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**Salesforce Developer(Course)**  
**Assignment no 1**

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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 Salesforce Setup interface with the following details:

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** Shows "Setup" > "Object Manager".
- Page Title:** "New Custom Object" under the "SETUP" tab.
- Section: Custom Object Definition Edit**
  - Custom Object Information:**
    - The singular and plural labels are used in tabs, page layouts, and reports.
    - Label:** college (Example: Account)
    - Plural Label:** colleges (Example: Accounts)
    - Starts with vowel sound:**
  - The Object Name is used when referencing the object via the API.
  - Object Name:** college (Example: Account)
  - Description:** (Empty text area)
  - Context-Sensitive Help Setting:**
    - Open the standard Salesforce.com Help & Training window
    - Open a window using a Visualforce page
  - Content Name:** None
- Section: 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
- Section: Optional Features**
  - Allow Reports
  - Allow Activities
  - Track Field History
  - Allow in Chatter Groups
  - Enable Licensing
- Section: 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
- Section: Deployment Status**
  - In Development
  - Deployed
- Section: Search Status**
  - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).
  - Allow Search
- Section: 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

At the bottom right of the form are three buttons: "Save", "Save & New", and "Cancel".

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A message at the top indicates that permissions for the new object are disabled by default. The 'Custom Object Definition Edit' screen is displayed, with the 'Label' field set to 'department' and the 'Plural Label' field set to 'departments'. The 'Object Name' field also contains 'department'. Other fields like 'Description' and 'Content Name' are left blank. The 'Optional Features' section includes checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Object Classification' section has checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access', all of which are checked. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has the 'Allow Search' checkbox unchecked. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

## 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.

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

**Details**

Fields & Relationships	Description
Page Layouts	API Name
Lightning Record Pages	CDepartment__c
Buttons, Links, and Actions	Custom
Compact Layouts	✓
Field Sets	Singular Label
Object Limits	CDepartment
Record Types	Plural Label
Related Lookup Filters	CDepartments
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	

Edit Delete

Cloud icon

Setup Home Object Manager

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

Help for this Page Step 3 of 6 Previous Next Cancel

Field Label: college

Field Name: college

Description:

Help Text:

Child Relationship Name: CDepartments

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records:  
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.  
 Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

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

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

Lookup Filter

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "CDepartment New Relationship" and is on "Step 2. Choose the related object". It shows a dropdown menu set to "college". Navigation buttons at the bottom include "Previous", "Next", and "Cancel".

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup categories. The main area is titled "CDepartment New Custom Field" and is on "Step 1. Choose the field type". It shows a list of data types: None Selected, Auto Number, Formula, Roll-Up Summary, Lookup Relationship, Master-Detail Relationship, and External Lookup Relationship. The "Master-Detail Relationship" option is selected. A detailed description of this type is provided, mentioning it creates a relationship between the current object and another object, and includes notes about required fields and roll-up summary fields. Navigation buttons at the bottom include "Next" and "Cancel".

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

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

1. Still on the "College\_c" settings, go to "Fields & Relationships."

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

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

- Setup** icon in the top left.
- Search Bar**: Search Setup
- Header**: SETUP > OBJECT MANAGER CDepartment
- Left Sidebar (Fields & Relationships)**:
  - Details
  - 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
- Table View (Fields & Relationships)**:
 

Fields & Relationships		4 Items, Sorted by Field Label	Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED			
college	college__c	Master-Detail(college)		✓			
Created By	CreatedById	Lookup(User)					
Department Name	Name	Text(80)		✓			
Last Modified By	LastModifiedById	Lookup(User)					

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. Below the navigation, there's a sidebar with a search field 'Q\_ tabs' and sections for 'User Interface' (including 'Rename Tabs and Labels' and 'Tabs'), and a message 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section has a 'New' button and a 'What Is This?' link. Under 'Custom Object Tabs', there is a table:

Action	Label	Tab Style	Description
Edit   Del	Book1	Box	
Edit   Del	Research Proposal	Square	
Edit   Del	student	Box	

The screenshot shows the Salesforce Setup interface under the 'OBJECT MANAGER' section for the object 'college'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'colle'. The main content area is titled 'New Custom Field' and is currently on 'Step 5. Add to page layouts'. On the left, there's a sidebar with various options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The 'Fields & Relationships' section is selected. The main form shows the configuration for a new custom field:

**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.

At the bottom right, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

**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"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Ann Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Help for this Page

Previous Next Cancel

**college** New Custom Field

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

Select Object to Summarize  
Master Object: college  
Summarized Object: CDDepartments

Select Roll-Up Type  
COUNT (radio button selected)  
SUM  
MIN  
MAX  
Field to Aggregate: None

Filter Criteria  
All records should be included in the calculation (radio button selected)  
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

**New Custom Field**

**Step 2. Enter the details**

**Step 2 of 5**

Field Label:  [?](#)

Field Name:  [?](#)

Description:

Help Text:

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

**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**

**Step 1**

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

**Data Type**

None Selected Select one of the data types below

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

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

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

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

Master-Detail Relationship Creates a master-detail relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 

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

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

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

**Next** **Cancel**

The screenshot shows the Salesforce Object Manager interface. At the top, there are navigation links: Setup, Home, and Object Manager (with a dropdown arrow). A search bar contains the text 'college'. On the right side of the header are various icons for account management and help.

The main content area is titled 'college' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists several configuration options: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The 'Fields & Relationships' option is selected.

The central part of the screen displays a table titled 'Fields & Relationships' with 4 items. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

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

## Step 4: Create a Lightning App

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

## 10. Assign the app to users or profiles.

## 11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main title is 'New Custom Object Tab'. A sub-header indicates 'Step 2. Add to Profiles'. The page instructs the user to choose user profiles for which the new custom tab will be available. It offers two options: 'Apply one tab visibility to all profiles [Default On]' (selected) and 'Apply a different tab visibility for each profile'. A list of user profiles is provided on the left, and a grid of dropdown menus on the right allows setting visibility for each profile. The profiles listed include: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Cloud Kicks Admin, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, customer, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, Customer Portal Manager Custom, Customer Portal Manager Standard, External Apps Login User, External Identity User, Force.com - App Subscription User, Force.com - Free User, Gold Partner User, High Volume Customer Portal, High Volume Customer Portal User, Identity User, Manager, Marketing User, Minimum Access - Salesforce, Partner App Subscription User, Partner Community Login User, Partner Community User, Read Only, Research Manager, Research Users, Salesforce API Only System Integrations, Sales User, security profile, Silver Partner User, Solution Manager, Standard Platform User, Standard User, and System Administrator. The 'Tab Visibility' column contains dropdown menus for each profile, all currently set to 'Default On'. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main content area is titled 'New Custom Object Tab' and is divided into three steps. Step 1, 'Enter the Details', is currently active. It allows users to select an existing custom object or create a new one. The 'Object' dropdown is set to 'college', and the 'Tab Style' is 'Jewel'. A note indicates that a splash page can be chosen for the first time users click on the tab. Step 2, 'Customize the Tab', is partially visible below. At the bottom right of the main form, there are 'Next' and 'Cancel' buttons.

The screenshot shows the 'Tabs' configuration page continuing from the previous step. Step 3, 'Add to Custom Apps', is displayed. It lists various standard and custom apps available for adding the new tab. Each app has a checkbox labeled 'Include Tab', which is checked for all listed items. A note at the top states that the new tab will be available for these apps. At the bottom right, there are 'Previous', 'Save', and 'Cancel' buttons.

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	

**New Custom Object Tab**

Step 1. Enter the Details Step 1 of 3

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

Object	CDepartment
Tab Style	Lightning

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

Splash Page Custom Link	-None-
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Enter a short description

Description

[Next](#) [Cancel](#)

**Lightning Experience App Manager**

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	▼

[New Lightning App](#) [New Connected App](#)

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

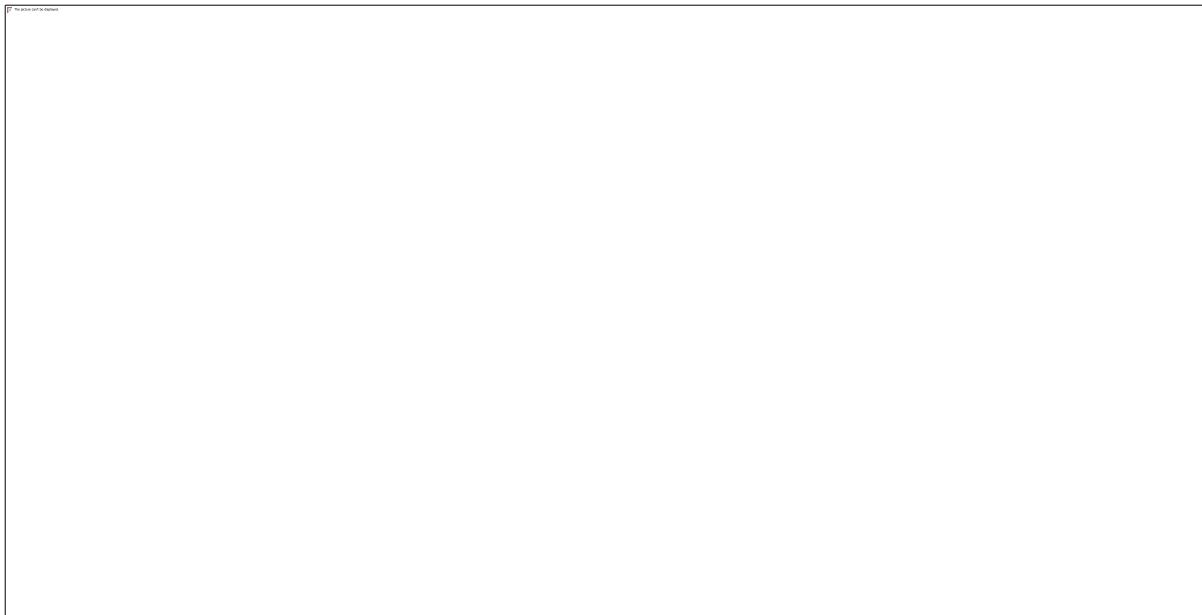
- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Left Sidebar:** A sidebar titled "Setup" with a "User Interface" section containing "Rename Tabs and Labels" and "Tabs". It also includes a search bar and a message: "Didn't find what you're looking for? Try using Global Search."
- Main Content Area:** Titled "Tabs" under "SETUP".
  - Custom Tabs:** A section with a table titled "Custom Object Tabs".

