

SALESFORCE DEVELOPER (NAAN MUDHALVAN)

ASSIGNMENT 1

NAME: DEEPIKA S V

REG NO: 611220205002

NM ID: AU611220205002

BRANCH : B.TECH IT – IV YEAR

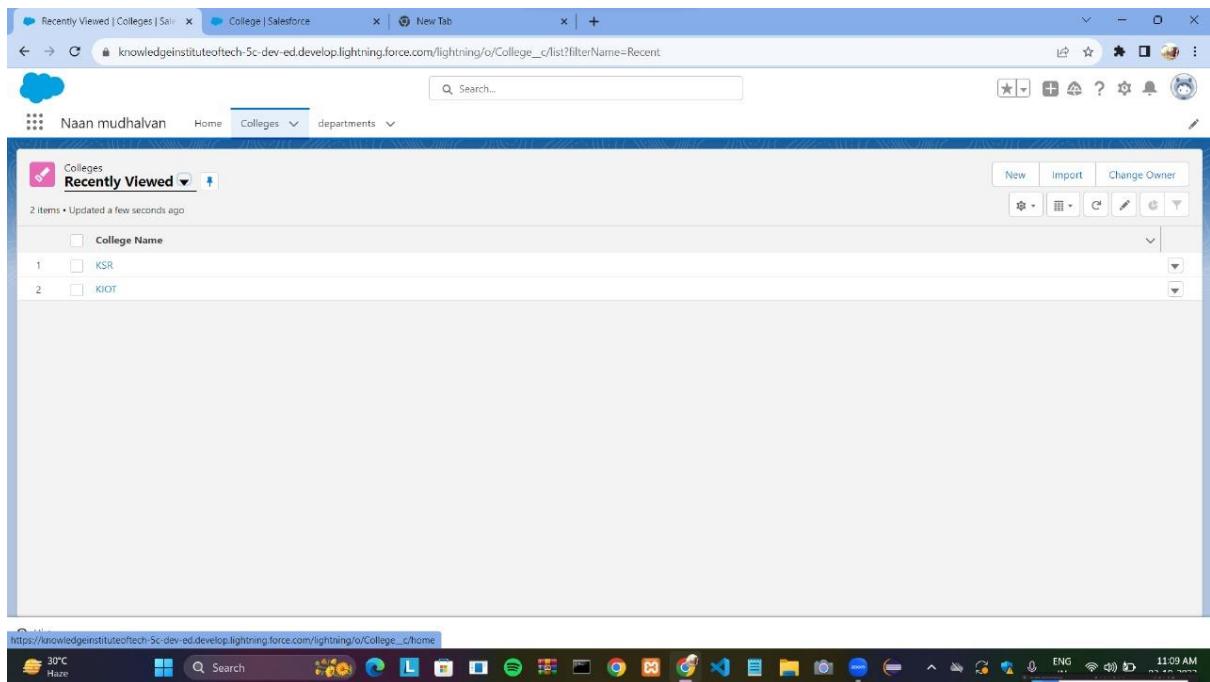
1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

Let's say you have two custom objects, "Parent_Object__c" and "Child_Object__c," and you want to establish a Master-Detail Relationship from Child_Object__c to Parent_Object__c as well as a Roll-Up Summary Field on Parent_Object__c to track the records that are related to Child_Object__c.

Create Custom Objects: Create the "Parent_Object__c" custom object if you haven't already.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A search bar at the top right contains the text 'Search Setup'. Below the header, there are tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'New Custom Object' under 'Custom Object Definition Edit'. It includes sections for 'Custom Object Information' (Label: 'Account', Plural Label: 'Accounts', Starts with vowel sound: unchecked), 'API Name' (Object Name: 'Account'), 'Description' (empty text area), 'Help Settings' (Context-Sensitive Help Setting: 'Open the standard Salesforce.com Help & Training window' is selected), 'Content Name' (None), and 'Record Name Label and Format' (Record Name: 'College Name', Example: 'Account Name', Data Type: 'Text'). At the bottom are 'Optional Features' checkboxes for various Salesforce features like Reports, Activities, and Chatter Groups, and 'Object Classification' checkboxes for Sharing, Bulk API Access, and Streaming API Access. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has 'Allow Search' checked. The 'Object Creation Options' section has 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object' unchecked. Buttons at the bottom include 'Save', 'Save & New', and 'Cancel'.

This screenshot shows the continuation of the 'New Custom Object' configuration page. It includes sections for 'Optional Features' (checkboxes for Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, and Enable Licensing), 'Object Classification' (checkboxes for Allow Sharing, Allow Bulk API Access, and Allow Streaming API Access), 'Deployment Status' (radio button for 'Deployed' selected), 'Search Status' (checkbox for 'Allow Search' checked), and 'Object Creation Options' (checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object' both unchecked). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.



Create the "Child_Object__c" custom object if you haven't already.

