

Naan Mudhalvan
Salesforce Developer(Course)
Assignment no 1

Name : Abi K

Naan Mudhalvan id : au611420205001

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

Solution:

Step 1: Create Custom Objects

Assuming you have two custom objects, let's call them "College_C" and "C Department_C". If you haven't already created these objects, you can do so by going to Setup > Object Manager > Create > Custom Object.

Second custom objects, let's call them
"Department_C"

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A message at the top indicates that permissions for the new object are disabled by default. The 'Custom Object Definition Edit' screen is displayed, with the 'Label' field set to 'department' and the 'Plural Label' field set to 'departments'. The 'Object Name' field also contains 'department'. Other settings include a description, context-sensitive help (set to open the standard Salesforce Help & Training window), and optional features like reports and activities disabled. The 'Object Classification' section shows the object is classified as an Enterprise Application object due to checked checkboxes for sharing, Bulk API access, and Streaming API access. Deployment status is set to 'Deployed'. The 'Object Creation Options' section has checkboxes for adding notes and attachments, and launching the custom tab wizard after saving.

Step 2: Create a Master-Detail Relationship

To create a Master-Detail relationship between these two custom objects, follow these steps:

1. Go to Setup > Object Manager.
2. Click on "College__c" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."

- 4.Click the "New" button to create a new custom field.
- 5.Choose "Master-Detail Relationship" as the data type.
- 6.Enter a label for the relationship, e.g., "Department __c."
- 7.Choose " Department__c" as the related object.
- 8.Configure other settings as needed and click "Next."
- 9.Specify the field-level security and add it to relevant page layouts.
- 10.Click "Next" and "Save" to create the relationship.

The screenshot shows the Salesforce Setup interface with the following details:

Object Manager: CDepartment

Details tab selected.

Fields & Relationships section:

- Description
- API Name: CDepartment__c
- Custom: ✓
- Singular Label: CDepartment
- Plural Label: CDepartments

Enable Reports, **Track Activities**, **Track Field History**, **Deployment Status** (Deployed), **Help Settings**, and **Standard salesforce.com Help Window** are listed.

Edit and **Delete** buttons are at the top right.

The screenshot shows the Salesforce Setup interface with the following details:

Object Manager: CDepartment

Fields & Relationships tab selected.

New Relationship step 3 of 6: Enter the label and name for the lookup field.

Field Label: college

Field Name: college

Description: (empty)

Help Text: (empty)

Child Relationship Name: CDepartments

Sharing Setting:
Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: Child records can be reparented to other parent records after they are created.

Auto add to custom report type: Add this field to existing custom report types that contain this entity.

Lookup Filter button is at the bottom.

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "CDepartment New Relationship" and is on "Step 2. Choose the related object". It asks to select the other object related to CDepartment, with "college" selected in the dropdown. Navigation buttons for Previous, Next, and Cancel are visible.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup categories. The main area is titled "CDepartment New Custom Field" and is on "Step 1. Choose the field type". It asks to specify the type of information for the custom field, with "Roll Up Summary" selected. A detailed description of the "Roll Up Summary" type is provided, mentioning it creates a relationship to another object and allows users to click on a lookup icon to select a value from a popup list. Navigation buttons for Next and Cancel are visible.

Step 3: Create the Roll-Up Summary Field

Now, let's create a Roll-Up Summary Field on the "College_C" to calculate the totalnumber of related records in "Department_C":

1. Still on the "College_C" settings, go to "Fields & Relationships."

- 2. Click the "New" button to create a new custom field.**
- 3. Choose "Roll-Up Summary" as the data type.**
- 4. Enter a label for the field, e.g.,**
- 5. Choose "Count" as the Roll-Up Type.**
- 6. Select "Department__c" as the object to roll up information from.**
- 7. Specify the filter criteria if you want to filter the related records.**
- 8. Configure other settings as needed and click "Next."**
- 9. Specify the field-level security and add it to relevant page layouts.**
- 10. Click "Next" and "Save" to create the Roll-Up Summary Field.**

The screenshot shows the Salesforce Object Manager interface for the 'CDepartment' object. The 'Fields & Relationships' tab is selected. A table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college	college__c	Master-Detail(college)		✓
Created By	CreatedById	Lookup(User)		
Department Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. On the left, a sidebar lists 'User Interface' options like 'Rename Tabs and Labels' and 'Tabs'. A message at the top says, 'Didnt find what you're looking for? Try using Global Search.' Below this, there are four main sections: 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs', each with a 'New' button and a 'What Is This?' link. Under 'Custom Object Tabs', there is a table showing three tabs: 'Book1' (Box style), 'Research Proposal' (Square style), and 'student' (Box style). The 'Web Tabs' section notes 'No Web Tabs have been defined'. The 'Visualforce Tabs' section notes 'No Visualforce Tabs have been defined'. The 'Lightning Component Tabs' and 'Lightning Page Tabs' sections both note 'No Lightning component tabs have been defined'.

The screenshot shows the Salesforce Object Manager interface for creating a new custom field named 'college'. The top navigation bar includes 'Setup > OBJECT MANAGER', 'Home', and 'Object Manager'. The left sidebar lists various object management categories such as 'Page Layouts', 'Buttons, Links, and Actions', 'Compact Layouts', etc. The main content area shows the 'New Custom Field' page for the 'college' object. The 'Fields & Relationships' tab is selected. The page title is 'college New Custom Field'. It is Step 5 of 5, titled 'Step 5. Add to page layouts'. The field details shown are: Field Label: 'Total count', Date Type: 'Roll-Up Summary', Field Name: 'Total_count', and 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.' Below this, there is a checkbox for 'Add Field' and a dropdown for 'Page Layout Name' containing 'college Layout'. At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

The screenshot shows the Salesforce Object Manager interface for creating a new custom field named "Total count" on the "college" object. The field is defined as a Roll-Up Summary type with the internal name "Total_count". The "Field-Level Security for Profile" section lists various user profiles with checkboxes for "Visible" and "Read Only" permissions. Most profiles have both checkboxes checked.

Field Label	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"/>
Contact 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 - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce Object Manager interface for defining the summary calculation for the "Total count" field. The "Master Object" is set to "college" and the "Summarized Object" is set to "CDepartments". The "Select Roll-Up Type" section has "COUNT" selected. The "Filter Criteria" section has "All records should be included in the calculation" selected. Navigation buttons for "Previous", "Next", and "Cancel" are visible at the bottom right.

New Custom Field

Step 2. Enter the details

Field Label: [?](#)

Field Name: [?](#)

Description:

Help Text:

Auto add to custom report type: Add this field to existing custom report types that contain this entity [?](#)

Step 2 of 5

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

New Custom Field

Step 1. Choose the field type

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.

External Lookup Relationship 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.

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

Step 1

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'college'. Below the navigation is a breadcrumb trail: 'SETUP > OBJECT MANAGER college'. On the left, a sidebar lists various configuration options: 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, and Validation Rules. The main content area is titled 'Fields & Relationships' and shows a table with four items. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User;Group)		✓

Step 4: Create a Lightning App

- 1. Type and select "App Manager."**
- 2. Click "New Lightning App."**
- 3. Fill in basic information (Name, Developer Name, Description).**
- 4. Choose the App Type (Standard, Console, Custom).**
- 5. Customize the Logo and Colour Scheme.**
- 6. Configure Navigation Items (objects to appear in the app's menu).**
- 7. Set the App Visibility (default access).**
- 8. Optionally, choose Record Pages (Lightning Record Pages).**
- 9. Review and Save the app.**

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main title is 'New Custom Object Tab'. The sub-step is 'Step 2. Add to Profiles'. A note says: 'Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.' There are two radio button options: 'Apply one tab visibility to all profiles [Default On]' (selected) and 'Apply a different tab visibility for each profile'. To the right, there's a 'Tab Visibility' column where each profile listed has a dropdown menu set to 'Default On'. The profiles listed include: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Cloud Kicks Admin, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, customer, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, Customer Portal Manager Custom, Customer Portal Manager Standard, External Apps Login User, External Identity User, Force.com - App Subscription User, Force.com - Free User, Gold Partner User, High Volume Customer Portal, High Volume Customer Portal User, Identity User, Manager, Marketing User, Minimum Access - Salesforce, Partner App Subscription User, Partner Community Login User, Partner Community User, Read Only, Research Manager, Research Users, Salesforce API Only System Integrations, Sales User, security profile, Silver Partner User, Solution Manager, Standard Platform User, Standard User, and System Administrator. At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main content area is titled 'New Custom Object Tab' and is divided into three steps. Step 1, 'Enter the Details', is currently active. It allows users to choose a custom object ('Object' dropdown set to 'college') and a tab style ('Tab Style' dropdown set to 'Jewel'). A note indicates that users can choose a 'Splash Page Custom Link' to show as a splash page when users click on the tab. Step 2, 'Customize the Tab', is visible below. Step 3, 'Add to Custom Apps', is also visible. The top navigation bar includes links for Home, Object Manager, and various system icons.

The screenshot shows the 'Step 3: Add to Custom Apps' page. It lists various standard and custom apps available for adding to the new custom tab. Each app has a checkbox labeled 'Include Tab'. Most checkboxes are checked. A note at the bottom states: 'Append tab to users' existing personal customizations'. The top navigation bar includes links for Home, Object Manager, and various system icons.

Custom App	Include Tab
Platform (standard_Platform)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>
Content (standard_Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>
Sales (standard_LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard_QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard_DataManager)	<input checked="" type="checkbox"/>
Bolt Solutions (standard_LightningBolt)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Select an existing custom object or [create a new custom object now](#).

Object	CDepartment
Tab Style	Lightning

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link	-None-
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Enter a short description

Description

Next Cancel

Lightning Experience App Manager

20 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified Date	App ...	Visi...
All Tabs	AllTabSet		14/07/2023, 10:47 am	Classic	▼
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14/07/2023, 10:47 am	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	14/07/2023, 10:47 am	Classic	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	14/07/2023, 10:47 am	Lightning	✓
Community	Community	Salesforce CRM Communities	14/07/2023, 10:47 am	Classic	✓
Content	Content	Salesforce CRM Content	14/07/2023, 10:47 am	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	14/07/2023, 10:47 am	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	14/07/2023, 10:47 am	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	14/07/2023, 10:47 am	Lightning	✓
Marketing	Marketing	Best-in-class on-demand marketing automation	14/07/2023, 10:47 am	Classic	✓
Platform	Platform	The fundamental Lightning Platform	14/07/2023, 10:47 am	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	14/07/2023, 10:47 am	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	14/07/2023, 10:47 am	Classic	✓
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	14/07/2023, 10:47 am	Lightning	✓
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	14/07/2023, 10:47 am	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	14/07/2023, 10:47 am	Classic	✓

