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ASSIGNMENT

on

[SALESFORCE]

IMPLEMENTING CRM FOR RESULT

TRACKING OF A CANDIDATE WITH

INTERNAL MARKS

NAME – RAHUL A S.

NM ID -

C9BF323D2E3CFD8AA544C051EED74AAC

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.

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

- Header:** Search Setup, Home, Object Manager.
- Section:** SETUP / New Custom Object
- Custom Object Definition Edit:** Save, Save & New, Cancel.
- Custom Object Information:** Required Information (starts with vowel sound checked).
 - Label:** college (Example: Account)
 - Plural Label:** colleges (Example: Accounts)
 - Description:** (empty text area)
- Context Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (selected).
- Record Name:** college Name (Example: Account Name).
- Data Type:** Text.
- Optional Features:** Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, Enable Licensing (unchecked).
- 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. (Allow Sharing, Allow Bulk API Access, Allow Streaming API Access are checked).
- Deployment Status:** In Development (radio button selected).
- Search Status:** When this setting is enabled, your users can find records of this object type when they search. (Allow Search is unchecked).
- Object Creation Options:** Add Notes and Attachments related list to default page layout, Launch New Custom Tab Wizard after saving this custom object.

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

The screenshot shows the Salesforce Setup interface under the Object Manager tab. A message at the top states: "Permissions for this object are classified for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Continue this message again".

Custom Object Definition Edit

Custom Object Information

- Label: department (Example: Account)
- Plural Label: departments (Example: Accounts)
- Starts with vowel word:
- The Object Name is used when referencing the object via the API.
- Object Name: department (Example: Account)
- Description: (Empty text area)
- Custom Sensitive Help Setting:
 - Open the standard Salesforce.com help & training window
 - Open a window using a Visualforce page
- Custom 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)

Date Type: Text

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow In-Chatter Groups
- Enable Licensing

Object Classification

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

Allow Sharing

Allow DML 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 page layout.

Launch New Custom Tab Wizard after saving this custom object.

Save | Save & New | Cancel

Step 2: Create a Master-Detail Relationship

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

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

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

Setup | Home | Object Manager

CDepartment

Details

Fields & Relationships	Description
Page Layouts	API Name: CDepartment_c
Lightning Record Pages	Custom: ✓
Buttons, Links, and Actions	Singular Label: CDepartment
Compact Layouts	Plural Label: CDepartments
Field Sets	
Object Limits	Deployment Status: Deployed
Record Types	Help Setting: Standard salesforce.com Help Window
Related Lookup Filters	
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	

Edit | Delete

Setup | Home | Object Manager

CDepartment

Details

New Relationship

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

Help for this Page

Step 3 of 6

Previous Next Cancel

Field Label: college	Field Name: college
Description:	
Help Text:	
Child Relationship Name: CD_apartments	Sharing Settings:
	Select the minimum access level required on the Master record to create, edit, or delete related Detail records.
	<input checked="" type="checkbox"/> Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
	<input type="checkbox"/> Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow Reparenting:	<input type="checkbox"/> Child records can be reparented to other parent records after they are created.
Auto add to custom report type:	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity.
Lookup Filter	

The top screenshot shows the 'New Relationship' wizard for the 'CDepartment' object. Step 2, 'Choose the related object', is displayed. The 'Related To' dropdown is set to 'College'. The bottom screenshot shows the 'New Custom Field' wizard for the 'CDepartment' object. Step 1, 'Choose the Field type', is displayed. The 'Data Type' section is open, showing various options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary' (selected), 'Lookup Relationship', 'Master-Detail Relationship' (selected), and 'External Lookup Relationship'.

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.

The screenshot shows the Salesforce Setup interface for the 'CDepartment' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Fields & Relationships' and displays a table with four items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are:

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

Setup Home Object Manager

Q Search Setup

User Interface

Rename Tabs and Labels

Custom Tabs

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

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Book	Box	
Edit Del	Research_Proposal	Orange	
Edit Del	student	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.

Help for this Page

Setup Home Object Manager

SETUP > OBJECT MANAGER college

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 6: Add to page layouts Step 6 of 6

Field Label: Total count
Data Type: Rollup Summary
Field Name: Total_count
Description:

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

Add Field - Page Layout Name: college Layout

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

Previous Save & New Save Cancel

New Custom Field

Step 4: Establish field-level security

	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 Roles 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"/>
Franchise - Ann Reservation User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

New Custom Field

Step 3: 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

Setup > Object Manager college

New Custom Field

Step 2: Enter the details

Field Label: (1)

Field Name: (1)

Description:

Help Text:

Auto add to custom report type: Add this field to existing custom report types that contain this entity (1)

Step 1: Choose the field type

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

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Picklist Allows users to select a True (checked) or False (unchecked) value.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'college'. On the left, a sidebar lists various configuration options under 'Fields & Relationships'. The main content area is titled 'Fields & Relationships' and displays four items, sorted by Field Label. A table provides details for each field:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(50)		✓
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.

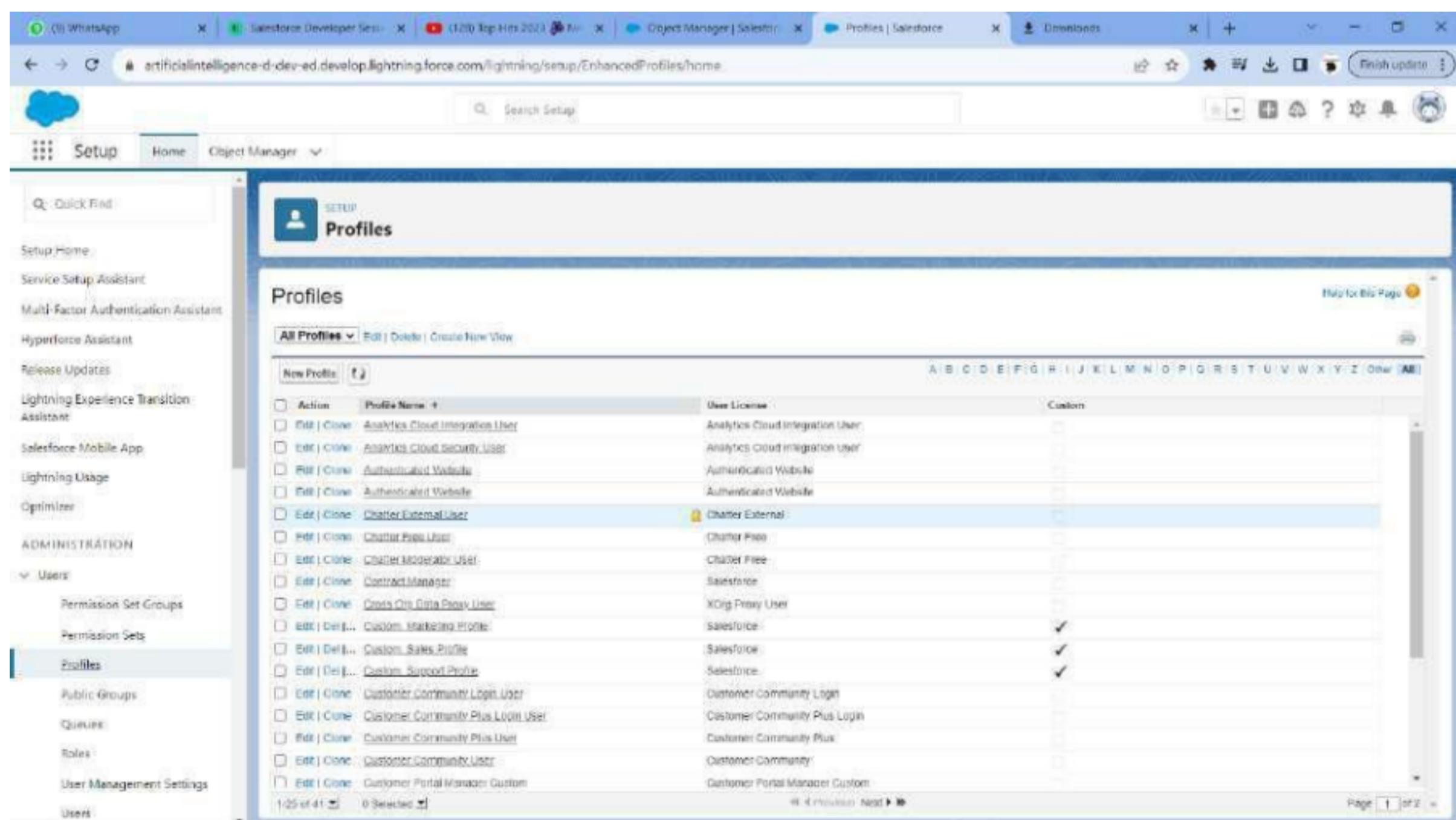
11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main title is 'New Custom Object Tab'. Below it, the sub-section 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 interface lists various user profiles on the left, and on the right, there are dropdown menus for 'Tab Visibility' next to each profile name. At the bottom right, there 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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main area displays a list of profiles. The 'Chatter External' profile is selected, indicated by a blue highlight. The list includes various standard and custom profiles such as 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authorized Website', 'Chatter External', 'Chatter Free', 'Chatter Moderator', 'Contract Manager', 'Custom Org Data Sync User', 'Custom Marketing Profile', 'Custom Sales Profile', 'Customer Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'User License' column shows the license type for each profile, and the 'Actions' column provides options to edit or clone each profile.

profiles, one for User A and one for User B.

The screenshot shows the Salesforce Setup interface under the Profiles section. 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 the Profiles section, there are links for Permission Set Groups, Permission Sets, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area displays a table titled "Profiles" with columns for Action, Profile Name, User License, and Contact. The table lists several profiles, including "Salesforce API Only System Integrator" (User License: Salesforce Integration), "Standard Platform User" (User License: Salesforce), "Salesforce Manager" (User License: Salesforce), "Standard Platform User" (User License: Salesforce-Platform), "Standard User" (User License: Salesforce), and "System Administrator" (User License: Salesforce). A "Help for this Page" link is located in the top right corner.

The screenshot shows the Salesforce Setup interface under the Profiles section. 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 the Profiles section, there are links for Permission Set Groups, Permission Sets, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area displays a "Clone Profile" form. It prompts the user to "Enter the name of the new profile" and "You must select an existing profile to clone from." A table shows an existing profile: "Standard Platform User" (User License: Salesforce-Platform) with a "Profile Name" field containing "Salesforce". Below the table are "Save" and "Cancel" buttons. A "Help for this Page" link is located in the top right corner.

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

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

Profile 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.

Log In Pages (2) | Enabled User Class Access (8) | Enabled Visualforce Page Access (3) | Enabled External Data Source Access (3) | Enabled Shared Credential Access (3) | Enabled External Credential Principal Access (3) | Enabled Custom Metadata Type Access (3) | Enabled Custom Setting Definition Access (2) | Enabled Plan Access (3) | Enabled Service Processor Status Access (3) | Enabled Custom Permissions (3)

Profile Detail

Name:	Manager	User License:	Salesforce Platform	Custom Profile:	<input checked="" type="checkbox"/>
Description:		Created By:	GOPAL S 01/10/2023, 7:00 pm	Modified By:	GOPAL S 01/10/2023, 7:00 pm

Page Layouts

Standard Object Layouts	Global	Operating Hours
Email Application	GLOBAL LAYOUT [View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout	Non Assigned [View Assignment]	Order Layout [View Assignment]
Account	Home Page Default [View Assignment]	Order Product Layout [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Payment Layout [View Assignment]
Appointment Invitation	Alternative Payment Method Layout [View Assignment]	Payment Authorization Layout [View Assignment]
Asset	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
	Asset Layout [View Assignment]	Payment Gateway Layout [View Assignment]

Profiles

Manager

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

	Visible	Default		Visible	Default	
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>		Platform (standard__Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLaunched)	<input type="checkbox"/>	<input type="radio"/>		WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
Kit (Kit)	<input checked="" type="checkbox"/>	<input type="radio"/>				

Service Provider Access

Overwrite users' personal tab customizations:

Tab Settings

Home	Default On	Leaving	Default On
Accounts	<input checked="" type="checkbox"/>	<input type="radio"/>	Libraries
Alert Settings	<input type="radio"/>	<input type="checkbox"/>	Tab Hidden
			Lightning Bolt Solutions

Custom Object Permissions

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

Enhancement Requests

Object	Basic Access	Data Administration
Bank	<input type="checkbox"/>	<input type="checkbox"/>
customers	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Profiles

Communication Subscription Channel Types

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

Custom Object Permissions

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

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Salesforce Developer Session

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ8z%2F&%3FreURL1963D%252F00e5j0...

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

SETUP Profiles

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Sellers

Streaming Channels

User External Credentials

Custom Object Permissions

Bank

customers

Basic Access

Data Administration

Read Create Edit Delete View All Modify All

Enhancement Requests

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 35 minutes

Obfuscate secret answers for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Salesforce Developer Session

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ8z%2F&%3FreURL1963D%252F00e5j0...

