

Naan Mudhalvan  
**Salesforce Developer**(Course)  
Assignment

Name : Arun J

Naan Mudhalvan id :

BB31912D7B40CF9B71448FFEC848F21B  
Year & Dep : 4<sup>th</sup> year & IT

Batch : 2024

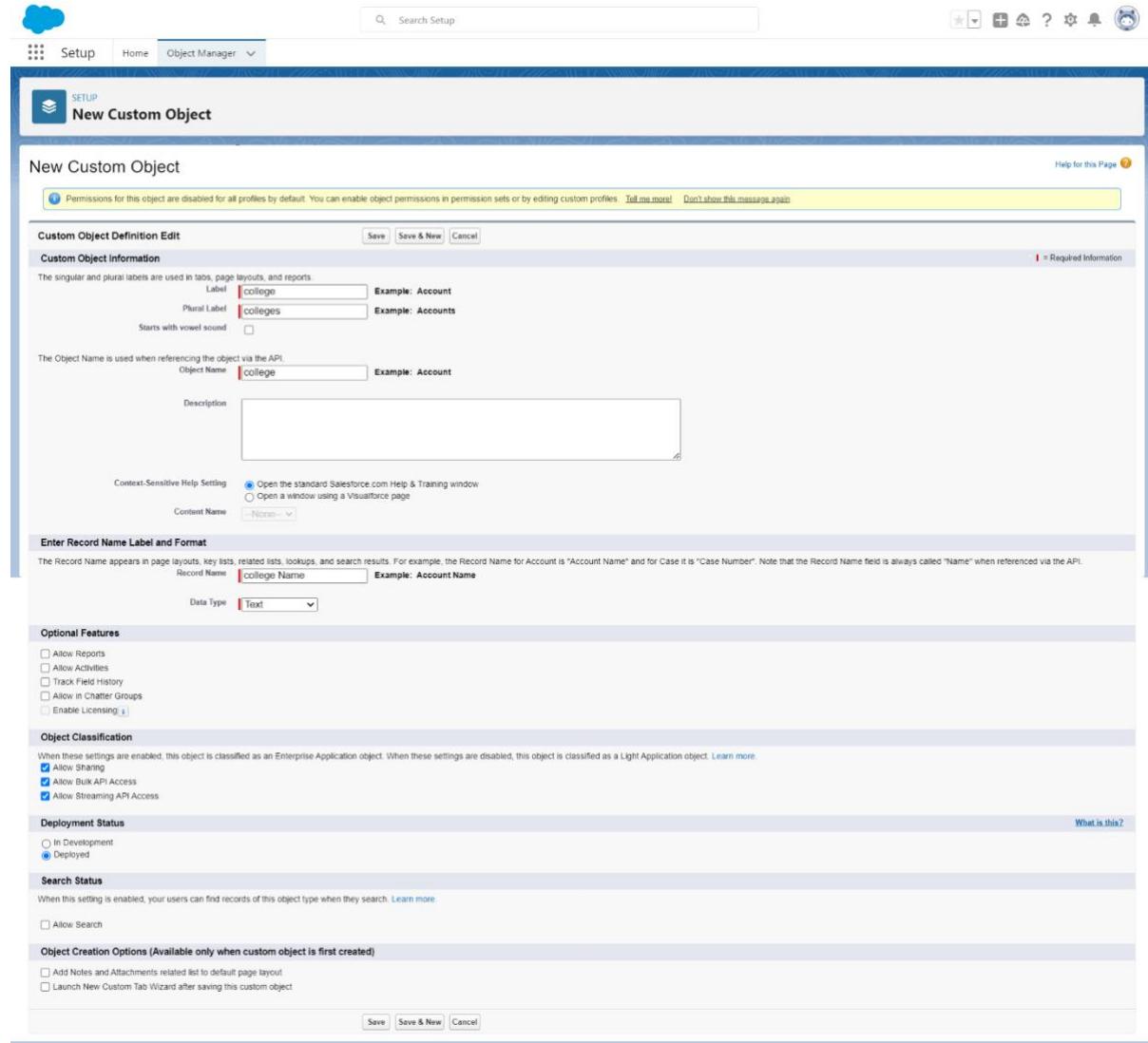
Zone no : Zone 8

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

### Solution:

#### Step 1: Create Custom Objects

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



The screenshot shows the 'New Custom Object' page in the Salesforce Setup interface. The page is titled 'New Custom Object' and contains several sections for defining the custom object:

- Custom Object Definition Edit**: Includes buttons for 'Save', 'Save & New', and 'Cancel'.
- Custom Object Information**:
  - Label: College (Example: Account)
  - Plural Label: colleges (Example: Accounts)
  - Starts with vowel sound:
- Description**: A text area for describing the object.
- Context-Sensitive Help Setting**:
  - Open the standard Salesforce.com Help & Training window
  - Open a window using a Visualforce page
- Content Name**:  None
- Enter Record Name Label and Format**:
  - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
  - Record Name: college Name (Example: Account Name)
  - Data Type:  Text
- Optional Features**:
  - Allow Reports
  - Allow Activities
  - Track Field History
  - Allow in Chatter Groups
  - Enable Licensing
- Object Classification**:
  - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).
  - Allow Sharing
  - Allow Bulk API Access
  - Allow Streaming API Access
- Deployment Status**:
  - 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

Second custom objects, let's call them "Department\_C"

Setup
Home
Object Manager

Object Manager
Help for this Page

### New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [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

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  Open a window using a Visualforce page

Content 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:  Example: Account Name

Data Type:

**Optional Features**

Allow Reports  Allow Activities  Track Field History  Allow in Chatter Groups  Enable Licensing

**Object Classification**

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

Allow Sharing  Allow Bulk API Access  Allow Streaming API Access

**Deployment Status**

In Development  Deployed

**Search Status**

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

Allow Search

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

Add Notes and Attachments related list to default page layout  Launch New Custom Tab Wizard after saving this custom object

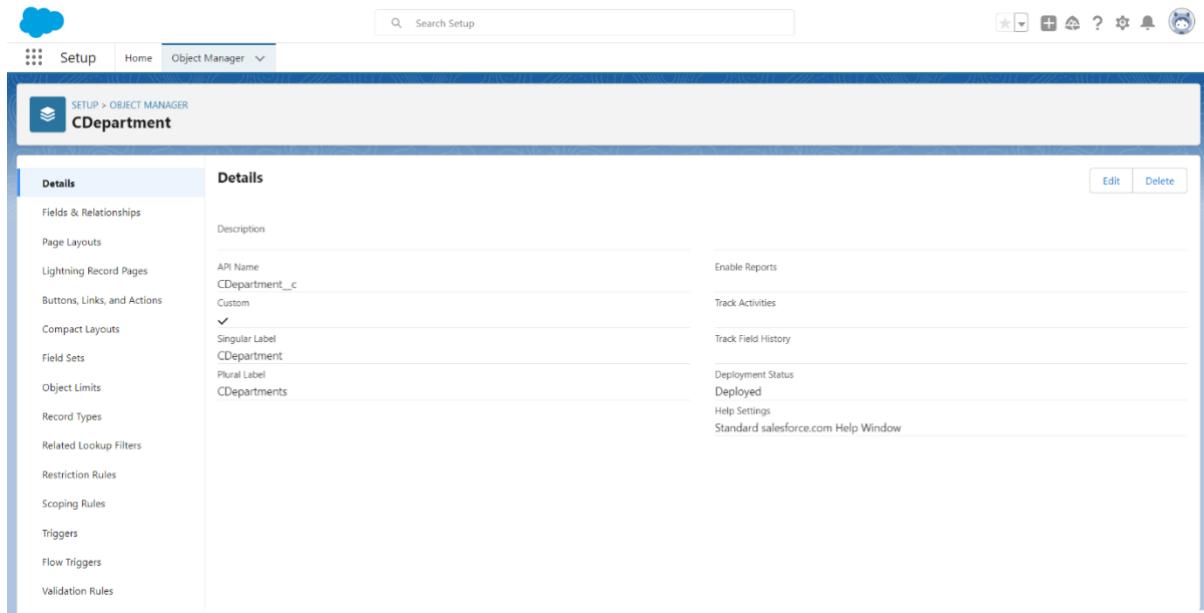
[Save](#)
[Save & New](#)
[Cancel](#)

## 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.



Object Manager

CDepartment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name

CDepartment\_\_c

Custom

✓

Singular Label

CDepartment

Plural Label

CDepartments

Enable Reports

Track Activities

Track Field History

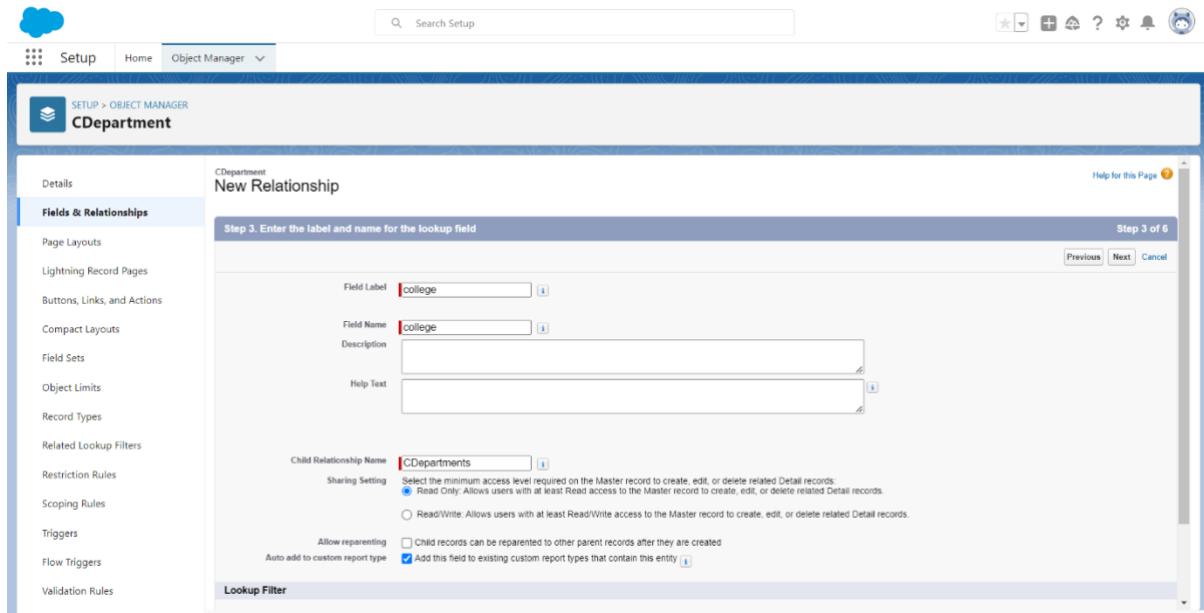
Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit Delete



Setup > OBJECT MANAGER

CDepartment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

New Relationship

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

Field Label: college

Field Name: college

Description:

Help Text:

Child Relationship Name: CDepartments

Sharing Setting: Read Only

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

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

Step 3 of 6

Help for this Page

Previous Next Cancel

Lookup Filter

### Step 3: Create the Roll-Up Summary Field

Now, let's create a **Roll-Up Summary Field** on the "College\_C" to calculate the total number of related records in "Department\_C":

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

## 10. Click "Next" and "Save" to create the Roll-Up Summary Field.

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

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

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

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.

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

**college New Custom Field**

**Step 4. Establish field-level security** Step 4 of 5

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

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

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

Help for this Page

Previous Next Cancel

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

**college New Custom Field**

**Step 3. Define the summary calculation** Step 3 of 5

**Select Object to Summarize**

Master Object: college  
 Summarized Object: CDepartments

**Select Roll-Up Type**

COUNT  
 SUM  
 MIN  
 MAX

Field to Aggregate: None

**Filter Criteria**

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

Help for this Page

Previous Next Cancel

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

**college New Custom Field**

**Step 2. Enter the details** Step 2 of 5

Field Label: Total count  
 Field Name: Total\_count  
 Description:  
 Help Text:

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

Help for this Page

Previous Next Cancel

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 1. Choose the field type**

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

**Data Type**

Roll Up Summary

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

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.

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

Lookup Relationship

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

Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

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

External Lookup Relationship

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

Boolean

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

**Step 1**

Next Cancel

Setup > Object Manager college

**Fields & Relationships**

4 items. Sorted by Field Label

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

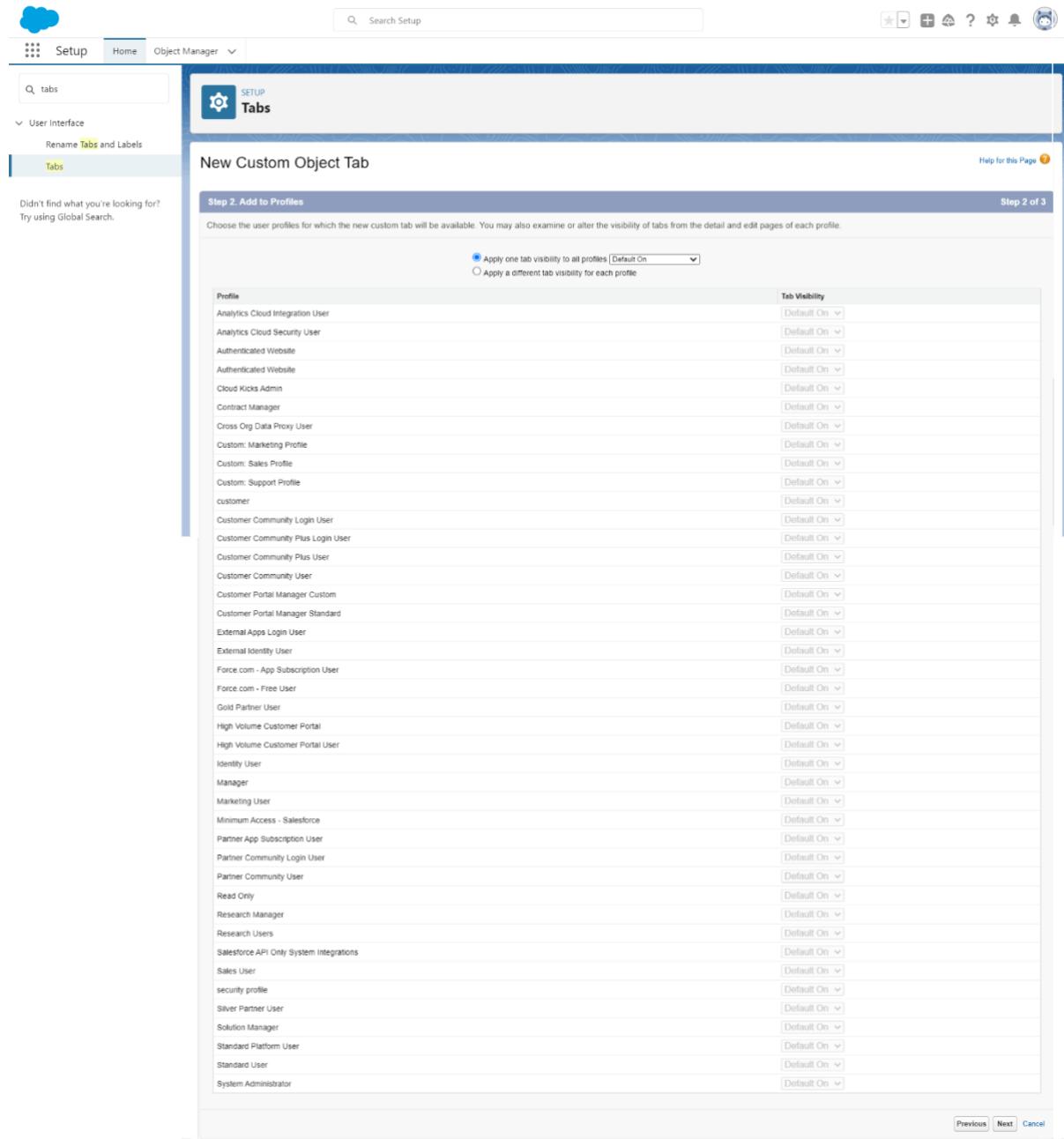
**Quick Find** New Deleted Fields Field Dependencies Set History Tracking

