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Assignment No 1

Name :

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

Solution:

Step 1: Create Custom Objects

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

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

- Header:** Search Setup, Home, Object Manager.
- Section:** SETUP / New Custom Object.
- Custom Object Definition Edit:**
 - Custom Object Information:** Label: college, Plural Label: colleges, Example: Account, Suffix with vowel sound:
 - Object Name:** Object Name: college, Example: Account.
 - Description:** A large text area for description.
 - Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (selected) or Open a window using a visualforce page.
 - Content Name:** None.
- Enter Record Name Label and Format:** Record Name: college Name, Example: Account Name, Data Type: Text.
- Optional Features:** Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, Enable Licensing (unchecked).
- Object Classification:** Allow Sharing (checked), Allow Bulk API Access (checked), Allow Streaming API Access (checked).
- Deployment Status:** In Development (radio button) is selected.
- Search Status:** Allow Search (checkbox) is unchecked.
- Object Creation Options (Available only when custom object is first created):** Add Notes and Attachments related list to default page layout (checkbox) is unchecked, Launch New Custom Tab Wizard after saving this custom object (checkbox) is unchecked.

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

Setup | Home | Object Manager

Object Manager

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	department	Example:	Account
Plural Label	departments	Example:	Accounts
Sounds with vowel sound	<input type="checkbox"/>		

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

Object Name	department	Example:	Account
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Description:

Context-Sensitive Help Setting

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

Content Name

Record Name: Department Name Example: Account Name

Data Type: Text

Optional Features

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

Object Classification

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

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

Deployment Status

In Development Deployed

Search Status

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

Allow Search

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

Add Notes and Attachments related list to default page layout

Launch New Custom Tab Wizard after saving this custom object

Save | Save & New | Cancel

Step 2: Create a Master-Detail Relationship

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

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

CDepartment

Details	
Fields & Relationships	Description
Page Layouts	API Name CDepartment_c
Lightning Record Pages	Custom
Buttons, Links, and Actions	✓
Compact Layouts	Singular Label CDepartment
Field Sets	Plural Label CDepartments
Object Limits	Deployment Status Deployed
Record Types	Help Settings Standard salesforce.com Help Window
Related Lookup Filters	
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	

CDepartment

New Relationship

Step 3 of 6

Field Label	college
Field Name	college
Description	
Help Text	
Child Relationship Name	CDepartments
Sharing Setting	<input checked="" type="radio"/> Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records. <input type="radio"/> ReadWrite: Allows users with at least ReadWrite access to the Master record to create, edit, or delete related Detail records.
Allow reparenting	<input type="checkbox"/> Child records can be reparented to other parent records after they are created.
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity

The screenshot shows the Salesforce Setup interface under the Object Manager tab. A new relationship is being created between the CDepartment object and the College object. The 'Related To' field is set to 'College'. The process is at Step 2 of 6.

The screenshot shows the Salesforce Setup interface under the Object Manager tab. A new custom field is being created on the CDepartment object. The 'Data Type' is set to 'Roll-Up Summary'. The process is at Step 1 of 6.

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 Home Object Manager

CDepartment

Fields & Relationships		4 Items, Sorted by Field Label			
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	college	college_c	Master-Detail(college)		<input checked="" type="checkbox"/>
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Department Name	Name	Text(80)		<input checked="" type="checkbox"/>
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets					
Object Limits					
Record Types					
Related Lookup Filters					
Restriction Rules					
Scoping Rules					
Triggers					
Flow Triggers					
Validation Rules					

Setup Home Object Manager

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.

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

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

Setup Home Object Manager

college

New Custom Field

Step 5. Add to page layouts Step 5 of 5

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

college

SETUP > OBJECT MANAGER

New Custom Field

Step 4 of 5

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

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

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

college

SETUP > OBJECT MANAGER

New Custom Field

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

college

SETUP > OBJECT MANAGER

New Custom Field

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

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
college

Details

Fields & Relationships

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

college New Custom Field

Step 1. Choose the field type Step 1

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

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

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

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

Boolean Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

URL Allows users to select a True (checked) or False (unchecked) value.

Help for this Page ?

Next Cancel

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
college

Details

Fields & Relationships 4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(50)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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.**

New Custom Object Tab

Step 2. Add to Profiles 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.

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

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 with the following details:

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Left Sidebar:** Shows a tree structure under "User Interface" with "Tabs" selected. Other options like "Rename Tabs and Labels" are also visible.
- Page Title:** "SETUP Tabs".
- Section Header:** "Step 3. Add to Custom Apps".
- Text:** "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."
- Table:** A grid listing "Custom App" names and "Include Tab" checkboxes. Most checkboxes are checked (indicated by a blue checkmark).

Custom App	Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
Bot Solutions (standard__LightningBot)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>
- Checkboxes:** "Append tab to users' existing personal customizations" (checked) and "Previous" / "Save" / "Cancel" buttons at the bottom.

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details

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: CDOPARTMENT

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

Setup Home Object Manager

App

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

APP MANAGER

AppExchange Marketplace

Connected Apps (Alpha Usage)

Manage Connected App

Lightning Rail

How Category

Lightning Rail Solutions

Module Apps

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Multicurrency

Salesforce Offline

Salesforce Settings

Packaging

Installed Packages

SETUP Lightning Experience App Manager

App Name: All Tabs

Developer Name: AllTabAnd

Description: Build CRM Analytics dashboards and apps

Last Modified Date: 14/07/2020, 10:47 am

Type: Classic

App Name: Analytics Studio

Developer Name: Insights

Description: Build CRM Analytics dashboards and apps

Last Modified Date: 14/07/2020, 10:47 am

Type: Classic

App Name: App Launcher

Developer Name: App Launcher

Description: App launcher links

Last Modified Date: 14/07/2020, 10:47 am

Type: Classic

App Name: Bull Solutions

Developer Name: LightningBull

Description: Discover and manage business solutions designed for your industry.

Last Modified Date: 14/07/2020, 10:47 am

Type: Lightning

App Name: Community

Developer Name: Community

Description: Salesforce CRM Communities

Last Modified Date: 14/07/2020, 10:47 am

Type: Classic

App Name: Content

Developer Name: Content

Description: Salesforce Content Management

Last Modified Date: 14/07/2020, 10:47 am

Type: Classic

App Name: Data Manager

Developer Name: DataManager

Description: Use Data Manager to view limits, monitor usage, and manage recipes.

Last Modified Date: 14/07/2020, 10:47 am

Type: Lightning

App Name: Digital Experiences

Developer Name: SalesforceDX

Description: Manage content and media for all of your sites.

Last Modified Date: 14/07/2020, 10:47 am

Type: Lightning

App Name: Lightning Experience App

Developer Name: LightningExperience

Description: View applications and manage features for Lightning Experience

Last Modified Date: 14/07/2020, 10:47 am

Type: Lightning

App Name: Marketing

Developer Name: Marketing

Description: Built-in-class on-demand marketing automation

Last Modified Date: 14/07/2020, 10:47 am

Type: Classic

App Name: Platform

Developer Name: Platform

Description: The fundamental Lightning Platform

Last Modified Date: 14/07/2020, 10:47 am

Type: Classic

App Name: Queue Management

Developer Name: QueueManagement

Description: Create and manage queues for your business

Last Modified Date: 14/07/2020, 10:47 am

Type: Lightning

App Name: Sales

Developer Name: Sales

Description: The world's most popular sales force automation (SFA) solution

Last Modified Date: 14/07/2020, 10:47 am

Type: Classic

App Name: Sales

Developer Name: LightningSales

Description: Manage your sales process with accounts, leads, opportunities, and more

Last Modified Date: 14/07/2020, 10:47 am

Type: Lightning

App Name: Sales Console

Developer Name: LightningSalesConsole

Description: (Lightning Experience) Let sales reps work with multiple records on one screen

Last Modified Date: 14/07/2020, 10:47 am

Type: Lightning

App Name: Salesforce Chat

Developer Name: Shutter

Description: The Salesforce Chatbot assistant, including voice and text

Last Modified Date: 14/07/2020, 10:47 am

Type: Classic

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.

This screenshot shows a web interface for managing colleges. At the top, there is a navigation bar with links for 'My college', 'colleges', 'CDepartments', 'student', and 'Content'. A search bar is located at the top right. Below the navigation, a sidebar displays 'Recently Viewed' items, which are currently empty. The main content area has a heading 'You haven't viewed any colleges recently. Try switching list views.' There are several toolbar icons at the top right of the main content area.

This screenshot shows a 'New college' form overlaid on the previous interface. The form is titled 'New college' and includes a section for 'Information'. It contains fields for 'college Name' (set to 'kiot'), 'phone' (set to '9087116402'), 'Email' (set to 'kiot@ac.in'), and 'Location' with 'Latitude' (set to '90') and 'Longitude' (set to '80'). A note indicates that the 'college Name' field is required. The form has three buttons at the bottom: 'Cancel', 'Save & New', and 'Save'. The background shows the same 'Recently Viewed' list and toolbar as the previous screenshot.

My college colleges CDDepts student Content

CDDepts Recently Viewed

1 item • Updated a few seconds ago

Department Name

cse

To unpin, pin another list view

New CDDepts

Information

*Department Name
Information technology

*college
kiot

email
it@gmail.com

phone
887577568

hod name
arul

about

Cancel Save & New Save

My college colleges CDDepts student Content

CDDepartment Information technology

New Contact Edit New Opportunity

Related	Details
Department Name information technology	
college kiot	
email it@gmail.com	
phone 897577568	
hod name arul	
about	
Created By krishna s. 01/10/2023, 11:19 am	Last Modified By krishna s. 01/10/2023, 11:19 am

History

My college colleges CDDepts student Content

college kiot

New Contact Edit New Opportunity

Related	Details
college Name kiot	Owner krishna s.
Total count 1	
phone 9087116402	
Email kiot@gmail.com	
Location 90.80	
Created By krishna s. 01/10/2023, 11:16 am	Last Modified By krishna s. 01/10/2023, 11:17 am

History

My college colleges CDDepts student Content

CDDepts Recently Viewed

1 item • Updated a few seconds ago

<input type="checkbox"/> Department Name
1 <input type="checkbox"/> cse

New Import

My college colleges CDepartments student Content

Recently Viewed ▾ +

1 item • Updated a few seconds ago

	college Name
1	kiot

New Import Change Owner

History

Search...

My college colleges CDepartments student Content

college kiot

New Contact Edit New Opportunity

Related Details

college Name	kiot
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.

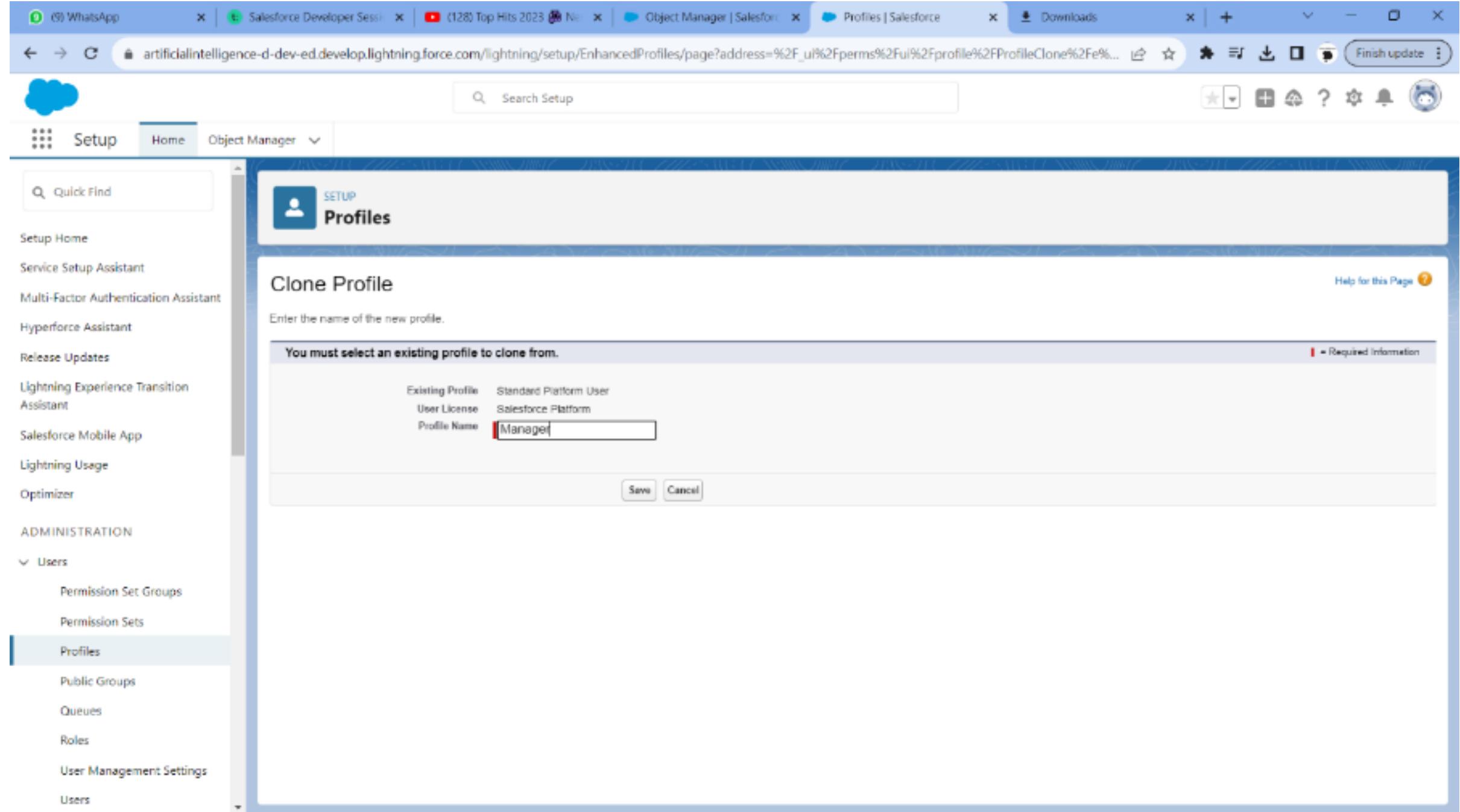
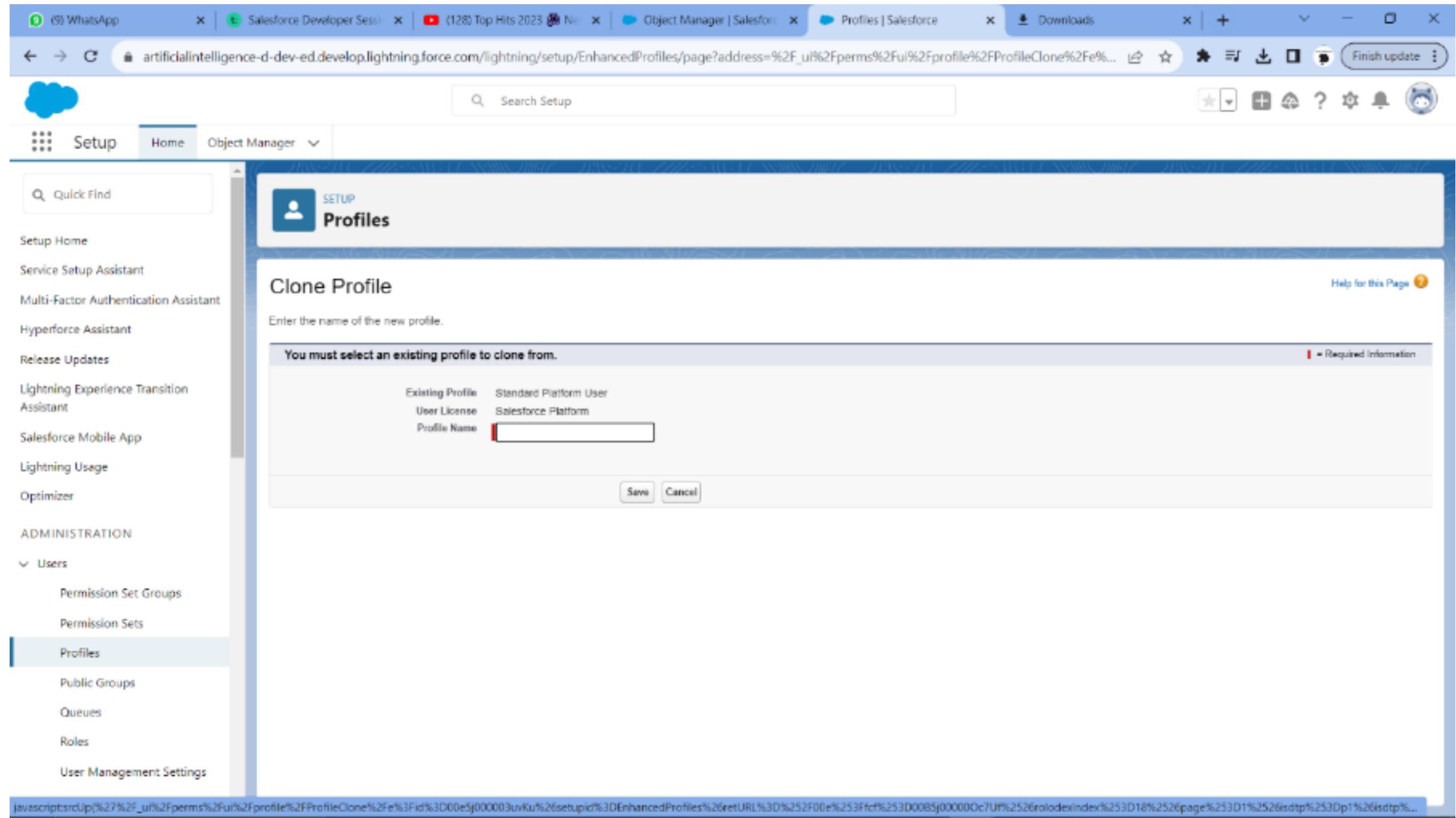
The image contains two screenshots of the Salesforce Setup Profiles page, demonstrating the creation of two custom profiles: Chatter External and Salesforce API Only System Integrations.

