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**Salesforce Developer(Course)**  
**Assignment no 1**

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Year & Dep : 4<sup>th</sup> year & IT  
Batch : 2024  
Zone no : Zone 8

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

Solution:

### Step 1: Create Custom Objects

Assuming you have two custom objects, let's call them "College\_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 Salesforce Setup interface with the following details:

- Page Title:** New Custom Object
- Section:** Custom Object Definition Edit
- Custom Object Information:**
  - Label: college (Example: Account)
  - Plural Label: colleges (Example: Accounts)
  - Starts with vowel sound:
- Object Name:** college (Example: Account)
- Description:** (Large 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:**
  - Record Name: college 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
  - 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

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main title is 'New Custom Object'. A message bar at the top indicates that permissions for the object are disabled by default. The 'Custom Object Definition Edit' section contains fields for 'Label' (set to 'department') and 'Plural Label' (set to 'departments'). There is also a checkbox for 'Starts with vowel sound'. The 'Object Name' field is set to 'department' with an example of 'Account'. A 'Description' text area is present. Under 'Context-Sensitive Help Setting', the 'Open the standard Salesforce.com Help & Training window' option is selected. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section includes a 'Record Name' field set to 'Department Name' with an example of 'Account Name' and a 'Data Type' dropdown set to 'Text'. The 'Optional Features' section has several checkboxes: 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Object Classification' section shows three checked checkboxes: 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has a 'Allow Search' checkbox. The 'Object Creation Options' section has two checkboxes: 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

## 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.

The screenshot shows the Salesforce Setup interface for the object 'CDepartment'. The left sidebar contains navigation links for 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, and Validation Rules. The main 'Details' tab is selected. The right pane displays various configuration settings for the CDepartment object, including:

- Description: CDepartment
- API Name: CDepartment\_\_c
- Custom: ✓
- Singular Label: CDepartment
- Plural Label: CDepartments
- Enable Reports
- Track Activities
- Track Field History
- Deployment Status: Deployed
- Help Settings
- Standard salesforce.com Help Window

At the top right, there are 'Edit' and 'Delete' buttons.

The screenshot shows the 'New Relationship' step 3 of 6 in the Salesforce setup. The left sidebar is identical to the previous screenshot. The main area is titled 'CDepartment New Relationship' and shows the configuration for a new lookup relationship:

**Step 3. Enter the label and name for the lookup field**

Field Label: college  
Field Name: college  
Description:   
Help Text:

Child Relationship Name: CDepartments  
Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records:  
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.  
 Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting:  Child records can be reparented to other parent records after they are created  
Auto add to custom report type:  Add this field to existing custom report types that contain this entry

At the bottom, there is a 'Lookup Filter' section.

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

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

1. Still on the "College\_\_c" settings, go to "Fields & Relationships."

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

The screenshot shows the Salesforce Object Manager interface for the 'CDepartment' object. The 'Fields & Relationships' tab is selected. A table lists the following fields:

| FIELD LABEL      | FIELD NAME       | DATA TYPE              | CONTROLLING FIELD | INDEXED |
|------------------|------------------|------------------------|-------------------|---------|
| college          | college__c       | Master-Detail(college) |                   | ✓       |
| Created By       | CreatedById      | Lookup(User)           |                   |         |
| Department Name  | Name             | Text(80)               |                   | ✓       |
| Last Modified By | LastModifiedById | Lookup(User)           |                   |         |

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. The left sidebar includes 'User Interface' and 'Rename Tabs and Labels'. The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section has a 'New' button and a 'What Is This?' link. Under 'Custom Object Tabs', there is a table:

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

The screenshot shows the Salesforce Setup interface under the 'Object Manager' section for the 'college' object. The left sidebar lists various settings like 'Page Layouts', 'Buttons, Links, and Actions', and 'Validation Rules'. The main content area is titled 'New Custom Field' and is on 'Step 5. Add to page layouts'. It shows a table with field details and a checkbox for adding the field to specific page layouts. A note at the bottom says to click 'Save & New' to create more fields or 'Save' if done.

| 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.

The screenshot shows the Salesforce Object Manager interface for creating a new custom field named "Total count" on the "college" object. The field is defined as a Roll-Up Summary type with the name "Total\_count". The "Field-Level Security for Profile" section lists various user profiles with checkboxes for "Visible" and "Read Only" permissions. Most profiles have both checkboxes checked.

| Field Label                       | Field Name  | Visible                             | Read Only                           |
|-----------------------------------|-------------|-------------------------------------|-------------------------------------|
| Total count                       | Total_count | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 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 Salesforce Object Manager interface for creating a new custom field named "Total count" on the "college" object. The "Step 3. Define the summary calculation" section is active. It shows the "Master Object" as "college" and the "Summarized Object" as "CDepartments". Under "Select Roll-Up Type", the "COUNT" option is selected. The "Field to Aggregate" dropdown is set to "None". In the "Filter Criteria" section, the "All records should be included in the calculation" radio button is selected.

**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

Step 2 of 5

Previous Next Cancel

**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.
  - This 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.
- Master-Detail Relationship Creates a relationship type for parent-child relationships 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.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- True/False Allows users to select a True (checked) or False (unchecked) value.

Step 1

Next Cancel

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'college'. On the right side of the header are various icons for account management. Below the header, the page title is 'college'. The main content area has a sidebar on the left with links like 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', etc. The main panel is titled 'Fields & Relationships' and shows a table with four items. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data is as follows:

| 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) |                   | ✓       |

## 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 Setup interface with the 'Tabs' tab selected under 'User Interface'. The main content area is titled 'New Custom Object Tab' and 'Step 2: Add to Profiles'. It displays a list of user profiles on the left and a grid of 'Tab Visibility' dropdowns on the right. The first dropdown in the grid is set to 'Default On'. The top right corner of the grid has a status message 'Step 2 of 3'.

**Step 2: Add to Profiles**

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

Apply one tab visibility to all profiles [Default On]  
 Apply a different tab visibility for each profile

| Profile                                 | Tab Visibility |
|---|----------------|
| Analytics Cloud Integration User        | Default On     |
| Analytics Cloud Security User           | Default On     |
| Authenticated Website                   | Default On     |
| Authenticated Website                   | Default On     |
| Cloud Kicks Admin                       | Default On     |
| Contract Manager                        | Default On     |
| Cross Org Data Proxy User               | Default On     |
| Custom: Marketing Profile               | Default On     |
| Custom: Sales Profile                   | Default On     |
| Custom: Support Profile                 | Default On     |
| Customer                                | Default On     |
| Customer Community Login User           | Default On     |
| Customer Community Plus Login User      | Default On     |
| Customer Community Plus User            | Default On     |
| Customer Community User                 | Default On     |
| Customer Portal Manager Custom          | Default On     |
| Customer Portal Manager Standard        | Default On     |
| External Apps Login User                | Default On     |
| External Identity User                  | Default On     |
| Force.com - App Subscription User       | Default On     |
| Force.com - Free User                   | Default On     |
| Gold Partner User                       | Default On     |
| High Volume Customer Portal             | Default On     |
| High Volume Customer Portal User        | Default On     |
| Identity User                           | Default On     |
| Manager                                 | Default On     |
| Marketing User                          | Default On     |
| Minimum Access - Salesforce             | Default On     |
| Partner App Subscription User           | Default On     |
| Partner Community Login User            | Default On     |
| Partner Community User                  | Default On     |
| Read Only                               | Default On     |
| Research Manager                        | Default On     |
| Research Users                          | Default On     |
| Salesforce API Only System Integrations | Default On     |
| Sales User                              | Default On     |
| security profile                        | Default On     |
| Silver Partner User                     | Default On     |
| Solution Manager                        | Default On     |
| Standard Platform User                  | Default On     |
| Standard User                           | Default On     |
| System Administrator                    | Default On     |

Help for this Page [?](#)

Previous Next Cancel

Setup Home Object Manager ▾

Search Setup

tabs

User Interface

Rename **Tabs and Labels**

**Tabs**

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

## Tabs

### New Custom Object Tab

Help for this Page

**Step 1. Enter the Details** Step 1 of 3

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

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

Object:

Tab Style:

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

Enter a short description.

Description:

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a 'User Interface' section with 'Tabs' highlighted. The main content area is titled 'Step 3. Add to Custom Apps' and shows a list of custom apps with checkboxes for 'Include Tab'. Most checkboxes are checked.

| Custom App  | Include Tab                         |
|---|-------------------------------------|
| Platform (standard__Platform)                             | <input checked="" type="checkbox"/> |
| Sales (standard__Sales)                                   | <input checked="" type="checkbox"/> |
| Service (standard__Service)                               | <input checked="" type="checkbox"/> |
| Marketing (standard__Marketing)                           | <input checked="" type="checkbox"/> |
| Sample Console (standard__ServiceConsole)                 | <input checked="" type="checkbox"/> |
| High Volume Customer Portal User                          | <input checked="" type="checkbox"/> |
| Authenticated Website User                                | <input checked="" type="checkbox"/> |
| App Launcher (standard__AppLauncher)                      | <input checked="" type="checkbox"/> |
| Community (standard__Community)                           | <input checked="" type="checkbox"/> |
| Site.com (standard__Sites)                                | <input checked="" type="checkbox"/> |
| Salesforce Chatter (standard__Chatter)                    | <input checked="" type="checkbox"/> |
| Content (standard__Content)                               | <input checked="" type="checkbox"/> |
| Analytics Studio (standard__Insights)                     | <input checked="" type="checkbox"/> |
| Sales Console (standard__LightningSalesConsole)           | <input checked="" type="checkbox"/> |
| Service Console (standard__LightningService)              | <input checked="" type="checkbox"/> |
| Sales (standard__LightningSales)                          | <input checked="" type="checkbox"/> |
| Lightning Usage App (standard__LightningInstrumentation)  | <input checked="" type="checkbox"/> |
| Digital Experiences (standard__SalesforceCMS)             | <input checked="" type="checkbox"/> |
| Queue Management (standard__QueueManagement)              | <input checked="" type="checkbox"/> |
| Data Manager (standard__DataManager)                      | <input checked="" type="checkbox"/> |
| Bolt Solutions (standard__LightningBolt)                  | <input checked="" type="checkbox"/> |
| Salesforce Scheduler Setup (standard__LightningScheduler) | <input checked="" type="checkbox"/> |

Append tab to users' existing personal customizations

Search Setup

Home Object Manager Tabs

Did you find what you're looking for?  
Try using Global Search.

Step 3 of 3

**New Custom Object Tab**

Step 1 of 3

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

|           |             |
|-----------|-------------|
| Object    | CDepartment |
| Tab Style | Lightning   |

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

Splash Page Custom Link: [None](#)

Enter a short description.

Description:

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

**Lightning Experience App Manager**

20 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

| App Name ↑          | Developer Name           | Description   | Last Modified Date   | App ...   | Visi... |
|---------------------|--------------------------|---|----------------------|-----------|---------|
| All Tabs            | AllTabSet                |   | 14/07/2023, 10:47 am | Classic   | ▼       |
| Analytics Studio    | Insights                 | Build CRM Analytics dashboards and apps   | 14/07/2023, 10:47 am | Classic   | ▼       |
| App Launcher        | AppLauncher              | App Launcher tabs   | 14/07/2023, 10:47 am | Classic   | ▼       |
| Bolt Solutions      | LightningBolt            | Discover and manage business solutions designed for your industry.              | 14/07/2023, 10:47 am | Lightning | ▼       |
| Community           | Community                | Salesforce CRM Communities  | 14/07/2023, 10:47 am | Classic   | ▼       |
| Content             | Content                  | Salesforce CRM Content  | 14/07/2023, 10:47 am | Classic   | ▼       |
| Data Manager        | DataManager              | Use Data Manager to view limits, monitor usage, and manage recipes.             | 14/07/2023, 10:47 am | Lightning | ▼       |
| Digital Experiences | SalesforceCMS            | Manage content and media for all of your sites.                                 | 14/07/2023, 10:47 am | Lightning | ▼       |
| Lightning Usage App | LightningInstrumentation | View Adoption and Usage Metrics for Lightning Experience                        | 14/07/2023, 10:47 am | Lightning | ▼       |
| Marketing           | Marketing                | Best-in-class on-demand marketing automation                                    | 14/07/2023, 10:47 am | Classic   | ▼       |
| Platform            | Platform                 | The fundamental Lightning Platform  | 14/07/2023, 10:47 am | Classic   | ▼       |
| Queue Management    | QueueManagement          | Create and manage queues for your business.                                     | 14/07/2023, 10:47 am | Lightning | ▼       |
| Sales               | Sales                    | The world's most popular sales force automation (SFA) solution                  | 14/07/2023, 10:47 am | Classic   | ▼       |
| Sales               | LightningSales           | Manage your sales process with accounts, leads, opportunities, and more         | 14/07/2023, 10:47 am | Lightning | ▼       |
| Sales Console       | LightningSalesConsole    | (Lightning Experience) Lets sales reps work with multiple records on one screen | 14/07/2023, 10:47 am | Lightning | ▼       |
| Salesforce Chatter  | Chatter                  | The Salesforce Chatter social network, including profiles and feeds             | 14/07/2023, 10:47 am | Classic   | ▼       |

Salesforce Setup Home Object Manager

Search Setup

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.

Help for this Page

Custom Object Tabs

| Action     | Label             | Tab Style | Description |
|------------|-------------------|-----------|-------------|
| Edit   Del | Book1             | Box       |             |
| Edit   Del | CDepartments      | Lightning |             |
| Edit   Del | colleges          | Jewel     |             |
| 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

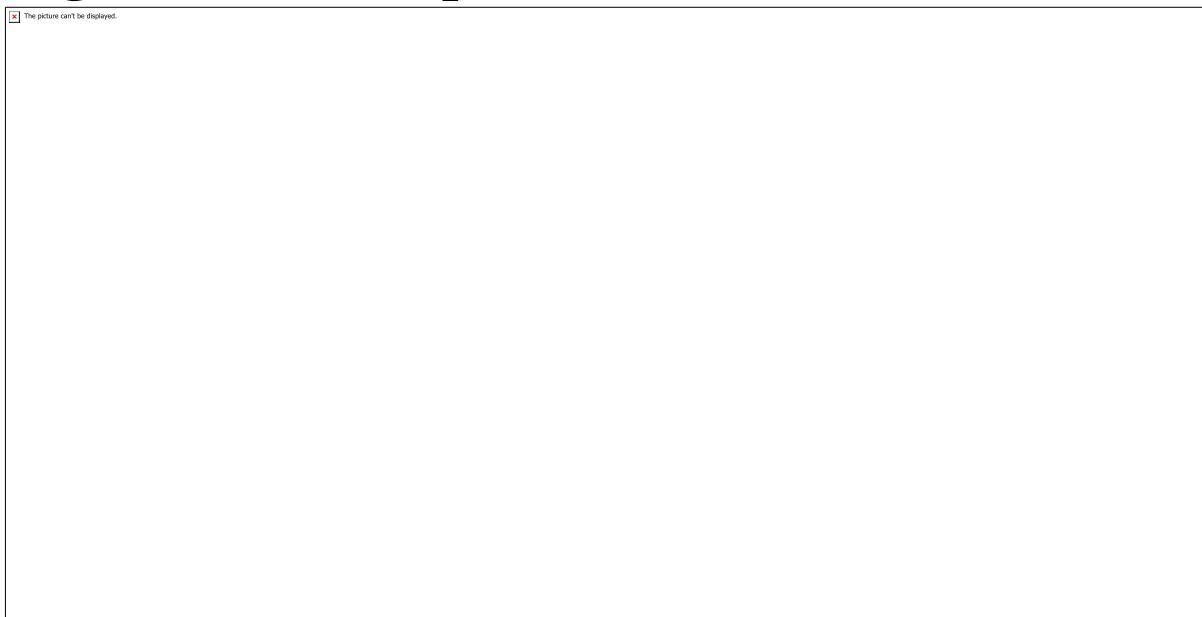
No Lightning Page Tabs have been defined.