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: depika Example: Account

Plural Label: depiks Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: depika Example: Account

Description:

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Content Name: None

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: depika Name Example: Account Name

Data Type: Text

Optional Features

The image contains two screenshots of the Salesforce interface. The top screenshot shows the 'Object Manager' setup page for a custom object named 'Text'. It displays various configuration options under sections like 'Optional Features', 'Object Classification', 'Deployment Status', and 'Search Status'. The bottom screenshot shows a list of departments in the 'Recently Viewed' section of the 'College' tab. The list includes 'INFORMATION TECHNOLOGY' and 'CSE'.

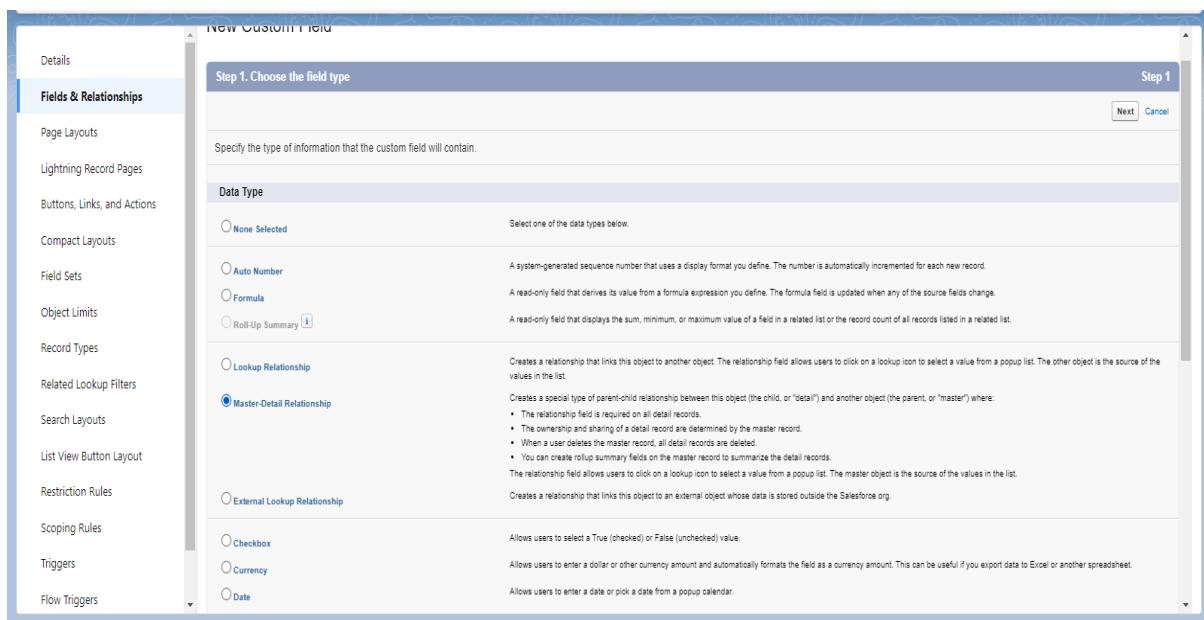
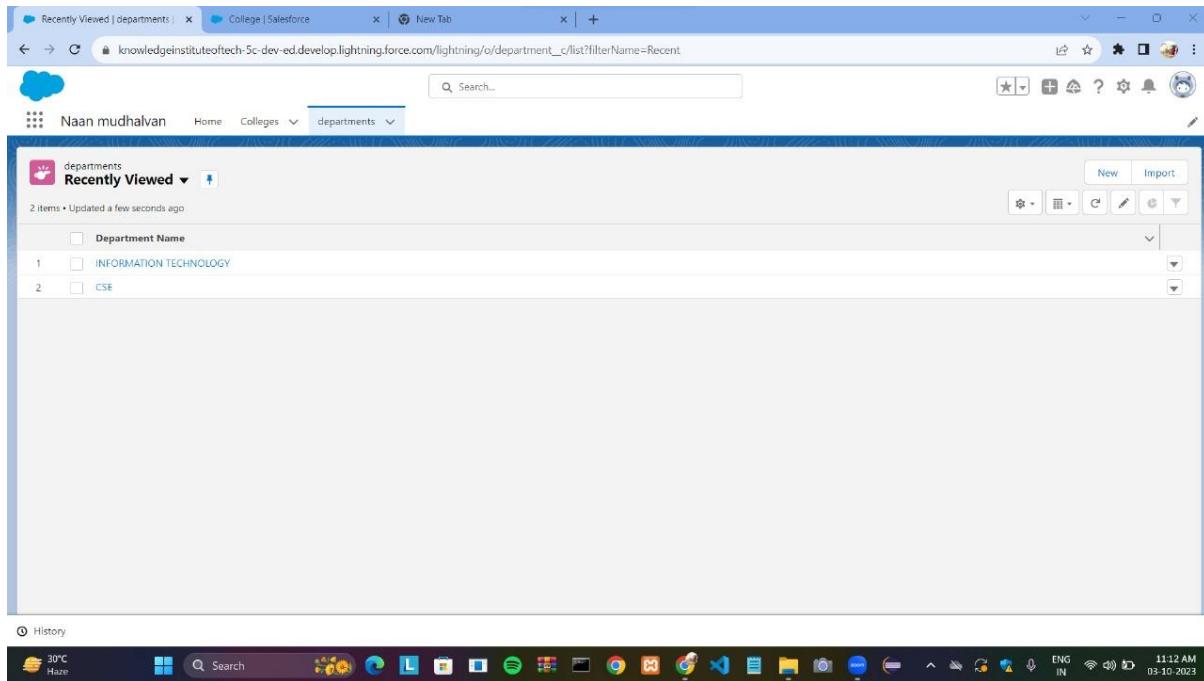
Establish a master-detail relationship: - Click "Setup" in the top-right corner by selecting the gear icon.