Screenshot 1 (Top): This screenshot shows the 'Profiles' page with the 'Chatter External' profile selected. The 'Custom' checkbox is checked under the 'User License' column for this profile. Other profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Chatter External (selected), Chatter Free, Chatter Free, Contract Manager, XOrg Proxy User, Customer Community Login, Customer Community Plus Login, Customer Community Plus User, Customer Community User, Customer Portal Manager Custom, and several Salesforce and System Admin profiles.

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Chatter External	Chatter External	<input checked="" type="checkbox"/>
Edit Clone	Chatter Free	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Free	Chatter Free	<input type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	XOrg Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del ...	Customer Marketing Profile	Customer	<input checked="" type="checkbox"/>
Edit Del ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
Edit Clone	Customer Community User	Customer Community	<input type="checkbox"/>
Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
1-25 of 41 0 Selected Page 1 of 2			

Screenshot 2 (Bottom): This screenshot shows the 'Profiles' page with the 'Salesforce API Only System Integrations' profile selected. The 'Custom' checkbox is checked under the 'User License' column for this profile. Other profiles listed include salesmanager, Silver Partner User, Solution Manager, Standard Platform User, Standard User, and System Administrator.

Action	Profile Name	User License	Custom
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Del ...	salesmanager	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>
1-7 of 7 0 Selected Page 1 of 1			



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

Profiles Manager

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

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

Profile Detail		
Name: Manager User License: Salesforce Platform Description: Created By: QOPALE_01/10/2023, 7:09 pm Modified By: QOPALE_01/10/2023, 7:09 pm		
Page Layouts		
Standard Object Layouts	Global	Opening Hours
Email Application	Global Layout [View Assignment]	Order [View Assignment]
Home Page Layout	Not Assigned [View Assignment]	Order Product [View Assignment]
Account	Home Page Default [View Assignment]	Payment [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Payment Authorization [View Assignment]
Appointment Invitation	Alternative Payment Method Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]
Asset	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
	Asset Layout [View Assignment]	Payment Gateway [View Assignment]

Help for this Page

Profile Detail

Name: Manager
User License: Salesforce Platform
Description:
Created By: QOPALE_01/10/2023, 7:09 pm
Modified By: QOPALE_01/10/2023, 7:09 pm

Page Layouts

Standard Object Layouts

Global Global Layout [View Assignment] Order Order Layout [View Assignment]

Not Assigned [View Assignment] Order Product Order Product Layout [View Assignment]

Home Page Default [View Assignment] Payment Payment Layout [View Assignment]

Account Account Layout [View Assignment] Payment Authorization Payment Authorization Layout [View Assignment]

Alternative Payment Method Alternative Payment Method Layout [View Assignment] Payment Authorization Adjustment Payment Authorization Adjustment Layout [View Assignment]

Appointment Invitation Appointment Invitation Layout [View Assignment] Payment Authorization Adjustment Layout [View Assignment]

Asset Asset Layout [View Assignment] Payment Gateway Payment Gateway Layout [View Assignment]

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

Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name: Manager
User License: Salesforce Platform
Description:

Custom Profile:

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Home	Default On	Learning	Default On
Accounts	Default On	Learning	Default On
Alert Settings	Default On	Libraries	Tab Hidden
		Lightning Bolt Solutions	Default On

Salesforce Developer Session | Object Manager | Profiles | Finish update

SETUP Profiles

Communication Subscription Channel Types

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

Individuals

Locations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Consents	<input 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"/>					
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"/>					

Enhancement Requests

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

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Salesforce Developer Session | Object Manager | Profiles | Finish update

SETUP Profiles

Communication Subscription Channel Types

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

Individuals

Locations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Consents	<input 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"/>					
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"/>					

Enhancement Requests

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

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

Salesforce Setup screen showing the Profiles page. The left sidebar is expanded, showing the Profiles section under ADMINISTRATION.

Custom Object Permissions

	Bank	customers	Enhancement Requests									
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Basic Access	<input type="checkbox"/>											
Data Administration	<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 Setup screen showing the Profiles page. The left sidebar is expanded, showing the Profiles section under ADMINISTRATION.

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Salesforce Developer Session | 1280 Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

SETUP 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	Adrienne D'Yra	dadan	test_daya_nee_4i6tbyhjwkwkhs2rgnqkxox_3qg0tovzwareh43hazw6mea@gmail.com		<input checked="" type="checkbox"/>	UAMS User
Edit	Chatter Expert	Chatter	chatty.00d500000bcskkeab.lo6bfwvnpka@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit Login	Clinton, Amelia	self	amelia.ellington.1468xxc9po0ih.d5caedcuo4vh.hnbdwvwvhheh.wpuclcr1dely@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
Edit	S. GOPAL	gs	gs01520@gmail.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User Integration	integ	integration0004500000bcskkeab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d500000bcskkeab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

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

Salesforce Developer Session | 1280 Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

SETUP Users

New User

User Edit

General Information

First Name	<input type="text"/>	Role	<None Specified>
Last Name	<input type="text"/>	User License	Salesforce Integration
Alias	<input type="text"/>	Profile	Salesforce API Only System Integrations
Email	<input type="text"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text"/>	Offline User	<input type="checkbox"/>
Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>
Company	<input type="text"/>	Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Service Cloud User	<input type="checkbox"/>
Division	<input type="text"/>	Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Debug Mode	<input type="checkbox"/>

Salesforce Developer Session | 1280 Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name	sowmya
Last Name	bala
Alias	sbal
Email	2k20cse179@kiot.ac.in
Username	2k21fb@kiot.ac.in
Nickname	User169616771282564526
Title	worker
Company	kiot bank
Department	
Division	
Role	<None Specified>
User License	Salesforce Platform
Profile	Manager
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	-None-
Data.com Monthly Addition Limit	Default Limit (300)
Accessibility Mode (Classic Only)	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Debug Mode	<input type="checkbox"/>

Help for this Page

Salesforce Developer Session | 1280 Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Setup Home Object Manager

Users

sowmya bala

User Detail

Name	sowmya bala	Role	Salesforce Platform
Alias	sbal	Profile	Manager
Email	2k20cse179@kiot.ac.in [Verify]	Active	<input checked="" type="checkbox"/>
Username	2k21fb@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User169616771282564526	Offline User	<input type="checkbox"/>
Title	worker	Knowledge User	<input type="checkbox"/>
Company	kiot bank	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address		Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input type="checkbox"/>
Language	English	Data.com User Type	<input type="checkbox"/>
Delegated Approver	Manager	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>

User Profile Help for this Page

WhatsApp | Salesforce Dev | (128) Top Hits 20 | Object Manager | Users | Salesforce | Downloads | Welcome to Sale | Reset Password | +

mail.google.com/mail/u/0/#inbox/1MfcgzGbzStillSsqKKLzCGhbDnsOxdvf

Gmail Search in mail Active ? ☰ KNOWLEDGE

Compose Mail Chat Spaces Meet Labels

Inbox 5,318 support@salesforce.com <support@salesforce.com> to me 7:13 PM (0 minutes ago) Starred Snoozed Sent Drafts 5 More

99+ 1 of 6,486

 salesforce

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:
2k21it@klot.ac.in

Again, welcome to Salesforce!

WhatsApp | Salesforce Dev | (128) Top Hits | Object Manager | Users | Sales | Downloads | Welcome to S | Recently Viewed | Change Your | + | Finish update



Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password

 Good

* Confirm New Password

 Match

Security Question

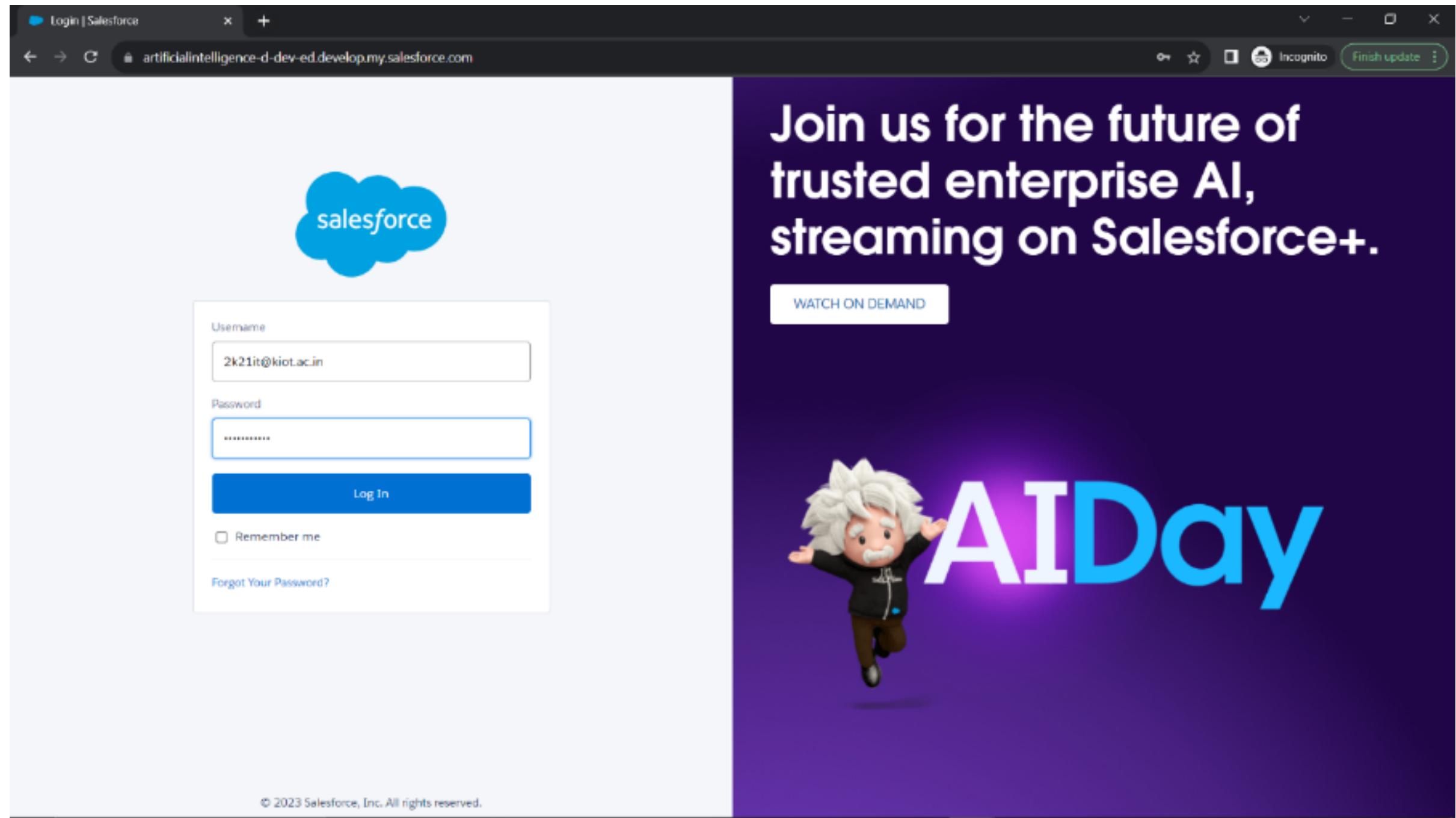
In what city were you born?

* Answer

 salem

Change Password

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



This screenshot shows the Salesforce Lightning interface. At the top, the URL is 'artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/list?filterName=Recent'. The main content area displays a list titled 'Recently Viewed' under the 'Bank' tab. It shows a single entry: '0 items • Sorted by Bank Name • Updated a few seconds ago'. A sorting dropdown is visible next to the title. To the right of the list is a sidebar with the user's profile picture and name ('sowmiya bala'), the URL ('artificialintelligence-d-dev-ed.develop.my.s...'), and links for 'Settings' and 'Log Out'. The sidebar also includes sections for 'DISPLAY DENSITY' (set to 'Comfy') and 'OPTIONS' (with links to 'Switch to Salesforce Classic' and 'Add Username'). At the bottom of the sidebar is a 'List View' link.

New Bank | Salesforce

Recently Viewed ▾

0 items • Updated a few seconds ago

Bank Name

New Bank

Information

* Bank Name
boi

* phoneno
0897754534

Owner
sowmiya bala

Cancel Save & New Save

List View

Incognito Finish update

New

New customer | Salesforce

Recently Viewed ▾

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

customer Name

New customer

Information

* customer Name
madhu

* Bank
boi

Cancel Save & New Save

List View

Incognito Finish update

New

madhu | customer | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/r/customer_c/a025j00000f0YFaAM/view

customer madhu was created.

customer Name: madhu
Bank: boi
Created By: sowmiya bala, 01/10/2023, 7:17 pm
Last Modified By: sowmiya bala, 01/10/2023, 7:17 pm

List View

WhatsApp | Salesforce Developer Session 2 | 128 Top Hits 2023 | New Proj | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

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

SETUP Profiles

Profiles

All Profiles | Edit | Delete | Create New View

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

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

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

javascript:relUp(%27%26_ur%2fperm%2fu%2fprofile%2fprofileClone%2fe%3Fid%3D00e5j000003uvKu%26setupid%3DEnhancedProfiles%26retURL%3D%252F00e%253fcfc%253D0085j000000c7U%2526rolodexIndex%253D18%2526page%253D1%2526sdtp%253Dp1%26esdtp%26...

Salesforce Developer Session 2 | 128 Top Hits 2023 | New Proj | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

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

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile Standard Platform User
User License Salesforce Platform
Profile Name Required Information

Save Cancel

Salesforce Developer Session 2 | 128 Top Hits 2023 | New Proj | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

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

SETUP Profiles

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.

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

Profile Detail

Name	salesmanager	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	QOPALE_01/10/2023, 7:19 pm	Modified By	QOPALE_01/10/2023, 7:19 pm

Page Layouts

Standard Object Layouts	Global	Opening Hours
Email Application	Global Layout [View Assignment]	Order [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product [View Assignment]
Account	Account Layout [View Assignment]	Payment [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment Authorization [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Gateway [View Assignment]

Salesforce Developer Session 2 | Top Hits 2023 | New Proj | Profiles | Salesforce | Welcome to Salesforce: Verify your...

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

Profile Edit salesmanage

Name: salesmanage User License: Salesforce Platform Description: Custom Profile:

Custom App Settings

	Visible	Default		Visible	Default	
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input type="radio"/>		Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input type="radio"/>		WDC (standard_Week)	<input type="checkbox"/>	<input type="radio"/>
iot (iot)	<input checked="" type="checkbox"/>	<input type="radio"/>				

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations: Standard Tab Settings: Home Default On Learning: Default On

Contact Point Email:

User External Credentials:

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

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:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

Salesforce Developer Session 2 | Top Hits 2023 | New Proj | Profiles | Salesforce | Welcome to Salesforce: Verify your...

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

Profile Edit salesmanage

Name: salesmanage User License: Salesforce Platform Description: Custom Profile:

Custom App Settings

	Visible	Default		Visible	Default	
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input type="radio"/>		Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input type="radio"/>		WDC (standard_Week)	<input type="checkbox"/>	<input type="radio"/>
iot (iot)	<input checked="" type="checkbox"/>	<input type="radio"/>				

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations: Standard Tab Settings: Home Default On Learning: Default On

Contact Point Email:

User External Credentials:

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

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:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

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

- Header:** The top navigation bar includes tabs for WhatsApp, Salesforce Developer Session 2, Top Hits 2023, New Poj, Profiles || Salesforce, and Welcome to Salesforce. The URL in the address bar is <https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%2Fe%3FretURL%3D%252F0...>.
- Page Header:** The page title is "SETUP Profiles".
- Left Sidebar:** The sidebar under "Setup" contains links for Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration.
- Administration Sub-Menu:** Under Administration, "Users" is expanded, showing sub-links for Permission Set Groups, Permission Sets, Profiles (which is selected), Public Groups, Queues, Roles, User Management Settings, and Users.
- Content Area:** The main content area displays the "Custom Object Permissions" section for the "Bank" and "customers" objects. It includes tables for "Basic Access" and "Data Administration" permissions. The "Bank" object has "Read", "Create", and "View All" checked for both objects. The "customers" object has "Read" and "View All" checked for "Bank" and "Create" checked for "customers".
- Session Settings:** This section includes fields for "Session Times Out After" (set to "2 hours of inactivity") and "Session Security Level Required at Login" (set to "None").
- Password Policies:** This section lists various password requirements:
 - User passwords expire in: 90 days
 - Enforce password history: 3 passwords remembered
 - Minimum password length: 8
 - Password complexity requirement: Must include alpha and numeric characters
 - Password question requirement: Cannot contain password
 - Maximum invalid login attempts: 10
 - Lockout effective period: 15 minutes
 - Obscure secret answer for password resets: (unchecked)
 - Require a minimum 1 day password lifetime: (unchecked)
 - Don't immediately expire links in forgot password emails: (unchecked)
- Footer:** The bottom of the page features standard Salesforce buttons: Save, Save & New, and Cancel.

