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Salesforce
Developer(Course)
Assignment n 1

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Year & Dep : 4th year & CSE
Batch : 2024
Zone n : Zone 8

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

Solution:

Step 1: Create Custom Objects

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

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Profile

SETUP

New Custom Object

New Custom Object

Help for this Page

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

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

Required Information

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

Label

college

Example: Account

Plural Label

colleges

Example: Accounts

Starts with vowel sound

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

Object Name

college

Example: Account

Description

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Content Name

Help

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 text is always called "Name" when referenced via the API.

Record Name

college Name

Example: Account Name

Data Type

Text

Optional Features

Allow Reports

Allow Activities

Track Field History

Allow in Chatter Groups

Enable Licensing

Object Classification

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

Allow Sharing

Allow Bulk API Access

Allow Streaming API Access

Deployment Status

What is this?

In Development

Deployed

Search Status

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

Allow Search

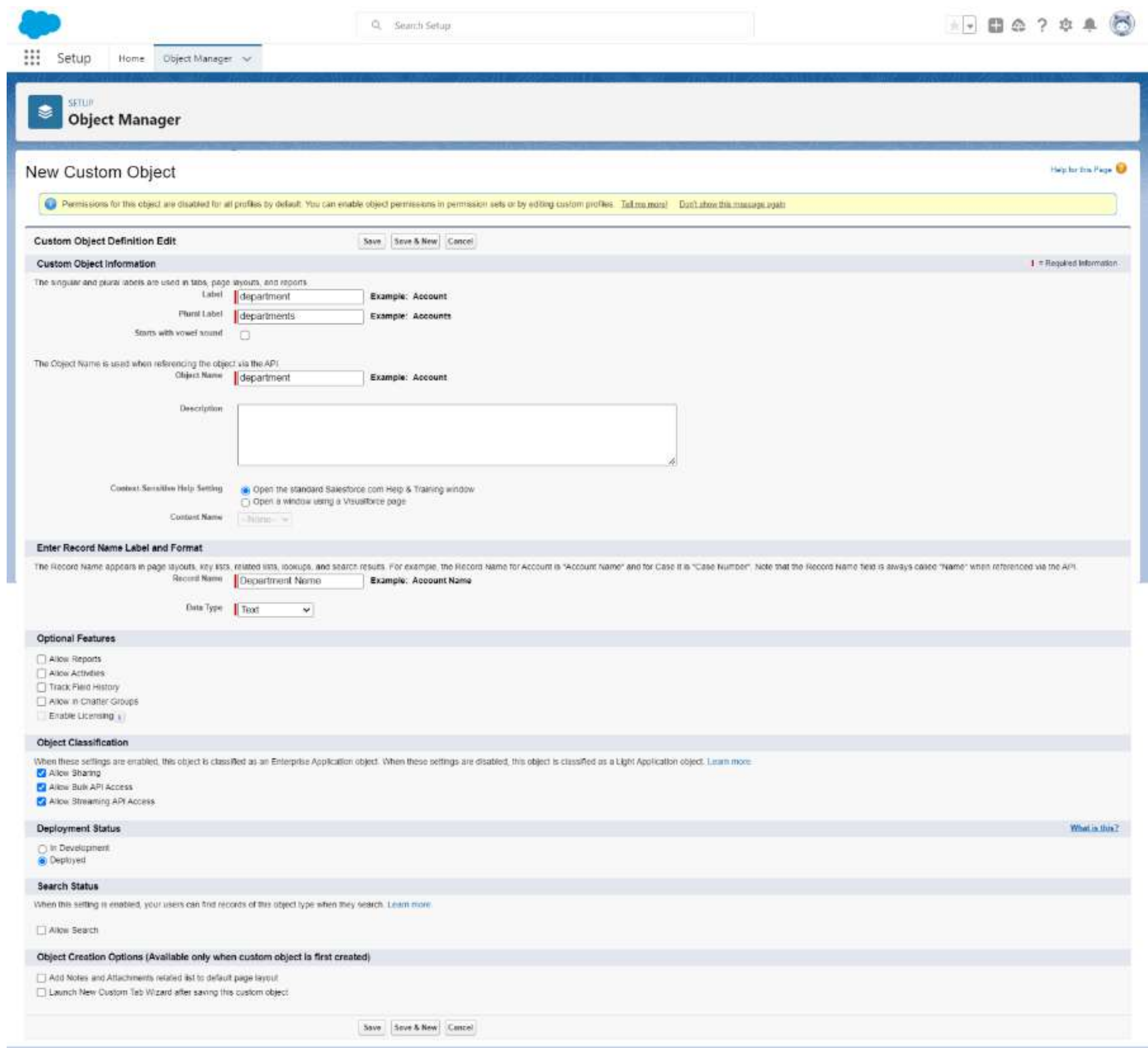
Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout

Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

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




The screenshot shows the Salesforce Setup interface, specifically the Object Manager section. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header is 'Object Manager'. 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. [Tell me more!](#) [Don't show this message again](#)'. Below this is the 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section includes fields for 'Label' (department), 'Plural Label' (departments), 'Starts with vowel sound' (unchecked), 'Object Name' (department), and 'Description'. It also has a 'Context-Sensitive Help Setting' section with two options: 'Open the standard Salesforce.com Help & Training window' (checked) and 'Open a window using a Visualforce page' (unchecked). The 'Enter Record Name Label and Format' section includes 'Record Name' (Department Name) and 'Data Type' (Text). The 'Optional Features' section has checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Object Classification' section has checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section has radio buttons for 'In Development' and 'Deployed'. The 'Search Status' section has a checkbox for 'Allow Search'. The 'Object Creation Options' section has checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Step 2: Create a Master-Detail Relationship

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

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

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



Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

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

EditDelete



Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

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

Step 3 of 6

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

Field Labelcollege

Field Namecollege

Description

Help Text

Child Relationship NameCDepartments

Sharing Setting

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

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

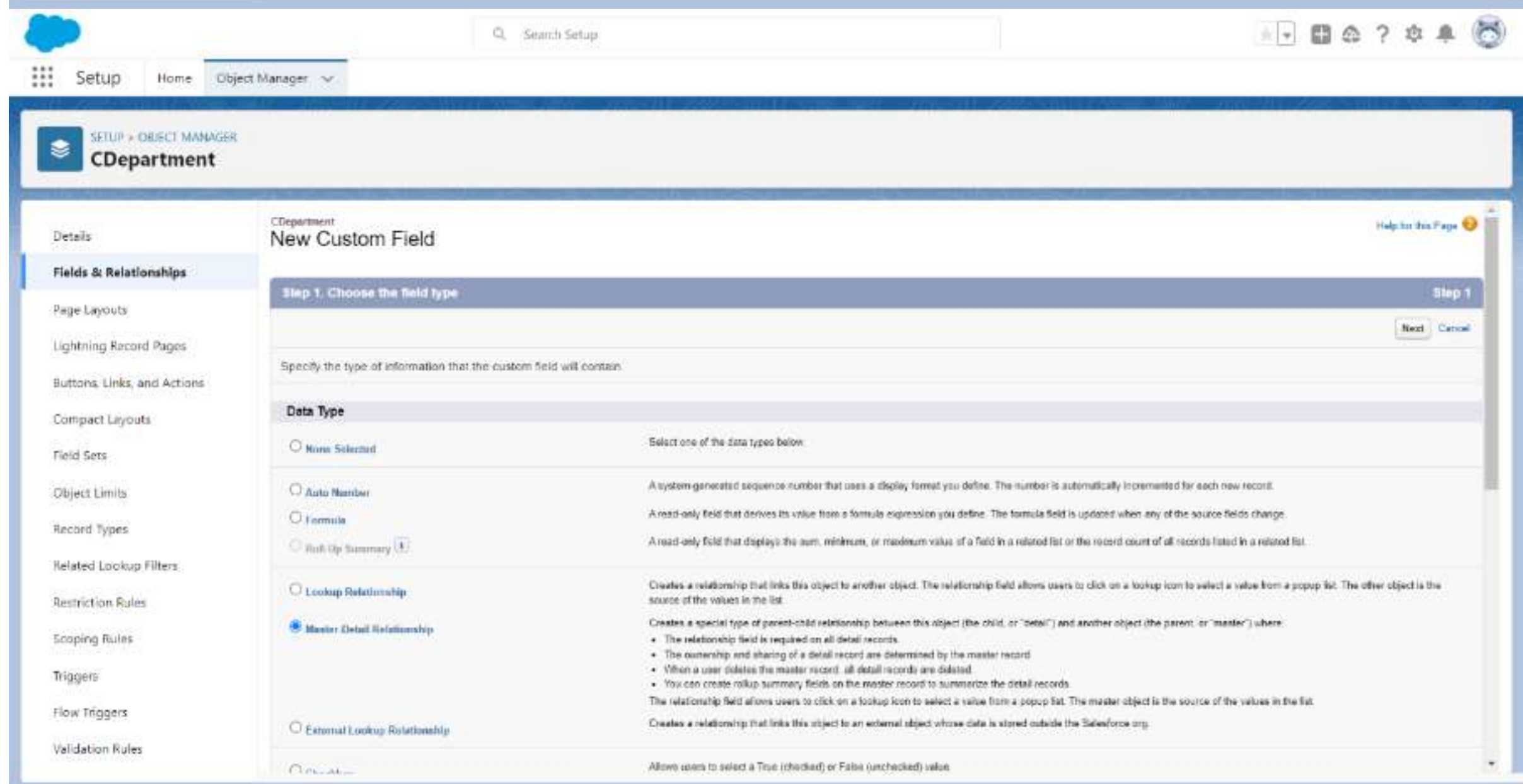
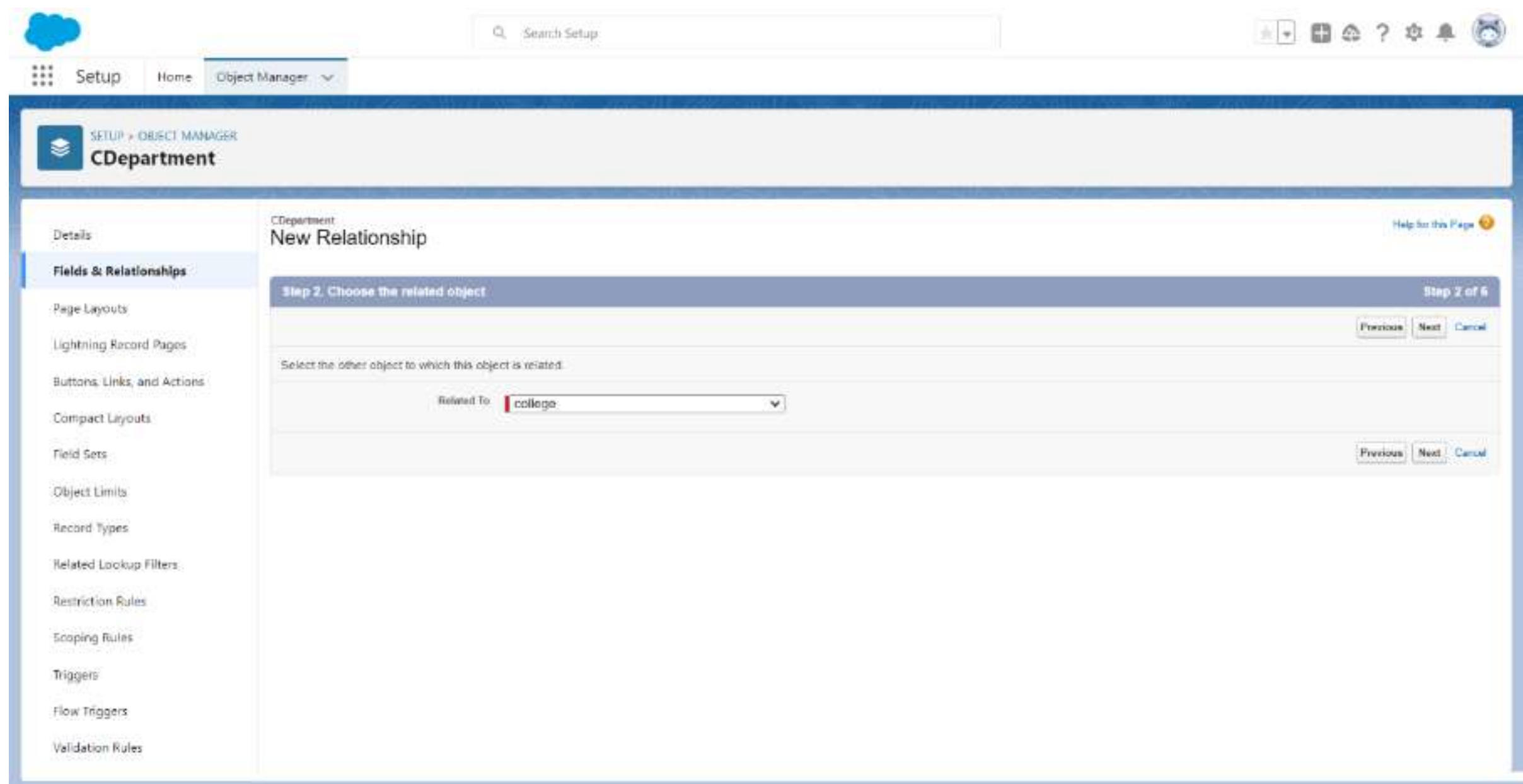
Allow reparenting