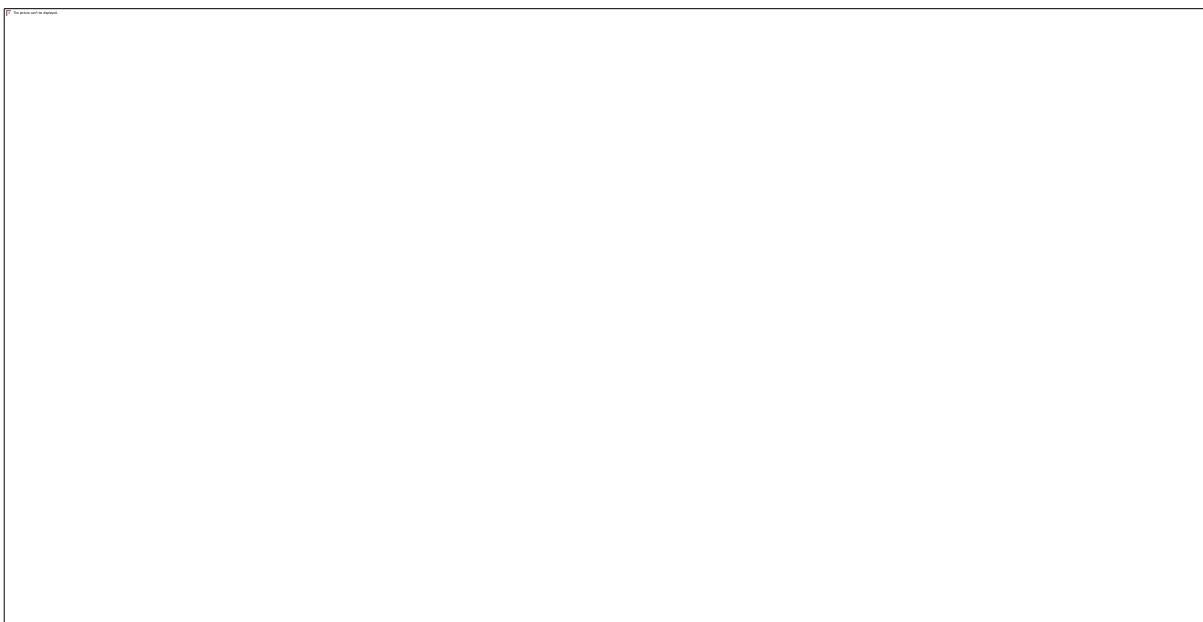
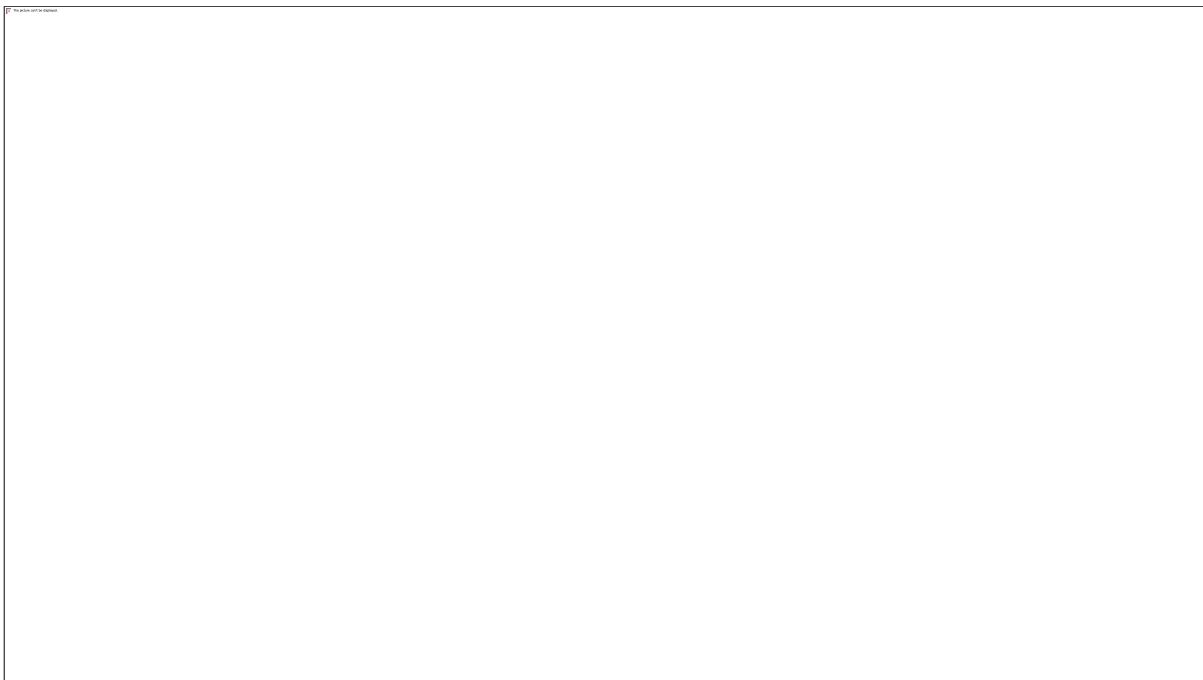
Action	Label	Tab Style	Description
Edit   Del	Book1	Box	
Edit   Del	Departments	Lightning	
Edit   Del	colleges	Jewel	
Edit   Del	Research_Proposal	Square	
Edit   Del	student	Box	
  - Web Tabs:** A section stating "No Web Tabs have been defined".
  - Visualforce Tabs:** A section stating "No Visualforce Tabs have been defined".
  - Lightning Component Tabs:** A section stating "No Lightning component tabs have been defined".
  - Lightning Page Tabs:** A section stating "No Lightning Page Tabs have been defined".

## **Conclusion:**

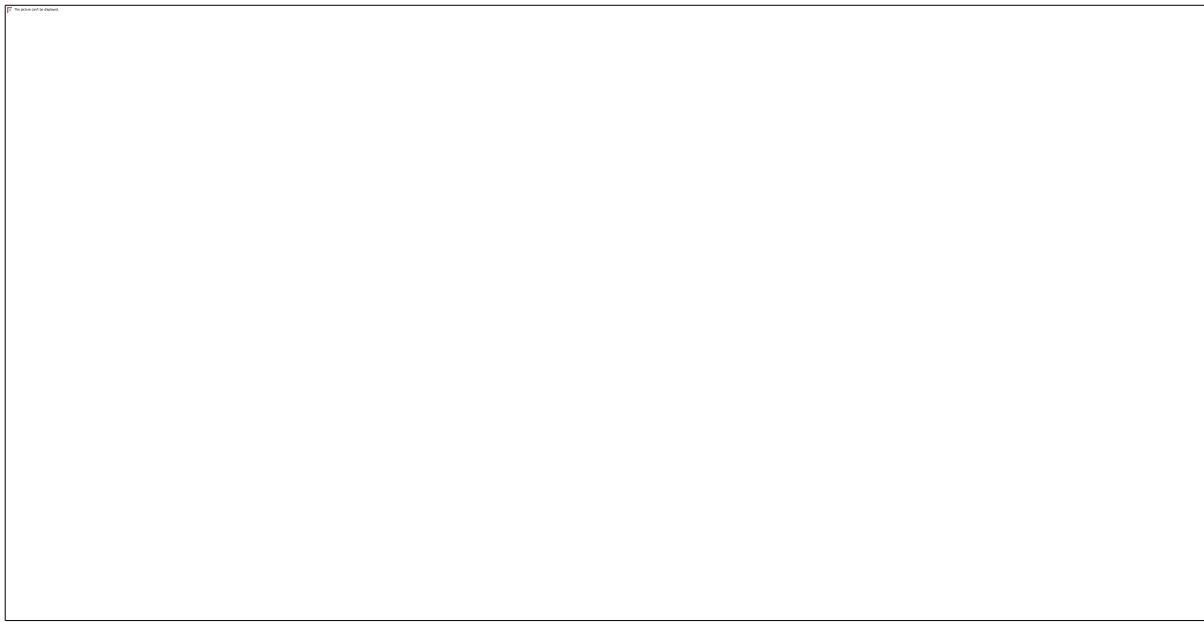
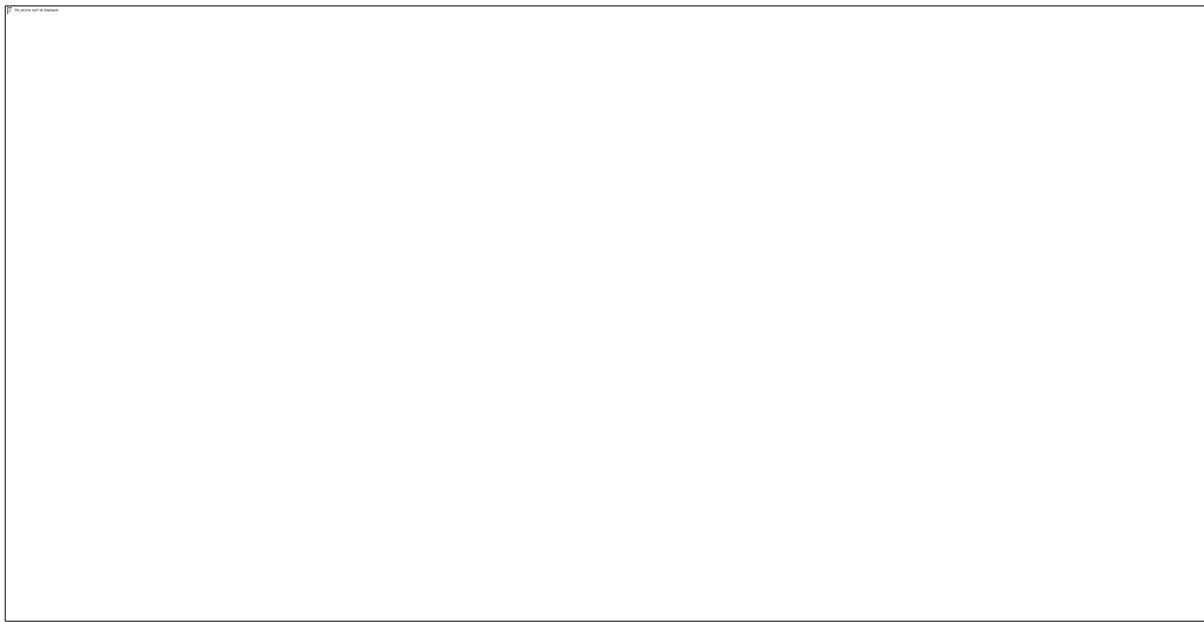
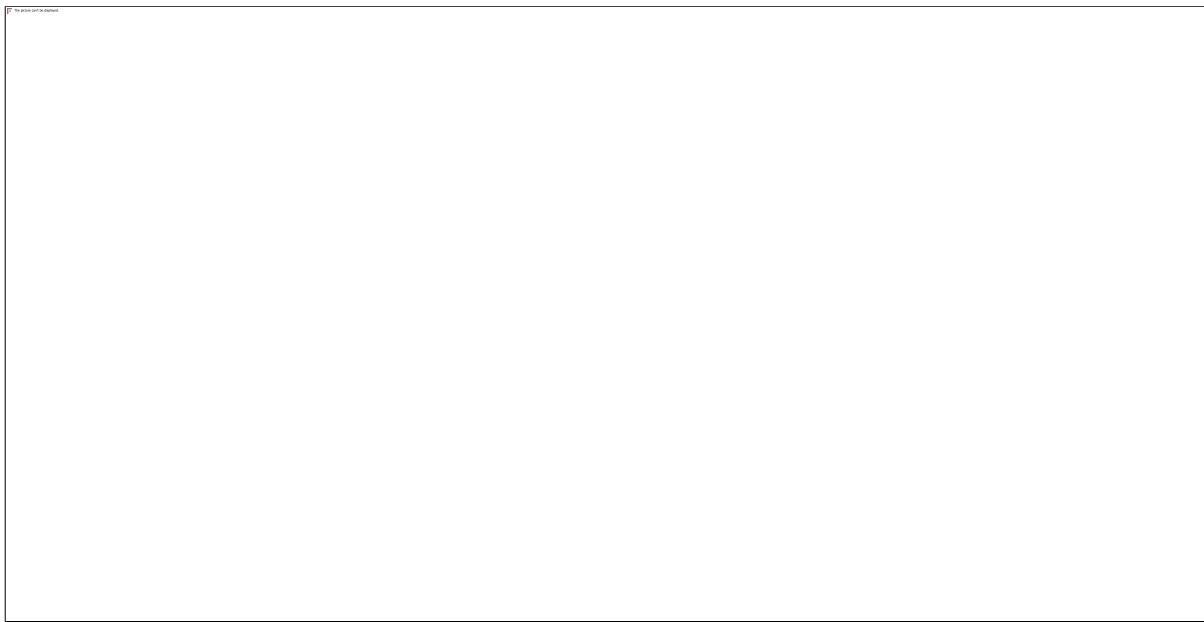
**Now, whenever you create or update a record in the "Department\_c" related to a "College\_c," the "TotalCount\_c" field on the "College\_c" will automatically update to show the total number of related records.**