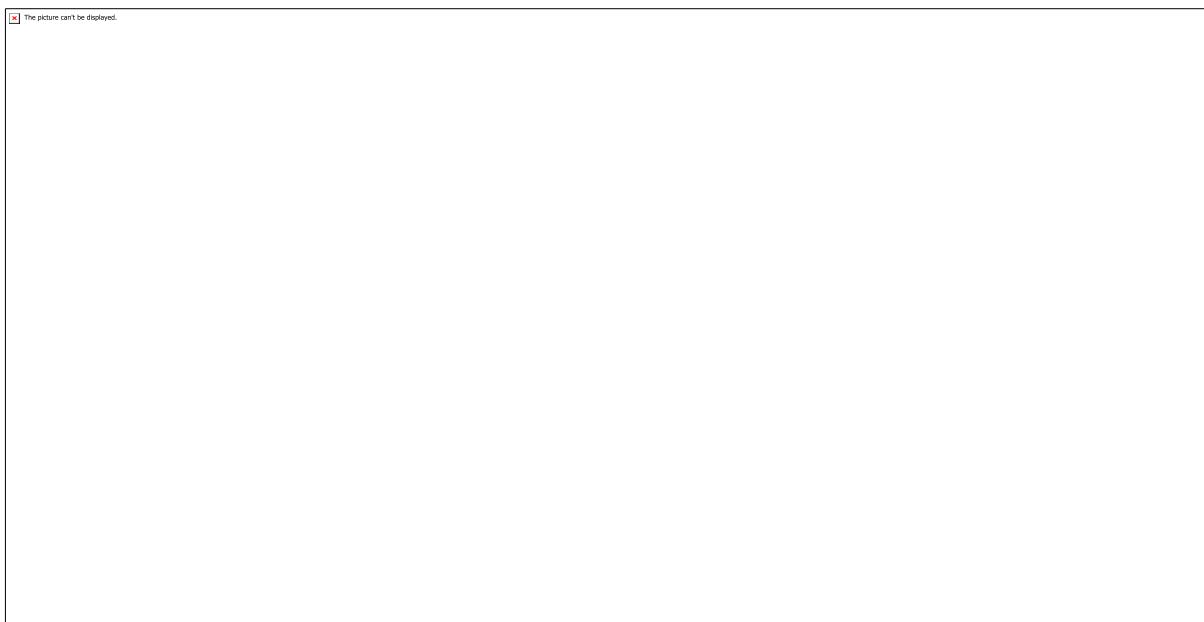
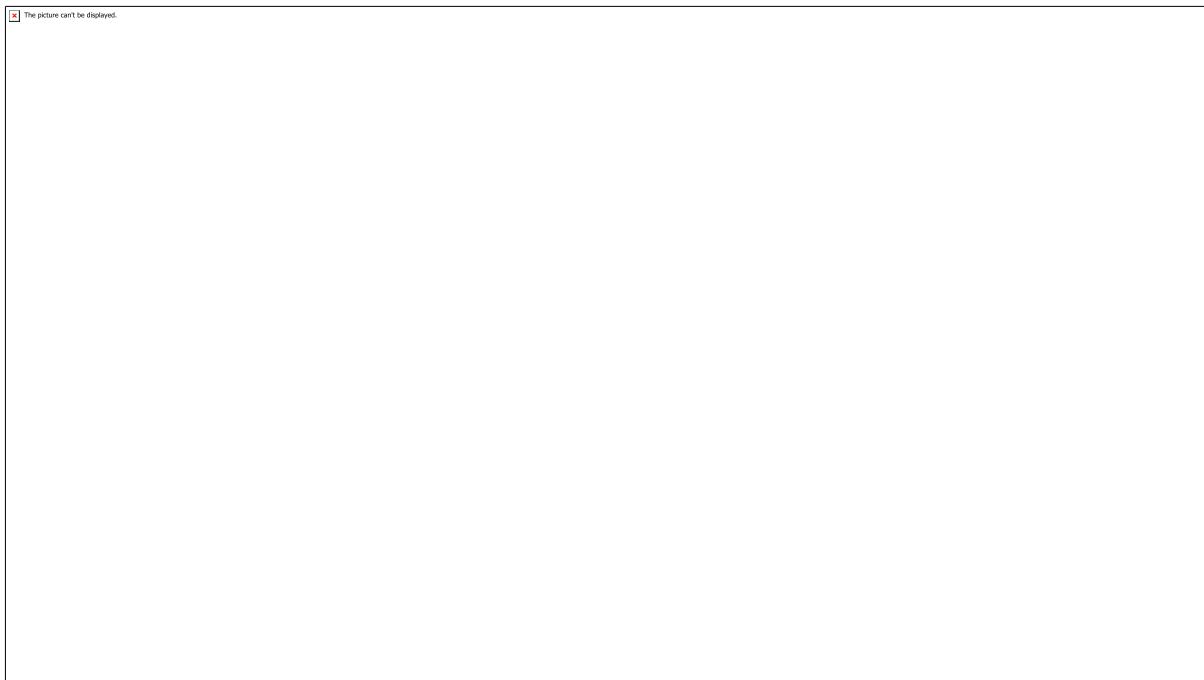
The picture can't be displayed.

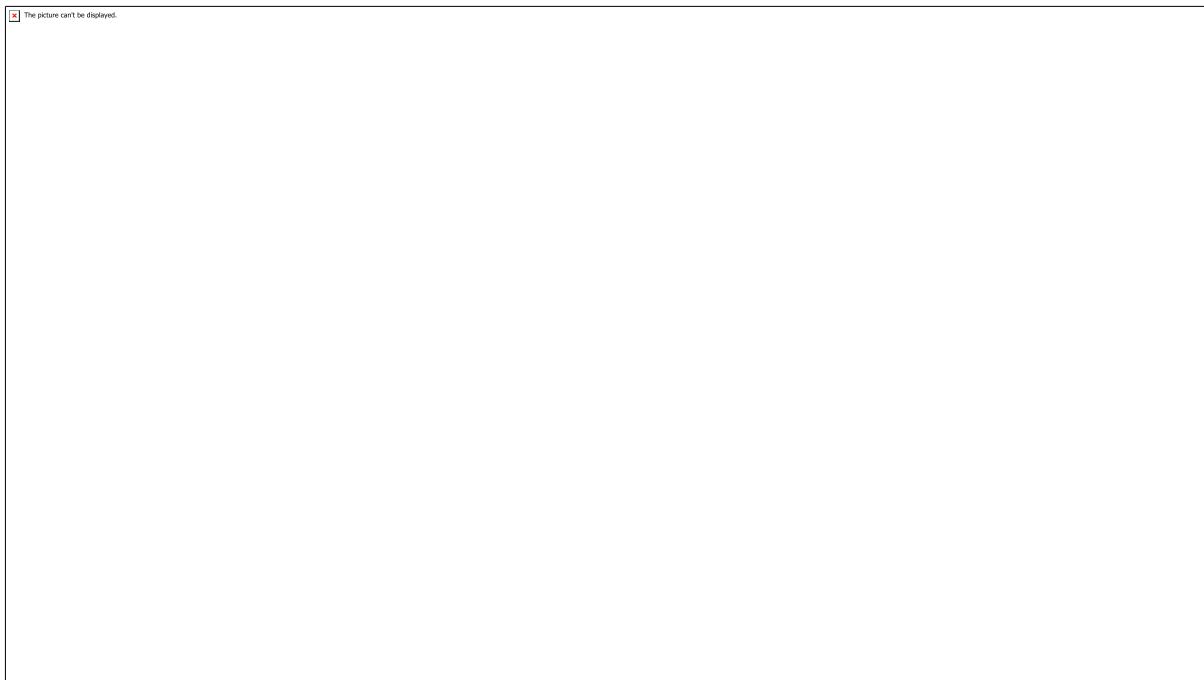
## **Conclusion:**

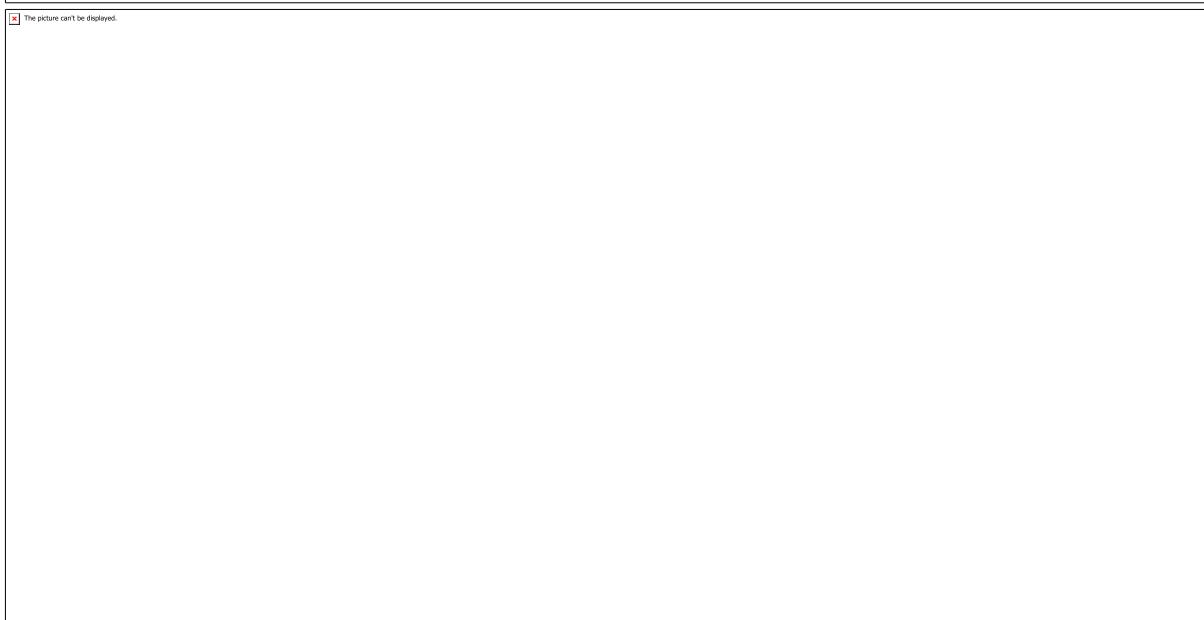
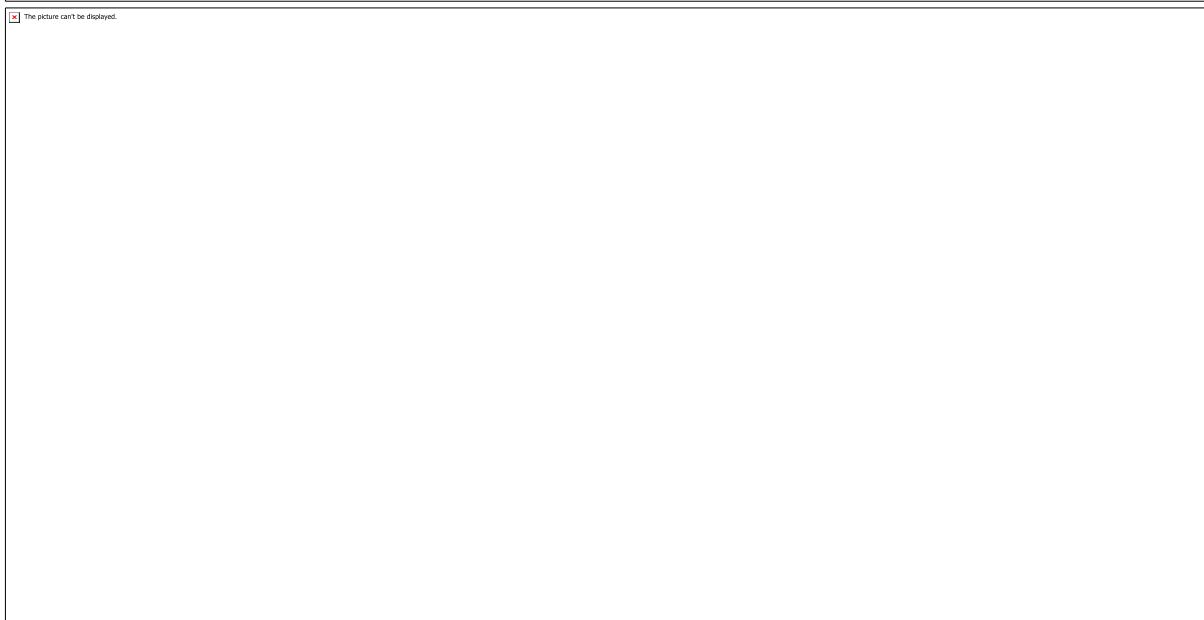
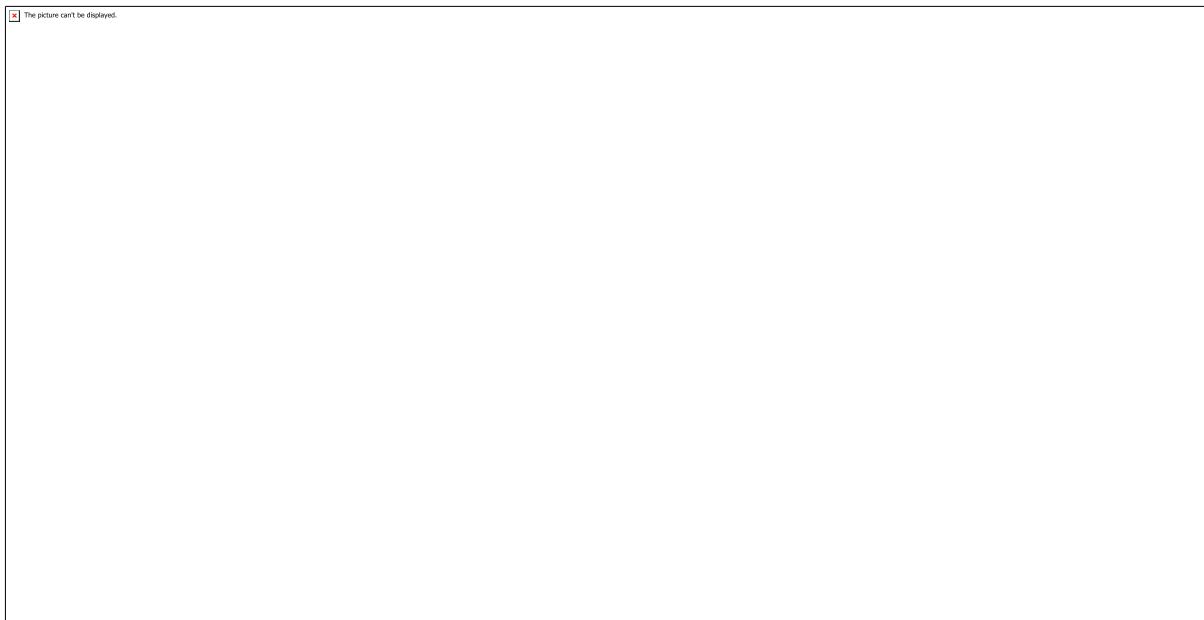
**Now, whenever you create or update a record in the "Department\_c" related to a "College\_c," the "TotalCount\_c" field on the "College\_c" will automatically update to show the total number of related records.**

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









The picture can't be displayed.