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

Auto-add to custom report type

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

Lookup Filter

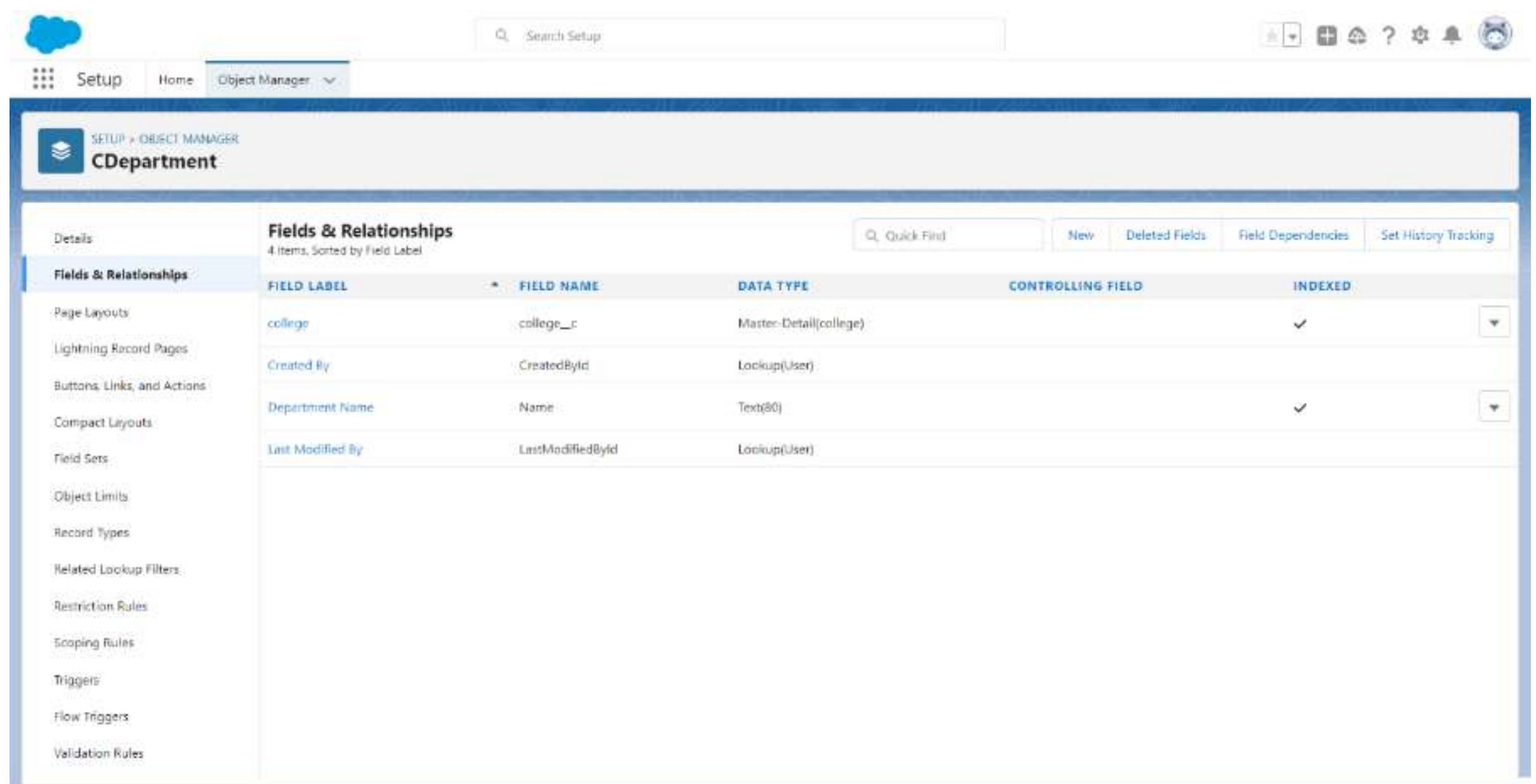


Step 3: Create the Roll-Up Summary Field

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

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

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



Setup

Home

Object Manager

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

Book

Don

Edit | Del

Research Proposal

Square

Edit | Del

student

Don

Web Tabs

New

What is This?

No Web Tabs have been defined.

Visualforce Tabs

New

What is This?

No Visualforce Tabs have been defined.

Lightning Component Tabs

New

What is This?

No Lightning component tabs have been defined.

Lightning Page Tabs

New

What is This?

No Lightning Page Tabs have been defined.

Setup

Home

Object Manager

Search

colle

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

Help for this Page

Step 5. Add to page layouts

Step 5 of 5

Field Label

Total count

Data Type

Roll-Up Summary

Field Name

Total_count

Description

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

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

☒ Add Field

Page Layout Name

☒ college Layout

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

Previous

Save & New

Save

Cancel

cloud

cole

SetupHomeObject Manager

college

college

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesTriggersFlow TriggersValidation Rules

college

New Custom Field

Help for this Page

Step 4. Establish field-level security

Step 4 of 5

PreviousNextCancel

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

cloud

cole

SetupHomeObject Manager

college

college

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesTriggersFlow TriggersValidation Rules

college

New Custom Field

Help for this Page

Step 3. Define the summary calculation

Step 3 of 5

PreviousNextCancel

Select Object to Summarize

Member Objectcollege

Summarized ObjectCDepartments

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

PreviousNextCancel

SetupHomeObject Manager

college

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesTriggersFlow TriggersValidation Rules

college
New Custom Field

Help for this Page

Step 2. Enter the detailsStep 2 of 5

Field LabelTotal countField NameTotal_countDescriptionHelp Text

Auto add to custom report typeAdd this field to existing custom report types that contain this entry

PreviousNextCancel

SetupHomeObject Manager

college

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesTriggersFlow TriggersValidation Rules

college
New Custom Field

Help for this Page

Step 1. Choose the field typeStep 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.

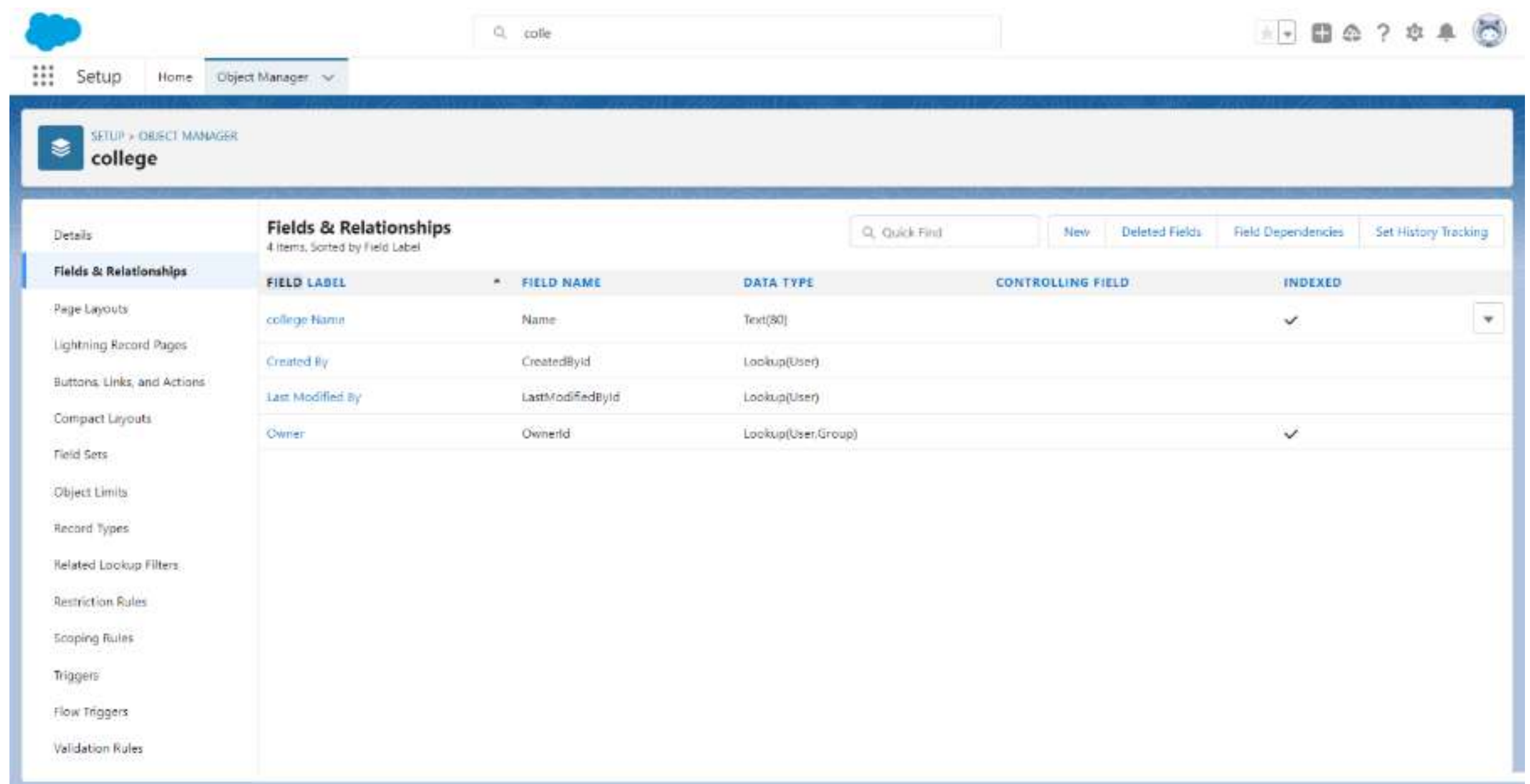
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ External Lookup Relationship

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

☐ Boolean

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



Step 4: Create a Lightning App

1. Type and select "App Manager."
2. Click "New Lightning App."
3. Fill in basic information (Name, Developer Name, Description).
4. Choose the App Type (Standard, Console, Custom).
5. Customize the Logo and Colour Scheme.
6. Configure Navigation Items (objects to appear in the app's menu).
7. Set the App Visibility (default access).

8. Optionally, choose Record Pages (Lightning Record Pages).

9. Review and Save the app.

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

Setup Tabs

New Custom Object Tab

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

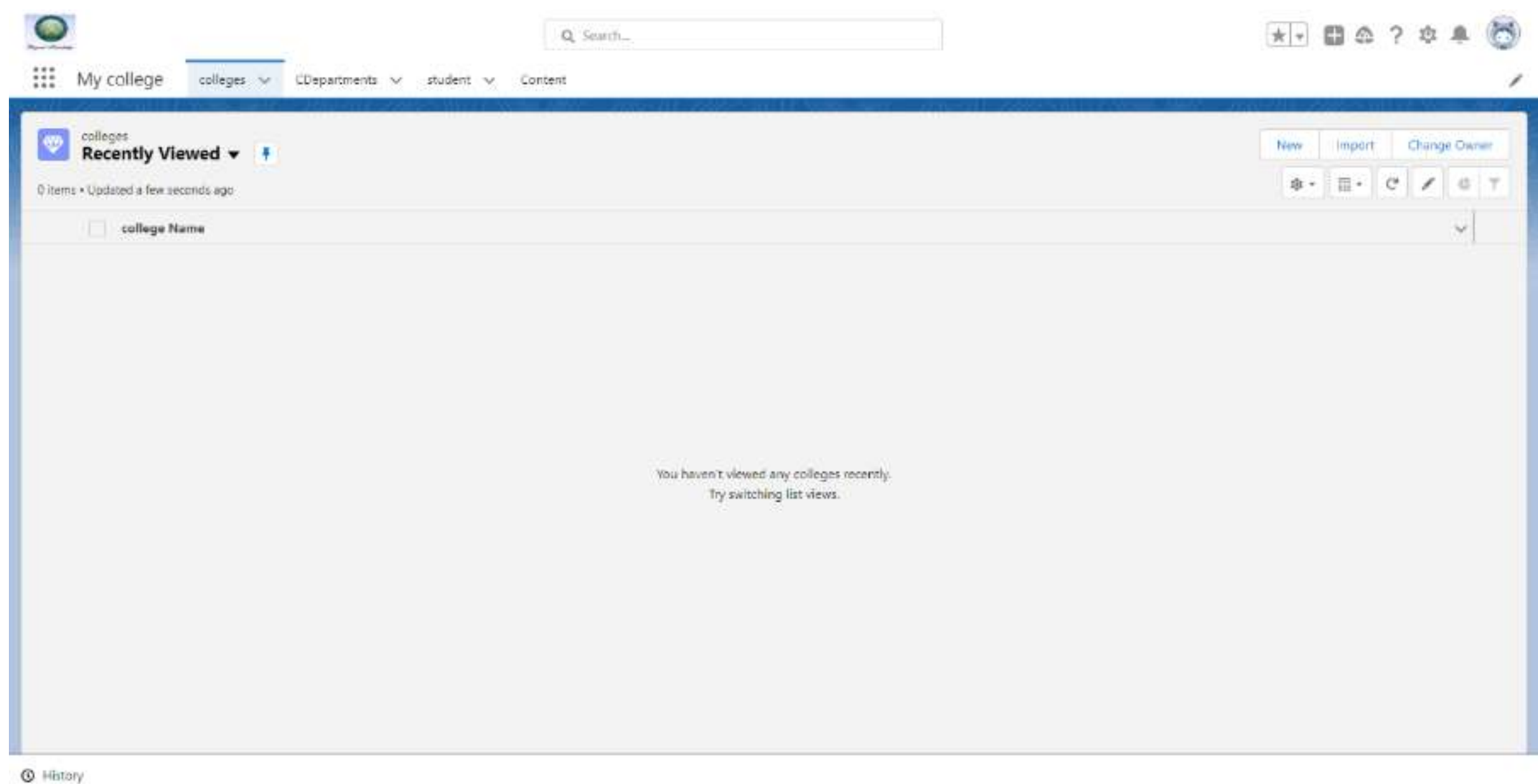
Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Cloud Kicks Admin	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom Marketing Profile	Default 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