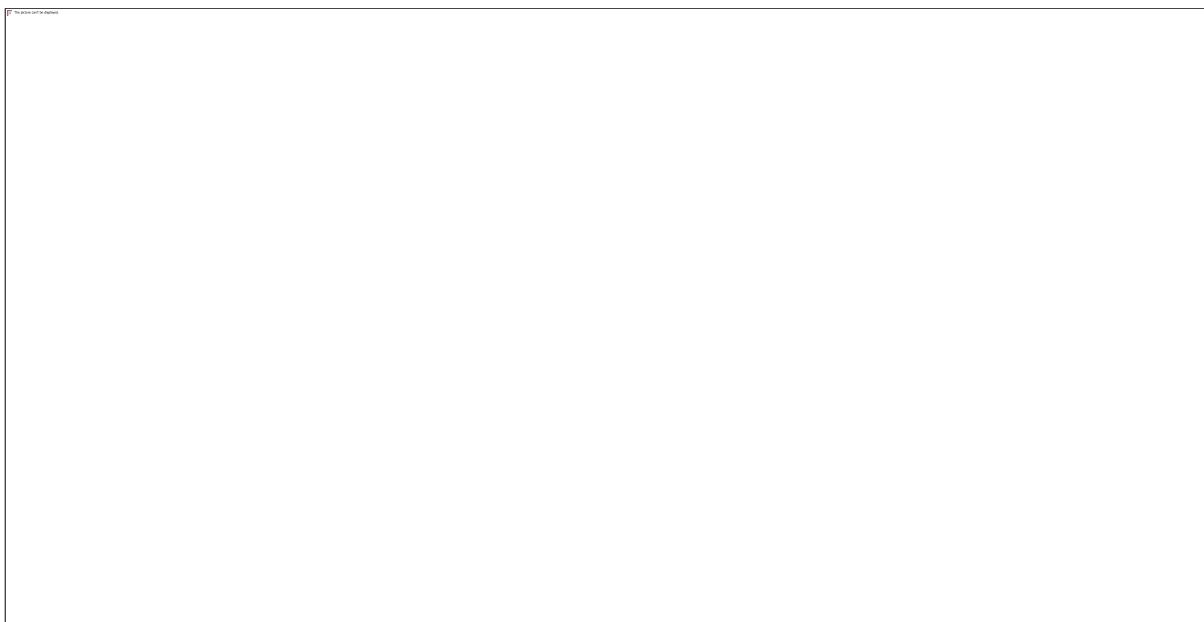
**Remember to adjust field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your organization's requirements.**











MECW

My college colleges CDdepartments student Content

Search... ★ + ? ☰

college mecw New Contact Edit New Opportunity ▾

**Related Details**

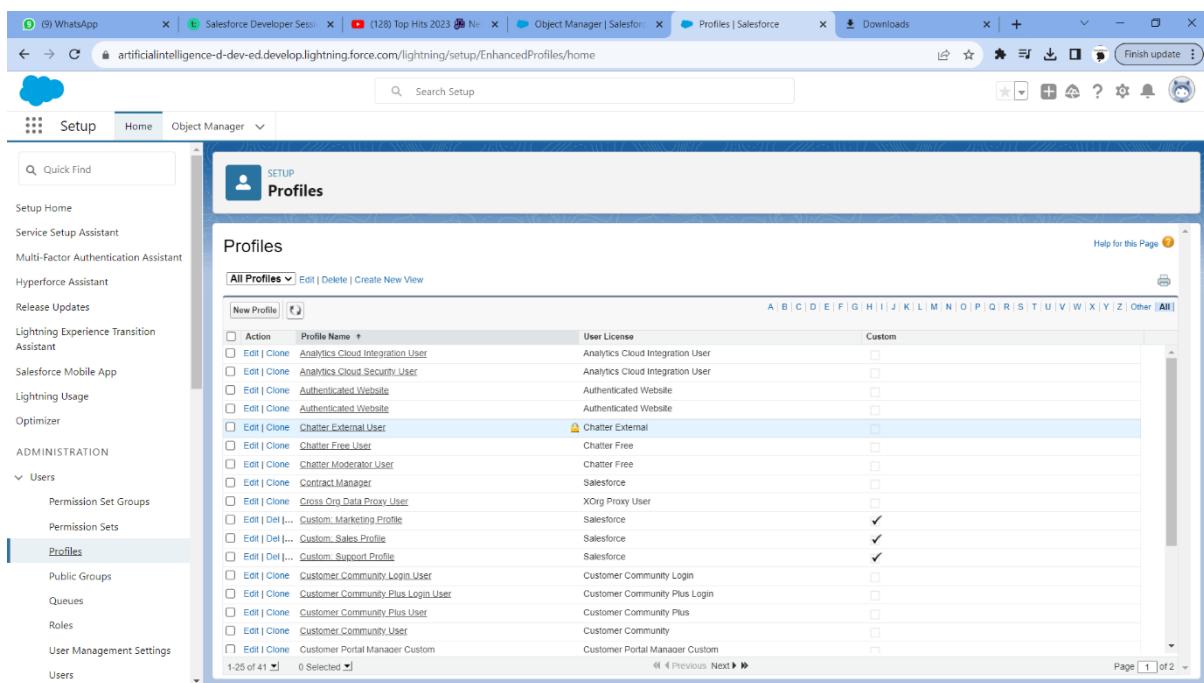
college Name	mecw	Owner	krishna s
Total count	2		
phone	9087116402		
Email	kiot@gmail.com		
Location	90, 80		
Created By	krishna s, 01/10/2023, 11:16 am	Last Modified By	krishna s, 01/10/2023, 11:19 am

History

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main area displays a table of profiles, each with columns for Action, Profile Name, User License, and Custom status. The 'Custom' column contains checkboxes, many of which are checked for certain profiles. The table includes rows for standard profiles like 'Analytics Cloud Integration User', 'Authenticated Website', and various Chatter and Customer Community profiles, as well as several custom profiles like 'Custom: Marketing Profile', 'Custom: Sales Profile', and 'Customer Portal Manager Custom'. The left sidebar shows the navigation menu under 'ADMINISTRATION' with 'Users' expanded, and the 'Profiles' section is highlighted.

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

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes options like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users (with sub-options: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users). The main content area displays a table titled "Profiles" with columns: Action, Profile Name, User License, and Custom. The table lists various profiles such as "Salesforce API Only System Integrations", "salesmanager", "Silver Partner User", "Solution Manager", "Standard Platform User", "Standard User", and "System Administrator". A navigation bar at the bottom indicates "1 of 7" and "0 Selected".

The screenshot shows the "Clone Profile" dialog box. The left sidebar is identical to the previous screenshot. The main content area has a header "Clone Profile" and a sub-header "Enter the name of the new profile." Below this, a message states "You must select an existing profile to clone from." It shows a table with columns: Existing Profile, User License, and Profile Name. Under "Existing Profile", it lists "Standard Platform User". Under "User License", it lists "Salesforce Platform". Under "Profile Name", there is a text input field containing a redacted value. At the bottom of the dialog are "Save" and "Cancel" buttons.