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

- Header:** The top navigation bar includes tabs for WhatsApp, Salesforce Developer Session 2, Top Hits 2023, New Poj, Users | Salesforce, and Welcome to Salesforce. A "Finish update" button is also present.
- Left Sidebar:** The sidebar is titled "Setup" and contains a search bar with "user". It lists several categories under "Users": Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings (highlighted), and Users (selected). Other sections include Feature Settings (Data.com, Prospector Users, Service, Embedded Service, Messaging for In-App and Web User Verification), User Interface (Action Link Templates, Actions & Recommendations), and App Menu.
- Central Content:** The main area is titled "SETUP" and "Users". It displays the "New User" page. The "User Edit" section has buttons for Save, Save & New, and Cancel. The "General Information" section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. To the right, there is a "Required Information" section with dropdown menus for Role (None Specified), User License (Salesforce Integration), Profile (Salesforce API Only System Integrations), and Active (checked). Below these are checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (None), Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling (checked), and Debug Mode.

Salesforce Developer Session 2 | Top Hits 2023 | New Proj | Users | Salesforce | Welcome to Salesforce: Verify your...

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name: madhu
Last Name: b
Alias: mb
Email: 2k20cse179@kiot.ac.in
Username: 2k20cse179
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: -None-
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:
Load Lightning Pages While Scrolling:
Debug Mode:

Help for this Page

Salesforce Developer Session 2 | Top Hits 2023 | New Proj | Users | Salesforce | Welcome to Salesforce: Verify your...

Setup Home Object Manager

Users

Mailing Address

Street:
City:
Zip/Postal Code:
State/Province:
Country:

Single Sign On Information

Federation ID:

Locale Settings

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale: English (India)
Language: English

Approver Settings

Delegated Approver:
Manager:
Receive Approval Request Emails: Only if I am an approver
Generate new password and notify user immediately

Save Save & New Cancel

Salesforce Developer Session 2 | 128 Top Hits 2023 | New Proj | Users | Salesforce | Welcome to Salesforce: Verify your...

Setup Home Object Manager

user

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu

SETUP Users

Mailing Address

Street	4/194 , aniyampalayam, uthamasolapuram ..
City	SALEM
Zip/Postal Code	636300
State/Province	TAMIL NADU
Country	

Single Sign On Information

Federation ID	
---------------	--

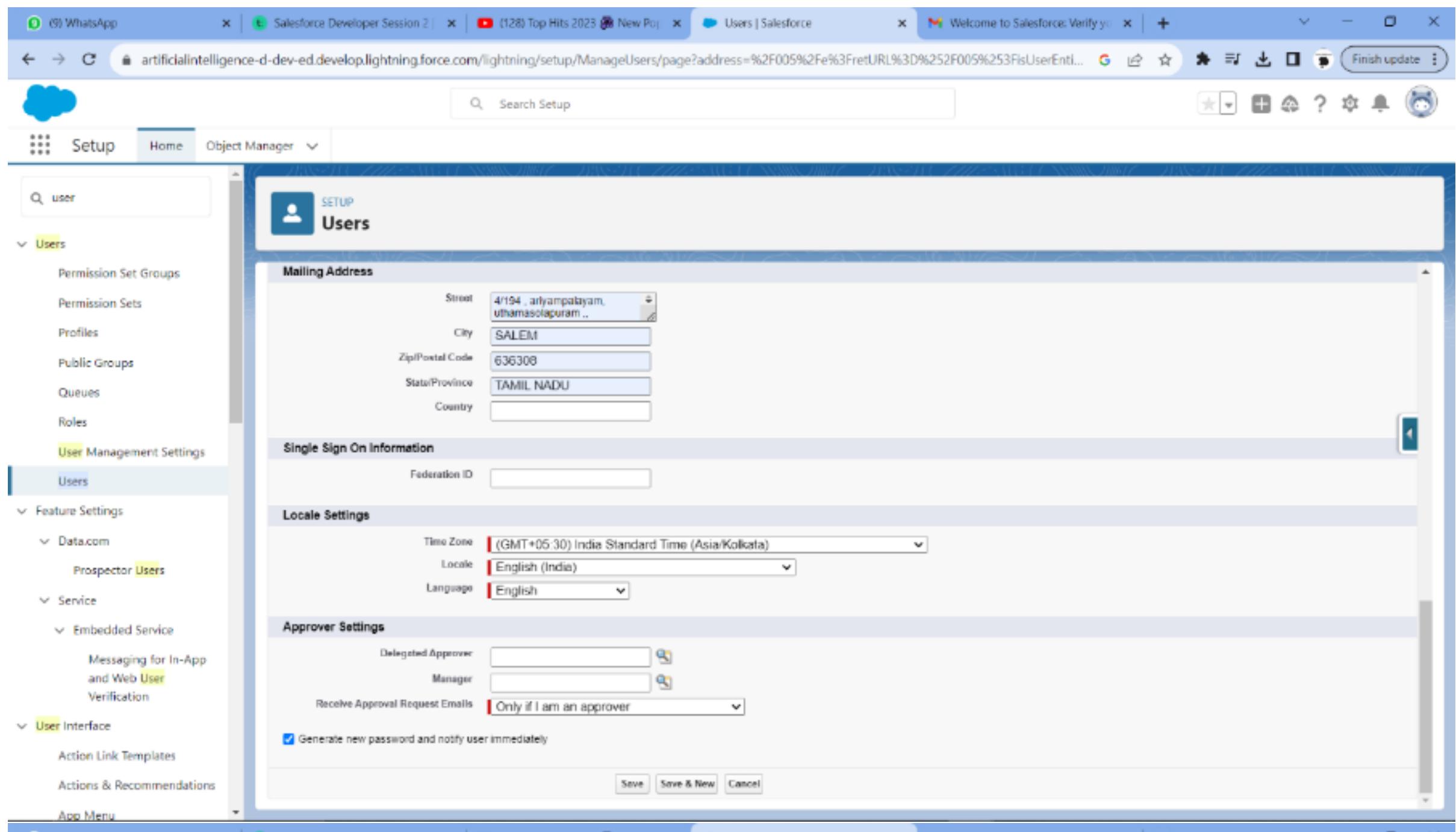
Locale Settings

Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English

Approver Settings

Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
<input checked="" type="checkbox"/> Generate new password and notify user immediately	

Save Save & New Cancel



Salesforce Developer Session 2 | 128 Top Hits 2023 | New Proj | Users | Salesforce | Welcome to Salesforce: Verify your...

Setup Home Object Manager

user

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu

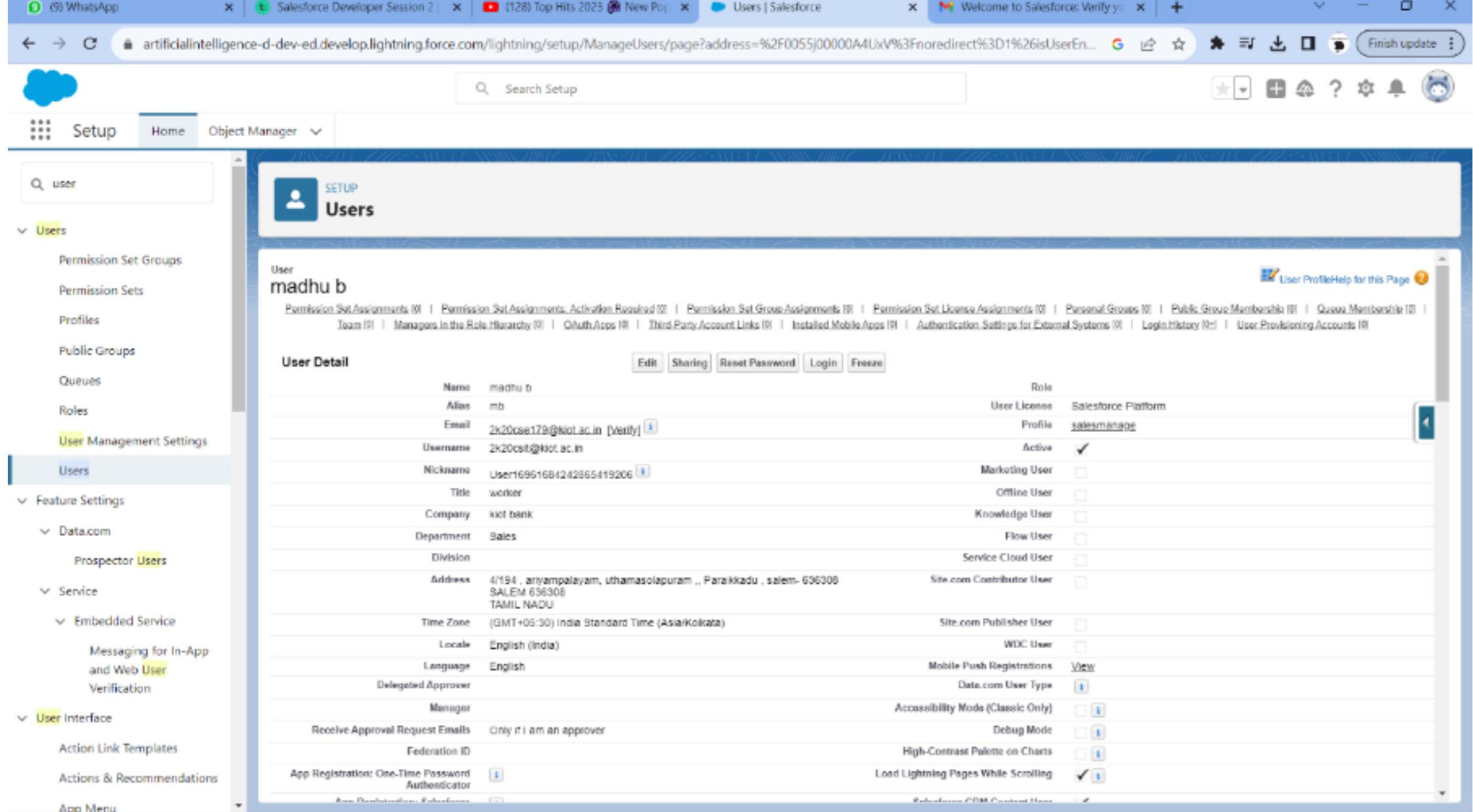
SETUP Users

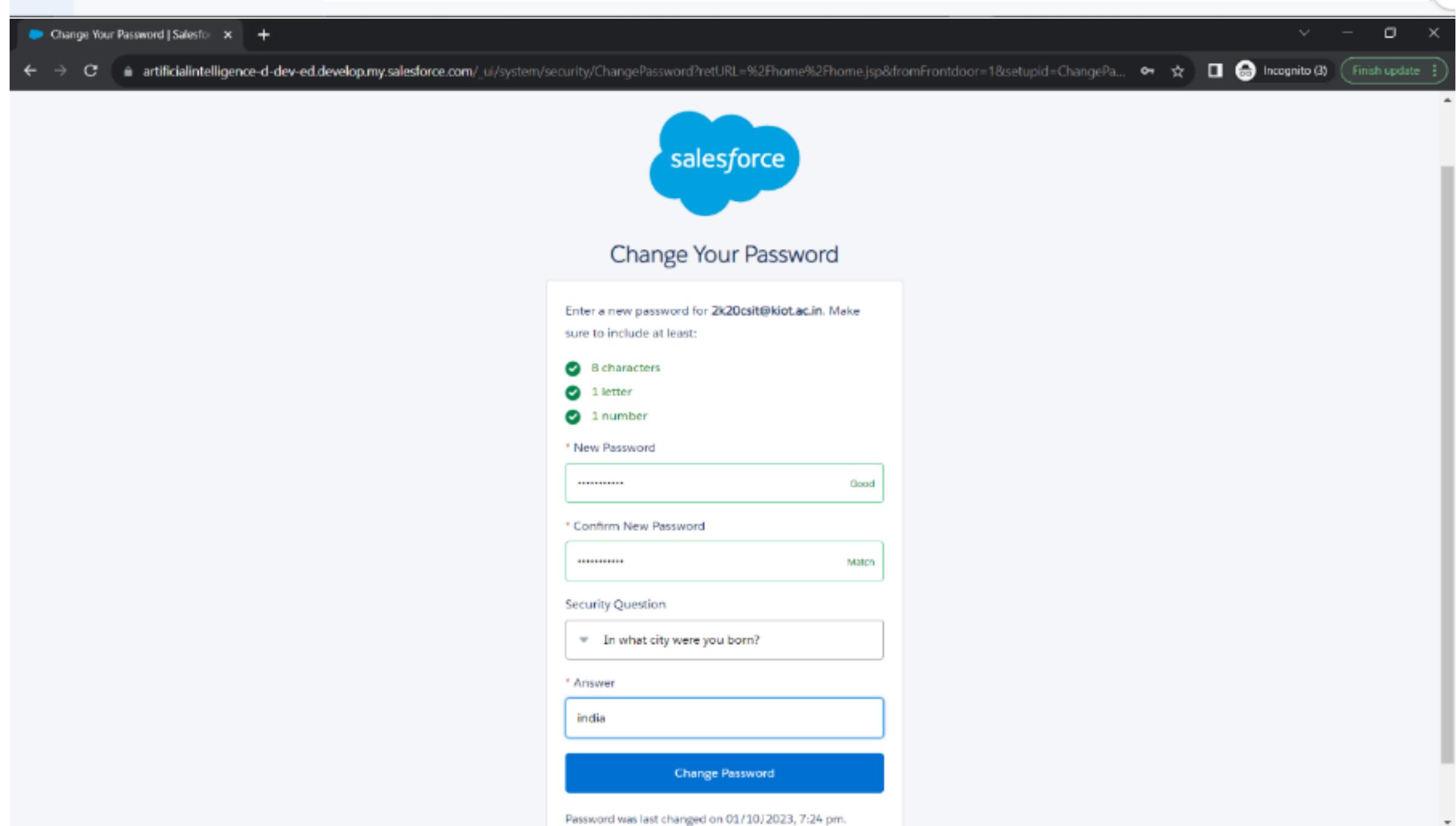
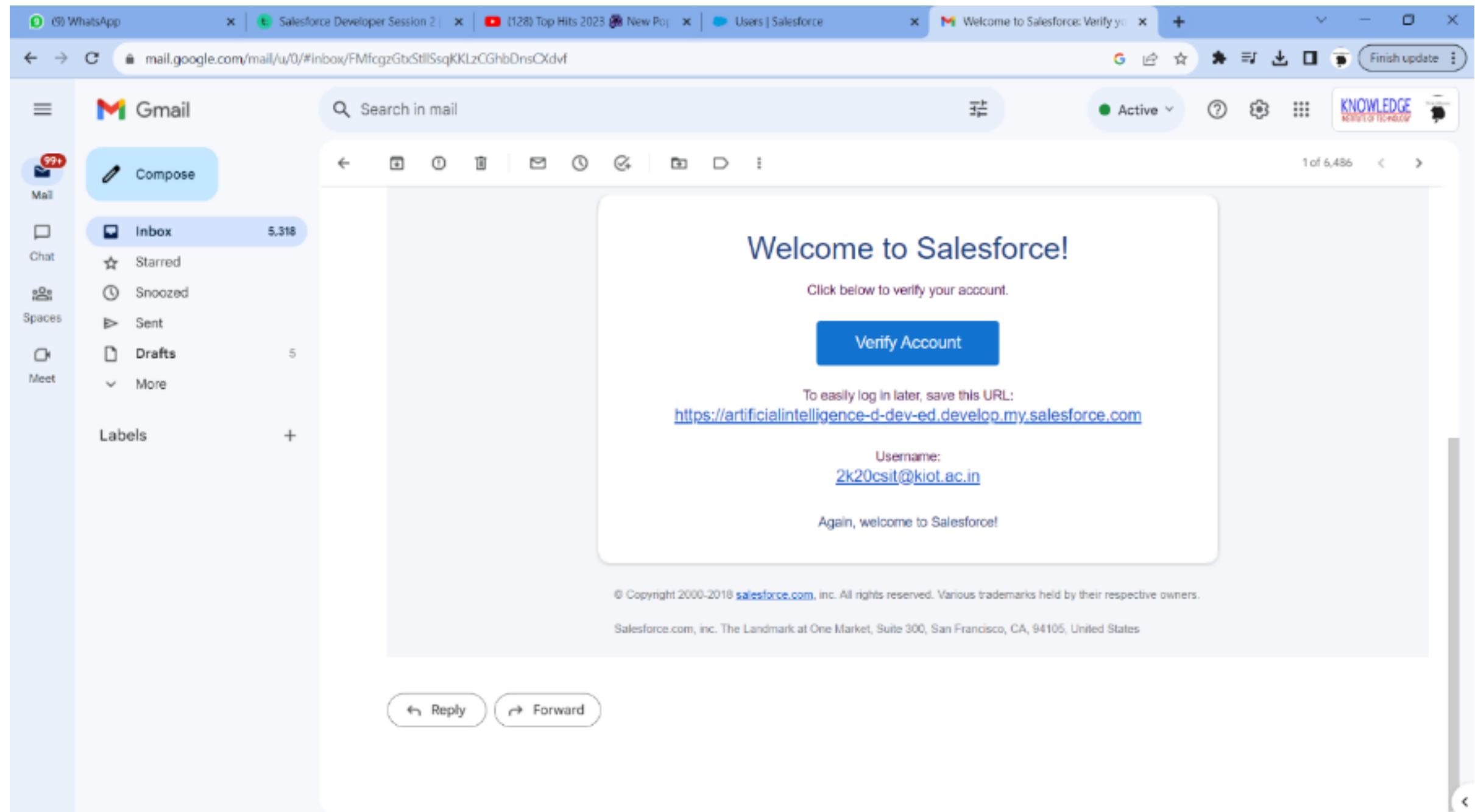
User

madhu b

User Detail

Name	madhu b	Role	Salesforce Platform
Alias	mb	Profile	salesman004
Email	2k20ce179@kot.ac.in [Verify]	Active	<input checked="" type="checkbox"/>
Username	2k20ce179@kot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User16951684242865419206	Offline User	<input type="checkbox"/>
Title	worker	Knowledge User	<input type="checkbox"/>
Company	kot bank	Flow User	<input type="checkbox"/>
Department	Sales	Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	4/194 , aniyampalayam, uthamasolapuram .., Parakkadu , salem- 636300	Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input type="checkbox"/> View
Language	English	Data.com User Type	<input type="checkbox"/> View
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> View
Manager		Debug Mode	<input type="checkbox"/> View
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palms on Charts	<input type="checkbox"/> View
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator			





Recently Viewed | Bank | Salesfo... x

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

Incognito (3) Finish update

Search...