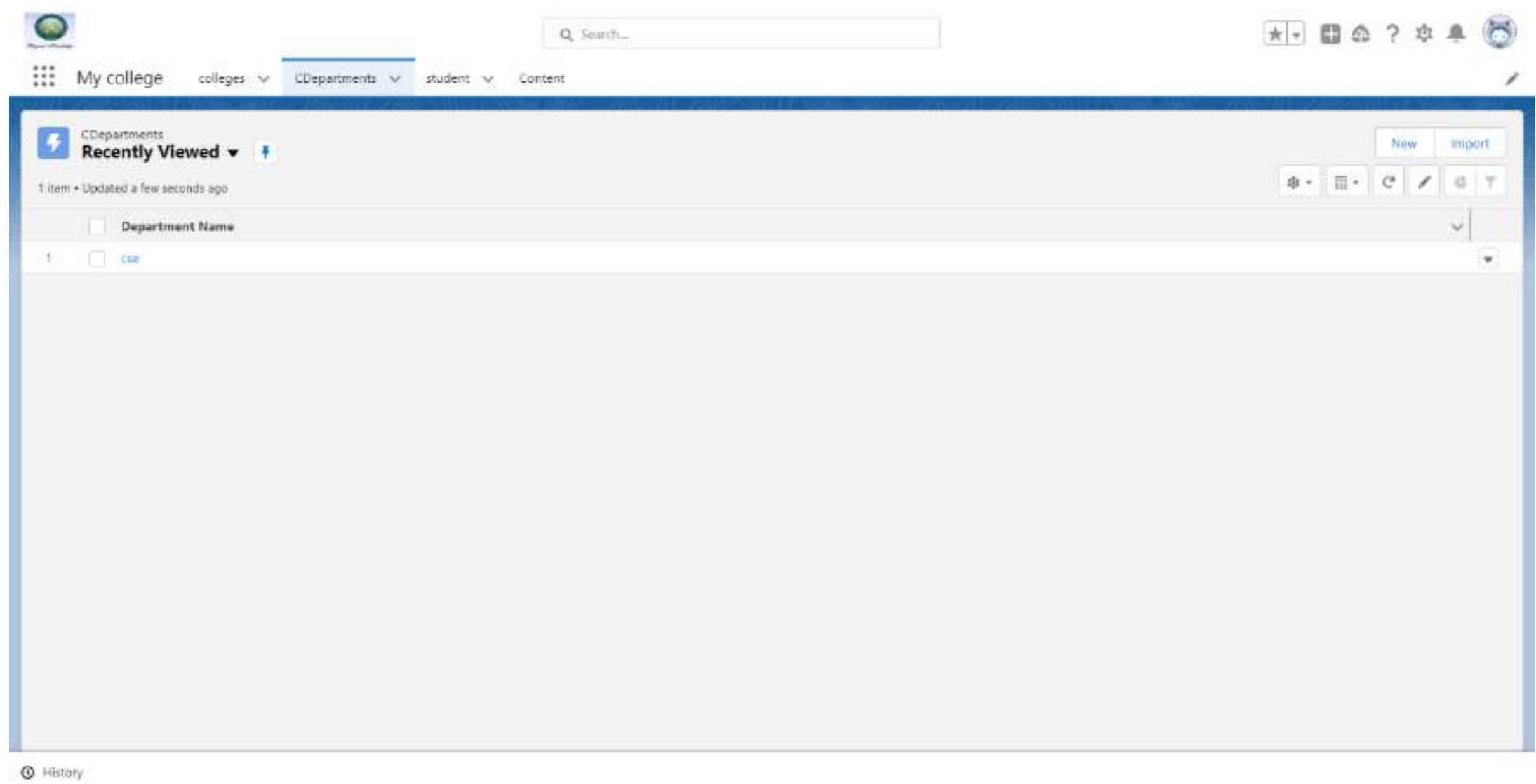
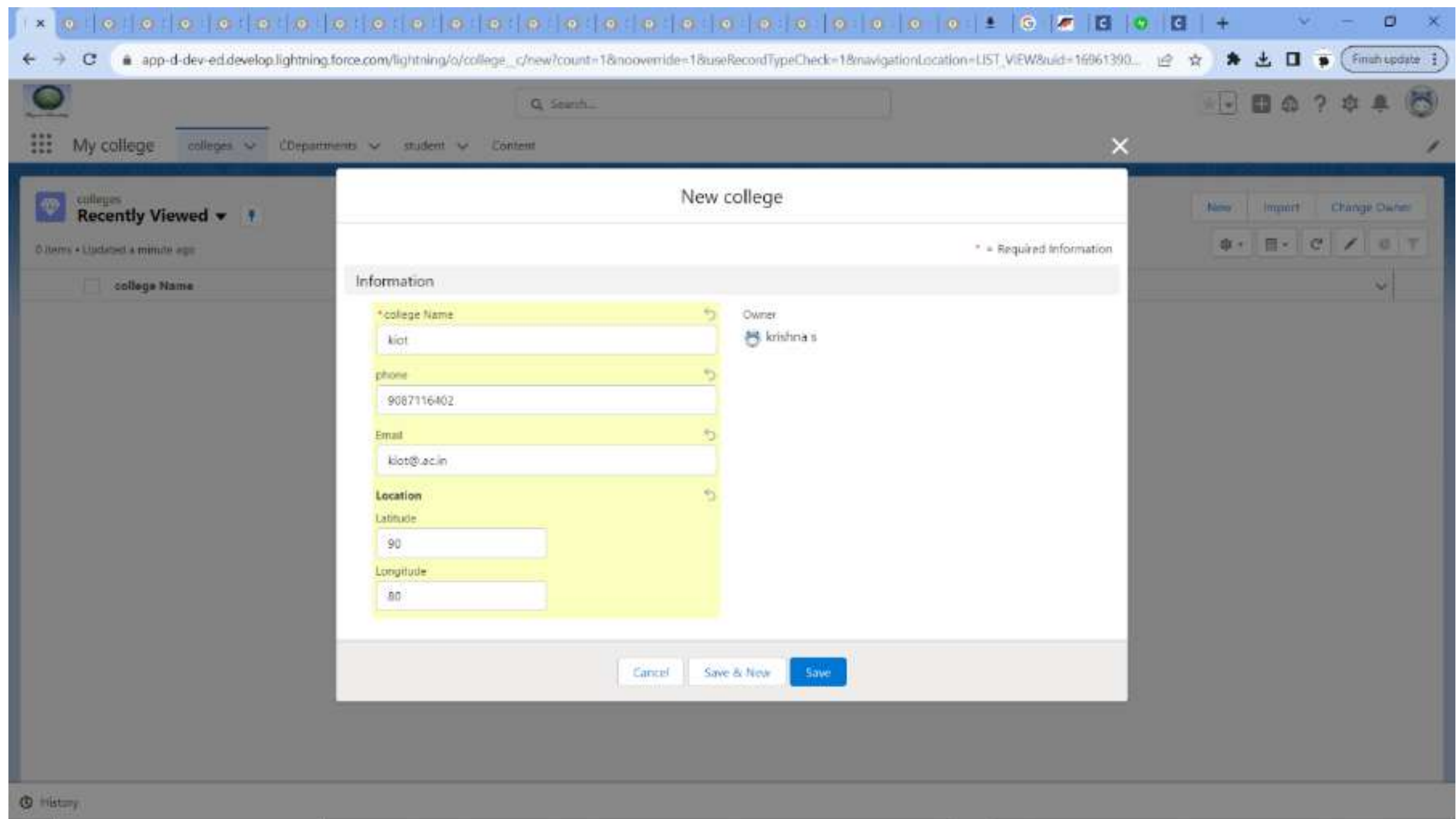
Previous Next Cancel

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.





app-d-dev-ed.develop.lightning.force.com/lightning/o/CDepartment_/new?count=3&nooveride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169...

My college

colleges

CDepartment

New CDepartment

To unpin, pin another list view

CDepartments

Recently Viewed

1 item • Updated a minute ago

Department Name

1

Information

* Required Information

*Department Name

information technology

*college

kiot

email

it@gmail.com

phone

887577568

hod name

anil


about

Cancel

Save & New

Save

History

 CDepartment

Information technology

New Contact

Edit

New Opportunity

Related

Details

Department Name

information technology

college

kiot

email

it@gmail.com

phone


897577560

hod name


arul


about

Created By

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

Last Modified By

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

 college

kiot

New Contact

Edit

New Opportunity

Related

Details

college Name

kiot

Total count

1

phone

9087116402


Email

kiot@gmail.com


Location

90, 80


Created By


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

Last Modified By

 krishna s. 01/10/2023, 11:17 am

Owner

 krishna s

 CDepartments

Recently Viewed

New

Import

1 item • Updated a few seconds ago

⚙️

🔍

🔄

✎

🗑️

📄

☐ Department Name

1

☐ CDE



Search...



My college colleges Departments student Content

colleges

Recently Viewed

New Import Change Owner

1 item • Updated a few seconds ago

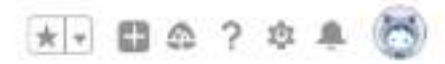
college Name

1 kiot

History



Search...



My college colleges Departments student Content

college
kiot

New Contact Edit New Opportunity

Related Details

college Name

kiot

Owner

krishna s

Total count

2

phone

9087116402

Email

kiot@gmail.com

Location

90, 80

Created By

krishna s, 01/10/2023, 11:16 am

Last Modified By

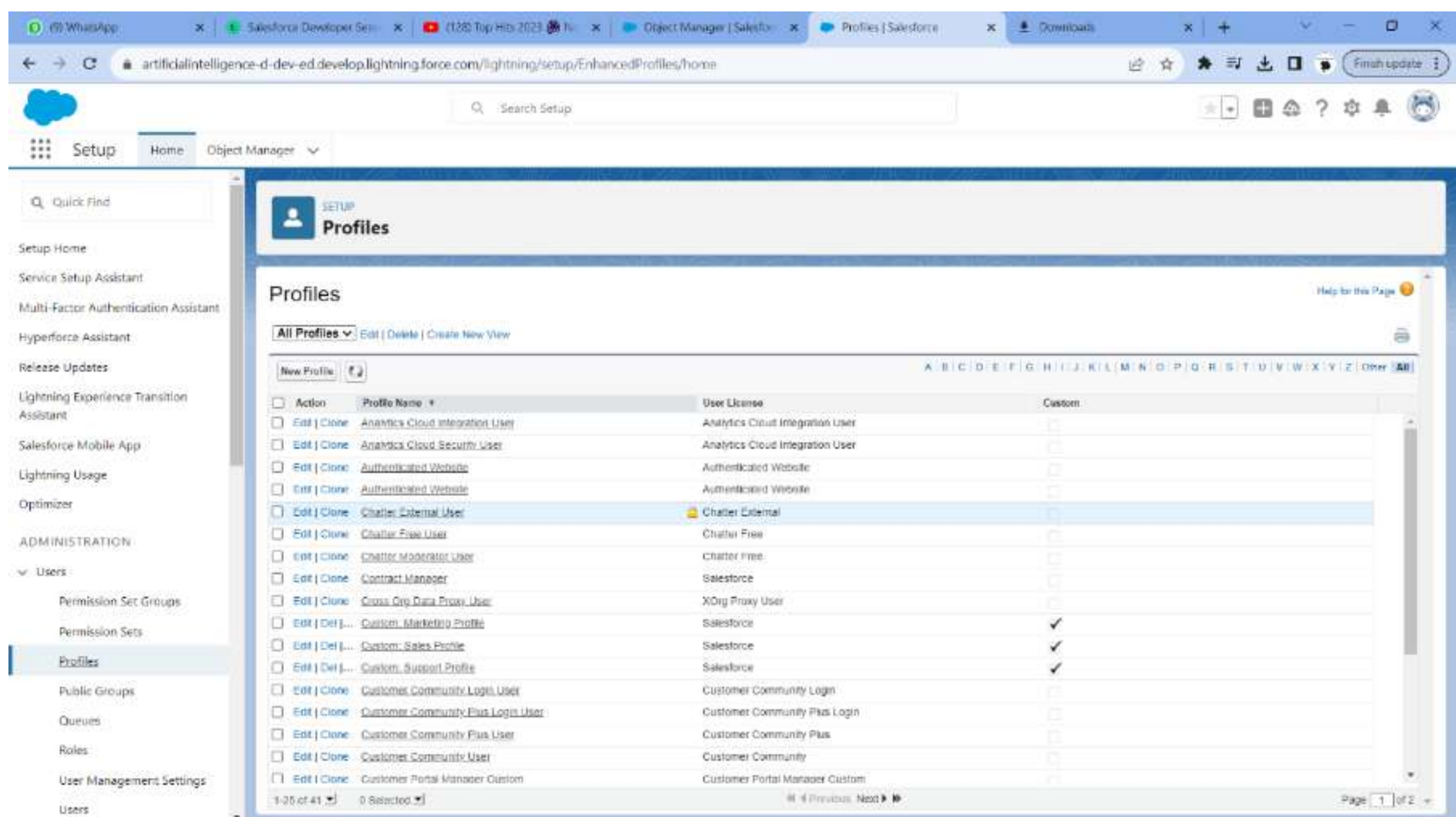
krishna s, 01/10/2023, 11:19 am

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

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Profiles

All Profiles

New Profile

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

1-7 of 70 Selected: 0

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Roles

User Management Settings

Users

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	

Save Cancel

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_u%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%...

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ADMINISTRATION

Users

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Roles

User Management Settings

Users

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000W0Bz%3Fsetupid%3DEnhancedProfiles

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User Management Settings

Users

Profile: Manager

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

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

[Link to P Review \(0\)](#) | [Enabled Basic Case Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definition Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail

Name	Manager
User License	Salesforce Platform
Description	
Created By	QCPAL_S, 01/10/2023, 7:09 pm
Modified By	QCPAL_S, 01/10/2023, 7:09 pm

Edit Clone Delete View Users

Page Layouts

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000W0Bz62Fe963FrefURL%3D%252F00e5j0...

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

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ADMINISTRATION

Users

Permission Set Groups

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Public Groups

Queues

Roles

User Management Settings

Users

Profiles

Manager

Set the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name: Manager

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings Required Information

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

Service Provider Access

Tab Settings

☐ Override users' personal tab customizations

Standard Tab Settings

Home	Default On	Learning	Default On
Accounts	<input checked="" type="checkbox"/>	Libraries	<input checked="" type="checkbox"/>
Alert Settings	<input checked="" type="checkbox"/>	Lightroom Bolt Solutions	<input checked="" type="checkbox"/>

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000W0Bz62Fe963FrefURL%3D%252F00e5j0...

