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Salesforce
Developer(Course)
Assignment no 1

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Year & Dep : 4th year & CSE
Batch : 2024
Zone no : Zone 8

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.

Setup

Home

Object Manager

Search Setup

Setup

New Custom Object

New Custom Object

Help to this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tail me now!](#) [Don't show this message again](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

Required Information

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

Label college Example: Account

Plural Label colleges Example: Accounts

Starts with vowel sound ☐

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

Object Name college Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Context Name

Enter Record Name Label and Format

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

Record Name college Name Example: Account Name

Data type Text

Optional Features

☐ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

[What is this?](#)

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

☐ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

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

The screenshot shows the Salesforce Setup interface, specifically the Object Manager section. The page title is "New Custom Object". A yellow banner at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by writing custom profiles. [Tailor the menu!](#) [Don't show this message again](#)".

The main section is "Custom Object Definition Edit" with buttons for "Save", "Save & New", and "Cancel". It is divided into several sections:

- Custom Object Information:** This section includes fields for "Label" (set to "department", example: "Account"), "Plural Label" (set to "departments", example: "Accounts"), and "Object Name" (set to "department", example: "Account"). There is also a "Description" text area and a "Context-Sensitive Help Setting" with two options: "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page".
- Enter Record Name Label and Format:** This section includes a "Record Name" field (set to "Department Name", example: "Account Name") and a "Data Type" dropdown menu (set to "Text").
- Optional Features:** This section includes checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing".
- Object Classification:** This section includes a note about object classification and checkboxes for "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access".
- Deployment Status:** This section includes checkboxes for "In Development" and "Deployed".
- Search Status:** This section includes a checkbox for "Allow Search".
- Object Creation Options (Available only when custom object is first created):** This section includes checkboxes for "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".

At the bottom of the page, there are buttons for "Save", "Save & New", and "Cancel".

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.

Setup

Home

Object Manager

Search Setup

CDepartment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name

CDepartment__c

Custom

✓

Singular Label

CDepartment

Plural Label

CDepartments

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Setup

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Scoping Rules

Triggers

Flow Triggers

Validation Rules

CDepartment

New Relationship

Help for this Page

Step 3 of 6

Step 3. Enter the label and name for the lookup field

Field Label

college

Field Name

college

Description

Help Text

Child Relationship Name

CDepartments

Sharing Setting

☒ 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.

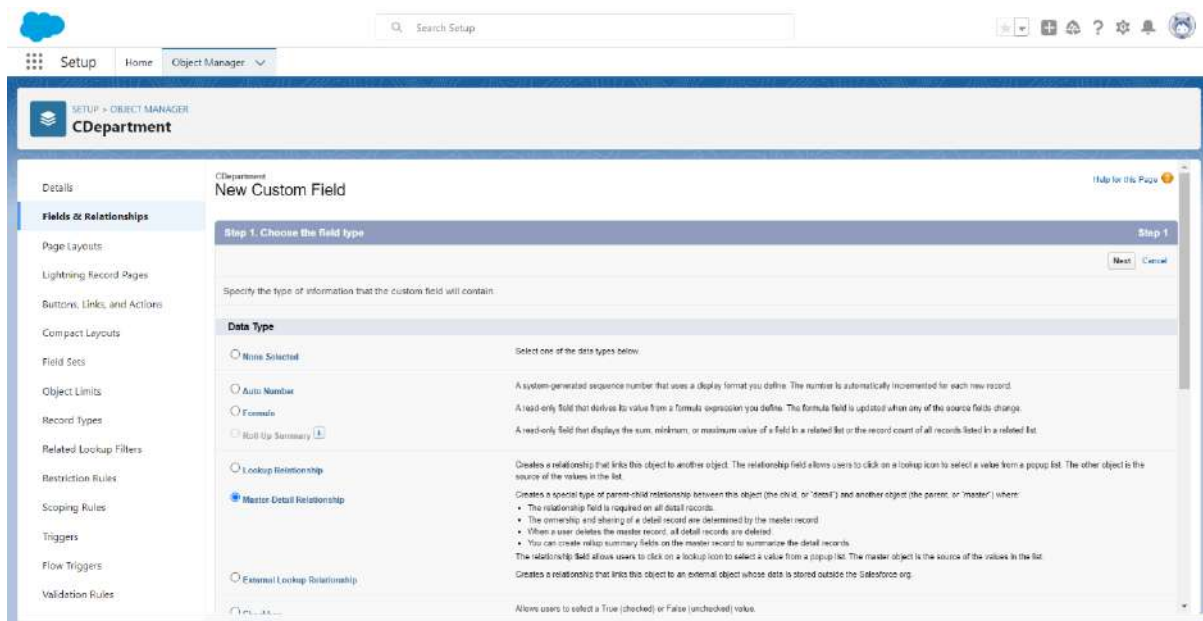
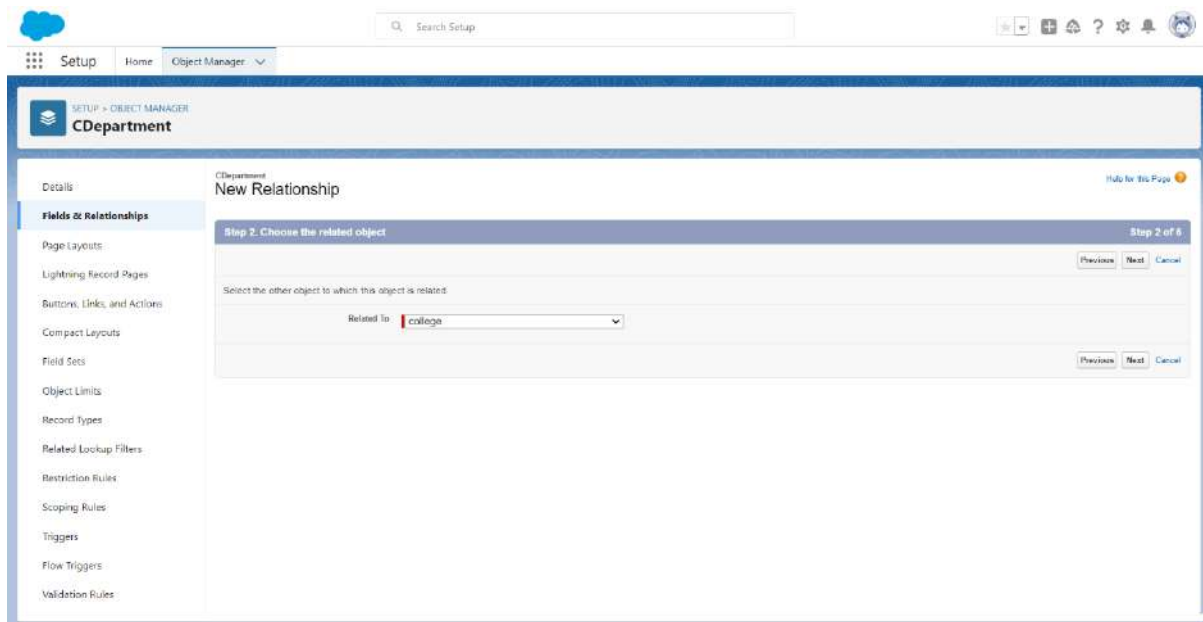
Allow reparenting

☐ Child records can be reparented to other parent records after they are created.

☒ Add this field to existing custom report types that contain this entry.

Auto add to custom report type

Lookup Filter



Step 3: Create the Roll-Up Summary Field

Now, let's create a Roll-Up Summary Field on the "College_C" to calculate the total number 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.**

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

CDepartment

Details

Fields & Relationships

4 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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)		

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Record Types

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Scoping Rules

Triggers

Flow Triggers

Validation Rules

Setup

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Object Manager

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Setup

Tabs

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

Custom Tabs

Help for this Page

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

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

Custom Object Tabs

New

What Is This?

Action	Label	Tab Style	Description
Edit Del	Books	Books	
Edit Del	Research Proposal	Square	
Edit Del	Student	Book	

Web Tabs

New

What Is This?

No Web Tabs have been defined

Visualforce Tabs

New

What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New

What Is This?

No Lightning component tabs have been defined

Lightning Page Tabs

New

What Is This?

No Lightning Page Tabs have been defined

cloud

college

SetupHomeObject Manager

college

Details

Fields & Relationships

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college

New Custom Field

Help for this Page

Step 6 of 6

Step 6. Add to page layouts

Field Label: Total count

Data Type: Roll-Up Summary

Field Name: Total_count

Description:

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

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

☒ Add Field

☒ Page Layout Name

college Layout

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

PreviousSave & NewSaveCancel

cloud

college

SetupHomeObject Manager

college

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college

New Custom Field

Help for this Page

Step 4 of 6

Step 4. Establish field-level security

Field Label: Total count

Data Type: Roll-Up Summary

Field Name: Total_count

Description:

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

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

college

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Validation Rules

college

New Custom Field

Help for this Page

Step 3 of 5

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: college

Summarized Object: CDepartments

Select Roll-Up Type

COUNT

SUM

MIN

MAX

Field to Aggregate: Name

Filter Criteria

All records should be included in the calculation

Only records meeting certain criteria should be included in the calculation

Previous

Next

Cancel

college

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Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 2 of 5

Step 2. Enter the details

Field Label: Total count

Field Name: Total_count

Description

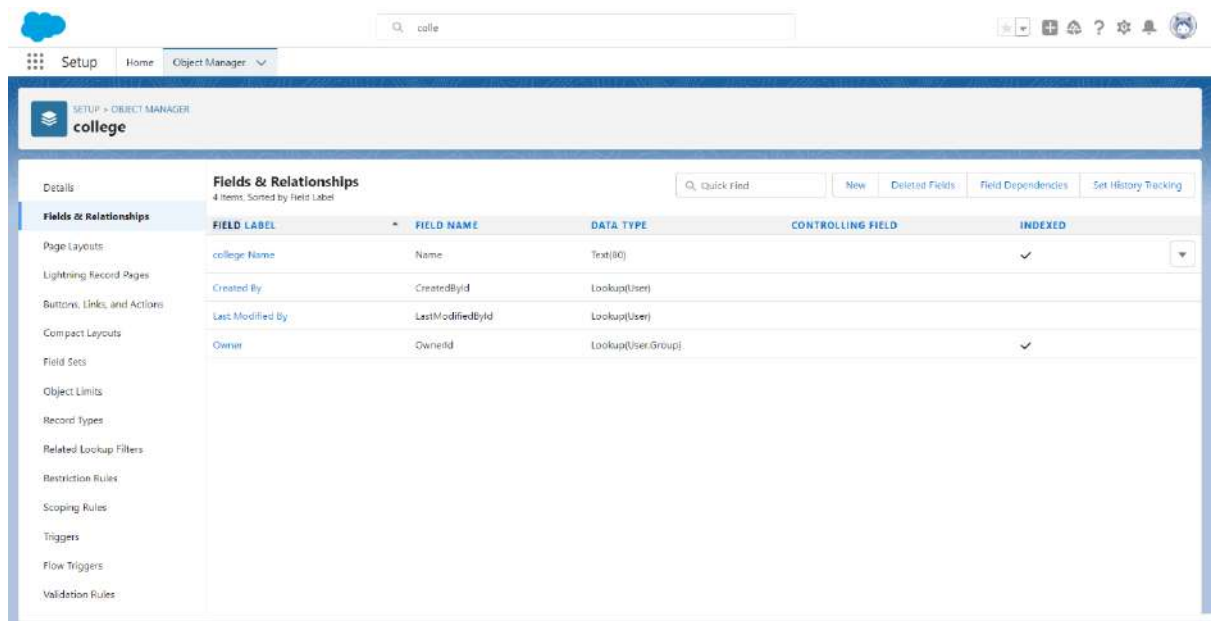
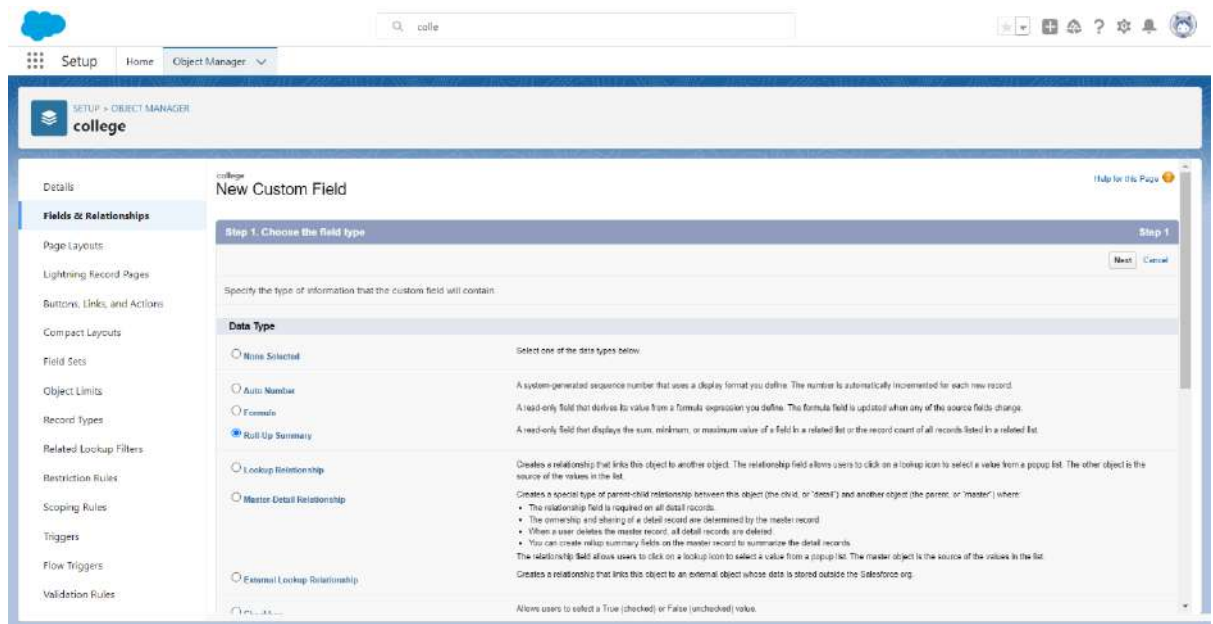
Help Text

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

Previous

Next

Cancel



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.**



Search Setup



Setup

Home

Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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



New Custom Object Tab

Help for this Page

Step 2: Add to Profiles

Step 2 of 3

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.

