

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

**Name :Sivashankari S
Naan Mudhalvan id :
au611420205039
Year & Dep : 4th 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.

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

| | | | |
|--------------|----------|----------|----------|
| Label | college | Example: | Account |
| Plural Label | colleges | Example: | Accounts |

Starts with vowel sound

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

| | | | |
|-------------|---------|----------|---------|
| Object Name | college | Example: | Account |
|-------------|---------|----------|---------|

Description

Context-Sensitive Help Setting

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

Content Name

Record Name

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

| | | | |
|-------------|--------------|----------|--------------|
| Record Name | College Name | Example: | Account Name |
|-------------|--------------|----------|--------------|

Data Type

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

What is this?

Deployed

Search Status

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

Allow Search

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

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

Save Save & New Cancel

Second custom objects, let's call them "Department_C"

The screenshot shows the Salesforce Setup Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. The main title is 'Object Manager' with a 'New Custom Object' sub-section. A message bar at the top says 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles.' Below this is the 'Custom Object Definition Edit' form.

Custom Object Information

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

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

- Object Name: department (Example: Account)

Description: (Empty text area)

Context-Sensitive Help Setting:

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

Content Name:

Enter Record Name Label and Format

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

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

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing ([Learn more](#))

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

Buttons at the bottom: Save, Save & New, Cancel.

Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College_c" to open its

settings.

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

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

Header: Search Setup, Setup, Home, Object Manager

Breadcrumbs: SETUP > OBJECT MANAGER CDepartment

Left Sidebar (Details):

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

Right Panel (Details):

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

Buttons: Edit, Delete

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

Header: Search Setup, Setup, Home, Object Manager

Breadcrumbs: SETUP > OBJECT MANAGER CDepartment

Left Sidebar (Fields & Relationships):

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

Right Panel (New Relationship):

Step 3. Enter the label and name for the lookup field (Step 3 of 6)

Field Label: college

Field Name: college

Description:

Help Text:

Child Relationship Name: CDepartments

Sharing Setting:

- 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 entity

Buttons: Previous, Next, Cancel

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "CDepartment New Relationship" and "Step 2. Choose the related object". It shows a dropdown menu set to "college". Navigation buttons at the top right include "Help for this Page", "Previous", "Next", and "Cancel".

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various object settings. The main area is titled "CDepartment New Custom Field" and "Step 1. Choose the field type". Under "Data Type", the "Roll Up Summary" option is selected. A detailed description of the field type is provided, mentioning it creates a relationship that links the object to another object. The "Next" button is visible at the top right.

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.**

SETUP > OBJECT MANAGER
CDepartment

Details

Fields & Relationships

4 Items, Sorted by Field Label

| 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) | | |

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

SETUP

Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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 | New | What Is This? |
|------------|-------------------|-----|---------------|
| Edit Del | Block1 | | Box |
| Edit Del | Research Proposal | | Square |
| Edit Del | student | | Box |

Web Tabs

New | What Is This?

No Web Tabs have been defined.

Visualforce Tabs

New | What Is This?

No Visualforce Tabs have been defined.

Lightning Component Tabs

New | What Is This?

No Lightning component tabs have been defined.

Lightning Page Tabs

New | What Is This?

No Lightning Page Tabs have been defined.

Setup > OBJECT MANAGER

college

New Custom Field

Step 5. Add to page layouts

Step 5 of 5

Fields & Relationships

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

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

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

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

Add Field **Page Layout Name**
 college Layout

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

Help for this Page

Previous **Save & New** **Save** **Cancel**

Setup > OBJECT MANAGER

college

New Custom Field

Step 4. Establish field-level security

Step 4 of 5

Fields & Relationships

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

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

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

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

Help for this Page

Previous **Next** **Cancel**

Setup > Object Manager college

New Custom Field

Step 3. Define the summary calculation Step 3 of 5

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

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

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

Help for this Page

Setup > Object Manager college

New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label: Total count
 Field Name: Total_count
 Description:
 Help Text:

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

Help for this Page

New Custom Field

Step 1. Choose the field type

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

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Roll-Up Summary 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.
- Lookup Relationship A relationship 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.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of detail records 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.
- Boolean Allows users to select a True (checked) or False (unchecked) value.

Fields & Relationships
4 Items, Sorted by Field Label

| 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.**

Setup Home Object Manager

Search Setup

User Interface Rename **Tabs** and Labels

New Custom Object Tab

Step 2 of 3

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 |

Previous Next Cancel

The screenshot shows the Salesforce Setup interface for creating a new custom object tab. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The left sidebar has sections for 'User Interface' (selected), 'Rename Tabs and Labels', and 'Tabs'. A message at the bottom says 'Didn't find what you're looking for? Try using Global Search.'

New Custom Object Tab

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 | college |
| Tab Style | Jewel |

(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**

The screenshot shows the Salesforce Setup interface for adding a new custom tab to custom apps. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The left sidebar has sections for 'User Interface' (selected), 'Rename Tabs and Labels', and 'Tabs'. A message at the bottom says 'Didn't find what you're looking for? Try using Global Search.'

Step 3. Add to Custom Apps Step 3 of 3

Choose the custom apps 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 Custom App.

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

Previous **Save** **Cancel**

New Custom Object Tab

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 | 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--

Description:

Next Cancel

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

| App Name ↑ | Developer Name | Description | Last Modified Date | App ... | Visi... ↓ |
|-----------------------|--------------------------|---|----------------------|-----------|-----------|
| 1 All Tabs | AllTabSet | Build CRM Analytics dashboards and apps | 14/07/2023, 10:47 am | Classic | ✓ |
| 2 Analytics Studio | Insights | Discover and manage business solutions designed for your industry. | 14/07/2023, 10:47 am | Classic | ✓ |
| 3 App Launcher | AppLauncher | App Launcher tabs | 14/07/2023, 10:47 am | Classic | ✓ |
| 4 Bolt Solutions | LightningBolt | Discover and manage business solutions designed for your industry. | 14/07/2023, 10:47 am | Lightning | ✓ |
| 5 Community | Community | Salesforce CRM Communities | 14/07/2023, 10:47 am | Classic | ✓ |
| 6 Content | Content | Salesforce CRM Content | 14/07/2023, 10:47 am | Classic | ✓ |
| 7 Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manage recipes. | 14/07/2023, 10:47 am | Lightning | ✓ |
| 8 Digital Experiences | SalesforceCMS | Manage content and media for all of your sites. | 14/07/2023, 10:47 am | Lightning | ✓ |
| 9 Lightning Usage App | LightningInstrumentation | View Adoption and Usage Metrics for Lightning Experience | 14/07/2023, 10:47 am | Lightning | ✓ |
| 10 Marketing | Marketing | Best-in-class on-demand marketing automation | 14/07/2023, 10:47 am | Classic | ✓ |
| 11 Platform | Platform | The fundamental Lightning Platform | 14/07/2023, 10:47 am | Classic | ✓ |
| 12 Queue Management | QueueManagement | Create and manage queues for your business. | 14/07/2023, 10:47 am | Lightning | ✓ |
| 13 Sales | Sales | The world's most popular sales force automation (SFA) solution | 14/07/2023, 10:47 am | Classic | ✓ |
| 14 Sales | LightningSales | Manage your sales process with accounts, leads, opportunities, and more | 14/07/2023, 10:47 am | Lightning | ✓ |
| 15 Sales Console | LightningSalesConsole | (Lightning Experience) Lets sales reps work with multiple records on one screen | 14/07/2023, 10:47 am | Lightning | ✓ |
| 16 Salesforce Chatter | Chatter | The Salesforce Chatter social network, including profiles and feeds. | 14/07/2023, 10:47 am | Classic | ✓ |

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'User Interface' and 'Rename Tabs and Labels'. The main content area is titled 'Custom Tabs' and includes a brief description of what custom tabs are. Below this is a table for 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. It lists tabs for 'Book1' (Box), 'CDepartments' (Lightning), 'college' (Jewel), 'Research_Proposal' (Square), and 'student' (Box). There are also sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a note indicating no tabs have been defined.

| Action | Label | Tab Style | Description |
|------------|-------------------|-----------|-------------|
| Edit Del | Book1 | Box | |
| Edit Del | CDepartments | Lightning | |
| Edit Del | college | Jewel | |
| Edit Del | Research_Proposal | Square | |
| Edit Del | student | Box | |

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.

MECW

My college colleges CDepartments student Content

Search...

New Contact Edit New Opportunity

Related Details

college Name
mecw

Total count
2

phone
9087116402

Email
kiot@gmail.com

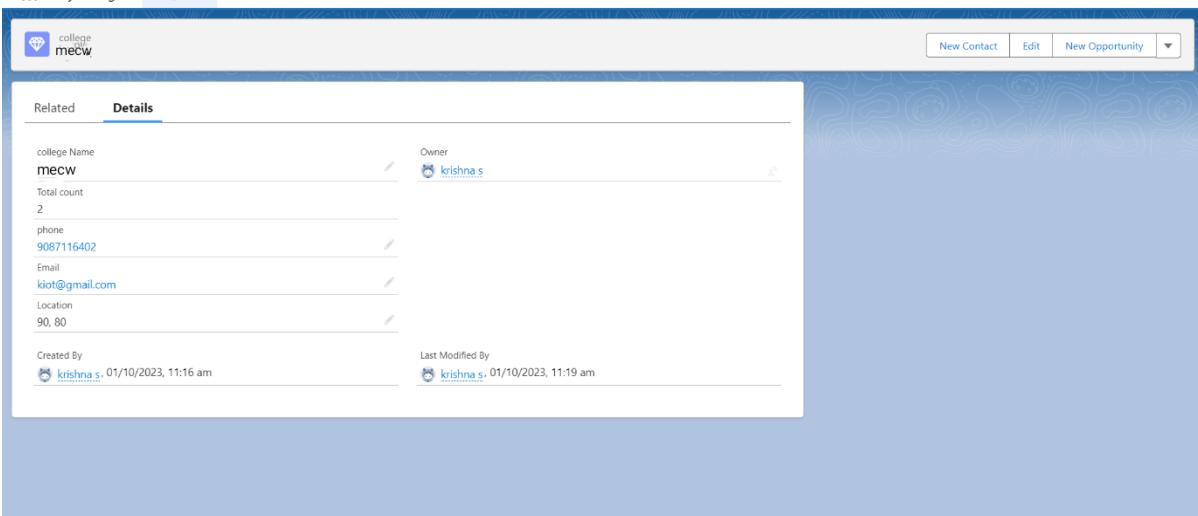
Location
90, 80

Owner
 krishna.s.