Setup Home

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User Management Settings

Users

Profiles

Communication Subscription Channel Types

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

Custom Object Permissions

	Basic Access				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"/>		<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"/>		<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

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Users

Permission Set Groups

Permission Sets

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Public Groups

Queues

Roles

User Management Settings

Users

Profiles

Basic

Advanced

Full

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"/>

Full

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

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User Management Settings

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Basic

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Full

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"/>

Full

Setups	<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			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"/>		<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"/>		<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"/>

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Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000A4LxG%3FnoRedirect%3D1%26isUserEntityO...

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Users

User Profile Help for this Page

User: sowmiya bala

Permission Set Assignments (0) | Permission Set Assignments, Activated Row(s) (0) | Permission Set Groups Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Groups Membership (0) | Quota 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-Provided Accounts (0)

User Detail

Edit | Sharing | Reset Password | Login | Freeze

Name	sowmiya bala	Role	Salesforce Platform
Alias	sbsb	User License	Manager
Email	2k21it@knot.ac.in (Verify)	Profile	Manager
Username	2k21it@knot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User16951677128256452616	Marketing User	<input type="checkbox"/>
Title	owner	Offline User	<input type="checkbox"/>
Company	not 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)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input checked="" type="checkbox"/>
Delegated Approval		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 Registration: One-Time Password Authenticator	<input type="checkbox"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	<input type="checkbox"/>	Salesforce CRM Content User	<input checked="" type="checkbox"/>

mail.google.com/mail/u/0/#inbox/FMtcgzGbStlSsqKKLzCGhbDnsCXdvf

Search in mail

Active

Compose

Inbox 5,318

Starred

Snoozed

Sent

Drafts 5

More

Labels +

support@salesforce.com <support@salesforce.com> to me 7:13 PM (0 minutes ago)

1 of 5,486

salesforce

Welcome to Salesforce!

Click below to verify your account.

Verify Account


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

Username:
2k21it@knot.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&setupid=Ch...



Change Your Password

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

- 8 characters
- 3 letters
- 1 number

* New Password

Good

* Confirm New Password

Match

Security Question

In what city were you born?

* Answer


salem

Change Password

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

Login | Salesforce

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



Username

2k21it@klot.ac.in

Password


Log In

☐ Remember me

[Forgot Your Password?](#)

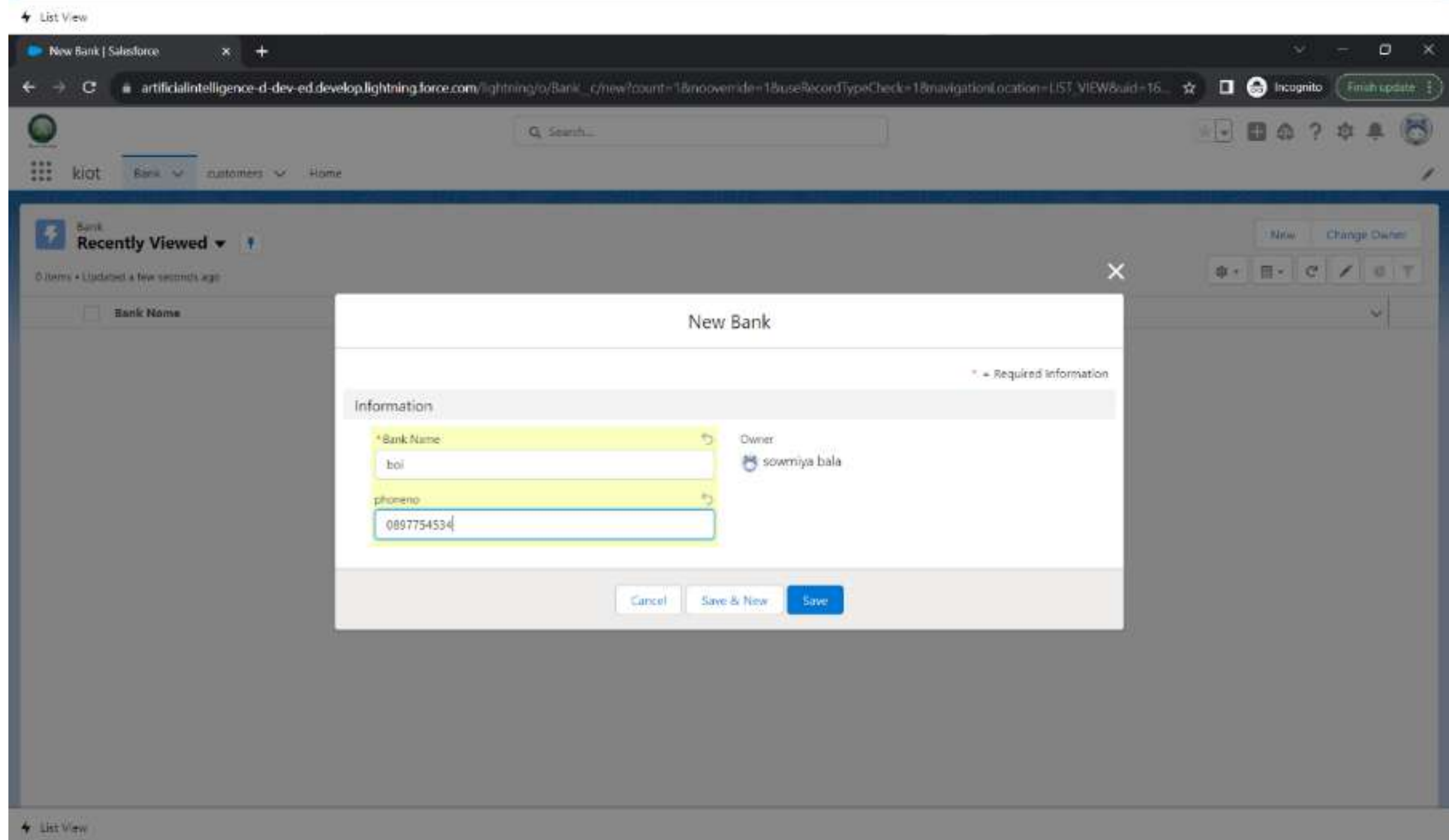
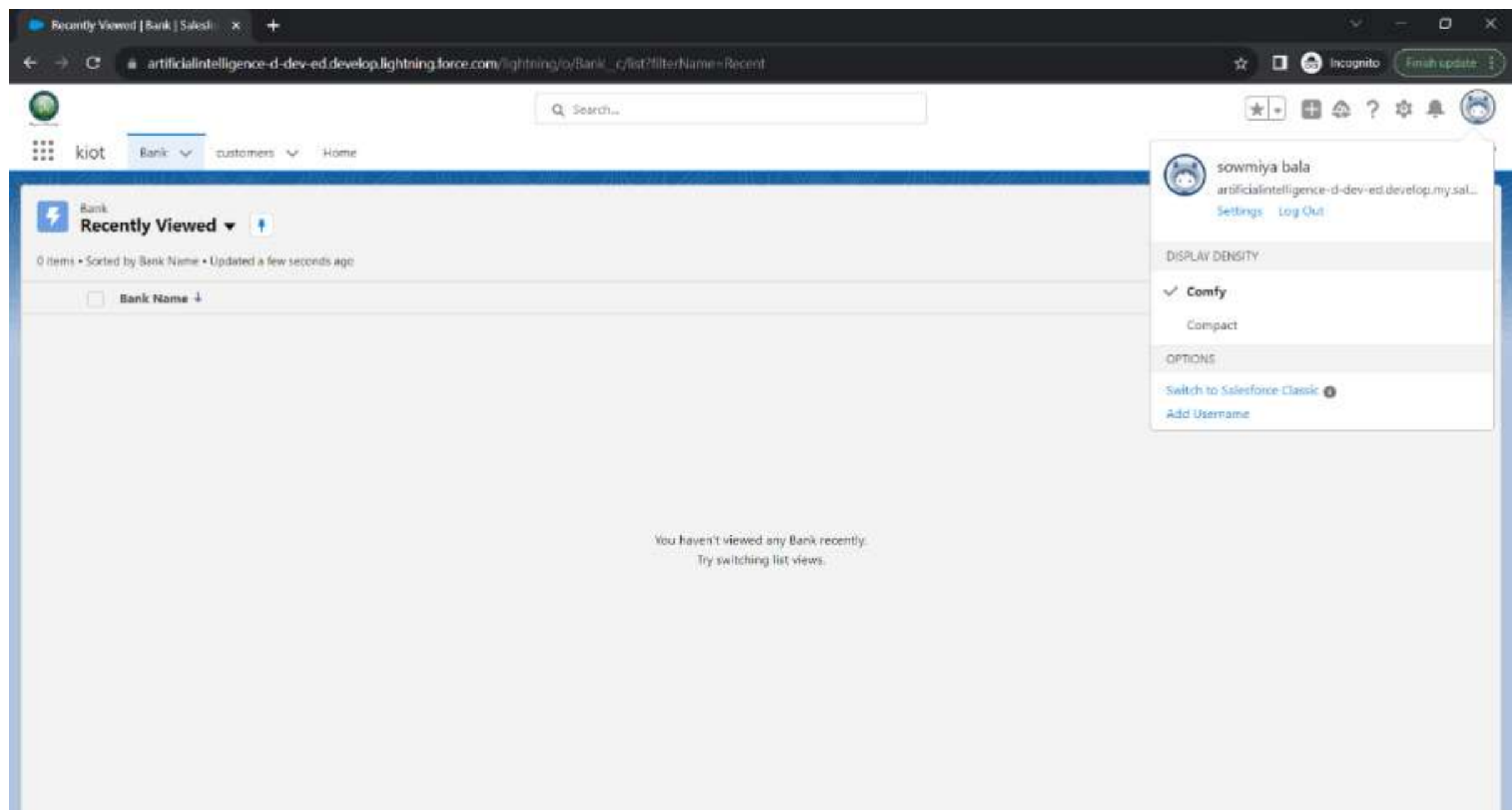
Join us for the future of trusted enterprise AI, streaming on Salesforce+.

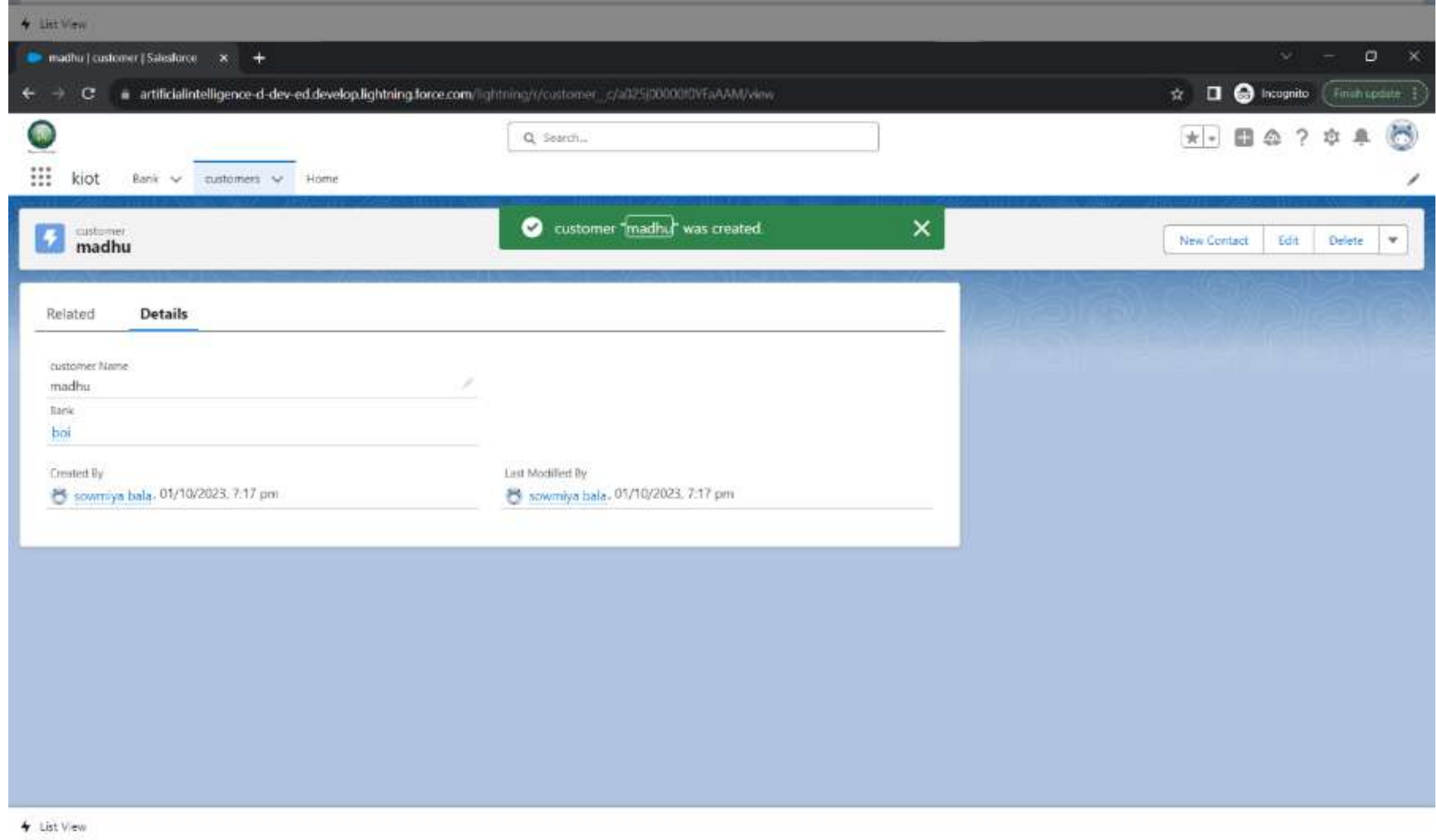
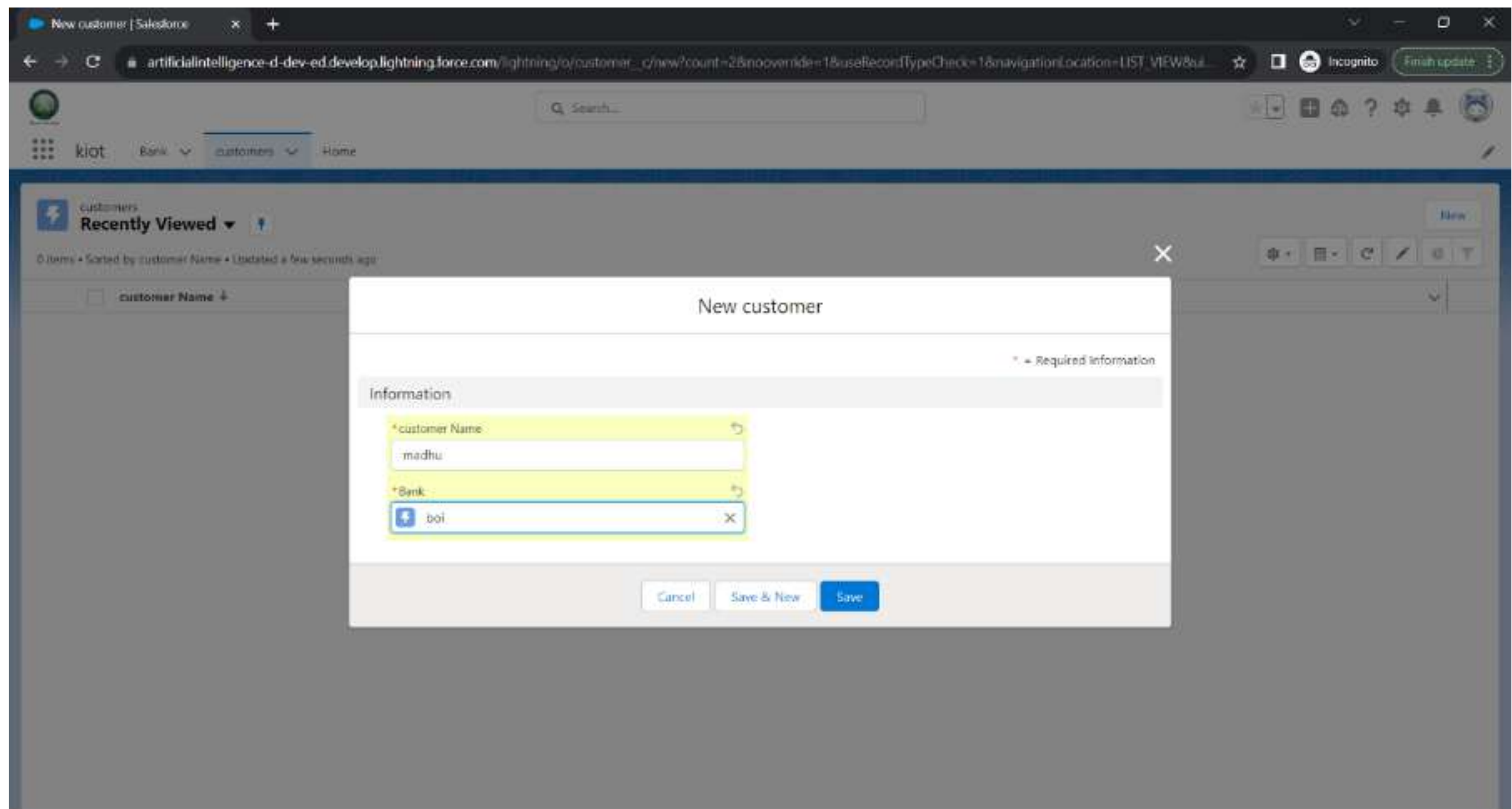
WATCH ON DEMAND



