

REPASS USER MANUAL



Repass: Everything you need to Know



Advantage of opting for Repass

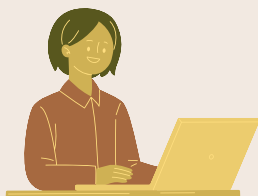


Repass Admin Management

- **Auth Settings**
- **Connect App Setting**
- **Permission Set**
- **Data Configuration Set up**
- **View & Edit exiting Data configuration Set up**



Roll Back Functionality using Repass



Insights Using Repass Reports and Dashboard

REPASS: Everything You Need to Know



Custom feature that enables the admin or user to monitor record in real time.



Real time data captures are termed as Change Events.



This feature allow you to configure and trace the change of any selected fields and objects in the system.



Ultimate solution to Retrieve the changes to any selected fields.



Any changes of the configured object will be captured By the repass and allow user to update the field With previous value.

4

❖ Configuration Service



Repass process is targeted and efficient.

❖ Tracing a Field



This allows users to trace all the changes made to the selected field.

❖ Rolling Back a Field



This allows the users to undo any changes that were made to the data.

Advantages of Opting for Repass

5

A Step-by-Step Guide to Repass Admin Management

System Admin : Set the Auth settings and add the permission set to the user and the Admin



01

System Administrators and users with the permissions can create a Configuration for Objects and Fields.



02

System administrator can add the rollback button in page layout.



03

A user must navigate to the Data and Select the Objects and Fields.



04

A user must navigate to the object that they want to rollback.



05

6

A Step-by-Step Guide to Repass Admin Management

STEP 1

SET UP AUTH SETTINGS & ASSIGN PERMISSION SETS

01

7

1 Access to the Setup

2 Search for certificate & Key Management

SetupHomeObject Manager

cert

Security

Certificate and Key Management

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

SETUP

Certificate and Key Management

Certificate and Key Management

Manage your certificates to authenticate single sign-on with an external website, use your org as an identity provider, or verify requests to external sites from Salesforce orgs.

Create, update, and archive your keys based on your organization's security needs.

For increased security, specify a certificate to use as your org's API client certificate. The API client certificate is used by workflow outbound messages, the AJAX proxy, some PageReference callouts.

A B C D E F G H I J K L M

Certificates

Create Self-Signed CertificateCreate CA-Signed CertificateExport to KeystoreImport from Keystore

Action	Label	Type	Active	Key Size	Expiration Date	Created Date
Edit Del	RepassAuthCert	Self-Signed	✓	2048	25/11/2024	25/11/2023, 16:38

You've created 1 non-expired certificate out of a limit of 50.

A B C D E F G H I J K L M

3 Create a self signed certificate

4 Enter the Label & Unique Name

cert

Security

Certificate and Key Management

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

SETUP

Certificate and Key Management

Certificates

When naming your certificates, only use letters, numbers, and underscores (but not two underscores in a row). The unique name needs to begin with a letter, and it can't end with an underscore. Select k requirements.

Certificate and Key Edit

Label

Unique Name

Type

Exportable Private Key

Test

Test

Self-Signed

☒

Key Size2048

SaveCancel

5 Save and Download the Certificate

SetupHomeObject Manager

certifi

Security

Certificate and Key Management

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

SETUP

Certificate and Key Management

Certificates

Help for this Page

Certificate and Key Detail

EditDeleteDownload Certificate

Label	TestCertificate	Unique Name	TestCertificate
Type	Self-Signed	Active	✓
Expiration Date	05/02/2025, 04:00	Created Date	05/02/2024, 10:39
Key Size	2048	Exportable Private Key	☒
Certificate	C=USA, ST=CA, L=San Francisco, O=Salesforce.com, OU=00D0C0000002X2b, CN=TestCertificate Expiration: 5 Feb 2025 00:00:00 GMT		

