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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.

Setup Home Object Manager

New Custom Object

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

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

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

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

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

Object Name: Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Context Name:

Enter Record Name Label and Format

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

Record Name: Example: Account Name

Data Type:

Optional Features

☐ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing [j](#)

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, specifically the Object Manager section. The page title is "New Custom Object". A yellow banner at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Take me there!](#) [Don't show this message again](#)".

The main section is "Custom Object Definition Edit" with buttons for "Save", "Save & New", and "Cancel". It is divided into several sections:

- Custom Object Information:**
 - Label:** "department" (Example: Account)
 - Plural Label:** "departments" (Example: Accounts)
 - Starts with vowel sound:** ☐
 - Object Name:** "department" (Example: Account)
 - Description:** (Empty text area)
 - Context-Sensitive Help Setting:**
 - ☒ Open the standard Salesforce.com Help & Training window
 - ☐ Open a window using a Visualforce page
 - Context Name:** "Accounts" (dropdown menu)
- Enter Record Name Label and Format:**
 - Record Name:** "Department Name" (Example: Account Name)
 - Data Type:** "Text" (dropdown menu)
- Optional Features:**
 - ☐ Allow Reports
 - ☐ Allow Activities
 - ☐ Track Field History
 - ☐ Allow in Chatter Groups
 - ☐ Enable Licensing
- Object Classification:**
 - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)
 - ☒ Allow Sharing
 - ☒ Allow Bulk API Access
 - ☒ Allow Streaming API Access
- Deployment Status:**
 - ☐ In Development
 - ☒ Deployed
- Search Status:**
 - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)
 - ☐ Allow Search
- Object Creation Options (Available only when custom object is first created):**
 - ☐ Add Notes and Attachments related list to default page layout
 - ☐ Launch New Custom Tab Wizard after saving this custom object

At the bottom, there are buttons for "Save", "Save & New", and "Cancel".

Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College__c" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."

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

Setup > OBJECT MANAGER

CDepartment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

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

Edit

Delete

Setup > OBJECT MANAGER

CDepartment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

CDepartment

New Relationship

Help for this Page

Step 3 of 6

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

Previous

Next

Cancel

Field Label

colloge

Field Name

colloge

Description

Help Text

Child Relationship Name

CDepartments

Sharing Setting

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

☐ Read/Write. Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting

☐ Child records can be reparented to other parent records after they are created.

Auto add to custom report type

☒ Add this field to existing custom report types that contain this entry.

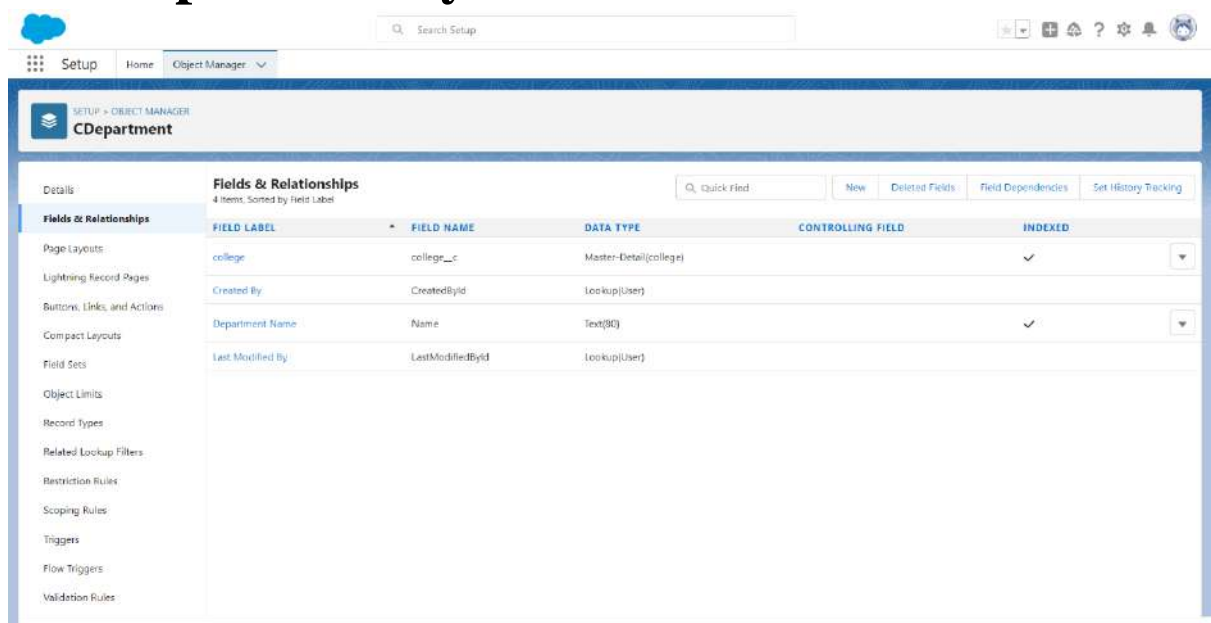
Lookup Filter

The screenshot displays the 'CDepartment' Setup - Object Manager interface. The left-hand navigation pane includes links to various setup areas: Setup, Home, Object Manager, Details, Fields & Relationships (active), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'New Custom Field' and is in 'Step 1: Choose the field type'. It instructs the user to 'Specify the type of information that the custom field will contain.' Under the 'Data Type' section, several options are listed with radio buttons: 'None Selected', 'Auto Number', 'Formula', 'Roll Up Summary', 'Lookup Relationship', 'Master Detail Relationship' (which is selected), and 'External Lookup Relationship'. Each option is accompanied by a description of its function and, in some cases, a bulleted list of specific behaviors or requirements.

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

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

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



The screenshot shows the Salesforce Object Manager interface for creating a new custom field. The left sidebar contains navigation links: Setup, Home, and Object Manager. The main header area displays 'SETUP > OBJECT MANAGER' and the 'college' logo. The page title is 'New Custom Field'. The 'Fields & Relationships' tab is active in the left sidebar. The main content area shows a table with the following details:

Field Label	Total Count
Data Type	Roll-Up Summary
Field Name	Total_Count
Description	

Below the table, there is a section for selecting page layouts to add the field to. It includes a checkbox for 'Add Field' and a list of page layouts: 'Page Layout Name' and 'collage Layout'. The page is marked as 'Step 5 of 8'.

SetupHomeObject Manager

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Step 4 of 5

Step 4. Establish field-level security

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	<input type="checkbox"/> Write	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Finance.com - Axis Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SetupHomeObject Manager

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Step 3 of 5

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: college

Summarized Object: CDepartments

Select Roll-Up Type

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate: --Select--

Filter Criteria

☒ All records should be included in the calculation

☐ Only records meeting certain criteria should be included in the calculation

college

Setup

Home

Object Manager

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Step 2. Enter the details

Step 2 of 5

Field Label

Total count

Field Name

Total_count

Description

Help Text

Auto add to custom report type

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

Previous

Next

Cancel

college

Setup

Home

Object Manager

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Step 1. Choose the field type

Step 1

Specify the type of information that the custom field will contain

Data Type

☐ None Selected

Select one of the data types below

☐ Auto Number

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

☐ Formula

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

☒ Roll-Up Summary

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

☐ Lookup Relationship

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

☐ Master-Detail Relationship

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

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

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.

☐ External Lookup Relationship

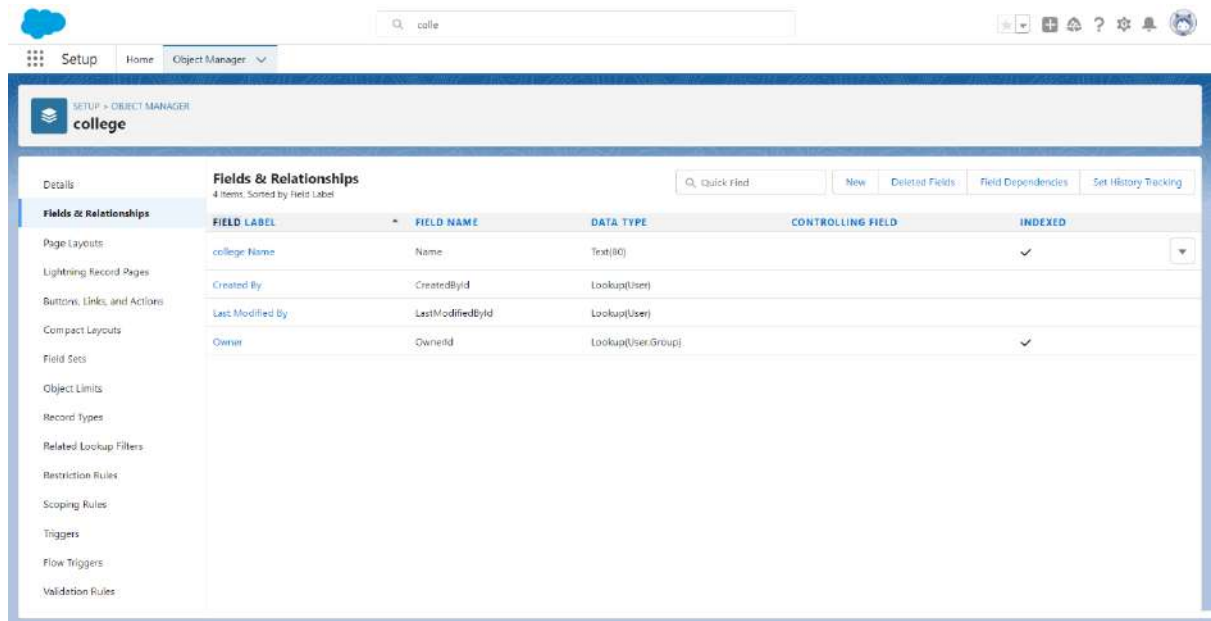
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☐ Picklist

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

Next

Cancel



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 for configuring a new custom object tab. The page is titled "New Custom Object Tab" and is part of the "Setup" section. It shows a list of user profiles and their corresponding tab visibility settings. The "Apply one tab visibility to all profiles" option is selected, and the default visibility is set to "Default On".

Step 2. Add to Profiles

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

☒ Apply one tab visibility to all profiles (Default On) ☐ Apply a different tab visibility for each profile

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

Previous Next Cancel

Setup

Home

Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Tab

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

SETUP

Tabs

Help for this Page

New Custom Object Tab

Step 1 of 3

Step 1. Enter the Details

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

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

Objectcollege

Tab StyleAccount

(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 LinkNone

Enter a short description

Description

NextCancel

Setup

Home

Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Tab

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

SETUP

Tabs

Help for this Page

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__Site)	<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__SalesforceCDS)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
Bot Solutions (standard__LightningBot)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

PreviousSaveCancel

Setup

Search Setup

Setup Lightning Experience App Manager

20 items • Sorted by App Name • Filtered by All appnames • TabSet Type

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

Setup

Home

Object Manager

Search Setup

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

Custom Tabs

Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New | What is This?

Action	Label	Tab Style	Description
Edit Del	Book1	Box	
Edit Del	Departments	Lightning	
Edit Del	colleges	Boxed	
Edit Del	Research Proposal	Square	
Edit Del	document	Box	

Web Tabs

New | What is This?

No Web Tabs have been defined

Visualforce Tabs

New | What is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New | What is This?

No Lightning component tabs have been defined

Lightning Page Tabs

New | What is This?


No Lightning Page Tabs have been defined

The picture can't be displayed.

Conclusion:


Now, whenever you create or update a record in the "Department__c" related to a "College__c," the "TotalCount__c" field on the "College__c" will automatically update to show the total number of related records.


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

 The picture can't be displayed.


 The picture can't be displayed.

 The picture can't be displayed.

 The picture can't be displayed.

 The picture can't be displayed.

 The picture can't be displayed.

 The picture can't be displayed.

The picture can't be displayed.

MECW

My college colleges CDepartments student Content

Search...



college mecw

New Contact Edit New Opportunity

Related Details

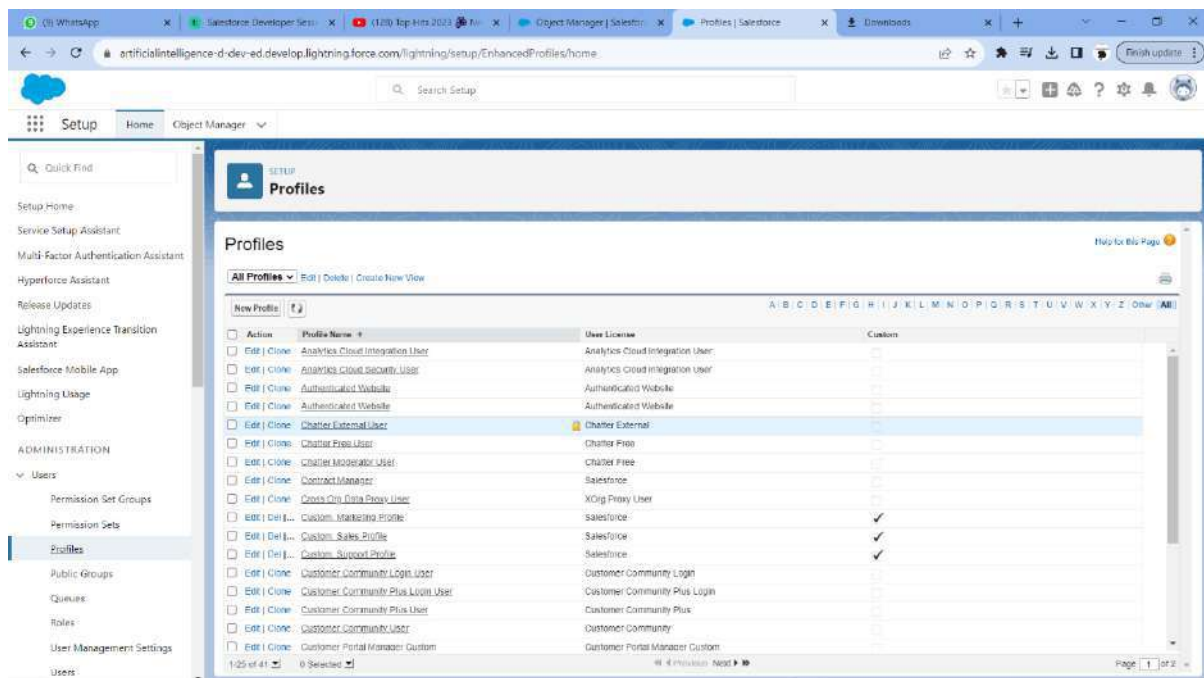
college Name	Owner
mecw	krishna s
Total count	
2	
phone	
9087116402	
Email	
ksr1@gmail.com	
Location	
90, 80	
Created By	Last Modified By
krishna s , 01/10/2023, 11:16 am	krishna s , 01/10/2023, 11:19 am