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

SETUP Profiles

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Sellers

Streaming Channels

User External Credentials

Custom Object Permissions

Bank

customers

Basic Access

Data Administration

Read Create Edit Delete View All Modify All

Enhancement Requests

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obfuscate secret answers for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Salesforce Developer Session

Object Manager | Salesforce

Profiles | Salesforce

Setup Home

Service Setup Assistant

Multifactor 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

Custom Object Permissions

Basic Access

Data Administration

Enhancement Requests

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 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

Obfuscate secret answer for password reset: Off

Require a minimum 1 day password lifetime: Off

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

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

All Users

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

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

View: [All Users](#) | [Edit | Create New User](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adam Dix	dades	test_dix_1as.2tbbn7f9ulk.tzccro3eza.3af7bfewmhi0t0kzw6@mail.com		<input checked="" type="checkbox"/>	IS User
<input type="checkbox"/> Edit	Chatter Friend	Chatter	chatr-00100000000000000000000000000000@mail.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Eltona Amelia	elti	amelia.eltona.1.48acc9000006ce0dca-1wh-1mbdermwh-0000000000000000@mail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S.GLOBAL	SG	sg020@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration-0001500000000000@mail.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	isay@passwithit@0001500000000000@mail.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Developer Session - artificialintelligence-d-dev-ed.lightning.force.com

Users | Salesforce

Setup Home Object Manager

Users

New User

User Edit

General Information

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

Role: <None Specified>
User License: Salesforce Integration
Profile: Salesforce API Only System Integrations
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Data.com User Type: -None-
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:
Load Lightning Pages While Scrolling:
Debug Mode:

Salesforce Developer Session - artificialintelligence-d-dev-ed.lightning.force.com

Users | Salesforce

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name: Sowmya
Last Name: Balaji
Alias: Sowmya
Email: 2k20cse179@kot.ac.in
Username: 2k21n@kot.ac.in
Nickname: User161616771282564526
Title: worker
Company: Kot bank
Department:
Division:

Role: <None Specified>
User License: Salesforce Platform
Profile: Manager
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Data.com User Type: -None-
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:
Load Lightning Pages While Scrolling:
Debug Mode:

Screenshot of the Salesforce Setup interface showing the User detail page for 'sowmya bala'. The user has the following details:

Field	Value
Name	sowmya bala
Alias	sbala
Email	2k21@kiot.ac.in (sbala)
Username	2k21@kiot.ac.in
Nickname	User199107712920642616
Title	sohner
Company	kiot bank
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	Only if I am an approver
Notification ID	
App Registration One-Time Password	
App Registration Salesforce Authentication	

The user is assigned to the 'Salesforce Perform Manager' profile and has the 'Active' status checked. Other profile options listed include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDX User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palettes on Charts, Load Lightning Pages While Scrolling, and Salesforce CRM Content User.

Below the user detail page, a welcome email from Salesforce is shown in the Gmail inbox. The email subject is 'Welcome to Salesforce!' and contains a link to verify the account at <https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>. The email also displays the recipient's username as 2k21@kiot.ac.in.

(1) WhatsApp X (2) Salesforce Dev X (3) (28) Top Folders X (4) Object Manager X (5) User | Sales X (6) Downloads X (7) Welcome to X (8) Recently Viewed X (9) Change Your X + - X X

Finish update

salesforce

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password: Good

* Confirm New Password: Match

Security Question: In what city were you born?

* Answer: salem

Change Password

Password was last changed on 01/10/2023, 7:22 pm.

Login | Salesforce X +

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

Incognito Finish update

salesforce

Username: 2k21it@kiot.ac.in

Password:

Log In

Remember me.

[Forgot Your Password?](#)

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

WATCH ON DEMAND



AIDay

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Recently Viewed | Bank | Salesfo... X +

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

DISPLAY DENSITY

Comfy

Compact

OPTIONS

Switch to Salesforce Classic

Add Username

New Bank | Salesforce X +

artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/o/Bank__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST.VIEW&id=1...

meCW Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

* = Required Information

Information	Owner
Bank Name bcf	sowmiya bala
Phone No 0897754554	

Cancel Save & New Save

The screenshot displays two overlapping Salesforce Lightning pages. The top page is a 'New customer' form titled 'New customer'. It contains fields for 'customer Name' (set to 'madhu') and 'Bank' (set to 'boi'). A note at the top right indicates that 'Bank' is a required field. The bottom page shows the details of the newly created customer record, 'madhu'. The record's name is 'madhu', and it is associated with the bank 'boi'. The creation message 'customer "madhu" was created.' is visible. Both pages have a header bar with tabs like 'MECW', 'Rank', 'customers', and 'Home'.

The screenshot shows the Salesforce Setup interface under the Profiles section. 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 the Profiles section, there are links for Permission Set Groups, Permission Sets, Public Groups, Queues, Roles, User Management Settings, and a New Profile button. The main content area displays a table of profiles:

Action	Profile Name	User License	Custom
Edit Clone	Salesforce API Only System Integrator	Salesforce Integration	
Edit Clone	Salesforce	Salesforce	
Edit Clone	Silver Partner	Silver Partner	
Edit Clone	Salesforce	Salesforce	
Edit Clone	Salesforce Platform	Salesforce Platform	
Edit Clone	Standard User	Standard User	
Edit Clone	Standard Platform User	Standard Platform User	
Edit Clone	Standard	Standard	
Edit Clone	System Administrator	System Administrator	

The screenshot shows the Salesforce Setup interface under the Profiles section. 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 the Profiles section, there are links for Permission Set Groups, Permission Sets, Public Groups, Queues, Roles, User Management Settings, and a Clone Profile button. The main content area displays a Clone Profile form:

Error: You must select an existing profile to clone from.

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

Save Cancel

Salesforce Developer Session 2 | Top Hits 2023 | New Proj | Profiles | Salesforce | Welcome to Salesforce: Verify | Refresh update

Setup Home Object Manager

Quick Find Search Setup

Profiles

salesmanage

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.

Log In Status (2) | Enabled User Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Shared Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definition Access (0) | Enabled File Access (0) | Enabled Service Pipeline Static Access (0) | Enabled Custom Permissions (0)

Profile Detail

Name	salesmanage	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	GOPAL_E 01/10/2023, 7:19 pm	Modified By	GOPAL_E 01/10/2023, 7:19 pm

Page Layouts

Standard Object Layouts	Global	Operating Hours
Email Application	Global Layout [View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout	No Assignment [View Assignment]	Order Layout [View Assignment]
Account	Home Page Default [View Assignment]	Order Product Layout [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Payment Layout [View Assignment]
Appointment Invitation	Alternative Payment Method Layout [View Assignment]	Payment Authorization Layout [View Assignment]
Asset	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
	Asset Layout [View Assignment]	Payment Gateway Layout [View Assignment]

Salesforce Developer Session 2 | Top Hits 2023 | New Proj | Profiles | Salesforce | Welcome to Salesforce: Verify | Refresh update

Setup Home Object Manager

Quick Find Search Setup

Profiles

salesmanage

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite user's personal tab customizations

Standard Tab Settings

Home	Default On	Leaving	Default On
------	------------	---------	------------

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

SEARCH Setup Profiles

Custom Object Permissions

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

Enhancement Requests

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

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

SEARCH Setup Profiles

Custom Object Permissions

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

Enhancement Requests

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Save Save & New Cancel

Setup Home Object Manager

Q user

v Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
v Feature Settings
v Datacom
Prospector Users
v Service
v Embedded Service
Messaging for In-App and Web User Verification
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Action Link Templates
Actions & Recommendations
App Menu

SETUP Users

New User

User Edit

General Information

Save Save & New Cancel

First Name: [] Last Name: [] Role: <None Specified>
Alias: [] User License: Salesforce Integration
Email: [] Profile: Salesforce API Only System Integrations
Username: [] Active:
Nickname: [] Marketing User:
Title: [] Offline User:
Company: [] Knowledge User:
Department: [] Flow User:
Division: [] Service Cloud User:

Sales.com Contributor User:
Sales.com Publisher User:
WDC User:
Data.com User Type:
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:
Load Lightning Pages While Scrolling:
Debug Mode:

Setup Home Object Manager

Q user

v Users

Permission Set Groups
Permission Sets
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SETUP Users

New User

User Edit

General Information

Save Save & New Cancel

First Name: madhu Last Name: b Role: <None Specified>
Alias: mb User License: Salesforce Platform
Email: 2k20case179@kiot.ac.in Profile: SalesManager
Username: 2k20case179@kiot.ac.in Active:
Nickname: User-169616042420854199 Title: worker
Company: kiot bank Department: Sales
Division:

Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Sales.com Contributor User:
Sales.com Publisher User:
WDC User:
Data.com User Type:
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:
Load Lightning Pages While Scrolling:
Debug Mode:

Salesforce Developer Session 2 | Top 100s 2023 | New Relic | Users | Salesforce | Welcome to Salesforce Verify | Finish update

Setup Home Object Manager

Q 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

SETUP

Users

Mailing Address

Street: 41/94, Ananthapuri, Uthamalakurram, SALEM, 636308, TAMIL NADU, India

City: SALEM

Zip/Postal Code: 636308

State/Province: TAMIL NADU

Country: India

Single Sign On Information

Federation ID: [empty]

Locale Settings

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

Locale: English (India)

Language: English

Approver Settings

Delegated Approver: [empty]
Manager: [empty]

Receives Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately

Save Save & Now Cancel

Salesforce Developer Session 2 | Top 100s 2023 | New Relic | Users | Salesforce | Welcome to Salesforce Verify | Finish update

Setup Home Object Manager

Q user

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
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User Management Settings
Users
Feature Settings
Datacom
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
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Actions & Recommendations
App Menu

SETUP

Users

Mailing Address

Street: 41/94, Ananthapuri, Uthamalakurram, SALEM, 636308, TAMIL NADU, India

City: SALEM

Zip/Postal Code: 636308

State/Province: TAMIL NADU

Country: India

Single Sign On Information

Federation ID: [empty]

Locale Settings

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

Locale: English (India)

Language: English

Approver Settings

Delegated Approver: [empty]
Manager: [empty]

Receives Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately

Save Save & Now Cancel

Screenshot of the Salesforce Setup interface showing the User Management Settings section, specifically the Users page for a user named "machu b".

The User Detail section displays the following information:

Field	Value
Name	machu b
Alias	mb
Email	2k20csit@kiot.ac.in (machu)
Username	2k20csit@kiot.ac.in
Nickname	User1991044242005115206
Title	sophier
Company	not bank
Department	sales
Division	
Address	4/194, anampalayam, umhamasapuram, Parakkodu, salem- 636308 TAMIL NADU 636308
Time Zone	(GMT +05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approvals	Manager
Receive Approval Request Emails	Only I'm an approver
Registration ID	
App Registration One-Time Password	

The Role section shows the user is assigned to the "Salesforce Platform" profile and has the "Salesforce Admin" permission set.

The Gmail inbox shows an incoming email from Salesforce with the subject "Welcome to Salesforce!" containing a verification link and instructions.

Change Your Password | Sales... X +

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



Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password:
***** Good

* Confirm New Password:
***** M3001

Security Question:
* In what city were you born?
India

Change Password

Password was last changed on 01/10/2023, 7:29 pm.

Recently Viewed | Bank | Sales... X +

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

MECW

meow Bank customers Home

Q Search...

Bank Recently Viewed New

0 items • Updated a few seconds ago

Bank Name

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

List View

Recently Viewed | customers | +

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

MECW

mebw Rank customers Home

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 Salesforce Developer Series Top HITS 2023 Permission Sets | Salesforce Welcome to Salesforce! Reset Password | Salesforce

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Retention Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospector Users

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Messaging for In-App and Web User

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Actions & Recommendations

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	License
<input type="checkbox"/>	Access to activity	Allows access to the store. Lets users see products and categories... Includes all buyer capabilities, and allows access to manage carts and creates that the user is a Sales Cloud or Service Cloud user.	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Guest		B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer Manager		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	Manage Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use 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"/>	Expense Profile Manager	Lets users create, read, edit, and delete iterations, allocations, quota.	Salesforce
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/>	FieldServicesVoucherIncentiveManager	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	Merchandise	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management, Operations Manager	Limited access to Order Management features for Staff Server.	Lightning Order Management User
<input type="checkbox"/>	Order Management, Shopper		

1-25 of 29 0 Selected

Page 1 of 2

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

with User B.

