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Salesforce
Developer(Course)
Assignment no 1

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

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 'Object Manager' tab selected. The main title is 'New Custom Object'. A message bar at the top indicates that permissions are disabled by default and provides links to enable them or learn more.

Custom Object Definition Edit

Custom Object Information

- Label: college (Example: Account)
- Plural Label: colleges (Example: Accounts)
- Starts with vowel sound:
- The Object Name is used when referencing the object via the API.
- Object Name: college (Example: Account)
- Description: (Empty text area)
- Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window (selected)
- Content Name: None

Enter Record Name Label and Format

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

- Record Name: college Name (Example: Account Name)
- Data Type: Text

Optional Features

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

Object Classification

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

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

Deployment Status

What is this?

- 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

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A message at the top indicates that permissions for the new object are disabled by default. The 'Custom Object Definition Edit' page is displayed, with the 'Custom Object Information' section containing fields for Label ('department'), Plural Label ('departments'), and Object Name ('department'). Other sections include 'Enter Record Name Label and Format', 'Optional Features', 'Object Classification', 'Deployment Status', 'Search Status', and 'Object Creation Options'. Buttons for Save, Save & New, and Cancel are at the bottom.

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.

Object Manager

CDepartment

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

Object Manager

CDepartment

New Relationship

Step 3 of 6

Field Label: [?](#)

Field Name: [?](#)

Description:

Help Text:

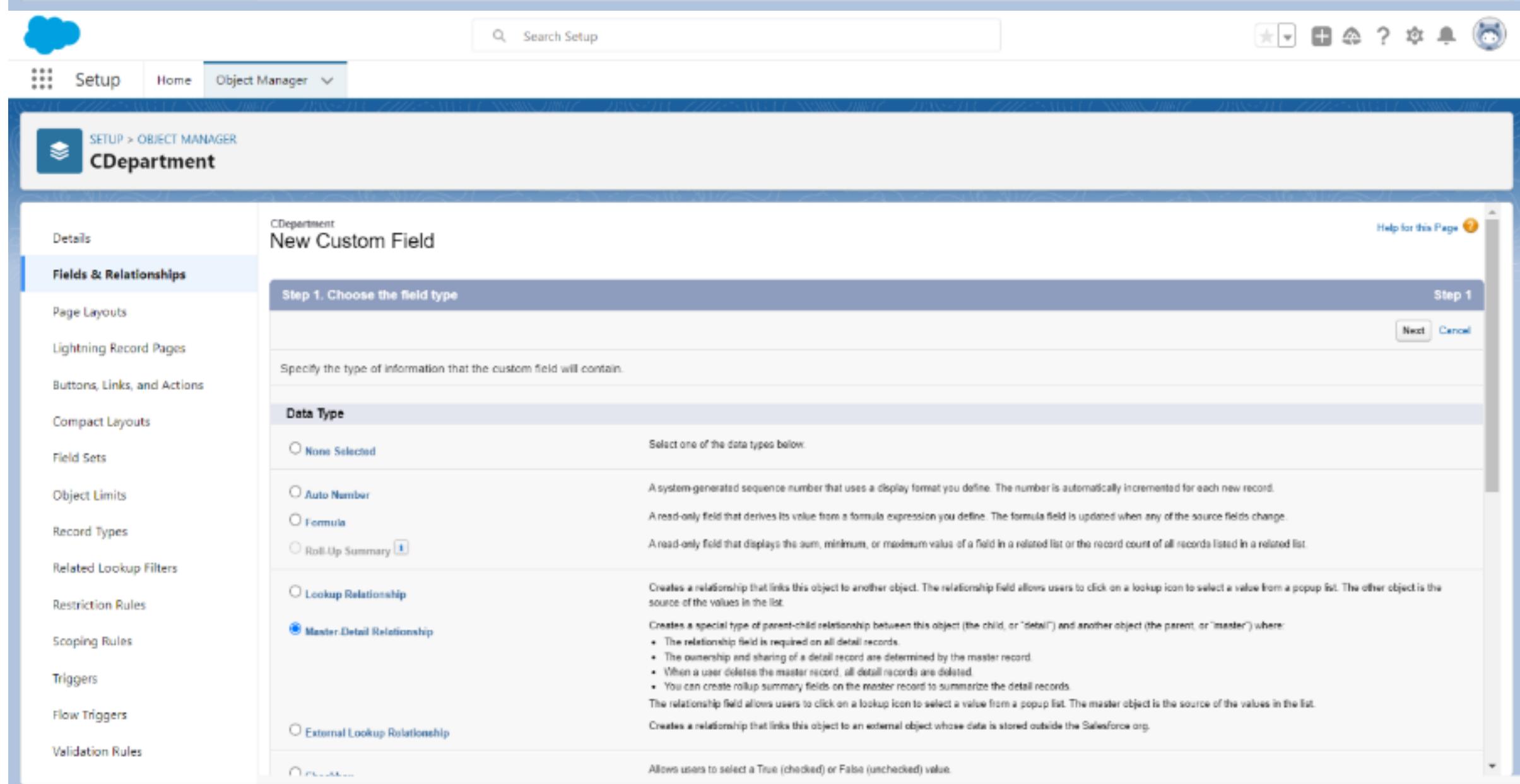
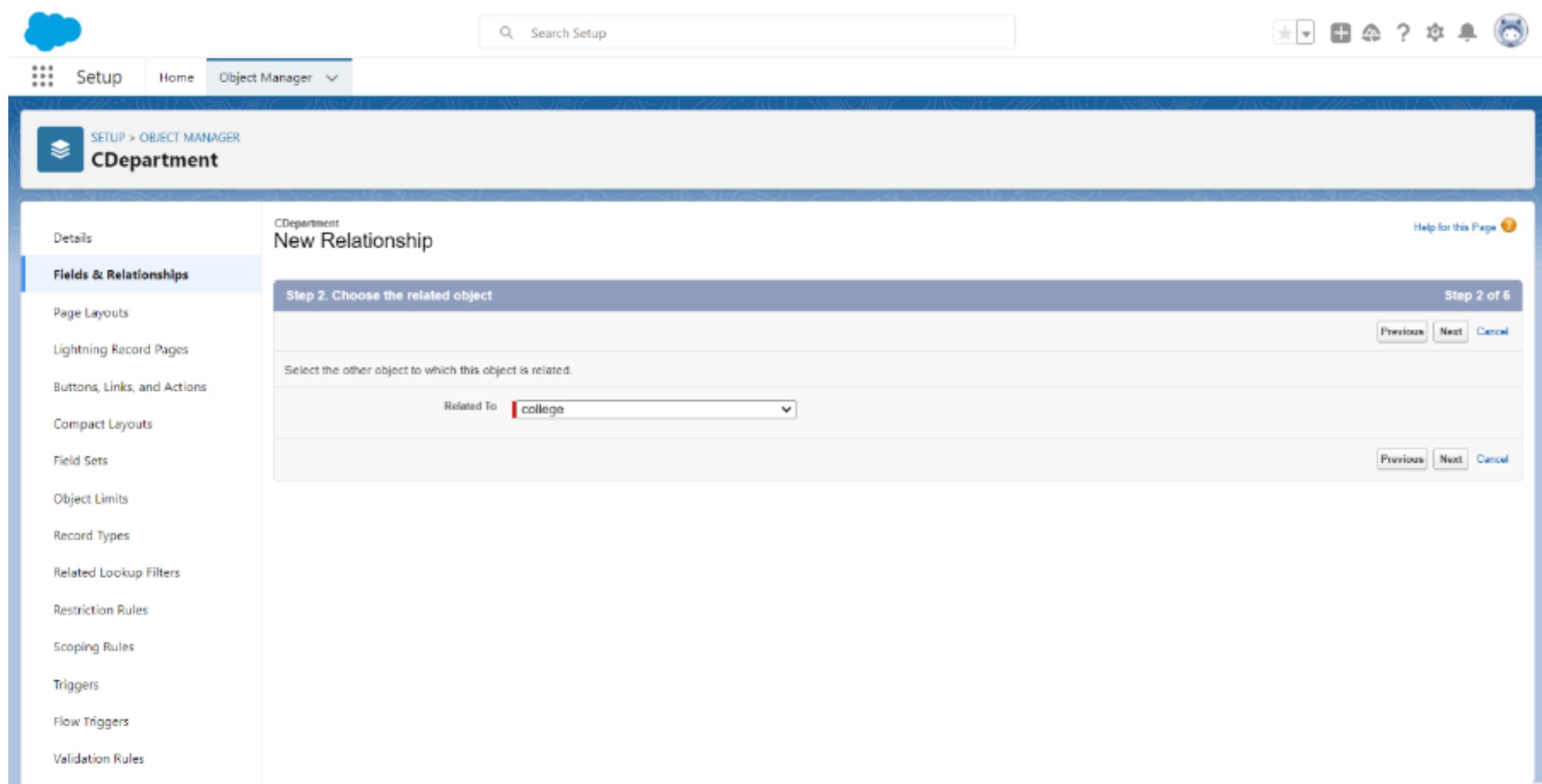
Child Relationship Name: [?](#)

Sharing Setting:

- Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
- ReadWrite: Allows users with at least ReadWrite access to the Master record to create, edit, or delete related Detail records.

Allow reparenting:

Auto add to custom report type: Add this field to existing custom report types that contain this entity [?](#)



Step 3: Create the Roll-Up Summary Field

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

1. Still on the "College_C" settings, go to "Fields & Relationships."

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'CDepartment'. On the left, a sidebar lists various setup categories under 'Fields & Relationships'. The main content area displays the 'Fields & Relationships' section for the CDepartment object, listing four items: 'college' (Master-Detail), 'Created By' (Lookup), 'Department Name' (Text), and 'Last Modified By' (Lookup). A table provides detailed information for each field.

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

The screenshot shows the Salesforce Tabs setup page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Tabs'. The left sidebar shows 'User Interface' selected, with 'Tabs' highlighted. The main content area is titled 'Custom Tabs' and contains a table for 'Custom Object Tabs' and sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section includes 'New' and 'What Is This?' buttons.

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

Salesforce Setup - Object Manager

college

New Custom Field

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.

Help for this Page

Previous Save & New Save Cancel

Salesforce Setup - Object Manager

college

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"/>	✓
Analytics Cloud Security User	<input checked="" type="checkbox"/>	✓
Cloud Kicks Admin	<input checked="" type="checkbox"/>	✓
Contract Manager	<input checked="" type="checkbox"/>	✓
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	✓
Custom: Marketing Profile	<input checked="" type="checkbox"/>	✓
Custom: Sales Profile	<input checked="" type="checkbox"/>	✓
Custom: Support Profile	<input checked="" type="checkbox"/>	✓
customer	<input checked="" type="checkbox"/>	✓
Force.com - Ann Subscription User	<input checked="" type="checkbox"/>	✓

Help for this Page

Previous Next Cancel

Setup > Object Manager college

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

Help for this Page

Previous Next Cancel

Setup > Object Manager college

New Custom Field

Step 2 of 5

Enter the details

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

Add this field to existing custom report types that contain this entity

Help for this Page

Previous Next Cancel

New Custom Field

Step 1. Choose the field type

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

Data Type	Description
<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> 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.
<input checked="" type="radio"/> 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.
<input type="radio"/> 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.
<input type="radio"/> 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: <ul style="list-style-type: none"> The relationship field is required on all detail records. The ownership and sharing of a detail record are determined by the master record. When a user deletes the master record, all detail records are deleted. You can create rollup summary fields on the master record to summarize the detail records. The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
<input type="radio"/> Boolean	Allows users to select a True (checked) or False (unchecked) value.

Fields & Relationships
4 Items, Sorted by Field Label

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

Step 4: Create a Lightning App

1. Type and select "App Manager."
2. Click "New Lightning App."
3. Fill in basic information (Name, Developer Name, Description).

- 4. Choose the App Type (Standard, Console, Custom).**
- 5. Customize the Logo and Colour Scheme.**
- 6. Configure Navigation Items (objects to appear in the app's menu).**
- 7. Set the App Visibility (default access).**
- 8. Optionally, choose Record Pages (Lightning Record Pages).**
- 9. Review and Save the app.**
- 10. Assign the app to users or profiles.**
- 11. Test the app with the assigned users.**

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The left sidebar has sections for 'User Interface' (selected), 'Rename Tabs and Labels', and 'Tabs'. A message at the top says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'New Custom Object Tab' and 'Step 2. Add to Profiles'. It displays a table where profiles are listed on the left and tab visibility is set on the right. The 'Tab Visibility' column contains dropdown menus, all of which are currently set to 'Default On'. The table has two columns: 'Profile' and 'Tab Visibility'.

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

Step 2 of 3

Help for this Page ?

