

# **SALESFORCE DEVELOPER (NAAN MUDHALVAN)**

## **ASSIGNMENT 1**

**NAME: NARAYANASWAMY R**

**REG NO: 611220205021**

**DOMAIN: SALESFORCE DEVELOPER**

**BRANCH : B.TECH IT – IV YEAR**

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

Let's say you have two custom objects, "Parent\_Object\_\_c" and "Child\_Object\_\_c," and you want to establish a Master-Detail Relationship from Child\_Object\_\_c to Parent\_Object\_\_c as well as a Roll-Up Summary Field on Parent\_Object\_\_c to track the records that are related to Child\_Object\_\_c.

**Create Custom Objects:** Create the "Parent\_Object\_\_c" custom object if you haven't already.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A sub-menu bar at the top includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'New Custom Object' under 'Custom Object Definition Edit'. The 'Custom Object Information' section contains fields for 'Label' (e.g., 'Account') and 'Plural Label' (e.g., 'Accounts'). It also includes a checkbox for 'Starts with vowel sound'. The 'Object Name' field is set to 'Account'. Below this is a 'Description' text area and a 'Content Name' dropdown set to 'None'. The 'Enter Record Name Label and Format' section includes a 'Record Name' field with 'College Name' as an example and a 'Data Type' dropdown set to 'Text'. The 'Optional Features' section lists several checkboxes for features like 'Allow Reports' and 'Allow Activities'. The 'Object Classification' section has checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has a checkbox for 'Allow Search'. The 'Object Creation Options' section has checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Recently Viewed | Colleges | Sales

College | Salesforce

New Tab

knowledgeinstituteoftech-5c-dev-ed.develop.lightning.force.com/lightning/o/College\_c/list?filterName=Recent

Naan mudhalvan Home Colleges departments

Search...

Recently Viewed

2 Items • Updated a few seconds ago

College Name

1 KSR

2 KIOT

New Import Change Owner



Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tables, lists, reports, and charts.

Singular Label:  Example: Account

Plural Label:  Example: Accounts

Starts with record name:

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

Object Name:  Example: Account

Description:

Content Record Name Label and Format

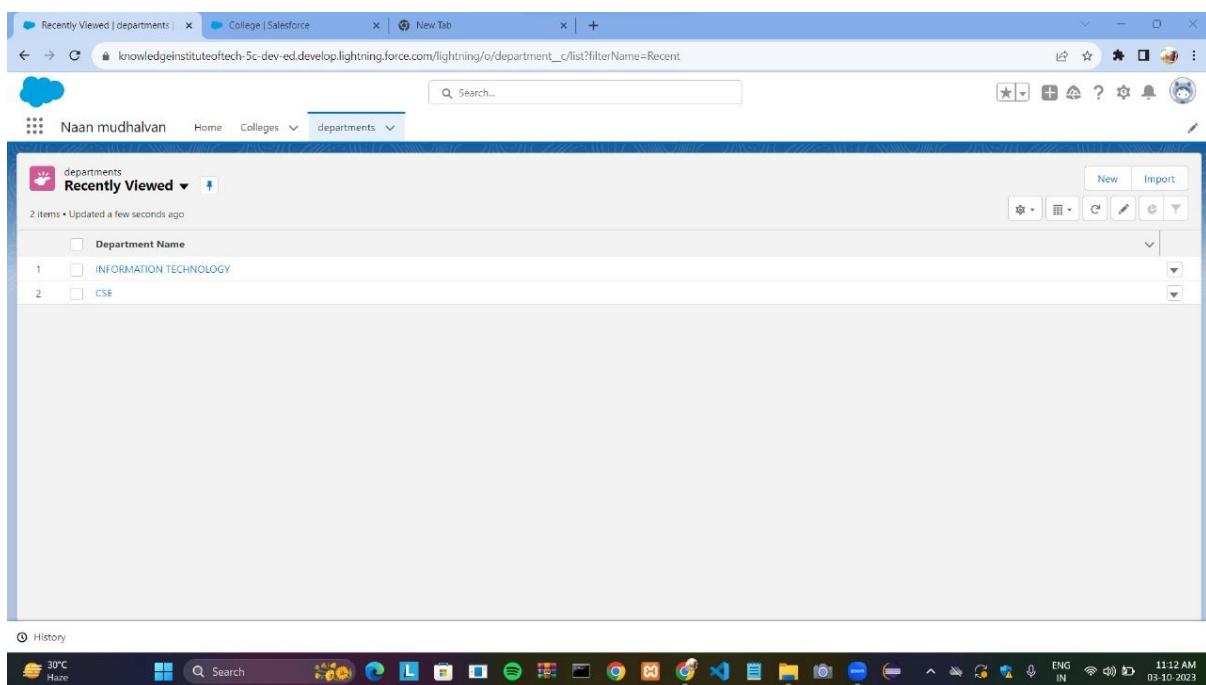
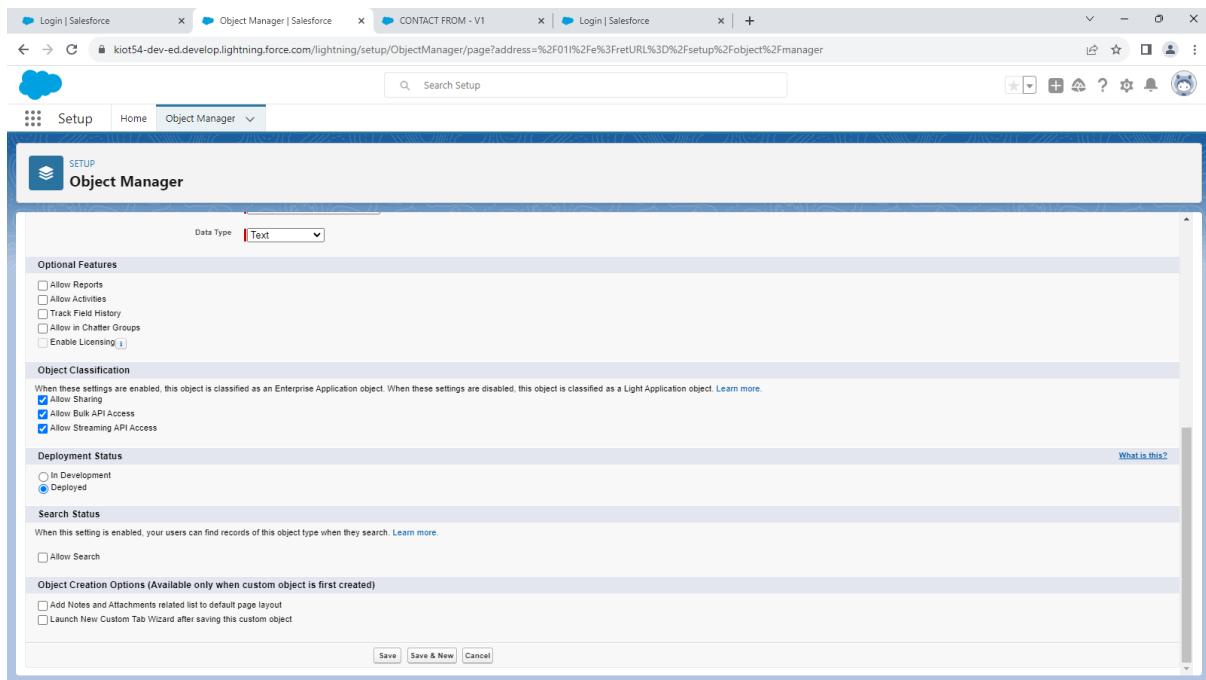
This record name appears in page layouts, reports, and search results. For example, the record name for Account is "Account Name" and for Case is "Case Number". Note that the record name field is always called "Name" when referenced via the API.

