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ASSIGNMENT

on

[SALESFORCE]

**IMPLEMENTING CRM FOR RESULT
TRACKING OF A CANDIDATE WITH
INTERNAL MARKS**

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

Solution:

Step 1: Create Custom Objects

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

Setup Home Object Manager

Search Setup

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Learn more](#) [Documentation](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in lists, 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
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Description:

Context-Sensitive Help Setting

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

Comment 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:

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

- 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 pages 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 Object Manager interface for creating a new custom object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'New Custom Object'. A message bar 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 editing custom profiles. [Learn more](#) | [Don't show this message again](#)'. Below this is the 'Custom Object Definition Edit' section.

Custom Object Information:

- Label:** department (Example: Account)
- Plural Label:** departments (Example: Accounts)
- Starts with vowel sound:**

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

- Object Name:** Department (Example: Account)

Description:

Context-Sensitive Help Setting:

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

Comment 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:** Department Name (Example: Account Name)
- Data Type:**

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:

- 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 pages layout
- Launch New Custom Tab Wizard after saving this custom object

Buttons at the bottom:

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 | CDepartment

SETUP > OBJECT MANAGER
CDepartment

Details

Fields & Relationships

Description

API Name: CDepartment__c

Custom: ✓

Singular Label: CDepartment

Plural Label: CDepartments

Enable Reports

Track Activities

Track Field History

Deployment Status: Deployed

Help Setting: Standard salesforce.com Help Window

Edit | Delete

Setup | Home | Object Manager | CDepartment

SETUP > OBJECT MANAGER
CDepartment

Details

Fields & Relationships

New Relationship

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

Field Label: college

Field Name: college

Description:

Help Text:

Child Relationship Name: CDepartments

Sharing Setting:

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:

Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

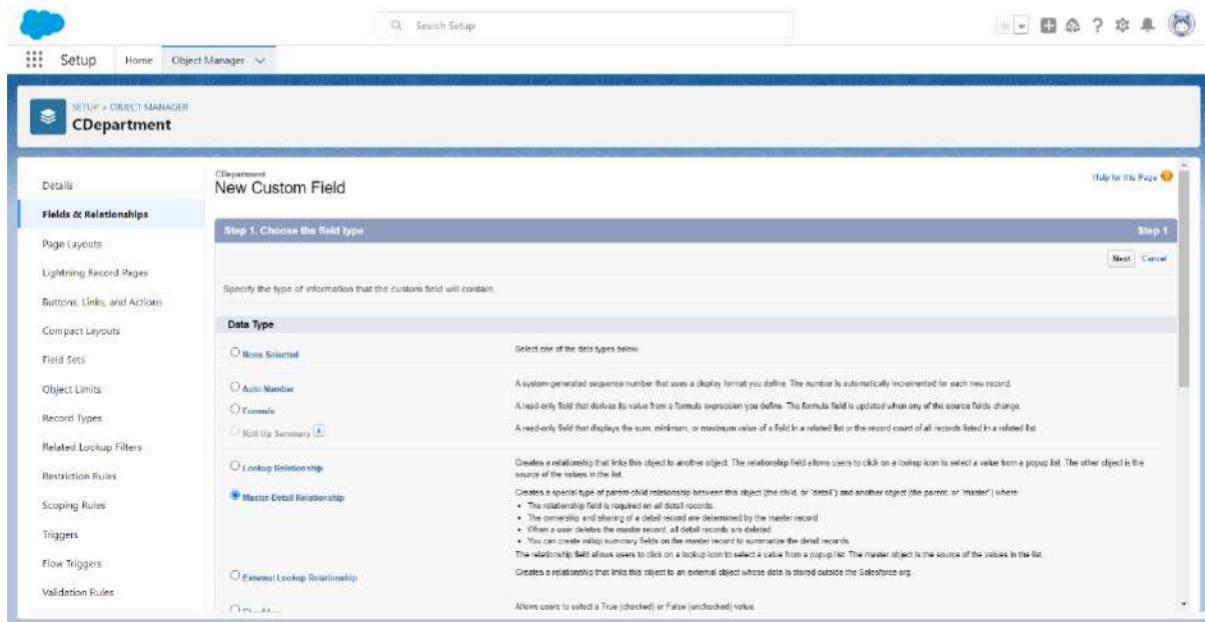
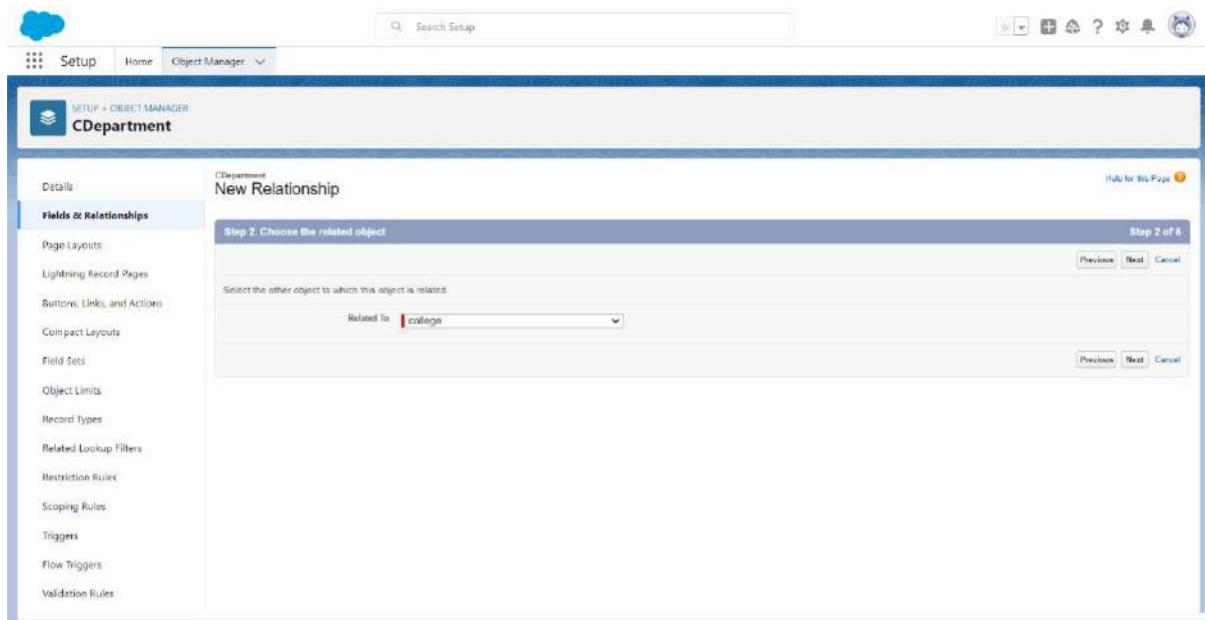
Allow reparenting: Child records can be reparented to other parent records after they are created.

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

Step 3 of 6

Previous | Next | Cancel

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.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college	college__c	Master-Detail(college)		<input checked="" type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input checked="" type="checkbox"/>
Department Name	Name	Text(80)		<input checked="" type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input checked="" type="checkbox"/>

Custom Tabs

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.

Action	Label	Tab Style	Description
Edit Del	Block	Box	
Edit Del	Research Protocol	Square	
Edit Del	Stated	Box	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

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

New Custom Field

Step 5: Add to page layouts

Step 5 of 5

Previous Save & New Save Cancel

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

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

Add Field Page Layout Name
 college Layout

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

Previous Save & New Save Cancel

Setup | Home | Object Manager | college

New Custom Field

Step 4 of 5: Establish field-level security

Field Label	Total_count	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	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Evergreen - Ann Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Help for this Page

Previous | Next | Cancel

Setup | Home | Object Manager | college

New Custom Field

Step 3 of 5: Define the summary calculation

Select Object to Summarize

Master Object: college
Summarized Object: CDDepartments

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate:

Filter Criteria

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

Help for this Page

I = Required Information

Previous | Next | Cancel

New Custom Field

Step 2. Enter the details

Step 2 of 5

Field Label: [\(i\)](#)

Field Name: [\(i\)](#)

Description:

Help Text:

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

Previous **Next** **Cancel**

New Custom Field

Step 1. Choose the field type

Step 1

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

Data Type

None Selected Select one of the data types below

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

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

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

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

The relationship field requires a master record:

- The relationship field appears on the detail record.
- The relationship field's value and ordering of detail records are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

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

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

[\(i\) More...](#) Allows users to select a True (checked) or False (unchecked) value.

Next **Cancel**

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER college'. On the left, a sidebar lists various configuration options: 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, and Validation Rules. The 'Fields & Relationships' section is currently selected. It displays a table with four items, sorted by Field Label. The columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data is as follows:

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

Step 4: Create a Lightning App

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

10. Assign the app to users or profiles.

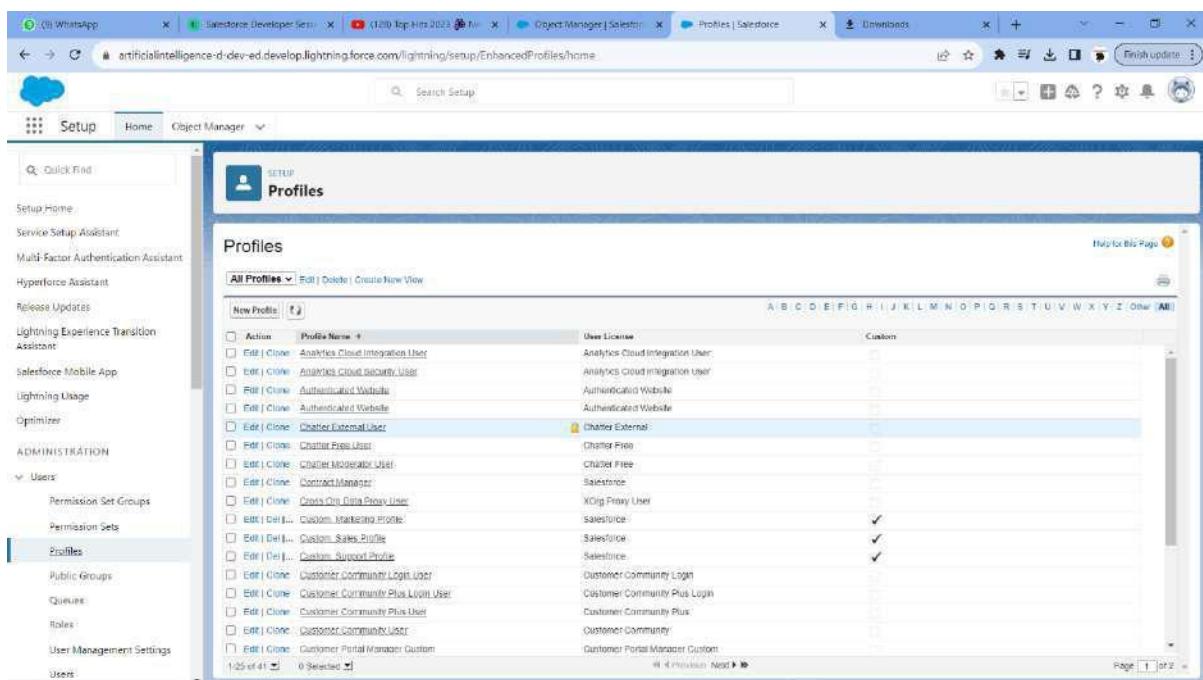
11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main title is 'New Custom Object Tab'. Below it, the sub-step is 'Step 2. Add to Profiles'. A note says: 'Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.' There are two radio button options: 'Apply one tab visibility to all profiles [Default On]' (selected) and 'Apply a different tab visibility for each profile'. The left side lists various user profiles, and the right side shows dropdown menus for 'Tab Visibility' corresponding to each profile. At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, and Profiles. The 'Profiles' section is selected. The main content area displays a table of profiles with columns for Action, Profile Name, User License, and Custom. The table lists various profiles such as 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authorized Website', 'Chatter External', 'Chatter Free', 'Chatter Moderate User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom Marketing Profile', 'Custom Sales Profile', 'Custom Support Profile', 'Customer Community Log In User', 'Customer Community Plus Log In User', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'User License' column shows licenses like 'Analytics Cloud Integration User', 'Analytics Cloud Integration User', 'Authenticated Website', 'Authenticated Website', 'Chatter External', 'Chatter Free', 'Chatter Free', 'Salesforce', 'XOrg Proxy User', 'Salesforce', 'Salesforce', 'Salesforce', 'Customer Community Log In', 'Customer Community Plus Log In', 'Customer Community Plus', 'Customer Community', and 'Customer Portal Manager Custom'. The 'Custom' column contains several checked checkboxes.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. Under 'Users', 'Profiles' is highlighted. The main content area displays a table titled 'Profiles' with columns for Action, Profile Name, User License, and Status. The table lists several profiles, including 'Salesforce API Only System Integrator' (Status: Custom), 'Salesforce' (Status: Standard), 'Silver Partner User' (Status: Standard), 'Admin Manager' (Status: Standard), 'Standard Platform User' (Status: Standard), 'Standard User' (Status: Standard), and 'System Administrator' (Status: Standard). A 'New Profile' button is located at the top left of the table.

The screenshot shows the 'Clone Profile' dialog box. The title bar says 'Clone Profile'. It contains a message: 'Enter the name of the new profile.' Below this is a note: 'You must select an existing profile to clone from.' There are three tabs: 'Existing Profile' (selected), 'Standard Platform User', and 'Salesforce Platform'. Under 'Existing Profile', there is a 'Profile Name' field containing a redacted value. At the bottom are 'Save' and 'Cancel' buttons.