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

## Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page

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

SETUP Home Object Manager

Quick Find Search Setup

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

## Manager

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

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

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

**Profile Detail**

Name	Manager
User License	Salesforce Platform
Description	
Created By	GOPAL S. 01/10/2023, 7:09 pm
Modified By	GOPAL 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	No Assigned [View Assignment]	Order Product [View Assignment]
Account	Home Page Default [View Assignment]	Payment [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Payment Authorization [View Assignment]
Appointment Invitation	Alternative Payment Method Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]
Asset	Appointment Invitation Layout [View Assignment]	Payment Gateway [View Assignment]
	Asset Layout [View Assignment]	

Help for this Page

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

SETUP Home Object Manager

Quick Find Search Setup

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | 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

Manager

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	Manager	User License	Salesforce Platform	Description	Custom Profile
Analytics Studio (standard__Insights)	<input type="radio"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	Visible	Default
App Launcher (standard__AppLauncher)	<input type="radio"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="radio"/>	<input checked="" type="radio"/>
slot (slot)	<input checked="" type="radio"/>	<input type="radio"/>			

**Custom App Settings**

Visible	Default
Analytics Studio (standard__Insights)	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="radio"/>
slot (slot)	<input checked="" type="radio"/>

**Service Provider Access**

Tab Settings

Overwrite users' personal tab customizations

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

Custom Object Permissions

Object	Basic Access	Data Administration
Bank	Read Create Edit Delete View All Modify All	
customers	Read Create Edit Delete View All Modify All	

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Custom Object Permissions

Object	Basic Access	Data Administration
Enhancement Requests	Read Create Edit Delete View All Modify All	

Custom Object Permissions

Object	Basic Access	Data Administration
User External Credentials	Read Create Edit Delete View All Modify All	

Communication Subscription Channel Types

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

Custom Object Permissions

Object	Basic Access	Data Administration
Individuals	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>	<input type="checkbox"/>
Party Consents	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

Object	Basic Access	Data Administration
Individuals	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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Party Consents	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>

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Custom Object Permissions

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User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

Object	Basic Access	Data Administration</th
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The screenshot shows the Salesforce Setup interface with the following details:

- Left Navigation Bar:** Includes links for 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 sections for Administration, Users, Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, and Users.
- Header:** Displays tabs for WhatsApp, SalesForce Developer Session, Top Hits 2023, Object Manager | Salesfo..., Profiles | Salesfor..., and Downloads. The URL is <https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2Fe%3Fr?url%3D%25F00e5j0...>.
- Search Bar:** A search bar labeled "Search Setup" with a magnifying glass icon.
- Main Content Area:** The "Profiles" setup page.
  - Custom Object Permissions:** Shows permissions for Contact Point Addresses, Contact Point Consents, Contact Point Emails, Sellers, Streaming Channels, and User External Credentials across various objects like Bank and customers.
  - Session Settings:** Allows setting session times out after 2 hours of inactivity and specifying session security levels required at login.
  - Password Policies:** Configures password expiration (90 days), history (3 passwords remembered), minimum length (8), complexity requirements (must include alpha and numeric characters), question requirements (cannot contain password), maximum invalid attempts (10), and lockout effective period (15 minutes).

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQbz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

**Custom Object Permissions**

	Bank	customers	Enhancement Requests									
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Basic Access	<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
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obfuscate secret answer for password resets
- Require a minimum 1 day password lifetime
- Don't immediately expire links in forgot password emails

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

**All Users**

This page allows you to 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
<input type="checkbox"/>   Edit   Login	Adriana_Diva	dadan	test_diva_pas_4wbyt6wtk_tszgrgshkpx_3qj8cfoyzwms_h43hkzw6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JMS User
<input type="checkbox"/>   Edit	Chatter_Expert	Chatter	chatty_00d500000bcsskeab_l0hfwmgnote@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit   Login	Ellington_Amelia	aell	amelia.ellington.146kxc95000jh_d6cwyodcu04wh_hnbdwmyvhho_wguctor1dalv@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	S_GCPA	GS	kot520@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	User_Integration	integ	integration@00d500000bcsskeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@00d500000bcsskeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Developer Session | Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: [ ] Role: <None Specified>

Last Name: [ ] User License: Salesforce Integration

Alias: [ ] Profile: Salesforce API Only System Integrations

Email: [ ] Active:

Username: [ ] Marketing User:

Nickname: [ ] Offline User:

Title: [ ] Knowledge User:

Company: [ ] Flow User:

Department: [ ] Service Cloud User:

Division: [ ] Site.com Contributor User:

Data.com User Type: [ ] Site.com Publisher User:

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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 PLATFROM TOOLS > Apps Feature Requests

Salesforce Developer Session | Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmiya Role: <None Specified>

Last Name: balaji User License: Salesforce Platform

Alias: sbala Profile: Manager

Email: 2k20ose179@kiot.ac.in Active:

Username: 2k21it@kiot.ac.in Marketing User:

Nickname: User169616771282564526 Offline User:

Title: worker Knowledge User:

Company: kiot bank Flow User:

Department:

Division:

Data.com User Type: [ ] Service Cloud User:

Data.com Monthly Addition Limit: Default Limit (300) Site.com Contributor User:

Accessibility Mode (Classic Only):  Site.com Publisher User:

High-Contrast Palette on Charts:  WDC User:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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 PLATFROM TOOLS > Apps Feature Requests

User Sowmya bala

User Detail

Name	sowmya bala	Role	Salesforce Platform
Alias	sbala	User License	Manager
Email	2k20case179@kiot.ac.in [Verify]	Profile	Active <input checked="" type="checkbox"/>
Username	2k21it@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User16961677128256452616	Offline User	<input type="checkbox"/>
Title	worker	Knowledge User	<input type="checkbox"/>
Company	kiot bank	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Sites.com Contributor User	<input type="checkbox"/>
Address		Sites.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input checked="" type="checkbox"/>
Language	English	Data.com User Type	<input type="checkbox"/>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>

Welcome to Sales!

Click below to verify your account.

Verify Account

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

Username:  
2k21it@kiot.ac.in

Again, welcome to Salesforce!

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(9) WhatsApp x | (1) Salesforce Dev x | (128) Top Hit x | Object Manager x | Users | Sales x | Downloads x | Welcome to x | Recently Viewed x | Change Your x + - \_ Finish update

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

**salesforce**

### Change Your Password

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

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

\* New Password

..... Good

\* Confirm New Password

..... Match

Security Question

In what city were you born?

\* Answer

salem

Change Password

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

Login | Salesforce x +

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

**salesforce**

Username  
2k21it@kiot.ac.in

Password  
.....

Log In

Remember me

Forgot Your Password?

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

WATCH ON DEMAND

AIDay

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Recently Viewed | Bank | Salesfo... +

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

MECW

mecw Bank customers Home

Bank Recently Viewed

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

Bank Name ↓

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

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

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic

Add Username

New Bank | Salesforce +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank\_\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=16...

mecw Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

\* = Required Information

Information

\*Bank Name: boi

Owner: sowmiya bala

phoneno: 0897754534

Cancel Save & New Save

The screenshot displays two screenshots of the Salesforce Lightning Experience interface.

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

**Bottom Screenshot:** The customer record has been successfully created. A green banner at the top right of the page states "customer 'madhu' was created." The record details are shown in the "Details" tab, including the customer name "madhu", bank "boi", and the creation information: "Created By" (sowmiya bala) and "Last Modified By" (sowmiya bala). Navigation buttons "New Contact", "Edit", and "Delete" are visible on the right.

Salesforce Developer Session 2 | 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

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

Action	Profile Name *	User License	Custom
<input type="checkbox"/>	Edit   Clone: Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Delete: 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"/>

1.7 of 7 0 Selected | Page 1 of 1

Salesforce Developer Session 2 | 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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. \* = Required Information

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

Save Cancel

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your setup...

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 salesmanage

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

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

Log In IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

**Profile Detail**

Name	salesmanage	User License	Salesforce Platform	Description	Created By	Modified By
					GOPALS_ 01/10/2023, 7:19 pm	GOPALS_ 01/10/2023, 7:19 pm

**Page Layouts**

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

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your setup...

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 Edit salesmanage

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	salesmanage	User License	Salesforce Platform	Description	Custom Profile
					✓

**Custom App Settings**

Visible	Default	Visible	Default
<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>
<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

**Standard Tab Settings**

Home	Default On
Accounts	Learning

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your setup

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	Create	Edit	Delete	Data Administration	Basic Access	Create	Edit	Data Administration	
	Read	Read	Create	Edit	View All	Modify All	Read	Read	View All	Modify All
Contact Point Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enhancement Requests	<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
Obfuscate secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your setup

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	Create	Edit	Delete	Data Administration	Basic Access	Create	Edit	Data Administration	
	Read	Read	Create	Edit	View All	Modify All	Read	Read	View All	Modify All
Contact Point Emails	<input checked="" type="checkbox"/>									
User External Credentials	<input type="checkbox"/>									
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enhancement Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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
Obfuscate secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

Save | Save & New | Cancel

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

User Management Settings

New User

User Edit

General Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

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

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit

General Information

First Name: madhu

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:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

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

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

Search Setup

Users

Mailing Address

Street: 4/194, ariyampalayam, utthamasolapuram ..  
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 Po... | Users | Salesforce | Welcome to Salesforce: Verify yo... | + | Finish update

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

Search Setup

Users

Mailing Address

Street: 4/194, ariyampalayam, utthamasolapuram ..  
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

Screenshot of the Salesforce Developer Session 2 interface showing the User Management Settings for a user named "madhu b".

**User Detail:**

- Name: madhu b
- Alias: mb
- Email: 2k20csit79@kiot.ac.in [Verify]
- Username: 2k20csit@kiot.ac.in
- Nickname: User16961684242855419206
- Title: worker
- Company: kiot bank
- Department: Sales
- Division: Address: 41/94, aryanpalayam, uhamasolapuram .., Paraikkadu , salem- 636308
- 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 Authenticator
- Role: User License: Active, Profile: salesmanager, Site.com Contributor User
- Marketing User, Offline User, Knowledge User, Flow User, Service Cloud 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

**Gmail inbox:**

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>

Again, welcome to Salesforce!

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

Reply | Forward

Change Your Password | Salesforce

artificialintelligence-d-dev-ed.develop.my.salesforce.com/\_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupId=ChangePa... Incognito (3) Finish update



## Change Your Password

Enter a new password for 2k20csit@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  
india

Change Password

Password was last changed on 01/10/2023, 7:24 pm.

