

SALESFORCE DEVELOPER (NAAN MUDHALVAN)

ASSIGNMENT 1

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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' and 'Example: Account Name', and a 'Data Type' dropdown set to 'Text'. The 'Optional Features' section lists checkboxes for various 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

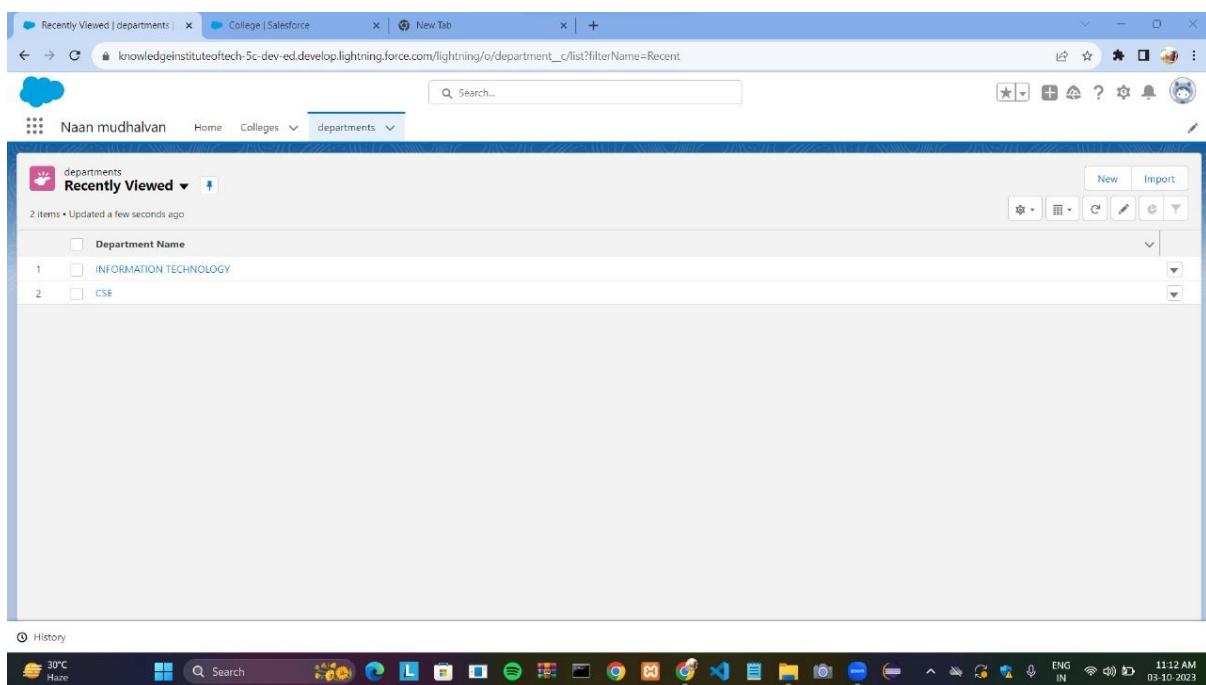
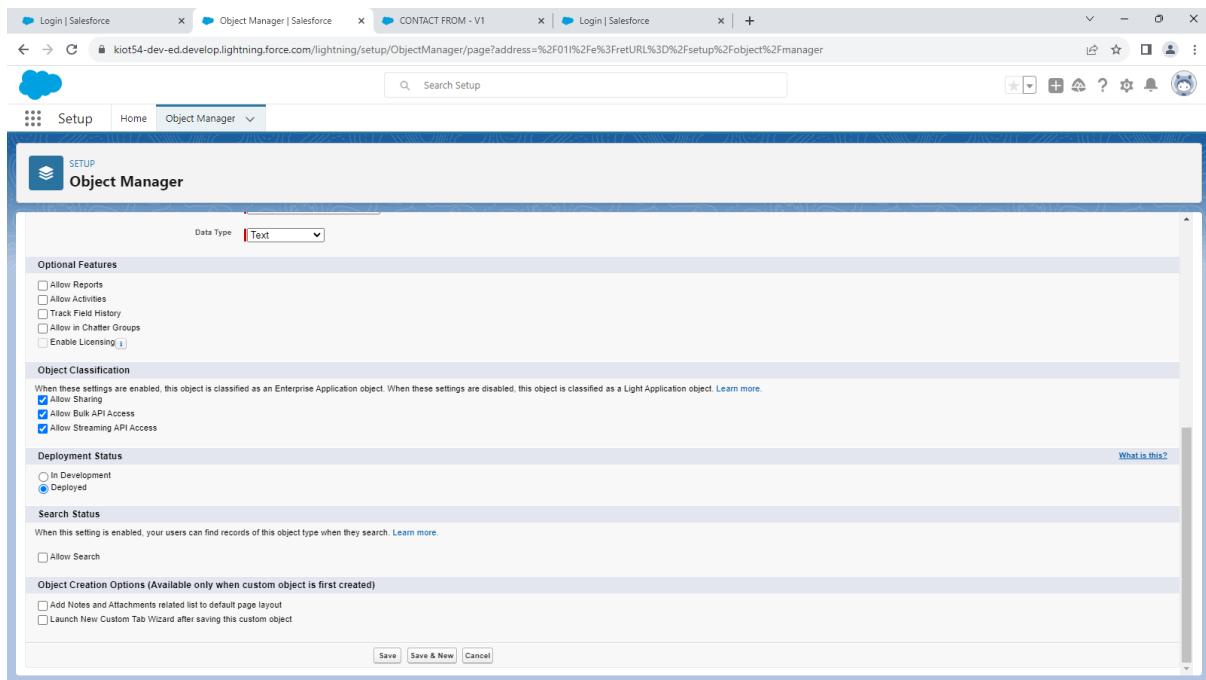
This record name appears in page layouts, reports, and search results. For example, the record name for Account is "Account Name" and for Case is "Case Number". Note that the record name field is always called "Name" when referenced via the API.