## 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.



Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

Search Setup

SETUP Tabs

### New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

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

Object: college

Tab Style: Jewel

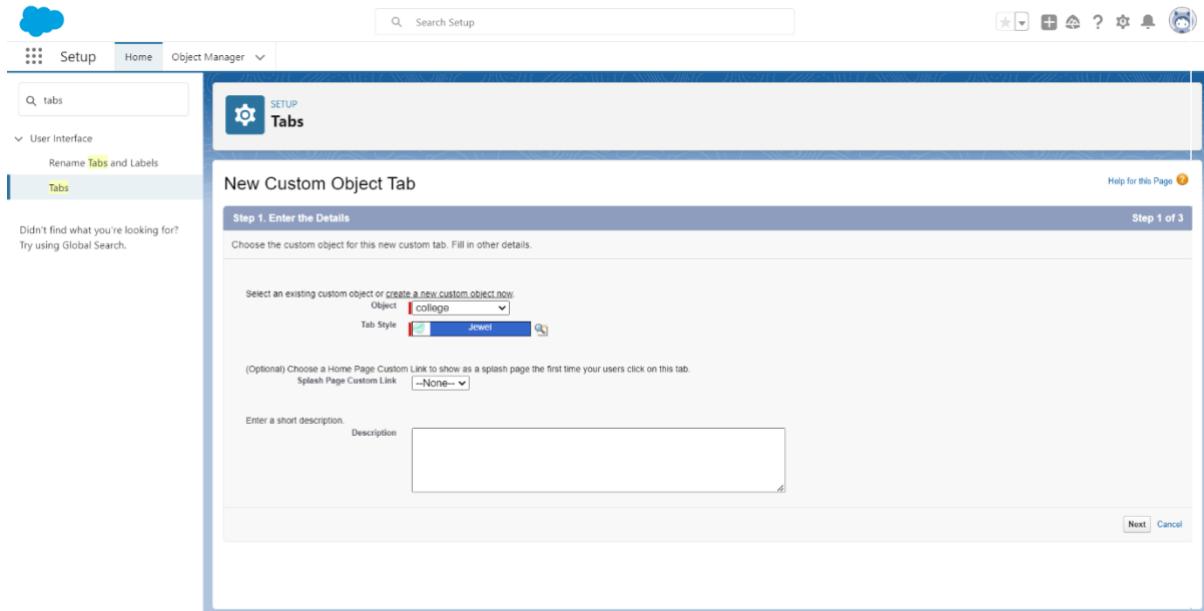
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Enter a short description.

Description:

Next Cancel



Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

Search Setup

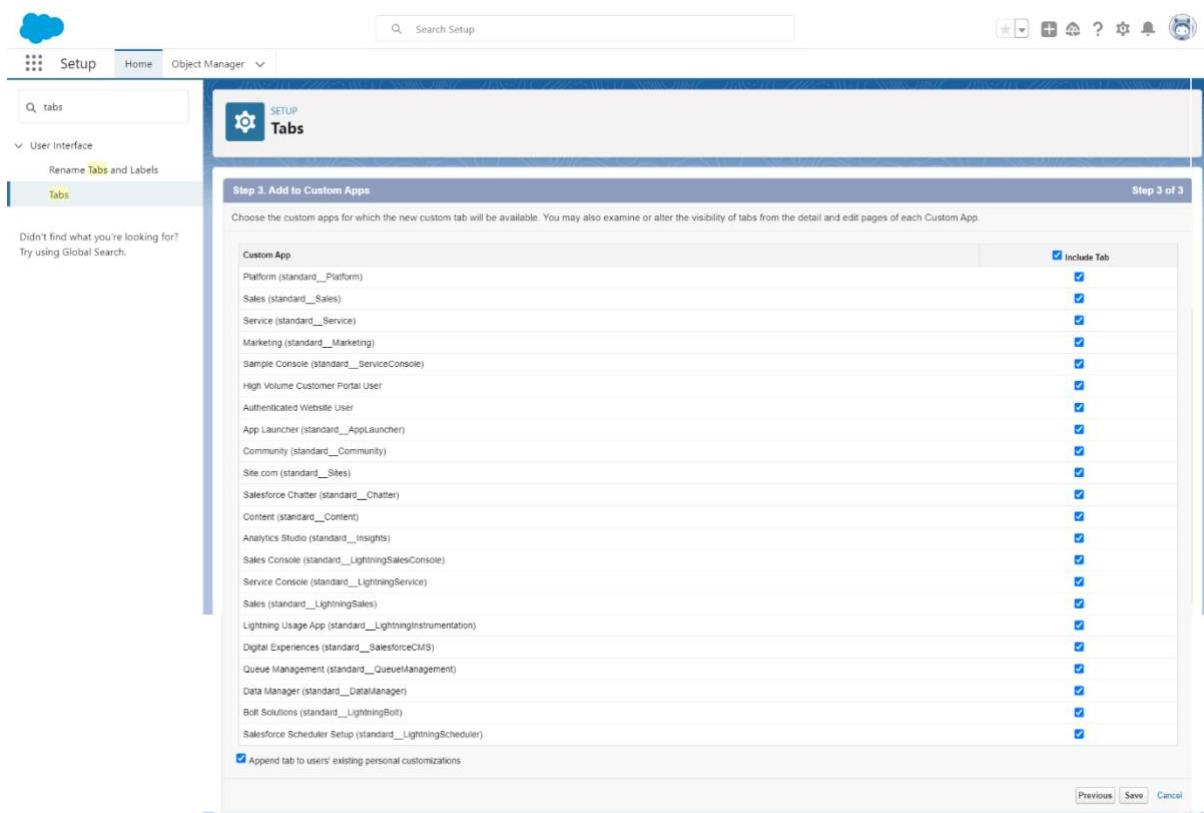
SETUP Tabs

### Step 3. Add to Custom Apps Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

Previous Save Cancel



Search Setup

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details

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

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

Object: CDDepartment

Tab Style: Lightning

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

Splash Page Custom Link: None

Enter a short description.

Description:

Next Cancel

Search Setup

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Packaging

Installed Packages

SETUP Lightning Experience App Manager

New Lightning App New Connected App

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

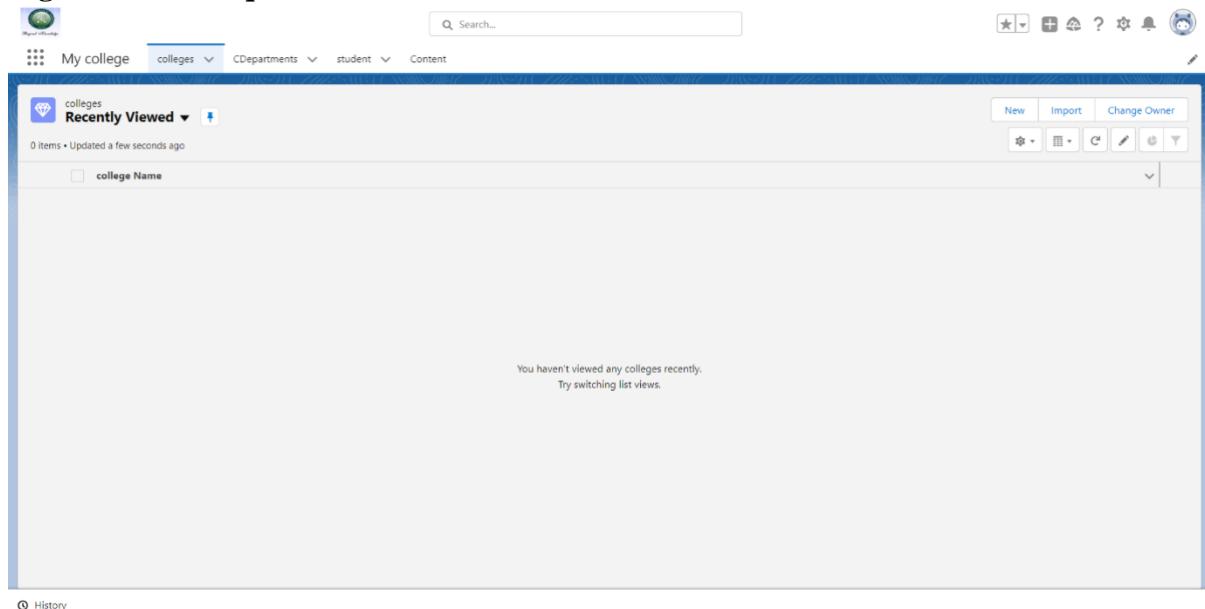
App Name ↑	Developer Name	Description	Last Modified Date	App ...	Visi... ▾
1 All Tabs	AllTabSet		14/07/2023, 10:47 am	Classic	▼
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14/07/2023, 10:47 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	14/07/2023, 10:47 am	Classic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

## Conclusion:

**Now, whenever you create or update a record in the "Department\_\_c" related to a "College\_\_c," the "TotalCount\_\_c" field on the "College\_\_c" will automatically update to show the total number of related records.**

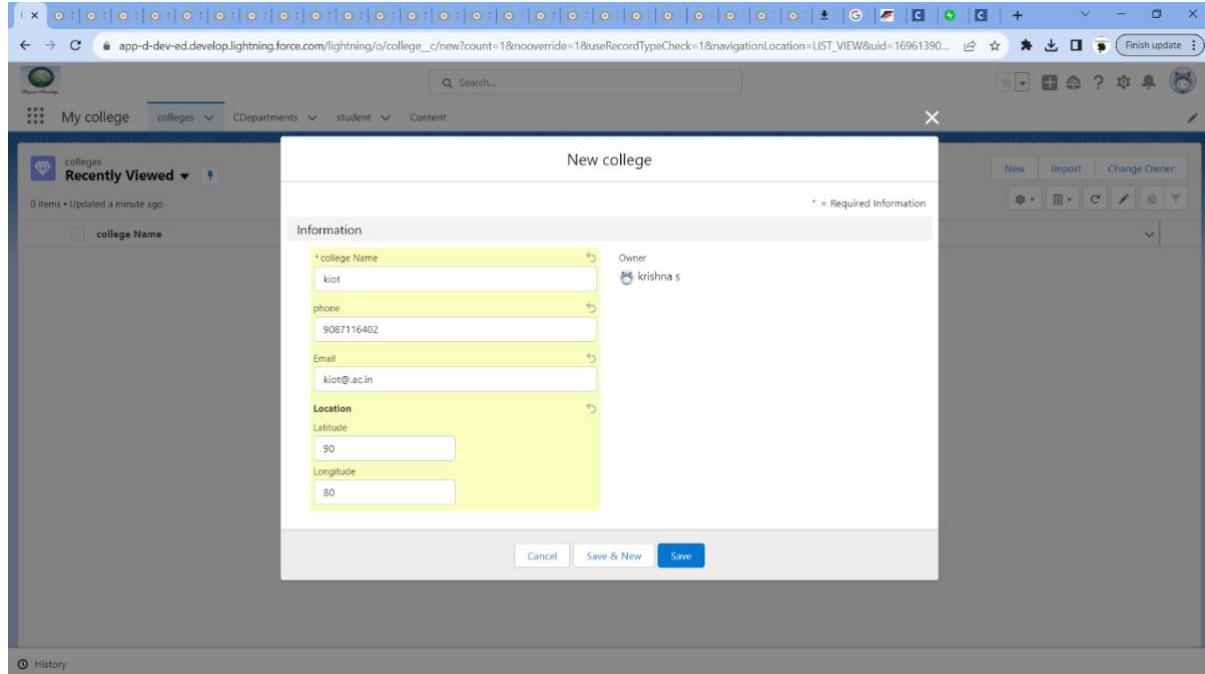
**Remember to adjust field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your**

## organization's requirements.



The screenshot shows a web application interface for managing colleges. The top navigation bar includes links for 'My college', 'colleges', 'CDepartments', 'student', and 'Content'. A search bar is located at the top right. The main content area is titled 'Recently Viewed' under the 'colleges' category. It displays a message: 'You haven't viewed any colleges recently. Try switching list views.' Below this message, there is a single entry: 'college Name'. The interface includes standard toolbar buttons for 'New', 'Import', and 'Change Owner'.

① History



The screenshot shows a 'New college' form within a web application. The URL in the browser is [app-d-dev-ed.lightning.force.com/lightning/o/college\\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\\_VIEW&uid=16961390...](http://app-d-dev-ed.lightning.force.com/lightning/o/college_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=16961390...). The form is titled 'New college' and contains a section for 'Information'. Required fields are marked with an asterisk (\*). The fields and their values are:

Field	Value
college Name	kiot
phone	9087116402
Email	kiot@ac.in
Location	<input type="text" value="90"/> Latitude <input type="text" value="80"/> Longitude

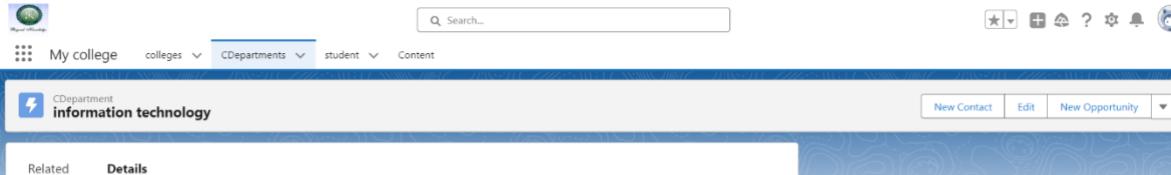
The form also shows the 'Owner' as 'krishna s'. At the bottom, there are buttons for 'Cancel', 'Save & New', and a blue 'Save' button.

The screenshot shows a web-based application interface. At the top, there is a navigation bar with links for 'My college', 'colleges', 'CDEpartments', 'student', and 'Content'. A search bar is located at the top right. The main content area displays a list titled 'CDEpartments' with a single item: 'Recently Viewed'. The item has a status of '1 item • Updated a few seconds ago'. It includes a checkbox for 'Department Name' and a link 'cse'. On the right side of the list view, there are buttons for 'New' and 'Import', and a toolbar with various icons. A dropdown menu is open on the right, showing options like 'New', 'Import', and 'Search'.

① History

The screenshot shows a 'New CDepartment' form. The title bar says 'New CDepartment'. The form is divided into sections: 'Information' and 'Required Information'. The 'Information' section contains fields for 'Department Name' (value: 'information technology'), 'college' (value: 'kiot'), 'email' (value: 'it@gmail.com'), 'phone' (value: '897577568'), and 'hod name' (value: 'arul'). The 'Required Information' section is indicated by a red asterisk next to the 'Department Name' field. At the bottom of the form are buttons for 'Cancel', 'Save & New', and 'Save'.

① History



The screenshot shows a web-based college management system. At the top, there is a navigation bar with icons for home, college, CDepartments, student, and content. A search bar is located in the top right. Below the navigation, a sidebar on the left shows a 'Related' section with a blue 'information technology' icon and the text 'information technology'. The main content area is titled 'Details' and contains a table with the following data:

Field	Value
Department Name	information technology
college	kiot
email	it@gmail.com
phone	897577568
hod name	arul
about	

At the bottom, there are 'Created By' and 'Last Modified By' sections, both showing 'krishna s.' and the date '01/10/2023, 11:19 am'. A blue decorative bar is at the bottom of the page.