MECW

My college colleges CDdepartments student Content

Search... Search

New Contact Edit New Opportunity More

**mecw**

**Details**

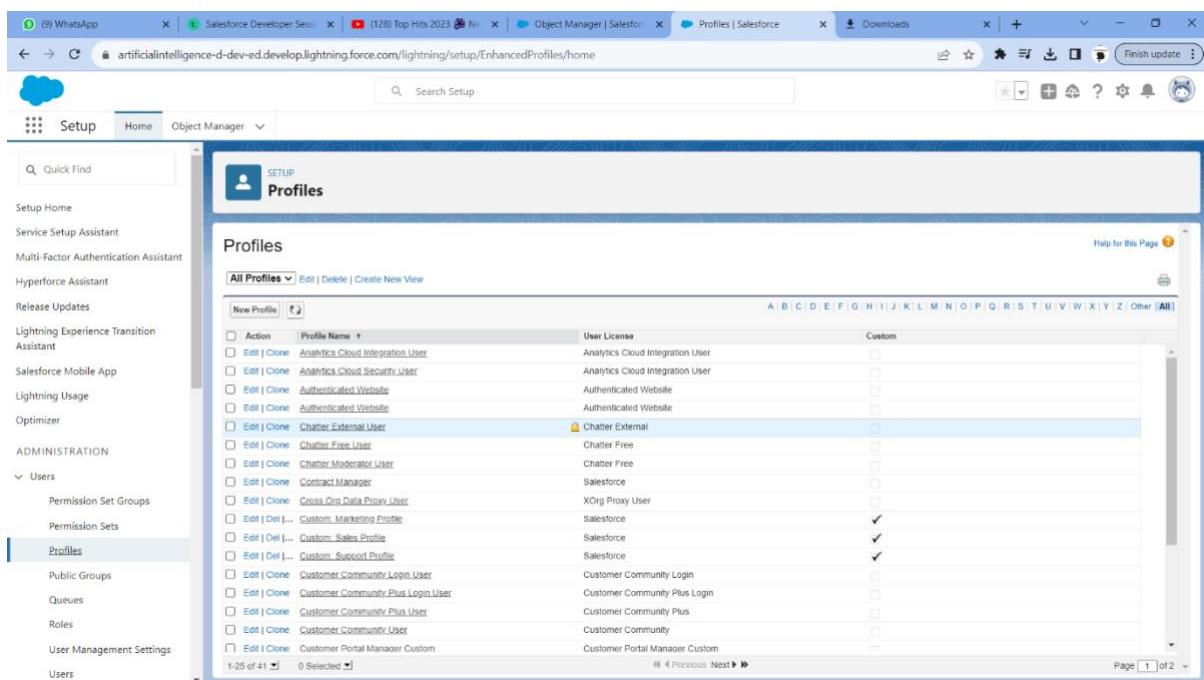
|              |                |                  |                                 |
|--------------|----------------|------------------|---------------------------------|
| college Name | mecw           | Owner            | krishna s                       |
| Total count  | 2              | Last Modified By | krishna s, 01/10/2023, 11:19 am |
| phone        | 9087116402     | Created By       | krishna s, 01/10/2023, 11:16 am |
| Email        | kion@gmail.com |                  |                                 |
| Location     | 90, 80         |                  |                                 |

History

2. If there are 2 users, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main area displays a table of profiles, each with a checkbox, a profile name, a user license, and a status column. The profiles listed include 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authenticator Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', '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', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'Custom' column contains several checked boxes, indicating they are custom profiles.

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home

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 User Management Settings Users

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

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

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

1-7 of 7 | 0 Selected | Page 1 of 1

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fu%2Fprofile%2FProfileClone%2Fe%...| Finish update

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 User Management Settings Users

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. Required Information

Existing Profile: Standard Platform User  
User License: Salesforce Platform  
Profile Name:

Save Cancel

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | Finish update

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 User Management Settings Users

Profiles

### Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

|                   |                        |
|-------------------|------------------------|
| Existing Profile: | Standard Platform User |
| User License:     | Salesforce Platform    |
| Profile Name:     | Manager                |

Save Cancel

Help for this Page

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | Finish update

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 User Management Settings Users

Profiles

### Manager

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

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

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

**Profile Detail**

|               |                              |
|---------------|------------------------------|
| Name:         | Manager                      |
| User License: | Salesforce Platform          |
| Description:  |                              |
| Created By:   | GOPAL S. 01/10/2023, 7:09 pm |
| Modified By:  | GOPAL S. 01/10/2023, 7:09 pm |

**Page Layouts**

| Standard Object Layouts    | Global                            | Operating Hours                  |
|----------------------------|-----------------------------------|----------------------------------|
| Email Application          | Not Assigned                      | Order                            |
| Home Page Layout           | Home Page Default                 | Order Product                    |
| Account                    | Account Layout                    | Payment                          |
| Alternative Payment Method | Alternative Payment Method Layout | Payment Authorization            |
| Appointment Invitation     | Appointment Invitation Layout     | Payment Authorization Adjustment |
| Asset                      | Asset Layout                      | Payment Gateway                  |

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | + | - | Search Setup | Finish update

## Manager

Set the permissions and page layouts for this profile.

**Profile Edit**

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

**Custom App Settings**

|                                       |   |                               |                               |                                  |                               |
|---------------------------------------|---|-------------------------------|-------------------------------|----------------------------------|-------------------------------|
| Analytics Studio (standard__Insights) | Visible <input type="checkbox"/>            | Default <input type="radio"/> | Platform (standard__Platform) | Visible <input type="checkbox"/> | Default <input type="radio"/> |
| App Launcher (standard__AppLauncher)  | Visible <input type="checkbox"/>            | Default <input type="radio"/> | WDC (standard__Work)          | Visible <input type="checkbox"/> | Default <input type="radio"/> |
| Not (not)                             | Visible <input checked="" type="checkbox"/> | Default <input type="radio"/> |                               |                                  |                               |

**Service Provider Access**

Tab Settings

Overwrite users' personal tab customizations

|                       |   |   |
|-----------------------|---|---|
| Standard Tab Settings | Home <input type="radio"/> Default On           | Learning <input type="radio"/> Default On                 |
| Accounts              | Accounts <input type="radio"/> Default On       | Libraries <input type="radio"/> Tab Hidden                |
| Alert Settings        | Alert Settings <input type="radio"/> Default On | Lightning Bolt Solutions <input type="radio"/> Default On |

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | + | - | Search Setup | Finish update

## Manager

Set the permissions and page layouts for this profile.

**Communication Subscription Channel Types**

|                                     |                                     |                                     |                                     |                                     |                          |                          |
|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| Communication Subscription Consents | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Communication Subscription Timings  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contacts                            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contact Point Addresses             | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |
| Contact Point Consents              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contact Point Emails                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Individuals**

|                           |                                     |                                     |                                     |                                     |                                     |                          |
|---------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
| Locations                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |
| Party Consents            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |
| Push Topics               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Sellers                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Streaming Channels        | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| User External Credentials | <input type="checkbox"/>            | <input type="checkbox"/> |

**Custom Object Permissions**

| Basic Access | Data Administration      |                          |                          |                          |                          |                          |
|--------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
|              | Read                     | Create                   | Edit                     | Delete                   | View All                 | Modify All               |
| Bank         | <input type="checkbox"/> |
| customers    | <input type="checkbox"/> |

Enhancement Requests

| Basic Access | Data Administration      |                          |                          |                          |                          |                          |
|--------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
|              | Read                     | Create                   | Edit                     | Delete                   | View All                 | Modify All               |
|              | <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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | Finish update

Setup Home Object Manager

Quick Find

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings Users

SEARCH

Profiles

Contact Point Addresses Contact Point Consents Contact Point Emails Sellers Streaming Channels User External Credentials

Custom Object Permissions

|                      | Basic Access                        | Create                              | Edit                                | Delete                              | Data Administration                 |
|----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Bank                 | <input checked="" type="checkbox"/> |
| customers            | <input checked="" type="checkbox"/> |
| Enhancement Requests | <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                                |

Changelog comment for enhanced

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | Finish update

Setup Home Object Manager

Quick Find

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings Users

SEARCH

Profiles

Custom Object Permissions

|                      | Basic Access             | Create                   | Edit                     | Delete                   | Data Administration      |
|----------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Bank                 | <input type="checkbox"/> |
| customers            | <input type="checkbox"/> |
| Enhancement Requests | <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                                |

Obscure secret answer for password resets  
Require a minimum 1 day password lifetime  
Don't immediately expire links in forgot password emails

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQbz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | Finish update

**Custom Object Permissions**

|              | Bank                                | customers                           | Enhancement Requests                |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |
|--------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
|              | Read                                | Create                              | Edit                                | Delete                              | View All                            | Modify All                          | Read                                | Create                              | Edit                                | Delete                              | View All                            | Modify All                          |
| Basic Access | <input checked="" 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 lifetime
- Don't immediately expire links in forgot password emails

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home | Object Manager | Salesforce | Users | Salesforce | Downloads | + | - | Search Setup | Finish update

**All Users**

This page allows you to create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users | Edit | Create New View

| Action                                  | Full Name        | Alias   | Username  | Role                                | Active                              | Profile                          |
|---|------------------|---------|---|-------------------------------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/>   Edit   Login | Adriana_Diva     | dadan   | test_diva_pas_4w@bytb9wtk.tszgrg9kxpx_3qj8efoyzwms.h43hkze6mea@gmail.com      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | JMS User                         |
| <input type="checkbox"/>   Edit         | Chatter_Expert   | Chatter | chatty_00d500000bc5skkeab.lo0hfwmgnote@chatter.salesforce.com                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Chatter Free User                |
| <input type="checkbox"/>   Edit   Login | Ellington_Amelia | ash     | amelia.ellington.1.46kxcp5000in.d6cyvdcu4wh.hnb0wmwvhho.wquctoridav@gmail.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Standard Platform User           |
| <input type="checkbox"/>   Edit         | S_GOPA           | GS      | kot120@gmail.com  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | System Administrator             |
| <input type="checkbox"/>   Edit         | User_Integration | integ   | integration@00d500000bc5skkeab.com  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/>   Edit         | User_Security    | sec     | insightssecurity@00d500000bc5skkeab.com                                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Analytics Cloud Security User    |

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv... | Users | Salesforce | Downloads

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: [ ] Last Name: [ ] Role: <None Specified>

Aliases: [ ] User License: [ ] Salesforce Integration

Email: [ ] Profile: [ ] Salesforce API Only System Integrations

Username: [ ] Active:

Nickname: [ ] Marketing User:

Title: [ ] Offline User:

Company: [ ] Knowledge User:

Department: [ ] Flow User:

Division: [ ] Service Cloud User:

Data.com User Type: [ ] Site.com Contributor User:

Data.com Monthly Addition Limit: Default Limit (300) Site.com Publisher User:

Accessibility Mode (Classic Only):  High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:  Debug Mode:

Help for this Page

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv... | Users | Salesforce | Downloads

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmiya Last Name: bela Role: <None Specified>

Aliases: sbae User License: [ ] Salesforce Platform

Email: 2k20cse179@kiot.ac.in Profile: [ ] Manager

Username: 2k21it@kiot.ac.in Active:

Nickname: User169616771282564526 Marketing User:

Title: worker Offline User:

Company: kiot bank Knowledge User:

Department:  Flow User:

Division:  Service Cloud User:

Data.com User Type: [ ] Site.com Contributor User:

Data.com Monthly Addition Limit: Default Limit (300) Site.com Publisher User:

Accessibility Mode (Classic Only):  High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:  Debug Mode:

Help for this Page

Screenshot of a web browser showing the Salesforce Setup interface and a Gmail inbox.

The top window is the Salesforce Setup interface, specifically the "Users" page. The user details for "Sowmya bala" are displayed, including her name, email (2k21it@kiot.ac.in), and various profile settings like Marketing User, Active, and Manager. The sidebar shows navigation links for Setup, Home, Object Manager, and various administrative modules.

The bottom window is a Gmail inbox. A new email from support@salesforce.com is visible, with the subject "Welcome to Salesforce!". The email body contains a "Verify Account" button, a URL (<https://artificialintelligence-d-dev-ed-develop.my.salesforce.com>), and a welcome message. The Gmail interface includes a sidebar with Mail, Chat, Spaces, Meet, and Drafts sections.

Salesforce Change Your Password

Enter a new password for 2k21it@kiot.ac.in. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

\* New Password: ..... Good

\* Confirm New Password: ..... Match

Security Question: In what city were you born?

\* Answer: salem

Change Password

Password was last changed on 01/10/2023, 7:13 pm.

Login | Salesforce

Username: 2k21it@kiot.ac.in

Password: .....

Log In

Remember me

Forgot Your Password?

Join us for the future of trusted enterprise AI, streaming on Salesforce+.

WATCH ON DEMAND

AIDay

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Recently Viewed | Bank | Salesfo... +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank\_\_c/list?filterName=Recent

MECW

mecw Bank customers Home

Bank Recently Viewed

0 items • Sorted by Bank Name • Updated a few seconds ago

Bank Name ↓

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

Search...

sowmiya bala artificialintelligence-d-dev-ed.develop.my.salesforce.com

Incognito Finish update

Display Density

Comfy (selected)

Compact

Options

Switch to Salesforce Classic

Add Username

New Bank | Salesforce +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank\_\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigation.location=LIST\_VIEW&uid=16...

Incognito Finish update

mecw Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name ↓

New Bank

\* = Required Information

Information

Bank Name: boi

Owner: sowmiya bala

Phone No.: 0897754534

Cancel Save & New Save

The screenshot displays two screenshots of the Salesforce Lightning Experience interface.

**Top Screenshot:** A 'New customer' modal window is open. The 'Information' section contains two required fields: 'customer Name' (set to 'madhu') and 'Bank' (set to 'boi'). Below the form are 'Cancel', 'Save & New', and 'Save' buttons. A note at the top right indicates that an asterisk (\*) denotes required information.

**Bottom Screenshot:** The customer record has been successfully created. A green banner at the top states 'customer "madhu" was created.' The record details page shows the following information:

- Related** tab is selected.
- Details** tab is visible.
- customer Name:** madhu
- Bank:** boi
- Created By:** sowmiya bala, 01/10/2023, 7:17 pm
- Last Modified By:** sowmiya bala, 01/10/2023, 7:17 pm

At the top of the page, the URL is [https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer\\_\\_c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\\_VIEW&ui...](https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer__c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&ui...)

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is titled "Setup" and includes sections for Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Update, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage Optimizer, and ADMINISTRATION. Under ADMINISTRATION, the "Users" section is expanded, showing sub-options: Permission Set Groups, Permission Sets, Profiles (which is currently selected), Public Groups, Queues, Roles, and User Management Settings. The main content area is titled "Profiles" and displays a table of existing profiles. The table columns are: Action, Profile Name, User License, and Custom. The profiles listed are:

| Action                        | Profile Name                            | User License           | Custom                              |
|-------------------------------|---|------------------------|-------------------------------------|
| <a href="#">Edit   Clone</a>  | salesforce API Only System Integrations | Salesforce Integration | <input type="checkbox"/>            |
| <a href="#">Edit   Delete</a> | salesman@999                            | Salesforce             | <input checked="" type="checkbox"/> |
| <a href="#">Edit   Clone</a>  | Silver Partner User                     | Silver Partner         | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>  | Solution Manager                        | Salesforce             | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>  | Standard Platform User                  | Salesforce Platform    | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>  | Standard User                           | Salesforce             | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>  | System Administrator                    | Salesforce             | <input type="checkbox"/>            |

At the bottom of the page, there are navigation links for "1 of 7" and "0 Selected", and a footer bar with links to "4 Previous", "Next > 10", and "Page 1 of 1".

The screenshot shows the Salesforce Setup Home page. The left sidebar is titled "Setup" and includes sections for "Quick Find", "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Hyperforce Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", and "Optimizer". Under "ADMINISTRATION", there are sections for "Users" (with sub-options: "Permission Set Groups", "Permission Sets", "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings", and "Users"), "Groups", "Email", "File", "Help", and "Feedback". The main content area is titled "SETUP Profiles" and shows a "Clone Profile" dialog. The dialog has a message "Enter the name of the new profile." and a note "You must select an existing profile to clone from." It includes fields for "Existing Profile", "Standard Platform User", "User License", "Salesforce Platform", and "Profile Name" (which is set to "Salesmanager"). At the bottom are "Save" and "Cancel" buttons.