AI Day

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The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' at the top, followed by 'Home' and 'Object Manager'. Below these are various setup assistants and the 'ADMINISTRATION' section, which includes 'Users'. The main content area is titled 'Profiles' and shows a table of existing profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Standard Platform User' profile is highlighted in blue. The bottom of the page shows a pagination bar indicating '1 of 7' profiles and '0 Selected'.

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%3Fsetupid%3DEnhancedPr...

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Lightning Experience Transition Assistant
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Profiles

Profile: salesmanage

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

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

Link to Profile ID | Enabled User Clone Access (U) | Enabled Visualforce Page Access (U) | Enabled External Data Source Access (U) | Enabled Named Credential Access (U) | Enabled External Credential Principal Access (U) | Enabled Custom Metadata Type Access (U) | Enabled Custom Setting Definition Access (U) | Enabled Flow Access (U) | Enabled Service Presence Status Access (U) | Enabled Custom Permissions (U)

Profile Detail

Edit Clone Delete View Users

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

Page Layouts

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%2F%3FretURL%3D%252F0...

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Profile Edit: salesmanage

Set the permissions and page layouts for this profile.

Profile Edit

Save Save & New Cancel

Name: salesmanage

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

Visible Default

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

Service Provider Access

Tab Settings

☐ Overwrite users' personal tab customizations

Standard Tab Settings

Home Default On

Learning Default On

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Contact Fund Emails

☒

☒

☒

☒

☐

☐

User External Content

☐

☐

☐

☐

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"/>
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

☐

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Contact Fund Emails

☒

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☒

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☐

☐

User External Content

☐

☐

☐

☐

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 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 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"/>

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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

WhatsApp

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11281 Top Hits 2023

New P...

Users | Salesforce

Welcome to Salesforce. Verify y...

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2F%3FretURL%3D%252F005%253FisUserEntl...

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First Name

Last Name

Alias

Email

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Nickname

Title

Company

Department

Division

Role

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Offline User

Knowledge User

Flow User

Service Cloud User

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Site.com Publisher User

WDC User

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Data.com Monthly Addition Link

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High-Contrast Palette on Charts

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New P...

Users | Salesforce

Welcome to Salesforce. Verify y...

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2F%3FretURL%3D%252F005%253FisUserEntl...

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Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

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State/Province

Country

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Federation ID

Locale Settings

Time Zone

Locale

Language

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails

Generate new password and notify user immediately

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Save & New

Cancel

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Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails

Generate new password and notify user immediately

Save

Save & New

Cancel

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000A4LxV%3FnoRedirect%3D1%26isUserEn...

Setup Home Object Manager

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Users

User madhu b

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

User Detail

Name: madhu b, Alias: mb, Email: 2k20csd179@kiot.ac.in (Verify), Username: 2k20csd@kiot.ac.in, Nickname: User16951681242855415206, Title: worker, Company: kiot bank, Department: Sales, Division, Address: 4/194 , aryanpalayam, uthamasolapuram , Parakkadu , salem- 636305 SALEM 636305 TAMIL NADU, Time Zone: (GMT +05:30) India Standard Time (Asia/Kolkata), Locale: English (India), Language: English, Delegated Approver, Manager, Receive Approval Request Emails: Only if I am an approver, Federation ID, App Registration: One-Time Password Authenticator

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

mail.google.com/mail/u/0/#inbox/FMfcgzGbStlSsqKKLzCGhbDnsCXdvf

Search in mail

Active

1 of 4,486

Compose

Inbox 5,318

Starred

Snoozed

Sent

Drafts 5

More

Labels +

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:

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

Username:

2k20csd@kiot.ac.in

Again, welcome to Salesforce!

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

Reply Forward

Change Your Password | Salesforce

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

Incognito (3) Finish update



Change Your Password

Enter a new password for **Zk20csit@kiot.ac.in**. Make sure to include at least:

- 8 characters
- 3 letter
- 1 number

* New Password

Good

* Confirm New Password

MATCH

Security Question

In what city were you born?

* Answer

India

Change Password

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

Recently Viewed | Bank | Salesforce

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

Incognito (3) Finish update

kiot Bank customers Home

Search...

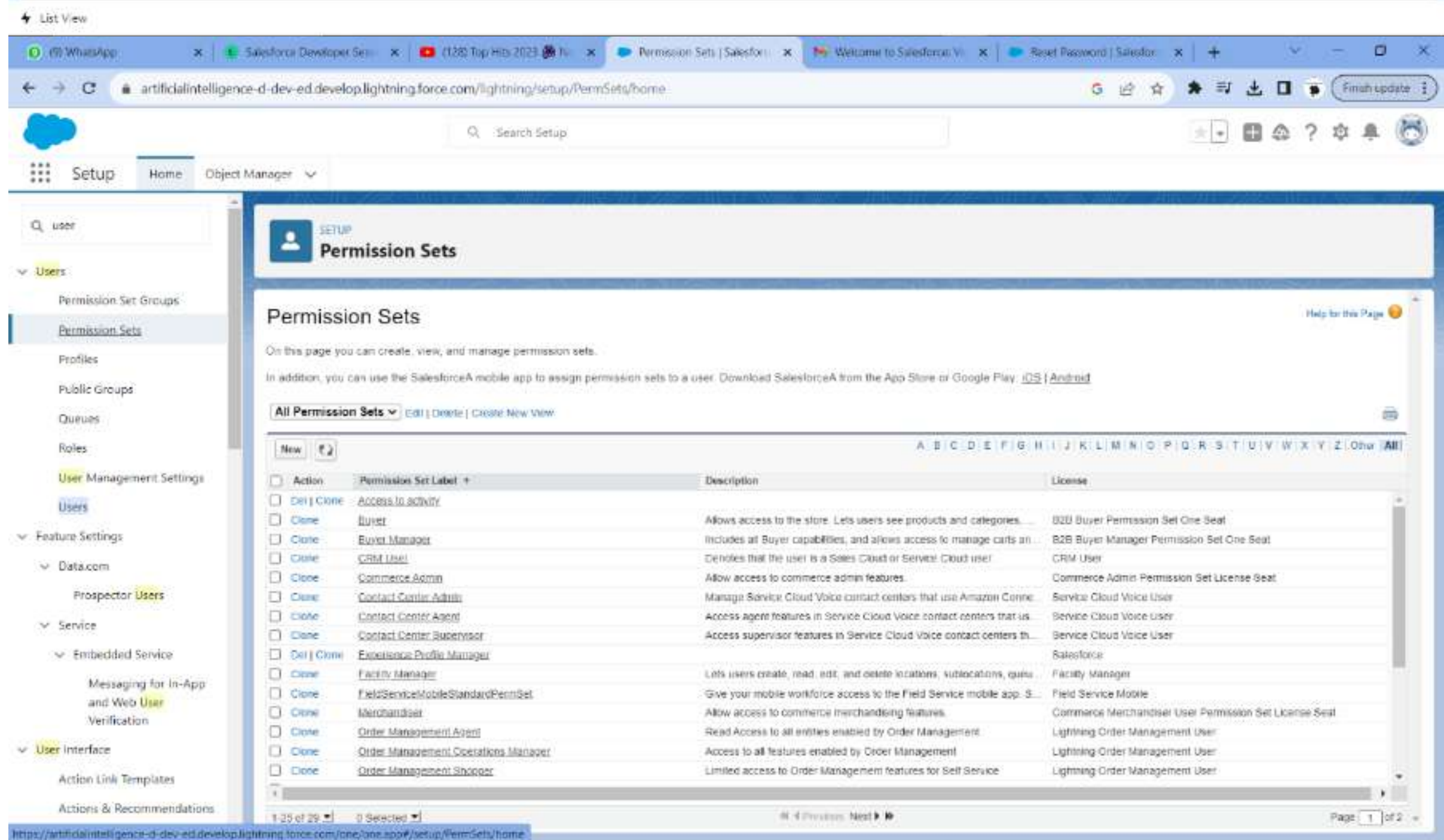
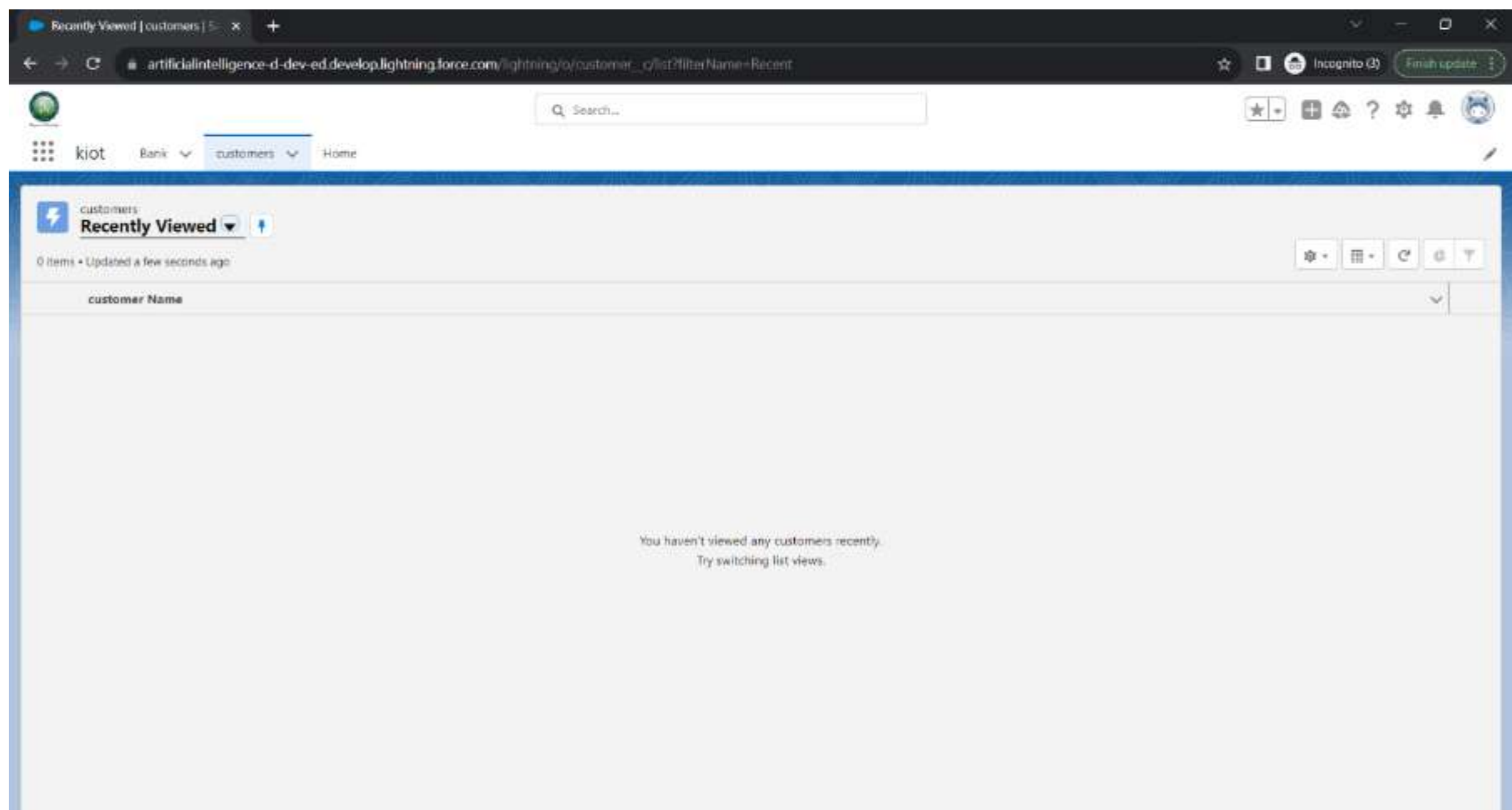
New

0 items • Updated a few seconds ago

Bank Name

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

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 User A and User B can view Account records.**

Record-Level Security:

- **Implement record-level security using Criteria-Based Sharing Rules.**
- **Create a sharing rule that shares Account records owned by User A with User A and records owned by User B with user B.**
- **For the sharing rule criteria, specify that records owned by User A are shared with user**

User A, and records owned by User B are shared with User B.