History

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

Solution:

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



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

Profiles

1-7 of 7 0 Selected

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 Clone	SalesManager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Sales 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"/>

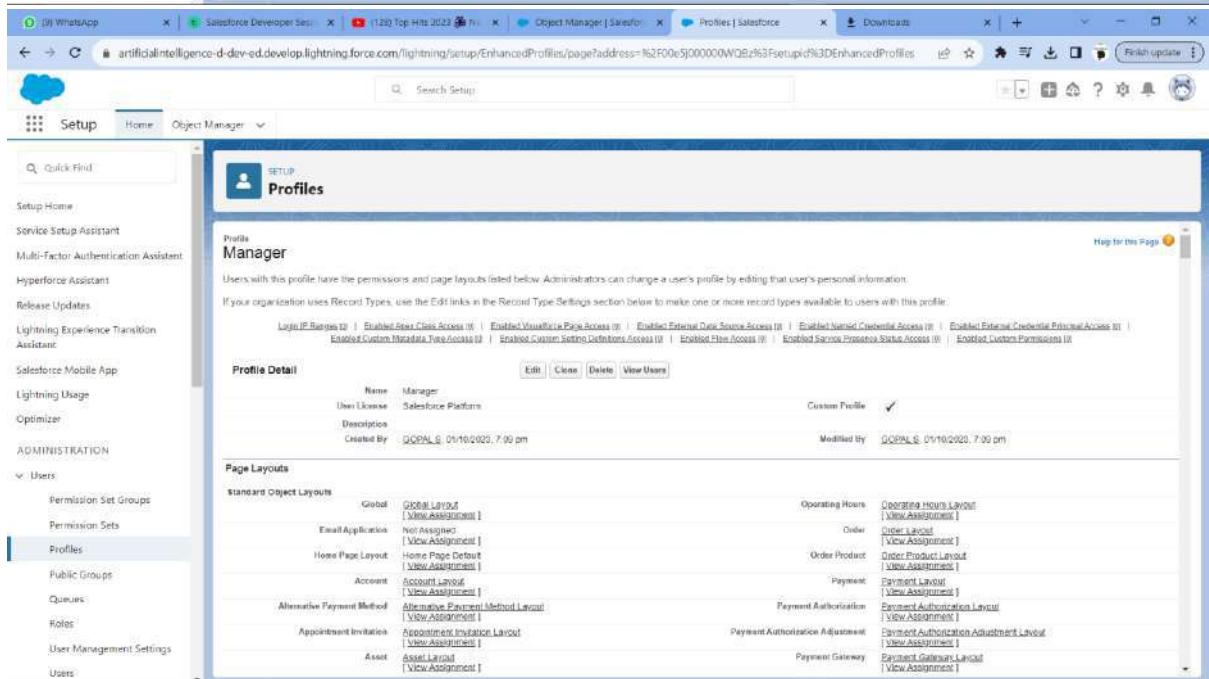
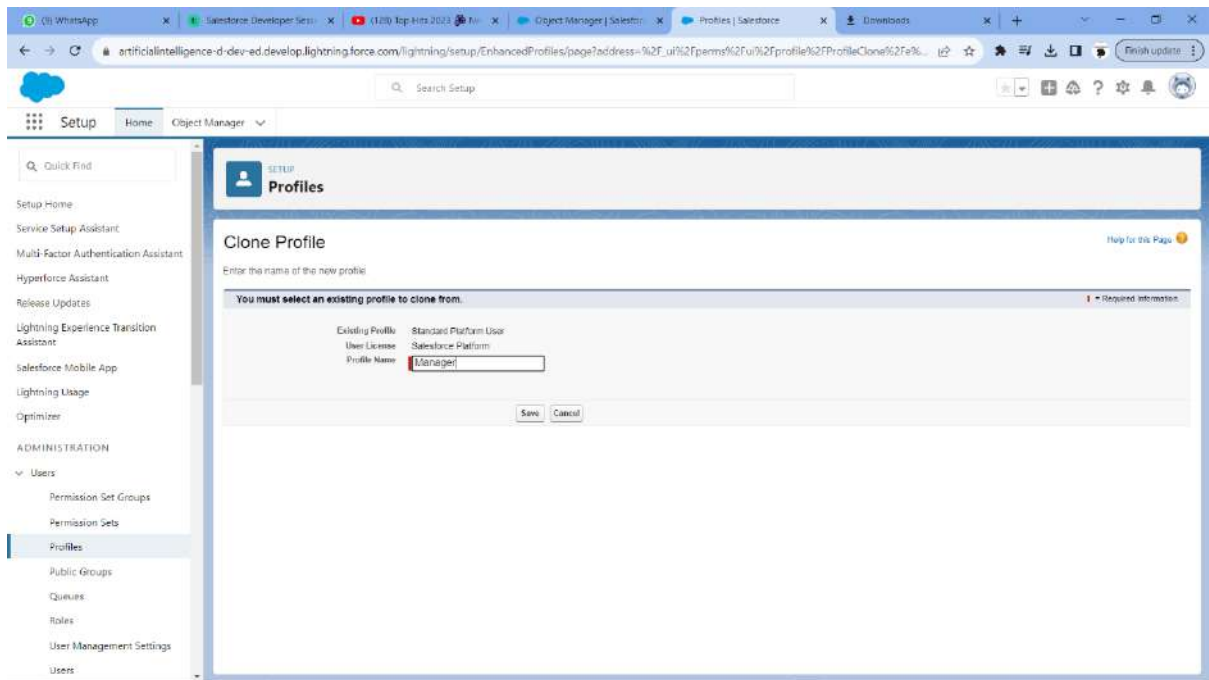
Clone Profile

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	<input type="text"/>

Save Cancel



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, Queue, Roles, User Management Settings, Users

Profiles

Manager

Set the permissions and page layouts for this profile

Profile Edit

Name: Manager, User License: Salesforce Platform, Custom Profile: ☒

Custom App Settings

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

Service Provider Access

Tab Settings

☐ Overwrite users' personal tab customizations

Standard Tab Settings: Home: Default On, Accounts: Default On, Alerts: Default On, Lending: Default On, Libraries: Tab Hidden, Lightning Bolt Solutions: Default On

Profiles

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

Custom Object Permissions

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

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Profiles

	Basic Access					Data Administration		Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All	
Contact Point Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answers for password resets: ☐

Requires a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Profiles

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

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Lockout effective period: 15 minutes

Obscure secret answers for password resets: ☐

Requires a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

Setup Profiles

Custom Object Permissions

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

Session Settings

Session Timeout 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 login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password: ☐

Requires a minimum 1 day password: ☐

Don't immediately expire links in target password emails: ☐

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 User

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adriana Cruz	adrian	test_cruz_pas_def@pdxhulk.hzrnsbkox.3g8bfhczvms.h43hazwfmiaa@gmail.com		<input checked="" type="checkbox"/>	System User
<input type="checkbox"/> Edit	Chatter Enzel	Chatter	chattv-005000006cokkxat.b00fwmvcoke@chattersalesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Elindon Amelia	aeli	amelia.elindon.1.48xsc6oc0h.05owdcupwkh.1nbdemvshfzq.ayucul.f.dely@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	3-SCRAL	33	hsq220@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@005000006cokkxat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	usay10secuirty@005000006cokkxat.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

Setup Home Object Manager

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

PLATFORM TOOLS

- Data
- Email
- Apps

Users

New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division

Role: <None Specified>
User License: Salesforce Integration
Profile: Salesforce API Only System Integrations
Active: ☒
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flow User: ☐
Service Cloud User: ☐
Stm.com Contributor User: ☐
Stm.com Publisher User: ☐
WDC User: ☐
Data.com User Type: --None--
Data.com Monthly Addition Limit: Default Limit (200)
Accessibility Mode (Classic Only): ☐
High Contrast Palette on Charts: ☐
Load Lightning Pages While Scrolling: ☒
Debug Mode: ☐

Setup Home Object Manager

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ADMINISTRATION

- Users
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- Queues
- Roles
- User Management Settings

PLATFORM TOOLS

- Data
- Email
- Apps

Users

New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name: Sowmya
Last Name: Irala
Alias: soala
Email: 2k20cse175@kiot.ac.in
Username: 2k21n@kiot.ac.in
Nickname: User169616771282564528
Title: worker
Company: kiot bank
Department:
Division:

Role: <None Specified>
User License: Salesforce Platform
Profile: Manager
Active: ☒
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flow User: ☐
Service Cloud User: ☐
Stm.com Contributor User: ☐
Stm.com Publisher User: ☐
WDC User: ☐
Data.com User Type: --None--
Data.com Monthly Addition Limit: Default Limit (200)
Accessibility Mode (Classic Only): ☐
High Contrast Palette on Charts: ☐
Load Lightning Pages While Scrolling: ☒
Debug Mode: ☐

Setup | Home | Object Manager

Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer

ADMINISTRATION
Users

Users

sowmiya bala

Permission Set Assignments (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail

Name	sowmiya bala	Role	Salesforce Platform
Alias	sba18	User License	Platform
Email	2620cse17a@sat.ac.in (Web)	Profile	Manager
Username	26210@MOL.AC.IN	Active	<input checked="" type="checkbox"/>
Nickname	User16951677128256422616	Marketing User	<input type="checkbox"/>
Title	worker	Offline User	<input type="checkbox"/>
Company	kkt bank	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Sales.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input checked="" type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registrations: One-Time Password Authenticator	<input type="checkbox"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authentication	<input type="checkbox"/>	Salesforce CRM Content User	<input checked="" type="checkbox"/>

mail.google.com/mail/u/0/#inbox/7Mf0gz0bStlGsqKkLzCGhbDnsCk0v1

Compose

Inbox 5,318

Starred

Snoozed

Sent

Drafts

More

Labels

support@salesforce.com <support@salesforce.com>

7:15 PM (0 minutes ago)

1 of 6,456

salesforce

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:

<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>


Username:

26210@kkt.ac.in

Again, welcome to Salesforce!

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artificialintelligence-d-dev-ed.develop.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&satupid=Ch...



Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password: Good

* Confirm New Password: Match

Security Question


* Answer:

[Change Password](#)

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

Login | Salesforce

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



Username

Password


[Log In](#)

☐ Remember me

[Forgot Your Password?](#)

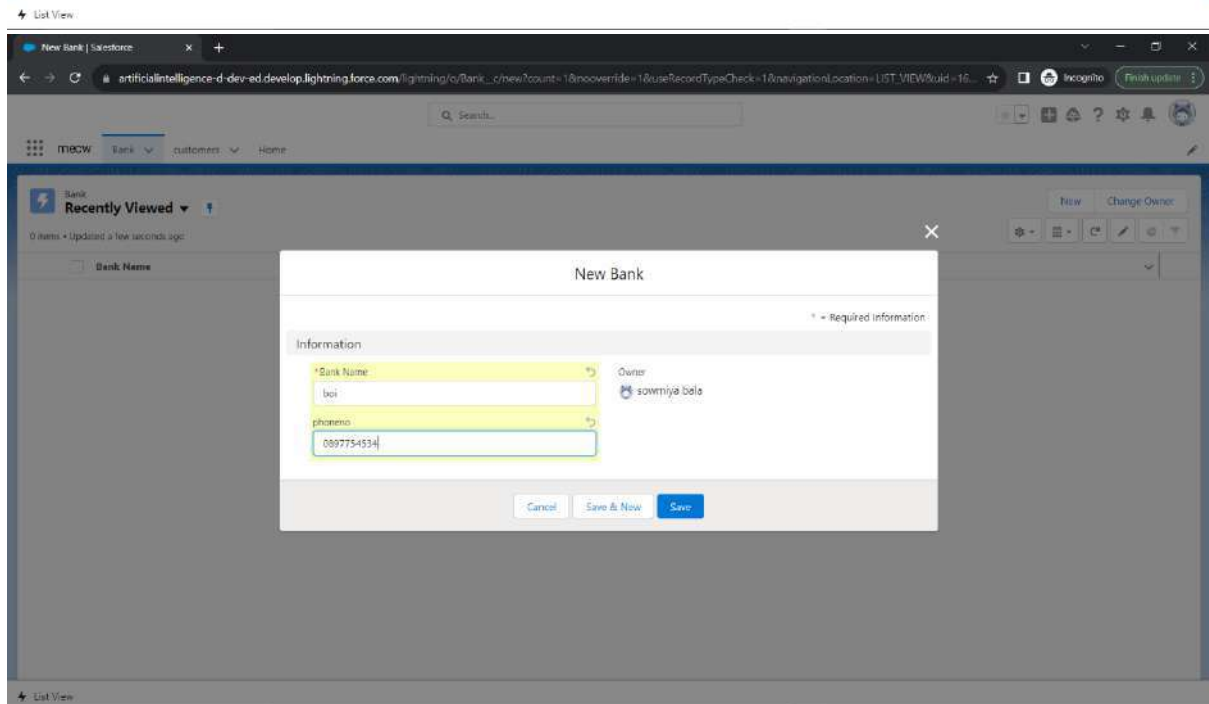
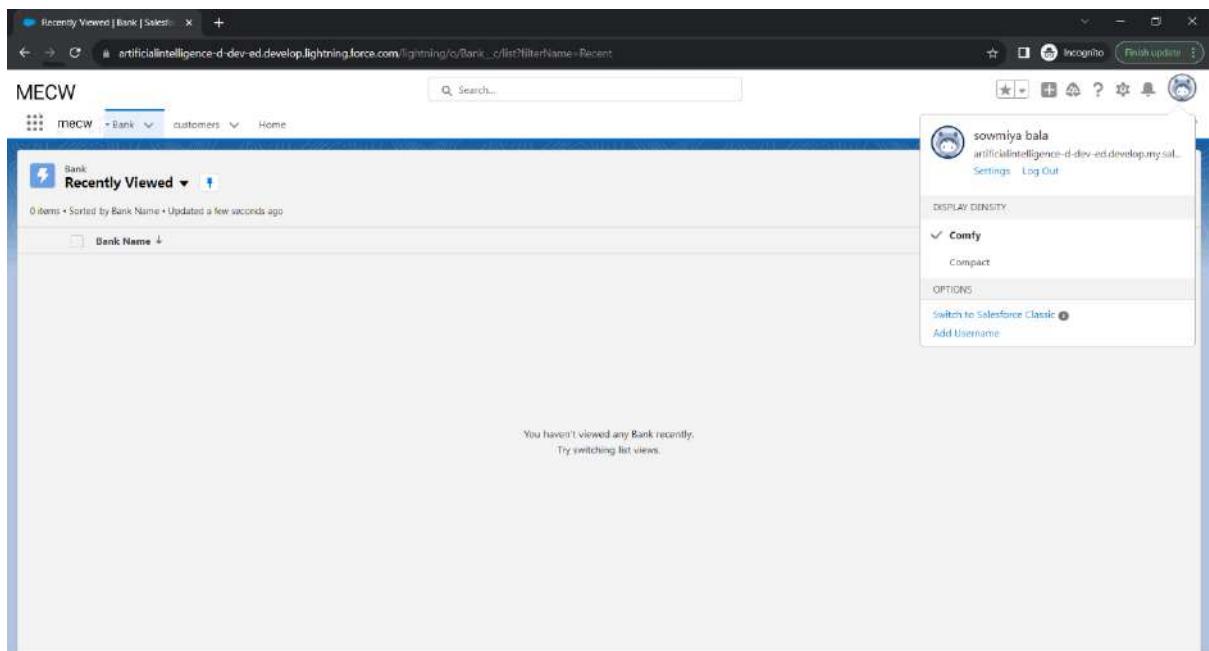
Join us for the future of
trusted enterprise AI,
streaming on Salesforce+.