Salesforce Developer Session | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page

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

Salesforce Developer Session | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Profiles

Manager

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

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

Login API Enabled	Enabled Apex Class Access	Enabled Visualforce Page Access	Enabled External Data Source Access	Enabled Shared Credential Access	Enabled External Credential Principal Access
Enabled Custom Metadata Type Access	Enabled Custom Setting Definitions Access	Enabled File Access	Enabled SObject Persistence Access	Enabled Custom Permissions	

Profile Detail

Name:	Manager	User License:	Salesforce Platform	Custom Profile:	<input checked="" type="checkbox"/>
Description:		Created By:	QSPALE	Modified By:	QSPALE
Created Date:	01/10/2020, 7:00 pm	Modified Date:	01/10/2020, 7:00 pm		

Page Layouts

Standard Object Layouts	Global	Operating Hours
Email Application	Not Assigned	Order Layout
Home Page Layout	Home Page Default	Order Product
Account	Account Layout	Payment
Alternative Payment Method	Alternative Payment Method Layout	Payment Authorization
Appointment Invitations	Appointment Invitation Layout	Payment Authorization Adjustment
Asset	Asset Layout	Payment Gateway

Salesforce Developer Session | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Setup Home | Object Manager | Search Setup

Profiles

Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name	Save	Save & New	Cancel
Manager			
User License	Salesforce Platform		
Description	Custom Profile <input checked="" type="checkbox"/>		

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Name	Default On	Learning	Default On
Accounts	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Alert Settings	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>

Communication Subscription Channel Types

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

Custom Object Permissions

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

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User password expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 6

Salesforce Developer Session | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Setup Home | Object Manager | Search Setup

Profiles

Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name	Save	Save & New	Cancel
Manager			
User License	Salesforce Platform		
Description	Custom Profile <input checked="" type="checkbox"/>		

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Name	Default On	Learning	Default On
Accounts	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Alert Settings	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>

Communication Subscription Channel Types

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

Custom Object Permissions

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

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User password expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 6

Salesforce Developer Session

Object Manager | Salesforce

Profiles | Salesforce

Downloads

Fetch update

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Search Setup

Profiles

Contact Point Addresses

Contact Point Contents

Contact Point Emails

Sellers

Streaming Channels

User External Credentials

Custom Object Permissions

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

	Basic Access	Create	Edit	Delete	View All	Modify All
Enhancement Requests	<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: 6

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

Salesforce Developer Session

Object Manager | Salesforce

Profiles | Salesforce

Downloads

Fetch update

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Search Setup

Profiles

Contact Point Addresses

Contact Point Contents

Contact Point Emails

Sellers

Streaming Channels

User External Credentials

Custom Object Permissions

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

	Basic Access	Create	Edit	Delete	View All	Modify All
Enhancement Requests	<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: 6

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

Oscure secret answer for password:
Requires a minimum 1 day password lifetime:
Don't immediately expire links in password emails:

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

- Left Sidebar:** Includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage Optimizer, and ADMINISTRATION.
- Current Page:** Profiles
- Content Area:**
 - Custom Object Permissions:** A table showing permissions for the Bank object. The Bank object has basic access (Read, Create, Edit, Delete) and data administration (View All, Modify All) enabled for the customers profile. The Enhancement Requests row shows View All and Modify All are checked.
 - Session Settings:** Session Timeout Out After is set to 2 hours of inactivity. Session Security Level Required at Login is set to None.
 - Password Policies:** User passwords expire after 90 days, enforce password history (3 passwords remembered), minimum password length is 6, and password complexity requirements include Must include alpha and numeric characters. Password question requirement is Cannot contain password, and maximum invalid login attempts is 10. Lockout effective period is 15 minutes. Other options like obscure secret answers and require a minimum 1 day password lifetime are disabled.

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

- Setup Home:** The main navigation bar includes links for Home, Object Manager, and Downloads.
- Search Bar:** A search bar at the top right is labeled "Search Setup".
- Left Sidebar:** A sidebar on the left lists various setup categories: Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. Under the "Users" category, sub-options like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and the current "Users" tab are visible.
- Current Page:** The main content area is titled "SETUP" and "Users". It displays a list of "All Users" with the following data:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit Login: Adriana Diaz	dadian	test_diana_jas_1@chatter.salesforce.com		<input checked="" type="checkbox"/>	WMS User
<input type="checkbox"/>	Chatter Expert	Chatter	chatby0000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit Login: Clinton Amelia	zell	amelia.clinton.1@expocliento.scsalesforce.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	SS: QORAL	SS	ss020@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User Integration	inted	integration0005000000000000@keab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User Security	scc	usgthsecurity@0005000000000000@keab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Below the table, there are buttons for "New User", "Reset Password(s)", and "Add Multiple Users". The bottom of the page features a navigation bar with letters A through Z and an "Other" link.

Salesforce Developer Session | Lightning Top HITS 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Setup Home Object Manager

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Data
- Email

PLATFORM TOOLS

Apps

Search Setup

New User

User Edit Save Save & New Cancel

General Information

First Name	<input type="text"/>
Last Name	<input type="text"/>
Alias	<input type="text"/>
Email	<input type="text"/>
Username	<input type="text"/>
Nickname	<input type="text"/>
Title	<input type="text"/>
Company	<input type="text"/>
Department	<input type="text"/>
Division	<input type="text"/>

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Office User:

Knowledge User:

Flow User:

Salesforce Cloud User:

Site.com Contributor User:

Site.com Publisher User:

VDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Pallete on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Salesforce Developer Session | Lightning Top HITS 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Setup Home Object Manager

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Data
- Email

PLATFORM TOOLS

Apps

Search Setup

New User

User Edit Save Save & New Cancel

General Information

First Name	sownya
Last Name	bala
Alias	soula
Email	2k20se179@kiot.ac.in
Username	2k21it@kiot.ac.in
Nickname	User189616771282564528
Title	worker
Company	Kiot bank
Department	<input type="text"/>
Division	<input type="text"/>

Role: <None Specified>

User License: Salesforce Platform

Profile: Manager

Active:

Marketing User:

Office User:

Knowledge User:

Flow User:

Salesforce Cloud User:

Site.com Contributor User:

Site.com Publisher User:

VDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Pallete on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Screenshot of the Salesforce Developer Console showing the User Management page for a user named "sowmyi bala".

The User Detail section shows the following information:

Name	sowmyi bala	Role	Role
Alias	stata	User License	Salesforce Platform
Email	2k21it@slot.ac.in	Profile	Manager
Username	2k21it@slot.ac.in	Marketing User	<input checked="" type="checkbox"/>
Nickname	User16991677120206422616	Offline User	<input type="checkbox"/>
Title	sowmyi	Knowledge User	<input type="checkbox"/>
Company	slot bank	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Sites.com Commerce User	<input type="checkbox"/>
Accesses		Web User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Mobile Push Registrations	3338
Locale	English (India)	Data.com User Type	<input type="checkbox"/>
Language	English	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Delegated Approver		Debug Mode	<input type="checkbox"/>
Manager	Only if I am an approver	High-Contrast Pallete on Charts	<input type="checkbox"/>
Received Approval Request Email		Load Lightning Pages Wide Scrolling	<input checked="" type="checkbox"/>
Education ID		Salesforce CRM Content User	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authentication			
App Registration: Salesforce Authentication			

The Gmail inbox shows an incoming email from support@salesforce.com with the subject "Welcome to Salesforce!".

The email body contains the following 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:
2k21it@slot.ac.in

Again, welcome to Salesforce!

© Copyright 2000-2018 [salesforce.com](#), Inc. All rights reserved. Various trademarks held by their respective owners.

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password: Save

* Confirm New Password: Match

Security Question: In what city were you born?

* Answer: Save

Change Password

Password was last changed on 01/20/2023, 7:12 pm.

Login | Salesforce

Username: 2k21it@kiot.ac.in

Password:

Log In

Remember me

[Forgot Your Password?](#)

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

[WATCH ON DEMAND](#)

AIDay

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Recently Viewed | Bank | Salesfo... +

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

MECW

meCW Bank customers Home

Bank Recently Viewed ▾

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

Bank Name

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

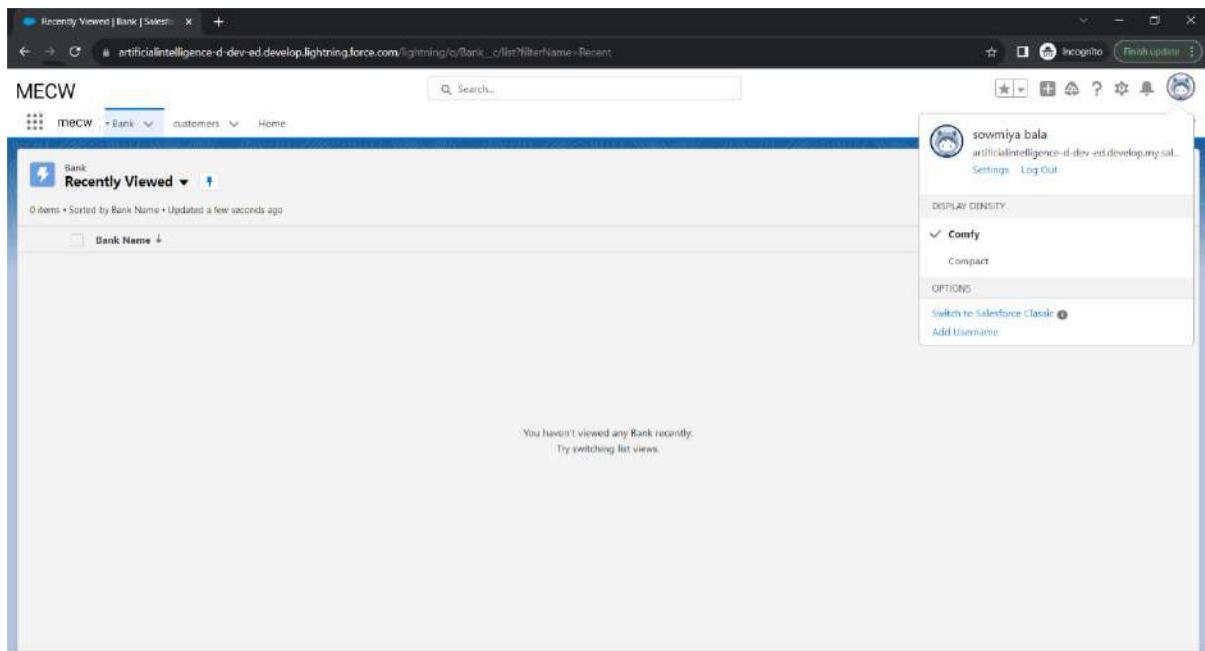
sowmiya bala artificialintelligence-d-dev-ed-develop.my.salesforce.com...
Settings Log Out

DISPLAY DENSITY

✓ Comfy
Compact

OPTIONS

Switch to Salesforce Classic Add Username



New Bank | Salesforce +

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

Incognito Finish update

meCW Bank customers Home

Bank Recently Viewed ▾

0 Items • Updated a few seconds ago

Bank Name

New Change Owner

New Bank

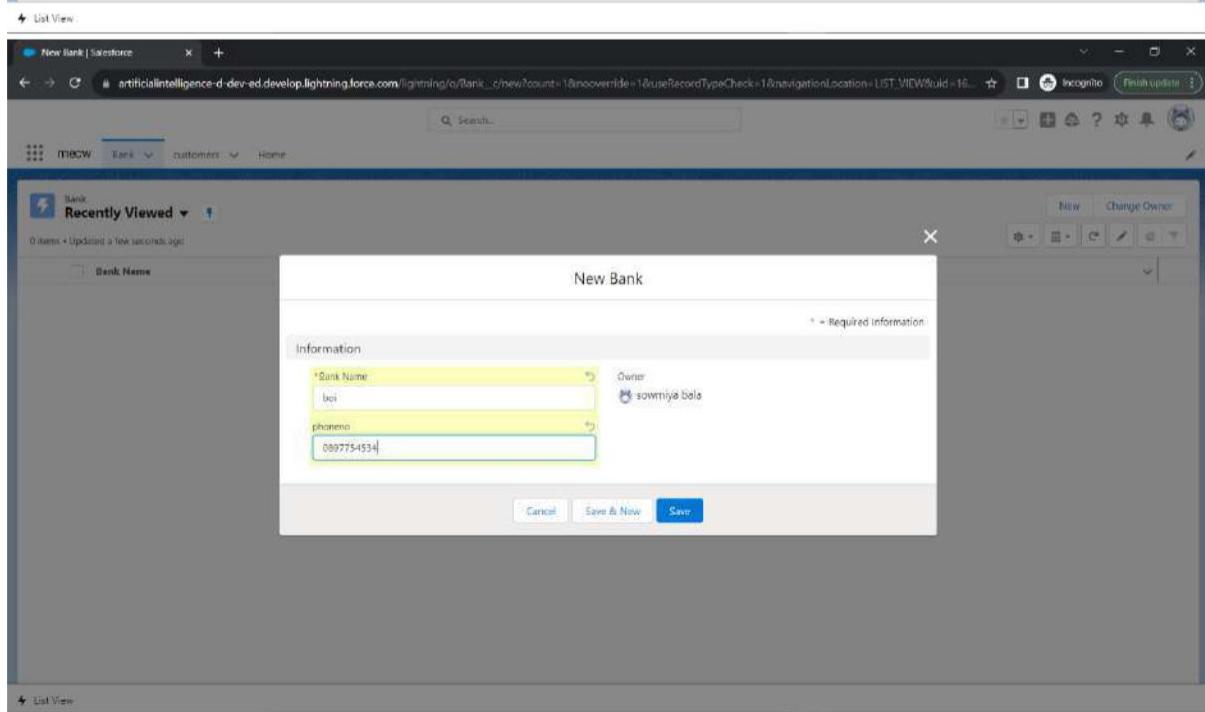
* = Required information

Information

* Bank Name: bei
Owner: sowmiya bala

phoneno: 0897754534

Cancel Save & New Save



The screenshot displays two windows from the Salesforce Lightning interface.