Record Name:  Example: Account Name

Date Type:

Optional Features

**Create the "Child\_Object\_\_c" custom object if you haven't already.**



**Establish a master-detail relationship:** - Click "Setup" in the top-right corner by selecting the gear icon.

- 1) Select "Object Manager" from the list of "Objects and Fields."
- 2) To access its options, click "Child\_Object\_\_c".
- 3) Select "New Relationship" under "Fields & Relationships" in the menu.
- 4) Select the "Master-Detail Relationship" relationship type.
- 5) "Parent\_Object\_\_c" should be chosen as the parent object.

6) Give the connection a name that has meaning, such as "Parent Relationship."

7) Click "Next" to complete the process after defining additional settings such as whether they are required or not.

The screenshot shows a web browser window with multiple tabs open. The active tab is titled 'Recently Viewed | departments' and displays a list of recently viewed items under the heading 'Recently Viewed'. The list contains two items: 'INFORMATION TECHNOLOGY' and 'CSE'. The browser's address bar shows the URL: 'knowledgeinstituteoftech-5c-dev-ed.lightning.force.com/lightning/o/department\_c/list?filterName=Recent'. The browser interface includes a search bar, a toolbar with various icons, and a status bar at the bottom showing system information like weather (30°C Haze), date (03-10-2023), and time (11:12 AM).

The screenshot shows the 'New Custom Field' setup in the Salesforce Lightning interface. The left sidebar lists various custom field categories: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The main panel is titled 'Step 1. Choose the field type' and shows the 'Data Type' section. Under 'Master-Detail Relationship', the 'Master-Detail Relationship' option is selected. The 'None Selected' option is also available. Other options like Auto Number, Formula, Roll-Up Summary, and External Lookup Relationship are listed below. A note indicates that the relationship field is required on all detail records. The 'Next' button is visible at the top right of the panel.

TAINER NAME  
New Relationship

Step 4. Establish field-level security for reference field Step 4 of 6

Field Label: TAINER NAME  
Data Type: Master-Detail  
Field Name: TAINER\_NAME  
Description:

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

| Field-Level Security for Profile   | Visible                             | Read-Only                |
|------------------------------------|-------------------------------------|--------------------------|
| Analytics Cloud Integration User   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Analytics Cloud Security User      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Authenticated Website              | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Authenticated Website              | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Contract Manager                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Cross Org Data Proxy User          | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Marketing Profile          | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Sales Profile              | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Support Profile            | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Community Login User      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Community Plus Login User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Community Plus User       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Community User            | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Previous Next Cancel

TAINER NAME  
New Relationship

Step 5. Add reference field to Page Layouts Step 5 of 6

Field Label: TAINER NAME  
Data Type: Master-Detail  
Field Name: TAINER\_NAME  
Description:

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

Add Field: Page Layout Name  
 TAINER NAME Layout

Previous Next Cancel

TAINER NAME  
New Relationship

Help for this Page ?

