

SALESFORCE DEVELOPER (NAAN MUDHALVAN)

ASSIGNMENT 1

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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 modal window titled 'New Custom Object' is open, displaying the 'Custom Object Definition Edit' screen. The 'Custom Object Information' section includes fields for 'Label' (set to 'College Name') and 'Plural Label' (set to 'College Names'). The 'Object Name' field is also set to 'College Name'. There is a 'Description' text area and a 'Content Name' dropdown set to 'None'. The 'Record Name Label and Format' section shows 'Record Name' as 'College Name' and 'Data Type' as 'Text'. The 'Optional Features' section contains several checkboxes for features like 'Allow Reports' and 'Allow Activities'. The 'Object Classification' section has checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has 'Allow Search' unchecked. The 'Object Creation Options' section has 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object' both unchecked. At the bottom of the modal are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes links for 'Service', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Cases', 'Reports', 'Dashboards', 'Tainers', 'departments', 'TAINER NAMES', and 'Books'. The main content area displays a 'Recently Viewed' list for the 'tainer' object. The list shows three items: 'harry' (ranked 1), 'vignesh' (ranked 2), and 'hari' (ranked 3). A search bar at the top right allows users to search this list. The URL in the browser is kiot54-dev-ed.lightning.force.com/lightning/o/tainer_c/list?filterName=Recent.

Create the "Child_Object__c" custom object if you haven't already.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new custom object is being created with the following details:

- Label:** TAINER NAME
- Plural Label:** TAINER NAMES
- Object Name:** books
- Description:** (Empty text area)
- Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window
- Content Name:** -None-

The 'Record Name' field is also populated with 'books Name'. The 'Data Type' is set to 'Text'.

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 the Salesforce Object Manager interface. The left sidebar is titled 'SETUP > OBJECT MANAGER' and contains a list of options: Details, Fields & Relationships (which is 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 content area is titled 'NEW CUSTOM FIELD' and 'TAINER NAME'. It displays 'Step 1. Choose the field type'. A sub-section titled 'Data Type' shows various options: None Selected, Auto Number, Formula, Roll-Up Summary, Lookup Relationship, Master-Detail Relationship (selected), and External Lookup Relationship. Each option has a detailed description. At the top right of the step section are 'Next' and 'Cancel' buttons. The overall interface is light blue and white.

The screenshot shows the Salesforce Object Manager interface. The left sidebar is identical to the previous screenshot. The main content area is titled 'TAINER NAME' and 'New Relationship'. It displays 'Step 2. Choose the related object'. A sub-section titled 'Select the other object to which this object is related' shows a dropdown menu labeled 'Related To' with 'tainer' selected. At the top right of the step section are 'Previous', 'Next', and 'Cancel' buttons. The overall interface is light blue and white.

The screenshot shows the Salesforce Setup interface for creating a new relationship. The URL is kiot54-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5j000002BoIJ/FieldsAndRelationships/new. The page title is "TAINER NAME". The left sidebar under "Fields & Relationships" includes options like 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, and Triggers. The main content area is titled "New Relationship" and "Step 3. Enter the label and name for the lookup field". It shows fields for "Field Label" (TAINER NAME), "Field Name" (TAINER_NAME), "Description", "Help Text", "Child Relationship Name" (TAINER_NAMES), "Sharing Setting" (Read Only), "Allow reparenting" (unchecked), "Auto add to custom report type" (checked), and a "Lookup Filter" section. The status bar at the bottom right shows "03 October 2023", "10:38", and "03-10-2023".

The screenshot shows the continuation of the relationship creation process. The URL is kiot54-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5j000002BoIJ/FieldsAndRelationships/new. The page title is "TAINER NAME". The left sidebar remains the same. The main content area is titled "Step 4. Establish field-level security for reference field". It shows a table with columns for "Field-Level Security for Profile", "Visible" (checkbox), and "Read-Only" (checkbox). The table lists profiles: Analytics Cloud Integration User, Authenticated Website, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, and Customer Community User. Most profiles have both "Visible" and "Read-Only" checkboxes checked.