Ownership:

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

Organization-Wide Defaults:

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

Testing:

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

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

Search Setup

Setup

Home

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SETUP

Permission Sets

Help for this Page

Permission Sets

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

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

All Permission Sets

New

2

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

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

1-25 of 290 | 0 Selected | 4 Previous | Next | Page 1 of 2

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

Search Setup

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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

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

Search Setup

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Permission Set Create

Save Cancel

Enter permission set information

Label salesmanager

API Name salesmanager

Description

Session Activation Required

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License

Save Cancel

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%3FsdcdFrameOrigin%3Dhttps%253A...

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Permission Set

salesmanager

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	salesmanager
License	Namespace Prefix	
Session Activation Required	Created By	GDPALE 01/10/2023, 7:29 pm
Last Modified By		GDPALE 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 Car 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=%2F0P55j000008Phok%3Fs%3DEntityPermissions

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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	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invites	--	4	--
Appointment Schedule Approvals	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

javascript:alert("%2F0P55j000008Phok%3Fs%3DEntityPermissions%26outp%3Dp11")

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%3F%3DEntityPermissions%26o%3D...

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Permission Set

salesmanager

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview Overrid 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 checked="" type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>

artificialintelligence-d-dev-ed.develop.my.salesforce.com/one/app#/ui/one/redirect/0P55j000008Phok%3F%3DEntityPermissions%26o%3D...

Setup Home Object Manager

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Permission Set

salesmanager

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview Overrid 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 checked="" 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/0PSSJ000008Phok/PermissionSetAssignment/home

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salesmanager

Current Assignments

No assignments defined.

Add Assignment

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PSSJ000008Phok/PermissionSetAssignment/new

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App Menu

Select Users to Assign

All Users

1 item selected

Search this list...

	Full Name ↑	All...	Username	Role	Ac...	Profile
<input type="checkbox"/>	Amelia Ellington	aell	amelia.ellington.146kxcp9oodlh.d8cwpdcuo4wh.hnbdamwhtwhq.wguctpr1dalv@gmail.com		<input checked="" type="checkbox"/>	Force.com - App Subscription User
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000bcskkaab.1o0bfwmpqike@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Diya Adanna	dadann	test_dlya_pas.4w08jyb9wik.tzgrgsbkpx.3g70fofwzwns.h43tkzw6mea@gmail.com		<input checked="" type="checkbox"/>	UIMS User
<input type="checkbox"/>	GORAL S	GS	klot520@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000bcskkaab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	madhu b	mb	2k20csit@klot.ac.in		<input checked="" type="checkbox"/>	salesmanager
<input type="checkbox"/>	Security User	sec	insightsecurity@00d5j00000bcskkaab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	sowmiya bala	sbala	2k21ti@klot.ac.in		<input checked="" type="checkbox"/>	Manager

Cancel Next

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0P55j000008Pthok/PermissionSetAssignment/new

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Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date

Time Zone

Select a time zone...

Selected Users

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

Cancel Back Assign

artificialintelligence-d-dev-ed.develop.lightning.force.com/one/one.app#eyJjb2t1b25lbnREZWYiOiZXR1cF9wbGF0ZmlybV9wZXIic2pwc2F5ZXN1bHRQYWdlbW...

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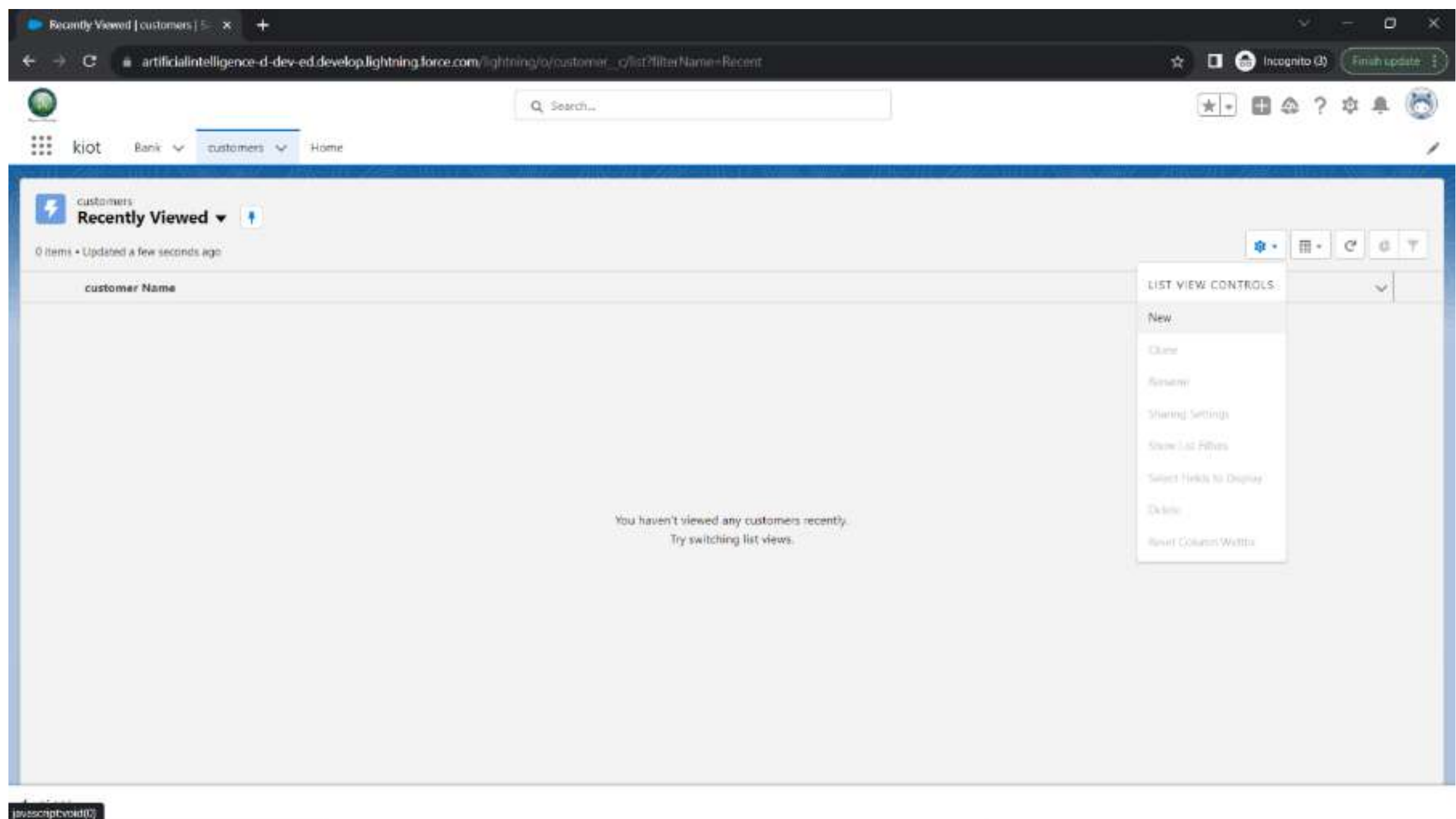
PERMISSION SET SALESMAN