- ☒ Apply one tab visibility to all profiles (Default On) ▼
☐ Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Cloud Kiosk Admin	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
customer	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On
Customer Portal Manager Custom	Default On
Customer Portal Manager Standard	Default On
External Apps Login User	Default On
External Identity User	Default On
Force.com - App Subscription User	Default On
Force.com - Free User	Default On
Gold Partner User	Default On
High Volume Customer Portal	Default On
High Volume Customer Portal User	Default On
Identity User	Default On
Manager	Default On
Marketing User	Default On
Minimum Access - Salesforce	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Research Manager	Default On
Research User	Default On
Salesforce API Only System Integrations	Default On
Sales User	Default On
security profile	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

Previous Next Cancel

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Q tabs

User Interface

Rename Tabs and Labels

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

SETUP

Tabs

Help for this Page

New Custom Object Tab

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now

Object:

collage

Tab Style:

new

(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

Enter a short description.

Description:

Next Cancel

Setup

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

SETUP

Tabs

Help for this Page

Step 3. Add to Custom Apps

Step 3 of 3

Choose the custom apps 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 Custom App.

Custom App	<input checked="" type="checkbox"/> 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__Site)	<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__SalesforceOIS)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
Bot Solutions (standard__LightningBot)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to user's existing personal customizations	

Previous Save Cancel

Search Setup

Setup

Home

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Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

Help for this Page

New Custom Object Tab

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

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--

Enter a short description

Description

Next

Cancel

Search Setup

Setup

Home

Object Manager

Q app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Packaging

Installed Packages

SETUP

Lightning Experience App Manager

New Lightning App

New Connected App

20 items • Sorted by App Name • Filtered by All app namespaces • TabSet Type

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

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SETUP

Tabs

Custom Tabs

Help for this Page

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Custom Object Tabs

New | What Is This?

Action	Label	Tab Style	Description
Edit Del	Book1	Book	
Edit Del	Departments	Lightning	
Edit Del	challenges	Jigsaw	
Edit Del	Richards Proposal	Square	
Edit Del	student	Box	

Web Tabs

New | What Is This?

No Web Tabs have been defined

Visualforce Tabs

New | What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New | What Is This?

No Lightning component tabs have been defined

Lightning Page Tabs

New | What Is This?

No Lightning Page Tabs have been defined

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.

MECW

My college colleges CDepartments student Content

Search...



college
mecw

New Contact Edit New Opportunity

Related

Details

college Name

mecw

Total count

2

phone

9087116402

Email

kdot@gmail.com

Location

90, 80

Created By

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

Owner

krishna s

Last Modified By

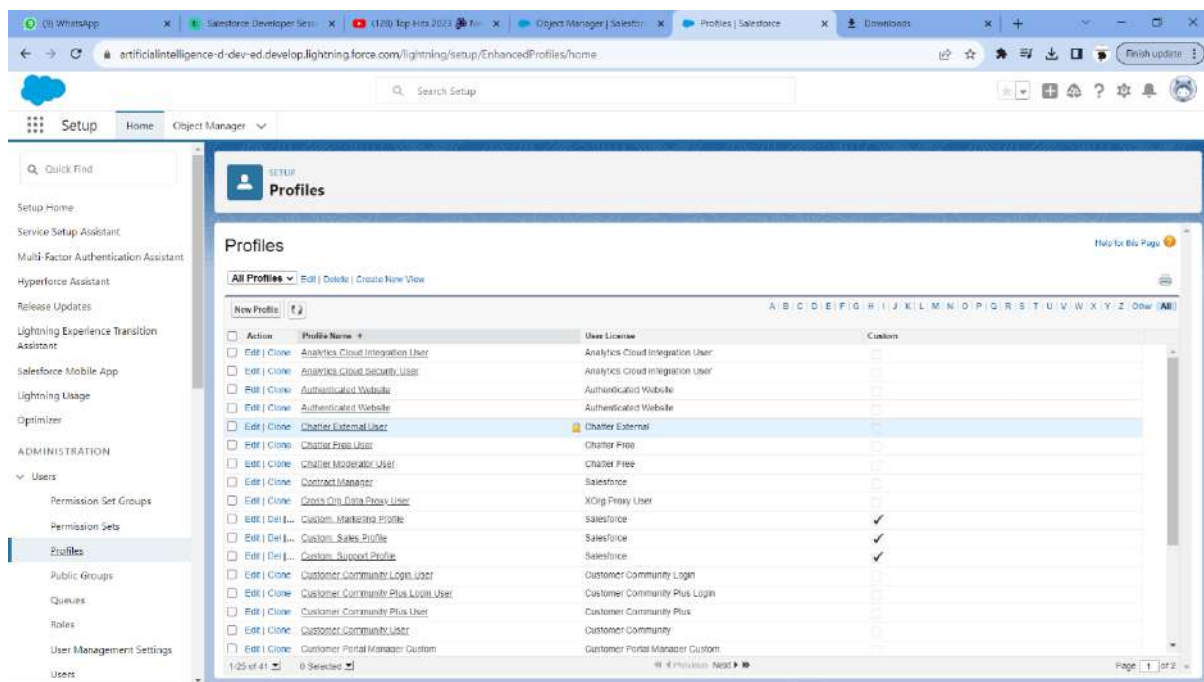
krishna s. 01/10/2023, 11:19 am

History

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

Solution:

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



artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

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

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 Clone	System Administrator	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Single Partner User	Single 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 | 4 Profiles | Next > < Back

Page 1 of 1

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fui%2Fprofile%2FprofileClone%2F%...

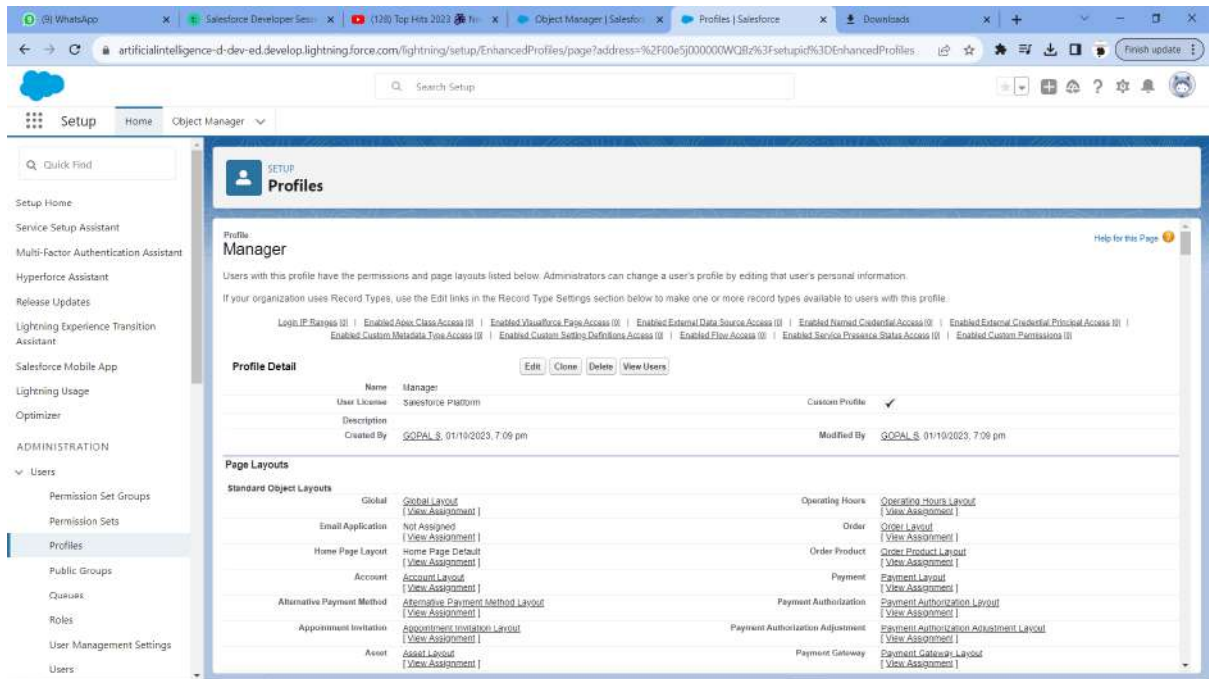
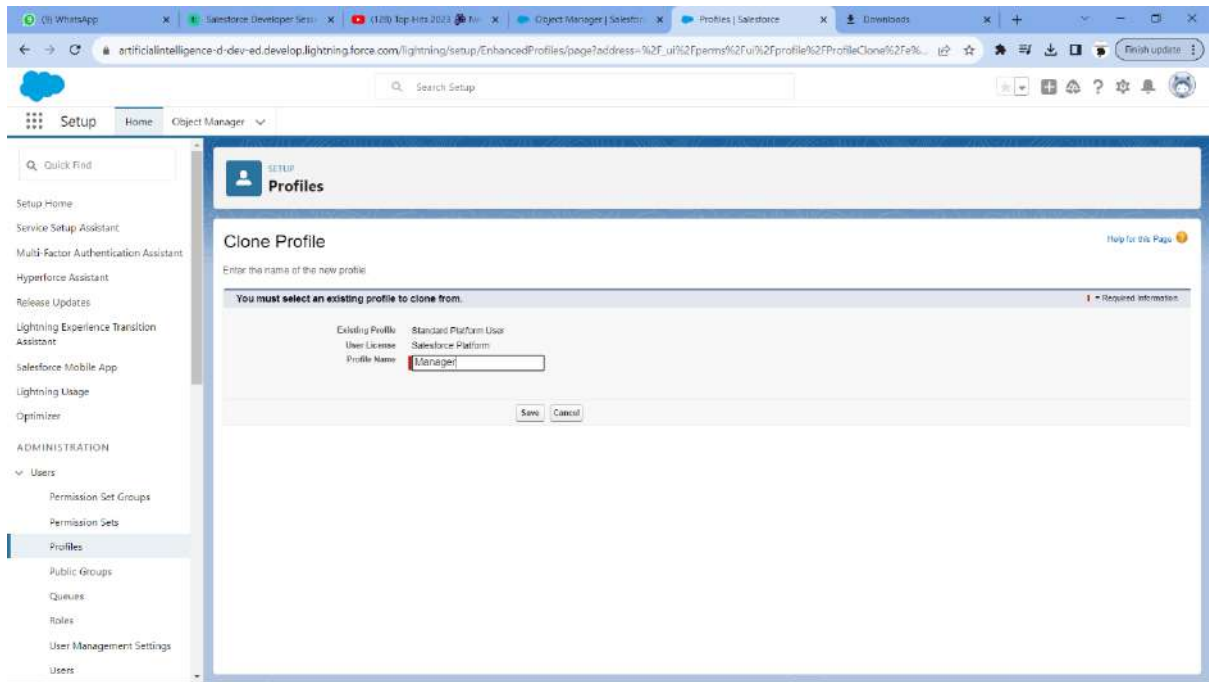
Clone Profile

Enter the name of the new profile

You must select an existing profile to clone from.

Existing Profile	User License	Profile Name
Standard Platform User	Standard Platform	

Save Cancel



Setup Profiles Manager

Set the permissions and page layouts for this profile

Profile Edit

Name: Manager
User License: Salesforce Platform
Description:
Custom Profile: ☒

Custom App Settings

	Visible	Default
Analytics Studio (standard__Analytics)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>
Kit (Kit)	<input checked="" type="checkbox"/>	<input type="radio"/>
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
WCX (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

☐ Overwrite users' personal tab customizations

Standard Tab Settings

	Home	Default On
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alert Settings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Learning: ☒ Default On
Libraries: ☒ Tab Hidden
Lightning Bolt Solutions: ☒ Default On

Setup Profiles

Communication Subscription Channel Types

	Read	Create	Edit	Delete	View All	Modify All
Communication Subscription Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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"/>	<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"/>
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"/>

Custom Object Permissions

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

Session Settings

Session Timeout 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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2F%3FretURL%3D%2F00e5j0...

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Hyperforce Assistant

Release Updates

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SETUP Profiles

	Read	Create	Edit	Delete	View All	Modify All
Contact Point Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>
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"/>

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

Custom Object Permissions

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

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2F%3FretURL%3D%2F00e5j0...

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SETUP Profiles

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

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

Obscure secret answers for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

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Custom Object Permissions

	Data Access					Object Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Link	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Session Settings

Session Timeout 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

Obscure secret answer for password: ☐

Requires a minimum 1 day password: ☐

Don't immediately expire links in target password emails: ☐

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Users

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 Edit Create New View

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adanna Diba	adanna	test_diba_pas_b0f6b7b0uk_bz0r0p0k000_3g0f0v0w0m_h43k0z0f0m0a0@gmail.com		<input checked="" type="checkbox"/>	Utils User
<input type="checkbox"/> Edit R0R	Chatter Expert	Chatter	chatter-0005000000b00k0e0b00f0m0p0k0a0chatter@salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Ellington Amelia	elli	amelia.ellington.1.48k0p0000h_000v0p0u0v0h_1nb0d0m0v0h0e0_0p0c0t1.d0lv@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit R0R	S. GORAL	SS	ssg200@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit R0R	User Integration	integ	integration0005000000b00k0e0b00f0m0p0k0a0chatter@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit R0R	User Security	sec	insight00security@0005000000b00k0e0b00f0m0p0k0a0chatter@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

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- Apps

Search Setup

Users

New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only) ☐

High Contrast Palette on Charts ☐

Load Lightning Pages While Scrolling ☒

Debug Mode ☐

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Users

New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only) ☐

High Contrast Palette on Charts ☐

Load Lightning Pages While Scrolling ☒

Debug Mode ☐

Screenshot of the Salesforce Setup page for User Management. The browser tabs include WhatsApp, Salesforce Developer, YouTube, Object Manager, Users | Salesforce, and Downloads. The address bar shows the URL: artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j0000A4LxGN%3FnoRedirect%3D11626isUserEntryO...

The left sidebar shows the Setup menu with options like 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 PLATFORM TOOLS.

