

Naan Mudhalvan
Salesforce Developer(Course)
Assignment no 1

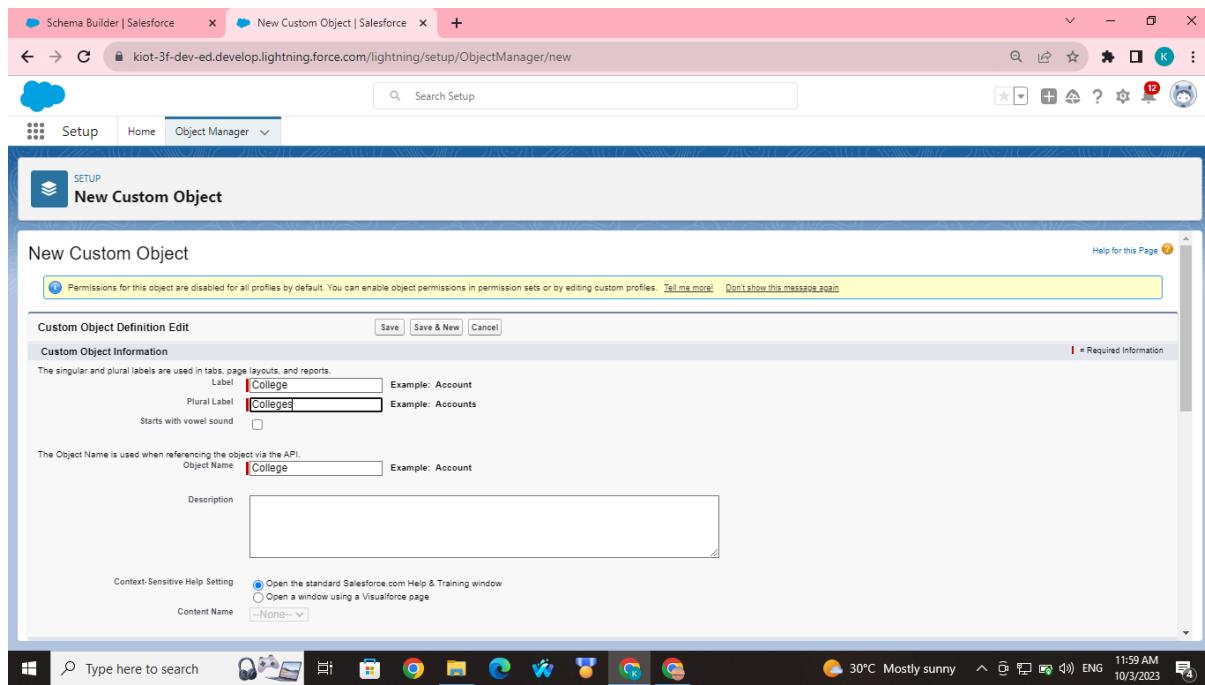
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Naan Mudhalvan id: au611220205043
Year & Dept: 4th year & IT
Batch: 2024
Zone no: Zone 8

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

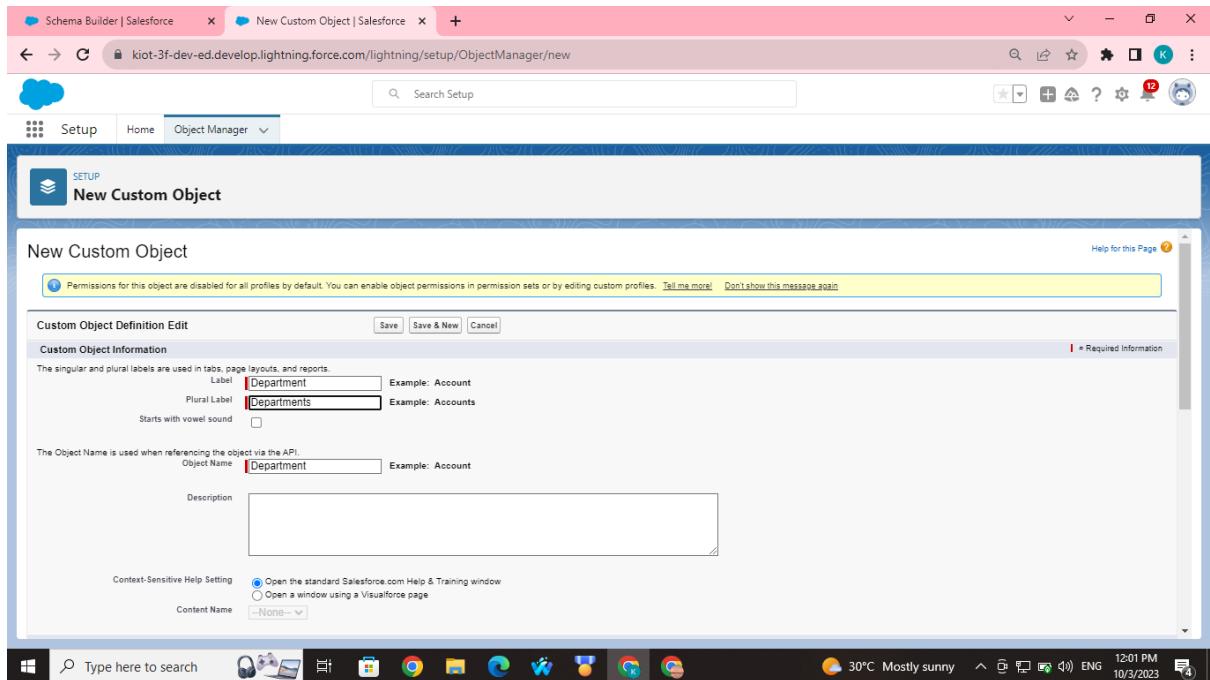
Solution:

Step 1: Create Custom Objects

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



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



Step 2: Create a Master-Detail Relationship

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

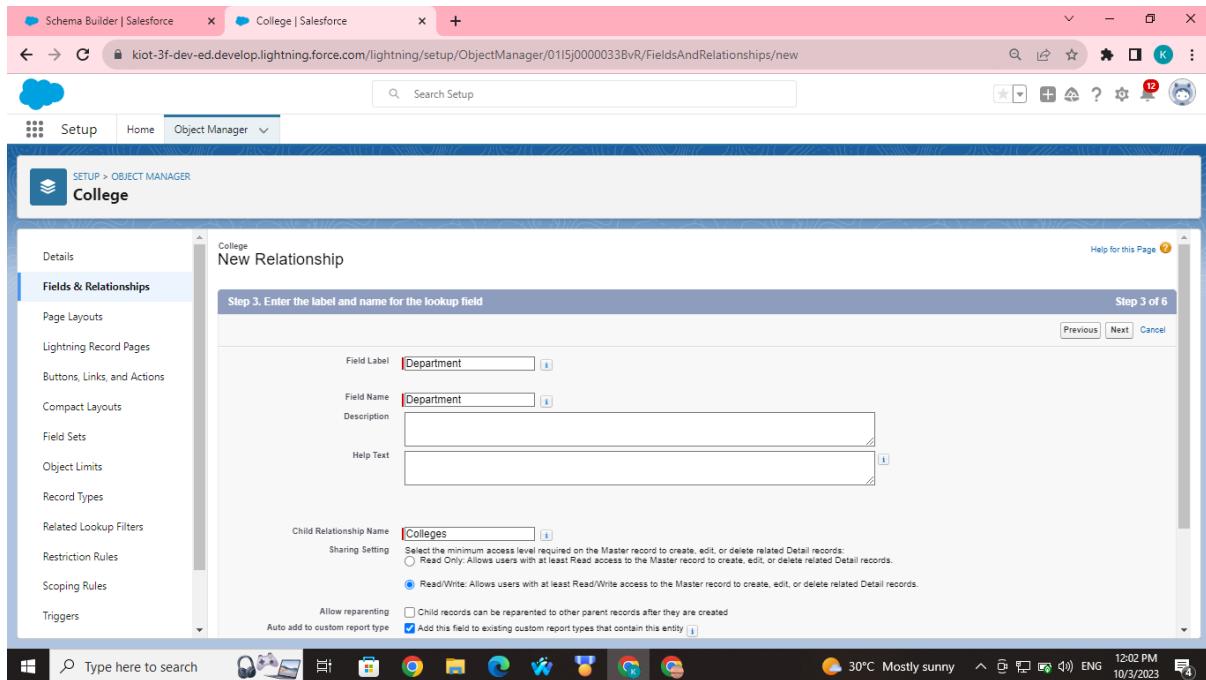
1. Go to Setup > Object Manager.
2. Click on "College" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."
4. Click the "New" button to create a new custom field.
5. Choose "Master-Detail Relationship" as the data type.
6. Enter a label for the relationship, e.g., "Department."
7. Choose "Department" 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.

The screenshot shows the Salesforce Object Manager interface. At the top, there are two tabs: 'Schema Builder | Salesforce' and 'Department | Salesforce'. The URL in the address bar is 'kiot-3f-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5j000003Bvg/Details/view'. Below the tabs, there's a search bar labeled 'Search Setup' and a navigation bar with icons for Home, Object Manager, and Setup. The main area is titled 'Department' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, and Triggers. The 'Fields & Relationships' option is selected. The main panel displays the 'Details' section for the 'Department' object. It includes fields for API Name (Department__c), Singular Label (Department), Plural Label (Departments), and other settings like Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard Help Window. At the bottom right of the main panel are 'Edit' and 'Delete' buttons. A second screenshot below shows the 'Fields & Relationships' step 4 of 5 for a new custom field named 'College'. It shows the field-level security configuration, where several profiles are selected with checkboxes for 'Visible' and 'Read-Only' permissions. The profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, and Custom: Support Profile. The status bar at the bottom indicates it's 12:01 PM on 10/3/2023, with a temperature of 30°C and weather as Mostly sunny.

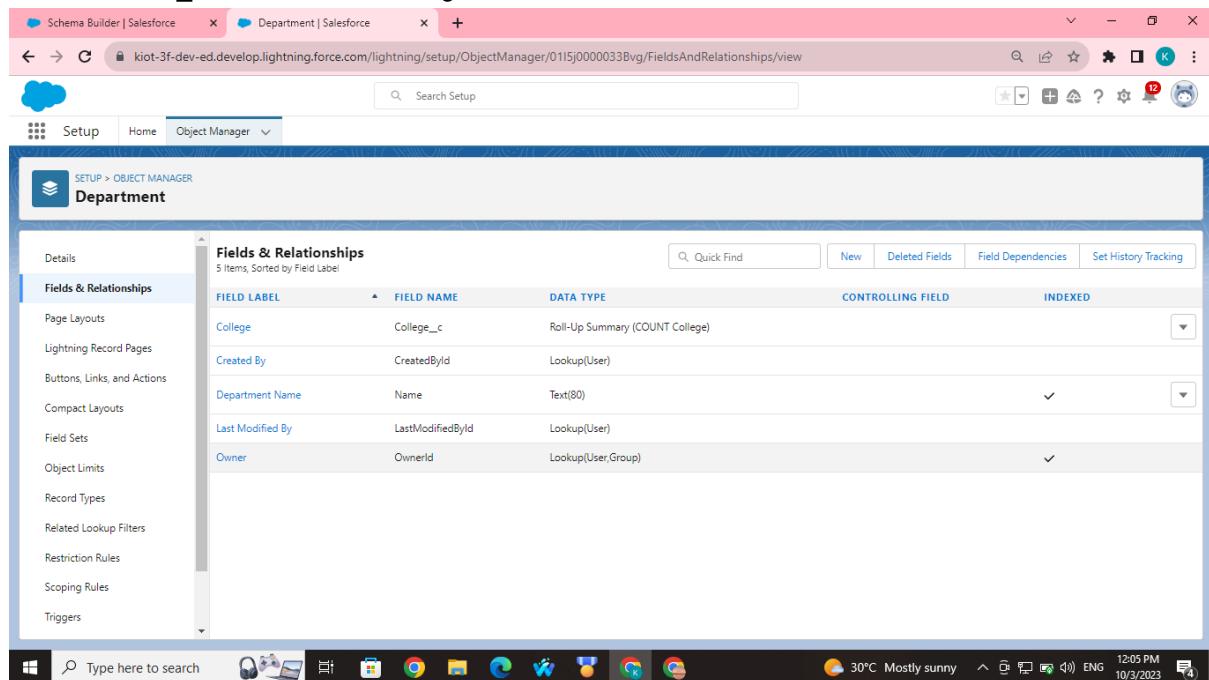


Step 3: Create the Roll-Up Summary Field

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 Object Manager interface for the 'Department' object. The 'Fields & Relationships' tab is selected. A table lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
College	College__c	Roll-Up Summary (COUNT College)		
Created By	CreatedById	Lookup(User)		
Department Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		

Schema Builder | Salesforce Tabs | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2FobjectCustomTabWizard.jsp%3FretURL%3D%252...