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

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 User Management Settings Users

Profiles

Profile salesmanage

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 Range (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Page Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

**Profile Detail**

| Name | salesmanage | User License | Salesforce Platform | Description | Created By                  | Modified By                 |
|------|-------------|--------------|---------------------|-------------|-----------------------------|-----------------------------|
|      |             |              |                     |             | GQPAL_S_01/10/2023, 7:19 pm | GQPAL_S_01/10/2023, 7:19 pm |

**Page Layouts**

| Standard Object Layouts    | Global   | Operating Hours  |
|----------------------------|--|--|
| Email Application          | Global Layout<br>[View Assignment]                     | Operating Hours Layout<br>[View Assignment]                  |
| Home Page Layout           | Not Assigned<br>[View Assignment]                      | Order Layout<br>[View Assignment]                            |
| Account                    | Home Page Default<br>[View Assignment]                 | Order Product Layout<br>[View Assignment]                    |
| Alternative Payment Method | Account Layout<br>[View Assignment]                    | Payment Layout<br>[View Assignment]                          |
| Appointment Invitation     | Alternative Payment Method Layout<br>[View Assignment] | Payment Authorization Adjustment Layout<br>[View Assignment] |
| Asset                      | Appointment Invitation Layout<br>[View Assignment]     | Payment Authorization Adjustment Layout<br>[View Assignment] |
|                            | Asset Layout<br>[View Assignment]                      | Payment Gateway Layout<br>[View Assignment]                  |

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

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 User Management Settings Users

Profiles

Profile Edit salesmanage

Set the permissions and page layouts for this profile.

**Profile Edit**

| Name | salesmanage | User License | Salesforce Platform | Description | Custom Profile |
|------|-------------|--------------|---------------------|-------------|----------------|
|      |             |              |                     |             | ✓              |

**Custom App Settings**

| Visible                             | Default                          | Visible                  | Default                          |
|-------------------------------------|----------------------------------|--------------------------|----------------------------------|
| <input type="checkbox"/>            | <input checked="" type="radio"/> | <input type="checkbox"/> | <input checked="" type="radio"/> |
| <input type="checkbox"/>            | <input checked="" type="radio"/> | <input type="checkbox"/> | <input checked="" type="radio"/> |
| <input checked="" type="checkbox"/> | <input checked="" type="radio"/> | <input type="checkbox"/> | <input checked="" type="radio"/> |

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

**Standard Tab Settings**

| Home     | Default On                       |
|----------|----------------------------------|
| Learning | <input checked="" type="radio"/> |
| Threads  | <input type="radio"/>            |

Salesforce Developer Session 2

Profiles | Salesforce

Welcome to Salesforce: Verify

Finish update

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

User Management Settings

Users

Custom Object Permissions

|                      | Basic Access                        | Create                              | Edit                                | Delete                              | View All                            | Modify All                          |  | Basic Access | Create | Edit | Delete | View All | Modify All |
|----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--|--------------|--------|------|--------|----------|------------|
| Contact Point Emails | <input checked="" type="checkbox"/> |  |              |        |      |        |          |            |
| Bank                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |  |              |        |      |        |          |            |
| customers            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |  |              |        |      |        |          |            |
| Enhancement Requests |                                     |                                     |                                     |                                     |                                     |                                     |  |              |        |      |        |          |            |

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obfuscate secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Salesforce Developer Session 2

Profiles | Salesforce

Welcome to Salesforce: Verify

Finish update

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

User Management Settings

Users

Custom Object Permissions

|                      | Basic Access                        | Create                              | Edit                                | Delete                              | View All                            | Modify All                          |  | Basic Access | Create | Edit | Delete | View All | Modify All |
|----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--|--------------|--------|------|--------|----------|------------|
| Contact Point Emails | <input checked="" type="checkbox"/> |  |              |        |      |        |          |            |
| Bank                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |  |              |        |      |        |          |            |
| customers            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |  |              |        |      |        |          |            |
| Enhancement Requests |                                     |                                     |                                     |                                     |                                     |                                     |  |              |        |      |        |          |            |

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

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Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obfuscate secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save

Save & New

Cancel

Salesforce Developer Session 2

Users | Salesforce

Welcome to Salesforce: Verify your...

Finish update

Setup Home Object Manager

Search Setup

User

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App Menu

New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role <None Specified>

User License Salesforce Integration

Profile Salesforce API Only System Integrations

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type -None-

Data.com Monthly Addition Limit Default Limit (300)

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Salesforce Developer Session 2

Users | Salesforce

Welcome to Salesforce: Verify your...

Finish update

Setup Home Object Manager

Search Setup

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App Menu

New User

User Edit Save Save & New Cancel

General Information

First Name madhu

Last Name b

Alias mb

Email 2k20cse179@kiot.ac.in

Username 2k20cse179@kiot.ac.in

Nickname User169616842428654192

Title worker

Company kiot bank

Department Sales

Division

Role <None Specified>

User License Salesforce Platform

Profile salesmanager

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type -None-

Data.com Monthly Addition Limit Default Limit (300)

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify... | + | Finish update

The screenshot shows the Salesforce Setup interface with the 'User Management Settings' section selected under 'User'. The main content area displays the 'Users' configuration page. It includes fields for 'Mailing Address' (Street, City, Zip/Postal Code, State/Province, Country), 'Single Sign On Information' (Federation ID), 'Locale Settings' (Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata), Locale: English (India), Language: English), and 'Approver Settings' (Delegated Approver, Manager, Receive Approval Request Emails: Only if I am an approver, Generate new password and notify user immediately). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify... | + | Finish update

This screenshot is identical to the one above, showing the 'Users' configuration page in the Salesforce Setup interface. The 'User Management Settings' section is selected, and the 'Users' configuration page is displayed with the same fields and settings as the first screenshot.

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po | Users | Salesforce | Welcome to Salesforce: Verify your account | + | Finish update

User Detail

| Name  | madhu b  | Role                                 | Marketing User                           |
|---|--|--------------------------------------|--|
| Alias   | mb   | User License                         | Active                                   |
| Email   | 2k20csit179@kiot.ac.in [Verify]  | Profile                              | salesmanag                               |
| Username  | 2k20csit@kiot.ac.in  | Offline User                         | <input type="checkbox"/>                 |
| Nickname  | User16961604242805419206   | Knowledge User                       | <input type="checkbox"/>                 |
| Title   | worker   | Flow User                            | <input type="checkbox"/>                 |
| Company   | kiot bank  | Service Cloud User                   | <input type="checkbox"/>                 |
| Department  | Sales  | Site.com Contributor User            | <input type="checkbox"/>                 |
| Division  |  | Site.com Publisher User              | <input type="checkbox"/>                 |
| Address   | 41/14, aruppampalayam, umamasolapuram .., ParaiKKadu , salem- 603608 SALEM 633608 TAMIL NADU | WDC User                             | <input type="checkbox"/>                 |
| Time Zone   | (GMT+05:30) India Standard Time (Asia/Kolkata)   | Mobile Push Registrations            | <input checked="" type="checkbox"/> View |
| Locale  | English (India)  | Data.com User Type                   | <input type="checkbox"/>                 |
| Language  | English  | Accessibility Mode (Classic Only)    | <input type="checkbox"/>                 |
| Delegated Approver                                | Manager  | Debug Mode                           | <input type="checkbox"/>                 |
| Receive Approval Request Emails                   | Only if I am an approver   | High-Contrast Palette on Charts      | <input checked="" type="checkbox"/>      |
| Federation ID                                     |  | Load Lightning Pages While Scrolling | <input checked="" type="checkbox"/>      |
| App Registration: One-Time Password Authenticator |  | Customize CRM Contact Hours          |  |

Gmail | Search in mail | Active | 1 of 6,486

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:  
<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>

Username:  
2k20csit@kiot.ac.in

Again, welcome to Salesforce!

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 Salesforce.com, Inc. The Landmark at One Market, Suite 300, San Francisco, CA, 94105, United States

Reply | Forward

Change Your Password | Salesforce

artificialintelligence-d-dev-ed.develop.my.salesforce.com/\_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupId=ChangePa... Incognito (3) Finish update



## Change Your Password

Enter a new password for 2k20csit@kiot.ac.in. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
In what city were you born?

\* Answer  
india

Change Password

Password was last changed on 01/10/2023, 7:24 pm.

Recently Viewed | Bank | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank\_\_c/list?filterName=Recent Incognito (3) Finish update

MECW

mecw Bank customers Home

Bank

Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

List View

Recently Viewed | customers | [S](#) +

[artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer\\_c/list?filterName=Recent](#)

MECW

mebw Bank customers Home

Search...

customers Recently Viewed [+](#)

0 items • Updated a few seconds ago

customer Name

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

List View

(9) WhatsApp | Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce! | Reset Password | Salesforce | Incognito (3) | Finish update

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

Setup Home Object Manager

Search Setup

Permission Sets

Help for this Page

Permission Sets

This page allows you to create, view, and manage permission sets.

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

All Permission Sets [Edit](#) | [Delete](#) | [Create New View](#)

| 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"/> | Commerce Admin                      | Allow access to commerce admin features.                                  | Commerce Admin Permission Set License Seat             |
| <input type="checkbox"/> | Contact Center Admin                | Manage Service Cloud Voice contact centers that use Amazon Conn...        | Service Cloud Voice User                               |
| <input type="checkbox"/> | Contact Center Agent                | Access agent features in Service Cloud Voice contact centers tha...       | Service Cloud Voice User                               |
| <input type="checkbox"/> | Contact Center Supervisor           | Access supervisor features in Service Cloud Voice contact centers th...   | Service Cloud Voice User                               |
| <input type="checkbox"/> | Experience Profile Manager          | Lets users create, read, edit, and delete locations, sublocations, que... | Salesforce   |
| <input type="checkbox"/> | Facility Manager                    | Give your mobile workforce access to the Field Service mobile app. ...    | Field Service Mobile                                   |
| <input type="checkbox"/> | FieldServiceMobileStandardPermSet   | Allow access to commerce merchandising features.                          | Commerce Merchandiser User Permission Set License Seat |
| <input type="checkbox"/> | Merchandiser                        | Read Access to all entities enabled by Order Management                   | Lightning Order Management User                        |
| <input type="checkbox"/> | Order Management Agent              | Access to all features enabled by Order Management                        | Lightning Order Management User                        |
| <input type="checkbox"/> | Order Management Operations Manager | Limited access to Order Management features for Self Service              | Lightning Order Management User                        |
| <input type="checkbox"/> | Order Management Shopper            |   |  |

1-25 of 29 [Selected](#) [4 Previous](#) [Next 10](#) Page 1 of 2

<https://artificialintelligence-d-dev-ed.develop.lightning.force.com/one/one.app#/setup/PermSets/home>

## 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:

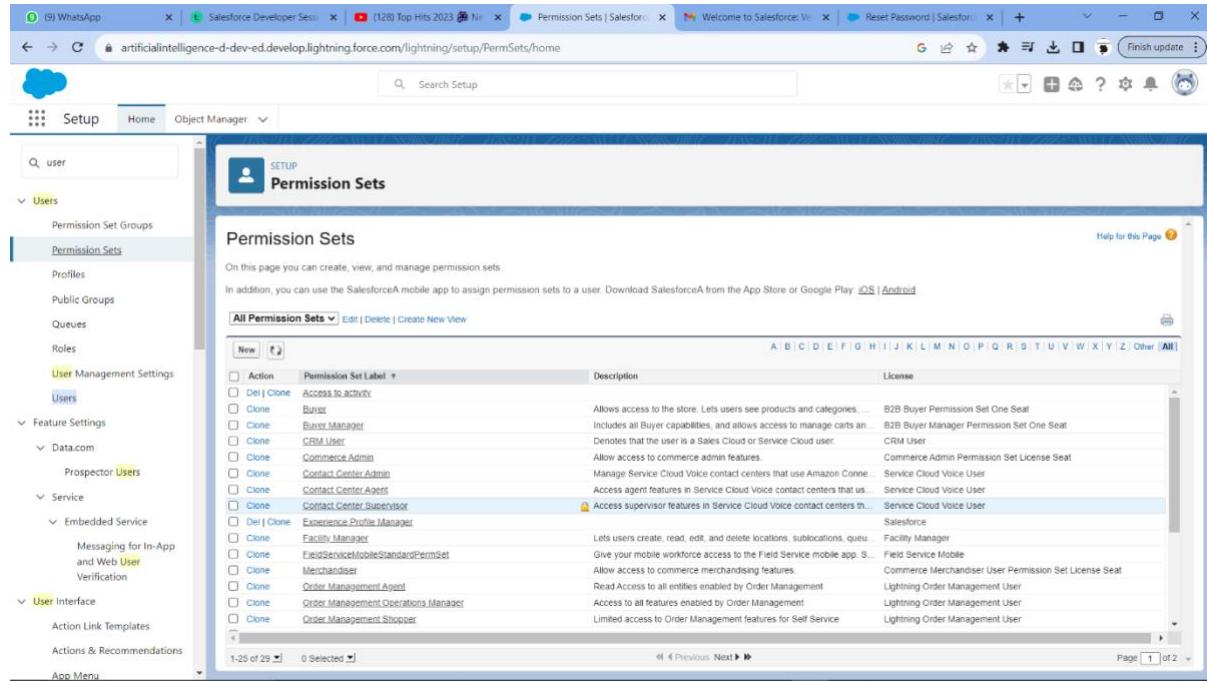
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## 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 'Permission Sets' page. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and sections for 'Users', 'User Management Settings', 'Feature Settings', 'Data.com', 'Service', 'Embedded Service', and 'User Interface'. Under 'Users', 'Prospector' and 'Users' are selected. The main content area is titled 'Permission Sets' and displays a table of existing 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\_Agent', 'Contact\_Center\_Supervisor', 'Experience\_Profile\_Manager', 'Facility\_Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order\_Management\_Agent', 'Order\_Management\_Operations\_Manager', and 'Order\_Management\_Shipper'. Each row includes a checkbox for 'Action' and a 'Clone' button. The 'Description' column provides a brief overview of the permissions granted, and the 'License' column indicates the specific license required for each set. The bottom of the page shows pagination controls for '1-25 of 29' and '0 Selected'.

| 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 Conn...         | Service_Cloud_Voice_User                               |
| <input type="checkbox"/> | Contact_Center_Agent                | Access agent features in Service Cloud Voice contact centers that us...    | Service_Cloud_Voice_User                               |
| <input type="checkbox"/> | Contact_Center_Supervisor           | Access supervisor features in Service Cloud Voice contact centers th...    | Salesforce   |
| <input type="checkbox"/> | Experience_Profile_Manager          | Lets users create, read, edit, and delete locations, sublocations, queu... | Facility_Manager                                       |
| <input type="checkbox"/> | Facility_Manager                    | Give your mobile workforce access to the Field Service mobile app. ...     | Field_Service_Mobile                                   |
| <input type="checkbox"/> | FieldServiceMobileStandardPermSet   | Allow access to commerce merchandising features.                           | Commerce_Merchandiser_User_Permission_Set_License_Seat |
| <input type="checkbox"/> | Merchandiser                        | Read Access to all entities enabled by Order Management.                   | Lightning_Order_Management_User                        |
| <input type="checkbox"/> | Order_Management_Agent              | Access to all features enabled by Order Management.                        | Lightning_Order_Management_User                        |
| <input type="checkbox"/> | Order_Management_Operations_Manager | Limited access to Order Management features for Self Service.              | Lightning_Order_Management_User                        |
| <input type="checkbox"/> | Order_Management_Shipper            |  |  |

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

Setup Home Object Manager

Q Search Setup

Users

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Permission Sets

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Users

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App Menu

SETUP

Permission Sets

Create

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

- Choose -None- if you plan to assign this permission set to multiple users with different user and permission set licenses.
- 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

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

Setup Home Object Manager

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App Menu

SETUP

Permission Sets

Create

Enter permission set information

Label:  salesmanager

API Name:  salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

Not sure what a permission set license is? [Learn more here.](#)

License:  -None-

Save Cancel

Help for this Page

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

**Permission Set Overview:**

| Setting                     | Description  | Value |
|-----------------------------|--------------|-------|
| API Name                    | salesmanager |       |
| Namespace Prefix            | GOPALS       |       |
| Created By                  | GOPALS       |       |
| Last Modified By            | GOPALS       |       |
| Session Activation Required | unchecked    |       |

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

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

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

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

**Apex Class Access:** Permissions to execute Apex classes.

**Visualforce Page Access:** Permissions to execute Visualforce pages.

**External Data Source Access:** Permissions to authenticate against external data sources.

**Flow Access:** Permissions to execute Flows.

**Object Settings (Detailed View):**

| Object Name                    | Object Permissions | Total Fields | Tab Settings |
|--------------------------------|--------------------|--------------|--------------|
| ACCOUNTS                       | No Access          | 40           | --           |
| AI Insights 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 Assessments  | No Access          | --           | --           |
| Appointment Categories         | No Access          | 3            | --           |
| Appointment Invitations        | No Access          | 17           | --           |
| Appointment Invites            | --                 | 4            | --           |
| Appointment Schedule Aggregate | 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
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector **Users**
- Service
- Embedded Service
- Messaging for In-App and Web User Verification
- User Interface
- Action Link Templates
- Actions & Recommendations

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Object Permissions' section shows the following settings:

| 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"/> |

The 'Field Permissions' section shows the following settings:

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

Screenshot of the Salesforce Setup interface showing the Permission Sets page for the 'salesmanager' permission set after changes have been made.

