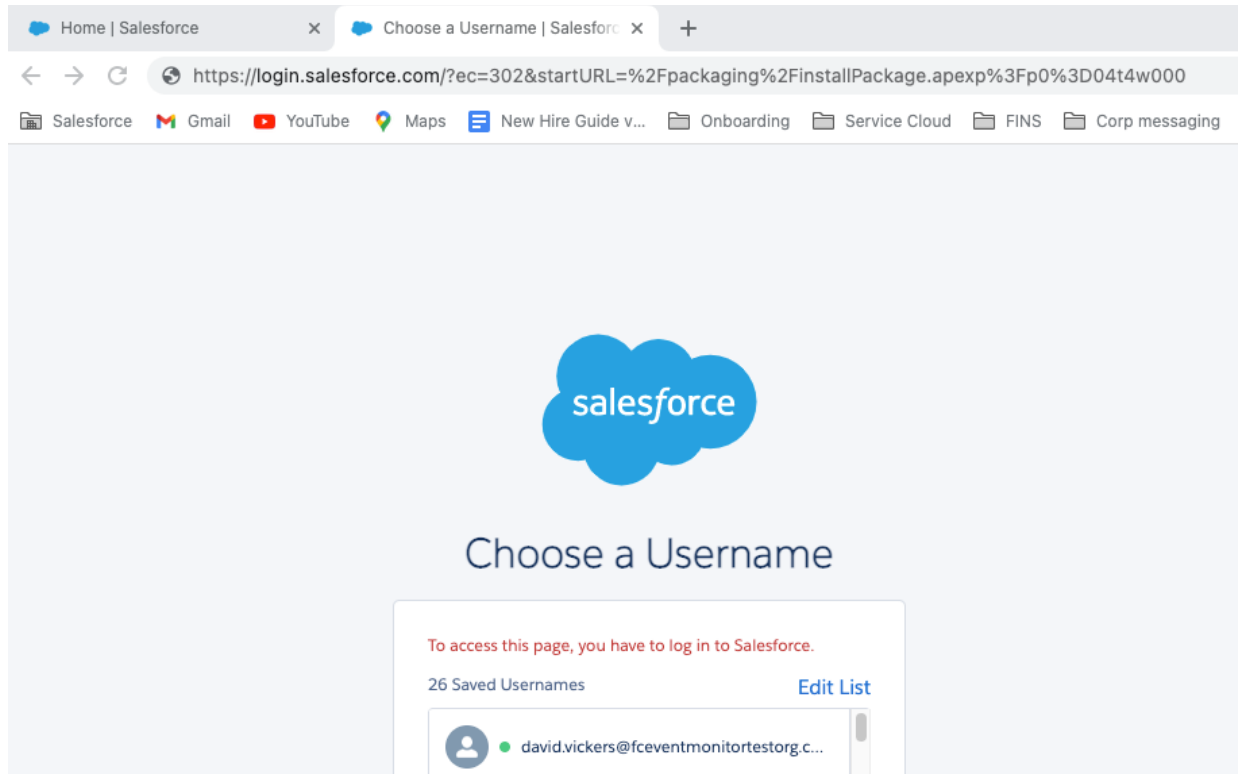
Use this URL to install the package into any organization:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4w000000GHEn>