Previous Next Cancel

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 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

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

Step 3. Add to Custom Apps Step 3 of 3

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

Custom App	Include Tab
Platform (standard_Platform)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>
Content (standard_Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>
Sales (standard_LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard_QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard_DataManager)	<input checked="" type="checkbox"/>
Bolt Solutions (standard_LightningBot)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

Previous Save Cancel

Setup Home Object Manager

Search Setup

User Interface Rename Tabs and Labels Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

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

Object: CDepartment

Tab Style: Lightning

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

Splash Page Custom Link: None

Description:

Next Cancel

Setup Home Object Manager

Search Setup

app Salesforce Mobile App Data Mass Transfer Approval Requests

App App Manager AppExchange Marketplace Connected Apps Connected Apps Cloud Usage Manage Connected Apps

Lightning Roll How Category Lightning Roll Columns

Mobile Apps Salesforce Salesforce Branding Salesforce Navigation Salesforce Notifications Salesforce Office Salesforce Settings

Packaging Installed Packages

SETUP Lightning Experience App Manager

new Lightning App new Connected App

10 items • Sorted by App Name • Filtered by All appmanagers - select type

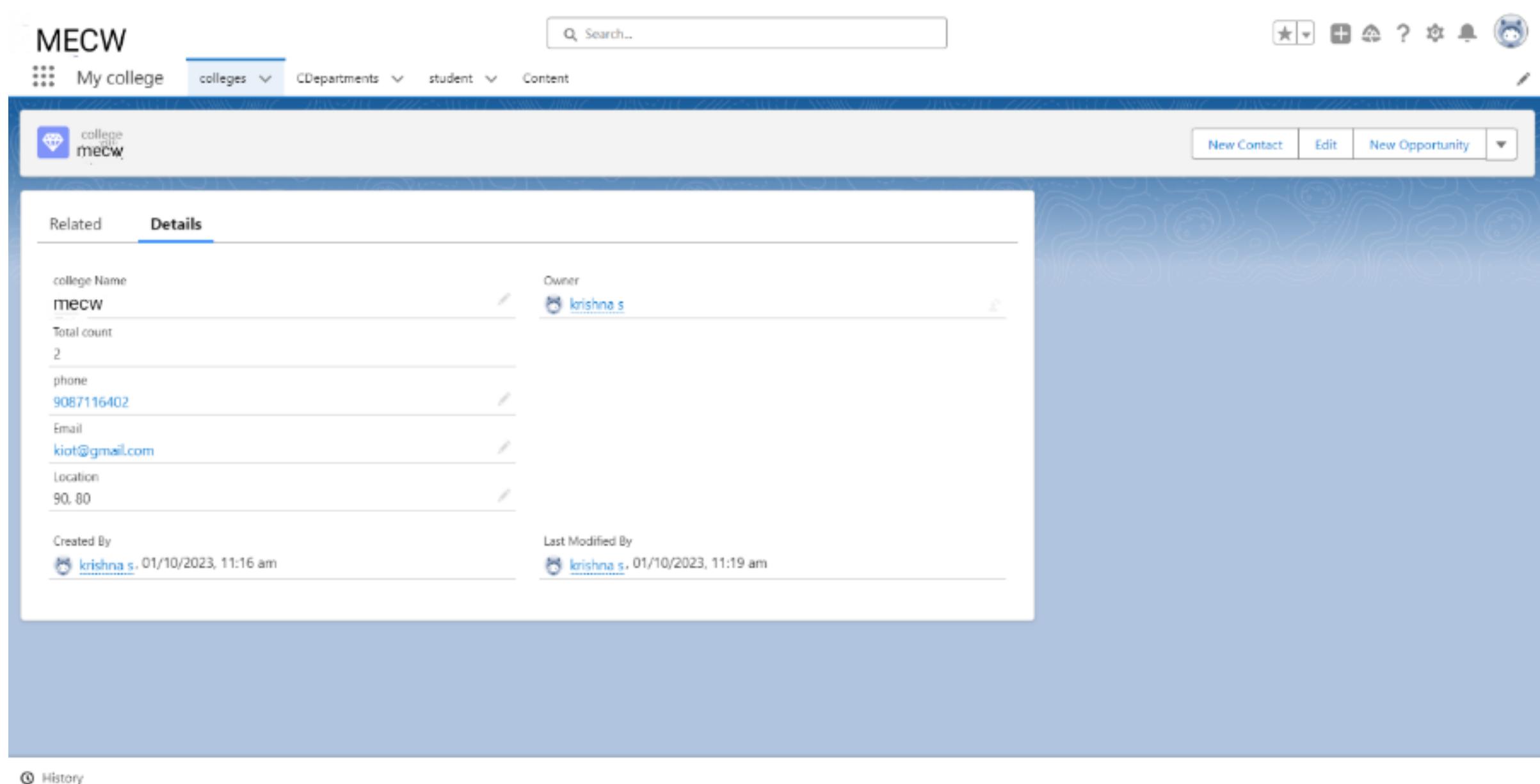
App Name	Developer Name	Description	Last Modified Date	App Type	Visible
All Tabs	AllTabAnd		14/07/2022, 10:47 am	Classic	
Analytics Studio	Insights	Built CRM Analytics dashboards and apps	14/07/2022, 10:47 am	Classic	
App Launcher	app_launcher	App Launcher tabs	14/07/2022, 10:47 am	Classic	
Build Solutions	LightningBuild	Discover and manage business solutions designed for your industry.	14/07/2022, 10:47 am	Lightning	
Community	Community	Salesforce CRM Communities	14/07/2022, 10:47 am	Classic	
Content	Content	Salesforce Content Management	14/07/2022, 10:47 am	Classic	
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	14/07/2022, 10:47 am	Lightning	
Digital Experiences	SalesforceDX	Manage content and media for all of your sites.	14/07/2022, 10:47 am	Lightning	
Lightning Usage App	LightningUsage	View adoption and usage metrics for Lightning Experience	14/07/2022, 10:47 am	Lightning	
Marketing	Marketing	Built-in-class on-demand marketing automation	14/07/2022, 10:47 am	Classic	
Platform	Platform	The fundamental Lightning Platform	14/07/2022, 10:47 am	Classic	
Queue Management	QueueManagement	Create and manage queues for your business	14/07/2022, 10:47 am	Lightning	
Sales	Sales	The world's most popular sales force automation (SFA) solution	14/07/2022, 10:47 am	Classic	
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	14/07/2022, 10:47 am	Lightning	
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	14/07/2022, 10:47 am	Lightning	
Sales Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	14/07/2022, 10:47 am	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.

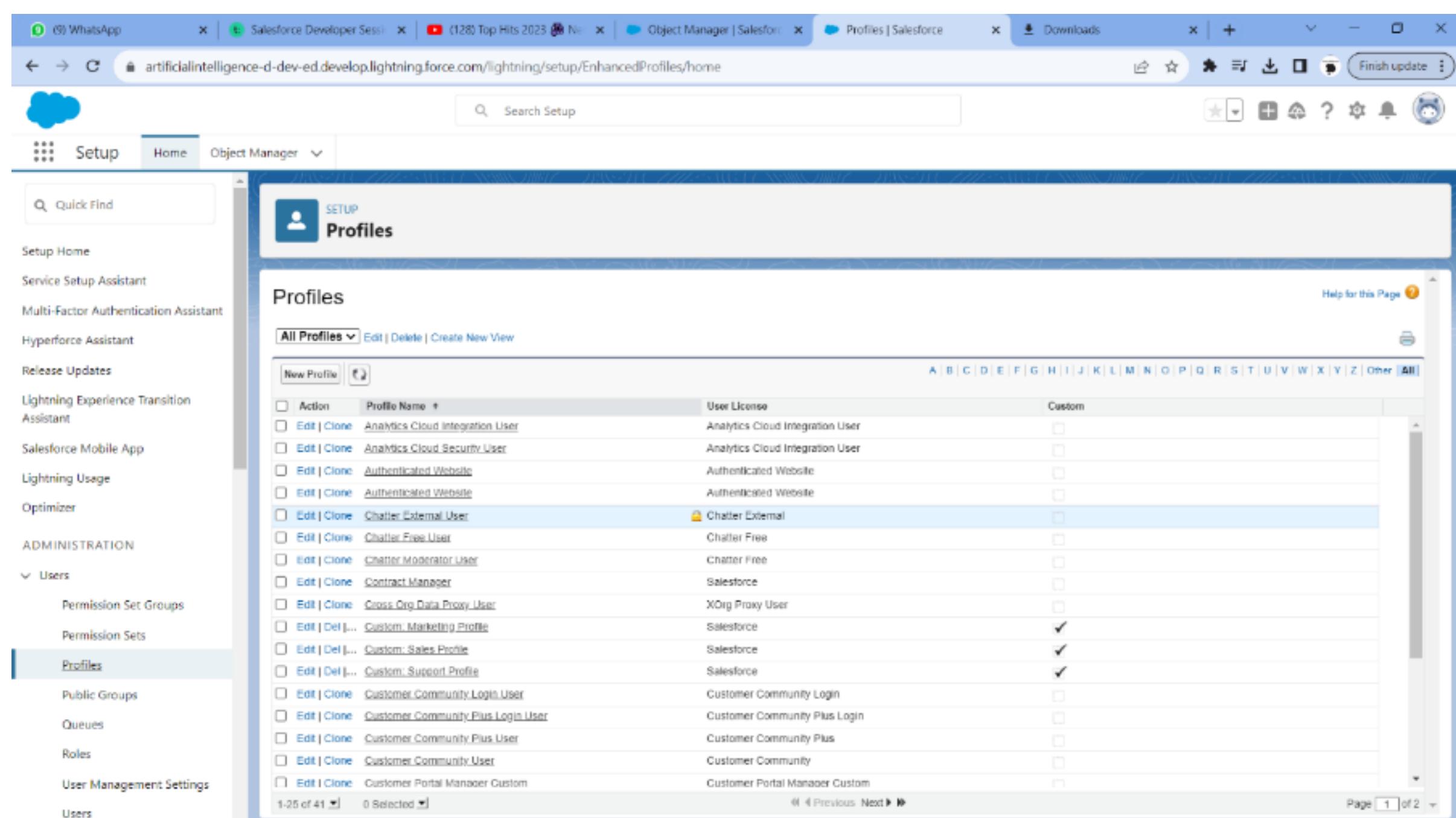
Remember to adjust field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your organization's requirements.



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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main area displays a list of profiles. The 'Profiles' tab is selected in the top navigation bar. The page title is 'Profiles'. Below the title, there's a search bar labeled 'Search Setup'. The main content area shows a table of profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'User License' column includes options like 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External', 'Chatter Free', 'Chatter Moderator', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom Marketing Profile', 'Custom Sales Profile', 'Customer Community Login', 'Customer Community Plus Login', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'Custom' column contains checkboxes, with some checked for certain profiles. At the bottom of the table, there are pagination controls for 'Page 1 of 2'.

The screenshot shows two views of the Salesforce Setup Profiles page. The top view displays a list of profiles with their names and user licenses. The bottom view shows a 'Clone Profile' dialog where a user must select an existing profile to clone from.

Profiles List 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"/>

Clone Profile Dialog:

You must select an existing profile to clone from.

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

Save Cancel

Salesforce Developer Session | lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe... | Profiles | Salesforce | Downloads

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: Manager

Save Cancel

Salesforce Developer Session | lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%3Fsetupid%3DEnhancedProfiles | Profiles | Salesforce | Downloads

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

Profile 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.

Last IP Requested | Enabled Apex Class Access (X) | Enabled Visualforce Page Access (X) | Enabled External Data Source Access (X) | Enabled Named Credential Access (X) | Enabled External Credential Principal Access (X) | Enabled Custom Metadata Type Access (X) | Enabled Custom Setting Definitions Access (X) | Enabled Flow Access (X) | Enabled Service Presence Status Access (X) | Enabled Custom Permissions (X)

Profile Detail

Name	Manager	Custom Profile
User License	Salesforce Platform	✓
Description		
Created By	QODALE, 01/10/2023, 7:09 pm	Modified By QODALE, 01/10/2023, 7:09 pm

Page Layouts

Standard Object Layouts	Global	Opening Hours
Global	Global Layout [View Assignment]	Opening Hours Layout [View Assignment]
Email Application	Not Assigned [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]

Setup Home Object Manager

Profiles

Manager

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

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

Communication Subscription Channel Types

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

Individuals

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

Custom Object Permissions

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

Enhancement Requests

	Basic Access	Create	Edit	Delete	Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Session Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Session Times Out After	2 hours of inactivity	<input type="checkbox"/>				
Session Security Level Required at Login	<input type="checkbox"/> None					

Password Policies

User passwords expire in	90 days
Enforce password history	3 passwords remembered
Minimum password length	8

Salesforce Setup - Profiles

Custom Object Permissions

	Bank	customers
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Comments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in:	90 days
Enforce password history:	3 passwords remembered
Minimum password length:	8
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes

Salesforce Setup - Profiles

Custom Object Permissions

	Bank	customers
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Comments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

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	Adriana Díaz	dardan	test_dava_res_4u@000000csikkeab.com		<input checked="" type="checkbox"/>	LMS User
Edit	Chatter Expert	Chatter	chatty@00d5@000000csikkeab.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit Login	Clinton, Amelia	elli	amelia.elinton.146@xcs@000000csikkeab.com		<input checked="" type="checkbox"/>	Standard Platform User
Edit	S_GOPAL	GS	kotis20@gmail.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	Integ	Integration@00d5@000000csikkeab.com		<input checked="" type="checkbox"/>	Analytics_Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d5@000000csikkeab.com		<input checked="" type="checkbox"/>	Analytics_Cloud Security User

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

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: [] Role: <None Specified>

Last Name: [] User License: Salesforce Integration

Alias: [] Profile: Salesforce API Only System Integrations

Email: [] Active:

Username: [] Marketing User:

Nickname: [] Offline User:

Title: [] Knowledge User:

Company: [] Flow User:

Department: [] Service Cloud User:

Division: [] Site.com Contributor User:

Data.com User Type: -None- 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 - artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FlsUserEntityOv... Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmiya Role: <None Specified>

Last Name: bela User License: Salesforce Platform

Alias: sbela Profile: Manager

Email: 2k20cse179@kiot.ac.in Active:

Username: 2k21it@kiot.ac.in Marketing User:

Nickname: User169616771282564526 Offline User:

Title: worker Knowledge User:

Company: kiot bank Flow User:

Department:

Division:

Data.com User Type: -None- Default Limit (300)

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

The screenshot shows a web browser window with two tabs open:

- Salesforce Developer Session**: This tab displays the Salesforce Setup interface under the "Users" section. It shows the "User Detail" for a user named "sowmya bala". The "Role" is set to "Salesforce Platform Manager". Other details include "Email" (2k21it@kiot.ac.in), "Nickname" (User16951677128296452616), "Title" (worker), and "Company" (kiot bank). The "User License Profile" is also listed as "Manager".
- Gmail**: This tab shows the Gmail inbox. There is one unread email from "support@salesforce.com" with the subject "Welcome to Salesforce!". The email body contains a "Verify Account" button and a URL: <https://artificialintelligence-d-dev-ed-develop.my.salesforce.com>. The message also includes the recipient's username: "2k21it@kiot.ac.in".