The left sidebar shows the same navigation menu under 'Users'.

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Object Permissions' section now shows different settings:

| 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"/>            |

The 'Field Permissions' section remains the same as in the previous screenshot.

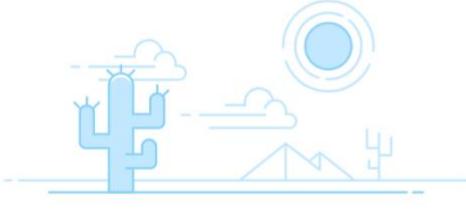
Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: V | Reset Password | Salesforce | + | - | Search Setup | Setup | Home | Object Manager | ... | Finish update

... > SETUP > PERMISSION SET 'SALESMANAGER'

**salesmanager**

**Current Assignments**

No assignments defined.



Add Assignment

Search Setup

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App Menu

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: V | Reset Password | Salesforce | + | - | Search Setup | Setup | Home | Object Manager | ... | Finish update

... > SETUP > PERMISSION SET 'SALESMANAGER' / ASSIGNMENT

**SELECT USERS TO ASSIGN**

**All Users**

1 item selected

| Full Name ↑      | All... ↓ | Username  | Role                              | Profile |
|------------------|----------|---|-----------------------------------|---------|
| Amelia Ellington | aelli    | amelia.ellington.146kxcp9oodlh.d6cwpdcuo4wh.hnbdwvwvhq.wguctpr1dalv@gmail.com | Force.com - App Subscription User |         |
| Chatter Expert   | Chatty   | chatty.00d5j00000bcskkkeab.lo0bfhwmpqjke@chatter.salesforce.com               | Chatter Free User                 |         |
| Diya Adanna      | dadan    | test_diya_pas.4w8bjybi9wik.tszgrgsbkxpx.3gi0fovzwrs.h43bkzw6mea@gmail.com     | UMS User                          |         |
| GOPAL S          | GS       | kiot520@gmail.com   | System Administrator              |         |
| Integration User | integ    | integration@00d5j00000bcskkkeab.com   | Analytics Cloud Integration User  |         |
| madhu b          | mb       | 2k20csit@kiot.ac.in   | salesmanager                      |         |
| Security User    | sec      | insightssecurity@00d5j00000bcskkkeab.com                                      | Analytics Cloud Security User     |         |
| sowmya bala      | sbala    | 2k21it@kiot.ac.in   | Manager                           |         |

Cancel Next

Search this list...

Setup Home Object Manager

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App Menu

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

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date (radio button selected)

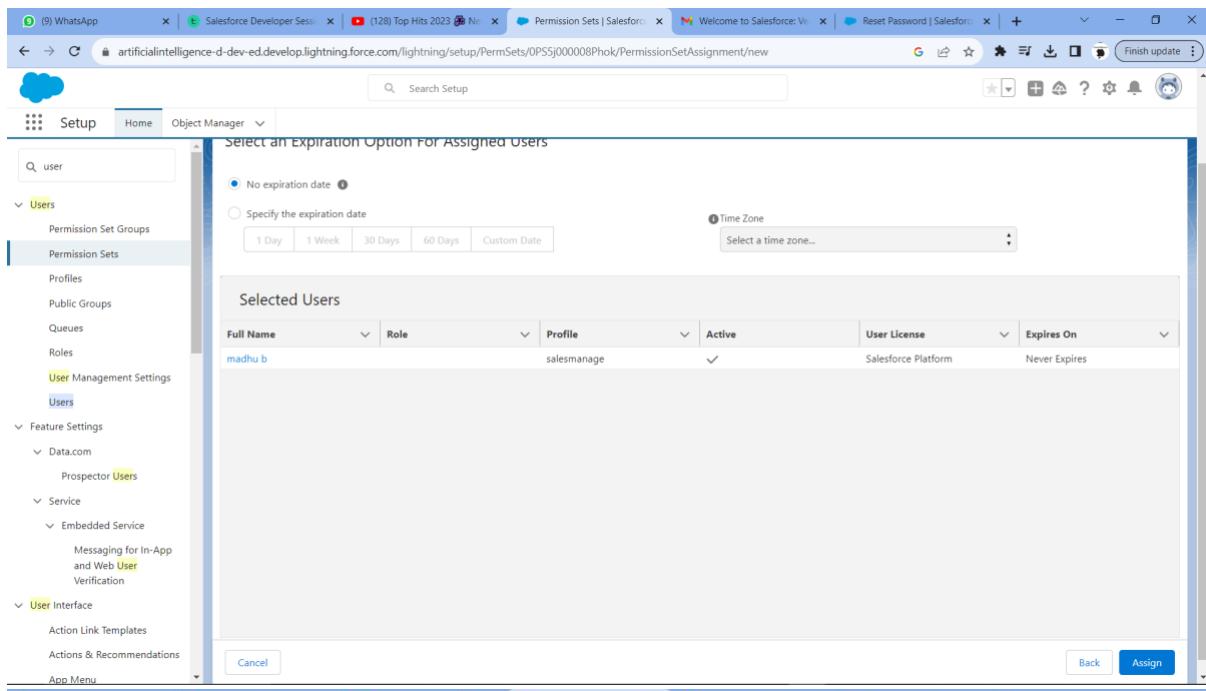
Specify the expiration date (radio button)

Time Zone: Select a time zone...

Selected Users:

| Full Name | Role | Profile      | Active | User License        | Expires On    |
|-----------|------|--------------|--------|---------------------|---------------|
| madhu b   |      | salesmanager |        | Salesforce Platform | Never Expires |

Cancel Back Assign



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

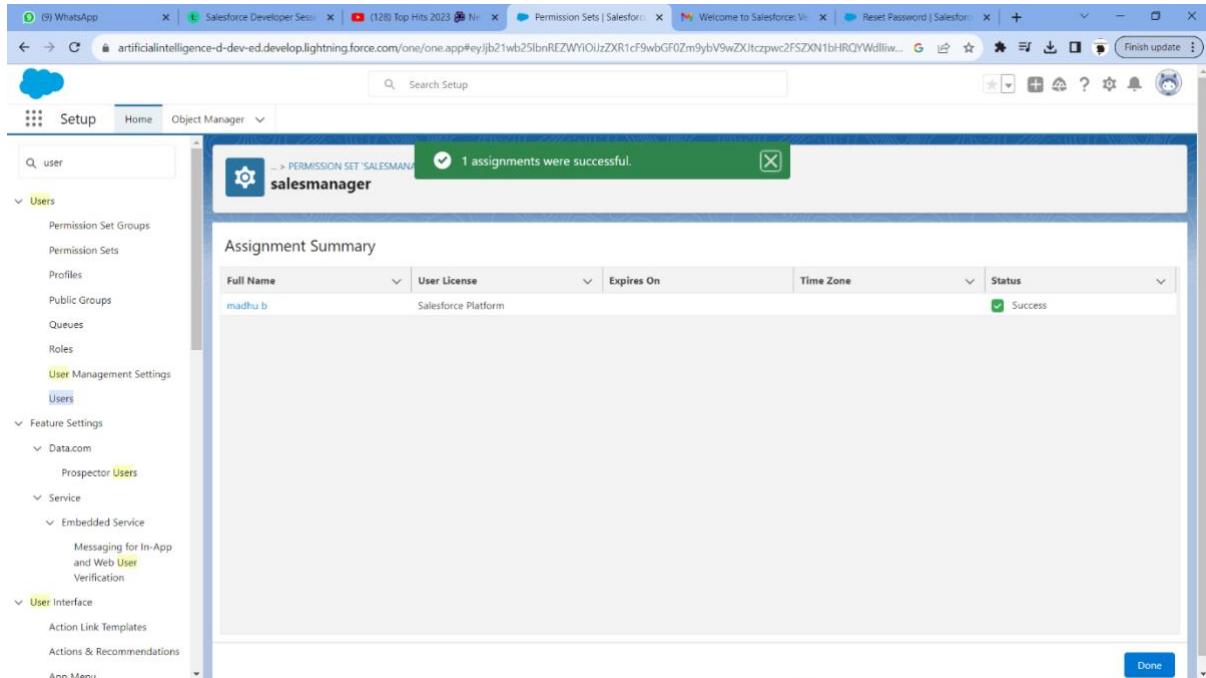
Setup Home Object Manager

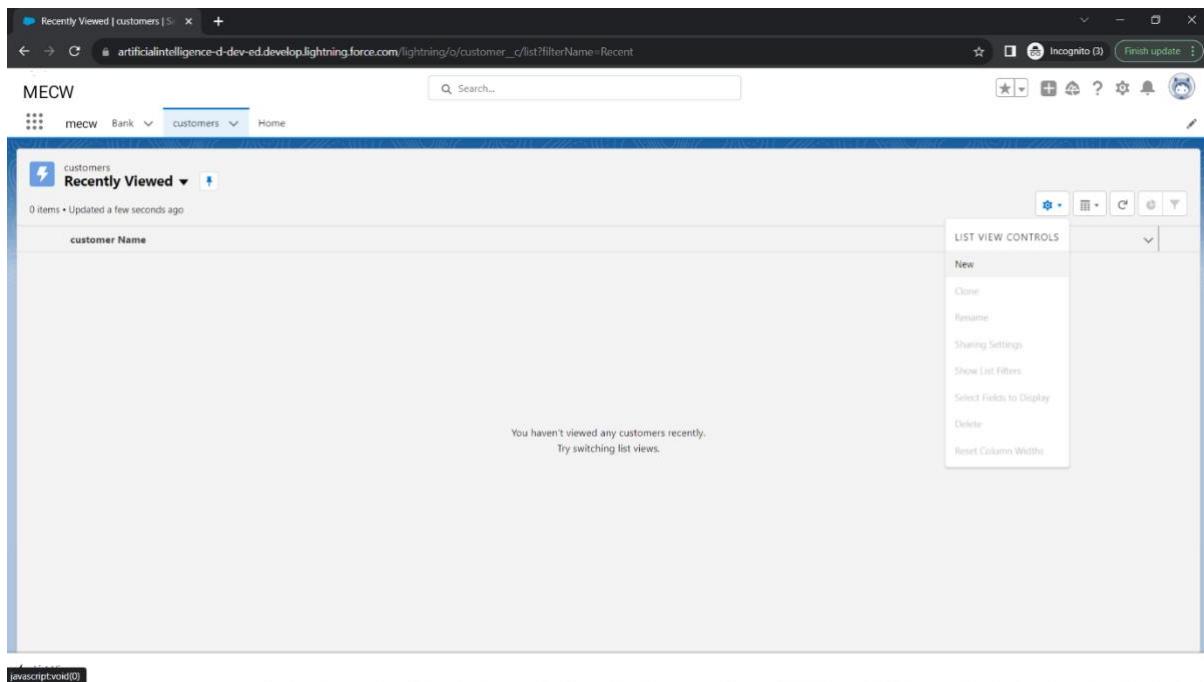
PERMISSION SET 'SALESMANAGER' 1 assignments were successful.

Assignment Summary

| Full Name | User License        | Expires On | Time Zone | Status  |
|-----------|---------------------|------------|-----------|---------|
| madhu b   | Salesforce Platform |            |           | Success |

