

**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.**

**Solution:**

**Step 1: Create Custom Objects**

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

The screenshot shows the 'New Custom Object' page in the Salesforce Setup interface. The object name is 'College\_C'. The 'Label' field contains 'College' and the 'Plural Label' field contains 'Colleges'. The 'Object Name' field is set to 'College'. The 'Description' field is empty. Under 'Optional Features', 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing' are unchecked. Under 'Object Classification', 'Allow Sharing' and 'Allow Bulk API Access' are checked, while 'Allow Streaming API Access' is unchecked. Under 'Deployment Status', 'Deployed' is selected. Under 'Search Status', 'Allow Search' is unchecked. Under 'Object Creation Options', 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object' are unchecked. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

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

The screenshot shows the 'Object Manager' setup page in Salesforce. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various system icons. The main title is 'New Custom Object'. A message bar at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles.' with links to 'Tell me more!' and 'Don't show this message again'.

**Custom Object Definition Edit**

**Custom Object Information**

- Label: department (Example: Account)
- Plural Label: departments (Example: Accounts)
- Starts with vowel sound:

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

- Object Name: department (Example: Account)

Description: (Empty text area)

Context-Sensitive Help Setting:

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name: (None)

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

- Record Name: Department Name (Example: Account Name)

Data Type: Text

**Optional Features**

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

**Object Classification**

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

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Deployment Status**

In Development (In Development) Deployed (Deployed)

**Search Status**

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

- Allow Search

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

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

Save | Save & New | Cancel

## Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College\_\_c" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."
4. Click the "New" button to create a new custom field.
5. Choose "Master-Detail Relationship" as the data type.
6. Enter a label for the relationship, e.g., "Department\_\_c."
7. Choose "Department\_\_c" as the related object.
8. Configure other settings as needed and click "Next."
9. Specify the field-level security and add it to relevant page layouts.
10. Click "Next" and "Save" to create the relationship.

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002zNzI/FieldsAndRelationships/new

Setup Home Object Manager

CDepartment

New Custom Field

Step 1. Choose the field type

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

Data Type

None Selected

Select one of the data types below.

Auto Number

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

Formula

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

Roll-Up Summary

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

Lookup Relationship

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

Master-Detail Relationship

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

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

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

Help for this Page

Next Cancel

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002zNkI/FieldsAndRelationships/new

Setup Home Object Manager

college

New Custom Field

Step 2. Enter the details

Field Label

Field Name

Description

Help Text

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

Previous Next Cancel

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

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Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

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Setup Home Object Manager

### college New Custom Field

Step 3. Define the summary calculation Step 3 of 5

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

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

Filter Criteria  
All records should be included in the calculation (selected)  
Only records meeting certain criteria should be included in the calculation

Previous Next Cancel

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002zNKL/FieldsAndRelationships/new

Setup Home Object Manager

### college New Custom Field

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

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

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

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Previous Next Cancel

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002zNKI/FieldsAndRelationships/new

**college**

**New Custom Field**

**Step 5. Add to page layouts**

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

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

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  
 college Layout

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

Help for this Page

Previous Save & New Save Cancel

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002zNKI/FieldsAndRelationships/view

**college**

**Fields & Relationships**

5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(0)		✓
Created By	CreatedById	Lookup(User)		
Department_c	Department_c_c	Master-Detail(department)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Total count	Total_count__c	Roll-Up Summary (COUNT CDepartment)		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

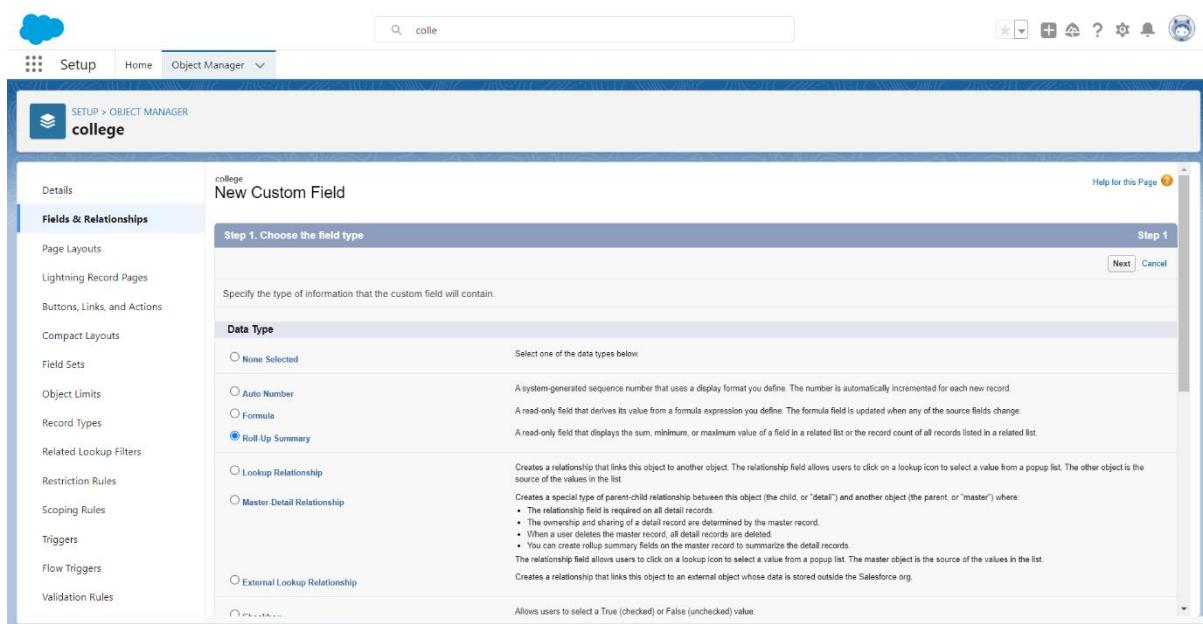
Scoping Rules

Triggers

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

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

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



**college** New Custom Field

**Step 2. Enter the details**

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

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

Help for this Page

Previous Next Cancel

**Fields & Relationships**

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

**college** New Custom Field

**Step 3. Define the summary calculation**

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

**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

The screenshot shows the Salesforce Setup interface for creating a new custom field named "college". The left sidebar lists various setup categories under "Fields & Relationships". The main content area is titled "New Custom Field" and is currently on "Step 4 of 5: Establish field-level security". The step details the configuration of field-level security profiles. A table lists profiles with checkboxes for "Visible" and "Read-Only" permissions. Most profiles have both checkboxes checked.

