

Day 4 Assignment

Task1:

1. Create one profile named as Manager Profile (Standard Platform User)

The screenshot displays the Salesforce Setup interface for creating a new profile. The browser address bar shows the URL: `mirketa49-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5i000000Yt1t%3Fsetupid%3DEnhancedProfiles`. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Profiles' and shows the 'Manager Profile' configuration.

Profile Detail

Name	Manager Profile
User License	Salesforce Platform
Description	
Created By	Himanshu Tajne, 22/07/2022, 15:00
Modified By	Himanshu Tajne, 22/07/2022, 15:00

Page Layouts

Standard Object Layouts	Global	Payment
Global	Global Layout [View Assignment]	Payment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Payment Authorization [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Payment Gateway [View Assignment]
Account	Account Layout [View Assignment]	Payment Gateway Log [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	Payment Group [View Assignment]

2. Provide the app and object permission to the Manager profile

The screenshot shows the Salesforce Setup interface for the 'Manager Profile'. The left sidebar contains a search bar with 'profi' and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows the 'Manager Profile' configuration. The 'Assigned Apps' tab is selected, displaying a table of assigned applications.

App Name	Visible	Default
Aarogya Pharma (Aarogya_Pharma)	<input type="checkbox"/>	<input type="radio"/>
Almamate (Almamate)	<input type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
State Bank of India (State_Bank_of_India)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

The screenshot shows the Salesforce Setup interface for the 'Manager Profile'. The left sidebar contains a search bar with 'profi' and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows the 'Manager Profile' configuration. The 'Object Settings' tab is selected, displaying the 'Bank Accounts' configuration.

Bank Accounts

Tab Settings: Default On

Record Types and Page Layout Assignments

Record Types	Page Layout Assignment	Assigned Record Types	Default Record Type
--Master--	Bank Account Layout	<input checked="" type="checkbox"/>	<input type="radio"/>

Object Permissions

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

Field Permissions

3. Create one user and assign the Manager profile to him

The screenshot shows the Salesforce Setup interface with the 'Users' section selected in the left sidebar. The main content area displays the 'User Detail' for Chetan Gaidhane. The user's profile is 'Manager Profile', and they are assigned the 'Salesforce Platform' role. The 'Active' checkbox is checked. The 'User Detail' table lists various attributes including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Currency, and Delegated Approver. The 'Manager Profile' is highlighted in the 'Profile' column.