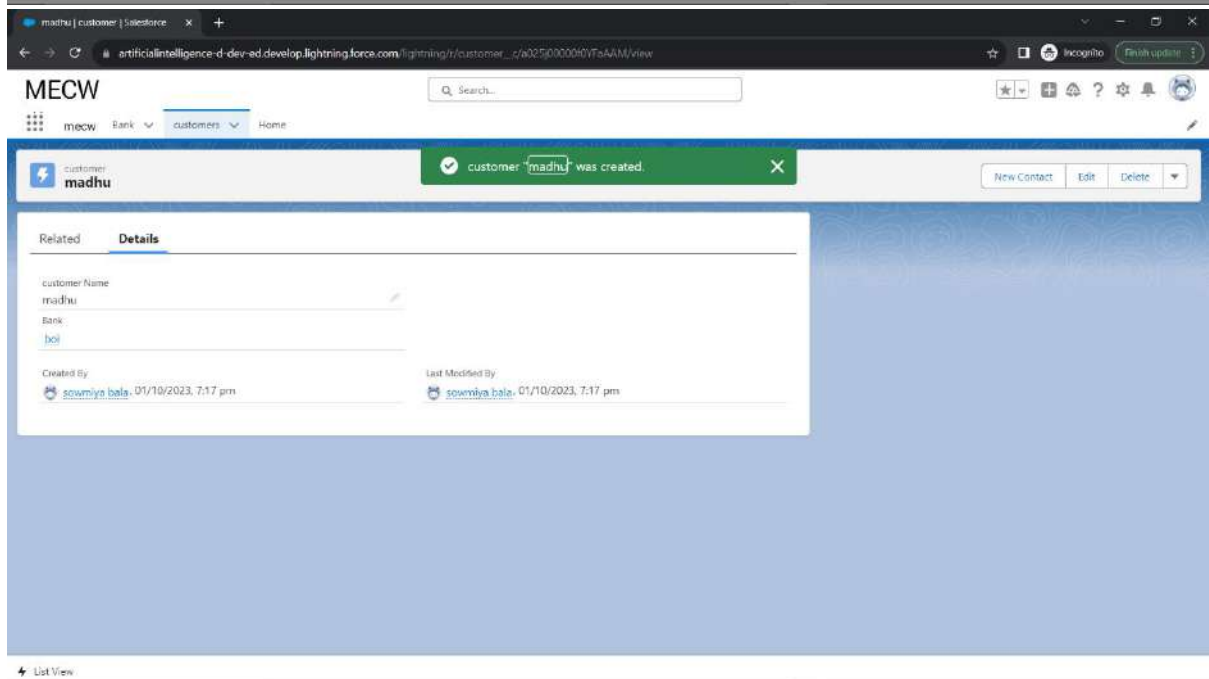
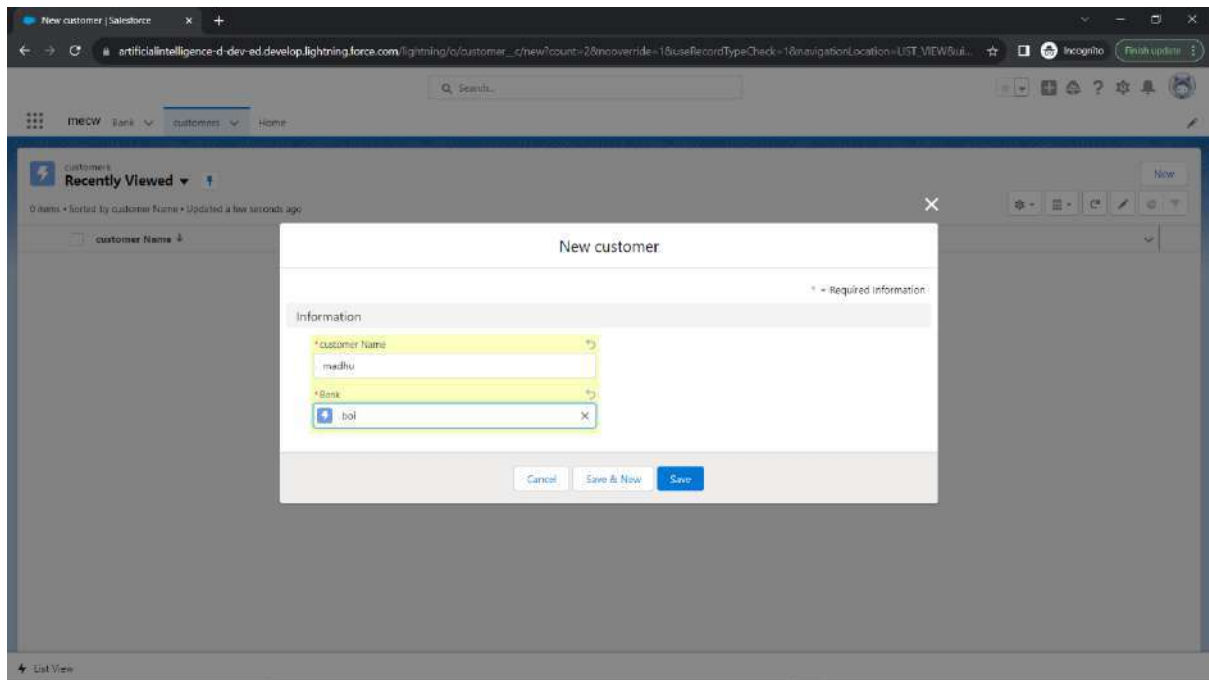
[WATCH ON DEMAND](#)



AI Day

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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

Profiles

All Profiles | Edit | Delete | Create New View

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 Clone	SalesManager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Sales 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"/>

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	<input type="text" value="salesmanager"/>

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

Profiles

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.

Logins IP Ranges (2) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled External Credential Access (0) | Enabled External Credential Personal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Provider Status Access (0) | Enabled Custom Permissions (0)

Profile Detail | Edit | Clone | Delete | View Users

Name	salesmanage	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	QOPALS, 01/10/2020, 7:10 pm	Modified By	QOPALS, 01/10/2020, 7:10 pm

Page Layouts

Standard Object Layouts	Global: Global Layout (View Assignments)	Operating Hours: Operating Hours Layout (View Assignments)
Email Application	Not Assigned (View Assignments)	Order: Order Layout (View Assignments)
Home Page Layout	Home Page Default (View Assignments)	Order Product: Order Product Layout (View Assignments)
Account	Account Layout (View Assignments)	Payment: Payment Layout (View Assignments)
Alternative Payment Method	Alternative Payment Method Layout (View Assignments)	Payment Authorization: Payment Authorization Layout (View Assignments)
Appointment Invitation	Appointment Invitation Layout (View Assignments)	Payment Authorization Adjustment: Payment Authorization Adjustment Layout (View Assignments)
Asset	Asset Layout (View Assignments)	Payment Gateway: Payment Gateway Layout (View Assignments)

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

Profiles

salesmanage

Set the permissions and page layouts for this profile.

Profile Edit | Save | Save & New | Cancel

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

Custom App Settings | Required Information

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

Service Provider Access

Tab Settings

☐ Override user's personal tab customizations

Standard Tab Settings

Name	Default On	Learning	Default On
------	------------	----------	------------

Setup | Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

Setup | Profiles

Custom Object Permissions

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

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Minimum password length: 8

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Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

Save Save & New Cancel

Setup Home Object Manager

Search Setup

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

New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only)

High Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Required Information

Setup Home Object Manager

Search Setup

user

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Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Setup Users

New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name: msdhu

Last Name: h

Alias: mb

Email: 2620cse175@knot.ec.in

Username: 2620cse1@knot.ec.in

Nickname: User169616842426654192

Title: worker

Company: knot bank

Department: Sales

Division:

Role: <None Specified>

User License: Salesforce Platform

Profile: salesmanage

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Data.com User Type: --None--

Data.com Monthly Addition Limit: Default Limit (200)

Accessibility Mode (Classic Only): ☐

High Contrast Palette on Charts: ☐

Load Lightning Pages While Scrolling: ☒

Debug Mode: ☐

Required Information

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

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Public Groups

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Actions & Recommendations

App Menu

Setup Users

Mailing Address

Street

City

Zip/Postal Code

Status/Province

Country

Single Sign On Information

Federation ID

Locale Settings

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

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Recycle Approval Request Enable Only if I am an approver

Generate new password and notify user immediately

Save Save & Now Cancel

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

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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 4/104 - aryanpatayam, uthamasalapuram...

City SALEM

Zip/Postal Code 636308

Status/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

Recycle Approval Request Enable Only if I am an approver

Generate new password and notify user immediately

Save Save & Now Cancel

Salesforce Developer Edition Setup Page

Setup > Users > User Management Settings > Users

User: madhu b

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail

Name	madhu b	Role	Salesforce Platform
Alias	mb	User License	salesmanage
Email	2k20cs17a@kict.ac.in (Verify)	Profile	Active
Username	2k20cs17a@kict.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User16951684242865419206	Offline User	<input type="checkbox"/>
Title	worker	Knowledge User	<input type="checkbox"/>
Company	kict bank	Flow User	<input type="checkbox"/>
Department	Sales	Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	4154, arampalayam, uttamasaparam, Parakkadu, salem-636308, SALEM 636308, TAMIL NADU	Slack.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Web User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	Web
Language	English	Data.com User Type	
Manager		Accessibility Mode (Classic Only)	
Receive Approval Request Emails	Only if I am an approver	Debug Mode	
Telemetry ID		High-Contrast Palette on Charts	
App Registration One-Time Password Authentication		Load Lightning Pages While Scrolling	

Gmail Interface

Compose

Inbox: 5,318

Starred

Snoozed

Sent

Drafts

More

Labels

Search in mail

Active

Knowledge

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:

2k20cs17a@kict.ac.in

Again, welcome to Salesforce!

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

1 of 6,456

Reply Forward

Change Your Password | Salesforce

artificialintelligence-d-dev-ed.develop.my.salesforce.com/.../system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp%3FfromFrontdoor=1&stupid=ChangePa...

salesforce

Change Your Password

Enter a new password for 2k20cit@klotac.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:

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

MECW

MECW Bank customers Home

Search...