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"/>
France.com - Ann Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce Setup interface for creating a new custom field named "college". The left sidebar lists various setup categories under "Fields & Relationships". The main content area is titled "New Custom Field" and is currently on "Step 5 of 5: Add to page layouts". The step details the configuration of page layouts. A table lists page layout names with checkboxes for "Add Field". Only "college Layout" has its checkbox checked. A note at the bottom indicates that the field will be added as the last field in the first 2-column section of the selected layout.

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

## Step 4: Create a Lightning App

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

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar is collapsed, showing a search bar and navigation links for Setup, Home, and Object Manager. The main content area is titled "Lightning Experience App Manager" and displays a table of 21 items. The table has columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visi... (Visibility). The table lists various standard and custom apps like All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, Marketing, Platform, Queue Management, and Sales. The "App Manager" item is highlighted in the list.

App Name ↑	Developer Name	Description	Last Modified Date	App T...	Visi...
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	22/08/2023, 11:08 am	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/08/2023, 11:08 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	22/08/2023, 11:08 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	22/08/2023, 11:10 am	Lightning	✓
5 Community	Community	Salesforce CRM Communities	22/08/2023, 11:08 am	Classic	✓
6 Content	Content	Salesforce CRM Content	22/08/2023, 11:08 am	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	22/08/2023, 11:08 am	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/08/2023, 11:08 am	Lightning	✓
9 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/08/2023, 11:08 am	Lightning	✓
10 Marketing	Marketing	Best-in-class on-demand marketing automation	22/08/2023, 11:08 am	Classic	✓
11 Platform	Platform	The fundamental Lightning Platform	22/08/2023, 11:08 am	Classic	✓
12 Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2023, 11:08 am	Lightning	✓
13 Sales	Sales	The world's most popular sales force automation (SFA) solution	22/08/2023, 11:08 am	Classic	✓

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

## New Lightning App

### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

#### App Details

\* App Name

\* Developer Name

Description

#### App Branding

Image

Primary Color Hex Value

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

**Next**

Salesforce Data Apps Core Light Mobile Salesforce Branding Salesforce Navigation Salesforce Notifications

12 Queue Management QueueManagement Create and manage queues for your business. 22/08/2023, 11:08 am Lightning ✓  
13 Sales Sales The world's most popular sales force automation (SFA) solution 22/08/2023, 11:08 am Classic

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/o/student\_c/list?filterName=Recent

student	Recently Viewed	Actions
1 item • Updated a few seconds ago	student Name	New Import Change Owner New List C Edit Delete
1	Gowri	

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/o/CDepartment\_\_c/list?filterName=Recent

The screenshot shows a Salesforce Lightning Experience page for the 'CDepartments' object. The top navigation bar includes links for 'My college', 'college', 'students', 'CDepartments', 'Content', and 'colleges'. A search bar at the top right contains the placeholder 'Search...'. The main content area displays a 'Recently Viewed' list titled 'CDepartments'. It shows one item: 'IT' (with ID 1). The interface includes standard Salesforce navigation and edit tools.

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/o/college\_\_c/list?filterName=Recent

The screenshot shows a Salesforce Lightning Experience page for the 'college\_\_c' object. The top navigation bar includes links for 'My college', 'college', 'students', 'CDepartments', 'Content', and 'colleges'. A search bar at the top right contains the placeholder 'Search...'. The main content area displays a 'Recently Viewed' list titled 'colleges'. It shows one item: 'kiot' (with ID 1). The interface includes standard Salesforce navigation and edit tools.

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

**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.**

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

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del  ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del  ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del  ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community User	Customer Community	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>

knowledgeinstituteoftech-bc-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users, Permission Set Groups, Permission Sets, Profiles (which is selected), and Public Groups. The main content area displays a table titled "Profiles" with columns for Action, Profile Name, User License, and Custom. The table lists various profiles such as Partner App Subscription User, Partner Community Login, Partner Community User, Read Only, Salesforce API Only System Integrations, Silver Partner User, Solution Manager, Standard Platform User, Standard User, System Administrator, and Work.com Only User. A checkmark is present in the "Custom" column for the "Salesforce" profile.

knowledgeinstituteoftech-bc-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j0000013OpI%3F...

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar shows the "Profiles" link is selected. The main content area is titled "Profile Manager" for the "Manager" profile. It includes sections for "Profile Detail" (Name: Manager, User License: Salesforce Platform, Description: null, Created By: GOWSIKA DEVILS T, Modified By: GOWSIKA DEVILS T), "Page Layouts" (Standard Object Layouts: Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation; Operating Hours: Global, Order, Order Product, Payment, Payment Authorization, Payment Authorization Adjustment), and "Record Types" (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).

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j0000013OpI%2F...

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

SETUP Profiles

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Sellers

Streaming Channels

User External Credentials

Custom Object Permissions

	Basic Access	Create	Edit	Delete	View All	Data Administration	Modify All
Banks	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
CDepartments	<input type="checkbox"/>	<input type="checkbox"/>					
Child_Objects_	<input type="checkbox"/>	<input type="checkbox"/>					
colleges	<input type="checkbox"/>	<input type="checkbox"/>					
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
departments	<input type="checkbox"/>	<input type="checkbox"/>					
Parent_Objects_	<input type="checkbox"/>	<input type="checkbox"/>					
students	<input type="checkbox"/>	<input type="checkbox"/>					

Session Settings

Session Times Out After: 2 hours of inactivity

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

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j0000013OpI%2F...

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

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ADMINISTRATION

Users

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SETUP Profiles

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Sellers

Streaming Channels

User External Credentials

Custom Object Permissions

	Basic Access	Create	Edit	Delete	View All	Data Administration	Modify All
Banks	<input checked="" type="checkbox"/>						
CDepartments	<input type="checkbox"/>						
Child_Objects_	<input type="checkbox"/>						
colleges	<input type="checkbox"/>						
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
departments	<input type="checkbox"/>						
Parent_Objects_	<input type="checkbox"/>						
students	<input type="checkbox"/>						

Session Settings

Session Times Out After: 2 hours of inactivity

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

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obfuscate secret answer for password resets

Require a minimum 1 day password

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Banks

**Recently Viewed**

0 items • Updated a few seconds ago

Bank Name

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

New Import

Search...

