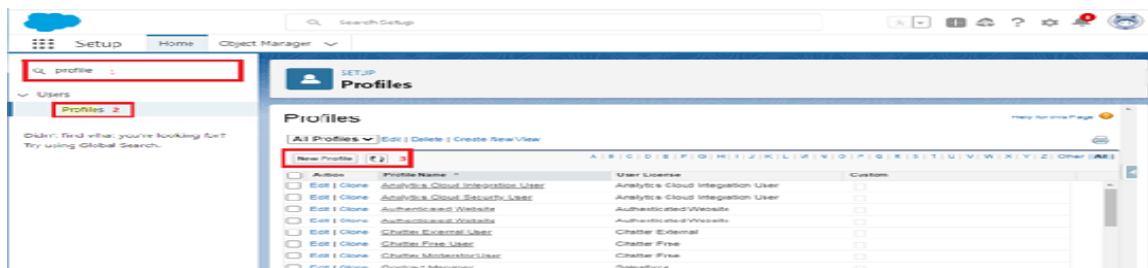


Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges

➤ Creation On Profile

- From Setup enter Profiles in the Quick Find box
- Select Profiles.
- Click new, From the list of profiles, find Standard User (profile to clone)
- For Profile Name, enter School Profile
- Click Save.
- While still on the School profile page, then click Edit.
- Scroll down to Custom Object Permissions and Give view all access permissions.



Clone Profile

[Help for this Page](#)

Enter the name of the new profile.

You must select an existing profile to clone from. = Required Information

Existing Profile:

User License:

Profile Name: 4

5

| Custom Object Permissions 7 | | | | | | |
|-----------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|
| | Basic Access | | | | Data Administration | |
| | Read | Create | Edit | Delete | View All | Modify All |
| Customers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Drivers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Parents | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

| | Basic Access | | | | Data Administration | |
|----------|-------------------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|
| | Read | Create | Edit | Delete | View All | Modify All |
| Schools | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Students | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Vehicles | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

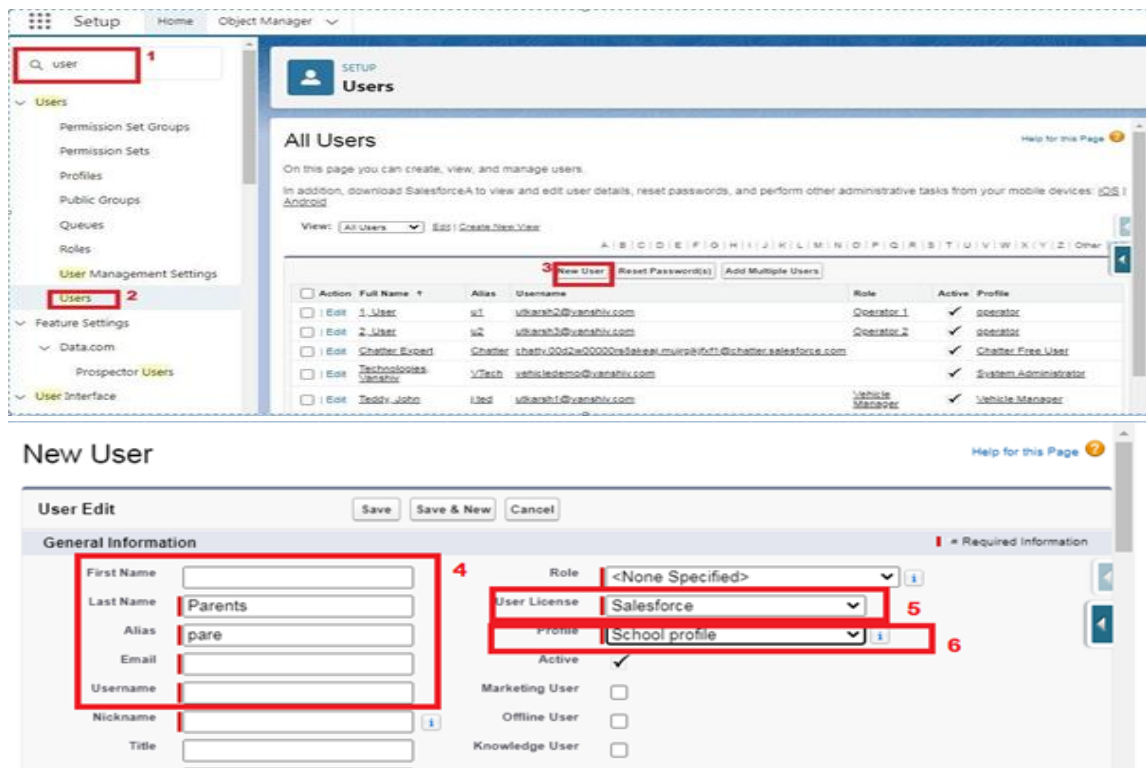
Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