Created By
 krishna.s. 01/10/2023, 11:16 am

Last Modified By
 krishna.s. 01/10/2023, 11:19 am

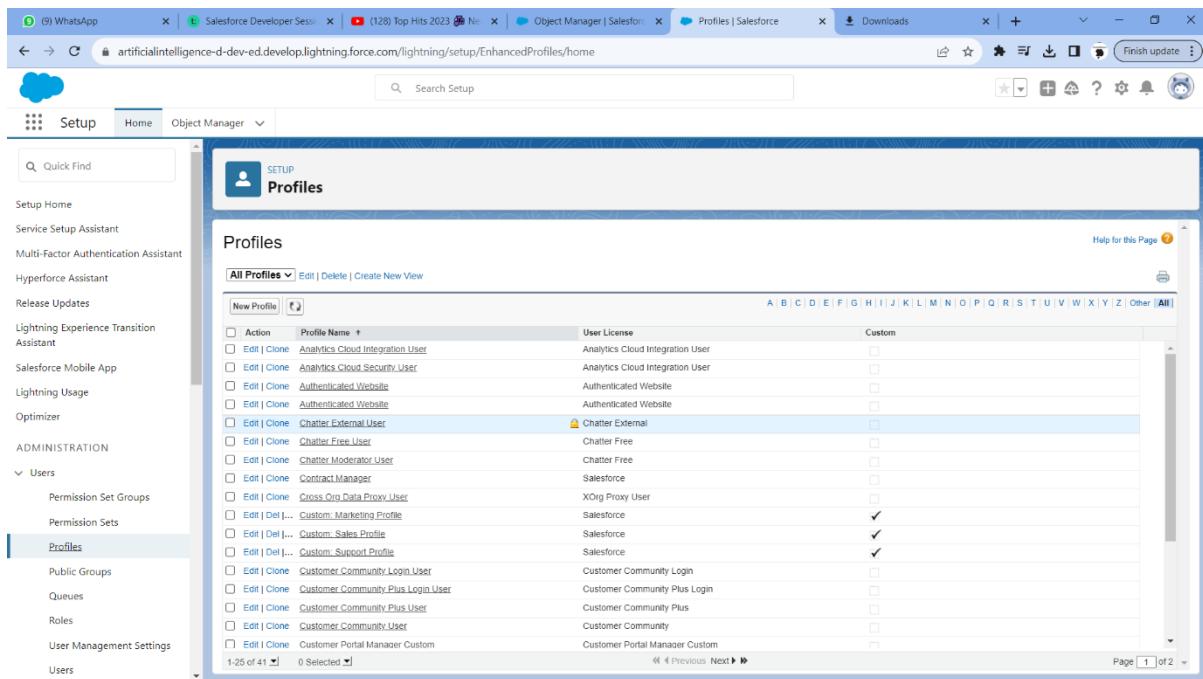
History



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

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' page open. The left sidebar is collapsed, and the main area displays a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains several checked checkboxes, indicating that these profiles have been customized. The profiles listed include 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authenticated Website', 'Authenticated 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', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'Custom' checkbox is checked for profiles like 'Custom: Marketing Profile', 'Custom: Sales Profile', and 'Customer Community User'.

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), and a Quick Find bar.

The main content area displays a table titled "Profiles" with the following data:

| 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"/> |

Page navigation at the bottom shows "1 of 7" and "0 Selected". A "Help for this Page" link is in the top right corner.

The screenshot shows the "Clone Profile" page in the Salesforce Setup interface. The left sidebar is identical to the previous screenshot. The main content area has a heading "Clone Profile" and a sub-instruction "Enter the name of the new profile." Below this, a message "You must select an existing profile to clone from." is displayed in red. A table shows the selected profile details: Existing Profile (Standard Platform User), User License (Salesforce Platform), and Profile Name (highlighted with a red box). At the bottom are "Save" and "Cancel" buttons.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. On the left, the navigation sidebar is open, showing various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, and Administration (with sub-options for Users, Permission Set Groups, and Profiles). The main content area is titled 'Clone Profile' and displays a form with the following fields:

| | |
|------------------|------------------------|
| Existing Profile | Standard Platform User |
| User License | Salesforce Platform |
| Profile Name | Manage |

Below the form are 'Save' and 'Cancel' buttons. A note at the top states: "You must select an existing profile to clone from." A small note in the top right corner says "Help for this Page".

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The left sidebar is identical to the previous screenshot. The main content area is titled 'Profile Manager' and displays a table of profiles. One profile is listed:

| Name | Manager | Custom Profile |
|-------------------|---------|----------------|
| Standard Platform | Manager | ✓ |

Below the table, there is a section titled 'Page Layouts' which lists standard object layouts for various objects like Account, Opportunity, and Case.

Salesforce Developer Session | Top Hits 2023 | Object Manager | Profiles | Salesforce | Downloads | Finish update

Profiles

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

| Visible | Default | Visible | Default |
|---------------------------------------|-------------------------------------|-------------------------------|----------------------------------|
| <input type="checkbox"/> | <input checked="" type="radio"/> | <input type="checkbox"/> | <input checked="" type="radio"/> |
| Analytics Studio (standard__Insights) | | Platform (standard__Platform) | |
| App Launcher (standard__AppLauncher) | | WDC (standard__Work) | |
| kilot (kilot) | <input checked="" type="checkbox"/> | | <input type="radio"/> |

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

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

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

Salesforce Developer Session | Top Hits 2023 | Object Manager | Profiles | Salesforce | Downloads | Finish update

Profiles

Communication Subscription Channel Types

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

Communication Subscription Consents

| | | | | | |
|-------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| Contacts | <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"/> |
| Contact Point Consents | <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 type="checkbox"/> | <input type="checkbox"/> |

Custom Object Permissions

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

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

Salesforce Developer Session

Object Manager | Salesforce

Profiles | Salesforce

Downloads

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

SETUP

Profiles

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Sellers

Streaming Channels

Use External Credentials

Custom Object Permissions

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

| | Basic Access | Create | Edit | Delete | Data Administration |
|----------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 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

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

Object Manager | Salesforce

Profiles | Salesforce

Downloads

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

SETUP

Profiles

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Sellers

Streaming Channels

Use External Credentials

Custom Object Permissions

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

| | Basic Access | Create | Edit | Delete | Data Administration |
|----------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 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

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 | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

| | |
|---|---|
| User passwords expire in: | 90 days |
| Enforce password history: | 3 passwords remembered |
| Minimum password length: | 8 |
| Password complexity requirement: | Must include alpha and numeric characters |
| Password question requirement: | Cannot contain password |
| Maximum invalid login attempts: | 10 |
| Lockout effective period: | 15 minutes |
| Obfuscate secret answer for password resets: | <input type="checkbox"/> |
| Require a minimum 1 day password lifetime: | <input type="checkbox"/> |
| Don't immediately expire links in forgot password emails: | <input type="checkbox"/> |

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Users

All Users

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

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

View: All Users | Edit | Create New View

| Action | Full Name | Alias | Username | Role | Active | Profile |
|------------------------------|------------------|---------|---|-------------------------------------|-------------------------------------|----------------------------------|
| Edit Login | Antonia Dilya | dadan | test_dilya_pas_4e6b9b9wtk_tszrgqzbkox_3q8cf0yzwns_h43tkzy6mea@gmail.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | LJMS User |
| Edit | Chatter Export | Chatter | chatty_00d5000000cskskeah_lojhfmempjka@chatter.salesforce.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Chatter Free User |
| Edit Login | Ellington Amelia | aelli | amelia.ellington.1.46kxcp0odin6scyndcu4wh_hnbdlmvwvneho_wguctor1aly@gmail.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Standard Platform User |
| Edit | S_GOPAL | GS | kot120@mail.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | System Administrator |
| Edit | User_Integration | integ | integration@000500000bc8skkeab.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| Edit | User_Security | sec | insightssecurity@000500000bc8skkeab.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Analytics Cloud Security User |

Salesforce Developer Session | Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

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

Email: [] User License: Salesforce Integration

Username: [] Profile: Salesforce API Only System Integrations

Nickname: [] Active:

Title: [] Marketing User:

Company: [] Offline User:

Department: [] Knowledge User:

Division: [] Flow User:

Data.com User Type: [] Service Cloud User:

Data.com Monthly Addition Limit: Default Limit (300)

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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
Data
Email
PLATFORM TOOLS
Apps
Feature Settings

Salesforce Developer Session | Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmya Last Name: bala Role: <None Specified>

Email: 2k20cse179@kiot.ac.in User License: Salesforce Platform

Username: 2k21it@kiot.ac.in Profile: Manager

Nickname: User169616771282564526 Active:

Title: worker Marketing User:

Company: kiot bank Offline User:

Department:

Division:

Data.com User Type: [] Knowledge User:

Data.com Monthly Addition Limit: Default Limit (300)

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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
Data
Email
PLATFORM TOOLS
Apps
Feature Settings

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, a sidebar lists various setup categories like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, etc. The main content area displays the 'User Detail' page for a user named 'Sowmya bala'. The user's name is listed at the top, followed by a list of profile details. The 'Role' section indicates the user is a 'Manager'. Other details include email (2k20cse179@kiot.ac.in), nickname (User16961677128256452616), title (worker), company (kiot bank), and address (GMT+05:30 India Standard Time (Asia/Kolkata)). The 'Delegated Approver' section shows 'Only if I am an approver'. The 'Accessibility Mode' section has 'Classic Only' checked. The 'Federation ID' and 'App Registration' sections are also visible.

The screenshot shows a Gmail inbox with 5,318 messages. A new message from 'support@salesforce.com' is highlighted. The subject line is 'Welcome to Salesforce!'. The message body contains a 'Verify Account' button and a URL: <https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>. Below the URL, it says 'Again, welcome to Salesforce!' and includes a copyright notice: '© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.'

(9) WhatsApp x | (1) Salesforce Dev x | (128) Top Hits x | Object Manager x | Users | Sales x | Downloads x | Welcome to x | Recently Viewed x | Change Your x + - □ ×

Finish update



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 x +

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

Incognito Finish update



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

WATCH ON DEMAND

AIDay

© 2023 Salesforce, Inc. All rights reserved.

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.