Home Customers Banks customers

Google Drive Help Star Gear Question Mark Bell GitHub

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/o/Customer\_\_c/list?filterName=Recent

customers

**Recently Viewed**

0 items • Updated a few seconds ago

Customer Name

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

New Import Change Owner

Search...

Home Customers Banks customers

Google Drive Help Star Gear Question Mark Bell GitHub

## Step 2:

### Permission Sets:

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

### Object-Level Security:

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

### Record-Level Security:

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

### Ownership:

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

### Organization-Wide Defaults:

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

### Testing:

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

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar is collapsed, and the main content area is titled "Permission Sets". Below the title, there is a brief description and a note about the mobile app. A table lists 29 permission sets, each with an "Action" column (containing "New" and "Clone" buttons), a "Permission Set Label" column, a "Description" column, and a "License" column. The "Description" column provides a brief overview of the permissions granted by each set. The "License" column indicates which license is required for each set. At the bottom of the table, there are navigation links for "Previous" and "Next" pages, and a page number indicator showing "Page 1 of 2".

Action	Permission Set Label	Description	License
New	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
Del   Clone	Experience Profile Manager		Salesforce
Clone	Facility Manager		Facility Manager

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet

Search Setup

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP

Permission Sets

Create

Label

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.](#)

Save Cancel

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet

Search Setup

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Salesforce Scheduler

SETUP

Permission Sets

Create

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?

- None- (selected)
- 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.](#)

Licenses

Save Cancel

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008TdOY

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The permission set is named 'salesmanager'. The 'Permission Set Overview' section displays basic information: API Name 'salesmanager', Namespace Prefix 'GOWSIKA\_DEVI\_S\_T', and Created By 'GOWSIKA DEVI S T' on 04/10/2023, 10:33 pm. The 'Session Activation Required' checkbox is unchecked. The 'Last Modified By' field shows 'GOWSIKA DEVI S T' on 04/10/2023, 10:33 pm. Below this, the 'Apps' section lists several categories: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, and Apex Class Access. The URL in the browser is knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008TdOY%3Fs%3DEntityPermis...

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008TdOY%3Fs%3DEntityPermis...

The screenshot shows the same Salesforce Setup interface with the 'Permission Sets' page open, but the 'Object Settings' tab is selected under the 'Permission Set Overview' section. This view displays a table of object permissions for the 'salesmanager' permission set. The columns are Object Name, Object Permissions, Total Fields, and Tab Settings. The table includes rows for various objects like Accounts, AI Insight Reasons, AI Record Insights, Alternative Payment Methods, etc., with most entries showing 'No Access' as the permission level. The URL in the browser is knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008TdOY%3Fs%3DEntityPermis...

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008TdOY%3Fs%3DEntityPermis...

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Video Tutorial | Help for this Page

Permission Set Overview > Object Settings Banks

Banks Edit

Tab Settings

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

Object Permissions

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

javascript:rcSelf(%2F0PS5j000008TdOY%3Fs%3DEntityPermissions%26o%3D015j000002zPAz%26isdtP%3Dp1);

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008TdOY%2Fe%3Fs%3DEntityP...

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Video Tutorial | Help for this Page

Permission Set Overview > Object Settings Banks

Banks Save Cancel

Tab Settings

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

Object Permissions

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

https://knowledgeinstituteoftech-bc-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/0PS5j000008TdOY/e?s=EntityPermissions&o=015j000002zPAz&isdtP=p1

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008TdOY/PermissionSetAssignment/home

Search Setup

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.. > SETUP > PERMISSION SET 'SALESMANAGER'

**salesmanager**

Current Assignments

Add Assignment

No assignments defined.

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008TdOY/PermissionSetAssignment/new

Search Setup

Setup Home Object Manager

users

All Users ▾

6 items • Sorted by Full Name • Filtered by All users • Updated a few seconds ago

Search this list...

Full Name ↑	AI...	Username	R...	A...	Profile
Chatty Expert	Chatter	chatty.00d5j00000cirjeav.dqtg98bh91q3@chatter.salesforce.co...	<input checked="" type="checkbox"/>	Chatter Free User	
GOWSIKA DEVI S T	GS T	gowsikadevi@naanmudhalvan.com	<input checked="" type="checkbox"/>	System Administrator	
Integration User	integ	integration@00d5j00000cirjeav.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration Us...	
Security User	sec	insightssecurity@00d5j00000cirjeav.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	
User A	ua	2k20lt08@kiot.ac.in	<input checked="" type="checkbox"/>	Manager	
User B	ub	gowsikadevist@gmail.com	<input checked="" type="checkbox"/>	Salesmanager	

Cancel Next

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

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0P55j000008TdOY/PermissionSetAssignment/new