Setup > OBJECT MANAGER

TAINER NAME

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

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

Setup > OBJECT MANAGER

TAINER NAME

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

New Relationship

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.

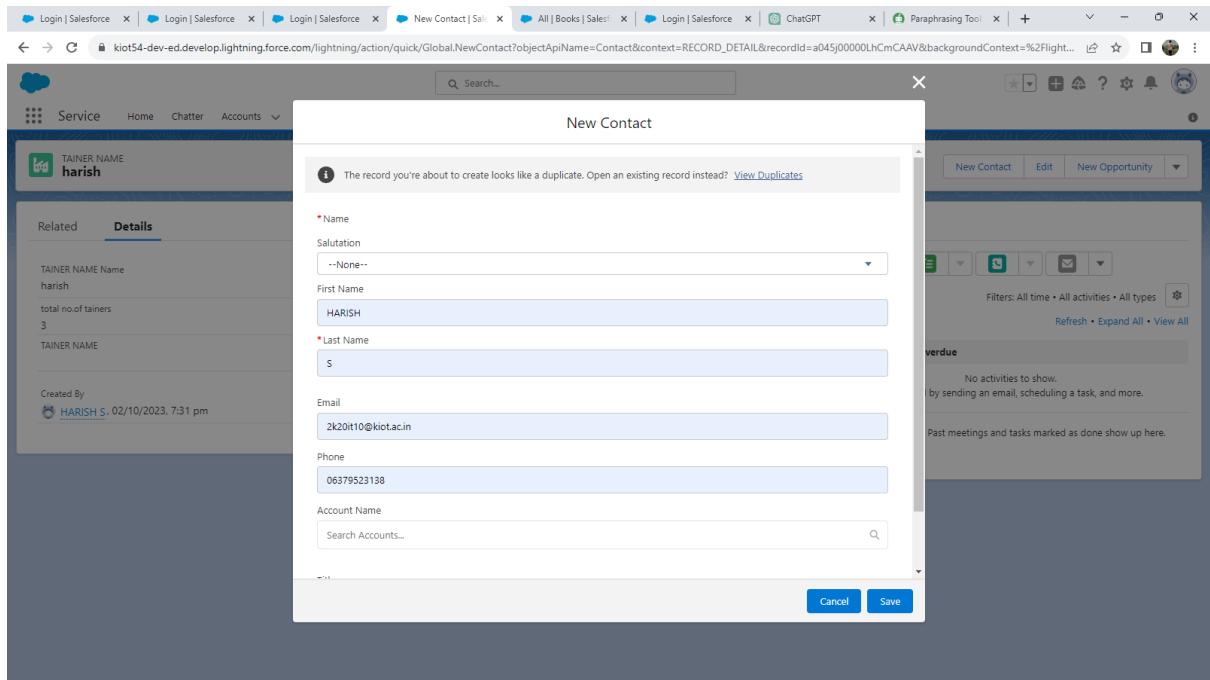
Related List Label:

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



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".

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

No Lightning component tabs have been defined

Lightning Page Tabs

No Lightning Page Tabs have been defined

Help for this Page

Setup Home Object Manager

college

Details

Fields & Relationships

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

New Custom Field

Step 5. Add to page layouts Step 5 of 5

Field Label: Total count
Data Type: Roll-Up Summary
Field Name: Total_count

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.

Add Field Page Layout Name
 college Layout

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

Previous Save & New Save Cancel

The screenshot shows the 'New Custom Field' setup page in Salesforce. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area is titled 'Step 4. Establish field-level security' with a sub-header 'Field Label: Total count, Data Type: Roll-Up Summary, Field Name: Total_count, Description:'. It displays a table of profiles and their visibility and edit rights. The table includes profiles like Analytics Cloud Integration User, Analytics Cloud Security User, Cloud Kicks Admin, Contact Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, customer, and Force.com - Ann Subscription User.

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

The screenshot shows the 'New Custom Field' setup page in Salesforce. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area is titled 'Step 3. Define the summary calculation' with a sub-header 'Master Object: college, Summarized Object: CDepartments'. It includes sections for 'Select Object to Summarize' (Master Object: college, Summarized Object: CDepartments), 'Select Roll-Up Type' (radio button selected for COUNT), 'Field to Aggregate' (None), and 'Filter Criteria' (radio button selected for 'All records should be included in the calculation').