New Lightning App New Connected App

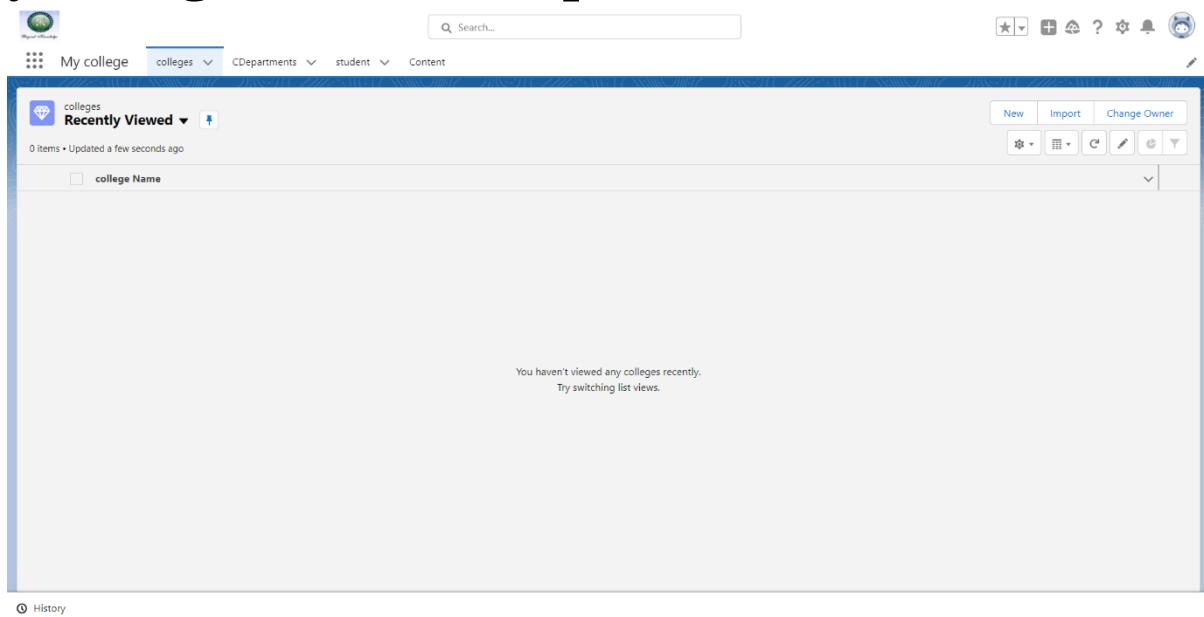
The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'User Interface' and 'Rename Tabs and Labels'. The main content area is titled 'Custom Tabs' and contains a table for 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. It lists tabs like 'Book1' (Box), 'Departments' (Lightning), 'colleges' (Jewel), 'Research_Proposal' (Square), and 'student' (Box). Below this are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each stating 'No [Tab Type] have been defined'.

The screenshot shows the Salesforce Setup interface with the 'New Lightning App' page selected. The left sidebar has a search bar and navigation links for 'Salesforce', 'Data', 'Apps', 'Components', 'Lightning', 'Mobile', and 'Setup'. The main content area is titled 'App Details & Branding' and includes fields for 'App Name' (My college), 'Developer Name' (My_college), and 'Description' (Enter a description...). It also features 'App Branding' with an image of a green circular logo with a graduation cap and the text 'Beyond Knowledge', and a color picker for 'Primary Color Hex Value' (#217AC7). A checkbox 'Use the app's image and color instead of the org's custom theme' is checked. The bottom of the screen shows the Salesforce footer with links for 'Salesforce Offline', '14 Sales', 'LightningSales', 'Manage your sales process with accounts, leads, opportunities, and more', '14/07/2023, 10:47 am', 'Lightning', and a dropdown menu.

Conclusion:

Now, whenever you create or update a record in the "Department__c" related to a "College__c," the "TotalCount__c" field on the "College__c" will automatically update to show the total number of related records.

Remember to adjust field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your organization's requirements.



app-d-dev-ed.develop.lightning.force.com/lightning/o/college_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=16961390...

My college colleges CDdepartments student Content

New college

* = Required Information

Information

Owner krishna s

college Name kiot

phone 9087116402

Email kiot@ac.in

Location

Latitude 90

Longitude 80

Cancel Save & New Save

History

Recently Viewed

My college colleges CDdepartments student Content

CDdepartments Recently Viewed

1 item • Updated a few seconds ago

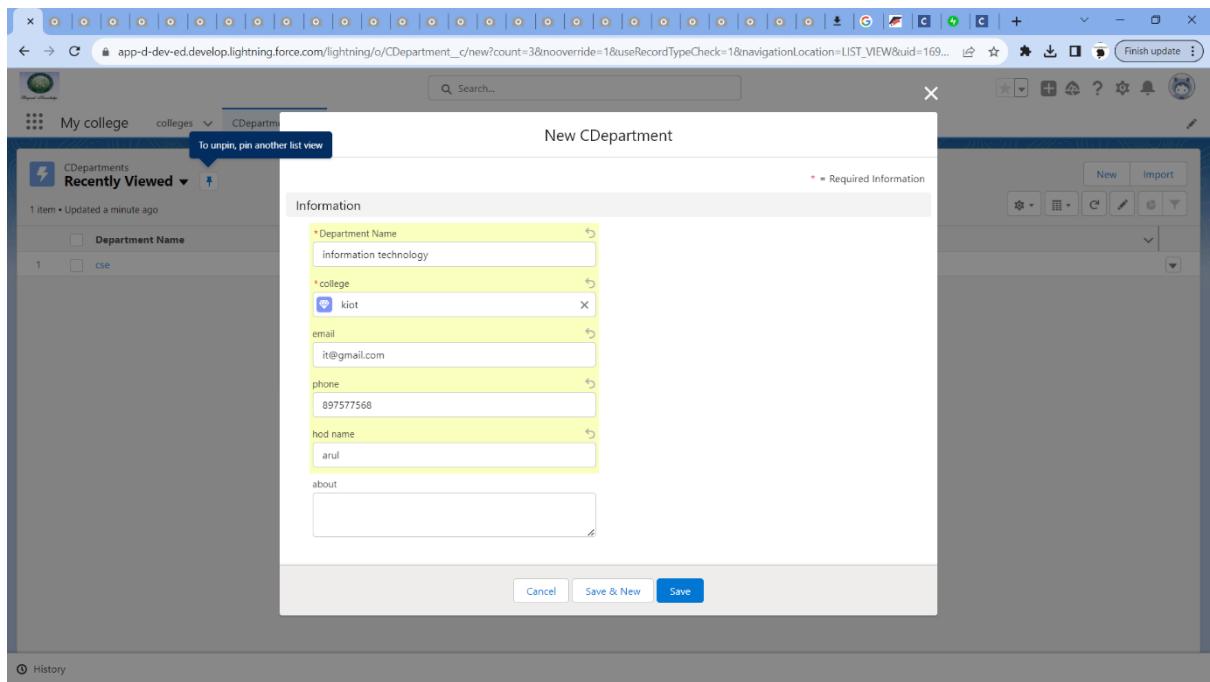
Department Name

cse

New Import

History

Recently Viewed



My college colleges CDepartments student Content

CDepartment information technology

New Contact Edit New Opportunity

Related Details

Department Name
information technology

college
kiot

email
it@gmail.com

phone
897577568

hod name
arul

about

Created By krishna s. 01/10/2023, 11:19 am

Last Modified By krishna s. 01/10/2023, 11:19 am

History

My college colleges CDepartments student Content

college kiot

New Contact Edit New Opportunity

Related Details

college Name
kiot

Total count
1

phone
9087116402

Email
kiot@gmail.com

Location
90.80

Created By krishna s. 01/10/2023, 11:16 am

Last Modified By krishna s. 01/10/2023, 11:17 am

History

My college colleges CDepartments student Content

CDepartments Recently Viewed

1 item • Updated a few seconds ago

Department Name

cse

New Import

History

My college colleges Recently Viewed

1 item • Updated a few seconds ago

college Name

1 kiot

New Import Change Owner

grid view

History

My college colleges CDepartments student Content

kiot

New Contact Edit New Opportunity

Related Details

college Name: kiot

Total count: 2

phone: 9087116402

Email: kiot@gmail.com

Location: 90.80

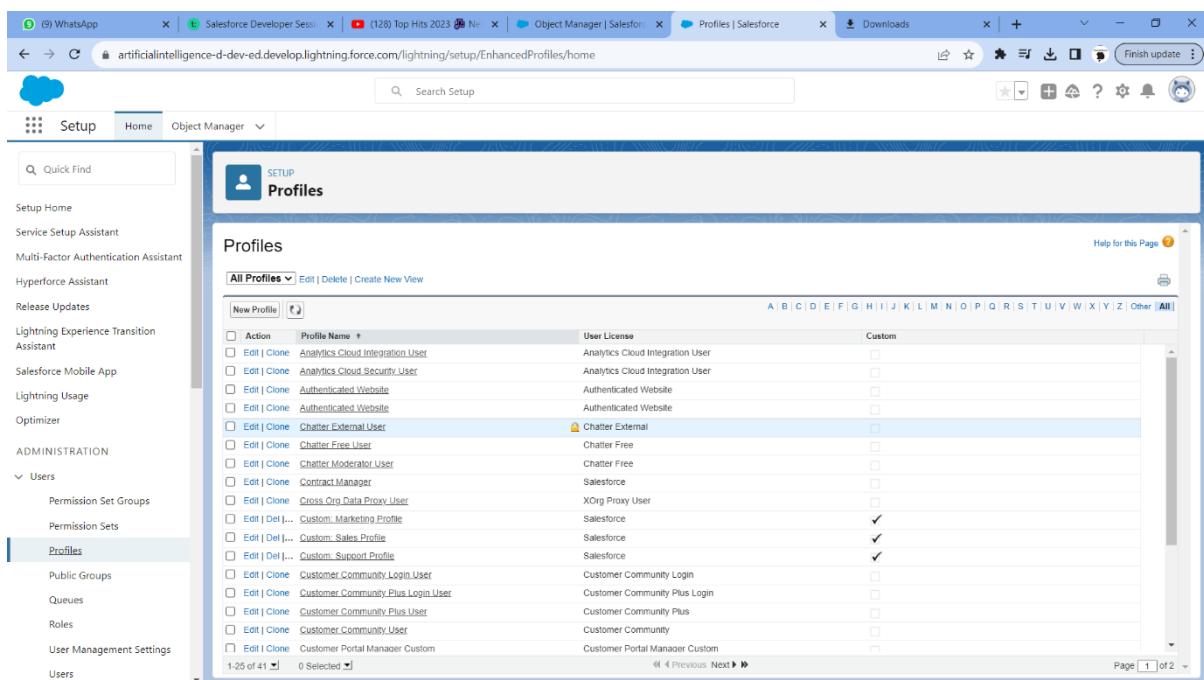
Created By: krishna.s. 01/10/2023, 11:16 am

Last Modified By: krishna.s. 01/10/2023, 11:19 am

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.

Solution:

Step 1: Create two separate custom profiles, one for User A and one for User B.



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main area displays a table of profiles, each with a checkbox, profile name, user license, and status. The table includes columns for Action, Profile Name, User License, and Status. The status column indicates if the profile is Custom or System. The table lists various profiles such as Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter External User, Chatter Free User, Chatter Moderator User, 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, and Customer Portal Manager Custom. The 'Chatter External' profile is highlighted with a blue selection bar. The left sidebar shows navigation links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lighting Usage, Optimizer, Administration, Users, and Profiles. The bottom right corner shows page navigation information: Page 1 of 2.

Screenshot of the Salesforce Setup interface showing the Profiles page.

