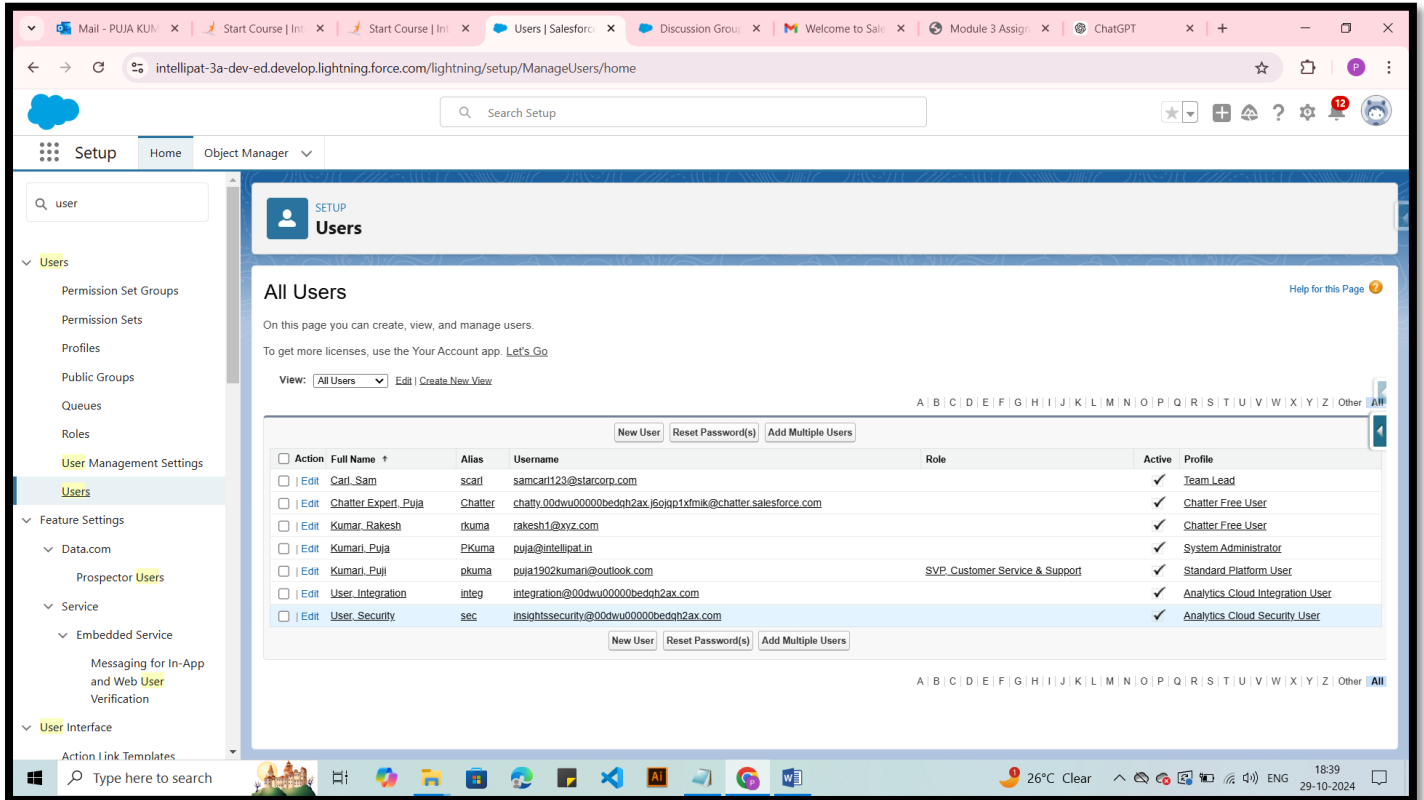


# SOLUTION ASSIGNMENT 3

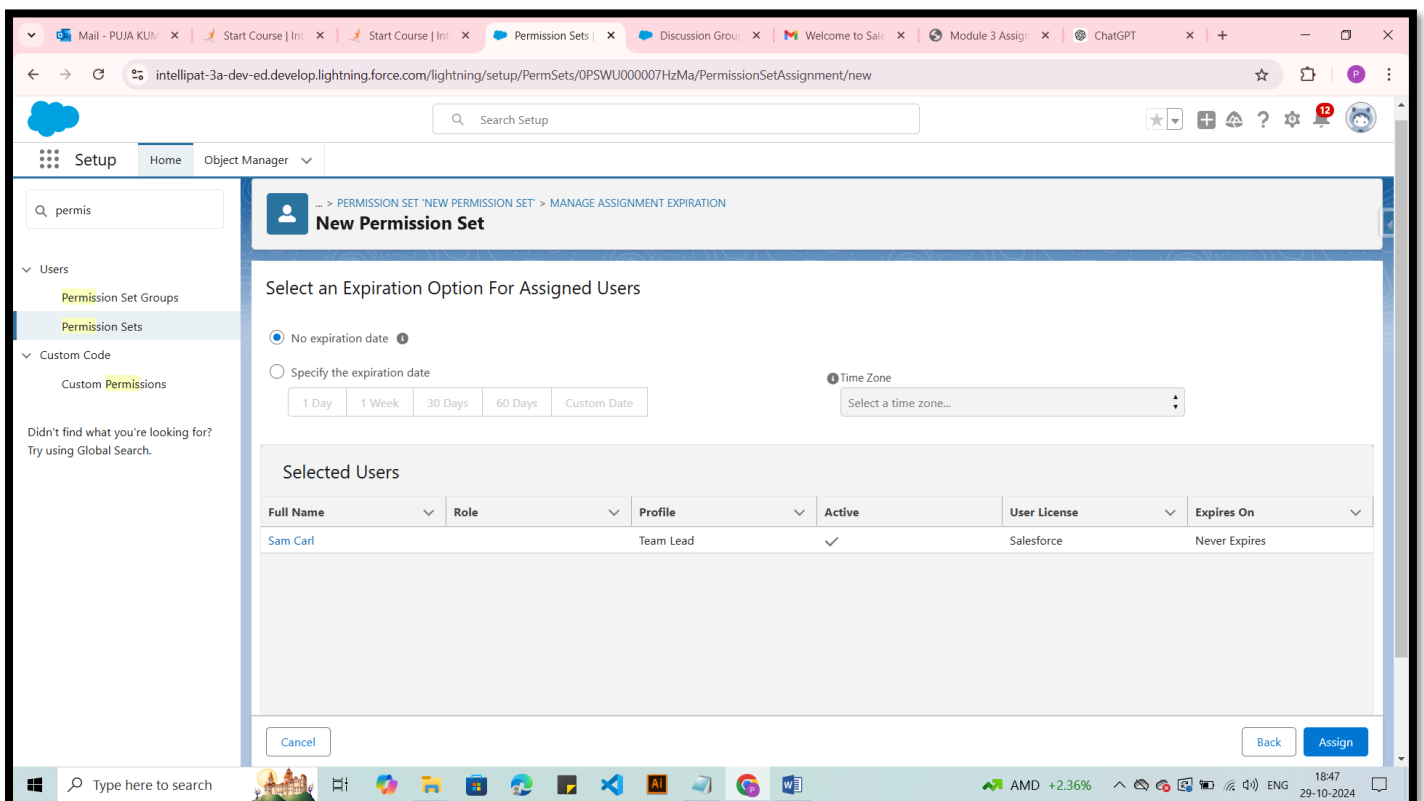
## 1. User Creation



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains navigation options like Users, Permission Set Groups, and Feature Settings. The main content area is titled "All Users" and provides instructions on creating, viewing, and managing users. A table lists existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table includes users like Carl Sam, Chatter Expert Puja, Kumar Rakesh, Kumari Puja, and User Integration. At the bottom, there are buttons for "New User", "Reset Password(s)", and "Add Multiple Users".