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

New

List View

This screenshot shows the 'Recently Viewed' list for Banks in the Salesforce Lightning interface. The list is currently empty, displaying the message 'You haven't viewed any Bank recently. Try switching list views.'

Recently Viewed | customers | S... x

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

Incognito (3) Finish update

Search...

customers Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

This screenshot shows the 'Recently Viewed' list for customers in the Salesforce Lightning interface. Similar to the Banks list, it is empty with the message 'You haven't viewed any customers recently. Try switching list views.'

(S) WhatsApp x | Salesforce Developer Session x | (128) Top Hits 2023 x | Permission Sets | Salesforce x | Welcome to Salesforce: Ve... x | Reset Password | Salesforce x | +

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

Finish update

Setup Home Object Manager

Search Setup

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

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

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

This screenshot shows the 'Permission Sets' list in the Salesforce Setup interface. It displays a table of permission sets, each with a checkbox, a label, a description, and a license name. The table includes rows for 'Access to Activity', 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order Management Agent', 'Order Management Operations Manager', and 'Order Management Shopper'. The 'Buyer' and 'Buyer Manager' rows are highlighted in yellow, indicating they are selected.

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.

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce

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"/>	Access to activity	Allows access to the store. Lets users see products and categories, includes all Buyer capabilities, and allows access to manage carts and...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Denotes that the user is a Sales Cloud or Service Cloud user.	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	Commerce Admin
<input type="checkbox"/>	Commerce Admin	Allows access to commerce admin features.	Commerce Cloud Voice User
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Contact Center Admin
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Contact Center Supervisor
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Expense Profile Manager
<input type="checkbox"/>	Expense Profile Manager	Lets users create, read, edit, and delete locations, sublocations, queues, and...	Facility Manager
<input type="checkbox"/>	Field Service Mobile Standard PermSet	Give your mobile workforce access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/>	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User
<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
<input type="checkbox"/>	Order Management Shopper	Limited access to Order Management features for Self Service.	Lightning Order Management User

1-28 of 28 | 0 Selected | Page 1 of 2

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce

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

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce

Permission Sets

Permission Set Create

Enter permission set information

Label: salesmanager API Name: salesmanager Description:
Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License: Save | Cancel

Salesforce Setup Page - Permission Sets

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar is collapsed, showing the main menu under 'Setup'. The current page is 'Permission Sets' for a permission set named 'salesmanager'. The 'Permission Set Overview' section displays basic details: API Name 'salesmanager', Namespace Prefix 'GODALS', and Created By 'GODALS' on 01/10/2023 at 7:29 pm. The 'Apps' section lists various app-related permissions.

Category	Description
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

Salesforce Setup Page - Permission Sets

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar is collapsed, showing the main menu under 'Setup'. The current page is 'Permission Sets' for a permission set named 'salesmanager'. The 'Permission Set Overview' section shows the user has navigated to the 'Object Settings' tab. The 'Object Settings' table lists various objects and their permissions.

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

Salesforce Developer Session | artificalintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008Phok%3Fs%3DEntityPermissions%26o%3D... | Permission Sets | Salesforce | Welcome to Salesforce: Vi... | Reset Password | Salesforce | Finish update

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. A permission set named 'salesmanager' is selected. Under the 'Bank' object, the 'Tab Settings' section has 'Visible' checked. In the 'Object Permissions' section, 'Read' and 'View All' are checked. In the 'Field Permissions' section, 'Read Access' is checked for all fields: 'Bank Name', 'Created By', and 'Last Modified By'. There is a 'Save' button at the bottom.

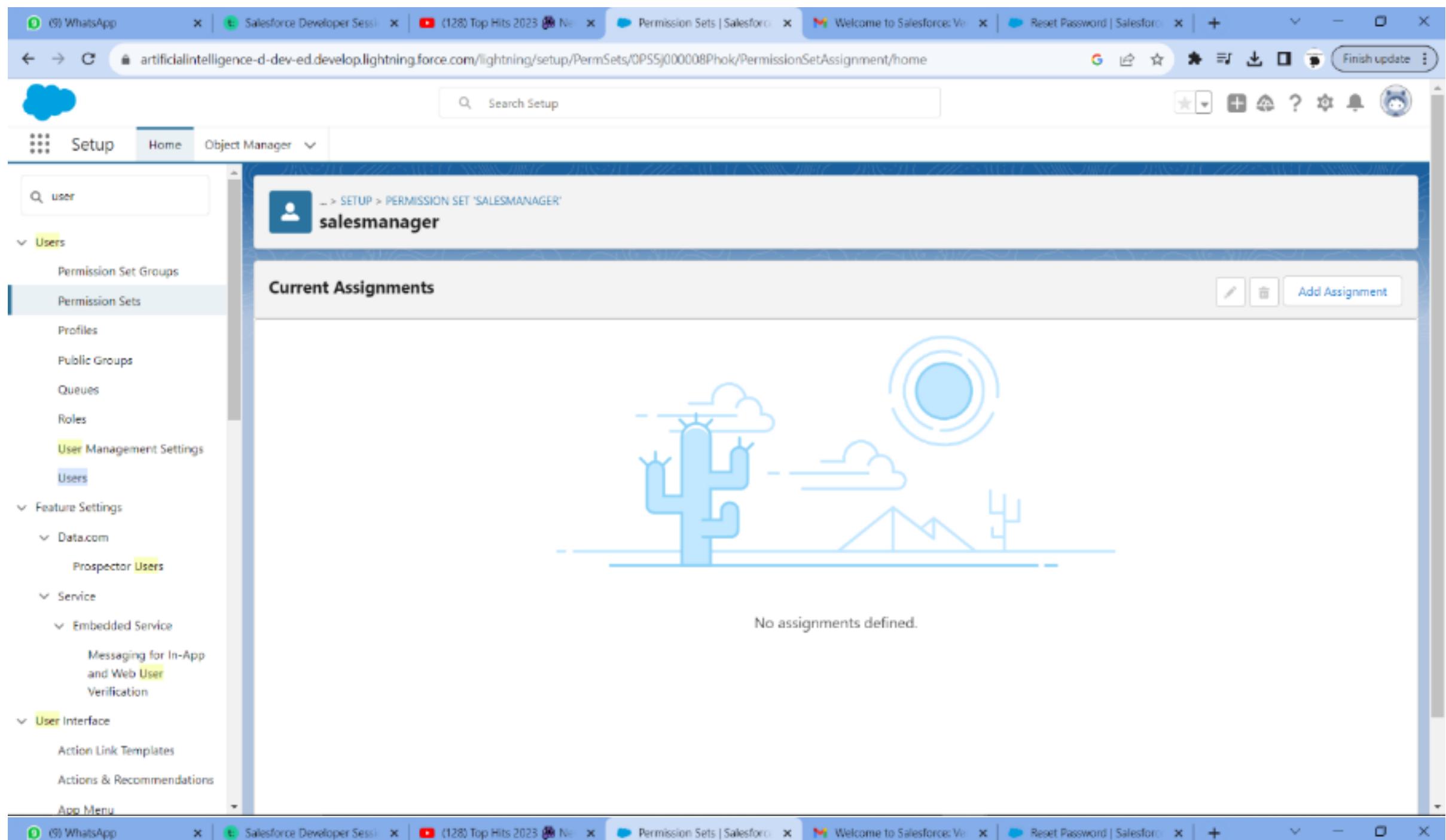
Salesforce Developer Session | artificalintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008Phok%3Fs%3DEntityPermissions%26o%3D... | Permission Sets | Salesforce | Welcome to Salesforce: Vi... | Reset Password | Salesforce | Finish update

This screenshot shows the same Salesforce setup interface as the previous one, but with different permission settings for the 'Bank' object in the 'salesmanager' permission set. In the 'Object Permissions' section, 'Create' and 'Edit' are now checked, while 'Read' and 'View All' are unchecked. The 'Field Permissions' section remains the same. A 'Save' button is visible at the bottom.

Salesforce Setup interface showing the 'Current Assignments' screen for the 'SALESMANAGER' permission set. The sidebar navigation is visible on the left.

Current Assignments

No assignments defined.



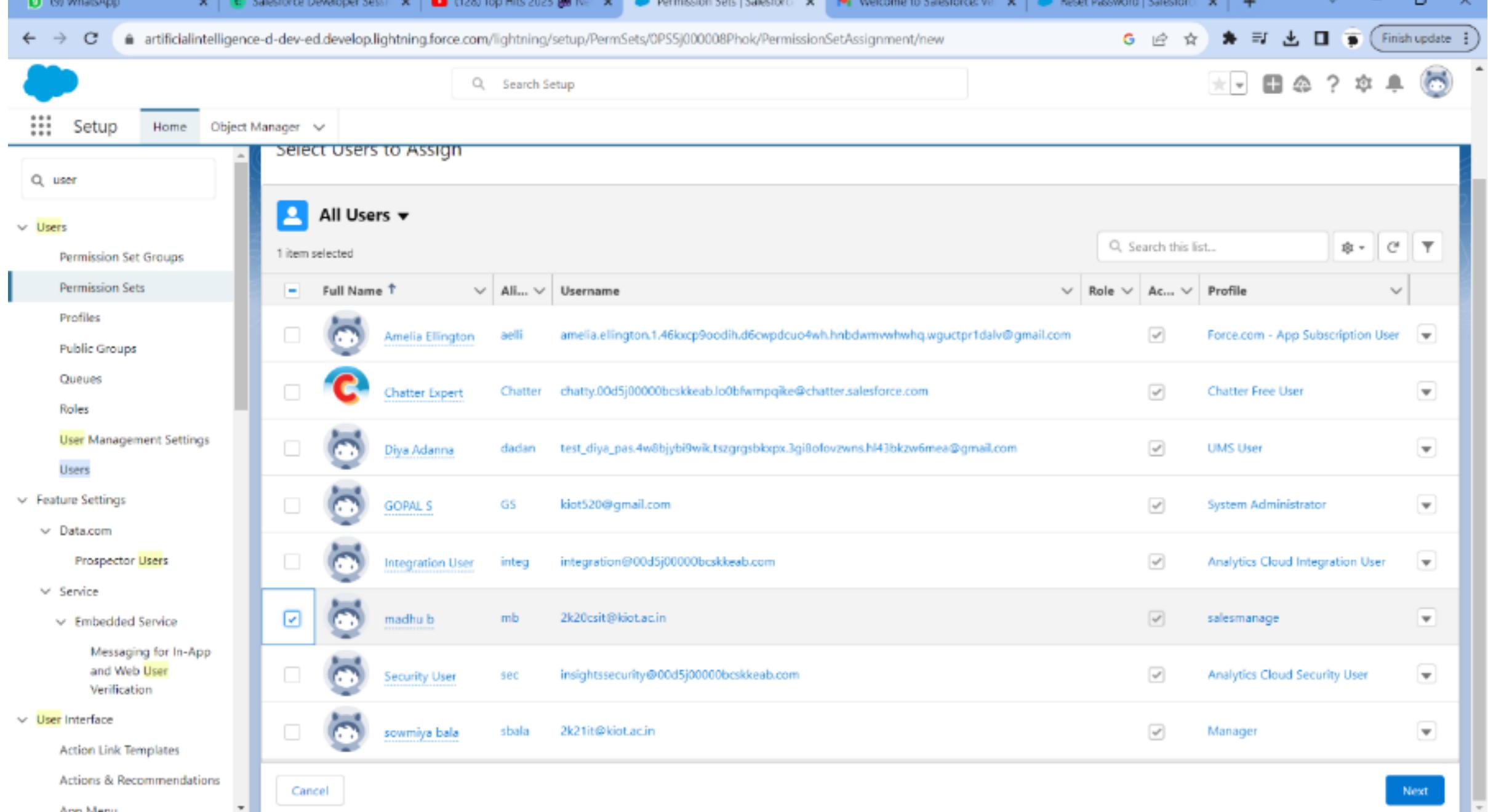
Salesforce Setup interface showing the 'Select Users to Assign' screen. The sidebar navigation is visible on the left.

Select Users to Assign

All Users

Full Name	Ali...	Username	Role	Profile
Amelia Ellington	alli	amelia.ellington.1.46kxcp9oodih.d6cwpdcuo4wh.hnbdwmwwhhq.wguctprfdalv@gmail.com	<input checked="" type="checkbox"/>	Force.com - App Subscription User
Chatter Expert	Chatter	chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User
Diya Adanna	dadian	test_diya_pas.4w@bjyb0wik.tszgrgsblkpx.3gi0fovzwns.h43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>	UMS User
GOPAL S	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>	System Administrator
Integration User	integ	integration@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>	salesmanage
Security User	sec	insightssecurity@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User
sowmiya bala	sbala	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>	Manager

Next



Salesforce Setup screen showing the 'Permission Sets' section. A user named 'madhu b' is selected for assignment.

Select an Expiration Option For Assigned Users

No expiration date (selected) or Specify the expiration date (radio button options: 1 Day, 1 Week, 30 Days, 60 Days, Custom Date). Time Zone dropdown: Select a time zone...

Selected Users

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

Assignment Summary

... > PERMISSION SET 'SALESMANAGER' salesmanager

1 assignments were successful.

Assignment Summary table:

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

Buttons: Back, Assign, Cancel.

Salesforce Setup screen showing the 'Permission Sets' section. A user named 'madhu b' is selected for assignment.