The left sidebar shows the following navigation:

- Setup Home
- Service Setup Assistant
- Multi-Factor Authentication Assistant
- Hyperforce Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- ADMINISTRATION
 - Users
 - Permission Set Groups
 - Permission Sets
 - Profiles**
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
 - Users

The main content area displays the "Profiles" page with the following details:

Profiles

All Profiles | Edit | Delete | Create New View

New Profile |

Action	Profile Name *	User License	Custom
<input type="checkbox"/>	Edit Clone: Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	Edit Delete: salesmanager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone: Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone: Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone: Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone: Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone: System Administrator	Salesforce	<input type="checkbox"/>

A to Z: 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

1 of 7 | 0 Selected | Previous | Next | Page 1 of 1

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. * = Required Information

Existing Profile: Standard Platform User	User License: Salesforce Platform
Profile Name: <input type="text"/>	

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Profiles | Salesforce | Downloads | Finish update

Profiles

Clone Profile

You must select an existing profile to clone from.

Existing Profile: Standard Platform User
User License: Salesforce Platform
Profile Name: Manager

Save Cancel

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Profiles | Salesforce | Downloads | Finish update

Profiles

Manager

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	
Name	Manager
User License	Salesforce Platform
Description	
Created By	GOPAL_S_01/10/2023, 7:09 pm
Modified By	GOPAL_S_01/10/2023, 7:09 pm
Page Layouts	
Standard Object Layouts	
Global	Global Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Home Page Layout	Home Page Default [View Assignment]
Account	Account Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]
Asset	Asset Layout [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]
Order	Order Layout [View Assignment]
Order Product	Order Product Layout [View Assignment]
Payment	Payment Layout [View Assignment]
Payment Authorization	Payment Authorization Layout [View Assignment]
Payment Authorization Adjustment	Payment Authorization Adjustment Layout [View Assignment]
Payment Gateway	Payment Gateway Layout [View Assignment]

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** The URL is artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2Fe%3Fr?url%3D%252F00e5j0.... The title bar includes tabs for WhatsApp, Salesforce Developer Session, YouTube, Object Manager, Profiles, and Downloads.
- Left Navigation Bar:** Includes links for Setup Home, Object Manager, Quick Find, and various administrative sections like Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users.
- Current Screen:** The main area is titled "SETUP Profiles Manager". It displays a "Profile Edit" form for the "Manager" profile. The "Name" field is set to "Manager", "User License" is "Salesforce Platform", and "Description" is empty. A "Custom Profile" checkbox is checked. Below this, the "Custom App Settings" section lists several apps with checkboxes for "Visible" and "Default". The "kiot (kiot)" app has its "Visible" checkbox checked. The "Service Provider Access" section contains a "Tab Settings" section with a checkbox for "Overwrite users' personal tab customizations". Under "Standard Tab Settings", the "Home" tab is "Default On" for Accounts, and "Alert Settings" is "Default On".

The screenshot shows the Salesforce Setup Profiles page. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, and Users.

The main content area has a header titled "SETUP Profiles". It contains sections for "Communication Subscription Channel Types", "Custom Object Permissions", and "Session Settings".

Communication Subscription Channel Types:

	Individuals	Locations	Party Consents	Push Topics	Sellers	Streaming Channels	User External Credentials
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions:

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Bank	<input type="checkbox"/>					
customers	<input type="checkbox"/>					

Session Settings:

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies:

User passwords expire in:	90 days
Enforce password history:	3 passwords remembered
Minimum password length:	8

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Profiles

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration
Contact Point Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>				
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>				

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Profiles

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration
Bank	<input checked="" type="checkbox"/>				
customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Enhancement Requests	<input type="checkbox"/>				

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Profiles

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration
Bank	<input type="checkbox"/>				
customers	<input type="checkbox"/>				
Enhancement Requests	<input type="checkbox"/>				

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Profiles

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration
Contact Point Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>				
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>				

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Profiles

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration
Bank	<input type="checkbox"/>				
customers	<input type="checkbox"/>				
Enhancement Requests	<input type="checkbox"/>				

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Profiles

Custom Object Permissions

	Bank	customers	Enhancement Requests			
	Read	Create	Edit	Delete	View All	Modify All
Bank	<input checked="" type="checkbox"/>					
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Enhancement Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in:	90 days
Enforce password history:	3 passwords remembered
Minimum password length:	8
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
Obfuscate secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users | Edit | Create | New | View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adriana_Diva	dadan	test_diva_nas_4e0b0f0wtk_ts2grgktxpx_3nj0fof0yzewns_h43tkzw6meia@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMS User
<input type="checkbox"/> Edit	Chatter Export	Chatter	chatty_000d5000000crskkeapn_ko0hkmponis@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Ellington_Amelia	aelli	amelia.ellington.1.46kxxc0poohh_6cyedcuodwh_hnbdlwmvvhtho_wguctor1dah@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S_GOPAN	GS	kot120@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@000d500000crskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@000d500000crskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Developer Session | Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: [] Role: <None Specified>

Last Name: [] User License: Salesforce Integration

Aliases: [] Profile: Salesforce API Only System Integrations

Email: [] Active:

Username: [] Marketing User:

Nickname: [] Offline User:

Title: [] Knowledge User:

Company: [] Flow User:

Department: [] Service Cloud User:

Division: [] Site.com Contributor User:

Data.com User Type: [] Site.com Publisher User:

Data.com Monthly Addition Limit: Default Limit (300) WDC User:

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage Optimizer

ADMINISTRATION

Users

Permission Set Groups

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data Email

PLATFORM TOOLS

Apps

Salesforce Developer Session | Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmya Role: <None Specified>

Last Name: bala User License: Salesforce Platform

Aliases: sbalala Profile: Manager

Email: 2k20cse179@kiot.ac.in Active:

Username: 2k21t@kiot.ac.in Marketing User:

Nickname: User169616771282564526 Offline User:

Title: worker Knowledge User:

Company: kiot bank Flow User:

Department:

Division:

Data.com User Type: [] Service Cloud User:

Data.com Monthly Addition Limit: Default Limit (300) Site.com Contributor User:

Accessibility Mode (Classic Only): Site.com Publisher User:

High-Contrast Palette on Charts: WDC User:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage Optimizer

ADMINISTRATION

Users

Permission Set Groups

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Public Groups

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Roles

User Management Settings

Users

Data Email

PLATFORM TOOLS

Apps

The screenshot shows the Salesforce Setup interface for managing users. On the left, a sidebar lists various setup categories like Hyperforce Assistant, Lightning Experience Transition Assistant, and Administration. Under Administration, the 'Users' section is selected, showing sub-options for Data, Email, and Apps. The main content area displays the 'User Detail' for a user named 'SOWMYA bala'. The user's name is listed as 'sowmya bala' with an alias 'stala'. The email address is '2k21it@kiot.ac.in'. The user has a nickname 'User16961677128256452616' and a title 'worker'. The company is 'kiot bank'. The user is assigned to the 'Manager' profile, which is checked as active. Other profiles listed include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations (checked), Data.com User Type (checked), Accessibility Mode (Classic Only) (unchecked), Debug Mode (unchecked), High-Contrast Palette on Charts (unchecked), Load Lightning Pages While Scrolling (checked), and Salesforce CRM Content User (checked). The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)', locale is 'English (India)', and language is 'English'. The user is a Delegated Approver for Manager. The 'Receive Approval Request Emails' setting is 'Only if I am an approver'. Federation ID, App Registration: One-Time Password Authenticator, and App Registration: Salesforce Authenticator fields are also present.

The screenshot shows a Gmail inbox with 5,318 messages. A new message from 'support@salesforce.com' is highlighted, addressed to the user. The subject of the email is 'Welcome to Salesforce!'. The body of the email contains a 'Verify Account' button, a URL 'https://artificialintelligence-d-dev-ed.develop.my.salesforce.com', and a note that the user can log in later using the provided URL. It also mentions the user's username '2k21it@kiot.ac.in' and a welcome message. The footer of the email includes a copyright notice for Salesforce.

(9) WhatsApp x | (1) Salesforce Dev x | (128) Top Hit x | Object Manag x | Users | Sales x | Downloads x | Welcome to x | Recently Viewed x | Change Your x + - _ Finish update

artificialintelligence-d-dev-ed.develop.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupId=Ch...

salesforce

Change Your Password

Enter a new password for 2k21it@kiot.ac.in. Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password Good

* Confirm New Password Match

Security Question In what city were you born?

* Answer salem

Change Password

Password was last changed on 01/10/2023, 7:13 pm.

Login | Salesforce x +

artificialintelligence-d-dev-ed.develop.my.salesforce.com

Incognito Finish update

salesforce

Username 2k21it@kiot.ac.in

Password

Log In

Remember me

[Forgot Your Password?](#)

Join us for the future of trusted enterprise AI, streaming on Salesforce+.

WATCH ON DEMAND

AI Day

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Recently Viewed | Bank | Salesfo... x +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/list?filterName=Recent

kiot Bank customers Home

Search... Recently Viewed ▾

0 items • Sorted by Bank Name • Updated a few seconds ago

Bank Name ↓

You haven't viewed any Bank recently.
Try switching list views.

sowmiya bala artificialintelligence-d-dev-ed.develop.my.salesforce.com

Settings Log Out

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic ⓘ

Add Username

New Bank | Salesforce x +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=16...

kiot Bank customers Home

Search... Recently Viewed ▾

0 items • Updated a few seconds ago

Bank Name

New Bank

* = Required Information

Information
<p>Bank Name: boi</p> <p>Owner: sowmiya bala</p> <p>phoneno: 0897754534</p>

Cancel Save & New Save

New customer | Salesforce

Recently Viewed

0 items • Sorted by customer Name • Updated a few seconds ago

customer Name ↓

New customer

* = Required Information

Information

* customer Name: madhu

* Bank: boi

Cancel Save & New Save

List View

madhu | customer | Salesforce

customer madhu was created.

Related Details

customer Name: madhu

Bank: boi

Created By: sowmiya bala, 01/10/2023, 7:17 pm

Last Modified By: sowmiya bala, 01/10/2023, 7:17 pm

New Contact Edit Delete

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Profiles | Salesforce | Welcome to Salesforce: Verify... | + | Finish update

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION ▾ Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Edit Clone: Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	Edit Delete: salesmanager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone: Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone: Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone: Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone: Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone: System Administrator	Salesforce	<input type="checkbox"/>

1.7 of 7 | 0 Selected | Page 1 of 1

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION ▾ Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard Platform User
User License: Salesforce Platform
Profile Name: salesmanager

Save Cancel

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify...

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings Users

Profile salesmanage

Profile Detail Name: salesmanage User License: Salesforce Platform Description: Created By: GOPALS_01/10/2023, 7:19 pm Modified By: GOPALS_01/10/2023, 7:19 pm

Page Layouts Standard Object Layouts Global Email Application Home Page Layout Account Alternative Payment Method Appointment Invitation Asset Global Layout [View Assignment] Not Assigned [View Assignment] Home Page Default [View Assignment] Account Layout [View Assignment] Alternative Payment Method Layout [View Assignment] Appointment Invitation Layout [View Assignment] Asset Layout [View Assignment]

Operating Hours Order Order Product Payment Payment Authorization Payment Authorization Adjustment Payment Gateway

Operating Hours Layout [View Assignment] Order Layout [View Assignment] Order Product Layout [View Assignment] Payment Layout [View Assignment] Payment Authorization Layout [View Assignment] Payment Authorization Adjustment Layout [View Assignment] Payment Gateway Layout [View Assignment]

Help for this Page

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify...