Bank

Recently Viewed

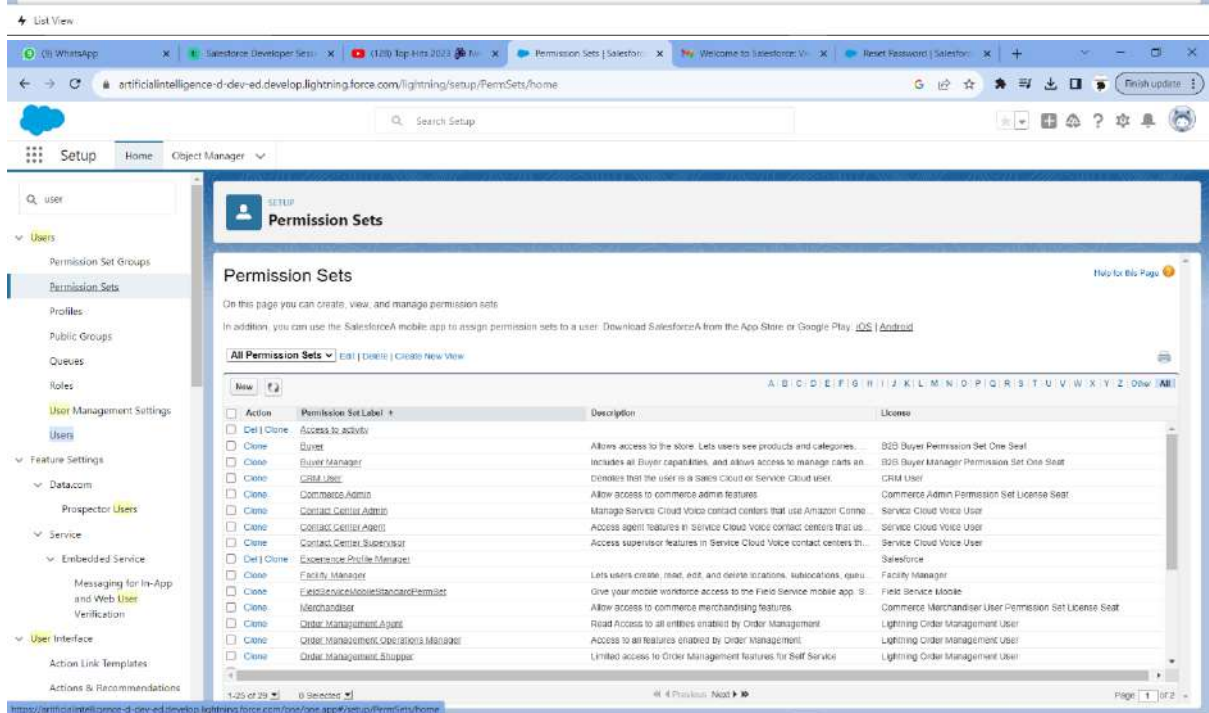
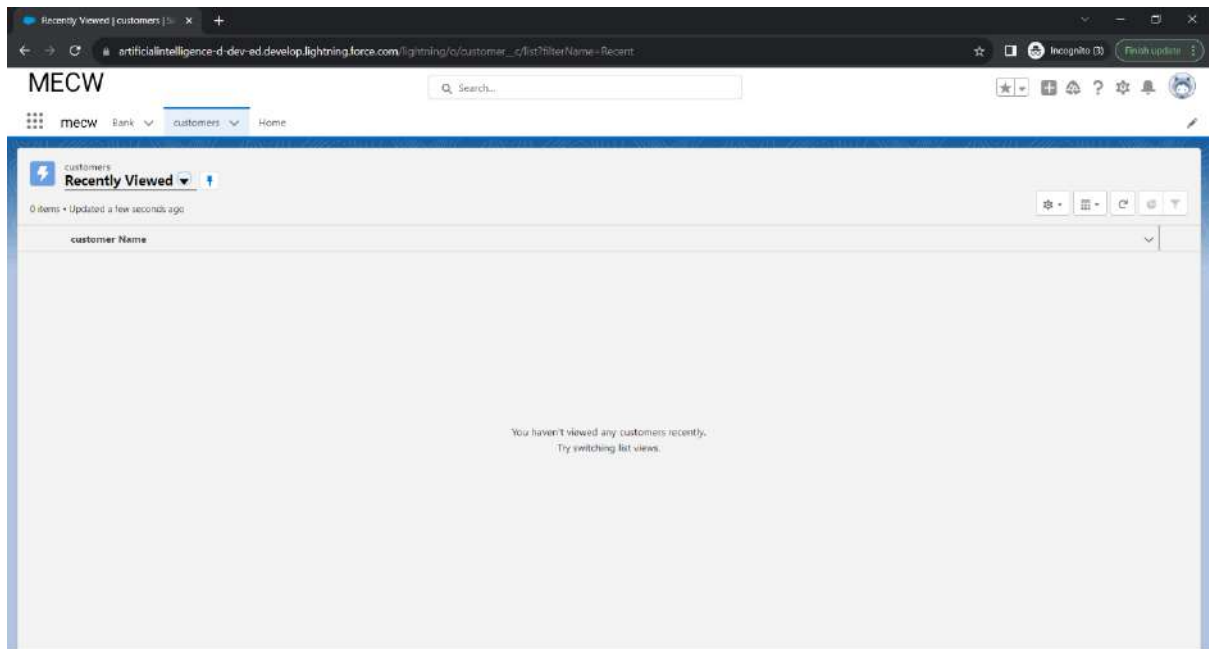
0 items • Updated a few seconds ago

Bank Name

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

Now

List View



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 I-Jser A and I-Jser 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 IJser B with user B.
- For the sharing rule criteria, specify that records owned by User A are shared with user A, and records owned by User B are shared with User B.

Ownership:

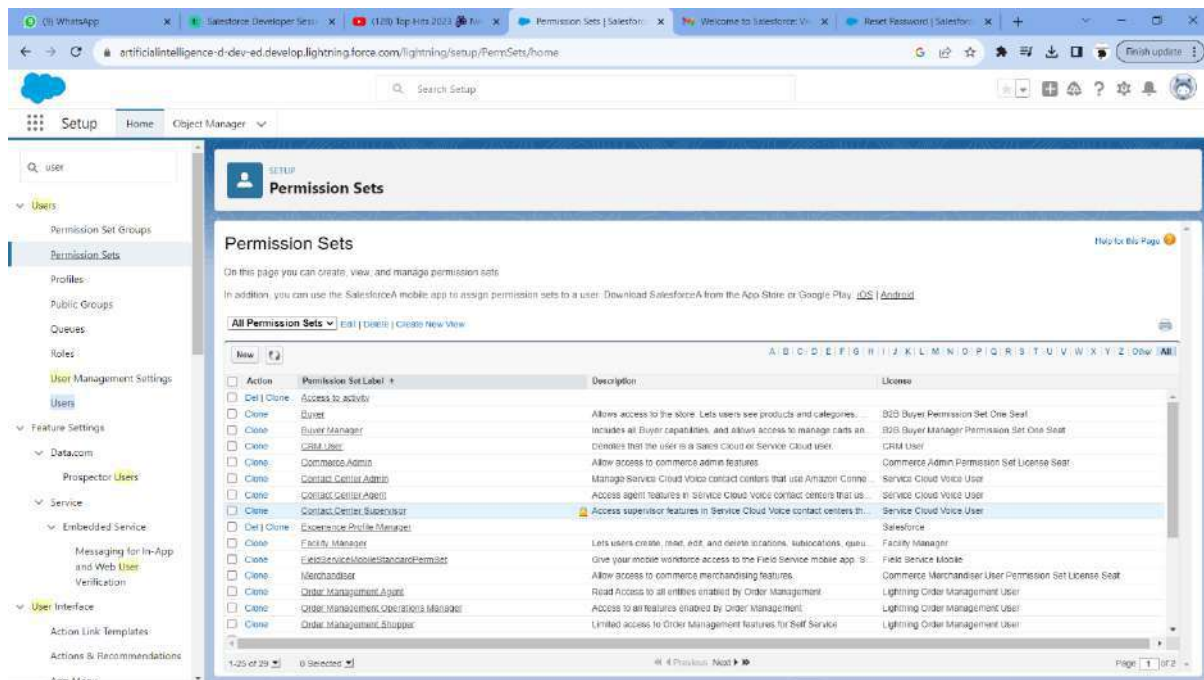
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

Organization-Wide Defaults:

- Set the organization-wide defaults for the Account object to "Private" to ensure that records are private by default.

Testing:

- Test the setup by logging in as User A and User B separately to verify that they cannot access each other's records.



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

Setup Home Object Manager

Q: 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

Permission Sets

Create

Enter permission set information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

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

-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [LEARN MORE HERE.](#)

License

Save Cancel

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

Setup Home Object Manager

Q: user

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Enter permission set information

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

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-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [LEARN MORE HERE.](#)

License

Save Cancel

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000000Phok%3FsfcdFrameOrigin%3Dhttps%253A...

Setup Home Object Manager

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

Feature Settings

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Permission Sets

Permission Set: salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name: salesmanager
License	Nonrenewable Profile
Session Activation Required	Created By: Gopal S. 01/10/2023, 7:29 pm
Last Modified By: Gopal S. 01/10/2023, 7:29 pm	

Apps

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

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

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

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

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000000Phok%3FsfcdFrameOrigin%3Dhttps%253A...

Setup Home Object Manager

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
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- User Management Settings
- Users

Feature Settings

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Permission Sets

Permission Set: salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview -> Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	—
AI Insight Reasons	No Access	—	—
AI Record Insights	No Access	—	—
Alternating Payment Methods	No Access	27	—
API Anomaly Event Stores	No Access	14	—
App Analytics Query Requests	No Access	—	—
Application Usage Assessments	No Access	—	—
Appointment Categories	No Access	9	—
Appointment Invitations	No Access	17	—
Appointment Invites	—	4	—
Appointment Schedule Agreements	No Access	—	—
Appointment Schedule Logs	No Access	—	—
Appointment Time Slots	No Access	6	—
Asset Actions	No Access	50	—
Asset Action Sources	No Access	18	—
Asset Relationships	—	10	—
Assets	No Access	42	—
Asset Sizing Periods	No Access	11	—

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55000000Phok%3F%3DEntityPermissions%26o%3D...

Setup Home Object Manager

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
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Feature Settings

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- Verification

User Interface

- Action Link Templates
- Actions & Recommendations

Permission Sets

Permission Set: salesmanager

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank Edit

Tab Settings

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

Object Permissions

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

Field Permissions

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55000000Phok%3F%3DEntityPermissions%26o%3D...

Setup Home Object Manager

user

Users

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- App Menu

Permission Sets

Permission Set: salesmanager

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank Save Cancel

Tab Settings

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

Object Permissions

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

Field Permissions

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/000000Phok/PermissionSetAssignment/home

Setup Home Object Manager

Q user

Users

- Permission Set Groups
- Permission Sets
- Profiles
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salesmanager

Current Assignments

No assignments defined.

Add Assignment

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/000000Phok/PermissionSetAssignment/new

Setup Home Object Manager

Q user

Users

- Permission Set Groups
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Select Users to Assign

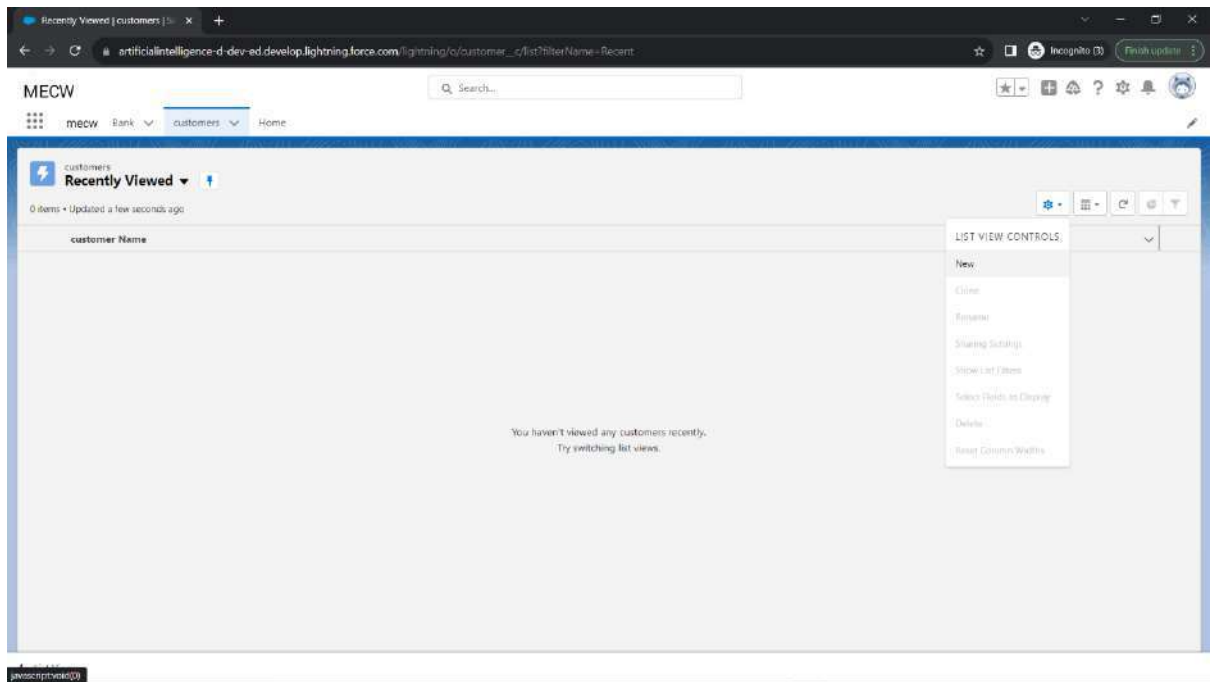
All Users

1 item selected

Search this list...