Details

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers

Step 6. Add custom related lists Step 6 of 6

Field Label TAINER NAME  
Data Type Master-Detail  
Field Name TAINER\_NAME  
Description

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label **TAINER NAMES**

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

Add Related List Page Layout Name  tainer Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

CSE | Department | Salesforce

College | Salesforce

New Tab

Naan mudhalvan Home Colleges departments

Search...

New Contact Edit New Opportunity

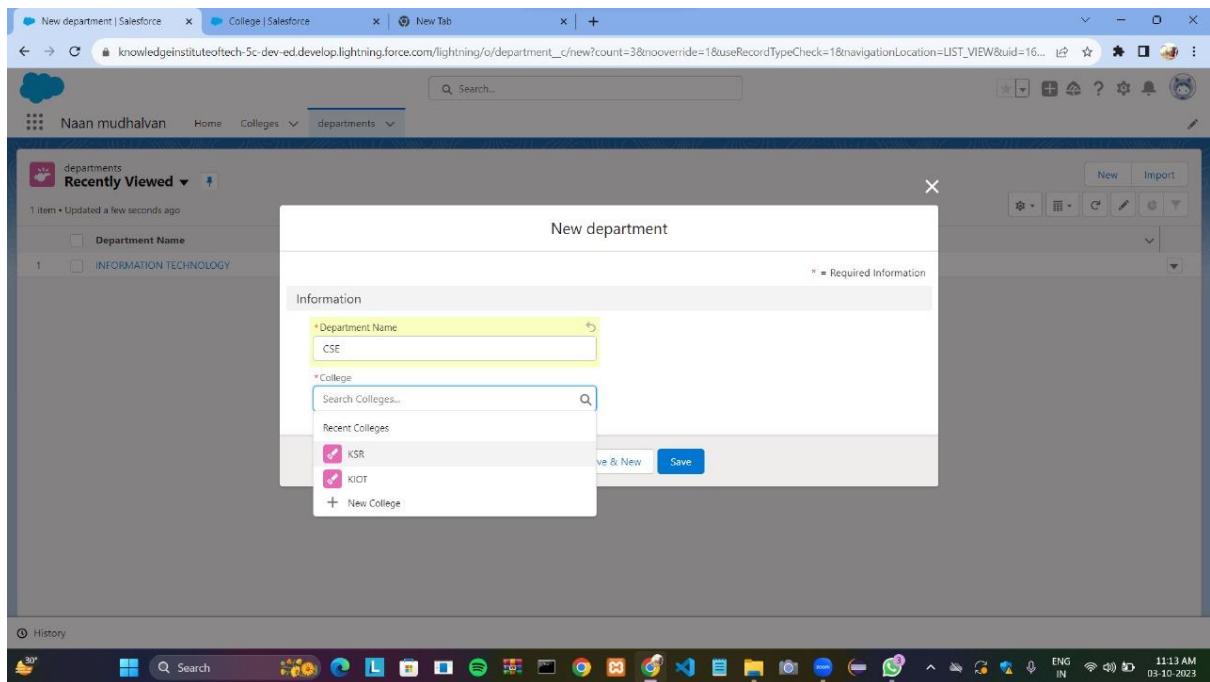
Related Details

Department Name: CSE  
College: IITI

Created By: Naveenkumar S 08/10/2023, 11:13 am

Last Modified By: Naveen kumar S 08/10/2023, 11:13 am

History Search



### Create a field for a roll-up summary:

- 1) Return to the "Parent\_Object\_\_c" settings after building the Master-Detail Relationship.
- 2) Click on "New" under "Fields & Relationships" and choose "Roll-Up Summary."
- 3) Pick the "Child Relationship Name" (made in step 2); an example might be "Child\_Object\_\_r"
- 4) Select the aggregation operation, in this example "Count".
- 5) Create a descriptive field label, such as "Total Child Records".
- 6) Define other field characteristics if desired.
- 7) To construct the Roll-Up Summary Field, click "Next" and then "Save".

college

## New Custom Field

Help for this Page 

**Step 1. Choose the field type**

Step 1

Next Cancel

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

**Data Type**

|  |   |
|--|---|
| <input type="radio"/> None Selected                | Select one of the data types below.   |
| <input type="radio"/> Auto Number                  | A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.  |
| <input type="radio"/> 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.   |
| <input checked="" type="radio"/> 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.  |
| <input type="radio"/> 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.   |
| <input type="radio"/> Master-Detail Relationship   | Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: <ul style="list-style-type: none"> <li>The relationship field is required on all detail records.</li> <li>The ownership and sharing of a detail record are determined by the master record.</li> <li>When a user deletes the master record, all detail records are deleted.</li> <li>You can create rollup summary fields on the master record to summarize the detail records.</li> </ul> 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. |
| <input type="radio"/> External Lookup Relationship | Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.  |
| <input type="radio"/> True/False                   | Allows users to select a True (checked) or False (unchecked) value.   |

Rename Tabs and Labels

Tabs

Help for this Page 

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

## Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

**Custom Object Tabs**

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

**Web Tabs**

New What Is This?

No Web Tabs have been defined.

**Visualforce Tabs**

New What Is This?

No Visualforce Tabs have been defined.

**Lightning Component Tabs**

New What Is This?

No Lightning component tabs have been defined.

**Lightning Page Tabs**

New What Is This?

No Lightning Page Tabs have been defined.