Done



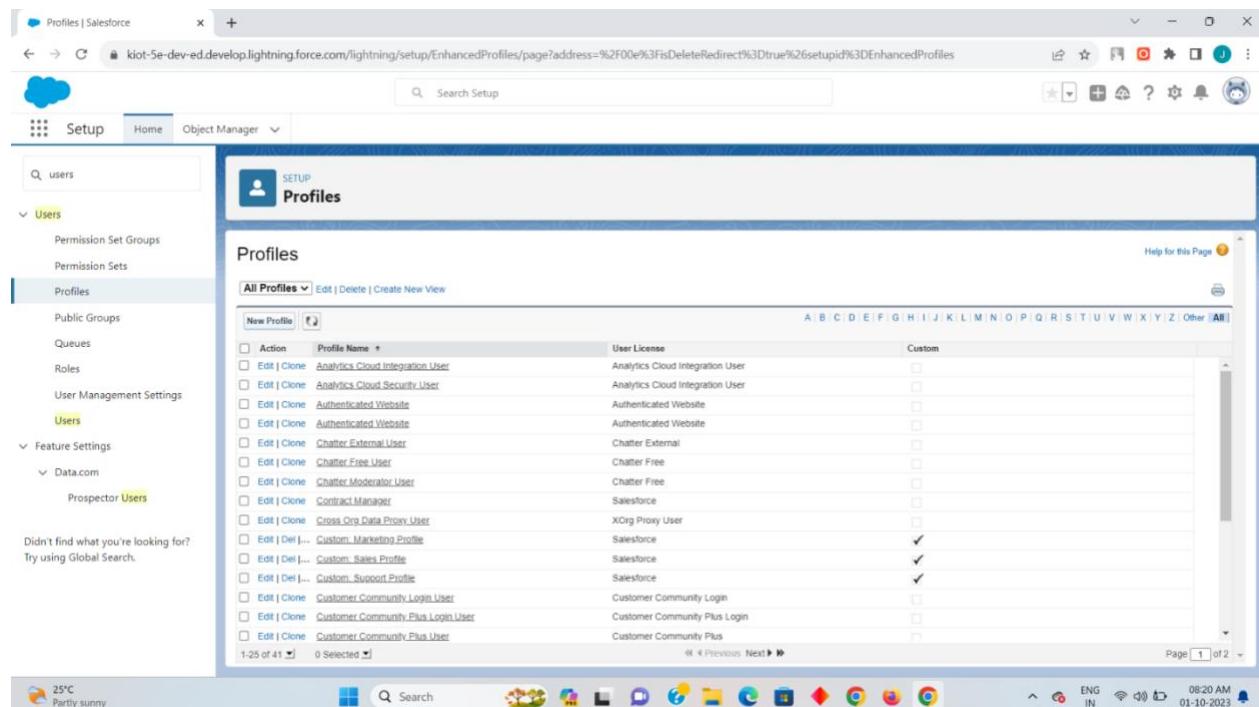


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

## Solution:

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

## Setup-quick search[profile]

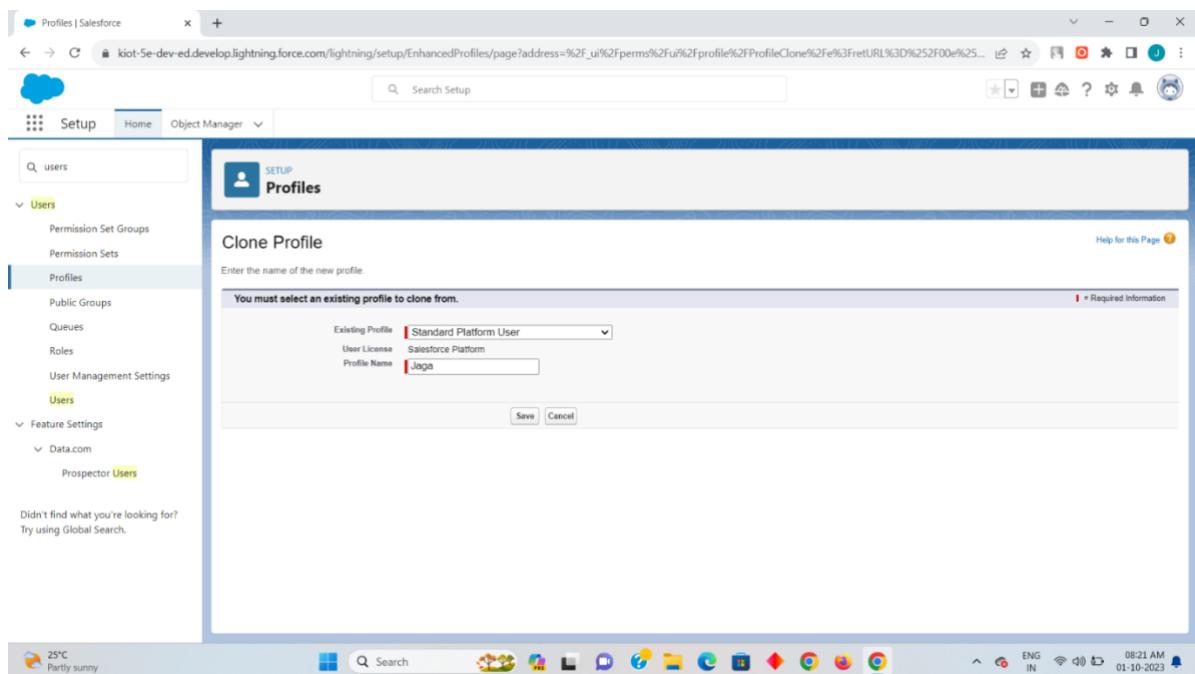


The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager. Under "Users", "Profiles" is selected. Other sections include "Permission Set Groups", "Permission Sets", "Public Groups", "Queues", "Roles", "User Management Settings", "Users", "Feature Settings", "Data.com", and "Prospector". A note at the bottom says "Did you find what you're looking for? Try using Global Search."
- Current Page:** Profiles
- Table Headers:** All Profiles, Edit | Delete | Create New View, New Profile, Action, Profile Name, User License, Custom.
- Table Data:** A list of profiles with their names and user licenses. Some profiles have checkboxes next to them, and some have checkmarks in the "Custom" column.
- Page Footer:** Page 1 of 2, with navigation arrows and a search bar.
- System Status:** 25°C Partly sunny, ENG IN, 08:20 AM, 01-10-2023.

## Step 2:

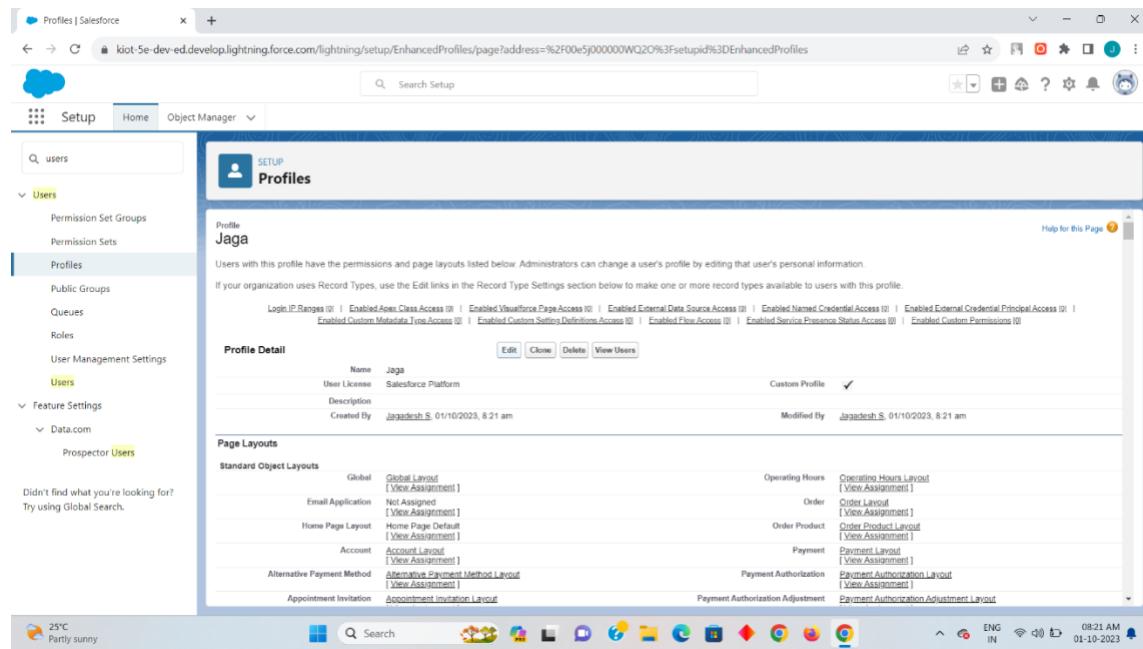
Click on the new to create a new profile along with the label and Api



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

## Step 3:

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



Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3FreURL%3D%252F00e5j00000WQ2O%253fsetupid...

Setup Home Object Manager

Search Setup

Users

- Permission Set Groups
- Permission Sets
- Profiles**
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users

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

SETUP Profiles

Communication Subscriptions, Contact Types, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, User External Credentials

Communication Subscription Consents, Communication Subscription Timings, Contacts, Contact Point Addresses, Contact Point Consents, Contact Point Emails

Basic Access Read Create Edit Delete View All Modify All

Basic Access Read Create Edit Delete View All Modify All

Providers Resources

Session Settings Session Times Out After 2 hours of inactivity Session Security Level Required at Login None

Enable different Experience Cloud login policies for employees Separate Experience Cloud site and Salesforce login authentication for employees Relax login IP restrictions Skip employee device activation during Experience Cloud site login

25°C Partly sunny

ENG IN 08:21 AM 01-10-2023

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar shows navigation options like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', etc. The main content area shows a grid of checkboxes for various permissions across different categories. Below this is a 'Custom Object Permissions' section with two tables for 'Providers' and 'Resources'. At the bottom are 'Session Settings' and 'Session Security Level Required at Login' sections.

Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3FreURL%3D%252F00e5j00000WQ2O%253fsetupid...

Setup Home Object Manager

Search Setup

Users

- Permission Set Groups
- Permission Sets
- Profiles**
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users

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

SETUP Profiles

Communication Subscriptions, Contact Types, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, User External Credentials

Communication Subscription Consents, Communication Subscription Timings, Contacts, Contact Point Addresses, Contact Point Consents, Contact Point Emails

Basic Access Read Create Edit Delete View All Modify All

Basic Access Read Create Edit Delete View All Modify All

Providers Resources

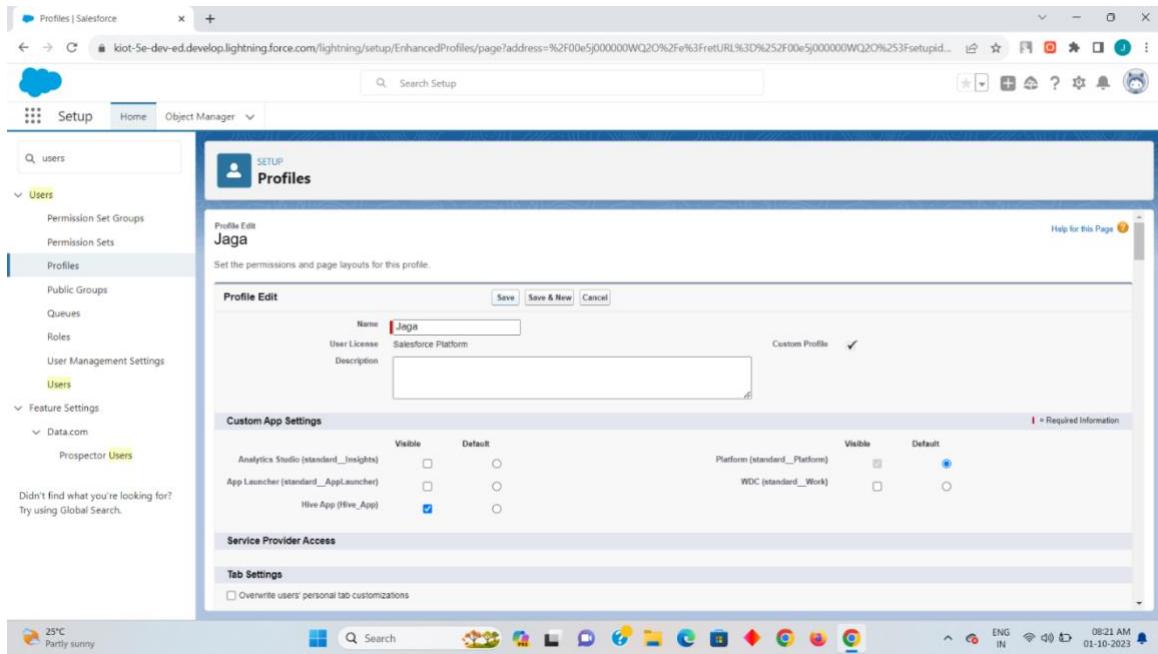
Session Settings Session Times Out After 2 hours of inactivity Session Security Level Required at Login None

Enable different Experience Cloud login policies for employees Separate Experience Cloud site and Salesforce login authentication for employees Relax login IP restrictions Skip employee device activation during Experience Cloud site login

25°C Partly sunny

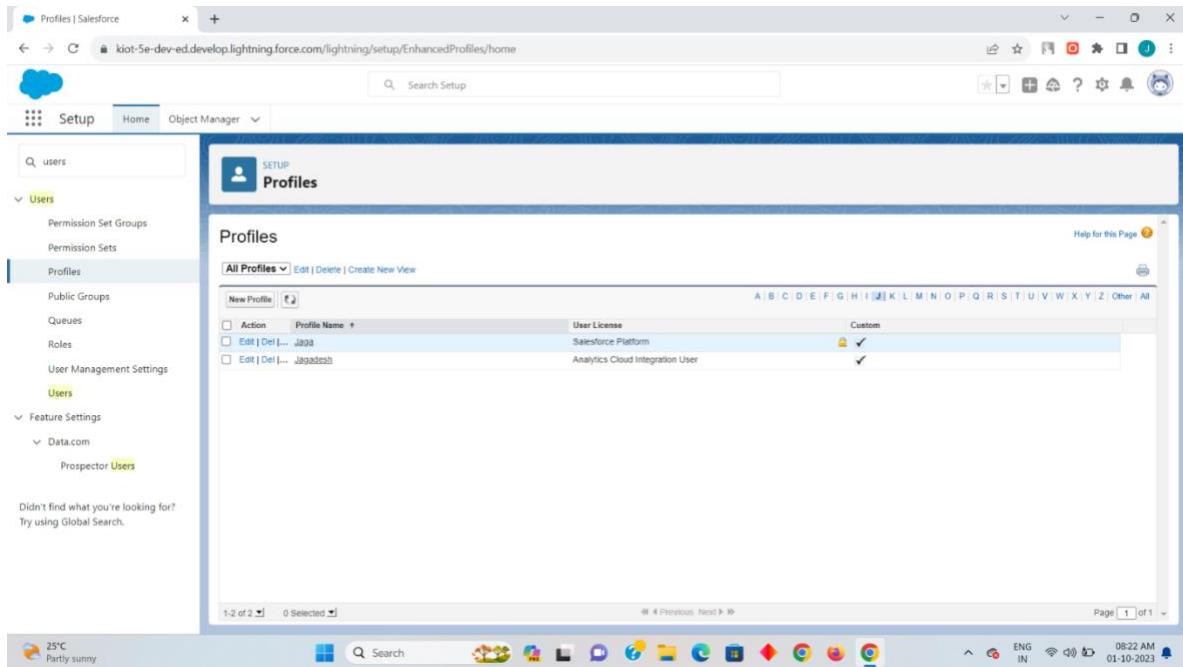
ENG IN 08:21 AM 01-10-2023

This screenshot is identical to the one above, showing the same Salesforce Setup interface and data on the Profiles page. The layout, components, and values are the same as in the first screenshot.



## Step 4

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



## Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along

with the profile as Jaga which we have created on the step 2.once the one user has been created click on the save&new so that you can create the second user and there the user name can be created with alternate name but with the same user profile and once the two user are created click on save.

| Action                   | Full Name      | Alias            | Username  | Role                                   | Active                              | Profile                          |
|--------------------------|----------------|------------------|---|--|-------------------------------------|----------------------------------|
| <input type="checkbox"/> | Chatter_Expert | Chatter          | chatty.00d500000c0joseaf.6z@berksh4i@chatter.salesforce.com |  | <input checked="" type="checkbox"/> | Chatter Free User                |
| <input type="checkbox"/> | Edit           | Grey_Jane        | jgrey.jane_gray.hyngrmnoam.cz7dz2koogt3@gmail.com           |  | <input checked="" type="checkbox"/> | Customer Community User          |
| <input type="checkbox"/> | Edit           | S.Jaga           | jaga269@gmail.com   | CEO                                    | <input type="checkbox"/>            | Standard Platform User           |
| <input type="checkbox"/> | Edit           | S.Jagadeesh      | JS  | SF Admin                               | <input checked="" type="checkbox"/> | System Administrator             |
| <input type="checkbox"/> | Edit           | S.Jagadeesh      | JS  | Channel Sales Team                     | <input type="checkbox"/>            | Standard Platform User           |
| <input type="checkbox"/> | Edit           | User_Integration | Integ   | Integration@00d500000cd@seaf.com       | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> | Edit           | User_Security    | sec   | Insightssecurity@00d500000c0joseaf.com | <input checked="" type="checkbox"/> | Analytics Cloud Security User    |

Users | Salesforce

Setup Home Object Manager

Search Setup

New User

User Edit Save Save & New Cancel

General Information

First Name: Jagadeesh11  
Last Name: S  
Alias: J  
Email: jnver123@gmail.com  
Username: jnver123@gmail.com  
Nickname: User169612875144962592  
Title:   
Company:   
Department:   
Division:

Role: Director, Channel Sales  
User License: Salesforce Platform  
Profile: -None-  
Active:  Jaga Standard Platform User  
Marketing User:   
Office User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type: -None-  
Data.com Monthly Addition Limit: Default Limit (300)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

Help for this Page

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

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Users | Salesforce

Setup Home Object Manager

Search Setup

New User

User Edit Save Save & New Cancel

General Information

First Name: Jagadeesh22  
Last Name: S  
Alias: J  
Email: jnaf1@gmail.com  
Username: jnaf1@gmail.com  
Nickname: User169612879963618745  
Title:   
Company:   
Department:   
Division:

Role: Marketing Team  
User License: Salesforce Platform  
Profile: -None-  
Active:  Jaga Standard Platform User  
Marketing User:   
Office User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type: -None-  
Data.com Monthly Addition Limit: Default Limit (300)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

Help for this Page

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

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08:23 AM 01-10-2023 ENG IN

Users | Salesforce

Setup Home Object Manager

Search Setup

All Users

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

In addition, download Salesforce@ to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users Create New View

| Action                              | Full Name         | Alias | Username           | Role                    | Active                              | Profile                |
|-------------------------------------|-------------------|-------|--------------------|-------------------------|-------------------------------------|------------------------|
| <input type="checkbox"/>            | Ent S.Jaga        | J     | jnaf1@gmail.com    | CEO                     | <input type="checkbox"/>            | Standard Platform User |
| <input type="checkbox"/>            | Ent S.Jagadeesh   | J     | jnaf1@gmail.com    | SF Admin                | <input checked="" type="checkbox"/> | System Administrator   |
| <input type="checkbox"/>            | Ent S.Jagadeesh   | J     | jnaf117@gmail.com  | Channel Sales Team      | <input type="checkbox"/>            | Standard Platform User |
| <input checked="" type="checkbox"/> | Ent S.Jagadeesh11 | J     | jnver123@gmail.com | Director, Channel Sales | <input checked="" type="checkbox"/> | Jaga                   |
| <input checked="" type="checkbox"/> | Ent S.Jagadeesh22 | J     | jnaf1@gmail.com    | Marketing Team          | <input checked="" type="checkbox"/> | Jaga                   |

New User Reset Password(s) Add Multiple Users

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

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08:24 AM 01-10-2023 ENG IN

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

## Step 6:

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

setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Did you find what you're looking for?  
Try using Global Search.