Recently Viewed | Bank | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank\_\_c/list?filterName=Recent Incognito (3) Finish update

MECW

mecw Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New

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

List View

Recently Viewed | customers | [+ Incognito \(3\) Finish update](#)

# MECW

Search... [Search](#)

customers Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

(9) WhatsApp | Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesfor... | Welcome to Salesforce! | Reset Password | Salesfor... | [Finish update](#)

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

Setup Home Object Manager

Search Setup

Permission Sets

Help for this Page

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

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

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

Page 1 of 2

## Step 2:

### Permission Sets:

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

### Object-Level Security:

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

### Record-Level Security:

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

### Ownership:

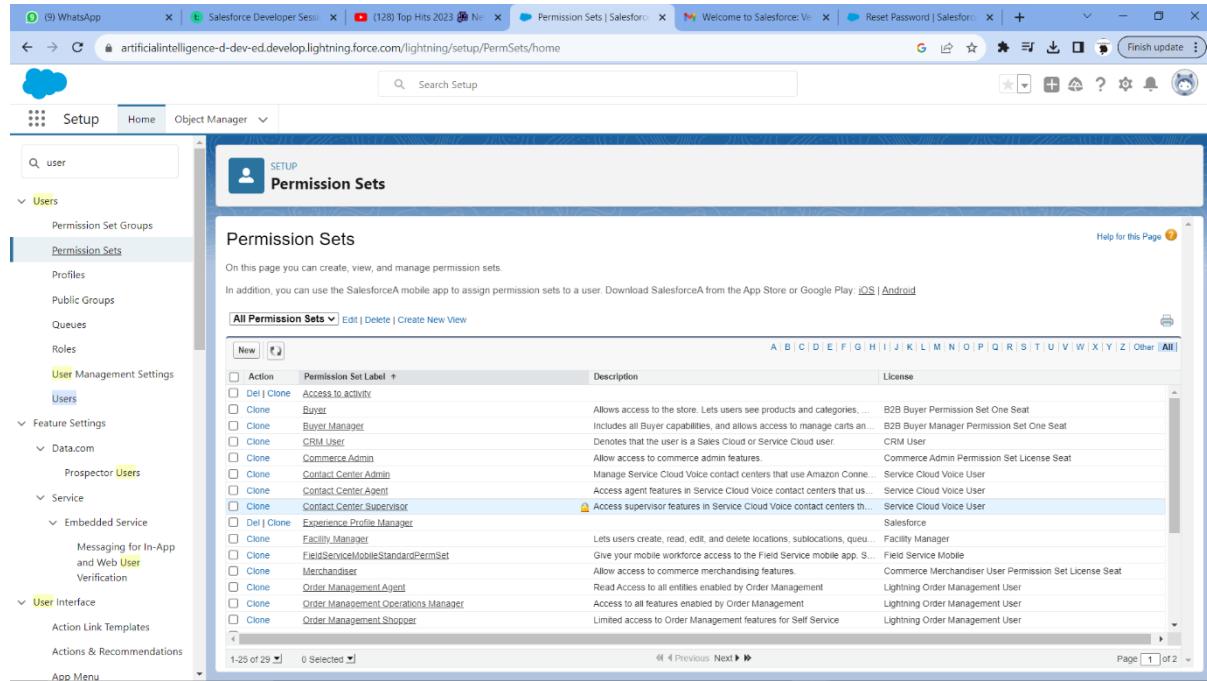
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## Organization-Wide Defaults:

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

## Testing:

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



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main content area displays a table of permission sets. The table columns are 'Action', 'Permission Set Label +', 'Description', and 'License'. The 'Description' column contains detailed explanations for each permission set, such as 'Allows access to the store. Lets users see products and categories, ...' for the 'Access\_to\_Activity' permission set. The 'License' column indicates which license is required for each permission set, such as 'B2B Buyer Permission Set One Seat' for the 'Access\_to\_Activity' permission set. The table also includes a header row with letters from A to Z and a 'More' link at the bottom right.

Action	Permission Set Label +	Description	License
<input type="checkbox"/>	Access_to_Activity	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer_Manager	CRM User
<input type="checkbox"/>	Clone	CRM_User	Commerce Admin
<input type="checkbox"/>	Clone	Commerce_Admin	Contact_Center_Admin
<input type="checkbox"/>	Clone	Contact_Center_Admin	Contact_Center_Agent
<input type="checkbox"/>	Clone	Contact_Center_Agent	Contact_Center_Supervisor
<input type="checkbox"/>	Clone	Contact_Center_Supervisor	Experience_Profile_Manager
<input type="checkbox"/>	Clone	Facility_Manager	FieldServiceMobileStandardPermSet
<input type="checkbox"/>	Clone	FieldServiceMobileStandardPermSet	Merchandiser
<input type="checkbox"/>	Clone	Merchandiser	Order_Management_Agent
<input type="checkbox"/>	Clone	Order_Management_Agent	Order_Management_Operations_Manager
<input type="checkbox"/>	Clone	Order_Management_Operations_Manager	Order_Management_Shopper
<input type="checkbox"/>	Clone	Order_Management_Shopper	

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. On the left, the navigation sidebar is open, showing categories like 'Users', 'Feature Settings', 'Data.com', 'Service', 'User Interface', and 'App Menu'. The 'Users' section is expanded, showing sub-options such as 'User Management Settings' and 'Prospector Users'. The main content area displays the 'Permission Set Create' page. The 'Enter permission set information' section requires the 'Label' (set to 'user') and 'API Name' (set to 'user'). The 'Description' field is empty. The 'Session Activation Required' checkbox is unchecked. Below this, the 'Select the type of users who will use this permission set' section includes a note about who will use the permission set ('None') and options for assigning it to multiple users or specific user or permission set licenses. The 'License' dropdown is set to '-None-'.

This screenshot is identical to the one above, except the 'Label' field now contains 'salesmanager' and the 'API Name' field also contains 'salesmanager'. All other fields and settings remain the same as in the first screenshot.

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

**Permission Set Overview:**

Setting	Description
API Name	salesmanager
Namespace Prefix	GOPALS_
Created By	GOPALS_ 01/10/2023, 7:29 pm

**Apps:**

- Assigned Apps:** Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps:** Settings that specify which connected apps are visible in the app menu.
- Object Settings:** Permissions to access objects and fields, and settings such as tab availability.
- App Permissions:** Permissions to perform app-specific actions, such as "Manage Call Centers".
- APEX Class Access:** Permissions to execute Apex classes.
- Visualforce Page Access:** Permissions to execute Visualforce pages.
- External Data Source Access:** Permissions to authenticate against external data sources.
- Flow Access:** Permissions to execute Flows.

**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	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invites	--	4	--
Appointment Schedule 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	--

Salesforce Developer Session | WhatsApp | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 42.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

Permission Set salesmanager

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

Permission Set Overview > Object Settings Bank

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 checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

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

Video Tutorial | Help for this Page

<https://artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%3Fs%3DEntityPermissions%26o%3D...>

Salesforce Developer Session | WhatsApp | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 42.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

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Feature Settings

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Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Permission Set salesmanager

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

Permission Set Overview > Object Settings Bank

Bank

Tab Settings

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

Video Tutorial | Help for this Page

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OP55j000008Phok/PermissionSetAssignment/home

Setup Home Object Manager

Search Setup

User salesmanager

Current Assignments

No assignments defined.

This screenshot shows the Salesforce Setup interface for managing users. The left sidebar is expanded to show the 'Users' section under 'User Management Settings'. The main area is titled 'salesmanager' and shows the 'Current Assignments' section, which displays a cactus and sun illustration and a message stating 'No assignments defined.' There are buttons for 'Edit', 'Delete', and 'Add Assignment'.

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OP55j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Search Setup

Select Users to Assign

All Users

Full Name ↑	All... ↓	Username	Role	Ac... ↓	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9oodih.d6cwpdcuo4wh.hnbdwvwvhq.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>	Force.com - App Subscription User	<input type="button" value="▼"/>
Chatter Expert	Chatty	chatty.00d5j00000bcskkkeab.lo0bfwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	<input type="button" value="▼"/>
Diya Adanna	dadan	test_diya_pas.4w8bjybi9wik.tszgrgsbkbpx.3gi8ofovzwns.h43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>	UMS User	<input type="button" value="▼"/>
GOPAL S	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>	System Administrator	<input type="button" value="▼"/>
Integration User	integ	integration@00d5j00000bcskkkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	<input type="button" value="▼"/>
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>	salesmanager	<input type="button" value="▼"/>
Security User	sec	insightssecurity@00d5j00000bcskkkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	<input type="button" value="▼"/>
sowmya bala	sbala	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>	Manager	<input type="button" value="▼"/>

Cancel Next

This screenshot shows the 'Select Users to Assign' dialog box. It lists several users with their full names, usernames, and profiles. The user 'madhu b' has a checked checkbox next to it, indicating it is selected for assignment. The dialog includes a search bar at the top and buttons for 'Cancel' and 'Next' at the bottom.

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/OP55j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

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		salesmanager		Salesforce Platform	Never Expires

Cancel Back Assign

This screenshot shows the 'Select an Expiration Option For Assigned Users' page in the Salesforce Setup. It displays a table of selected users, with one user ('madhu b') assigned to the 'salesmanager' profile. The user has a 'Salesforce Platform' license and 'Never Expires'. The 'Expires On' column is set to 'Never Expires'.

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/one/one.app#eyjjb21wb25lbREZWYiOjUzZXR1cF9wbGF0Zm9ybV9wZXItczpwc2FSZXN1bHRQYWdliw...

Setup Home Object Manager

PERMISSION SET 'SALESMANA' 1 assignments were successful.

salesmanager

Assignment Summary

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

Done

This screenshot shows the 'Assignment Summary' page after the permission set assignment was completed. A success message indicates '1 assignments were successful.' The summary table shows the user 'madhu b' assigned to the 'Salesforce Platform' license with a status of 'Success'.

Recently Viewed | customers | [S](#) [+](#)

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

MECW

mebw Bank customers Home

Search...