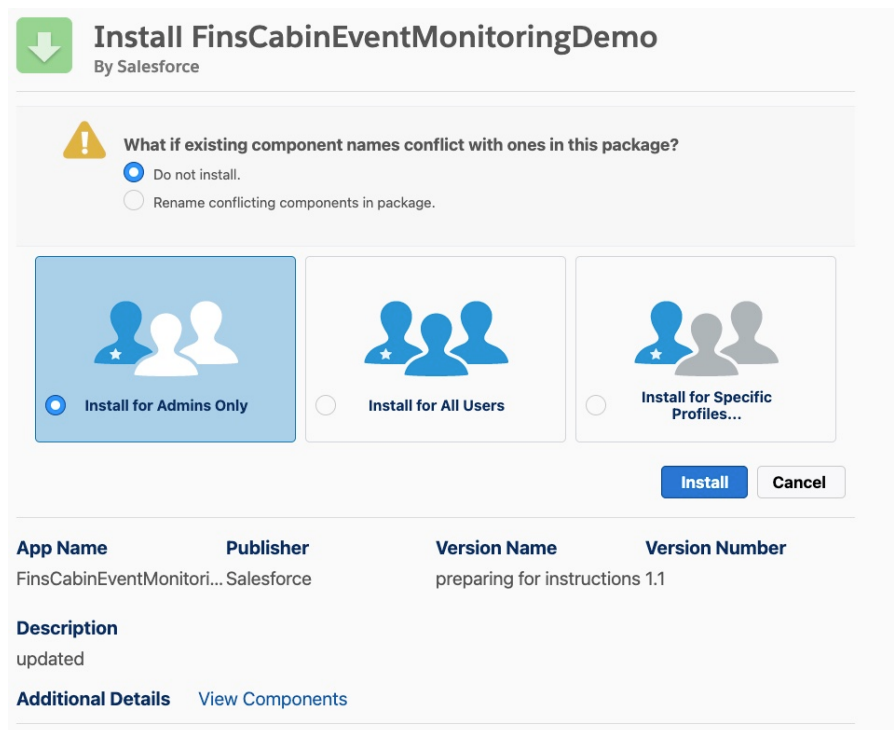
Note: If you are installing into a sandbox organization you must replace the initial portion of the URL with

<http://test.salesforce.com>

Once you click the link you will be prompted to select an org. Either log in to the dev org you created or if you are already logged into that org just select that org see below.



Install for admins only



Allow the install process to finish

Search the setup menu for “Packaging” and select installed packages and you should see the FindCabinEventMonitoringDemo package installed

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'pack' entered. Under the 'Apps' section, 'Packaging' is selected, showing 'Installed Packages', 'Package Manager', and 'Package Usage'. The main content area is titled 'Installed Packages' and includes a table with the following data:

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	12/15/2022, 10:52 AM	✓	0	0	0	Not Passed
Uninstall	FindCabinEventMonitoringDemo	Salesforce	1.0		12/16/2022, 1:18 PM	✓	0	0	0	Not Applicable

Click on it if you want to see the installed components

The screenshot shows the 'Package Details' for 'FindCabinEventMonitoringDemo'. The page includes a 'Package Details' section with the following information:

- Package Name: FindCabinEventMonitoringDemo
- Language: English
- Version Name: preparing for instructions
- Publisher: Salesforce
- Description: This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...
- Installed By: David Vickers, 12/18/2022, 6:57 PM

Below this, there is a table of 'Metadata Components Included in Package' with the following data:

Action	Component Name	Parent Object	Type
	CabinTransactionalSec2		Apex Class
	CreateDataMock		Apex Class
	Demopolicy		Transaction Security Policy
	PolicyCondition_OmkayMIRTuRmOQInTvi		Flow Definition
	CreateDataTest		Apex Class
	Demopolicy2		Transaction Security Policy
	FindCabinEventMonitoringData		Static Resource
	my.Contacts & Accounts Report		Report
	FindCabinData		Apex Class
	TestTransactionalSecurity		Apex Class
	VIP	Contact	Custom Field
	Event Monitoring Demo Reports		Report Folder

Now the package is installed, we have some post instal steps to finish. In set up got to the object manager → then select the contact object.

From Page layouts edit the contact layout.

Then add the VIP field to the contacts layout and save.