Setup Home Object Manager

Search Setup

No expiration date

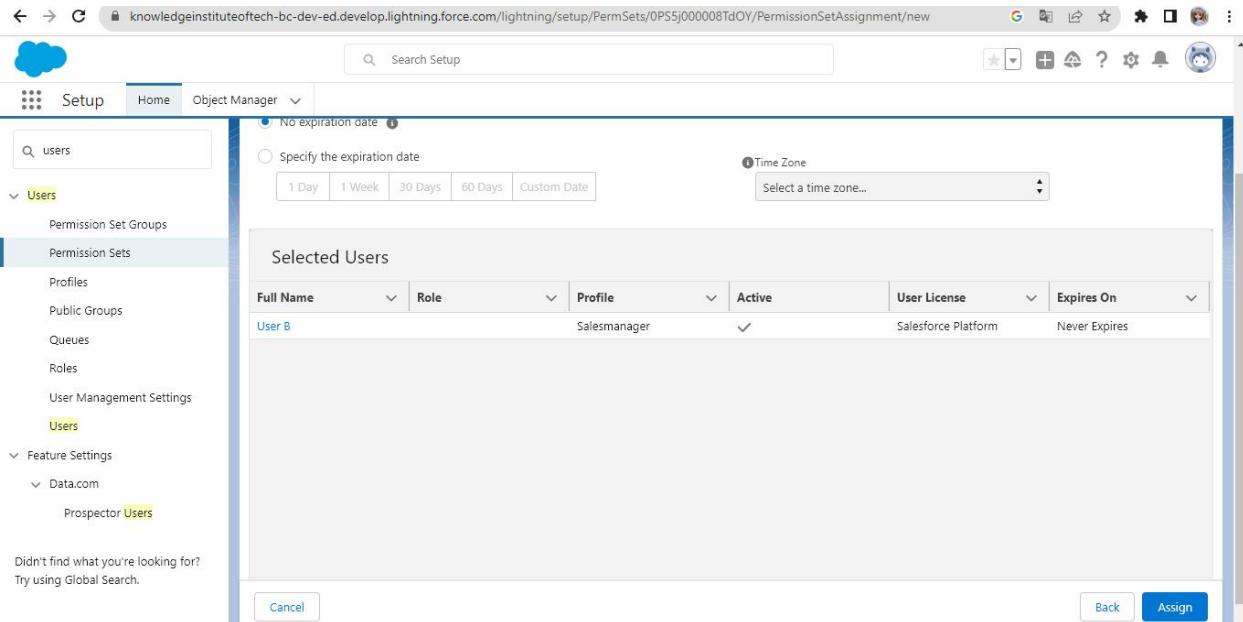
Specify the expiration date

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

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
User B	Salesmanager	Salesforce Platform	✓	Never Expires	

Cancel Back Assign



knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJzZXR1cF9wbGF0Zm9ybV9wZXJtczpwc2FSZX... G

Setup Home Object Manager

Search Setup

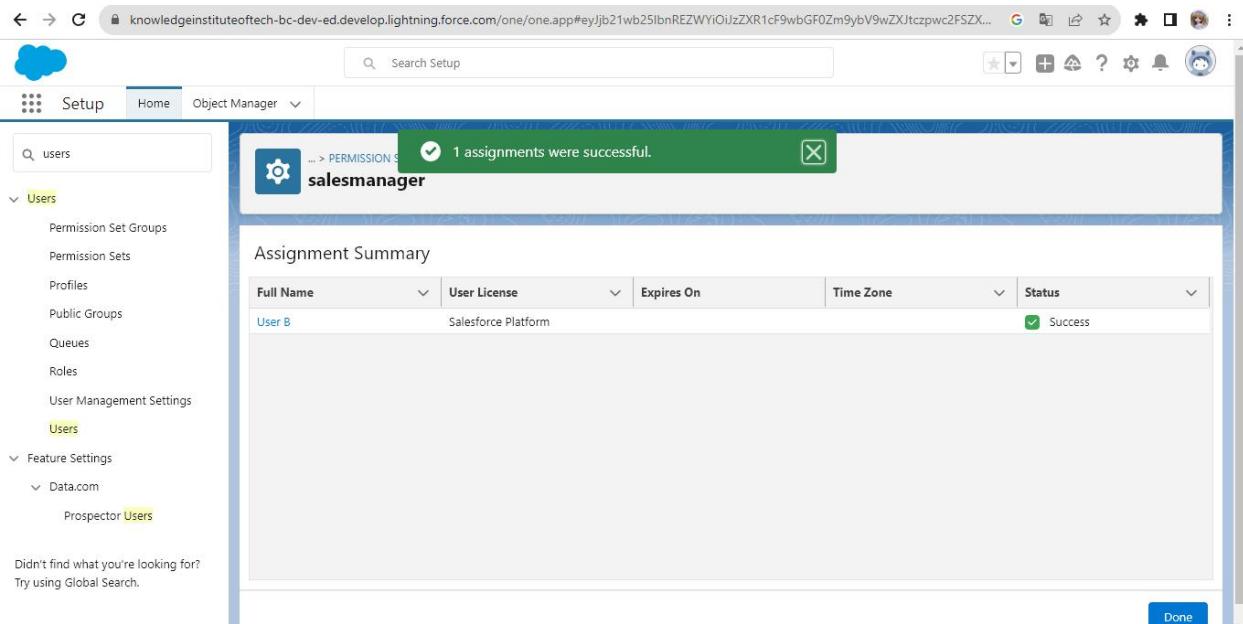
PERMISSION SET salesmanager

1 assignments were successful.

Assignment Summary

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

Done



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

**Solution:**

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

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

## Step 2:

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

The screenshot shows the Salesforce Setup interface under the 'Profiles' section. On the left sidebar, 'Profiles' is selected. The main area displays a 'Clone Profile' form. It asks for the name of the new profile ('Enter the name of the new profile') and specifies that an existing profile must be selected to clone from ('You must select an existing profile to clone from'). The 'Existing Profile' dropdown is set to 'Standard Platform User'. The 'User License' is listed as 'Salesforce Platform' and the 'Profile Name' is 'GOWSI'. At the bottom of the form are 'Save' and 'Cancel' buttons.

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

## Step 3:

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

The screenshot shows the 'Profile Detail' for the 'gowi' profile. The profile name is 'gowi', user license is 'Salesforce Platform', and it is a 'Custom Profile'. The 'Profile Detail' table includes fields for Name, User License, Description, Created By, Modified By, and Record Type Settings. Below this is the 'Page Layouts' section, which lists standard object layouts for Global, Email Application, and Home Page Layout, along with their respective global layouts and operating hours.

knowledgeinstituteoftech-bc-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j0000013PHr%2Fe%3FretUR...         

## SETUP Profiles

Description

**Custom App Settings**

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>		<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>		<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Hive App (Hive_App)	<input checked="" type="checkbox"/>	<input type="radio"/>		<input type="checkbox"/>	<input type="radio"/>
kiot (kiot)	<input type="checkbox"/>	<input type="radio"/>			

**Connected App Access**

My college	<input type="checkbox"/>
------------	--------------------------

**Service Provider Access**

WDC (standard_Work)	<input type="checkbox"/>
---------------------	--------------------------

**Tab Settings**

Overwrite users' personal tab customizations

knowledgeinstituteoftech-bc-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j0000013PHr%2Fe%3FretUR...         