Search 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

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details

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

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

Object: DOOK

Tab Style: Headset

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

Splash Page Custom Link: --None--

Enter a short description.

Description:

Next Cancel

Type here to search

Schema Builder | Salesforce Department | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Ij0000033Bvg/FieldsAndRelationships/new

Search Setup

SETUP > OBJECT MANAGER Department

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

Department New Custom Field

Step 5. Add to page layouts

Field Label: College

Data Type: Roll-Up Summary

Field Name: College

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

Department Layout

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

Previous Save & New Save Cancel

Type here to search

Schema Builder | Salesforce Department | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5j0000033Bvg/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Department

New Custom Field

Step 3 of 5

Help for this Page

Previous Next Cancel

Select Object to Summarize

Master Object: Department
Summarized Object: Collegues

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
Only records meeting certain criteria should be included in the calculation

Step 3 of 5

Help for this Page

Previous Next Cancel

Type here to search

30°C Mostly sunny 12:04 PM 10/3/2023

Setup Home Object Manager

SETUP > OBJECT MANAGER college

New Custom Field

Step 1

Help for this Page

Next Cancel

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

Data Type

None Selected (radio button selected)

Select one of the data types below:

- Auto Number
- Formula
- Roll-Up Summary** (radio button selected)
- Lookup Relationship
- Master Detail Relationship
- External Lookup Relationship

Roll-Up Summary

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

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

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

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.

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

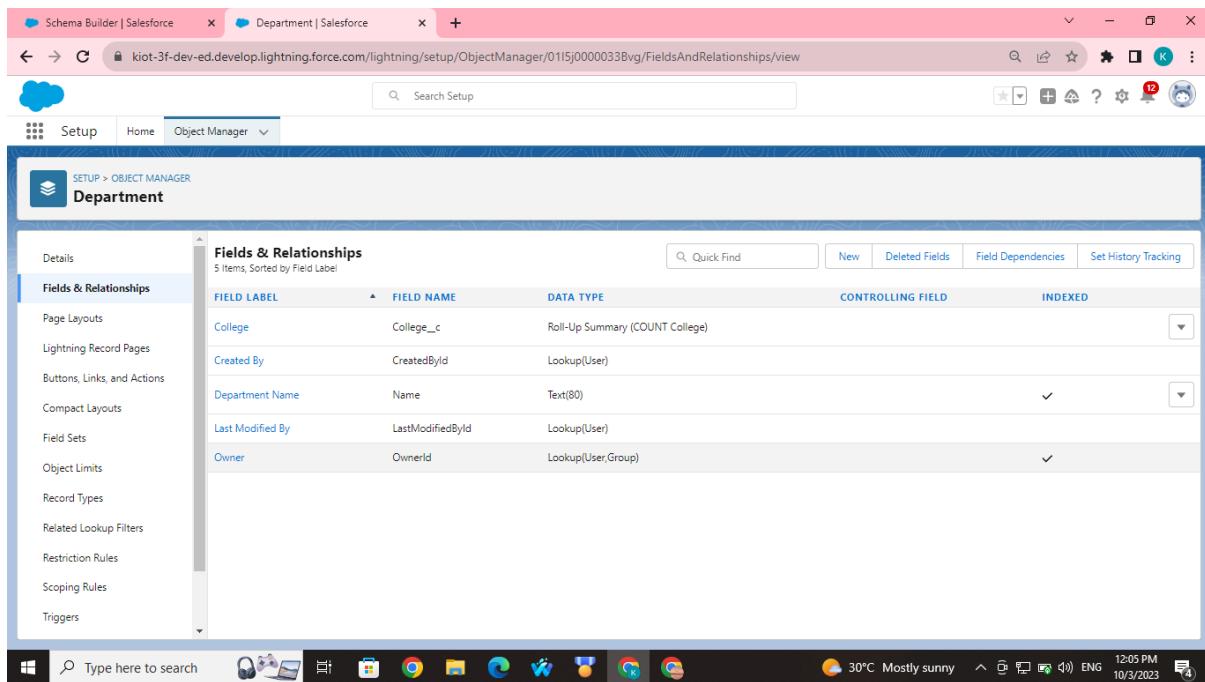
- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail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

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

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

External Lookup Relationship

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



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.

New Custom Object Tab

Step 2. Add to Profiles

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

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On

New Custom Object Tab

Step 1. Enter the Details

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

Select an existing custom object or [create a new custom object now](#).
Object: book
Tab Style: Headset

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: --None--

Enter a short description.

Description:

Next Cancel

Schema Builder | Salesforce Tabs | Salesforce

kiot-3f-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2FobjectCustomTabWizard.jsp%3Fr?url%3D%252...

Cloud Setup Home Object Manager

Quick Find

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION > Users > Data > Email PLATFORM TOOLS > Subscription Management > Apps > Feature Settings

SETUP Tabs Step 3 of 3 Step 3. Add to Custom Apps

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

Custom App	<input checked="" type="checkbox"/> 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"/>

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Schema Builder | Salesforce App Manager | Salesforce

kiot-3f-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Cloud Setup Home Object Manager

Quick Find

Apps

App Manager AppExchange Marketplace Connected Apps Connected Apps OAuth Usage Manage Connected Apps Lightning Bolt Flow Category Lightning Bolt Solutions Mobile Apps Salesforce Salesforce Branding Salesforce Navigation Salesforce Notifications Salesforce Offline Salesforce Settings

SETUP Lightning Experience App Manager

New Lightning App New Connected App

21 items • Sorted by App Name • Filtered by All appnenitems - TabSet Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
All Tabs	AllTabSet		26/09/2023, 2:29 pm	Classic	<input checked="" type="checkbox"/>
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	26/09/2023, 2:29 pm	Classic	<input checked="" type="checkbox"/>
App Launcher	AppLauncher	App Launcher tabs	26/09/2023, 2:29 pm	Classic	<input checked="" type="checkbox"/>
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	26/09/2023, 2:32 pm	Lightning	<input checked="" type="checkbox"/>
Community	Community	Salesforce CRM Communities	26/09/2023, 2:29 pm	Classic	<input checked="" type="checkbox"/>
Content	Content	Salesforce CRM Content	26/09/2023, 2:29 pm	Classic	<input checked="" type="checkbox"/>
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	26/09/2023, 2:29 pm	Lightning	<input checked="" type="checkbox"/>
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	26/09/2023, 2:29 pm	Lightning	<input checked="" type="checkbox"/>
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	26/09/2023, 2:29 pm	Lightning	<input checked="" type="checkbox"/>
Marketing	Marketing	Best-in-class on-demand marketing automation	26/09/2023, 2:29 pm	Classic	<input checked="" type="checkbox"/>
Platform	Platform	The fundamental Lightning Platform	26/09/2023, 2:29 pm	Classic	<input checked="" type="checkbox"/>
Queue Management	QueueManagement	Create and manage queues for your business.	26/09/2023, 2:29 pm	Lightning	<input checked="" type="checkbox"/>
Sales	Sales	The world's most popular sales force automation (SFA) solution	26/09/2023, 2:29 pm	Classic	<input checked="" type="checkbox"/>

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Salesforce Tabs

Custom Tabs

Custom Object Tabs

Action Label Tab Style

books Headed

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

No Lightning component tabs have been defined

New Lightning App

App Details & Branding

App Details

*App Name: My College

*Developer Name: My_College

Description: Enter a description...

App Branding

Image:

Primary Color Hex Value: #0070D2

Org Theme Options: Use the app's image and color instead of the org's

Next

12 Queue Management QueueManagement Create and manage queues for your business. 26/09/2023, 2:29 pm Lightning ✓

13 Sales Sales The world's most popular sales force automation (SFA) solution. 26/09/2023, 2:29 pm Classic

Conclusion:

Now, whenever you create or update a record in the "Department_c" related to a "College_c," the "TotalCount_c" field on the "College_c" will automatically update to show the total number of related records.

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

2. If there are 2 users, 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.

Schema Builder | Salesforce Profiles | Salesforce

kiot-3f-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup Home Object Manager

Search Setup

Profiles

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

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

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

1-8 of 8 | 0 Selected | Page 1 of 1

Type here to search

Schema Builder | Salesforce Profiles | Salesforce

kiot-3f-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3Fid%...

Setup Home Object Manager

Search Setup

Profiles

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="Manager"/>

Save Cancel

Type here to search

30°C Mostly sunny 12:26 PM 10/3/2023

JavaScript srcUp(%27%2Fui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3Fid%3D00e5j0000059VW%26setupId%3DEnhancedProfiles%26retURL%3D%252F00e%253Fr%253D00B5j00000arORN%2526rolodexIndex%253D18%2526page%253D...

30°C Mostly sunny 12:27 PM 10/3/2023

Schema Builder | Salesforce Profiles | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000nnCh%3Fsetupid%3DEnhancedProfiles

Setup Home Object Manager

Search Setup

Profile Manager

Manager

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

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

Profile Detail

Name	Manager
User License	Salesforce Platform
Description	
Created By	KERTHIKAG_03/10/2023, 12:27 pm
Modified By	KERTHIKAG_03/10/2023, 12:27 pm

Page Layouts

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

Type here to search

Schema Builder | Salesforce Profiles | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000nnCh%3FretURL%3D%252F00e5j00000nn...

Setup Home Object Manager

Search Setup

Profile Edit Manager

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

Analytics Studio (standard__Insights)	Visible <input type="checkbox"/>	Default <input type="radio"/>	Visible <input checked="" type="checkbox"/>	Default <input checked="" type="radio"/>	
App Launcher (standard__AppLauncher)	Visible <input type="checkbox"/>	Default <input type="radio"/>	WDC (standard__Work)	Visible <input type="checkbox"/>	Default <input type="radio"/>
My College (My_College)	Visible <input checked="" type="checkbox"/>	Default <input type="radio"/>			

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

30°C Mostly sunny 12:27 PM 10/3/2023

Type here to search

Schema Builder | Salesforce Profiles | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000nnCh%3FretURL%3D%252F00e5j00000nn...

Setup Home Object Manager

Search Setup

Profile Edit Manager

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

Analytics Studio (standard__Insights)	Visible <input type="checkbox"/>	Default <input type="radio"/>	Visible <input checked="" type="checkbox"/>	Default <input checked="" type="radio"/>	
App Launcher (standard__AppLauncher)	Visible <input type="checkbox"/>	Default <input type="radio"/>	WDC (standard__Work)	Visible <input type="checkbox"/>	Default <input type="radio"/>
My College (My_College)	Visible <input checked="" type="checkbox"/>	Default <input type="radio"/>			

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

30°C Mostly sunny 12:29 PM 10/3/2023

Schema Builder | Salesforce Profiles | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000nnCh%2Fe%3FretURL%3D%25F00e5j00000n...

Setup Home Object Manager

Search Setup

Profiles

Communication Subscription Timings

Contacts	Checkboxes
Contact Point Addresses	Checkboxes
Contact Point Consents	Checkboxes
Contact Point Emails	Checkboxes

Party Consents

Push Topics	Checkboxes
Sellers	Checkboxes
Streaming Channels	Checkboxes

User External Credentials

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration
books	Checkboxes	Checkboxes	Checkboxes	Checkboxes	Checkboxes
Child_Objects__c	Checkboxes	Checkboxes	Checkboxes	Checkboxes	Checkboxes
Colleges	Checkboxes	Checkboxes	Checkboxes	Checkboxes	Checkboxes

	Basic Access	Create	Edit	Delete	Data Administration
Departments	Checkboxes	Checkboxes	Checkboxes	Checkboxes	Checkboxes
Parent_Objects__c	Checkboxes	Checkboxes	Checkboxes	Checkboxes	Checkboxes

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

Save Save & New Cancel

30°C Mostly sunny 12:30 PM ENG 10/3/2023

Type here to search

Schema Builder | Salesforce Users | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Search Setup

All Users

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

In addition, download Salesforce® A 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"/>	Chatter Expert	Chatter	shatty@005f00000dbxoeah.mysite3c3ia@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	G KEERTHIKA	KG	2e20ff42@kiot.ae.in		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User Integration	Integ	integration@005f00000dbxoeah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User Security	sec	insightsecurity@005f00000dbxoeah.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

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

Type here to search

Schema Builder | Salesforce Users | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOverride...