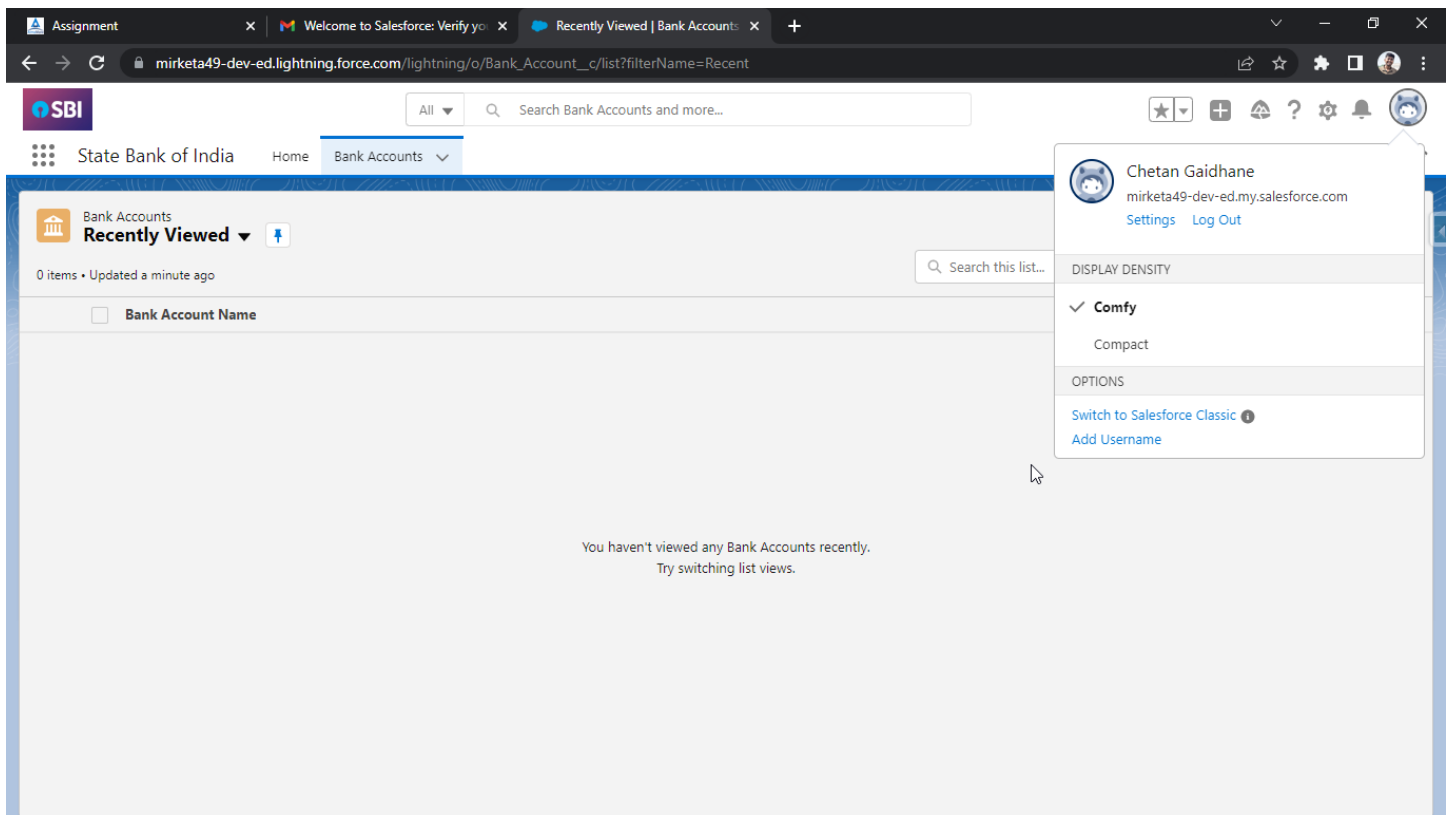
Attribute	Value	Attribute	Value
Name	Chetan Gaidhane	Role	Salesforce Platform
Alias	cgaid	User License	Manager Profile
Email	himanshutaine.sfdc@gmail.com	Profile	Manager Profile
Username	chetan@sbi.com	Active	<input checked="" type="checkbox"/>
Nickname	User16584833622907522389	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Currency	INR - Indian Rupee	Data.com User Type	i
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> i

4. Create one page layout and do all the modifications and assign this to Manager profile.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' section selected in the left sidebar. The main content area displays the 'Page Layouts' for the 'Bank Account' object. The 'Manager layout' is selected in the 'Page Layout To Use' dropdown. The table below shows the page layout assignments for different profiles. The 'Manager Profile' is highlighted in the 'Profiles' column.