Ownership:

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

their records and User B owning their

records. Organization-Wide Defaults:

- Set the organization-wide defaults for the Account object to "Private" to ensure that

records are private by

default. Testing:

- Test the setup by logging in as User A and User B separately to verify that they cannot

access each other's records.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main content area displays a table of permission sets. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. The 'Description' column contains detailed explanations for each permission set, such as 'Allows access to the store. Lets users see products and categories. Includes all Buyer capabilities.' for the 'Buyer' permission set. The 'License' column indicates which license is required for each set, such as 'B2B Buyer Permission Set One Seat' for the 'Buyer' set. The table shows 125 permission sets listed, with the current page being page 1 of 2.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del Clone	Access to activity	Allows access to the store. Lets users see products and categories. Includes all Buyer capabilities.	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer	Includes all Buyer capabilities, and allows access to manage carts and orders that the user is a Sales Cloud or Service Cloud user.	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Allow access to commerce admin features.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact_Center Admin	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact_Center Agent	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact_Center Supervisor	Lets users create, read, edit, and delete instances, subscriptions, events, and more.	Salesforce
<input type="checkbox"/> Del Clone	Commerce Profile Manager	Give your mobile workforce access to the Field Service mobile app. See Field Service mobile .	Field Service Mobile
<input type="checkbox"/> Clone	FieldServiceMobileStandardPermissionSet	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/> Clone	Merchandise	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Agent	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Operations Manager	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Shipment	Limited access to Order management features for Self Service.	Lightning Order Management User

Setup Home Object Manager

Q user

v Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

v Feature Settings

v Datacom

Prospector Users

v Service

v Embedded Service

Messaging for In-App and Web User

Verification

v User Interface

Action Link Templates

Actions & Recommendations

App Menu

SEARCH Setup

Permission Sets

Permission Set Create

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

- Choose «None» if you plan to assign this permission set to multiple users with different user and permission set licenses.

- Choose a specific user license if you want users with only one license type to use this permission set.

- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

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

Licenses: - None -

Save Cancel

Setup Home Object Manager

Q user

v Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

v Feature Settings

v Datacom

Prospector Users

v Service

v Embedded Service

Messaging for In-App and Web User

Verification

v User Interface

Action Link Templates

Actions & Recommendations

App Menu

SEARCH Setup

Permission Sets

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](#).

Licenses: - None -

Save Cancel

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

The sidebar navigation includes:

- Q 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

Permission Sets

Permission Set salesmanager

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

Permission Set Overview

Description

Licenses

Session Activation Required

Last Modified By: QORAL S. 01/10/2023, 7:29 pm

API Name: salesmanager

Namespace Prefix:

Created By: QORAL S. 01/10/2023, 7:29 pm

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Car Owners"

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

File Access

Permissions to execute Finsch

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

Learn More

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

The sidebar navigation includes:

- Q 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

Permission Sets

Permission Set salesmanager

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

Permission Set Owner: > Object Settings

Object Settings

Object Name

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	-
AltInvest Reasons	No Access	--	-
AltInvest Insights	No Access	--	-
Alternative Payment Methods	No Access	27	-
API Analytics Event Stores	No Access	14	-
API Analytics Query Requests	No Access	--	-
Appointment Use or Assignments	No Access	--	-
Appointment Categories	No Access	9	-
Appointment Invitations	No Access	17	-
Appointment Invites	--	4	-
Appointment Schedule Alignments	No Access	--	-
Appointment Schedule Logs	No Access	--	-
Appointment Time Slots	No Access	6	-
Asset Actions	No Access	30	-
Asset Action Sources	--	10	-
Asset Hierarchies	--	10	-
Assets	No Access	42	-
Asset State Versions	No Access	11	-

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

The 'Object Permissions' section shows the following settings:

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

The 'Field Permissions' section shows the following settings:

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

Screenshot of the Salesforce Permission Sets page for the 'salesmanager' permission set after changes have been made.

The 'Object Permissions' section now includes checked checkboxes for 'Read' and 'View All'.

The 'Field Permissions' section remains the same as the previous screenshot.

Salesforce Setup screen showing the 'Current Assignments' section for the 'salesmanager' permission set. The sidebar on the left is expanded to show 'Users' under 'Permission Sets'. The main area displays a cactus and sun icon with the message 'No assignments defined'.

Salesforce Setup screen showing the 'Select Users to Assign' interface. The sidebar on the left is expanded to show 'Users' under 'Permission Sets'. The main area lists users with checkboxes for selection. One user, 'mathu b', has a checkbox checked and is highlighted with a blue border. Other users listed include 'Amelia Ellington', 'Chatter Expert', 'Disha Adarina', 'ocean s', 'Integration User', 'Security User', and 'severlyn hair'.

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/DPSS/000008Phk/PermissionSetAssignment/new

Select an Expiration Option for Assigned Users

No expiration date.

Specify the expiration date

Time Zone

Selected Users

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

Cancel

Back Assign

Search Setup

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

artificialintelligence-d-dev-ed.lightning.force.com/one/one.app#key=jb21wb25b7mREZwYI0izZXK1c59wbGf0ZmDybV9wZXltczpwcf5ZDN1blIRQYWdliw...

Search Setup

PROMOTION SET: SALESMANAGER

salesmanager

1 assignments were successful.

Assignment Summary

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

Done

Search Setup

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

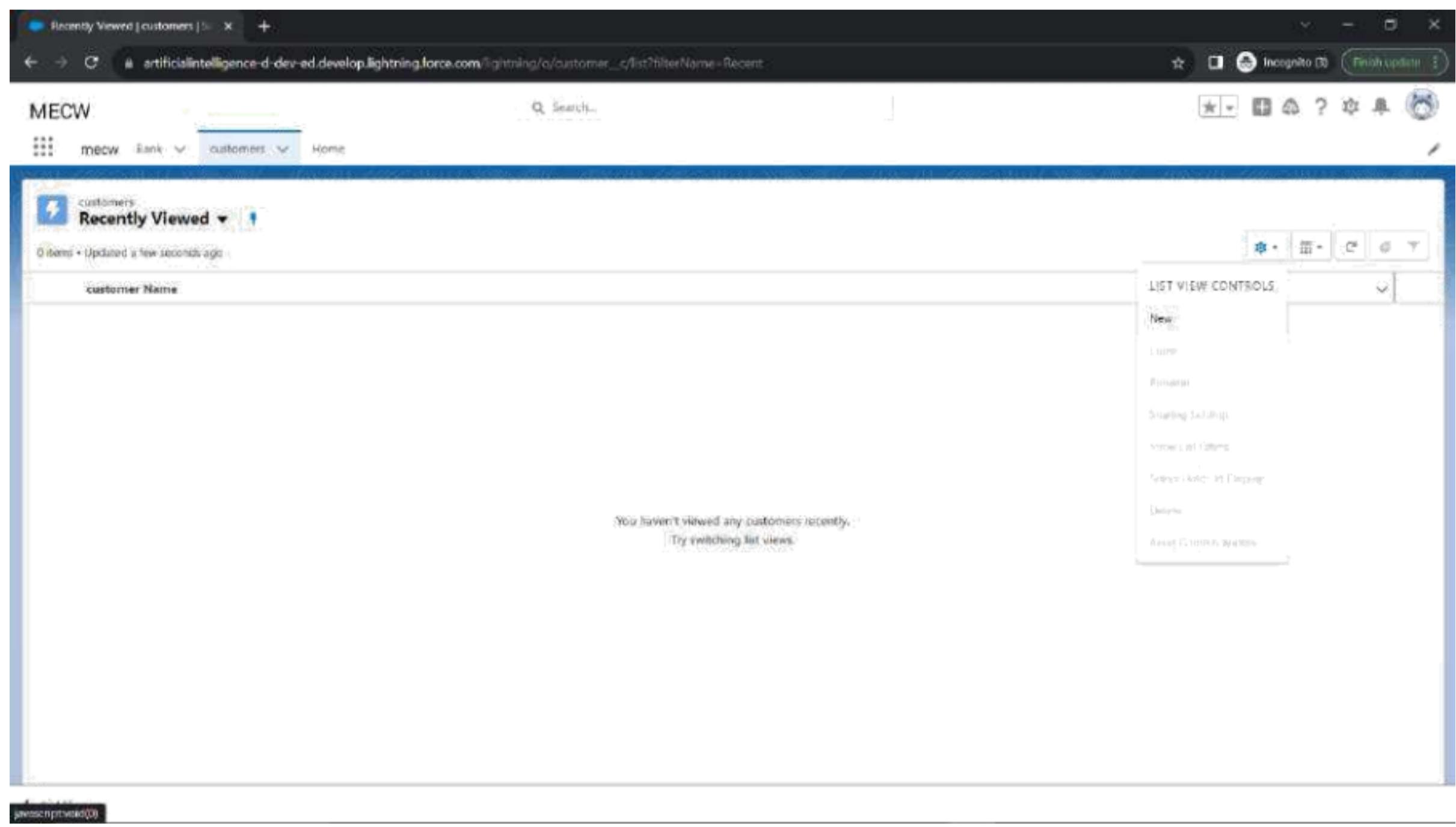
Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu



recentlyViewed

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]

Profiles | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e%3FisDeleteRedirect%3Dtrue%26setupid%3DEnhancedProfiles

Setup Home Object Manager

Search Setup

Users Profiles

Profiles

All Profiles Edit | Delete | Create New View

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

1-25 of 41 0 Selected

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

Help for this Page

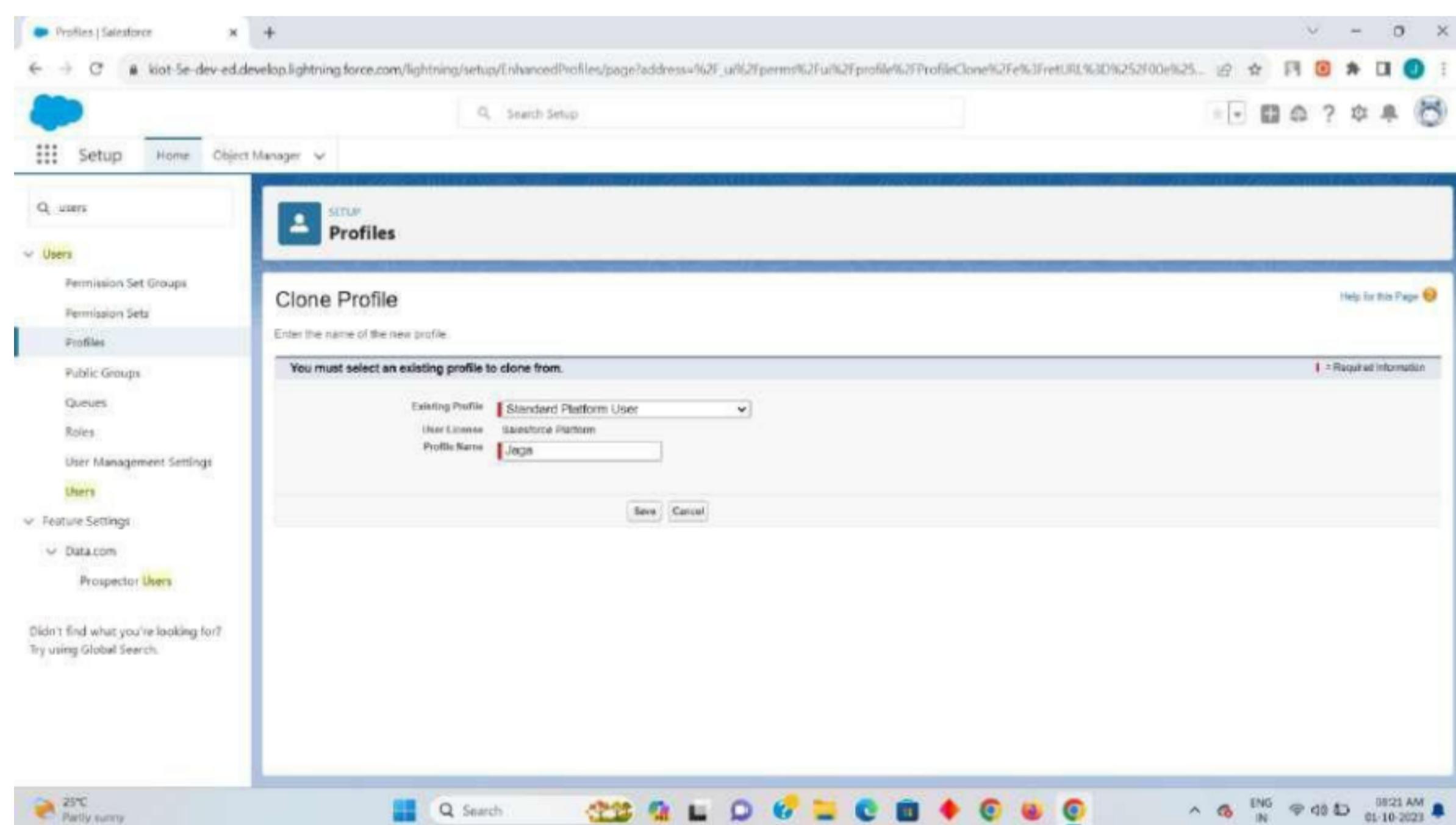
25°C Partly sunny

Search

ENGLISH 08:20 AM 01-10-2023

Step 2:

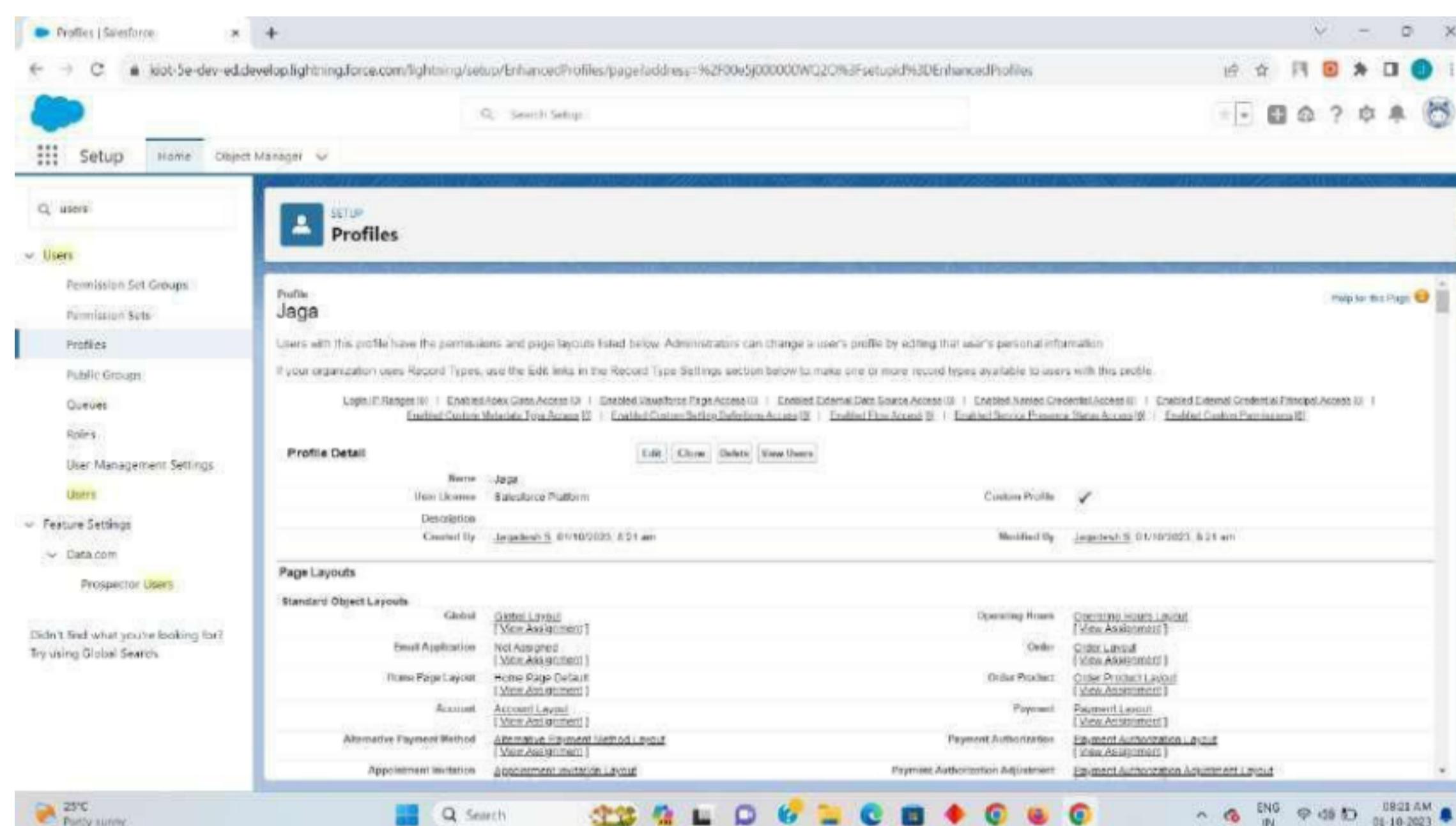
Click on the new to create a new profile along with the label and Api



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

http://kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ20%2Fe%2FreURL930%252F00e5j00000WQ20%253Fsetupid...

Setup Home Object Manager

search setup

Users

Profiles

Communication Subscriptions Contracts Locations Party Contracts Push Topics Sellers Streaming Channels User External Credentials

Custom Object Permissions

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.
- Role login IP restrictions.
- Skip employee device activation during Experience Cloud site login.

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Search

8:21 AM 01-16-2023

Profiles

Communication Subscriptions Contracts Locations Party Contracts Push Topics Sellers Streaming Channels User External Credentials

Custom Object Permissions

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.
- Role login IP restrictions.
- Skip employee device activation during Experience Cloud site login.

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Search

8:21 AM 01-16-2023

Profiles | Salesforce

http://kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ20%2Fe%2FreURL930%252F00e5j00000WQ20%253Fsetupid...

Setup Home Object Manager

search setup

Users

Profiles

Communication Subscriptions Contracts Locations Party Contracts Push Topics Sellers Streaming Channels User External Credentials

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Session Timeout Out After: 2 hours of inactivity

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Search

8:21 AM 01-16-2023

Profiles

Communication Subscriptions Contracts Locations Party Contracts Push Topics Sellers Streaming Channels User External Credentials

Custom Object Permissions

Session Settings

Session Timeout Out After: 2 hours of inactivity

Session Security Level Required at Login: None

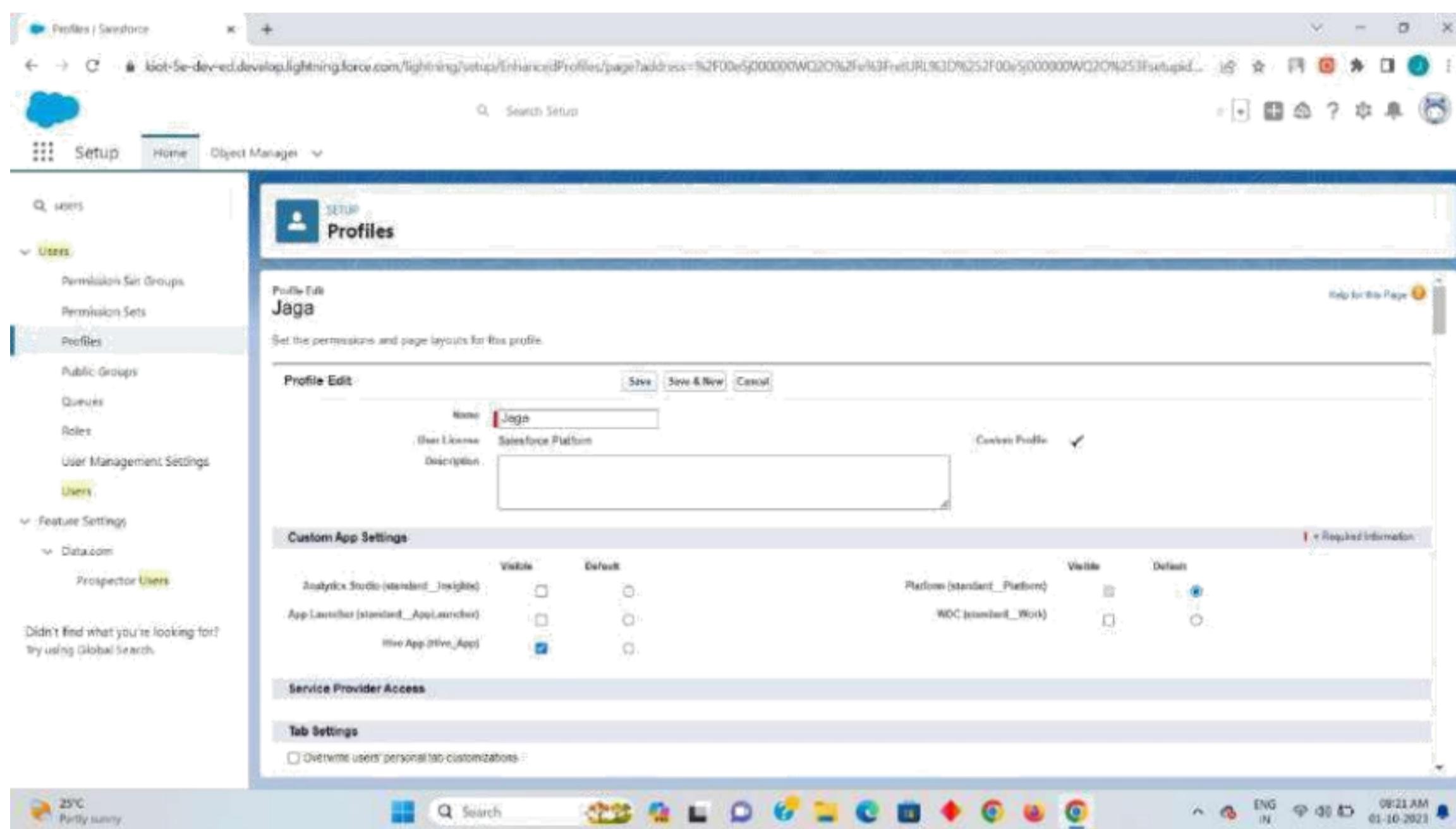
Enable different Experience Cloud login policies for employees:

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

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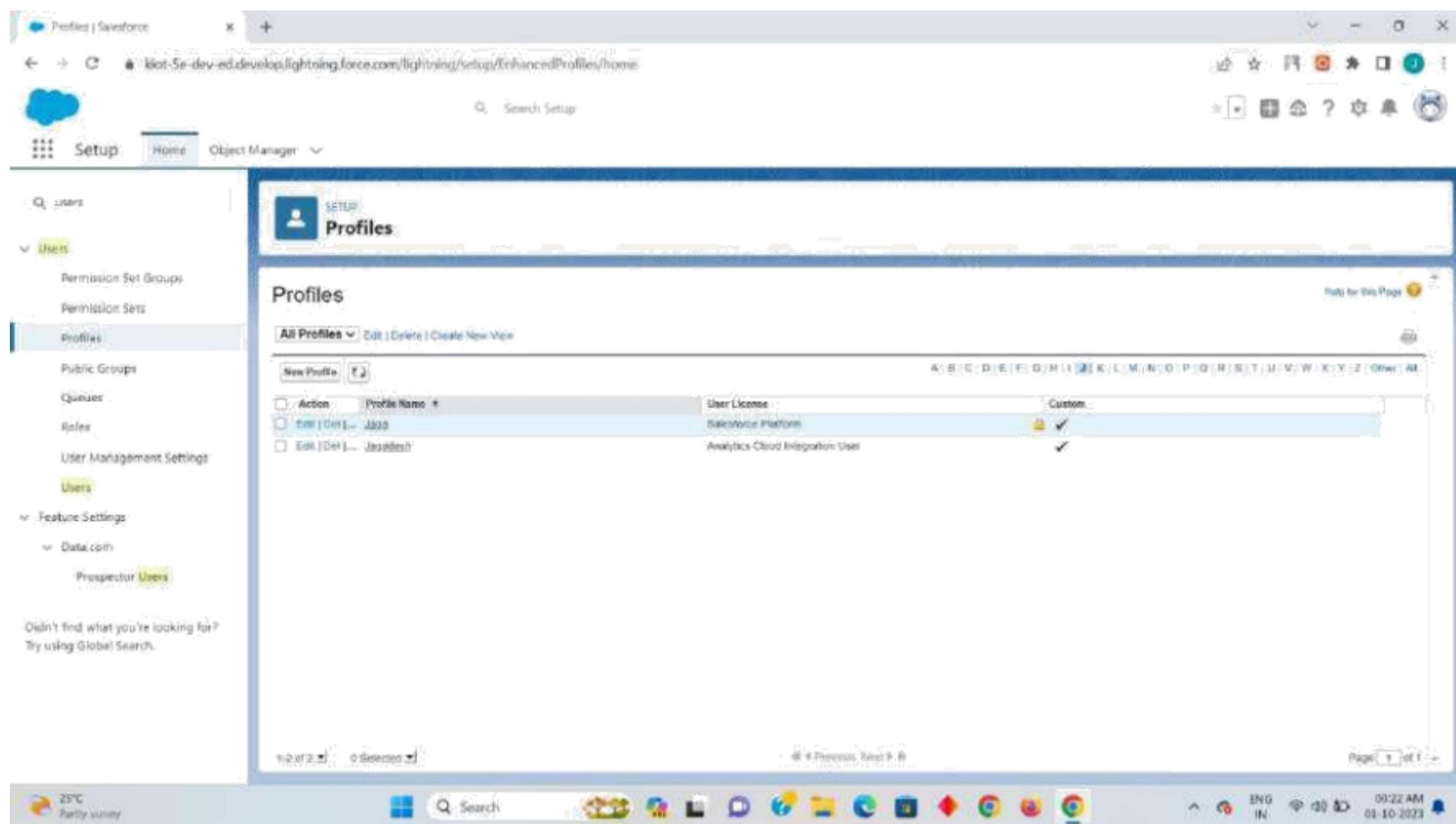
Search