On this page you can create, view, and manage permission sets.  
In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | Edit | Delete | Create New View

New

| Action                   | Permission Set Label                | Description   | License   |
|--------------------------|-------------------------------------|---|---|
| <input type="checkbox"/> | Buyer                               | Allows access to the store. Lets users see products and categories, includes all buyer capabilities, and allows access to manage carts and... | B2B Buyer Permission Set One Seat                     |
| <input type="checkbox"/> | Buyer Manager                       | Denotes that the user is a Sales Cloud or Service Cloud user.   | B2B Buyer Manager Permission Set One Seat             |
| <input type="checkbox"/> | CRM User                            | Denotes that the user is a Sales Cloud or Service Cloud user.   | CRM User  |
| <input type="checkbox"/> | Commerce Admin                      | Allow access to commerce admin features.  | Commerce Admin Permission Set License Seat            |
| <input type="checkbox"/> | Contact Center Admin                | Manage Service Cloud Voice contact centers that use Amazon Connect.   | Service Cloud Voice User                              |
| <input type="checkbox"/> | Contact Center Agent                | Access agent features in Service Cloud Voice contact centers that use...  | Service Cloud Voice User                              |
| <input type="checkbox"/> | Contact Center Supervisor           | Access supervisor features in Service Cloud Voice contact centers th...   | Service Cloud Voice User                              |
| <input type="checkbox"/> | Delinquent                          | Experiences Profile Manager   | Salesforce  |
| <input type="checkbox"/> | Field Service Manager               | Lets users create, read, edit, and delete locations, sublocations, queu...  | Facility Manager                                      |
| <input type="checkbox"/> | FoodServiceMobileChangerPermSet     | Give your mobile workforce access to the Food Service mobile app. S...  | Food Service Host                                     |
| <input type="checkbox"/> | Merchandise                         | Allow access to commerce merchandising features.  | Commerce Merchandise User Permission Set License Seat |
| <input type="checkbox"/> | Order Management Agent              | Read Access to all entities enabled by Order Management.  | Lightning Order Management User                       |
| <input type="checkbox"/> | Order Management Operations Manager | Access to all features enabled by Order Management.   | Lightning Order Management User                       |

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

1-25 of 30 | 0 Selected

Page | 1 | of 2

https://kiot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/home

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Q Search

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Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Did you find what you're looking for?  
Try using Global Search.

On this page you can create, view, and manage permission sets.  
In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

Help for this Page

Permission Set Create

Enter permission set information

Label:  API Name:  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:

Save Cancel

https://kiot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/page?address=%2FPermissionSet%2FnewPermissionSet.apexp

25°C Partly sunny

Q Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgt%3FsfdclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didnt find what you're looking for?  
Try using Global Search.

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API Name permission12  
Namespace Prefix  
Created by Jagadish S. 01/10/2023, 8:24 am

Video Tutorial | Help for this Page

Permission Set Overview

Description  
License  
Session Activation Required  
Last Modified By Jagadish S. 01/10/2023, 8:24 am

Apps

Assigned Apps  
Assigned Connected Apps  
Object Settings  
Apex Class Access  
Visualforce Page Access  
External Data Source Access

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ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgt%3Ds%3DEntityPermissions

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didnt find what you're looking for?  
Try using Global Search.

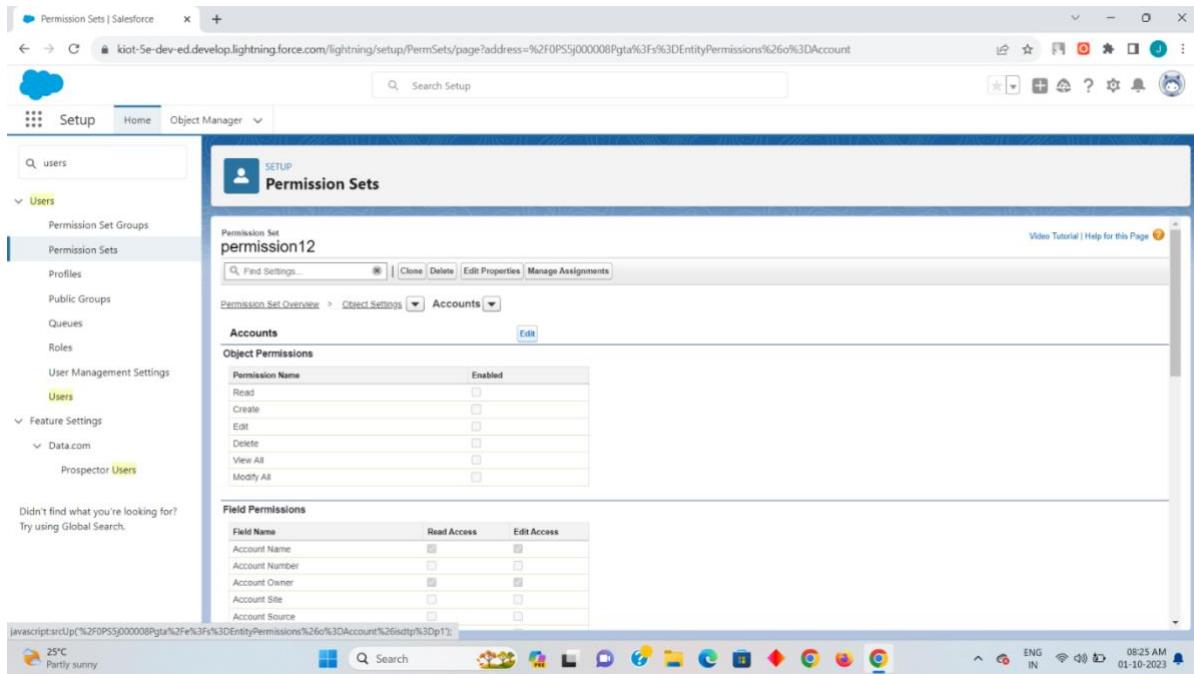
25°C Partly sunny

Object Settings

| Object Name                     | Object Permissions | Total Fields | Tab Settings |
|---------------------------------|--------------------|--------------|--------------|
| Account Brands                  | No Access          | 9            | --           |
| Accounts                        | No Access          | 44           | --           |
| AI Insight Reasons              | No Access          | --           | --           |
| AI Recent Insights              | No Access          | --           | --           |
| Alternative Payment Methods     | No Access          | 27           | --           |
| API Anomaly Event Stores        | No Access          | 14           | --           |
| Age Analytics Query Requests    | No Access          | --           | --           |
| Application Usage Assessments   | No Access          | --           | --           |
| Appointment Categories          | No Access          | 3            | --           |
| Appointment Invitations         | No Access          | 17           | --           |
| Appointment Invites             | --                 | 4            | --           |
| Appointment Schedule Aggregates | No Access          | --           | --           |
| Appointment Schedule Logs       | No Access          | --           | --           |
| Appointment Topic Time Slots    | No Access          | 6            | --           |
| Asset Actions                   | No Access          | 30           | --           |
| Asset Action Sources            | No Access          | 18           | --           |

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## 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 screenshots illustrate the configuration of a Permission Set named 'permission12' for the 'Accounts' object. In the 'Object Permissions' section, the 'Delete' checkbox is selected under the 'Enabled' column for the 'Accounts' permission. In the 'Field Permissions' section, the 'Delete' checkbox is also selected under the 'Edit Access' column for the 'Account' field.

## Step 8

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

The screenshot shows the 'Permission Sets | Salesforce' page in a browser. The URL is [kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/OPSS000008PgtA/PermissionSetAssignment/home](https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/OPSS000008PgtA/PermissionSetAssignment/home). The left sidebar is open, showing 'Users' selected under 'Permission Sets'. The main content area is titled 'permission12' and shows a section titled 'Current Assignments' with a decorative illustration of a cactus and sun. Below it, a message says 'No assignments defined.'

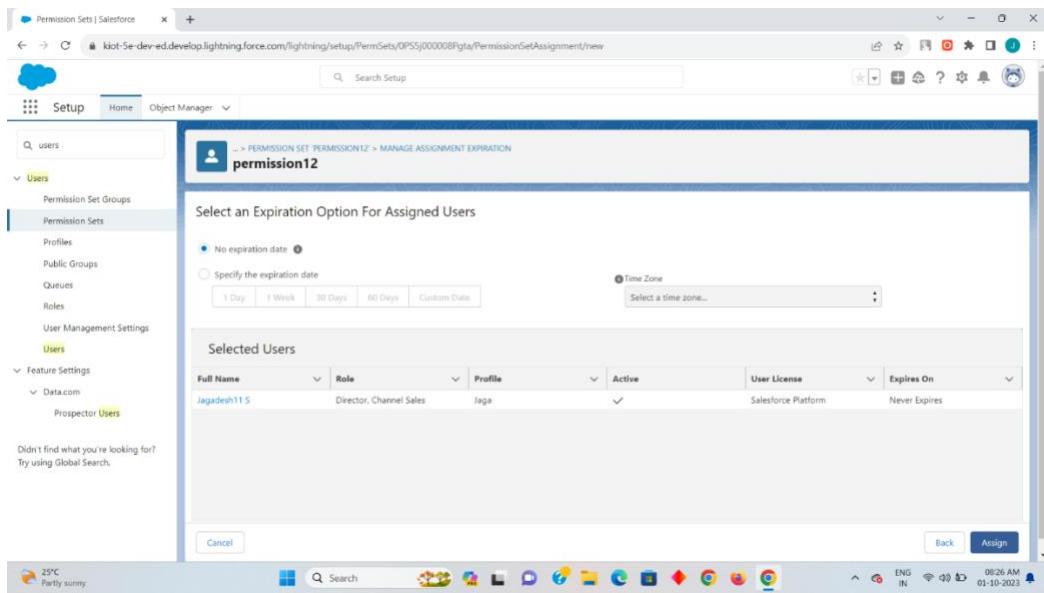
This screenshot shows the 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' step. The search bar at the top contains 'jagadesh'. The table lists four users: jagadesh, jagadesh11, jagadesh22, and jagadesh11. The 'jagadesh' row is highlighted. The 'Next' button is visible at the bottom right.

| Full Name  | Alias | Username           | Role                    | Active                              | Profile                |
|------------|-------|--------------------|-------------------------|-------------------------------------|------------------------|
| jagadesh   | JS    | wow@gmail.com      | SF Admin                | <input checked="" type="checkbox"/> | System Administrator   |
| jagadesh   | JS    | jaga1117@gmail.com | Channel Sales Team      | <input type="checkbox"/>            | Standard Platform User |
| jagadesh11 | JB    | jww123@gmail.com   | Director, Channel Sales | <input checked="" type="checkbox"/> | Jaga                   |
| jagadesh22 | JB    | jaat@gmail.com     | Marketing Team          | <input checked="" type="checkbox"/> | Jaga                   |

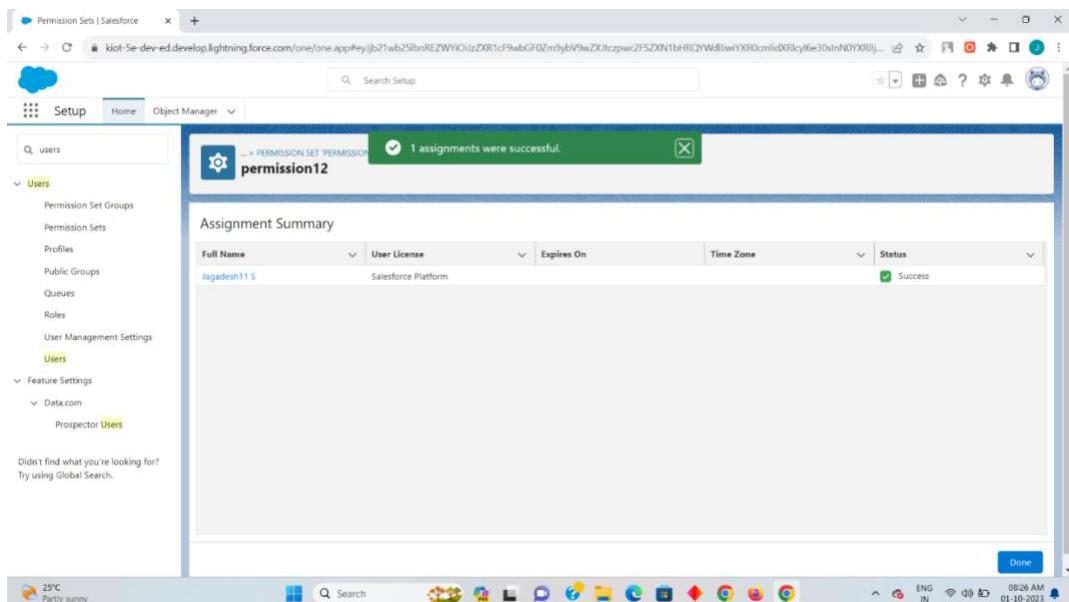
This screenshot shows the same 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' step. Now, only the 'jagadesh11' row is selected, indicated by a checked checkbox in the 'Active' column. The 'Next' button is visible at the bottom right.

| Full Name         | Alias     | Username                | Role                           | Active                                     | Profile                |
|-------------------|-----------|-------------------------|--------------------------------|--|------------------------|
| jagadesh          | JS        | wow@gmail.com           | SF Admin                       | <input checked="" type="checkbox"/>        | System Administrator   |
| jagadesh          | JS        | jaga1117@gmail.com      | Channel Sales Team             | <input type="checkbox"/>                   | Standard Platform User |
| <b>jagadesh11</b> | <b>JB</b> | <b>jww123@gmail.com</b> | <b>Director, Channel Sales</b> | <b><input checked="" type="checkbox"/></b> | <b>Jaga</b>            |
| jagadesh22        | JB        | jaat@gmail.com          | Marketing Team                 | <input checked="" type="checkbox"/>        | Jaga                   |

Click on next.



Now click on Assign.