The main content area displays the "Users" section for the user "sowmiya bala". The user details include:

- Name: sowmiya bala
- Alias: sbala
- Email: 2520cse17a@knot.ac.in (Verify)
- Username: 2521t@knot.ac.in
- Nickname: User16951677128256422616
- Title: worker
- Company: knot bank
- Department
- Division
- Address
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English
- Delegated Approver
- Manager
- Receive Approval Request Emails: Only if I am an approver
- Federation ID
- App Registrations: One-Time Password Authenticator
- App Registration: Salesforce Authenticator

The right sidebar shows the "User Profile" section with various roles and permissions, including:

- Role: Salesforce Platform
- User License: Platform
- Profile: Platform
- Active: ☒
- Marketing User: ☐
- Offline User: ☐
- Knowledge User: ☐
- Flow User: ☐
- Service Cloud User: ☐
- Site.com Contributor User: ☐
- Site.com Publisher User: ☐
- WDC User: ☐
- Mobile Push Registrations: ☒
- Data.com User Type: ☐
- Accessibility Mode (Classic Only): ☐
- Debug Mode: ☐
- High-Contrast Palette on Charts: ☐
- Load Lightning Pages While Scrolling: ☒
- Salesforce CRM Content User: ☒

Screenshot of a Gmail inbox showing an email from support@salesforce.com. The browser tabs include WhatsApp, Salesforce Dev, YouTube, Object Manager, Users | Salesforce, Downloads, Welcome to Salesforce, and Reset Password. The address bar shows the URL: [mail.google.com/mail/u/0/#inbox/FMfopGtsStlSsqKQzCghDnsOxvI](mailto:support@salesforce.com)

The email content includes the Salesforce logo and the text:

Welcome to Salesforce!

Click below to verify your account.

[Verify Account](#)

To easily log in later, save this URL:

<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>

Username: 2521t@knot.ac.in

Again, welcome to Salesforce!

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artificialintelligence-d-dev-ed.develop.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp%26fromFrontdoor=1&satupid=Ch...

salesforce

Change Your Password

Enter a new password for **2k21it@kist.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:

Change Password

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

Login | Salesforce

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

salesforce

Username:

Password:


Log In

☐ Remember me

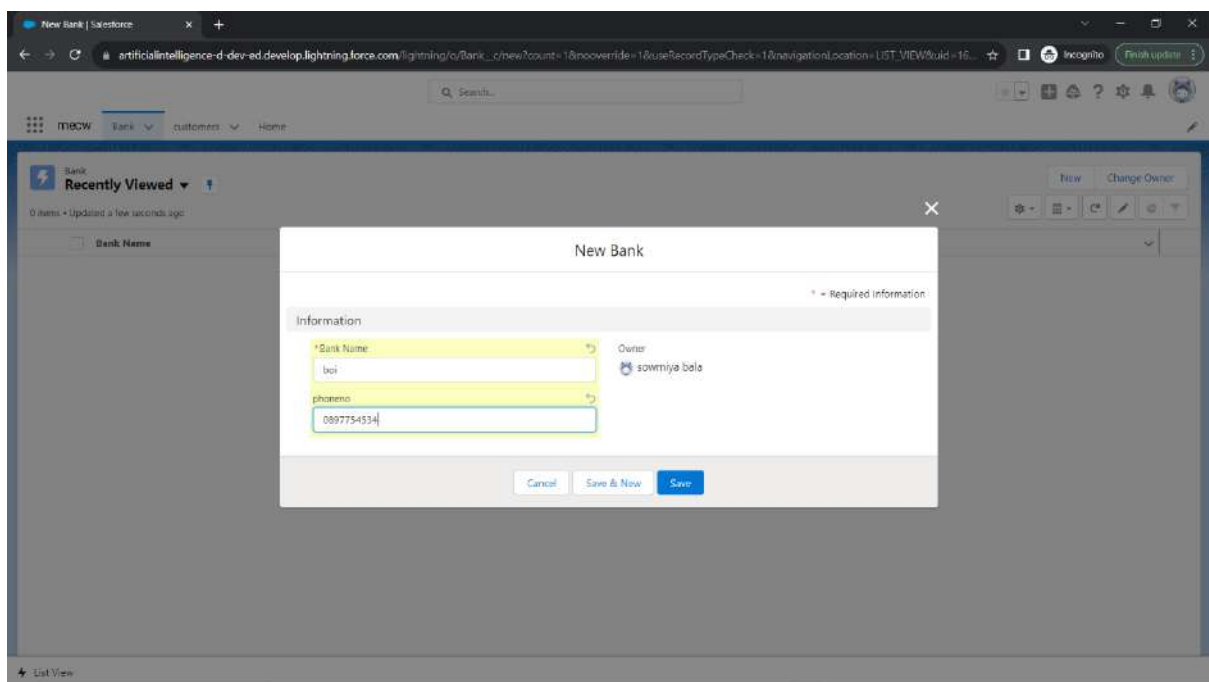
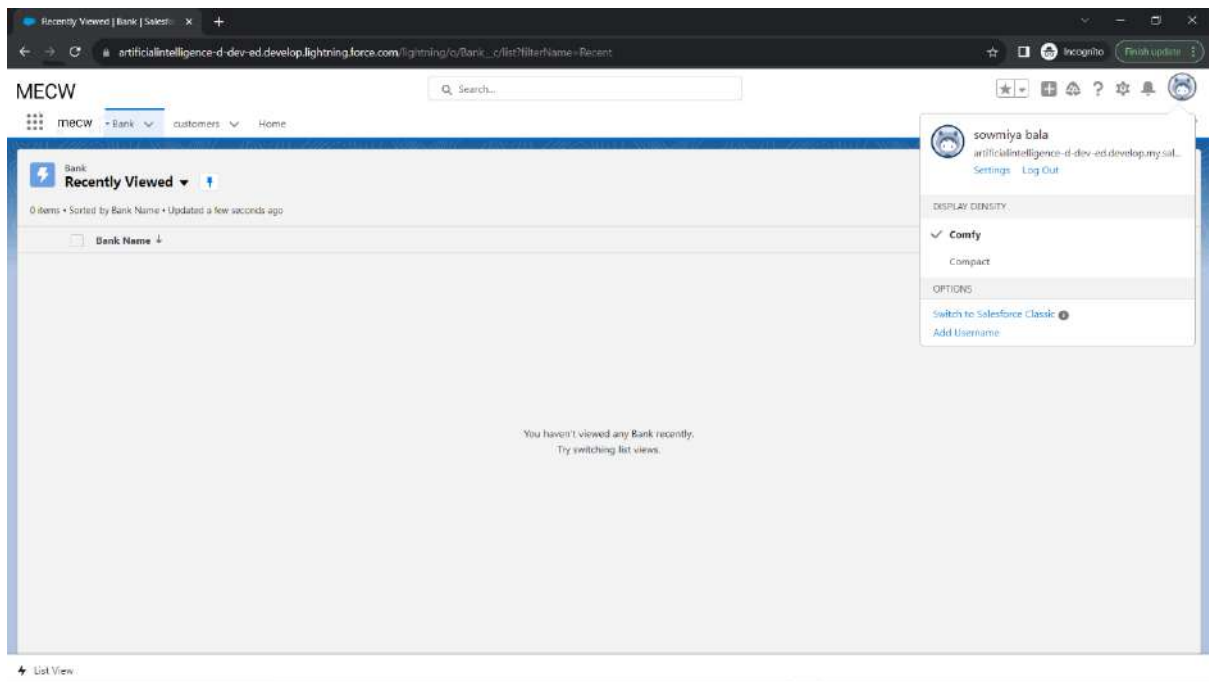
[Forgot Your Password?](#)

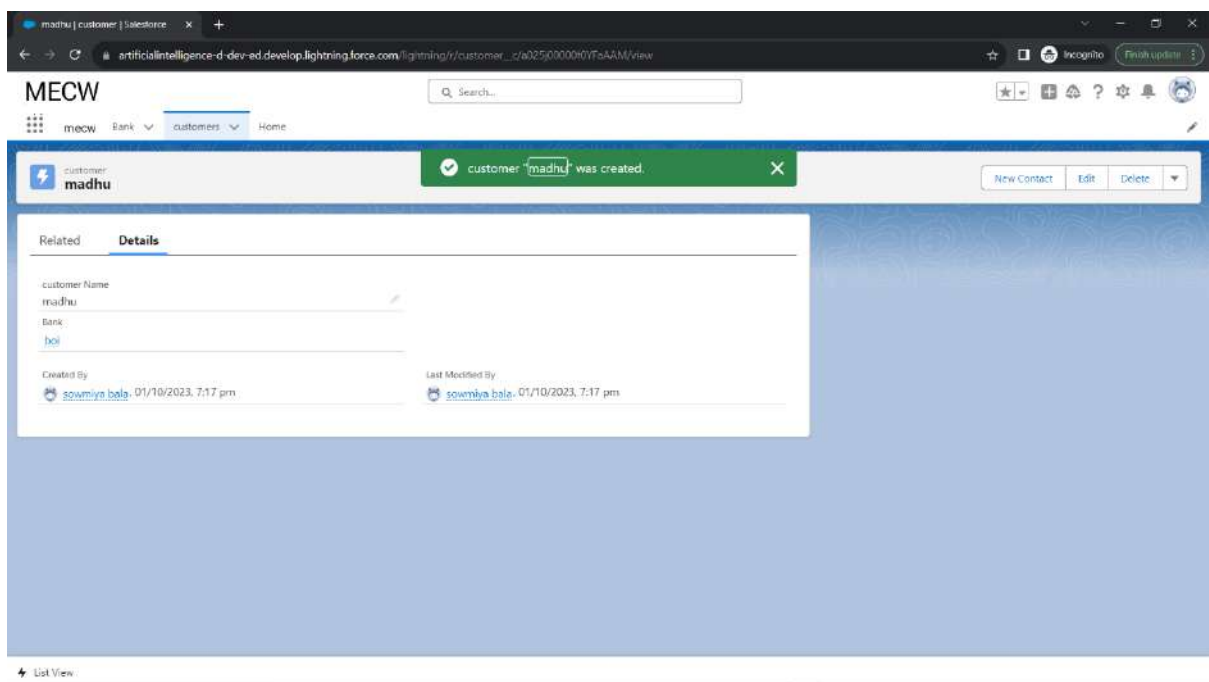
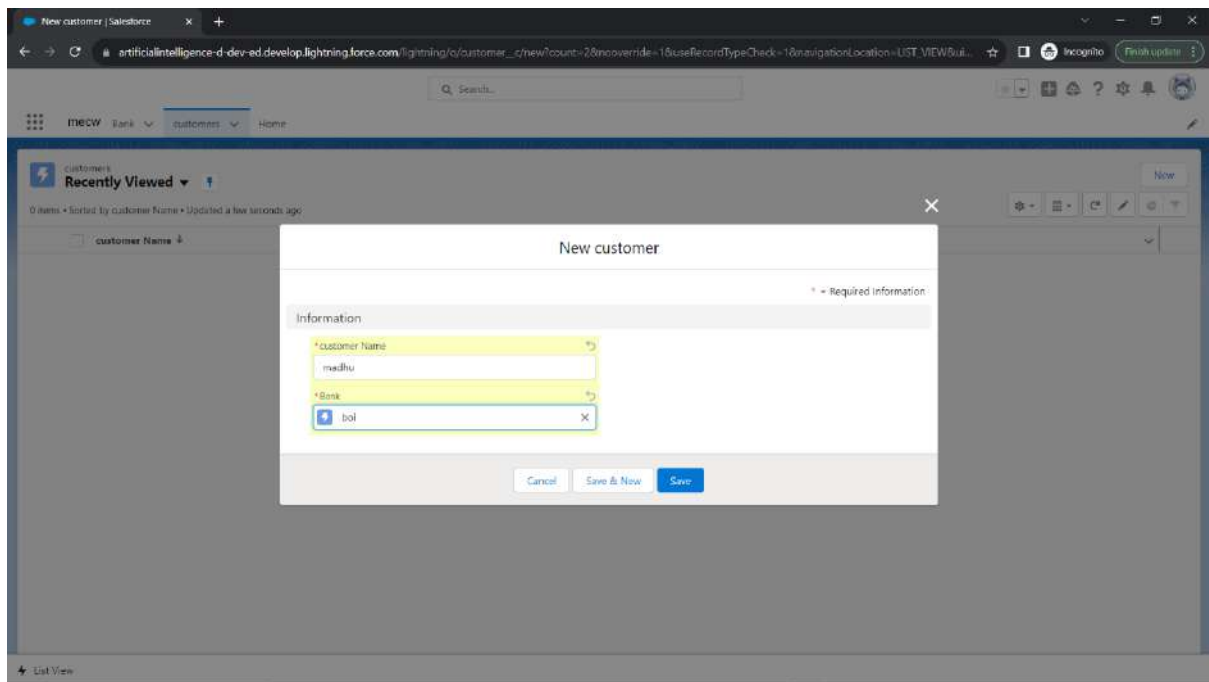
Join us for the future of trusted enterprise AI, streaming on Salesforce+.

WATCH ON DEMAND

 **AI Day**

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artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%2Fef%3FretURL%3D%2F52FO...

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Custom Object Permissions

	Basic Access				View Administration		Basic Access				View Administration	
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
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"/>
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"/>
Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%2Fef%3FretURL%3D%2F52FO...

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Custom Object Permissions

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

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

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

Save Save & New Cancel

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User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only)

High Contrast Palette on Charts

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User Edit Save Save & New Cancel

General Information

First Name madhu

Last Name b

Alias mb

Email 2620cse179@knot.ac.in

Username 2620cse179@knot.ac.in

Nickname User169616842426654192

Title worker

Company knot bank

Department Sales

Division

Role

User License Salesforce Platform

Profile salesmanage

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

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Mailing Address

Street

City

Zip/Postal Code

Status/Province

Country

Single Sign On Information

Federation ID

Locale Settings

Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Recycle Approval Request Emails Only if I am an approver

Generate new password and notify user immediately

Save Save & Now Cancel

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SETUP Users

Mailing Address

Street 4/104 - aryanpatnam, uhamasolapuram...