1 assignments were successful

Assignment Summary

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

Done

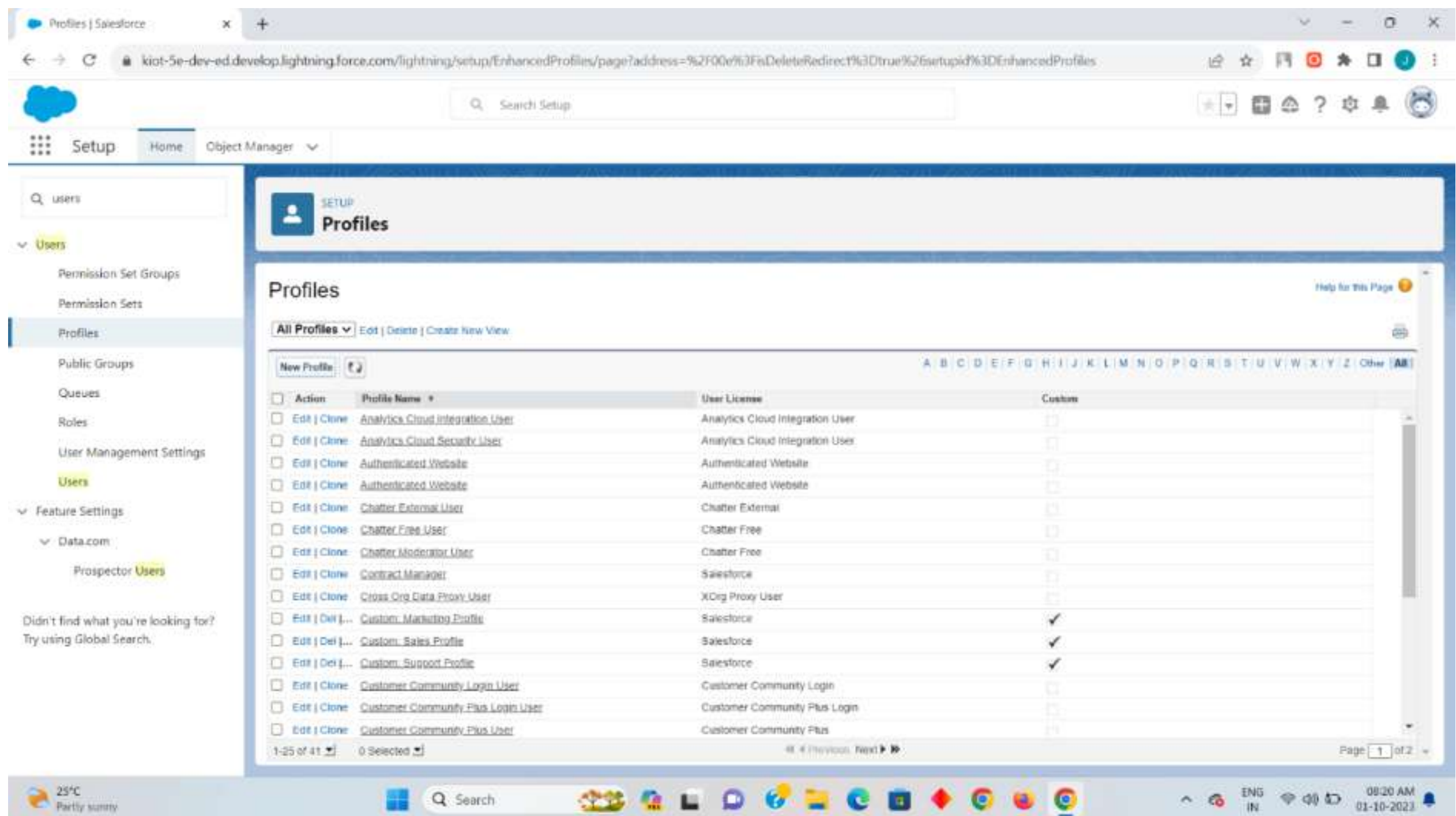


3.. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

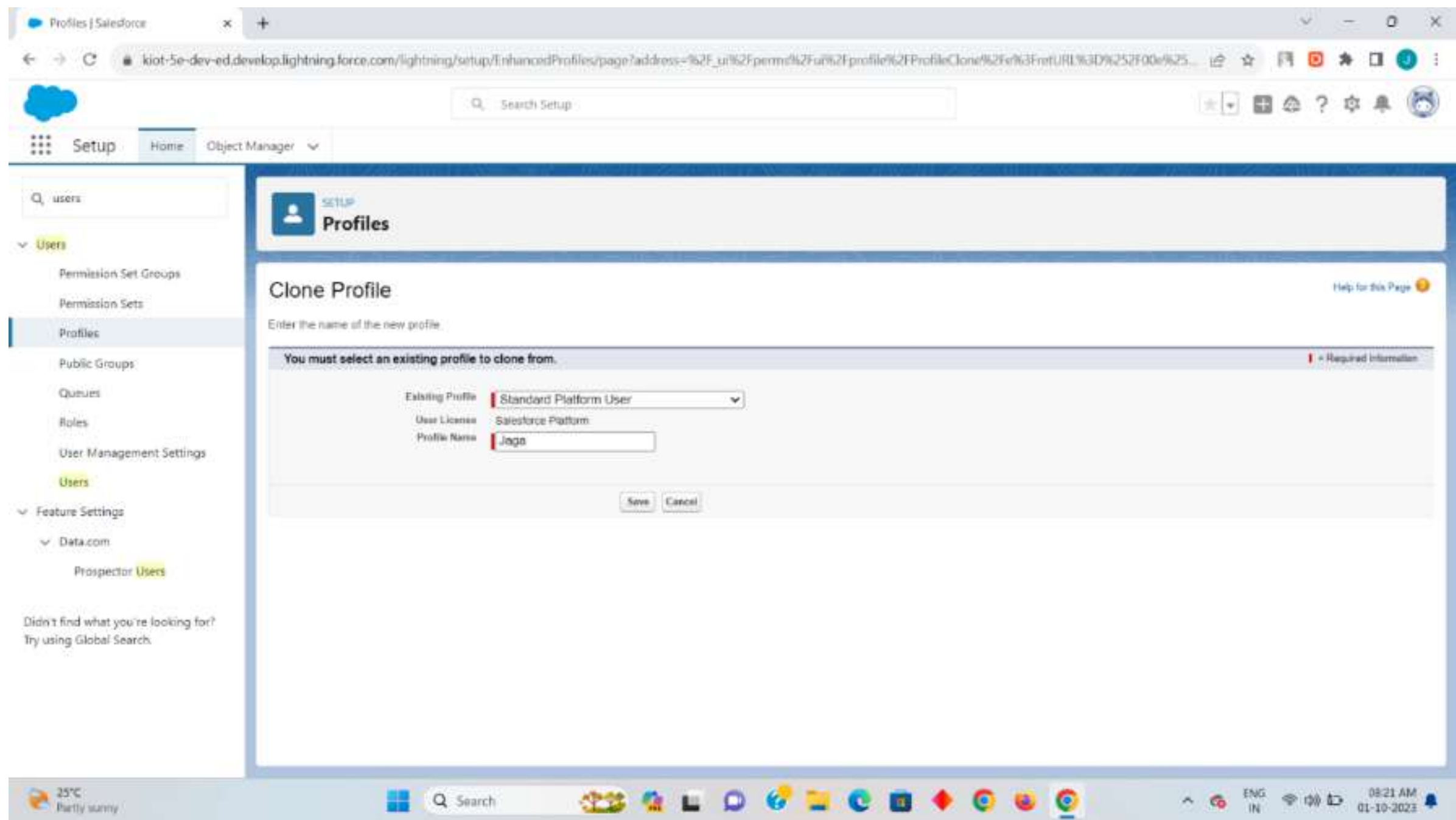
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



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 the 'Profiles' section. The profile 'Jaga' is selected. The 'Profile Detail' section shows the profile name 'Jaga', user license 'Salesforce Platform', and a 'Custom Profile' checkbox that is checked. The 'Page Layouts' section lists various standard object layouts and their assigned page layouts. The 'Profile Detail' section includes buttons for 'Edit', 'Clone', 'Delete', and 'View Users'.

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

The screenshot shows the 'Custom Object Permissions' section for the 'Jaga' profile. It displays a table of permissions for various custom objects, including 'Communication Subscription Consents', 'Communication Subscription Timings', 'Contacts', 'Contact Point Addresses', 'Contact Point Consents', and 'Contact Point Emails'. The table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The 'Session Settings' section is also visible, showing 'Session Times Out After' set to '2 hours of inactivity' and 'Session Security Level Required at Login' set to 'None'.

Custom Object Permissions	Basic Access	Data Administration
Communication Subscription Consents	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete	<input type="checkbox"/> View All <input type="checkbox"/> Modify All
Communication Subscription Timings	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete	<input type="checkbox"/> View All <input type="checkbox"/> Modify All
Contacts	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete	<input type="checkbox"/> View All <input type="checkbox"/> Modify All
Contact Point Addresses	<input type="checkbox"/> Read <input type="checkbox"/> Create <input type="checkbox"/> Edit <input type="checkbox"/> Delete	<input type="checkbox"/> View All <input type="checkbox"/> Modify All
Contact Point Consents	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete	<input type="checkbox"/> View All <input type="checkbox"/> Modify All
Contact Point Emails	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete	<input type="checkbox"/> View All <input type="checkbox"/> Modify All

Profiles | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQ2O%2F%3FretURL%3D%252F00e5j000000WQ2O%253Fsetupid...

Search Setup

Setup Home Object Manager

users

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- Permission Set Groups
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- User Management Settings

Users

Feature Settings

- Data.com
- Prospector Users

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

25°C Partly sunny

SETUP Profiles

Administration settings for standard types

Administration settings for standard types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

	Basic Access				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 checked="" type="checkbox"/>	<input type="checkbox"/>
Resources	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

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

Enable different Experience Cloud login policies for employees.

Separate Experience Cloud site and Salesforce login authentication for employees. ☐

Relax login IP restrictions. ☐

Skip employee device activation during Experience Cloud site login. ☐

Profiles | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQ2O%2F%3FretURL%3D%252F00e5j000000WQ2O%253Fsetupid...

Search Setup

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

25°C Partly sunny

SETUP Profiles

Profile Edit

Profile Name: Jaga

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

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

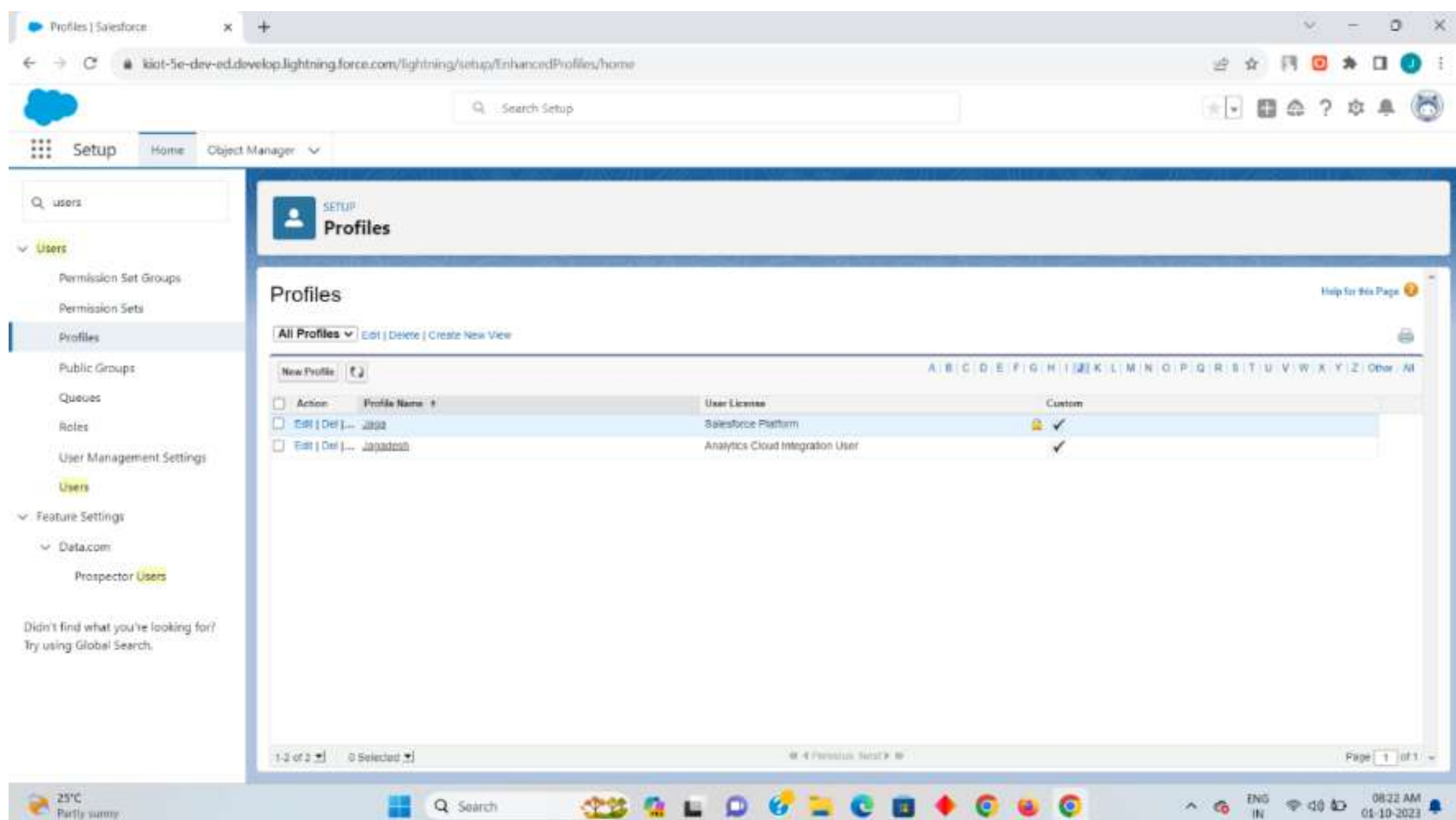
Service Provider Access

Tab Settings

☐ Override users' personal tab customizations

Step 4

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

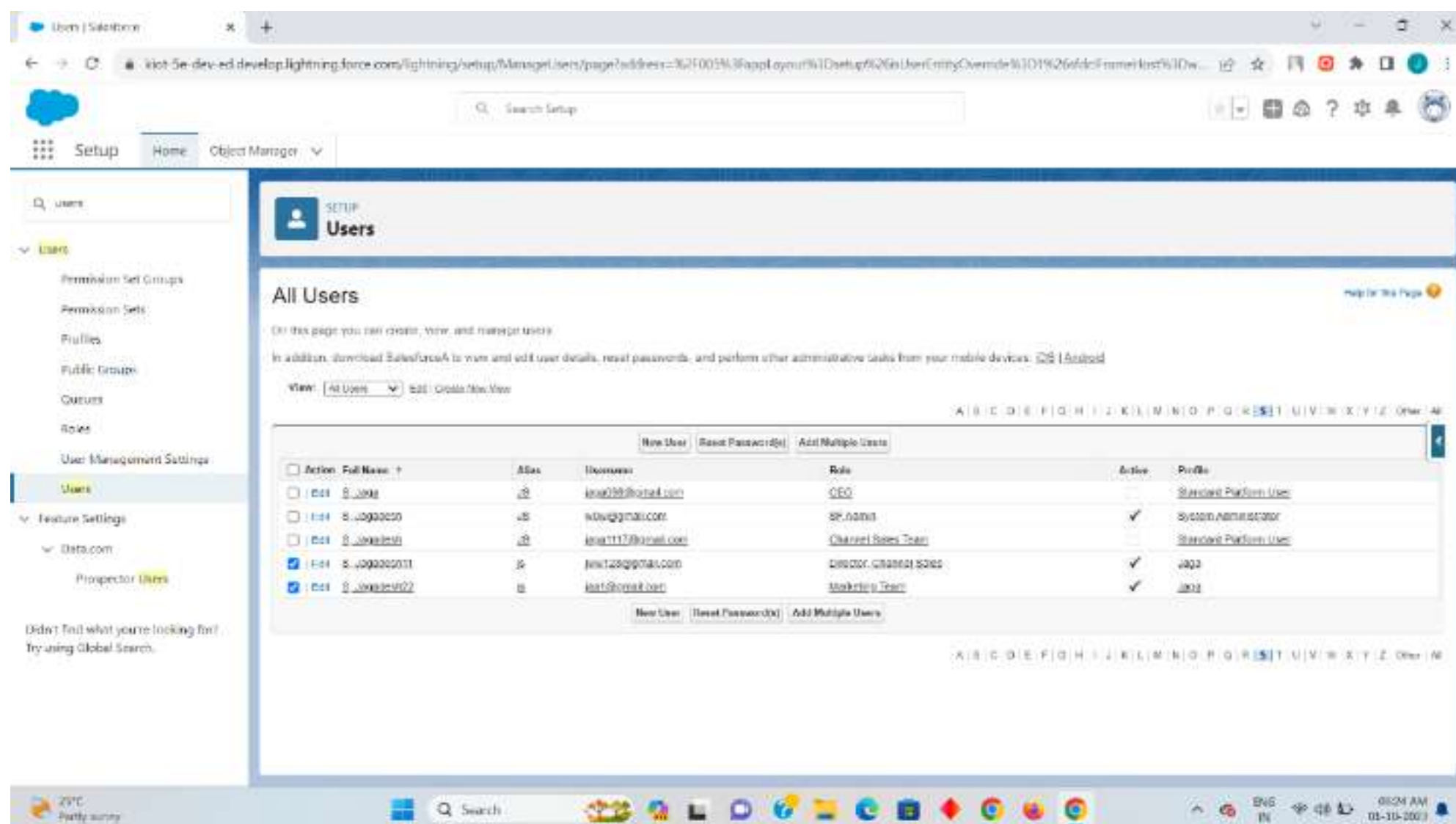


The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Profiles' and displays a table of existing profiles. The table has columns for Action, Profile Name, User License, and Custom. Two profiles are listed: 'jaga' (Salesforce Platform) and 'jagadosh' (Analytics Cloud Integration User). Both profiles have a 'Custom' checkbox checked. The bottom of the screen shows a Windows taskbar with the date and time as 08:22 AM on 01-10-2023.

Action	Profile Name	User License	Custom
Edit Del ...	jaga	Salesforce Platform	<input checked="" type="checkbox"/>
Edit Del ...	jagadosh	Analytics Cloud Integration User	<input checked="" type="checkbox"/>

Step 5:

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



Now you can preview your two user that you have created in my side I had create the two users a Jagadeesh11 and Jagadeesh22 as a director channel sales with the marketing team.