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being configured is 'college'. The left sidebar lists various setup categories under 'Fields & Relationships'. The main panel is titled 'New Custom Field' and is on 'Step 2. Enter the details'. The form includes fields for 'Field Label' (Total count), 'Field Name' (Total_count), 'Description', and 'Help Text'. A checkbox 'Auto add to custom report type' is checked, with a note 'Add this field to existing custom report types that contain this entity'. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being configured is 'college'. The left sidebar lists various setup categories under 'Fields & Relationships'. The main panel is titled 'New Custom Field' and is on 'Step 1. Choose the field type'. It asks to 'Specify the type of information that the custom field will contain'. The 'Data Type' section lists several options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll Up Summary' (selected), 'Lookup Relationship', 'Master-Detail Relationship', 'External Lookup Relationship', and 'Boolean'. Each option has a detailed description below it. Navigation buttons at the bottom right include 'Next' and 'Cancel'.

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

Now you have successfully created a Master-Detail Relationship between the two custom objects and a Roll-Up Summary Field to calculate the total number of related records in Salesforce.

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.

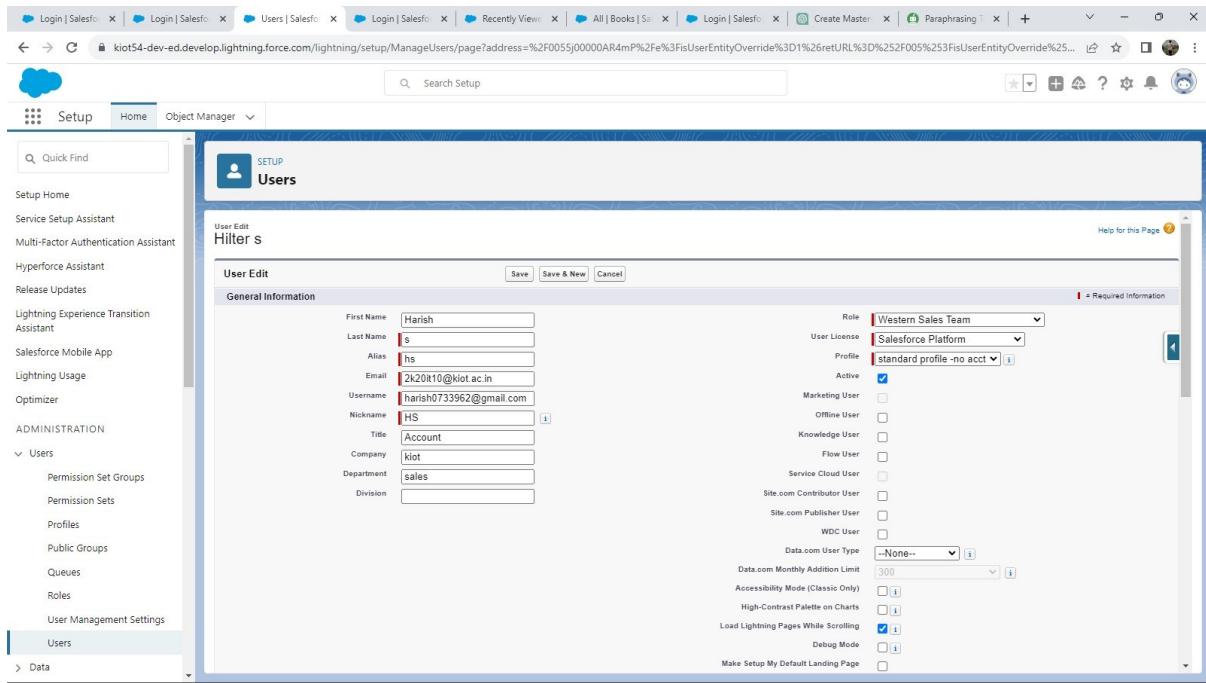
Assign a Password:

- 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.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty@00d500000c1rbea3.0kemuihsph@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	G_S_VIGNAYA	VG_S	vignaya@naamudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Salappan_User_Vignaya	usall	vignayav88@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Work.com Only User
<input type="checkbox"/>	Salappan_Vignaya	ysall	gsignaya@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	intec	integration@00d500000c1rbea3.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d500000c1rbea3.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	vignaya.ds	ovign	sakthivignaya08@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Work.com Only User
<input type="checkbox"/>	Vignaya_Sakthi	svign	vignayasa@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard User



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.