City SALEM

Zip/Postal Code 636308

Status/Province TAMIL NADU

Country

Single Sign On Information

Federation ID

Locale Settings

Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Recycle Approval Request Emails Only if I am an approver

Generate new password and notify user immediately

Save Save & Now Cancel

Setup Home Object Manager

Search Setup

user

Users

User Detail

Name: madhu b

Alias: mb

Email: 2k20cs17a@kiet.ac.in (madhu)

Username: 2k20cs17a@kiet.ac.in

Nickname: User16951684242865419206

Title: worker

Company: kiet bank

Department: Sales

Division:

Address: 4/154, arimmozaiyam, uttamasaparam, Parakkodu, Salem-636308, TAMIL NADU

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale: English (India)

Language: English

Manager:

Delegated Approver:

Receive Approval Request Emails: Only if I am an approver

Federation ID:

App Registration One-Time Password Authentication:

Role: Salesforce Platform

User License: salesmanage

Profile: Active

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Slack.com Publisher User: ☐

WDC User: ☐

Mobile Push Registrations: ☒

Data.com User Type: ☐

Accessibility Mode (Classic Only): ☐

Debug Mode: ☐

High-Contrast Palette on Charts: ☐

Load Lightning Pages While Scrolling: ☒

mail.google.com/mail/u/0/#inbox/FMfcgGtsStlSsqKQzCQhbDnsOxvI

Search in mail

Active

KNOWLEDGE

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:

<https://artificialintelligence-d-dev-ed.developo.my.salesforce.com>

Username: 2k20cs17a@kiet.ac.in

Again, welcome to Salesforce!

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Salesforce.com, inc. The Landmark at One Market, Suite 300, San Francisco, CA, 94105, United States

Reply Forward

Change Your Password | Salesforce

artificialintelligence-d-dev-ed.develop.my.salesforce.com/.../system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp%26fromFrontdoor=1&stupid=ChangePa...

salesforce

Change Your Password

Enter a new password for **2k20cst@klot.ac.in**. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password:

* Confirm New Password:

Security Question:
In what city were you born?

* Answer:

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.../list?filterName=Recent

MECW

MECW Bank customers Home

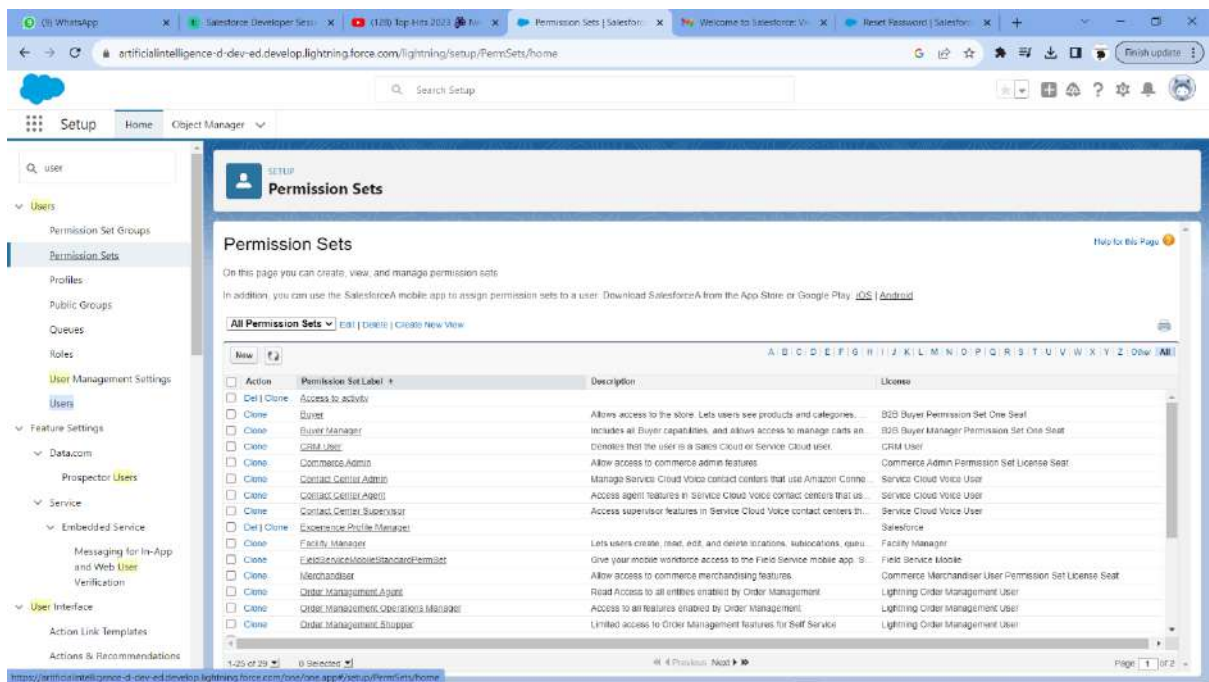
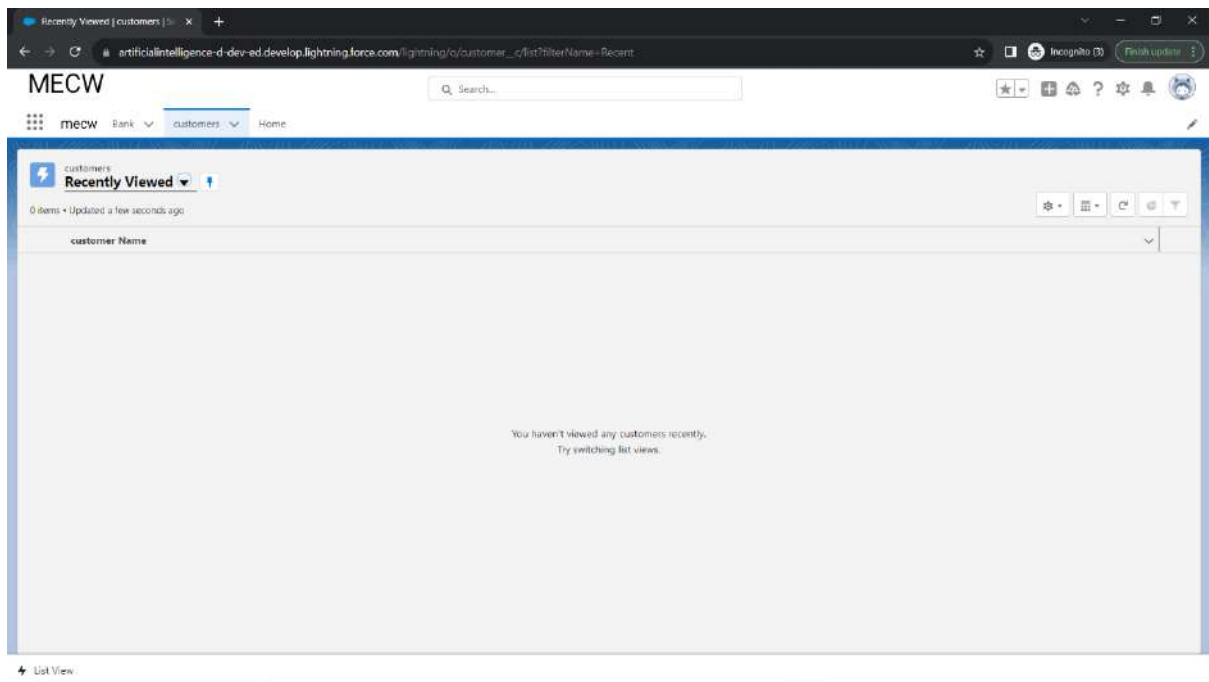
Search...

Bank: Recently Viewed

0 items • Updated a few seconds ago

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

List View



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 I-Jser A and I-Jser 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 IJser 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:

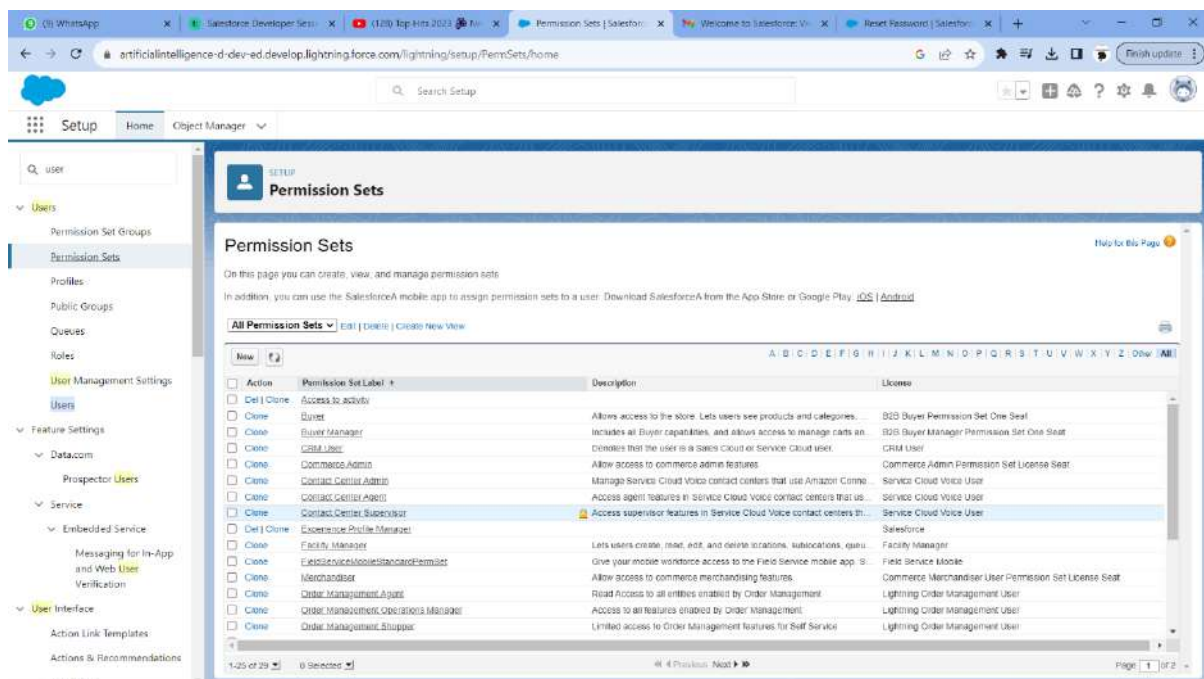
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

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. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Datacom, Prospector Users, Service, Embedded Service, Messaging for In-App and Web User, Verification, User Interface, Action Link Templates, Actions & Recommendations, and App Menu. The main content area is titled 'Permission Sets' and includes a search bar, a 'New' button, and a table of existing permission sets. The table has columns for Action, Permission Set Label, Description, and License. The 'Contact Center Supervisor' permission set is highlighted.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del Clone	Access to activity		
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categories...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage parts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Provides that the user is a sales cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Conne...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/> Del Clone	Experience Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, geo...	Facility Manager
<input type="checkbox"/> Clone	Field Service Location Scheduler	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/> Clone	Merchadiser	Allow access to commerce merchandising features.	Commerce Merchadiser User Permission Set License Seat
<input type="checkbox"/> Clone	Order Management Agent	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Operations Manager	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Shopper	Limited access to Order Management features for Self Service.	Lightning Order Management User

Setup Home Object Manager

Search Setup

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User
- Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

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

Save Cancel

Setup Home Object Manager

Search Setup

user

Users

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

Feature Settings

- Data.com
- Prospector Users
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- Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- 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

Save Cancel

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu

Permission Set

salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name
License	salesmanager
Session Activation Required	Namespace Prefix
Last Modified By: GOPAL S. 01/10/2023, 7:29 pm	Created By: GOPAL S. 01/10/2023, 7:29 pm

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

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform [Learn More](#)

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User
- User Interface
- Action Link Templates
- Actions & Recommendations

Permission Set

salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	—
AI Insights Reasons	No Access	—	—
AI Recent Insights	No Access	—	—
Alternative Payroll Methods	No Access	27	—
API Analytics Event Stores	No Access	14	—
App Analytics Query Requests	No Access	—	—
Application Usage Assignments	No Access	—	—
Appointment Categories	No Access	9	—
Appointment Invitations	No Access	17	—
Appointment Invites	—	4	—
Appointment Schedule Assignments	No Access	—	—
Appointment Schedule Logs	No Access	—	—
Appointment Topic Time Slots	No Access	6	—
Asset Actions	No Access	50	—
Asset Action Sources	No Access	18	—
Asset Relationships	—	10	—
Assets	No Access	42	—
Asset State Periods	No Access	11	—

Setup Home Object Manager

Search Setup

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
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Feature Settings

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- Verification

User Interface

- Action Link Templates
- Actions & Recommendations

Permission Set: salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank Edit

Tab Settings

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

Object Permissions

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

Field Permissions

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

https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55000000Phok%3F%3DEntityPermissions%26o%3D...

Setup Home Object Manager

Search Setup

user

Users

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

Feature Settings

- Data.com
- Prospector Users
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User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Permission Set: salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank Save Cancel

Tab Settings

Available	Visible
<input type="checkbox"/>	<input 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 type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>

Setup Home Object Manager

Search Setup

user

Users

- Permission Set Groups
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Feature Settings

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User Interface

- Action Link Templates
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salesmanager

Current Assignments

Add Assignment

No assignments defined.

Setup Home Object Manager

Search Setup

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
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- User Management Settings
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Select Users to Assign

All Users

1 item selected

Search this list...