## SETUP Profiles

**BASIC ACCESS**

	Read	Create	Edit	Delete	View All	Modify All
Banks	<input type="checkbox"/>					
CDepartments	<input type="checkbox"/>					
Child_Objects_	<input type="checkbox"/>					
colleges	<input type="checkbox"/>					
customers	<input type="checkbox"/>					
departments	<input type="checkbox"/>					

**DATA ADMINISTRATION**

	Read	Create	Edit	Delete	View All	Modify All
Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent_Objects_	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Resources	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Session Settings**

Session Times Out After  

Session Security Level Required at Login  

**Password Policies**

User passwords expire in  

Enforce password history  

Minimum password length  

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. A new user is being created with the following details:

- General Information:**
  - First Name: gowsika11
  - Last Name: S
  - Alias: gs
  - Email: gowsikadevist@gmail.com
  - Username: gowsikadevist@gmail.com
  - Nickname: User169644092056738898
  - Title: (empty)
  - Company: (empty)
  - Department: (empty)
  - Division: (empty)
- Role:** Director, Channel Sales
- User License:** Salesforce Platform
- Profile:** gowsi
- Active:** checked
- Other Options:** Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User

## Step 4

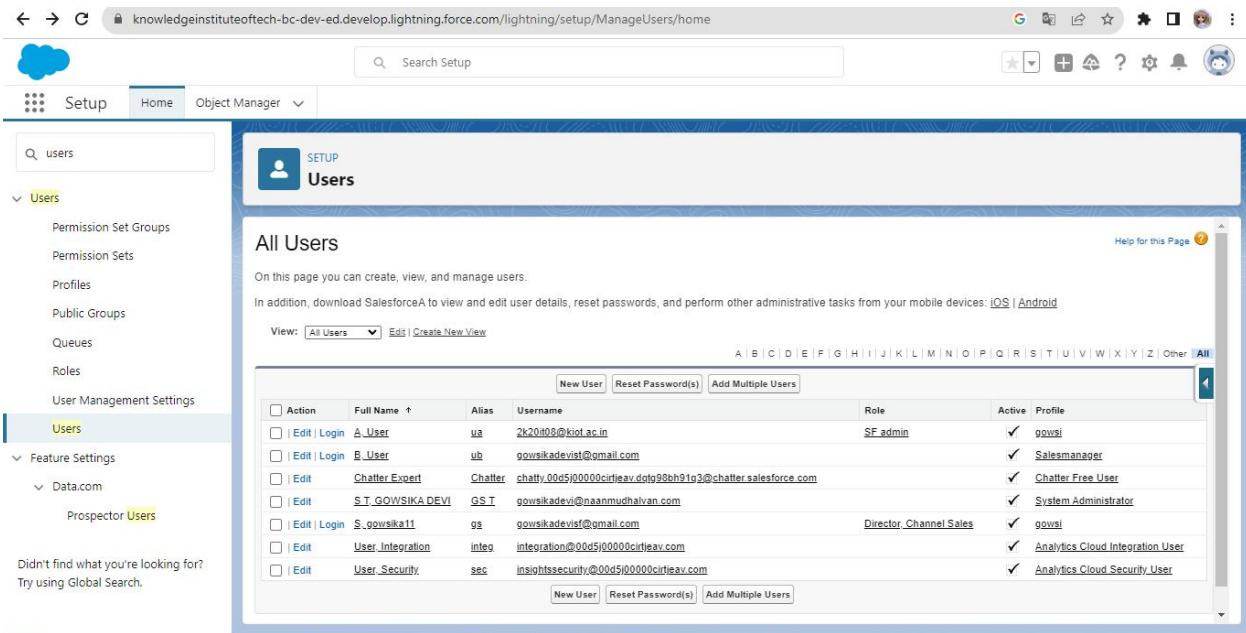
Now you can preview your created profile on the profile option here my profile name gowsi has been created with the access of read,create,edit along with view on it

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. A user named 'User A' is being edited with the following details:

- General Information:**
  - First Name: User
  - Last Name: A
  - Alias: ua
  - Email: 2k20it08@kiot.ac.in
  - Username: 2k20it08@kiot.ac.in
  - Nickname: User1696144034388944643
  - Title: (empty)
  - Company: knowledge institute of techn
  - Department: (empty)
  - Division: (empty)
- Role:** SF admin
- User License:** Salesforce Platform
- Profile:** gowsi
- Active:** checked
- Other Options:** Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User

## Step 5:

Now create two users by enter into the Setup-quick search[User] and then click on new user after clicking that you need to create two user along with the profile as gowsi which we have created on the step 2.once the one user has been created click on the save&new so that you can create the second user and there the user name can been created with alternate name but with the same user profile and once the two user are create click on save.



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar is titled 'Users' and includes links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. The main content area is titled 'All Users' and displays a list of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The list includes users like 'A\_User', 'B\_User', 'Chatter Expert', 'S.T\_GOWSIKA DEVI', 'S\_gowsika11', 'User\_Integration', and 'User\_Security'. The 'Profile' column for most users shows 'gowsi' with a checkmark, except for 'Salesmanager' and 'Chatter Free User' which show 'SalesManager' and 'Chatter Free User' respectively. The 'Active' column shows checkmarks for all users.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit   Login	A_User	ua	2k30it08@kiot.ac.in	SF admin	<input checked="" type="checkbox"/>	gowsi
<input type="checkbox"/>   Edit   Login	B_User	ub	gowzikadevist@gmail.com		<input checked="" type="checkbox"/>	Salesmanager
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty.00d5j00000cirleav.d0tg9bh91g3@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit	S.T_GOWSIKA DEVI	GS_T	gowzikadevi@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit   Login	S_gowsika11	gs	gowzikadevist@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	gowsi
<input type="checkbox"/>   Edit	User_Integration	integ	integration@00d5j00000cirleav.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@00d5j00000cirleav.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## Step 6:

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

Setup Home Object Manager

Permission Sets

Permission Set Create

Enter permission set information

Label:

API Name: salesmanager

Description: salesmanager

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.](#)

Setup Home Object Manager

Permission Sets

Permission Set Create

Enter permission set information

Label: permission12

API Name: permission12

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.](#)

## Step 7:

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

The screenshot shows the Salesforce Setup interface with the URL [knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008Tdql%3Fs%3DEntityPermissions&o=Account&isdp=p1](https://knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008Tdql%3Fs%3DEntityPermissions&o=Account&isdp=p1). The left sidebar is expanded, showing sections like Hyperforce Assistant, Lightning Experience Transition Assistant, Users, Feature Settings, Digital Experiences, Sales, Accounts, Salesforce Scheduler, and Assignment Policies. The 'Permission Sets' section is selected. The main content area displays the 'Permission Sets' page for 'permission12'. The 'Object Settings' dropdown is set to 'Accounts'. Under 'Object Permissions', checkboxes are present for Read, Create, Edit, Delete, View All, and Modify All. Under 'Field Permissions', checkboxes are present for 'Account Name' under both 'Read Access' and 'Edit Access' columns.