Top Window: A modal titled "New customer" is open, showing the "Information" section. It contains two required fields: "customer Name" (set to "madhu") and "Bank" (set to "boi"). Below the form are three buttons: "Cancel", "Save & New", and "Save".

Bottom Window: The main application window shows the "MECW" page. In the top right corner, a green success message states "customer 'madhu' was created." The main content area displays the "Details" tab for the newly created customer record. The "customer Name" field is populated with "madhu" and the "Bank" field with "boi". The "Created by" field shows "sowmiya bala" on 01/10/2023, 7:17 pm, and the "Last Modified by" field also shows "sowmiya bala" on the same date and time. Navigation links "Related" and "Details" are visible at the top of the card.

The screenshot displays two views of the Salesforce Setup interface, specifically the Profiles section.

Top View: Profiles List

The left sidebar shows the navigation menu under the **Users** section, with **Profiles** selected. The main area lists profiles with columns for Action, Profile Name, and User License. One profile, **Standard Platform User**, is highlighted with a blue selection bar.

Action	Profile Name	User License
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrator	Salesforce Integration
<input type="checkbox"/> Edit Delete	Administrator	Salesforce
<input type="checkbox"/> Edit Clone	Super Partner User	Super Partner
<input type="checkbox"/> Edit Clone	Sales Manager	Salesforce
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform
<input type="checkbox"/> Edit Clone	Standard User	Salesforce
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce

Bottom View: Clone Profile Dialog

The same sidebar is visible. The main area shows a **Clone Profile** dialog. It prompts the user to "Enter the name of the new profile". A note at the top states: "You must select an existing profile to clone from." The dialog includes fields for Existing Profile (set to Standard Platform User), User License (set to Salesforce Platform), and Profile Name (containing "salesmanager").

Dialog Fields:

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

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

- Page Header:** artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQCE%3Fsetuid%3DEnhancedPr... (URL)
- Page Title:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup Home, Object Manager, Quick Find.
- Current Section:** Profiles
- Profile Name:** salesmanager
- Description:** Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
- Record Type Settings:** If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
- Profile Detail:** Edit, Clone, Delete, View Users
- User License:** Salesforce Platform
- Description:** salesmanager
- Created By:** QOPAL_S (01/10/2020, 7:10 pm)
- Modified By:** QOPAL_S (01/10/2020, 7:10 pm)
- Custom Profile:**
- Page Layouts:** Standard Object Layouts, Alternative Payment Method Layout, Appointment Invitations Layout, Asset Layout.
- Operating Hours:** Global Layout, Order Layout, Order Product Layout, Payment Layout, Payment Authorization Layout, Payment Authorization Adjustment Layout, Payment Gateway Layout.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The 'salesmanage' profile is selected for editing. The profile edit form includes fields for Name (salesmanage), User License (Salesforce Platform), and Description. Under 'Custom App Settings', the 'Analytics Studio (standard_analytics)' setting is set to 'Not (not)' and 'Default'. The 'App Launcher (standard_AppLauncher)' setting is set to 'Default'. Under 'Service Provider Access', the 'Tab Settings' section has a checkbox for 'Override user's personal tab customizations' which is unchecked. The 'Standard Tab Settings' section shows 'Home' and 'Default On' for the 'Learning' tab.

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

Setup Home Object Manager

Quick Find

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

Contact Point Labels User External Classifications

Custom Object Permissions

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

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: 6

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

Observe secret answer for password reuse:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

Save Save & New Cancel

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

Setup Home Object Manager

Quick Find

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

Contact Point Labels User External Classifications

Custom Object Permissions

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

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: 6

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

Observe secret answer for password reuse:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

Save Save & New Cancel

Salesforce Developer Session 2 | Top Hits 2023 | New Page | Users | Salesforce | Welcome to Salesforce Verify | Finish update

Setup Home Object Manager

Q user

v **Users**

- Permission Set Groups
- Permission Sets
- 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
- App Menu

Cloud Search Setup Help for this Page

New User

User Edit Save Save & New Cancel

General Information

First Name	[]
Last Name	[]
Alias	[]
Email	[]
Username	[]
Nickname	[]
Title	[]
Company	[]
Department	[]
Division	[]

Role: <None Specified> User License: Salesforce Integration Profile: Salesforce API Only System Integrations Active:

Marketing User: Office User: Knowledge User: Flow User: Service Cloud User: Site.com Contributor User: Site.com Publisher User: WDC User:

Datacom User Type: -None- Datacom Monthly Addition Limit: Default Limit (300) Accessibility Mode (Classic Only): High-Contrast Palms on Charts: Load Lightning Pages While Scrolling: Debug Mode:

Salesforce Developer Session 2 | Top Hits 2023 | New Page | Users | Salesforce | Welcome to Salesforce Verify | Finish update

Setup Home Object Manager

Q user

v **Users**

- Permission Set Groups
- Permission Sets
- 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
- App Menu

Cloud Search Setup Help for this Page

New User

User Edit Save Save & New Cancel

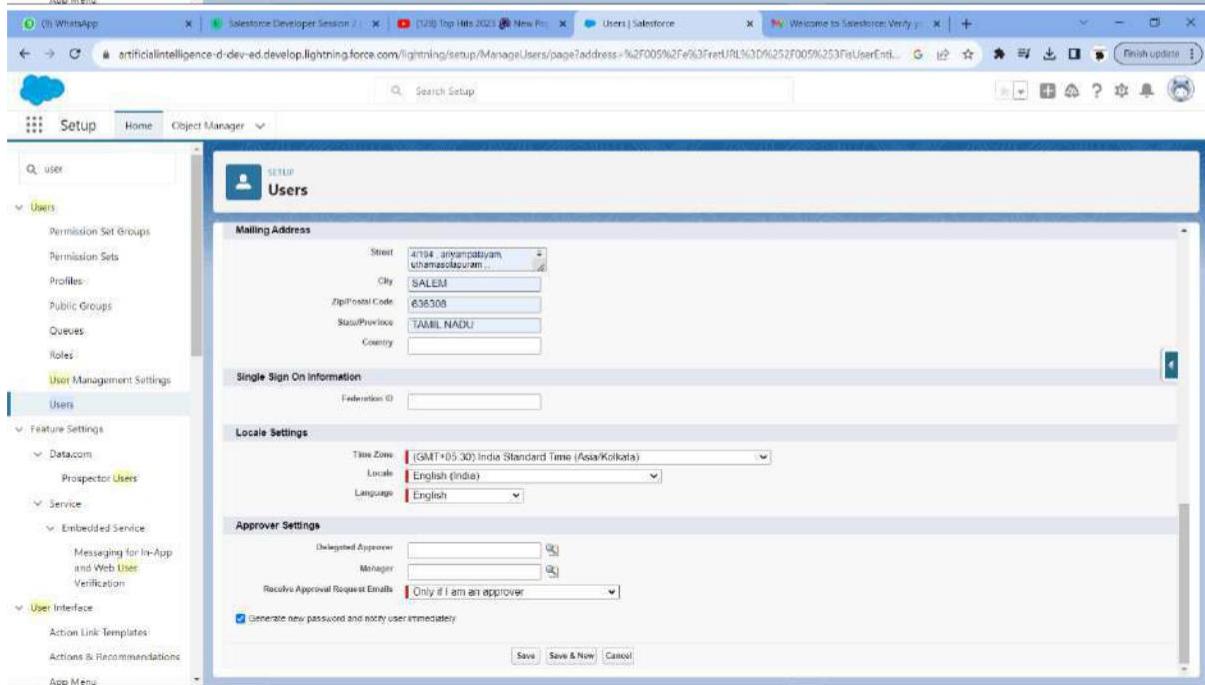
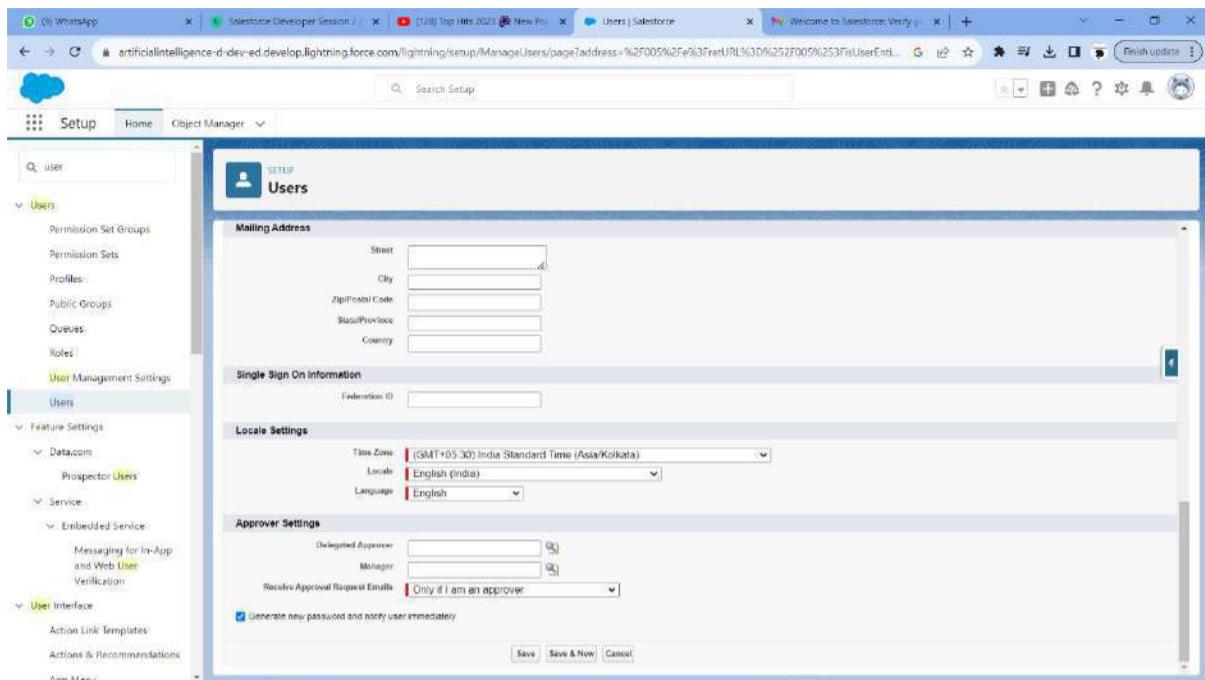
General Information

First Name	machu
Last Name	b
Alias	mb
Email	2k20ce179@kot.ac.in
Username	2k20csut@kot.ac.in
Nickname	User189616842426854192
Title	worker
Company	Kotbank
Department	Sales
Division	[]

Role: <None Specified> User License: Salesforce Platform Profile: salesmanager Active:

Marketing User: Office User: Knowledge User: Flow User: Service Cloud User: Site.com Contributor User: Site.com Publisher User: WDC User:

Datacom User Type: -None- Datacom Monthly Addition Limit: Default Limit (300) Accessibility Mode (Classic Only): High-Contrast Palms on Charts: Load Lightning Pages While Scrolling: Debug Mode:



The image displays two side-by-side browser windows. The top window is a Salesforce Developer Session showing the 'Users' page. The bottom window is a Gmail inbox.

Salesforce Developer Session (Top Window):

- Left Sidebar:** Shows navigation links like Setup, Home, Object Manager, and various User Management settings sections such as Feature Settings, Datacom, Prospector, Service, Embedded Service, and User Interface.
- Right Content Area:** Displays the 'User Detail' for a user named 'madhu b'. The user's email is '2k20csit@kiot.ac.in'. Other details include: Name: madhu b, Alias: mbo, Username: 2k20csit@kiot.ac.in, Nickname: User16991664242005419200, Title: sales, Company: kiot bank, Department: Sales, Division: Sales, Address: #100, Arangampalam, Uthamapalayam,, Paravur, kerala - 696508, TALUK: SEDAM, DISTRICT: TAMIL NADU, 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 Registration: One-Time Password Authentication, Role: Salesforce Platform, User License: Marketing User, Profile: salesmanager, Status: Active, and various other account settings.

Gmail (Bottom Window):

- Left Sidebar:** Shows the Gmail interface with tabs for Mail, Chat, Spaces, and Meet. The Mail tab is active, showing the 'Inbox' with 5,318 messages.
- Right Content Area:** Displays an incoming email from Salesforce with the subject 'Welcome to Salesforce!'. The email body contains:

Welcome to Salesforce!

Click below to verify your account.