	Full Name	All...	Username	Role	Ac...	Profile
<input type="checkbox"/>	Amelia Ellington	aelli	amelia.ellington.146kxq8oodh.d6cxpdcu4whunbdammhwhqwgucprtdalv@gmail.com	✓		Force.com - App Subscription User
<input type="checkbox"/>	Chatter Expert	Chatter	chatty60d50000bckkeab.3c0bfwmpgkx@chatter.salesforce.com	✓		Chatter Free User
<input type="checkbox"/>	Diya Adanna	dsidan	test_diya_pas4wlbjyb9wll.tzgrgobkpx.3gltokovzuns.N43biczwekcs@gmail.com	✓		UIMS User
<input type="checkbox"/>	GOPAL S	GS	kiots20@gmail.com	✓		System Administrator
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000bckkeab.com	✓		Analytics Cloud Integration User
<input checked="" type="checkbox"/>	madhu b	mb	2k20ctch@idot.ac.in	✓		salesmanager
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000bckkeab.com	✓		Analytics Cloud Security User
<input type="checkbox"/>	sowmiya bala	sbala	2k21M@idot.ac.in	✓		Manager

Cancel Next

Salesforce Developer Setup: Select an Expiration Option For Assigned Users

☒ No expiration date

☐ 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

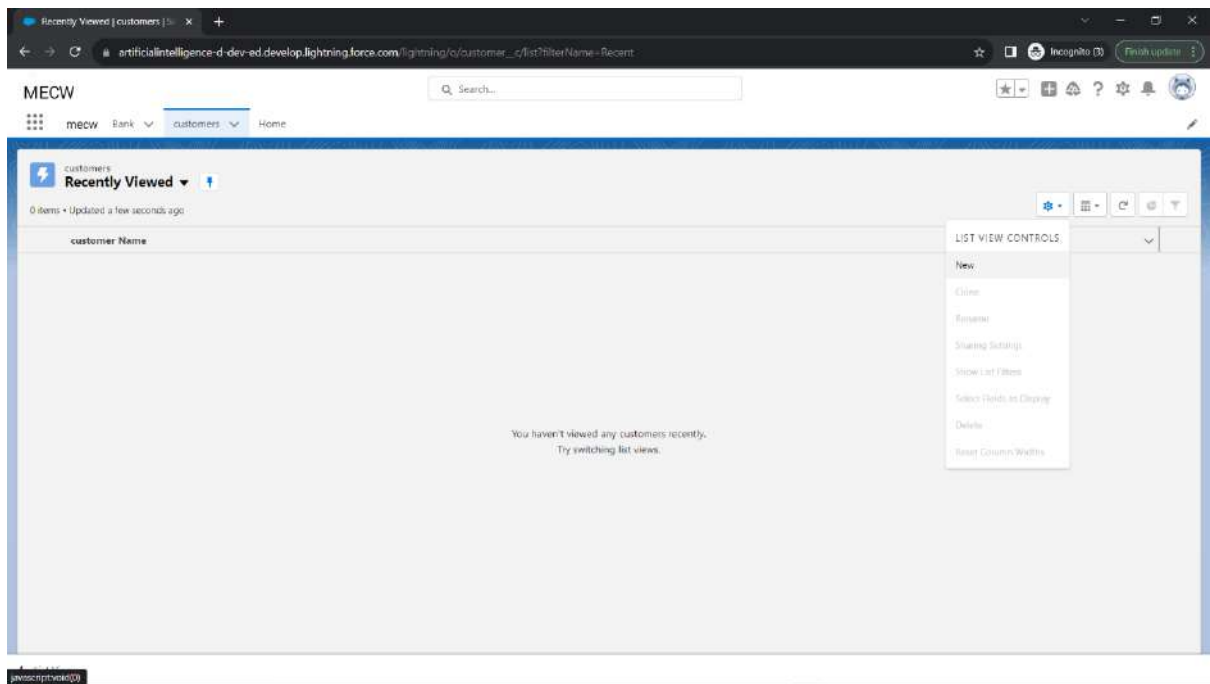
Buttons: Cancel, Back, Assign

Salesforce Developer Setup: Assignment Summary

PERMISSION SET: SALESMAAN 1 assignments were successful.

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

Buttons: Done

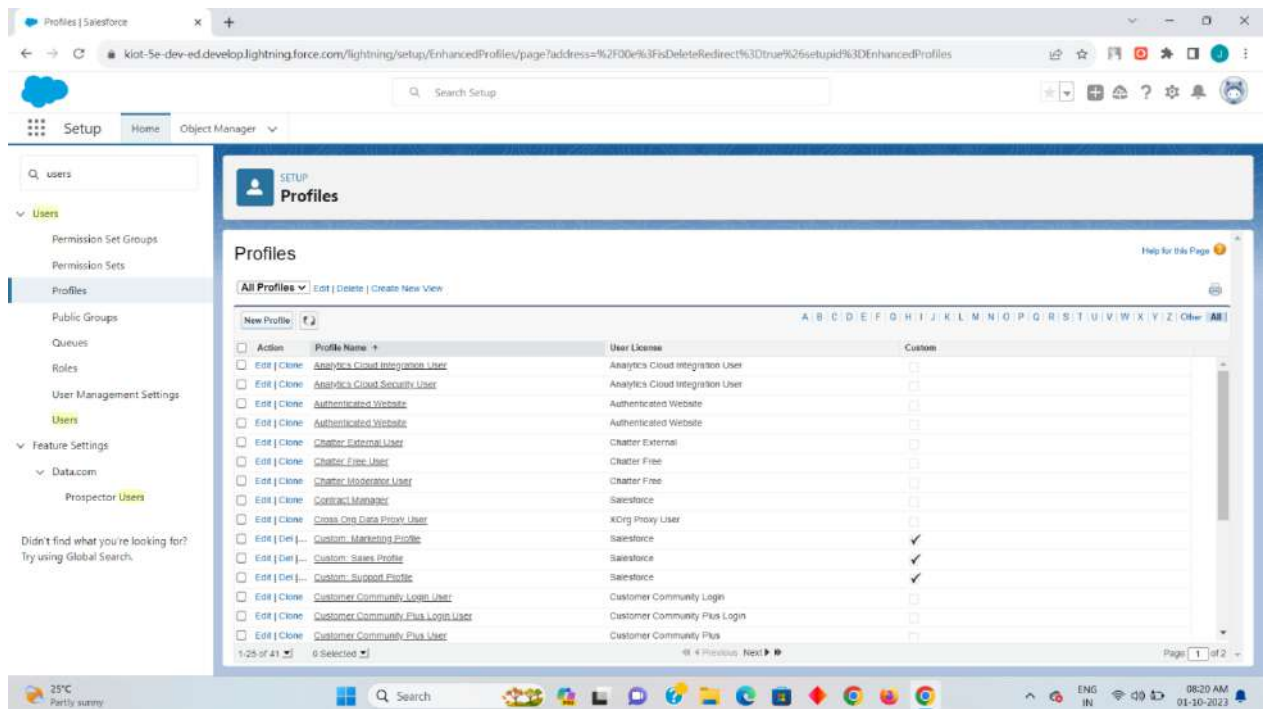


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

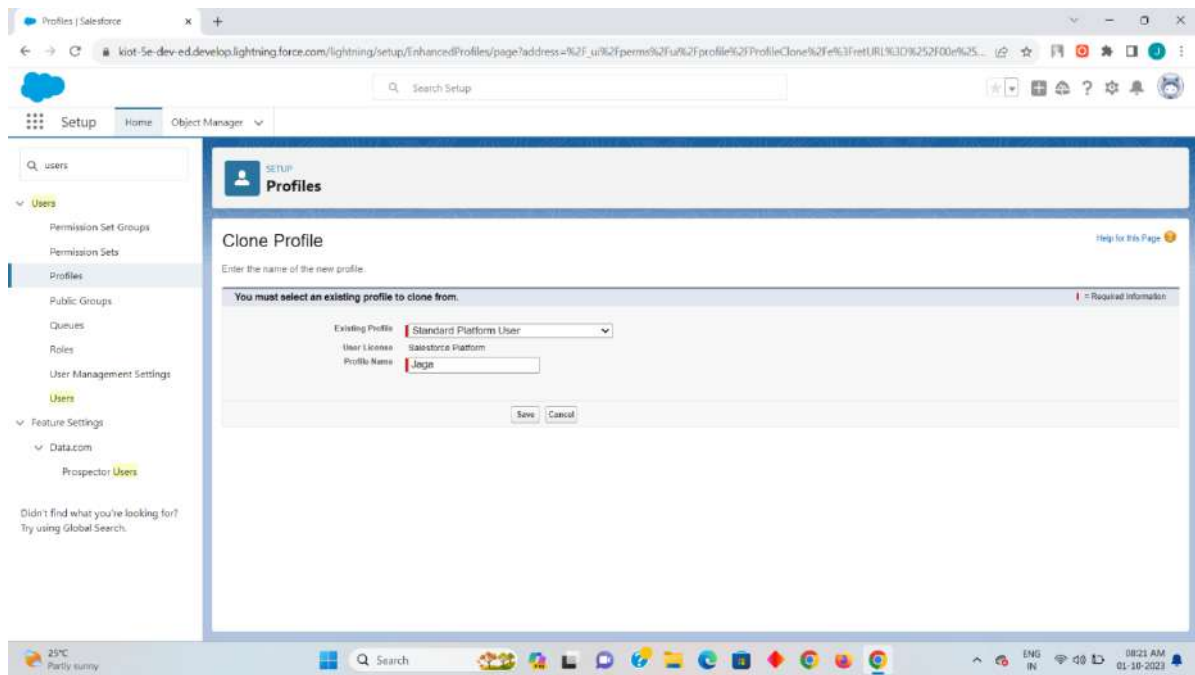
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

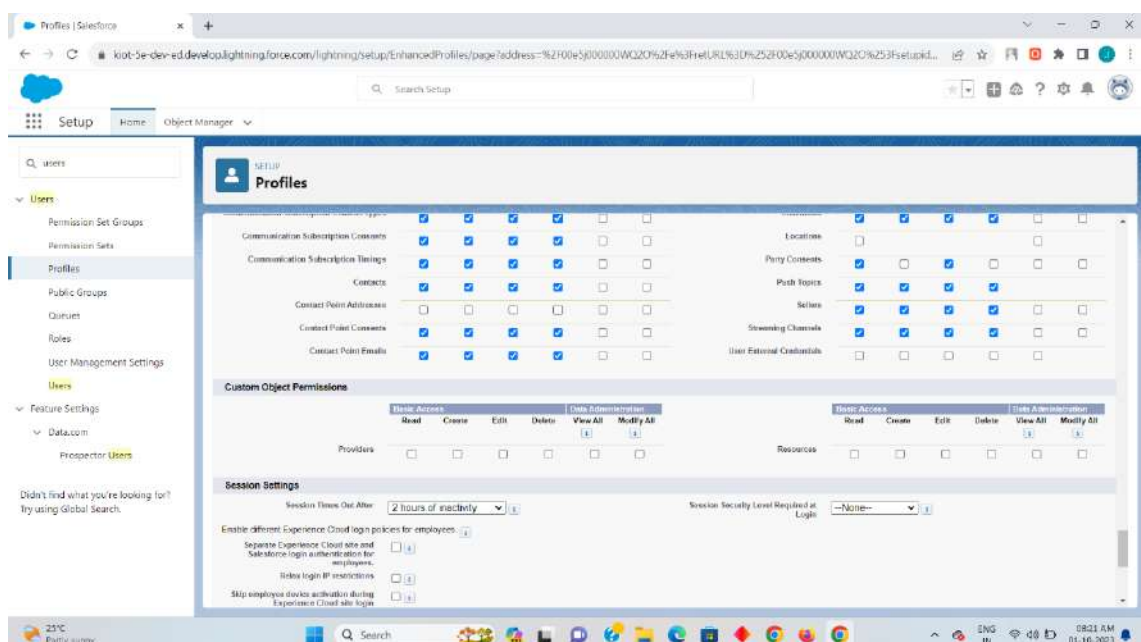
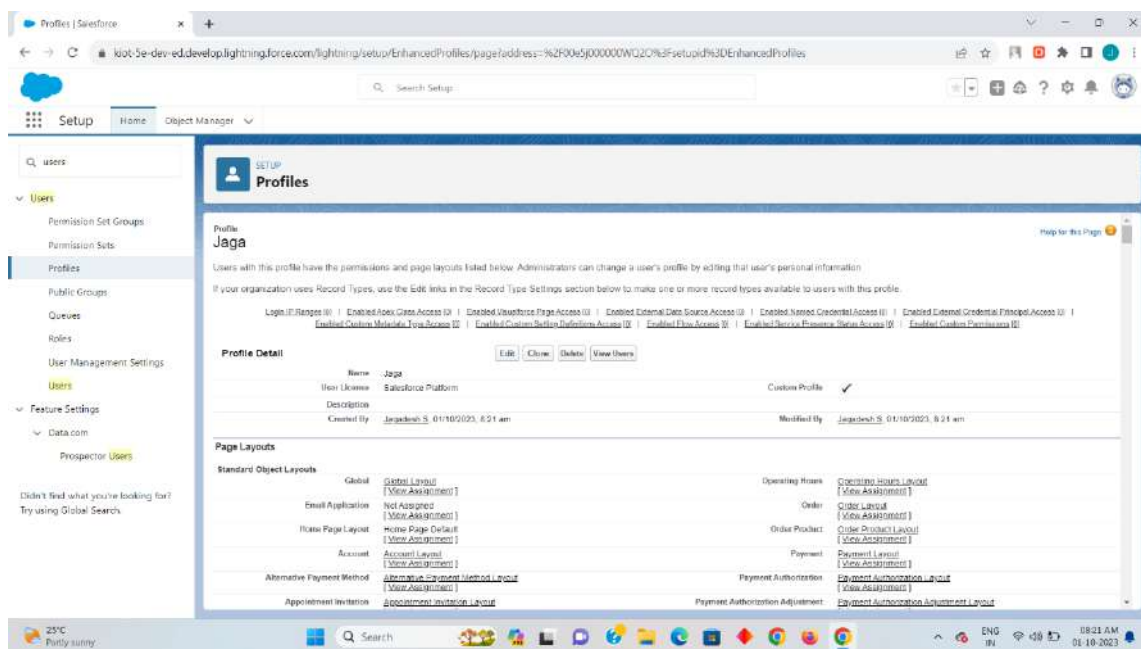
Click on the new to create a new profile along with the label and Api



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

Search Setup

Setup Home Object Manager

users

Users

- 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

<input checked="" type="checkbox"/>	<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"/>	<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"/>
-------------------------------------	-------------------------------------	-------------------------------------	-------------------------------------	--------------------------	--------------------------	--------------------------

Locations

<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	-------------------------------------	-------------------------------------	-------------------------------------	--------------------------	--------------------------	--------------------------

Party Consents

<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	-------------------------------------	--------------------------	--------------------------	--------------------------	--------------------------

Push Topics

<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"/>
-------------------------------------	-------------------------------------	-------------------------------------	-------------------------------------	--------------------------	--------------------------	--------------------------

Sellers

<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"/>
-------------------------------------	-------------------------------------	-------------------------------------	-------------------------------------	--------------------------	--------------------------	--------------------------

Streaming Channels

<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"/>
-------------------------------------	-------------------------------------	-------------------------------------	-------------------------------------	--------------------------	--------------------------	--------------------------

User External Credentials

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------	--------------------------	--------------------------	--------------------------

Custom Object Permissions

	UNITED STATES				UNITED KINGDOM		UNITED STATES					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Resources	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						

Session Settings

Session Times Out After:

Session Security Level Required at Login:

Enable different Experience Cloud login policies for employees: ☐

Separate Experience Cloud site and Salesforce login authentication for employees: ☐

Rules login IP restrictions: ☐

Skip employee device activation during Experience Cloud site login: ☐

Profiles | Salesforce

Search Setup

Setup Home Object Manager

users

Users

- 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

Profile FID: Jaga

Set the permissions and page layouts for this profile.