History

My college

colleges CDepartments student Content

Search...

college kiot

New Contact Edit New Opportunity

Related	Details
college Name	
kiot	
Total count	
1	
phone	
9087116402	
Email	
kiot@gmail.com	
Location	
90, 80	
Created By	Last Modified By
krishna s. 01/10/2023, 11:16 am	krishna s. 01/10/2023, 11:17 am

My college colleges CDepartments student Content

Recently Viewed ▾

1 item • Updated a few seconds ago

college Name
1 kiot

New Import Change Owner

History

My college colleges CDepartments student Content

college kiot

Related Details

college Name	kiot	Owner	krishna s
Total count	2		
phone	9087116402		
Email	kiot@gmail.com		
Location	90, 80		

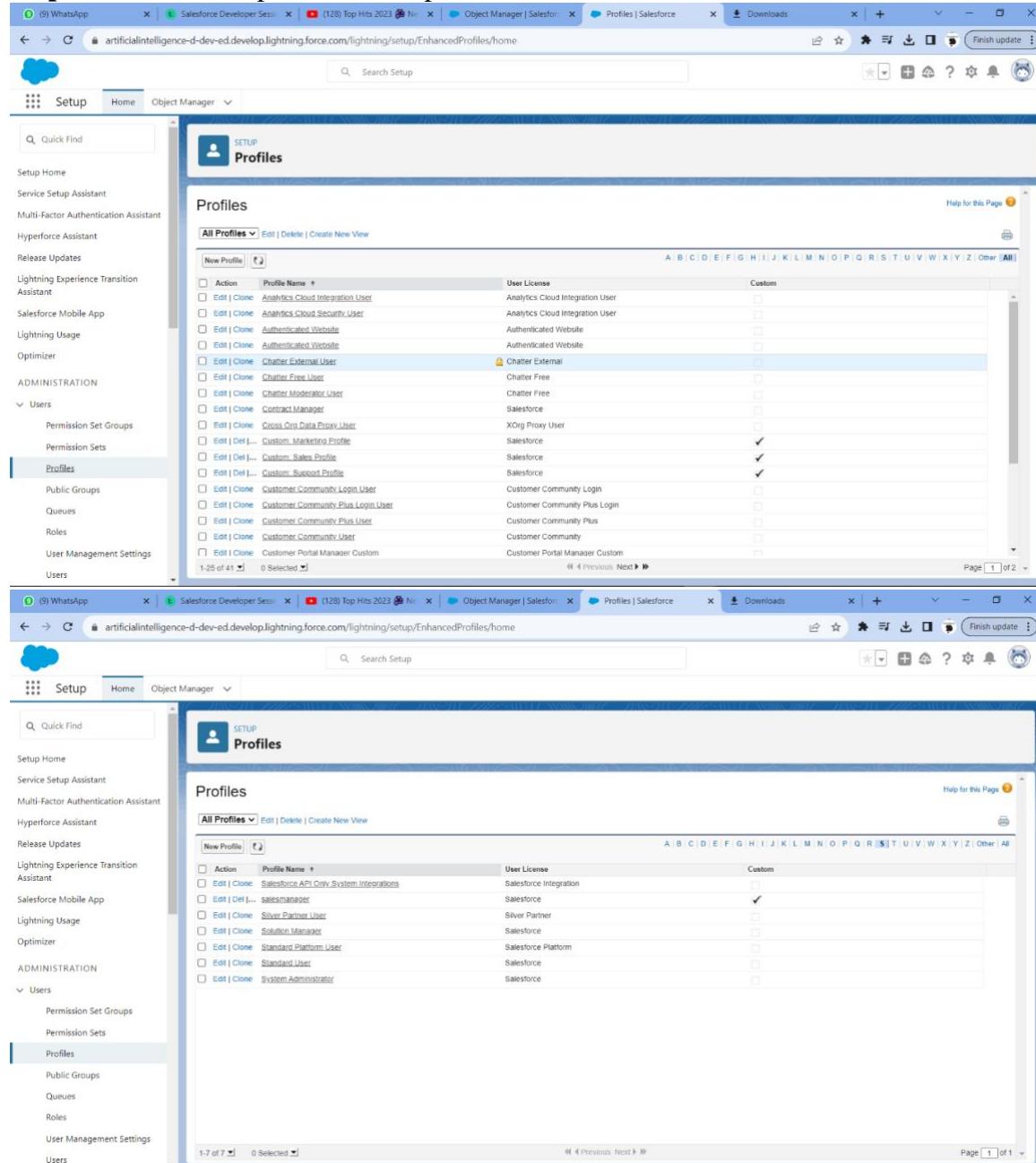
Created By krishna s, 01/10/2023, 11:16 am

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

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

**Solution:**

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

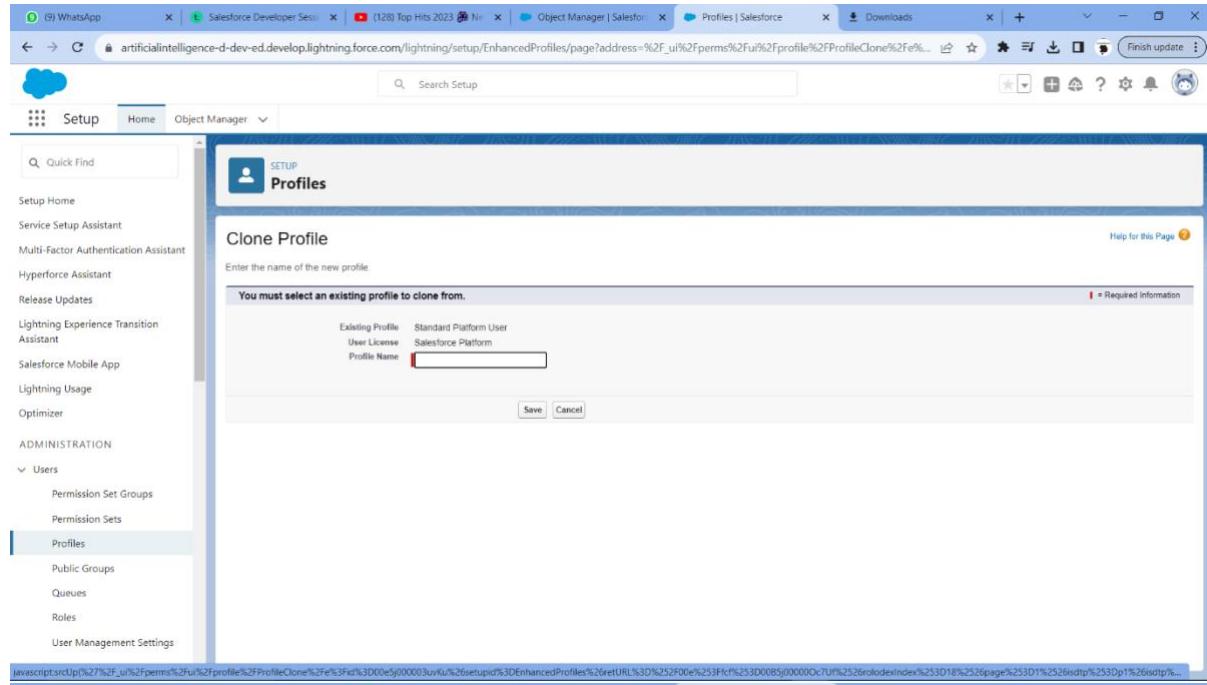


The screenshots show the Salesforce Setup Profiles page. The top screenshot displays the 'Chatter External User' profile, which is a custom profile. The 'Custom' checkbox is checked in the 'User License' column. The bottom screenshot displays the 'Salesforce API Only System Integrations' profile, which is also a custom profile. The 'Custom' checkbox is checked in the 'User License' column.

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

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



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

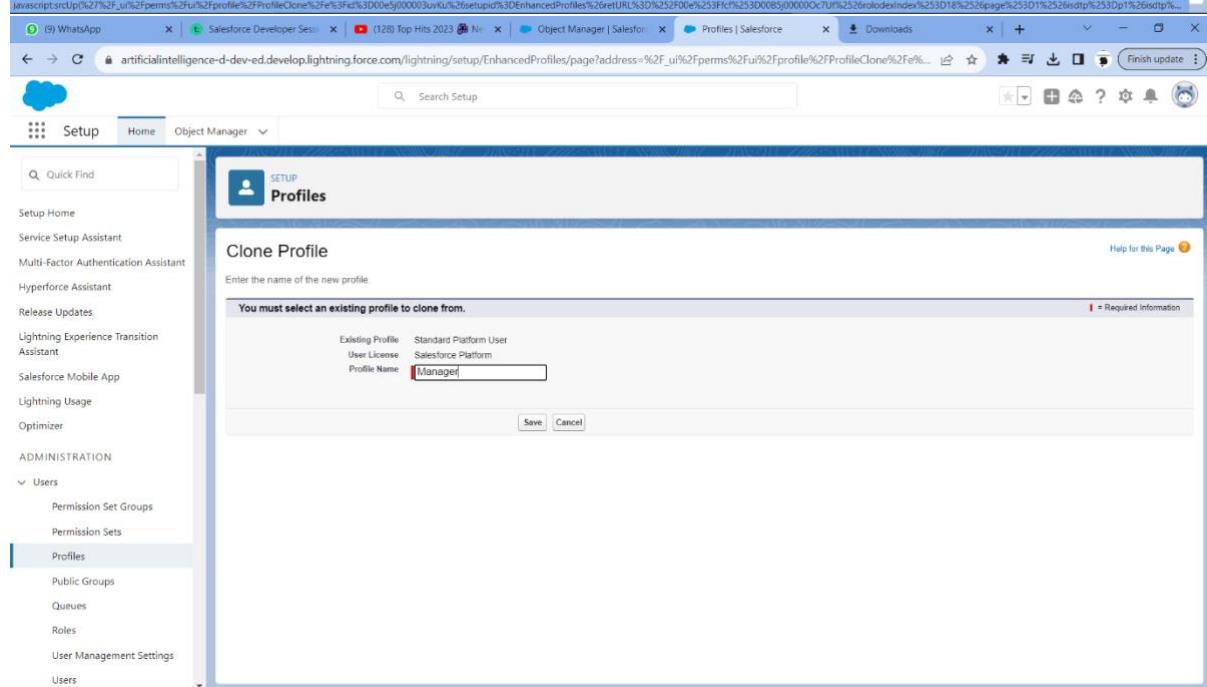
Clone Profile

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:

Save Cancel



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

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:

Save Cancel

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

## Setup Profiles Manager

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.

**Profile Detail**

Name: Manager	Custom Profile: <input checked="" type="checkbox"/>
User License: Salesforce Platform	Created By: QOPAL_S 01/10/2023, 7:09 pm
Description:	Modified By: QOPAL_S 01/10/2023, 7:09 pm

**Page Layouts**

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

**Record Type Settings**

Enabled Record Types:  Enabled Record Type Access

**Custom App Settings**

Name: Manager

User License: Salesforce Platform

Description:

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations:

Standard Tab Settings	Home: Default On	Learning: Default On
Accounts	Accounts: Default On	Libraries: Tab Hidden
Alert Settings	Alert Settings: Default On	Lightning Bolt Solutions: Default On

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

## Setup Profiles Manager

Set the permissions and page layouts for this profile.

**Profile Edit**

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

**Custom App Settings**

Name: Manager

User License: Salesforce Platform

Description:

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations:

Standard Tab Settings	Home: Default On	Learning: Default On
Accounts	Accounts: Default On	Libraries: Tab Hidden
Alert Settings	Alert Settings: Default On	Lightning Bolt Solutions: Default On

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

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

Profiles

Communication Subscription Channel Types

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

Custom Object Permissions

	Bank	customers	Enhancement Requests											
Basic Access	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"/>	Basic Access	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"/>	
Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days	Enforce password history: 3 passwords remembered	Minimum password length: 8
>Password complexity requirement: Must include alpha and numeric characters	Password question requirement: Cannot contain password	Maximum invalid login attempts: 10
Lockout effective period: 15 minutes	Other account settings for remembered	

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

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

Profiles

Communication Subscription Channel Types

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days	Enforce password history: 3 passwords remembered	Minimum password length: 8
>Password complexity requirement: Must include alpha and numeric characters	Password question requirement: Cannot contain password	Maximum invalid login attempts: 10
Lockout effective period: 15 minutes	Other account settings for remembered	

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

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

Custom Object Permissions

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

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

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

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

Custom Object Permissions

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

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

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

## Users

All Users

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

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Adanna Divya	datan	test_divya_pas_4w@b1v62wkk.ts2gr3t8kxox_3q@b0fwyzwms.h43tkzv6mea@gmail.com		<input checked="" type="checkbox"/>	JMS User
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty_005f000000bc3akeab.io0fwmprojte@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	Ellington Amelia	aelli	amelia.elington.1.46kxp9009h.dlcwypdcu4wh.hnbdwmywthbz.wguctor1daly@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	S_GOPAL	GS	kot520@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	User_Integration	integ	integration@0005000000bc3akeab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@0005000000bc3akeab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

[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 | [All](#)

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

## Users

New User

User Edit

General Information

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

Role:  [i](#)

User License:  [i](#)

Profile:  [i](#)

Active:

Marketing User:

Office User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type:  [i](#)

Data.com Monthly Allocation Limit:  [i](#)

Accessibility Mode (Classic Only):  [i](#)

High-Contrast Palette on Charts:  [i](#)

Load Lightning Pages While Scrolling:  [i](#)

Debug Mode:  [i](#)

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

Setup Home Object Manager

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

ADMINISTRATION  
Users  
Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings  
Users  
Data  
Email

PLATFORM TOOLS  
Apps  
Features

Users

SETUP Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmya  
Last Name: bala  
Alias: sbala  
Email: 2k20ce179@kot.ac.in  
Username: 2k21it@kot.ac.in  
Nickname: User16961677128256452616  
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:

Help for this Page

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

Setup Home Object Manager

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

ADMINISTRATION  
Users  
Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings  
Users  
Data  
Email

PLATFORM TOOLS  
Apps  
Features

Users

SETUP Users

User: sowmya bala

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 | Manager in the Rule 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

Edit Sharing Reset Password Login Freeze

Name: sowmya bala  
Alias: bala  
Email: 2k20ce179@kot.ac.in (Verify)

Username: 2k21it@kot.ac.in  
Nickname: User16961677128256452616  
Title: worker  
Company: kot bank  
Department:   
Division:   
Address:   
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English  
Delegated Approver: Manager  
Receive Approval Request Emails: Only if I am an approver  
Federation ID:   
App Registration: One Time Password:   
App Registration: Salesforce Authenticator:

Role:   
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:   
Mobile Push Registrations:   
Data.com User Type:   
Accessibility Mode (Classic Only):   
Debug Mode:   
High-Contrast Palette on Charts:   
Load Lightning Pages While Scrolling:   
Salesforce CRM Content User:

User Profile Help for this Page

Screenshot of a Gmail inbox showing an email from support@salesforce.com. The email subject is "Welcome to Salesforce!" and contains a verification link.

**Email Details:**

- From: support@salesforce.com
- To: me
- Subject: Welcome to Salesforce!
- Time: 7:13 PM (0 minutes ago)
- Message ID: 5.318

**Email Content:**

Welcome to Salesforce!

Click below to verify your account.

**Verify Account**

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

Username:  
2k21lt@kiot.ac.in

Again, welcome to Salesforce!

© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.

Screenshot of a Salesforce password change page.