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

Settings Log Out

DISPLAY DENSITY

✓ Comfy

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&navigationLocation=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

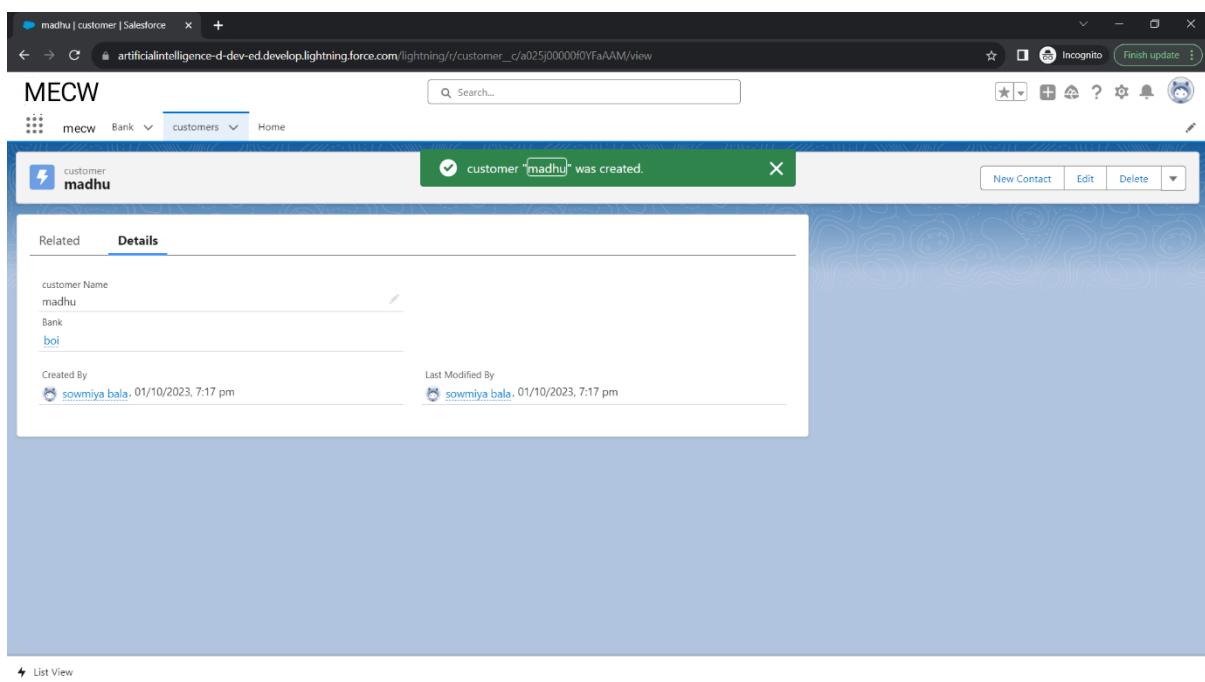
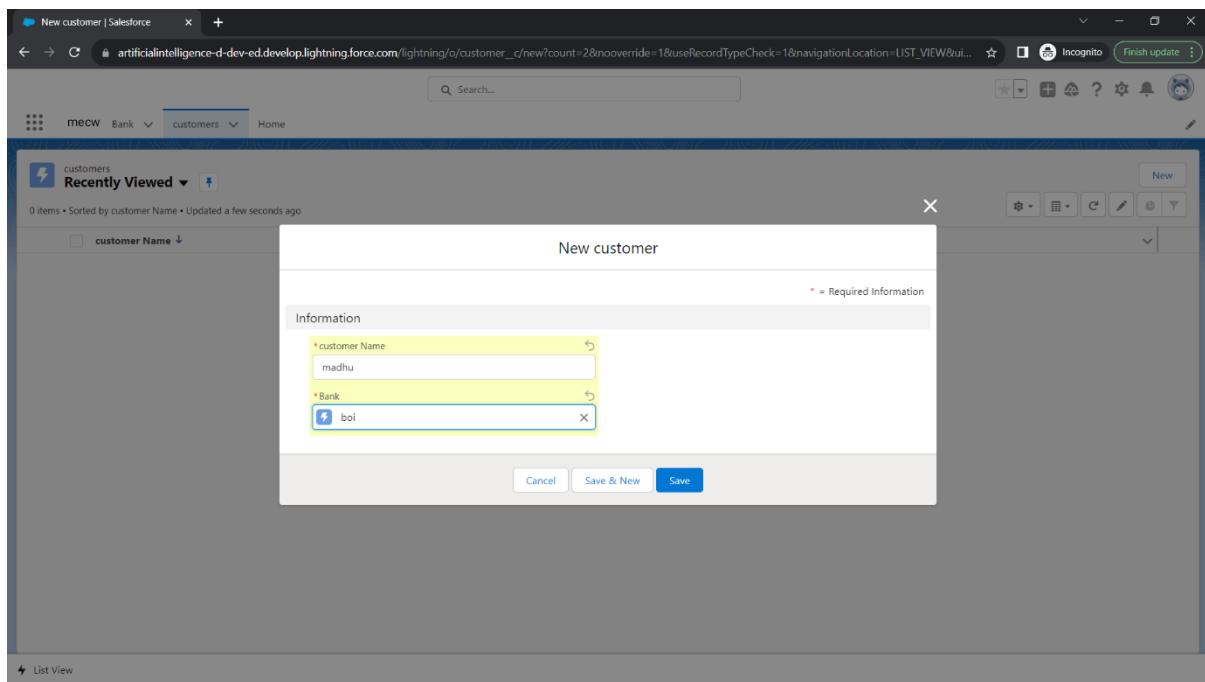
Bank Name: boi

Owner: sowmiya bala

phoneno: 0897754534

New Change Owner

Cancel Save & New Save



The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, the navigation sidebar includes options like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, 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 selected and highlighted in blue), Public Groups, Queues, Roles, and User Management Settings. The main content area displays a table titled 'Profiles' with the following data:

| 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"/> |

At the bottom of the page, there are navigation links for 'Previous' and 'Next', and a page number indicator 'Page 1 of 1'.

The screenshot shows the 'Clone Profile' dialog box. The title bar says 'Clone Profile'. The instructions 'Enter the name of the new profile.' are displayed above the input field. A required information indicator (a red square with an exclamation mark) is shown next to the instruction 'You must select an existing profile to clone from.'. The dialog contains the following fields:

| | |
|------------------|--|
| Existing Profile | Standard Platform User |
| User License | Salesforce Platform |
| Profile Name | <input type="text" value="salesmanager1"/> |

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce Verify

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.

Profile Detail

| | |
|-----------------------------------|---|
| Name: salesmanage | Custom Profile: <input checked="" type="checkbox"/> |
| User License: Salesforce Platform | Created By: SALESMA 01/10/2023, 7:19 pm |
| Description: | Modified By: SALESMA 01/10/2023, 7:19 pm |

Page Layouts

| Standard Object Layouts | Global | Operating Hours |
|----------------------------|--|--|
| Home Page Layout | [View Assignment] | Operating Hours [View Assignment] |
| Email Application | Not Assigned [View Assignment] | Order [View Assignment] |
| Appointment Invitation | Home Page Default [View Assignment] | Order Product [View Assignment] |
| Asset | Accounts Layout [View Assignment] | Payment [View Assignment] |
| Alternative Payment Method | Leads Layout [View Assignment] | Payment Authorization [View Assignment] |
| Queues | Opportunities Layout [View Assignment] | Payment Authorization Adjustment [View Assignment] |
| Roles | Product2 Layout [View Assignment] | Payment Gateway [View Assignment] |

Help for this Page

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce Verify

Profile Edit

Profile Edit

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

Custom App Settings

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

Service Provider Access

Tab Settings

Standard Tab Settings

| | |
|---------------|----------------------------------|
| Home | Default On |
| Accounts | <input checked="" type="radio"/> |
| Opportunities | <input type="radio"/> |

Learning: Default On

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce Verify

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

| | |
|---|---|
| User passwords expire in: | 90 days |
| Enforce password history: | 3 passwords remembered |
| Minimum password length: | 8 |
| Password complexity requirement: | Must include alpha and numeric characters |
| Password question requirement: | Cannot contain password |
| Maximum invalid login attempts: | 10 |
| Lockout effective period: | 15 minutes |
| Obfuscate secret answer for password reset: | <input type="checkbox"/> |
| Require a minimum 1 day password lifetime: | <input type="checkbox"/> |
| Don't immediately expire links in forgot password emails: | <input type="checkbox"/> |

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce Verify

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

| | |
|---|---|
| User passwords expire in: | 90 days |
| Enforce password history: | 3 passwords remembered |
| Minimum password length: | 8 |
| Password complexity requirement: | Must include alpha and numeric characters |
| Password question requirement: | Cannot contain password |
| Maximum invalid login attempts: | 10 |
| Lockout effective period: | 15 minutes |
| Obfuscate secret answer for password reset: | <input type="checkbox"/> |
| Require a minimum 1 day password lifetime: | <input type="checkbox"/> |
| Don't immediately expire links in forgot password emails: | <input type="checkbox"/> |

Save | Save & New | Cancel

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

User Edit

General Information

First Name: user

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:

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 yo... | + | Finish update

User Edit

General Information

First Name: madhu

Last Name: d

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: salesmanage

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:

Data.com Monthly Addition Limit: Default Limit (300)

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and a search bar. Under 'User Management Settings', 'Users' is expanded, showing sub-options like 'Feature Settings', 'Data.com', 'Prospector', 'Service', 'Embedded Service', 'User Interface', and 'App Menu'. The main content area displays the 'Users' configuration page with sections for 'Mailing Address', 'Single Sign On Information', 'Locale Settings', and 'Approver Settings'. The 'Mailing Address' section contains fields for Street, City, Zip/Postal Code, State/Province, and Country. The 'Single Sign On Information' section has a 'Federation ID' field. 'Locale Settings' include Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), and Language (English). 'Approver Settings' allow setting Delegated Approver and Manager, and selecting 'Receive Approval Request Emails' (set to 'Only if I am an approver'). A checkbox for generating a new password is checked. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

This screenshot is identical to the one above, but with specific address details populated in the 'Mailing Address' section. The 'Street' field contains '4/194, ariyampalayam, Uthamapalayam ..', the 'City' field contains 'SALEM', the 'Zip/Postal Code' field contains '636308', the 'State/Province' field contains 'TAMIL NADU', and the 'Country' field contains an empty value. All other settings remain the same as in the first screenshot.

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

User Detail

Name: madhu b
Alias: mb
Email: 2k20csit179@kiot.ac.in [Verify] [\(i\)](#)
Username: 2k20csit@kiot.ac.in
Nickname: User16961684242855419206 [\(i\)](#)
Title: worker
Company: kiot bank
Department: Sales
Division: Address: UTSI, arayampalayam, utthamasapuram, , Paraiakkadu , salem- 636308
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale: English (India)
Language: English
Delegated Approver:
Manager:
Receive Approval Request Emails: Only if I am an approver
Federation ID:
App Registration: One-Time Password Authenticator
Edit Sharing Reset Password Login Freeze

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

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!

© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.
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

salesforce

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.

New

Search...

List View

Recently Viewed | customers | S | +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer_c/list?filterName=Recent

MECW

customers Bank customers Home

Search...