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), battery level, and the date/time (11:12 AM 03-10-2023).

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 is currently on 'Data Type'. It shows a list of options: None Selected (selected), Auto Number, Formula, Roll-Up Summary, Lookup Relationship, Master-Detail Relationship (selected), External Lookup Relationship, Checkbox, Currency, and Date. Each option has a brief description below it. At the top right of the panel are 'Step 1', 'Next', and 'Cancel' buttons.

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

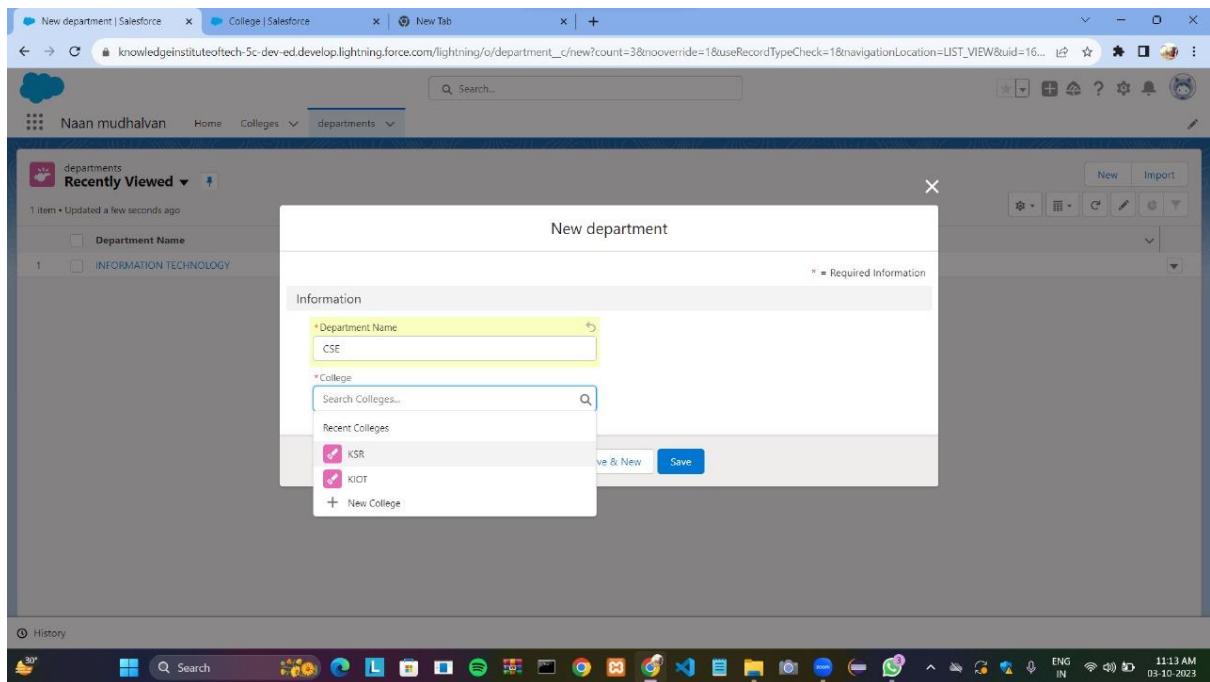
Related Details

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

None Selected	Select one of the data types below.
<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"> 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.
<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 Subsrontin User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: college
Summarized Object: CDepartments