**Page Title:** Change Your Password

**Form Fields:**

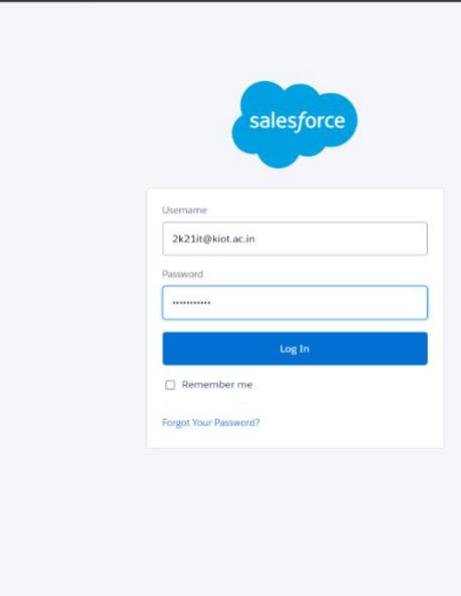
- Enter a new password for 2k21lt@kiot.ac.in. Make sure to include at least:
  - 8 characters
  - 1 letter
  - 1 number
- New Password:  (Good)
- Confirm New Password:  (Match)
- Security Question: In what city were you born?
- Answer: salem

**Buttons:**

- Change Password

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

Login | Salesforce + artificialintelligence-d-dev-ed.develop.my.salesforce.com Incognito Finish update



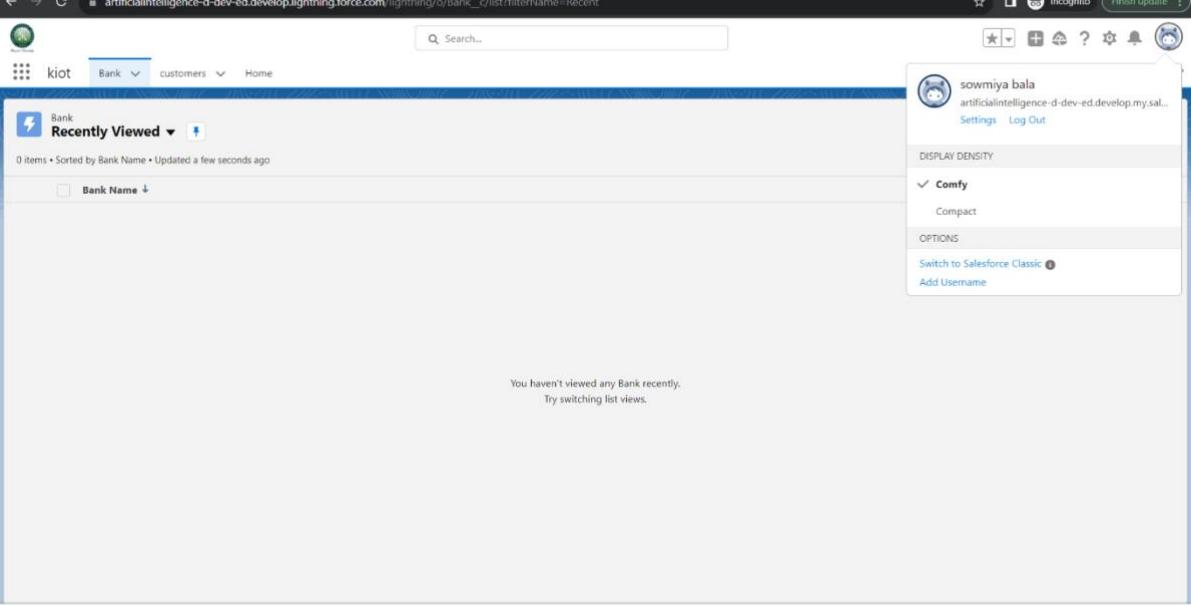
Join us for the future of trusted enterprise AI, streaming on Salesforce+.

WATCH ON DEMAND



© 2023 Salesforce, Inc. All rights reserved.

Recently Viewed | Bank | Salesfo + artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank\_c/list?filterName=Recent Incognito Finish update



Search... Bank customers Home

Recently Viewed Bank

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

Bank Name Bank Name

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

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

DISPLAY DENSITY ✓ Comfy Compact

OPTIONS Switch to Salesforce Classic Add Username

The image displays two screenshots of the Salesforce Lightning Experience interface, showing the creation of new records.

**Top Screenshot: New Bank Record**

The title bar shows "New Bank | Salesforce". The URL is "artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank\_\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=16...". The page is titled "New Bank".

**Information Section:**

- \*Bank Name:** boi
- Owner:** sowmiya bala
- phoneno:** 0997754534

**Buttons:** Cancel, Save & New, Save

**Bottom Screenshot: New customer Record**

The title bar shows "New customer | Salesforce". The URL is "artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer\_\_c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=16...". The page is titled "New customer".

**Information Section:**

- \*customer Name:** madhu
- \*Bank:** boi

**Buttons:** Cancel, Save & New, Save



A screenshot of a Salesforce Lightning interface. The top navigation bar shows the URL [artificialintelligence-d-dev-ed.lightning.force.com/lightning/r/customer/\\_c/a025j00000f0YfaAAM/view](https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/r/customer/_c/a025j00000f0YfaAAM/view). The page title is "madhu | customer | Salesforce". The top right corner includes browser controls for "Incognito" and "Finish update". The main content area shows a customer record for "madhu". The customer card displays the name "madhu" and a green success message: "customer 'madhu' was created." Below the card, the "Details" tab is selected, showing the following data:

Field	Value
customer Name	madhu
Bank	bol

At the bottom, the "Created By" and "Last Modified By" fields are both populated with "sowmiya bala, 01/10/2023, 7:17 pm".



The screenshot shows the Salesforce 'Profiles' setup page. The left sidebar is titled 'Setup' and includes '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', and 'ADMINISTRATION' sections. Under 'ADMINISTRATION', 'Users' is expanded, showing 'Permission Set Groups', 'Permission Sets', 'Profiles' (which is selected and highlighted in blue), 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'Profiles' and shows a table with the following data:

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

At the bottom of the page, there are navigation links for '1 of 1' and '0 Selected', and a footer with 'Page 1 of 1'.

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

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

## Profiles

### Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

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

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

## Profiles

### Profile salesmanager

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

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

Profile Detail	<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a> <a href="#">View Users</a>
Name	<b>salesmanager</b>
User License	Salesforce Platform
Description	
Created By	GOPAL S 01/10/2023, 7:19 pm
Modified By	GOPAL S 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	Not 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 [View Assignment]
Asset	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]
	Asset Layout [View Assignment]	Payment Gateway [View Assignment]



Profiles | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQCE%2Fe%3FretURL%3D%252F...

Search Setup

Setup Home

Quick Find

Setup

Home Object Manager

SETUP Profiles

Profile Edit salesmanage Help for This Page

Set the permissions and page layouts for this profile.

Profile Edit

Name: salesmanage

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

Analytics Studio (standard\_\_Insights)

App Launcher (standard\_\_AppLauncher)

kiot (kiot)

Platform (standard\_\_Platform)

WDC (standard\_\_Work)

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home Default On

Learning Default On

The screenshot shows the Salesforce 'Profiles' setup page. The left sidebar is titled 'Setup' and includes sections for 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Hyperforce Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage Optimizer', and 'ADMINISTRATION' with sub-options for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles' (which is selected and highlighted in blue), 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The main content area has a 'SETUP' icon and the title 'Profiles'. It features a 'Custom Object Permissions' section with tables for 'Bank' and 'customers' under 'Basic Access' and 'Data Administration'. Below this are 'Session Settings' (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login: None) and 'Password Policies' (User passwords expire in: 90 days, Enforce password history: 3 passwords remembered, Minimum password length: 8, Password complexity requirement: Must include alpha and numeric characters, Password question requirement: Cannot contain password, Maximum invalid login attempts: 10, Lockout effective period: 15 minutes, Obscure secret answer for password resets, Require a minimum 1 day password lifetime, and Don't immediately expire links in forgotten password emails). The top navigation bar includes tabs for 'Salesforce Developer Session 2', 'Top Hits 2023', 'Profiles | Salesforce', 'Welcome to Salesforce: Verify', and 'Finish update'.

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Post | Profiles | Salesforce | Welcome to Salesforce: Verify...

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Save | Save & New | Cancel

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

Setup Home | Home | Object Manager | Search Setup

Q user | user

Users | User Management Settings | Users | Prospector | Data.com | Service | Embedded Service | User Interface | Action Link Templates | Actions & Recommendations | App Menu

New User

User Edit

General Information

First Name	<input type="text"/>	Role	<None Specified>
Last Name	<input type="text"/>	User License	Salesforce Integration
Aliases	<input type="text"/>	Profile	Salesforce API Only System Integrations
Email	<input type="text"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text"/>	Office User	<input type="checkbox"/>
Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>
Company	<input type="text"/>	Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Service Cloud User	<input type="checkbox"/>
Division	<input type="text"/>	Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	<None>
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Debug Mode	<input type="checkbox"/>

Help for this Page

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Post | Users | Salesforce | Welcome to Salesforce: Verify your email | Finish update

Setup Home Object Manager

Search Setup

Users

New User

User Edit

General Information

First Name	machu
Last Name	b
Alias	mb
Email	2k20cse179@kiot.ac.in
Username	2k20cse179@kiot.ac.in
Nickname	User169616842428654192
Title	worker
Company	kiot bank
Department	Sales
Division	

Role: <None Specified>

User License: Salesforce Platform

Profile: salesmanager

Active:

Marketing User:

Office User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

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:

Help for this Page

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Post | Users | Salesforce | Welcome to Salesforce: Verify your email | Finish update

Setup Home Object Manager

Search Setup

Users

Mailing Address

Street:

City:

Zip/Postal Code:

State/Province:

Country:

Single Sign On Information

Federation ID:

Locale Settings

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

Locale: English (India)

Language: English

Approver Settings

Delegated Approver:

Manager:

Receive Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately

Save Save & New Cancel

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

Setup Home Object Manager

Q. user

Users

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings  
Users  
Feature Settings  
Data.com  
Prospector  
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: 4/194, aryampalayam, uthamasolapuram ..  
City: SALEM  
Zip/Postal Code: 636308  
State/Province: TAMIL NADU  
Country:

Single Sign On Information

Federation ID:

Locale Settings

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

Approver Settings

Delegated Approver:   
Manager:   
Receive Approval Request Emails: Only if I am an approver  
Generate new password and notify user immediately:

Save Save & New Cancel

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

Setup Home Object Manager

Q. user

Users

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

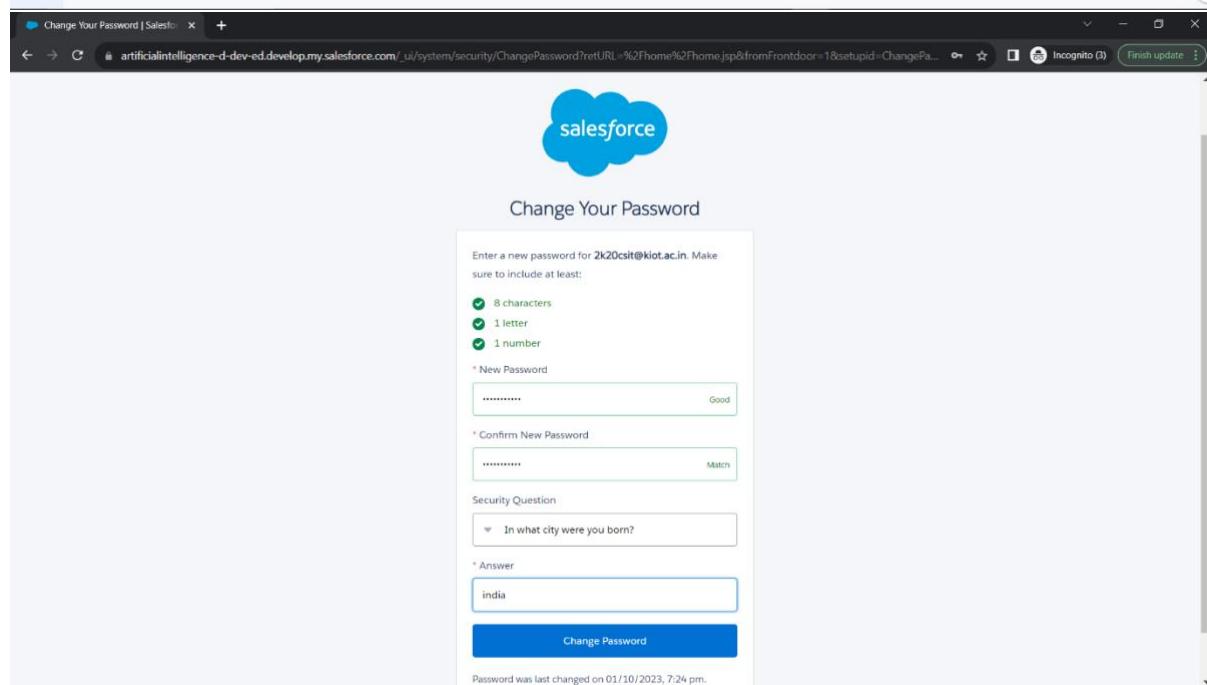
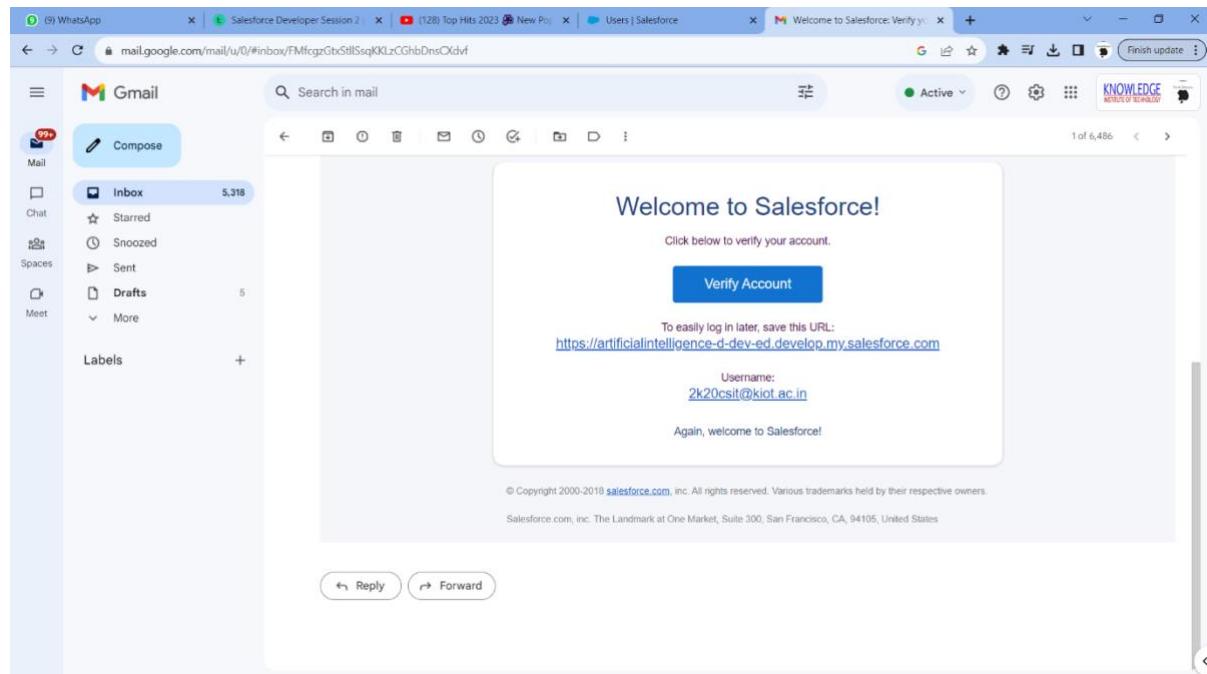
SETUP Users

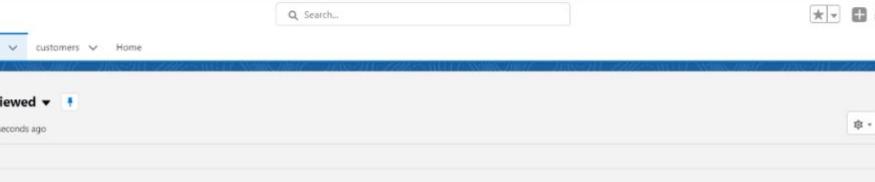
User: madhu b

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

User Detail

User Detail		Role	
Name: madhu b	Alias: mb	User License: Salesforce Platform	Profile: salesmanager
Email: 2k20cse179@kot.ac.in (Verify) <a href="#">[i]</a>	Username: 2k20cse179@kot.ac.in	Active: <input checked="" type="checkbox"/>	Marketing User: <input type="checkbox"/>
Nickname: User16961684242865419206	Title: worker	Offline User: <input type="checkbox"/>	Knowledge User: <input type="checkbox"/>
Company: kot bank	Department: Sales	Flow User: <input type="checkbox"/>	Service Cloud User: <input type="checkbox"/>
Division:	Address: 4/194, aryampalayam, uthamasolapuram .. Paraiakkadu , salem- 636308	Site.com Contributor User: <input type="checkbox"/>	Site.com Publisher User: <input type="checkbox"/>
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)	Locale: English (India)	Mobile Push Registrations: <a href="#">View</a>	Data.com User Type: <a href="#">[i]</a>
Language: English	Delegated Approver: Manager: <input type="text"/>	Accessibility Mode (Classic Only): <a href="#">[i]</a>	WDC User: <a href="#">[i]</a>
Receive Approval Request Emails: Only if I am an approver	Federation ID: <input type="text"/>	Debug Mode: <a href="#">[i]</a>	High-Contrast Palette on Charts: <a href="#">[i]</a>
App Registration: One-Time Password Authenticator: <input type="text"/>	App Registration: One-Time Password Authenticator: <a href="#">[i]</a>	Load Lightning Pages While Scrolling: <input checked="" type="checkbox"/>	Enhanced COM+ Context User: <a href="#">[i]</a>





Recently Viewed | Bank | Sales[...]

artificialintelligence-d-dev-ed.lightning.force.com/lightning/o/Bank\_\_c/list?filterName=Recent

Search...

kiot Bank customers Home

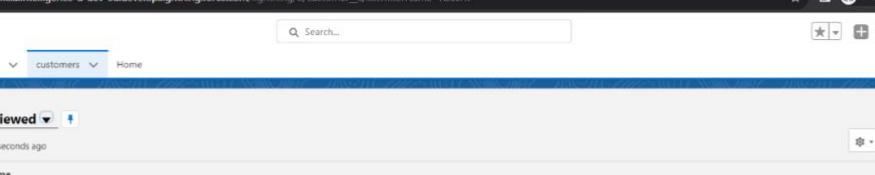
Bank

**Recently Viewed**

0 items • Updated a few seconds ago

Bank Name

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



The screenshot shows the Salesforce Lightning interface. At the top, there is a navigation bar with a back arrow, forward arrow, and a search bar containing the placeholder "Search...". The URL in the address bar is [artificialintelligence-d-dev-ed.lightning.force.com/lightning/o/customer\\_c/list?filterName=Recent](https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/o/customer_c/list?filterName=Recent). The top right corner features icons for star, refresh, incognito, and a "Finish update" button. Below the navigation bar, the page header includes a profile icon, the name "kiot", and navigation links for "Bank", "customers", and "Home". A search bar is positioned above the main content area. The main content area has a blue header bar with the text "customers" and a blue lightning bolt icon. Below this, a section titled "Recently Viewed" is displayed, with a dropdown arrow icon. A message indicates "0 items · Updated a few seconds ago". A search bar for "customer Name" is present. The bottom of the page displays a message: "You haven't viewed any customers recently. Try switching list views.".