EditDeleteDownload Certificate

How to Create Connected Apps in Salesforce

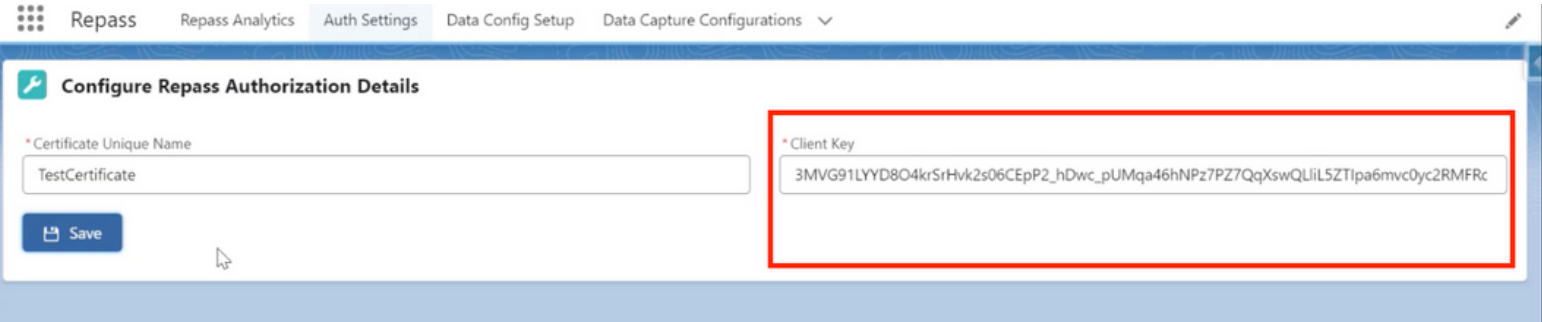
To create Connected Apps in Salesforce, do the following:

1. Log in to Salesforce as an administrator.
2. In the drop-down list of the account (in the upper-right corner), select **Setup**.
3. In the left-hand pane, go to **App Setup > Create > Apps**.
4. In the **Connected Apps** pane, click the **New** button.
5. On the **New Connected App** page, fill the following required fields under **Basic Information**:
 - **Connected App Name**. For example, Repass .
 - **API name**. For example, Repass.
 - **Contact Email**.
6. Go to **API (Enable OAuth Settings)**, and select **Enable OAuth Settings**.
 - In the **Callback URL** field, enter **https://login.salesforce.com/ (Any URL)**.
 - Select use digital Signature and upload the **Downloaded certificate**.
 - In the **Selected OAuth Scopes** field, select 1. **Access the Salesforce API platform**, 2. **Manage user data via API**, 3. **Perform request at anytime**, and then click **Add**.
7. Click the **Save** button to save the new Connected App.
8. In the **Connected Apps** list, find the App that you just created, and then click **Manage**.
 - a. On the page that opens, click the **Edit Policies** button.
 - b. Under **OAuth policies**, select **Admin Approved Users are pre-authorized** in the **Permitted Users** list, and then click the **Save** button.
9. Click on **Manage Profile**.
10. Select the profile that needs to be enabled for Repass and click the **Save** button.
11. Go back to the **Connected Apps** list, and click the App that you just created and click on **View**.
12. Go to **API (Enable OAuth Settings)**, Click on **Manager consumer details** and note down the **Consumer Key alone** which will be used for the configuration of Credential in Repass.

FINAL AUTH CONFIGURATION

To complete the final auth setting follow the below steps:

- 1. STEP 1: Get into **Repass App**
- 2. STEP 2: Click on **Auth Settings**
- 3. STEP 3: Enter the **certificate name** in the certificate unique Name Box and enter the consumer Key in the client Key box
- 4. STEP 4: Click the **Save** button.