➤ Creating A User

- From Setup, in the Quick Find box, enter Users.
- Select Users.
- Click New User.
- Enter the user's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- Select a User License as salesforce.
- NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find salesforce license then deactivate a user who has salesforce license or change the license type from Salesforce to any other.
- Select a profile as a School profile.

- Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
- Similarly follow the above steps and create 2 users as Teachers and principals.



Permission Sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

➤ Permission Sets 1

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as teacher permission.
4. Under the object settings give the view create and edit permissions to all 3 custom objects (By click open the object)
5. Click on manage assignment
6. Click on add assignment.

7. Click on Teacher (user), Next, Assign

Q: permis

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

SETUP Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | Edit | Delete | Create New View

New

| Action | Permission Set Label ↑ | Description | License |
|--------------------------------|------------------------|--|---|
| <input type="checkbox"/> Clone | Buyer | Allows access to the store. Lets users see p... | B2B Buyer Permission Set One Seat |
| <input type="checkbox"/> Clone | Buyer Manager | Includes all Buyer capabilities, and allows a... | B2B Buyer Manager Permission Set One Seat |
| <input type="checkbox"/> Clone | CRM User | Denotes that the user is a Sales Cloud or S... | CRM User |

n.

SETUP Permission Sets

Save Cancel

Enter permission set information

Label: teacher permission

API Name: teacher_permission

Description:

Session Activation Required: ☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose "--None--" if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License: --None--

Save Cancel

SETUP **Permission Sets**

Q, Find Settings... Clone Delete Edit Properties **Manage Assignments** 5

Permission Set Overview

Description

License

Session Activation Required ☐

Last Modified By [Vanshiv Technologies](#), 04/04/2023, 4:35 pm

API Name [teacher_permission](#)

Namespace Prefix

Created By [Vanshiv Technologies](#), 04/04/2023, 4:35 pm

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu.

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu.

Object Settings
Permissions to access objects and fields, and settings such as tab availability. 4A

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers".

Apex Class Access
Permissions to execute Apex classes.

SETUP **Permission Sets**

Available ☐ Visible ☐ 3

Object Permissions

| Permission Name | Enabled |
|-----------------|-------------------------------------|
| Read | <input checked="" type="checkbox"/> |
| Create | <input checked="" type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> |
| Delete | <input type="checkbox"/> |
| View All | <input type="checkbox"/> |
| Modify All | <input type="checkbox"/> |

4B

SETUP **Permission Sets**

Available ☐ Visible ☐ 3

Object Permissions

| Permission Name | Enabled |
|-----------------|-------------------------------------|
| Read | <input checked="" type="checkbox"/> |
| Create | <input checked="" type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> |
| Delete | <input type="checkbox"/> |
| View All | <input type="checkbox"/> |
| Modify All | <input type="checkbox"/> |

4B

Similarly, follow the above steps for the permission set 2.

➤ Permission Sets 2

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the all 3 custom objects and assign them to the Principal user.