Page Layouts
4 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Contact (Marketing) Layout	David Vickers, 12/7/2022, 1:53 PM	David Vickers, 12/16/2022, 1:17 PM
Contact (Sales) Layout	David Vickers, 12/7/2022, 1:53 PM	David Vickers, 12/16/2022, 1:17 PM
Contact (Support) Layout	David Vickers, 12/7/2022, 1:53 PM	David Vickers, 12/16/2022, 1:17 PM
Contact Layout	David Vickers, 12/7/2022, 1:53 PM	David Vickers, 12/16/2022, 1:22 PM

Contact Detail

Fields: Name, Birthdate, Department, Contact Owner, Assistant, Account Name, Clean Status, Title, Department, Birthdate, Reports To, Lead Source, Phone, Home Phone, Mobile, Other Phone, Fax, Email, Assistant, Aest. Phone.

Setup Cog Icon (Top Right)

click on the setup cog (top right of your page) and select “Developer Console”

Setup
Setup for current app

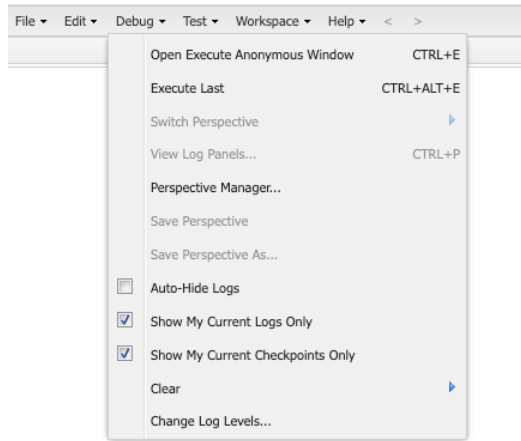
Service Setup

Developer Console

Edit Page

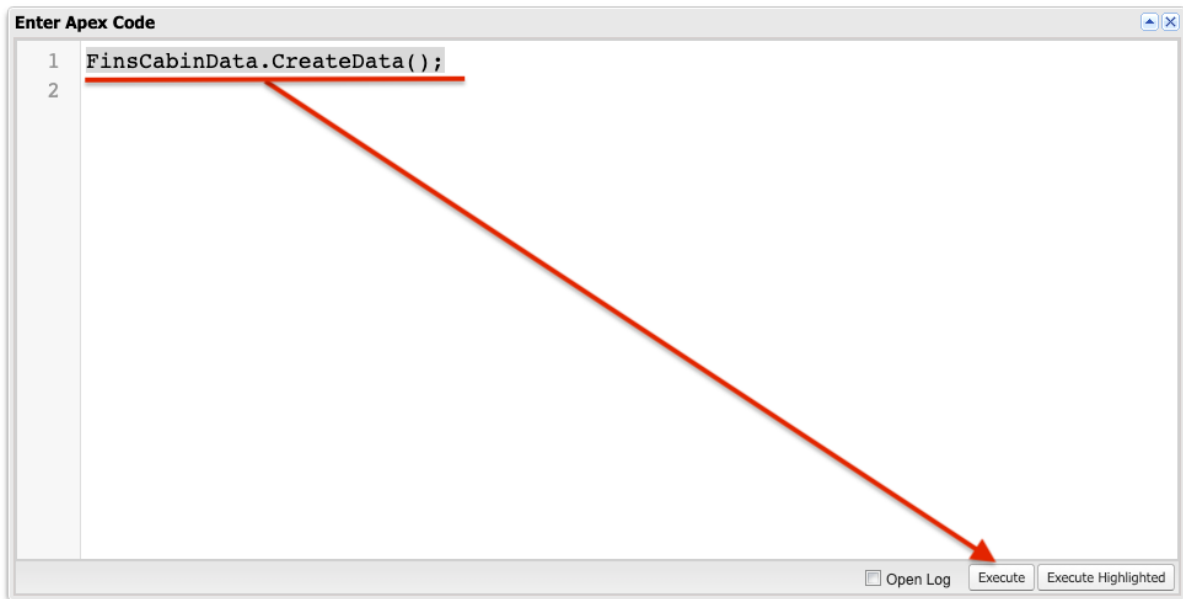
Edit Object

In the developer console menu select Debug then the Open Execute Anonymous window. (or CTRL+E)