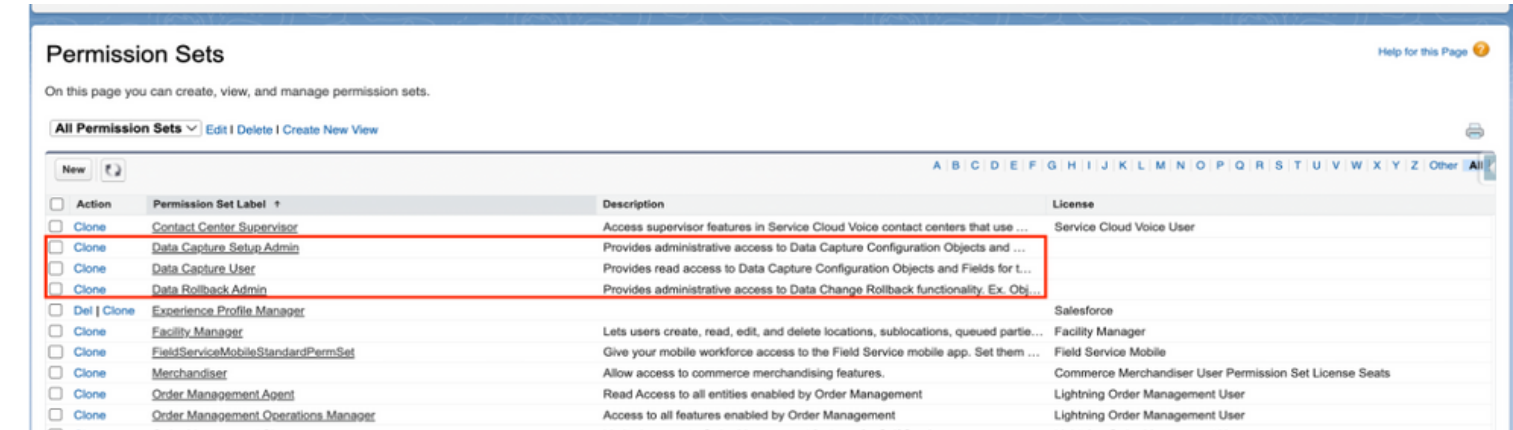


ASSIGN PERMISSION SET

1 Access to the Setup



2 Search for Permission Set



3 Manage permission set

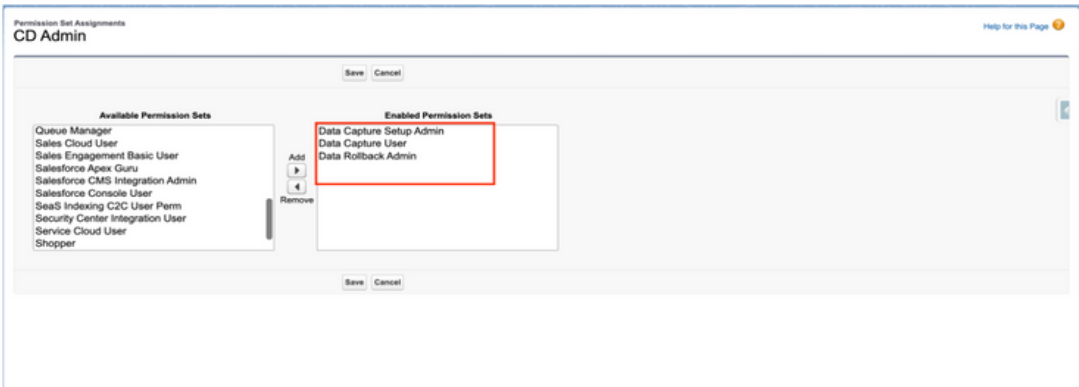


4 Assign the below permission set



System administrator allocates the below permission set to the users.

- 1. **Data Capture Setup Admin**
- 2. **Data Rollback Admin**
- 3. **Data Capture User**