- 1) Select "Object Manager" from the list of "Objects and Fields."
- 2) To access its options, click "Child_Object__c".
- 3) Select "New Relationship" under "Fields & Relationships" in the menu.
- 4) Select the "Master-Detail Relationship" relationship type.
- 5) "Parent_Object__c" should be chosen as the parent object.

6) Give the connection a name that has meaning, such as "Parent Relationship."

7) Click "Next" to complete the process after defining additional settings such as whether they

are required or not.



TAINER NAME
New Relationship

Step 4. Establish field-level security for reference field

Field Label: TAINER NAME
Data Type: Master-Detail
Field Name: TAINER_NAME
Description:

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	✓	□
Analytics Cloud Security User	✓	□
Authenticated Website	✓	□
Authenticated Website	✓	□
Contract Manager	✓	□
Cross Org Data Proxy User	✓	□
Custom: Marketing Profile	✓	□
Custom: Sales Profile	✓	□
Custom: Support Profile	✓	□
Customer Community Login User	✓	□
Customer Community Plus Login User	✓	□
Customer Community Plus User	✓	□
Customer Community User	✓	□

Help for this Page ?

Step 4 of 6

Previous Next Cancel

TAINER NAME
New Relationship

Step 5. Add reference field to Page Layouts

Field Label: TAINER NAME
Data Type: Master-Detail
Field Name: TAINER_NAME
Description:

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field: Page Layout Name
 TAINER NAME Layout

Help for this Page ?

Step 5 of 6

Previous Next Cancel

TAINER NAME
New Relationship

Help for this Page ?

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers

Step 6. Add custom related lists Step 6 of 6

Field Label TAINER NAME
Data Type Master-Detail
Field Name TAINER_NAME
Description

Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label **TAINER NAMES**

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List Page Layout Name tainer Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

CSE | department | Salesforce College | Salesforce New Tab

knowledgeinstituteoftech-5c-dev-ed.lightning.force.com/lightning/r/department_c/a085j00000H5gygAAB/view

Naan mudhalvan Home Colleges departments

Search...

Related Details

Department Name CSE
College KSR

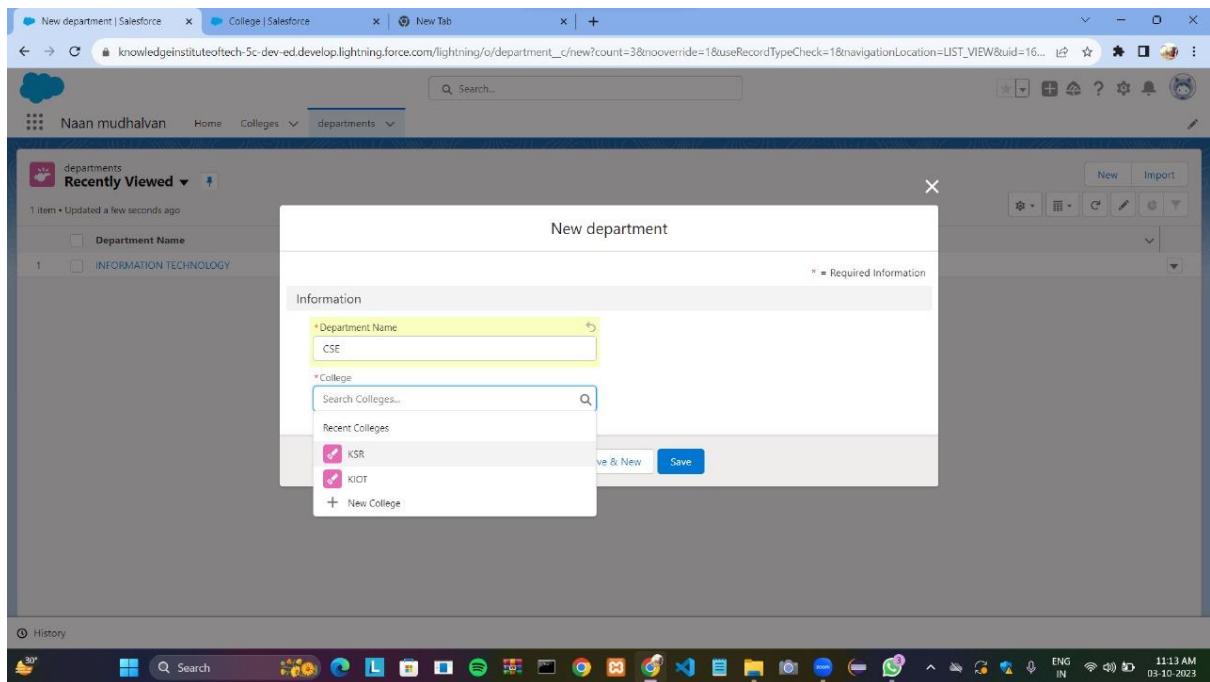
Created By DEEPIKA S V. 03/10/2023, 11:13 am Last Modified By DEEPIKA S V. 03/10/2023, 11:13 am