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings Users

Profile Edit salesmanage

Profile Edit Name: salesmanage User License: Salesforce Platform Description:

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
kiot (kiot)	<input checked="" type="checkbox"/>	<input type="radio"/>			

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings Home Default On Learning Default On

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION ▾ Users Permission Set Groups Profiles Public Groups Queues Roles User Management Settings Users

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	Basic Access	Create	Edit	Data Administration
	Read	View All	Modify All			Read	View All	Modify All	
Contact Point Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in:	90 days
Enforce password history:	3 passwords remembered
Minimum password length:	8
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
Obfuscate secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION ▾ Users Permission Set Groups Profiles Public Groups Queues Roles User Management Settings Users

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	Basic Access	Create	Edit	Data Administration
	Read	View All	Modify All			Read	View All	Modify All	
Contact Point Emails	<input checked="" type="checkbox"/>								
User External Credentials	<input type="checkbox"/>								
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enhancement Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in:	90 days
Enforce password history:	3 passwords remembered
Minimum password length:	8
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
Obfuscate secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

Save Save & New Cancel

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Page | Users | Salesforce | Welcome to Salesforce: Verify your...

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit Save Save & New Cancel

General Information

First Name: Last Name: Role: <None Specified>

Aliases: User License: Salesforce Integration

Email: Profile: Salesforce API Only System Integrations

Username: Active:

Nickname: Marketing User:

Title: Offline User:

Company: Knowledge User:

Department: Flow User:

Division: Service Cloud User:

Data.com User Type: Site.com Contributor User:

Data.com Monthly Addition Limit: Default Limit (300)

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Page | Users | Salesforce | Welcome to Salesforce: Verify your...

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit Save Save & New Cancel

General Information

First Name: madhu Last Name: Role: <None Specified>

Aliases: mb User License: Sales Platform

Email: 2k20cse179@kiot.ac.in Profile: salesmanage

Username: 2k20cse179@kiot.ac.in Active:

Nickname: User169616842428854192 Marketing User:

Title: worker Offline User:

Company: kiot bank Knowledge User:

Department: Sales Flow User:

Division: Service Cloud User:

Data.com User Type: Site.com Contributor User:

Data.com Monthly Addition Limit: Default Limit (300)

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify yo... | + | Finish update

The screenshot shows the Salesforce Setup interface with the 'User Management Settings' tab selected under 'User'. A new user record is being created. The 'Mailing Address' section contains empty input fields for Street, City, Zip/Postal Code, State/Province, and County. The 'Single Sign On Information' section has an empty 'Federation ID' field. The 'Locale Settings' section shows the time zone as '(GMT+05:30) India Standard Time (Asia/Kolkata)', locale as 'English (India)', and language as 'English'. The 'Approver Settings' section includes fields for 'Delegated Approver' and 'Manager', both currently empty. A dropdown menu for 'Receive Approval Request Emails' is set to 'Only if I am an approver'. A checked checkbox indicates 'Generate new password and notify user immediately'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify yo... | + | Finish update

This screenshot shows the same Salesforce Setup interface as the first one, but with specific address details filled in for the new user. In the 'Mailing Address' section, the 'Street' field contains '4/164, anyampalayam, uthamasalapuram...', 'City' is 'SALEM', 'Zip/Postal Code' is '636308', 'State/Province' is 'TAMIL NADU', and 'Country' is empty. The rest of the page, including the 'Single Sign On Information', 'Locale Settings', 'Approver Settings', and save buttons, are identical to the first screenshot.

Screenshot showing the Salesforce Developer Session 2 interface and a Gmail inbox.

Salesforce Developer Session 2:

- Tab: WhatsApp
- Tab: Salesforce Developer Session 2
- Tab: (128) Top Hits 2023
- Tab: New Po...
- Tab: Users | Salesforce
- Tab: Welcome to Salesforce: Verify yo...

The main window displays the Salesforce Setup interface under the "Users" section. A user named "madhu b" is selected. The "User Detail" tab is active, showing the following details:

Name	madhu b	Role	Marketing User
Alias	mb	User License	Active
Email	2k20csit79@kiot.ac.in [Verify]	Profile	SalesManager
Username	2k20csit@kiot.ac.in	Marketing User	<input checked="" type="checkbox"/>
Nickname	User16961684242855419206	Offline User	<input type="checkbox"/>
Title	worker	Knowledge User	<input type="checkbox"/>
Company	kiot bank	Flow User	<input type="checkbox"/>
Department	Sales	Service Cloud User	<input type="checkbox"/>
Division		Sites.com Contributor User	<input type="checkbox"/>
Address	41/94, ammalpalayam, uhamasolapuram .., Paraikkadu , salem- 636308	Sites.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input type="checkbox"/> View
Language	English	Data.com User Type	<input type="checkbox"/> Edit
Delegated Approver	Manager	Accessibility Mode (Classic Only)	<input type="checkbox"/> Edit
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> Edit
Action Link Templates	Federation ID	High-Contrast Palette on Charts	<input type="checkbox"/> Edit
Actions & Recommendations	App Registration: One-Time Password Authenticator	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> Edit

Gmail:

- Tab: WhatsApp
- Tab: Salesforce Developer Session 2
- Tab: (128) Top Hits 2023
- Tab: New Po...
- Tab: Users | Salesforce
- Tab: Welcome to Salesforce: Verify yo...

The Gmail inbox shows an email from Salesforce with the subject "Welcome to Salesforce!". The email content is:

Welcome to Salesforce!

Click below to verify your account.

[Verify Account](https://artificialintelligence-d-dev-ed-develop.my.salesforce.com)

To easily log in later, save this URL:
<https://artificialintelligence-d-dev-ed-develop.my.salesforce.com>

Again, welcome to Salesforce!

© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.
Salesforce.com, inc. The Landmark at One Market, Suite 300, San Francisco, CA, 94105, United States

Buttons: Reply, Forward

Change Your Password | Salesforce

artificialintelligence-d-dev-ed.develop.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupId=ChangePa... Incognito (3) Finish update



Change Your Password

Enter a new password for 2k20csit@kiot.ac.in. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
india

Change Password

Password was last changed on 01/10/2023, 7:24 pm.

Recently Viewed | Bank | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank_c/list?filterName=Recent Incognito (3) Finish update

Recently Viewed

0 items • Updated a few seconds ago

New

Bank Name

You haven't viewed any Bank recently.
Try switching list views.

List View

The screenshot displays two separate instances of the Salesforce Lightning Experience.

Top Window: The title bar shows "Recently Viewed | customers". The page header includes a search bar and navigation links for "kiot", "Bank", "customers", and "Home". A sidebar on the left lists "Recently Viewed" items under the "customers" category. The main content area displays a message: "You haven't viewed any customers recently. Try switching list views." Below this message, there is a "customer Name" input field and a dropdown menu.

Bottom Window: The title bar shows "artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home". The page header includes a search bar and navigation links for "Setup", "Home", and "Object Manager". A sidebar on the left shows a tree structure with categories like "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", and "User Interface". The main content area is titled "Permission Sets" and contains a table listing various permission sets. The table columns include "Action", "Permission Set Label", "Description", and "License".

Step 2:

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:

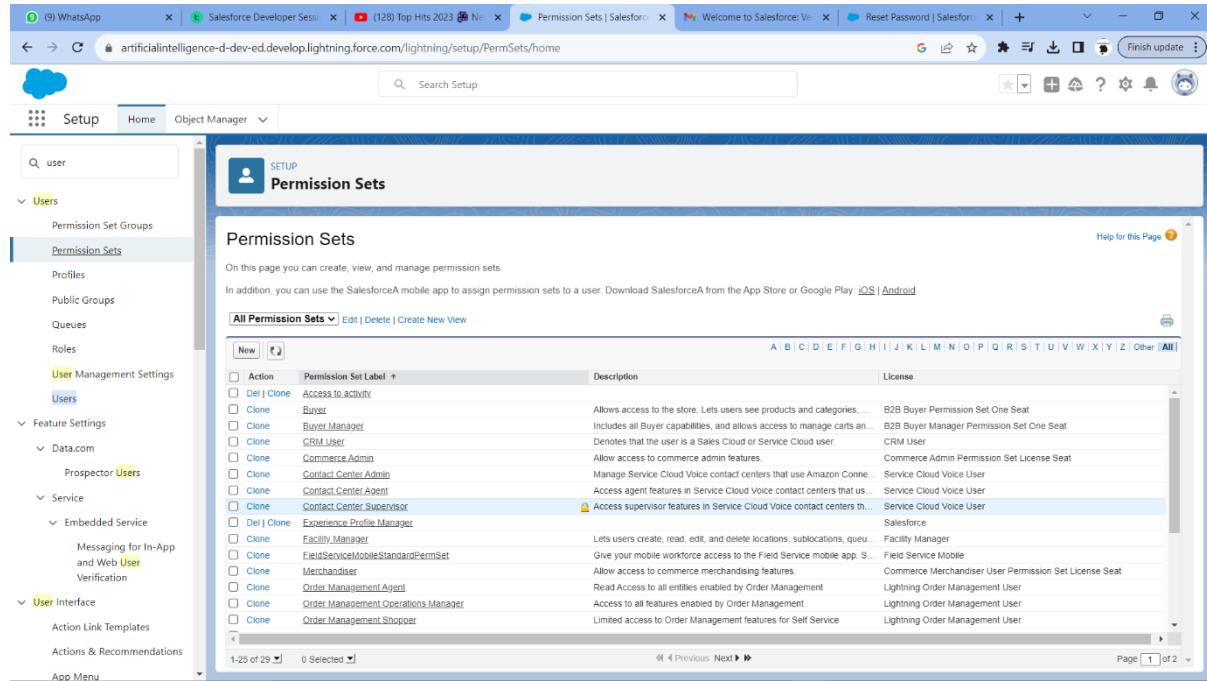
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

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.



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main content area displays a table of permission sets. The table columns are 'Action', 'Permission Set Label +', 'Description', and 'License'. The 'Description' column contains detailed explanations for 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 an...' for 'Buyer_Manager'. The 'License' column indicates which license is required for each set, such as 'B2B Buyer Permission Set One Seat' for 'Access_to_Activity'. The table is paginated at the bottom, showing '1-25 of 29' and '0 Selected'.

Action	Permission Set Label +	Description	License
<input type="checkbox"/>	Access_to_Activity	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer_Manager	CRM User
<input type="checkbox"/>	Clone	CRM_User	Commerce Admin
<input type="checkbox"/>	Clone	Commerce_Admin	Contact_Center_Admin
<input type="checkbox"/>	Clone	Contact_Center_Admin	Contact_Center_Agent
<input type="checkbox"/>	Clone	Contact_Center_Agent	Contact_Center_Supervisor
<input type="checkbox"/>	Clone	Contact_Center_Supervisor	Experience_Profile_Manager
<input type="checkbox"/>	Del Clone	Experience_Profile_Manager	Facility_Manager
<input type="checkbox"/>	Clone	Facility_Manager	FieldServiceMobileStandardPermSet
<input type="checkbox"/>	Clone	FieldServiceMobileStandardPermSet	Merchandiser
<input type="checkbox"/>	Clone	Merchandiser	Order_Management_Agent
<input type="checkbox"/>	Clone	Order_Management_Agent	Order_Management_Operations_Manager
<input type="checkbox"/>	Clone	Order_Management_Operations_Manager	Order_Management_Shopper
<input type="checkbox"/>	Clone	Order_Management_Shopper	

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

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Feature Settings

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Service

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Actions & Recommendations

App Menu

Permission Sets

Create

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

- Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License: --None--

Save Cancel

Help for this Page

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Search Setup

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App Menu

Permission Sets

Create

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

- Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License: --None--

Save Cancel

Help for this Page

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

Permission Set Overview:

Setting	Description	Value
API Name	salesmanager	
Namespace Prefix	GOPALS_	
Created By	GOPALS_	
Last Modified By	GOPALS_	
Session Activation Required	unchecked	

Apps:

- 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.