Assignment Summary

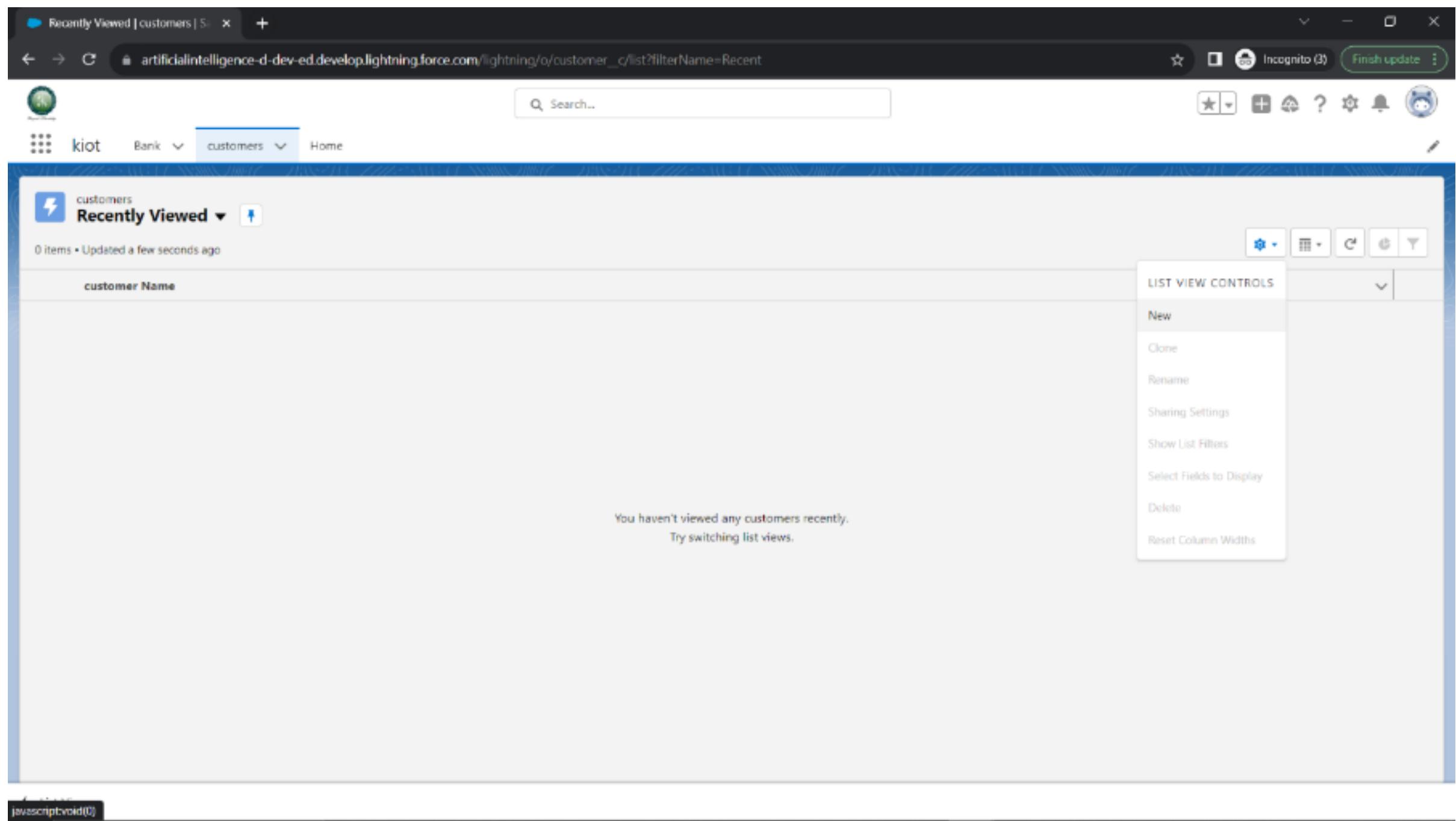
... > PERMISSION SET 'SALESMANAGER' salesmanager

1 assignments were successful.

Assignment Summary table:

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

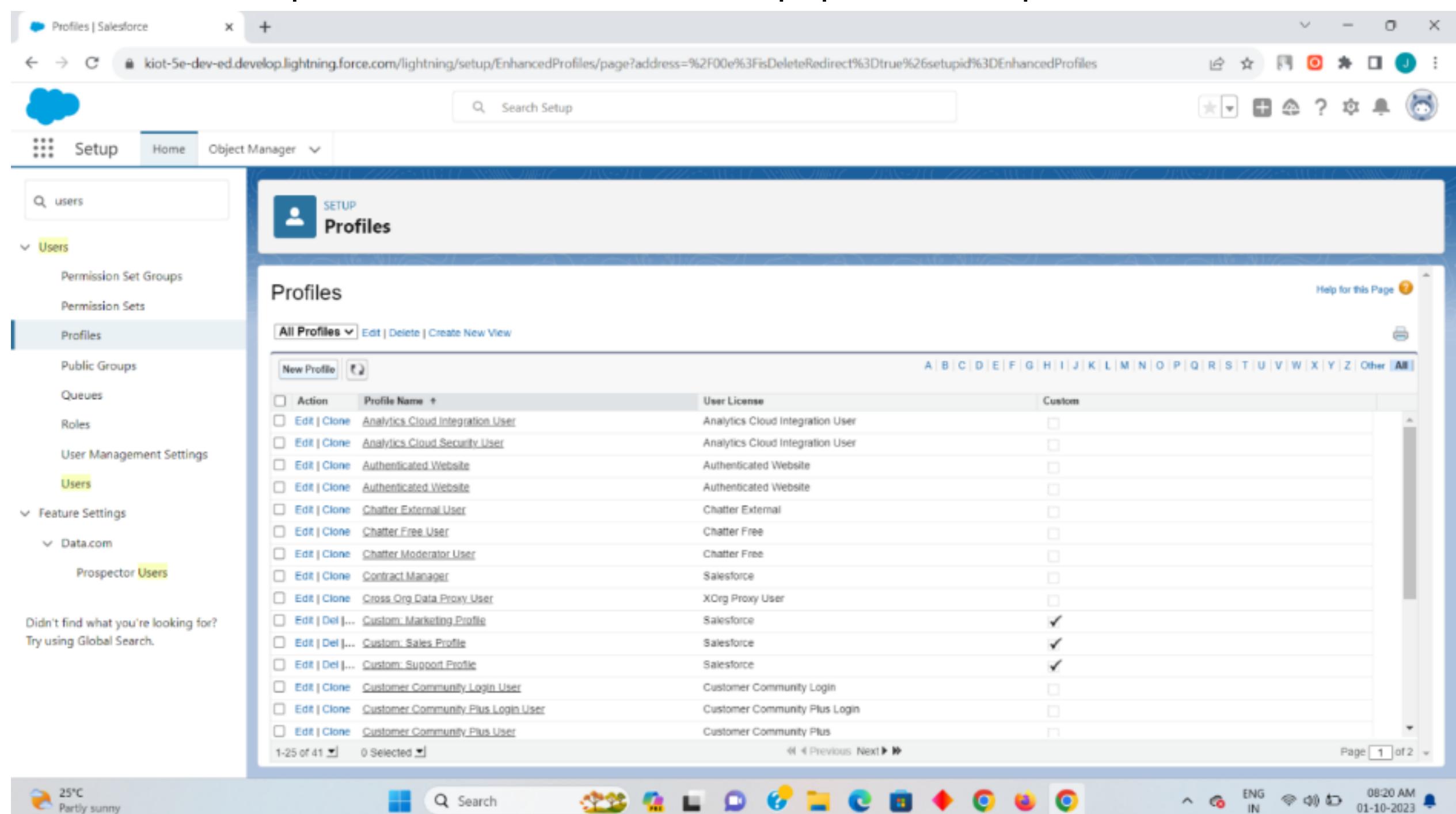
Buttons: Done.



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

Solution:

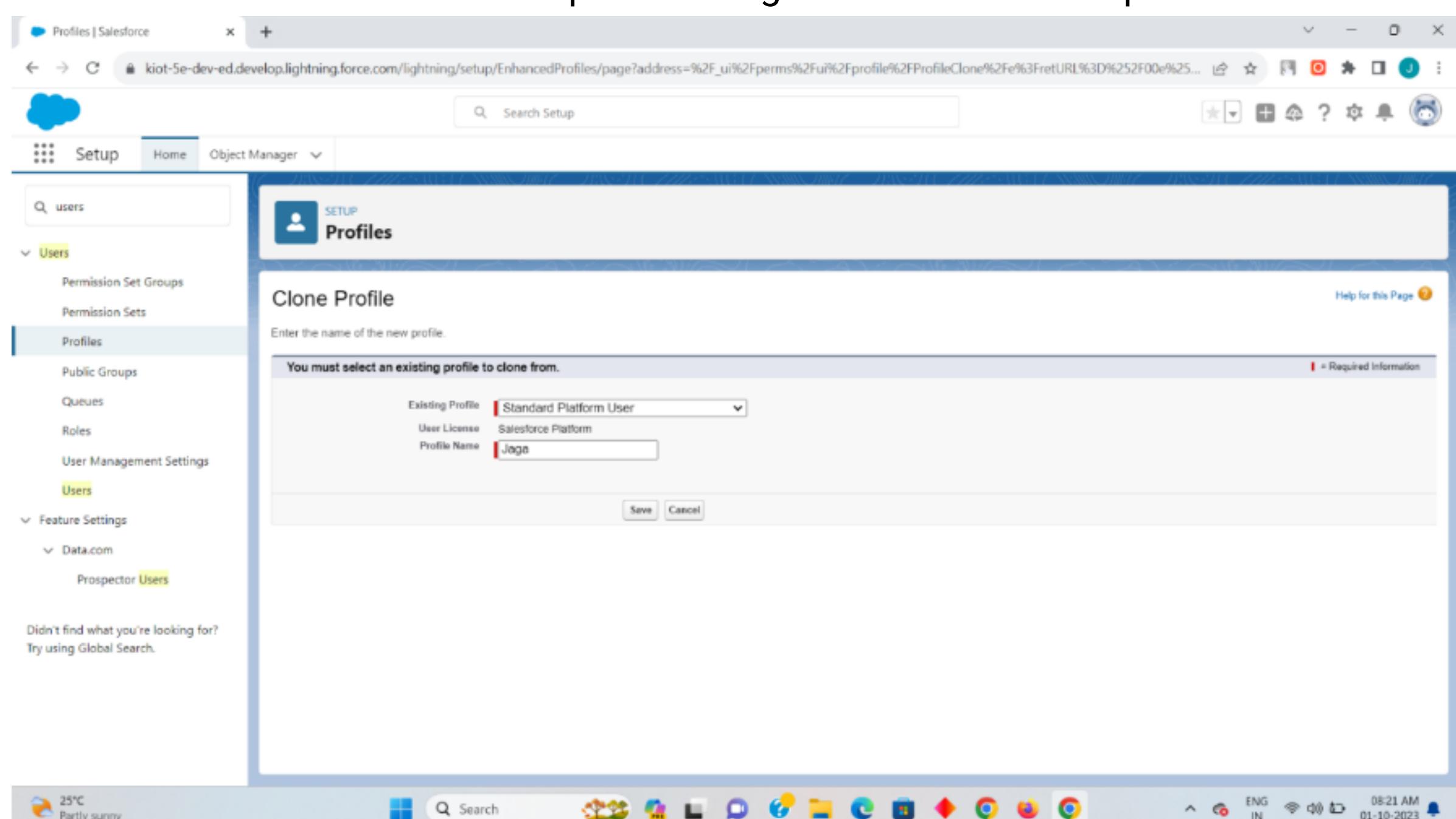
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per. Setup-quick search[profile]



The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes options like Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, and Users. The main content area displays a table of profiles with columns for Action, Profile Name, User License, and Custom. Several profiles are listed, such as Analytics Cloud Integration User, Analytics Cloud Security 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 User, and Customer Community Plus User. The 'Custom' column shows checkboxes for some profiles, notably the last three.

Step 2:

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



The screenshot shows the Salesforce Setup interface under the Profiles section, specifically the 'Clone Profile' sub-page. 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, it says 'You must select an existing profile to clone from.' A dropdown menu for 'Existing Profile' shows 'Standard Platform User' selected. The 'User License' field is set to 'Salesforce Platform' and the 'Profile Name' field contains 'Jaga'. At the bottom are 'Save' and 'Cancel' buttons.

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.

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

- Header:** The URL is `kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%3Fsetupid%3DEnhancedProfiles`. The browser toolbar includes icons for back, forward, search, and refresh.
- Left Sidebar:** Under the "Setup" tab, the "Users" section is expanded, showing "Permission Set Groups", "Permission Sets", "Profiles" (which is selected), "Public Groups", "Queues", "Roles", "User Management Settings", and "Feature Settings". Under "Feature Settings", "Data.com" is expanded, showing "Prospector" and "Users". A note says "Didn't find what you're looking for? Try using Global Search." The "Users" section is highlighted in yellow.
- Page Content:**
 - Section Header:** SETUP Profiles Jaga
 - Description:** "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." A "Help for this Page" link is available.
 - Permissions:** A list of permissions is shown, each with an edit link:
 - Login IP Ranges
 - Enabled Apex Class Access
 - Enabled Visualforce Page Access
 - Enabled External Data Source Access
 - Enabled Named Credential Access
 - Enabled External Credential Principal Access
 - Enabled Custom Metadata Type Access
 - Enabled Custom Setting Definitions Access
 - Enabled Flow Access
 - Enabled Service Presence Status Access
 - Enabled Custom Permissions
 - Profile Detail:** A table with columns "Name" (Jaga), "User License" (Salesforce Platform), "Custom Profile" (checked), "Description", "Created By" (Jagadesh S, 01/10/2023, 8:21 am), and "Modified By" (Jagadesh S, 01/10/2023, 8:21 am). Buttons for "Edit", "Close", "Delete", and "View Users" are at the top right.
 - Page Layouts:** A table for "Standard Object Layouts" with columns "Object" (Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation), "Layout Name" (Global Layout, Not Assigned, Home Page Default, Account Layout, Alternative Payment Method Layout, Appointment Invitation Layout), and "Assignment" (View Assignment, View Assignment, View Assignment, View Assignment, View Assignment, View Assignment).
- Bottom:** The taskbar shows the Windows Start button, a search bar, and various pinned application icons including Microsoft Edge, File Explorer, and the Control Panel. The system tray shows the date (01-10-2023), time (08:21 AM), battery level, and network status.

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

- Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:**
 - Setup (selected)
 - Home
 - Object Manager
 - Users:** Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, Users
 - Feature Settings:** Data.com, Prospector (Users)

Didnt find what you're looking for? Try using Global Search.
- Central Content:**

SETUP Profiles

Communication Subscription Channel Types

	Communication Subscription Channel 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
Communication Subscription Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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
Providers	<input type="checkbox"/>											
Resources	<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.

System Status: 25°C Partly sunny

Bottom Navigation: Search, Home, Object Manager, Setup, Help, Notifications, User Profile

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

- Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:**
 - Setup
 - Home
 - Object Manager
 - Users:** Permission Set Groups, Permission Sets, **Profiles**, Public Groups, Queues, Roles, User Management Settings, Users
 - Feature Settings:** Data.com, **Prospector Users**
- Current Page:** SETUP Profiles
- Content Area:**
 - Communication Subscription Consent Types:** A grid of checkboxes for various consent types across different categories.
 - Custom Object Permissions:** A section with two tables of basic access and data administration permissions for Providers and Resources.
 - Session Settings:** Session Times Out After (2 hours of inactivity), Session Security Level Required at Login (None).
 - Experience Cloud login policies:** Options for separate site authentication, relaxing IP restrictions, and skipping device activation.

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

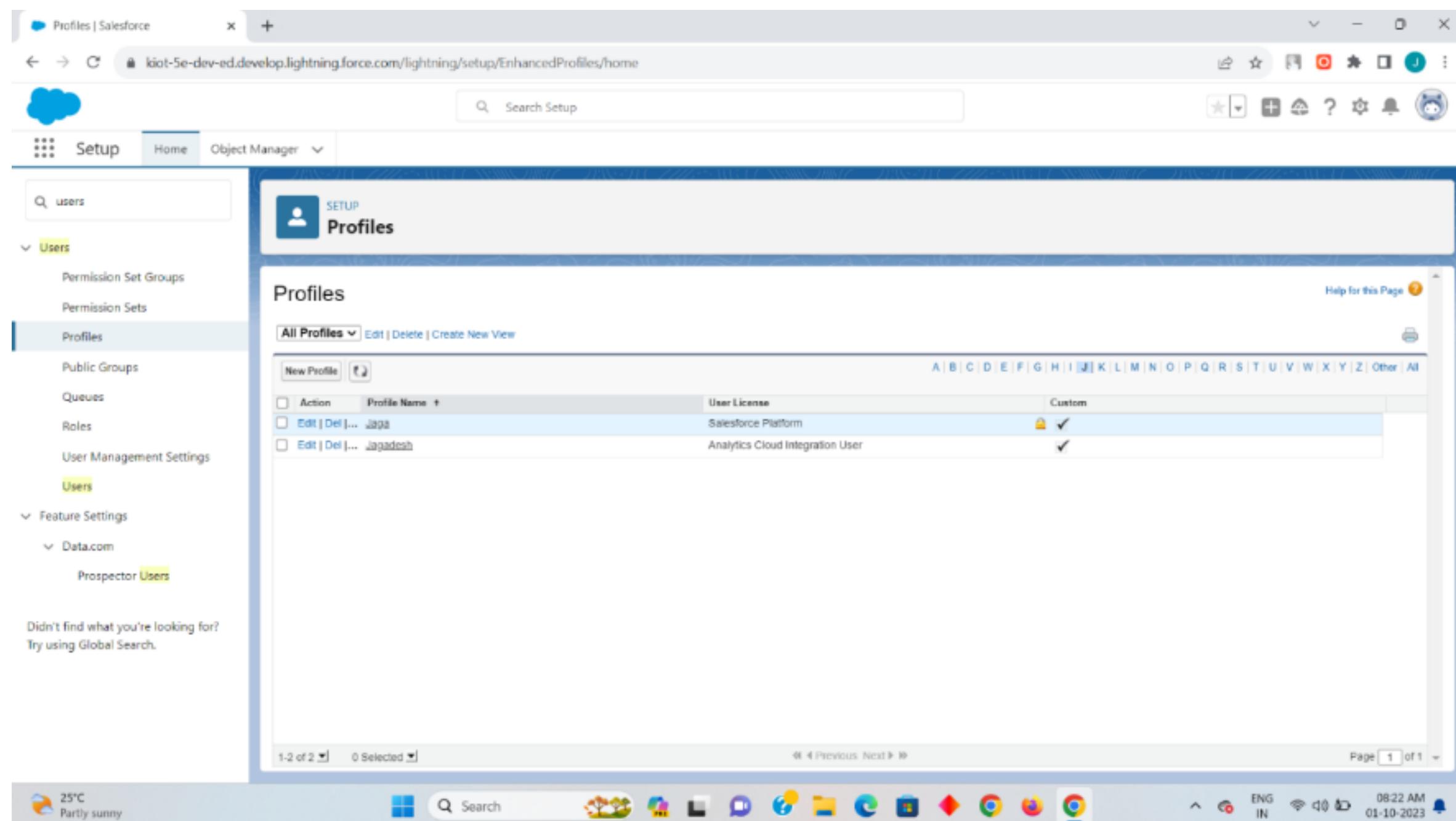
- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Setup Tab:** The main tab is "Setup". Other tabs include Home and Object Manager.
- Left Sidebar (Users Section):**
 - Search bar: users
 - Categories:
 - Permission Set Groups
 - Permission Sets
 - Profiles** (selected)
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
 - Users** (highlighted in yellow)
 - Feature Settings
 - Data.com
 - Prospector Users
- Profile Edit Screen:**
 - Profile Edit:** Jaga
 - Help for this Page
 - Set the permissions and page layouts for this profile.
 - Profile Edit Form:**

Name	Jaga	Save	Save & New	Cancel
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>		
Description				
 - Custom App Settings:** A table showing app visibility and default status.