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Carl Sam	scarl	samcarl123@starcorp.com		✓	Team Lead
<input type="checkbox"/>   Edit	Chatter Expert Puja	Chatter	chatty.00dww0000bedgh2ax.j6oqpt1xfmik@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>   Edit	Kumar Rakesh	rkuma	rakesh1@xyz.com		✓	Chatter Free User
<input type="checkbox"/>   Edit	Kumari Puja	PKuma	puja@intellipat.in		✓	System Administrator
<input type="checkbox"/>   Edit	Kumari Puji	pkuma	puja1902kumari@outlook.com	SVP, Customer Service & Support	✓	Standard Platform User
<input type="checkbox"/>   Edit	User Integration	integ	integration@00dww0000bedgh2ax.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User Security	sec	insightssecurity@00dww0000bedgh2ax.com		✓	Analytics Cloud Security User

## 2. Permission Set



The screenshot shows the Salesforce Setup interface for creating a new permission set. The left sidebar contains navigation options like Users, Permission Set Groups, and Custom Permissions. The main content area is titled "New Permission Set" and provides instructions on selecting an expiration option for assigned users. A table lists the selected users with columns for Full Name, Role, Profile, Active status, User License, and Expires On. The table includes user Sam Carl. At the bottom, there are buttons for "Cancel", "Back", and "Assign".

Full Name	Role	Profile	Active	User License	Expires On
Sam Carl		Team Lead	✓	Salesforce	Never Expires

### 3. Assignment added in new Permission Set with Sam Carl

The screenshot shows the Salesforce Setup interface. A green notification banner at the top states "1 assignments were successful." Below this, the "New Permission Set" page displays an "Assignment Summary" table. The table has columns for Full Name, User License, Expires On, Time Zone, and Status. One row is visible for Sam Carl, with a status of Success. The left sidebar shows the navigation menu with "Permission Sets" selected. The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 18:47 on 29-10-2024.

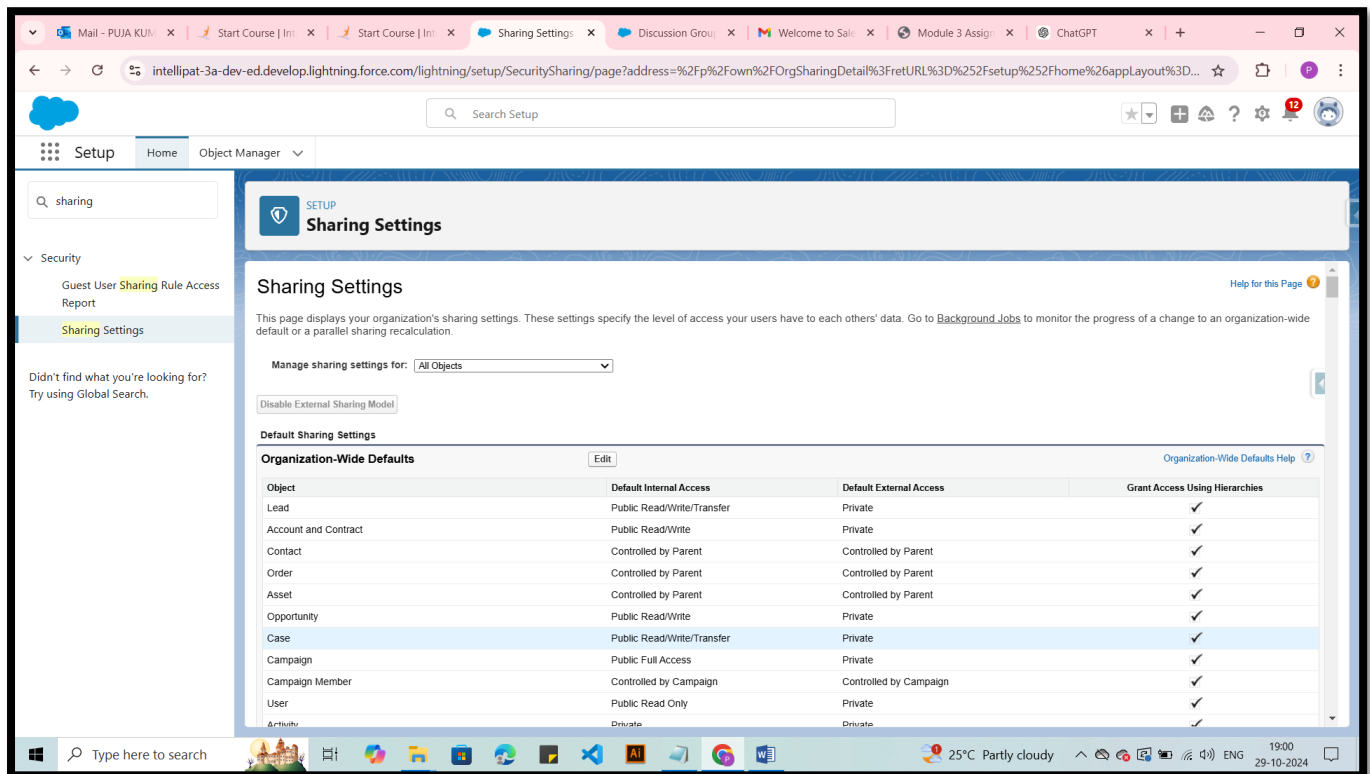
Full Name	User License	Expires On	Time Zone	Status
Sam Carl	Salesforce			Success