8:21 AM 01-16-2023



Step 4

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

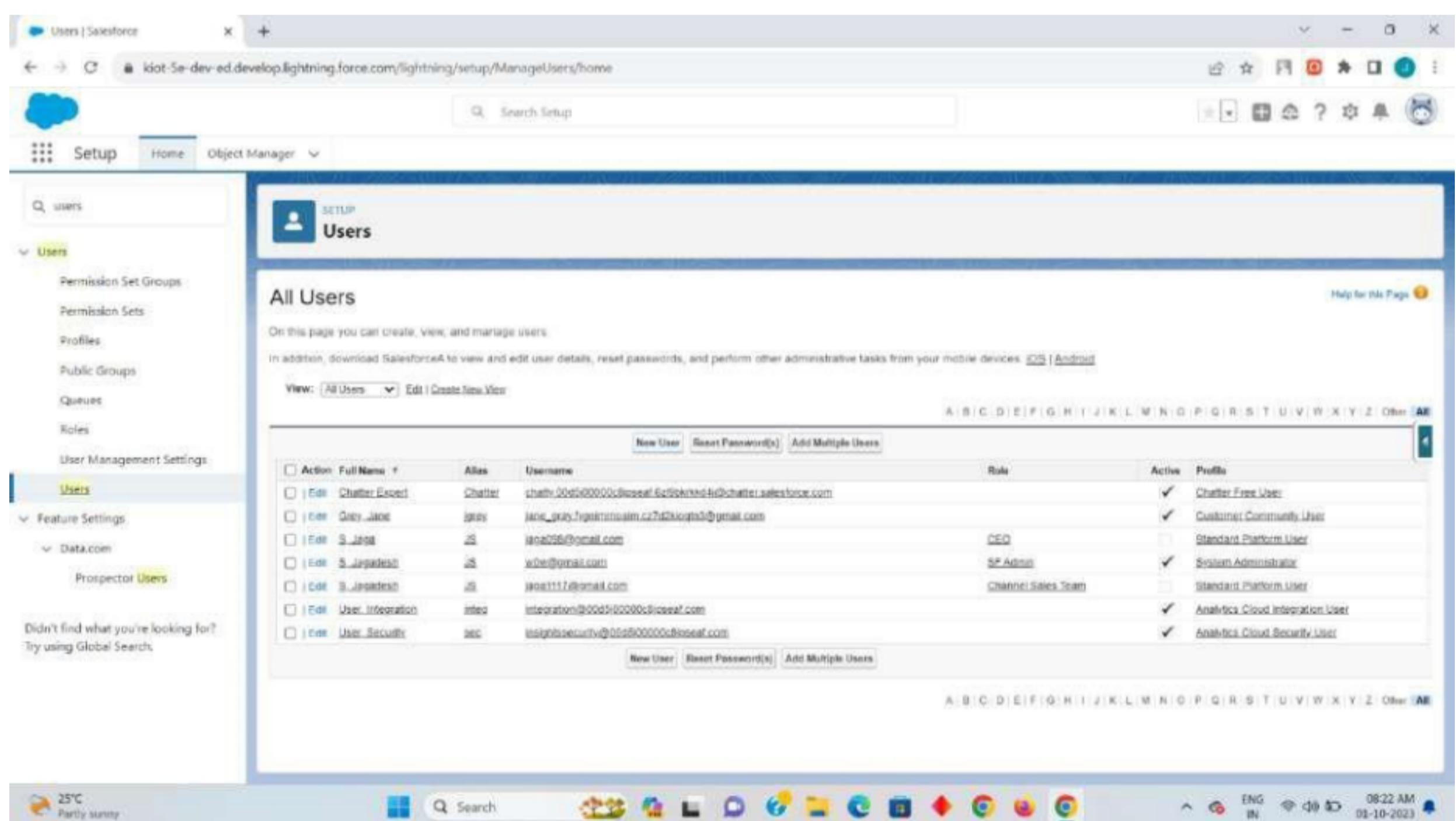


Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new

user after clicking that you need to create two user along

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



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar navigation includes 'Setup' (selected), 'Home', 'Object Manager', and sections for 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users' (selected). The main content area is titled 'All Users' and displays a table of existing users. The table columns are: Action, Full Name, Alias, Username, Role, Active, and Profile. The data in the table is as follows:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter_Edited	Chatter	chatty@00500000@roseal.com!chatter@salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Gary_Jaco	gary	jane_gary@geotrust.com.ca?@kogita@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/> Edit	S_Joshi	js	jana255@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S_Jagadeesh	js	wb@ymail.com	SP Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	S_Jagadeesh	js	joseph112@gmail.com	Channel Sales Team	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	inted	integration@0005100000@roseal.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00500000@roseal.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Setup - Users

New User

User Edit

General Information

First Name	Jayadev111
Last Name	S
Alias	J
Email	jay123@gmail.com
Username	jay123@gmail.com
Middle Name	User109012875148952992
Title	
Company	
Department	
Division	

Role: Director - Channel Sales

User License: Salesforce Platform

Profile: Admin - Normal

Action: Jaya - Standard Platform User

Marketing User: Standard Platform User

Office User: Standard Platform User

Knowledge User: Standard Platform User

Flow User: Standard Platform User

Service Cloud User: Standard Platform User

Master Contact User: Standard Platform User

Slack Publisher User: Standard Platform User

WDC User: Standard Platform User

Data.com User Type: Admin

Data.com Monthly Activity Limit: Default (1000)

Accessibility Mode (Classic Only): Standard

High-Contrast Patterns on Charts: Standard

Save Save & New Cancel Help for this Page

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

Salesforce Setup - Users

New User

User Edit

General Information

First Name	Jayadev122
Last Name	S
Alias	J
Email	jay1@gmail.com
Username	jay1@gmail.com
Middle Name	User109012879983016741
Title	
Company	
Department	
Division	

Role: Marketing Team

User License: Salesforce Platform

Profile: Admin - Normal

Action: Jaya - Standard Platform User

Marketing User: Standard Platform User

Office User: Standard Platform User

Knowledge User: Standard Platform User

Flow User: Standard Platform User

Service Cloud User: Standard Platform User

Master Contact User: Standard Platform User

Slack Publisher User: Standard Platform User

WDC User: Standard Platform User

Data.com User Type: Admin

Data.com Monthly Activity Limit: Default (1000)

Accessibility Mode (Classic Only): Standard

High-Contrast Patterns on Charts: Standard

Save Save & New Cancel Help for this Page

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

Salesforce Setup - Users

All Users

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

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

View: [All Users](#) [Edit User Details](#)

Actions	Full Name	Mobile	Email	Role	Action	Profile
<input type="checkbox"/>	Amrit - Full Name	9198	amrit@salesforce.com	Sales	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Exit - S. Jayadev	9198	exit@salesforce.com	SP Admin	<input checked="" type="checkbox"/>	Edition Administrator
<input type="checkbox"/>	Supriya10	9198	supriya@salesforce.com	Current Sales Team	<input checked="" type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	Exit - S. Jayadev	9198	exit123@gmail.com	Director - Channel Sales	<input checked="" type="checkbox"/>	Jaya
<input checked="" type="checkbox"/>	Exit - S. Jayadev	9198	exit@salesforce.com	Marketing Team	<input checked="" type="checkbox"/>	Jaya

New User Reset Password(s) Add Multiple Users

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

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

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

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

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

25°C Partly sunny

Search Setup

Help for this Page

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

Action	Permission Set Label	Description	Licenses
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories, includes all buyer capabilities, and allows access to manage carts and orders.	QB Buyer Permission Set One Seat
<input type="checkbox"/>	Salesforce	Denotes that the user is a Sales Client or Service Client user.	QB Salesforce Permission Set One Seat
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	CRM User
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Interaction Centers.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use Interaction Centers.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Interaction Centers.	Service Cloud Voice User
<input checked="" type="checkbox"/>	Commerce Order Management	Allows users create, read, update, and delete locations, publications, and URLs.	Commerce Order Management User
<input type="checkbox"/>	Field Service Manager	Give your mobile workforce access to the Field Service mobile app.	Field Service Manager
<input type="checkbox"/>	Merchandise	Allow access to commerce merchandising features.	Commerce Merchandise User
<input type="checkbox"/>	Order Management User	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Questions Response	Access to all features enabled by Order Management.	Lightning Order Management User

1-20 of 30 Page 1 of 2

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

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Search

Cloud File Cabinet Home

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

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Prospector Users

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

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Search Setup

Help for this Page

Permission Sets

Permission Set Create

Enter permission set information

Label: * = Required Information

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

None - If you plan to assign this permission set to multiple users with different user and permission set licenses.

A specific user license if you want users with only one license type to use this permission set.

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

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

25°C Partly sunny

Search

Cloud File Cabinet Home

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSS%00000Pgta%3FdclFrameOrigin%3Dhttps%253A%252F%252Fkot-5e-dev-ed.devel...

Setup Home Object Manager

Q. users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

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User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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Search Setup

Video Tutorial | Help for this Page

Permission Set Overview

Description: permission12

API Name: permission12

License: Session Activation Required

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

Namespace Prefix: Created By: Japadash S. 01/10/2023, 8:24 am

Apps

Assigned Apps: Settings that specify which apps are visible in the app menu.

Assigned Connected Apps: Settings that specify which connected apps are visible in the app menu.

Object Settings: Permissions to access objects and fields, and settings such as tab 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

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSS%00000Pgta%3FdclFrameOrigin%3Dhttps%253A%252F%252Fkot-5e-dev-ed.devel...

Setup Home Object Manager

Q. users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

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Search Setup

Video Tutorial | Help for this Page

Permission Set Overview Object Settings

Object Settings

Object Name: Account

Object Name: Account.Balance

Object Name: Account.Reason

Object Name: Account.Import

Object Name: Alternative Payment Methods

Object Name: Event.Store

Object Name: App Analytics Query Requests

Object Name: Application Usage Agreements

Object Name: Account Categories

Object Name: Account.Invitations

Object Name: Account.Indexes

Object Name: Account.Schedule Agreements

Object Name: Account.Schedule.List

Object Name: Account.Task.Time Slots

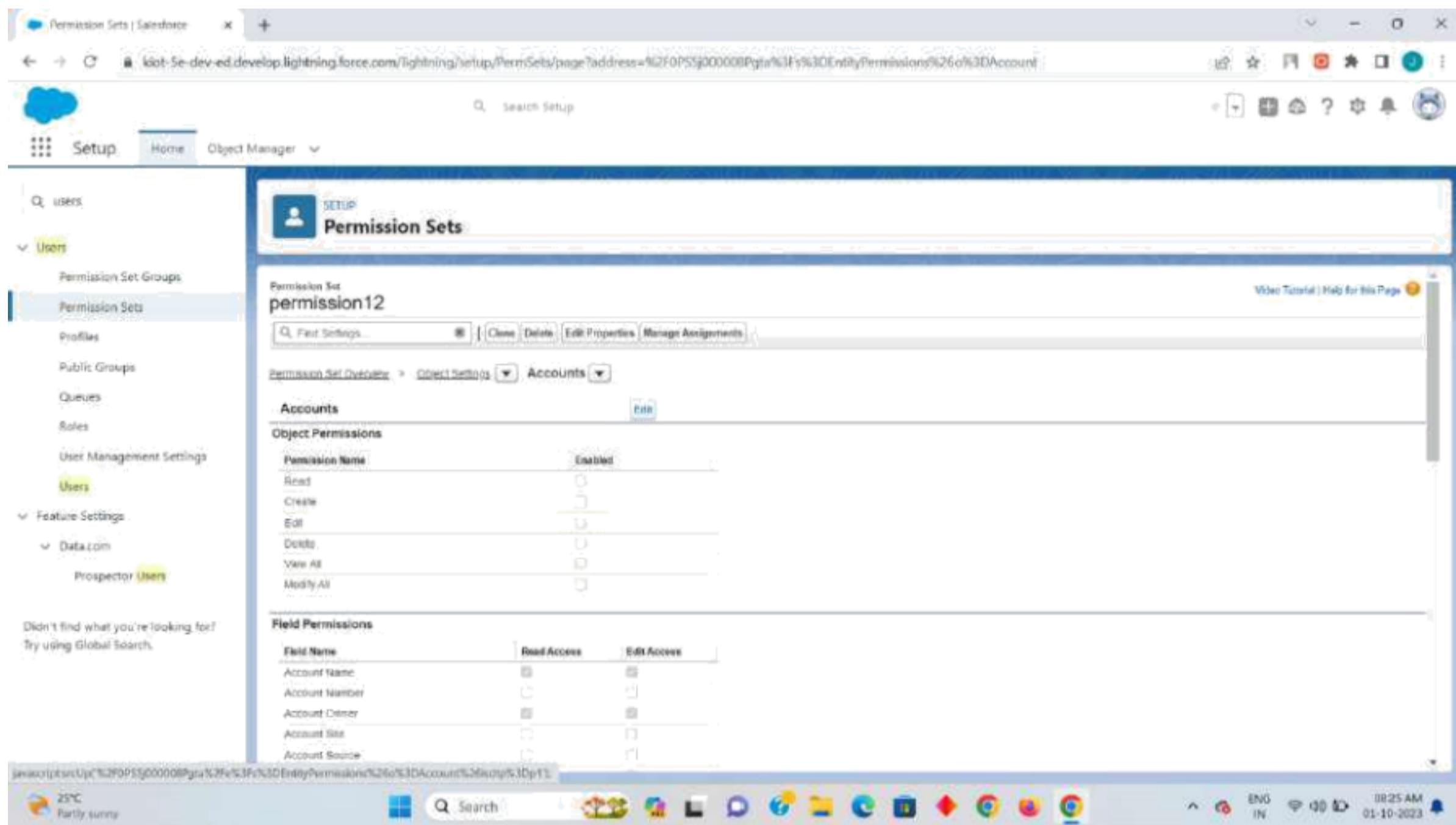
Object Name: Asset Actions

Object Name: Asset Actions Services

Object Permissions Total Fields Tab Settings

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

ENG IN 08:25 AM 01-10-2023



Step 7:

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

The screenshots show the 'Permission Sets' page for 'permission12' in the Salesforce Setup. The left sidebar shows 'Users' selected. The main area displays the 'Object Permissions' for the 'Accounts' object. In the first screenshot, the 'Edit' permission is checked under 'Enabled'. In the second screenshot, the 'Edit' permission is unchecked. Both screenshots also show the 'Field Permissions' section below.