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password
***** Good

* Confirm New Password
***** Match

Security Question
In what city were you born?

* Answer
salem

Change Password

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

Login | Salesforce

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

WATCH ON DEMAND

AIDay

© 2023 Salesforce, Inc. All rights reserved.

Recently Viewed | Bank | Sales... x +

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

MECW

mebw - Bank customers Home

Recently Viewed

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

Bank Name ↓

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

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

DISPLAY DENSITY

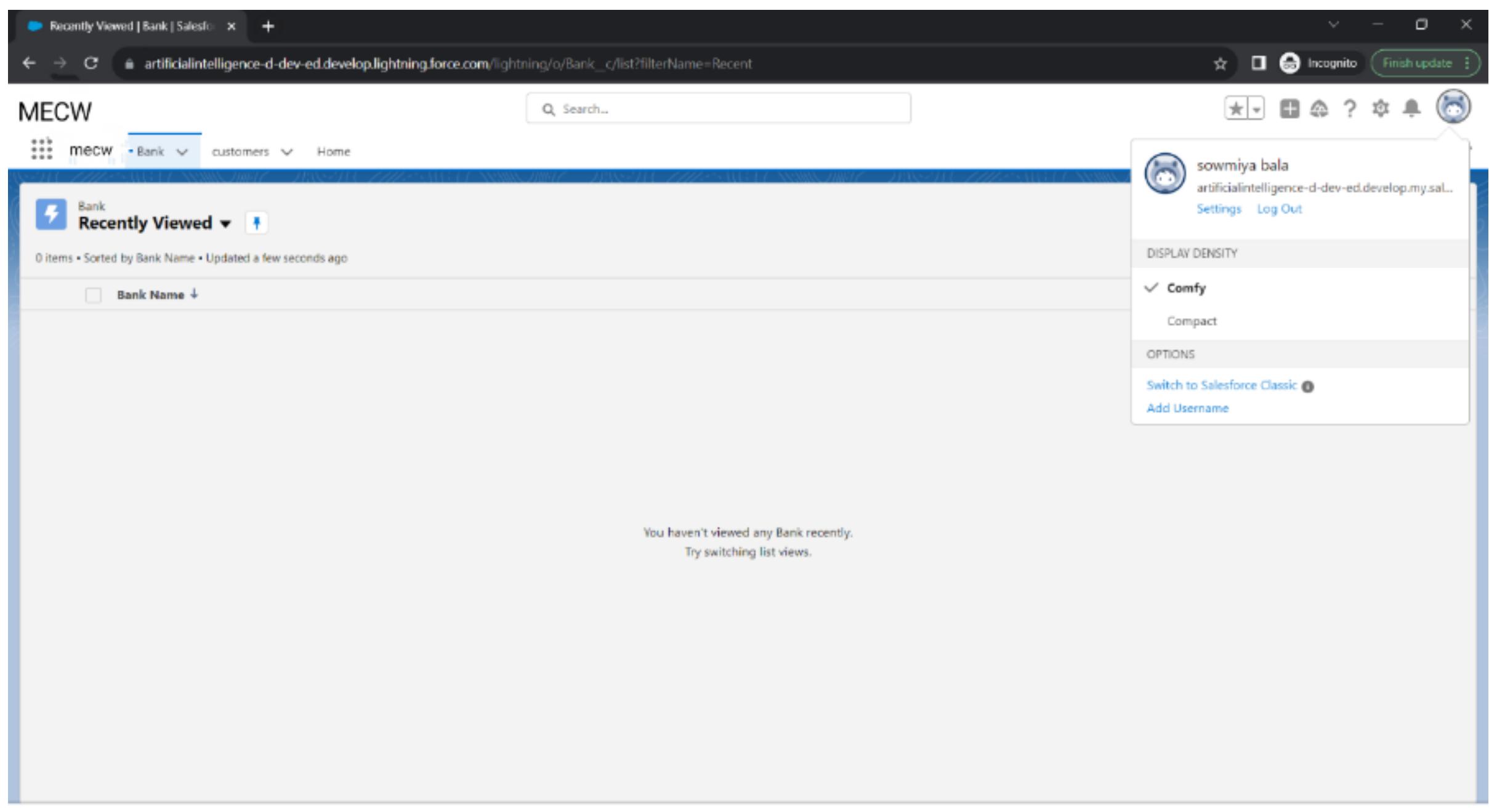
Comfy

Compact

OPTIONS

Switch to Salesforce Classic

Add Username



New Bank | Salesforce x +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=16... ☆ Incognito Finish update

List View

mebw - Bank customers Home

Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

Information

* = Required Information

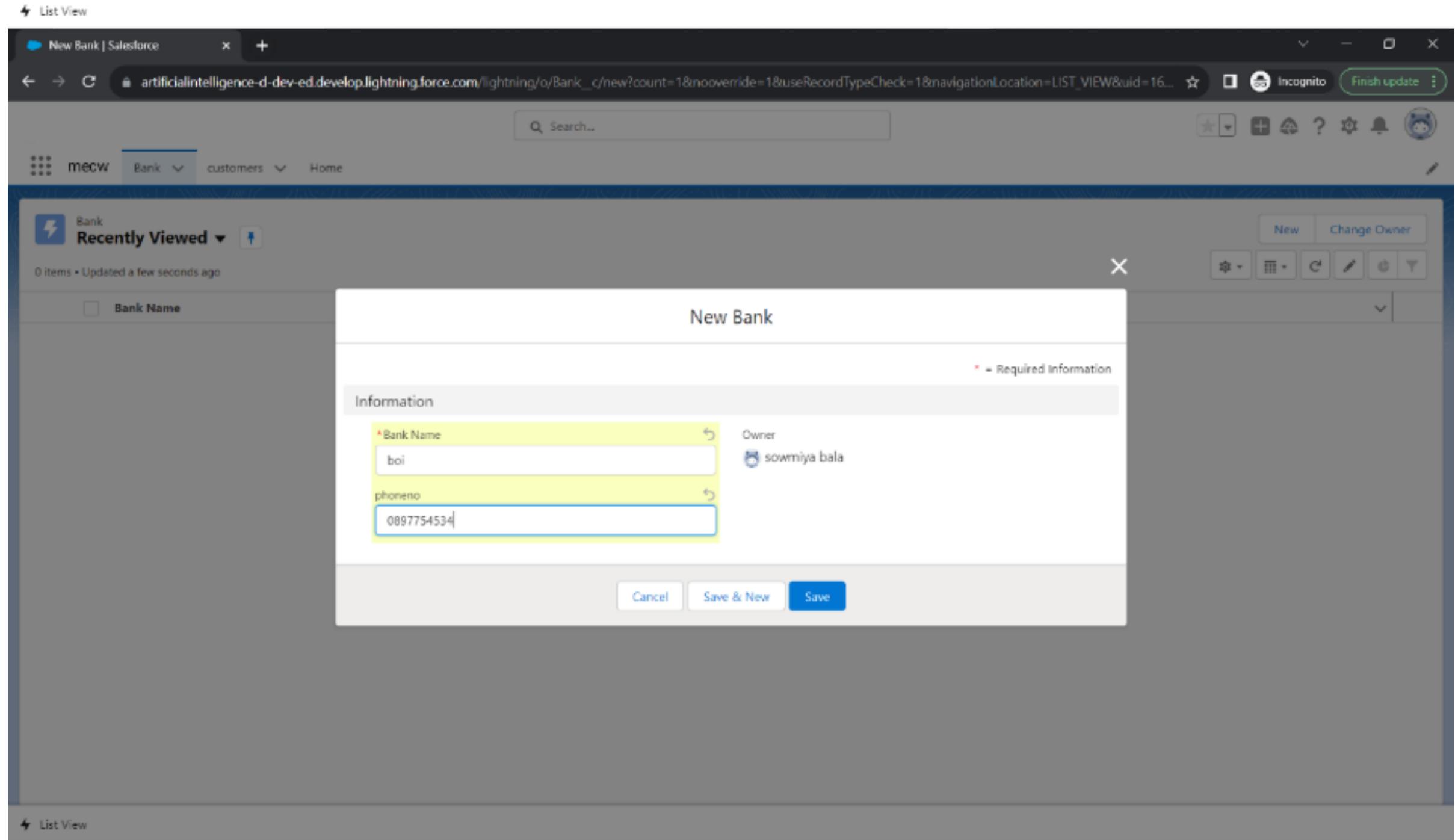
Bank Name: boi

Owner: sowmiya bala

phoneno: 0897754534

New Change Owner

Cancel Save & New Save



New customer | Salesforce

Recently Viewed

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

customer Name: madhu

Bank: boi

New customer

Information

*customer Name: madhu

*Bank: boi

Cancel Save & New Save

List View

madhu | customer | Salesforce

customer "madhu" was created.

Related Details

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

New Contact Edit Delete

Salesforce Developer Session 2 | (128) Top Hits 2025 | New Proj | Profiles | Salesforce | Welcome to Salesforce: Verify your...

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

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

SETUP Profiles

Profiles

All Profiles | Edit | Delete | Create New View

New Profile |

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

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

1 of 7 | 0 Selected | Page 1 of 1

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:

Save Cancel

Salesforce Developer Session 2 | (128) Top Hits 2025 | 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

Quick Find Search Setup Help for this Page

Profiles

Profile salesmanage

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

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

>Login IP Blocked (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 File Access (W) | Enabled Service Presence Status Access (W) | Enabled Custom Permissions (W)

Profile Detail

Name	salesmanage	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	QOPAL_E_01/10/2023, 7:19 pm	Modified By	QOPAL_E_01/10/2023, 7:19 pm

Page Layouts

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

Salesforce Developer Session 2 | (128) Top Hits 2025 | 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

Quick Find Search Setup Help for this Page

Profiles

Profile Edit salesmanage

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On
------	------------

Learning

Default On

Salesforce Developer Session 2 | (128) 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

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"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Data Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Salesforce Developer Session 2 | (128) 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

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"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

Password Policies

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

Save | Save & New | Cancel

Salesforce Developer Session 2 | Top Hits 2025 | New Proj | Users | Salesforce | Welcome to Salesforce: Verify your...

Search Setup

Setup Home Object Manager

Users

User Edit

New User

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: salesmanager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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 Users

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, ariyampalayam, utthamandalapuram...

City: SALEM

Zip/Postal Code: 636308

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

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 Users

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, ariyampalayam, utthamandalapuram...

City: SALEM

Zip/Postal Code: 636308

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

Generate new password and notify user immediately

Save Save & New Cancel

Salesforce Developer Session 2 | (128) Top Hits 2025 | New Proj | Users | Salesforce | Welcome to Salesforce: Verify your account

Search Setup

Setup Home Object Manager

Users

User Detail

Name: madhu b
Alias: mb
Email: 2k20csit@kiot.ac.in [Verify]
Username: 2k20csit@kiot.ac.in
Nickname: User16951684242865419206
Title: worker
Company: kiot bank
Department: Sales
Division: Address: 4/194, azampalayam, uthamasolapuram,, Parakkadu , salem- 696308
SALEM 696308
TAMIL NADU
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale: English (India)
Language: English
Delegated Approval Manager: Receive Approval Request Emails: Only if I am an approver
Federation ID: App Registration: One-Time Password Authenticator:

Role: User License: Salesforce Platform Profile: salesmanager
Active:
Marketing User: Offline User: Knowledge User: Flow User: Service Cloud User: Site.com Contributor User: Site.com Publisher User: WDC User: Mobile Push Registrations: Data.com User Type:
Accessibility Mode (Classic Only): Debug Mode: High-Contrast Palme on Charts: Load Lightning Pages While Scrolling:

Gmail

Compose

Inbox 5,318

Starred Snoozed Sent Drafts More

Labels +

Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Username: 2k20csit@kiot.ac.in

Again, welcome to Salesforce!

Reply Forward

[Change Your Password | Salesforce](#)

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



Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password
***** Good

* Confirm New Password
***** Match

Security Question
In what city were you born?

* Answer
india

Change Password

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

[Recently Viewed | Bank | Salesforce](#)

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

MECW

mecw Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

List View

Recently Viewed | customers | 5 items

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

MECW

mechw Bank customers Home

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

WhatsApp | Salesforce Developer Session | 1280 Top Hits 2023 | Permission Sets | Salesfo... | Welcome to Salesforce | Reset Password | Salesfo...

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

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

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

1 of 29 | 0 Selected | Page 1 of 2

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

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.

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

The left sidebar shows the navigation menu under the "Users" category, with "Permission Sets" selected. Other visible items include "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings", "Data.com", "Service", "Embedded Service", "User Interface", and "Actions & Recommendations".

The main content area is titled "Permission Sets" and contains the following information:

Permission Sets

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

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

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

A table lists 29 permission sets, each with an Action column (checkboxes for Del, Clone), a Permission Set Label, a Description, and a License column. The table includes a header row with columns for Action, Permission Set Label, Description, and License. The License column uses abbreviations for various Salesforce licenses.

