Task 1: Configure a role hierarchy and create 3 roles with different access scopes

1. Go to Setup and open the Quick Find box
2. Search and open Roles
3. Click Setup Roles
4. Click on add role under CEO
5. Now create 3 roles

Task 2: Apply sharing rules for a custom object to demonstrate row-level security.

1. Go to Object Manager
2. Click on Create > Custom Object
3. Go to Sharing Settings
4. Set default internal access to Private
5. Scroll to Sharing rules and click new

Task 3: Set field-level visibility restrictions for specific profiles (eg: hide revenue field for ‘Intern’ profile)

1. Go to Object Manager
2. Select object Project\_c
3. Select Status
4. Click on Set Field-Level Security
5. Uncheck visible for Marketing User profile
6. And Save

Task 4:

1. Search and open ‘Reports’ from the App Launcher
2. Click on New Report
3. Click on Campaigns with Leads and ‘Start Report’
4. Group by Campaign name and create report
5. Now Create report for Opportunity grouped by Stage

Task 5: Build a dashboard from the above reports and share it with a public group

1. Go to Dashboard and create a new dashboard
2. Click on Widget
3. Select New Campaigns with Leads Report and Opportunity by stage

Task 6:

1. Go to Quick Find and search for ‘Data import wizard’
2. Click on Data Import Wizard and scroll down
3. Click on ‘Launch Wizard’
4. Select Custom Object
5. Select Customer Information
6. Select Add new records
7. Select CSV
8. Click on Choose a file
9. Click on Next