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 | (1) Salesforce Developer Session | (128) Top Hits 2023 | (1) Permission Sets | Salesforce | (1) Welcome to Salesforce: V | (1) Reset Password | Salesforce | +

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

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

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

All Permission Sets | Edit | Delete | Create New View

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

1-25 of 29 | 0 Selected |

Previous Next | Page 1 of 2

<https://artificialintelligence-d-dev-ed.develop.lightning.force.com/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:

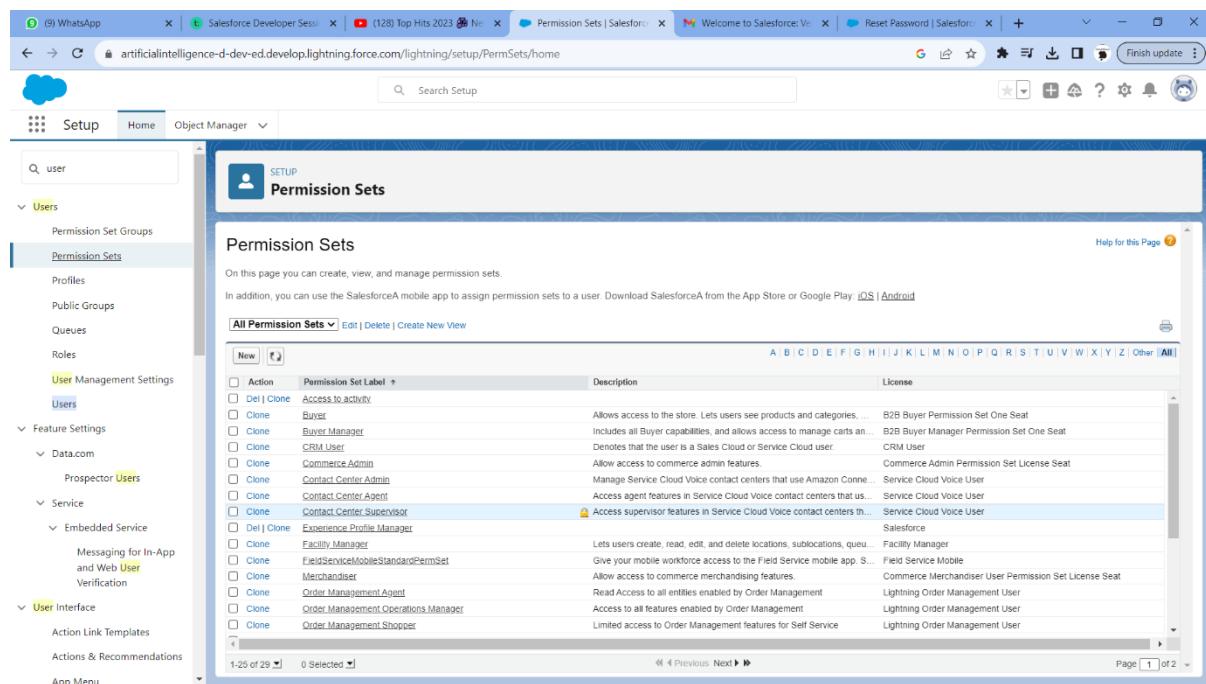
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

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 Setup interface with the following details:

- Page Title:** Permission Sets
- Section:** Permission Sets
- Sub-section:** All Permission Sets
- Table Headers:** Action, Permission Set Label, Description, License
- Table Data:** A list of permission sets including:
 - Access_to_Activity
 - Buyer
 - Buyer_Manager
 - CRM_User
 - Commerce_Admin
 - Contact_Center_Admin
 - Contact_Center_Agent
 - Contact_Center_Supervisor
 - Experience_Profile_Manager
 - Facility_Manager
 - FieldServiceMobileStandardPermSet
 - Merchandiser
 - Order_Management_Agent
 - Order_Management_Operations_Manager
 - Order_Management_Shopper
- Page Navigation:** Search bar, Help for this Page, New, Edit, Delete, Create New View, Alphabetical navigation (A-Z), Page 1 of 2.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' section selected. A sub-menu for 'Users' is open, showing options like 'User Management Settings' and 'Users'. The main window displays the 'Create' screen for a new permission set. The 'Enter permission set information' section includes fields for 'Label' (set to ' '), 'API Name' (set to ' '), and 'Description'. Below this, a note about session activation is present. The 'Select the type of users who will use this permission set' section contains a note about license assignment and a dropdown for 'License' which is set to 'None'. Buttons for 'Save' and 'Cancel' are at the bottom.

This screenshot is identical to the one above, but with different input values. In the 'Label' field, the word 'salesmanager' has been typed. The 'API Name' field also contains 'salesmanager'. All other elements, including the sub-menu, the form fields, and the notes, remain the same as in the first screenshot.

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

Left Sidebar:

- Search bar: Search Setup
- Setup icon
- Home
- Object Manager
- User Management Settings (selected)
- Users (selected)
- Feature Settings
 - Data.com
 - Prospector (Users)
- Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
- User Interface
 - Action Link Templates
 - Actions & Recommendations
 - App Menu

Right Panel - Permission Set Overview:

| Description | License | API Name | Namespace Prefix |
|-----------------------------|-----------------------------|--------------|------------------|
| Session Activation Required | | salesmanager | |
| Last Modified By | GOPAL_S_01/10/2023, 7:29 pm | | |

Right Panel - Apps:

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

Screenshot of the Salesforce Setup interface showing the 'Permission Sets' page for the 'salesmanager' permission set, with the 'Object Settings' tab selected.

Left Sidebar:

- Search bar: Search Setup
- Setup icon
- Home
- Object Manager
- User Management Settings (selected)
- Users (selected)
- Feature Settings
 - Data.com
 - Prospector (Users)
- Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
- User Interface
 - Action Link Templates
 - Actions & Recommendations
 - App Menu

Right Panel - Object Settings:

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

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

The left sidebar shows the navigation path: Setup > Users > Permission Sets. The 'salesmanager' permission set is selected.

The main content area displays the 'Object Permissions' section for the 'Bank' object. Under 'Object Permissions', the 'Enabled' column is checked for 'Read', 'Edit', and 'View All'. Under 'Field Permissions', 'Read Access' is checked for 'Bank Name' and 'Last Modified By', while 'Edit Access' is checked for 'Created By'.

URL: <https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%3Fs%3DEntityPermissions%26o%3D...>

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

The left sidebar shows the navigation path: Setup > Users > Permission Sets. The 'salesmanager' permission set is selected.

The main content area displays the 'Object Permissions' section for the 'Bank' object. Under 'Object Permissions', the 'Enabled' column is checked for 'Read', 'Edit', and 'View All'. Under 'Field Permissions', 'Read Access' is checked for 'Bank Name' and 'Last Modified By', while 'Edit Access' is checked for 'Created By'.

URL: <https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%2Fe%3Fs%3DEntityPermissions%26o%3D...>

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

Setup Home Object Manager

User salesmanager

Current Assignments

No assignments defined.

Search Setup

Setup Home Object Manager

User salesmanager

Current Assignments

No assignments defined.

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

Setup Home Object Manager

Select Users to Assign

All Users

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

Cancel Next

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/permSets/0PS5j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

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

Selected Users

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

Cancel Back Assign

The screenshot shows the 'Select an Expiration Option For Assigned Users' dialog in the Salesforce Setup interface. It allows users to choose whether to assign a permission set with or without an expiration date. If no expiration date is chosen, it can be customized. A table lists the selected user, their profile, and license. The user 'madhu b' is assigned to the 'salesmanager' profile and the 'Salesforce Platform' license, with the status 'Never Expires'.

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYrOijzXR1cf9wbGF0Zm9ybV9wZXltczpwc2FSZXN1bHRQYWdliw...

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

The screenshot shows the 'Assignment Summary' page after the permission set has been assigned. It displays a table with one row for the user 'madhu b', showing they are assigned to the 'Salesforce Platform' license. The status is marked as 'Success'. A green banner at the top indicates '1 assignments were successful.'

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

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...

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

LIST VIEW CONTROLS

New

- Clone
- Rename
- Sharing Settings
- Show List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

javascript:void(0)

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:

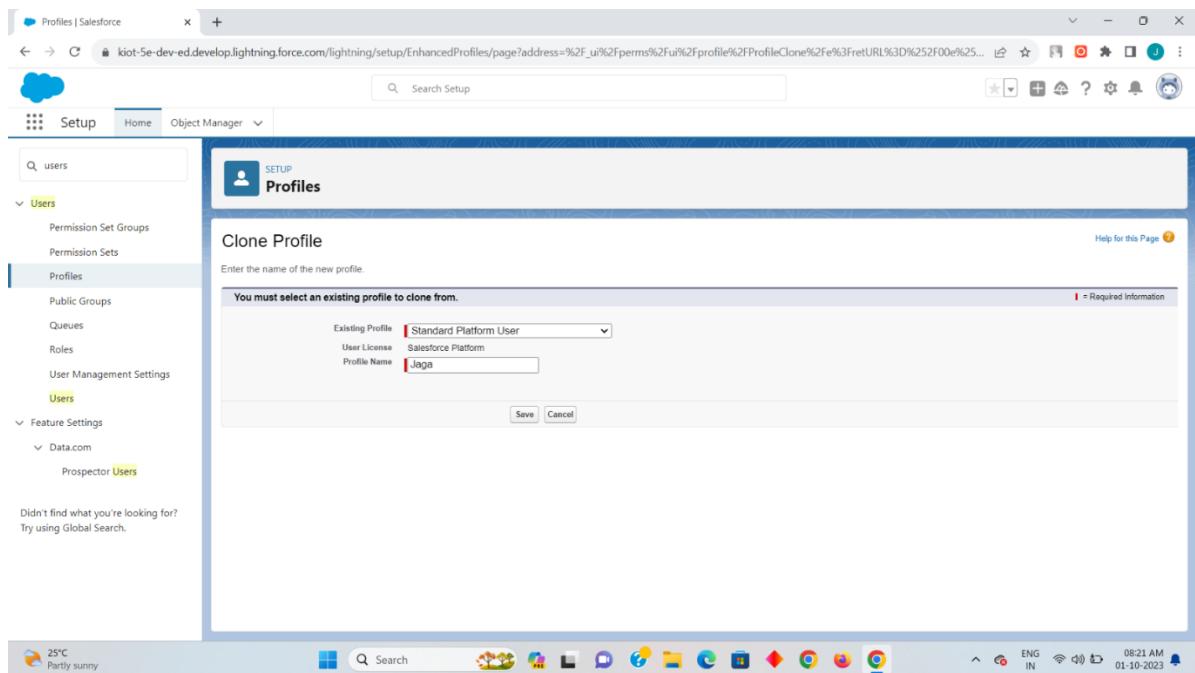
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar includes sections for Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, Users (selected), Feature Settings, and Data.com. A note at the bottom says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Profiles" and shows a table of existing profiles. The columns are "Action", "Profile Name", "User License", and "Custom". The "User License" column contains various license types like Analytics Cloud Integration User, Authenticated Website, Chatter External, Chatter Free, 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, and Customer Community Plus. The "Custom" column indicates which profiles are custom-built, with several checked off. Navigation buttons at the bottom include "Page 1 of 2".