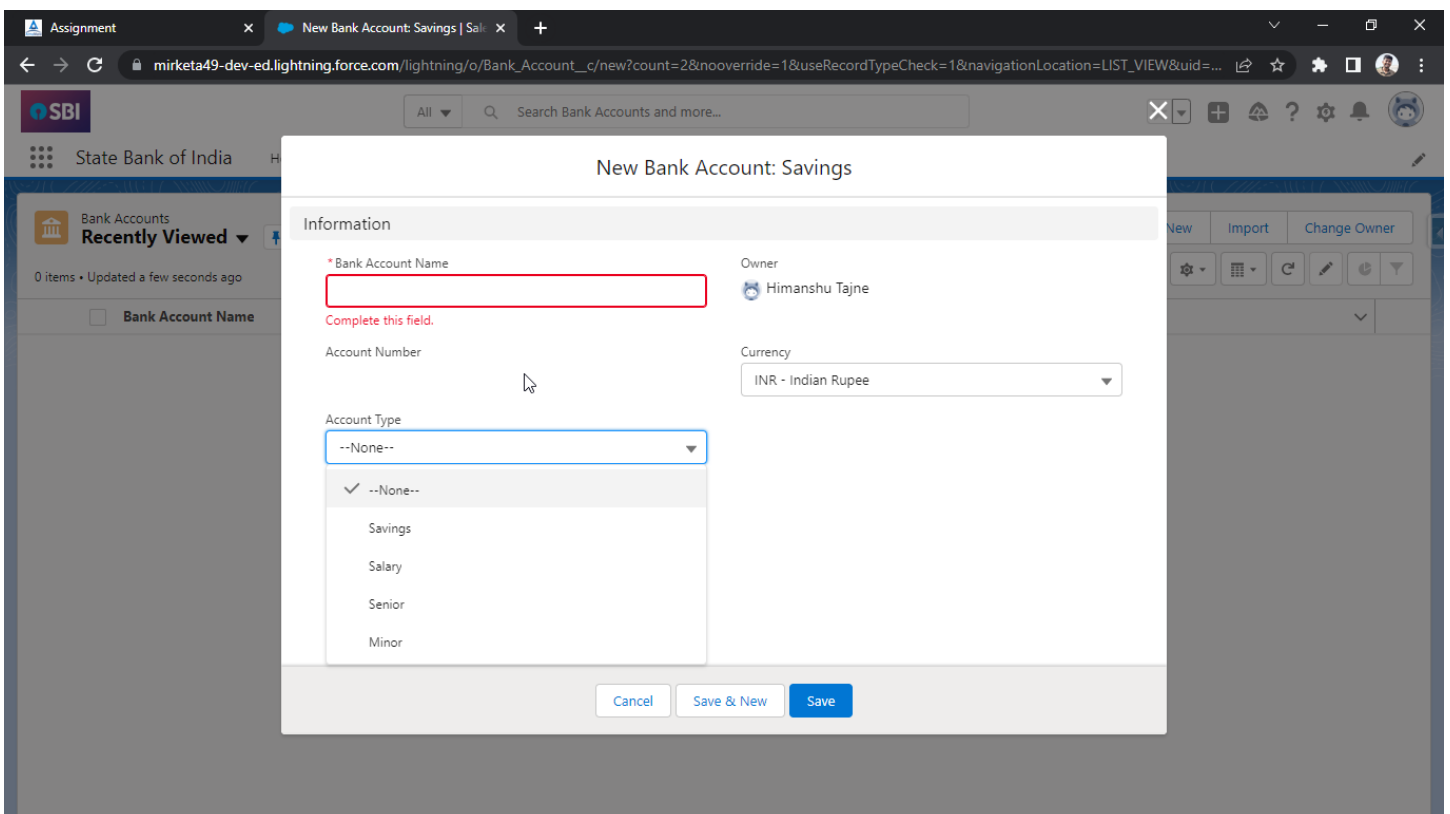
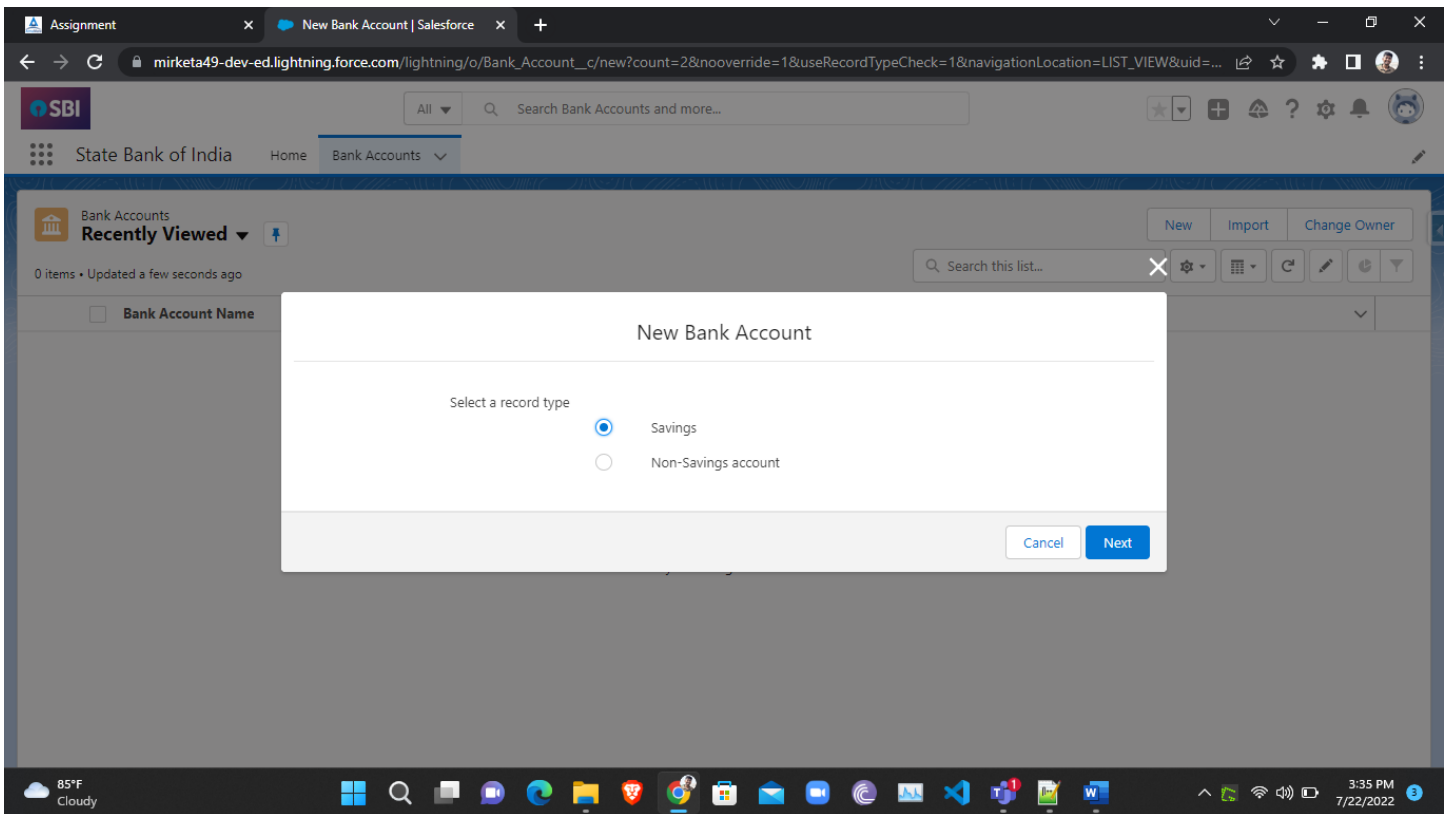
Profiles	Page Layout
Analytics Cloud Security User	Bank Account Layout
Chatter External User	Bank Account Layout
Chatter Free User	Bank Account Layout
Chatter Moderator User	Bank Account Layout
Contract Manager	Bank Account Layout
Cross Org Data Proxy User	Bank Account Layout
Custom: Marketing Profile	Bank Account Layout
Custom: Sales Profile	Bank Account Layout
Custom: Support Profile	Bank Account Layout
Force.com - App Subscription User	Bank Account Layout
Force.com - Free User	Bank Account Layout
Gold Partner User	Bank Account Layout
Identity User	Bank Account Layout
Manager Profile	Manager layout
Marketing User	Bank Account Layout
Minimum Access - Salesforce	Bank Account Layout
Partner App Subscription User	Bank Account Layout