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input type="radio"/>	Platform (standard_Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input type="radio"/>
Hive App (Hive_App)	<input checked="" type="checkbox"/>	<input type="radio"/>			
 - Service Provider Access:** (Section header)
 - Tab Settings:** (Section header)
 - Overwrite users' personal tab customizations

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



The screenshot shows the Salesforce Setup interface for managing profiles. The left sidebar is collapsed, and the main area displays the 'Profiles' list. The 'jaga' profile is selected, showing its details: User License is set to 'Salesforce Platform' and 'Custom' is checked. Other profiles listed include 'Analytics Cloud Integration User'. The interface includes standard Salesforce navigation elements like 'Search Setup' and various tabs.

Step 5:

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

Users | Salesforce + - X

kot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Cloud Setup Home Object Manager

Search Setup

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	Chatter Expert	Chatter	chatty_00050000c8joseaf_6x19blcked4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	Grey_Jane	jgzy	jane_grey@gnimmoalm.cz7d2kooyt3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
Edit	S_Jaga	JS	jaga09@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
Edit	S_Jagadesh	JS	w0w@gmail.com	SE Admin	<input checked="" type="checkbox"/>	System Administrator
Edit	S_Jagadesh	JS	jaga117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
Edit	User_Integration	Integ	integration@000500000c8joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightsecurity@000500000c8joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

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

25°C Partly sunny Search Cloud Setup Home Object Manager Help for this Page

ENG IN 08:22 AM 01-10-2023

Users | Salesforce + - X

kot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FreURL%3D%252F005%253FisUserEntityOverride%253D1%2526retURL%...

Cloud Setup Home Object Manager

Search Setup

Users

New User

User Edit

General Information

First Name: Jegadesh11
Last Name: S
Email: jwr123@gmail.com
Username: jwr123@gmail.com
Nickname: User169612875144962592
Title:
Company:
Department:
Division:

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

Save Save & New Cancel

25°C Partly sunny Search Cloud Setup Home Object Manager Help for this Page

ENG IN 08:23 AM 01-10-2023

Users | Salesforce + - X

kot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3fappLayout%3Dsetup%26retURL%3D%252F005%253FisUserEntityOverride%253D1%2526retURL%...

Cloud Setup Home Object Manager

Search Setup

Users

New User

User Edit

General Information

First Name: Jegadesh22
Last Name: S
Alias: JS
Email: jaa1@gmail.com
Username: jaa1@gmail.com
Nickname: User169612079983618745
Title:
Company:
Department:
Division:

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

Save Save & New Cancel

25°C Partly sunny Search Cloud Setup Home Object Manager Help for this Page

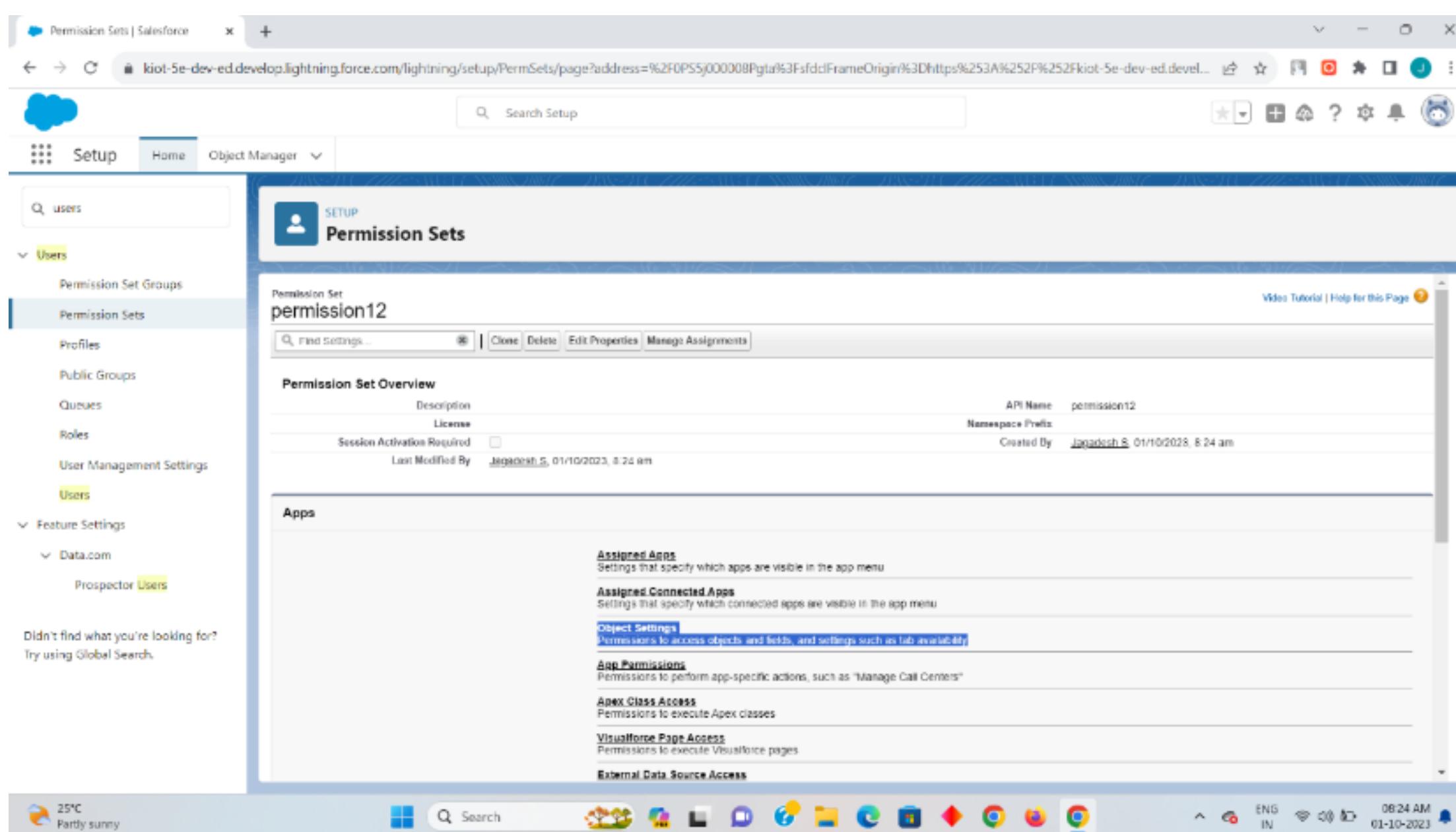
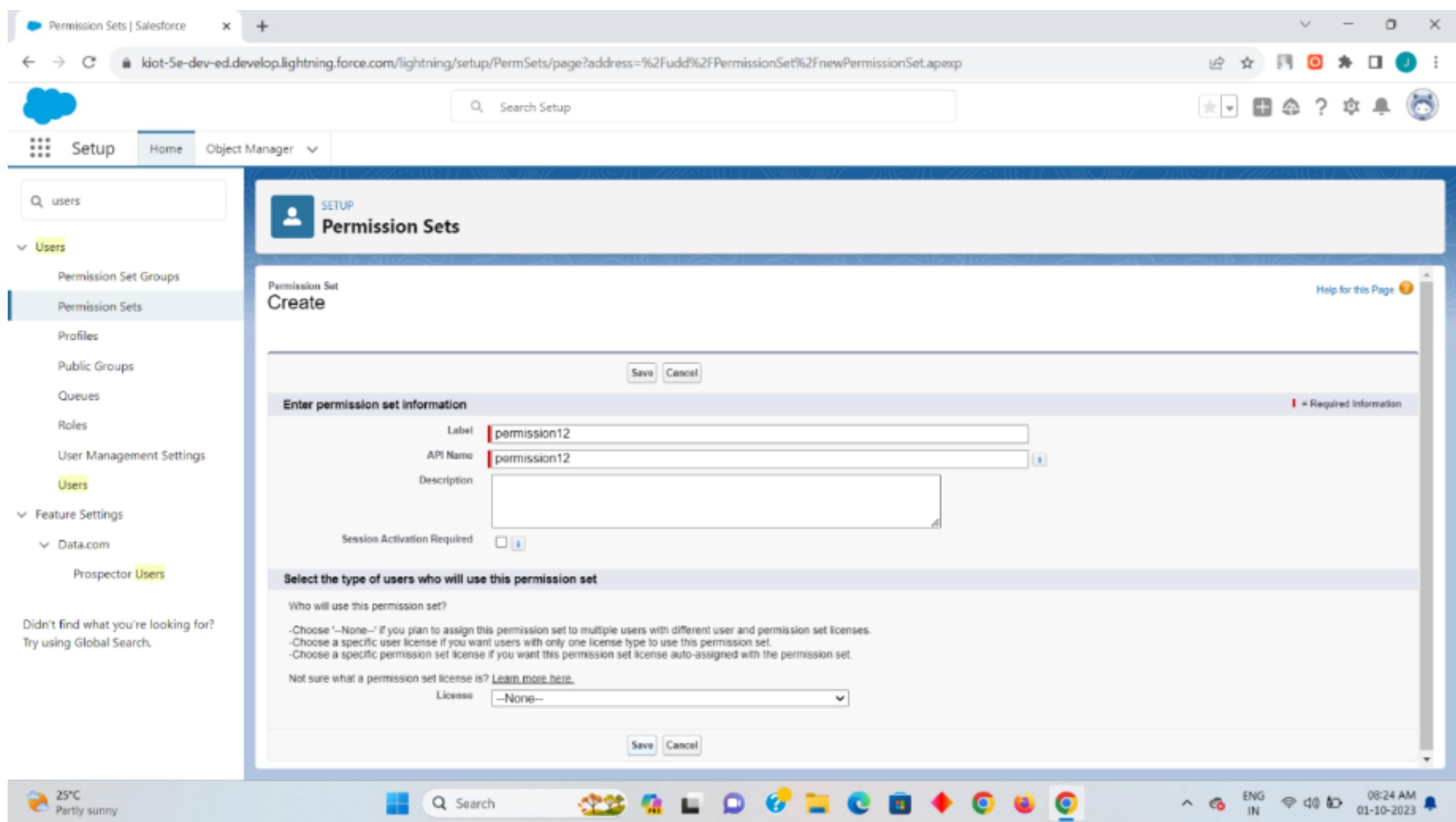
ENG IN 08:23 AM 01-10-2023

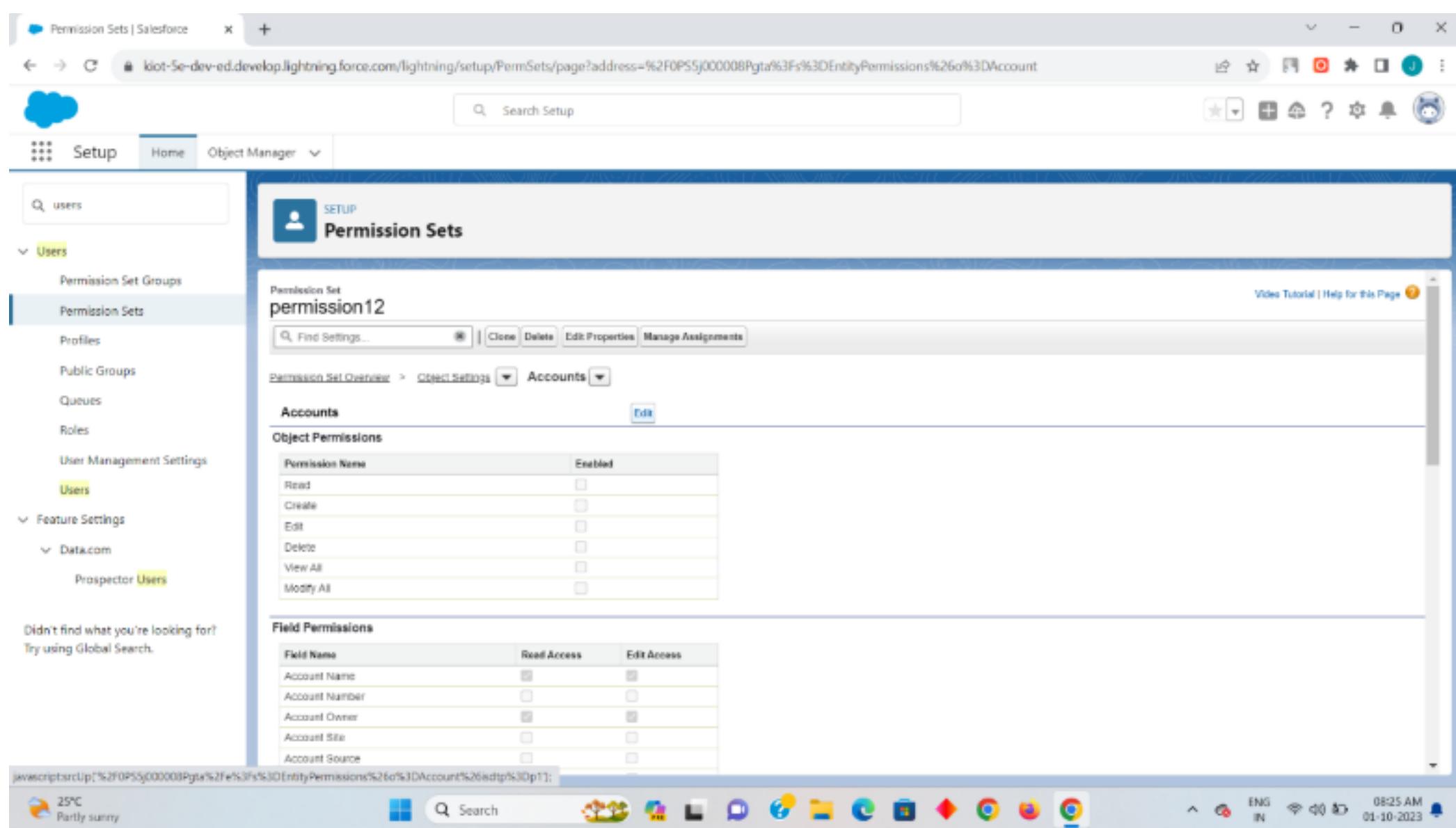
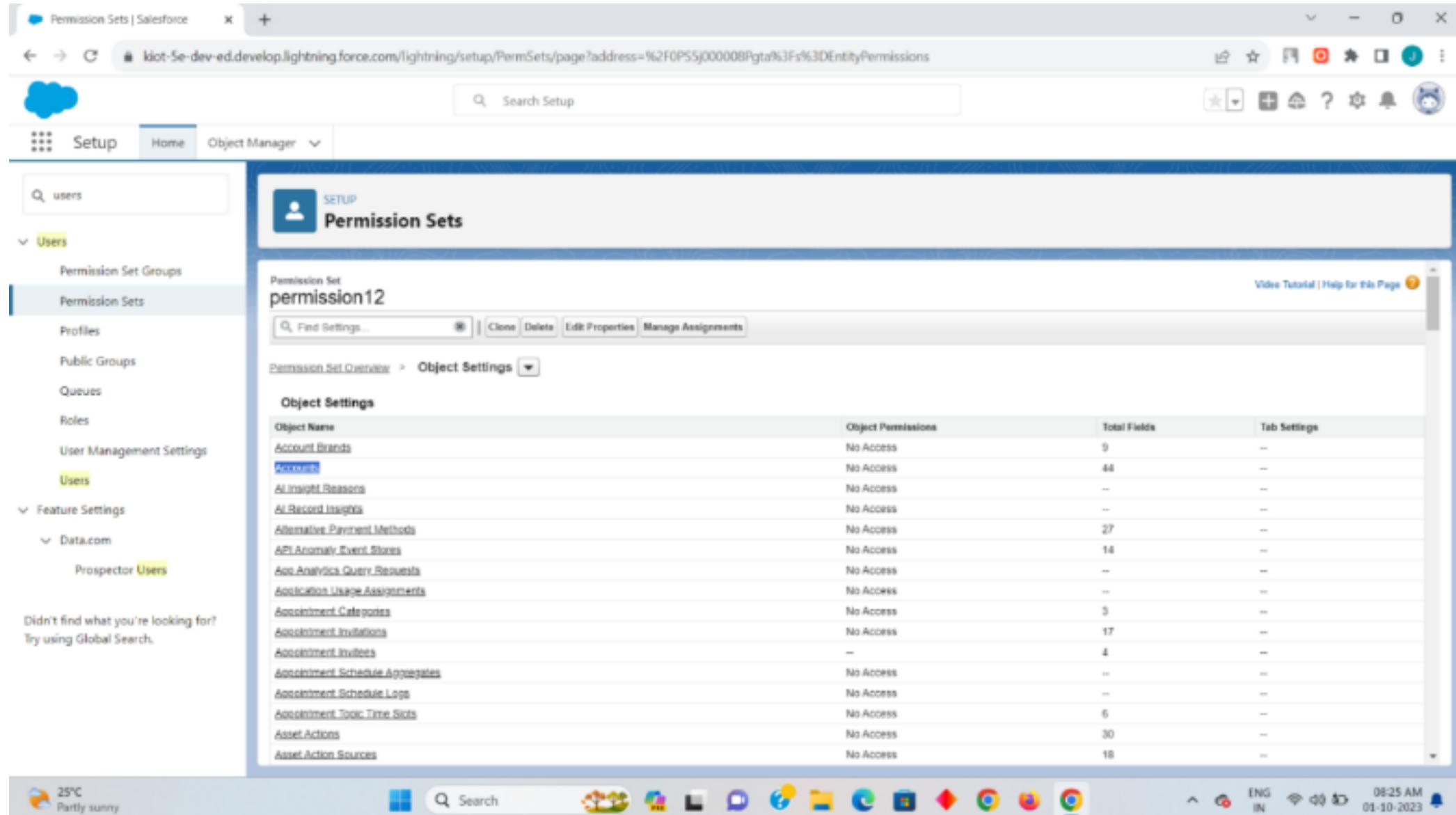
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

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.