New Contact Edit New Opportunity

History

30° Search

11:13 AM 03-10-2023



Create a field for a roll-up summary:

- 1) Return to the "Parent_Object__c" settings after building the Master-Detail Relationship.
- 2) Click on "New" under "Fields & Relationships" and choose "Roll-Up Summary."
- 3) Pick the "Child Relationship Name" (made in step 2); an example might be "Child_Object__r"
- 4) Select the aggregation operation, in this example "Count".
- 5) Create a descriptive field label, such as "Total Child Records".
- 6) Define other field characteristics if desired.
- 7) To construct the Roll-Up Summary Field, click "Next" and then "Save".

college

New Custom Field

Help for this Page 

Step 1. Choose the field type

Step 1

Next Cancel

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Boolean Allows users to select a True (checked) or False (unchecked) value.

Rename Tabs and Labels

Tabs

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

Custom Tabs

Help for this Page 

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Book1	 Box	
Edit Del	Research Proposal	 Square	
Edit Del	student	 Box	

Web Tabs

New What Is This?

No Web Tabs have been defined.

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined.

Lightning Component Tabs

New What Is This?

No Lightning component tabs have been defined.

Lightning Page Tabs

New What Is This?

No Lightning Page Tabs have been defined.

Details college [Help for this Page](#)

New Custom Field

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Step 5. Add to page layouts Step 5 of 5

Field Label	Total count
Data Type	Roll-Up Summary
Field Name	Total_count
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 college Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Details college [Help for this Page](#)

New Custom Field

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Step 4. Establish field-level security Step 4 of 5

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Ann Subsriptiin User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

[Previous](#) [Next](#) [Cancel](#)

college
New Custom Field

Help for this Page ?

Step 3 of 5

Previous Next Cancel

Select Object to Summarize

Master Object college
Summarized Object CDepartments

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate None

Filter Criteria

All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Previous Next Cancel

College KIOT

New Contact Edit New Opportunity ▾

Related Details

College Name	Owner
KIOT	DEEPIKA S V
Total count	
1	
Created By	Last Modified By
DEEPIKA S V, 03/10/2023, 11:04 am	DEEPIKA S V, 03/10/2023, 11:05 am

History



2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

To create a user in Salesforce, you'll typically need administrator or delegated permissions. Here are the general steps to create a new user:

Log in to Salesforce:

- Log in to your Salesforce instance with an account that has administrative privileges.

Access the User Setup:

- Click on your profile picture or the user icon in the top-right corner.
- Select "Setup" from the dropdown menu.

Navigate to User Management:

- In the left-hand sidebar, under "Administer," click on "Users."

Create a New User:

- Click on the "New User" button or link to begin creating a new user.

Fill in User Details:

- Fill in the user's information, such as First Name, Last Name, Email, Username (typically an email address), and Alias (used in reports).
- Assign a Role to the user to determine their access within the role hierarchy.
- Choose a License Type (e.g., Salesforce, Chatter Free, or a specific app license).
- Assign a Profile to the user to determine their permissions and settings.

Save the User:

- Click the "Save" button to create the user.

Assign a Password:

- After saving the user, you'll be prompted to assign a temporary password.
- Communicate this temporary password to the user, who will need to change it upon their first login.

Verify User Creation:

- Log out of your administrator account and log in as the newly created user to ensure they have the expected access and permissions.

The screenshots illustrate the Salesforce Setup interface for managing users. The top screenshot shows the 'All Users' list, which includes columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The bottom screenshot shows the 'User Edit' screen for a specific user, allowing for detailed configuration of user information and roles.

There are four ways you can manage record-level access. They are presented in ascending order of access. The most stringent degree of data protection is achieved using the organization-wide settings, and as needed, access is then granted to specific users using the various record-level security measures.

The default level of access that users have to one another's records is defined by organization-wide defaults.

Role hierarchies make guarantee that bosses have access the same information as their subordinates. A user or group of users may require a certain amount of data access, which is represented by each role in the hierarchy.

Sharing rules allow specific user groups access to documents they don't own or ordinarily can't see by automatically deviating from the organization's default settings.

Owners of records can offer read-only and edit access manually.

	Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
1	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	HS
2	Dickenson plc		KS	(785) 241-6200	Customer - Channel	HS
3	Edge Communications		TX	(512) 757-6000	Customer - Direct	HS
4	Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	HS
5	GenePoint		CA	(650) 867-3450	Customer - Channel	HS
6	Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	HS
7	HARISH S	Tamil Nadu		06379523138	Customer - Direct	HS
8	Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	HS
9	Sample Account for Entitlements					autopro
10	sForce		CA	(415) 901-7000	Customer - Direct	HS
11	United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	HS
12	United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	HS
13	United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	HS
14	University of Arizona		AZ	(520) 773-9050	Customer - Direct	HS

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	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓

Role hierarchies ensure managers have access to the same records as their subordinates. Each role in the hierarchy represents a level of data access that a user or group of users needs.

Permission Sets:

- Create two permission sets, one for User A and one for User B.

Object-Level Security:

- In each profile and permission set, set the object-level security for the Account object to "Read" to ensure that both User A and User B can view Account records.

Record-Level Security:

- Implement record-level security using Criteria-Based Sharing Rules.
- Create a sharing rule that shares Account records owned by User A with User A and records owned by User B with user B.
- For the sharing rule criteria, specify that records owned by User A are shared with user A, and records owned by User B are shared with User B.

Ownership:

- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

Organization-Wide Defaults:

- Set the organization-wide defaults for the Account object to "Private" to ensure that records are private by default.

Testing: • Test the setup by logging in as User A and User B separately to verify that they cannot access each other's records.

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43 | Reset Password | Salesforce | Finish update

The screenshot shows the Salesforce Setup interface under the Users section. The left sidebar is expanded to show 'Permission Set Groups' and 'Permission Sets'. The main content area is titled 'Permission Sets' and displays a table of existing permission sets. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. Some rows have a yellow warning icon next to them. The 'Description' column contains brief descriptions of each permission set, such as 'Allows access to the store. Lets users see products and categories...' for 'Access to activity' and 'Includes all Buyer capabilities, and allows access to manage carts and...' for 'Buyer'. The 'License' column lists various Salesforce licenses like 'B2B Buyer Permission Set One Seat', 'CRM User', and 'Service Cloud Voice User'. A navigation bar at the bottom of the table includes links for 'All', 'A|B|C|D|E|F|G|H|I|J|K|L|M|N|O|P|Q|R|S|T|U|V|W|X|Y|Z|Other|All|' and 'Page 1 of 2'.

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43 | Reset Password | Salesforce | Finish update

The screenshot shows the Salesforce Setup interface under the Users section. The left sidebar is expanded to show 'Permission Set Groups' and 'Permission Sets'. The main content area is titled 'Permission Sets' and shows a 'Create' form. The 'Label' field is filled with 'salesmanager', and the 'API Name' field is also filled with 'salesmanager'. The 'Description' field is empty. Below the form, there is a note about session activation and a section for selecting user types. At the bottom of the page are 'Save' and 'Cancel' buttons.

Screenshot of the Salesforce Setup interface showing the Permission Sets page.

Left Sidebar:

- Search bar: user
- Users section:
 - Permission Set Groups
 - Permission Sets (selected)
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
 - Users (selected)
- Feature Settings:
 - Data.com
 - Prospector Users
 - Service:
 - Embedded Service:
 - Messaging for In-App and Web User Verification
 - User Interface:
 - Action Link Templates
 - Actions & Recommendations

Right Panel - Permission Set Overview:

Permission Set: salesmanager

API Name	Namespace Prefix
salesmanager	GOPAL_S

Object Settings:

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.

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

Apex Class Access: Permissions to execute Apex classes.

Visualforce Page Access: Permissions to execute Visualforce pages.

External Data Source Access: Permissions to authenticate against external data sources.

Flow Access: Permissions to execute Flows.

Screenshot of the Salesforce Setup interface showing the Permission Sets page.

Left Sidebar:

- Search bar: user
- Users section:
 - Permission Set Groups
 - Permission Sets (selected)
 - Profiles
 - Public Groups
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 - User Management Settings
 - Users (selected)
- Feature Settings:
 - Data.com
 - Prospector Users
 - Service:
 - Embedded Service:
 - Messaging for In-App and Web User Verification
 - User Interface:
 - Action Link Templates
 - Actions & Recommendations

Right Panel - Object Settings:

Object Settings:

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invites	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

Screenshot of the Salesforce Setup interface showing the Permission Sets page for the 'salesmanager' permission set.

The left sidebar shows the navigation menu under 'Users':

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Object Permissions' section is shown:

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

The URL in the browser bar is: <https://artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%3Fs%3DEntityPermissions%26o%3D...>

Screenshot of the Salesforce Setup interface showing the Permission Sets page for the 'salesmanager' permission set.

The left sidebar shows the navigation menu under 'Users':

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Object Permissions' section is shown:

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

The URL in the browser bar is: <https://artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%2Fe%3Fs%3DEntityPermissions%26o%3D...>

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 42.0 | Reset Password | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/OP55j000008Phok/PermissionSetAssignment/home

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

Add Assignment

salesmanager

Current Assignments

No assignments defined.



Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

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artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/OP55j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

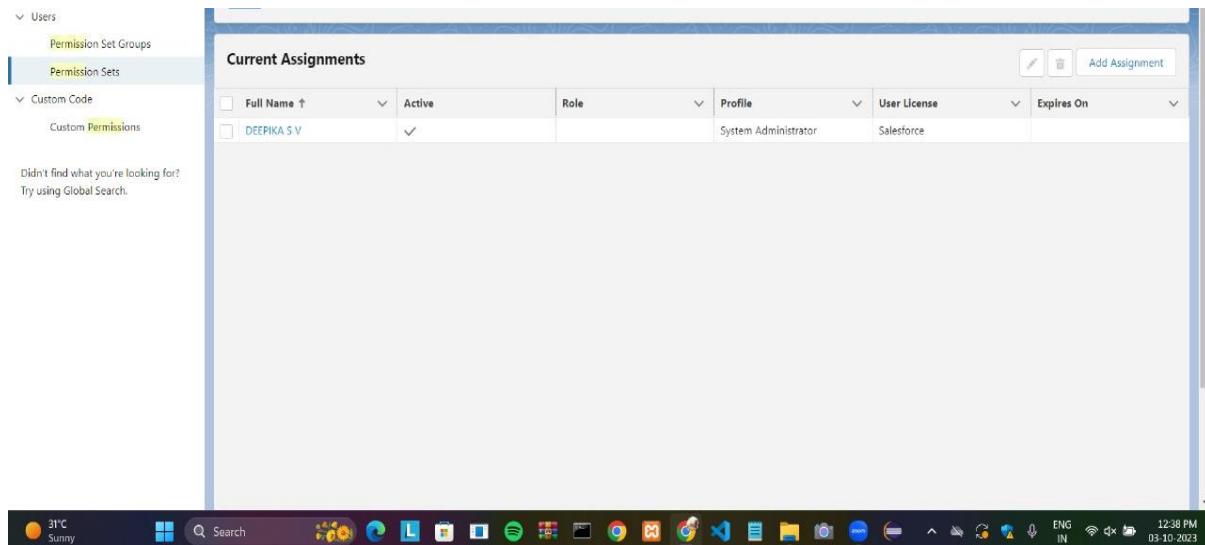
Select Users to Assign

All Users

1 item selected

Full Name	Role	Profile
Amelia Ellington	Force.com - App Subscription User	aelli
Chatter Expert	Chatter Free User	chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com
Diya Adanna	UMS User	test_diya_pas.4w8bjybi9wik.tszgrgsbkpx.3gj8ofovzwns.h43bkzw6mea@gmail.com
GOPAL S	System Administrator	kiot520@gmail.com
Integration User	Analytics Cloud Integration User	integration@00d5j00000bcskkeab.com
madhu b	salesmanage	mb
Security User	Analytics Cloud Security User	insightssecurity@00d5j00000bcskkeab.com
sowmiya bala	Manager	sbala

Cancel Next



3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

1.Create a New Permission Set:

- Go to Setup > Permission Sets and click "New Permission Set."

2. Define Object Permissions:

- In the Permission Set, go to "Object Settings" and find the Account object.
- Edit the permissions for the Account object in the Permission Set.
- Grant the "Delete" permission to the user you want to allow to delete records. Leave it unchecked for the other user.

3.Assign Permission Sets:

- Assign the newly created Permission Set with the "Delete" permission to the user you want to grant this access to.

4.Remove Delete Access from Profile:

- Go to the profile assigned to both users.
- In the profile settings, remove the "Delete" permission for the Account object.

Profile Creation:

Creating profiles and add to the existing user to grant the permission set.

Profile standard profile -no acct

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail		Custom Profile	
Name	standard profile -no acct	User License	Salesforce Platform
Description	Salesforce Platform	Created By	HARISH_S 30/09/2023, 02:11 pm
Modified By	HARISH_S 02/10/2023, 12:36 pm		
Page Layouts			
Standard Object Layouts	Global	Operating Hours	Operating Hours Layout
Email Application	Global Layout [View Assignment]	Not Assigned	[View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order	Order Layout [View Assignment]
Account	Account Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment	Payment Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Payment Authorization	Payment Authorization Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Authorization Adjustment	Payment Authorization Adjustment Layout [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Payment Gateway	Payment Gateway Layout [View Assignment]
Assigned Resource	Assigned Resource Layout [View Assignment]	Payment Gateway Log	Payment Gateway Log Layout [View Assignment]
		Payment Group	Payment Group Layout [View Assignment]

Profile Demo std user profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail		Custom Profile	
Name	Demo std user profile	User License	Customer Community
Description	Salesforce Platform	Created By	HARISH_S 02/10/2023, 12:22 pm
Modified By	HARISH_S 02/10/2023, 12:22 pm		
Page Layouts			
Standard Object Layouts	Global	Order	Order Layout
Email Application	Global Layout [View Assignment]	Not Assigned	[View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product	Order Product Layout [View Assignment]
Account	Account Layout [View Assignment]	Payment	Payment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment Authorization	Payment Authorization Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment	Payment Authorization Adjustment Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Gateway	Payment Gateway Layout [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Payment Gateway Log	Payment Gateway Log Layout [View Assignment]
Assigned Resource	Assigned Resource Layout [View Assignment]	WhatsApp	Payment Group Layout [View Assignment]

Permission Sets:

The screenshot shows the Salesforce Setup interface. The left sidebar has 'Setup' selected under 'Object Manager'. A search bar at the top says 'Search Setup'. The main content area is titled 'Permission Sets' and shows the 'Experience Profile Manager' permission set. It includes fields for Description, License, Session Activation Required, API Name, Namespace Prefix, and Created By. Below this is an 'Apps' section with various settings like Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, Flow Access, and Named Credential Access.