	Full Name	All...	Username	Role	Ac...	Profile
<input type="checkbox"/>	Amelia Ellington	aeili	amelia.ellington146vxp8oodlh6cnpdclou4wftmbdwmvwhqwguctprfdalv@gmail.com	<input checked="" type="checkbox"/>		Force.com - App Subscription User
<input type="checkbox"/>	Chatter Expert	Chatter	chatty60d5j00000bskkwab.fc0bhwmpqlkx@chatter.salesforce.com	<input checked="" type="checkbox"/>		Chatter Free User
<input type="checkbox"/>	Diya Adanne	dadani	test_diya_pas4w6b7yb9wlc.tzprgzbkxps.3gltolovouns.N413bkw6mea@gmail.com	<input checked="" type="checkbox"/>		UIMS User
<input type="checkbox"/>	GOPAL S	GS	knots20@gmail.com	<input checked="" type="checkbox"/>		System Administrator
<input type="checkbox"/>	Integration User	Integ	Integration@000d3j000000cukkeab.com	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
<input checked="" type="checkbox"/>	maithu b	mb	2k20cch@idiot.ac.in	<input checked="" type="checkbox"/>		salesmanager
<input type="checkbox"/>	Security User	sec	insightssecurity@000d3j000000bskkwab.com	<input checked="" type="checkbox"/>		Analytics Cloud Security User
<input type="checkbox"/>	sowmiya bala	sbala	2k21h@idiot.ac.in	<input checked="" type="checkbox"/>		Manager

Cancel Next

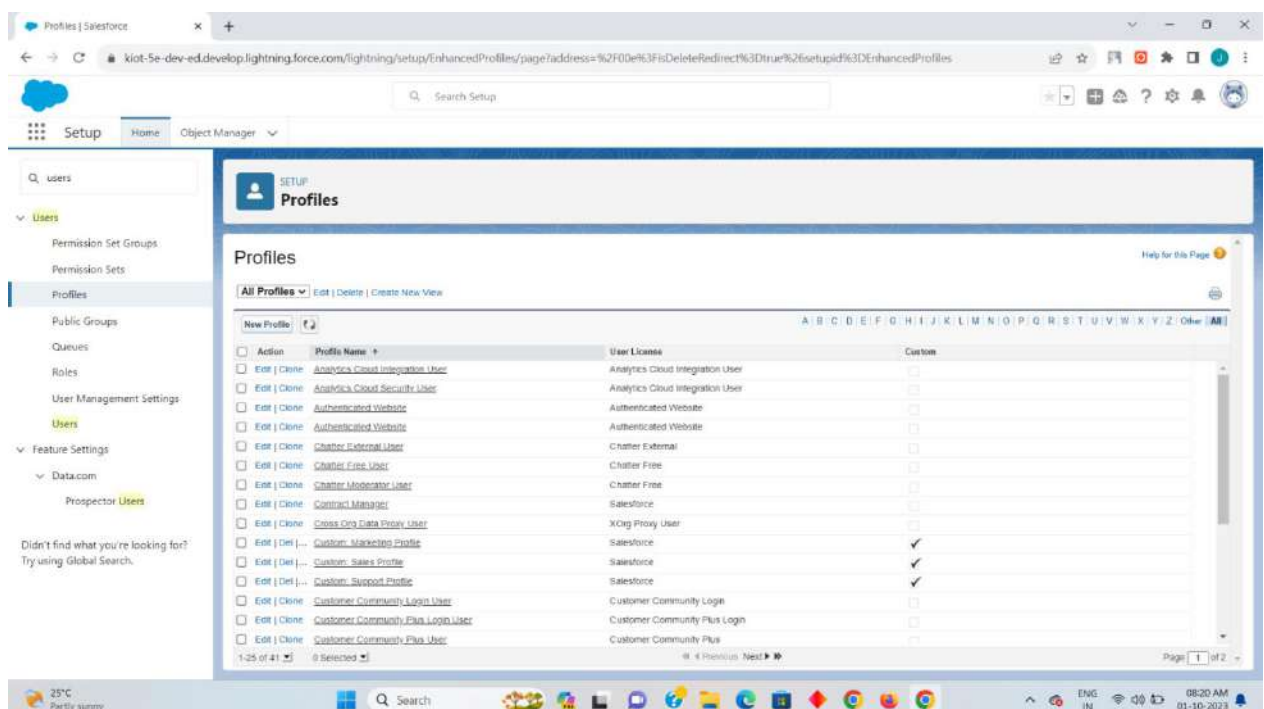


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

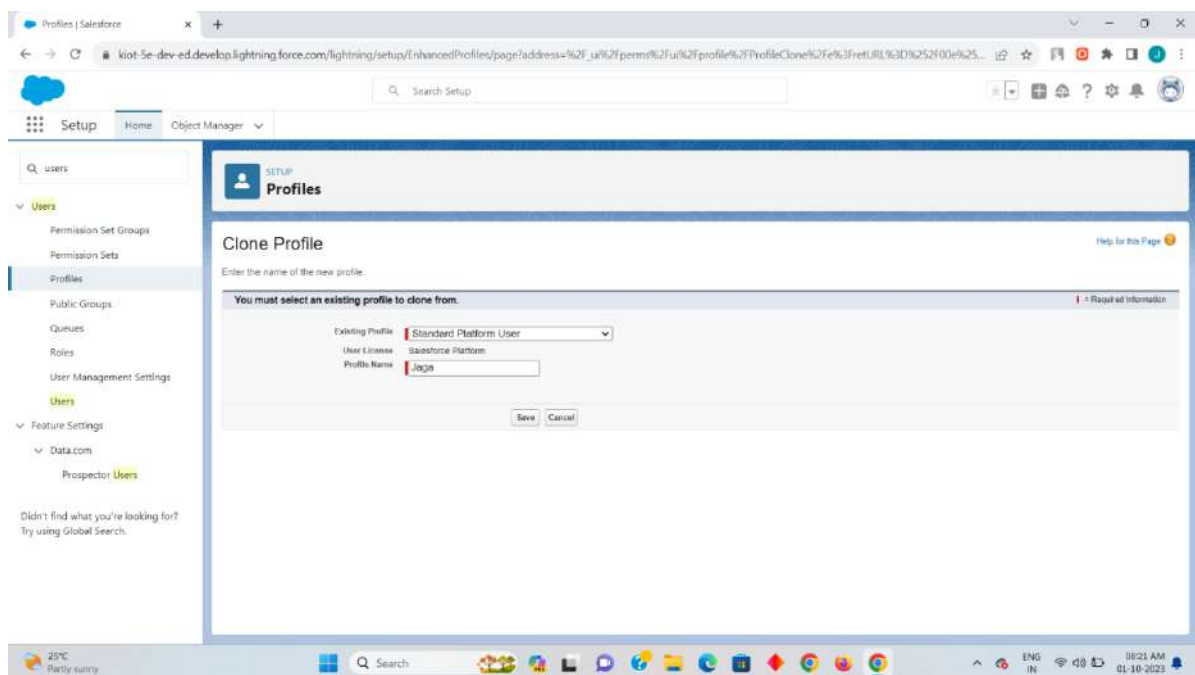
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

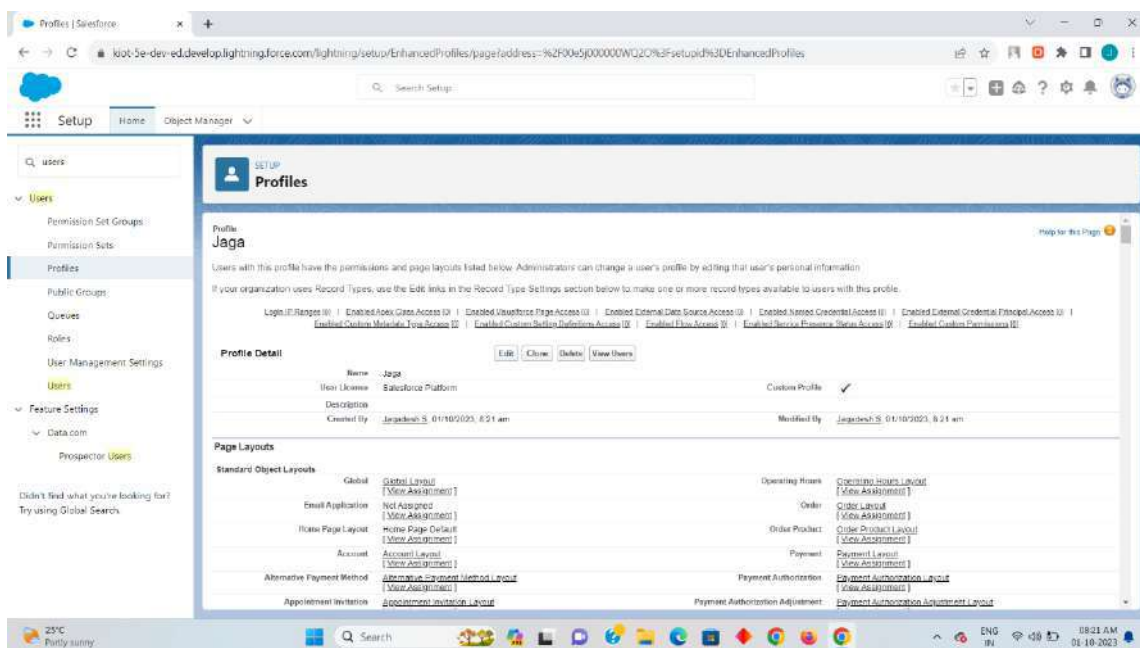
Click on the new to create a new profile along with the label and Api



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 interface for a user profile named 'Jaga'. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area displays the 'Profile: Jaga' details, including a list of permissions (Login, Apex, Visualforce, External Data Source, External Credential, External Credential Principal, Custom Metadata Type, Custom Settings, Custom Definition, Custom Page, Custom Permission) and a section for 'Page Layouts'. The 'Page Layouts' section is divided into 'Standard Object Layouts' and 'Custom Object Layouts'. The 'Standard Object Layouts' table lists various objects and their assigned layouts, while the 'Custom Object Layouts' table lists custom objects and their assigned layouts. The bottom of the screen shows a Windows taskbar with the date and time.

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

Profiles | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/enhancedProfiles/page/address=%2F000000WQ20%2F%3F%2FURL%3D%2F000000WQ20%2F%253Fsetupid...

Search Setup

Setup Home Object Manager

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.

SETUP Profiles

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"/>

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

Custom Object Permissions

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

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

Session Settings

Session Times Out After:

Session Security Level Required at Login:

Enable different Experience Cloud login policies for employees: ☐

Separate Experience Cloud sites and Salesforce login authentication for employees: ☐

Relax login IP restrictions: ☐

Skip employee device activation during Experience Cloud site login: ☐

Profiles | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/enhancedProfiles/page/address=%2F000000WQ20%2F%3F%2FURL%3D%2F000000WQ20%2F%253Fsetupid...

Search Setup

Setup Home Object Manager

users

Users

- Permission Set Groups
- Permission Sets
- Profiles
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Feature Settings

- Data.com
- Prospector Users

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

SETUP Profiles

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"/>

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

Custom Object Permissions

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

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

Session Settings

Session Times Out After:

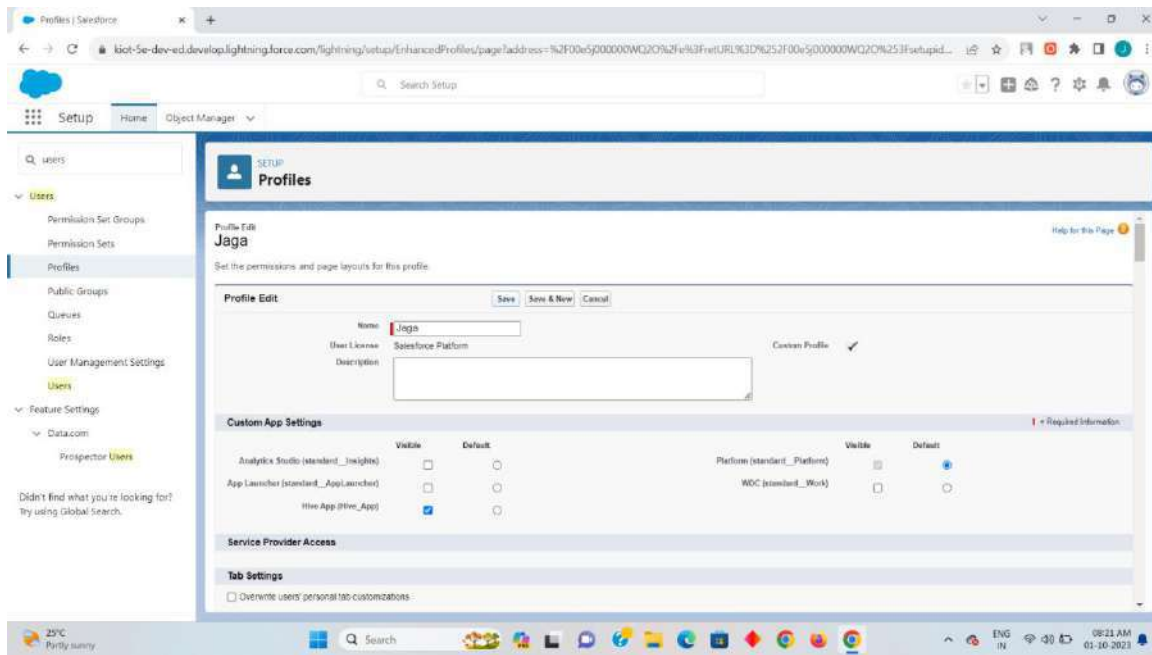
Session Security Level Required at Login:

Enable different Experience Cloud login policies for employees: ☐

Separate Experience Cloud sites and Salesforce login authentication for employees: ☐