Step 2:

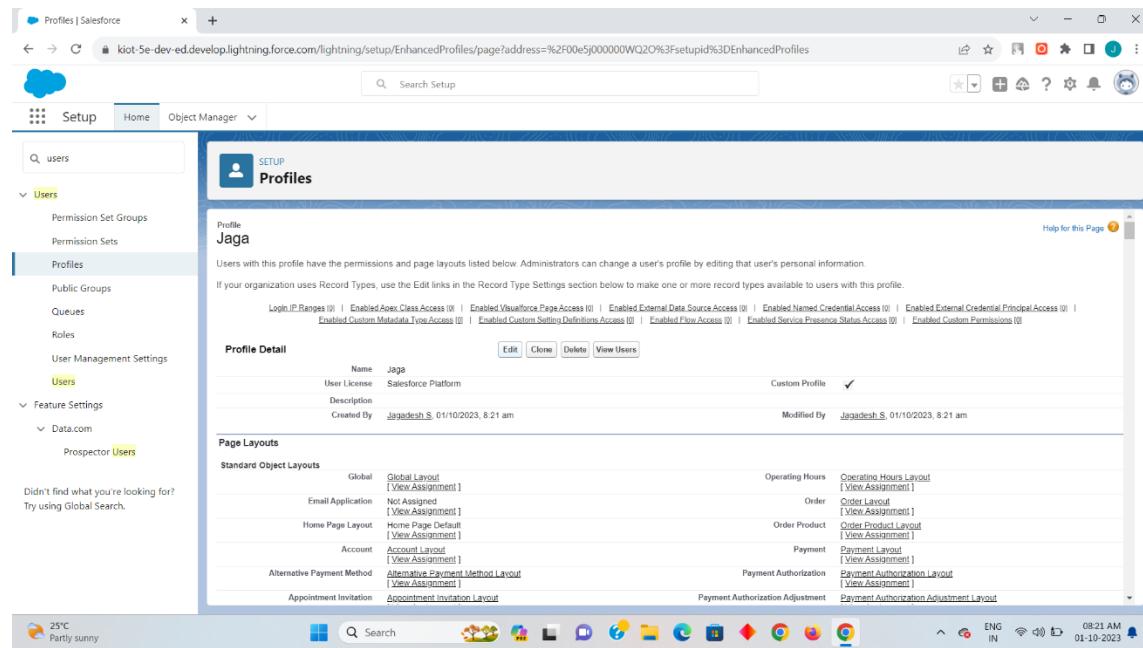
Click on the new to create a new profile along with the label and Api



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%3Fr?url%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 Subscription Consent Types

| | Communication Subscription Consents | Communication Subscription Timings | Contacts | Contact Point Addresses | Contact Point Consents | Contact Point Emails | Locations | Party Consents | Push Topics | Sellers | Streaming Channels | User External Credentials |
|--------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------------------|
| Basic Access | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Create | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Delete | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| View All | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Modify All | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Custom Object Permissions

| | Providers | Resources |
|--------------|--|--|
| Basic Access | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Create | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Edit | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Delete | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| View All | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Modify All | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

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

Search

ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3Fr?url%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 Subscription Consent Types

| | Communication Subscription Consents | Communication Subscription Timings | Contacts | Contact Point Addresses | Contact Point Consents | Contact Point Emails | Locations | Party Consents | Push Topics | Sellers | Streaming Channels | User External Credentials |
|--------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------------------|
| Basic Access | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Create | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Delete | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| View All | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Modify All | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Custom Object Permissions

| | Providers | Resources |
|--------------|--|--|
| Basic Access | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |
| Create | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |
| Delete | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |
| View All | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |
| Modify All | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

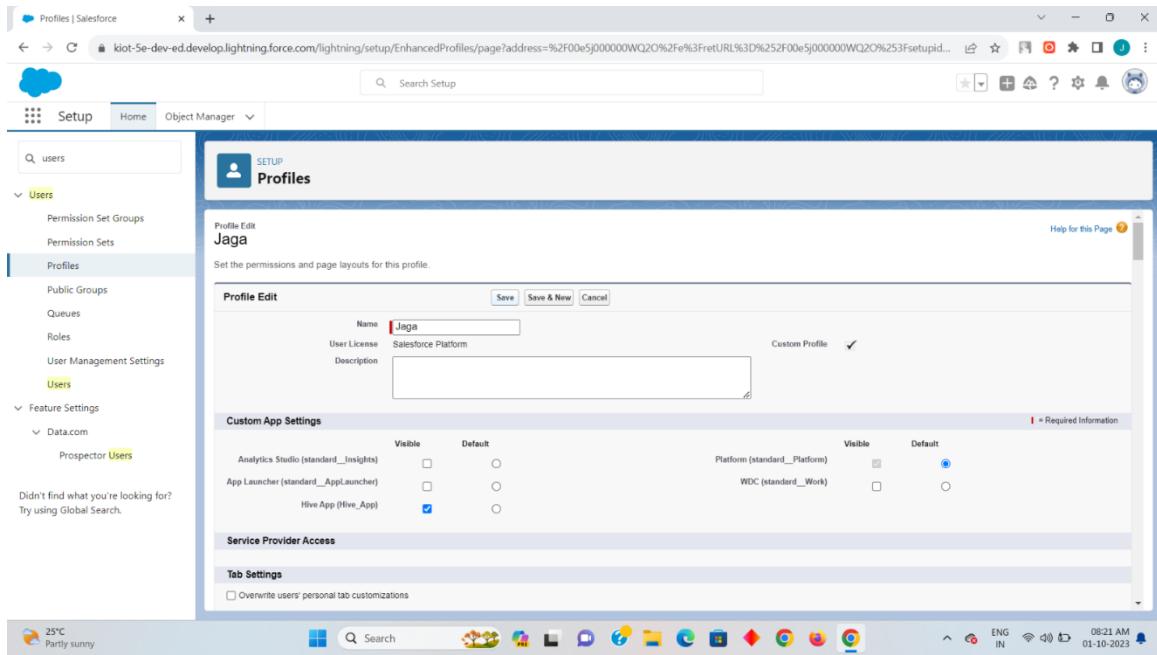
Enable different Experience Cloud login policies for employees.

- 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

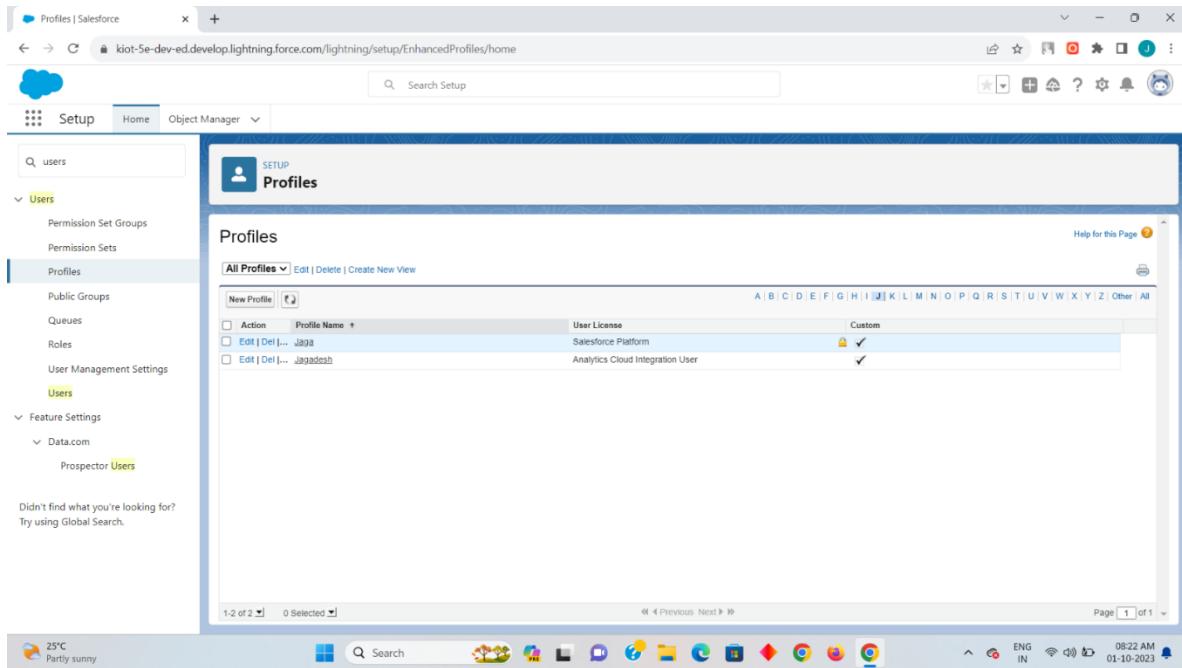
Search

ENG IN 08:21 AM 01-10-2023



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 been created with alternate name but with the same user profile and once the two user are create click on save.

| Action | Full Name | Alias | Username | Role | Active | Profile |
|---|------------------|---------|--|--------------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> Edit | Chatter Expert | Chatter | chatty@00d500000c0joseaf.6z@bkrkd4i@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> Edit | Grey Jane | jgrey | jane_gray.vgnimmoalm.cz7d2kogt3@gmail.com | | <input checked="" type="checkbox"/> | Customer Community User |
| <input type="checkbox"/> Edit | S_Jaga | JS | jaga096@gmail.com | CEO | <input type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> Edit | S_Jagadesh | JS | w0w@gmail.com | SF Admin | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> Edit | S_Jagadesh | JS | jaga117@gmail.com | Channel Sales Team | <input type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> Edit | User_Integration | Integ | integration@00d500000c0joseaf.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User_Secuthy | sec | insightssecurity@00d500000c0joseaf.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |

New User

User Edit

General Information

| | |
|------------|------------------------|
| First Name | Jagadesh11 |
| Last Name | S |
| Alias | S |
| Email | jwr123@gmail.com |
| Username | jwr123@gmail.com |
| Nickname | User169612875144962592 |
| Title | |
| Company | |
| Department | |
| Division | |

Role: Director, Channel Sales
User License: Salesforce Platform
Profile: Standard Platform User
Marketing User:

New User

User Edit

General Information

| | |
|------------|------------------------|
| First Name | Jagadesh22 |
| Last Name | S |
| Alias | S |
| Email | jaat1@gmail.com |
| Username | jaat1@gmail.com |
| Nickname | User169612879963616745 |
| Title | |
| Company | |
| Department | |
| Division | |

Role: Marketing Team
User License: Salesforce Platform
Profile: Standard Platform User
Marketing User:

All Users

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

| Action | Full Name | Alias | Username | Role | Active | Profile |
|-------------------------------------|-------------|-------|-------------------|-------------------------|-------------------------------------|------------------------|
| <input type="checkbox"/> | S | S | jas96@gmail.com | CEO | <input type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> | Jagadeesh11 | S | jaat1@gmail.com | SE Admin | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | Jagadeesh22 | S | jaat117@gmail.com | Channel Sales Team | <input type="checkbox"/> | Standard Platform User |
| <input checked="" type="checkbox"/> | Jagadeesh11 | S | jwr123@gmail.com | Director, Channel Sales | <input checked="" type="checkbox"/> | Jaga |
| <input checked="" type="checkbox"/> | Jagadeesh22 | S | jaat1@gmail.com | Marketing Team | <input checked="" type="checkbox"/> | Jaat |