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

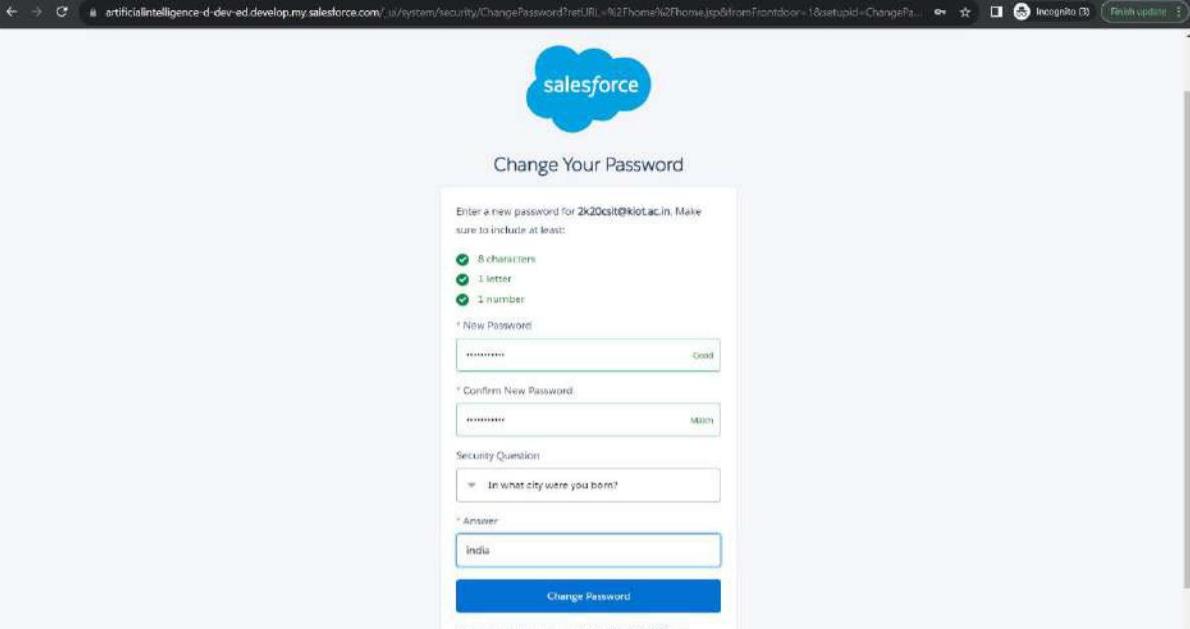
To easily log in later, save this URL:
<https://artificialintelligence-d-dev-ed-developer.my.salesforce.com>

Username:
2k20csit@kiot.ac.in

Again, welcome to Salesforce!

Change Your Password | Sales... +

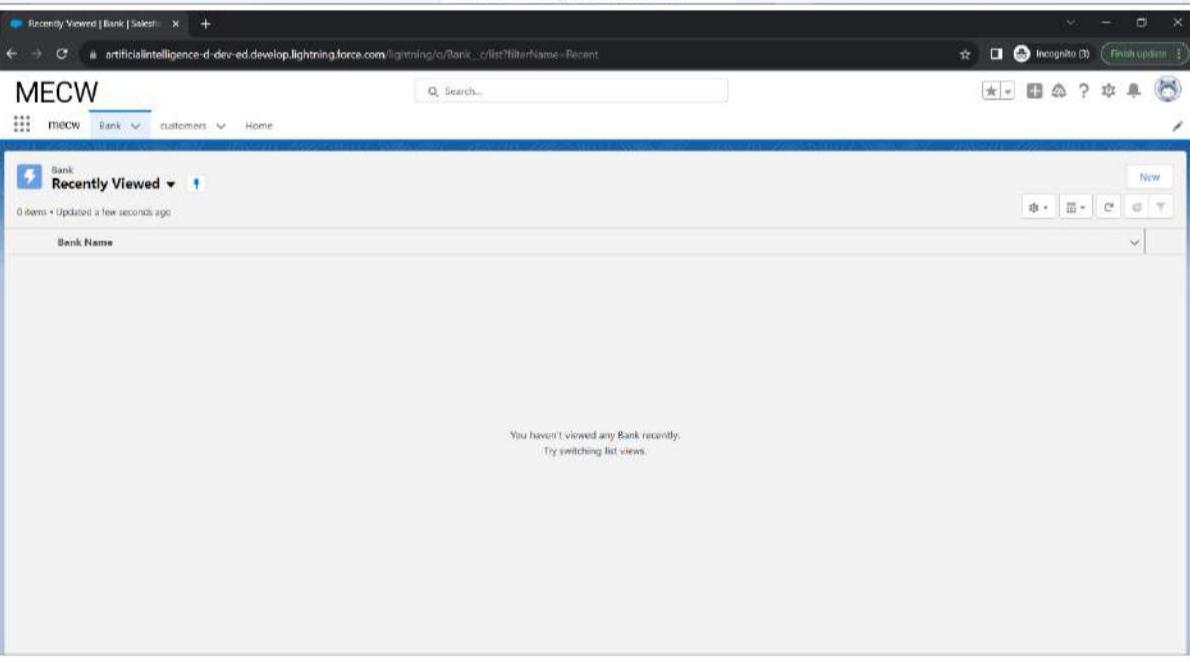
artificialintelligence-d-dev-ed-develop.my.salesforce.com/u/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupId=ChangePa... Incognito [Finish update]



The screenshot shows the Salesforce 'Change Your Password' page. At the top is the blue Salesforce logo. Below it is the heading 'Change Your Password'. A note says 'Enter a new password for 2k20csit@kilotac.in. Make sure to include at least:'. It lists three requirements with green checkmarks: '8 characters', '1 letter', and '1 number'. There are two input fields: 'New Password' containing '*****' and 'Confirm New Password' containing '*****'. Below these are 'Security Question' and 'Answer' fields. The question is 'In what city were you born?' and the answer is 'India'. A large blue 'Change Password' button is at the bottom. A small note at the bottom of the page says 'Password was last changed on 01/30/2023, 7:24 pm.'

Recently Viewed | Bank | Sales... +

artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/c/Bank__c/list?filterName=Recent Incognito [Finish update]



The screenshot shows the MECW Lightning App's 'Recently Viewed' page for the 'Bank' object. The page title is 'Recently Viewed' with a 'Bank' filter applied. It includes a search bar and various navigation icons. The main content area displays a table with one row, showing the 'Bank Name' column with the value 'India'. A message at the bottom states 'You haven't viewed any Bank recently. Try switching list views.' At the bottom left is a 'List View' link.

Recently Viewed | customers

MECW

customers Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

WhatsApp

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

Search Setup

Setup

Permission Sets

Permission Sets

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

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

All Permission Sets

Action	Permission Set Label	Description	Licenses
<input type="checkbox"/>	Access to ads	Allows access to the store. Lets users see products and categories.	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all buyer capabilities, and allows access to manage carts and checkout.	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Creates that the user is a sales cloud or service cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manages 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 Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Customer Profile Manager	Allows users create, read, edit, and delete iterations, sublocations, groups, and profiles.	Facility Manager
<input type="checkbox"/>	Field Service Mobile	Give your mobile workers access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/>	Commerce Merchandiser User Permission Set Standard	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management.	Commerce Merchandiser User
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Operator/Manager	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper	Limited access to Order Management features for Self Service.	Lightning Order Management User

1-25 of 39 16 Selected

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

Step 2:

Permission Sets:

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

Object-Level Security:

- In each profile and permission set, set the object-level security for the Account object to

"Read" to ensure that both User A and User B can view Account records.

Record-Level Security:

- Implement record-level security using Criteria-Based Sharing Rules.

- Create a sharing rule that shares Account records owned by User A with User A and records owned by User B with user B.

- For the sharing rule criteria, specify that records owned by User A are shared with user A, and records owned by User B are shared with User B.

Ownership:

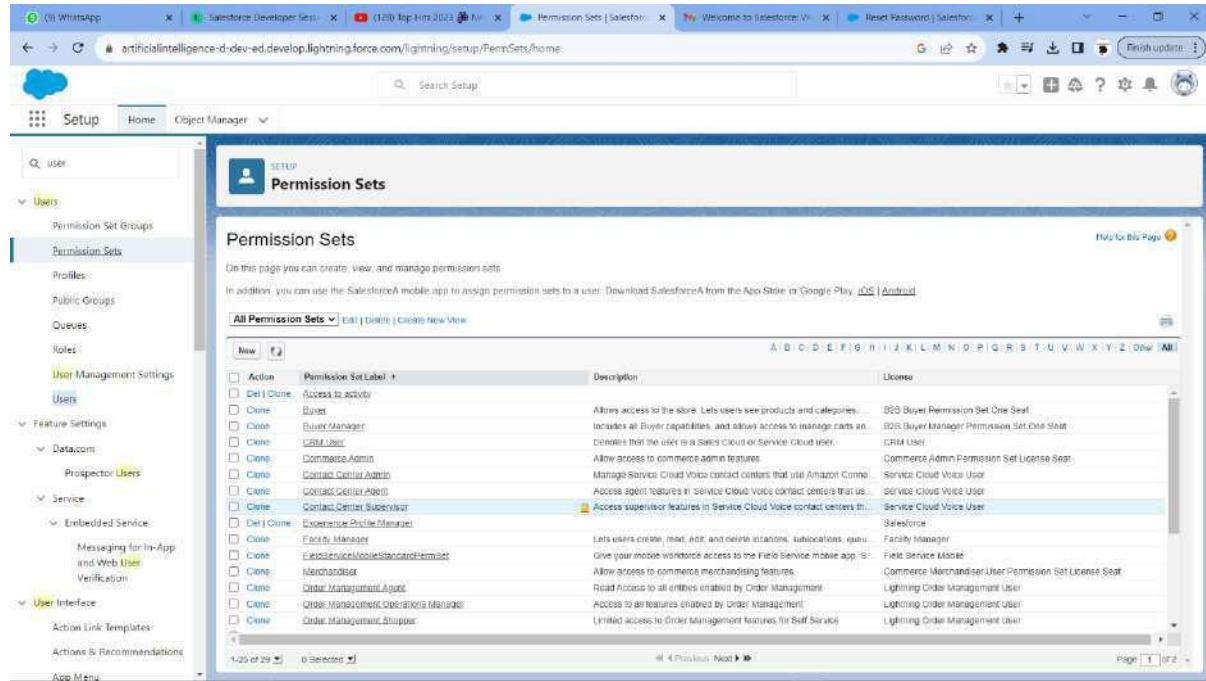
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

Organization-Wide Defaults:

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

Testing:

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



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

- Page Title:** Permission Sets
- Section:** Permission Sets
- Table Headers:** Action, Permission Set Label, Description, License
- Table Data:** A list of permission sets, including:
 - B2B Buyer Permission Set One Seat
 - B2B Buyer Manager Permission Set One Seat
 - CRM User
 - Commerce Admin Permission Set License Seat
 - Service Cloud Voice User
 - Service Cloud Voice User
 - Salesforce
 - Facility Manager
 - Field Service Mobile
 - Commerce Merchandise User Permission Set License Seat
 - Lightning Order Management User
 - Lightning Order Management User
 - Lightning Order Management User
- Page Navigation:** 1 of 29 | 0 Selected | 4 Previous | Next | Page | 1 | 2 |

Setup

Permission Set

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.

Licenses:

Save Cancel

Setup

Permission Set

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.

Licenses:

Save Cancel

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

Permission Set Overview:

Setting	Description	Value
API Name	salesmanager	
Namespace Prefix		
Created By	GLOBAL_S_01/10/2023, 7:29 pm	
Last Modified By	GLOBAL_S_01/10/2023, 7:29 pm	

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.

EWK Access:
Permissions to execute Flows.

Object Settings (Detailed View):

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	—
AI Impact Reasons	No Access	—	—
AI Report Insights	No Access	—	—
Alternate Payment Methods	No Access	27	—
API Activity Event Stores	No Access	—	—
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 Responsibilities	—	10	—
Assets	No Access	42	—
Asset Status Periods	No Access	11	—

The screenshot shows the Salesforce Setup interface under the User section. A permission set named "salesmanager" is selected. The "Bank" tab is active, displaying "Tab Settings" where the "Available" and "Visible" dropdowns are set to "Bank". Below this is the "Object Permissions" section, which lists permissions for the "Bank" object. The "Read" permission is checked under "Enabled". The "Field Permissions" section shows permissions for fields like "Bank Name", "Created By", and "Last Modified By".

This screenshot shows the same Salesforce setup interface after changes have been made. In the "Object Permissions" section, the "View All" permission is now checked under "Enabled" for the "Bank" object. The rest of the page remains identical to the first screenshot.

Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce!

Reset Passwords | Salesforce

Finish update

Setup Home Object Manager

User

Users

Permission Set Groups

Permission Sets

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

App Menu

Search Setup

SETUP > PERMISSION SET SALESMANAGER salesmanager

Current Assignments

Add Assignment

No assignments defined.



Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce!