**Recently Viewed**

0 items • Updated a few seconds ago

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

**LIST VIEW CONTROLS**

New

- Clone
- Rename
- Sharing Settings
- Show List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

`javascript:void(0)`

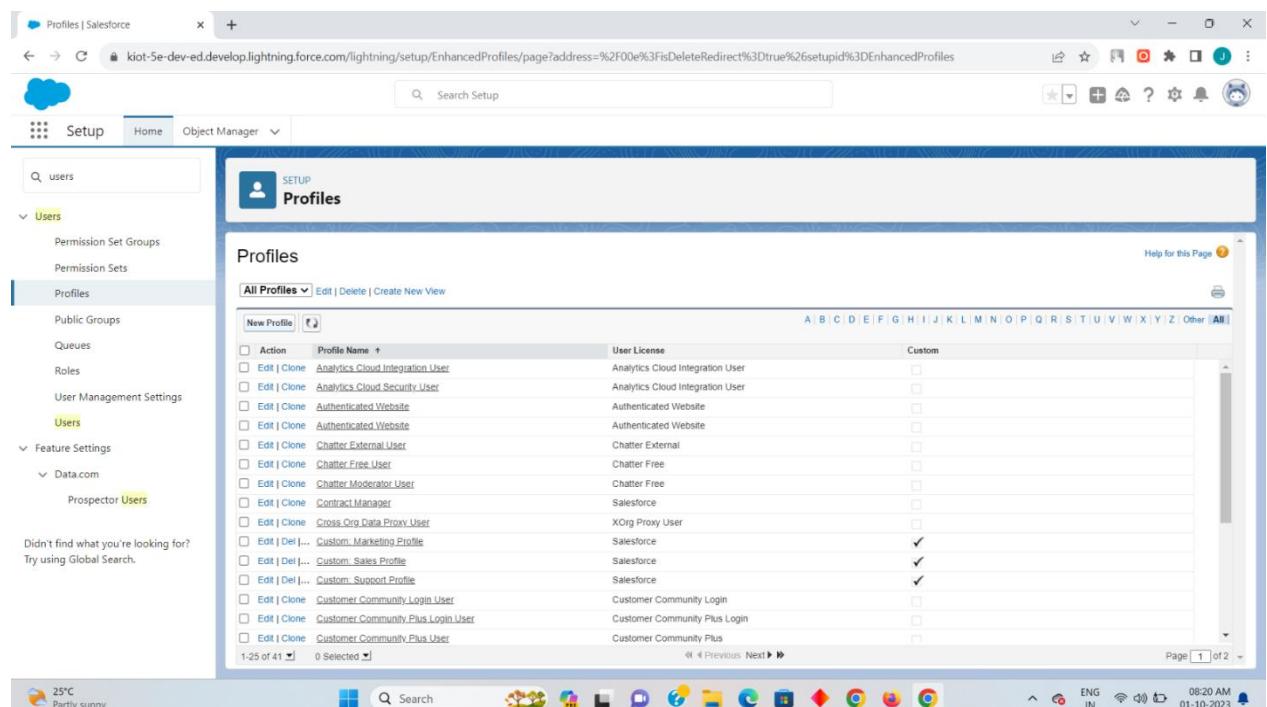
This screenshot shows a Salesforce Lightning interface for a 'customers' list view. The title bar includes 'Recently Viewed | customers' and a search bar. The main content area displays a table with a single row: 'You haven't viewed any customers recently. Try switching list views.' A context menu is open on the right side of the header, with 'New' highlighted. Other options in the menu include Clone, Rename, Sharing Settings, Show List Filters, Select Fields to Display, Delete, and Reset Column Widths.

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

## Solution:

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

## Setup-quick search[profile]



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

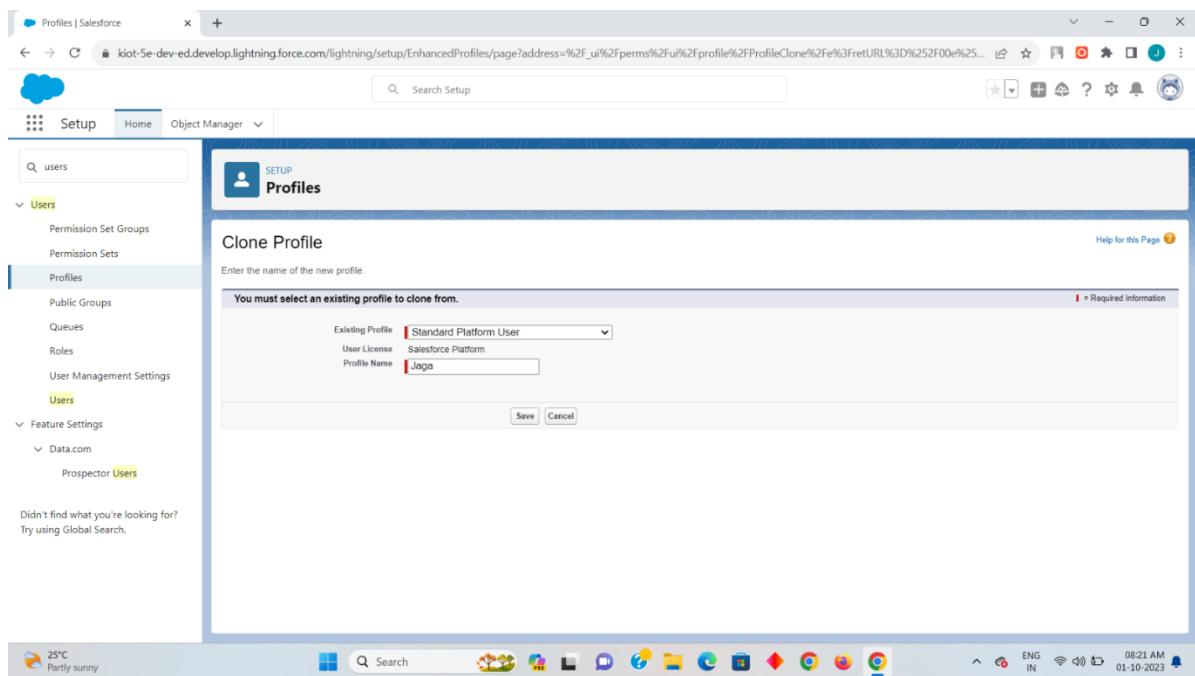
- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager. Under "Users", "Profiles" is selected.
- Section Header:** Profiles
- Sub-Header:** All Profiles
- Table:** A list of profiles with columns: Action, Profile Name, User License, and Custom. Some profiles have checkboxes next to them.

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   Del  ...	Custom - Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del  ...	Custom - Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del  ...	Custom - Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>

- Page Footer:** 25°C Partly sunny, Search bar, various icons, and system status (ENG IN, 08:20 AM, 01-10-2023).

## Step 2:

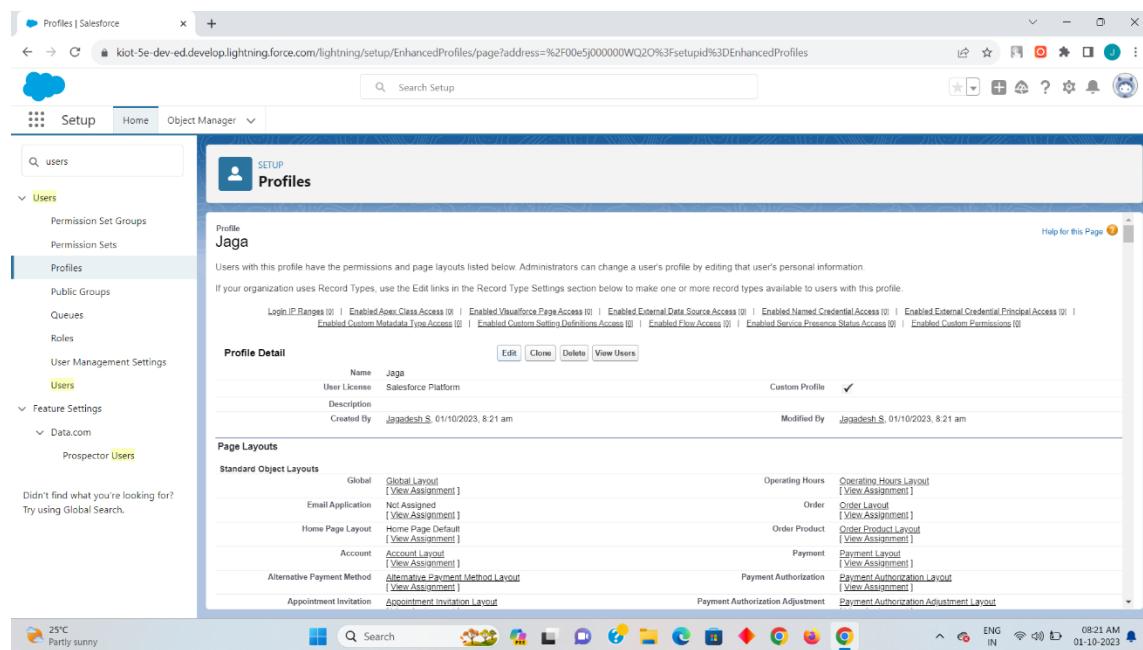
Click on the new to create a new profile along with the label and Api



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

## Step 3:

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



Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3Fr?url%3D%252F00e5j00000WQ2O%253Fsetupid...

Setup Home Object Manager

Search Setup

Users

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

Users

- Feature Settings
- Data.com
- Prospector Users**

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

25°C Partly sunny

SETUP Profiles

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

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees: Separate Experience Cloud site and Salesforce login authentication for employees.

Relax login IP restrictions: Skip employee device activation during Experience Cloud site login.

25°C Partly sunny

08:21 AM 01-10-2023

Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3Fr?url%3D%252F00e5j00000WQ2O%253Fsetupid...

Setup Home Object Manager

Search Setup

Users

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

Users

- Feature Settings
- Data.com
- Prospector Users

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

25°C Partly sunny

SETUP Profiles

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

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

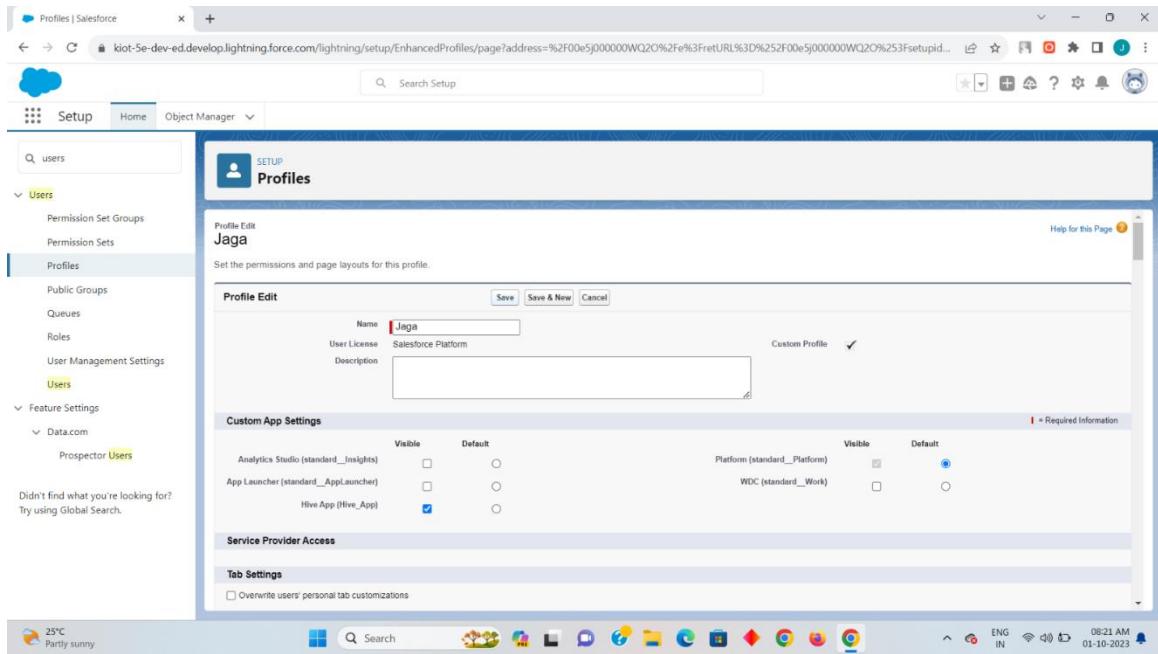
Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees: Separate Experience Cloud site and Salesforce login authentication for employees.