All items • Sorted by Account Name • Filtered by All accounts • Updated a few seconds ago

<input type="checkbox"/>	Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
1	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	HS
2	Dickenson plc		KS	(785) 241-6200	Customer - Channel	HS
3	Edge Communications		TX	(512) 757-6000	Customer - Direct	HS
4	Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	HS
5	GenePoint		CA	(650) 867-3450	Customer - Channel	HS
6	Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	HS
7	HARISH S	Tamil Nadu		06379523138		HS
8	Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	HS
9	Sample Account for Entitlements					autproc
10	sForce		CA	(415) 901-7000		HS
11	United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	HS
12	United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	HS
13	United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	HS
14	University of Arizona		AZ	(520) 773-9050	Customer - Direct	HS

Sharing Settings

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 recalculati

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓

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.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main content area displays a table of permission sets. The table columns are 'Action', 'Permission Set Label +', 'Description', and 'License'. The table lists various permission sets such as 'Access to activity', 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', 'Facility Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order Management Agent', 'Order Management Operations Manager', and 'Order Management Shopper'. Each row includes a checkbox for 'Action' and a 'Clone' button. The 'Description' column provides a brief overview of the permissions granted by each set. The 'License' column indicates the specific license required for each set, such as 'B2B Buyer Permission Set One Seat' or 'Commerce Merchandiser User Permission Set License Seat'. The bottom of the page shows pagination controls and a note about mobile app access.

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

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: V | Reset Password | Salesforce | + | - | □ | Finish update |

Setup Home Object Manager

Search Setup

Permission Sets

Permission Set 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

Help for this Page

User Management Settings

Users

Profile Groups

Queues

Roles

Action Link Templates

Actions & Recommendations

App Menu

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: V | Reset Password | Salesforce | + | - | □ | Finish update |

Setup Home Object Manager

Search Setup

Permission Sets

salesmanager

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

Video Tutorial | Help for this Page

Permission Set Overview

Description: salesmanager
License: salesmanager
Namespace Prefix: GQPAL_S
Created By: GQPAL_S | 01/10/2023, 7:29 pm
Session Activation Required:
Last Modified By: GQPAL_S | 01/10/2023, 7:29 pm

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

Learn More

User Management Settings

Users

Profile Groups

Queues

Roles

Action Link Templates

Actions & Recommendations

App Menu

Screenshot of the Salesforce Setup interface showing the Permission Sets page for the 'salesmanager' permission set.

The left sidebar shows the navigation menu under 'Users':

- Permission Set Groups
- Permission Sets** (selected)
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

The main content area displays the 'Object Settings' tab for the 'salesmanager' permission set. It lists various objects and their permissions:

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 Invitees	--	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 for the 'salesmanager' permission set.

The left sidebar shows the navigation menu under 'Users':

- Permission Set Groups
- Permission Sets** (selected)
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

The main content area displays the 'Object Settings' tab for the 'salesmanager' permission set. It shows the 'Bank' object settings:

Tab Settings

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

Object Permissions

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

Field Permissions

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

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

Permission Sets

salesmanager

Object Settings | Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Save Cancel

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salesmanager

... > SETUP > PERMISSION SET 'SALESMANAGER'

Current Assignments

No assignments defined.

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App Menu

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. A modal window titled 'Select Users to Assign' is open, displaying a list of users under the heading 'All Users'. The user 'madhu b' is selected, indicated by a checked checkbox next to their name.