Reset Passwords | Salesforce

Finish update

Setup Home Object Manager

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Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Search Setup

SELECT USERS TO ASSIGN

All Users

1 item selected

Full Name	Role	Profile
Amelia Ellington	Force.com - App Subscription User	Force.com - App Subscription User
Chatter Expert	Chatter Free User	Chatter Free User
Diya Adarna	UHS User	UHS User
GOPAL S	System Administrator	System Administrator
Integration User	Analytics Cloud Integration User	Analytics Cloud Integration User
mathu b	salesmanager	salesmanager
Security User	Analytics Cloud Security User	Analytics Cloud Security User
savemilya bala	Manager	Manager

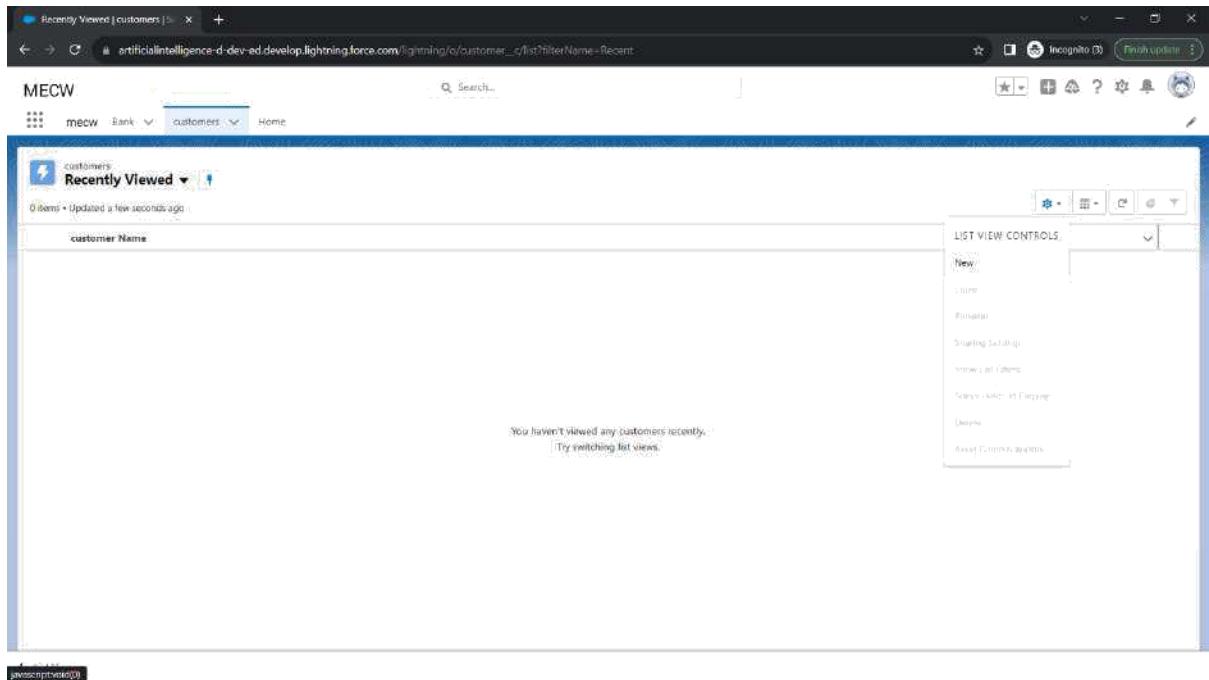
Canceled Next

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. A modal dialog titled 'Select an expiration Option for Assigned Users' is open. It contains two radio button options: 'No expiration date' (selected) and 'Specify the expiration date'. Below these are buttons for '1 Day', '1 Week', '30 Days', '90 Days', and 'Custom Date'. To the right is a 'Time Zone' section with a dropdown menu labeled 'Select a time zone...'. The main body of the dialog is titled 'Selected Users' and displays a table with one row. The table columns are: Full Name, Role, Profile, Active, User License, and Expires On. The data in the table is as follows:

Full Name	Role	Profile	Active	User License	Expires On
madhu.b	Sales Manager	✓	Salesforce Platform	Never Expires	

At the bottom of the dialog are 'Cancel' and 'Assign' buttons.

The screenshot shows the Salesforce Setup interface. The left sidebar is open, displaying various categories under 'User Management' such as 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The 'Users' section is currently selected. In the center, a modal window titled 'salesmanager' is displayed, indicating '1 assignments were successful.' Below this, the 'Assignment Summary' table lists one user: 'mathu b' with 'User License' 'Salesforce Platform' and 'Status' 'Success'. At the bottom right of the modal is a 'Done' button.

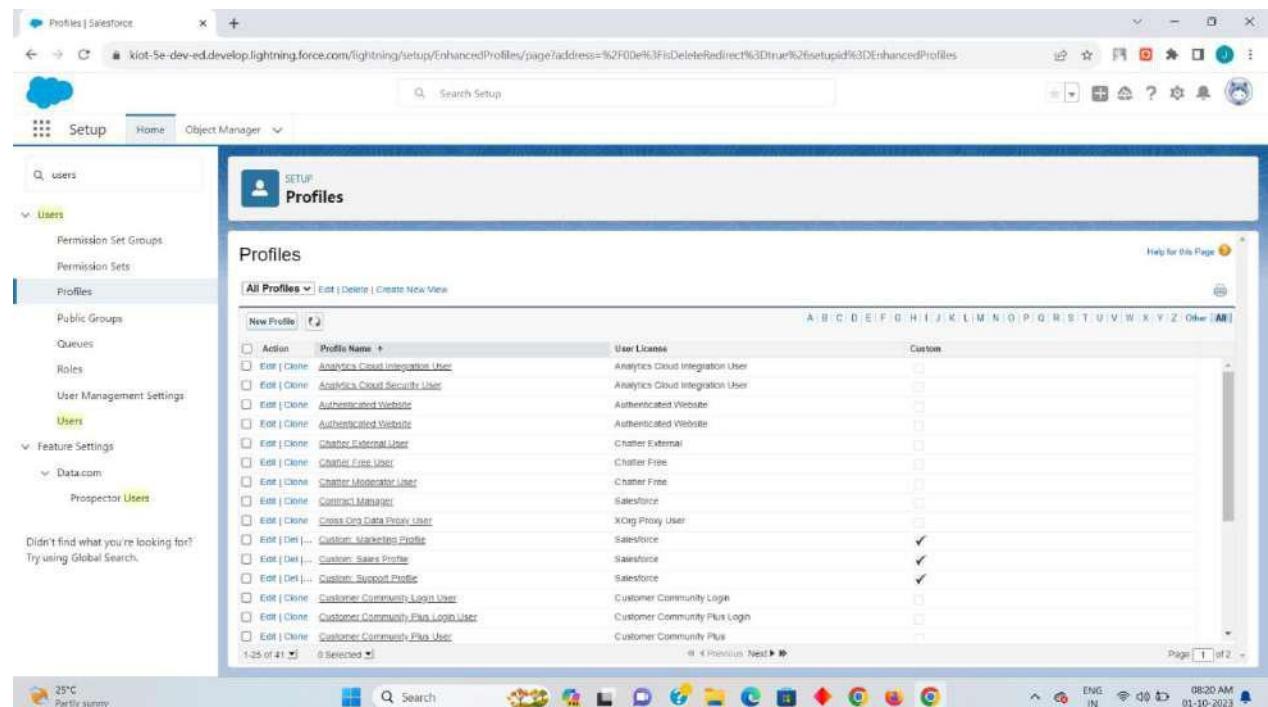


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

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

Setup-quick search[profile]

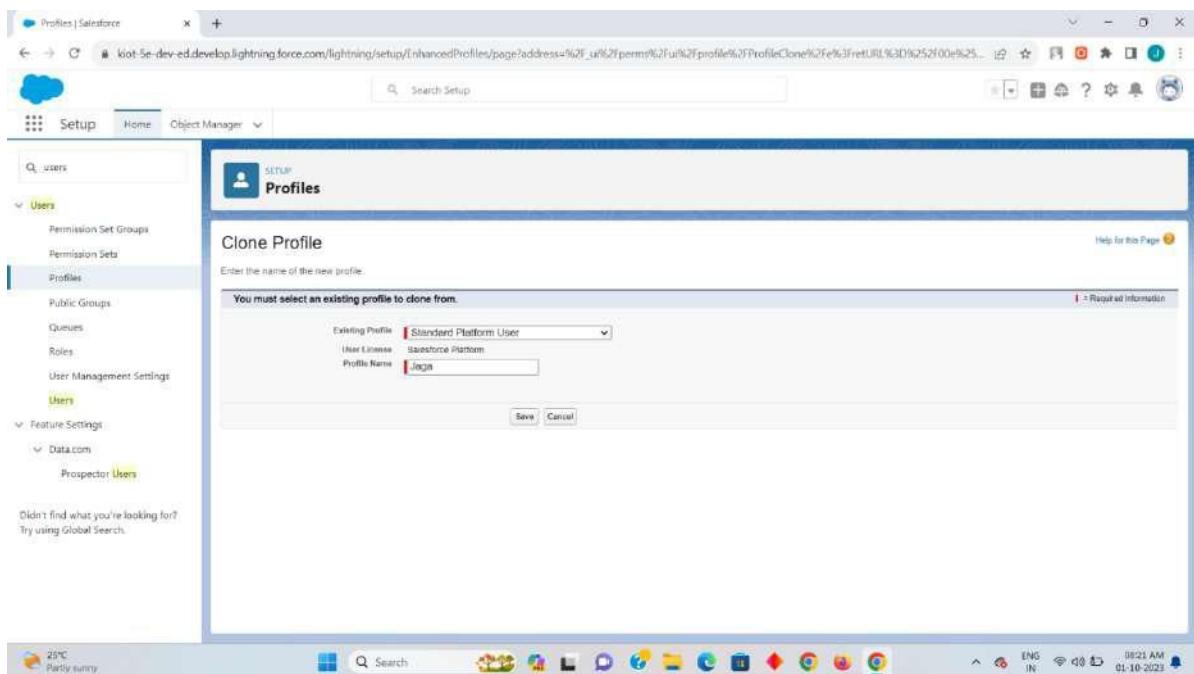


The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager. Under Users, Profiles is selected.
- Section Header:** Profiles
- Sub-Header:** All Profiles
- Table:** Displays a list of profiles with columns: Action, Profile Name, User License, and Custom.
- Data:** The table lists various profiles, many of which have the "Custom" checkbox checked. Some profiles are marked with a checkmark in the User License column.
- Bottom:** Page navigation (Previous, Next), Page 1 of 2, and system status bar showing 25°C, ENG IN, 08:20 AM, 01-10-2023.

Step 2:

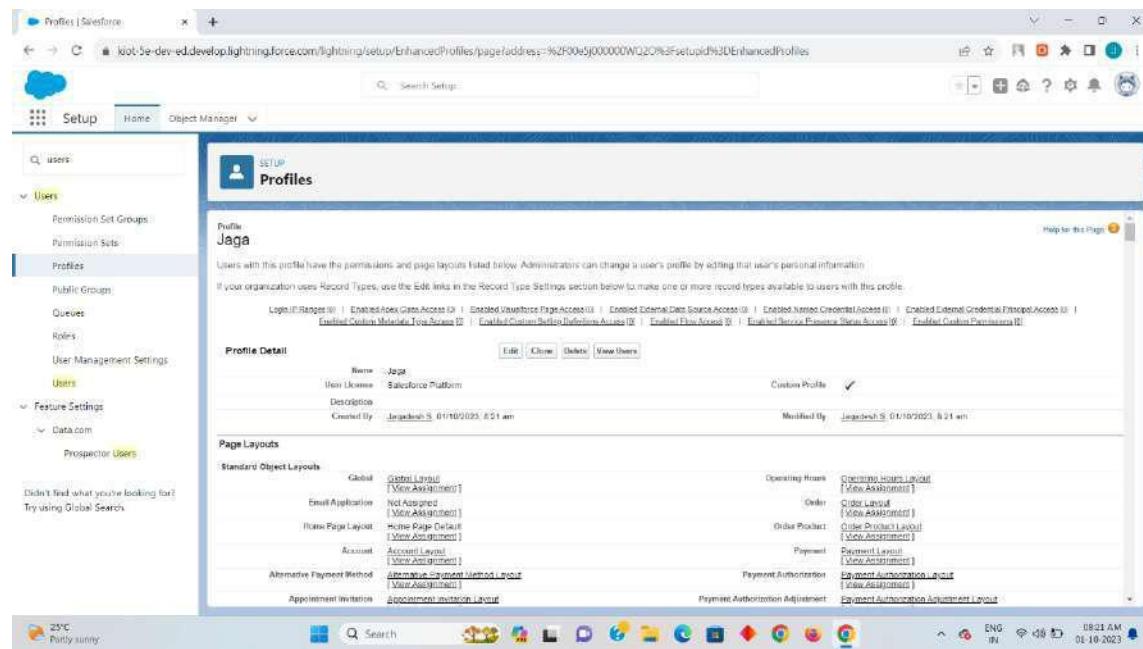
Click on the new to create a new profile along with the label and Api



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

Step 3:

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



Profiles | Salesforce

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

08:21 AM 01-10-2023

Profiles

Customizable

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

Custom Object Permissions

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

Session Settings

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

Enable different Experience Cloud login policies for employees:

- Separate Experience Cloud site and Salesforce login authentication for employees:
- Block login IP restrictions:
- Skip employee device activation during Experience Cloud site login:

Basic Access Data Administration

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

Basic Access Data Substitution

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

Profiles | Salesforce

Setup Home Object Manager

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08:21 AM 01-10-2023

Profiles

Customizable

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

Custom Object Permissions

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

Session Settings

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

Enable different Experience Cloud login policies for employees:

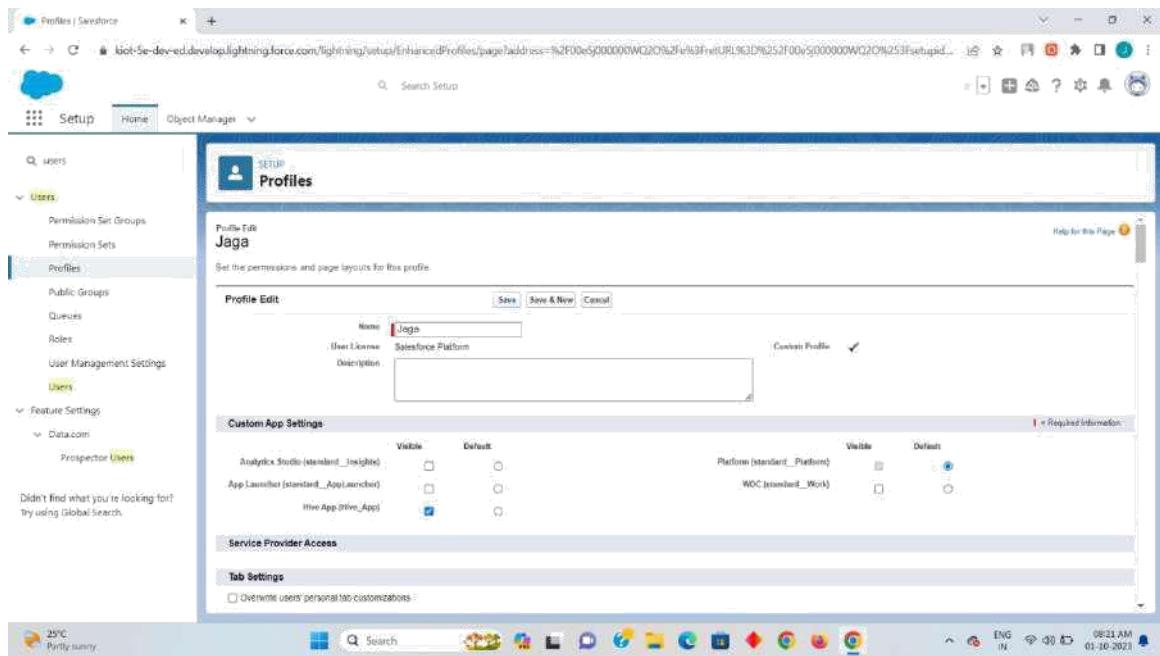
- Separate Experience Cloud site and Salesforce login authentication for employees:
- Block login IP restrictions:
- Skip employee device activation during Experience Cloud site login:

Basic Access Data Administration

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

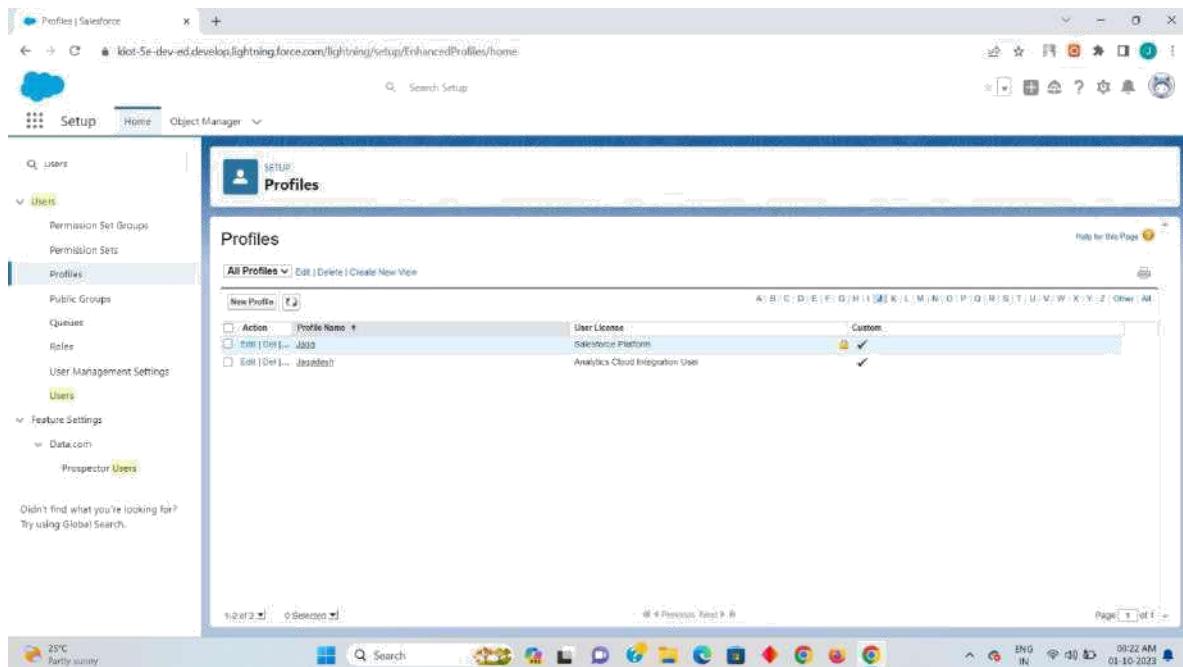
Basic Access Data Substitution

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



Step 4

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



Step 5:

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Eased	Chatter	shath_005@00000000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Shrey_Jaga	shrey	jace_grey_1@gmail.com c7d23scph3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	S_Jaga	SJ	user255@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S_Jagadev	SJ	w2r@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S_Jagadev	SJ	jaga1111@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	integ	integration@00000000000000000000000000000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	lightningsecurity@00000000000000000000000000000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce

Setup Home Object Manager

Q Users

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Data.com

Prospector Users

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

New User

User Edit

General Information

Save Save & New Cancel

First Name: Jagadeesh11
Last Name: S
Alias: J
Email: user123@gmail.com
Username: user123@gmail.com
Nickname: User109612075144952592
Title:
Company:
Department:
Division:
Role: Director - Channel Sales
User License: Salesforce Platform
Profile: J - Name - Jag
Actions: Standard Platform User
Marketing User:
Office User:
Knowledge User:
Flow User:
Service Cloud User:
Salesforce Connector User:
Ericsson Publisher User:
WDC User:
Data.com User Type: Admin
Data.com Weekly Activity Limit: Default (1000)
Accessibility Mode (Classic Only):
High-Contrast Theme on Charts:
08:21 AM 01-10-2023

25°C Partly sunny

Q Search

Google Chrome

File Edit View Insert Tools Window Help

Salesforce

Setup Home Object Manager

Q Users

Users

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Prospector Users

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

New User

User Edit

General Information

Save Save & New Cancel

First Name: Jagadeesh22
Last Name: S
Alias: J
Email: user1@gmail.com
Username: user1@gmail.com
Nickname: User109612075144951745
Title:
Company:
Department:
Division:
Role: Marketing Team
User License: Salesforce Platform
Profile: J - Name - Jag
Actions: Standard Platform User
Marketing User:
Office User:
Knowledge User:
Flow User:
Service Cloud User:
Salesforce Connector User:
Ericsson Publisher User:
WDC User:
Data.com User Type: Admin
Data.com Weekly Activity Limit: Default (1000)
Accessibility Mode (Classic Only):
High-Contrast Theme on Charts:
08:21 AM 01-10-2023

25°C Partly sunny

Q Search

Google Chrome

File Edit View Insert Tools Window Help

Salesforce

Setup Home Object Manager

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Prospector Users

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

All Users

On this page you can edit, view, and manage users. In addition, download Salesforce1 to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices! iOS | Android

View All Users Edit Details

New User Reset Password Add Multiple Users

Action	Full Name	Mobile	Email	Role	Action	Profile
<input type="checkbox"/>	user1	9876543210	user1@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	user2	9876543210	user2@gmail.com	SP Admin	<input checked="" type="checkbox"/>	Standard Administrator
<input type="checkbox"/>	user3	9876543210	user3@gmail.com	Channel Sales Team	<input checked="" type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	user4	9876543210	user4@gmail.com	Director - Channel Sales	<input checked="" type="checkbox"/>	Jag
<input checked="" type="checkbox"/>	user5	9876543210	user5@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jag

New User Reset Password Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 9

25°C Partly sunny

Q Search

Google Chrome

File Edit View Insert Tools Window Help

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

https://k10-5a-dev-ed.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Users

Permission Set Groups

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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

Label	Permission Set Label	Description	Licenses
None	Guest	Allows access to the store. Lets users see products and categories.	003 Buyer Permission Set One Seat
None	Sales Manager	Includes all the rights available, and allows access to manage cases etc.	003 Buyer Management Permission Set One Seat
None	Global User	Licenses that the user is a Sales Cloud or Service Cloud user.	003 User
None	Commerce Admin	Allows access to commerce admin features.	Commerce Admin Permission Set License Seat
None	Contact Center Admin	Manage Service Cloud View contact centers that use Amazon Connect.	Service Cloud View User
None	Contact Center Agent	Access agent features in Service Cloud View contact centers that use Amazon Connect.	Service Cloud Voice User
None	Contact Center Supervisor	Access supervisor features in Service Cloud View contact centers that use Amazon Connect.	Service Cloud Voice User
None	Lead Owner	Relationship management.	Relationship
None	Facility Manager	Facility management.	Facility Manager
None	Field Service Mobile	Give your mobile workforce access to the Field Service mobile App.	Field Service Mobile
None	Merchandise	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
None	User Management User	Read Access to all entities enabled by Order Management.	Lightning Order Management User
None	Order Management Questions Response	Access to all features enabled by Order Management.	Lightning Order Management User

1 of 30 | 0 Updates | 0 Changelog | Next

Page 1 of 2

https://k10-5a-dev-ed.lightning.force.com/lightning/setup/PermSets/home#

25°C Party sunny

Q Search

Help for this Page

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

https://k10-5a-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=ln2Pudd%2fPermissionSets%2fnewPermissionSet.apexp

Setup Home Object Manager

Users

Permission Set Groups

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Prospector Users

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

Permission Set Create

Enter permission set information

Label: permission12

API Name: permission12

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use the permission set?

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

Not sure what a permission set license is? Learn more here.

License: --None--

Save Cancel

https://k10-5a-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=ln2Pudd%2fPermissionSets%2fnewPermissionSet.apexp

25°C Party sunny

Q Search

Help for this Page

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

http://kilot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSS%00000Pgta%2FObjectPermissions

Setup Home Object Manager

Q users

v Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Quotas

Roles

User Management Settings

Users

Feature Settings

v Data.com

Prospector Users

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

Find settings Close Delete Edit Properties Manage Assignments

Permission Set Overview

Description: permission12 API Name: permission12 Namespace Prefix: Created By: user00000000000000000000000000000000 Last Modified By: user00000000000000000000000000000000 Session Activation Required: Late Modified On: 01/10/2023 8:24 am

Apps

Assumed 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 for all custom objects and fields, and settings such as tab visibility.

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

25°C Party sunny

Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

http://kilot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSS%00000Pgta%2FObjectPermissions

Setup Home Object Manager

Q users

v Users

Permission Set Groups

Permission Sets

Profiles

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v Data.com

Prospector Users

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

Find settings Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings

Object Settings

Object Name: ACCOUNT_Groups

ACCOUNT

AI_Reasons

AI_Behavior_Insights

Alternative Payment Methods

API_Analytics_Event_Stores

App_Analytics_Query_Requests

Application_Usage_Assessments

Appointment_Categories

Assessment_Invitations

Appointment_Invitations

Appointment_Schedule_Aggregates

Appointment_Schedule_Logs

Assessment_Task_Time_Stats

Asset Actions

Asset_Action_Sources

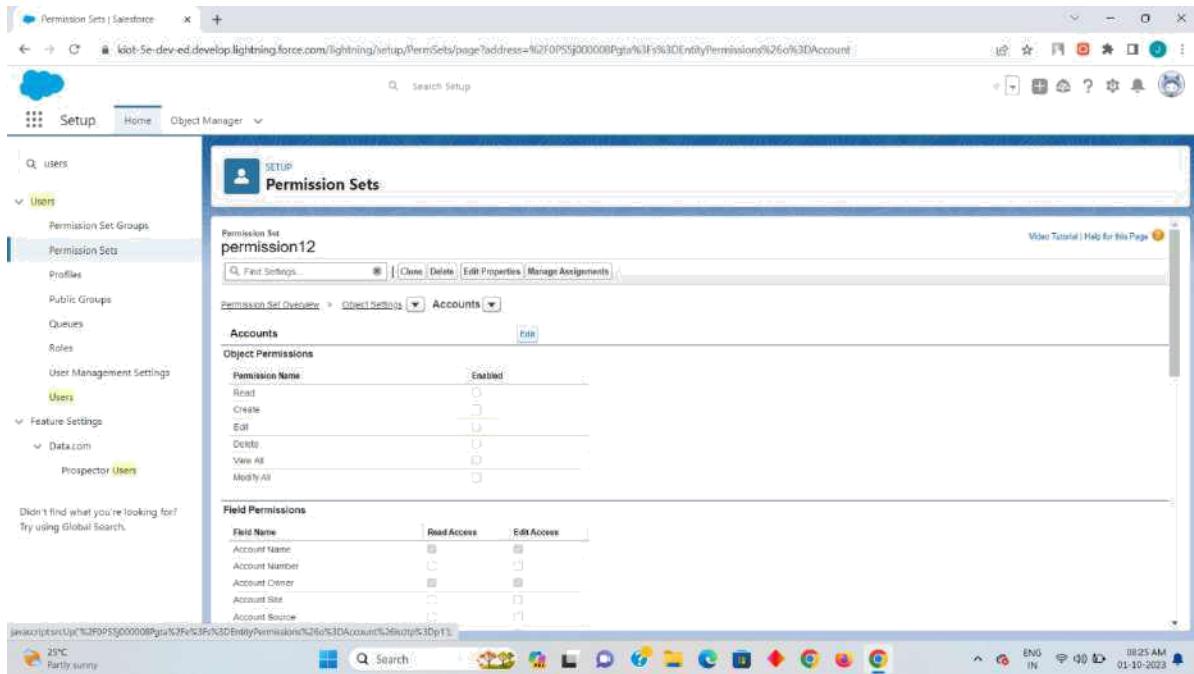
Object Permissions Total Fields Tab Settings