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

Page: 1 of 2

Salesforce Setup Page - Permission Sets

Permission Set Create

Enter permission set information

Label: (Required Information)

API Name: (Required Information)

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License: --None--

Save | Cancel

Help for this Page

Setup Home Object Manager

Search Setup

Cloud icon

Left sidebar navigation:

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

Salesforce Setup Page - Permission Sets

Permission Set Create

Enter permission set information

Label: salesmanager (Required Information)

API Name: salesmanager (Required Information)

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License: --None--

Save | Cancel

Help for this Page

Setup Home Object Manager

Search Setup

Cloud icon

Left sidebar navigation:

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

Permission Sets

salesmanager

Permission Set Overview

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

Apps

- Assigned Apps
- Assigned Connected Apps
- Object Settings
- App Permissions
- Apex Class Access
- Visualforce Page Access
- External Data Source Access
- Flow Access

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
All Insight Reasons	No Access	--	--
All Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invitees	No Access	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	5	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	No Access	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

Salesforce Setup - Permission Sets

Permission Set: salesmanager

Object Permissions:

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

Field Permissions:

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

Tab Settings:

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

Save Cancel

Salesforce Setup - Permission Sets

Permission Set: salesmanager

Object Permissions:

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

Field Permissions:

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

Tab Settings:

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

Save Cancel

Salesforce Setup interface showing the 'Current Assignments' screen for the 'salesmanager' permission set.

The sidebar navigation includes:

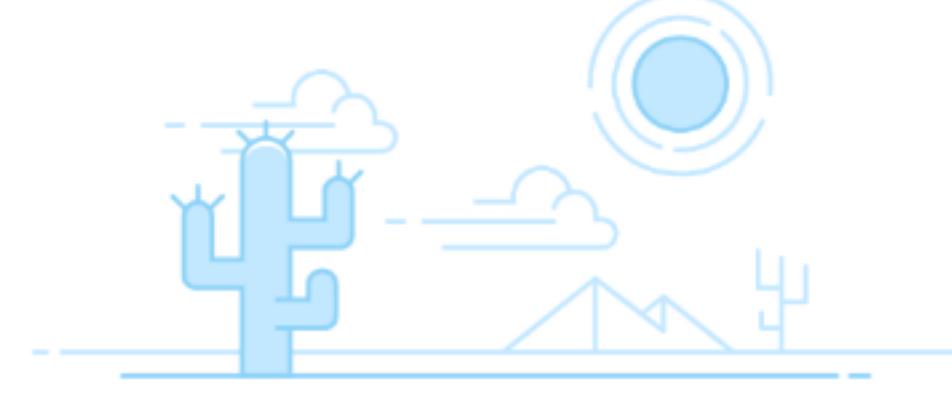
- Setup
- Home
- Object Manager

Under 'Users' in the sidebar:

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

The main content area displays:

Current Assignments



No assignments defined.

Screenshot 2: Salesforce Setup interface showing the 'Select Users to Assign' screen.

The sidebar navigation is identical to the first screenshot.

The main content area displays:

Select Users to Assign

All Users

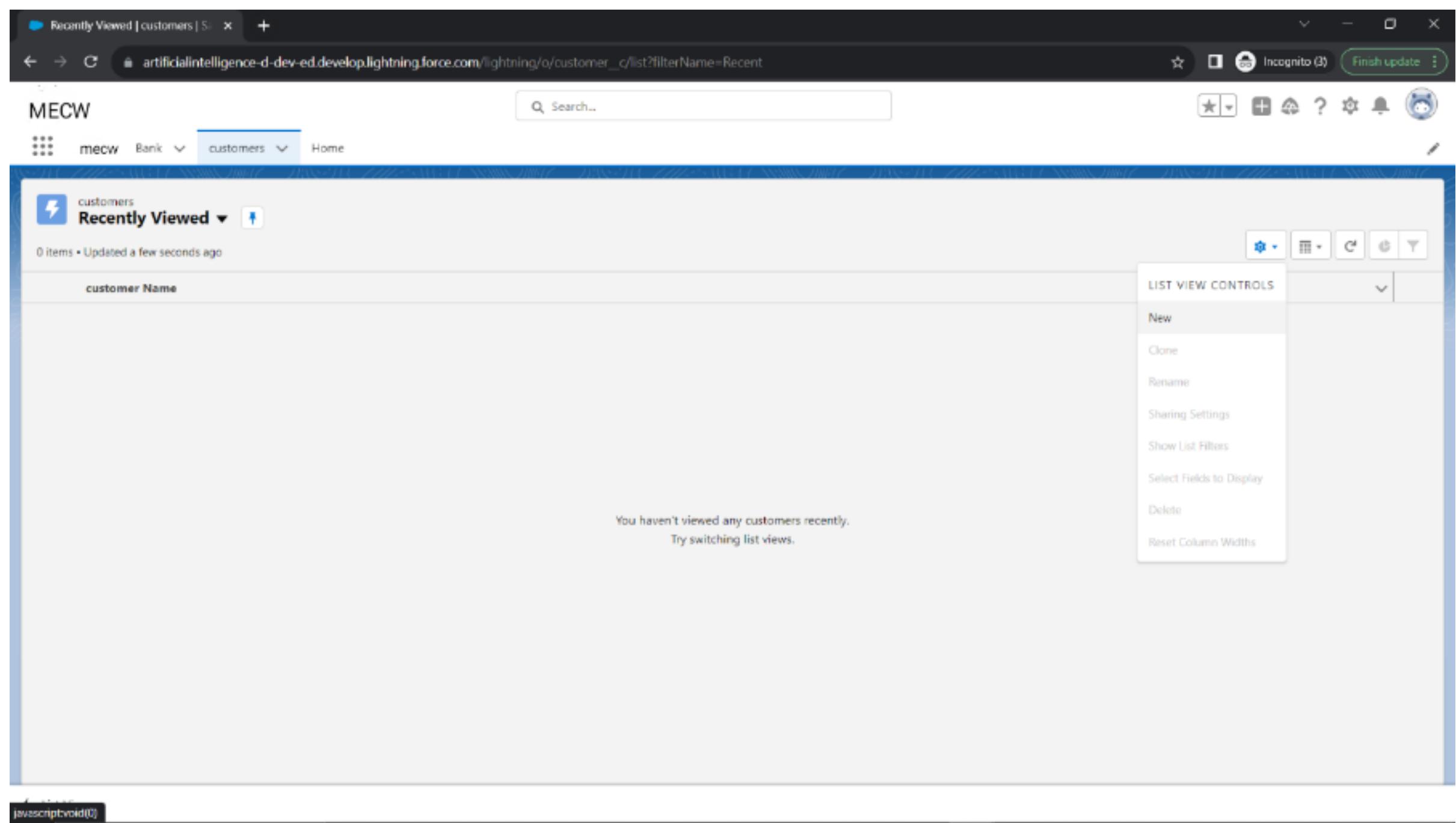
Full Name	Username	Role	Profile
Amelia Ellington	aelli	Force.com - App Subscription User	
Chatter Expert	Chatty	Chatter Free User	
Diya Adanna	dadian	UIMS User	
GOPAL S	GS	System Administrator	
Integration User	integ	Analytics Cloud Integration User	
madhu b	mb	salesmanage	
Security User	sec	Analytics Cloud Security User	
sowmiya bala	sbala	Manager	

Buttons at the bottom: Cancel, Next.

Screenshot of the Salesforce Setup interface showing the assignment of a Permission Set to a user.

The top window shows the "Select an Expiration Option FOR Assigned Users" screen. The "No expiration date" option is selected. A "Selected Users" table lists one user, "madhu b", assigned to the "salesmanager" profile, with "Salesforce Platform" User License and "Never Expires" set for "Expires On".

The bottom window shows the "Assignment Summary" screen after the assignment was completed. It displays the same user information: "madhu b" assigned to "salesmanager" profile, "Salesforce Platform" User License, and "Never Expires" for "Expires On". The status is marked as "Success".



javascript:void(0)

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

Solution:

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

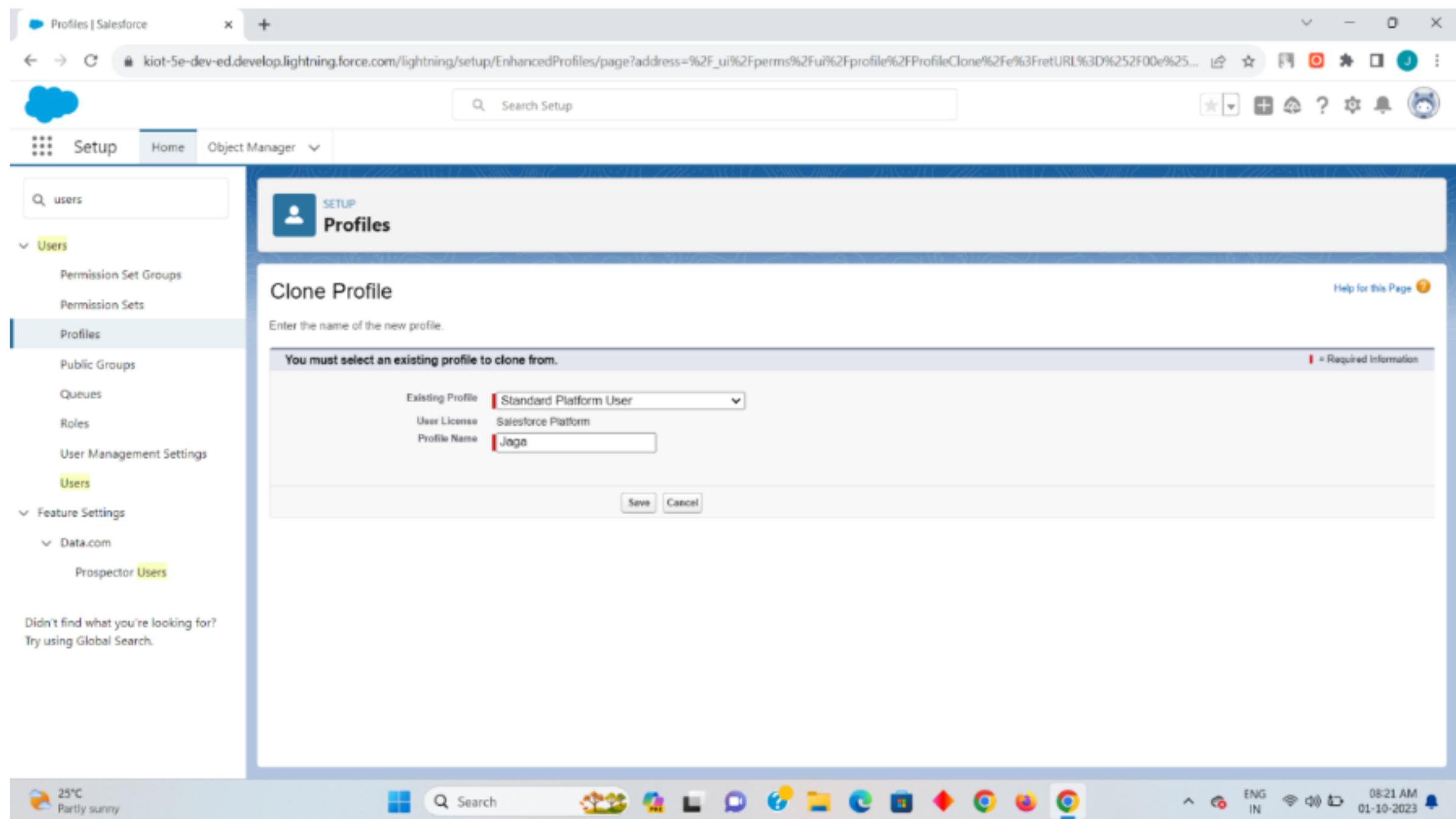
Setup-quick search[profile]

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

- Page Title:** Profiles | Salesforce
- URL:** kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e%3FisDeleteRedirect%3Dtrue%26setupid%3DEnhancedProfiles
- Header:** Search Setup
- Left Sidebar:** Home, Object Manager, a search bar, and a sidebar menu with sections like Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, and Users.
- Main Content:** The "Profiles" section with a table listing profiles. The table has columns: Action, Profile Name, User License, and Custom. The "User License" column includes options like Analytics Cloud Integration User, Analytics Cloud Integration User, Authenticated Website, Chatter External, Chatter Free, Chatter Free, Contract Manager, XOrg Proxy User, Salesforce, Salesforce, Salesforce, Customer Community Login, Customer Community Plus Login, and Customer Community Plus.
- Bottom:** A toolbar with various icons, a weather widget (25°C Partly sunny), and system status indicators (ENG IN, 08:20 AM, 01-10-2023).

Step 2:

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



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

Step 3:

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

The screenshot shows the Salesforce Setup Profiles page. On the left, there's a sidebar with navigation links like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', 'Data.com', and 'Prospector Users'. The 'Profiles' link is highlighted. The main content area is titled 'Profile Jaga'. It displays the profile details: Name (Jaga), User License (Salesforce Platform), Description (Not Assigned), Created By (Jagadesh_S), Modified By (Jagadesh_S), and a 'Custom Profile' checkbox which is checked. Below this is the 'Page Layouts' section, which lists various standard object layouts for different objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation. The 'Alternative Payment Method' layout is currently selected. At the bottom of the page, there are tabs for 'Edit', 'Clone', 'Delete', and 'View Users'.

This screenshot continues from the previous one, showing the 'Profiles' page. The 'Custom Object Permissions' section is visible, displaying checkboxes for various permissions like 'Basic Access Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All' for different objects. The 'Session Settings' section at the bottom includes fields for 'Session Times Out After' (set to '2 hours of inactivity'), 'Session Security Level Required at Login' (set to 'None'), and several checkboxes for login policies like 'Separate Experience Cloud site and Salesforce login authentication for employees', 'Relax login IP restrictions', and 'Skip employee device activation during Experience Cloud site login'.