Object Settings:

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insights 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 Invitees	--	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	--

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

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Permission Set salesmanager

Find Settings | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings Bank

Bank

Tab Settings

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Bank Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>

Video Tutorial | Help for this Page

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

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Permission Set salesmanager

Find Settings | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings Bank

Bank

Tab Settings

Save | Cancel

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Object Permissions

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"/>

Field Permissions

Field Name	Read Access	Edit Access
Bank Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>

Video Tutorial | Help for this Page

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 42.0 | Reset Password | Salesforce

Setup Home Object Manager Search Setup

... > SETUP > PERMISSION SET 'SALESMANAGER'

salesmanager

Current Assignments

No assignments defined.

Search this list...

Full Name	All...	Username	Role	Action	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9odih.d6cwpdcuo4wh.hnbdwmvwhhq.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Force.com - App Subscription User
Chatter Expert	Chatter	chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Diya Adanna	dadian	test_diya_pas.4w8bjybi9wik.tszrgsbbkpx.3gi8ofovzwns.h43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UIMS User
GOPAL S	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Integration User	integ	integration@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	salesmanager
Security User	sec	insightssecurity@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
sowmiya bala	sbala	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager

Select Users to Assign

All Users

1 item selected

Search this list...

Full Name	All...	Username	Role	Action	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9odih.d6cwpdcuo4wh.hnbdwmvwhhq.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Force.com - App Subscription User

Next

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/OP55j000000BPhok/PermissionSetAssignment/new

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date (selected)

Specify the expiration date

Time Zone: Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
madhu b		salesmanager		Salesforce Platform	Never Expires

Cancel Back Assign

PERMISSION SET 'SALESMANA' 1 assignments were successful.

salesmanager

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
madhu b	Salesforce Platform			Success

Done

Search Setup

Setup Home Object Manager

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Recently Viewed | customers | [S](#) [+](#)

Recently Viewed | customers | [S](#) [+](#)

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer_c/list?filterName=Recent

Incognito (3) [Finish update](#)

kiot Bank customers Home

Search...

Recently Viewed ▾

customers

0 items • Updated a few seconds ago

customer Name

You haven't viewed any customers recently.
Try switching list views.

LIST VIEW CONTROLS

New

- New
- Clone
- Rename
- Sharing Settings
- Show List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

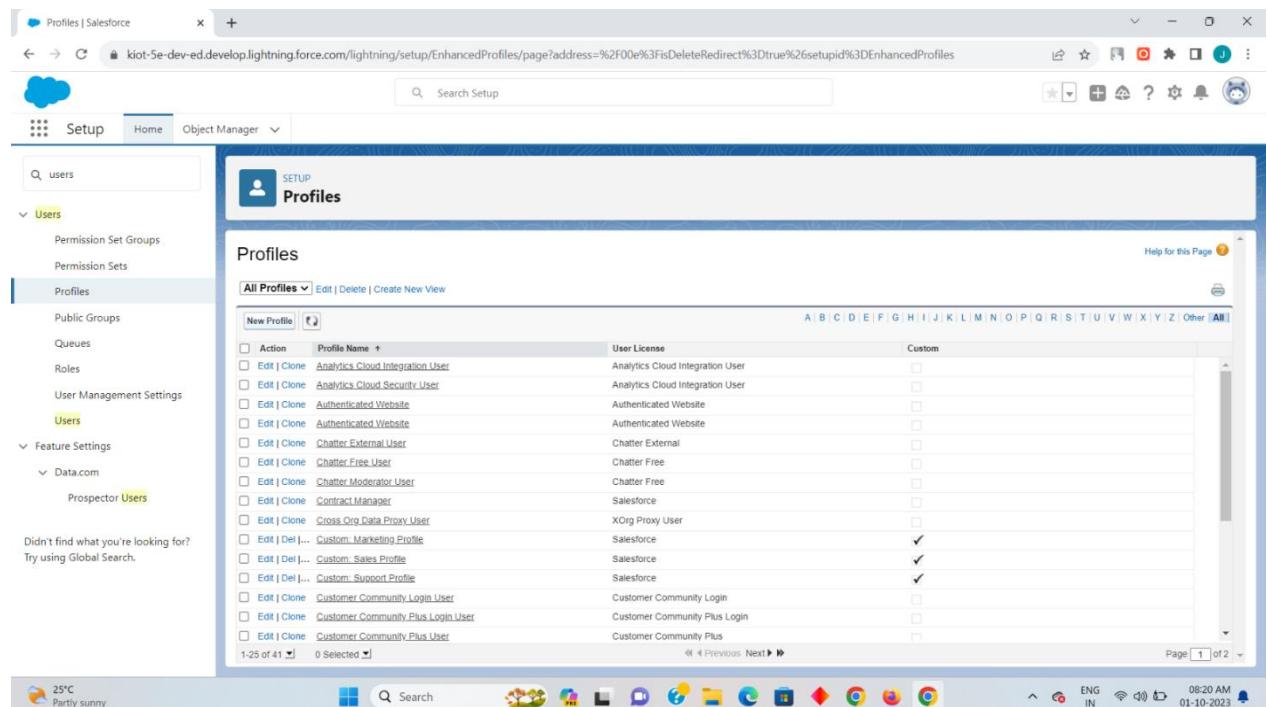
javascript:void(0)

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.

Solution:

Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



The screenshot shows the Salesforce Setup interface with the following details:

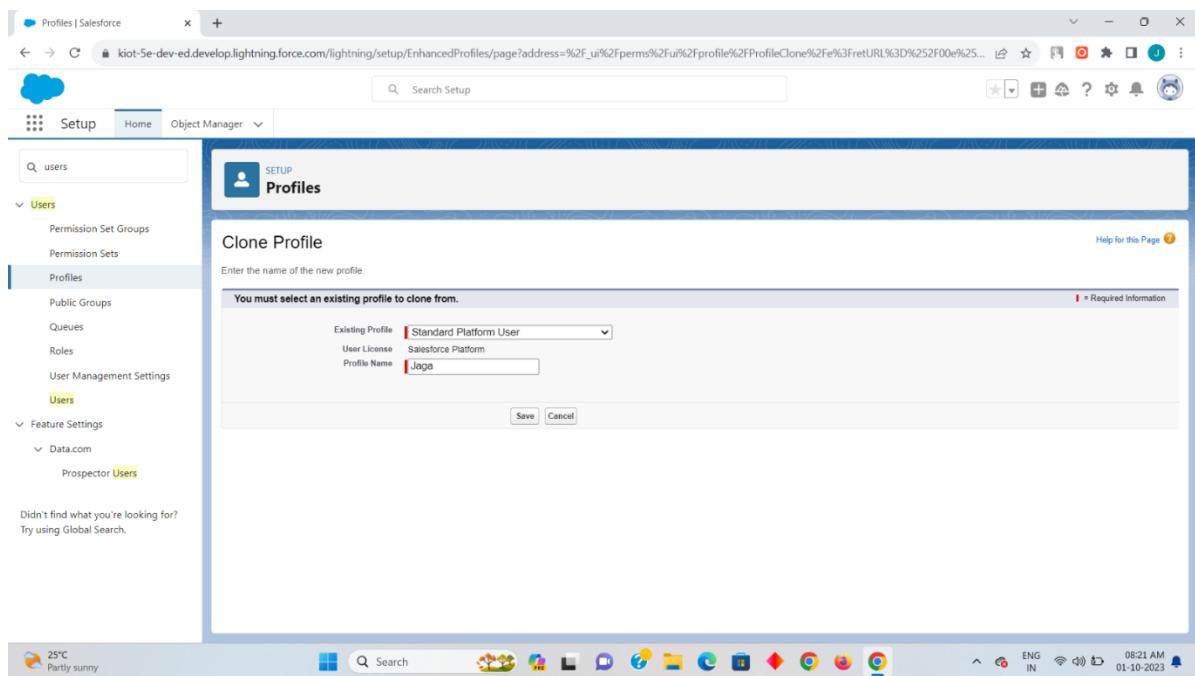
- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager. Under "Users", "Profiles" is selected.
- Section Header:** Profiles
- Sub-Header:** All Profiles
- Table:** A list of profiles with columns: Action, Profile Name, User License, and Custom. Some profiles have checkboxes next to them.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>

- Page Footer:** 25°C Partly sunny, Search, various icons, ENG IN, 08:20 AM, 01-10-2023

Step 2:

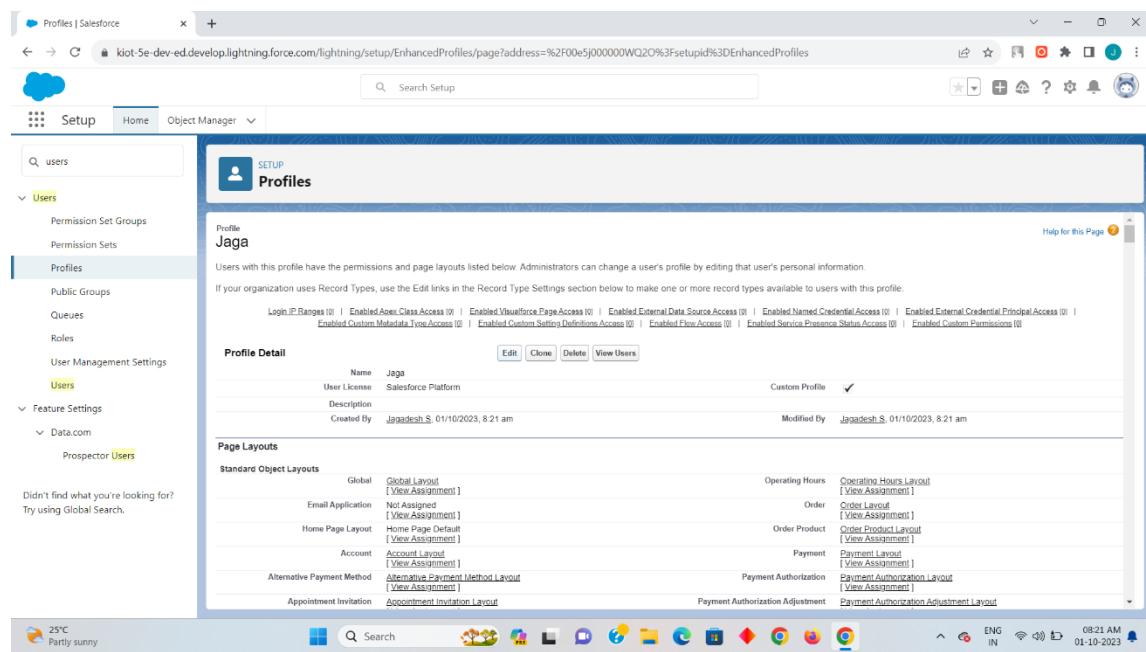
Click on the new to create a new profile along with the label and Api



Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.

Step 3:

Now click on the edit and scroll down to custom object settings and enable the read,create,edit and view options. After that click on save.



Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3FreURL%3D%252F00e5j00000WQ2O%253fsetupid...

Setup Home Object Manager

Search Setup

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

Users

- Feature Settings
- Data.com
- Prospector Users**

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

SETUP Profiles

Communication Subscription Consents Communication Subscription Timings Contacts Contact Point Addresses Contact Point Consents Contact Point Emails Locations Party Consents Push Topics Sellers Streaming Channels User External Credentials

	Read	Create	Edit	Delete	View All	Modify All
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>					
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Party Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>					
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>					

Custom Object Permissions

	Basic Access	Read	Create	Edit	Delete	Data Administration	View All	Modify All
Providers	<input type="checkbox"/>							
Resources	<input type="checkbox"/>							

Session Settings

Session Times Out After: 2 hours of inactivity Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees:
Separate Experience Cloud site and Salesforce login authentication for employees.
Relax login IP restrictions
Skip employee device activation during Experience Cloud site login

25°C Partly sunny

08:21 AM 01-10-2023

Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3FreURL%3D%252F00e5j00000WQ2O%253fsetupid...

Setup Home Object Manager

Search Setup

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- Permission Sets
- Profiles**
- Public Groups
- Queues
- Roles
- User Management Settings

Users

- Feature Settings
- Data.com
- Prospector Users

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

SETUP Profiles

Communication Subscription Consents Communication Subscription Timings Contacts Contact Point Addresses Contact Point Consents Contact Point Emails Locations Party Consents Push Topics Sellers Streaming Channels User External Credentials

	Read	Create	Edit	Delete	View All	Modify All
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>					
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Party Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>					
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>					

Custom Object Permissions

	Basic Access	Read	Create	Edit	Delete	Data Administration	View All	Modify All
Providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resources	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

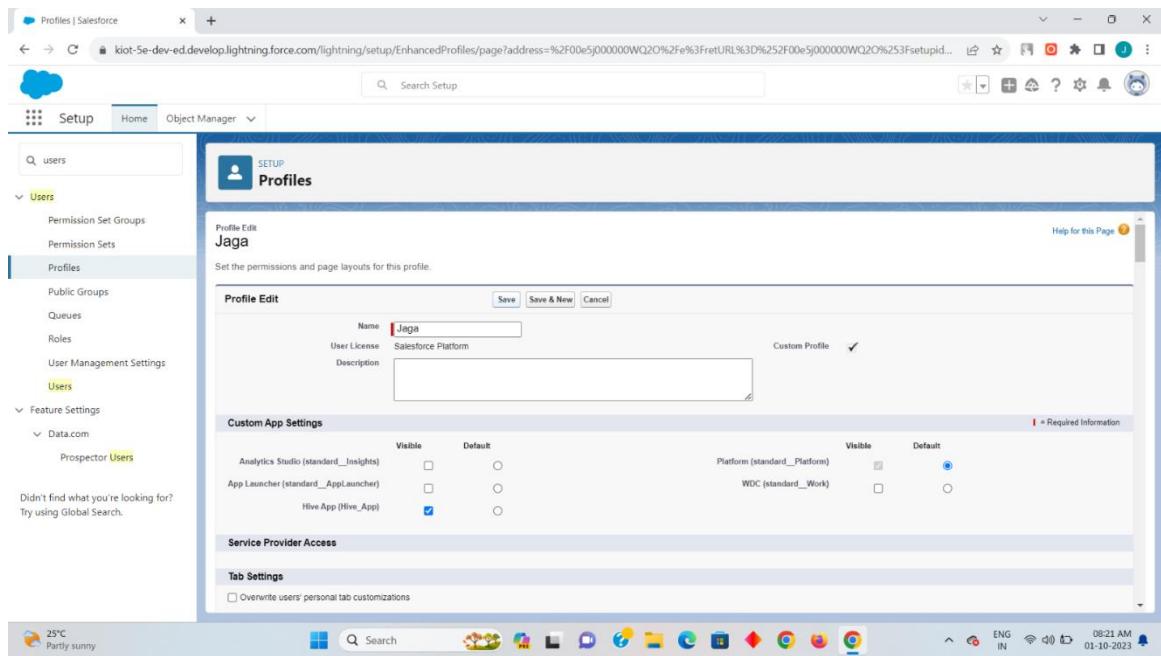
Session Settings

Session Times Out After: 2 hours of inactivity Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees:
Separate Experience Cloud site and Salesforce login authentication for employees.
Relax login IP restrictions
Skip employee device activation during Experience Cloud site login

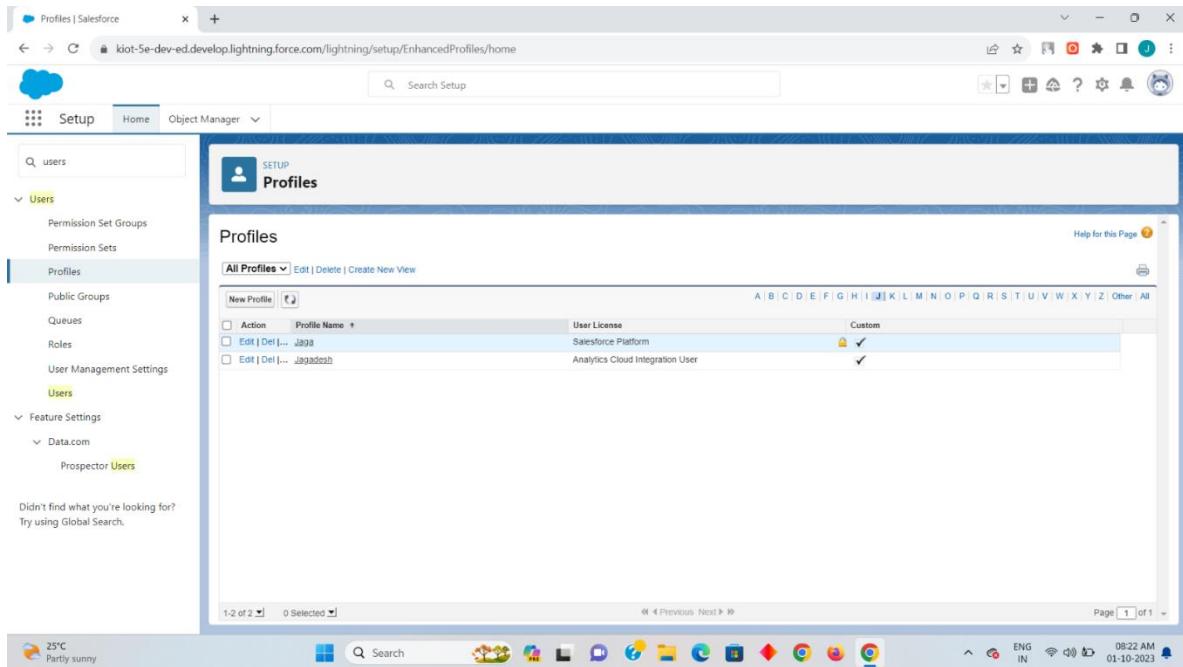
25°C Partly sunny

08:21 AM 01-10-2023



Step 4

Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it



Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along

with the profile as Jaga which we have created on the step 2.once the one user has been created click on the save&new so that you can create the second user and there the user name can be created with alternate name but with the same user profile and once the two user are created click on save.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty@00d500000c8josef6z@brkrkd4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Grey Jane	jocer	jane_gran@nimmraam.c27d2kicoh3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/> Edit	S.Jaga	JS	jaga98@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S.Jagadish	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	S.Jagadish	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	Integ	integration@00d500000c8josef.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d500000c8josef.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Users | Salesforce

Setup Home Object Manager

Search Setup

New User

User Edit Save Save & New Cancel

General Information

First Name	Jagadesh11
Last Name	S
Alias	jR
Email	jwv123@gmail.com
Username	jwv123@gmail.com
Nickname	User169612875144962592
Title	
Company	
Department	
Division	

Role Director, Channel Sales

User License Salesforce Platform

Profile -None-

Active -None-

Marketing User Jaga Standard Platform User

Office User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type -None-

Data.com Monthly Addition Limit Default Limit (300)

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Help for this Page

Did you find what you're looking for? Try using Global Search.

25°C Partly sunny

Q Search ENG IN 08:23 AM 01-10-2023

Users | Salesforce

Setup Home Object Manager

Search Setup

New User

User Edit Save Save & New Cancel

General Information

First Name	Jagadesh22
Last Name	S
Alias	jR
Email	jw1@gmail.com
Username	jw1@gmail.com
Nickname	User169612879983618745
Title	
Company	
Department	
Division	

Role Marketing Team

User License Salesforce Platform

Profile -None-

Active -None-

Marketing User Jaga Standard Platform User

Office User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type -None-

Data.com Monthly Addition Limit Default Limit (300)

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Help for this Page

Did you find what you're looking for? Try using Global Search.

25°C Partly sunny

Q Search ENG IN 08:23 AM 01-10-2023

Users | Salesforce

Setup Home Object Manager

Search Setup

All Users

On this page you can create, view, and manage users.

In addition, download Salesforce@ to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit S.Jagadesh	jR	jw1@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit S.Jagadesh	jR	jw111@gmail.com	SP Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit S.Jagadesh	jR	jw1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	Edit S.Jagadesh11	jR	jwv123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	Edit S.Jagadesh22	jR	jw1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Marketing Team

New User Reset Password(s) Add Multiple Users

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

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

Did you find what you're looking for? Try using Global Search.

25°C Partly sunny

Q Search ENG IN 08:24 AM 01-10-2023

Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

Step 6:

Now the two useras been created with the profle so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can created as

setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.

Permission Sets | Salesforce

kot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | [Edit](#) | [Delete](#) | [Create New View](#)

New

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories, includes all buyer capabilities, and allows access to manage carts and orders.	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Allow access to commerce admin features.	CRM User
<input type="checkbox"/>	Commerce Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Manage Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Deli Clone	Experience Profile Manager	Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, publications, queues, and other facility management objects.	Facility Manager
<input type="checkbox"/>	FieldServiceMobileTransferPermSet	Give your mobile workforce access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/>	Merchandise	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management.	Lightning Order Management User

1-25 of 30 | 0 Selected | [New](#) | [Edit](#) | [Delete](#) | [Create New View](#) | [Help for this Page](#)

Page | 1 | of 2

https://kot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/home

25°C Partly sunny

Q Search

ENG IN 06:24 AM 01-10-2023

Permission Sets | Salesforce

kot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Permission Set Create

Enter permission set information

Label: API Name: Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

-Choose “None” – if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License:

Save Cancel

https://kot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

25°C Partly sunny

Q Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgta%3FsfclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Did you find what you're looking for?
Try using Global Search.

25°C Partly sunny

Search

Cloud File Explorer Home Help

Video Tutorial | Help for this Page

API Name permission12
Namespace Prefix
Created By Jagadish S. 01/10/2023, 8:24 am

Last Modified By Jagadish S. 01/10/2023, 8:24 am

Permission Set Overview

Description
License
Session Activation Required
Last Modified By

Apps

Assigned Apps
Assigned Connected Apps
Object Settings
App Permissions
Apex Class Access
Visualforce Page Access
External Data Source Access

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgta%3DEntityPermissions

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Did you find what you're looking for?
Try using Global Search.