Object Permissions

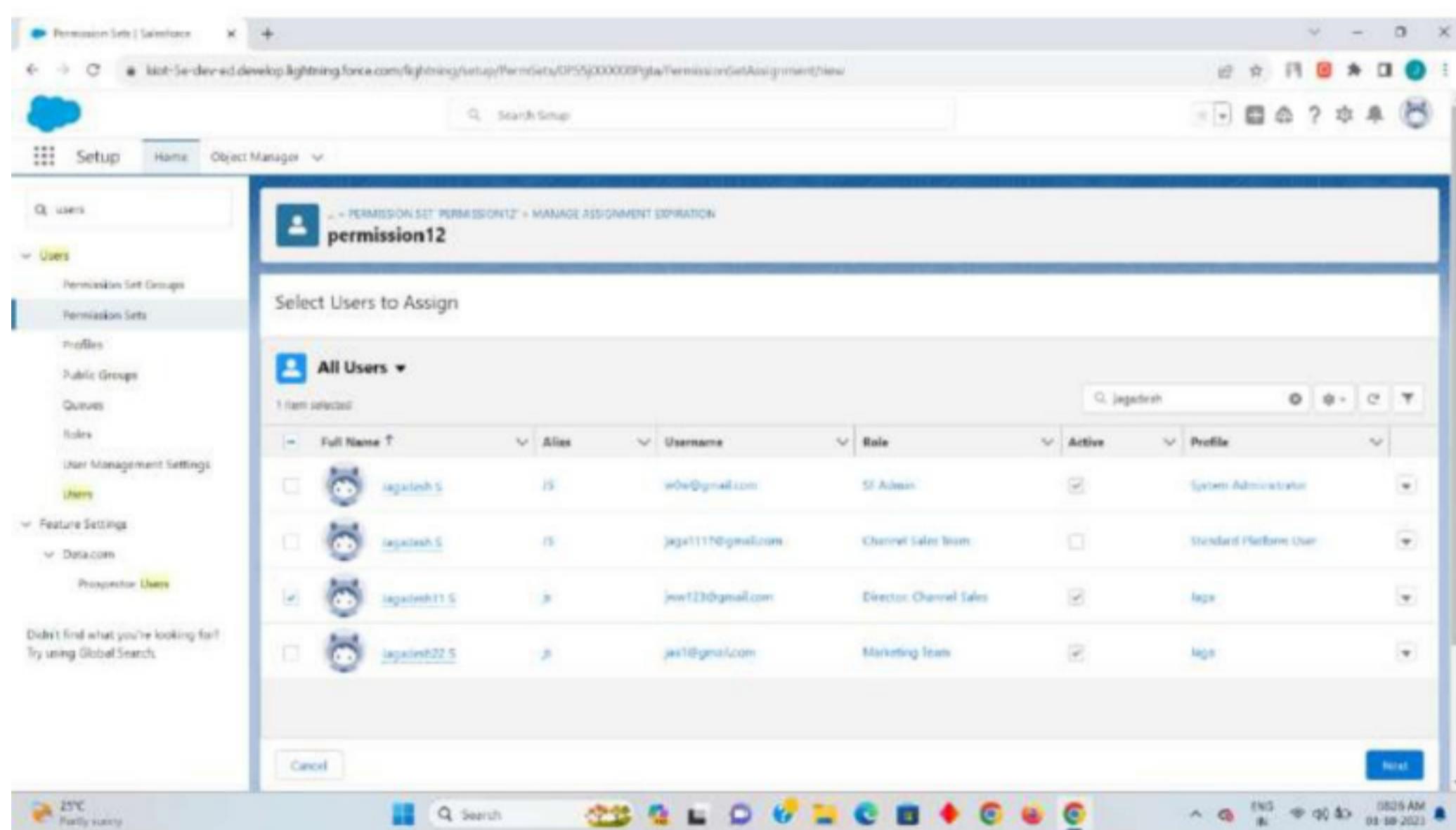
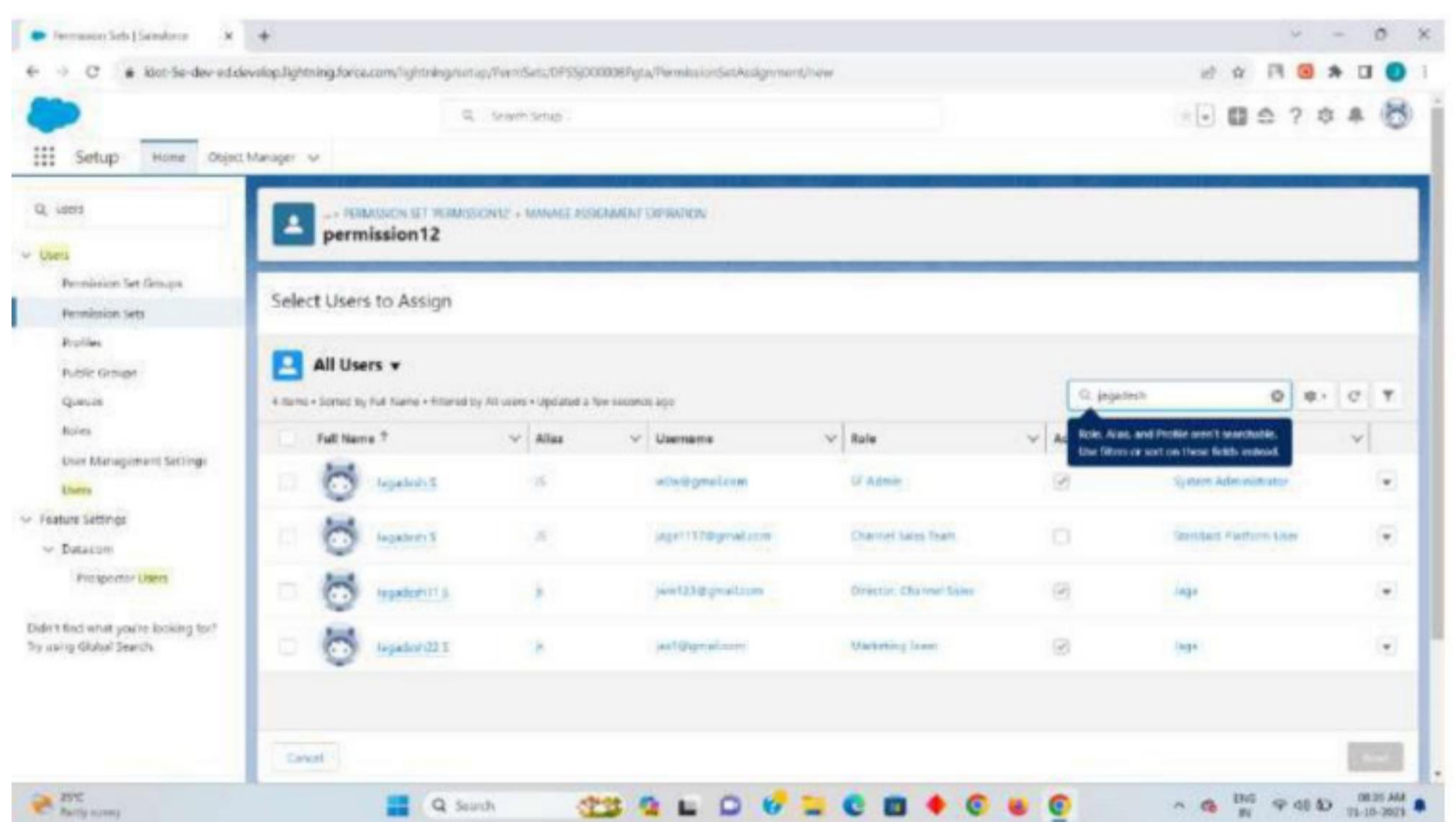
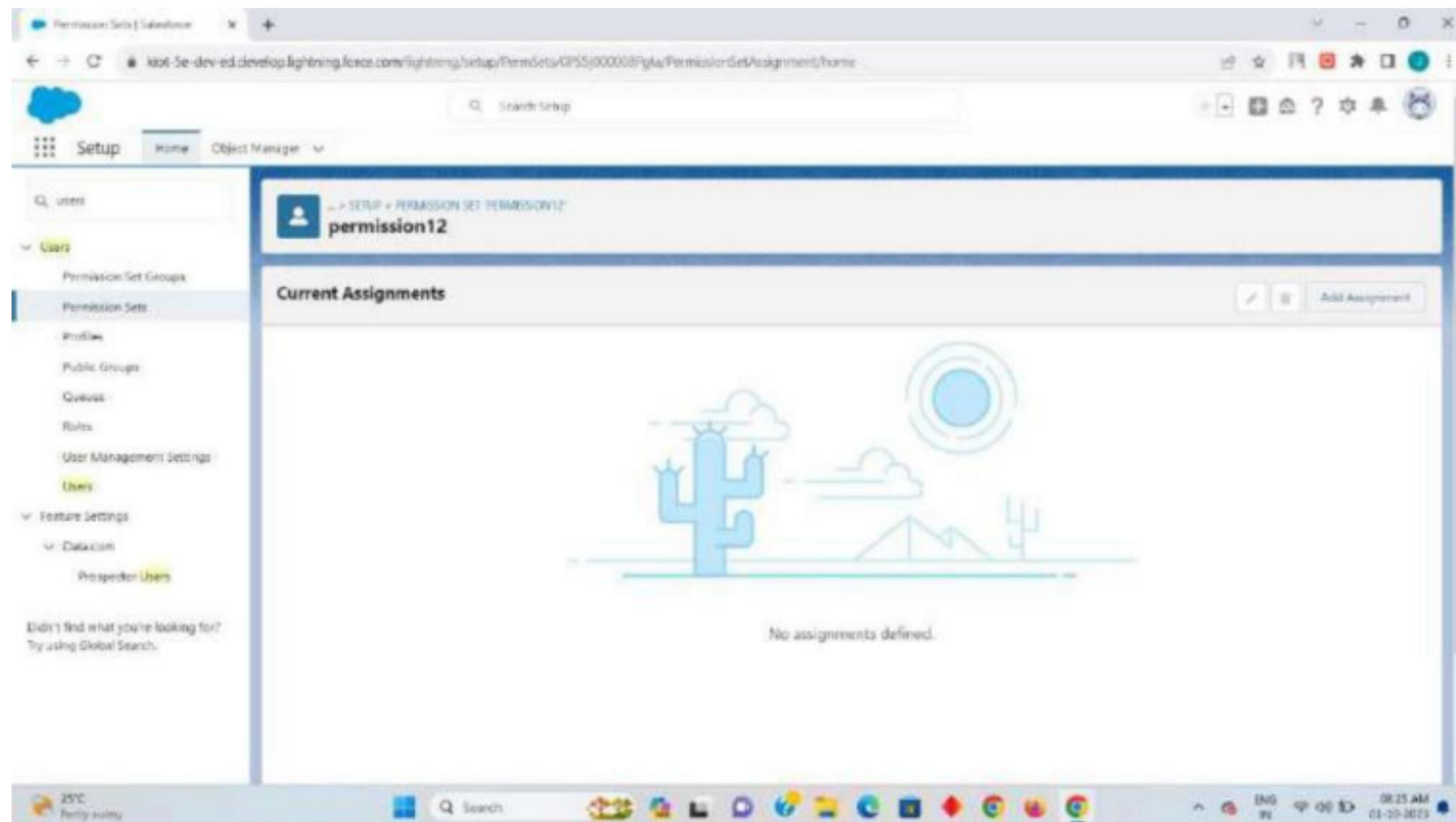
Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