The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar includes 'Setup', 'Home', 'Object Manager', and sections for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', 'Data.com', 'Prospector Users', 'Service', 'Embedded Service', 'Messaging for In-App and Web User Verification', and 'User Interface' (with 'Action Link Templates' and 'Actions & Recommendations'). The main content area has a 'Permission Sets' header with a user icon. Below it is a table with the following columns: 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists 29 permission sets, such as 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', 'Facility Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order Management Agent', 'Order Management Operations Manager', and 'Order Management Shopper'. Each row includes a checkbox for 'Action', 'Delete/Clone', 'Clone', and 'Edit'. The 'Description' column provides a brief overview of the permission set's purpose, and the 'License' column indicates the specific permission set license required. The bottom of the page shows a navigation bar with '1-25 of 29' and '0 Selected', and a footer with 'Previous' and 'Next' buttons.

## 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:

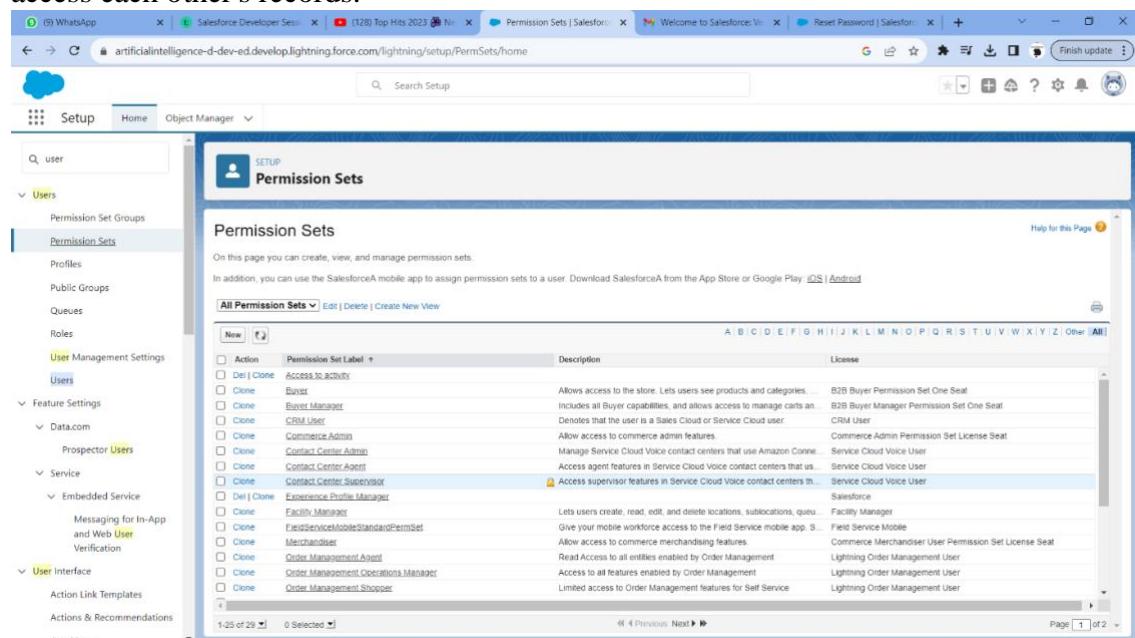
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

### 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 has columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The 'Permission Set Label' column lists various roles and features, such as 'Buyer', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Facility Manager', 'Merchandiser', 'Order Management Agent', 'Order Management Operations Manager', and 'Order Management Shopper'. The 'Description' column provides a brief overview of the permissions granted by each set. The 'License' column shows the specific license required for each set, such as 'B2B Buyer Permission Set One Seat' or 'Field Service Mobile'. The table is paginated at the bottom, showing '1-25 of 29' and '0 Selected'.

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce | Finish update

## Permission Sets

**Create**

**Enter permission set information**

Label:  API Name:  Description:

Session Activation Required:

**Select the type of users who will use this permission set**

Who will use this permission set?

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

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

License:  --None--

**Save | Cancel**

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce | Finish update

## Permission Sets

**Create**

**Enter permission set information**

Label:  salesmanager API Name:  salesmanager Description:

Session Activation Required:

**Select the type of users who will use this permission set**

Who will use this permission set?

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

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

License:  --None--

**Save | Cancel**

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce | Finish update

## Permission Sets

**salesmanager**

Video Tutorial | Help for this Page

**Permission Set Overview**

Description	API Name	Namespace Prefix	Created By
License: <input type="checkbox"/>	salesmanager		GOPALS_ 01/10/2023, 7:29 pm
Session Activation Required: <input type="checkbox"/>			
Last Modified By: <a href="#">GOPALS_ 01/10/2023, 7:29 pm</a>			

**Apps**

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

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

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

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

**Apex Class Access**  
Permissions to execute Apex classes

**Visualforce Page Access**  
Permissions to execute Visualforce pages

**External Data Source Access**  
Permissions to authenticate against external data sources

**Flow Access**  
Permissions to execute Flows

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Setup Home Object Manager

## Permission Sets

Permission Set salesmanager

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
Age Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invitees	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

Video Tutorial | Help for this Page

Setup Home Object Manager

## Permission Sets

Permission Set salesmanager

Object Settings

Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Setup Home Object Manager

Search Setup

Permission Sets

Permission Set salesmanager

Object Settings Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Video Tutorial | Help for this Page

Setup Home Object Manager

Search Setup

... > SETUP > PERMISSION SET 'SALESMANAGER'

salesmanager

Current Assignments

Add Assignment



No assignments defined.

Setup Home Object Manager Search Setup

Select Users to Assign

All Users

Full Name	Role	Profile
Amelia Ellington	Force.com - App Subscription User	Force.com - App Subscription User
Chatter Expert	Chatter Free User	Chatter Free User
Diya Adanna	UMS User	UMS User
GOPAL S	System Administrator	System Administrator
Integration User	Analytics Cloud Integration User	Analytics Cloud Integration User
madhu b	salesmanage	salesmanage
Security User	Analytics Cloud Security User	Analytics Cloud Security User
sowmya bala	Manager	Manager

Cancel Next

Search Setup

Q user

Users

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

Feature Settings

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

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Setup Home Object Manager Search Setup

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

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

Cancel Back Assign

Search Setup

Q user

Users

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

Feature Settings

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

User Interface

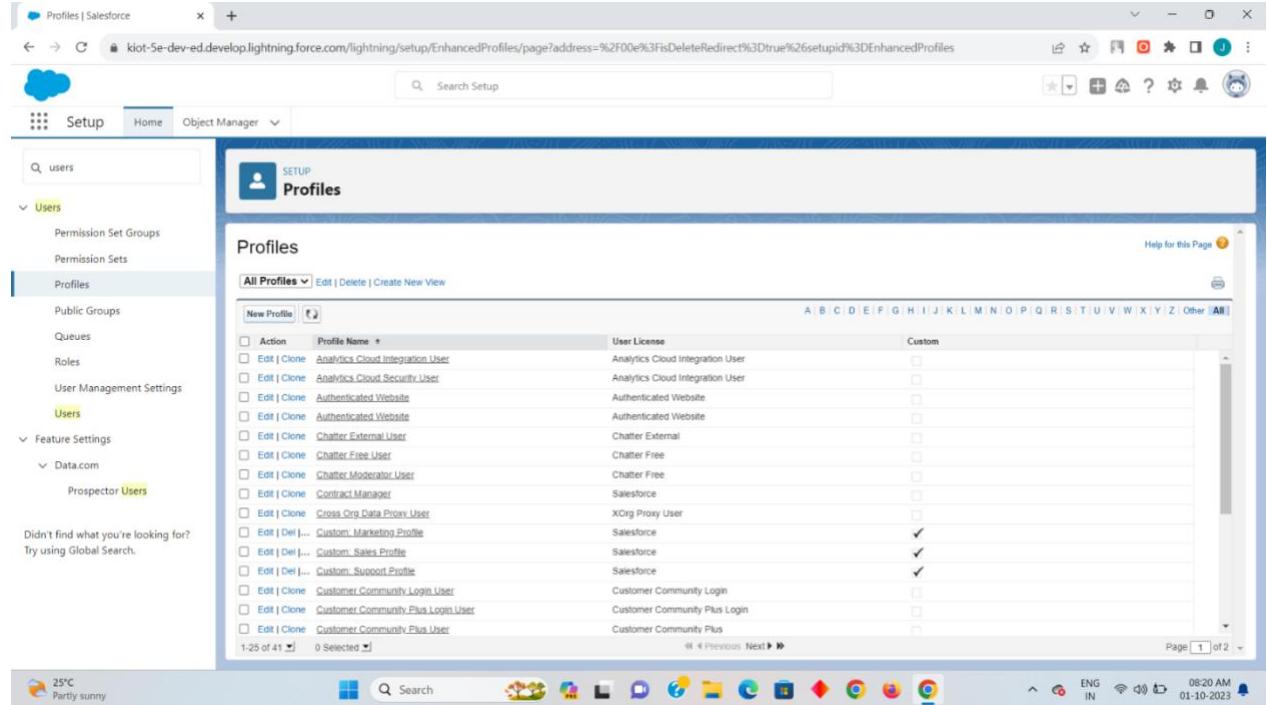
- Action Link Templates
- Actions & Recommendations
- App Menu

The screenshot displays two separate Salesforce interfaces. The top interface is the Setup page, showing the 'Assignment Summary' for a permission set named 'salesmanager'. The summary table lists one assignment for 'madhu b' with a 'User License' of 'Salesforce Platform' and a 'Status' of 'Success'. The bottom interface is a Lightning component titled 'Recently Viewed' under the 'customers' tab. It shows a list with the header 'customer Name' and a message stating 'You haven't viewed any customers recently. Try switching list views.' A 'LIST VIEW CONTROLS' sidebar on the right provides options for 'New', 'Clone', 'Rename', 'Sharing Settings', 'Show List Filters', 'Select Fields to Display', and 'Delete'.

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

**Solution:**

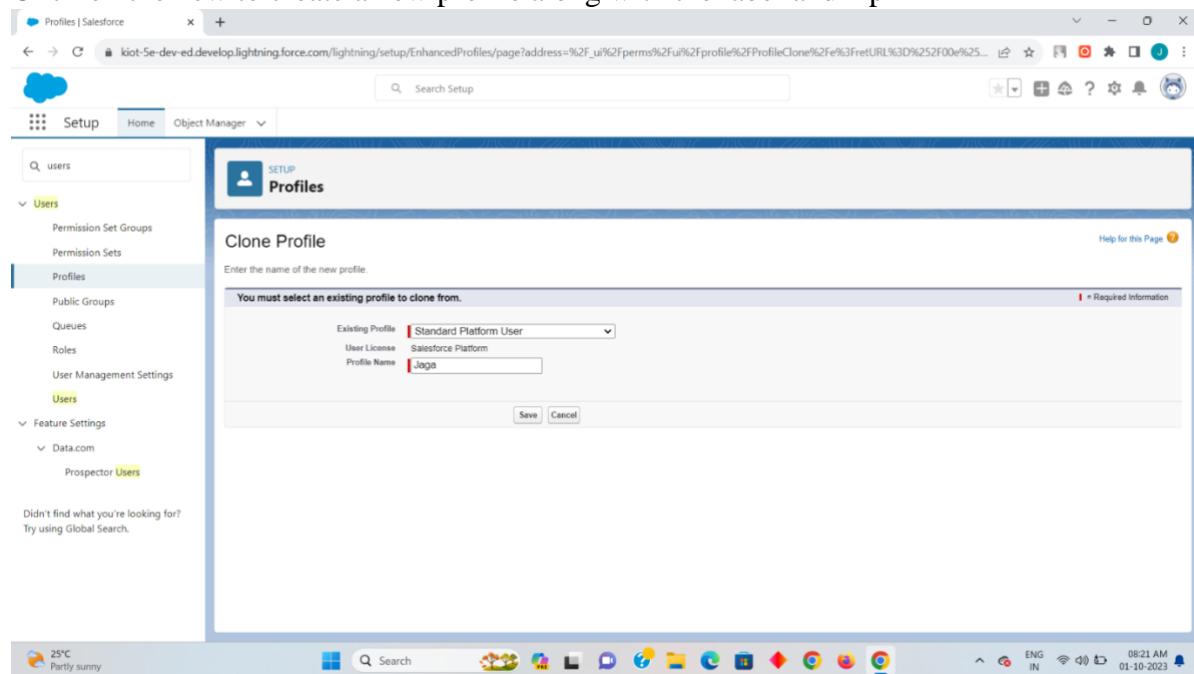
**Step 1:** we need create a profile for the two user which has the access to Create, Read, Edit for follow as per. Setup-quick search[profile]



The screenshot shows the Salesforce Setup interface for managing profiles. The left sidebar is collapsed, and the main content area is titled 'Profiles'. Below the title, there is a sub-header 'All Profiles' with options to 'Edit | Delete | Create New View'. The main table lists various profiles, each with an 'Action' column (containing 'Edit | Clone' links) and a 'User License' column. The table is paginated at the bottom, showing '1-25 of 41' and 'Page 1 of 2'. The status bar at the bottom right indicates '25°C Partly sunny', 'ENG IN', and the date '01-10-2023'.