Setup Home Object Manager

Search Setup

New User

User Edit

General Information

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

Role User License Profile

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 Data.com Monthly Addition Limit Accessibility Mode (Classic Only) High-Contrast Palette on Charts

30°C Mostly sunny 12:31 PM 10/3/2023

Schema Builder | Salesforce Users | Salesforce

kiot-3f-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOverride...

Setup Home Object Manager

Search Setup

New User

User Edit

General Information

First Name: Lessa D
Last Name: D
Alias: Id
Email: 2k20it52@kiot.ac.in
Username: keerthika@gmail.com
Nickname: User169631652287688578
Title: worker
Company: KIOT
Department:
Division:

Role: <None Specified>
User License: Partner App Subscription
Profile: Partner App Subscription User
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:

Type here to search

Inbox (3,146) - 2k20it52@kiot.ac.in

30°C Mostly sunny 12:33 PM 10/3/2023

Schema Builder | Salesforce Users | Salesforce

kiot-3f-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOverride...

Setup Home Object Manager

Search Setup

User Jaya A

User Detail

Name: Jaya A
Alias: ja
Email: 2k20it52@kiot.ac.in
Username: keeth@kiot.ac.in
Nickname: User16963171200471059380
Title:
Company:
Department:
Division:
Address:
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale: English (India)
Language: English
Delegated Approver: Manager
Receive Approval Request Emails: Only if I am an approver

Role

User License: Partner App Subscription
Profile: Partner App Subscription User
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: View
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):
Debug Mode:

Type here to search

Inbox (3,146) - 2k20it52@kiot.ac.in

30°C Mostly sunny 12:42 PM 10/3/2023

Screenshot of a Microsoft Edge browser window showing three tabs:

- Schema Builder | Salesforce
- Users | Salesforce
- Welcome to Salesforce: Verify yo...

The middle tab displays an email from support@salesforce.com with the subject "Welcome to Salesforce!". The email body contains the following text:

Welcome to Salesforce!

Click below to verify your account.

[Verify Account](https://kiot-3f-dev-ed.my.salesforce.com)

To easily log in later, save this URL.
https://kiot-3f-dev-ed.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupid=ChangePasswo...

Username:
keerthi@kiot.ac.in

Again, welcome to Salesforce!

At the bottom of the page, there is a copyright notice: © Copyright 2000-2018 salesforce.com inc. All rights reserved. Various trademarks held by their respective owners.

The bottom tab shows the "Change Your Password" page for the user "keerthi@kiot.ac.in". The page includes fields for "New Password" and "Confirm New Password", both marked as "Good" and "Match". It also includes a "Security Question" field set to "What is your pet's name?" and an "Answer" field containing "jd". A "Change Password" button is present at the bottom.

Below the browser window, the Windows taskbar is visible, showing the Start button, a search bar, pinned icons for File Explorer, Task View, Google Chrome, Microsoft Edge, and File Explorer, and system status indicators for battery level, signal strength, and weather (30°C, Mostly sunny). The date and time are listed as 10/3/2023 12:43 PM.

salesforce login - Search | Login | Salesforce

https://login.salesforce.com

Scale service with Generative AI and Einstein GPT.

Learn how AI and Einstein GPT are bringing intelligence and efficiency to service.

WATCH ON-DEMAND WEBINAR

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Type here to search

Schema Builder | Users | Salesforce | Finish resetting | Lightning Experience | Lightning Experience | New Tab | Login | Salesforce

kiot-3f-dev-ed.develop.lightning.force.com/one/one.app#eyJhb21wb25lbnREZWYiOijtYXJrdXA6Ly9vbmU6bm9OYXZjdGVtcylsmF0dHJpYnV0ZXMIOnsicmVzZ... 1:51 PM 10/3/2023

Sales No Items

Search...

Jaya A
kiot-3f-dev-ed.develop.my.salesforce.com
Settings Log Out

USERNAMES

2k20it52@kiot.ac.in
kiot-3f-dev-ed.develop.my.salesforce.com

DISPLAY DENSITY

✓ Comfy
Compact

OPTIONS

Switch to Salesforce Classic | Add Username

Well, this is awkward. This app doesn't have any navigation items, or you can't access them.
Learn More about how to personalize your navigation bar, or ask your admin for help.

Type here to search

30°C Mostly sunny 2:13 PM 10/3/2023

The screenshot shows a web browser window with two tabs open:

- Schema Builder | Salesforce**
- Home | Salesforce**

The **Home | Salesforce** tab is active and displays a feed for user **Jaya A**. The feed shows a recent update from **Jaya A** (4m ago) stating "A blank value to bank". There is a comment section below the update.

Below the browser, a Windows taskbar is visible with the following pinned icons:

- Type here to search
- Profiles | Salesforce
- about:blank#blocked
- Insufficient Privileges Errors

The system tray shows the date and time as 10/3/2023, 2:45 PM.

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

- Setup** is selected in the top-left corner.
- Profiles** is the active page under the **SETUP** header.
- Clone Profile** sub-page is displayed.
- Enter the name of the new profile.** (Text input field)
- You must select an existing profile to clone from.** (Text)
- Existing Profile:**
- User License:**
- Profile Name:**
- Save** and **Cancel** buttons at the bottom of the form.

The system tray shows the date and time as 10/3/2023, 3:05 PM.

Salesforce Setup - Profiles | Salesforce

about:blank#blocked Insufficient Privileges Errors

kiot-3f-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000nnGK%3Fsetupid%3DEnhancedProfiles

Search Setup

Setup Home Object Manager

Q pr

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Profile

salesmanager1

Profile Detail

Name	salesmanager1	Edit	Clone	Delete	View Users
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>			
Description					
Created By	KEERTHIKA G	03/10/2023, 3:06 pm	Modified By	KEERTHIKA G	03/10/2023, 3:06 pm

Page Layouts

Standard Object Layouts	Global	Global Layout [View Assignment]	Operating Hours	Operating Hour Layout [View Assignment]
Email Application	Not Assigned	[View Assignment]	Order	Order Layout [View Assignment]
Home Page Layout	Home Page Default		Order Product	Order Product Layout

Type here to search

3:06 PM 10/3/2023

Salesforce Setup - Profiles | Salesforce

about:blank#blocked Insufficient Privileges Errors

kiot-3f-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000nnGK%3Fsetupid%3DEnhancedProfiles

Search Setup

Setup Home Object Manager

Q pr

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Profile Edit

salesmanager1

Set the permissions and page layouts for this profile.

Profile Edit

Name	salesmanager1	Save	Save & New	Cancel
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>		
Description				

Custom App Settings

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

Service Provider Access

Type here to search

3:07 PM 10/3/2023

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

- Search Bar:** Search Setup
- Header:** SETUP Profiles | Salesforce
- Left Navigation:**
 - Hyperforce Assistant
 - Users
 - Profiles (selected)
 - Data
 - Mass Transfer Approval Requests
 - Feature Settings
 - Data.com
 - Prospector Preferences
 - Prospector Users
 - Functions
 - Marketing
 - Lead Processes
 - Sales
 - Products
 - Asset Settings
- Main Content:**
 - Profiles:** A table showing permissions for Contact Point Addresses, Contact Point Consents, Contact Point Emails, Sellers, Streaming Channels, and User External Credentials.
 - Custom Object Permissions:** A table showing permissions for books, Child_Objects__c, and Colleges under Basic Access (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.
 - Password Policies:** Set to None.
- Bottom Navigation:** Type here to search, a taskbar with icons for File Explorer, Task View, Edge, Google Chrome, File Explorer, Task View, Edge, Google Chrome, and a system tray showing 30°C, Mostly sunny, ENG, 3:08 PM, and 10/3/2023.

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

- Header:** Includes the NetSuite logo, a search bar labeled "Search Setup", and various system icons.
- Left Sidebar:** Shows the "Hyperforce Assistant" section with "Users" and "Profiles" selected, and other sections like "Data", "Feature Settings", "Marketing", "Sales", "Products", and "Asset Settings".
- Current Page:** The "Profiles" page under "Object Manager".
- Content Area:** Contains "Session Settings" and "Password Policies".
 - Session Settings:** Session Times Out After is set to "2 hours of inactivity". Session Security Level Required at Login is set to "...None...".
 - Password Policies:** User passwords expire in "90 days". Enforce password history is set to "3 passwords remembered". Minimum password length is "8".
 - Complexity requirement: Must include alpha and numeric characters.
 - Question requirement: Cannot contain password.
 - Maximum invalid login attempts is "10". Lockout effective period is "15 minutes".
 - Obscure secret answers for:
 - Require a minimum 1 day password lifetime:
 - Don't immediately expire links in forgot password emails: [i]

Salesforce Setup - New User

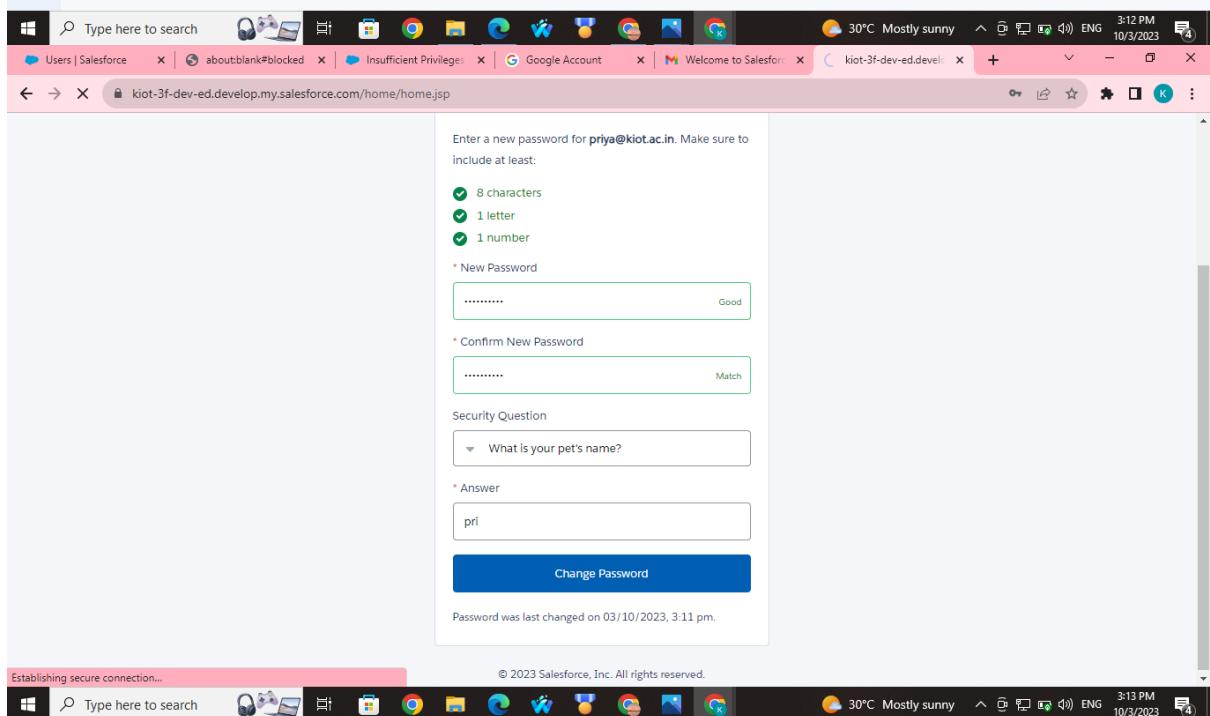
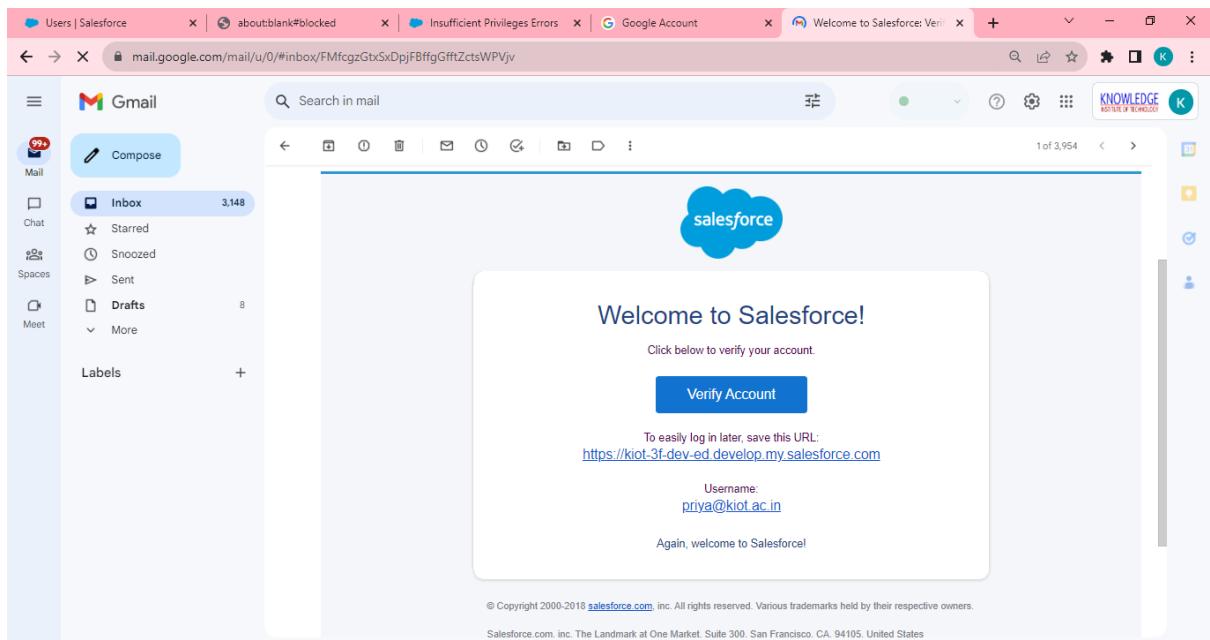
User Edit