The screenshot shows the Salesforce Setup interface with the URL [knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008Tdql%3Fo%3DAccount%26...](https://knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008Tdql%3Fo%3DAccount%26...). The left sidebar is expanded, showing sections like Hyperforce Assistant, Lightning Experience Transition Assistant, Users, Feature Settings, Digital Experiences, Sales, Accounts, Salesforce Scheduler, and Assignment Policies. The 'Permission Sets' section is selected. The main content area displays the 'Permission Sets' page for 'permission12'. The 'Object Settings' dropdown is set to 'Accounts'. Under 'Object Permissions', checkboxes are present for Read, Create, Edit, Delete, View All, and Modify All. Under 'Field Permissions', checkboxes are present for 'Account Name' under both 'Read Access' and 'Edit Access' columns.

## Step 8

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

knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OP55j000008Tdql/PermissionSetAssignment/home

Setup Home Object Manager

Search Setup

... > SETUP > PERMISSION SET 'PERMISSION12'

permission12

Current Assignments

Add Assignment

No assignments defined.

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

- Permission Set Groups
- Permission Sets

Digital Experiences

- Settings
- Functions

Sales

Accounts

- Person Accounts

Salesforce Scheduler

- Assignment Policies
- Salesforce Scheduler



knowledgeinstituteoftech-bc-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OP55j000008Tdql/PermissionSetAssignment/new

Setup Home Object Manager

Search Setup

All Users

1 item selected

Full Name ↑	AI... ↓	Username	Role	A... ↓	Profile
Chatter Expert	Chatter	chatty.00d5j00000cirtjeav.dqtg98bh91q3@chatt...	Chatter Free User		
GOSIKA DEVI S T	GS T	gowsikadevi@naanmudhalvan.com	System Administrator		
gowsika11 S	gs	gowsikadevis@gmail.com	Director, Channel Sales		gowski
Integration User	integ	integration@00d5j00000cirtjeav.com	Analytics Cloud Integration Us...		
Security User	sec	insightsecurity@00d5j00000cirtjeav.com	Analytics Cloud Security User		
User A	ua	2k20it08@kiot.ac.in	SF admin		gowski

Cancel Next

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

- Permission Set Groups
- Permission Sets

Digital Experiences

- Settings
- Functions

Sales

Accounts

- Person Accounts

Salesforce Scheduler

- Assignment Policies
- Salesforce Scheduler

Click on next.

The screenshot shows the 'Permission Set Assignment' screen in Salesforce. A user named 'gowsika11 S' is selected in the 'Selected Users' list. The 'Expires On' field is set to 'Never Expires'. The 'Assign' button is visible at the bottom right.

Now click on Assign.

The screenshot shows the confirmation screen after assignment. It displays a success message: '1 assignments were successful.' and an 'Assignment Summary' table with one row for 'gowsika11 S'.

Now the specific access for the gowsika11 user has been assigned successfully

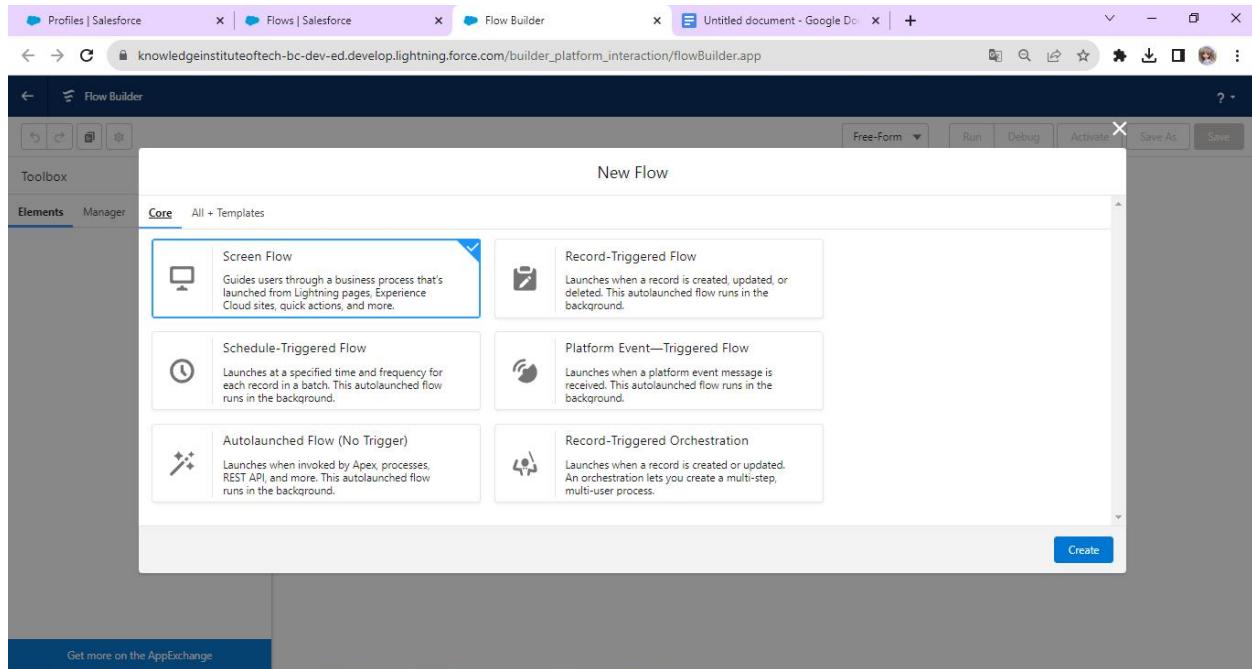
#### 4.Create a screen flow for a basic survey to fill in the details for any form

##### Step 1: Access Salesforce Setup

1. Log in to your Salesforce account.
2. Click on your profile picture or the gear icon in the upper-right corner.
3. Select "Setup" from the dropdown menu.