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

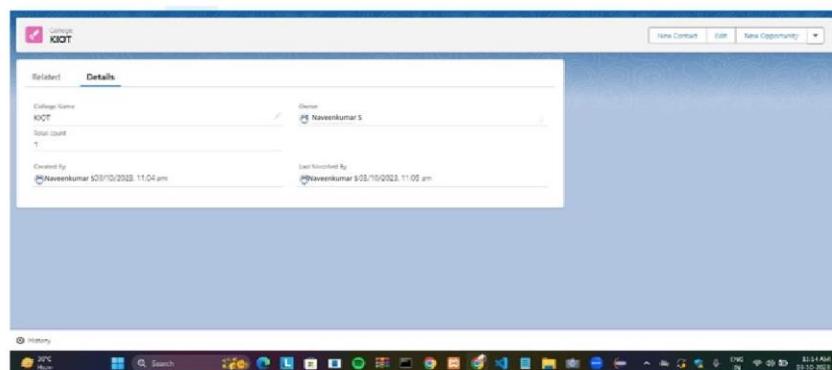
Field to Aggregate: None

Filter Criteria

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

Help for this Page ?

Previous Next Cancel



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

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty_00d5j00000cirbea3_r6kjemujhch@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	G_S_VIGNAYA	VG_S	vignaya@naanmudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Sailappan_User_Vignaya	usail	vignayavas0@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Work.com Only User
<input type="checkbox"/>	Sailappan_Vignaya	vsail	gsvignaya@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	integ	integration@00d5j00000cirbea3.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightsecurity@00d5j00000cirbea3.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	vignaya_089	vgun	sakthivignaya08@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Work.com Only User
<input type="checkbox"/>	Vignaya_Sakthi	sign	vignayavas@gmail.com	<input checked="" type="checkbox"/>	<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, 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. The main content area is titled "Sharing Settings" and contains a sub-section "Sharing Settings". It says, "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." Below this is a table titled "Default Sharing Settings" with a "Manage sharing settings for" dropdown set to "All Objects". The table has columns for Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. It lists various objects like Lead, Account and Contract, Contact, Order, Asset, Opportunity, Case, Campaign, Campaign Member, User, Activity, Calendar, Price Book, and Product, along with their respective sharing settings.

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

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Permission Sets

Help for this Page

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Access to activity	Allows access to the store. Lets users see products and categories...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all Buyer capabilities, and allows access to manage carts an...	R2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	CRM User	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Commerce Admin	Manage Service Cloud Voice contact centers that use Amazon Comme...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Admin	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Salesforce
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Facility Manager
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	Merchandise	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Limited access to Order Management features for Self Service	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper		

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

1-25 of 29 | 0 Selected | Page 1 of 2

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

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Permission Sets

Create

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

Not sure what a permission set license is? Learn more here.

License: --None--

Save Cancel

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

Assigned Apps

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

Object Settings

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

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

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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.