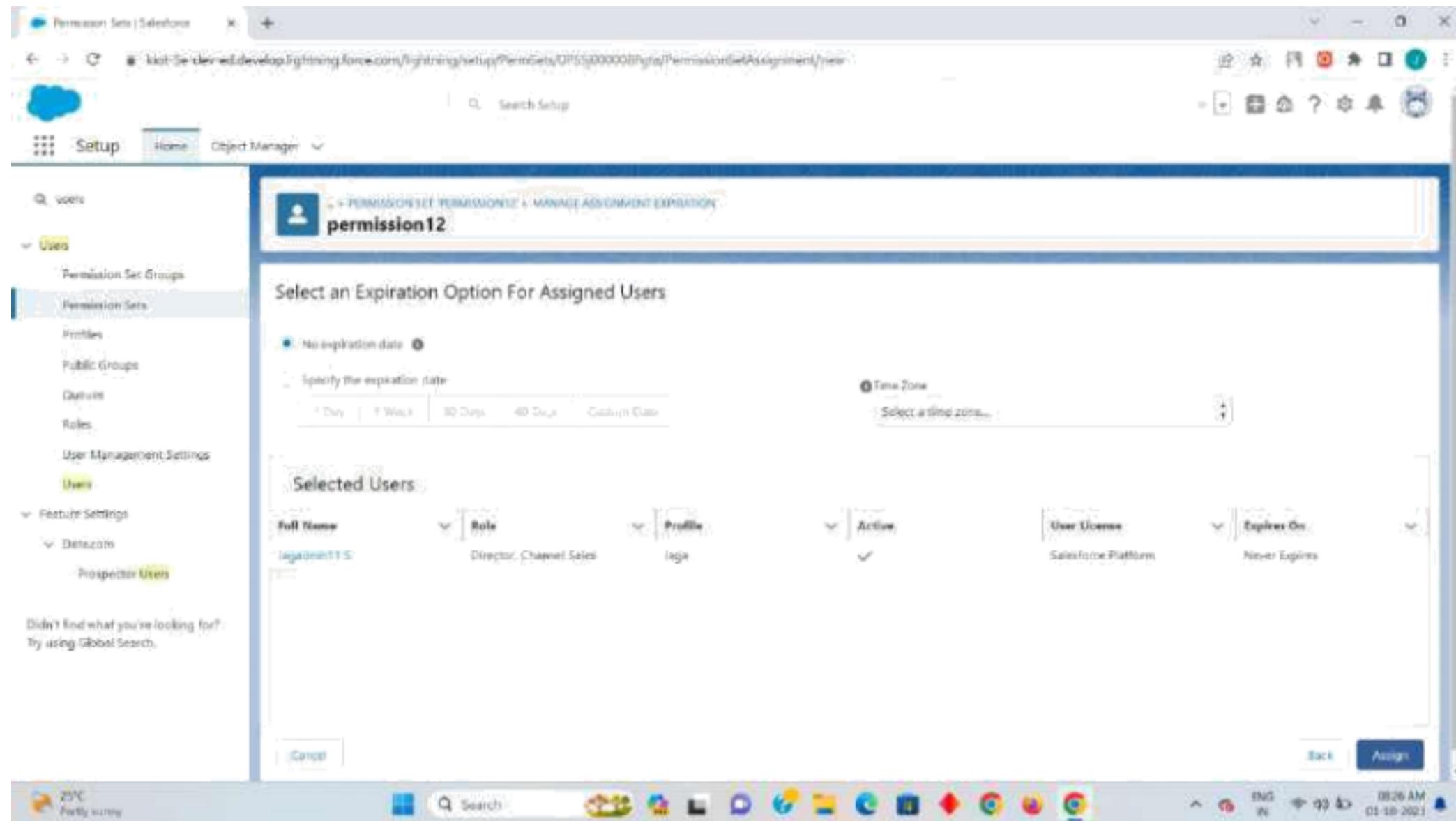
Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input type="checkbox"/>	<input type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source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

Step 8

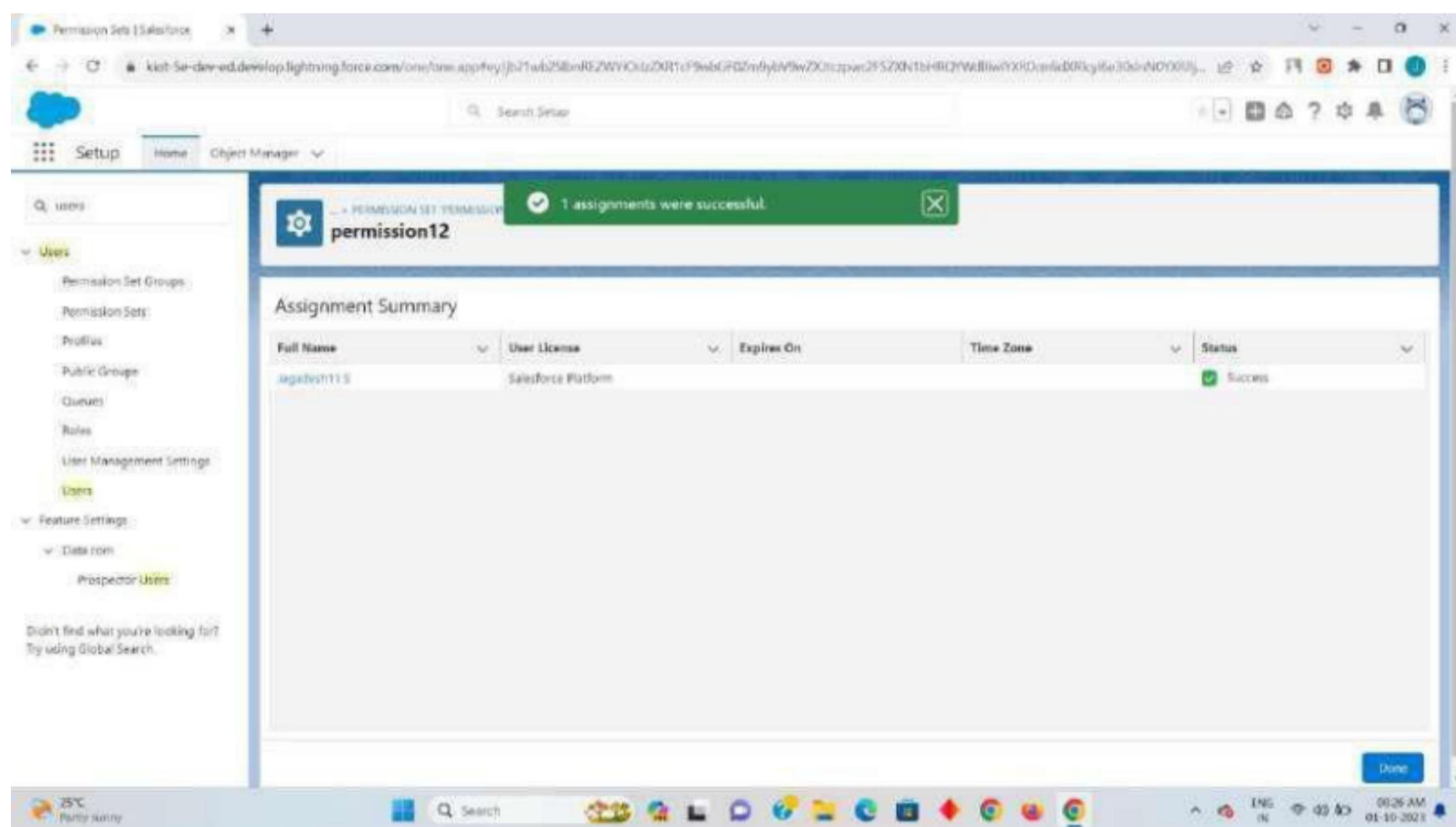
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



Now the specific access for the Jagadeth11 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**.

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)	<input checked="" type="checkbox"/>	
Record Types		Rating	Rating__c	Picklist		
Related Lookup Filters		Survey Result Name	Name	Auto Number	<input checked="" type="checkbox"/>	
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. In the 'Information' section, the 'Email Template Name' is 'Thank You Email - Survey'. The 'Related Entity Type' is 'Survey Result'. The 'Subject' is 'Thank You For Completing Our Survey!'. The 'HTML Value' contains a personalized message: '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.' Below this, it says 'Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.' and 'Thanks, Automation Champion'. The 'Created By' field shows 'Rakesh Gupta, 12/21/2020, 4:23 PM' and the 'Last Modified By' field shows 'Rakesh Gupta, 12/21/2020, 4:32 PM'.

Step 3: Create an Email Alert

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

Tab button. The **Unique Name** will
populate.

5. For Object select Survey Result.

- 6. For the Email Template chooses Lightning Email Template Thank You Email – Survey.**

7. For Recipient Type select Email Field: Email.

- 8. Click Save.**

Edit Email Alert
Survey - Thank You Email

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

Email Alert Edit [Save](#) [Save & New](#) [Cancel](#)

Edit Email Alert ■ = Required Information

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

[Help for this Page](#)

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	

How Many Records to Create

- One
- Multiple

How to Set the Record Fields

- Use all values from a record
- Use separate resources, and literal values

Create a Record of This Object

* Object	Survey Result
----------	---------------

Set Field Values for the Survey Result

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

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

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

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

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

Thank You Email.

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

5. Click Done.

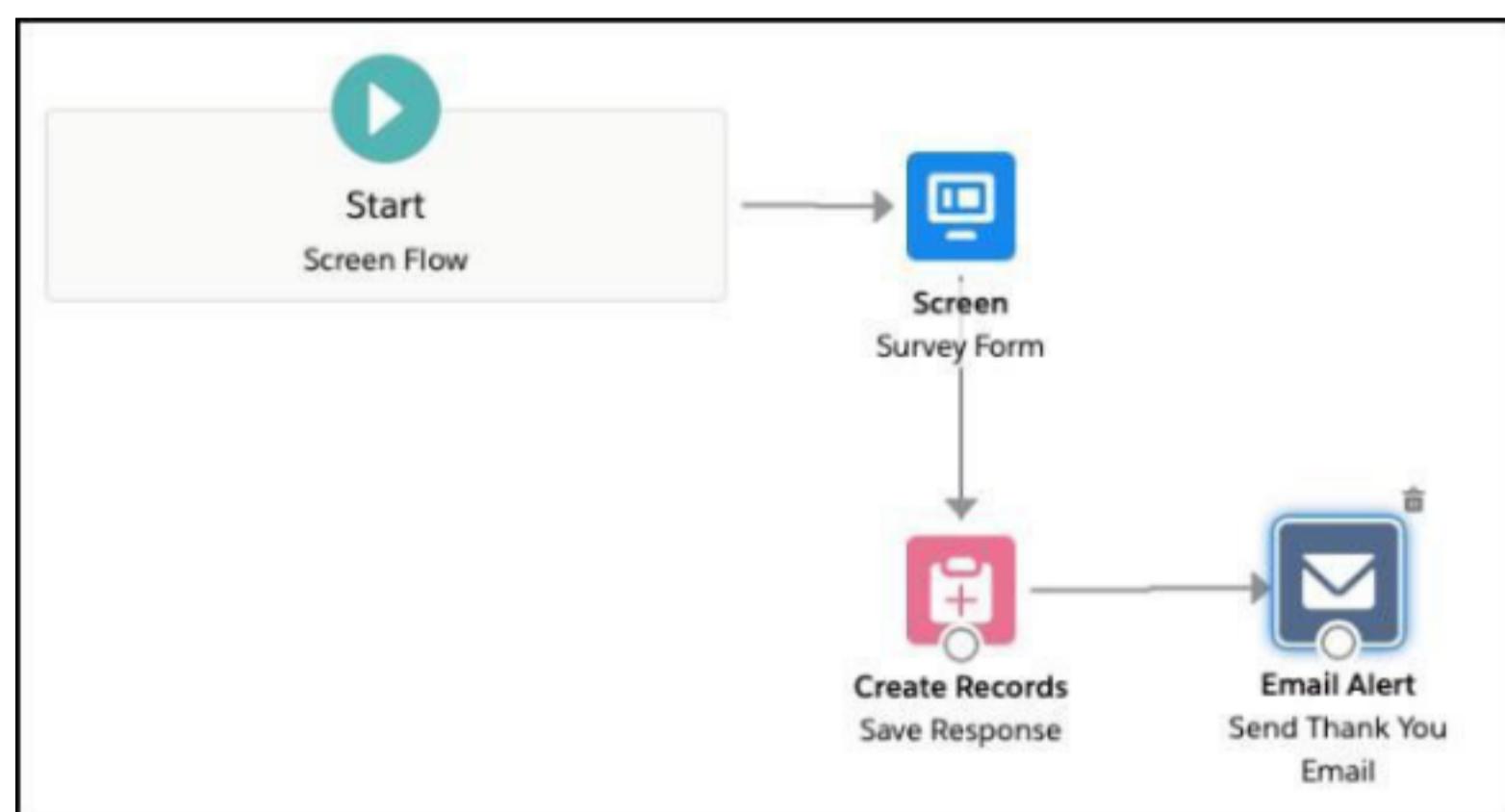
Edit "Survey - Thank You Email" email alert

Use values from earlier in the flow to set the inputs for the "Survey - Thank You Email" email alert. To use its outputs later in the flow, store them in variables.