Profile Edit

Name:

User License:

Description:

Custom Profile: ☒

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Analytics)	<input type="checkbox"/>	<input type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
Flow App (Flow_App)	<input checked="" type="checkbox"/>	<input type="radio"/>			

Service Provider Access

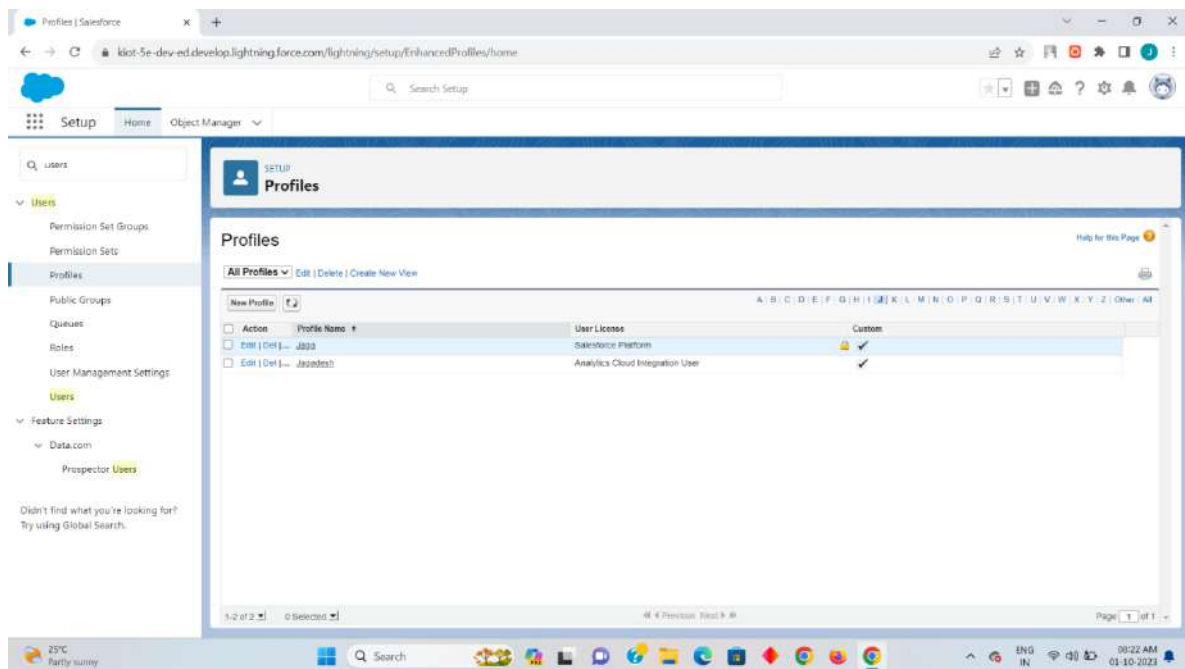
☐ Overwrite users' personal tab customizations

Tab Settings

☐ Overwrite users' personal tab customizations

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

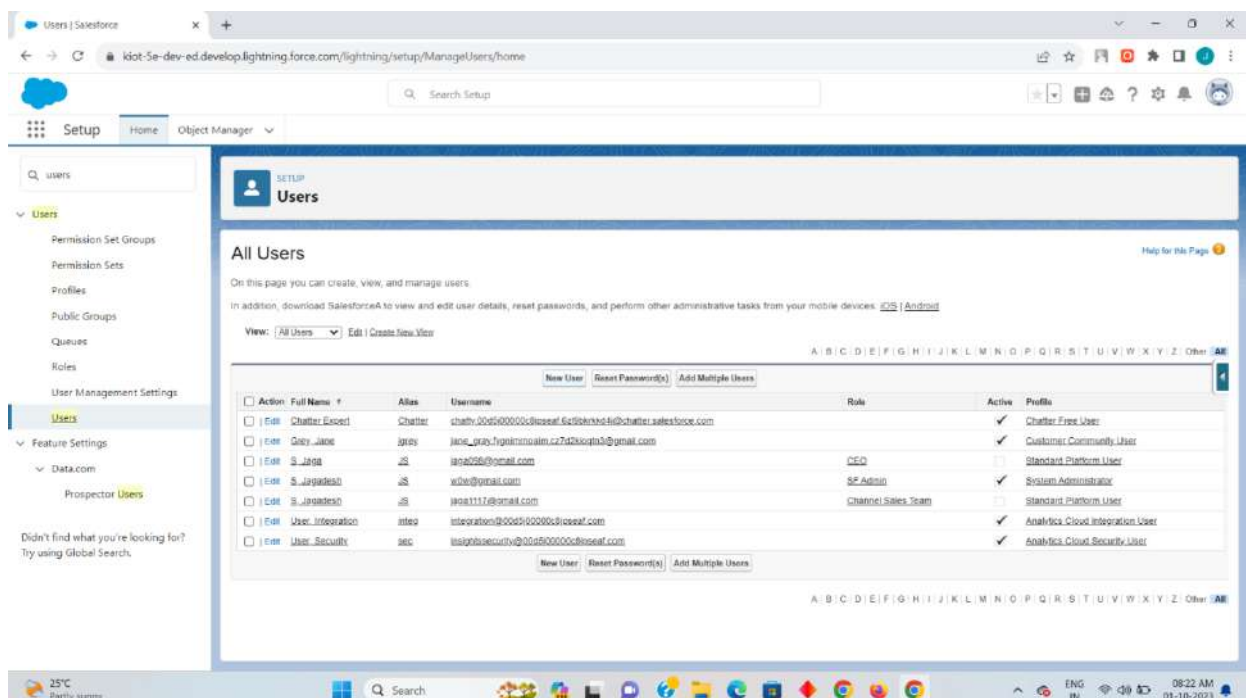


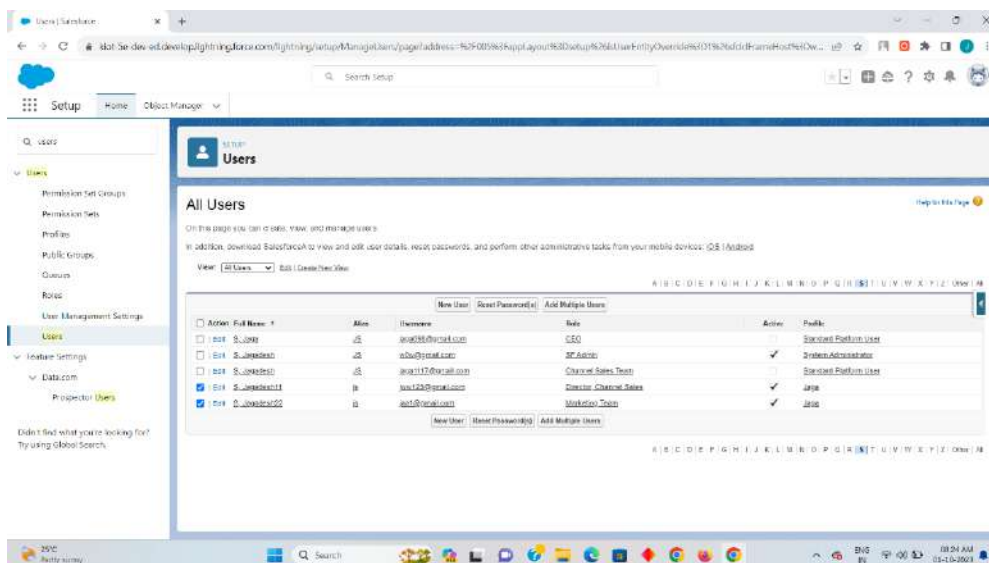
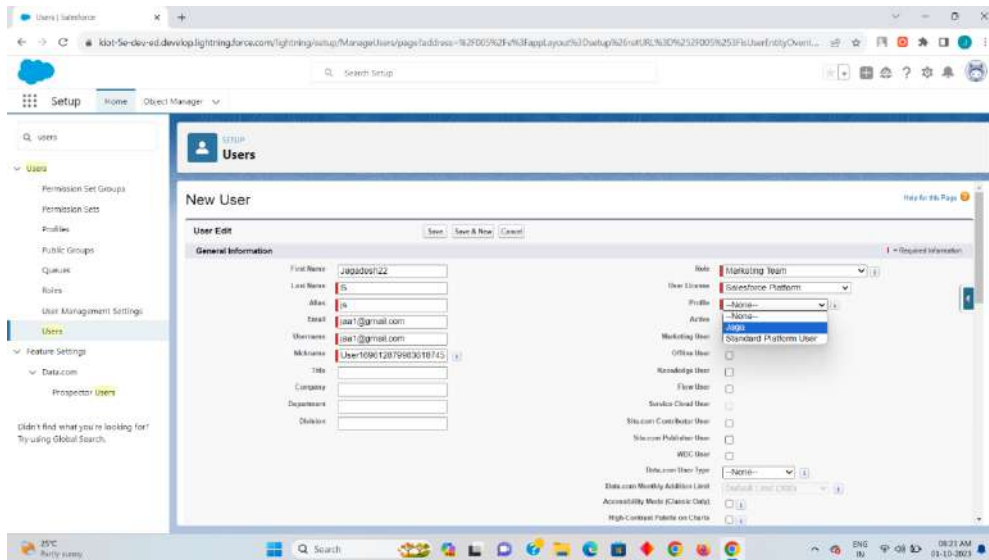
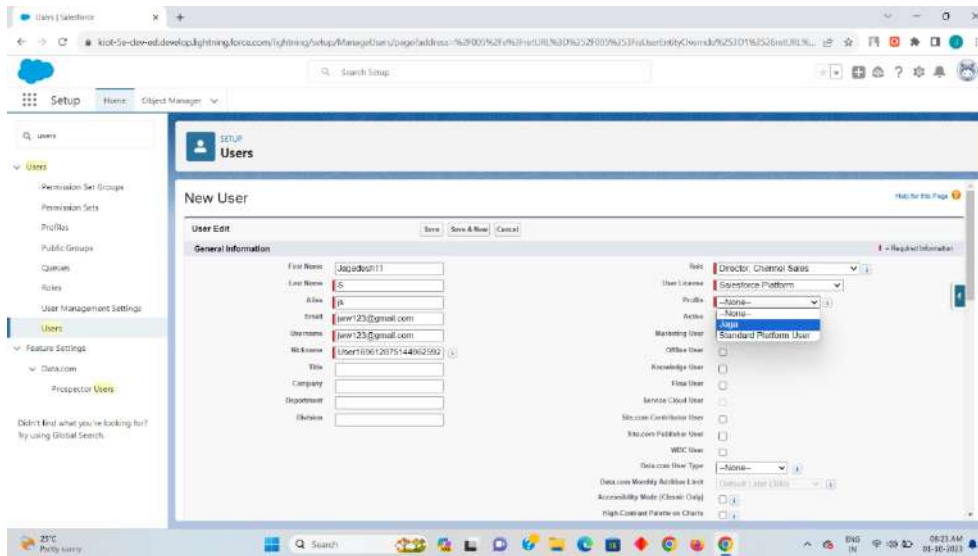
The screenshot shows the Salesforce Setup page for Profiles. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, and Data.com. The main content area displays the Profiles section with a table of profiles.

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Jaga	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Jagadash	Analytics Cloud Integration User	<input checked="" type="checkbox"/>

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 been created with alternate name but with the same user profile and once the two user are create click on save.





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 user as been created with the profile 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

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

Search Setup

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

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

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.

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories, includes all Buyer Organization, and allows access to manage calls at.	EDI Buyer Permission Set One Star
<input type="checkbox"/>	Buyer Manager	Limits that the user is a Buyer Cloud or Service Cloud user.	EDI Buyer Manager Permission Set One Star
<input type="checkbox"/>	CRM User		CRM User
<input type="checkbox"/>	Commerce Admin	Allows access to commerce admin features.	Commerce Admin Permission Set License Star
<input type="checkbox"/>	Contact Center Access	Manage Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use.	Service Cloud Voice User
<input type="checkbox"/>	Commerce Profile Manager	Lets users create, read, edit, and delete locations, subscriptions, and.	Profile Manager
<input type="checkbox"/>	Fields Manager	Give your mobile workforce access to the First Service mobile app. It.	First Service Mobile
<input type="checkbox"/>	Field Service Manager		Field Service Manager
<input type="checkbox"/>	Merchandise	Allows access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Star
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Organization Manager	Access to all features enabled by Order Management.	Lightning Order Management User

1-25 of 30 | 0 Selected | Previous | Next

Page 1 of 2

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2Fnew/PermissionSet.apex

Search Setup

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

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

Permission Sets

Create

Save Cancel

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

Save Cancel

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0F55J000000Pta%3Fsf%3D%3CEntityPermissions

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

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

Permission Sets

permission12

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview

Owner	Admin	API Name	permission12
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	ajagachan@_ 01/10/2023, 8:24 am
Last Modified By	ajagachan@_ 01/10/2023, 9:24:59		

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 [field 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

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0F55J000000Pta%3Fsf%3D%3CEntityPermissions