Full Name	Role	Profile
Amelia Ellington	Force.com - App Subscription User	
Chatter Expert	Chatter Free User	
Diya Adanna	UMS User	
GOPAL S	System Administrator	
Integration User	Analytics Cloud Integration User	
madhu b	salesmanage	
Security User	Analytics Cloud Security User	
sowmiya bala	Manager	

The screenshot shows the Salesforce Accounts page. At the top, there is a section titled 'Recently Viewed Accounts' which lists one account: 'HARISH S'.

Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
HARISH S	Tamil Nadu	06379523138		HS	

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

1.Create a New Permission Set:

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

2. Define Object Permissions:

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

3. Assign Permission Sets:

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

4. Remove Delete Access from Profile:

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

Profile Creation:

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The profile 'standard profile -no acct' is selected. The page includes sections for 'Profile Detail' (Name: standard profile -no acct, User License: Salesforce Platform, Description: , Created By: HARISH_S, 30/09/2023, 8:21 pm, Modified By: HARISH_S, 02/10/2023, 12:36 pm), 'Page Layouts' (Standard Object Layouts, Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, Asset Relationship, Assigned Resource), and 'Operating Hours' (Order, Order Product, Payment, Payment Authorization, Payment Authorization Adjustment, Payment Gateway, Payment Gateway Log, Payment Group).

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 Pages](#) | [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	Custom Profile	<input checked="" type="checkbox"/>
User License	Customer Community		
Description			
Created By	HARISH S 02/10/2023, 12:22 pm	Modified By	HARISH S 02/10/2023, 12:22 pm

Page Layouts

Global	Order
Global Layout [View Assignment]	Order Layout [View Assignment]
Email Application	Order Product [View Assignment]
Home Page Layout	Payment Layout [View Assignment]
Account	Payment Authorization [View Assignment]
Alternative Payment Method	Payment Authorization Adjustment [View Assignment]
Appointment Invitation	Payment Gateway [View Assignment]
Asset	Payment Gateway Log [View Assignment]
Asset Relationship	WhatsApp [View Assignment]
Arrendamiento	Investment Group [View Assignment]

Basic Access

	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View All	Modify All
Appointment Categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Appointment Invitations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Appointment Topic Time Slots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Assets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Authorization Forms	<input type="checkbox"/>					
Authorization Form Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Authorization Form Data Uses	<input type="checkbox"/>					
Authorization Form Texts	<input type="checkbox"/>					
Background Operations	<input type="checkbox"/>					
Business Brands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Carts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Cases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Communication Subscriptions	<input type="checkbox"/>					
Communication Subscription Channel Types	<input type="checkbox"/>					
Communication Subscription Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Communication Subscription Timings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