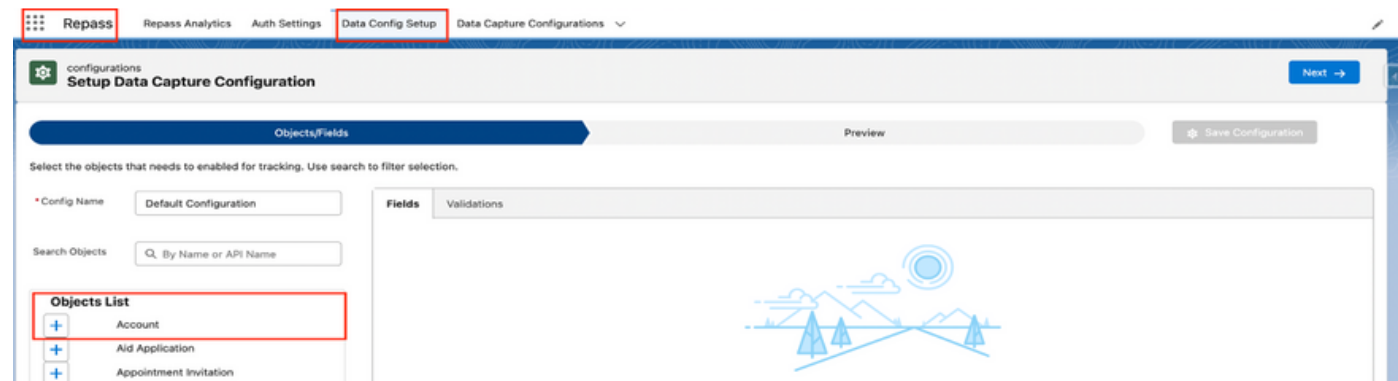


DATA CONFIGURATION SET UP

1 Launch Repass App



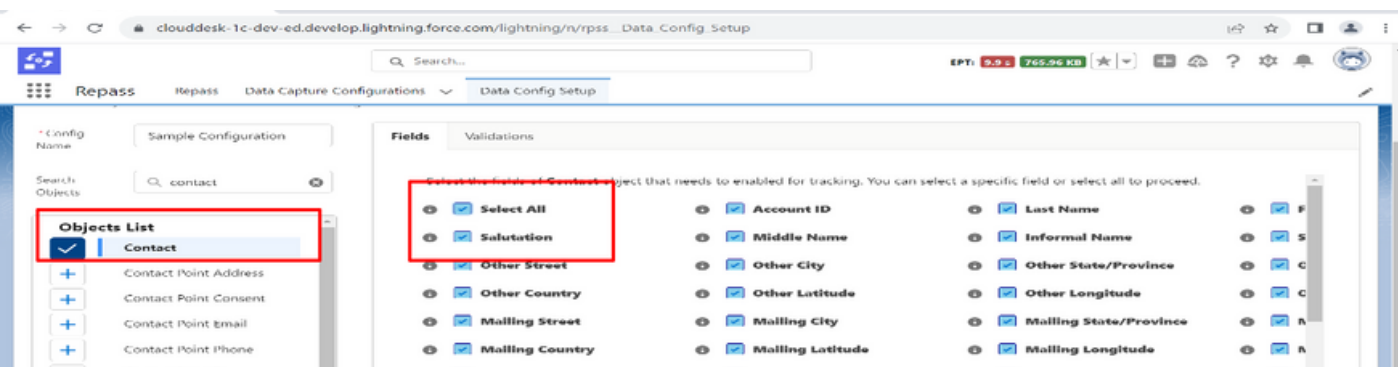
2 Click Data Config Setup



3 Name your configuration



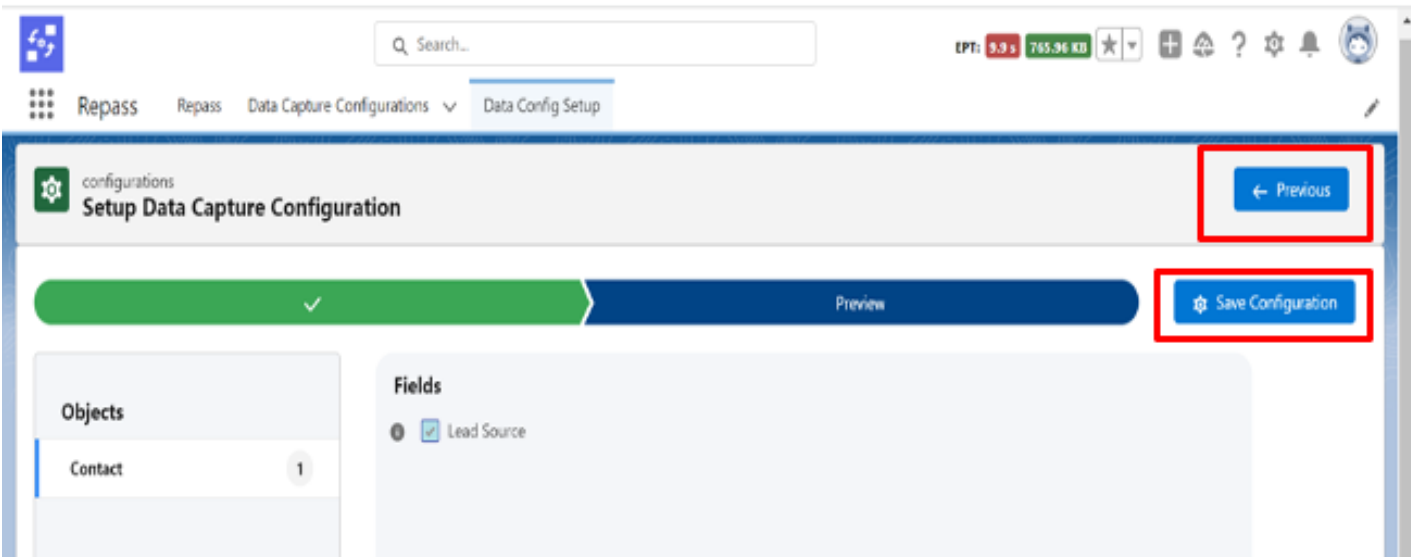
4 Select the Object & Field that needs to be added for roll back service