The screenshot shows the Salesforce Setup interface under the Profiles section. It lists three profiles: Books, departments, and harishi. Under each profile, there are sections for Contact Point Emails, User External Credentials, and Custom Object Permissions. The Custom Object Permissions table shows the following access levels:

Object	Basic Access					Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All
Books	<input checked="" type="checkbox"/>										
departments	<input checked="" type="checkbox"/>										
harishi	<input checked="" type="checkbox"/>										

Session Settings include Session Times Out After (2 hours of inactivity) and Session Security Level Required at Login (None). The Password Policies section defines password expiration (90 days), history (3 passwords remembered), length (8), complexity (must include alpha and numeric characters), and other requirements.

The screenshot shows the Salesforce Setup interface under the Permission Sets section. It displays the Experience Profile Manager for the Accounts permission set. The Tab Settings section shows the 'Available' tab is visible. The Object Permissions section lists permissions for the Account object:

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"/>

The Field Permissions section lists permissions for Account fields:

Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>

By following these steps, you have effectively granted delete access to one user while keeping it restricted for the other user. The user with the Permission Set will be able to delete

Account records, while the user without the Permission Set will only have Create, Read, and Edit access but won't have the ability to delete records.

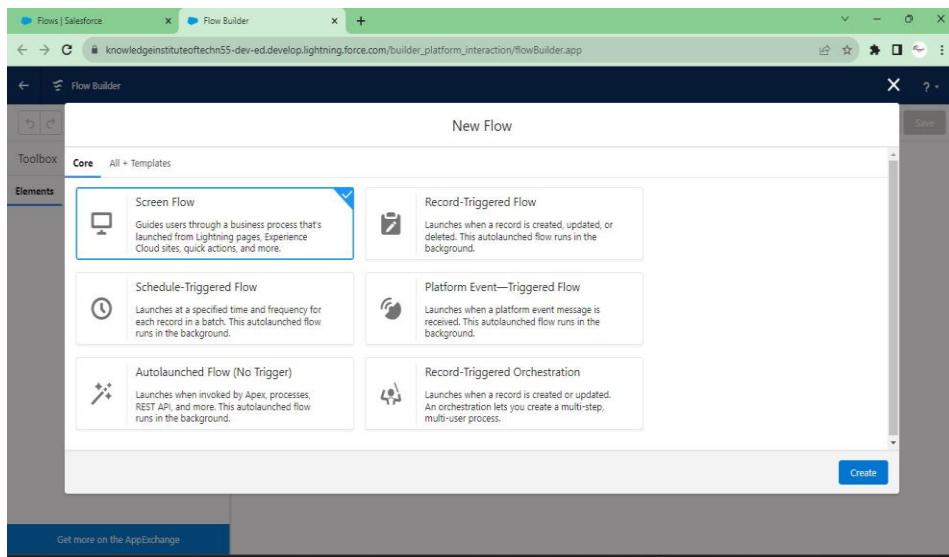
4.Create a screen flow for a basic survey to fill in the details for any form.

Step 1: Access Salesforce Setup

1. Open your Salesforce account and log in.
2. Select the gear icon or your profile photo in the top-right corner.
3. From the dropdown menu, choose "Setup".