Profiles | Salesforce

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

Setup Home Object Manager

Q users

Users

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

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

25°C Partly sunny

SETUP Profiles

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

Custom Object Permissions

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

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 logins

ENG IN 08:21 AM 01-10-2023

This screenshot shows the 'Profiles' section of the Salesforce Setup. It displays a grid of global permissions for various objects like Communication Subscriptions, Locations, and Contact Types. Below this is a 'Custom Object Permissions' section with two tables for 'Providers' and 'Resources'. At the bottom, there are 'Session Settings' for session timeout and security level. A note about Experience Cloud login policies is present.

Profiles | Salesforce

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

Setup Home Object Manager

Q users

Users

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

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

25°C Partly sunny

SETUP Profiles

Profile Edit: Jaga

Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit

Name: <input type="text" value="Jaga"/>	Save	Save & New	Cancel
User License: Salesforce Platform	Custom Profile: <input checked="" type="checkbox"/>		
Description:			

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"/>
Hive App (Hive_App)	<input checked="" type="checkbox"/>	<input type="radio"/>				

Service Provider Access

Tab Settings

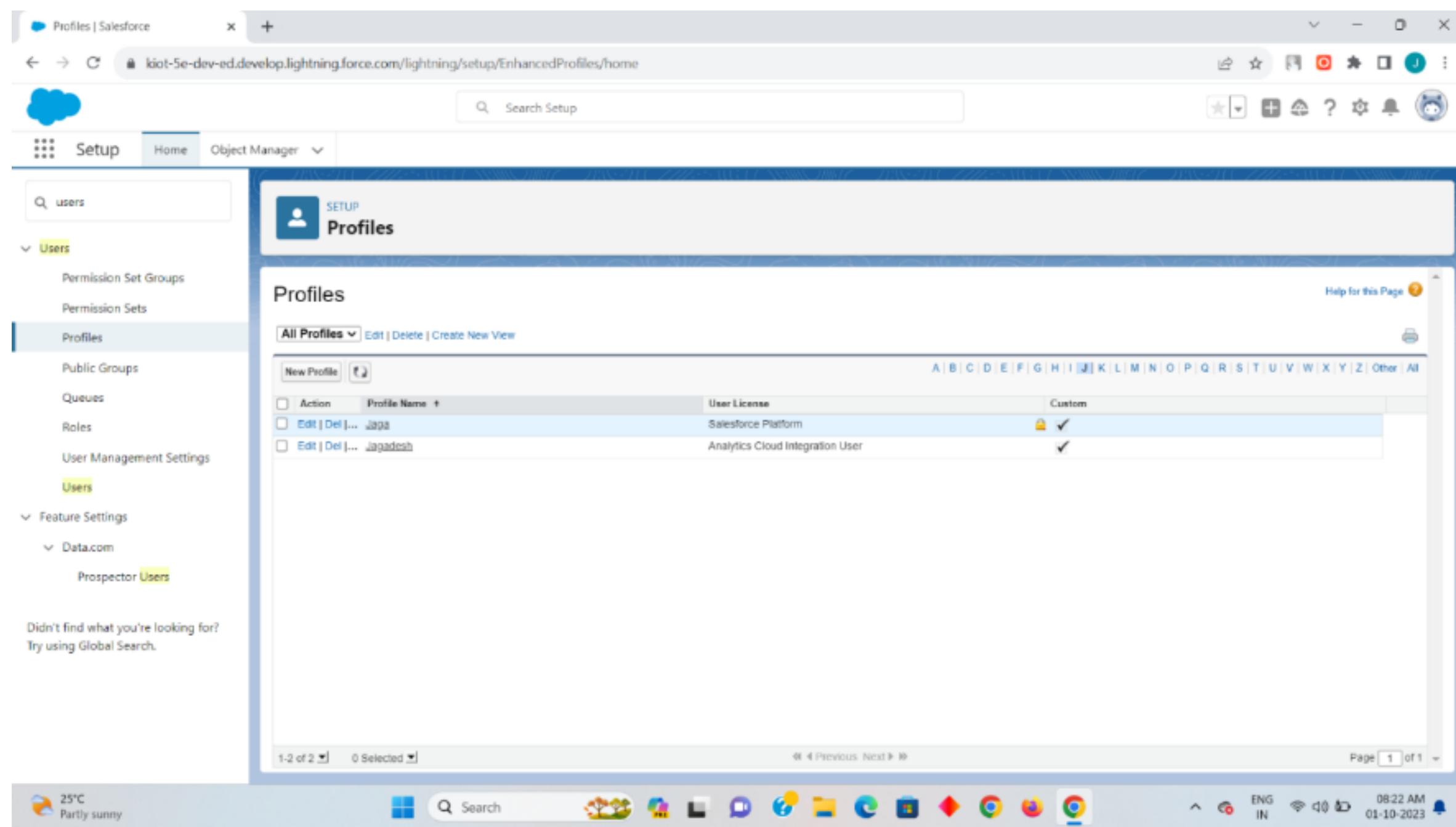
Overwrite users' personal tab customizations

ENG IN 08:21 AM 01-10-2023

This screenshot shows the 'Profile Edit' screen for the 'Jaga' profile. It includes fields for Name, User License (Salesforce Platform), and a 'Custom Profile' checkbox. Below this are sections for 'Custom App Settings' and 'Service Provider Access', which lists Analytics Studio, App Launcher, and Hive App. There's also a 'Tab Settings' section with a checkbox for overwriting user 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 with the 'Profiles' page open. The left sidebar is collapsed, and the main content area displays the 'Profiles' section. The 'Profiles' tab is selected under the 'Users' category. The page title is 'Profiles' and the sub-page title is 'All Profiles'. There are two profiles listed:

Action	Profile Name	User License	Custom
Edit Del ...	jaga	Salesforce Platform	✓
Edit Del ...	Jagadash	Analytics Cloud Integration User	✓

At the bottom of the page, there are navigation links for '1-2 of 2' and '0 Selected', and a page footer showing 'Page 1 of 1'.

Step 5:

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

Salesforce 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	chatty0009@0000c8 oseat6#blkred4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	Grey_Jane	Jgrey	jane_grey@nimmoaim.cz7d2kio7o3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
Edit	S_Jaga	S	jaga125@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
Edit	S_Jagadesh	SJ	w0w@gmail.com	SE Admin	<input checked="" type="checkbox"/>	System Administrator
Edit	S_Jagadesh	SJ	jaga117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
Edit	User_Integration	Integ	integration@0005900000c8 oseat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@0005900000c8 oseat.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

Help for this Page

Salesforce Setup - Users

New User

User Edit

General Information

First Name	Jagadesh11	Role	Director, Channel Sales
Last Name	S	User License	Salesforce Platform
Alias	S	Profile	-None-
Email	jwr123@gmail.com	Active	-None-
Username	jwr123@gmail.com	Marketing User	Jaga Standard Platform User
Nickname	User169612675144962592	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		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 Pallete on Charts	<input type="checkbox"/>

Save | Save & New | Cancel

Help for this Page

Required Information

Salesforce Setup - Users

New User

User Edit

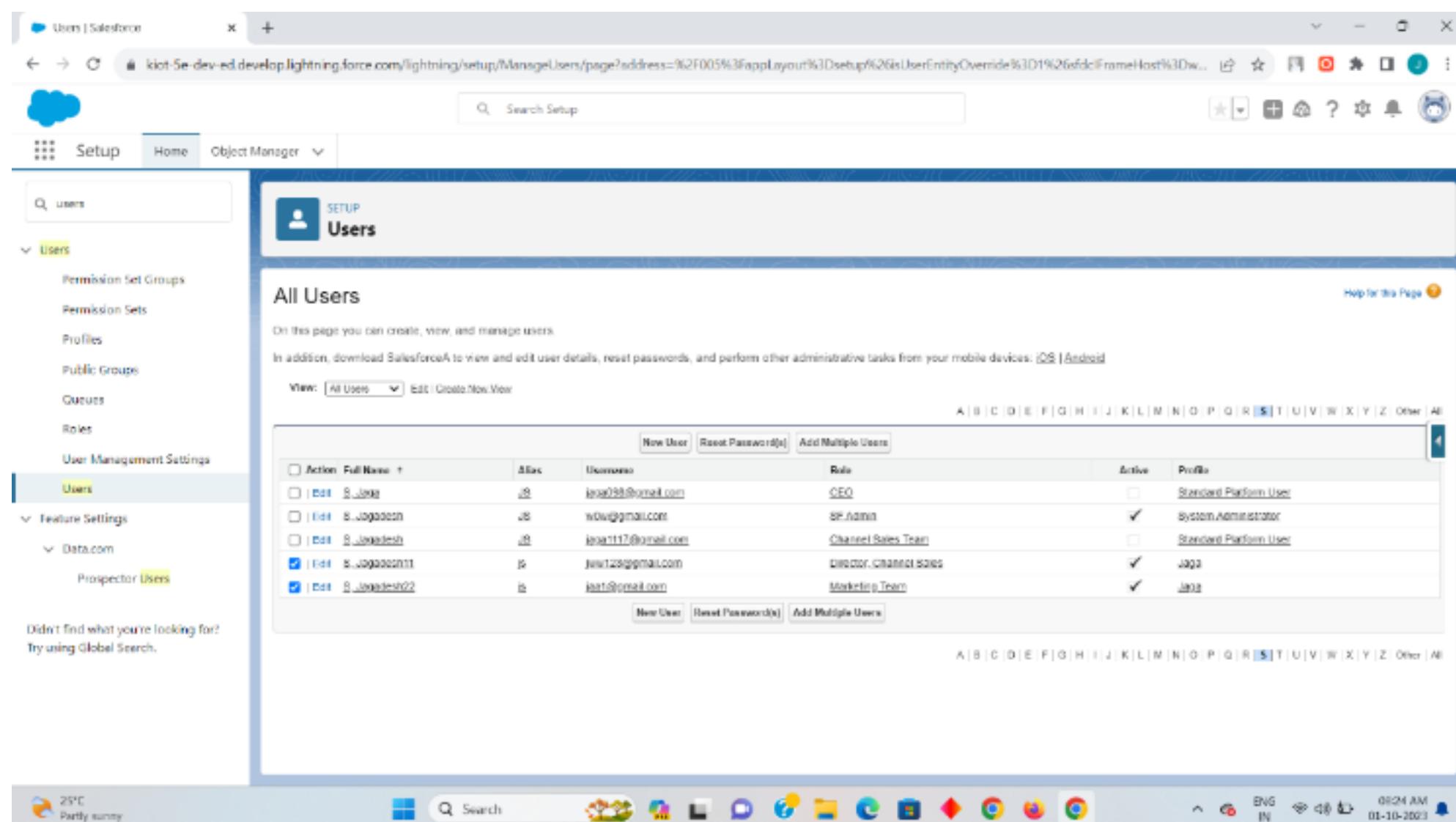
General Information

First Name	Jagadesh22	Role	Marketing Team
Last Name	S	User License	Salesforce Platform
Alias	S	Profile	-None-
Email	jew1@gmail.com	Active	-None-
Username	jew1@gmail.com	Marketing User	Jaga Standard Platform User
Nickname	User169612079983618745	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		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 Pallete on Charts	<input type="checkbox"/>