**Step 2:**

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

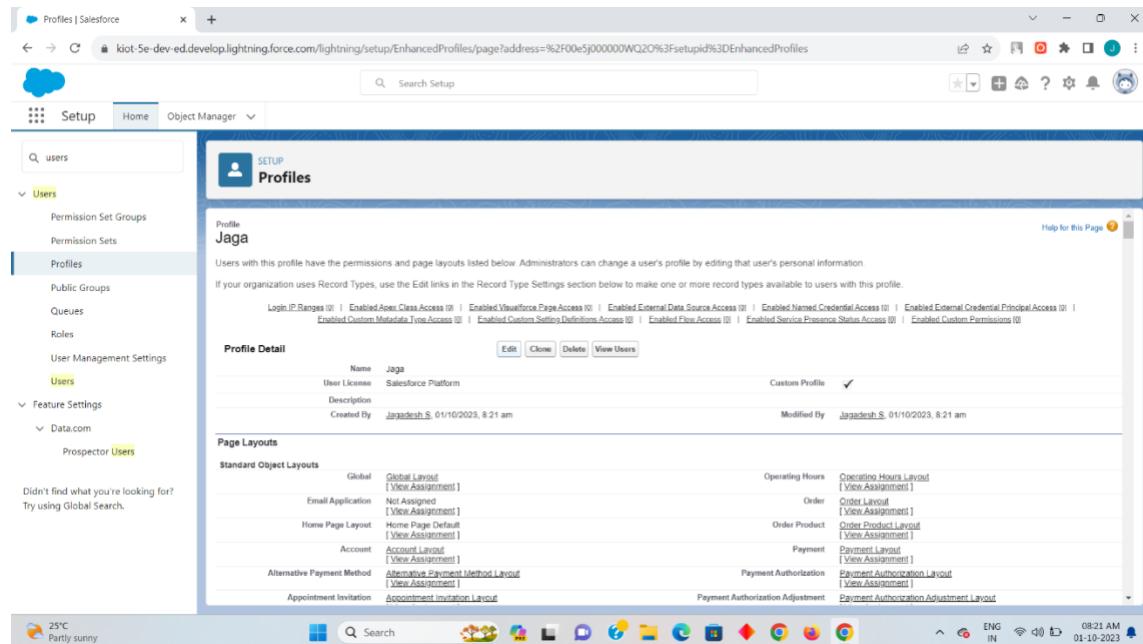


The screenshot shows the 'Clone Profile' page. The title bar says 'Clone Profile'. Below the title, a message says 'You must select an existing profile to clone from.' A dropdown menu labeled 'Existing Profile' is set to 'Standard Platform User'. Below the dropdown, 'User License' is set to 'Salesforce Platform' and 'Profile Name' is set to 'Jaga'. At the bottom of the page are 'Save' and 'Cancel' buttons. The status bar at the bottom right indicates '25°C Partly sunny', 'ENG IN', and the date '01-10-2023'.

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

### Step 3:

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



Profiles | Salesforce +

Setup Home Object Manager

Search Setup

SETUP Profiles

Profile Jaga

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

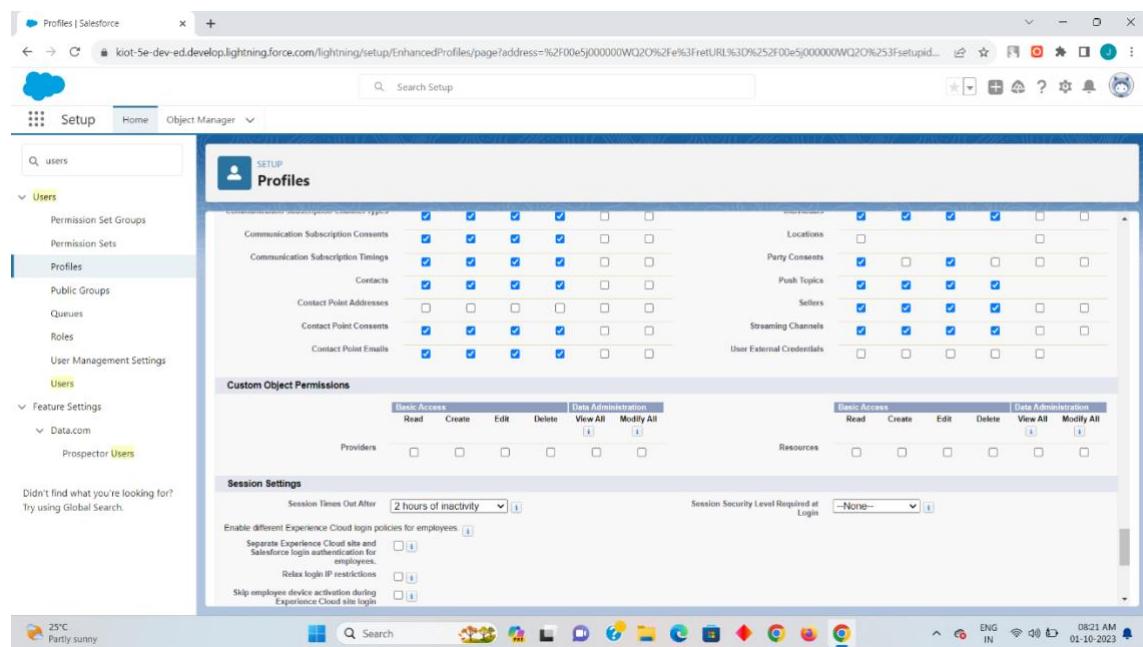
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	Jaga	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	Jagadesh S. 01/10/2023, 8:21 am	Modified By	Jagadesh S. 01/10/2023, 8:21 am

Page Layouts

Standard Object Layouts	Global	Global Layout	Operating Hours	Operating Hours Layout
Email Application	Not Assigned	[View Assignment]	Order	[View Assignment]
Home Page Layout	Not Assigned	[View Assignment]	Order Product	[View Assignment]
Lead	Lead Page Default	[View Assignment]	Order Product Layout	[View Assignment]
Account	Account Layout	[View Assignment]	Payment	Payment Layout
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Payment Authorization	Payment Authorization Layout
Appointment Invitation	Appointment Invitation Layout	[View Assignment]	Payment Authorization Adjustment	Payment Authorization Adjustment Layout



Profiles | Salesforce +

Setup Home Object Manager

Search Setup

SETUP Profiles

Custom Object Permissions

Object	Basic Access					Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All
Communication Subscription	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						

Session Settings

Session Times Out After

Session Security Level Required at Login

Enable different Experience Cloud login policies for employees.

Separate Experience Cloud site and Salesforce login authentication for

Relax login IP restrictions

Skip employee device authentication during Experience Cloud site login

The screenshot shows the Salesforce Lightning Experience setup page for Profiles. The main content area is titled "Profiles" and displays a grid of permissions. The grid has two main sections: "Standard Object Permissions" and "Custom Object Permissions".

**Standard Object Permissions:**

Object	Communication Subscription Consents	Communication Subscription Timings	Contacts	Locations
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Custom Object Permissions:**

Object	Basic Access	Create	Edit	Delete	Data Administration
Providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Resources	<input checked="" type="checkbox"/>				

**Session Settings:**

Session Times Out After: 2 hours of inactivity

Enable different Experience Cloud login policies for employees:

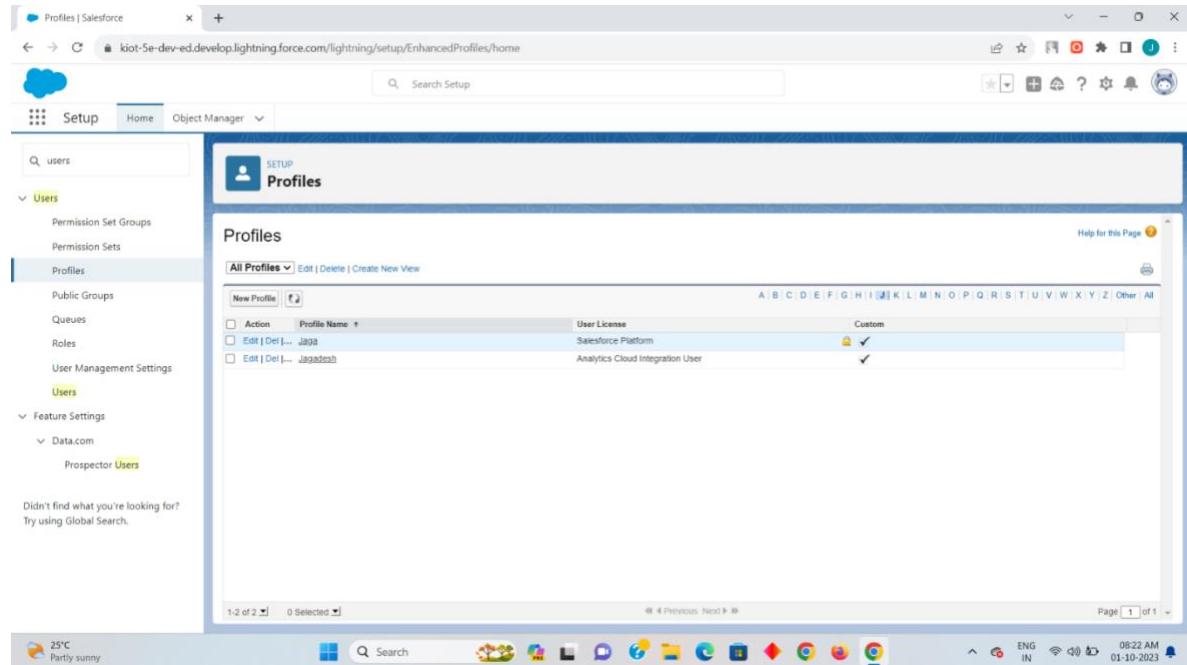
- Separate Experience Cloud site and Salesforce login authentication for employees
- Restrict Experience Cloud login to specific IP addresses
- Skip employee device activation during Experience Cloud site login

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected in the left sidebar. The main content area displays the 'Profile Edit' screen for a profile named 'Jaga'. The profile details include the name 'Jaga', user license 'Salesforce Platform', and a checked 'Custom Profile' checkbox. The 'Custom App Settings' section shows the visibility and default status for various apps: Analytics Studio (standard\_Insights) is visible and default; App Launcher (standard\_AppLauncher) is visible and default; and Hive App (Hive\_App) is visible and default. The 'Service Provider Access' and 'Tab Settings' sections are also visible. The top navigation bar includes a search bar and various setup icons. The bottom of the screen shows the Windows taskbar with several open application icons.

## Step 4

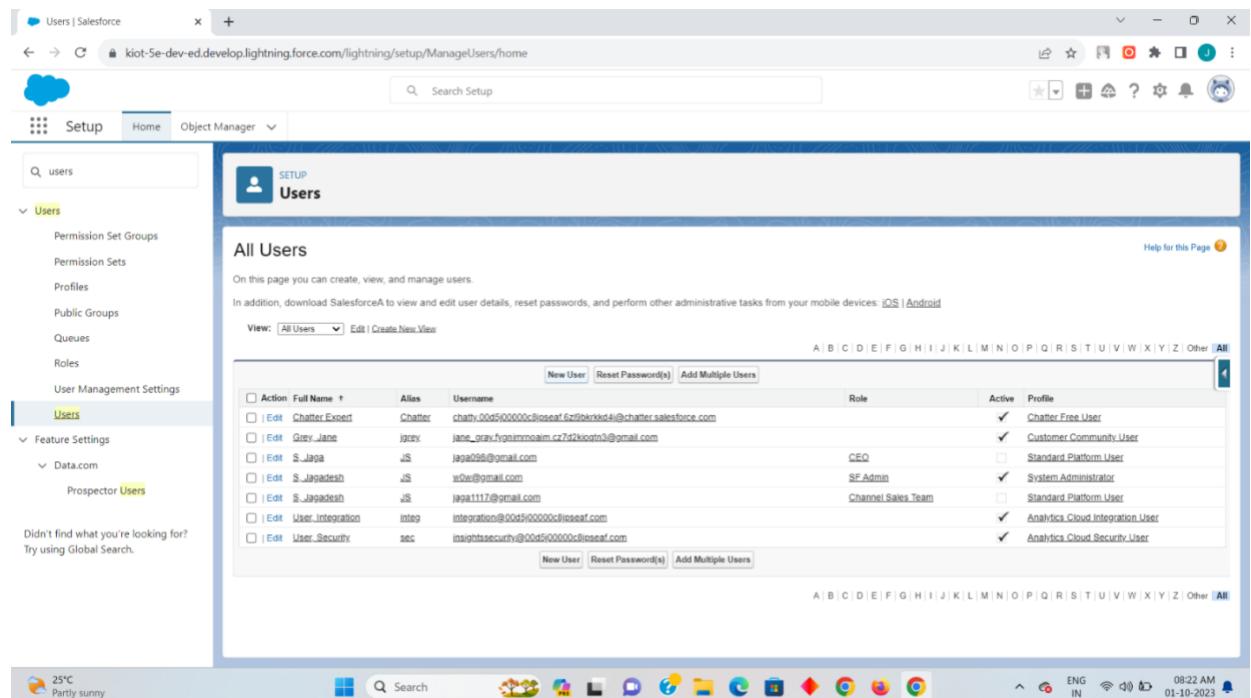
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it



The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar shows 'Users' is selected. The main content area displays a table of profiles. A new profile named 'Jaga' is listed, showing it has the 'Salesforce Platform' user license and is assigned to the 'Custom' category. The table includes columns for Action, Profile Name, User License, and Category. The URL in the browser is [kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home](https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home).

## 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 under the Users section. The left sidebar shows 'Users' is selected. The main content area displays a table of users. Two users are listed: 'Chatter\_Ewend' and 'Grey\_Jane', both assigned to the 'Jaga' profile. The table includes columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The URL in the browser is [kiot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home](https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home).

New User

User Edit

General Information

First Name	Jagadesh11
Last Name	S
Alias	S
Email	jag123@gmail.com
Username	jag123@gmail.com
Nickname	User169612875144962592
Title	
Company	
Department	
Division	

Role: Director, Channel Sales

User License: Salesforce Platform

Profile: Standard Platform User

Active: Yes

Marketing User: Standard Platform User

New User

User Edit

General Information

First Name	Jagadesh22
Last Name	B
Alias	B
Email	jag1@gmail.com
Username	jag1@gmail.com
Nickname	User169612879983618745
Title	
Company	
Department	
Division	

Role: Marketing Team

User License: Salesforce Platform

Profile: Standard Platform User

Active: Yes

Marketing User: Standard Platform User

All Users

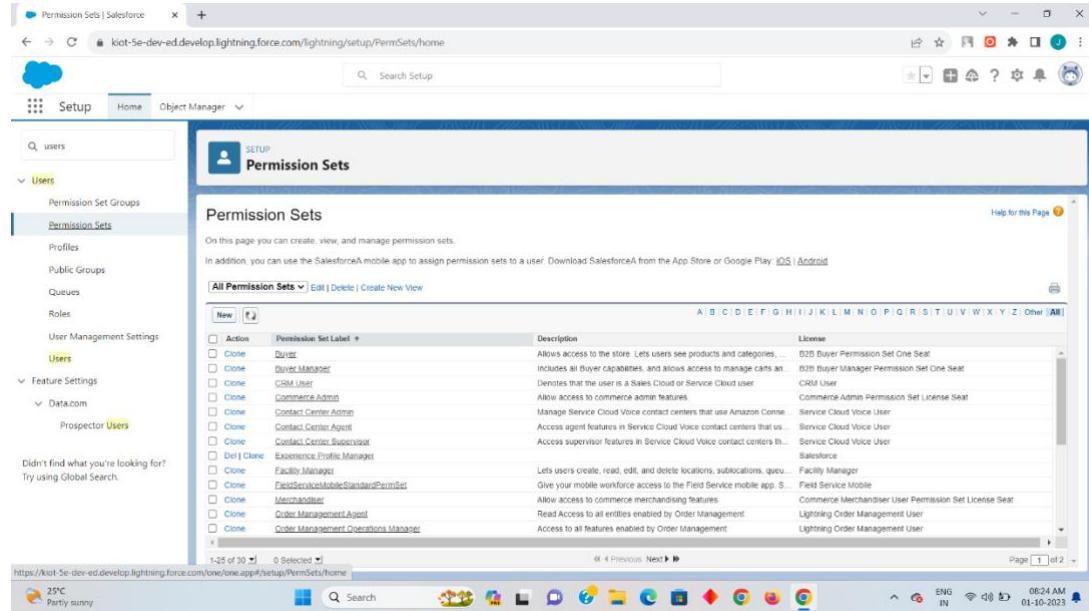
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	S.Jagadesh	S	jag100@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S.Jagadesh11	S	w0x@gmail.com	SE Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S.Jagadesh11	S	jag1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	S.Jagadesh11	S	test123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	S.Jagadesh22	S	test123@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

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.