### 4. Field Level Security for Profile

The screenshot shows the Salesforce Setup interface for "Field Level Security for profile Sales Executive". The page displays a table with columns for Field Name, Field Type, Read Access, and Edit Access. The table lists various fields and their corresponding access permissions. The left sidebar shows the navigation menu with "Profiles" selected. The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 18:53 on 29-10-2024.

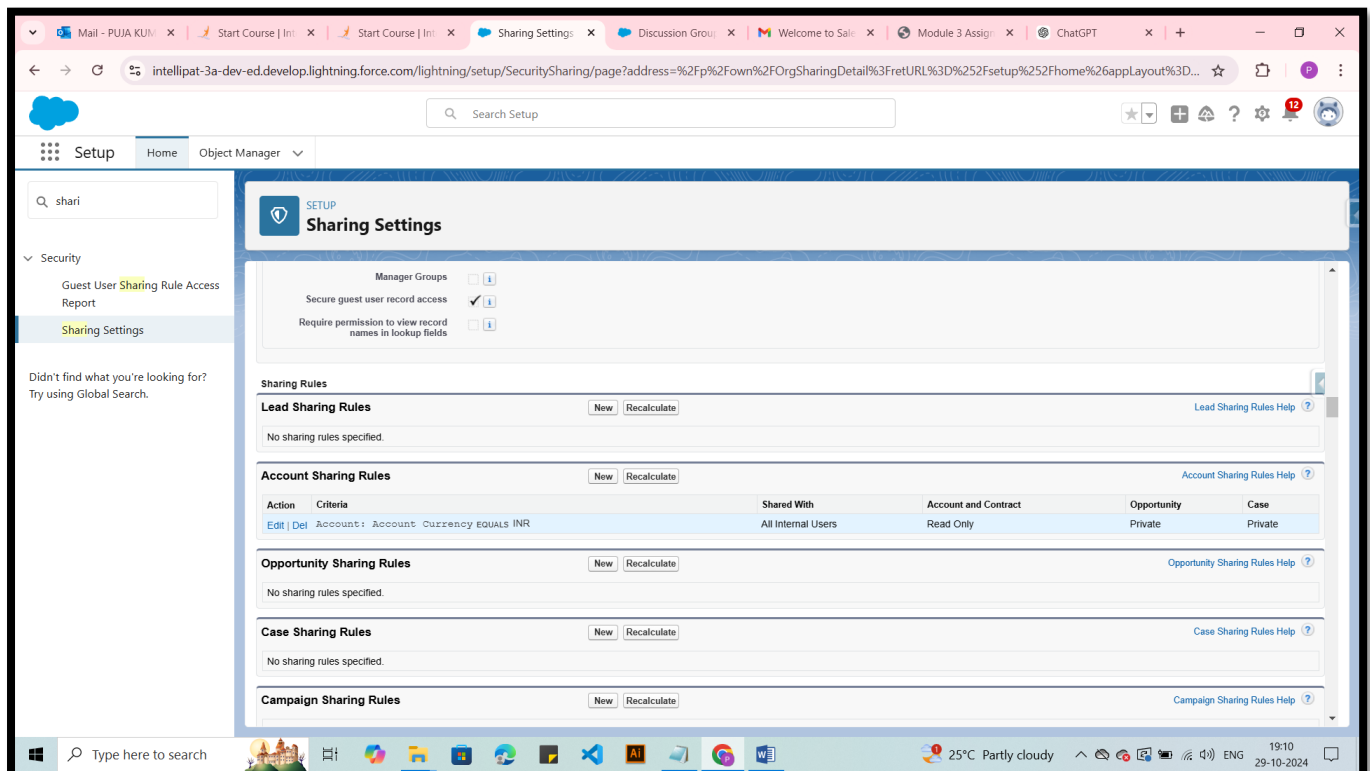
Field Name	Field Type	Read Access	Edit Access
Address	Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Annual Revenue	Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaign	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Clean Status	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company D-U-N-S Number	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Current Generator(s)	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D&B Company	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data.com Key	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Description	Long Text Area	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Do Not Call	Checkbox	<input type="checkbox"/>	<input type="checkbox"/>
Email	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email Opt Out	Checkbox	<input type="checkbox"/>	<input type="checkbox"/>
Fax	Fax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## 5. Record-level security to Sam using Sharing Setting