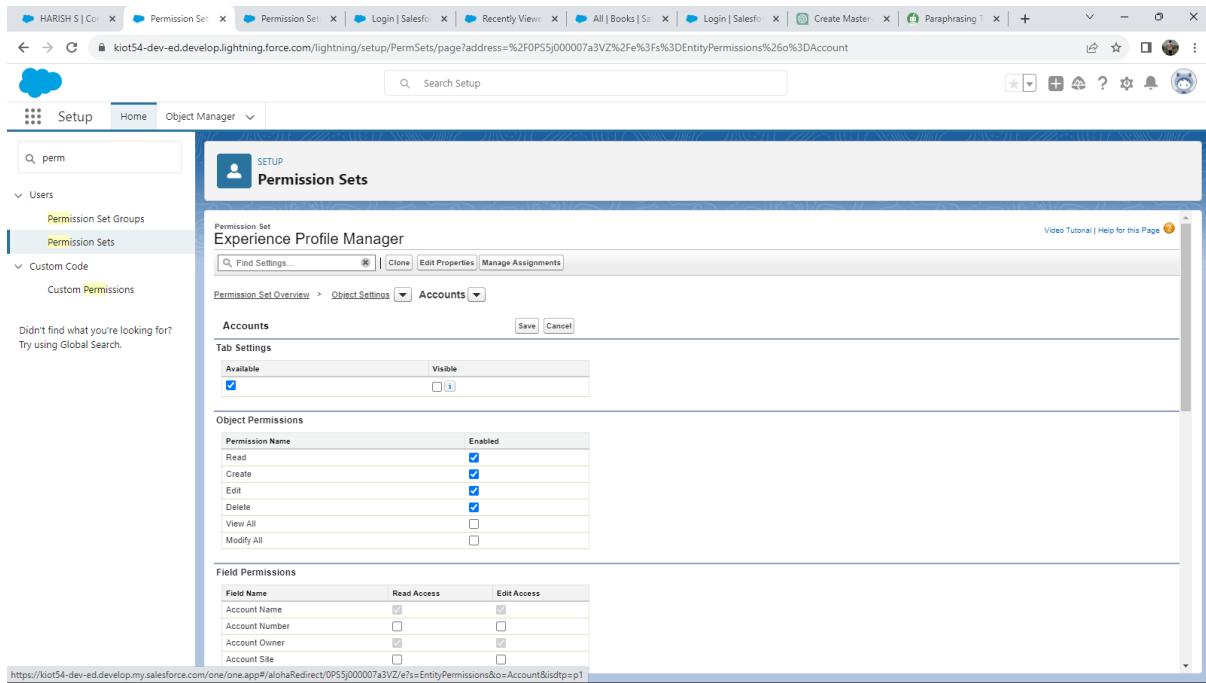
Basic Access

	Read	Create	Edit	Delete	View All	Modify All
Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Images	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Incidents	<input type="checkbox"/>					
Individuals	<input type="checkbox"/>					
Invoices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Legal Entities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Locations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Location Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Operating Hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Party Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Price Books	<input checked="" type="checkbox"/>					
Products	<input checked="" type="checkbox"/>					
Promotions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Return Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Sellers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Service Appointments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Service Resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Permission Sets:

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The current page is 'Permission Sets' under 'Experience Profile Manager'. The permission set is named 'Experience_Profile_Manager' with an API name of 'Experience_Profile_Manager'. It is licensed for 'Salesforce' and was created by 'HARISH S' on 22/08/2023 at 10:42 am. The 'Assigned Apps' section lists various app permissions such as 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 for managing Profiles. The current page is 'Profiles'. Under 'Custom Object Permissions', it displays permissions for 'Books', 'departments', and 'harishs' objects. For each object, it shows basic access (Read, Create, Edit, Delete, View All, Modify All) and data administration (Read, Create, Edit, Delete, View All, Modify All). Under 'Session Settings', the session times out after 2 hours of inactivity. Under 'Password Policies', the user password expires in 90 days, has 3 passwords remembered, and a minimum length of 8. It also includes requirements for complexity (must include alpha and numeric characters), password history (cannot contain previous 10), maximum invalid login attempts (10), and lockout effective period (15 minutes).



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.

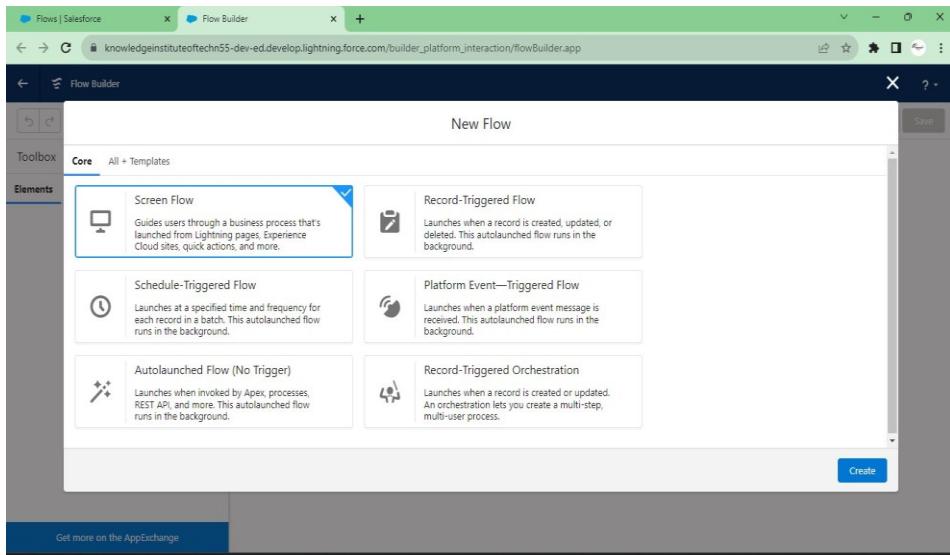
4. Create a screen flow for a basic survey to fill in the details for any form.