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

kot-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

Data.com

Prospector Users

Permission Sets

Permission Sets

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

In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download 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 orders. | 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 | Allow access to commerce admin features. | CRM User |
| <input type="checkbox"/> | Commerce Admin | Manage Service Cloud Voice contact centers that use Amazon Connect. | Commerce Admin Permission Set License Seat |
| <input type="checkbox"/> | Contact Center Admin | Access agent features in Service Cloud Voice contact centers that use Amazon Connect. | Service Cloud Voice User |
| <input type="checkbox"/> | Contact Center Agent | Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect. | Service Cloud Voice User |
| <input type="checkbox"/> | Contact Center Supervisor | Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect. | Service Cloud Voice User |
| <input type="checkbox"/> | Deli Clone | Experience Profile Manager | Salesforce |
| <input type="checkbox"/> | Facility Manager | Lets users create, read, edit, and delete locations, publications, queues, and more. | Facility Manager |
| <input type="checkbox"/> | Field Service Mobile Standard Permissions | Give your mobile workforce access to the Field Service mobile app. Standard permissions include basic location, calendar, and navigation. | Field Service Mobile |
| <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://kot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/home

25°C Partly sunny

Search

ENG IN 06:24 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data.com

Prospector Users

Permission Sets

Permission Set 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:

Save Cancel

25°C Partly sunny

Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgt%3FsfdclFrameOrigin%3Dhttps%253A%252F%252Fkot-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

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

25°C Partly sunny

Video Tutorial | Help for this Page

API Name permission12
Namespace Prefix
Created By Jagadeesh_S 01/10/2023, 8:24 am

Permission Set Overview

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

Apps

Assigned Apps
Assigned Connected Apps
Select Settings
App Permissions
Apex Class Access
Visualforce Page Access
External Data Source Access

08:24 AM 01-10-2023 ENG IN

Permission Sets | Salesforce

kot-5e-dev-ed.develop.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

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

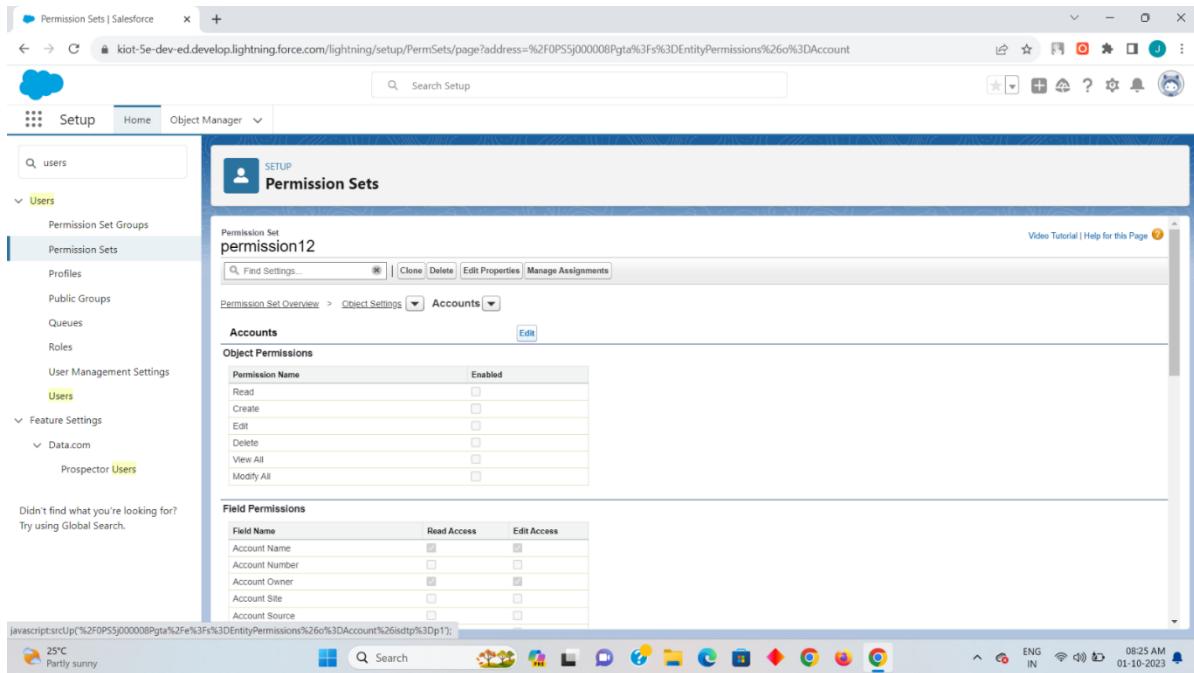
25°C Partly sunny

Video Tutorial | Help for this Page

Object Settings

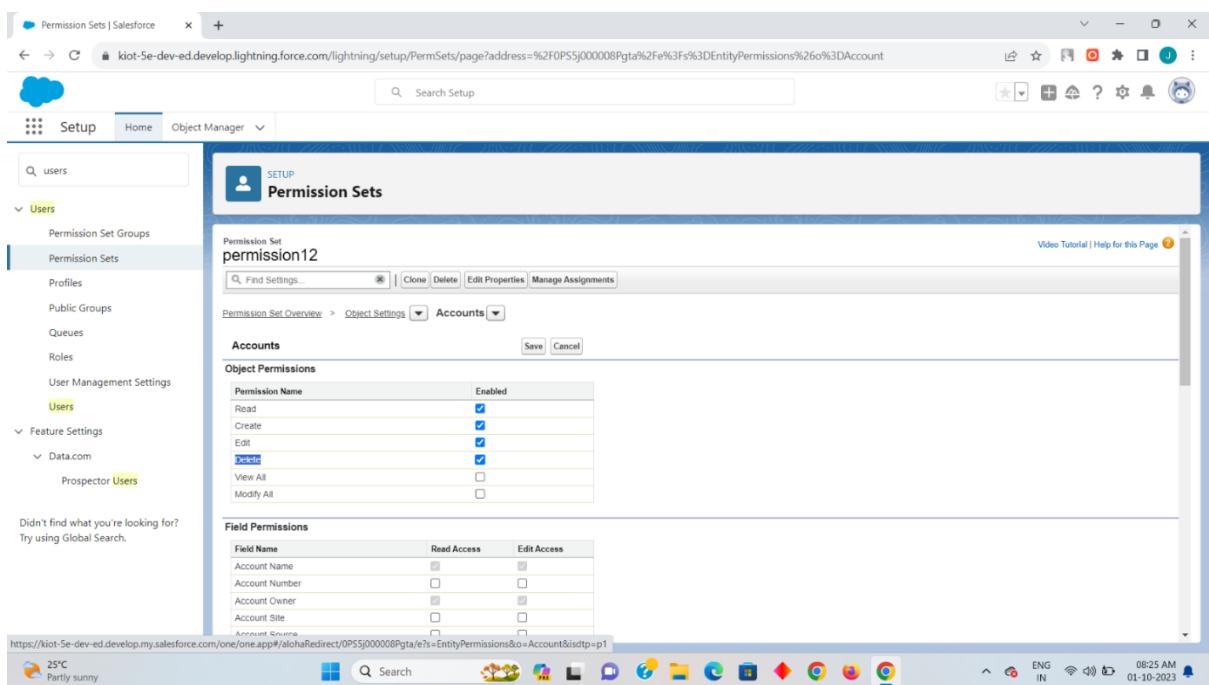
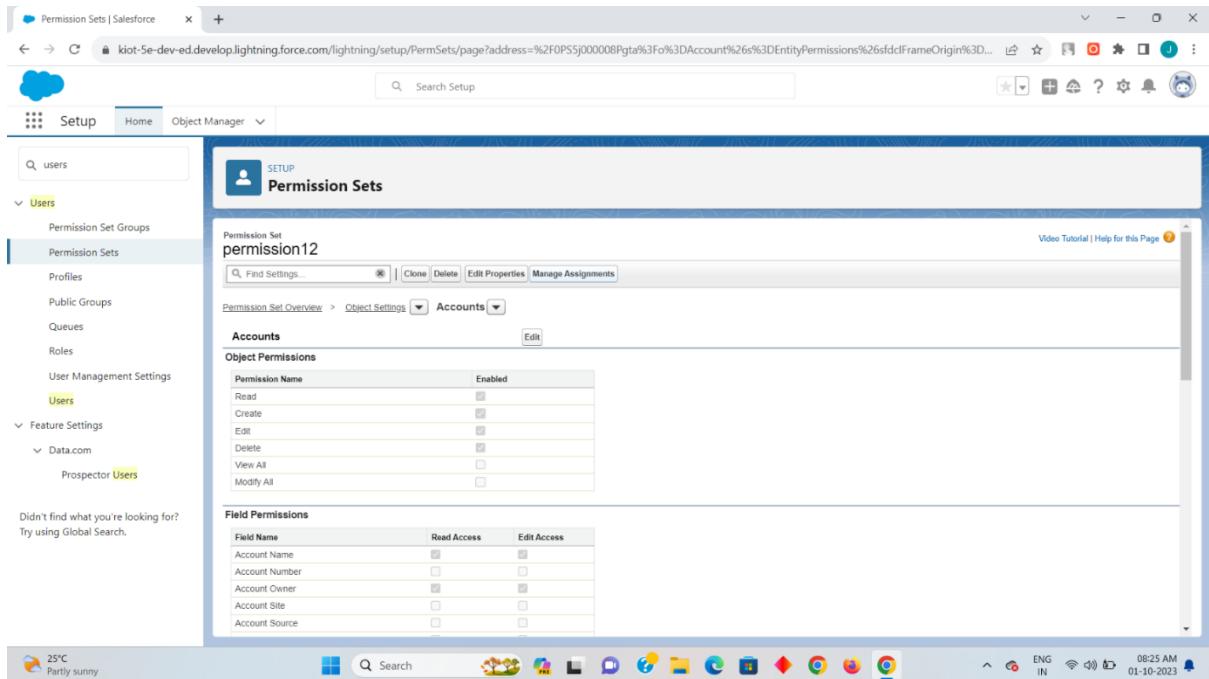
| Object Name | Object Permissions | Total Fields | Tab Settings |
|---------------------------------|--------------------|--------------|--------------|
| Account Brands | No Access | 9 | -- |
| Accounts | No Access | 44 | -- |
| AI Insight Reasons | No Access | -- | -- |
| AI Record Insights | No Access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

08:25 AM 01-10-2023 ENG IN



Step 7:

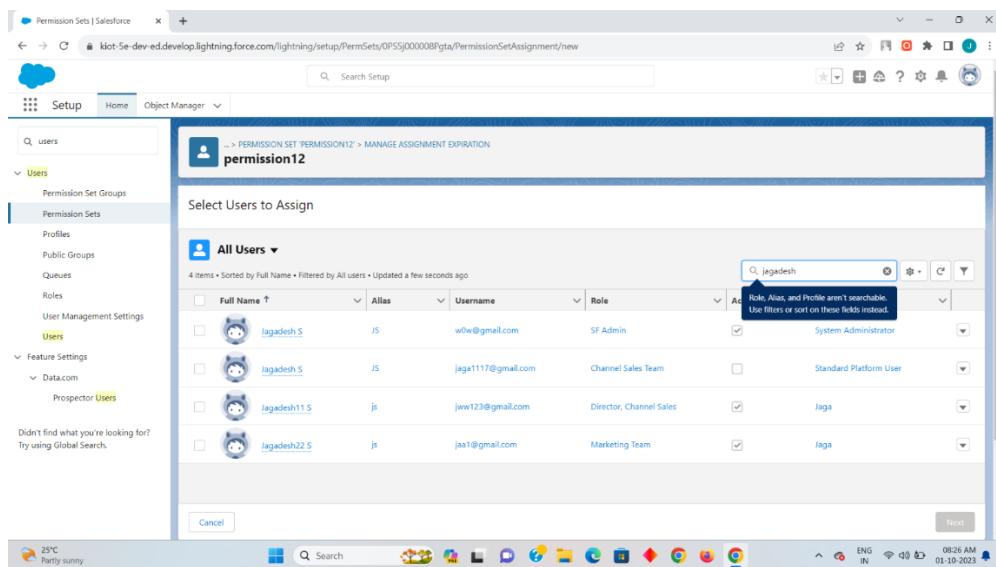
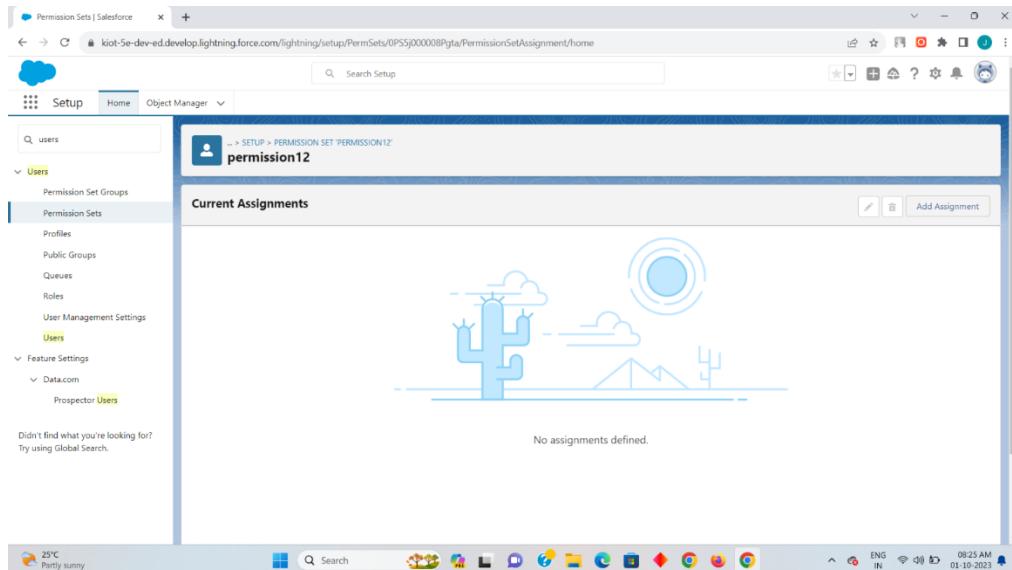
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.



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.

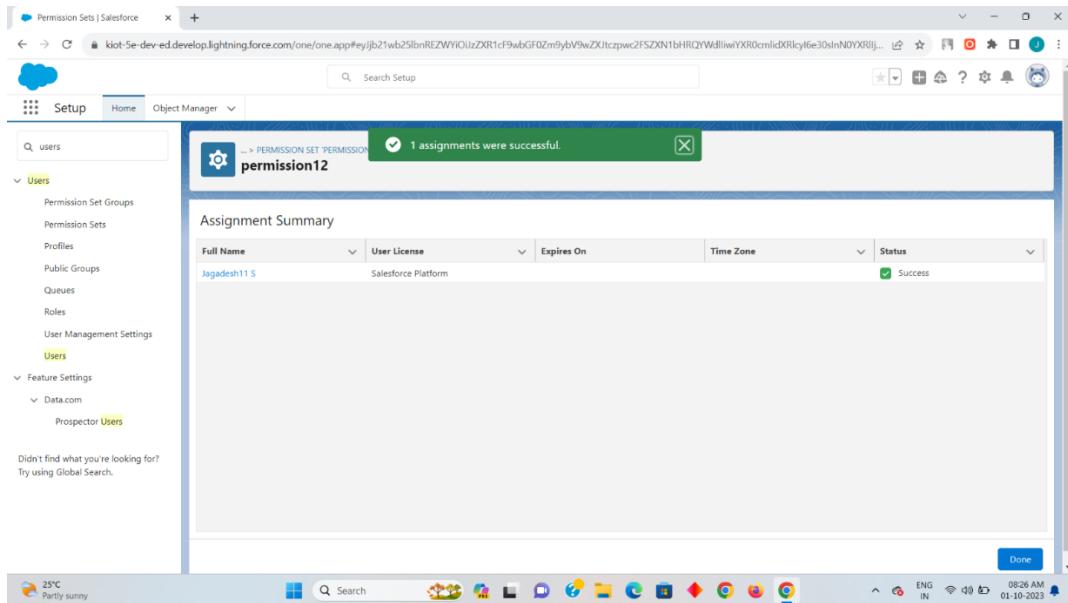


The screenshot shows the Salesforce Setup interface for managing permission set assignments. The left sidebar is collapsed, and the main area displays a list of users under the 'Users' section. A specific user, 'Jagadesh11 S', is highlighted with a checkmark in the 'Selected' column. The interface includes a search bar at the top and a 'Next' button at the bottom right.

Click on next.

The screenshot shows the continuation of the permission set assignment process. The user 'Jagadesh11 S' is listed in the 'Selected Users' table. The 'Expires On' column shows 'Never Expires'. The 'Assign' button is visible at the bottom right of the screen.

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.

The screenshot shows the Salesforce Email Template page for a template named "Thank You Email - Survey".

Details Tab:

- Email Template Name: Thank You Email - Survey
- Description: Made in Email Template Builder
- Related Entity Type: Survey Result
- Folder: Public Email Templates

Message Content Tab:

- Subject: Thank You For Completing Our Survey!
- HTML Value:

```
Hi {{Survey_Result__c.Name__c}},  
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
```

Additional Information:

- Created By: Rakesh Gupta, 12/21/2020, 4:23 PM
- Last Modified By: 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
Survey - Thank You Email

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

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: User

Recipients:

| Available Recipients | Selected Recipients |
|---|---------------------|
| User: Integration User User: Rakesh Gupta User: Security User | Email Field: Email |

Add Remove

You can enter up to five (5) email addresses to be notified.

Additional Emails:

From Email Address: Current User's email address

Make this address the default From email address for this object's email alerts.

Save | Save & New | Cancel

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"/> A_a Comment X |
| Email__c | <input type="text"/> A_a Email > Value X |
| Name__c | <input type="text"/> (!Name.firstName) {!Name.lastName} |
| Rating__c | <input type="text"/> A_a Rating X |
| + Add Field | |
| <input type="checkbox"/> Manually assign variables | |

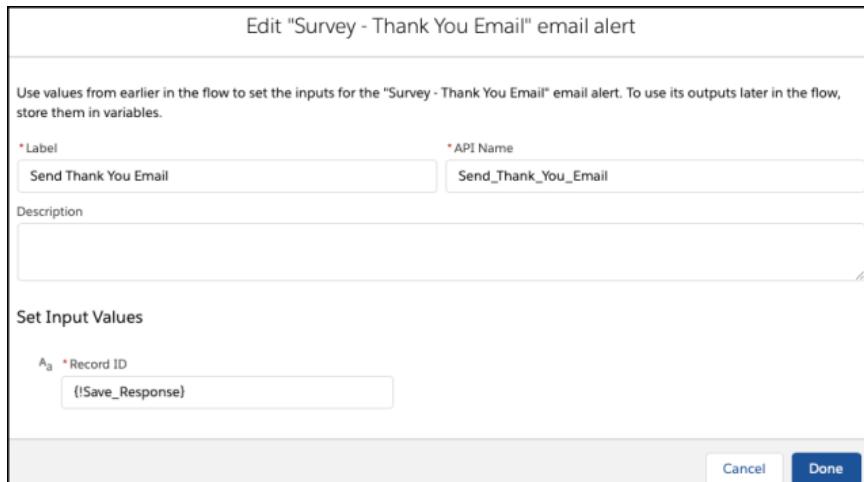
[Cancel](#) [Done](#)

Step 4.3: Salesforce Flow – Call an Action – Email Alert to Send Out Thank You Email

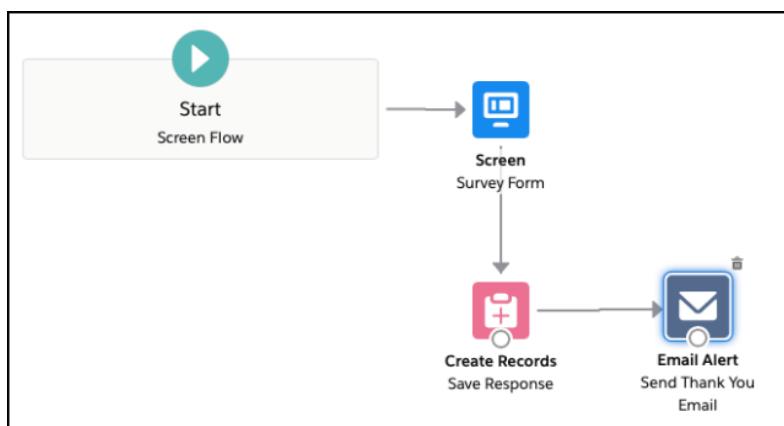
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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.**



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: Survey

* Flow API Name: Survey

Description:

Hide Advanced

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

* Type: Screen Flow

* API Version for Running the Flow: 51

Interview Label: Survey {\$Flow.CurrentDateTime}

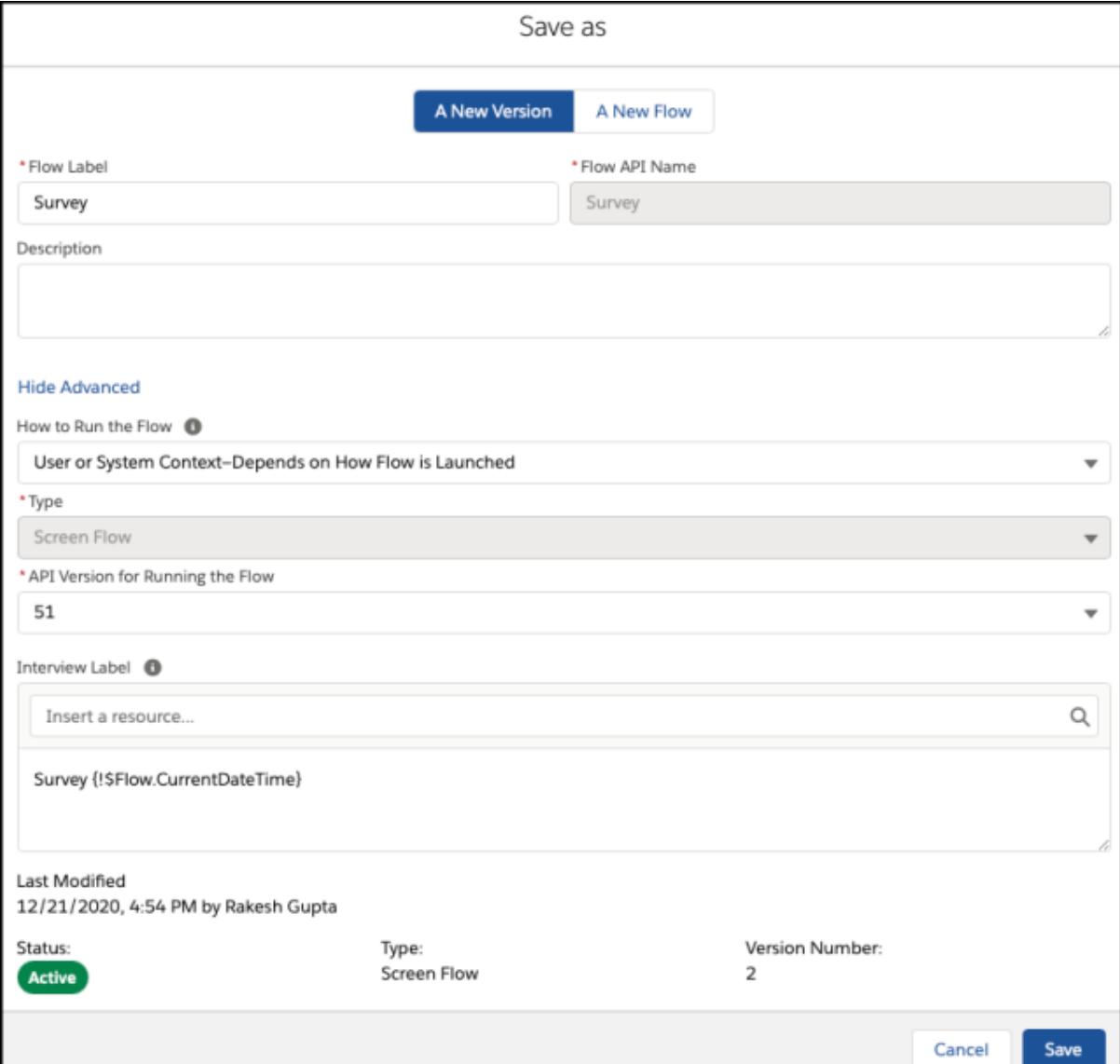
Last Modified: 12/21/2020, 4:54 PM by Rakesh Gupta

Status: [Active](#)

Type: Screen Flow

Version Number: 2

[Cancel](#) [Save](#)

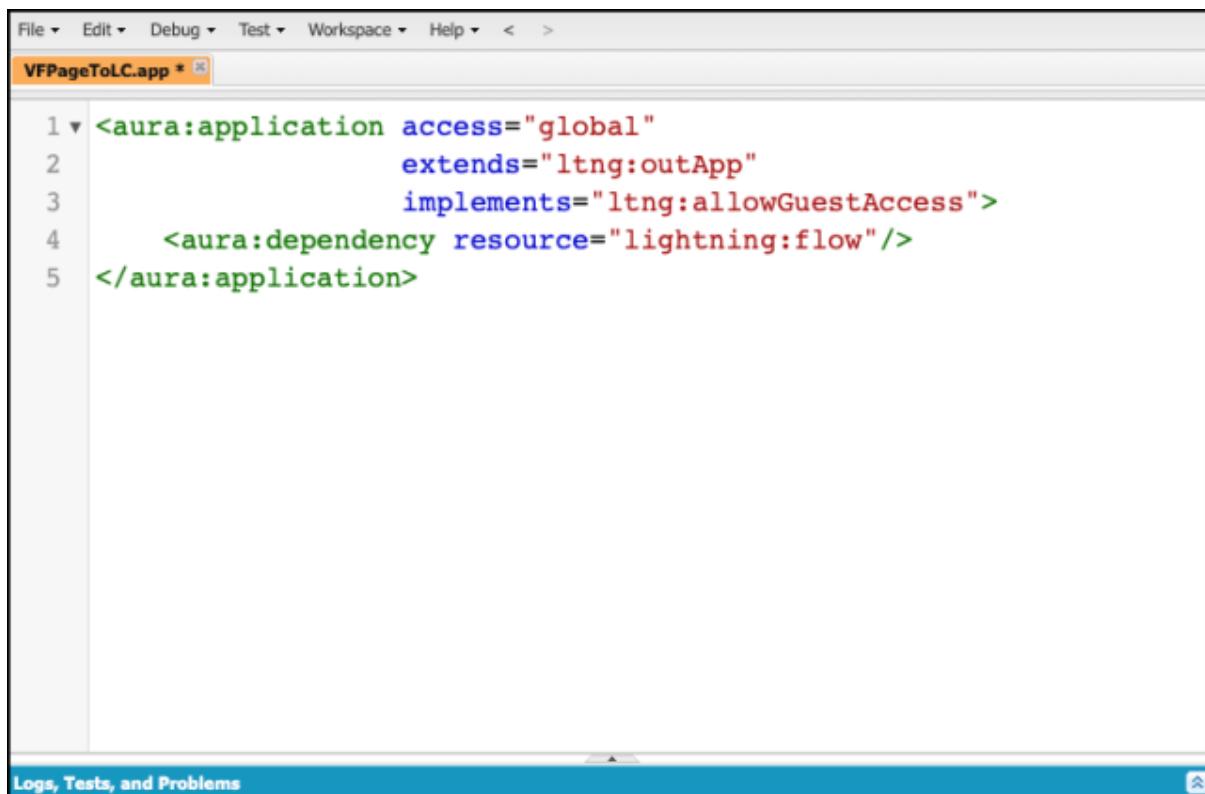


Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a

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 (VFPageToLC)** 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 with the following details:

- Toolbar:** File, Edit, Debug, Test, Workspace, Help.
- Code Editor:** The file is named "VFPageToLC.app". The code is as follows:

```
1 <aura:application access="global"
2         extends="ltng:outApp"
3         implements="ltng:allowGuestAccess">
4             <aura:dependency resource="lightning:flow"/>
5         </aura:application>
```
- Status Bar:** Logs, Tests, and Problems.

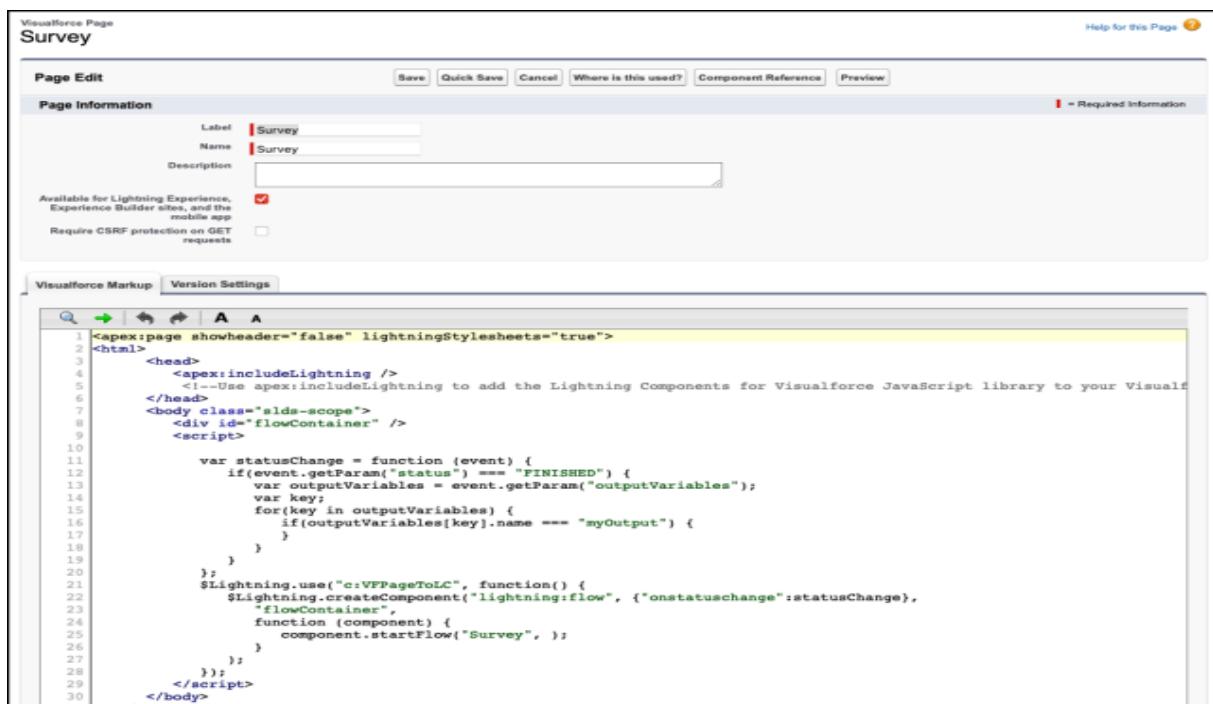
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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 Visualforce Page Editor for a page named "Survey". The "Page Information" section includes fields for Label (Survey), Name (Survey), and Description. It also has checkboxes for "Available for Lightning Experience, Experience Builder, and the mobile app" (checked) and "Require CSRF protection on GET requests" (unchecked). The "Visualforce Markup" tab is selected, showing the following Apex code:

```
<apex:page showheader="false" lightningStylesheets="true">
<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") {
                ...
            }
        }
    }
};
$cVFPageToLC", 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.**

The screenshot shows the 'Site Edit' page in the Salesforce interface. The page has a header with 'Site Edit' and buttons for 'Save' and 'Cancel'. It contains several input fields and dropdown menus for configuring a site. Key settings visible include:

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

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!    

 Survey Site Guest User via b9amq6fe7r.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