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

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

Solution:

#### Step 1: Create a Custom Object

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

1. Click **Setup**.
2. In the Object Manager, click **Create | Custom Object**.
3. Now create a custom object **Survey Result** and fields as shown in the screenshot below:
4. Click **Save**.

| Fields & Relationships                |                    | FIELD LABEL      | FIELD NAME         | DATA TYPE | CONTROLLING FIELD | INDEXED |
|---------------------------------------|--------------------|------------------|--------------------|-----------|-------------------|---------|
| Page Layouts                          | Comment            | Comment__c       | Text Area(255)     |           |                   |         |
| Lightning Record Pages                | Created By         | CreatedById      | Lookup(User)       |           |                   |         |
| Buttons, Links, and Actions           | Email              | Email__c         | Email              |           |                   |         |
| Compact Layouts                       | Last Modified By   | LastModifiedById | Lookup(User)       |           |                   |         |
| Field Sets                            | Name               | Name__c          | Text(51)           |           |                   |         |
| Object Limits                         | Owner              | OwnerId          | Lookup(User,Group) |           | ✓                 |         |
| Record Types                          | Rating             | Rating__c        | Picklist           |           |                   |         |
| Related Lookup Filters                | Survey Result Name | Name             | Auto Number        |           | ✓                 |         |
| Search Layouts                        |                    |                  |                    |           |                   |         |
| Search Layouts for Salesforce Classic |                    |                  |                    |           |                   |         |
| Triggers                              |                    |                  |                    |           |                   |         |
| Validation Rules                      |                    |                  |                    |           |                   |         |

## Step 2: Create a Thank You For Survey Lightning Email Template

1. Click **App Launcher**.
2. In the Quick Find box, type **Email Templates**.
3. Clicks on the **New Email template** button.
4. Name the **Lightning Email Template** and make sure to store it in the **Public Email Templates** folder.
5. Create a template like the following screenshot.

Email Template  
**Thank You Email - Survey**

**Details** Related

**Information**

|   |                                      |
|---|--------------------------------------|
| Email Template Name<br>Thank You Email - Survey                       | Related Entity Type<br>Survey Result |
| Description   | Folder<br>Public Email Templates     |
| Made in Email Template Builder<br><input checked="" type="checkbox"/> |                                      |

**Message Content**

|   |   |
|---|---|
| Subject<br>Thank You For Completing Our Survey! | Enhanced Letterhead   |
| HTML Value                                      | <p>Hi {{{Survey_Result__c.Name__c}}},</p> <p>Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks,<br/>Automation Champion</p> |

**Additional Information**

|   |   |
|---|---|
| Created By<br>Rakesh Gupta, 12/21/2020, 4:23 PM | Last Modified By<br>Rakesh Gupta, 12/21/2020, 4:32 PM |
|---|---|

## Step 3: Create an Email Alert

- 1. Click Setup.**
- 2. In the Quick Find box, type Email Alerts.**
- 3. Select Email Alerts, click on the New Email Alert button.**
- 4. Name the Email Alert and click the Tab button. The Unique Name will populate.**

- 5. For Object select Survey Result.**
- 6. For the Email Template chooses Lightning Email Template Thank You Email – Survey.**
- 7. For Recipient Type select Email Field: Email.**
- 8. Click Save.**

**Edit Email Alert** Help for this Page ?

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

**Email Alert Edit**

**Edit Email Alert** ! = Required Information

| Description   | Survey - Thank You Email   |                      |                     |   |                    |  |  |
|---|--|----------------------|---------------------|---|--------------------|--|--|
| Unique Name   | Survey_Thank_You_Email <a href="#">i</a>   |                      |                     |   |                    |  |  |
| Object  | Survey Result  |                      |                     |   |                    |  |  |
| Email Template  | Thank You Email - Survey <a href="#">o</a>   |                      |                     |   |                    |  |  |
| Protected Component   | <input type="checkbox"/>   |                      |                     |   |                    |  |  |
| Recipient Type  | Search: <input type="text" value="User"/> <a href="#">o</a> for: <input type="text"/> <input type="button" value="Find"/>  |                      |                     |   |                    |  |  |
| Recipients  | <table border="1"> <thead> <tr> <th>Available Recipients</th> <th>Selected Recipients</th> </tr> </thead> <tbody> <tr> <td>User: Integration User<br/>User: Rakesh Gupta<br/>User: Security User</td> <td>Email Field: Email</td> </tr> <tr> <td style="text-align: center;"> <a href="#">Add</a><br/> <a href="#">◀</a><br/> <a href="#">Remove</a> </td> <td></td> </tr> </tbody> </table> | Available Recipients | Selected Recipients | User: Integration User<br>User: Rakesh Gupta<br>User: Security User | Email Field: Email | <a href="#">Add</a><br><a href="#">◀</a><br><a href="#">Remove</a> |  |
| Available Recipients  | Selected Recipients  |                      |                     |   |                    |  |  |
| User: Integration User<br>User: Rakesh Gupta<br>User: Security User   | Email Field: Email   |                      |                     |   |                    |  |  |
| <a href="#">Add</a><br><a href="#">◀</a><br><a href="#">Remove</a>  |  |                      |                     |   |                    |  |  |
| You can enter up to five (5) email addresses to be notified.  |  |                      |                     |   |                    |  |  |
| Additional Emails   | <input type="text"/>   |                      |                     |   |                    |  |  |
| From Email Address  | Current User's email address <a href="#">o</a>   |                      |                     |   |                    |  |  |
| <input type="checkbox"/> Make this address the default From email address for this object's email alerts. <a href="#">i</a> |  |                      |                     |   |                    |  |  |

**Step 4.1: Salesforce Flow — Create a Screen that Allow Users to Fill Survey**

- 1. Click Setup.**

2. In the Quick Find box, type **Flows**.
3. Select **Flows** then click on the **New Flow**.
4. Select the **Screen Flow** option and click on **Next** and configure the flow as follows:
  1. **How do you want to start building:** **Freeform**
5. We will use the **Screen** element to capture a **Survey response** form. Drag and drop a **Screen** element onto the canvas.

## Step 4.2: Salesforce Flow — Add a Record Creates Element to Save Survey Response

1. Drag-and-drop the **Create Records** element onto the Flow designer.
2. Enter a name in the **Label (Save Response)** field; the **API Name** will auto-populate.
3. For **How Many Records to Create** – select **One**.
4. For **How to Set the Record Fields** – select **Use separate resources, and literal values**.
5. Select the **Survey\_Result\_\_c** object from the dropdown list.
6. **Set Field Values for the Survey Result**
  1. Row 1:
    1. **Field: Comment\_\_c**

2. **Value:** `{!Comment}`
2. Click **Add Row**
3. Row 2:
  1. **Field:** `Email__c`
  2. **Value:** `{!Email.value}`
4. Click **Add Row**
5. Row 3:
  1. **Field:** `Name__c`
  2. **Value:** `{!Name.firstName}`  
`{!Name.lastName}`
6. Click **Add Row**
7. Row 3:
  1. **Field:** `Rating__c`
  2. **Value:** `{!Rating}`
7. Click **Done.**

Edit Create Records

Create Salesforce records using values from the flow.

\* Label: Save Response      \* API Name: Save\_Response

Description:

How Many Records to Create  
 One  
 Multiple

How to Set the Record Fields  
 Use all values from a record  
 Use separate resources, and literal values

Create a Record of This Object  
\* Object: Survey Result

Set Field Values for the Survey Result

| Field  | Value   |
|--|---|
| Comment__c   | <input type="text" value="A_a Comment"/>                        |
| Email__c   | <input type="text" value="A_a Email &gt; Value"/>               |
| Name__c  | <input type="text" value="(!Name.firstName) {!Name.lastName}"/> |
| Rating__c  | <input type="text" value="A_a Rating"/>                         |
| <a href="#">+ Add Field</a>                        |   |
| <input type="checkbox"/> Manually assign variables |   |

Cancel      Done

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

The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.

## 4. Clicks on the Survey – Thank You Email email alert.

### 5. Click Done.

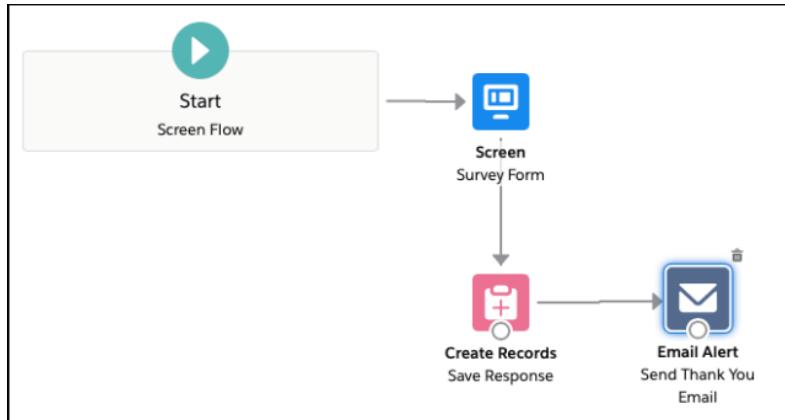
Edit "Survey - Thank You Email" email alert

Use values from earlier in the flow to set the inputs for the "Survey - Thank You Email" email alert. To use its outputs later in the flow, store them in variables.

|                      |                      |
|----------------------|----------------------|
| * Label              | * API Name           |
| Send Thank You Email | Send_Thank_You_Email |
| Description          |                      |
|                      |                      |
| Set Input Values     |                      |
| A_a * Record ID      | {!Save_Response}     |

Cancel Done

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



### 1. Click Save.

2. Enter Flow Label the API Name will auto-populate.

3. Click Show Advanced.

## 4. How to Run the Flow: User or System Context—Depends on How Flow is Launched

5. Type: Screen Flow

6. API Version for Running the Flow: 51

7. Interview Label: Survey

{!\$Flow.CurrentDateTime}

8. Click Save.

Save as

A New Version A New Flow

\* Flow Label \* Flow API Name

Survey Survey

Description

Hide Advanced

How to Run the Flow i

User or System Context—Depends on How Flow is Launched

\* Type

Screen Flow

\* API Version for Running the Flow

51

Interview Label i

Insert a resource... 🔍

Survey {!\$Flow.CurrentDateTime}

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

Status: Active

Type: Screen Flow

Version Number: 2

Cancel Save

The screenshot shows the 'Save as' dialog for creating a new flow. The 'A New Version' button is highlighted. The flow is titled 'Survey'. The 'How to Run the Flow' setting is 'User or System Context—Depends on How Flow is Launched'. The flow type is 'Screen Flow' and the API version is '51'. The interview label is set to the formula '{!\$Flow.CurrentDateTime}'. The status is 'Active', the type is 'Screen Flow', and the version number is 2. The 'Save' button is visible at the bottom.

## Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a Visualforce Page

Now we will create a Lightning Application that declares a dependency on the **lightning:flow** component.

1. Click **Setup | Developer Console**
2. Navigate to **File | New | Lightning Application**
3. Enter a **Name (VFPPageToLC)** field, make sure to select the **Lightning Out Dependency App** checkbox.
4. Click **Submit**.
5. Copy code from [\*\*GitHub\*\*](#) and paste it into your Lightning Application.
6. **Save** your code.

The screenshot shows the Salesforce IDE interface. At the top, there is a menu bar with options like File, Edit, Debug, Test, Workspace, Help, and navigation arrows. Below the menu is a tab bar with 'VFPageToLC.app \*'. The main area contains the following code:

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

At the bottom of the interface, there is a blue bar labeled 'Logs, Tests, and Problems'.

## Step 6: Create a Visualforce Page and Embed Your Flow Into It

Now we will create a Lightning Application that declares a dependency on the **lightning:flow** component.

Add the Lightning Components for Visualforce JavaScript library to your Visualforce page using the **<apex:includeLightning/>** component. In the Visualforce page, reference the dependency app. Then write a JavaScript function that creates the

# component on the page using `$Lightning.createComponent()`

1. Click **Setup**.
2. In the Quick Find box, type **Visualforce Pages**.
3. Clicks on the **New** button.
4. Copy code from [GitHub](#) and paste it into your visualforce page
5. Click **Save**.

The screenshot shows the Salesforce Visualforce Page Editor. At the top, there's a header with 'Visualforce Page' and 'Survey'. Below it is a 'Page Edit' toolbar with 'Save', 'Quick Save', 'Cancel', 'Where is this used?', 'Component Reference', and 'Preview' buttons. A note 'I = Required Information' is present. The main area has a 'Page Information' section where 'Label' and 'Name' are set to 'Survey', and a 'Description' field is empty. Under 'Available for Lightning Experience, Experience Builder sites, and the mobile app', the 'Checkmark' checkbox is checked. Under 'Require CSRF protection on GET requests', the checkbox is unchecked. Below this is a 'Visualforce Markup' tab which contains the following code:

```
<apex:page showheader="false" lightningStylesheets="true">
<html>
<head>
<apex:includeLightning />
<!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualforce page-->
</head>
<body class="slds-scope">
<div id="flowContainer" />
<script>
var statusChange = function (event) {
    if(event.getParam("status") === "FINISHED") {
        var outputVariables = event.getParam("outputVariables");
        var key;
        for(key in outputVariables) {
            if(outputVariables[key].name === "myOutput") {
                ...
            }
        }
    }
};
$Lightning.use("c:VFFPageToLC", function() {
    $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
        "flowContainer",
        function (component) {
            component.startFlow("Survey", );
        }
    );
});
</script>
</body>

```

## Step 7: Create a Force.com Site to Open Your Flow for Unauthenticated Access

Now we will create a site to open the flow for unauthenticated access.

1. Click **Setup**.

2. In the Quick Find box, type **Sites**.
3. Clicks on the **New** button.
4. Fill the details as per the screenshot below:
5. Click **Save**.

**Site Edit**

**Save** **Cancel**

|   |   |           |
|---|---|-----------|
| Site Label  | Survey  |           |
| Site Name   | Survey  |           |
| Site Description                                  | <br><br><br>  |           |
| Site Contact                                      | Rakesh Gupta  |           |
| Default Record Owner                              | Rakesh Gupta  |           |
| Default Web Address                               | http://kathiarch-developer-edition.gus.force.com/survey |           |
| Active  | <input checked="" type="checkbox"/>                     |           |
| Active Site Home Page                             | Survey  | [Preview] |
| Inactive Site Home Page                           | InMaintenance   | [Preview] |
| Site Template                                     | SiteTemplate  |           |
| Site Robots.txt                                   | <br><br><br>  |           |
| Site Favorite Icon                                | <br><br><br>  |           |
| Analytics Tracking Code                           | <br><br><br>  |           |
| URL Rewriter Class                                | <br><br><br>  |           |
| Enable Feeds                                      | <br><br><br>  |           |
| Clickjack Protection Level                        | Allow framing by the same origin only (Recommended)     |           |
| Require Secure Connections<br>(HTTPS)             | <input checked="" type="checkbox"/>                     |           |
| Lightning Features for Guest<br>Users             | <input checked="" type="checkbox"/>                     |           |
| Upgrade all requests to HTTPS                     | <input checked="" type="checkbox"/>                     |           |
| Enable Content Sniffing<br>Protection             | <input checked="" type="checkbox"/>                     |           |
| Enable Browser Cross Site<br>Scripting Protection | <input checked="" type="checkbox"/>                     |           |
| Referrer URL Protection                           | <input checked="" type="checkbox"/>                     |           |
| Guest Access to the Payments<br>API               | <input type="checkbox"/>                                |           |

Under site, **Public Access Settings** make sure that guest users have **Create** access on **Survey Result** object and **Edit** on the **fields**.

## Proof of Concept

Now onward, if someone opens the site url and fills the form:

**Survey**

Name

First Name  
Alok

Last Name  
Sinfal

\*Email  
[REDACTED]

\*Rating  
5

\*Comment  
Awesome Blog 

**Next**

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

Thank You For Completing Our Survey!  [Inbox](#) 

 **Survey Site Guest User** via [bj9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com](#) to me  8:09 PM (1 minute ago)   

Hi Alok Sinfal,

Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.

Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.

Thanks,  
Automation Champion