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".

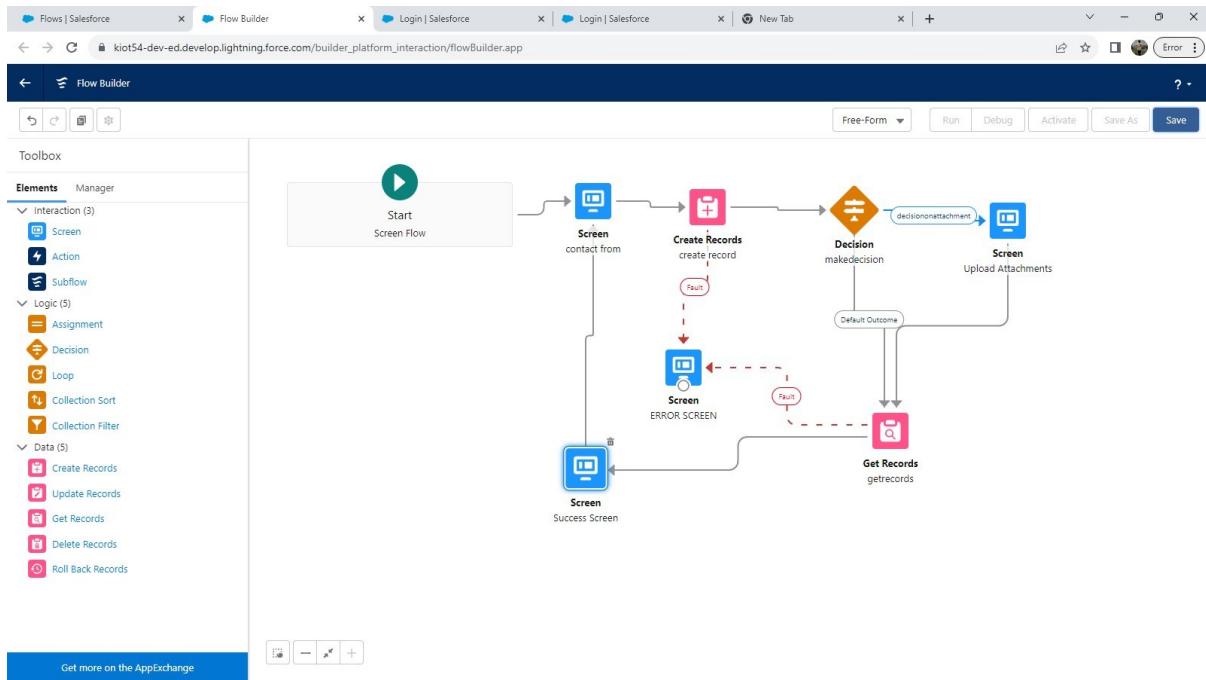
Step 2: Create a flow

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



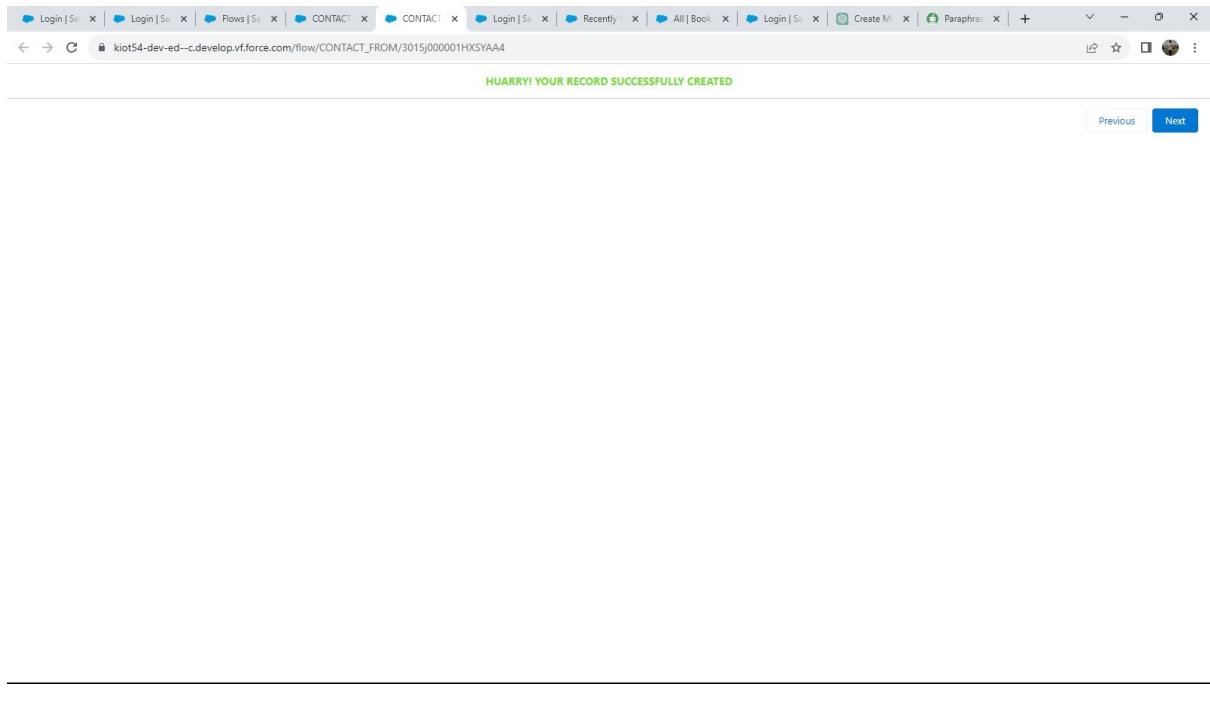
Step 3 : Add Screen Elements

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.



Search Setup

Setup Home Object Manager

Flow Definitions All Flows

Flow Label	Process Type	Active	Templ...	Package State	Packa...	Last Mo...	Last Modified Date
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Book Appointment from invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
CMS: Check Whether Any Step is Completed	Evaluation Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
CMS: Notify Content Author	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
CMS: Review Content	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
CMS: Submit Content for Review	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
CMS: Withdraw Review Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
CONTACT FROM	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	HARISH S	02/10/2023, 1:58 pm	
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Create Order Summary Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Create Process Exception Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			

31°C Partly cloudy 20:21 02-10-2023