25°C Partly sunny

Search

Cloud File Explorer Home Help

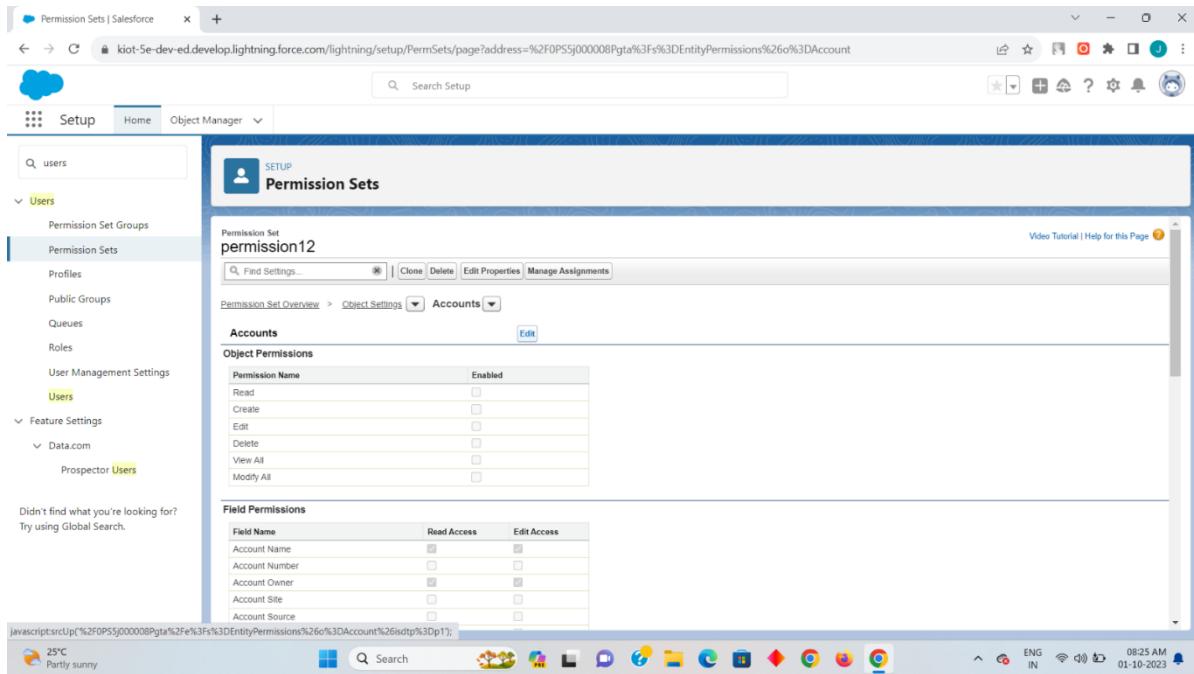
Video Tutorial | Help for this Page

Object Settings

Object Name Object Permissions Total Fields Tab Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	9	--
Accounts	No Access	44	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Activity Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assessments	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	--

ENG IN 08:25 AM 01-10-2023



Step 7:

Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

The screenshots show the Salesforce Setup interface for creating a new Permission Set named 'permission12'. The left screenshot shows the initial configuration where 'Edit' is checked for all object permissions (Read, Create, Edit, Delete). The right screenshot shows the configuration after 'Delete' has been checked for the 'Edit' permission.

Object Permissions	Permission Name	Enabled	
Object Permissions	Read	<input type="checkbox"/>	
	Create	<input type="checkbox"/>	
	Edit	<input checked="" type="checkbox"/>	
	Delete	<input checked="" type="checkbox"/>	
Field Permissions	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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Account Site	<input type="checkbox"/>	<input type="checkbox"/>
	Account Source	<input type="checkbox"/>	<input type="checkbox"/>

Step 8

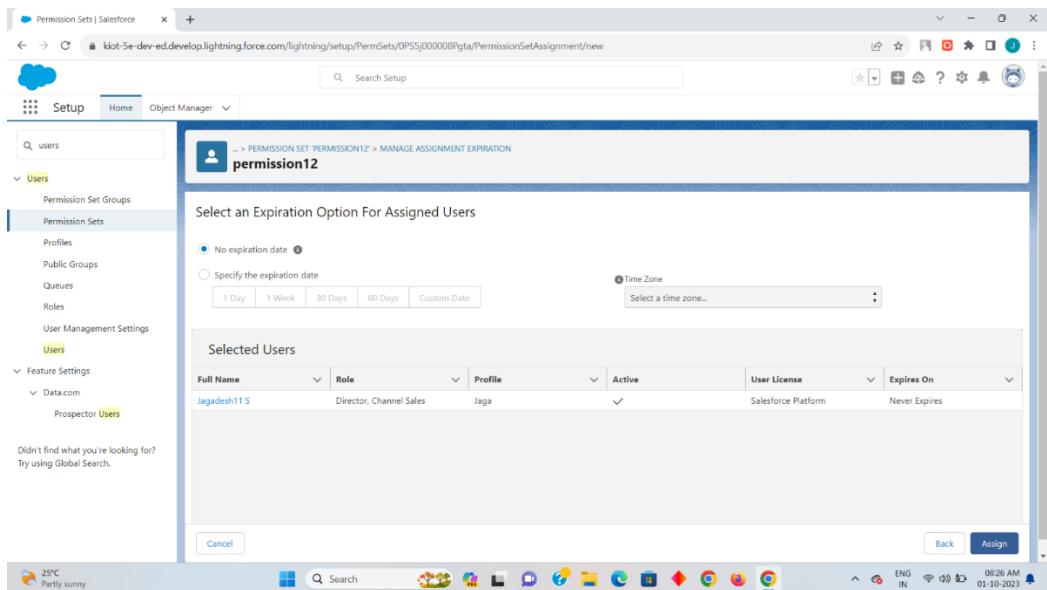
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.

The screenshot shows the 'Permission Sets | Salesforce' page. The left sidebar is expanded, showing 'Users' under 'Permission Set Groups'. The main content area is titled 'permission12' and shows the 'Current Assignments' section. It features a decorative illustration of a cactus, sun, and clouds. Below the illustration, a message says 'No assignments defined.' A small note at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

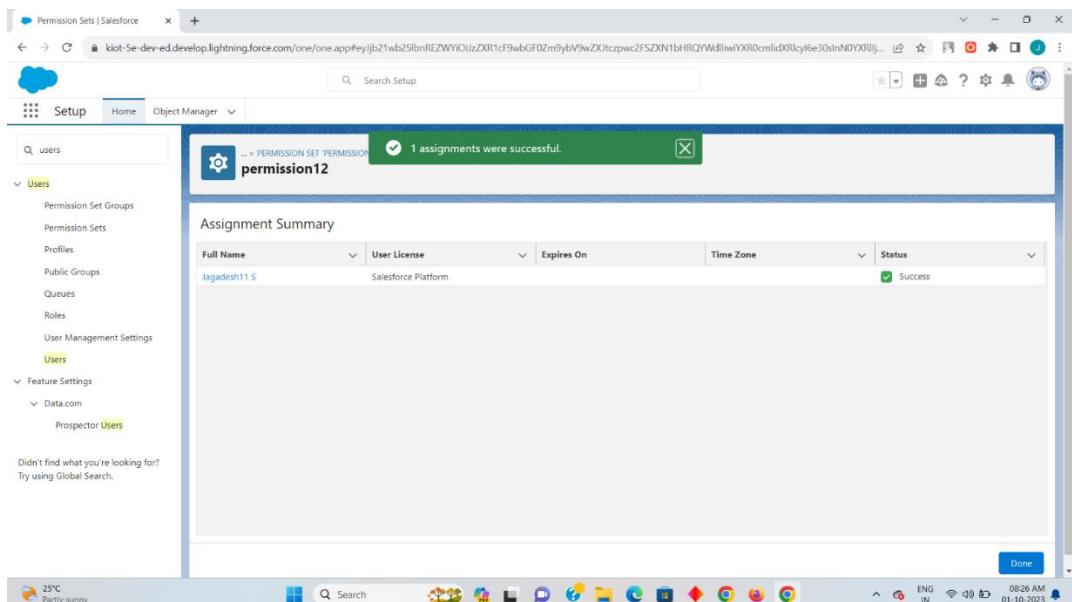
This screenshot shows the 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog. The title bar says 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION'. The main area is titled 'Select Users to Assign' and shows a table of users. A search bar at the top right contains 'jagadesh'. A tooltip above the search bar says 'Roles, Alias, and Profile aren't searchable. Use filters or sort on these fields instead.' The table has columns: Full Name, Alias, Username, Role, Active, and Profile. One row is selected, showing Jagadesh S with role SF Admin and checked 'Active'. Other users listed include Jagadesh11 S, Jagadesh22 S, and Jagadesh111 S.

This screenshot shows the same 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog. The search bar now contains 'jagadesh'. The table shows four users selected: Jagadesh S, Jagadesh11 S, and two others whose names are partially visible. The 'Active' column for all selected users has checkboxes checked. The 'Profile' column shows 'System Administrator' for Jagadesh S and 'Standard Platform User' for the others.

Click on next.



Now click on Assign.



Now the specific access for the Jagadesh11 user has been assigned successfully.

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

Solution:

Step 1: Create a Custom Object

The next step is to create a custom object **Survey Result** and a few custom fields to store survey responses.

1. Click **Setup**.
2. In the Object Manager, click **Create | Custom Object**.
3. Now create a custom object **Survey Result** and fields as shown in the screenshot below:
4. Click **Save**.



SETUP > OBJECT MANAGER
Survey Result

Details	Fields & Relationships				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Comment	Comment__c	Text Area(255)		▼
Lightning Record Pages	Created By	CreatedById	Lookup(User)		▼
Buttons, Links, and Actions	Email	Email__c	Email		▼
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		▼
Field Sets	Name	Name__c	Text(51)		▼
Object Limits	Owner	OwnerId	Lookup(User,Group)	✓	▼
Record Types	Rating	Rating__c	Picklist		▼
Related Lookup Filters					
Search Layouts	Survey Result Name	Name	Auto Number	✓	▼
Search Layouts for Salesforce Classic					
Triggers					
Validation Rules					

Step 2: Create a Thank You For Survey Lightning Email Template

1. Click **App Launcher**.
2. In the Quick Find box, type **Email Templates**.
3. Clicks on the **New Email template** button.
4. Name the **Lightning Email Template** and make sure to store it in the **Public Email Templates** folder.
5. Create a template like the following screenshot.

Email Template
Thank You Email - Survey

Details Related

Information

Email Template Name Thank You Email - Survey	Related Entity Type Survey Result
Description	Folder Public Email Templates
Made in Email Template Builder <input checked="" type="checkbox"/>	

Message Content

Subject Thank You For Completing Our Survey!	Enhanced Letterhead
HTML Value	<p>Hi {{{Survey_Result__c.Name__c}}},</p> <p>Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>

Additional Information

Created By Rakesh Gupta , 12/21/2020, 4:23 PM	Last Modified By Rakesh Gupta , 12/21/2020, 4:32 PM
--	--

Step 3: Create an Email Alert

- 1. Click Setup.**
- 2. In the Quick Find box, type Email Alerts.**
- 3. Select Email Alerts, click on the New Email Alert button.**
- 4. Name the Email Alert and click the Tab button. The Unique Name will populate.**

- 5. For Object select Survey Result.**
- 6. For the Email Template chooses Lightning Email Template Thank You Email – Survey.**
- 7. For Recipient Type select Email Field: Email.**
- 8. Click Save.**

Survey - Thank You Email

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Recipient Type: Email Field: Email

Available Recipients:

- User: Integration User
- User: Rakesh Gupta
- User: Security User

Selected Recipients:

- Email Field: Email

You can enter up to five (5) email addresses to be notified.