Details college [Help for this Page](#)

### New Custom Field

**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

**Step 5. Add to page layouts** Step 5 of 5

|             |                 |
|-------------|-----------------|
| 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.

|   |                  |
|---|------------------|
| <input checked="" type="checkbox"/> Add Field | Page Layout Name |
| <input checked="" type="checkbox"/>           | college Layout   |

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

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

Details college [Help for this Page](#)

### New Custom Field

**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

**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"/> |
| Contract 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 Subsriptiin User | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

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

college  
New Custom Field

Help for this Page ?

Step 3 of 5

Previous Next Cancel

**Select Object to Summarize**

Master Object: college  
Summarized Object: CDepartments

**Select Roll-Up Type**

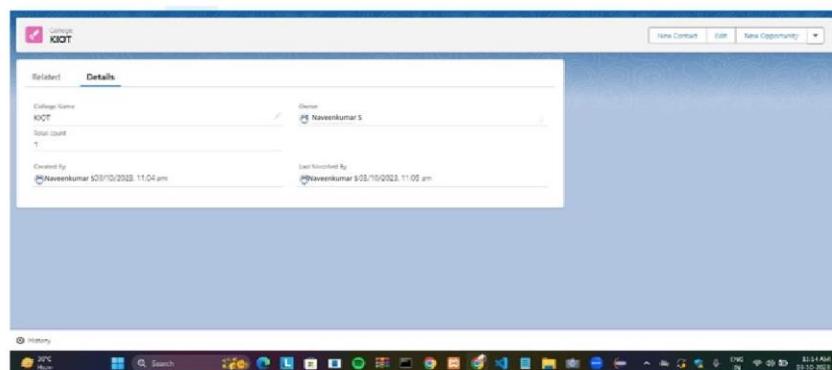
COUNT  
 SUM  
 MIN  
 MAX

Field to Aggregate: None

**Filter Criteria**

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

Previous Next Cancel



**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.**

To create a user in Salesforce, you'll typically need administrator or delegated permissions. Here are the general steps to create a new user:

**Log in to Salesforce:**

- Log in to your Salesforce instance with an account that has administrative privileges.

### **Access the User Setup:**

- Click on your profile picture or the user icon in the top-right corner.
- Select "Setup" from the dropdown menu.

### **Navigate to User Management:**

- In the left-hand sidebar, under "Administer," click on "Users."

### **Create a New User:**

- Click on the "New User" button or link to begin creating a new user.

### **Fill in User Details:**

- Fill in the user's information, such as First Name, Last Name, Email, Username (typically an email address), and Alias (used in reports).
- Assign a Role to the user to determine their access within the role hierarchy.
- Choose a License Type (e.g., Salesforce, Chatter Free, or a specific app license).
- Assign a Profile to the user to determine their permissions and settings.

### **Save the User:**

- Click the "Save" button to create the user.

### **Assign a Password:**

- After saving the user, you'll be prompted to assign a temporary password.
- Communicate this temporary password to the user, who will need to change it upon their first login.

### **Verify User Creation:**

- Log out of your administrator account and log in as the newly created user to ensure they have the expected access and permissions.

All Users

| Action                        | Full Name              | Alias   | Username  | Role | Active                              | Profile                          |
|-------------------------------|------------------------|---------|---|------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> Edit | Chatter Expert         | Chatter | chatty_00d5j00000cirbea3_r6kjemujhch@chatter.salesforce.com |      | <input checked="" type="checkbox"/> | Chatter Free User                |
| <input type="checkbox"/> Edit | G_S_VIGNAYA            | VG_S    | vignaya@naanmudhalvan.com                                   |      | <input checked="" type="checkbox"/> | System Administrator             |
| <input type="checkbox"/> Edit | SaiLappan_User.Vignaya | usall   | vignayavas0@gmail.com                                       |      | <input checked="" type="checkbox"/> | Work.com Only User               |
| <input type="checkbox"/> Edit | SaiLappan_Vignaya      | ysall   | gsvignaya@gmail.com   |      | <input checked="" type="checkbox"/> | Standard Platform User           |
| <input type="checkbox"/> Edit | User_Integration       | integ   | integration@00d5j00000cirbea3.com                           |      | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User_Security          | sec     | insightsecurity@00d5j00000cirbea3.com                       |      | <input checked="" type="checkbox"/> | Analytics Cloud Security User    |
| <input type="checkbox"/> Edit | vignaya_089            | vgun    | sakthivignaya08@gmail.com                                   |      | <input checked="" type="checkbox"/> | Work.com Only User               |
| <input type="checkbox"/> Edit | Vignaya_Sakthi         | sign    | vignayavas@gmail.com  |      | <input checked="" type="checkbox"/> | Standard User                    |

User Edit

General Information

|            |                         |                                      |                                     |
|------------|-------------------------|--------------------------------------|-------------------------------------|
| First Name | Harish                  | Role                                 | Western Sales Team                  |
| Last Name  | S                       | User License                         | Salesforce Platform                 |
| Alias      | hs                      | Profile                              | standard profile -no acct           |
| Email      | 2k20it10@kiot.ac.in     | Active                               | <input checked="" type="checkbox"/> |
| Username   | harish0733962@gmail.com | Marketing User                       | <input type="checkbox"/>            |
| Nickname   | HS                      | Offline User                         | <input type="checkbox"/>            |
| Title      | Account                 | Knowledge User                       | <input type="checkbox"/>            |
| Company    | kiot                    | Flow User                            | <input type="checkbox"/>            |
| Department | sales                   | 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"/>            |
|            |                         | Data.com User Type                   | -None-                              |
|            |                         | Data.com Monthly Addition Limit      | 300                                 |
|            |                         | Accessibility Mode (Classic Only)    | <input type="checkbox"/>            |
|            |                         | High-Contrast Palette on Charts      | <input type="checkbox"/>            |
|            |                         | Load Lightning Pages While Scrolling | <input checked="" type="checkbox"/> |
|            |                         | Debug Mode                           | <input type="checkbox"/>            |
|            |                         | Make Setup My Default Landing Page   | <input type="checkbox"/>            |

There are four ways you can manage record-level access. They are presented in ascending order of access. The most stringent degree of data protection is achieved using the organization-wide settings, and as needed, access is then granted to specific users using the various record-level security measures.