Relax login IP restrictions: Skip employee device activation during Experience Cloud site login.

25°C Partly sunny

08:21 AM 01-10-2023



## Step 4

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



## Step 5:

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty@00d500000c8oseaf6z@bkrikid4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit Grey Jane	JGrey	jane_gran_fygnimmajm.c27d2kioqth@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	Edit S.Jaga	JS	jaga08@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit S.Jagadesh	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit S.Jagadesh	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit User_Integration	Integ	integration@00d500000c8oseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit User_Security	sec	insightssecurity@00d500000c8oseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Setup - Users

New User

User Edit

General Information

First Name	Jagadesh11
Last Name	S
Alias	JS
Email	jwv123@gmail.com
Username	jwv123@gmail.com
Nickname	User169612875144962592
Title	
Company	
Department	
Division	

Role: Director, Channel Sales  
User License: Salesforce Platform  
Profile: -None-  
Active: Jaga  
Marketing User: Standard Platform 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

Save | Save & New | Cancel | Help for this Page

Salesforce Setup - Users

New User

User Edit

General Information

First Name	Jagadesh22
Last Name	S
Alias	JS
Email	jw11@gmail.com
Username	jw11@gmail.com
Nickname	User169612879983618745
Title	
Company	
Department	
Division	

Role: Marketing Team  
User License: Salesforce Platform  
Profile: -None-  
Active: Jaga  
Marketing User: Standard Platform 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

Save | Save & New | Cancel | Help for this Page

Salesforce Setup - 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 | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh	JS	jwv123@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh22	JS	js123@gmail.com	SE Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh	JS	jwv117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh11	JS	jwv123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh22	JS	js123@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Marketing Team

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 | Other | All

Save | Save & New | Cancel | Help for this Page

Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

## Step 6:

Now the two user as been created with the profile so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can created as

setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Permission Sets

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

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

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

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone	Buyer	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	CRM User	CRM User
<input type="checkbox"/>	Clone	Commerce Admin	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Commerce
<input type="checkbox"/>	Clone	Contact_Center_Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Commerce
<input type="checkbox"/>	Clone	Contact_Center_Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Commerce
<input type="checkbox"/>	Del/Clone	Experience Profile Manager	Salesforce
<input type="checkbox"/>	Clone	Facility Manager	Facility Manager
<input type="checkbox"/>	Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. <a href="#">Learn more</a>
<input type="checkbox"/>	Clone	Merchandise	Allow access to commerce merchandising features
<input type="checkbox"/>	Clone	OrderManagementAgent	Read Access to all entities enabled by Order Management
<input type="checkbox"/>	Clone	OrderManagementOperationsManager	Access to all features enabled by Order Management

1-25 of 30 | 0 Selected | [New](#) | [Edit](#) | [Delete](#) | [Create New View](#)

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](#)

Help for this Page

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

25°C Partly sunny

Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Permission Set Create

Enter permission set information

Label:  API Name:  Description:   
Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

Help for this Page

https://kiot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

25°C Partly sunny

Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5\$000008Pgt%3FsfdclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

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Did you find what you're looking for?  
Try using Global Search.

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Search

Cloud File Explorer Home Help

Video Tutorial | Help for this Page

API Name permission12  
Namespace Prefix  
Created By Jagadish S. 01/10/2023, 8:24 am

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

Permission Set Overview

Description  
License  
Session Activation Required  
Last Modified By

Apps

Assigned Apps  
Assigned Connected Apps  
Object Settings  
App Permissions  
Apex Class Access  
Visualforce Page Access  
External Data Source Access

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5\$000008Pgt%3DsEntityPermissions

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

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Did you find what you're looking for?  
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Search

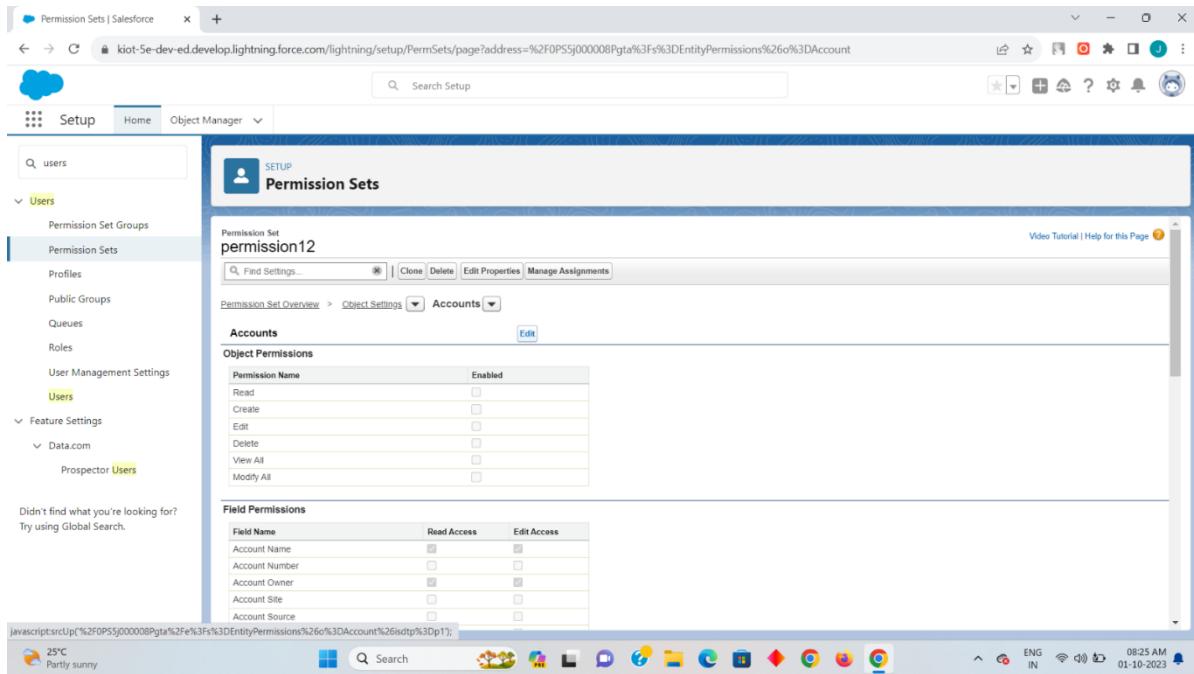
Cloud File Explorer Home Help

Video Tutorial | Help for this Page

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	9	--
Accounts	No Access	44	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API AromaEvent Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invites	--	4	--
Appointment Schedule 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	--

ENG IN 08:25 AM 01-10-2023



## Step 7:

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

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

- Initial State (Top Screenshot):** The 'Delete' permission under 'Object Permissions' for the 'Accounts' object is currently unchecked.
- Intermediate State (Middle Screenshot):** The 'Delete' permission has been checked, indicating it will be granted to users assigned to this permission set.
- Final State (Bottom Screenshot):** The changes have been saved, and the 'Delete' permission is now checked in the list.

## Step 8

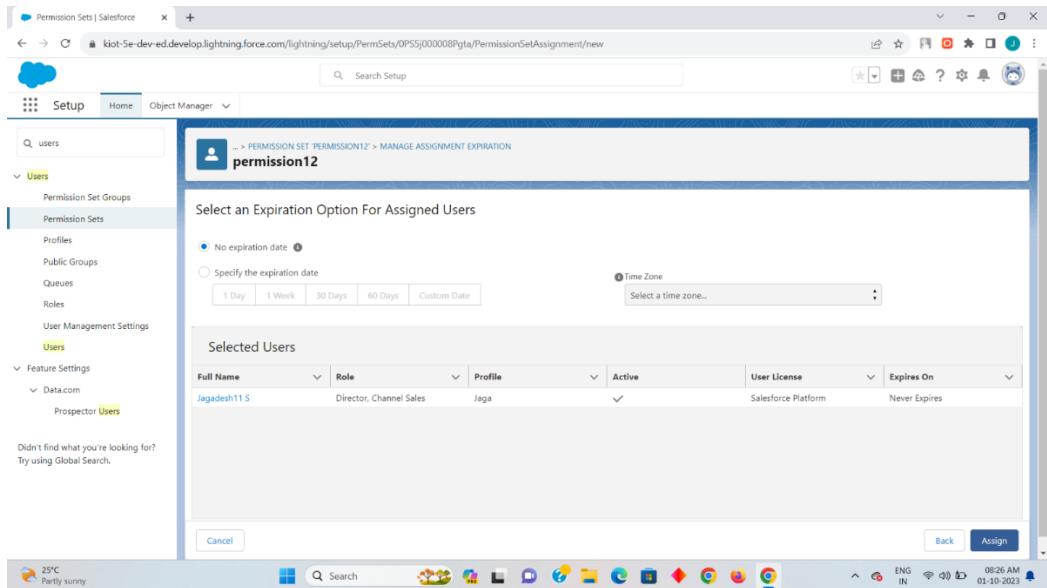
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.