Step 2: Create a flow

1. In the Quick Find box of the Setup menu, type "Flows" and choose "Flows."

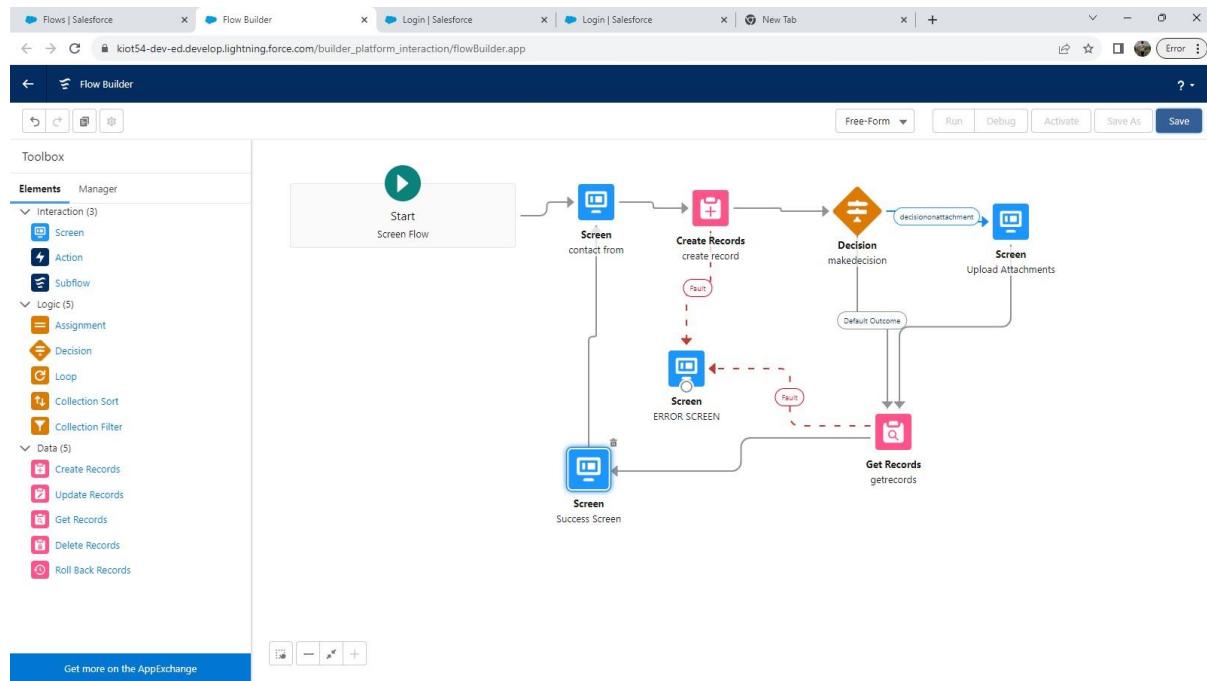


Step 3 : Add Screen Elements

1. Move a "Screen" component into position on the canvas. This will be where your flow will begin.
2. To configure an element of the screen, click on it.
3. Include language and instructions on this screen to explain the survey and what data are needed.

4. To allow visitors to enter survey information, drag and drop the necessary input components (such as text fields, radio buttons, and checkboxes) onto the page. These components can be found in the left-hand palette.

5. If required, add the proper labels, explanatory text, and validation rules to each input element.



Step 4: construct Variables

1. You must construct variables to hold the survey data if you wish to collect and save it. Create variables for each field on the screen by selecting the "Manager" tab in the palette. Verify that the data types of the related fields and the variable types are the same.

Harish S | Contact | Salesforce | Home | Salesforce | CONTACT FROM | Login | Salesforce | Login | Salesforce | New Tab | + | - | X | Run Again

kiot54-dev-ed--c.develop.vf.force.com/flow/CONTACT_FROM/3015j000001HXSVA?flow_debug=true

CONTACT FROM

first name: HARISH

*last name: S

*Email: harish0733962@gmail.com

Phone: 6379523138

Attachments?

Next

Debug Details

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

SCREEN: Success Screen
Display Text: conDis
Value at run time:
HUARRY! YOUR RECORD SUCCESSFULLY CREATED

Selected Navigation Button: PREVIOUS

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

SCREEN: Upload Attachments
Lightning Component: uploadfiles
Screen component: forceContent:fileUpload
Inputs:
label = (Upload Attachments)
recordId = (conid)
Outputs:
null

Selected Navigation Button: PREVIOUS

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

Log in | Sales | Flows | CONTACT | CONTACT | Log in | Sales | Recently | All | Books | Log in | Sales | Create M | Paragraph | + | - | X | Run Again

kiot54-dev-ed--c.develop.vf.force.com/flow/CONTACT_FROM/3015j000001HXSVA4

HUARRY! YOUR RECORD SUCCESSFULLY CREATED

Previous **Next**

The screenshot shows the Salesforce Setup interface with the 'Flows' page selected. The left sidebar has 'Flow' selected under 'Apps'. The main area displays a table of flow definitions:

Flow Label	Process Type	Active	Template	Package State
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Book Appointment from invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
CMS: Check Whether Any Step is Completed	Evaluation Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
CMS: Notify Content Author	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
CMS: Review Content	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
CMS: Submit Content for Review	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
CMS: Withdraw Review Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
CONTACT FROM	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Create Order Summary Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Create Process Exception Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed

The screenshot shows the Salesforce Setup interface with the 'Flows' page selected. The left sidebar has 'Flow' selected under 'Apps'. The main area displays a table of flow definitions, with 'CONTACT FROM' highlighted in blue:

Flow Label	Process Type	Active	Template	Package State
CMS: Notify Content Author	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
CMS: Review Content	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
CMS: Submit Content for Review	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
CMS: Withdraw Review Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
CONTACT FROM	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Create Order Summary Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Create Process Exception Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Create Waitlist	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Discount Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Even Exchange Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Find Contact Associated with Messaging Session	Individual-Object Linking Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Generate Appointment Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Inbound Cancel Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Inbound Modify Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed
Inbound New Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed

Step 7: Create a Finish Screen

Add a final screen where you can thank the user for completing the survey and provide any necessary information or instructions.

Step 8: Connect the Screens

Connect the screens and elements in the desired order by dragging connectors between them.

Step 9: Set the Flow Properties

Click on the canvas and go to the Properties tab on the right to set the flow's name, description, and other settings.

Step 10: Activate the Flow

After designing the flow, click "Save" and then "Activate" to make it available for users.