

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.



SETUP

Object Manager

New Custom Object

Help for this Page ?

1 Permissions for this object are

Save **Save & New** **Cancel**

Custom Object Information

I = Required Information

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

Label | Bank Example: Account

Plural Label | Bank | Example: Account

Starts with vowel sound

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

Object Name | Bank Example: Account

Description

Object Manager | Salesforce

av10-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01I%2Fe%3FappLayout%3Dsetup%26retURL%3D%2...

Search Setup

Setup Home Object Manager

SETUP Object Manager

New Custom Object

Help for this Page ?

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

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound

* = Required Information

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

Object Name Example: Account

Description

Context-Sensitive Help Setting Open the standard Salesforce.com Help & Training window

Search

Windows Taskbar

10:27 AM

Bank | Salesforce

av10-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5h000001ndFd/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Bank

Details

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bank Name	Name	Text(80)		✓
Contact	Contact_c	Phone		▼
Created By	CreatedById	Lookup(User)		▼
Last Modified By	LastModifiedById	Lookup(User)		▼
Owner	OwnerId	Lookup(User,Group)		✓

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

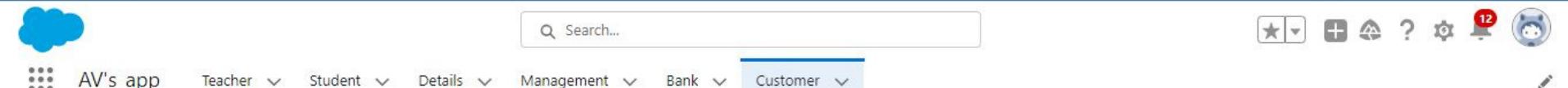
Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Windows Taskbar: Search, File Explorer, Mail, Edge, Notepad, Settings, Task View, Google Chrome, VLC Media Player, Internet Explorer, Microsoft Edge, Task Manager, System, Control Panel, Help and Support, ENG, 10:29 AM, Chat



Customer
Recently Viewed ▾

0 items • Updated a few seconds ago

Customer Name

Full-screen Snip

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



Setup

Home

Object Manager 

SETUP > OBJECT MANAGER

Customer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Customer
New RelationshipHelp for this Page 

Step 6. Add custom related lists

Step 6 of 6

Field Label Bank

Data Type Master-Detail

Field Name Bank

Description

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

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

Add Related List Page Layout Name



Bank Layout

 Append related list to users' existing personal customizations   

Search



ENG 10:41 AM

Recently Viewed | Customer | Sales | Profiles | Salesforce

avs10-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5h000003WEId%2Fe%3FretURL%3D%252F00e5h00...

Setup Home Object Manager Search Setup

profile **SETUP** **Profiles**

Users **Profiles**

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

Profile Edit **Bank management** Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit

Name	Bank management	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			

Custom App Settings

	Visible	Default	Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
AV's_app (AVs_app)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="radio"/>
College Count (Aravindan_V)	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>
WDC (standard__Work)	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Windows Taskbar: Search, File Explorer, Mail, Edge, Settings, Task View, Vlc, Google Chrome, Avast, AVG, 10:48 AM

Recently Viewed | Customer | Sales | Profiles | Salesforce

avs10-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5h000003WEId%2Fe%3FretURL%3D%252F00e5h00...

Setup Home Object Manager Search Setup

profile

Users Profiles

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

SETUP Profiles

Contact Point Consents Streaming Channels
Contact Point Emails User External Credentials

Custom Object Permissions

	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		
Bank	<input checked="" type="checkbox"/>							
Colleges	<input type="checkbox"/>							
Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Departments	<input type="checkbox"/>							
Details	<input type="checkbox"/>							
Management	<input type="checkbox"/>							
Student	<input type="checkbox"/>							
Teacher	<input type="checkbox"/>							

Session Settings

Session Times Out After Session Security Level Required at Login

Password Policies

User passwords expire in

Search ENG 10:49 AM

Recently Viewed | Customer | Sa | Users | Salesforce

avs10-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055h000009uC8F%3Fnoredirect%3D1%26isUserEntityOve...

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

Search Setup

Quick Find

SETUP

Users

User Manager Bank

User Profile Help for this Page

Manager Bank

Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0+] | User Provisioning Accounts [0]

User Detail

Name	Manager Bank	Role	<u>Marketing Team</u>
Alias	mbank	User License	Salesforce Platform
Email	managerbank.aaa@gmail.com	Profile	<u>Bank management</u>
Username	managerbank.aaa@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16970018096453619736	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	
Delegated Approver		Data.com User Type	

Search ENG 10:56 AM

SBI | Bank | Salesforce Users | Salesforce

av10-dev-ed.develop.lightning.force.com/lightning/r/Bank__c/a0A5h00000ljlzbEAF/view

Search... Bank

AV's_app Teacher Student Details Management Bank Customer

New Contact Edit New Opportunity

Cloud icon, Search bar, Header menu, Sidebar, Main content area.