The default level of access that users have to one another's records is defined by organization-wide defaults.

Role hierarchies make guarantee that bosses have access the same information as their subordinates. A user or group of users may require a certain amount of data access, which is represented by each role in the hierarchy.

Sharing rules allow specific user groups access to documents they don't own or ordinarily can't see by automatically deviating from the organization's default settings.

Owners of records can offer read-only and edit access manually.

The screenshot shows the Salesforce All Accounts page. At the top, there are tabs for Service, Home, Chatter, Accounts (which is selected), Contacts, Cases, Reports, Dashboards, Trainers, departments, TAINER NAMES, Books, and a search bar. Below the header is a table with 14 rows of account data. The columns are: Account Name, Account Site, Billing State/Province, Phone, Type, and Account Owner Alias. The accounts listed include Burlington Textiles Corp of America, Dickenson plc, Edge Communications, Express Logistics and Transport, GenePoint, Grand Hotels & Resorts Ltd, HARISH S, Pyramid Construction Inc., Sample Account for Entitlements, sForce, United Oil & Gas Corp., United Oil & Gas, Singapore, United Oil & Gas, UK, and University of Arizona. The Type column shows values like Customer - Direct, Customer - Channel, and Customer - Direct. The Account Owner Alias column shows values like HS, autproc, and various initials.

The screenshot shows the Salesforce Sharing Settings page under the Setup tab. The left sidebar has a search bar and navigation links for Security, Guest User Sharing Rule Access Report, and Sharing Settings (which is selected). The main content area has a title "Sharing Settings" and a subtitle "This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to Background Jobs to monitor the progress of a change to an organization-wide default or a parallel sharing recalculations." It includes a "Manage sharing settings for:" dropdown set to "All Objects" and a "Disable External Sharing Model" button. The "Default Sharing Settings" table is the central focus, titled "Organization-Wide Defaults". It lists various objects (Object) and their corresponding sharing rules (Default Internal Access, Default External Access, and Grant Access Using Hierarchies). The table includes rows for Lead, Account and Contract, Contact, Order, Asset, Opportunity, Case, Campaign, Campaign Member, User, Activity, Calendar, Price Book, and Product. Most objects have "Public Read/Write/Transfer" as the default internal access, while some like Contact, Order, Asset, Opportunity, Case, and Activity have "Controlled by Parent". The "Grant Access Using Hierarchies" column contains checkmarks for most entries.

Role hierarchies ensure managers have access to the same records as their subordinates. Each role in the hierarchy represents a level of data access that a user or group of users needs.

**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.

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 44.0 | Reset Password | Salesforce | Finish update

The screenshot shows the 'Permission Sets' page in the Salesforce Setup. The left sidebar is expanded to show 'Users' and 'Permission Sets'. The main content area displays a table of permission sets with columns for Action, Permission Set Label, Description, and License. The 'Description' column contains brief descriptions of each permission set's features. The 'License' column lists the specific licenses required for each set.

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 44.0 | Reset Password | Salesforce | Finish update

The screenshot shows the 'Create' page for a new permission set. The left sidebar is expanded to show 'Users' and 'Permission Sets'. The main content area has a form titled 'Enter permission set information'. It includes fields for 'Label' (set to 'salesmanager'), 'API Name' (set to 'salesmanager'), and 'Description'. Below the form is a section titled 'Select the type of users who will use this permission set' with instructions and options for choosing user types and license assignments.

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%3FsfclFrameOrigin%3Dhttps%253A... | Reset Password | Salesforce | + | Finish update

**Permission Set Overview**

| Setting          | Value                       |
|------------------|-----------------------------|
| API Name         | salesmanager                |
| Namespace Prefix | GOPAL_S                     |
| Created By       | GOPAL_S 01/10/2023, 7:29 pm |

**Apps**

- Assigned Apps**: Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu.
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability.
- App Permissions**: Permissions to perform app-specific actions, such as "Manage 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.

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%3FsfclFrameOrigin%3DentityPermissions | Reset Password | Salesforce | + | Finish update

**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           | --           |

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

The left sidebar shows the navigation menu under the **Users** section, with **Permission Sets** selected. The main content area displays the **salesmanager** permission set.

**Object Permissions** table:

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

**Field Permissions** table:

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

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

The left sidebar shows the navigation menu under the **Users** section, with **Permission Sets** selected. The main content area displays the **salesmanager** permission set.

**Object Permissions** table (with changes made compared to the first screenshot):

| 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** table (with changes made compared to the first screenshot):

| 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 checked="" type="checkbox"/> | <input type="checkbox"/>            |

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 42.0 | 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.