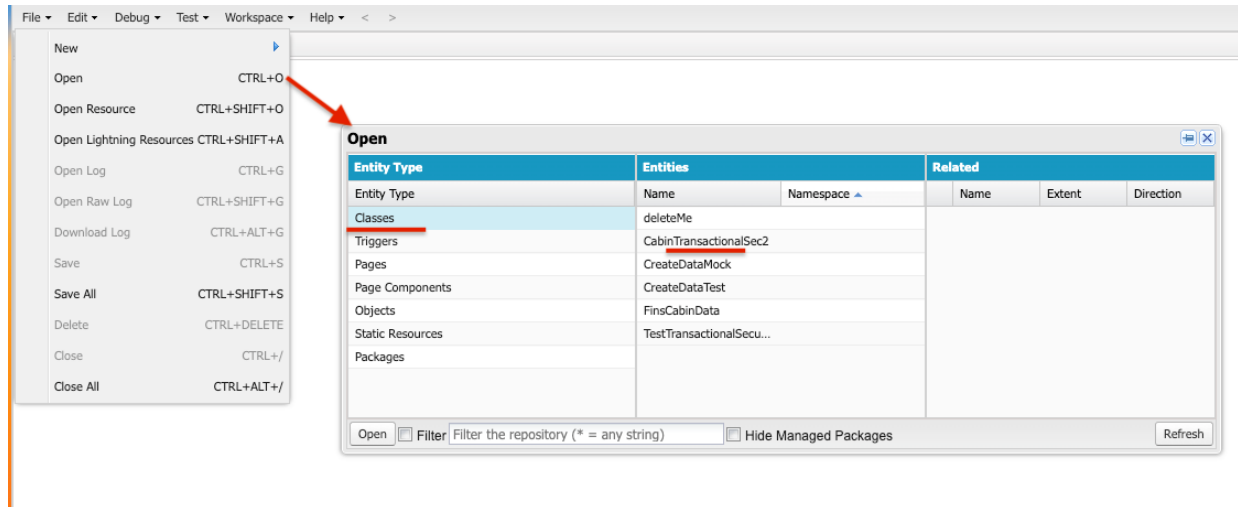
Enter the following line of code and execute. This will create the data for the demo

```
FinsCabinData.CreateData();
```



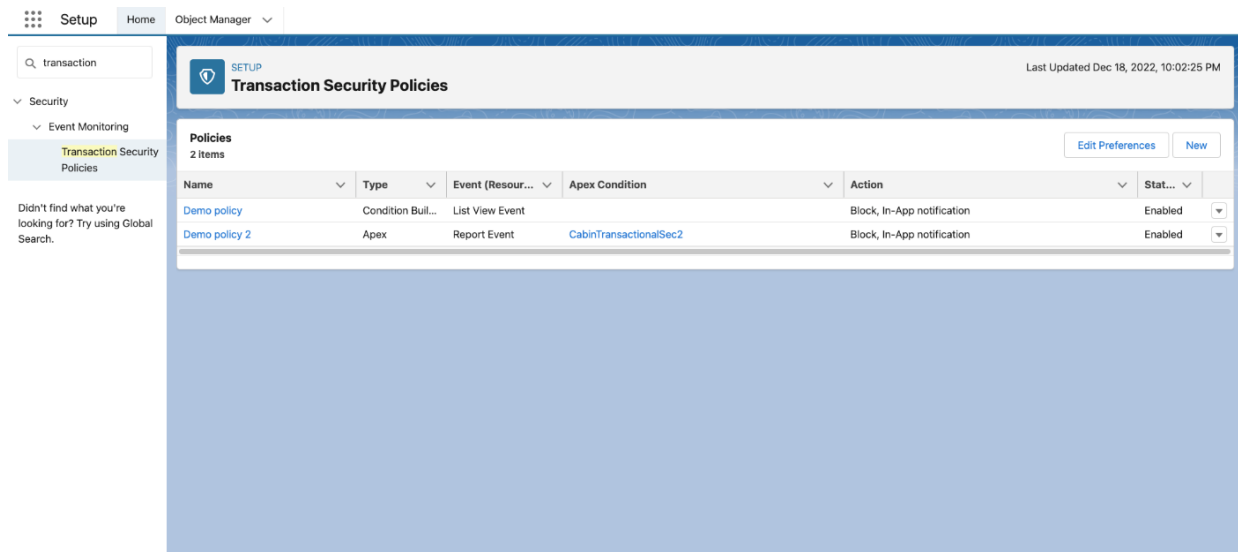
While in the Developer Console you could take a look at the apex class written to support the apex transactional security part of the demo. go to File → open → and select classes . Click on CabingTransactionalSec2 to open the code.