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

Setup Home Object Manager

Search Setup

Select Users to Assign

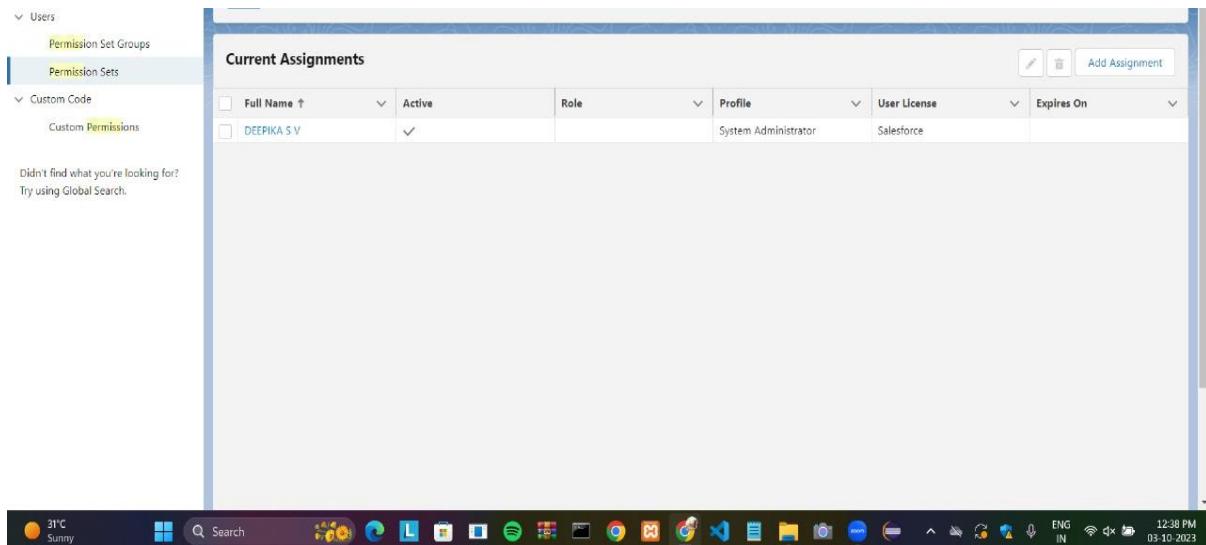
All Users

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 is titled 'Select Users to Assign' and shows a list of users under 'All Users'. A checkbox next to 'madhu b' is checked. The table lists users with their full names, roles, and profiles. At the bottom are 'Cancel' and 'Next' 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.

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.

Profile standard profile -no acc

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

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

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

Profile Detail

Name	standard profile -no acc	User License	Salesforce Platform	Description	Created By	Modified By
					HARISH S 30/09/2023, 02:11 pm	HARISH S 02/10/2023, 12:36 pm

Page Layouts

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

Profile Demo std user profile

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

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

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

Profile Detail

Name	Demo std user profile	User License	Customer Community	Description	Created By	Modified By
					HARISH S 02/10/2023, 12:22 pm	HARISH S 02/10/2023, 12:22 pm

Page Layouts

Standard Object Layouts	Global	Order	Order Layout
Email Application	Global Layout [View Assignment]	Not Assigned	[View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product	Order Product Layout [View Assignment]
Account	Account Layout [View Assignment]	Payment	Payment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment Authorization	Payment Authorization Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment	Payment Authorization Adjustment Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Gateway	Payment Gateway Layout [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Payment Gateway Log	Payment Gateway Log Layout [View Assignment]
Assigned Resource	Assigned Resource Layout [View Assignment]	WhatsApp	Payment Group Layout [View Assignment]

Screenshot of the Salesforce Setup interface showing the Profiles page. The page displays a grid of objects with their basic access and data administration permissions. The objects listed include Accounts, Appointment Categories, Appointment Invitations, Appointment Topic Time Slots, Assets, Authorization Forms, Authorization Form Consents, Authorization Form Data Uses, Authorization Form Texts, Background Operations, Business Brands, Carts, Cases, Communication Subscriptions, Communication Subscription Channel Types, Communication Subscription Consents, Communication Subscription Timings, Contacts, Ideas, Images, Incidents, Individuals, Invoices, Legal Entities, Locations, Location Groups, Operating Hours, Orders, Party Consents, Price Books, Products, Promotions, Return Orders, Sellers, Service Appointments, and Service Resources.

Permission Sets:

Screenshot of the Salesforce Setup interface showing the Permission Sets page. The page displays the Experience Profile Manager section. It shows a permission set named "Experience_Profile_Manager" with the following details: Description: "Experience Profile Manager", API Name: "Experience_Profile_Manager", Namespace Prefix: "", Created By: "HARISH_S", Created Date: "22/06/2023, 10:42 am". The "Apps" section lists various app permissions such as Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, Flow Access, and Named Credential Access.

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.