Related **Details**

Bank Name: SBI

Contact: 1234567890

Created By: Aravindan V, 11/10/2023, 11:00 am

Owner: Aravindan V

Last Modified By: Aravindan V, 11/10/2023, 11:00 am

Related Details

Customer Name

aüth

Bank

SBI

Created By

 Aravindan V, 11/10/2023, 11:01 am

Last Modified B

Aravindan V, 11/10/2023, 11:01 am

SETUP
Prof

Profiles

Contact Point Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

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** ▾

Q Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

2020-03-03

Permission Set Groups

Permission Sets

Profiles

Public Groups



SETUP

Users

User

Manager Sales

User Profile Help for this Page 

Permission Set Assignments [0]	Permission Set Assignments: Activation Required [0]	Permission Set Group Assignments [0]	Permission Set License Assignments [0]	Personal Groups [0]
Public Group Membership [0]	Queue Membership [0]	Team [0]	Managers in the Role Hierarchy [0]	OAuth Apps [0]

User Detail

[Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#)

Name	Manager Sales	Role	Marketing Team
Alias	msale	User License	Salesforce
Email	managersales_bbb@gmail.com [Verify] 	Profile	Solution Manager
Username	managersales.bbb@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16970026099566373887 	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View 
		Data.com User Type	

ajith | Customer | Salesforce Permission Sets | Salesforce

av10-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Search Setup

permis

Users

- Permission Set Groups
- Permission Sets

Custom Code

- Custom Permissions

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

SETUP

Permission Sets

Help for this Page

Permission Sets

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

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

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

New

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone <u>Buyer</u>	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone <u>Buyer Manager</u>	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone <u>CRM User</u>	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/>	Clone <u>Commerce Admin</u>	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/>	Clone <u>Contact Center Admin</u>	Manage Service Cloud Voice contact centers that use A...	Service Cloud Voice User
<input type="checkbox"/>	Clone <u>Contact Center Agent</u>	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/>	Clone <u>Contact Center Supervisor</u>	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/>	Del Clone <u>Experience Profile Manager</u>	Salesforce	
<input type="checkbox"/>	Clone <u>Facility Manager</u>	Lets users create, read, edit, and delete locations, subl...	Facility Manager

1-25 of 30 ▾ 0 Selected ▾

◀ ▶ Previous Next ▶ ▶

Page 1 of 2

Search

11:15 AM

ajith | Customer | Salesforce Permission Sets | Salesforce

av10-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5h000006kSkT%3Fs%3DEntityPermissions%26o%3DAccount

Search Setup

Setup Home Object Manager

permis

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP

Permission Sets

Manager123

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

Video Tutorial | Help for this Page

Permission Set Overview > Object Settings ▾ Accounts ▾

Accounts

Edit

Object Permissions

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

Field Permissions

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

Windows Taskbar: Search, File Explorer, Mail, Edge, Notepad, Settings, Task View, File History, VLC, Google Chrome, Internet Explorer, AVG, AVG Firewall, ENG 11:17 AM

ajith | Customer | Salesforce Permission Sets | Salesforce

av10-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5h000006kSkT%2Fe%3Fs%3DEntityPermissions%26o%3DAc...

Search Setup

Setup Home Object Manager

permis

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP

Permission Sets

Manager123

Find Settings... Clone Delete Edit Properties Manage Assignments

Video Tutorial | Help for this Page

Permission Set Overview > Object Settings Accounts

Accounts Save Cancel

Object Permissions

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

Field Permissions

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

Search ENG 11:18 AM

ajith | Customer | Salesforce Permission Sets | Salesforce

av10-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5h000006kSkT/PermissionSetAssignment/new

Setup Home Object Manager

Search Setup

permis

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

Full Name ↑	AI... ↓	Username	Role	A... ↓	Profile
Aravindan V	AV	aravind767@gmail.com	<input checked="" type="checkbox"/>	System Administrator	
Chatter Expert	Chatter	chatty.00d5h000008jnlyeaq.djmwv6nokdsx@chatter.sales...	<input checked="" type="checkbox"/>	Chatter Free User	
Integration User	integ	integration@00d5h000008jnlyeaq.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration Us...	
Manager 1	m1	aaa111@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	
Manager 2	m2	bbb111@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	
Manager Bank	mbank	managerbank.aaa@gmail.com	<input checked="" type="checkbox"/>	Bank management	
Manager Sales	msale	managersales.bbb@gmail.com	<input checked="" type="checkbox"/>	Solution Manager	
Security User	sec	insightssecurity@00d5h000008jnlyeaq.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	

Cancel Next

Search

12

ajith | Customer | Salesforce Permission Sets | Salesforce

av10-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJzZXR1cF9wbGF0Zm9ybV9wZXJtcpw2FSZXN1bHRQYWdliwiYXR0c...

Search Setup

Setup Home Object Manager

permis

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Assignment Summary

Manager123

1 assignments were successful.

Full Name	User License	Expires On	Time Zone	Status
Manager Sales	Salesforce			Success

Done

Search Global Search

Windows Taskbar

11:20 AM

ajith | Customer | Salesforce Permission Sets | Salesforce

av10-dev-ed.lightning.force.com/lightning/setup/PermSets/0PS5h000006kSkT/PermissionSetAssignment/home

Setup Home Object Manager

permis

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

Search Setup

Manager123

... > SETUP > PERMISSION SET 'MANAGER123'

Current Assignments

<input type="checkbox"/> Full Name ↑	Active ↑	Role	Profile	User License	Expires On
<input type="checkbox"/> Manager Sales	✓	Marketing Team	Solution Manager	Salesforce	

Add Assignment

12

Windows Taskbar: Search, File Explorer, Mail, Edge, Settings, File, VLC, Google Chrome, Adobe Reader, Task View, 11:20 AM, ENG



Search...



AV's_app

Teacher

Student

Details

Management

Bank

Customer



Customer

Recently Viewed ▾



New

Import

0 items • Updated a few seconds ago

Search this list...

 Customer Name

Full-screen Screenshot

You haven't viewed any Customer recently.

Try switching list views.



Search



ENG 11:21 AM