The screenshot shows the 'Permission Sets | Salesforce' page. The left sidebar is expanded, showing 'Users' selected under 'Permission Sets'. The main content area is titled 'permission12' and shows a section titled 'Current Assignments' with a cactus and sun icon. Below it, a message says 'No assignments defined.' A small note at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

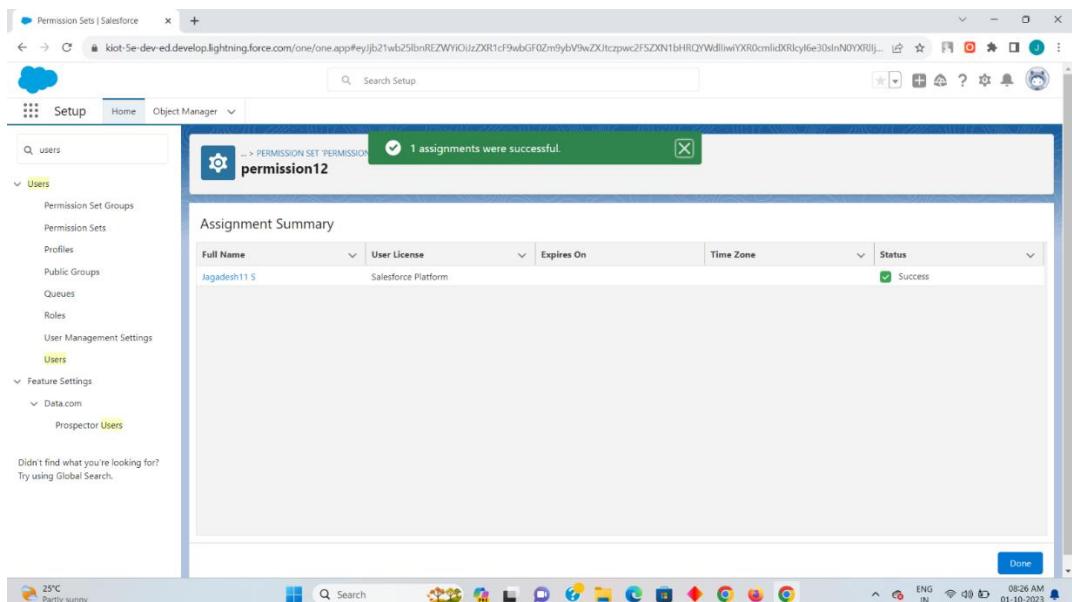
This screenshot shows the 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog. It has a title bar 'permission12'. The main area is titled 'Select Users to Assign' and contains a table with columns: Full Name, Alias, Username, Role, Active, and Profile. A search bar at the top right shows 'jagadesh'. A note below the search bar says 'Roles, Alias, and Profile aren't searchable. Use filters or sort on these fields instead.' The table lists four users: Jagadesh S, Jagadesh S, Jagadesh11 S, and Jagadesh22 S. The 'Active' column for Jagadesh11 S is checked. A 'Next' button is visible at the bottom right.

This screenshot shows the same 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog. The 'Active' column for Jagadesh11 S is now unchecked. A note at the bottom left says '1 item selected'.

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**.

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

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

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

Email Template  
Thank You Email - Survey

Edit in Builder Edit Clone ▾

**Details** Related

**Information**

Email Template Name Thank You Email - Survey	Related Entity Type Survey Result
Description	Folder Public Email Templates
Made in Email Template Builder <input checked="" type="checkbox"/>	

**Message Content**

Subject Thank You For Completing Our Survey!	Enhanced Letterhead
HTML Value	<p>Hi {{{Survey_Result__c.Name__c}}},</p> <p>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.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>

**Additional Information**

Created By Rakesh Gupta, 12/21/2020, 4:23 PM	Last Modified By Rakesh Gupta, 12/21/2020, 4:32 PM
---	---

## Step 3: Create an Email Alert

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

- 5. For Object select Survey Result.**
- 6. For the Email Template chooses Lightning Email Template Thank You Email – Survey.**
- 7. For Recipient Type select Email Field: Email.**
- 8. Click Save.**

Survey - Thank You Email

Description: Survey - Thank You Email

Unique Name: Survey\_Thank\_You\_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Recipient Type: Email Field: Email

Available Recipients:

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

Selected Recipients:

- Email Field: Email

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: Save Response \* API Name: Save\_Response

Description:

How Many Records to Create:
  One
  Multiple

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

Create a Record of This Object:
 \* Object: Survey Result

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text" value="A_a Comment"/>
Email__c	<input type="text" value="A_a Email &gt; Value"/>
Name__c	<input type="text" value="(!Name.firstName) (!Name.lastName)"/>
Rating__c	<input type="text" value="A_a Rating"/>
<a href="#">+ Add Field</a>	
<input type="checkbox"/> Manually assign variables	

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

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

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

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

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

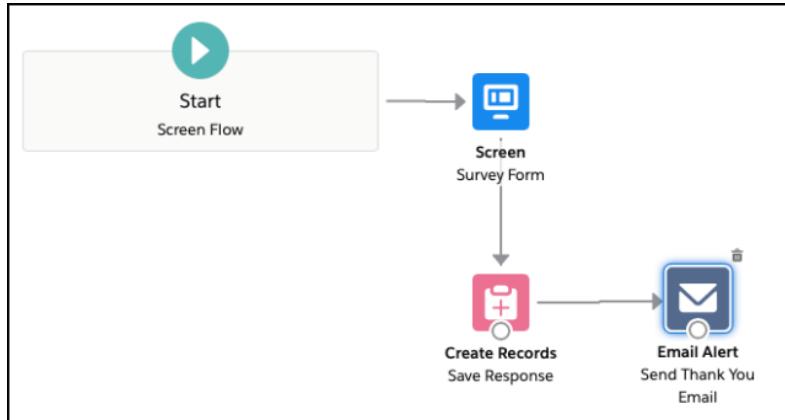
### 5.Click Done.

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	
Set Input Values	
Aa * Record ID (!Save_Response)	
<span style="float: right;">Cancel</span> <span style="background-color: #0070C0; color: white; padding: 2px 5px; border-radius: 5px;">Done</span>	

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 i  
User or System Context—Depends on How Flow is Launched

\* Type  
Screen Flow

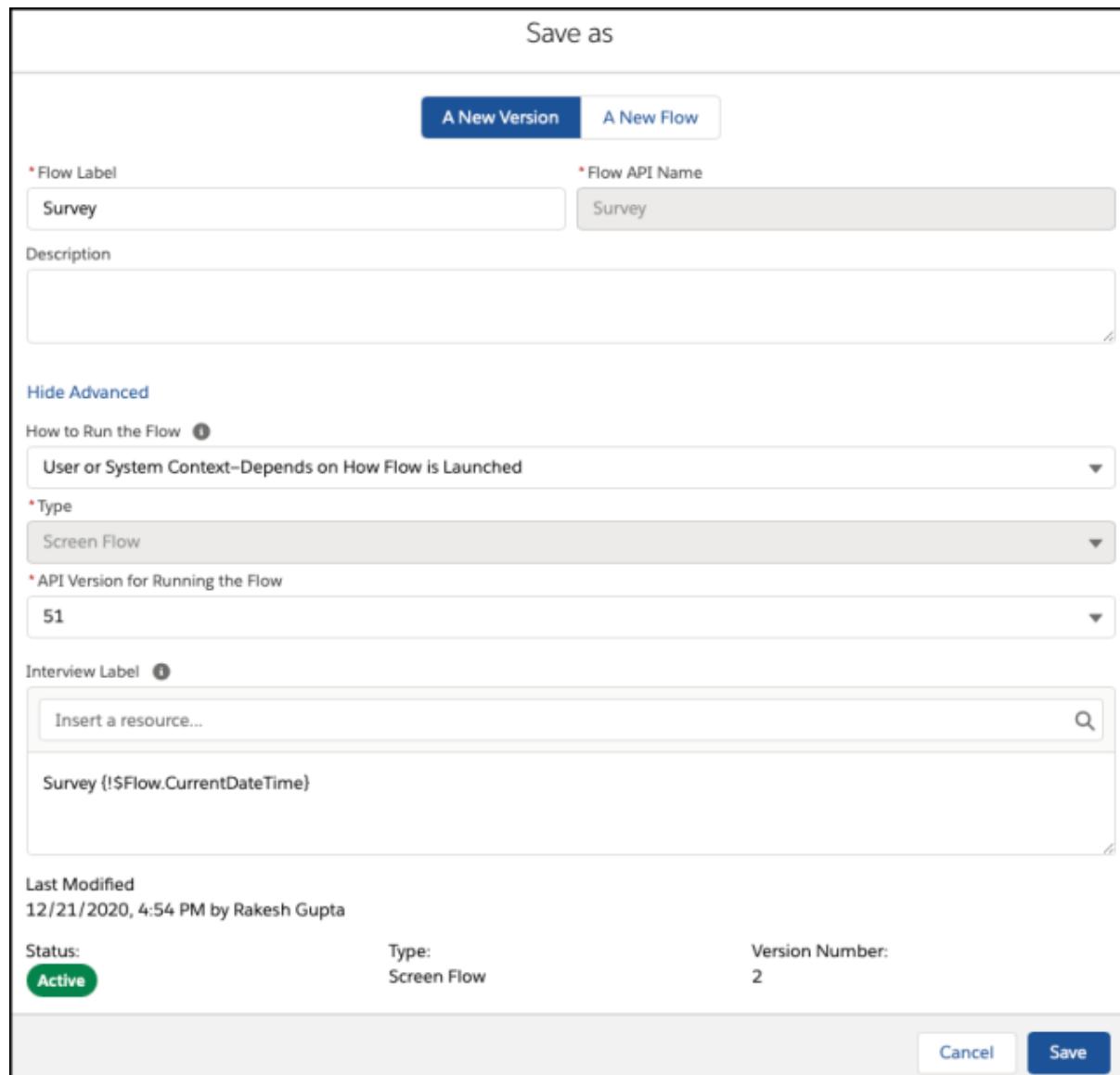
\* API Version for Running the Flow  
51

Interview Label i  
Insert a resource... 🔍  
Survey {!\$Flow.CurrentDateTime}

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

Status: Active Type: Screen Flow Version Number: 2

Cancel Save



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

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

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

The screenshot shows the Salesforce IDE interface. The top menu bar includes File, Edit, Debug, Test, Workspace, Help, and navigation icons. A tab labeled "VFPageToLC.app \*" is active. The main editor area contains the following code:

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

The code defines a Lightning Application component named "VFPageToLC.app". It specifies global access, extends the "ltng:outApp" base component, and implements the "ltng:allowGuestAccess" interface. It also declares a dependency on the "lightning:flow" component.

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

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

Add the Lightning Components for Visualforce JavaScript library to your Visualforce page using the **<apex:includeLightning/>** component. In the Visualforce page, reference the dependency app. Then write a JavaScript function that creates the

# component on the page using `$Lightning.createComponent()`

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

The screenshot shows the Salesforce Visualforce Page editor for a page named 'Survey'. The 'Page Information' section includes fields for Label ('Survey'), Name ('Survey'), and Description. Under 'Available for Lightning Experience, Experience Builder sites, and the mobile app', the 'Checkmark' checkbox is selected. The 'Visualforce Markup' tab is active, showing the following code:

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

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

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

1. Click **Setup**.

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

**Site Edit**

**Save** **Cancel**

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

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

## Proof of Concept

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

Survey

Name

First Name  
Alok

Last Name  
Sinfal

\*Email  
[REDACTED]

\*Rating  
5

\*Comment  
Awesome Blog 

**Next**

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

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

 **Survey Site Guest User** via [bj9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com](#) to me 

8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,  
Automation Champion