General Information

First Name	priya	Role	<None Specified>
Last Name	v	User License	Salesforce Platform
Alias	pv	Profile	salesmanager1
Email	2k20it52@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	priyal@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User1696326047191684899	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>

User Detail

Name	madhu b	Role	Salesforce Platform
Alias	mb	User License	salesmanager
Email	2k20cse179@kiot.ac.in (Verify)	Profile	
Username	2k20cse179@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User16961684242855419206	Marketing User	<input type="checkbox"/>
Title	worker	Offline User	<input type="checkbox"/>
Company	kiot bank	Knowledge User	<input type="checkbox"/>
Department	Sales	Flow User	<input type="checkbox"/>
Division	4/194, aryampalayam, utthamasolapuram .. Paraiakkadu , salem- 636308 Salem TAMIL NADU	Service Cloud User	<input type="checkbox"/>
Address	4/194, aryampalayam, utthamasolapuram .. Paraiakkadu , salem- 636308 Salem TAMIL NADU	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver	Manager	Data.com User Type	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Federation ID		Debug Mode	<input type="checkbox"/>
App Registration: One-Time Password Authenticator		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>



Salesforce Home Page

My College

No Items

Search...

User Profile: priya v
kiot-3f-dev-ed.develop.my.salesforce.com
Settings Log Out

USERNAMES

2k20it52@kiot.ac.in
kiot-3f-dev-ed.develop.my.salesforce.com

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic ⓘ
Add Username

Well, this is awkward. This app doesn't have any navigation items, or you can't access them.
Learn More about how to personalize your navigation bar, or ask your admin for help.

Windows Taskbar: Type here to search, 30°C Mostly sunny, 3:14 PM 10/3/2023

Salesforce Setup Page

Setup Home Object Manager

Search Setup

Permission Sets

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Permission Sets

Help for this Page ⓘ

All Permission Sets Clone

Permission Set Label	Description	License
Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License
Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
Order Management Shopper	Limited access to Order Management features for Self S...	Lightning Order Management User
Order Management Store Associate	Access to limited features enabled by Order Management	Lightning Order Management User
Queue Manager	Lets users create, read, edit, and delete queued parties ...	Queue Manager

1-25 of 29 ⏪ ⏩ Previous Next Page 1 of 2

Windows Taskbar: Type here to search, 30°C Mostly sunny, 3:24 PM 10/3/2023

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:

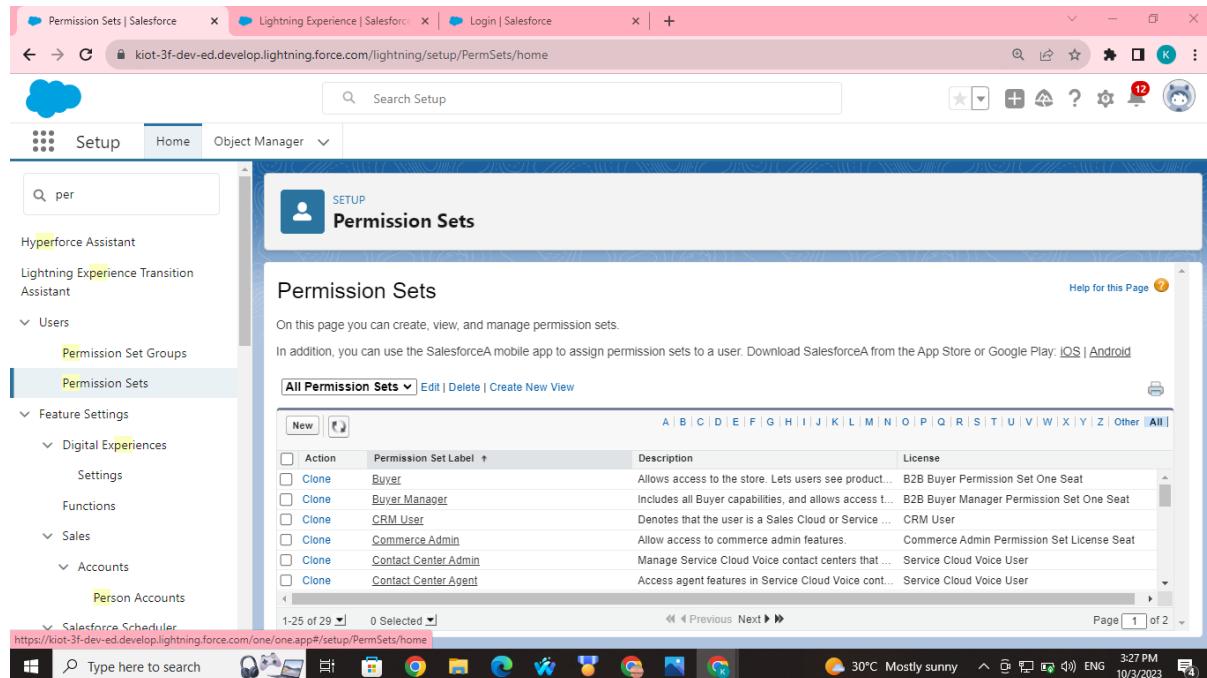
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

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 navigation includes 'Setup', 'Home', 'Object Manager', and sections for 'Hyperforce Assistant', 'Lightning Experience Transition Assistant', 'Users', 'Permission Set Groups', 'Permission Sets' (which is selected), 'Feature Settings', 'Digital Experiences', 'Sales', 'Accounts', 'Person Accounts', and 'Salesforce Scheduler'. The main content area displays a table titled 'Permission Sets' with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists several permission sets, such as 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', and 'Contact Center Agent'. At the bottom of the table, there are pagination controls for '1-25 of 29' and '0 Selected'.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone	Buyer	Allows access to the store. Lets users see product...
<input type="checkbox"/>	Clone	Buyer Manager	Includes all Buyer capabilities, and allows access t...
<input type="checkbox"/>	Clone	CRM User	Denotes that the user is a Sales Cloud or Service ...
<input type="checkbox"/>	Clone	Commerce Admin	Allow access to commerce admin features.
<input type="checkbox"/>	Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that ...
<input type="checkbox"/>	Clone	Contact Center Agent	Access agent features in Service Cloud Voice cont...

Permission Sets | Salesforce Lightning Experience | Salesforce Login | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Search Setup

PER

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

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.

Save Cancel

Help for this Page

Type here to search

Permission Sets | Salesforce Lightning Experience | Salesforce Login | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j0000089JPC%3FsfclFrameOrigin%3Dhttps%253A%252F%252F

Search Setup

PER

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Permission Set salesmanager1

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	Namespace Prefix
Licenses	salesmanager1	
Session Activation Required		Created By KEERTHIKA.G 03/10/2023, 3:28 pm
Last Modified By	KEERTHIKA.G 03/10/2023, 3:28 pm	

Video Tutorial | Help for this Page

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 fab availability

3:27 PM 3:28 PM 10/3/2023

Permission Sets | Salesforce Permission Sets | Salesforce Lightning Experience | Salesforce Login | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j0000089JPC%3Fs%3DEntityPermissions

Setup Home Object Manager

Permission Set salesmanager1

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	--

Video Tutorial | Help for this Page

Type here to search

30°C Mostly sunny 3:39 PM 10/3/2023

Permission Sets | Salesforce Permission Sets | Salesforce Lightning Experience | Salesforce Login | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j0000089JPC%3Fs%3DEntityPermissions%26o%3D01l5j000003...

Setup Home Object Manager

Permission Set salesmanager1

Object Settings

books

Tab Settings

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

Object Permissions

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

Video Tutorial | Help for this Page

Type here to search

30°C Mostly sunny 3:40 PM 10/3/2023

Permission Sets | Salesforce Permission Sets | Salesforce Lightning Experience | Salesforce Login | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP55j0000089jPC%2Fe%3Fs%3DentityPermissions%26o%3D0115j00...

Setup Home Object Manager

Permission Sets

Profiles Public Groups Queues Roles User Management Settings Users

> Data > Email

PLATFORM TOOLS > Subscription Management > Apps > Feature Settings > Slack > MuleSoft > Einstein

Type here to search

SETUP Permission Sets

Available Visible

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"/>

Object Permissions

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

Field Permissions

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

30°C Mostly sunny 3:40 PM ENG 10/3/2023

Permission Sets | Salesforce Permission Sets | Salesforce Lightning Experience | Salesforce Login | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/PermSets/OP55j0000089jPC/PermissionSetAssignment/home

Setup Home Object Manager

Permission Sets

Profiles Public Groups Queues Roles User Management Settings Users

> Data > Email

PLATFORM TOOLS > Subscription Management > Apps > Feature Settings > Slack > MuleSoft > Einstein > Objects and Fields > Events > Process Automation > User Interface

Type here to search

... > SETUP > PERMISSION SET 'SALESMANAGER1'

salesmanager1

Current Assignments

Add Assignment

No assignments defined.

30°C Mostly sunny 3:41 PM ENG 10/3/2023

Permission Sets | Salesforce Permission Sets | Salesforce Lightning Experience | Salesforce Login | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/PermSets/OP55j0000089jPC/PermissionSetAssignment/new

Setup Home Object Manager Search Setup

PERMISSION SET SALESMANAGER1 > MANAGE ASSIGNMENT EXPIRATION salesmanager1

Select Users to Assign

All Users

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00d5j00000dbcxeah.mgsifg3o3la@chatter.salesforce.com	Chatter Free User	✓	
Integration User	integ	integration@00d5j00000dbcxeah.com	Analytics Cloud Integration User	✓	
Jaya A	ja	keerthi@kiot.ac.in	Partner App Subscription User	✓	
KERTHIKA G	KG	2k20h52@kiot.ac.in	System Administrator	✓	
priya v	pv	priya@kiot.ac.in	salesmanager1	✓	
Security User	sec	insightssecurity@00d5j00000dbcxeah.com	Analytics Cloud Security User	✓	

Cancel Next

Type here to search 30°C Mostly sunny 3:41 PM 10/3/2023

Permission Sets | Salesforce Permission Sets | Salesforce Lightning Experience | Salesforce Login | Salesforce

kiot-3f-dev-ed.lightning.force.com/lightning/setup/PermSets/OP55j0000089jPC/PermissionSetAssignment/new

Setup Home Object Manager Search Setup

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date Time Zone Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
priya v		salesmanager1	✓	Salesforce Platform	Never Expires

Cancel Back Assign

Type here to search 30°C Mostly sunny 3:43 PM 10/3/2023

The screenshot shows the Salesforce Setup interface. In the center, a modal window titled "Assignment Summary" displays a table with one row. The table has columns: Full Name, User License, Expires On, Time Zone, and Status. The data in the table is:

Full Name	User License	Expires On	Time Zone	Status
priya v	Salesforce Platform			Success

A green success message at the top of the modal states "1 assignments were successful." The background of the Setup interface shows a sidebar with various management options like Profiles, Public Groups, Queues, Roles, and User Management Settings.