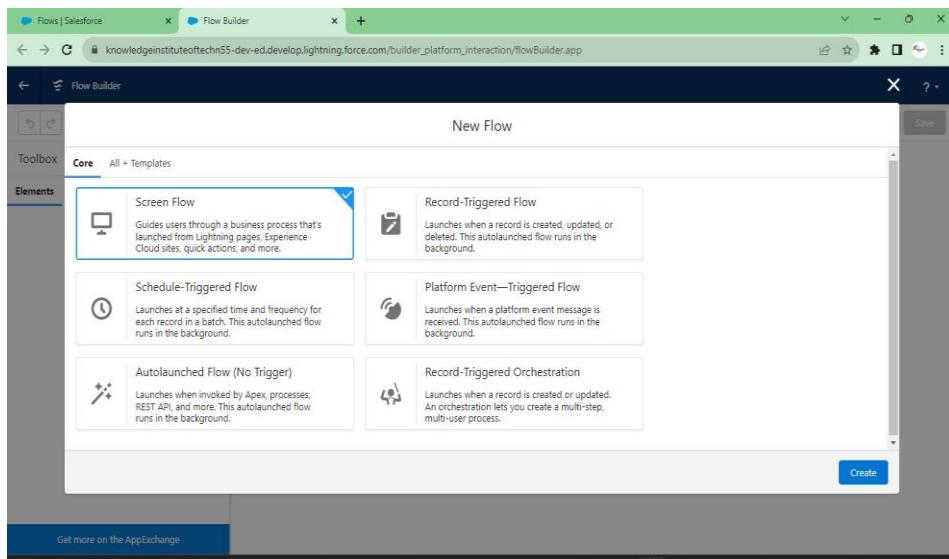
4.Create a screen flow for a basic survey to fill in the details for any form.

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."

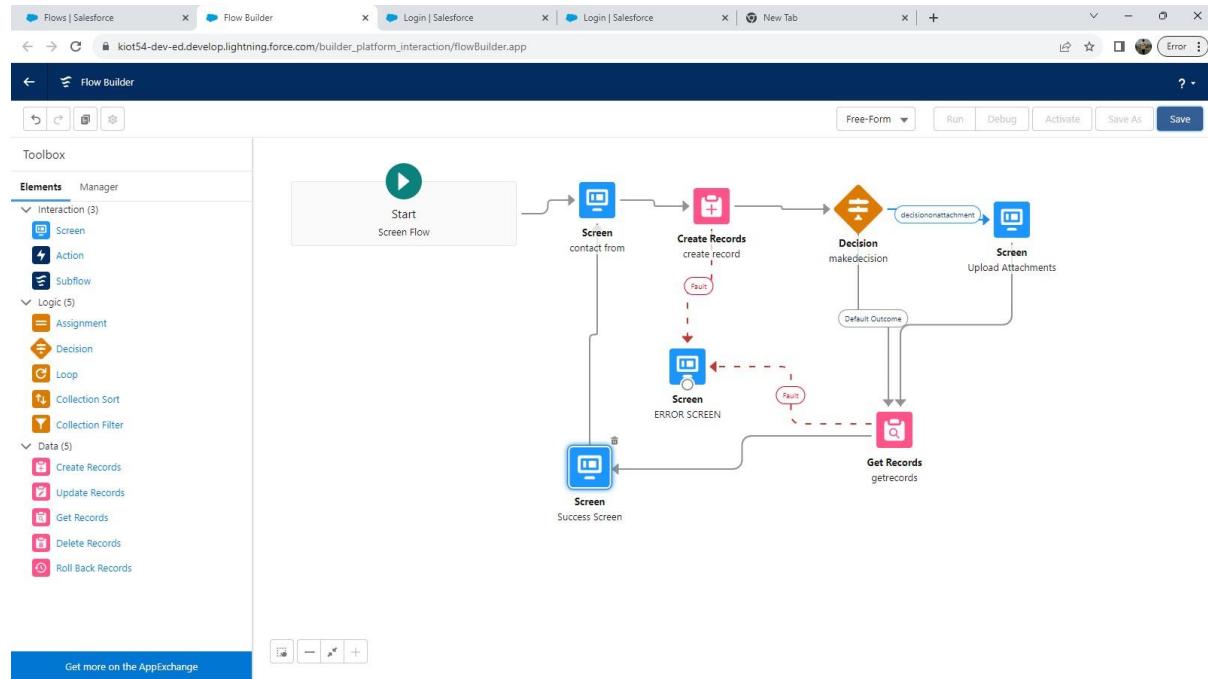


Step 3 : Add Screen Elements

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 tab bar shows the URL: 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: Flow Label, Process Type, Active, Template, Package State, Packag..., Last Mo..., 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 selection bar around its row. The rest of the interface, including the sidebar and toolbars, remains consistent with the first screenshot.

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.