Object Permissions	Total Fields	Tab Settings
No Access	9	—
No Access	44	—
No Access	—	—
No Access	—	—
No Access	27	—
No Access	14	—
No Access	—	—
No Access	—	—
No Access	3	—
No Access	17	—
—	4	—
No Access	—	—
No Access	—	—
No Access	5	—
No Access	30	—
No Access	18	—

25°C Party sunny

Search

ENG IN 08:25 AM 01-10-2023



Step 7:

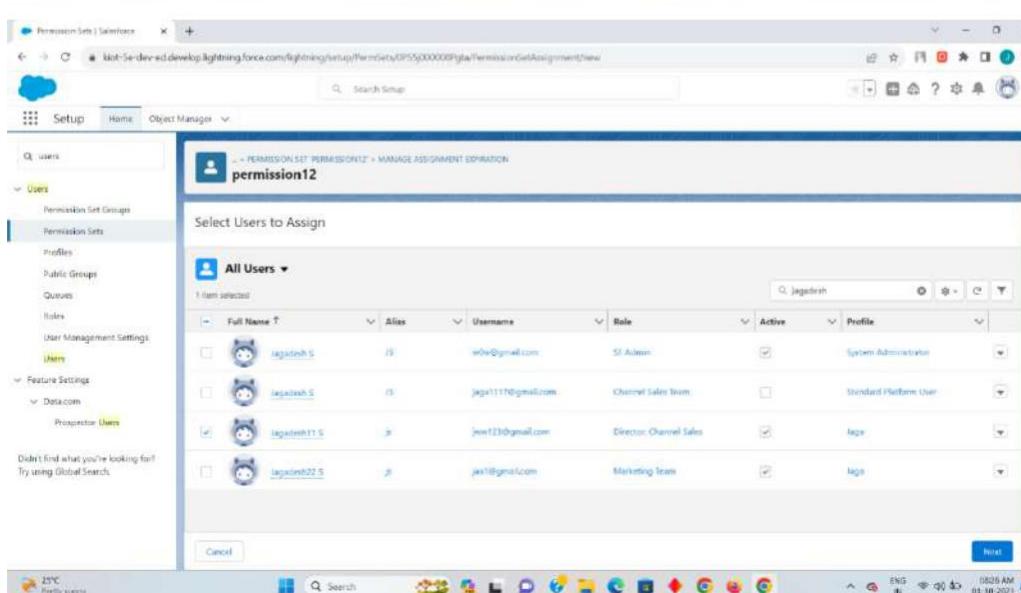
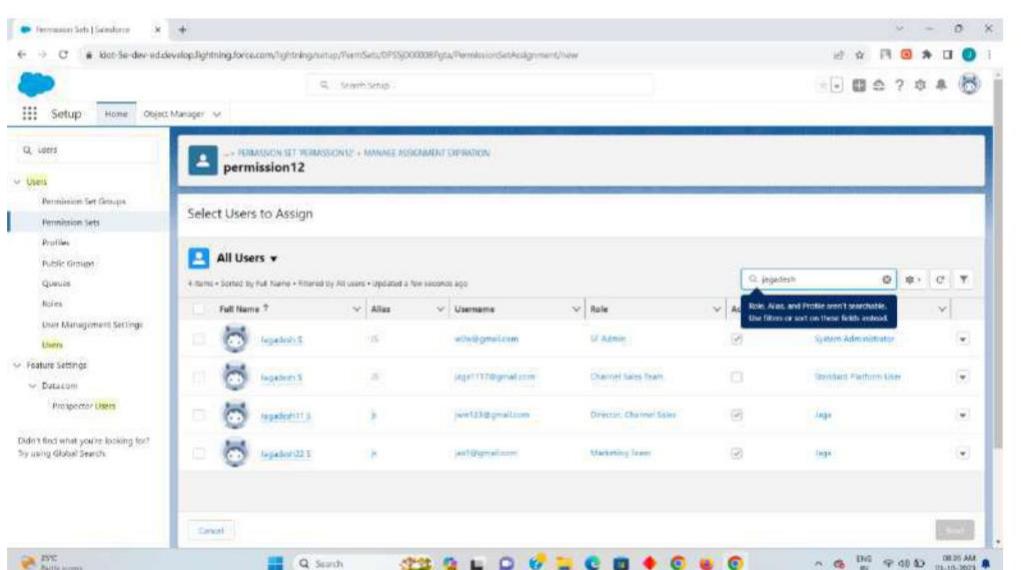
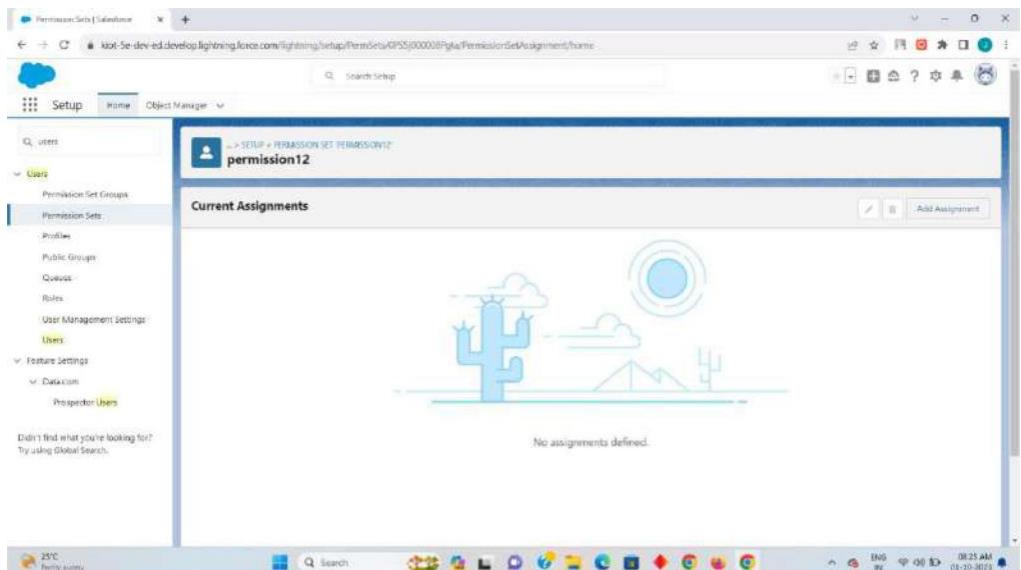
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

The screenshots illustrate the configuration of a Permission Set in Salesforce:

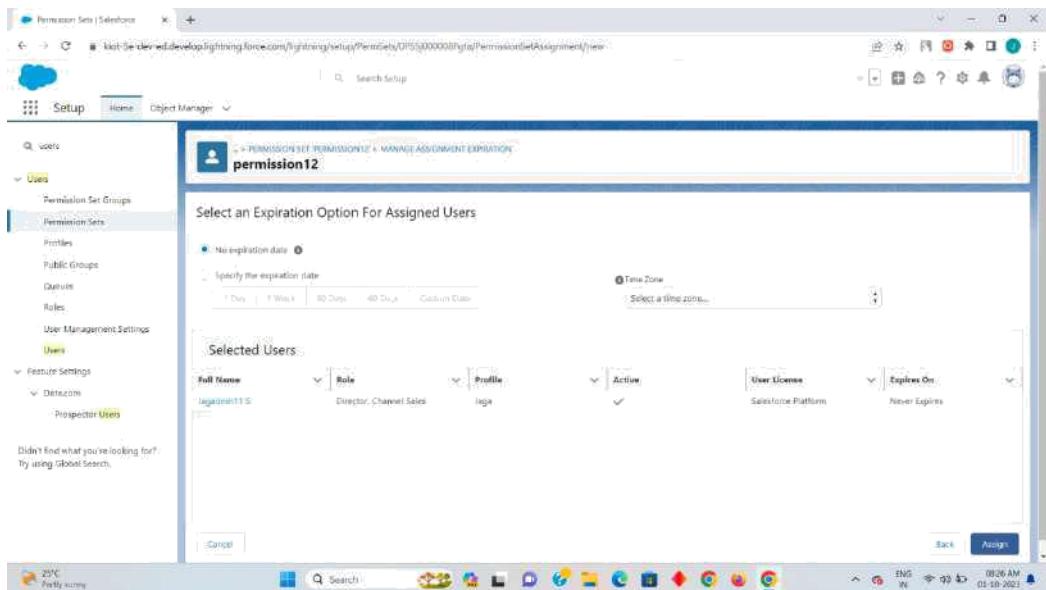
- Screenshot 1:** Shows the 'Object Permissions' section for the 'Accounts' object. Under 'Object Permissions', the 'Enabled' column is checked for all permissions: Read, Create, Edit, Delete, View All, and Modify All.
- Screenshot 2:** Shows the 'Object Permissions' section for the 'Accounts' object. Under 'Object Permissions', the 'Enabled' column is checked for Read, Create, Edit, and View All, while Delete and Modify All are unchecked.
- Screenshot 3:** Shows the 'Object Permissions' section for the 'Accounts' object. Under 'Object Permissions', the 'Enabled' column is checked for Read, Create, Edit, and Delete, while View All and Modify All are unchecked.

Step 8

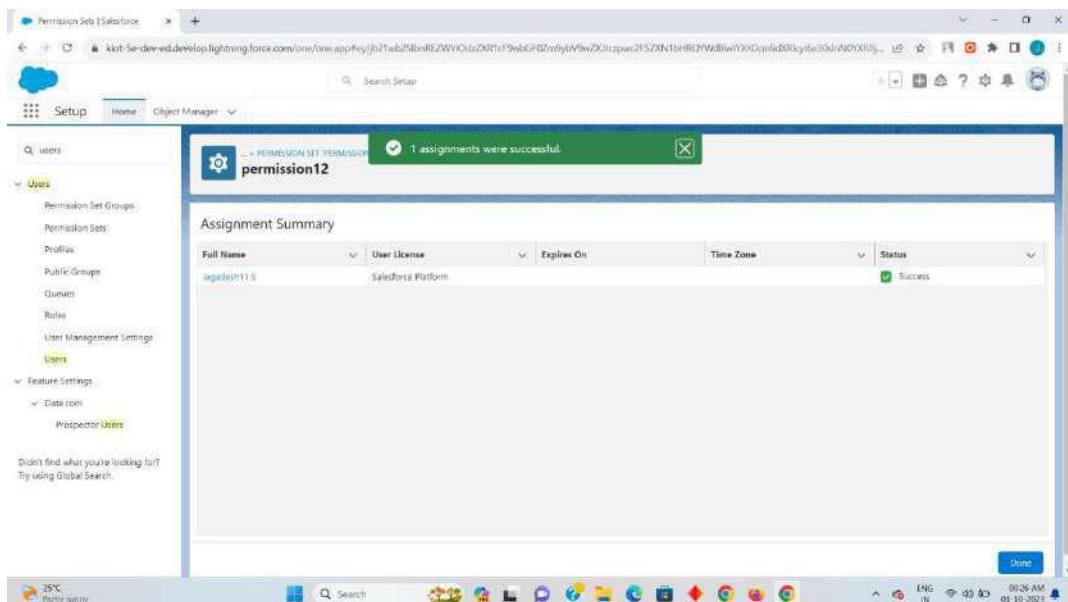
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



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**.

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

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

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

The screenshot shows the 'Email Template' page in Salesforce. The template is named 'Thank You Email - Survey'. The 'Details' tab is selected. The 'Information' section includes fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Related Entity Type' (set to 'Survey Result'), 'Description' (empty), and 'Folder' (set to 'Public Email Templates'). A note indicates it was 'Made in Email Template Builder'. The 'Message Content' section contains the subject 'Thank You For Completing Our Survey!' and the HTML body:

```
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
```

The 'Additional Information' section shows 'Created By' as Rakesh Gupta on 12/21/2020, 4:23 PM, and 'Last Modified By' as Rakesh Gupta on 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 Help for this Page ?