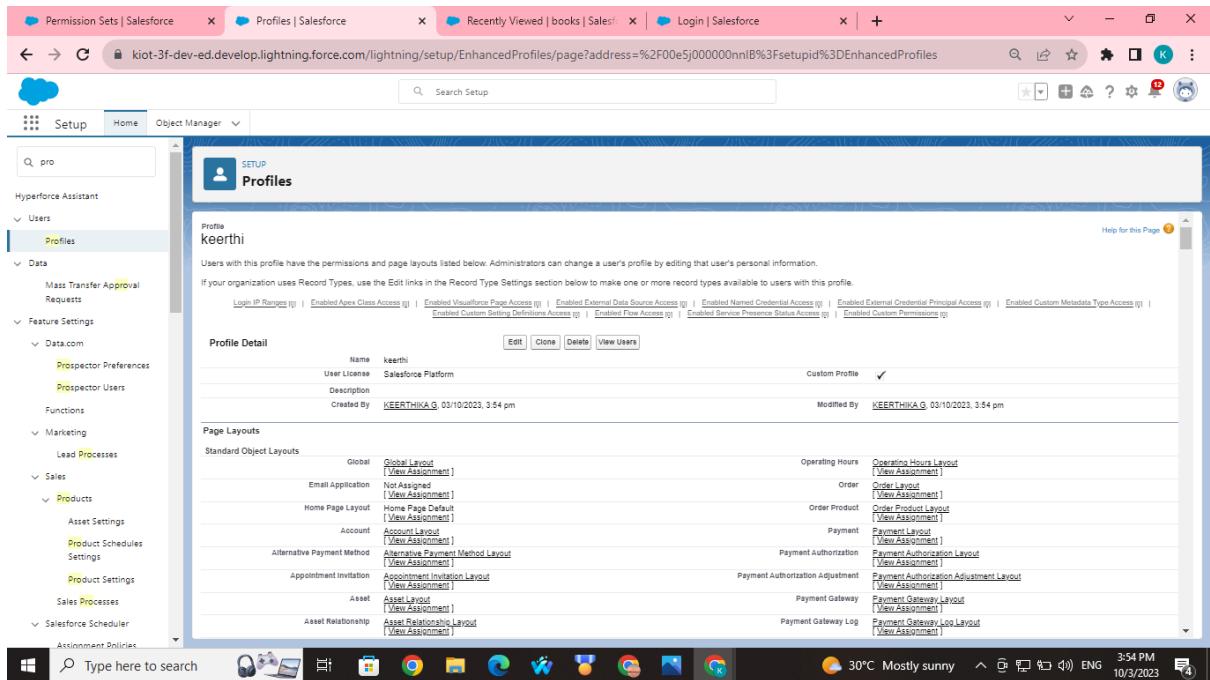
The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes "Salesforce Chatter", "Home", "Chatter", "People", "Groups", "Files", and "books". The main content area is titled "Recently Viewed" under the "books" category. It displays a message: "You haven't viewed any books recently. Try switching list views." There is a search bar at the top and a toolbar with "New", "Import", and "Change Owner" buttons.

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:

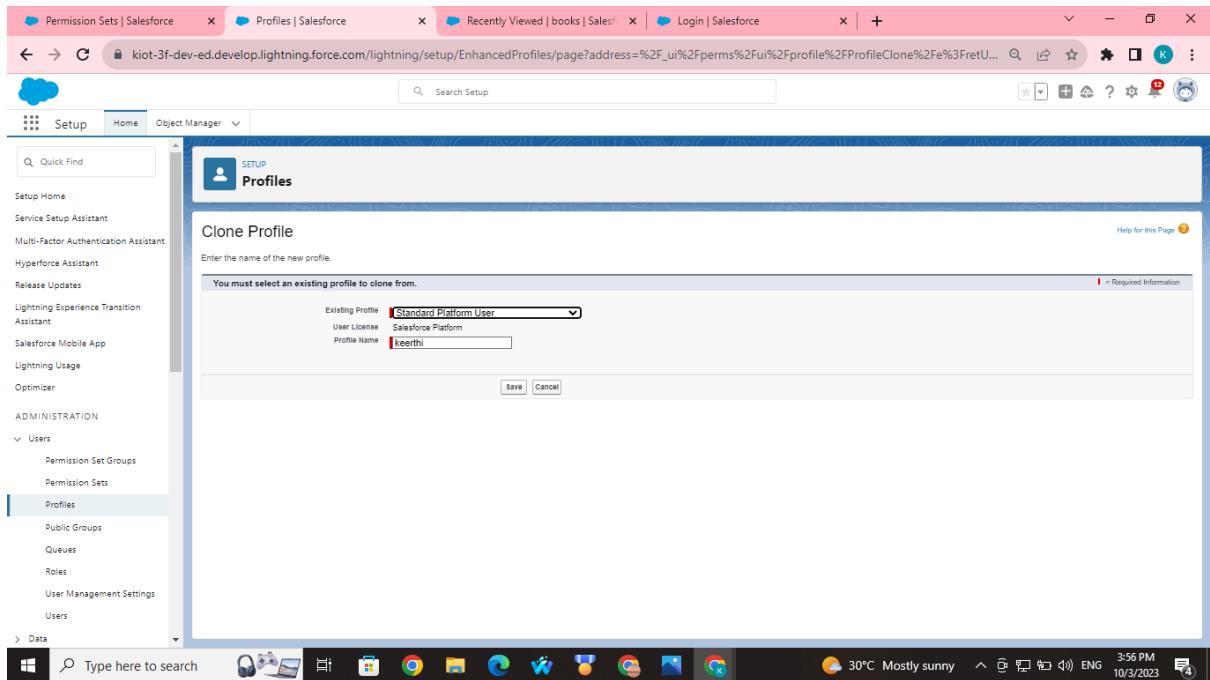
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

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



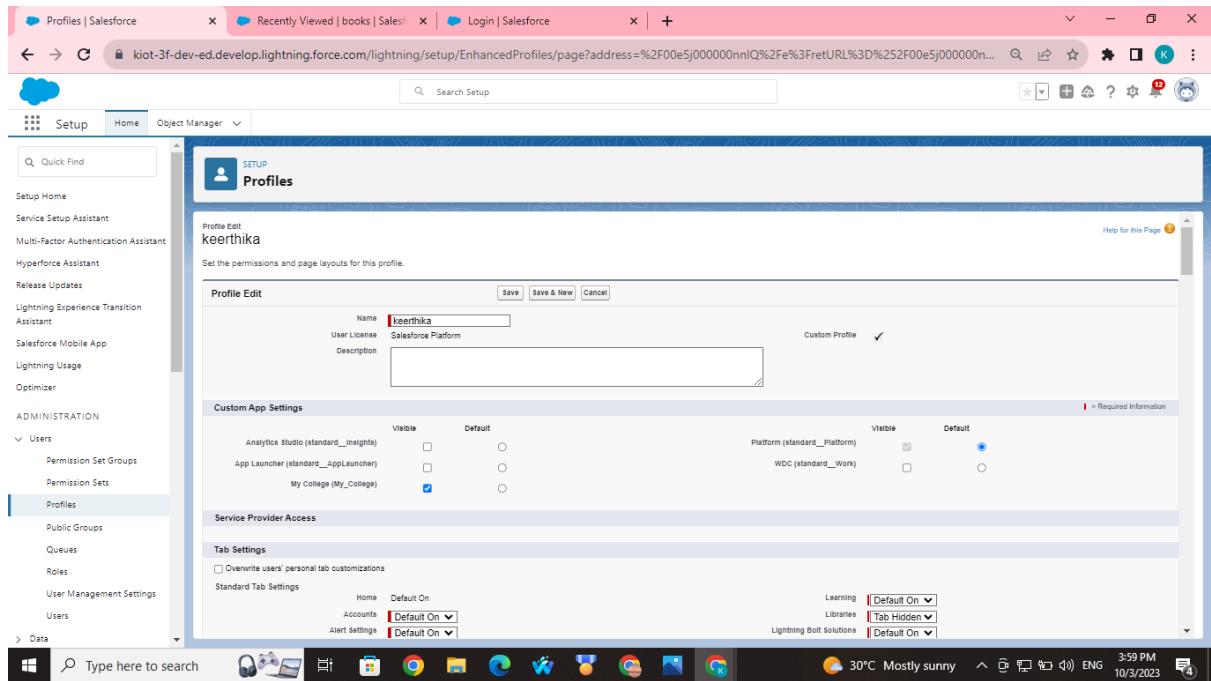
Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.

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.

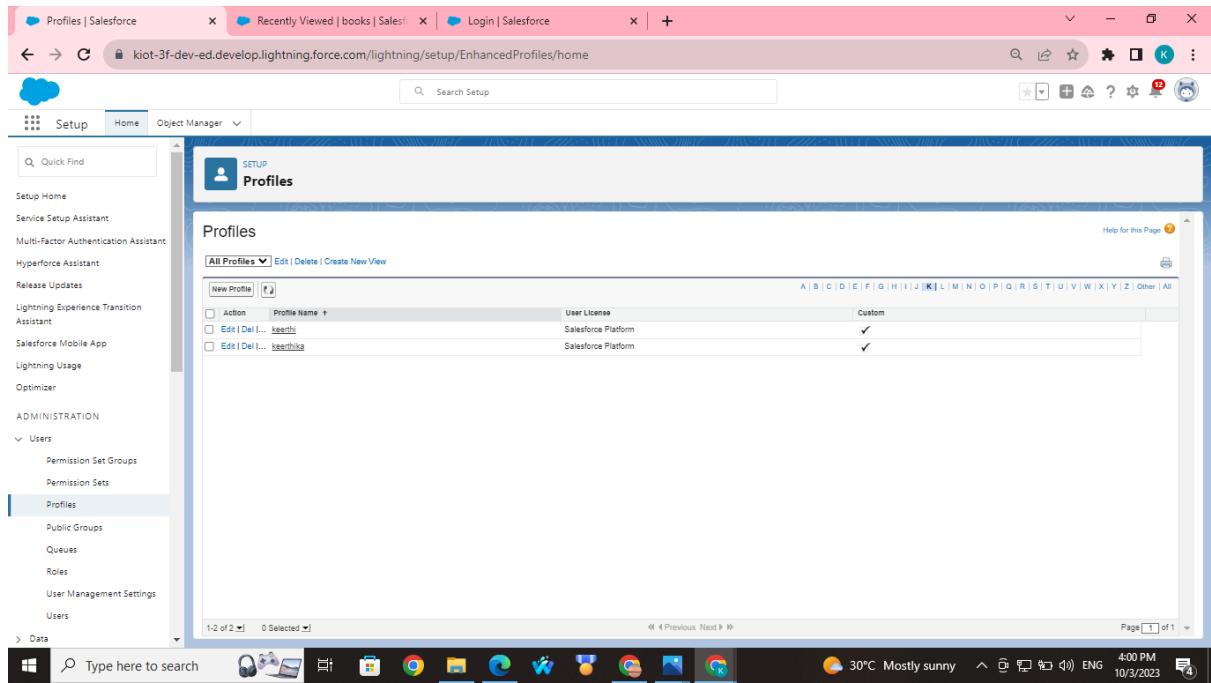
The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, there's a sidebar with links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. Under Administration, the 'Users' section is expanded, showing Profile Set Groups, Permission Sets, and Profiles. The 'Profiles' link is selected. The main content area is titled 'Profiles' and shows a profile for 'keerthika'. It includes a 'Profile Detail' section with fields for Name (keerthika), User License (Salesforce Platform), Description, Created By (KEERTHIKA_G), and Modified By (KEERTHIKA_G). Below this is a 'Page Layouts' section for Standard Object Layouts, listing various global and specific layouts for objects like Account, Alternative Payment Method, and Asset. Each layout has a 'View Assignment' link.