* Label	* API Name
Send Thank You Email	Send_Thank_You_Email
Description	
<input type="text"/>	
Set Input Values	
A3 * Record ID	(!Save_Response)

Cancel 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: Survey

* Flow API Name: Survey

Description:

Hide Advanced

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

* Type: Screen Flow

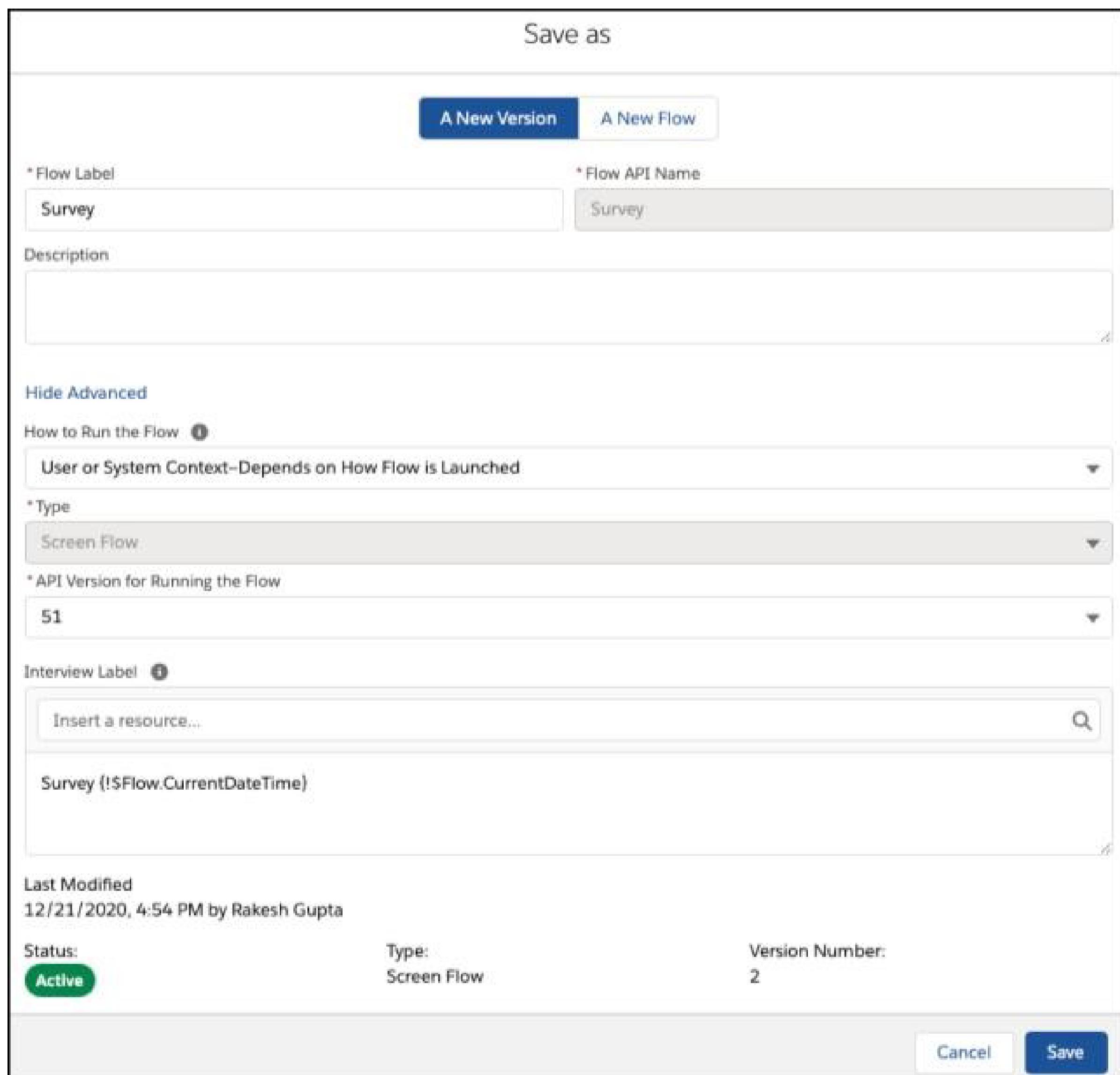
* API Version for Running the Flow: 51

Interview Label: Survey {!\$Flow.CurrentDateTime}

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

Status: **Active** Type: Screen Flow Version Number: 2

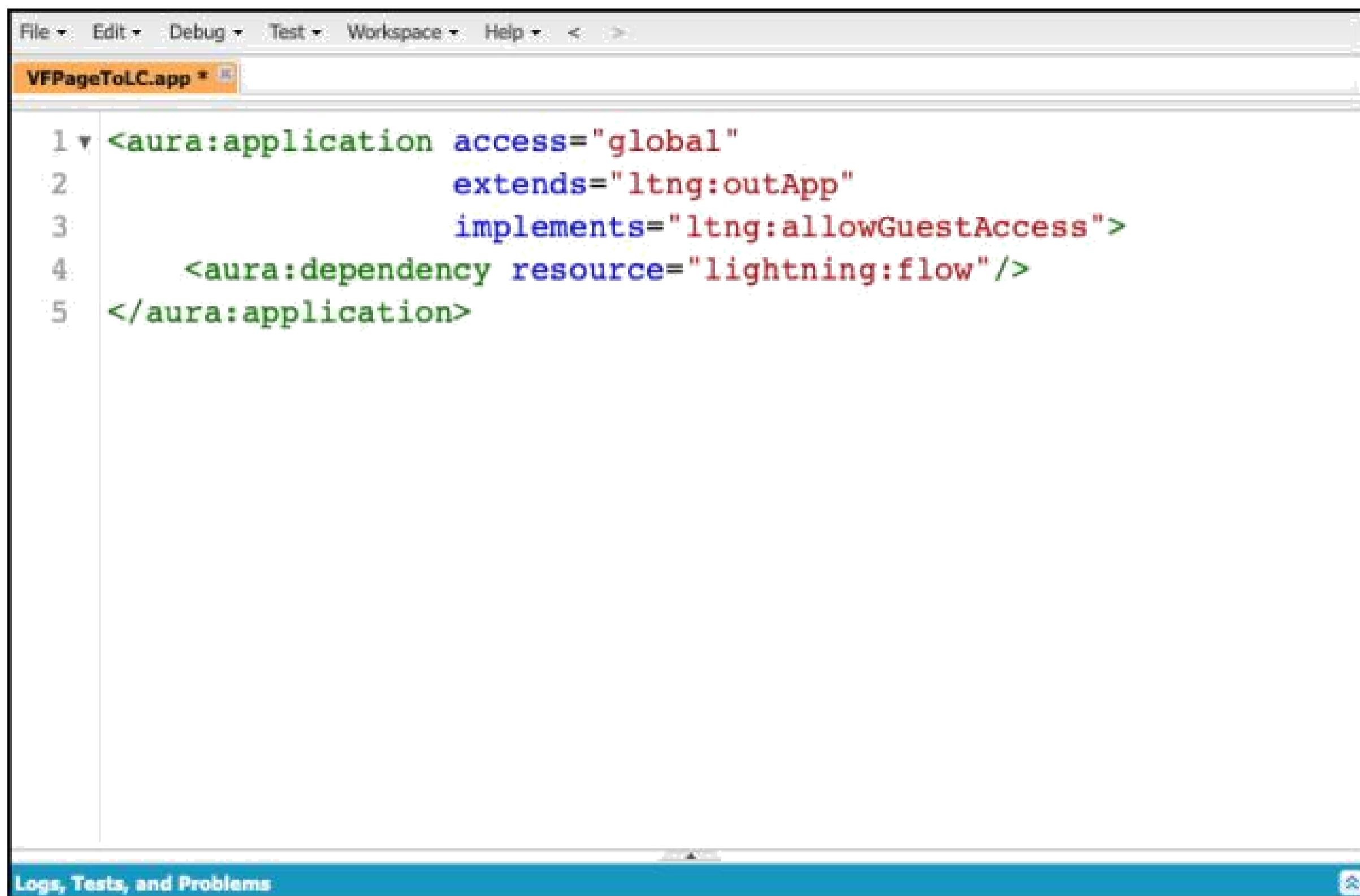
Cancel **Save**



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

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

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



The screenshot shows a code editor window with the title bar "File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >". The active tab is "VFPageToLC.app *". The code in the editor is:

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

The status bar at the bottom shows "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

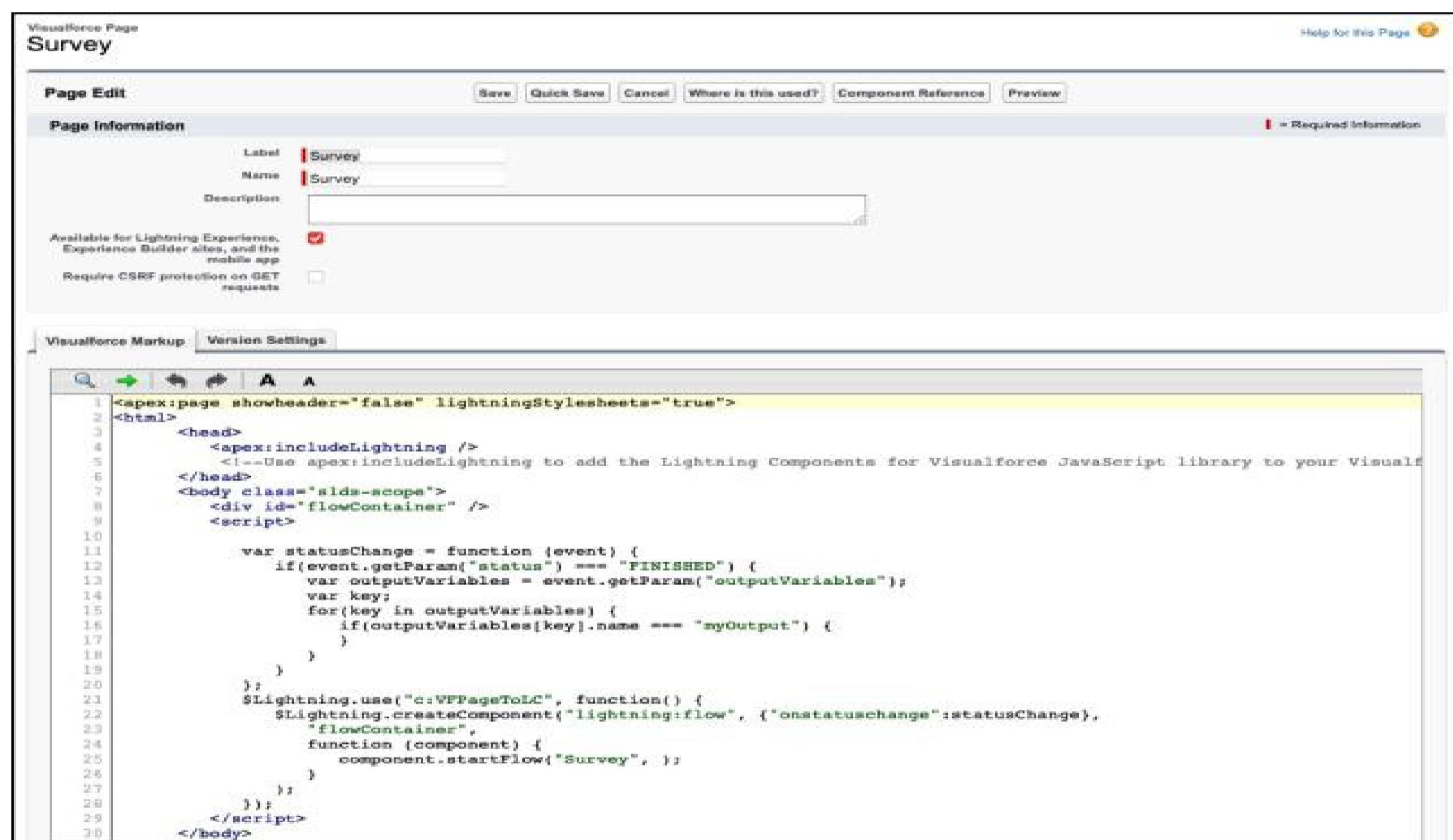
app.

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 Salesforce Visualforce Page Editor. At the top, it says "Visualforce Page Survey". Below that is the "Page Edit" toolbar with buttons for Save, Quick Save, Cancel, Where is this used?, Component Reference, and Preview. Under "Page Information", the Label is set to "Survey" and the Name is also "Survey". There is a "Description" field and two checkboxes: one checked for "Available for Lightning Experience, Experience Builder sites, and the mobile app" and one unchecked for "Require CSRF protection on GET requests". Below this is the "Visualforce Markup" tab, which contains 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:VPPageToLC", 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	<input type="text"/>		
Site Contact	Rakesh Gupta		
Default Record Owner	Rakesh Gupta		
Default Web Address	http://kalihar-developer-edition.gus.force.com/_survey		
Active	<input checked="" type="checkbox"/>		
Active Site Home Page	Survey		
Inactive Site Home Page	InMaintenance		
Site Template	SiteTemplate		
Site Robots.txt	<input type="text"/>		
Site Favorite Icon			
Analytics Tracking Code	<input type="text"/>		
URL Rewriter Class	<input type="text"/>		
Enable Feeds	<input type="checkbox"/>		
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!   

 **Survey Site Guest User** via bj9amq6fe7r-b-cdzwmaa.gd0.bnc.salesforce.com
to me 

8:09 PM (1 minute ago)    

Hi Alok Sinfal,

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

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

Thanks,
Automation Champion