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

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

Permission Sets

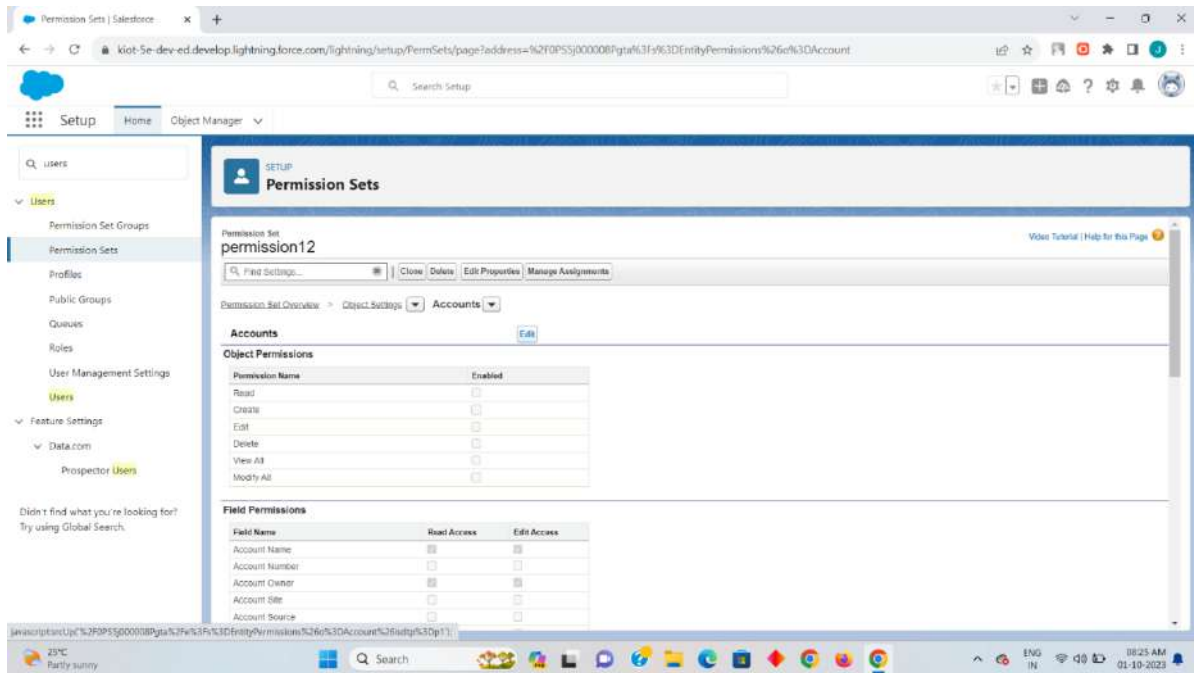
permission12

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings

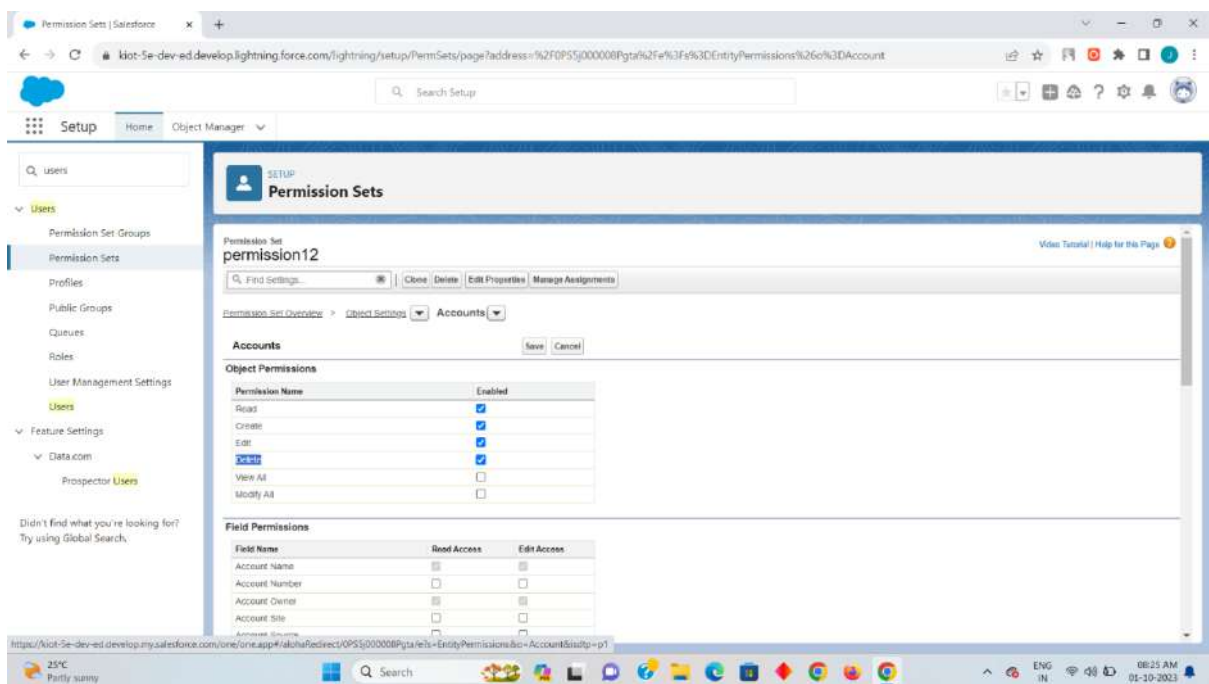
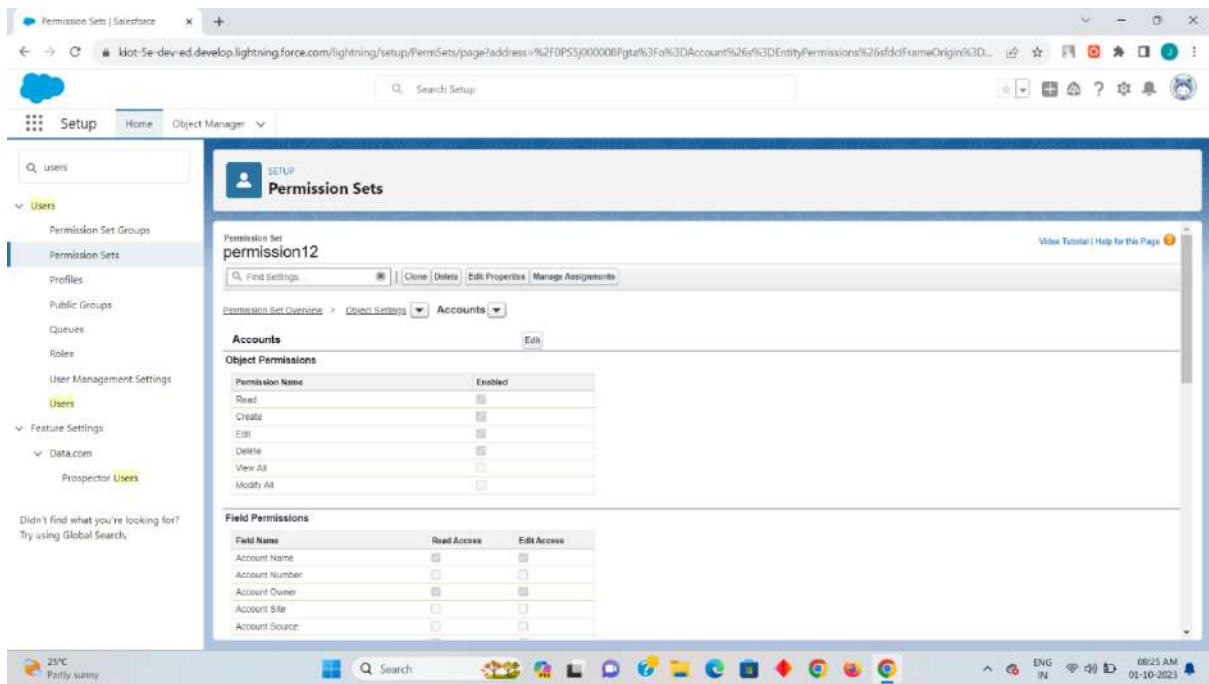
Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account	No Access	9	---
Account Contacts	No Access	44	---
Account Relationships	No Access	---	---
AI Record Insights	No Access	---	---
Alternative Payment Methods	No Access	27	---
API Automatic Event Status	No Access	14	---
App Analytics Query Requests	No Access	---	---
Application Usage Assignments	No Access	---	---
Appointment Categories	No Access	3	---
Appointment Invitations	No Access	17	---
Appointment Invites	---	4	---
Appointment Schedule Appointments	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	---



Step 7:

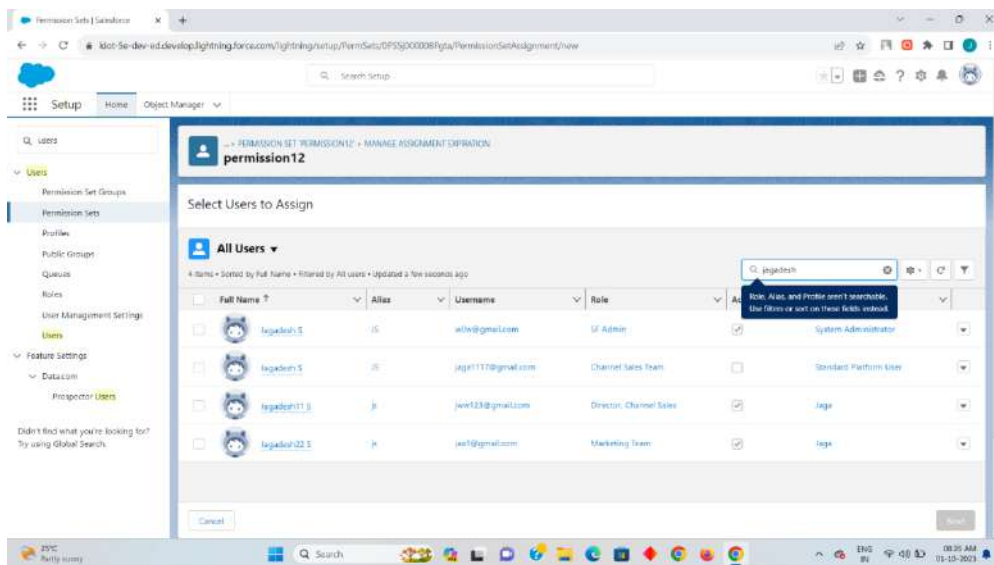
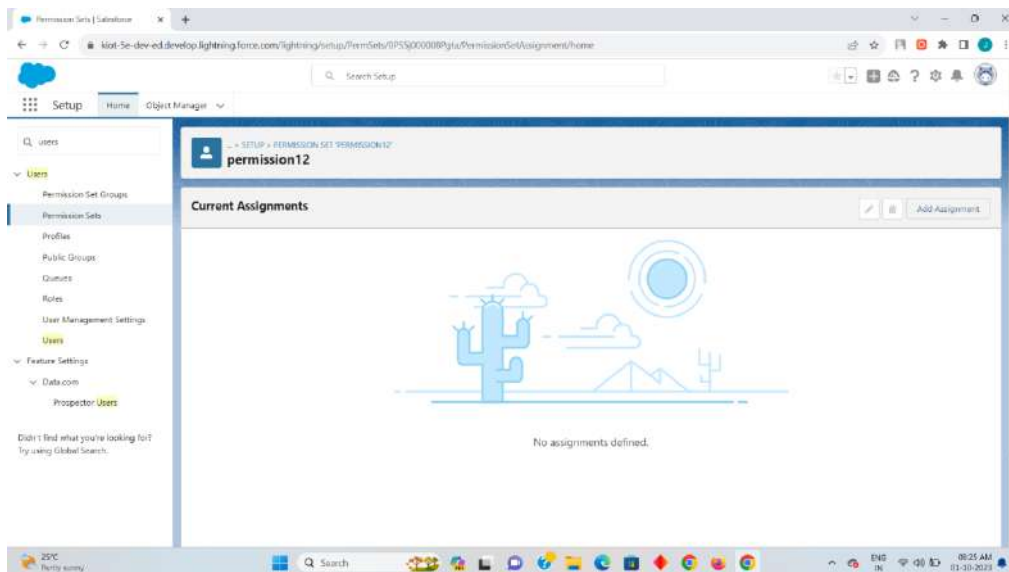
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

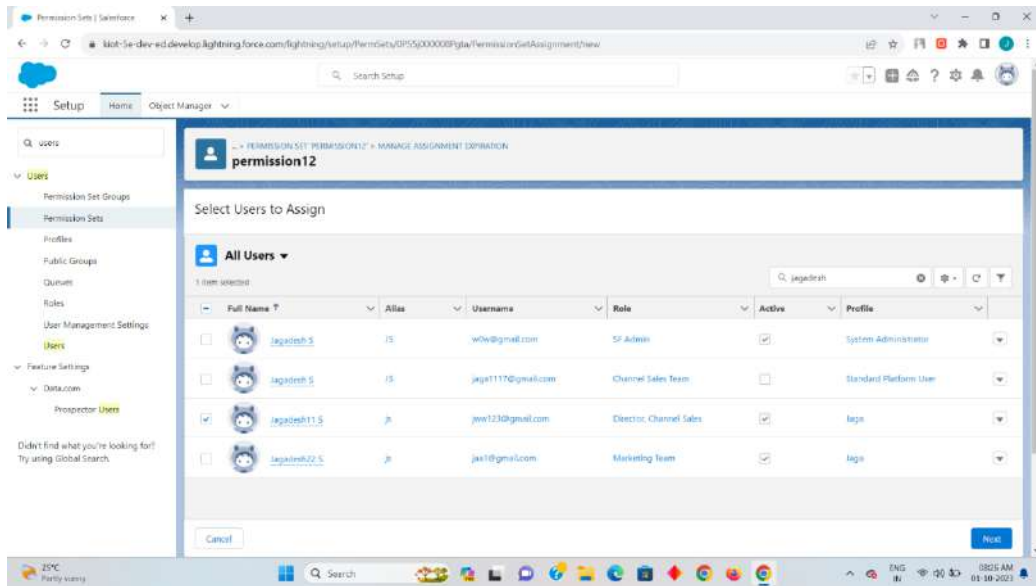


Step 8

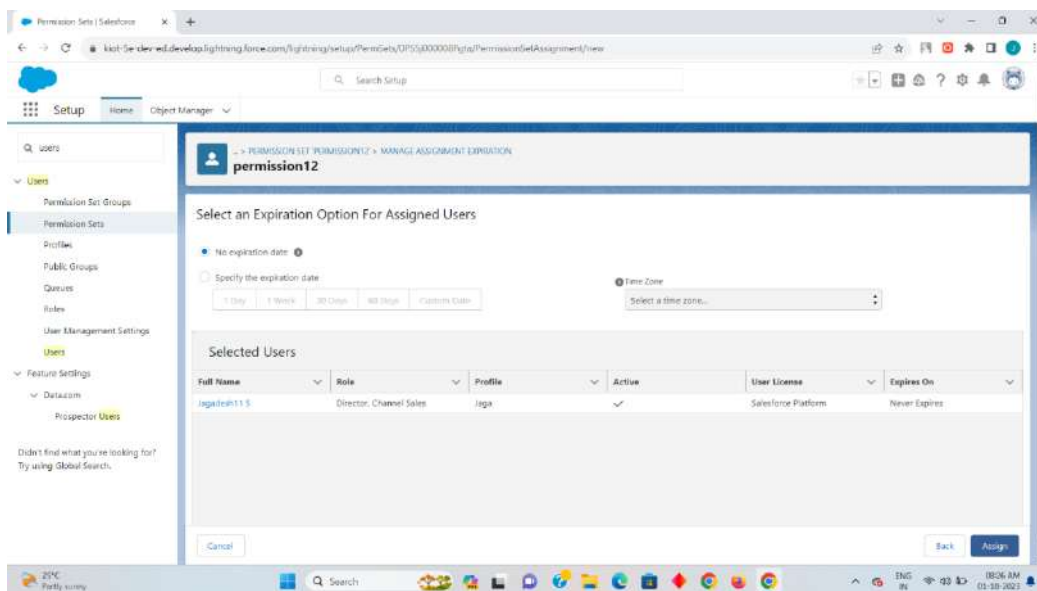
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific

selected user can have a special access as delete on it.