Additional Emails:

From Email Address: Current User's email address

Make this address the default From email address for this object's email alerts.

Step 4.1: Salesforce Flow — Create a Screen that Allow Users to Fill Survey

- 1. Click Setup.**

2. In the Quick Find box, type **Flows**.
3. Select **Flows** then click on the **New Flow**.
4. Select the **Screen Flow** option and click on **Next** and configure the flow as follows:
 1. **How do you want to start building:** **Freeform**
5. We will use the **Screen** element to capture a **Survey response** form. Drag and drop a **Screen** element onto the canvas.

Step 4.2: Salesforce Flow — Add a Record Creates Element to Save Survey Response

1. Drag-and-drop the **Create Records** element onto the Flow designer.
2. Enter a name in the **Label (Save Response)** field; the **API Name** will auto-populate.
3. For **How Many Records to Create** – select **One**.
4. For **How to Set the Record Fields** – select **Use separate resources, and literal values**.
5. Select the **Survey_Result__c** object from the dropdown list.
6. **Set Field Values for the Survey Result**
 1. Row 1:
 1. **Field: Comment__c**

- 2. Value: {!Comment}**
- 2. Click Add Row**
- 3. Row 2:**
 - 1. Field: Email__c**
 - 2. Value: {!Email.value}**
- 4. Click Add Row**
- 5. Row 3:**
 - 1. Field: Name__c**
 - 2. Value: {!Name.firstName}**
{!Name.lastName}
- 6. Click Add Row**
- 7. Row 3:**
 - 1. Field: Rating__c**
 - 2. Value: {!Rating}**
- 7. Click Done.**

Edit Create Records

Create Salesforce records using values from the flow.

* Label: Save Response * API Name: Save_Response

Description:

How Many Records to Create
 One
 Multiple

How to Set the Record Fields
 Use all values from a record
 Use separate resources, and literal values

Create a Record of This Object
* Object: Survey Result

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text" value="A_a Comment"/>
Email__c	<input type="text" value="A_a Email > Value"/>
Name__c	<input type="text" value="(!Name.firstName) {!Name.lastName}"/>
Rating__c	<input type="text" value="A_a Rating"/>
+ Add Field	
<input type="checkbox"/> Manually assign variables	

[Cancel](#) [Done](#)

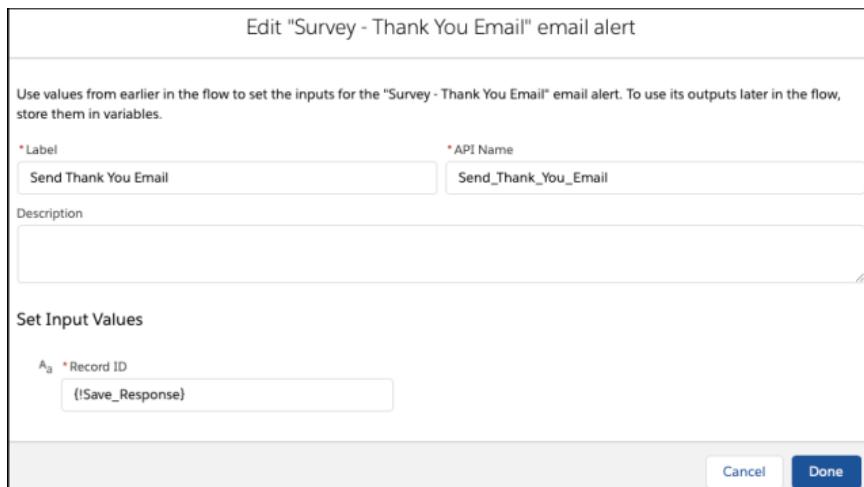
Step 4.3: Salesforce Flow — Call an Action — Email Alert to Send Out Thank You Email

The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

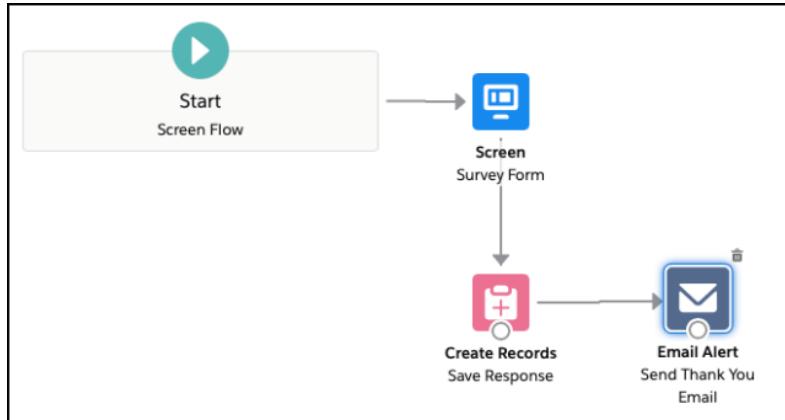
- 1.Under **Toolbox**, select **Element**.
- 2.Drag-and-drop **Action** element onto the Flow designer.
- 3.In the **Action** box, type **Survey – Thank You Email**.

4. Clicks on the Survey – Thank You Email email alert.

5. Click Done.



In the end, Sergio's Flow will look like the following screenshot:



1. Click Save.

2. Enter **Flow Label** the **API Name** will auto-populate.

3. Click **Show Advanced**.

4. How to Run the Flow: User or System Context—Depends on How Flow is Launched

5. Type: Screen Flow

6. API Version for Running the Flow: 51

7. Interview Label: Survey

{!\$Flow.CurrentDateTime}

8. Click Save.

Save as

A New Version A New Flow

* Flow Label * Flow API Name

Survey Survey

Description

Hide Advanced

How to Run the Flow i

User or System Context—Depends on How Flow is Launched

* Type

Screen Flow

* API Version for Running the Flow

51

Interview Label i

Insert a resource... 🔍

Survey {!\$Flow.CurrentDateTime}

Last Modified
12/21/2020, 4:54 PM by Rakesh Gupta

Status: Active

Type: Screen Flow

Version Number: 2

Cancel Save

This screenshot shows the 'Save as' dialog for creating a new flow. The 'A New Version' button is highlighted. The flow is titled 'Survey' and has an API name of 'Survey'. The 'How to Run the Flow' setting is configured to 'User or System Context—Depends on How Flow is Launched'. The flow type is 'Screen Flow' and the API version is '51'. The interview label is set to the formula '{!\$Flow.CurrentDateTime}'. The status is 'Active', the type is 'Screen Flow', and the version number is '2'. The dialog includes standard save and cancel buttons at the bottom.

Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a Visualforce Page

Now we will create a Lightning Application that declares a dependency on the **lightning:flow** component.

1. Click **Setup | Developer Console**
2. Navigate to **File | New | Lightning Application**
3. Enter a **Name (VFPPageToLC)** field, make sure to select the **Lightning Out Dependency App** checkbox.
4. Click **Submit**.
5. Copy code from [**GitHub**](#) and paste it into your Lightning Application.
6. **Save** your code.

The screenshot shows the Salesforce IDE interface. The top menu bar includes File, Edit, Debug, Test, Workspace, Help, and navigation icons. A tab labeled "VFPageToLC.app *" is active. The main editor area contains the following code:

```
1 <aura:application access="global"
2     extends="ltng:outApp"
3     implements="ltng:allowGuestAccess">
4     <aura:dependency resource="lightning:flow"/>
5 </aura:application>
```

The code defines a Lightning Application component named "VFPageToLC.app". It specifies global access, extends the "ltng:outApp" base component, and implements the "ltng:allowGuestAccess" interface. It also declares a dependency on the "lightning:flow" component.

Step 6: Create a Visualforce Page and Embed Your Flow Into It

Now we will create a Lightning Application that declares a dependency on the **lightning:flow** component.

Add the Lightning Components for Visualforce JavaScript library to your Visualforce page using the **<apex:includeLightning/>** component. In the Visualforce page, reference the dependency app. Then write a JavaScript function that creates the

component on the page using **\$Lightning.createComponent()**

1. Click **Setup**.
2. In the Quick Find box, type **Visualforce Pages**.
3. Clicks on the **New** button.
4. Copy code from [GitHub](#) and paste it into your visualforcepage
5. Click **Save**.

The screenshot shows the 'Visualforce Page Survey' setup screen. The 'Page Information' section includes fields for Label ('Survey'), Name ('Survey'), and Description. Under 'Available for Lightning Experience, Experience Builder sites, and the mobile app', the checkbox is checked. Under 'Require CSRF protection on GET requests', the checkbox is unchecked. Below this, the 'Visualforce Markup' tab is selected, displaying the following code:

```
<apex:page showheader="false" lightningStylesheets="true">
<html>
<head>
<apex:includeLightning />
<!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualforce page-->
</head>
<body class="slds-scope">
<div id="flowContainer" />
<script>
var statusChange = function (event) {
if(event.getParam("status") === "FINISHED") {
var outputVariables = event.getParam("outputVariables");
var key;
for(key in outputVariables) {
if(outputVariables[key].name === "myOutput") {
}
}
}
};
$Lightning.use("c:VFFPageToLC", function() {
$Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
"flowContainer",
function (component) {
component.startFlow("Survey", );
}
);
});
</script>
</body>
```

Step 7: Create a Force.com Site to Open Your Flow for Unauthenticated Access

Now we will create a site to open the flow for unauthenticated access.

1. Click **Setup**.

2. In the Quick Find box, type **Sites**.
3. Clicks on the **New** button.
4. Fill the details as per the screenshot below:
5. Click **Save**.

Site Edit

Save **Cancel**

Site Label	Survey	
Site Name	Survey	
Site Description	 	
Site Contact	Rakesh Gupta	
Default Record Owner	Rakesh Gupta	
Default Web Address	http://kathiarch-developer-edition.gus.force.com/survey	
Active	<input checked="" type="checkbox"/>	
Active Site Home Page	Survey	[Preview]
Inactive Site Home Page	InMaintenance	[Preview]
Site Template	SiteTemplate	
Site Robots.txt	 	
Site Favorite Icon	 	
Analytics Tracking Code	 	
URL Rewriter Class	 	
Enable Feeds	 	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	
Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/>	
Lightning Features for Guest Users	<input checked="" type="checkbox"/>	
Upgrade all requests to HTTPS	<input checked="" type="checkbox"/>	
Enable Content Sniffing Protection	<input checked="" type="checkbox"/>	
Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/>	
Referrer URL Protection	<input checked="" type="checkbox"/>	
Guest Access to the Payments API	<input type="checkbox"/>	

Under site, **Public Access Settings** make sure that guest users have **Create** access on **Survey Result** object and **Edit** on the **fields**.

Proof of Concept

Now onward, if someone opens the site url and fills the form:

Survey

Name

First Name
Alok

Last Name
Sinfal

*Email
[REDACTED]

*Rating
5

*Comment
Awesome Blog



Next

After successful submission, he/she will receive an email.

Thank You For Completing Our Survey!  [Inbox](#) 

 **Survey Site Guest User** via [bj9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com](#) to me  8:09 PM (1 minute ago)   

Hi Alok Sinfal,

Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.

Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.

Thanks,
Automation Champion