Save | Save & New | Cancel

Help for this Page

Required Information



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

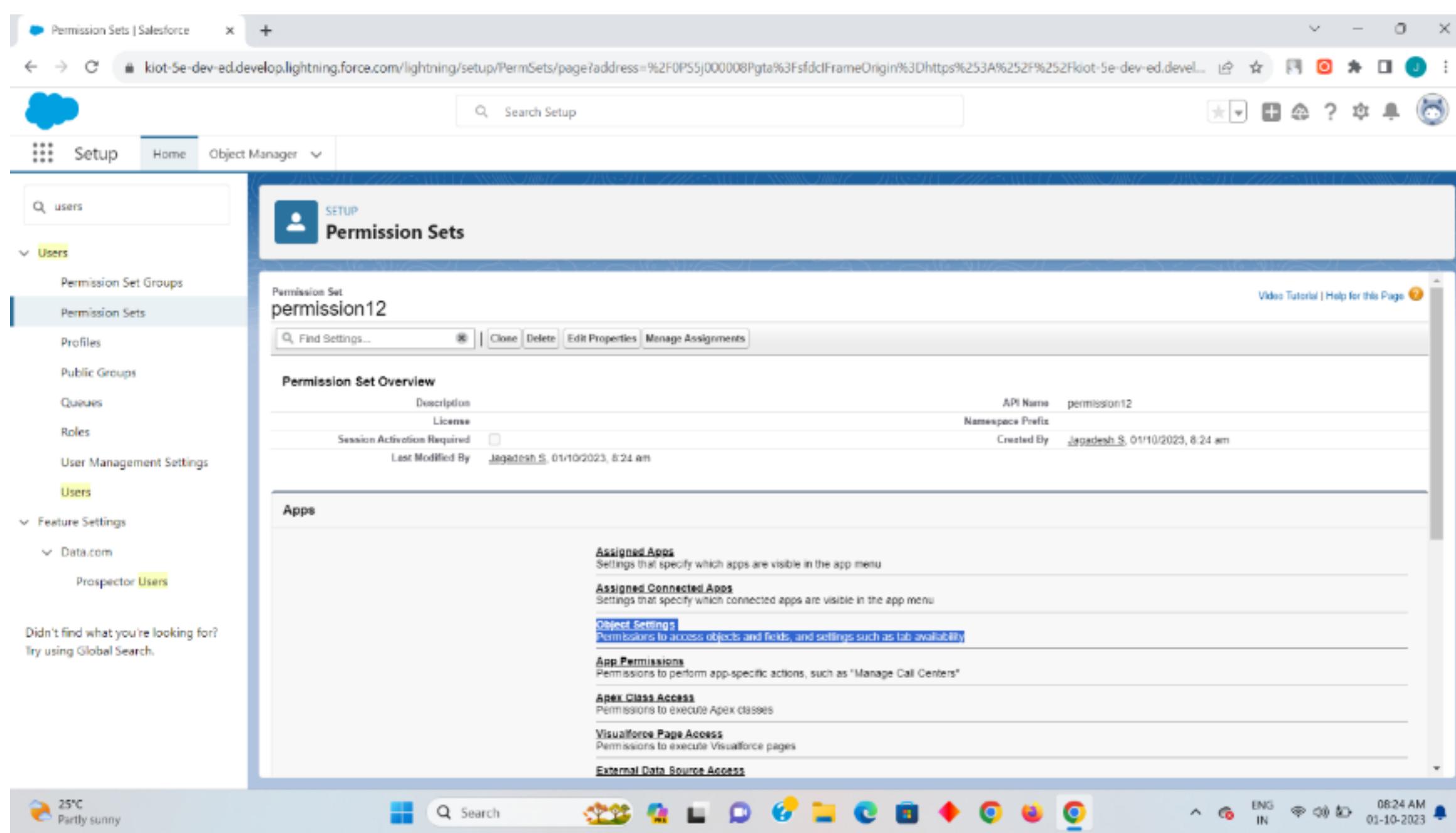
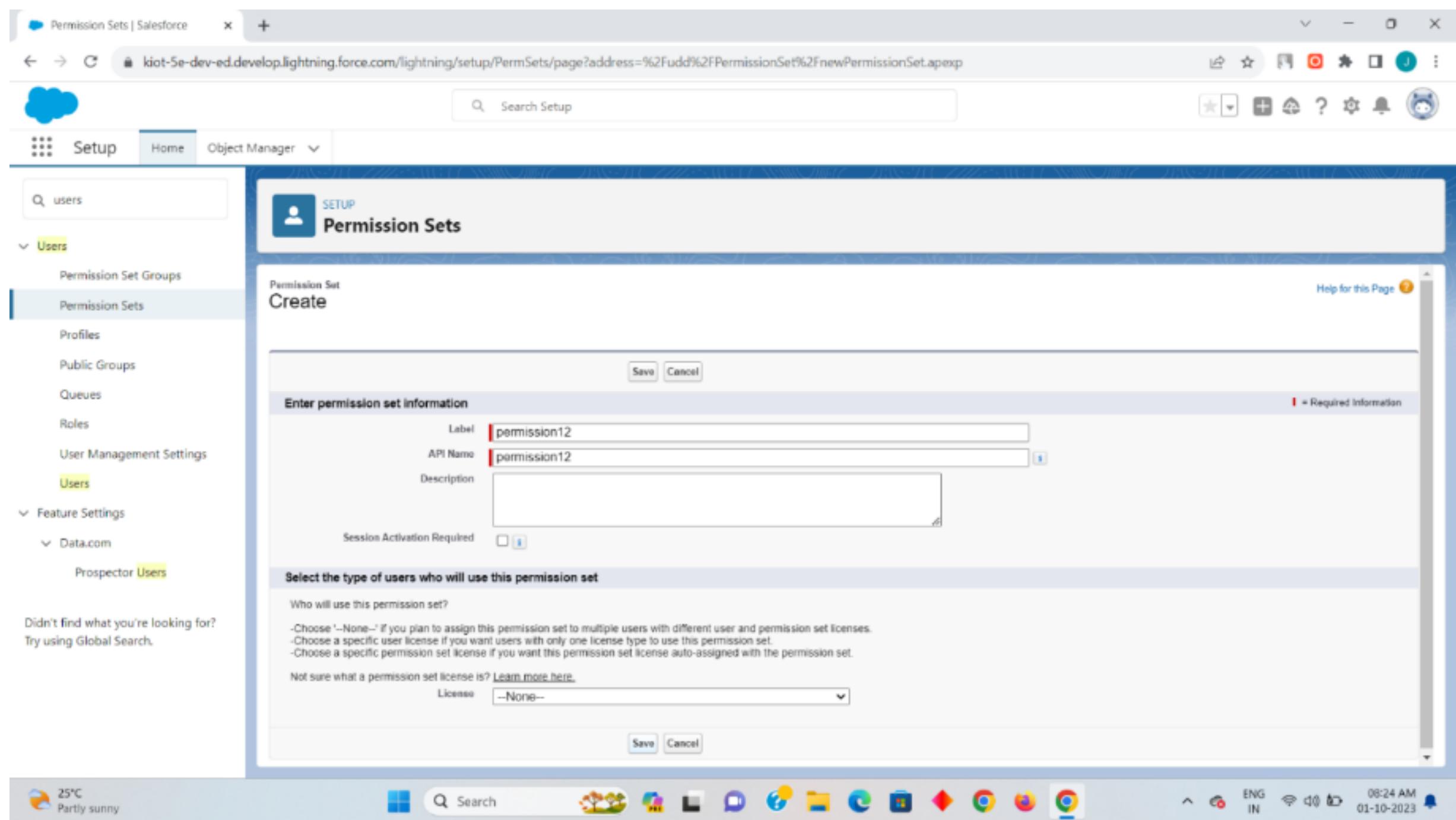
setup-quick search[permission set]-new-fill

**label name [auto select the API name]-click on
save-object settings-accounts.**

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar is collapsed, and the main area displays a list of permission sets. The list includes:

Action	Permission Set Label	Description	Licenses
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Excellence Profile Manager	Let's users create, read, edit, and delete locations, sublocations, que...	Salesforce
<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

At the bottom of the list, there are navigation links for 'Previous' and 'Next', and a page indicator 'Page 1 of 2'. The browser status bar at the bottom shows the URL <https://kolt-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/home>.



The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. A permission set named 'permission12' is selected. The 'Object Settings' tab is active, displaying a table of object permissions. The table has columns for 'Object Name', 'Object Permissions', 'Total Fields', and 'Tab Settings'. Most objects have 'No Access'. Some specific objects like 'Account Brands' and 'Asset Actions' also have 'No Access'. The table includes rows for various objects such as Account, AI Insight Reasons, AI Record Insights, Alternative Payment Methods, API Anomaly Event Stores, API Analytics Query Requests, Application Usage Assignments, Appointment Categories, Appointment Invitations, Appointment Invtees, Appointment Schedule Aggregates, Appointment Schedule Logs, Appointment Topic Time Slots, Asset Actions, and Asset Action Sources.

The screenshot shows the same Salesforce Setup interface, but the 'Accounts' tab is selected under the 'Object Settings' section for permission12. The 'Object Permissions' table shows that all permissions (Read, Create, Edit, Delete, View All, Modify All) are disabled (unchecked). Below this, the 'Field Permissions' table lists fields for the Account object: Account Name, Account Number, Account Owner, Account Site, and Account Source. For each field, both Read Access and Edit Access are disabled.

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 'Object Permissions' section for the 'Accounts' object, the 'Delete' permission is initially unchecked. After modification, it is checked, indicating it has been granted.

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

Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input type="checkbox"/>	<input type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	<input type="checkbox"/>	<input type="checkbox"/>

Step 8

Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then

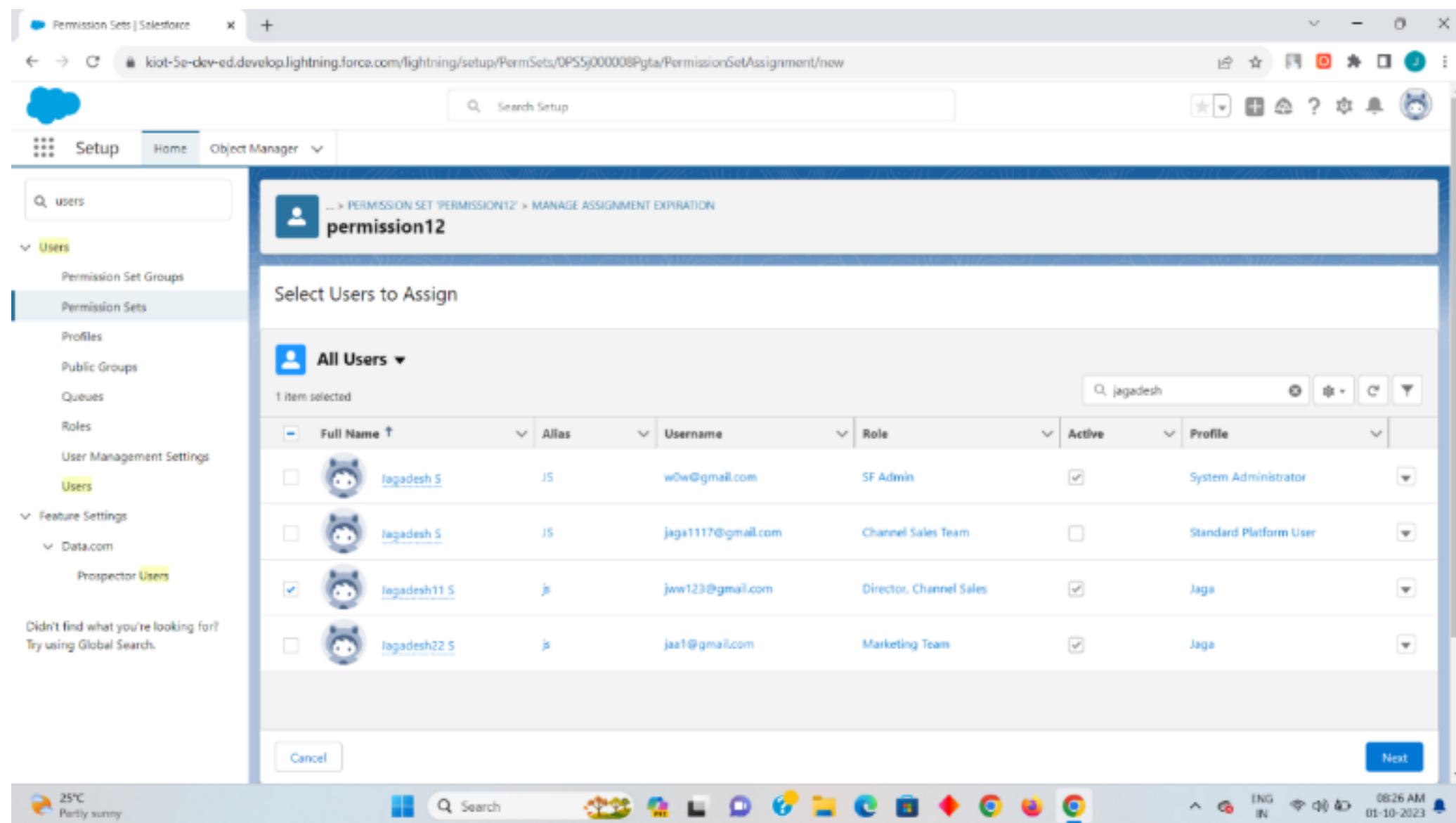
click on assign so that the specific selected user can have a special access as delete on it.

The image contains two screenshots of the Salesforce Setup interface, both titled "Permission Sets".

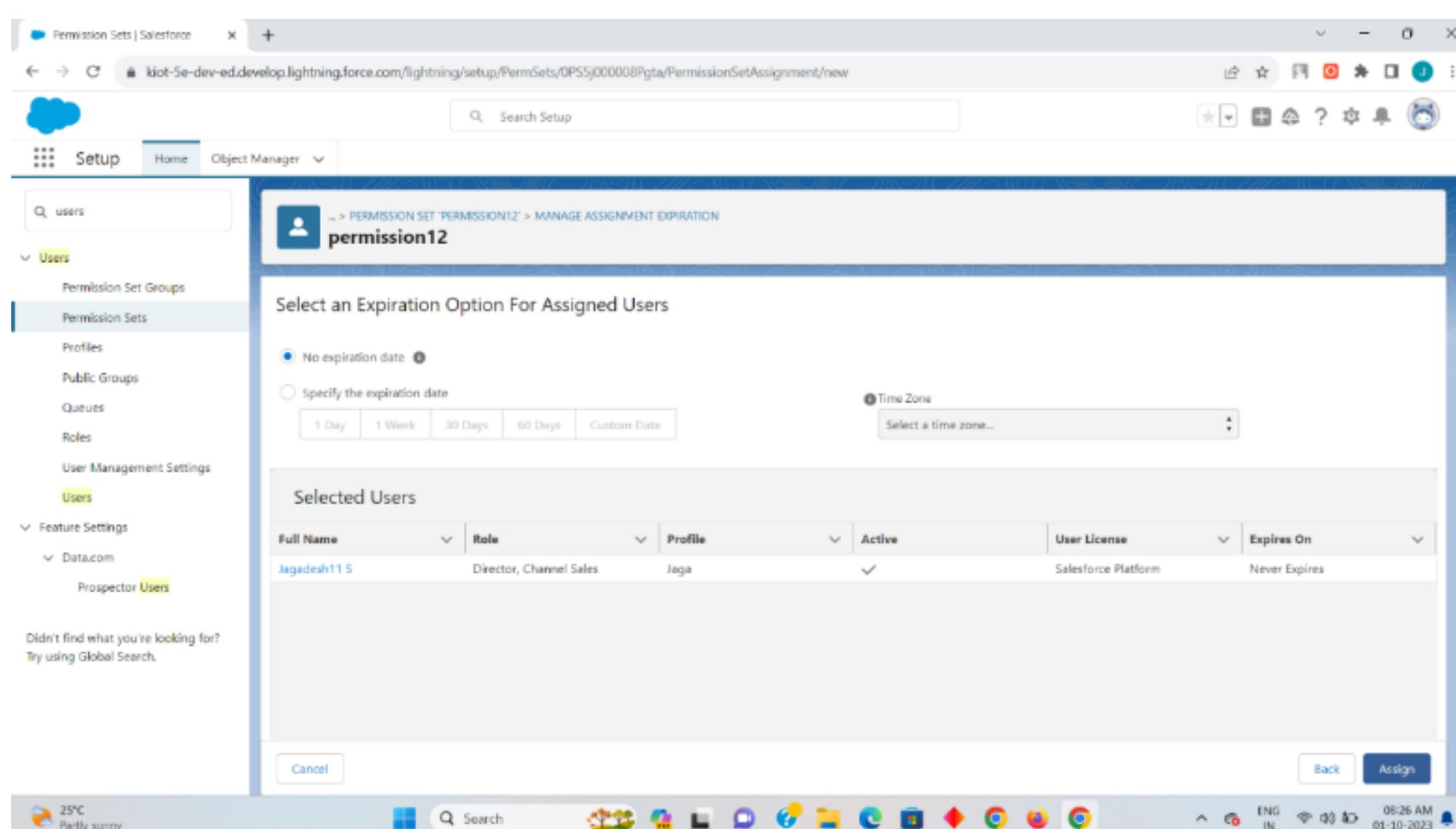
Screenshot 1: This screenshot shows the "Current Assignments" page for a permission set named "permission12". The sidebar on the left is expanded, showing sections like "Users", "Permission Set Groups", and "Permission Sets". The "Users" section is currently selected. The main area displays a cactus and sun icon with the message "No assignments defined." There is a "Add Assignment" button at the top right.