Step 7:

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

The screenshots show the Salesforce Setup interface for managing Permission Sets. In the first screenshot, the 'Accounts' object settings are displayed, showing various permission levels for different actions. In the second screenshot, after clicking the 'Edit' button, the 'Delete' permission is specifically selected, indicating it is being modified.

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.

Permission Sets | Salesforce

kot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/0PS5j000008PgtA/PermissionSetAssignment/home

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

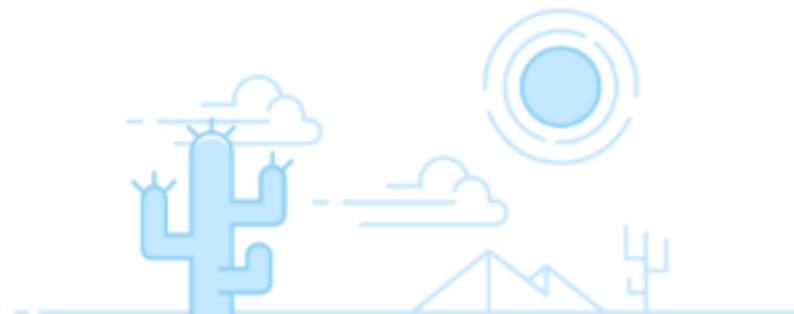
Users

Feature Settings

Data.com

Prospector Users

No assignments defined.



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

Permission Sets | Salesforce

kot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/0PS5j000008PgtA/PermissionSetAssignment/new

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Select Users to Assign

All Users

Full Name	Alias	Username	Role	Active	Profile
Jagadesh S	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
Jagadesh S	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
Jagadesh11 S	ji	jw123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
Jagadesh22 S	js	ja1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

Cancel Next

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

Permission Sets | Salesforce

kot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/0PS5j000008PgtA/PermissionSetAssignment/new

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Select Users to Assign

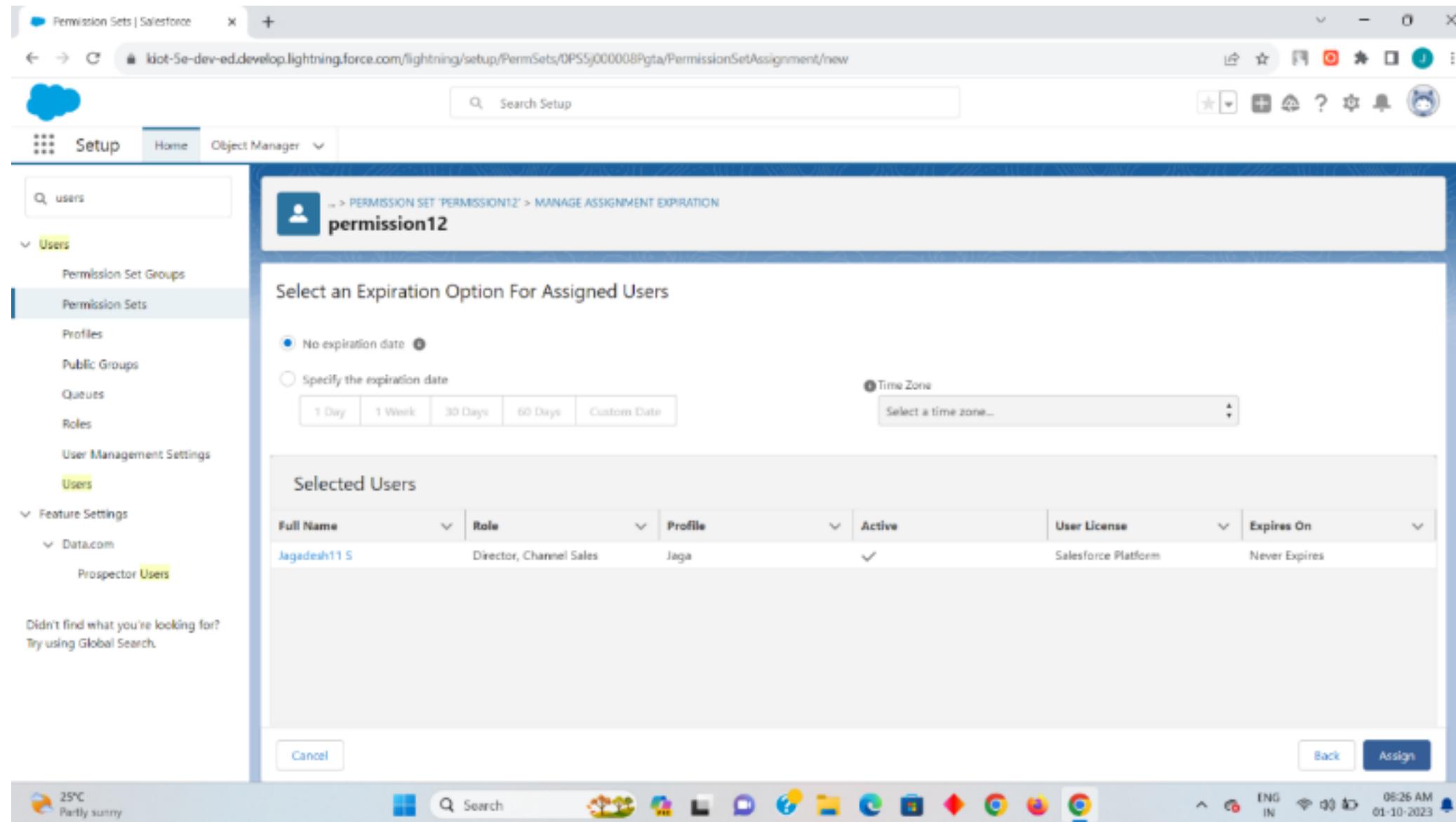
All Users

Full Name	Alias	Username	Role	Active	Profile
Jagadesh S	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
Jagadesh S	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/> Jagadesh11 S	ji	jw123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
Jagadesh22 S	js	ja1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

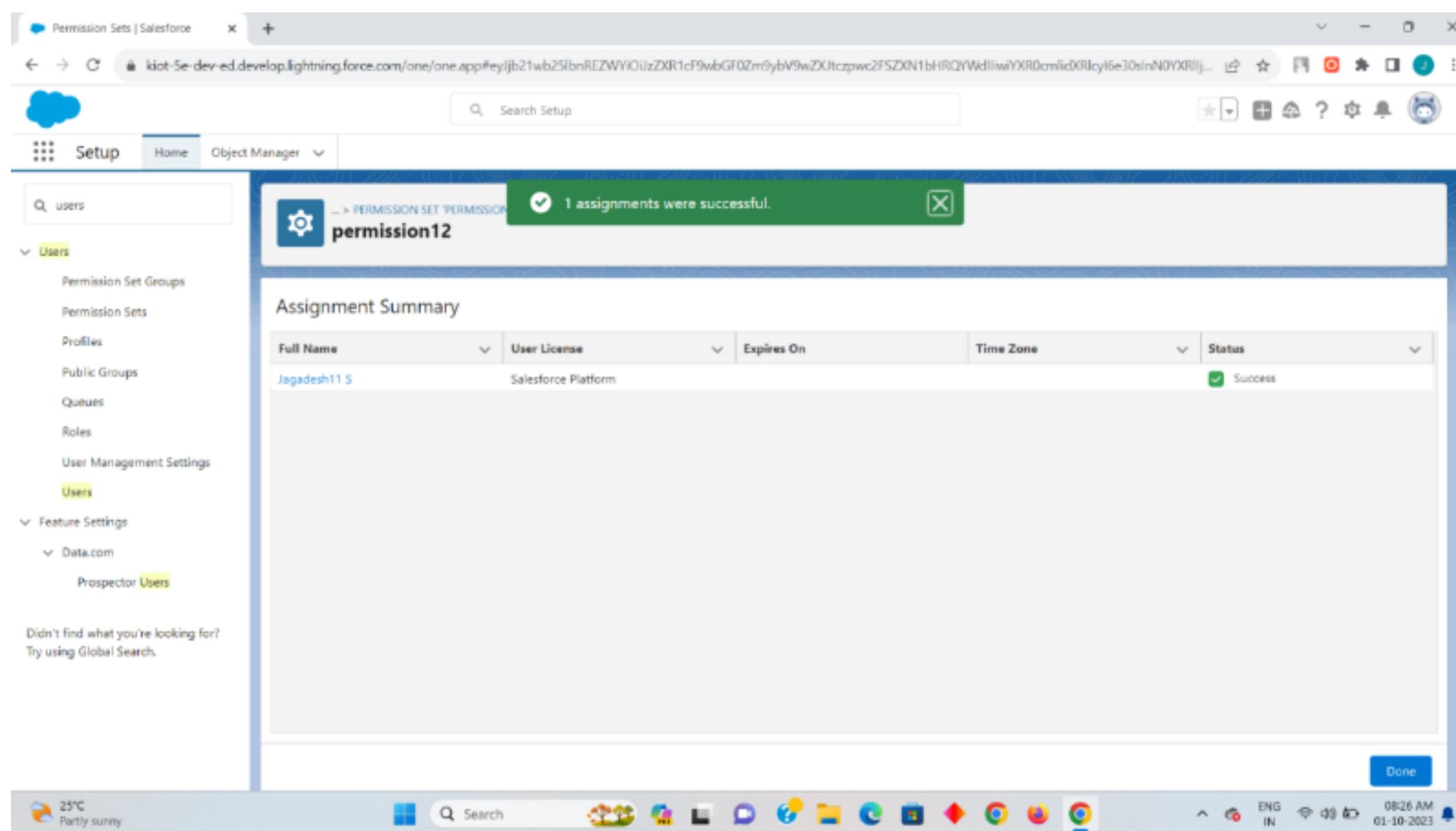
Cancel Next

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

Click on next.



Now click on Assign.



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

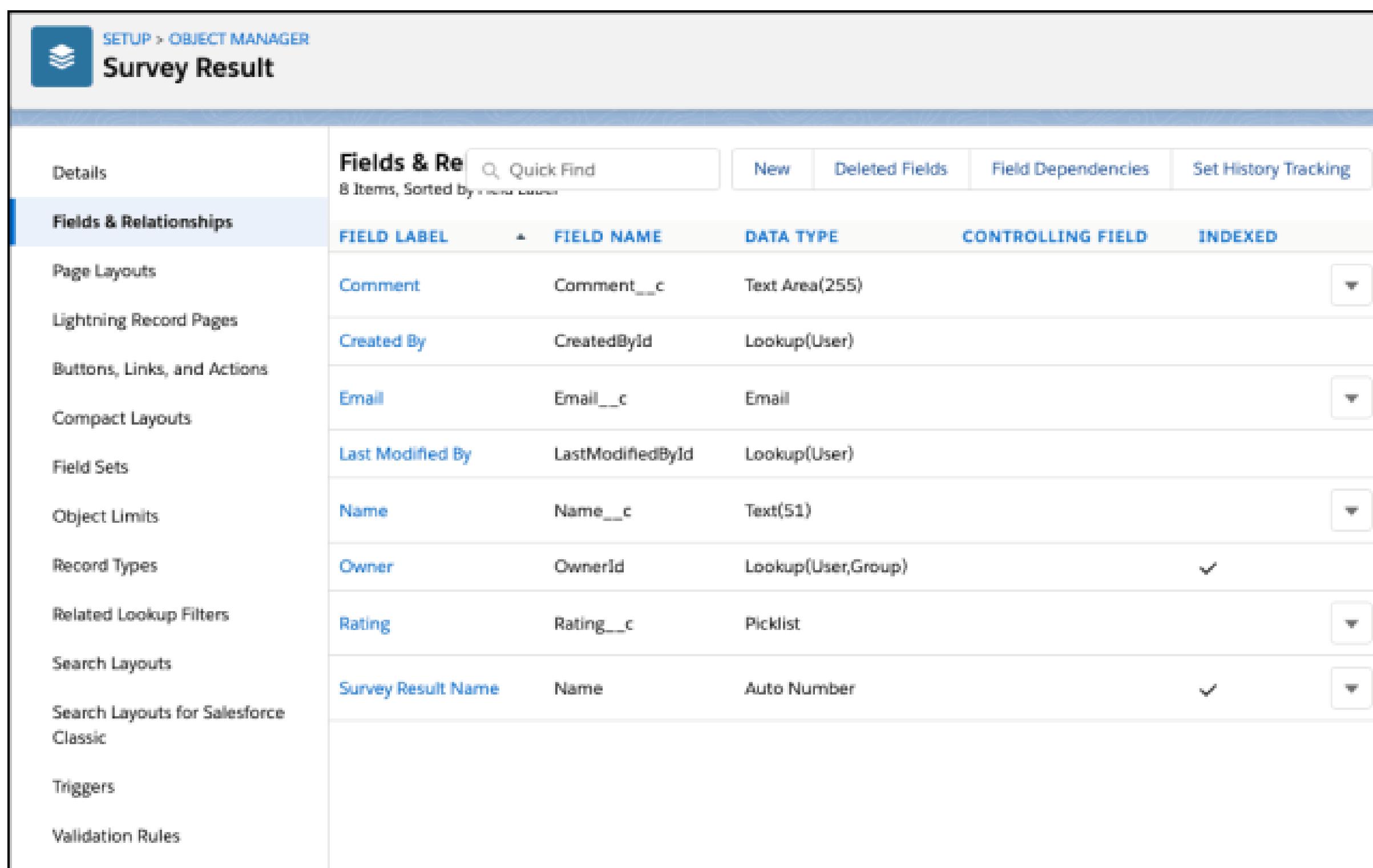
4.Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

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

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

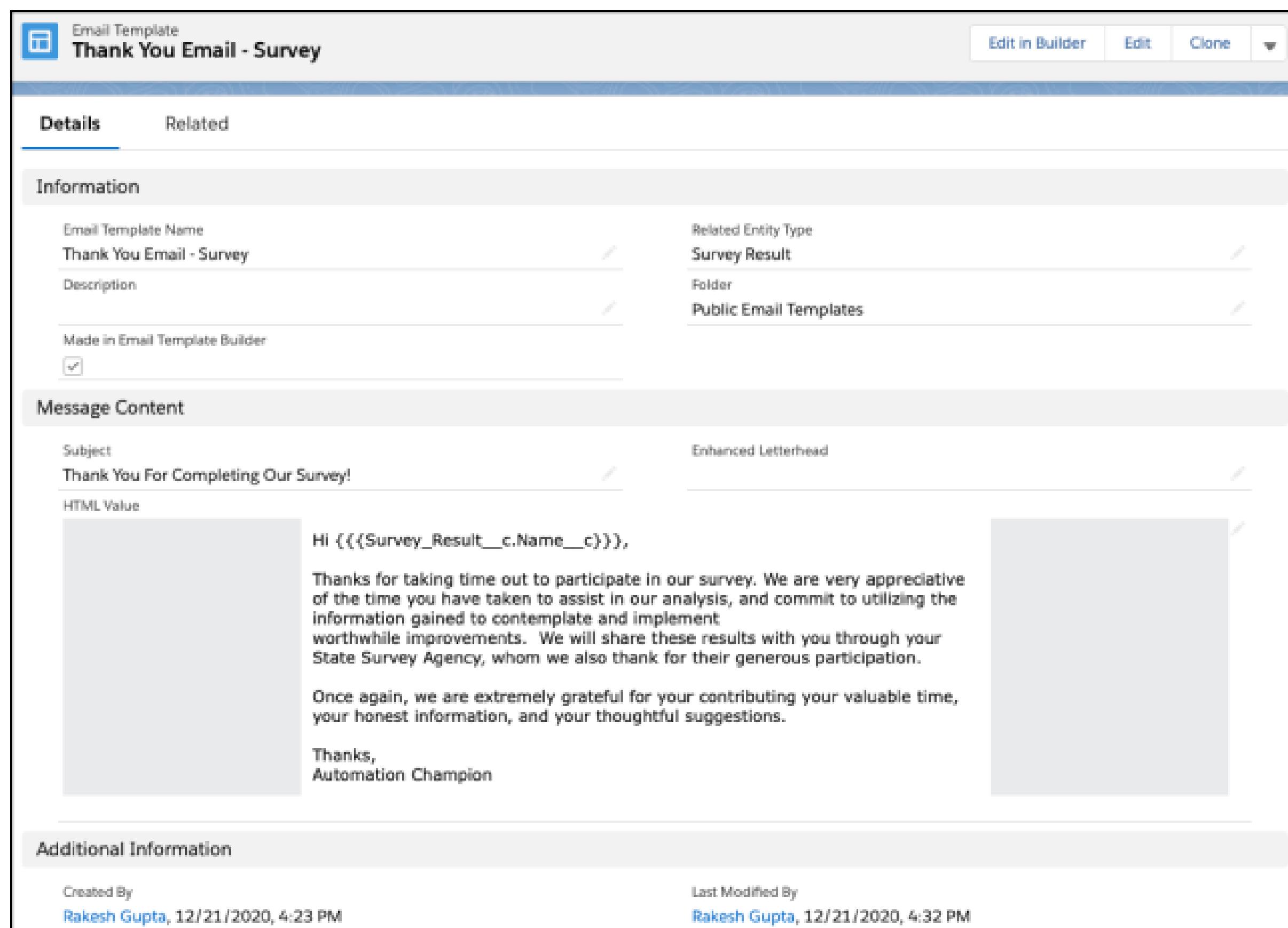


The screenshot shows the Salesforce Object Manager interface for creating a custom object named "Survey Result". The left sidebar lists various object categories like Page Layouts, Lightning Record Pages, etc. The main area displays the "Fields & Relationships" section for the Survey Result object. It includes a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains the following data:

	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.