App Menu

This screenshot shows the 'Permission Set Assignment' page for the user 'salesmanager'. The left sidebar is the 'Setup' menu under 'Users', with 'Permission Sets' selected. The main area is titled 'Current Assignments' and displays a blue cactus and sun illustration. Below it, a message says 'No assignments defined.' There are edit, delete, and 'Add Assignment' buttons at the top right of the main area.

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 42.0 | 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        | Role                              | Profile |
|------------------|-----------------------------------|---------|
| Amelia Ellington | Force.com - App Subscription User | aelli   |
| Chatter Expert   | Chatter Free User                 | chatty  |
| Diya Adanna      | UAMS User                         | dadan   |
| GOPAL S          | System Administrator              | GS      |
| Integration User | Analytics Cloud Integration User  | integ   |
| madhu b          | salesmanage                       | mb      |
| Security User    | Analytics Cloud Security User     | sec     |
| sowmya bala      | Manager                           | sbala   |

Cancel Next

App Menu

This screenshot shows the 'Select Users to Assign' dialog. The left sidebar is the 'Setup' menu under 'Users', with 'Permission Sets' selected. The main area lists 'All Users' with columns for Full Name, Role, and Profile. A checkbox next to each user allows selection. The user 'madhu b' has a checked checkbox. At the bottom are 'Cancel' and 'Next' buttons.

The screenshot shows the Salesforce Setup interface under the 'Users' section. The 'Permission Sets' tab is selected. A table titled 'Current Assignments' lists a single user assignment for 'DEEPIKA S V'. The table has columns for Full Name, Active, Role, Profile, User License, and Expires On. The user is assigned the 'System Administrator' role with the 'Salesforce' license.

**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.**

**1.Create a New Permission Set:**

- Go to Setup > Permission Sets and click "New Permission Set."

**2. Define Object Permissions:**

- In the Permission Set, go to "Object Settings" and find the Account object.
- Edit the permissions for the Account object in the Permission Set.
- Grant the "Delete" permission to the user you want to allow to delete records. Leave it unchecked for the other user.

**3.Assign Permission Sets:**

- Assign the newly created Permission Set with the "Delete" permission to the user you want to grant this access to.

**4.Remove Delete Access from Profile:**

- Go to the profile assigned to both users.
- In the profile settings, remove the "Delete" permission for the Account object.

**Profile Creation:**

Creating profiles and add to the existing user to grant the permission set.

The screenshot shows the Salesforce Setup Profiles page. The URL is [kiot54-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000002pwr3%3Fisdp%3Dp1%27](https://kiot54-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000002pwr3%3Fisdp%3Dp1%27). The page title is "Profiles". A search bar at the top right contains "Search Setup". The left sidebar has a "Setup" icon, "Home", and "Object Manager" dropdown. A search bar in the sidebar has "profil" typed. The main content area shows a "standard profile -no acct" with a "Profile Detail" section containing fields like Name, User License, Description, Created By, Modified By, and buttons for Edit, Clone, Delete, and View Users. Below this is a "Page Layouts" section with tables for Standard Object Layouts, Alternative Payment Method, Appointment Invitation, Asset, Asset Relationship, and Assigned Resource. Each table lists Global, Email Application, Home Page Layout, Account, Alternative Payment Method Layout, Appointment Invitation Layout, Asset Layout, Asset Relationship Layout, and Assigned Resource Layout respectively, along with their corresponding "View Assignment" links. The bottom of the page has a footer with a JavaScript link.

The screenshot shows the Salesforce Setup Profiles page. The URL is [kiot54-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000002px8U](https://kiot54-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000002px8U). The page title is "Profiles". A sidebar on the left shows "Setup", "Home", "Object Manager", and "Profiles" (which is selected). A search bar at the top says "Search Setup". The main content area shows the "Profile" section for "Demo std user profile". It includes a "Profile Detail" table with columns for Name, User License, Description, Created By, Modified By, and a "Custom Profile" checkbox. Below this is a "Page Layouts" table with rows for Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, and Asset Relationship. Each row lists the layout name and a "View Assignment" link. At the bottom right, there are "WhatsApp" and "Print Group" buttons.

Screenshot of the Salesforce Setup interface showing the Profiles page. The left sidebar shows a search bar and navigation links for Setup, Home, and Object Manager. Under Profiles, there is a note: "Didn't find what you're looking for? Try using Global Search." The main content area displays two large tables of permission settings for various objects.

| Basic Access                             |                                     |                                     |                                     |                                     |                          | Data Administration        |                                     |                                     |                          |                          |                          |                            |
|--|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|----------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|----------------------------|
|  | Read                                | Create                              | Edit                                | Delete                              | View All                 |                            | Read                                | Create                              | Edit                     | Delete                   | View All                 | Modify All                 |
| Accounts                                 | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Appointment Categories                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Appointment Invitations                  | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Appointment Topic Time Slots             | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Assets                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Authorization Forms                      | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Authorization Form Consents              | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Authorization Form Data Uses             | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Authorization Form Texts                 | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Background Operations                    | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Business Brands                          | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Carts                                    | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Cases                                    | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Communication Subscriptions              | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Communication Subscription Channel Types | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Communication Subscription Consents      | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Communication Subscription Timings       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Contacts                                 | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Ideas                                    | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Images                                   | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Incidents                                | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Individuals                              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Invoices                                 | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Legal Entities                           | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Locations                                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Location Groups                          | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Operating Hours                          | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Orders                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Party Consents                           | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Price Books                              | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Products                                 | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Promotions                               | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Return Orders                            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Sellers                                  | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Service Appointments                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |
| Service Resources                        | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">View All</a> | <a href="#">Modify All</a> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <a href="#">View All</a> | <a href="#">Modify All</a> |

## Permission Sets:

Screenshot of the Salesforce Setup interface showing the Permission Sets page. The left sidebar shows a search bar and navigation links for Setup, Home, and Object Manager. Under Permission Sets, there is a note: "Didn't find what you're looking for? Try using Global Search." The main content area displays the Experience Profile Manager.