5 Click Next to preview



6 Preview the data and Save configuration



ADD THE ROLL BACK BUTTON IN THE PAGE LAYOUT

The administrator needs to include the Rollback button in the page layout of the Object configured within the Repass App

STEP 1: Open the object from Object Manager

STEP 2: Click the page layout

STEP 3: Mobile & Lightning Action --> Search for Roll back Button

STEP 4: Add the rollback button in the layout and Save the changes.

The screenshot displays the Salesforce 'Account' page layout editor. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts (highlighted with a red box), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Hierarchy Columns, and Scoping Rules. The main content area is titled 'Account Layout' and includes a 'Quick Find' search bar. Below the search bar, a table lists various fields and their properties. The 'Account Sample' section is visible, showing a 'Highlights Panel' and 'Quick Actions in the Salesforce Classic Publisher'. The 'Salesforce Mobile and Lightning Experience Actions' section is at the bottom, where the 'Rollback' button is highlighted with a red box. Other buttons in this section include Post, File, New Task, New Contact, History, New Case, Log a Call, New Note, New Opportunity, Question, Email, Change Owner, Include Offline, Check for New Data, Submit for Approval, Get Contacts, Edit, and De.

Fields	Account Number	Active	Created By	Description	Fax	NAICS Des
Buttons	Account Owner	Annual Revenue	Customer Priority	D-U-N-S Number	Industry	Number of
Custom Links	Account Currency	Account Site	Billing Address	DMB Company	Einstei Account ...	Last Modified By
Quick Actions	Account Name	Account Source	Clean Status	Data.com Key	Employees	NAICS Code
Mobile & Lightning Actions						Ownership
Expanded Lookups						
Related Lists						

How to Safely Revert Changes with Rollback Functionality

- 1

Change the value of the field (lead source)
- 2

Roll Back button will be displayed on the added object.

Repass

Repass

Data Capture Configurations

Data Config Setup

Andy Test Young | Contact

Mr Andy Test Young

+ Follow

New Case

New Note

Submit for Approval

Lead Source

Phone Inquiry

Asst. Phone

Mailing Address

Mailing Street

Other Address

Other Street

Ms. Jane Grey

+ Follow

Rollback

Printable View

University of Arizona

Dean of Administration

Department

Administration

Birthdate

14/01/1947

Reports To

Lead Source

Phone Inquiry

Other Phone

Fax

(520) 773-9060

Email

jane_gray@uoa.edu

Assistant

Asst. Phone

Get started by sending an email, scheduling a task,

No past activity. Past meetings and tasks marked as don

- 3

Click the Roll back Button
- 4

Roll back screen displays the field modifications.

Rollback

9 NO

Expand

Changed By

Changed Date Time

Rolled Back?