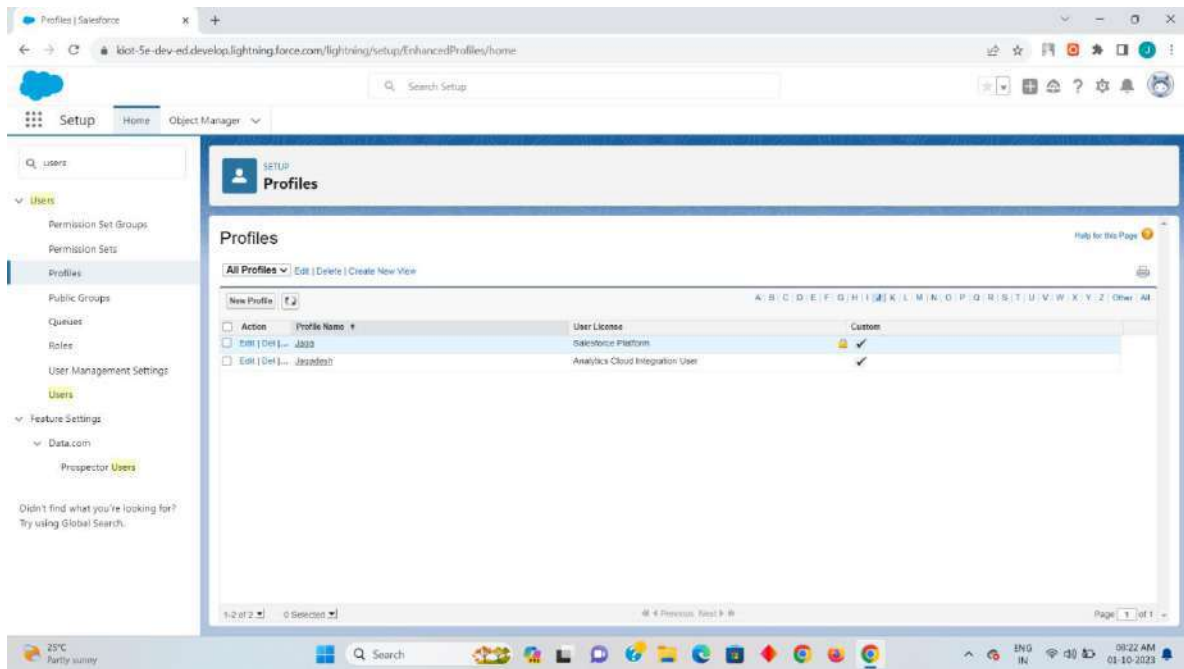
Relax login IP restrictions: ☐

Skip employee device activation during Experience Cloud site login: ☐



Step 4

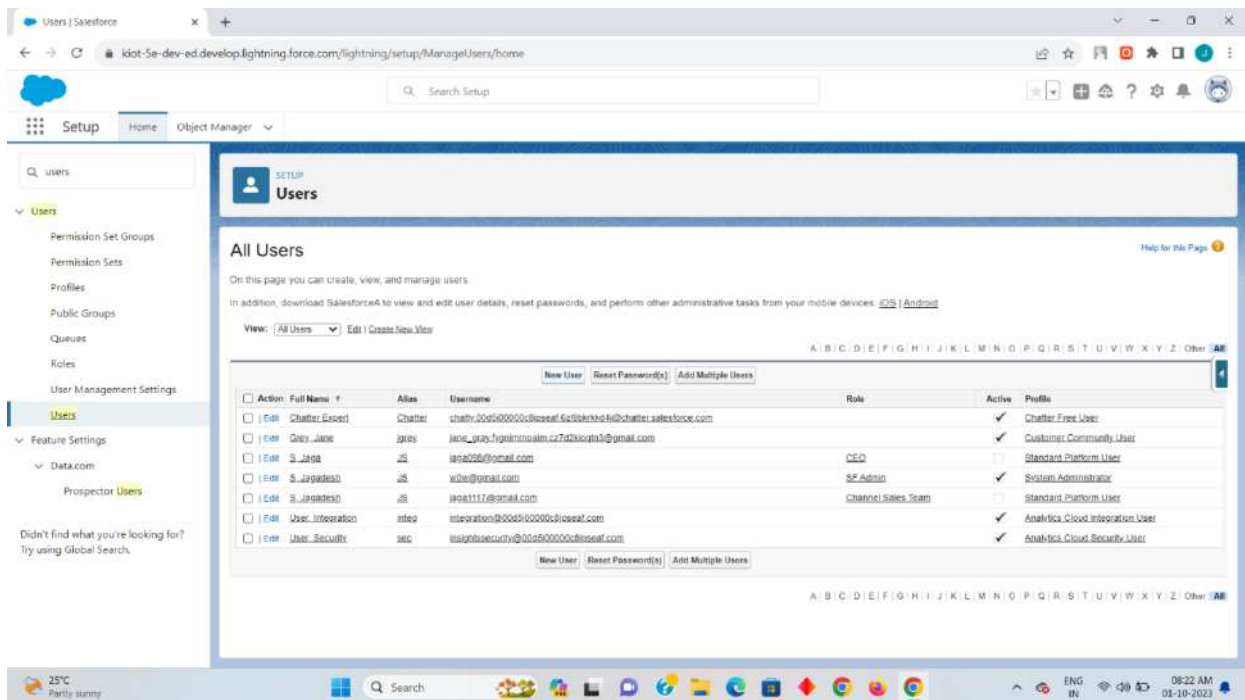
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it



Step 5:

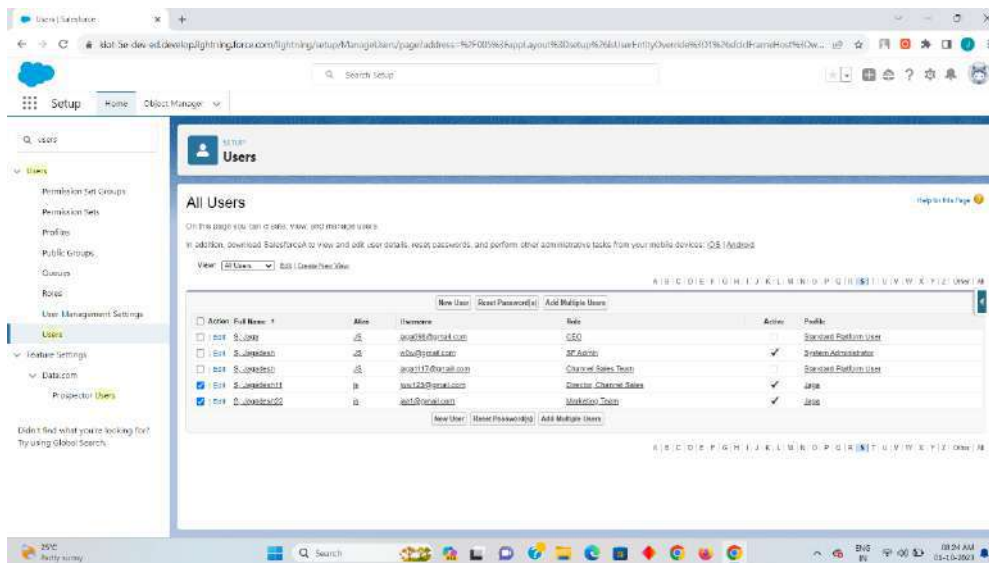
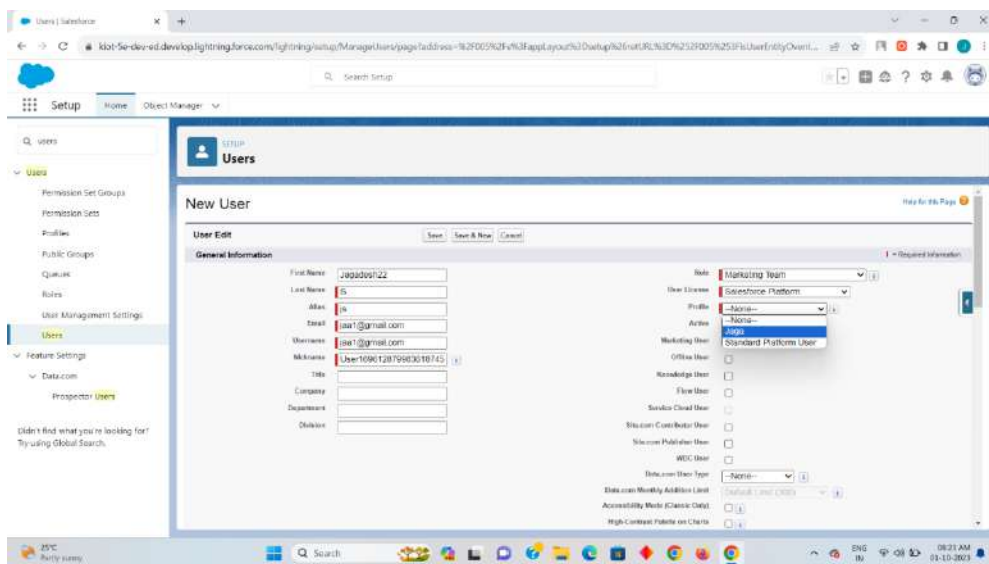
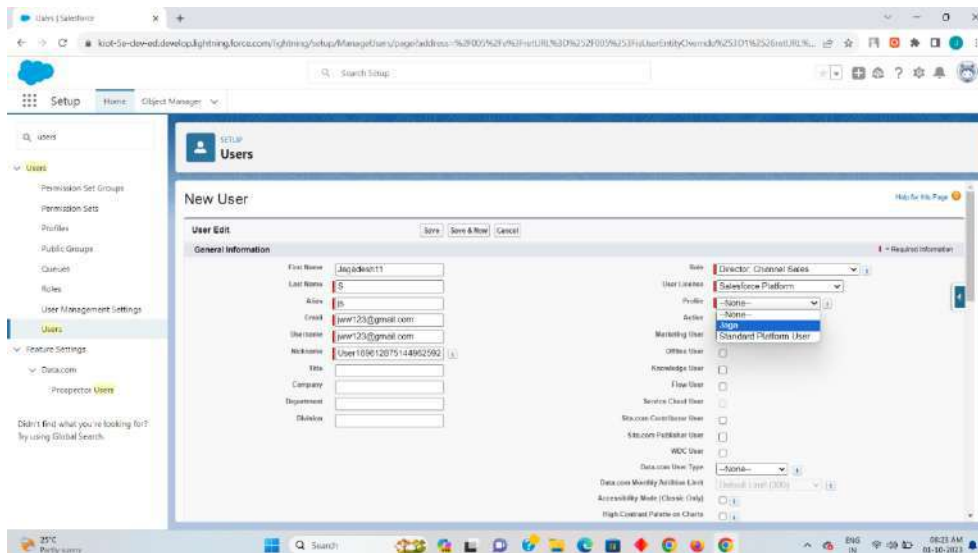
Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along

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



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Users' and 'All Users'. It includes a table of users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table lists several users, including Chatter, Jaga, and various system users. The bottom of the screen shows a Windows taskbar with the date and time.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00540000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Gray Jaga	gray	gray_gray_jagat@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/> Edit	S. Jaga	sj	sjaga005@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S. Jagadeesh	sj	sjaga@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	S. Jagadeesh	sj	sjaga1111@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User Integration	intgr	integration@00050000000000000000000000000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	us@00500000000000000000000000000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User



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

Step 6:

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

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

Permission Sets | Salesforce

kiot-se-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP Permission Sets

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

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

[All Permission Sets] [Edit] [Delete] [Create New View]

	Permission Set Label	Description	Licenses
<input type="checkbox"/>	Admin	Allows access to the system. Lets users use products and categories...	000 Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all buyer capabilities, and allows access to manage carts an...	000 Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Guest User	Indicates that the user is a Guest Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allows 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 Reason Campa...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Salesforce Profile Manager		Salesforce
<input type="checkbox"/>	Facility Manager	Lets apps create, read, edit, and delete locations, applications, equi...	Facility Manager
<input type="checkbox"/>	Field Service Mobile App	Get your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	Merchandise	Allows access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	Order Management (Agent)	Read access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management.	Lightning Order Management User

1-23 of 30 0 Selected

Page 1 of 2

25°C Partly sunny

08:24 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

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

SETUP Permission Sets

Permission Set Create

Save Cancel

Enter permission set information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

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

-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

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

License

Save Cancel

25°C Partly sunny

08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000000Pgt%2F%2FdcFrameOrig%3Dhttps%253A%2F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

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Prospector Users

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

Permission Sets

permission12

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	permission12
License	Namespace Prefix	
Session Authentication Required	Created By	Jagadeesh S. 01/10/2023 8:24 am
Last Modified By		Jagadeesh S. 01/10/2023 8:24 am

Apps

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

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

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

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

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000000Pgt%2F%2FdcFrameOrig%3Dhttps%253A%2F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