This screenshot continues from the previous one, showing the 'Standard Object Permissions' section. It lists various objects such as Accounts, Assets, Authorization Forms, Authorization Form Data Uses, Authorization Form Texts, Background Operations, Business Brands, Communication Subscriptions, Communication Subscription Channel Types, Communication Subscription Consents, and Communication Subscription Timings. For each object, there are two sets of checkboxes: 'Basic Access' (Read, Create, Edit, Delete, View All, Modify All) and 'Data Administration' (View Encrypted Data, View My Team's Dashboards, Waive Multi-Factor Authentication for Exempt Users). The checkboxes are currently all unchecked.



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



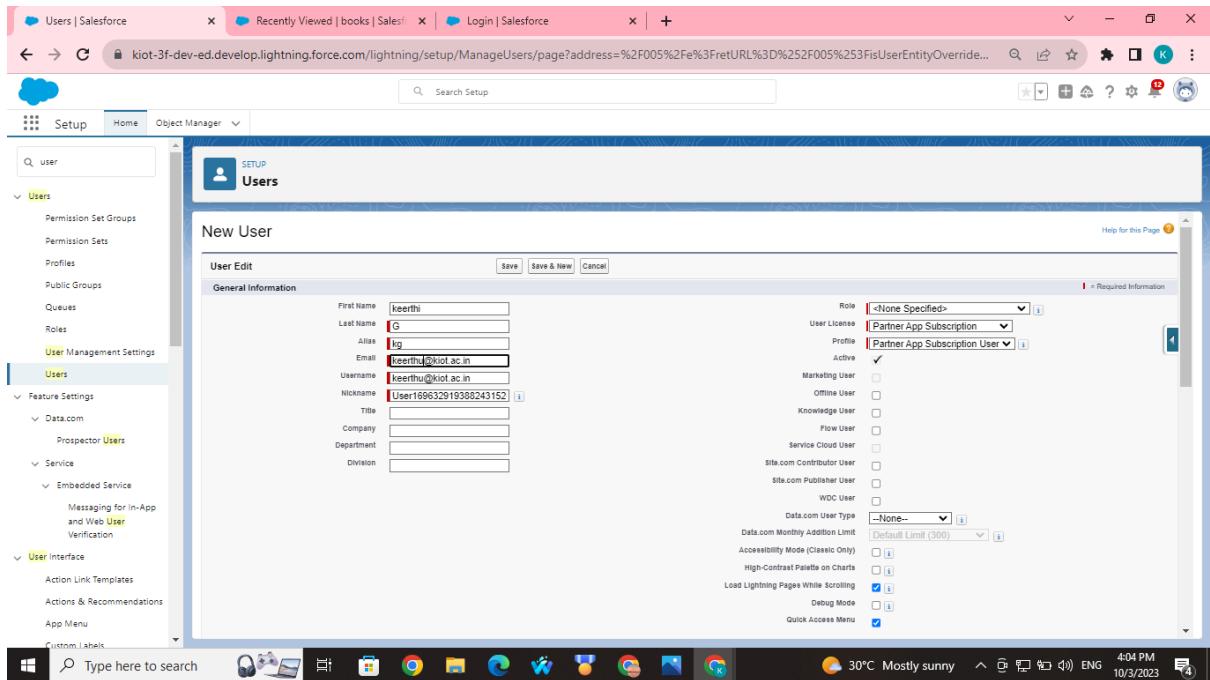
Step 5:

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.

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. The 'All Users' page is displayed, listing several users with their full names, aliases, usernames, roles, and profiles. The user 'A.Jaga' is currently selected, as indicated by a blue border around the row. Other users listed include 'Chatter Expert', 'S.KEERTHIKA', 'User_Integration', 'User_Security', and 'X.0DVA'. The interface includes a sidebar with navigation links for User Management Settings, Feature Settings, Data.com, Service, and User Interface. The bottom of the screen shows the Windows taskbar with various pinned icons and system status information.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A.Jaga	ia	keerthi@kiot.ac.in		<input checked="" type="checkbox"/>	Partner App Subscription User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5f00000dbcxveah.msf4fe3o3ia@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	S.KEERTHIKA	KG	2k20t42@kiot.ac.in		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5f00000dbcxveah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	ses	insightssecurity@00d5f00000dbcxveah.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	X.0DVA	cv	cniva@kiot.ac.in		<input checked="" type="checkbox"/>	salesmanager1

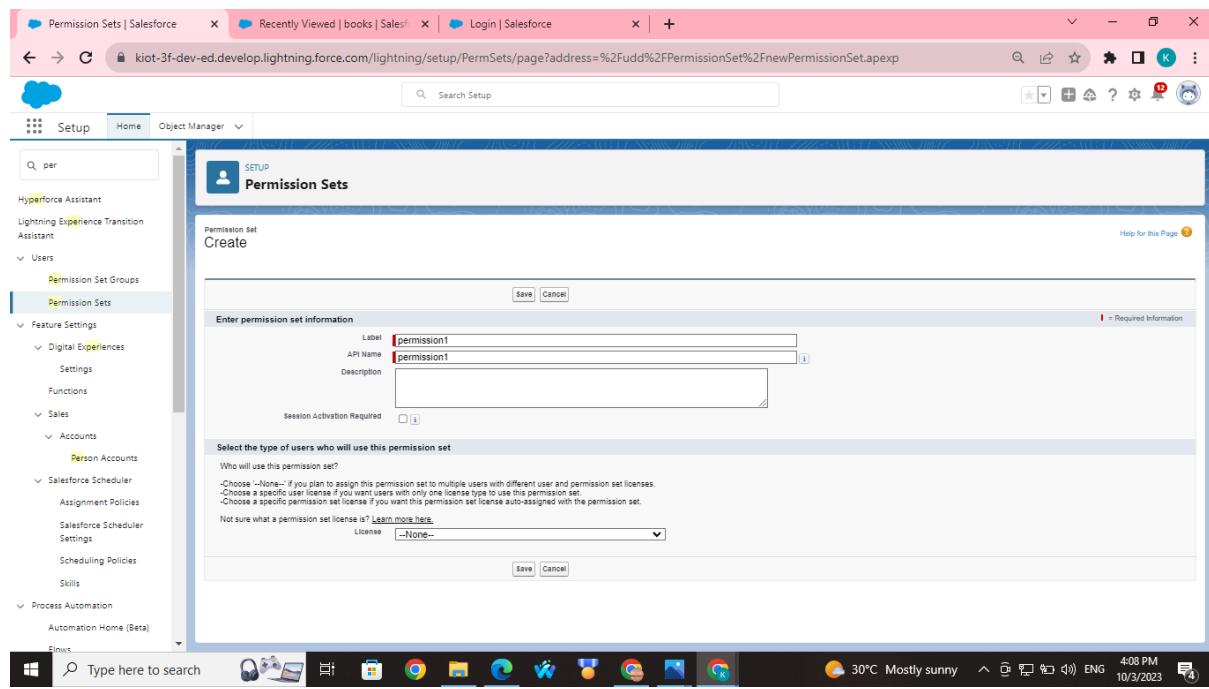


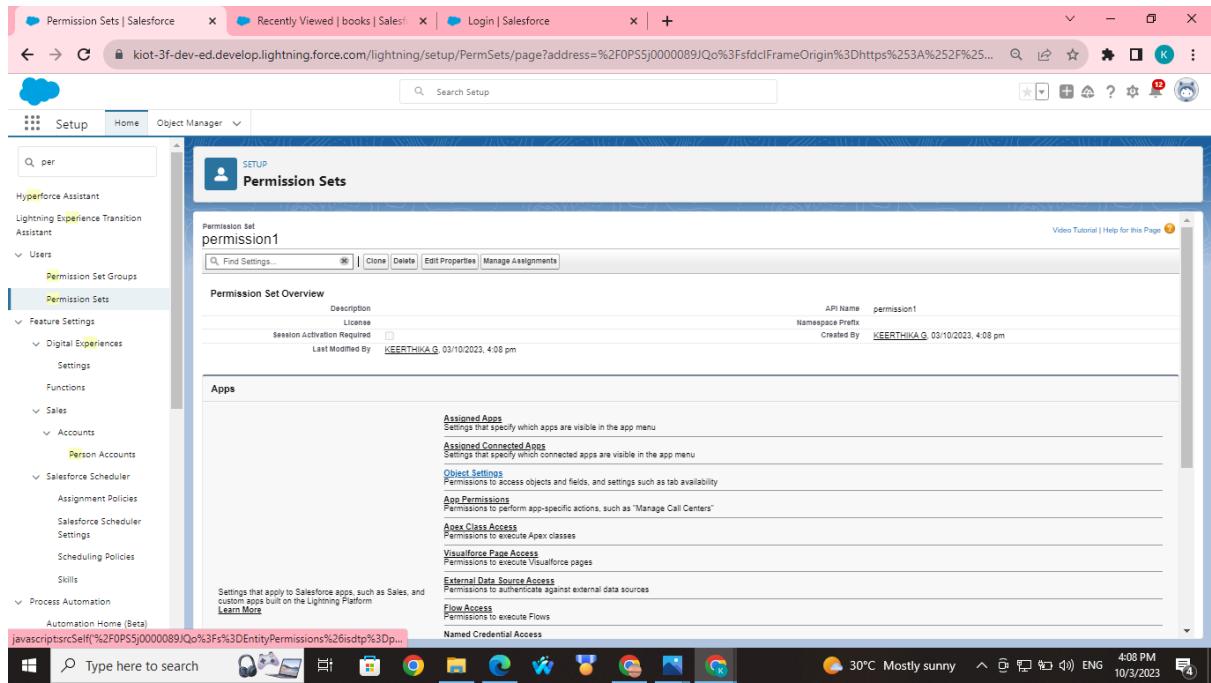
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

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.





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 image contains two screenshots of the Salesforce Setup interface, illustrating the steps to create and manage a Permission Set.

Screenshot 1 (Top): Shows the 'Permission Sets' page for 'permission1'. The 'Object Permissions' section is displayed, listing permissions for 'Accounts': Read, Create, Edit, Delete, View All, and Modify All. The 'Edit' button is visible at the top right of this section. The status bar at the bottom shows the URL: <https://kiot-3f-dev-ed.my.salesforce.com/one/one.app#/alohaRedirect/PS5j0000089jQo%2Fe%3Fs%3DEntityPermissions%26o%3DAccount>.

Screenshot 2 (Bottom): Shows the same 'Permission Sets' page after changes have been made. The 'Object Permissions' section now shows 'Read', 'Create', 'Edit', and 'Delete' checkboxes checked. The 'Save' and 'Cancel' buttons are visible at the bottom of the section. The status bar at the bottom shows the URL: <https://kiot-3f-dev-ed.my.salesforce.com/one/one.app#/alohaRedirect/PS5j0000089jQo%2Fe%3Fs%3DEntityPermissions%26o%3DAccount>.

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' page in the Salesforce setup. The left sidebar is expanded to show 'Users' and 'Permission Sets'. The main area is titled 'permission1' and shows the 'Current Assignments' section. It features a decorative illustration of a cactus and sun. Below the illustration, a message says 'No assignments defined.' There are buttons for 'Edit', 'Delete', and 'Add Assignment'.