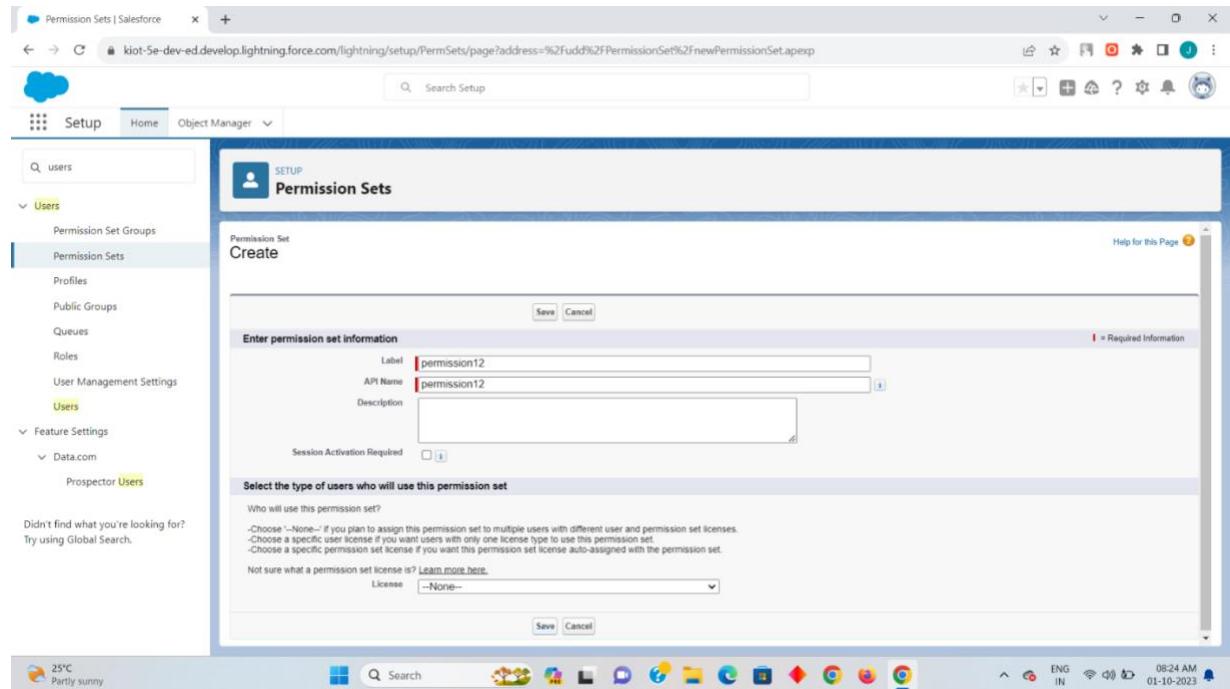
## Step 6:

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.



The screenshot shows the 'Permission Sets' page in the Salesforce Setup. 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 'Action' column contains checkboxes for 'Clone'. The 'Permission Set Label' column lists various roles and profiles. The 'Description' column provides a brief description of each permission set. The 'License' column shows the specific license required for each set. The table is paginated at the bottom, showing page 1 of 2.



The screenshot shows the 'Create Permission Set' page in the Salesforce Setup. The left sidebar is collapsed, and the main content area is titled 'Permission Set Create'. The form has fields for 'Label' (set to 'permission12'), 'API Name' (set to 'permission12'), and 'Description'. Below the form is a section titled 'Select the type of users who will use this permission set'. It includes a note about who will use the permission set and a dropdown for 'License' (set to '-None-'). At the bottom of the page are 'Save' and 'Cancel' buttons.

Permission Sets | Salesforce

Search Setup

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.

25°C Partly sunny

SEARCH

Close Delete Edit Properties Manage Assignments

Video Tutorial | Help for this Page

Permission Set Overview

Description: permission12

License:

Session Activation Required:

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

API Name: permission12

Namespace Prefix:

Created By: Jyoti Deshpande, 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 connector apps are visible in the app menu

Object Settings

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

API Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

API Class Access

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

External Data Source Access

25°C Partly sunny

SEARCH

Close Delete Edit Properties Manage Assignments

Video Tutorial | Help for this Page

Permission Set Overview

Object Settings

Object Name: Account

Object Permissions	Total Fields	Tab Settings
No Access	9	—
No Access	44	—
No Access	—	—
No Access	—	—
No Access	27	—
No Access	14	—
No Access	—	—
No Access	—	—
No Access	3	—
No Access	17	—
—	4	—
No Access	—	—
No Access	—	—
No Access	6	—
No Access	30	—
No Access	18	—

25°C Partly sunny

SEARCH

Close Delete Edit Properties Manage Assignments

Video Tutorial | Help for this Page

Permission Set Overview

Object Settings

Object Name: Account

Object Permissions	Total Fields	Tab Settings
No Access	9	—
No Access	44	—
No Access	—	—
No Access	—	—
No Access	27	—
No Access	14	—
No Access	—	—
No Access	—	—
No Access	3	—
No Access	17	—
—	4	—
No Access	—	—
No Access	—	—
No Access	6	—
No Access	30	—
No Access	18	—

25°C Partly sunny

SEARCH

Close Delete Edit Properties Manage Assignments

Video Tutorial | Help for this Page

Permission Set Overview

Object Settings

Object Name: Account

Accounts

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 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"/>

25°C Partly sunny

Permission Sets | Salesforce

Search Setup

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.

25°C Partly sunny

SEARCH

Close Delete Edit Properties Manage Assignments

Video Tutorial | Help for this Page

Permission Set Overview

Object Settings

Object Name: Account

Object Permissions	Total Fields	Tab Settings
No Access	9	—
No Access	44	—
No Access	—	—
No Access	—	—
No Access	27	—
No Access	14	—
No Access	—	—
No Access	—	—
No Access	3	—
No Access	17	—
—	4	—
No Access	—	—
No Access	—	—
No Access	6	—
No Access	30	—
No Access	18	—

25°C Partly sunny

SEARCH

Close Delete Edit Properties Manage Assignments

Video Tutorial | Help for this Page

Permission Set Overview

Object Settings

Object Name: Account

Object Permissions	Total Fields	Tab Settings
No Access	9	—
No Access	44	—
No Access	—	—
No Access	—	—
No Access	27	—
No Access	14	—
No Access	—	—
No Access	—	—
No Access	3	—
No Access	17	—
—	4	—
No Access	—	—
No Access	—	—
No Access	6	—
No Access	30	—
No Access	18	—

25°C Partly sunny

SEARCH

Close Delete Edit Properties Manage Assignments

Video Tutorial | Help for this Page

Permission Set Overview

Object Settings

Object Name: Account

Accounts

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 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"/>

25°C Partly sunny

Permission Sets | Salesforce

Search Setup

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.

25°C Partly sunny

SEARCH

Close Delete Edit Properties Manage Assignments

Video Tutorial | Help for this Page

Permission Set Overview

Object Settings

Object Name: Account

Accounts

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 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"/>

25°C Partly sunny

SEARCH

Close Delete Edit Properties Manage Assignments

Video Tutorial | Help for this Page

Permission Set Overview

Object Settings

Object Name: Account

Accounts

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"/>

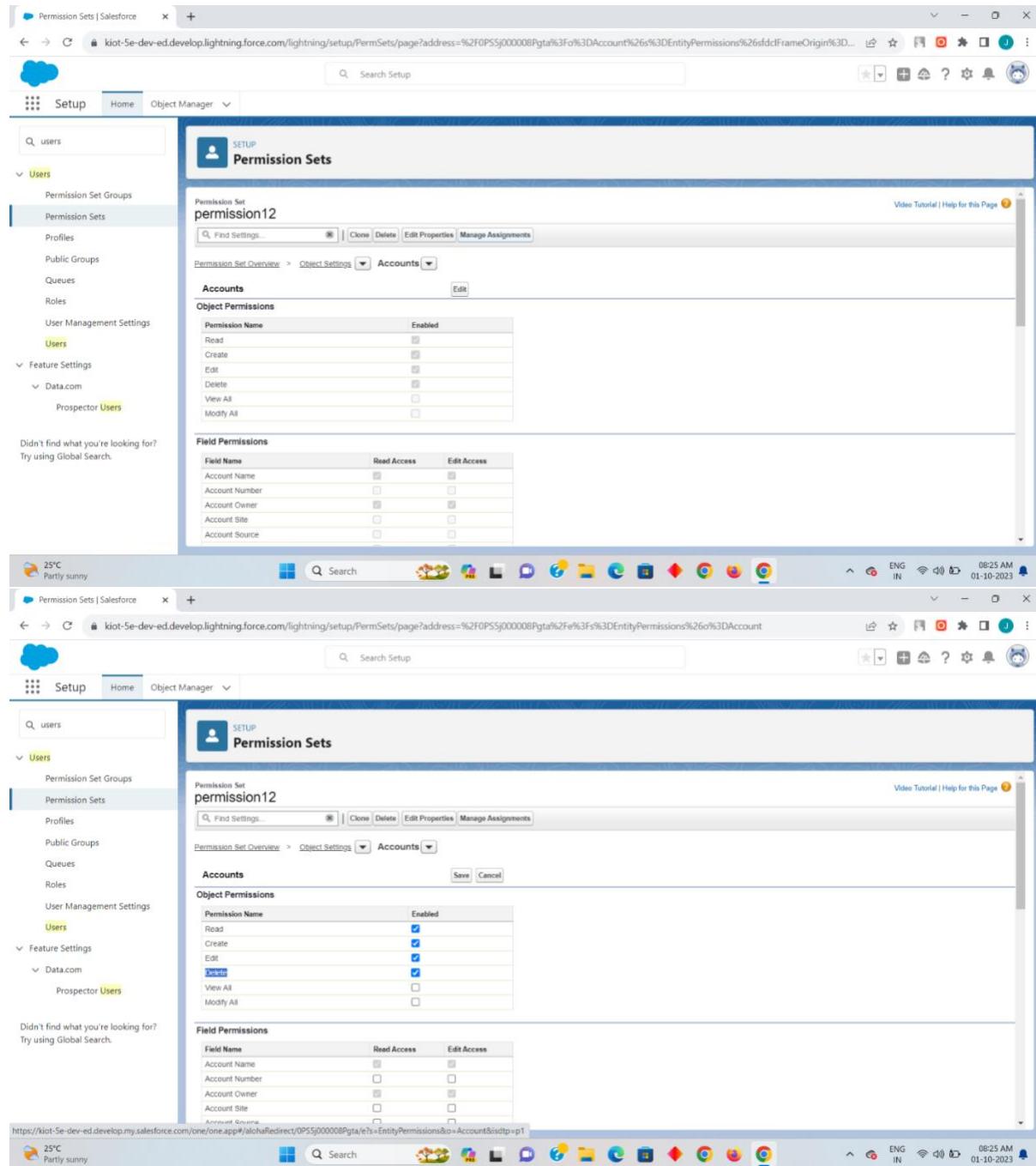
Field Permissions

Field Name	Read Access	Edit Access
Account Name	<input 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"/>

25°C Partly sunny

## 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 screenshot shows the Salesforce 'Permission Sets' page for a permission set named 'permission12'. The 'Accounts' object is selected for configuration. In the 'Object Permissions' section, the 'Edit' permission is checked. In the 'Field Permissions' section, the 'Edit Access' checkboxes are checked for 'Account Name', 'Account Number', 'Account Owner', and 'Account Site'. The 'Read Access' checkboxes are checked for 'Account Name', 'Account Number', 'Account Owner', and 'Account Site'. The 'Modify All' checkbox is checked. The status bar at the bottom indicates the URL: <https://kiot-5e-dev-ed.develop.my.salesforce.com/one/oneapp#/alohaRedirect/0P5j00000Bpgta/e?i=EntityPermissions&o=Account&sidtp=p1>.

## Step 8

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

The screenshots show the Salesforce Setup interface for managing permission sets. The first screenshot shows the 'Current Assignments' page for a permission set named 'permission12', which is empty. The second screenshot shows the 'Select Users to Assign' page, where a user named 'jagadesh' is selected. A tooltip indicates that 'Role, Alias, and Profile aren't searchable. Use filters or sort on these fields instead.' The third screenshot shows the same 'Select Users to Assign' page with the user 'jagadesh' selected, ready to be assigned.

**Screenshot 1: Current Assignments**

No assignments defined.

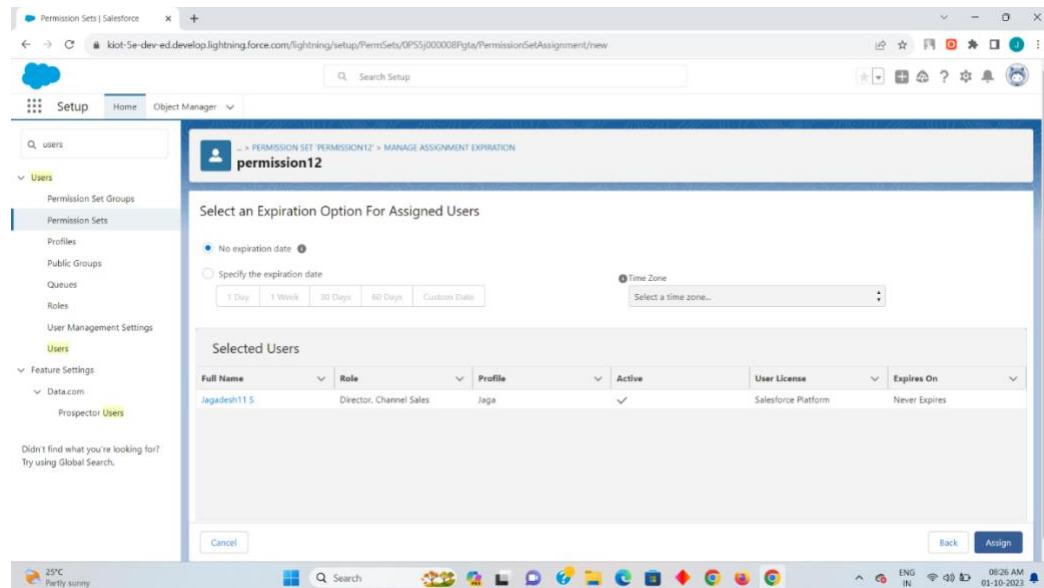
**Screenshot 2: Select Users to Assign**

Full Name	Alias	Username	Role	Active	Profile
jagadesh S	JS	w0e@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
jagadesh S	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
jagadesh11 S	JS	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
jagadesh22 S	JS	jaat1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

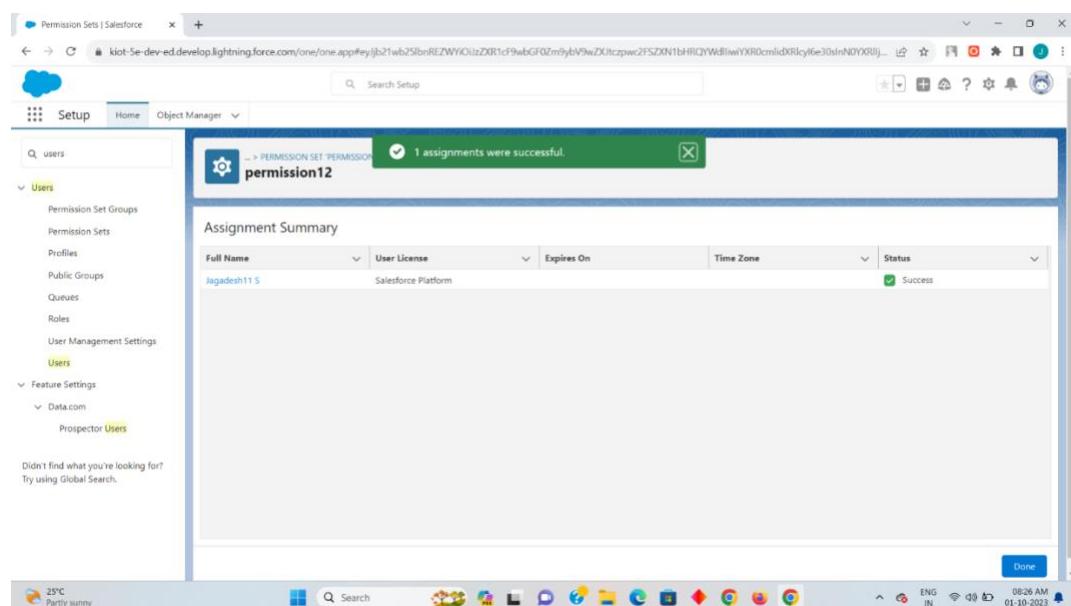
**Screenshot 3: Select Users to Assign**

Full Name	Alias	Username	Role	Active	Profile
jagadesh S	JS	w0e@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
Jagadesh S	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/> Jagadesh11 S	JS	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
jagadesh22 S	JS	jaat1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

Click on next.