The screenshot shows the Salesforce Setup page for Sharing Settings. The left sidebar contains a search bar with "sharing" and a list of security-related items: Guest User, Sharing Rule Access Report, and Sharing Settings. The main content area is titled "Sharing Settings" and includes a description: "This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation." Below this is a dropdown menu for "Manage sharing settings for:" set to "All Objects". A button "Disable External Sharing Model" is visible. The "Default Sharing Settings" section features a table with columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists various objects and their corresponding access levels.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓



The screenshot shows the Salesforce Sharing Rules page. The left sidebar is similar to the previous screenshot, with "Sharing Settings" selected. The main content area is titled "Sharing Rules" and includes a section for "Manager Groups" with checkboxes for "Secure guest user record access" (checked) and "Require permission to view record names in lookup fields". Below this are sections for "Lead Sharing Rules", "Account Sharing Rules", "Opportunity Sharing Rules", "Case Sharing Rules", and "Campaign Sharing Rules". Each section has a "New" button, a "Recalculate" button, and a "Help" link. The "Account Sharing Rules" section is expanded, showing a table with columns: Action, Criteria, Shared With, Account and Contract, Opportunity, and Case. The table lists one rule: "Account: Currency EQUALS INR" with "All Internal Users" as the shared with entity and "Read Only" as the account and contract access level.

Action	Criteria	Shared With	Account and Contract	Opportunity	Case
Edit   Del	Account: Currency EQUALS INR	All Internal Users	Read Only	Private	Private

## 5. Record-level security to Sam using Role Hierarchy

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Home, Object Manager, Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area displays the 'Roles' section for the 'Technical Support' role.

### Roles

**Role**

## Technical Support

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Intellipat > CEO > SVP\_Customer\_Service\_&\_Support > Customer\_Support\_International > Technical Support

[Users in Technical Support Role \[1\]](#)

Role Detail	
Label	Technical Support
This role reports to	Customer_Support_International
Modified By	Puja Kumar   29/10/2024, 7:05 pm
Opportunity Access	Users in this role can <b>edit</b> all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access	Users in this role can <b>edit</b> all cases associated with accounts that they own, regardless of who owns the cases

**Users in Technical Support Role**

[Assign Users to Role](#) [New User](#)

Action	Full Name	Alias	Username	Active
<a href="#">Edit</a>	Sam Card	scard	samcard123@starcorp.com	✓

intellipat-3a-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00EWU000005k9S1%3Fsetupid%3DRoles

Search Setup

Setup

Home

Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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Role

Technical Support

Help for this Page

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Intellipat » CEO » SVP\_Customer Service & Support » Customer\_Support\_International » Technical Support

Users in Technical Support Role (1)

Role Detail

Edit

Delete

Label	Technical Support	Role Name	Technical_Support
This role reports to	Customer_Support_International	Role Name as displayed on reports	
Modified By	Puja_Kumari 29/10/2024, 7:05 pm	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Technical Support Role

Assign Users to Role

New User

Users in Technical Support Role Help

Action	Full Name	Alias	Username	Active
<a href="#">Edit</a>	Sam_Carl	scarl	samcarl123@starcorp.com	✓

Type here to search

Earnings upcoming

19:09

29-10-2024