Survey - Thank You Email

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							
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>							
Edit Email Alert							
Description: Survey - Thank You Email Unique Name: Survey_Thank_You_Email <small>i</small> Object: Survey Result Email Template: Thank You Email - Survey <small>i</small> Protected Component: <input type="checkbox"/> Recipient Type: Search: User <input type="text" value="User"/> for: <input type="button" value="Find"/>							
Recipients <table border="1"> <thead> <tr> <th>Available Recipients</th> <th>Selected Recipients</th> </tr> </thead> <tbody> <tr> <td>User: Integration User User: Rakesh Gupta User: Security User</td> <td>Email Field: Email</td> </tr> <tr> <td style="text-align: center;"> <input type="button" value="Add"/> <input type="button" value="Remove"/> </td> <td></td> </tr> </tbody> </table>		Available Recipients	Selected Recipients	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email	<input type="button" value="Add"/> <input type="button" value="Remove"/>	
Available Recipients	Selected Recipients						
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email						
<input type="button" value="Add"/> <input type="button" value="Remove"/>							
You can enter up to five (5) email addresses to be notified. Additional Emails <input type="text"/>							
From Email Address: Current User's email address <small>i</small> <input type="checkbox"/> Make this address the default From email address for this object's email alerts. <small>i</small>							

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																				
Save Response	Save_Response																				
Description																					
<p>How Many Records to Create</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> One <input type="radio"/> Multiple <p>How to Set the Record Fields</p> <ul style="list-style-type: none"> <input type="radio"/> Use all values from a record <input checked="" type="radio"/> Use separate resources, and literal values 																					
<p>Create a Record of This Object</p> <p>* Object</p> <p>Survey Result</p>																					
<p>Set Field Values for the Survey Result</p> <table border="1"> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Comment__c</td> <td>← A_a Comment X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Email__c</td> <td>← A_a Email > Value X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Name__c</td> <td>← {!Name.firstName} {!Name.lastName}</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Rating__c</td> <td>← A_a Rating X</td> </tr> <tr> <td colspan="2">+ Add Field</td> </tr> <tr> <td colspan="2"><input type="checkbox"/> Manually assign variables</td> </tr> </table>		Field	Value	Comment__c	← A_a Comment X	Field	Value	Email__c	← A_a Email > Value X	Field	Value	Name__c	← {!Name.firstName} {!Name.lastName}	Field	Value	Rating__c	← A_a Rating X	+ Add Field		<input type="checkbox"/> Manually assign variables	
Field	Value																				
Comment__c	← A_a Comment X																				
Field	Value																				
Email__c	← A_a Email > Value X																				
Field	Value																				
Name__c	← {!Name.firstName} {!Name.lastName}																				
Field	Value																				
Rating__c	← A_a Rating X																				
+ Add Field																					
<input type="checkbox"/> Manually assign variables																					
<input type="button" value="Cancel"/> <input type="button" value="Done"/>																					

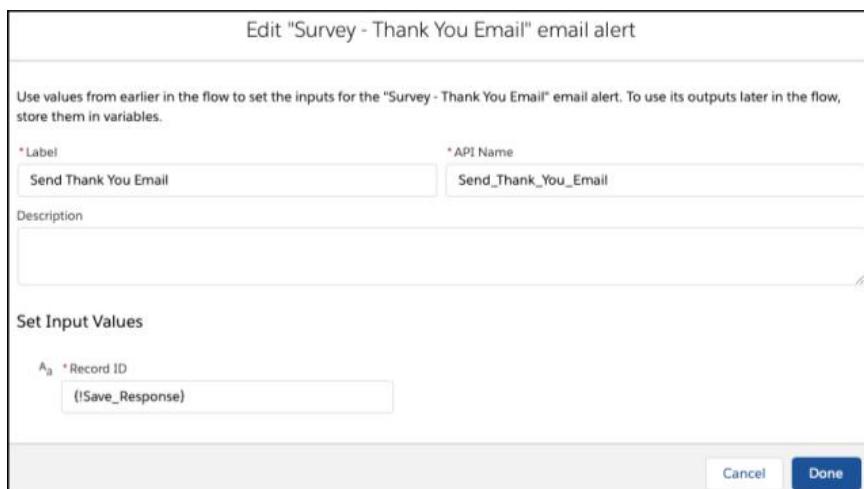
Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

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

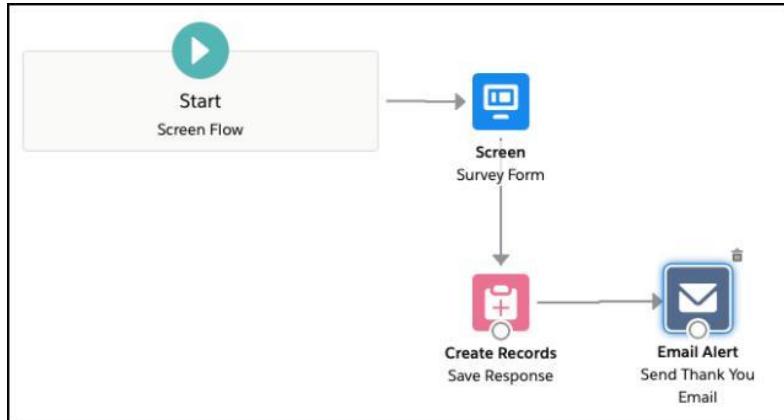
- 1.Under **Toolbox**, select **Element**.
- 2.Drag-and-drop **Action** element onto the Flow designer.
- 3.In the **Action** box, type **Survey – Thank You Email**.

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

5.Click Done.



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



1.Click **Save**.

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

3.Click **Show Advanced**.

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

5. Type: Screen Flow

6. API Version for Running the Flow: 51

7. Interview Label: Survey

{!\$Flow.CurrentDateTime}

8. Click Save.

Save as

A New Version A New Flow

* Flow Label * Flow API Name

Survey Survey

Description

Hide Advanced

How to Run the Flow i

User or System Context—Depends on How Flow is Launched

* Type

Screen Flow

* API Version for Running the Flow

51

Interview Label i

Insert a resource... 🔍

Survey {!\$Flow.CurrentDateTime}

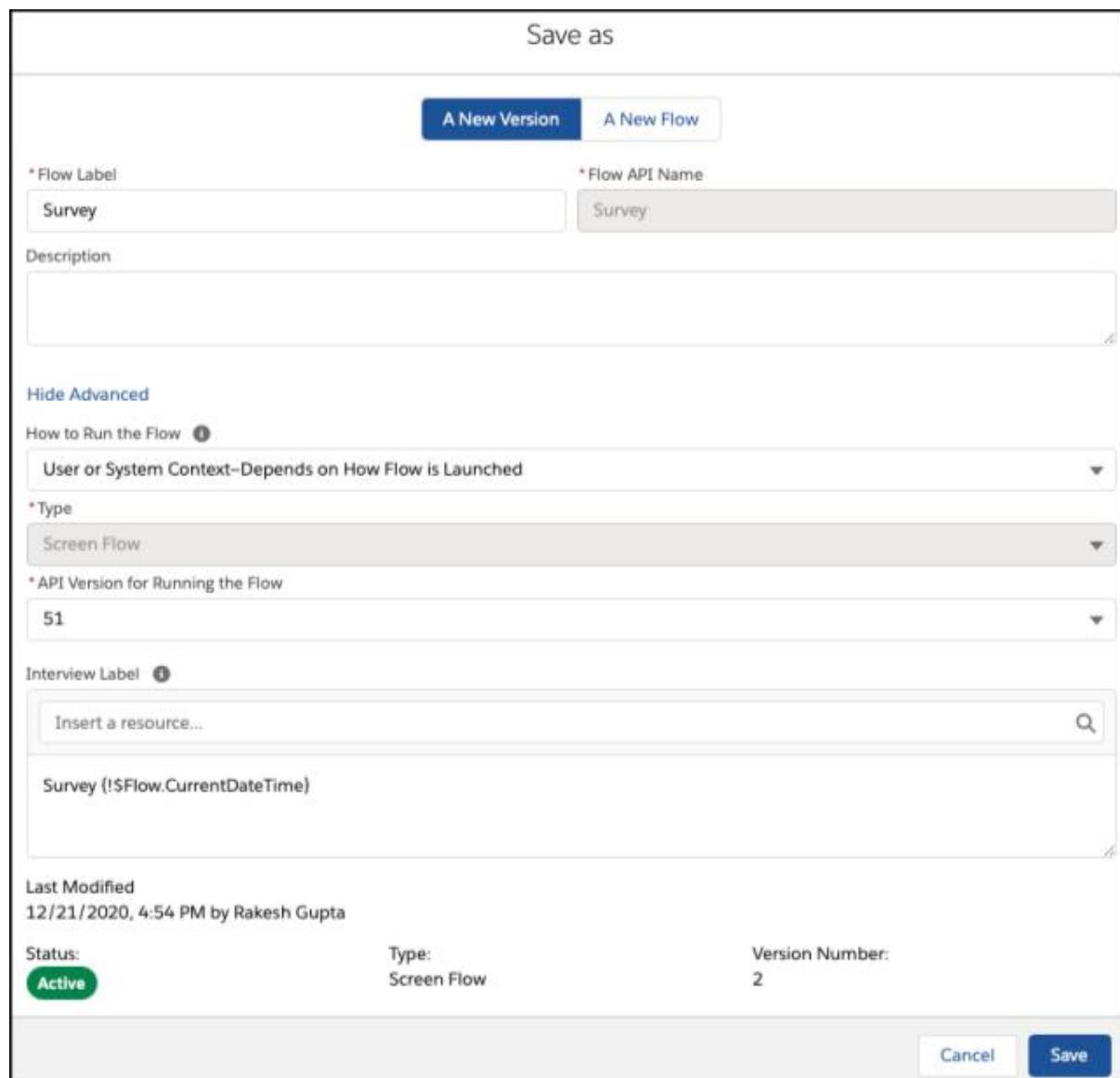
Last Modified
12/21/2020, 4:54 PM by Rakesh Gupta

Status: Active

Type: Screen Flow

Version Number: 2

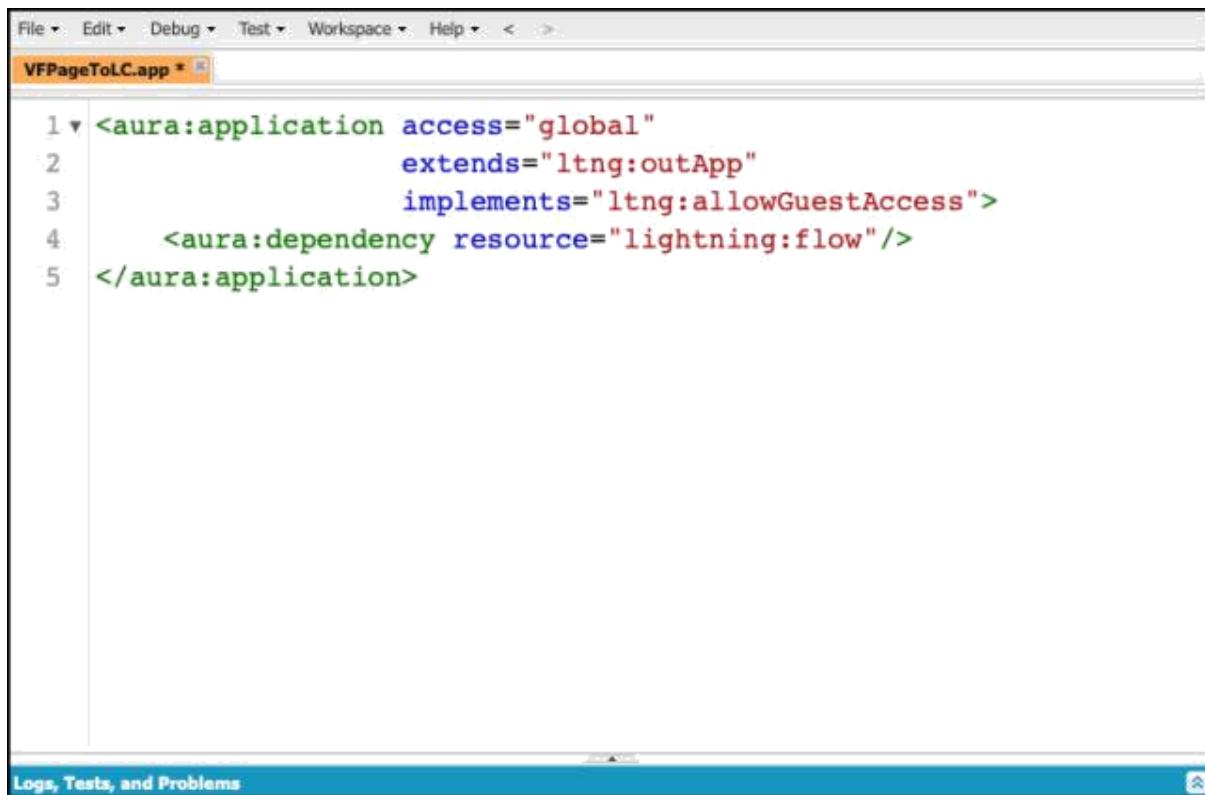
Cancel Save



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

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

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



The screenshot shows the Eclipse IDE interface with the following details:

- Toolbar:** File, Edit, Debug, Test, Workspace, Help.
- Title Bar:** VFPageToLC.app *
- Code Editor:** Displays the following Apex code:

```
1 <aura:application access="global"
2             extends="ltng:outApp"
3             implements="ltng:allowGuestAccess">
4     <aura:dependency resource="lightning:flow"/>
5 </aura:application>
```
- Bottom Status Bar:** Logs, Tests, and Problems

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**.

The screenshot shows the 'Visualforce Page' editor for a page named 'Survey'. The 'Page Information' section has 'Label' set to 'Survey' and 'Name' set to 'Survey'. Under 'Available for Lightning Experience, Experience Builder mobile, and the mobile app', the 'Checkmark' checkbox is checked. The 'Visualforce Markup' tab is selected, showing the following code:

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

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

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

1. Click **Setup**.

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

Site Edit

Save **Cancel**

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

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

Proof of Concept

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

Survey

Name

First Name
Alok

Last Name
Sinfal

* Email
[REDACTED]

* Rating
5

* Comment
Awesome Blog 

Next

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

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

 Survey Site Guest User via b9amq6fe7r-b-cdzwmaa.gs0.bnc.salesforce.com
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