Now click on Assign.



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

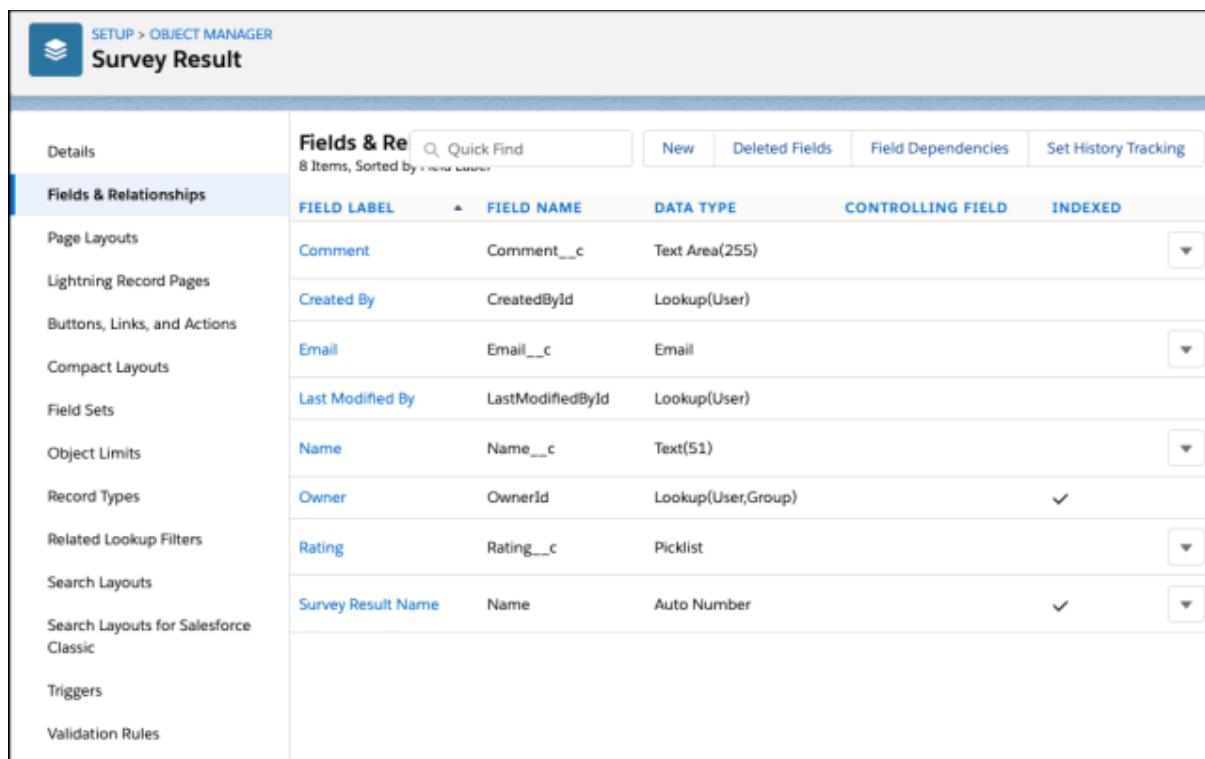
#### 4.Create a screen flow for a basic survey to fill in the details for any form.

##### Solution:

###### Step 1: Create a Custom Object

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

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

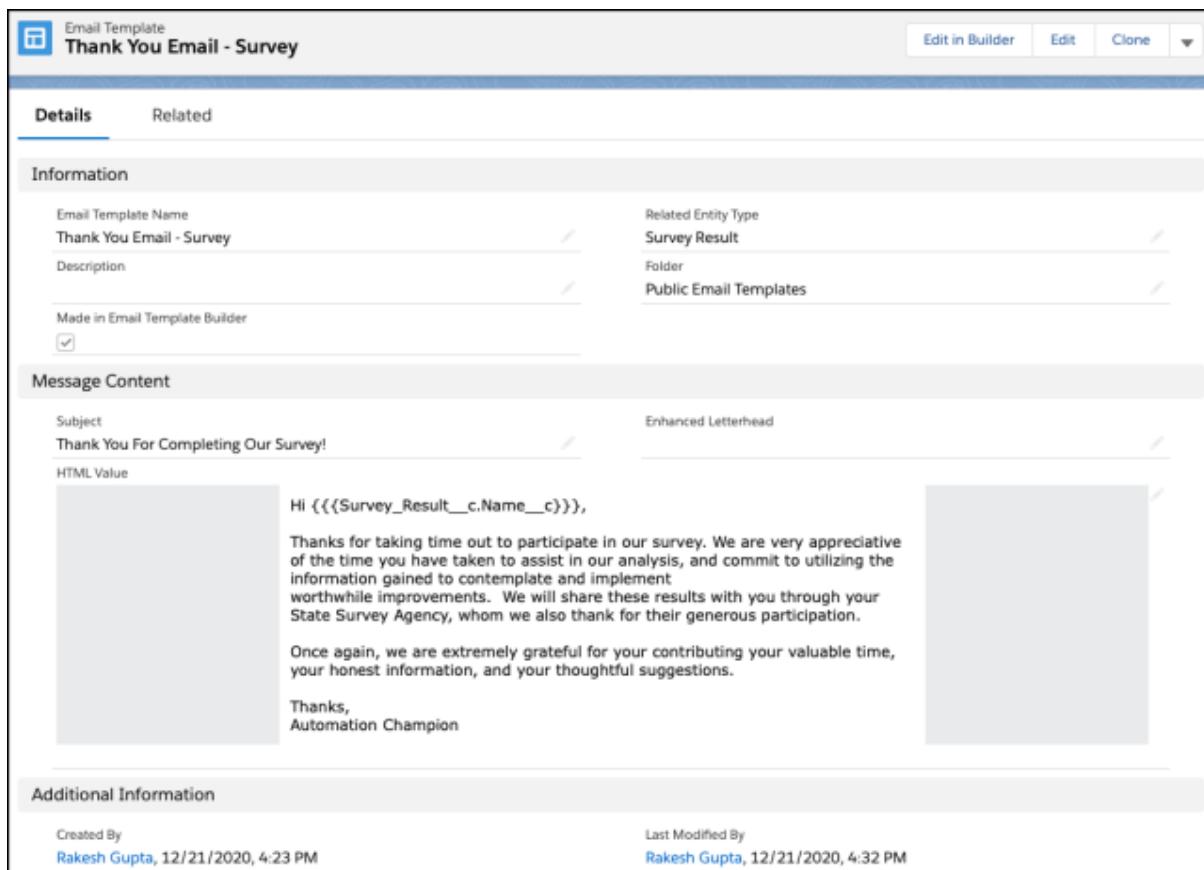


The screenshot shows the Salesforce Object Manager interface for the 'Survey Result' custom object. The top navigation bar includes 'SETUP > OBJECT MANAGER' and the object name 'Survey Result'. The main area is titled 'Fields & Relationships' and displays a table of fields. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The fields listed are:

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

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

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



The screenshot shows the 'Email Template' page in Salesforce. The title is 'Email Template Thank You Email - Survey'. The 'Details' tab is selected. In the 'Information' section, the 'Email Template Name' is 'Thank You Email - Survey', 'Related Entity Type' is 'Survey Result', 'Folder' is 'Public Email Templates', and 'Made in Email Template Builder' has a checked checkbox. The 'Message Content' section shows the subject 'Thank You For Completing Our Survey!' and the HTML Value:

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

The 'Additional Information' section shows 'Created By' as 'Rakesh Gupta, 12/21/2020, 4:23 PM' and 'Last Modified By' as '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**.

Help for this Page [?](#)

**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**

**Edit Email Alert**

Description: Survey - Thank You Email

Unique Name: Survey\_Thank\_You\_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for:

Recipients

Available Recipients	Selected Recipients
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email
<input type="button" value="Add"/>	<input type="button" value="Remove"/>

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

Additional Emails:

From Email Address: Current User's email address

Make this address the default From email address for this object's email alerts. [?](#)

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

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

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

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

2. Click **Add Row**
  3. Row 2:
    1. **Field: Email\_\_c**
    2. **Value: {!Email.value}**
  4. Click **Add Row**
  5. Row 3:
    1. **Field: Name\_\_c**
    2. **Value: {!Name.firstName} {!Name.lastName}**
  6. Click **Add Row**
  7. Row 3:
    1. **Field: Rating\_\_c**
    2. **Value: {!Rating}**
7. Click **Done**.

Edit Create Records

Create Salesforce records using values from the flow.

\*Label  \*API Name

Description

How Many Records to Create  
 One  
 Multiple

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

Create a Record of This Object  
\*Object

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text" value="Aa Comment"/> <input type="button" value="X"/> <input type="button" value="Delete"/>
Email__c	<input type="text" value="Aa Email &gt; Value"/> <input type="button" value="X"/> <input type="button" value="Delete"/>
Name__c	<input type="text" value="(!Name.firstName) {!Name.lastName}"/> <input type="button" value="X"/> <input type="button" value="Delete"/>
Rating__c	<input type="text" value="Aa Rating"/> <input type="button" value="X"/> <input type="button" value="Delete"/>

Manually assign variables

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

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

1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.
4. Clicks on the **Survey – Thank You Email** email alert.
5. Click **Done**.

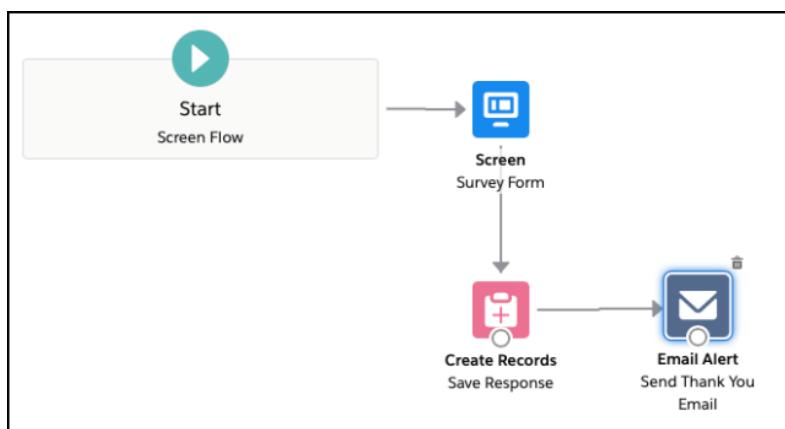
Edit "Survey - Thank You Email" email alert

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	
<pre>-----</pre>	
Set Input Values	
A_a * 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 [?](#)

Insert a resource...



Survey {!\$Flow.CurrentDateTime}

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

2

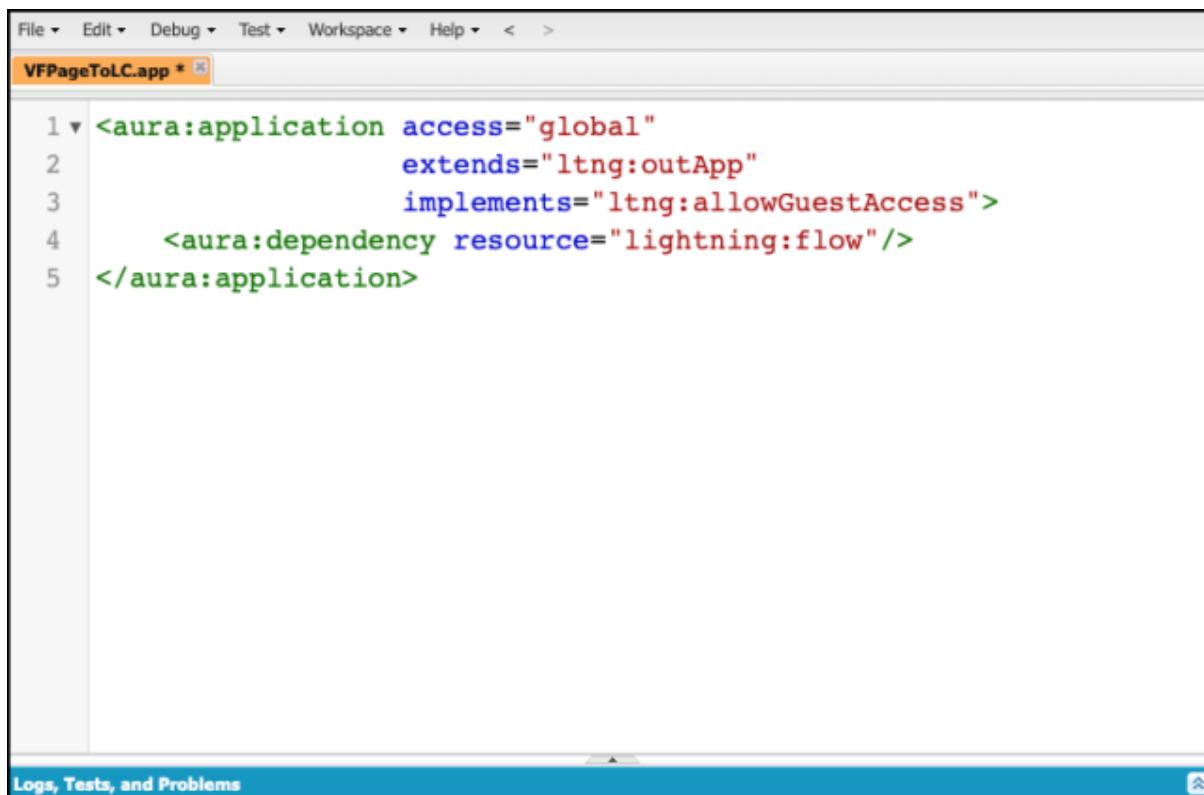
[Cancel](#)

[Save](#)

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

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

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



```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
VFPPageToLC.app *
1 <aura:application access="global"
2           extends="ltng:outApp"
3           implements="ltng:allowGuestAccess">
4     <aura:dependency resource="lightning:flow"/>
5 </aura:application>
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()** Click **Setup**.

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

```

1 <apex:page showheader="false" lightningStylesheets="true">
2 <html>
3   <head>
4     <apex:includeLightning />
5     <!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualf
6   </head>
7   <body class="slds-scope">
8     <div id="flowContainer" />
9     <script>
10
11       var statusChange = function (event) {
12         if(event.getParam("status") === "FINISHED") {
13           var outputVariables = event.getParam("outputVariables");
14           var key;
15           for(key in outputVariables) {
16             if(outputVariables[key].name === "myOutput") {
17               ...
18             }
19           }
20         };
21         $Lightning.use("c:VFPageToLC", function() {
22           $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
23             "flowContainer",
24             function (component) {
25               component.startFlow("Survey");
26             }
27           );
28         });
29       </script>
30     </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 Label	Survey
Site Name	Survey
Site Description	
Site Contact	Rakesh Gupta
Default Record Owner	Rakesh Gupta
Default Web Address	http://katihar-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	
Site Favorite Icon	
Analytics Tracking Code	
URL Rewriter Class	
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

Sinhal

\* Email

Redacted

\* Rating

5

\* Comment

Awesome Blog

Next

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