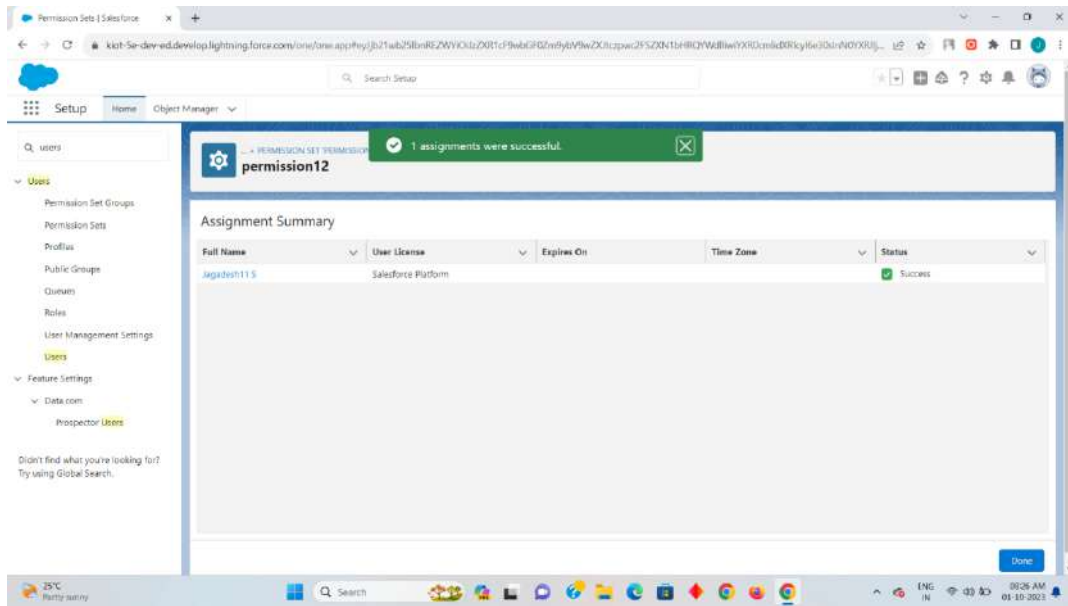




Click on next.



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

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

Fields & Relationships

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

8 Items, Sorted by

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Comment	Comment__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(51)		
Owner	OwnerId	Lookup(User,Group)		✓
Rating	Rating__c	Picklist		
Survey Result Name	Name	Auto Number		✓

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.

The screenshot shows the 'Email Template - Thank You Email - Survey' interface. It has tabs for 'Details' and 'Related'. The 'Details' tab is active, showing 'Information' and 'Message Content' sections. The 'Information' section includes fields for 'Email Template Name' (Thank You Email - Survey), 'Description', 'Related Entity Type' (Survey Result), 'Folder' (Public Email Templates), and a checkbox for 'Made in Email Template Builder' (checked). The 'Message Content' section includes a 'Subject' field (Thank You For Completing Our Survey!), an 'Enhanced Letterhead' field, and an 'HTML Value' field. The HTML content is a thank-you message with a placeholder for the recipient's name. The 'Additional Information' section at the bottom shows 'Created By' (Rakesh Gupta, 12/21/2020, 4:23 PM) and 'Last Modified By' (Rakesh Gupta, 12/21/2020, 4:32 PM).

Email Template - Thank You Email - Survey

Edit in Builder Edit Clone

Details Related

Information

Email Template Name
Thank You Email - Survey

Description

Made in Email Template Builder
☒

Related Entity Type
Survey Result

Folder
Public Email Templates

Message Content

Subject
Thank You For Completing Our Survey!

Enhanced Letterhead

HTML Value

Hi {{{Survey_Result__c.Name__c}}},

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

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**.

Edit Email Alert

Survey - Thank You Email

Help for this Page

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit

Save Save & New Cancel

Edit Email Alert

= Required Information

Description

Survey - Thank You Email

Unique Name

Survey_Thank_You_Email

Object

Survey Result

Email Template

Thank You Email - Survey

Protected Component

☐

Recipient Type

Search: User for: Find

Recipients

Available Recipients

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

Add
Remove

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.

Save Save & New Cancel

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 * API Name

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

Set Field Values for the Survey Result

Field	Value
<input type="text" value="Comment__c"/>	<input type="text" value="A_a Comment X"/>
<input type="text" value="Email__c"/>	<input type="text" value="A_a Email > Value X"/>
<input type="text" value="Name__c"/>	<input type="text" value="{!Name.firstName} {!Name.lastName}"/>
<input type="text" value="Rating__c"/>	<input type="text" value="A_a Rating X"/>

[+ Add Field](#)

☐ 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.

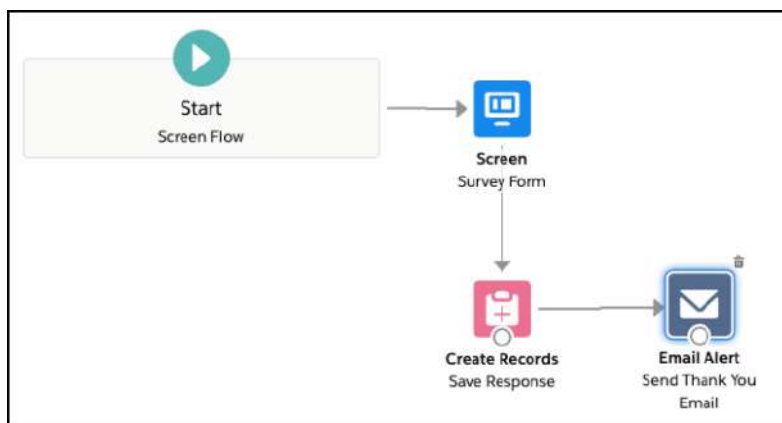
1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank**

You Email.

4. Clicks on the **Survey – Thank You Email** email alert.
5. Click **Done**.

The screenshot shows a configuration window titled "Edit 'Survey - Thank You Email' email alert". It contains a text area for a description, a "Set Input Values" section with a field for "Record ID" containing the value "{!Save_Response}", and "Cancel" and "Done" buttons at the bottom right.

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

Survey

* Flow API Name

Survey

Description

Hide Advanced

How to Run the Flow ⓘ

User or System Context—Depends on How Flow is Launched

* Type

Screen Flow

* API Version for Running the Flow

51

Interview Label ⓘ

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

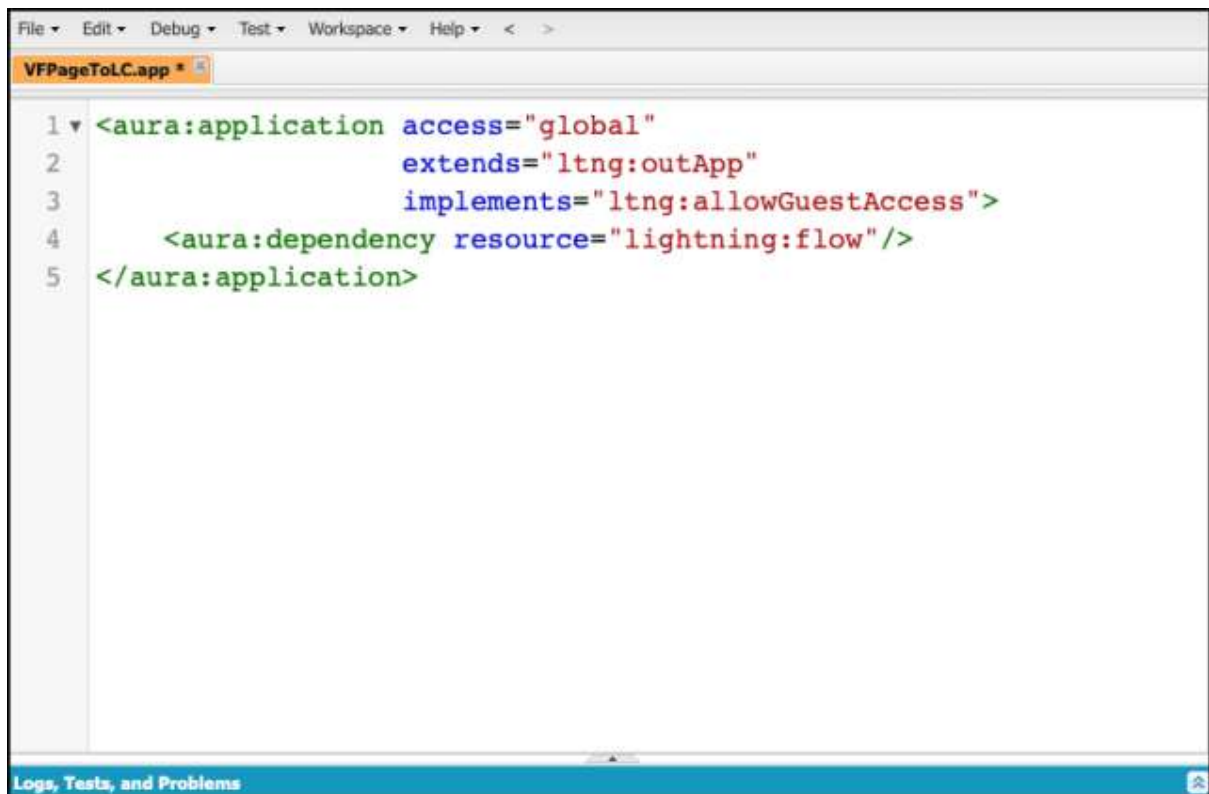
Cancel

Save

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 (VFPageToLC)** 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.



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

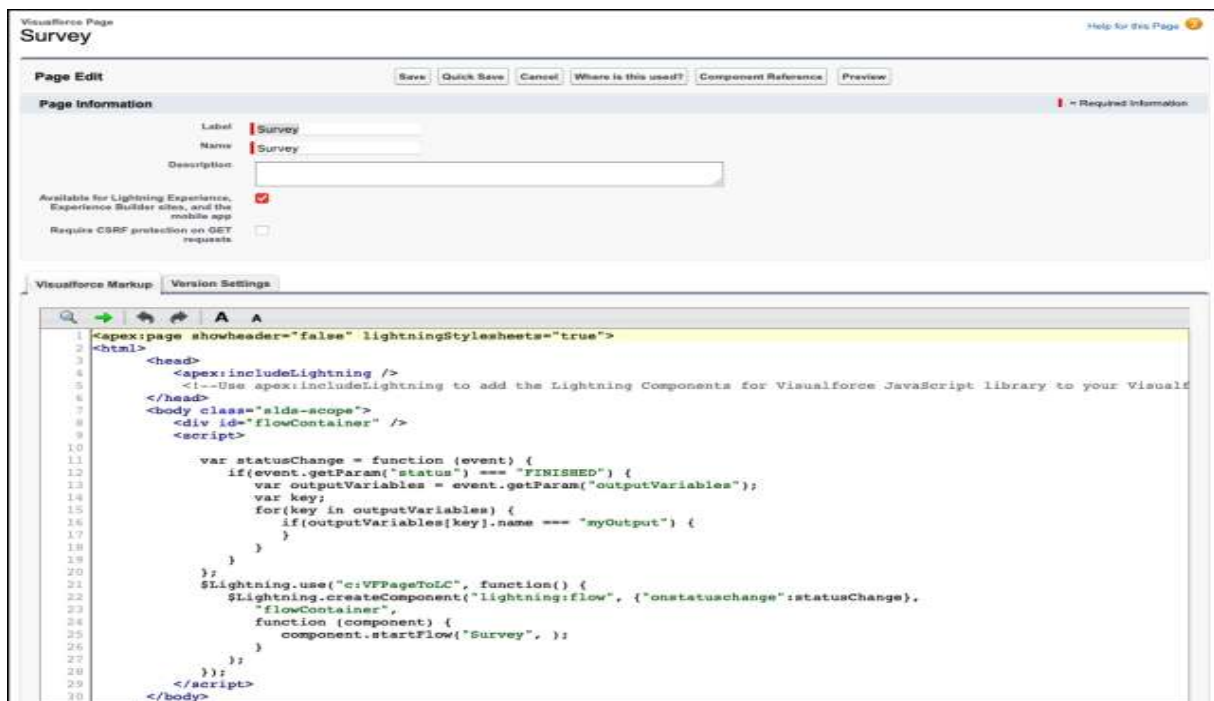
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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 visualforce page
5. Click **Save**.



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**.

The screenshot shows the 'Site Edit' form in Salesforce. The form has a 'Save' button and a 'Cancel' button at the top right. The fields are as follows:

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

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

* Rating

5

* Comment

Awesome Blog

Next

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

Thank You For Completing Our Survey!

Survey Site Guest User

via b99amc6fe77-b-cdzwnaa-gs0.bnc.salesforce.com

8:09 PM (1 minute ago)

to me

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

Reply

Forward