Full Name	Alias	Username	Role	Profile
Jagadesh S	js	wow@gmail.com	SF Admin	System Administrator
Jagadesh S	js	jaga1117@gmail.com	Channel Sales Team	Standard Platform User
Jagadesh11 S	ji	jw123@gmail.com	Director, Channel Sales	Jaga
Jagadesh22 S	js	jaa1@gmail.com	Marketing Team	Jaga

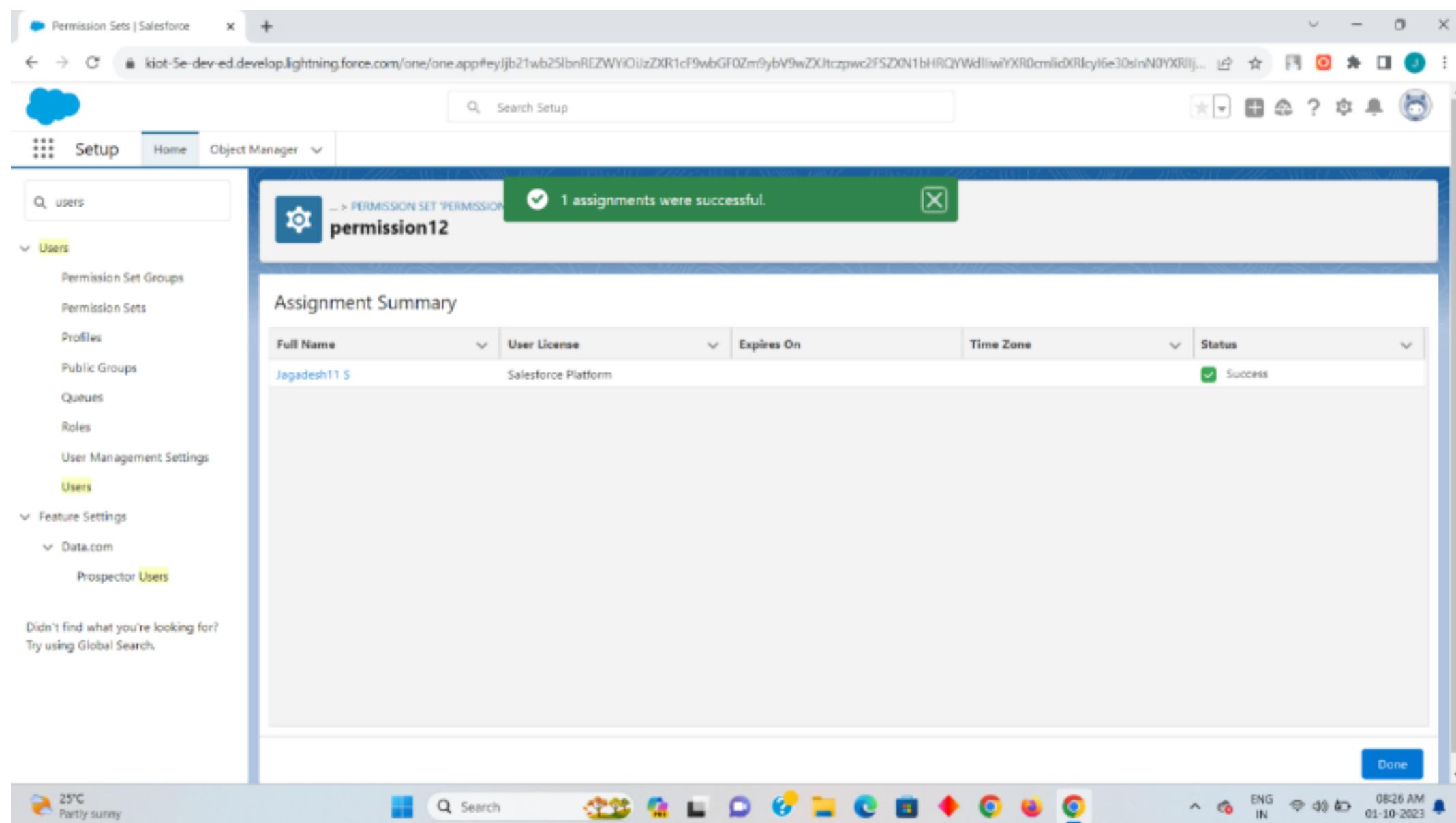
Screenshot 2: This screenshot shows the "Select Users to Assign" page for the same permission set. The sidebar is identical to the first screenshot. The main area has a search bar with "jagadesh" typed in. Below the search bar is a note: "All, Role, Alias, and Profile aren't searchable. Use filters or sort on these fields instead." A table lists four users, each with a checkbox next to their name. The "Next" button is visible at the bottom right.



Click next.



Now click 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.

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

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

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

5. Create a template like the following screenshot.

The screenshot shows the 'Email Template' page for 'Thank You Email - Survey'. At the top, there's a header with a blue square icon, the template name, and buttons for 'Edit in Builder', 'Edit', 'Clone', and a dropdown menu. Below the header, there are tabs for 'Details' (which is selected) and 'Related'. Under 'Information', there are fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Related Entity Type' (set to 'Survey Result'), 'Description' (empty), and 'Folder' (set to 'Public Email Templates'). A checkbox labeled 'Made in Email Template Builder' is checked. In the 'Message Content' section, there are two tabs: 'Subject' (set to 'Thank You For Completing Our Survey!') and 'Enhanced Letterhead' (disabled). The 'HTML Value' tab contains the following content:

```
Hi {{Survey_Result__c.Name__c}},  
Thanks for taking time out to participate in our survey. We are very appreciative  
of the time you have taken to assist in our analysis, and commit to utilizing the  
information gained to contemplate and implement  
worthwhile improvements. We will share these results with you through your  
State Survey Agency, whom we also thank for their generous participation.  
  
Once again, we are extremely grateful for your contributing your valuable time,  
your honest information, and your thoughtful suggestions.  
  
Thanks,  
Automation Champion
```

At the bottom, under 'Additional Information', it shows 'Created By' (Rakesh Gupta, 12/21/2020, 4:23 PM) and 'Last Modified By' (Rakesh Gupta, 12/21/2020, 4:32 PM).

Step 3: Create an Email Alert

1. Click Setup.
2. In the Quick Find box, type Email Alerts.

3. Select Email Alerts, click on the New Email Alert button.
4. Name the Email Alert and click the Tab button. The Unique Name will populate.
5. For Object select Survey Result.
6. For the Email Template chooses Lightning Email Template Thank You Email - Survey.
7. For Recipient Type select Email Field: Email.
8. Click Save.

Edit Email Alert
Survey - Thank You Email

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

Email Alert Edit Save Save & New Cancel

Edit Email Alert | = Required Information

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

Save Save & New Cancel

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

1. Click Setup.
2. In the Quick Find box, type Flows.
3. Select Flows then click on the New Flow.
4. Select the Screen Flow option and click on Next and configure the flow as follows:
 1. How do you want to start building: Freeform

5. We will use the Screen element to capture a Survey response form. Drag and drop a Screen element onto the canvas.

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

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

3. Row 2:

1. Field: Email__c
2. Value: {!Email.value}

4. Click 'Add Row'

5. Row 3:

1. Field: Name__c
2. Value: {!Name.firstName}
 {!Name.lastName}

6. Click 'Add Row'

7. Row 3:

1. Field: Rating__c
2. Value: {!Rating}

7. Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

*Label	*API Name
Save Response	Save_Response

Description

How Many Records to Create

- One
- Multiple

How to Set the Record Fields

- Use all values from a record
- Use separate resources, and literal values

Create a Record of This Object

*Object

Survey Result

Set Field Values for the Survey Result

Field	Value
Comment__c	← A ₃ Comment X
Email__c	← A ₃ Email > Value X
Name__c	← {!Name.firstName} {!Name.lastName}
Rating__c	← A ₃ Rating X