**Experience Profile Manager**

Permission Set Overview

| Description                 | API Name                      |
|-----------------------------|-------------------------------|
| Licence                     | Experience_Profile_Manager    |
| Salesforce                  | Namespace Prefix              |
| Session Activation Required | Created By                    |
| Last Modified By            | HARISH_S 22/06/2023, 10:42 am |

**Apps**

- Assigned Apps**: Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu.
- Object Settings**: Permissions to access objects and fields, and settings such as tab 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.
- Named Credential Access**: Permissions to authenticate against named credentials.

The screenshot shows the Salesforce Setup interface under the Profiles section. It lists three profiles: Books, departments, and harishi. Under each profile, there are sections for Custom Object Permissions and Session Settings. The Custom Object Permissions table includes columns for Contact Point Emails, User External Credentials, and various basic access and data administration rights. The Session Settings section includes fields for Session Times Out After (set to 2 hours of inactivity) and Session Security Level Required at Login (set to None). The Password Policies section contains fields for password expiration (90 days), history (3 passwords remembered), minimum length (8), complexity requirement (Must include alpha and numeric characters), and other security settings.

The screenshot shows the Salesforce Setup interface under the Permission Sets section. It displays the Experience Profile Manager for the Accounts permission set. The Tab Settings section has the Available tab selected and set to Visible. The Object Permissions section lists various permissions (Read, Create, Edit, Delete, View All, Modify All) for the Account object, with most checked. The Field Permissions section lists permissions for Account Name, Account Number, Account Owner, and Account Site, with Read Access checked for all.

By following these steps, you have effectively granted delete access to one user while keeping it restricted for the other user. The user with the Permission Set will be able to delete Account

records, while the user without the Permission Set will only have Create, Read, and Edit access but won't have the ability to delete records.

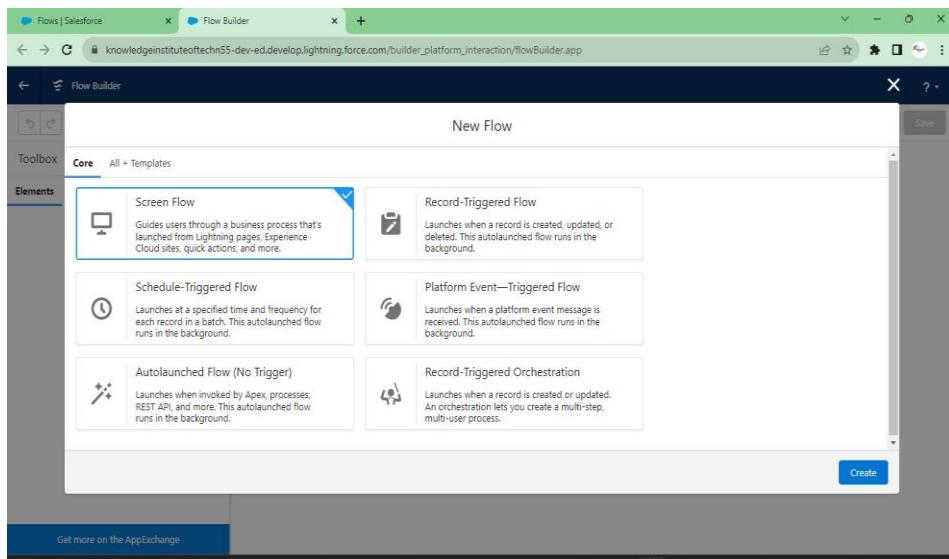
## 4.Create a screen flow for a basic survey to fill in the details for any form.

### Step 1: Access Salesforce Setup

1. Open your Salesforce account and log in.
2. Select the gear icon or your profile photo in the top-right corner.
3. From the dropdown menu, choose "Setup".