## Step 2: Create a Flow

1. In the Setup menu, type "Flows" in the Quick Find box and select "Flows."



## Step 3: Add Screen Elements

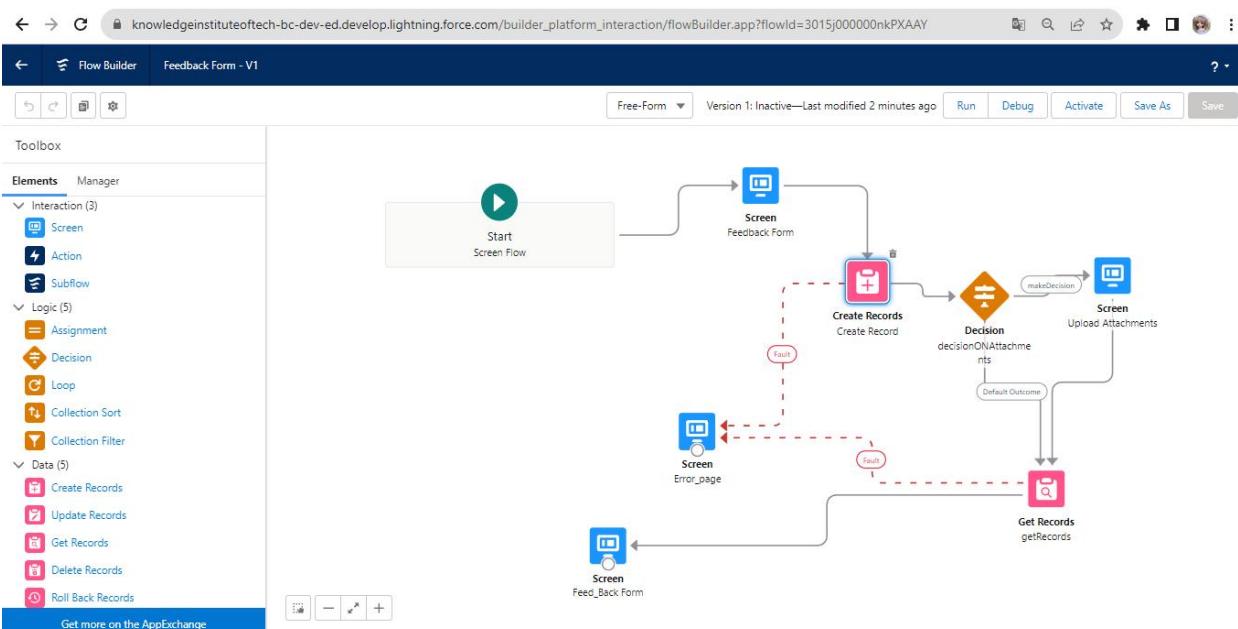
1. Drag and drop a "Screen" element onto the canvas. This will be the starting point of your flow.
2. Click on the screen element to configure it.
3. Add text and instructions on this screen to inform users about the survey and what information is required.
4. Drag and drop the appropriate input elements (e.g., text fields, radio buttons, checkboxes) onto the screen for users to input their survey details. You can find these elements in the palette on the left.
5. Configure each input element with the appropriate labels, help text, and validation rules if necessary