The screenshot shows the Salesforce Setup interface with the 'Flows' tab selected. On the left, a sidebar lists various categories like Apps, Process Automation, and Workflow Actions. The 'Flows' category under 'Process Automation' is expanded, showing sub-options such as 'Automation Home (Beta)', 'Flows', 'Migrate to Flow', 'Paused And Failed Flow', 'Interviews', 'Process Builder', 'Workflow Actions', 'Email Alerts', 'Field Updates', 'Outbound Messages', 'Send Actions', 'Tasks', 'Workflow Rules', 'Environments', 'Monitoring', and 'Identity'. The main content area displays a table titled 'Flow Definitions All Flows'. The table has columns for 'Flow Label', 'Process Type', 'Active', 'Template', 'Package State', 'Packaged By', 'Last Modified Date', and 'Last Modified By'. There are 35 items listed, sorted by flow label. One row is highlighted: 'CONTACT FROM' (Screen Flow, Active, Template, Unmanaged, HARISH S, 02/10/2023, 1:58 pm). Other rows include 'CMS: Notify Content Author', 'CMS: Review Content', 'CMS: Submit Content for Review', 'CMS: Withdraw Review Request', 'Create a Case', 'Create Order Summary Flow', 'Create Process Exception Flow', 'Create Waitlist', 'Discount Flow', 'Even Exchange Flow', 'Find Contact Associated with Messaging Session', 'Generate Appointment Invitation', 'Inbound Cancel Appointment', 'Inbound Modify Appointment', and 'Inbound New Appointment'.

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.