This Code also includes a link the Instructions for the Comet D listener that was used in the Demo and a sample Json file that is emitted when a report event happens.



Now go back to the main Salesforce environment and go back to setup. in the setup search type Transaction and immediately you should see the transactional security policies menu item click on it You may see the sample policies immediately or you may have to click the enable Transactional security policies button now showing on your screen.

Once enabled you should see the following



NOTE both the sample policies are enabled click on the ▼ at the end of the row to disable the policy or click on the name to edit the policy

Now while out of set up go to the account object and try the list view all accounts, it should fail because the over 45 row policy is violate.

Go to reports → All Folders and then select the Event Monitoring Demo reports folder and then finally the one report it contains.

Report: Contacts & Accounts

my Contacts & Accounts Report

Running this report should fail with a custom message

“No VIPs are allowed in reports. Please add a filter of VIP = False to the report to see all other contacts. If you require access to VIP contacts, please see your manager or contact your Salesforce Admin.”

Now search for Fred Cooper in contacts and uncheck his VIP status and save your change and the report should run without issue.

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	12/7/2022, 1:53 PM	Automated Process	12/7/2022, 1:53 PM
Created by Me	Einstein Bot Reports Summer '22	Automated Process	12/7/2022, 1:53 PM	Automated Process	12/7/2022, 1:53 PM
Private Reports	Einstein Bot Reports Winter '23	Automated Process	12/7/2022, 1:53 PM	Automated Process	12/7/2022, 1:53 PM
Public Reports	Event Monitoring Demo Reports	David Vickers	12/18/2022, 6:57 PM	David Vickers	12/18/2022, 6:57 PM

For Further information check out the fins cabin

Fins Cabin 8 - Shield Event Monitoring you don't know what you are missing video

[https://salesforce.vidyard.com/watch/TGfe2FhCThsbUJS68haeG9?](https://salesforce.vidyard.com/watch/TGfe2FhCThsbUJS68haeG9?&_gl=1*4z3lzy*_ga*MTE0Mzc4MDY3OC4xNjcNDE3OTUw*_ga_H6M98GGB18*MTY3MTQ1OTYyOC43LjEuMTY3MTQ1OTYzMy4wLjAuMA..&_ga=2.102501256.862129761.1671417950-1143780678.1671417950)

[&_gl=1*4z3lzy*_ga*MTE0Mzc4MDY3OC4xNjcNDE3OTUw*_ga_H6M98GGB18*MTY3MTQ1OTYyOC43LjEuMTY3MTQ1OTYzMy4wLjAuMA..&_ga=2.102501256.862129761.1671417950-1143780678.1671417950](https://salesforce.vidyard.com/watch/TGfe2FhCThsbUJS68haeG9?&_gl=1*4z3lzy*_ga*MTE0Mzc4MDY3OC4xNjcNDE3OTUw*_ga_H6M98GGB18*MTY3MTQ1OTYyOC43LjEuMTY3MTQ1OTYzMy4wLjAuMA..&_ga=2.102501256.862129761.1671417950-1143780678.1671417950)