The screenshot shows the 'Select Users to Assign' dialog box. The left sidebar is identical to the previous screenshot. The main area is titled 'All Users' and lists seven users with checkboxes next to their names. The users are:

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty@00d500000dbcoxeah.mgsifg3o3lia@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	Integration@00d500000dbcoxeah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Jaya A	ja	keerthi@kiot.ac.in		<input checked="" type="checkbox"/>	Partner App Subscription User
keerthi G	kg	keerthu@kiot.ac.in		<input checked="" type="checkbox"/>	keerthi
KEERTHIKA G	KG	2k20it52@kiot.ac.in		<input checked="" type="checkbox"/>	System Administrator
priya v	pv	priya@kiot.ac.in		<input checked="" type="checkbox"/>	salesmanager1
Security User	sec	insightssecurity@00d500000dbcoxeah.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

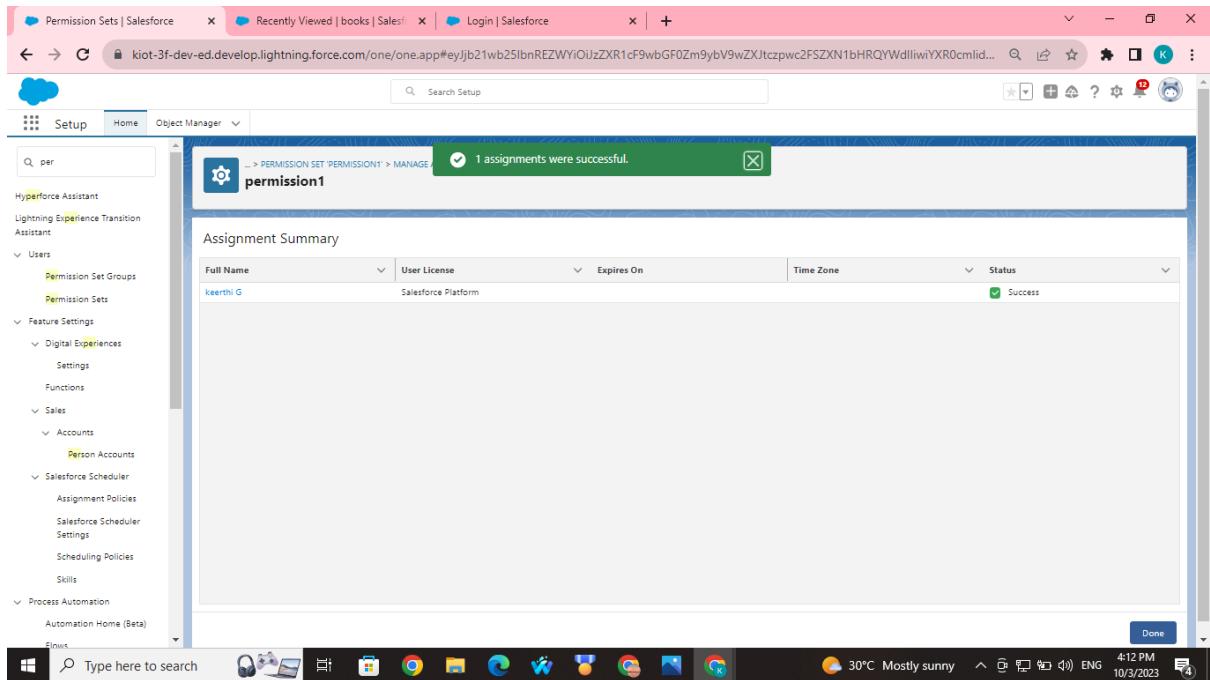
At the bottom of the dialog are 'Cancel' and 'Next' buttons.

The screenshot shows the Salesforce setup interface for assigning permission sets. The left sidebar is the Hyperforce Assistant navigation menu. The main area is titled 'Select Users to Assign' under 'All Users'. A table lists users with checkboxes next to their names. The user 'keerthi G' has a checked checkbox. Other users listed include Chatter Expert, Integration User, Jaya A, KEERTHIKA G, priya v, and Security User. The table includes columns for Full Name, Alias, Username, Role, Active, Profile, and a checkbox column. A 'Next' button is visible at the bottom right.

Click on next.

The screenshot shows the continuation of the permission set assignment process. The left sidebar remains the same. The main area is titled 'Select an Expiration Option For Assigned Users'. It offers two options: 'No expiration date' (selected) and 'Specify the expiration date'. Below this is a table titled 'Selected Users' showing the user 'keerthi G'. The table includes columns for Full Name, Role, Profile, Active, User License, and Expires On. The 'Expires On' column shows 'Never Expires'. A 'Time Zone' dropdown is also present. A 'Back' button and an 'Assign' button are at the bottom right.

Now click on Assign.



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

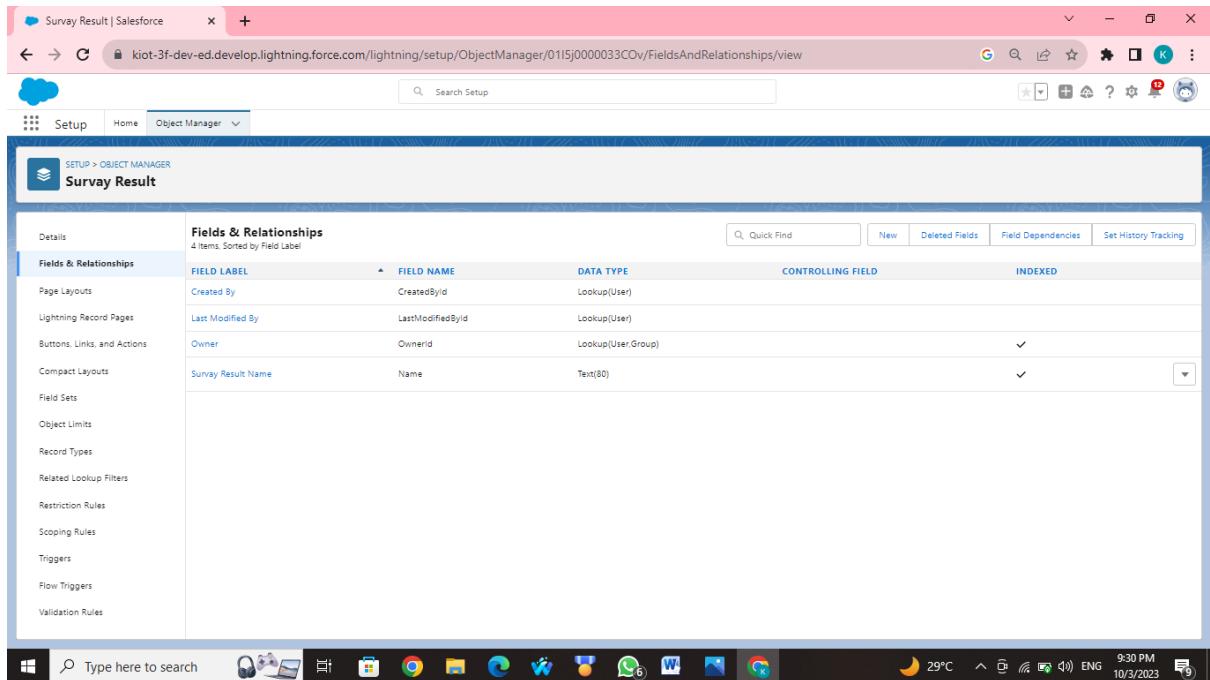
4.Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

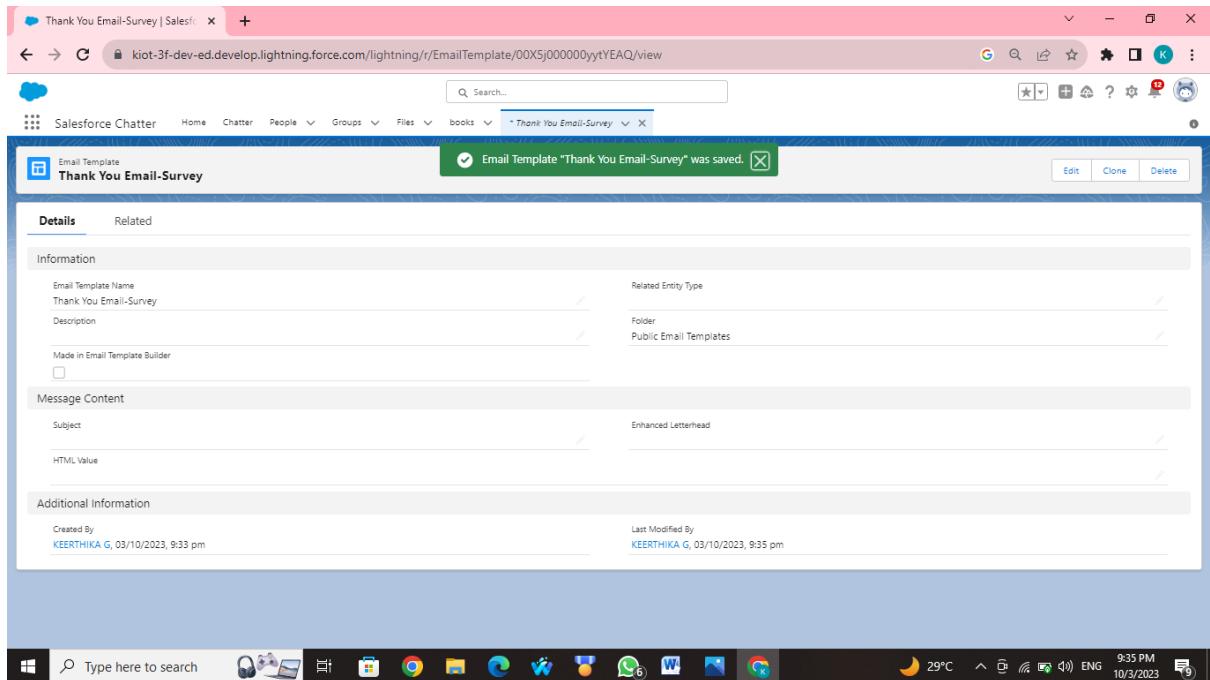
The next step is to create a custom object **Survey Result** and a few custom fields to store survey responses.

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**.



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.**



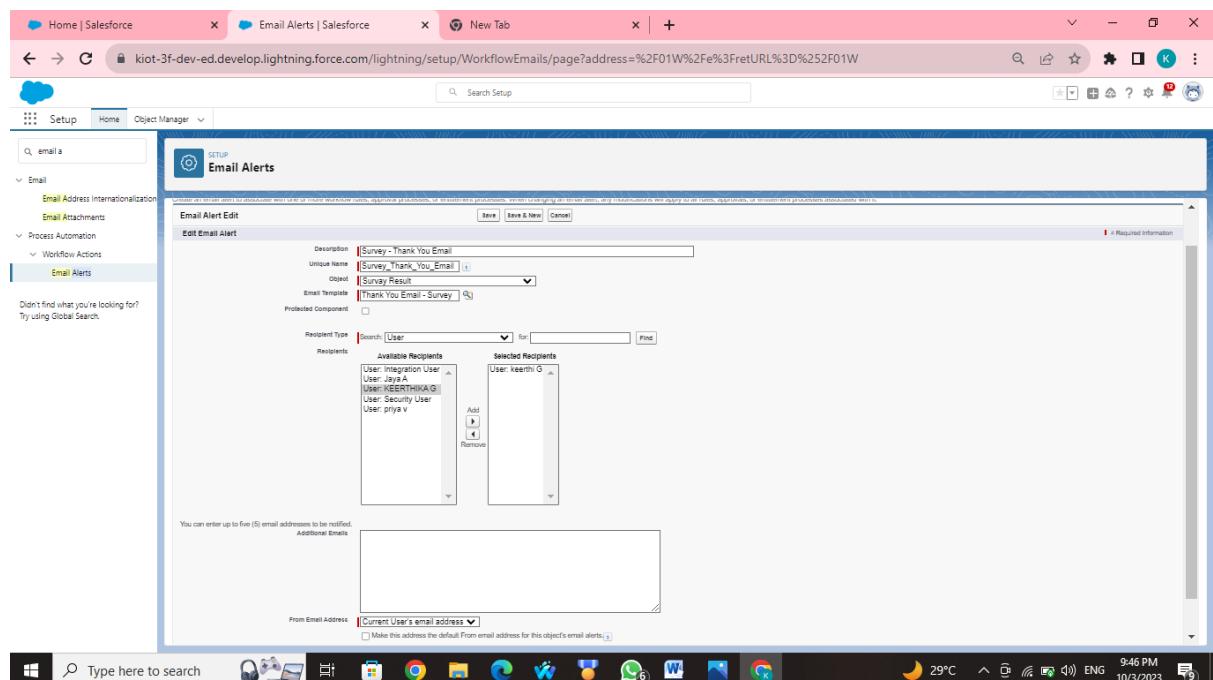
Step 3: Create an Email Alert

- 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.