5. Now Login with the Manager account and see the required changes.



Task2:-

Create one record type with name as Savings Account and another as Non Saving accounts. For Saving Account the account type values will be Senior , Saving and Minor Account and for non saving account the account type values will be DEmat account and current account.



Assignment x New Bank Account | Salesforce x +

mirketa49-dev-ed.lightning.force.com/lightning/o/Bank_Account__c/new?count=4&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=...

SBI

State Bank of India Home Bank Accounts

Bank Accounts Recently Viewed

0 items • Updated a minute ago

Search Bank Accounts and more...

New Import Change Owner

Search this list...

New Bank Account

Select a record type

☐ Savings

☒ Non-Savings account

Cancel Next

Assignment x New Bank Account: Non-Savings x +

mirketa49-dev-ed.lightning.force.com/lightning/o/Bank_Account__c/new?count=4&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=...

SBI

State Bank of India H

Bank Accounts Recently Viewed

0 items • Updated a minute ago

Search Bank Accounts and more...

New Import Change Owner

New Bank Account: Non-Savings account

Information

* Bank Account Name Owner Himanshu Tajne

Complete this field.

Account Number Currency INR - Indian Rupee

Account Type

--None--

✓ --None--

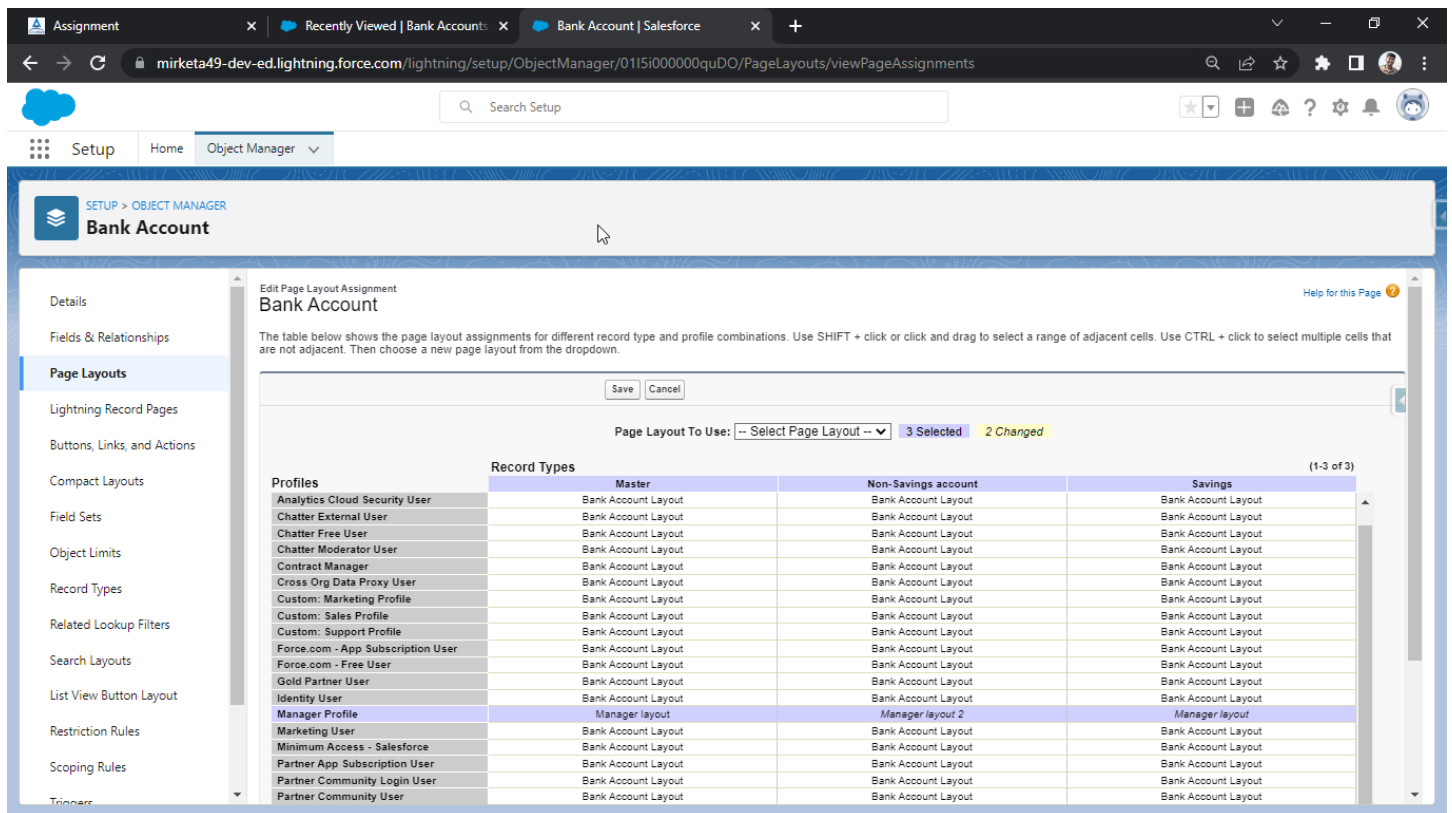
Current

Demat

Cancel Save & New Save

Task3:-

1. Create one field named as Address 2 of Text Area type in Bank Account object.
2. Create one page layout for the Bank Account object named as Manager Layout 2 .
3. Now in the Manager Layout remove the Address 2 Field ..
4. Now Go to the page layouts and page layout assignment , for record Type Saving Accounts assign the Manager layout and for the record Type Non Savings Account assign the Manager Layout 2 (For Manager Profile)
5. Now , when manager will login and use the record type as Savings he wont be able to see Address 2 whereas for the record type as Non savings he would be see Address 2 field...