### Step 2: Create a flow

1. In the Quick Find box of the Setup menu, type "Flows" and choose "Flows."

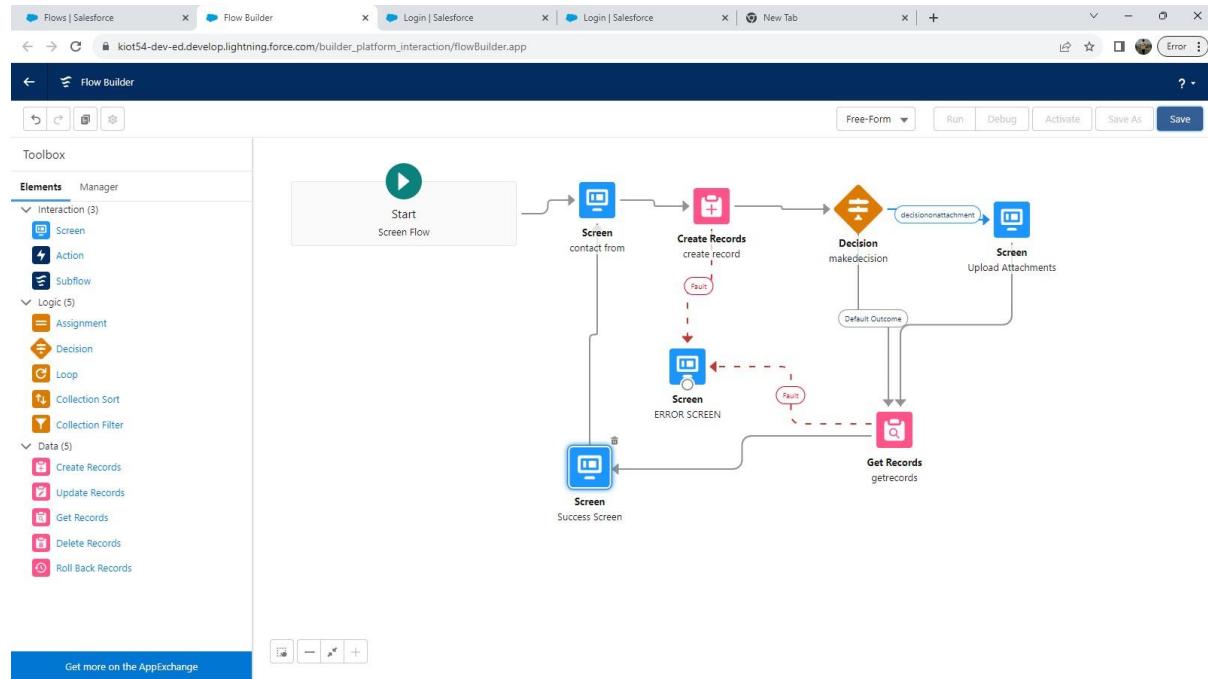


### Step 3 : Add Screen Elements

1. Move a "Screen" component into position on the canvas. This will be where your flow will begin.
2. To configure an element of the screen, click on it.
3. Include language and instructions on this screen to explain the survey and what data are needed.

4. To allow visitors to enter survey information, drag and drop the necessary input components (such as text fields, radio buttons, and checkboxes) onto the page. These components can be found in the left-hand palette.

5. If required, add the proper labels, explanatory text, and validation rules to each input element.



#### Step 4: construct Variables

1. You must construct variables to hold the survey data if you wish to collect and save it. Create variables for each field on the screen by selecting the "Manager" tab in the palette. Verify that the data types of the related fields and the variable types are the same.

The screenshot shows a Salesforce Flow step titled "CONTACT FROM". The form fields are filled with the following values:

- first name: HARISH
- \*last name: S
- \*Email: harish0733962@gmail.com
- Phone: 6379523138
- Attachments?

A "Next" button is visible at the bottom right of the form. To the right of the form is a "Debug Details" sidebar containing the following sections:

- Transaction Committed**: Any records that the flow was ready to create, update, or delete were committed to the database.
- SCREEN: Success Screen**  
Display Text: conDis  
Value at run time:  
**HUARRY! YOUR RECORD SUCCESSFULLY CREATED**
- Selected Navigation Button: PREVIOUS**
- Transaction Committed**: Any records that the flow was ready to create, update, or delete were committed to the database.
- SCREEN: Upload Attachments**  
Lightning Component: uploadfiles  
Screen component: forceContent:fileUpload  
Inputs:  
label = (Upload Attachments)  
recordId = (conid)  
Outputs:  
null
- Selected Navigation Button: PREVIOUS**
- Transaction Committed**: Any records that the flow was ready to create, update, or delete were committed to the database.

The screenshot shows a success message "HUARRY! YOUR RECORD SUCCESSFULLY CREATED" displayed prominently. Below the message are navigation buttons: "Previous" and "Next". The browser's address bar shows the URL: [https://kiot54-dev-ed--c.develop.vf.force.com/flow/CONTACT\\_FROM/3015j000001HXSVA4](https://kiot54-dev-ed--c.develop.vf.force.com/flow/CONTACT_FROM/3015j000001HXSVA4).

The screenshot shows the Salesforce Setup Flows page. On the left, there is a sidebar with categories like Apps, Process Automation, and Workflows. Under the 'Flows' category in the sidebar, 'Flow Category' is expanded, showing 'Migrate to Flow'. The main area displays a table titled 'All Flows' with columns for Flow Label, Process Type, Active, Template, Package State, and Last Modified Date. The table lists 35 items, including flows like 'Basic Approval Request', 'Book Appointment from invitation', and 'CONTACT FROM'. The interface includes a search bar at the top and various buttons for managing flows.

This screenshot is identical to the one above, showing the Salesforce Setup Flows page. It displays the same list of flows in the 'All Flows' table. The 'CONTACT FROM' flow is highlighted with a blue border in the table. The sidebar on the left remains the same, showing the 'Flows' category under 'Process Automation'.

## Step 7: Create a Finish Screen

Add a final screen where you can thank the user for completing the survey and provide any necessary information or instructions.

### **Step 8: Connect the Screens**

Connect the screens and elements in the desired order by dragging connectors between them.

### **Step 9: Set the Flow Properties**

Click on the canvas and go to the Properties tab on the right to set the flow's name, description, and other settings.

### **Step 10: Activate the Flow**

After designing the flow, click "Save" and then "Activate" to make it available for users.