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**.

The screenshot shows the 'Edit Email Alert' page for 'Survey - Thank You Email'. The 'Description' field contains 'Survey - Thank You Email'. The 'Unique Name' field is set to 'Survey_Thank_You_Email'. The 'Object' is 'Survey Result'. The 'Email Template' is 'Thank You Email - Survey'. The 'Protected Component' checkbox is unchecked. Under 'Recipient Type', there is a search bar with 'User' and a 'Find' button. The 'Recipients' section has two panels: 'Available Recipients' (listing 'User: Integration User', 'User: Rakesh Gupta', and 'User: Security User') and 'Selected Recipients' (listing 'Email Field: Email'). Below these are buttons for 'Add' and 'Remove'. A note says 'You can enter up to five (5) email addresses to be notified.' Under 'Additional Emails', there is a large text input field. At the bottom, 'From Email Address' is set to 'Current User's email address'. A checkbox 'Make this address the default From email address for this object's email alerts.' is unchecked. At the bottom right are 'Save', 'Save & New', and 'Cancel' buttons.

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 *API Name

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

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text" value="A_a Comment X"/>
Email__c	<input type="text" value="A_a Email > Value X"/>
Name__c	<input type="text" value="({!Name.firstName} {!Name.lastName})"/>
Rating__c	<input type="text" value="A_a Rating X"/>

+ Add Field

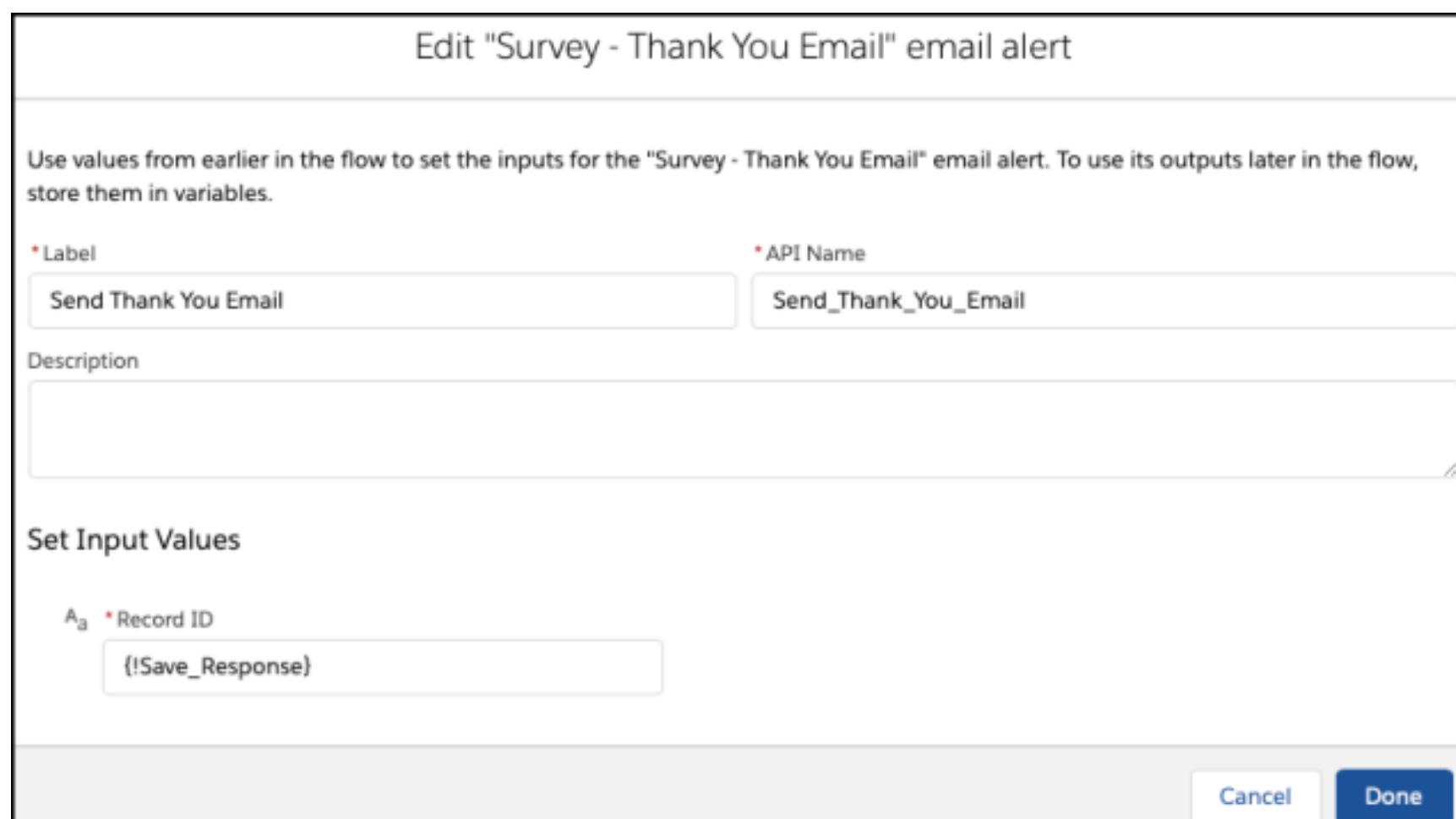
Manually assign variables

Cancel **Done**

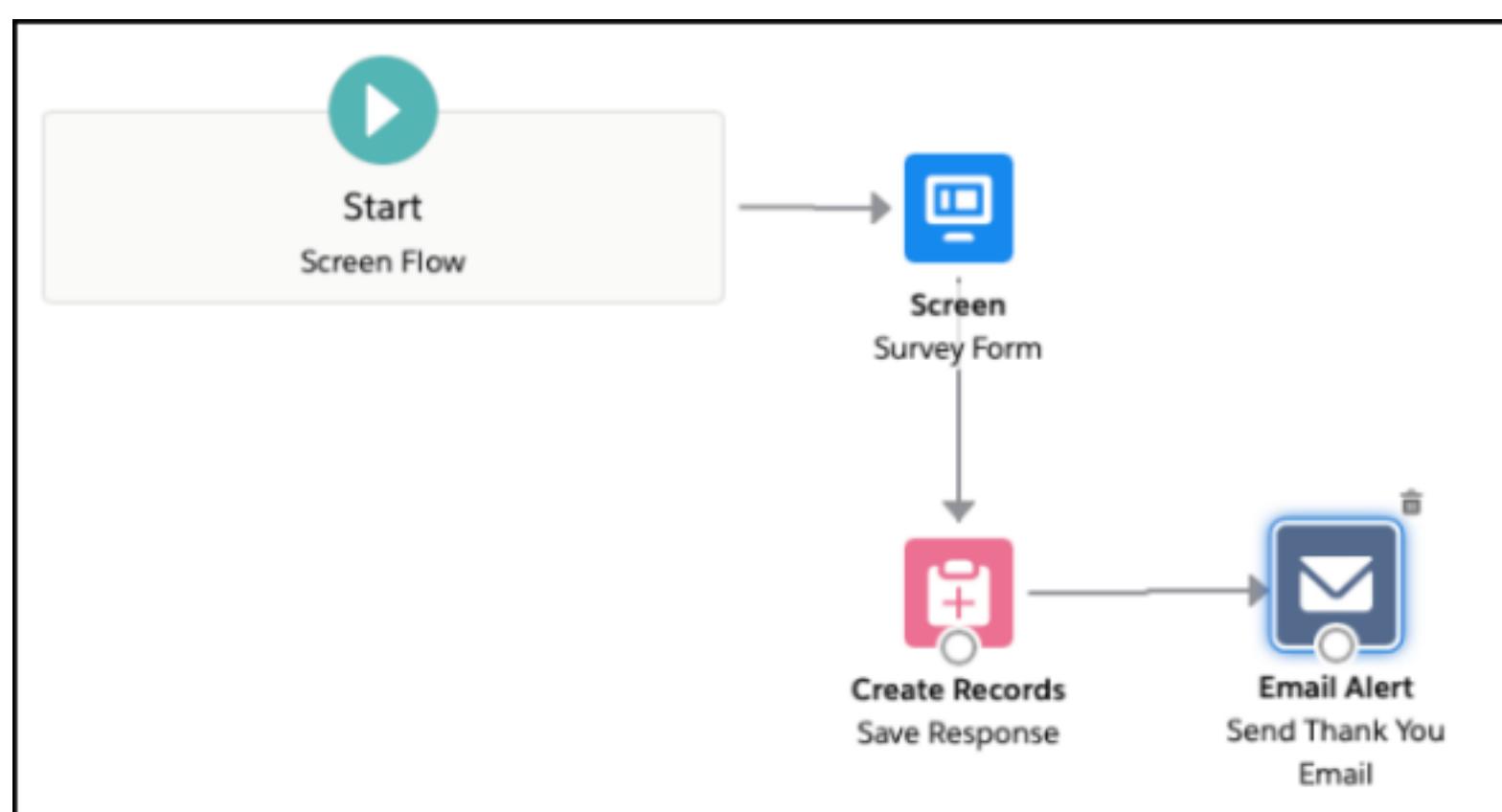
Step 4.3: Salesforce Flow – Call an Action – Email Alert to Send Out Thank You Email

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 i

User or System Context—Depends on How Flow is Launched

* Type

Screen Flow

* API Version for Running the Flow

51

Interview Label i

Insert a resource...



Survey {!\$Flow.CurrentDateTime}

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

2

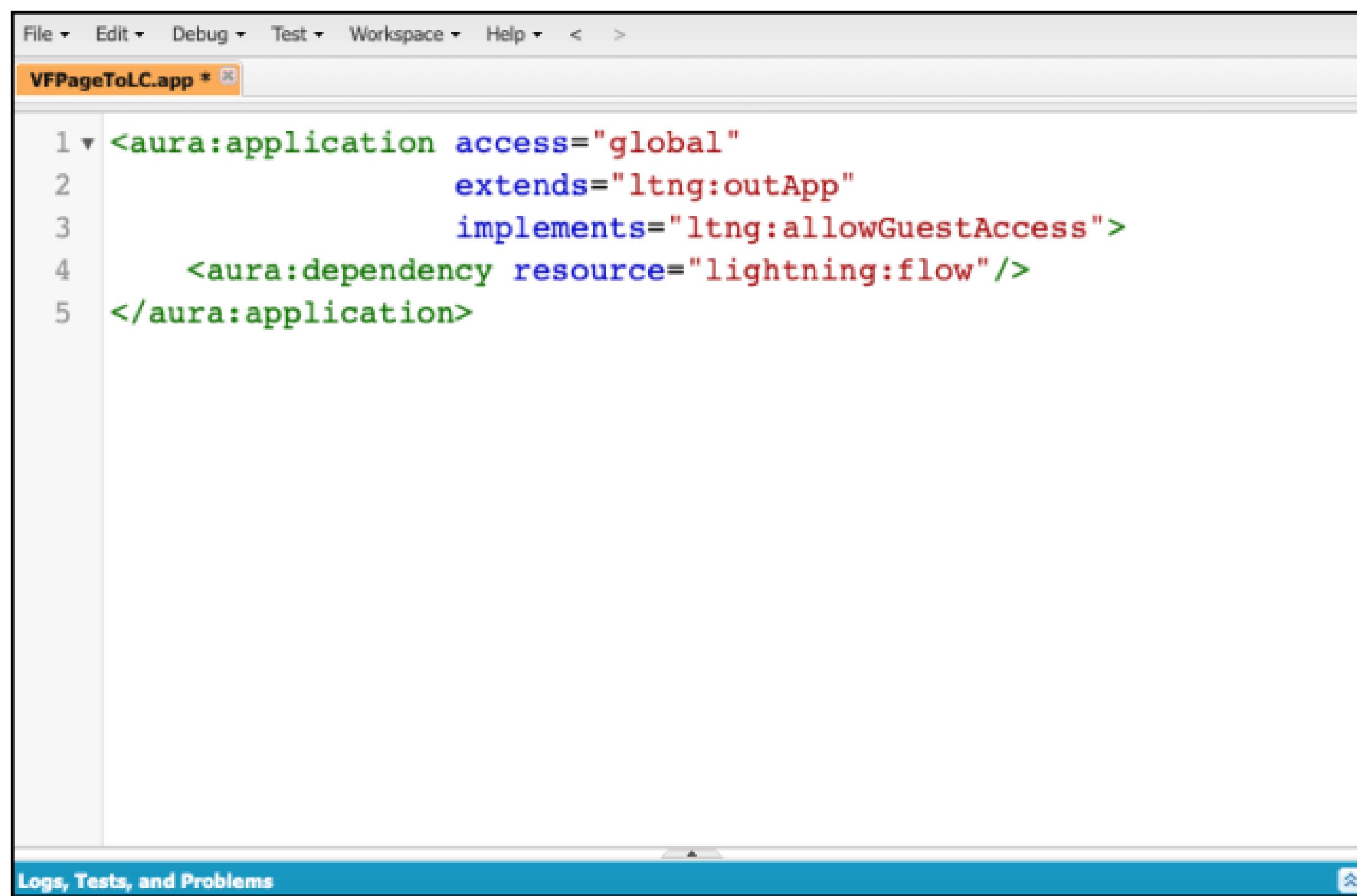
[Cancel](#)

[Save](#)

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

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

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



The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and tabs for < >. Below the navigation is a tab bar with 'VFPPageToLC.app *'. The main area contains the following code:

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

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

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

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

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

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

The screenshot shows the 'Visualforce Page Survey' editor. At the top, there's a toolbar with 'Save', 'Quick Save', 'Cancel', 'Where is this used?', 'Component Reference', and 'Preview'. Below the toolbar is a 'Page Information' section with fields for 'Label' (Survey), 'Name' (Survey), and 'Description'. It also includes checkboxes for 'Available for Lightning Experience, Experience Builder sites, and the mobile app' (checked) and 'Require CSRF protection on GET requests' (unchecked). The main area is titled 'Visualforce Markup' and contains the following code:

```

1 <apex:page showheader="false" lightningStylesheets="true">
2 <html>
3   <head>
4     <apex:includeLightning />
5     <!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualf
6   </head>
7   <body class="slds-scope">
8     <div id="flowContainer" />
9     <script>
10    var statusChange = function (event) {
11      if(event.getParam("status") === "FINISHED") {
12        var outputVariables = event.getParam("outputVariables");
13        var key;
14        for(key in outputVariables) {
15          if(outputVariables[key].name === "myOutput") {
16            ...
17          }
18        }
19      }
20    };
21    $Lightning.use("c:VPPageToLC", function() {
22      $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
23        "flowContainer",
24        function (component) {
25          component.startFlow("Survey");
26        }
27      );
28    });
29  </script>
30 </body>

```

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

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

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

Site Edit

Save Cancel

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

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

Proof of Concept

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

Survey

Name	<input type="text"/>
First Name	<input type="text"/> Alok
Last Name	<input type="text"/> Sinhal
*Email	<input type="text"/>
*Rating	5
*Comment	<input type="text"/> Awesome Blog
Next	

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

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



Survey Site Guest User [via b|9amq6fe7r.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

 [Reply](#)

 [Forward](#)