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Public Groups

Quotas

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

Permission Sets

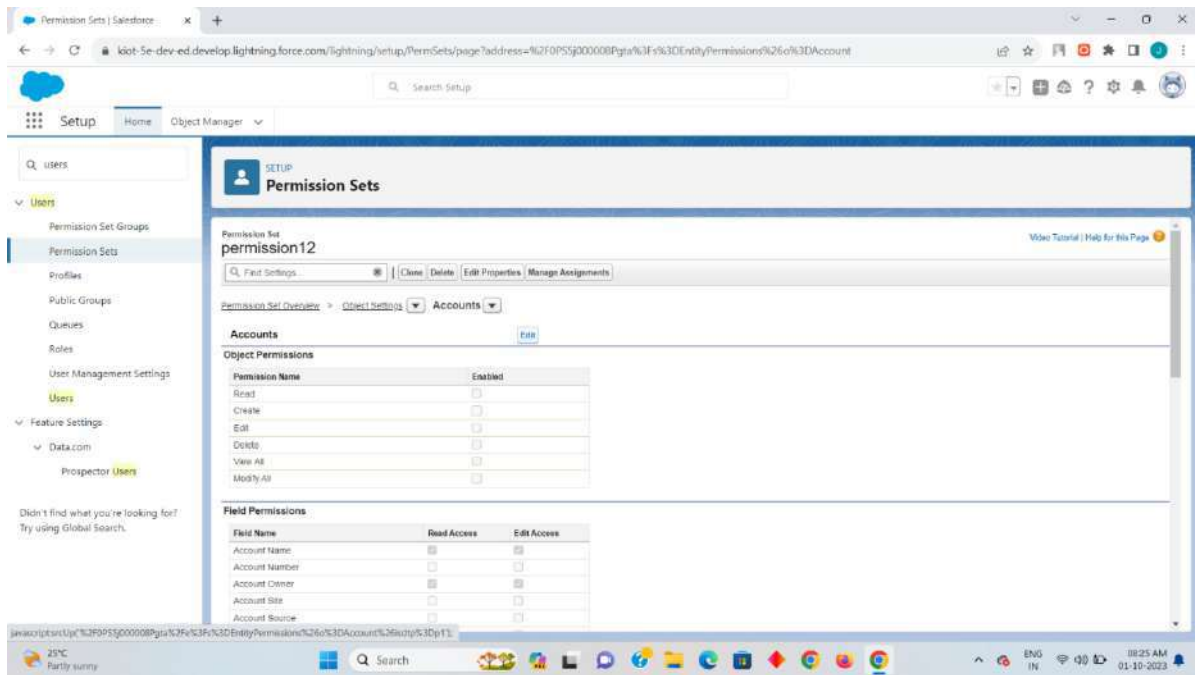
permission12

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings

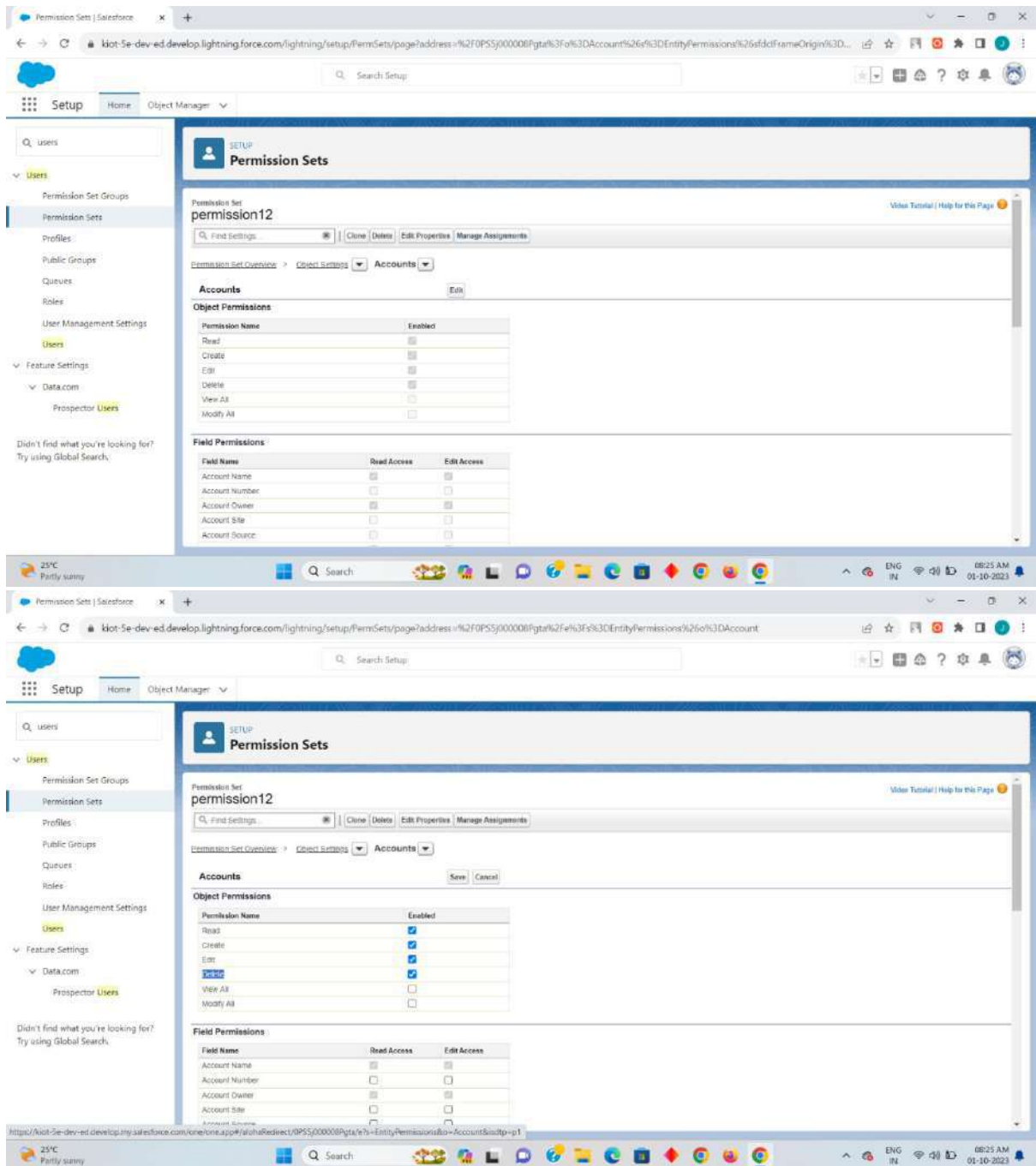
Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	9	---
Account	No Access	44	---
AI Insight Requests	No Access	---	---
AI Insight Insights	No Access	---	---
Alternative Payment Methods	No Access	27	---
API Anonymous Event Stores	No Access	14	---
App Analytics Query Results	No Access	---	---
Application Usage Assignments	No Access	---	---
Appointment Categories	No Access	3	---
Appointment Invitations	No Access	17	---
Appointment Invites	---	4	---
Appointment Schedule Appointments	No Access	---	---
Appointment Schedule Logs	No Access	---	---
Appointment Task Time Slots	No Access	5	---
Asset Actions	No Access	30	---
Asset Action Sources	No Access	18	---



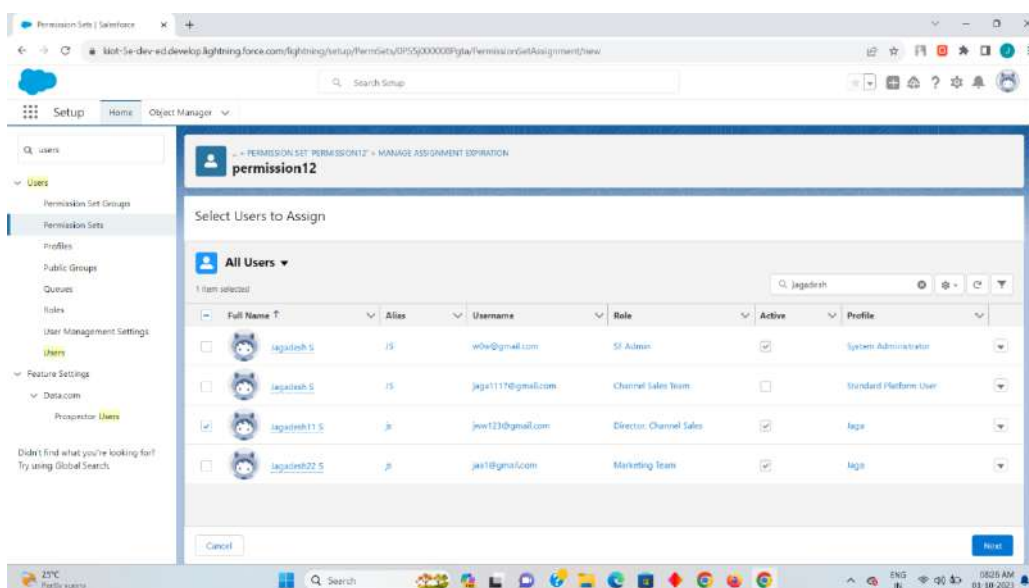
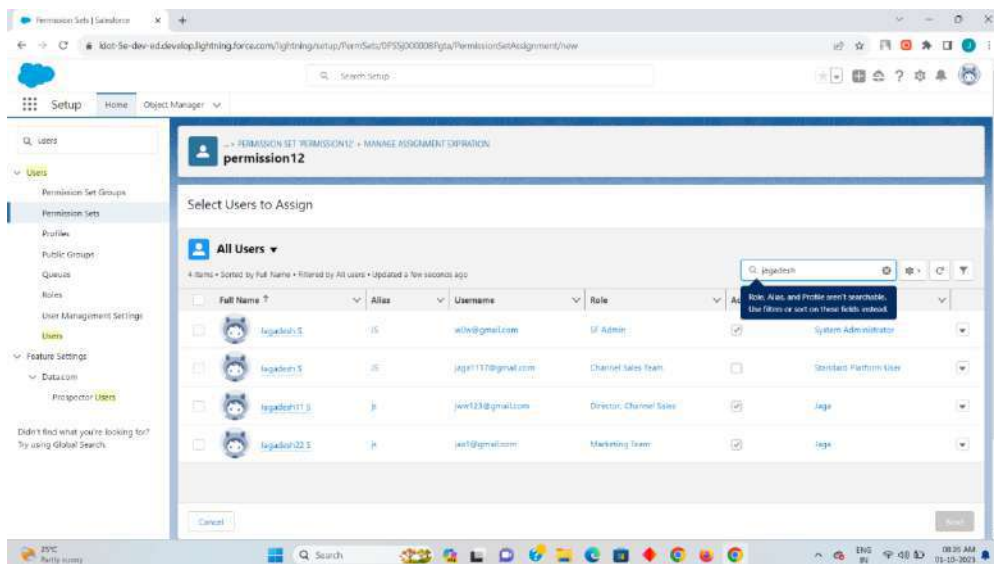
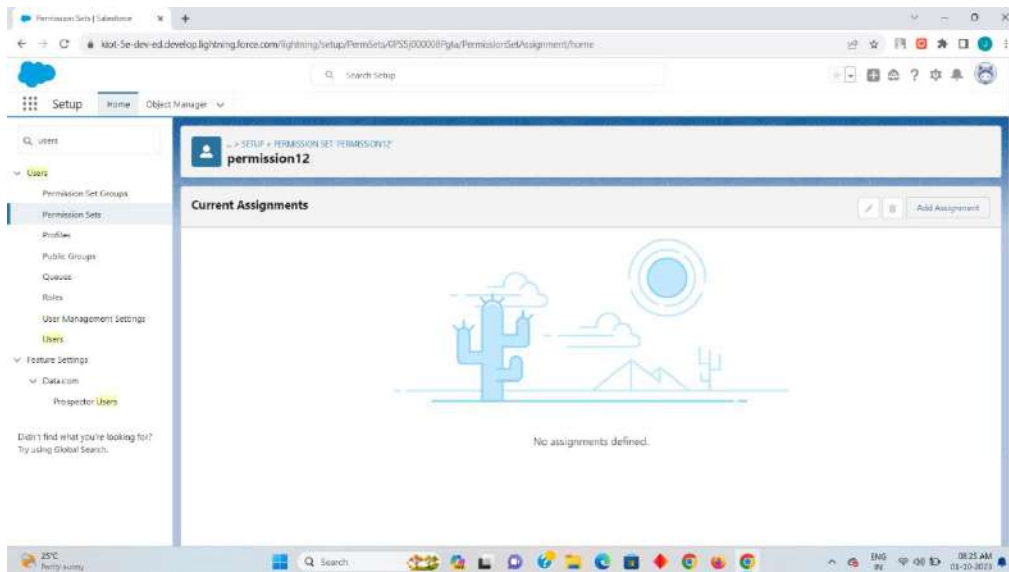
Step 7:

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

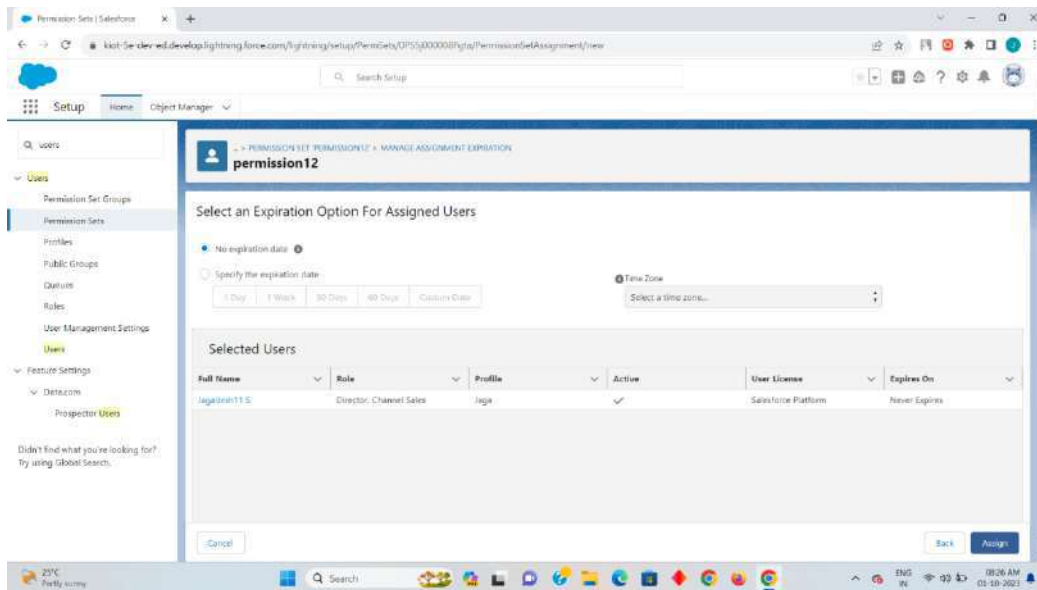


Step 8

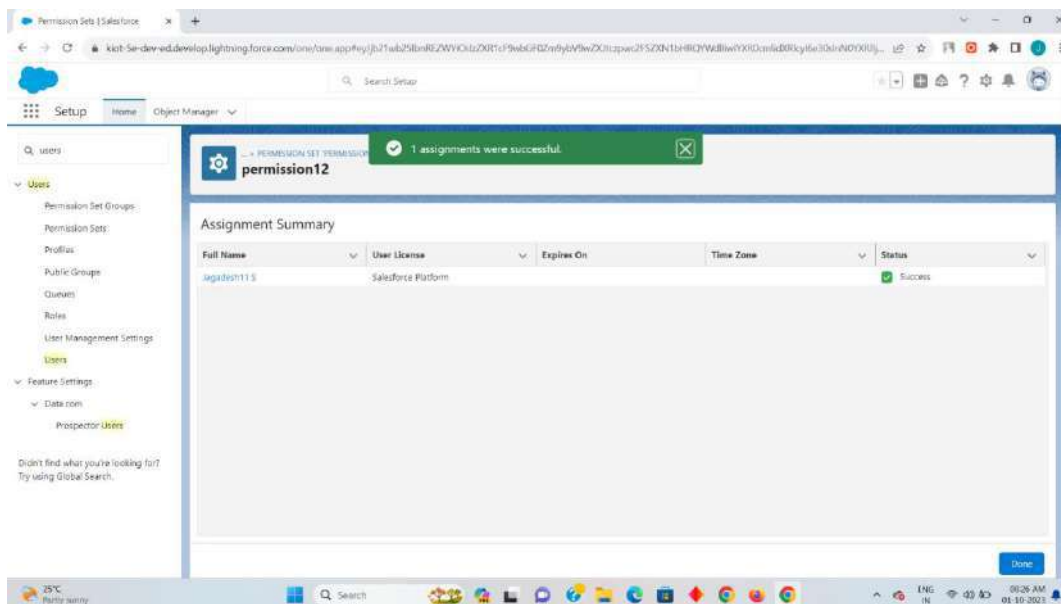
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