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

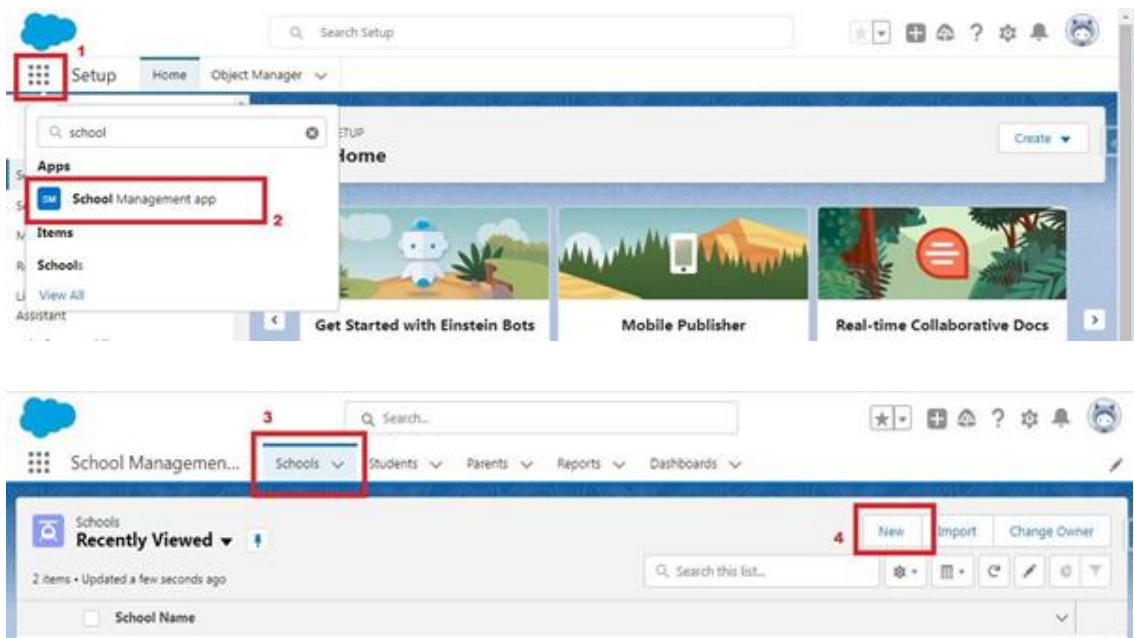
4. Joined Reports:

These types of reports let us create different views of data from multiple report types. The data in joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

There are 4 **User Adoption**

➤ Create Record (School)

1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools tab.
4. Click new button
5. Fill all School record details.
6. Click on Save Button



Information

1 School Name Saint Paul

2 Address 123 -Mansarovar

3 District jaipur

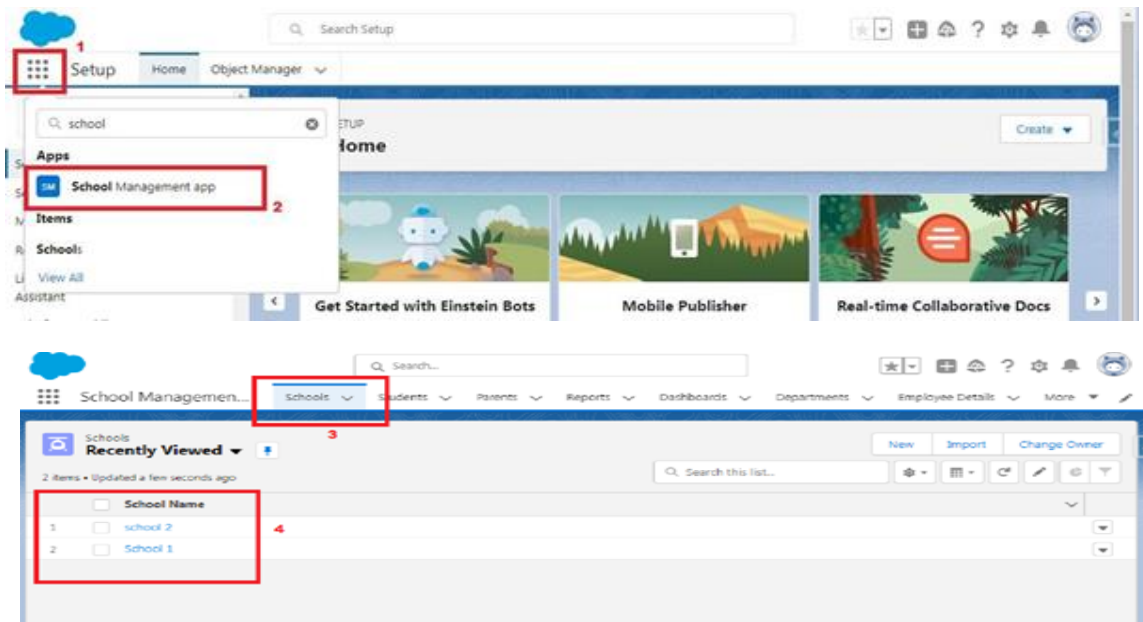
4 State Rajasthan

5 School website www.SaintPaul.com

6 Save

➤ View Record (School)

1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on any record name. you can see the details of the School.



➤ Delete Record (School)

1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on Arrow at right hand side on that Particular record.

5. Click delete and delete again.