The screenshot shows the Salesforce Setup interface for the 'Bank Account' object. The left sidebar lists various setup options, with 'Page Layouts' selected. The main content area displays the 'Edit Page Layout Assignment' for 'Bank Account'. A table shows the current page layout assignments for different record types and profiles. The 'Manager Profile' is highlighted, and the 'Manager layout 2' is assigned to the 'Non-Savings account' record type. The 'Manager layout' is assigned to the 'Savings' record type. The 'Manager layout 2' is also assigned to the 'Master' record type. The table has columns for Profiles, Record Types, and Page Layouts. The 'Manager layout 2' is assigned to the 'Non-Savings account' record type. The 'Manager layout' is assigned to the 'Savings' record type. The 'Manager layout 2' is also assigned to the 'Master' record type.

Profiles	Record Types	Page Layout
Analytics Cloud Security User	Master	Bank Account Layout
Chatter External User	Master	Bank Account Layout
Chatter Free User	Master	Bank Account Layout
Chatter Moderator User	Master	Bank Account Layout
Contract Manager	Master	Bank Account Layout
Cross Org Data Proxy User	Master	Bank Account Layout
Custom: Marketing Profile	Master	Bank Account Layout
Custom: Sales Profile	Master	Bank Account Layout
Custom: Support Profile	Master	Bank Account Layout
Force.com - App Subscription User	Master	Bank Account Layout
Force.com - Free User	Master	Bank Account Layout
Gold Partner User	Master	Bank Account Layout
Identity User	Master	Bank Account Layout
Manager Profile	Master	Manager layout
Marketing User	Master	Bank Account Layout
Minimum Access - Salesforce	Master	Bank Account Layout
Partner App Subscription User	Master	Bank Account Layout
Partner Community Login User	Master	Bank Account Layout
Partner Community User	Master	Bank Account Layout
	Non-Savings account	Manager layout 2
	Savings	Manager layout