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	← Aa Comment X
Email__c	← Aa Email > Value X
Name__c	← {!Name.firstName} {!Name.lastName}
Rating__c	← Aa Rating X

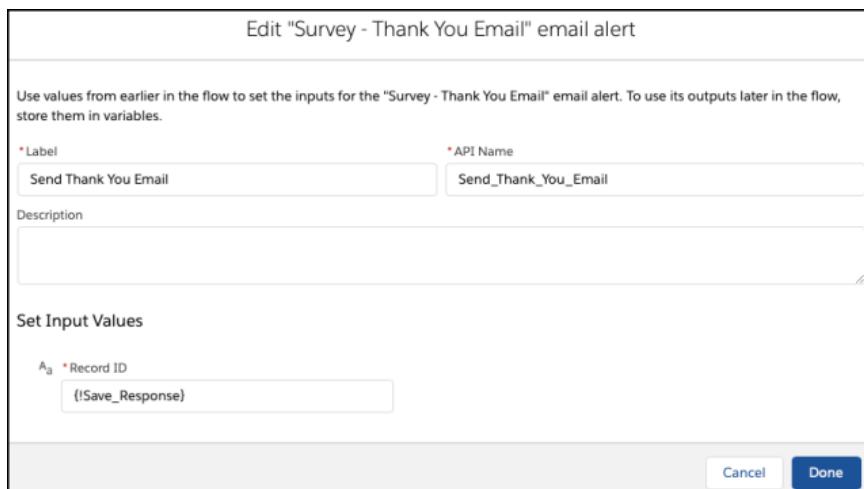
+ Add Field
 Manually assign variables

Cancel Done

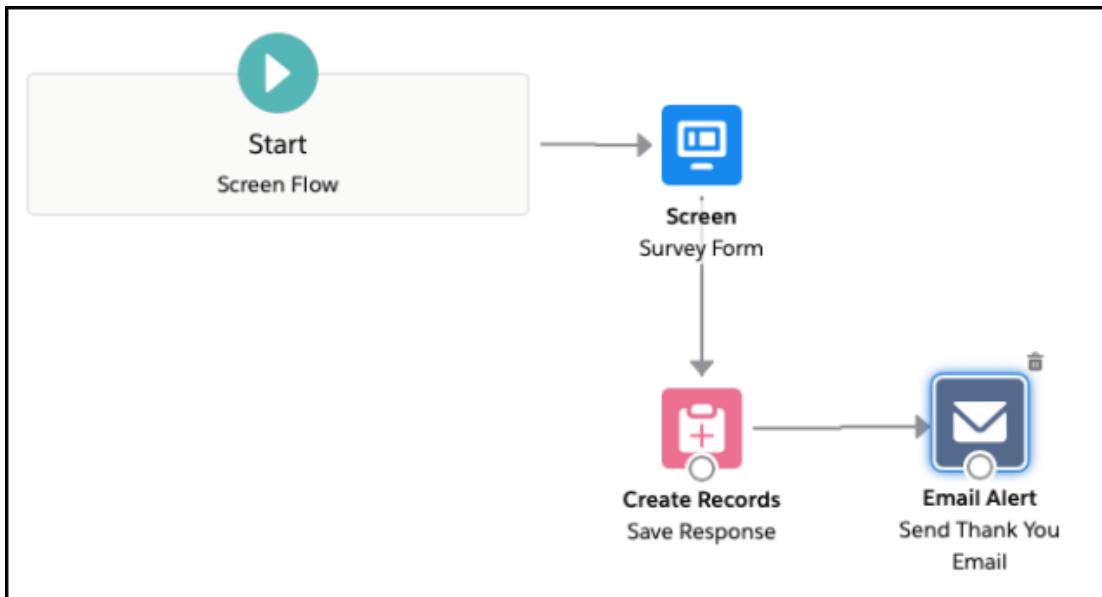
Step 4.3: Salesforce Flow — Call an Acton —
Email Alert to Send Out Thank You Email

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**.



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



1. Click **Save**.
2. Enter **Flow Label** the **API Name** will auto-populate.
3. Click **Show Advanced**.
4. **How to Run the Flow: User or System Context—Depends on How Flow is Launched**
5. Type: **Screen Flow**
6. **API Version for Running the Flow: 51**
7. **Interview Label: Survey {(!\$Flow.CurrentDateTime)}**
8. Click **Save**.

Save as

A New Version A New Flow

* Flow Label Survey * Flow API Name Survey

Description

Hide Advanced

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

* Type Screen Flow

* API Version for Running the Flow 51

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

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

Status: Active Type: Screen Flow Version Number: 2

Cancel Save

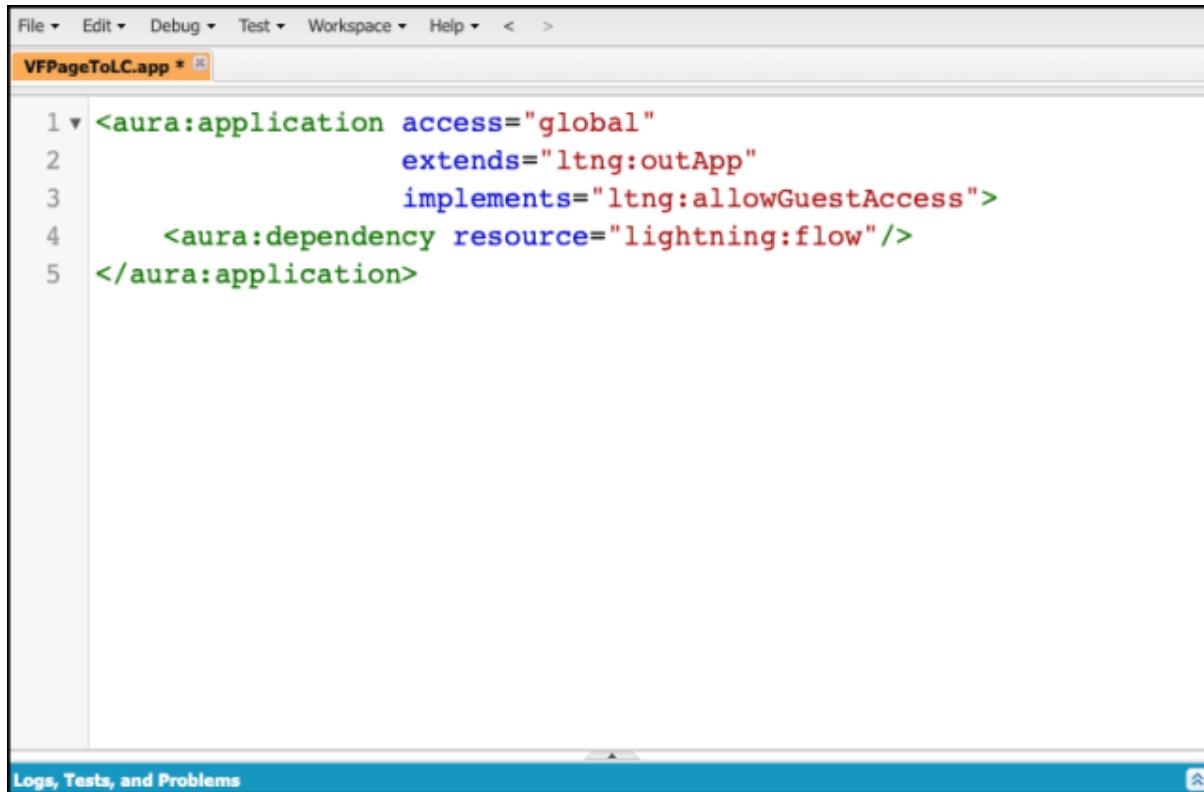
The screenshot shows the 'Save as' dialog for a new flow. The 'A New Version' button is selected. The 'Flow Label' is 'Survey' and the 'Flow API Name' is also 'Survey'. There is a large 'Description' text area which is currently empty. Below that is a 'Hide Advanced' link. Under 'How to Run the Flow', it says 'User or System Context—Depends on How Flow is Launched'. The 'Type' is set to 'Screen Flow'. The 'API Version for Running the Flow' is '51'. In the 'Interview Label' section, there's a placeholder 'Insert a resource...' and a formula 'Survey {!\$Flow.CurrentDateTime}'. At the bottom, it shows the status as 'Active', type as 'Screen Flow', and version number as '2'. There are 'Cancel' and 'Save' buttons at the bottom right.

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 with the following details:

- Toolbar:** File, Edit, Debug, Test, Workspace, Help.
- Code Editor:** The file is named "VFPageToLC.app". The code is as follows:

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

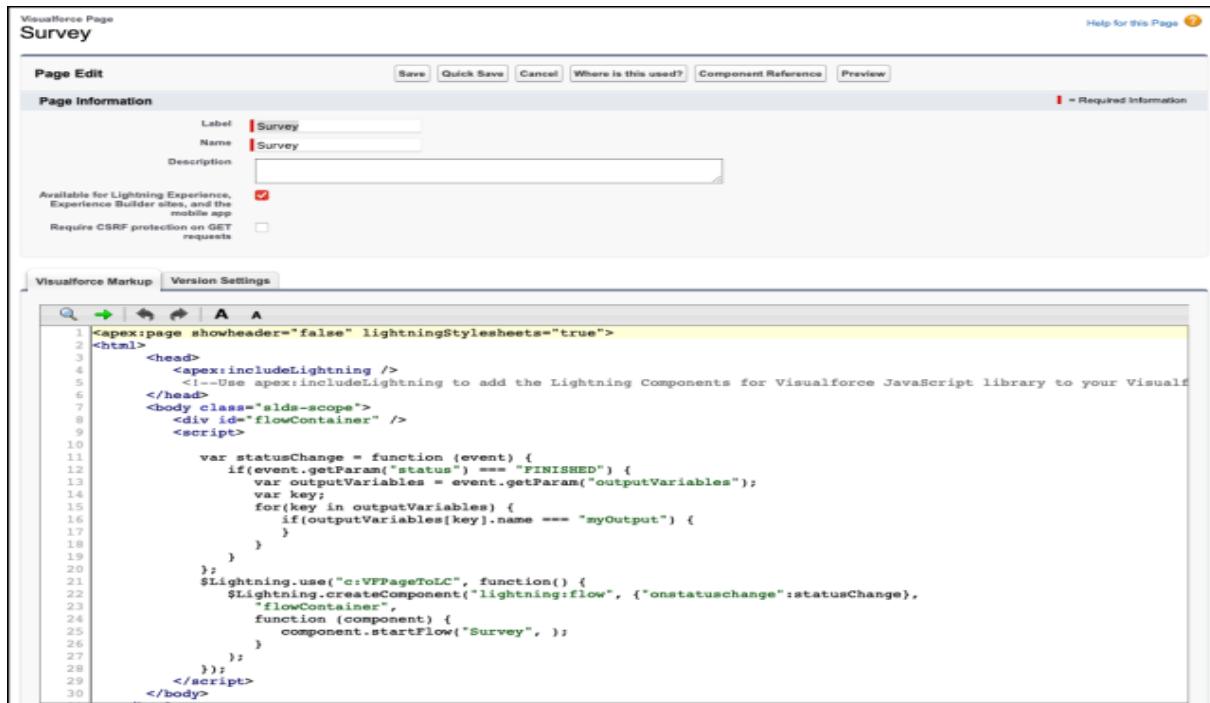
- Logs, Tests, and Problems:** A blue bar at the bottom of the editor window.

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**.



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://katihar-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	<input type="checkbox"/>	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	
Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/>	
Lightning Features for Guest	<input checked="" type="checkbox"/>	
Users	 	
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	<input type="text"/>
*Rating	5
*Comment	Awesome Blog

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

The image shows an email inbox with one unread message. The subject of the email is "Thank You For Completing Our Survey!" from "Survey Site Guest User". The email body contains a greeting, thanks for participating, and a note about sharing results. It is signed off by "Automation Champion".

Thank You For Completing Our Survey! ► Inbox X

 Survey Site Guest User via b9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com
to me 8:09 PM (1 minute ago) Star Reply Forward More

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

Reply Forward