Salesforce Flows Setup Home

**Flows**

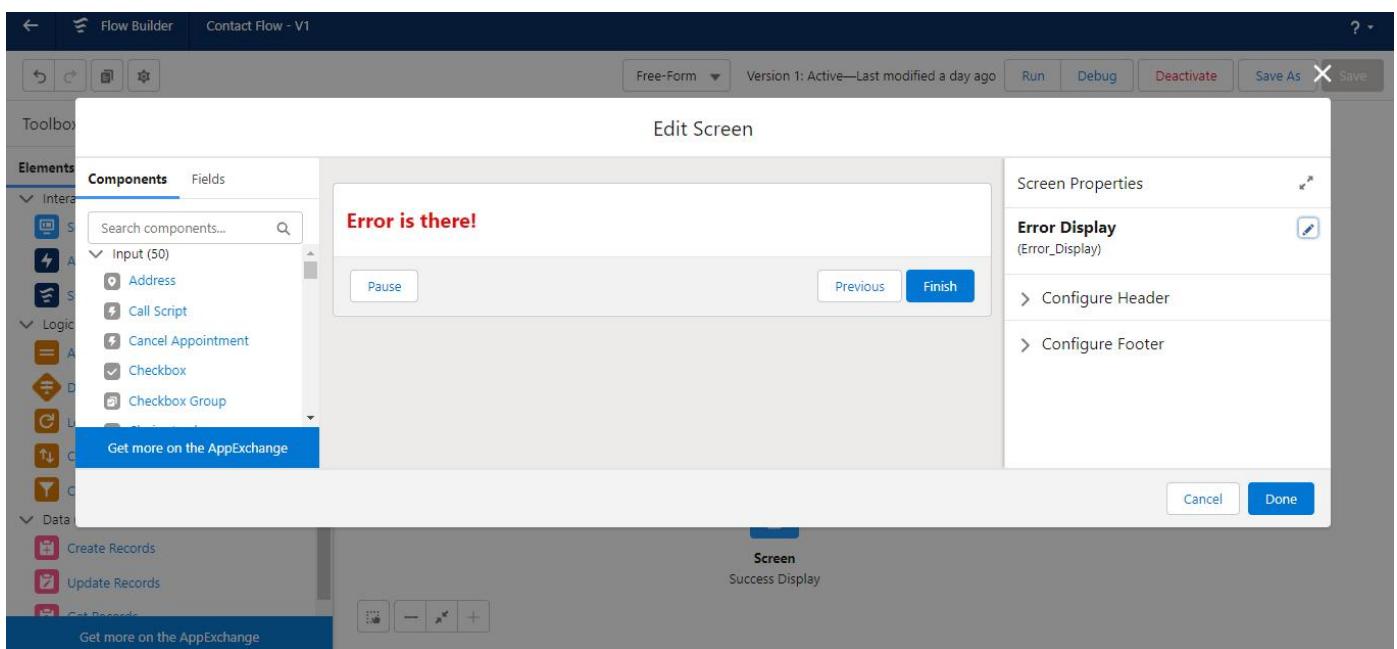
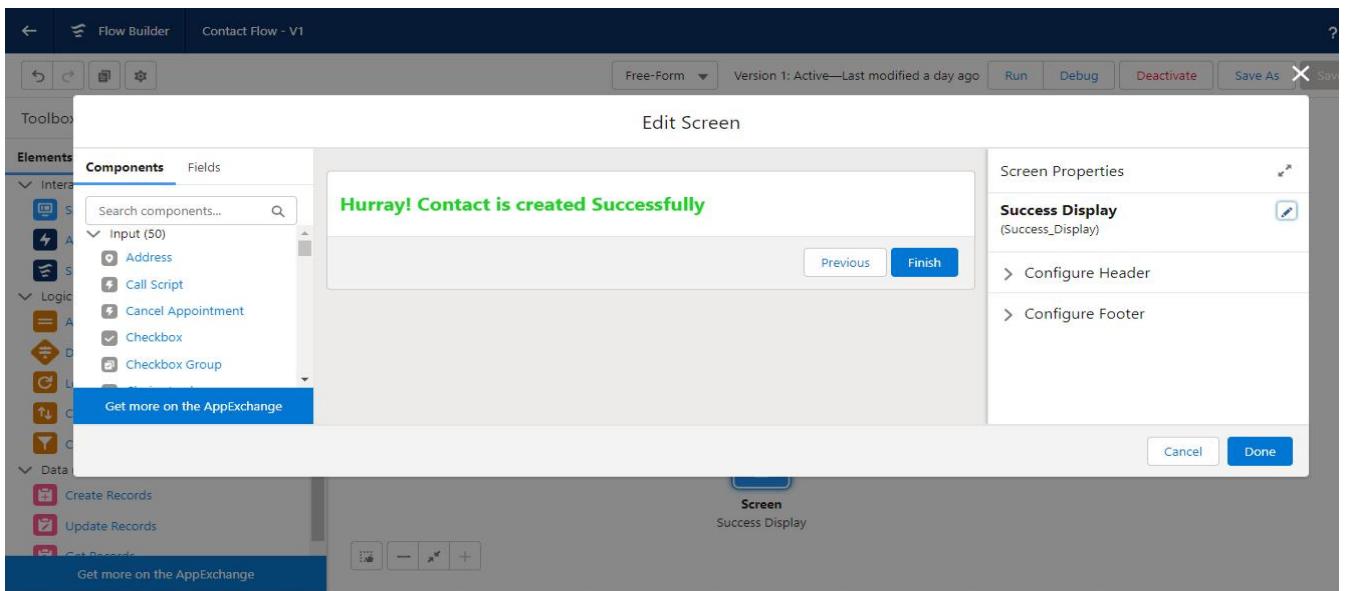
All Flows

Flow Label	Process Type	Active	Template	Package State	Packaged	Last Modified	Last Modified By
Basic Approval Request	Flow Orchestration for CMS	✓	✓	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Cancel Item Flow	Screen Flow	□	✓	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	□	✓	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	□	✓	Managed-Installed			
CMS: Check Whether Any Step is Completed	Evaluation Flow	✓	✓	Managed-Installed			
CMS: Notify Content Author	Screen Flow	✓	✓	Managed-Installed			
CMS: Review Content	Screen Flow	✓	✓	Managed-Installed			
CMS: Submit Content for Review	Screen Flow	✓	✓	Managed-Installed			
CMS: Withdraw Review Request	Screen Flow	✓	✓	Managed-Installed			
Create a Case	Screen Flow	✓	✓	Managed-Installed			
Create Order Summary Flow	Autolaunched Flow	□	✓	Managed-Installed			



## Step 4: Create Variables

- If you want to capture and store the survey data, you need to create variables to hold the data. To do this, click on the "Manager" tab in the palette and create variables for each field on the screen. Make sure the variable types match the data types of the corresponding fields



[Run Again](#)

Debug Details



## Debug flow

## Debug Options

- Run the latest version of each flow called by subflow elements
- Show details of what's executed and render flow in Lightning runtime  ⓘ
- Run flow as another user  ⓘ

## Input Variables

This flow has no variables that allow input access, or all its input variables are collection variables or Apex-defined variables, which aren't supported for input when debugging.

[Run](#)[Run Again](#)

## Contact Flow

\*First Name

\*Last Name

\*Email

Phone

 Attachments[Next](#)

## Debug Details

**GET RECORDS:** getRecords

Find all Contact records where:  
Id Equals {iconId} (003j00001BdHivAAF)  
Store the values of these fields in getRecords: Id  
**Result**  
Successfully found records.

**Transaction Committed**

Any records that the flow was ready to create, update, or delete were committed to the database.

**SCREEN:** Success Display

**Display Text:** consuccessDisp  
Value at run time:

**Hurray! Contact is created Successfully**

**Selected Navigation Button:** NEXT

**Transaction Committed**

Any records that the flow was ready to create, update, or delete were committed to the database.

The screenshot shows the Salesforce Flow Builder interface. On the left, there is a success message box with the text "Hurray! Contact is created Successfully". Below it are "Previous" and "Next" buttons. On the right, there is a "Run Again" button at the top. Below it is a "Debug Details" section containing several boxes of information:

- How the Interview Started**: VIGNAYA G S (005j000009Qvhk) started the flow interview.  
API Version for Running the Flow: 58
- Transaction Committed**: Any records that the flow was ready to create, update, or delete were committed to the database.
- SCREEN: Contact Form**  
**Textbox: First\_Name**: Label: First Name  
Value at run time: Pooja
- Textbox: Last\_Name**: Label: Last Name  
Value at run time: N
- Lightning Component: conEmailAddress**: Screen component: flowruntime:email  
Inputs:  
required = (true)  
value = conEmailOp (null)  
Outputs:  
disabled = false

## Step 5: 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 6: Connect the Screens

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

## Step 7: 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 8: Activate the Flow

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