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


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

Solution:

Step 1: Create a Custom Object

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

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

<div>  <div> <div>SETUP > OBJECT MANAGER</div> <div>Survey Result</div> </div> </div>					
<div> <div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>Search Layouts for Salesforce Classic</div> <div>Triggers</div> <div>Validation Rules</div> </div>	<div> <div>Fields & Relationships</div> <div>8 Items, Sorted by Name</div> <div>Quick Find</div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div>				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	Comment	Comment__c	Text Area(255)		
	Created By	CreatedById	Lookup(User)		
	Email	Email__c	Email		
	Last Modified By	LastModifiedById	Lookup(User)		
	Name	Name__c	Text(51)		
	Owner	OwnerId	Lookup(User,Group)		✓
	Rating	Rating__c	Picklist		
	Survey Result Name	Name	Auto Number		✓

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

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

Email Template
Thank You Email - Survey

[Edit in Builder](#)
[Edit](#)
[Clone](#)

Details
Related

Information

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

Message Content

Subject	Thank You For Completing Our Survey!	Enhanced Letterhead	
HTML Value	<div> <div></div> <div> 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 </div> <div></div> </div>		

Additional Information

Created By	Rakesh Gupta, 12/21/2020, 4:23 PM	Last Modified By	Rakesh Gupta, 12/21/2020, 4:32 PM
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Step 3: Create an Email Alert

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

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

The screenshot shows the 'Edit Email Alert' interface for 'Survey - Thank You Email'. The page includes a header with 'Edit Email Alert' and 'Survey - Thank You Email', and a 'Help for this Page' link. Below the header is a description: '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.' The main form is titled 'Email Alert Edit' and contains several sections: 'Edit Email Alert' with fields for Description, Unique Name, Object, Email Template, Protected Component, and Recipient Type; 'Recipients' section with 'Available Recipients' and 'Selected Recipients' lists; 'Additional Emails' section with a text area; and 'From Email Address' section with a dropdown and a checkbox. The 'Recipients' section shows 'Available Recipients' as 'User: Integration User', 'User: Rakesh Gupta', and 'User: Security User', and 'Selected Recipients' as 'Email Field: Email'. The 'From Email Address' section shows 'Current User's email address' and a checkbox to 'Make this address the default From email address for this object's email alerts.' The form has 'Save', 'Save & New', and 'Cancel' buttons at the bottom.

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

1. Click **Setup**.

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

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

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

2.Value: {!Comment}

2.Click Add Row

3.Row 2:

1.Field: Email__c

2.Value: {!Email.value}

4.Click Add Row

5.Row 3:

1.Field: Name__c

**2.Value: {!Name.firstName}
 {!Name.lastName}**

6.Click Add Row

7.Row 3:

1.Field: Rating__c

2.Value: {!Rating}

7.Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

* Label
Save Response

* API Name
Save_Response

Description

How Many Records to Create

☒ One
☐ Multiple

How to Set the Record Fields

☐ Use all values from a record
☒ Use separate resources, and literal values

Create a Record of This Object

* Object
Survey Result

Set Field Values for the Survey Result

Field
Comment__c

←
Value
Comment

Field
Email__c

←
Value
Email > Value

Field
Name__c

←
Value
(!Name.firstName) (!Name.lastName)

Field
Rating__c

←
Value
Rating

+ Add Field

☐ Manually assign variables

Cancel Done

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

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

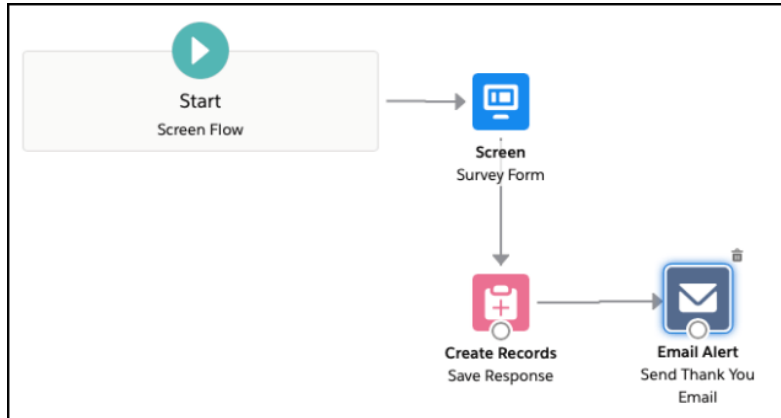
1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.

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

5. Click **Done**.

The screenshot shows the configuration interface for an email alert. At the top, it says 'Edit "Survey - Thank You Email" email alert'. Below this is a note: 'Use values from earlier in the flow to set the inputs for the "Survey - Thank You Email" email alert. To use its outputs later in the flow, store them in variables.' There are two input fields: '* Label' with the value 'Send Thank You Email' and '* API Name' with the value 'Send_Thank_You_Email'. Below these is a 'Description' field. Further down is a 'Set Input Values' section with a field for 'Record ID' containing the value '(!Save_Response)'. At the bottom right are 'Cancel' and 'Done' buttons.

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



1. Click **Save**.

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

3. Click **Show Advanced**.

4. **How to Run the Flow: User or System Context—Depends on How Flow is Launched**
5. **Type: Screen Flow**
6. **API Version for Running the Flow: 51**
7. **Interview Label: Survey
{!\$Flow.CurrentDateTime}**
8. **Click Save.**

Save as

A New Version

A New Flow

* Flow Label

Survey

* Flow API Name

Survey

Description

Hide Advanced

How to Run the Flow ⓘ

User or System Context—Depends on How Flow is Launched

* Type

Screen Flow

* API Version for Running the Flow

51

Interview Label ⓘ

Insert a resource...

Survey {!\$Flow.CurrentDateTime}

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

2

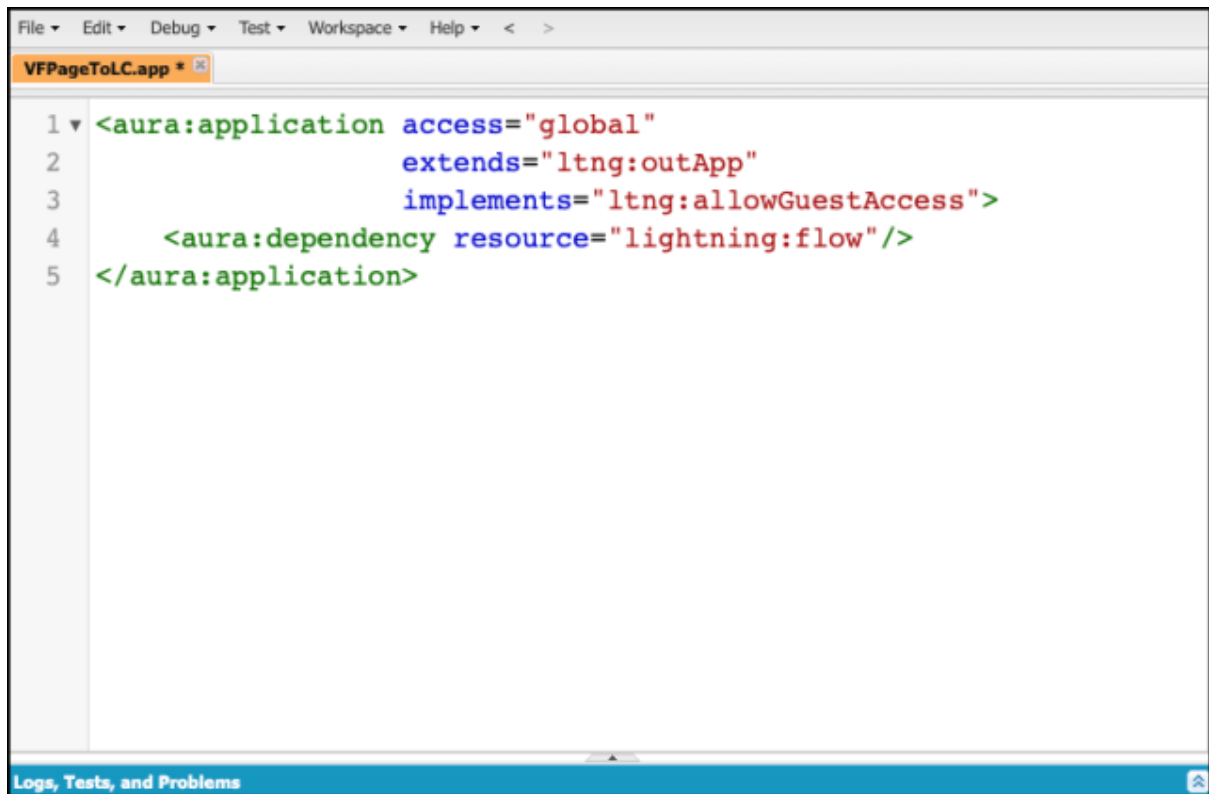
Cancel

Save

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

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

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



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

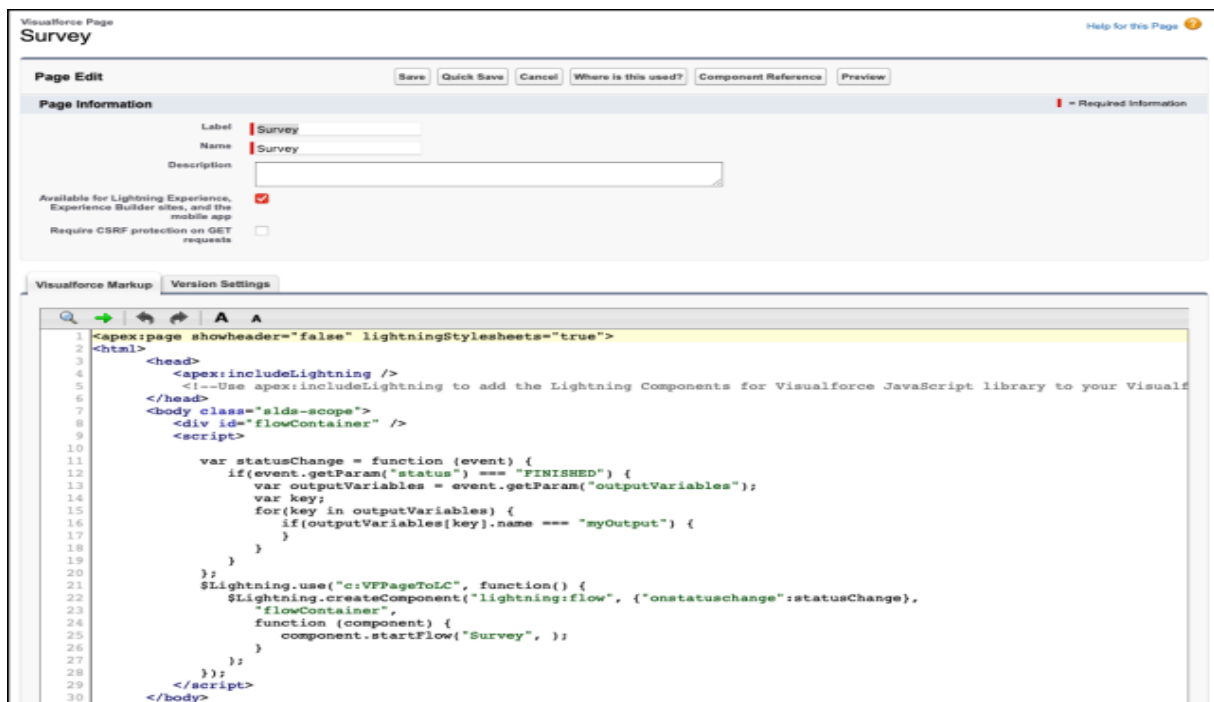
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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**.



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 [i]

Site Name: Survey [i]

Site Description: [Text Area]

Site Contact: Rakesh Gupta [i]

Default Record Owner: Rakesh Gupta [i]

Default Web Address: http://katihar-developer-edition.gus.force.com/ survey [i]

Active: ☒ [i]

Active Site Home Page: Survey [Preview] [i]

Inactive Site Home Page: InMaintenance [Preview] [i]

Site Template: SiteTemplate [i]

Site Robots.txt: [Text Field] [i]

Site Favorite Icon: [Text Field] [i]

Analytics Tracking Code: [Text Field] [i]

URL Rewriter Class: [Text Field] [i]

Enable Feeds: ☐

Clickjack Protection Level: Allow framing by the same origin only (Recommended) [i]

Require Secure Connections (HTTPS): ☒ [i]

Lightning Features for Guest Users: ☒ [i]

Upgrade all requests to HTTPS: ☒ [i]

Enable Content Sniffing Protection: ☒ [i]

Enable Browser Cross Site Scripting Protection: ☒ [i]

Referrer URL Protection: ☒ [i]

Guest Access to the Payments API: ☐ [i]

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

Sinhal


*Email

*Rating

5 

*Comment

Awesome Blog



Next

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

A screenshot of an email interface. The header shows the subject "Thank You For Completing Our Survey!" and a status "Inbox". The sender is "Survey Site Guest User" with a profile picture and a link to a Salesforce profile. The recipient is "to me". The email body contains a thank-you message from "Alok Sinhal" on behalf of the "Automation Champion". The message expresses appreciation for the recipient's participation in a survey and mentions that the results will be shared through the State Survey Agency. At the bottom, there are "Reply" and "Forward" buttons.