1

+

CD Admin

26 Jan 2024, 08:53 a.m.

2

+

CD Admin

26 Jan 2024, 08:53 a.m.

Select All

Field Name

Changed Value From

Changed Value To

LeadSource

Word of mouth

Phone Inquiry

Next

Load More

Rollback

5

Click on Rollback to revert the value to original value

Version Id

0038d00000NHpbbAAD_17062394093

Changed By

CD Admin

Changed Date

26 Jan 2024

Field Name

Current Value

Roll Back Value

Lead Source

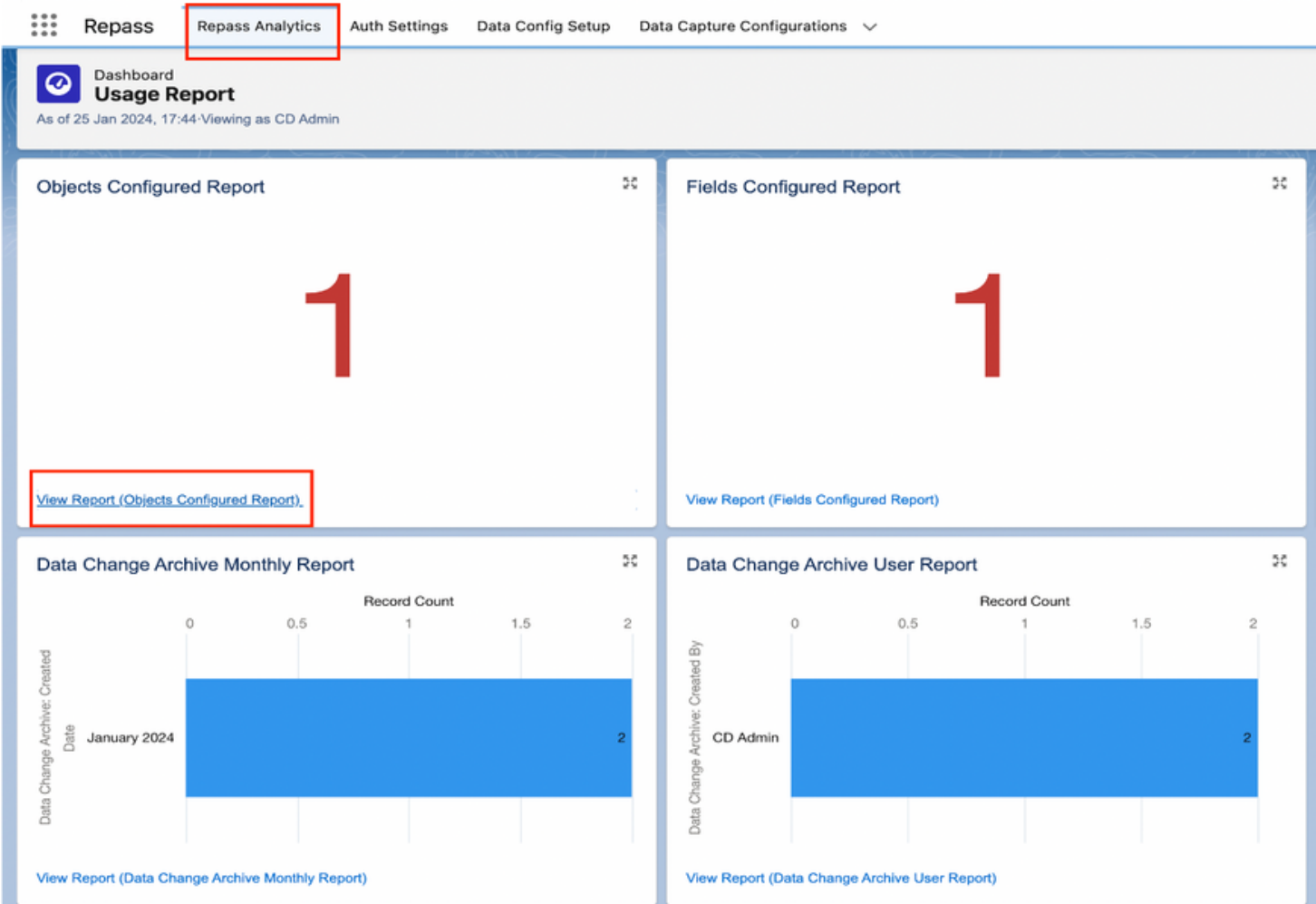
Phone Inquiry

Word of mouth

Roll Back

Unlocking Insights with Reports and Dashboards

REPASS APP --> REPASS ANALYTICS



Repass Analytics shows dashboard and reports can be extracted.