+ Add Field

Manually assign variables

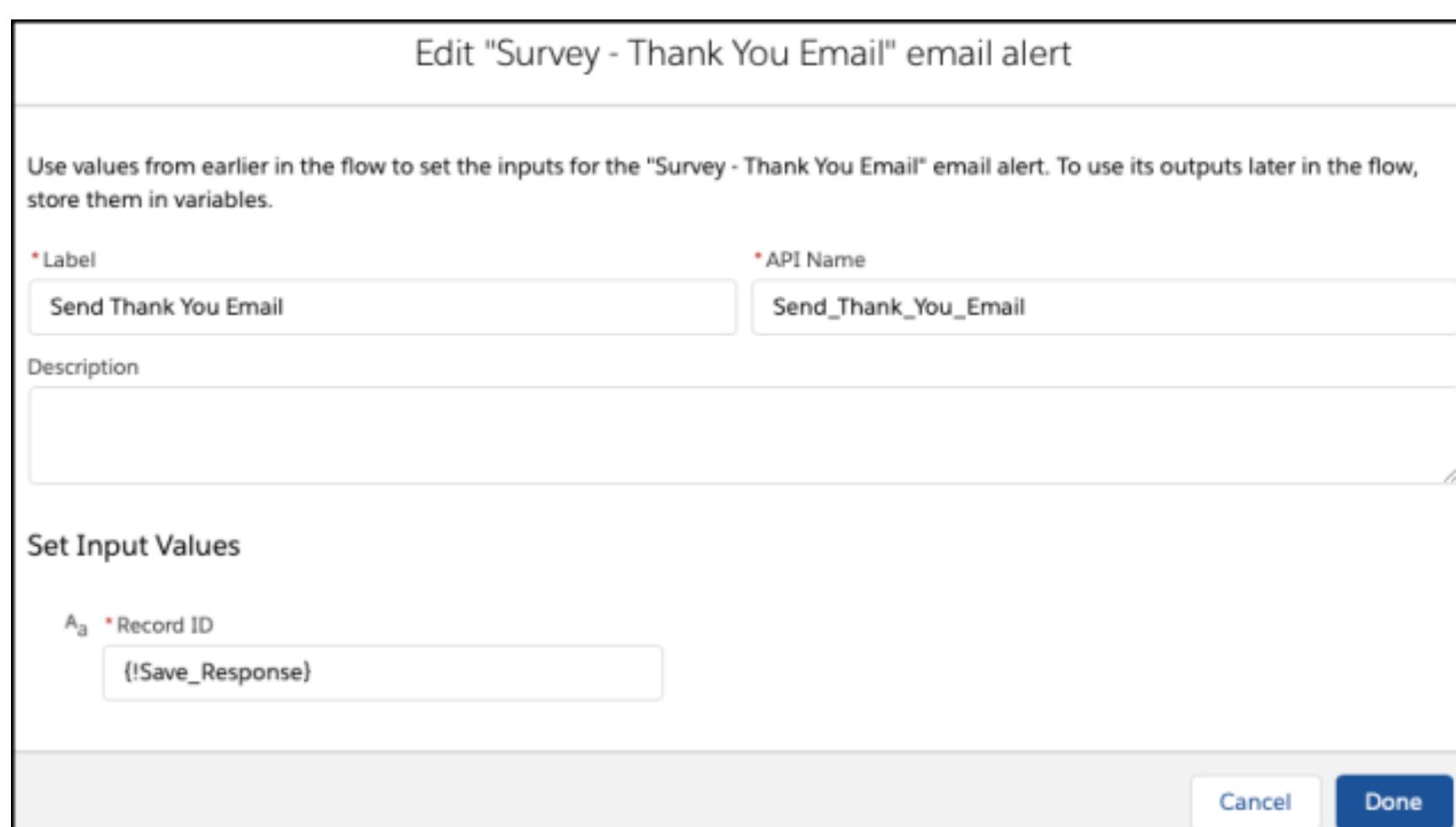
Cancel Done

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

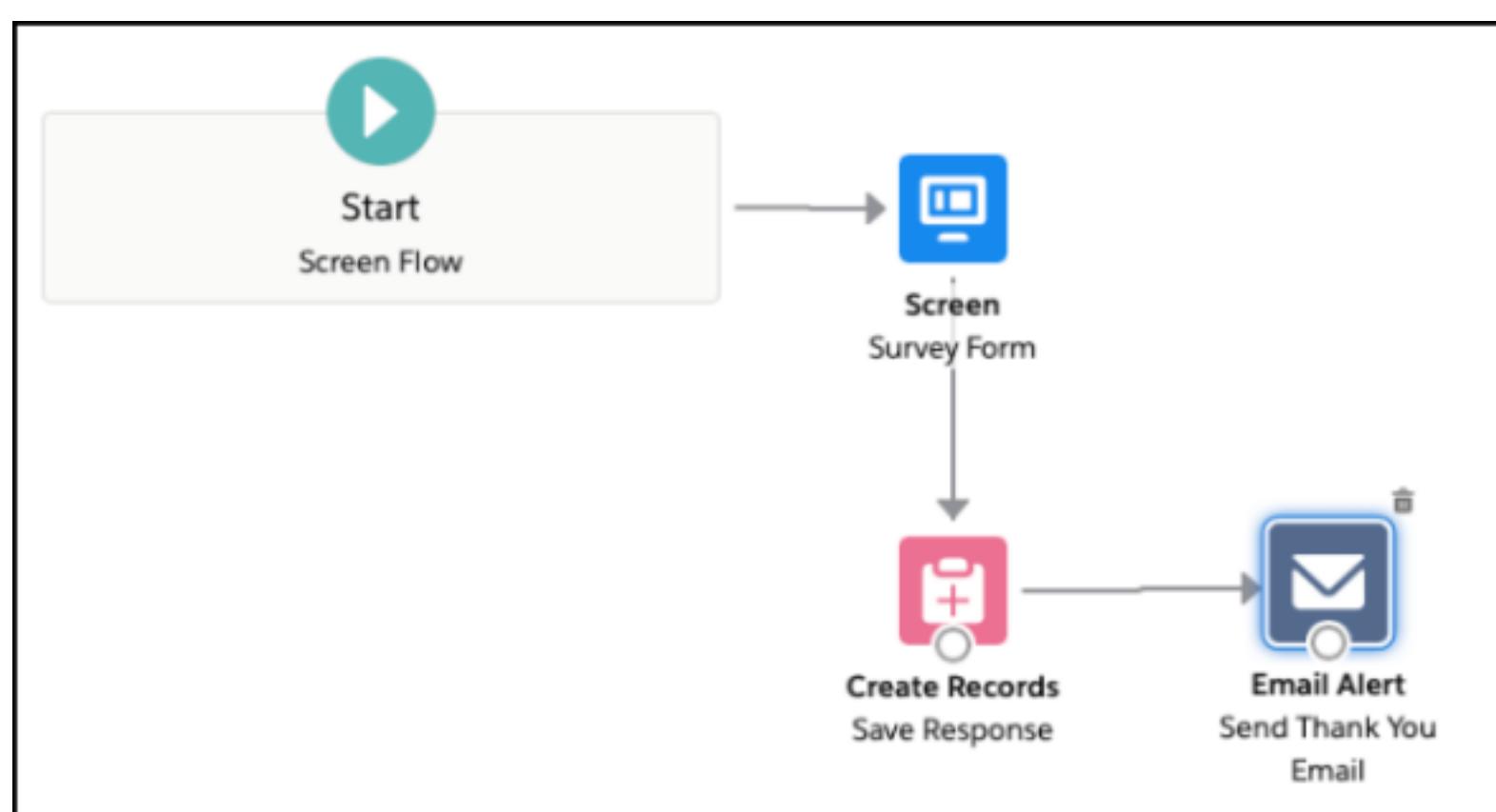
The next step is to call the Survey – Thank You Email email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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... i

Survey {!\$Flow.CurrentDateTime}

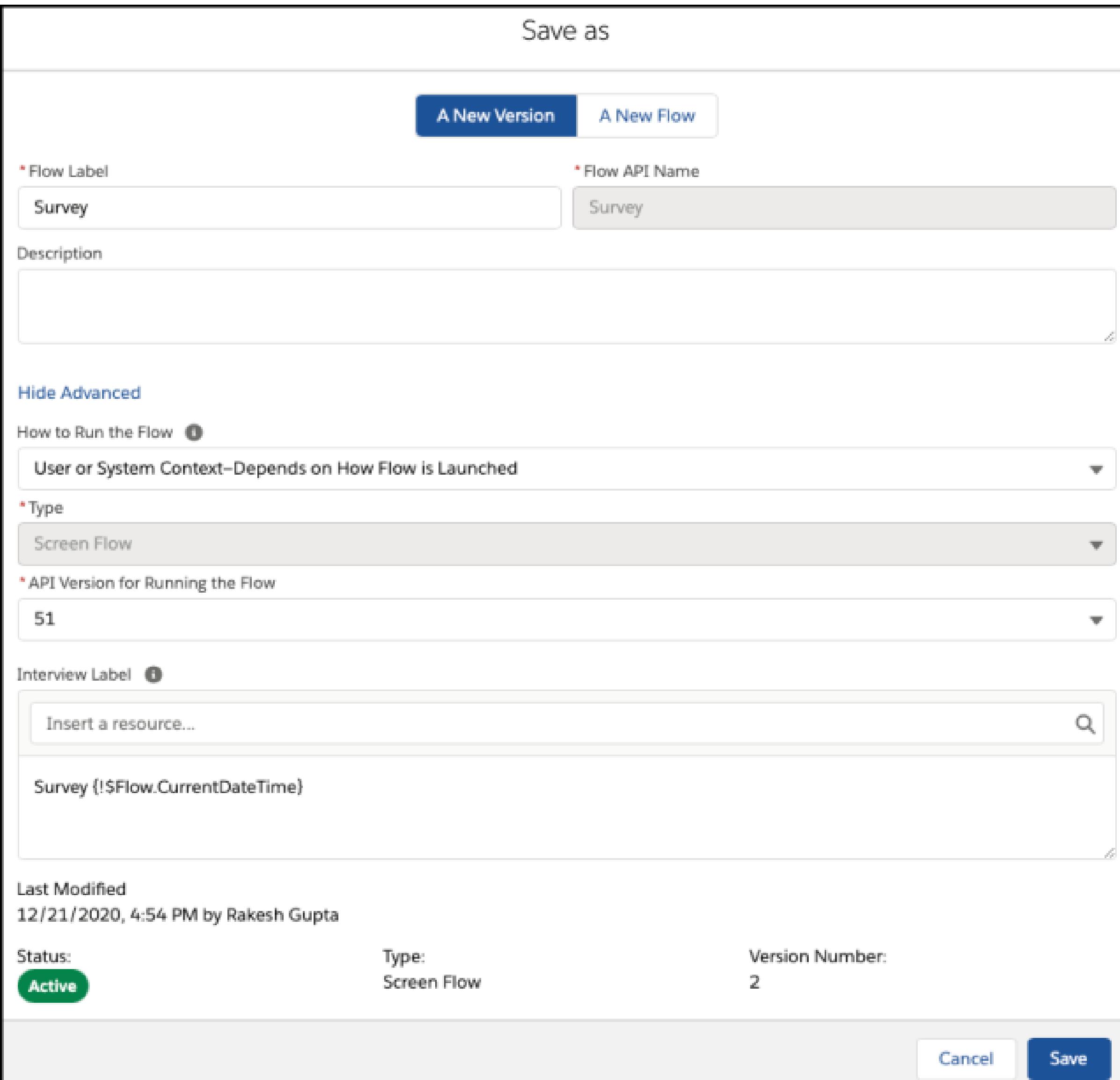
Last Modified
12/21/2020, 4:54 PM by Rakesh Gupta

Status: Active

Type: Screen Flow

Version Number: 2

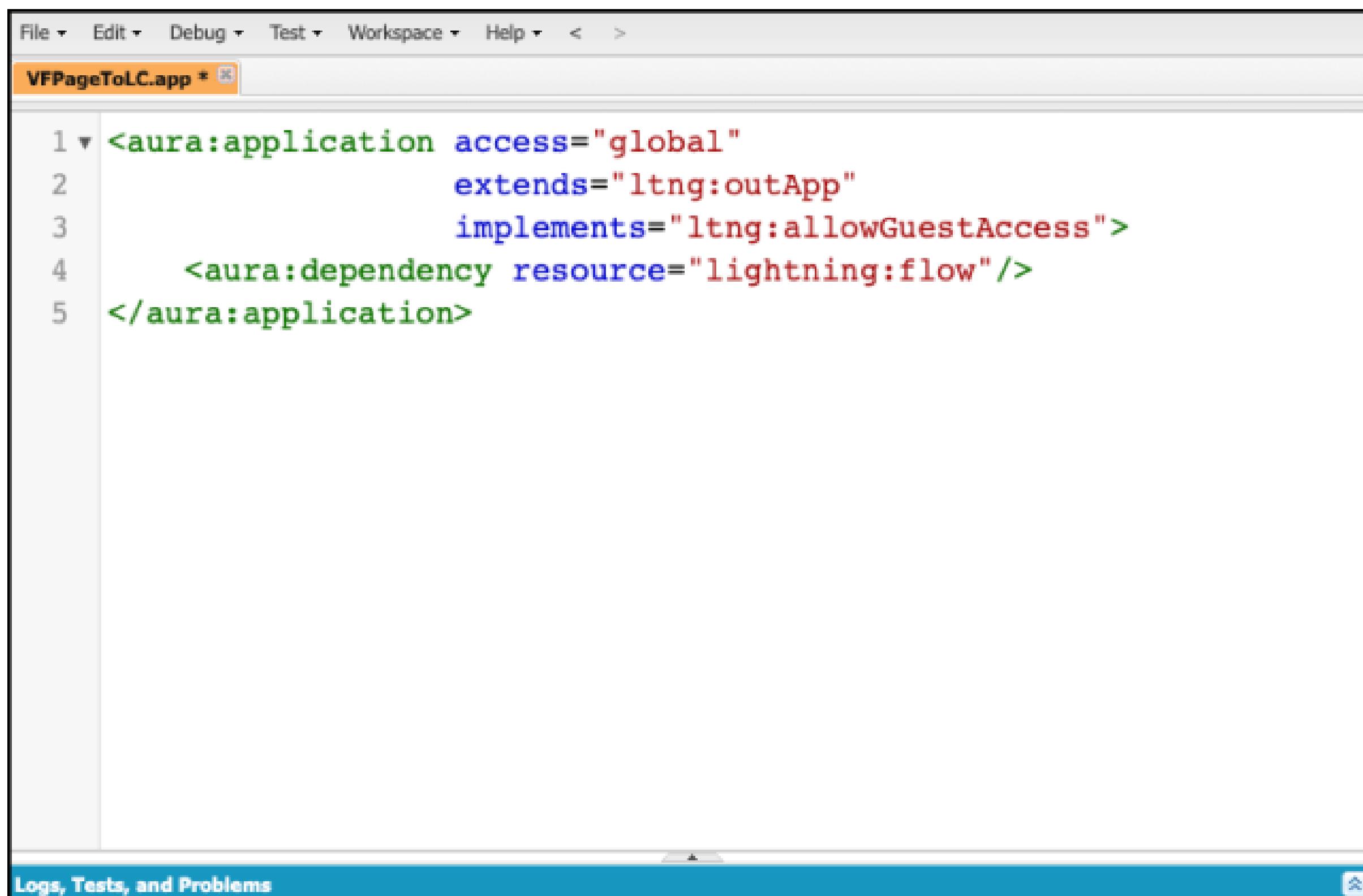
Cancel Save



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 (VFPageTLC) 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.



```
File Edit Debug Test Workspace Help < >
VFPageToLC.app * [x]
1 <aura:application access="global"
2             extends="ltng:outApp"
3             implements="ltng:allowGuestAccess">
4     <aura:dependency resource="lightning:flow"/>
5 </aura:application>
Logs, Tests, and Problems
```

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

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

Add the Lightning Components for Visualforce JavaScript library to your Visualforce page using the `<apex:includeLightning/>` component. In the Visualforce page, reference the dependency

app. Then write a JavaScript function that creates the component on the page using \$Lightning.createComponent()

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

The screenshot shows the Visualforce Page Editor interface. At the top, there's a header with 'Visualforce Page' and the name 'Survey'. Below the header is a 'Page Edit' toolbar with buttons for 'Save', 'Quick Save', 'Cancel', 'Where is this used?', 'Component Reference', and 'Preview'. The main area is divided into sections: 'Page Information' (Label: Survey, Name: Survey, Description: empty), 'Available for Lightning Experience, Experience Builder sites, and the mobile app' (checkbox checked), and 'Require CSRF protection on GET requests' (checkbox unchecked). Below these sections is a tab bar with 'Visualforce Markup' (selected) and 'Version Settings'. The 'Visualforce Markup' tab contains a code editor with the following JavaScript 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
11       var statusChange = function (event) {
12         if(event.getParam("status") === "FINISHED") {
13           var outputVariables = event.getParam("outputVariables");
14           var key;
15           for(key in outputVariables) {
16             if(outputVariables[key].name === "myOutput") {
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     </script>
29   </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	
Site Contact	Rakesh Gupta
Default Record Owner	Rakesh Gupta
Default Web Address	http://katihar-developer-edition.gus.force.com/ survey
Active	<input checked="" type="checkbox"/>
Active Site Home Page	Survey [Preview]
Inactive Site Home Page	InMaintenance [Preview]
Site Template	SiteTemplate
Site Robots.txt	
Site Favorite Icon	
Analytics Tracking Code	
URL Rewriter Class	
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

First Name

Alok

Last Name

Sinfal

*Email

*Rating

5

*Comment

Awesome Blog

G

Next

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