Step 6:

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

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

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

The screenshot shows the Salesforce 'Permission Sets' page in a web browser. The browser's address bar displays the URL: `localhost:54242/develop.lightning.force.com/lightning/setup/PermSets/home`. The page header includes the Salesforce logo, a search bar, and navigation tabs for 'Setup', 'Home', and 'Object Manager'. A left-hand sidebar contains a search bar and a list of navigation items: 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', and 'Projector Users'. The main content area is titled 'Permission Sets' and includes a sub-header 'On this page you can create, view, and manage permission sets.' Below this, there is a table listing various permission sets. The table has columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists 14 permission sets, including 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Ecommerce Profile Manager', 'Facility Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order Management Agent', and 'Order Management Operations Manager'. The bottom of the page shows a Windows taskbar with the date and time '06:24 AM 01-10-2023'.

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

Permission Sets | Salesforce

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

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.

Permission Sets

Create

Save Cancel

Enter permission set information

Label permission12

API Name permission12

Description

Session Activation Required

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License --None--

Save Cancel

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page/address=%2F0P5j000008Pgt%3FsfdcFrameOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

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.

Permission Sets

permission12

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	permission12
License	Namespace Prefix	
Session Activation 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 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

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Pgtar%3F%3DEntityPermissions

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

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	-
Accounts	No Access	44	-
AI Insight Reasons	No Access	-	-
AI Record Insights	No Access	-	-
Alternative Payment Methods	No Access	27	-
API Anonymous Event Stores	No Access	14	-
App Analytics Query Requests	No Access	-	-
Application Usage Assignments	No Access	-	-
Appointment Categories	No Access	3	-
Appointment Invitations	No Access	17	-
Appointment Invites	-	4	-
Appointment Schedule Appointments	No Access	-	-
Appointment Schedule Logs	No Access	-	-
Appointment Task Time Slots	No Access	6	-
Asset Actions	No Access	30	-
Asset Action Sources	No Access	18	-

25°C Partly sunny

Search

ENG IN 08:25 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Pgtar%3F%3DEntityPermissions%26%3DAccount

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

Permission Sets

permission12

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Accounts

Accounts

Edit

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
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input type="checkbox"/>	<input type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	<input type="checkbox"/>	<input type="checkbox"/>

javascript:alert("%2F0P55j000008Pgtar%3F%3DEntityPermissions%26%3DAccount%26idp%3Dg11");

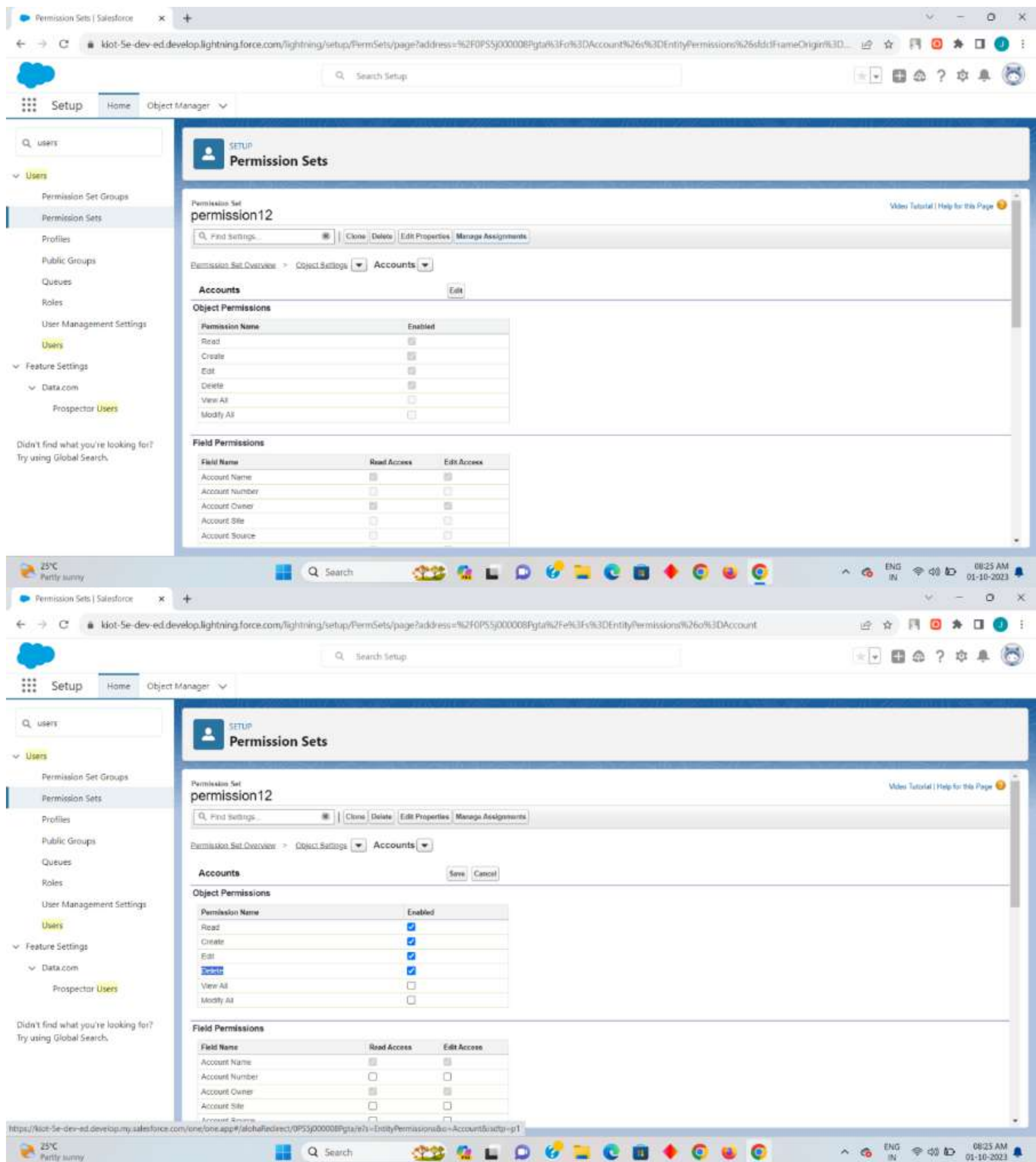
25°C Partly sunny

Search

ENG IN 08:25 AM 01-10-2023

Step 7:

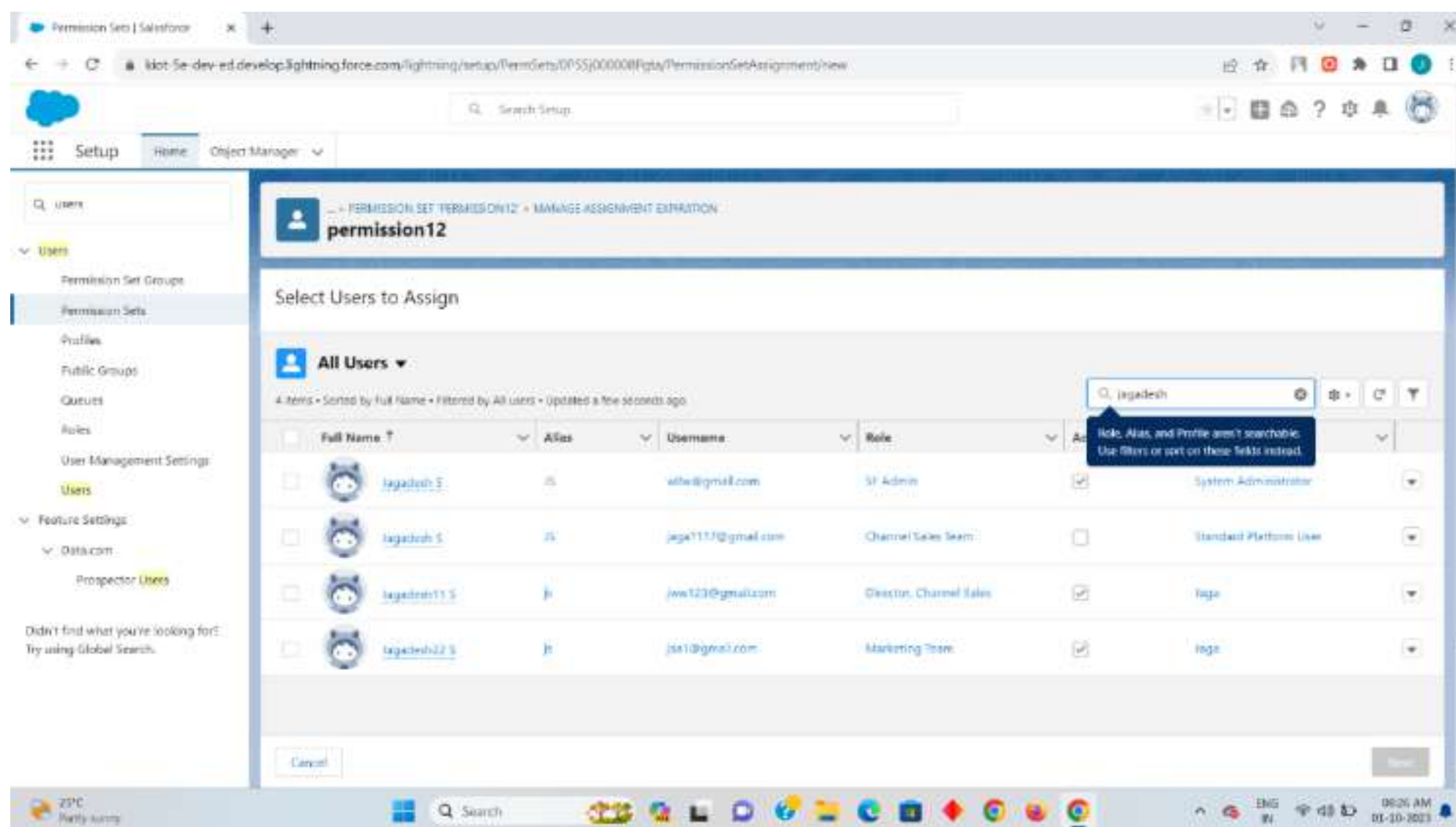
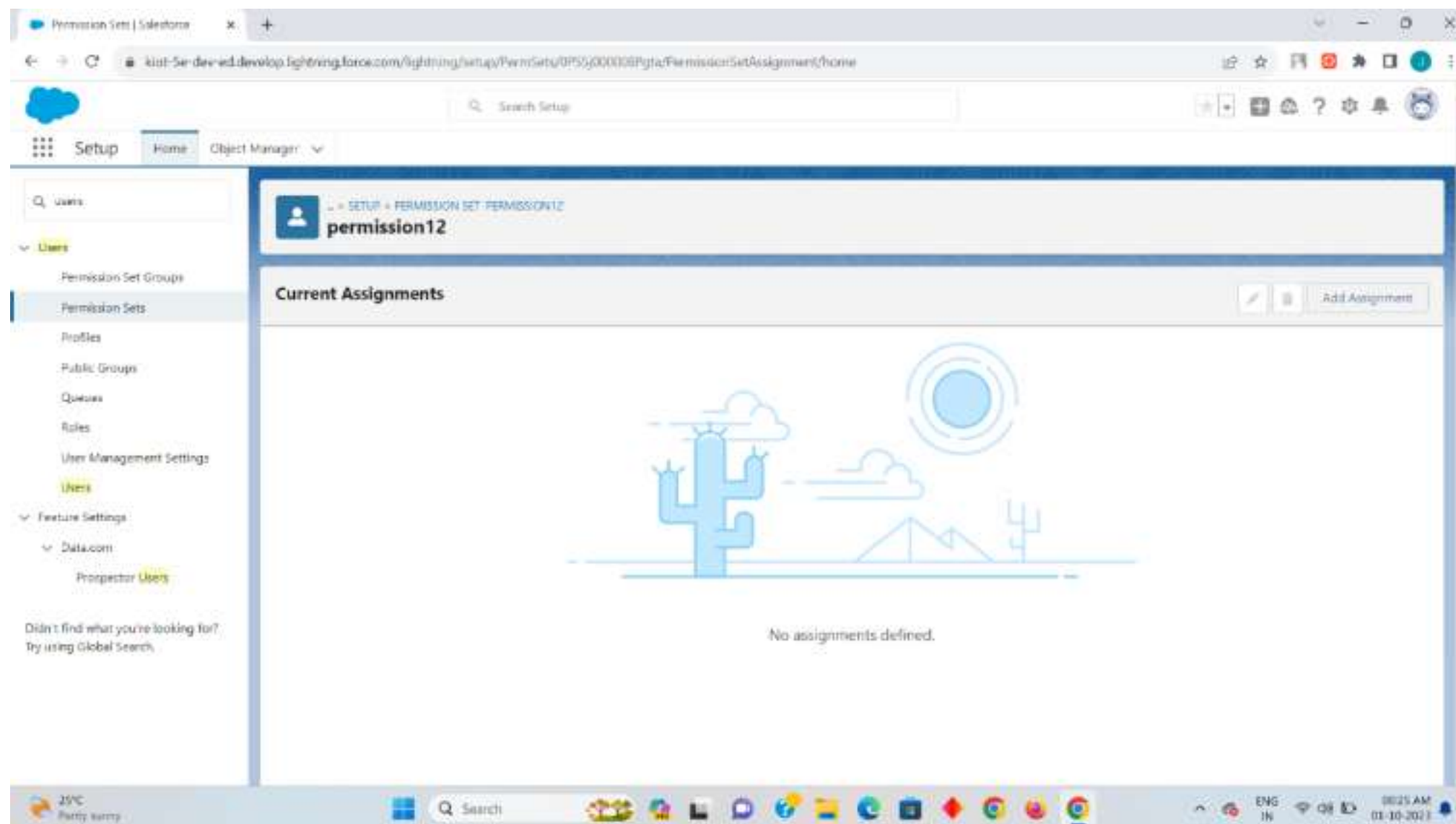
Now to give the specific delete access to the user click on edit on the Account and then enable the read, create, edit and the delete on it so that the permission set will have a specific special access on it. Once it has been done click on save and then click on manage assignment.

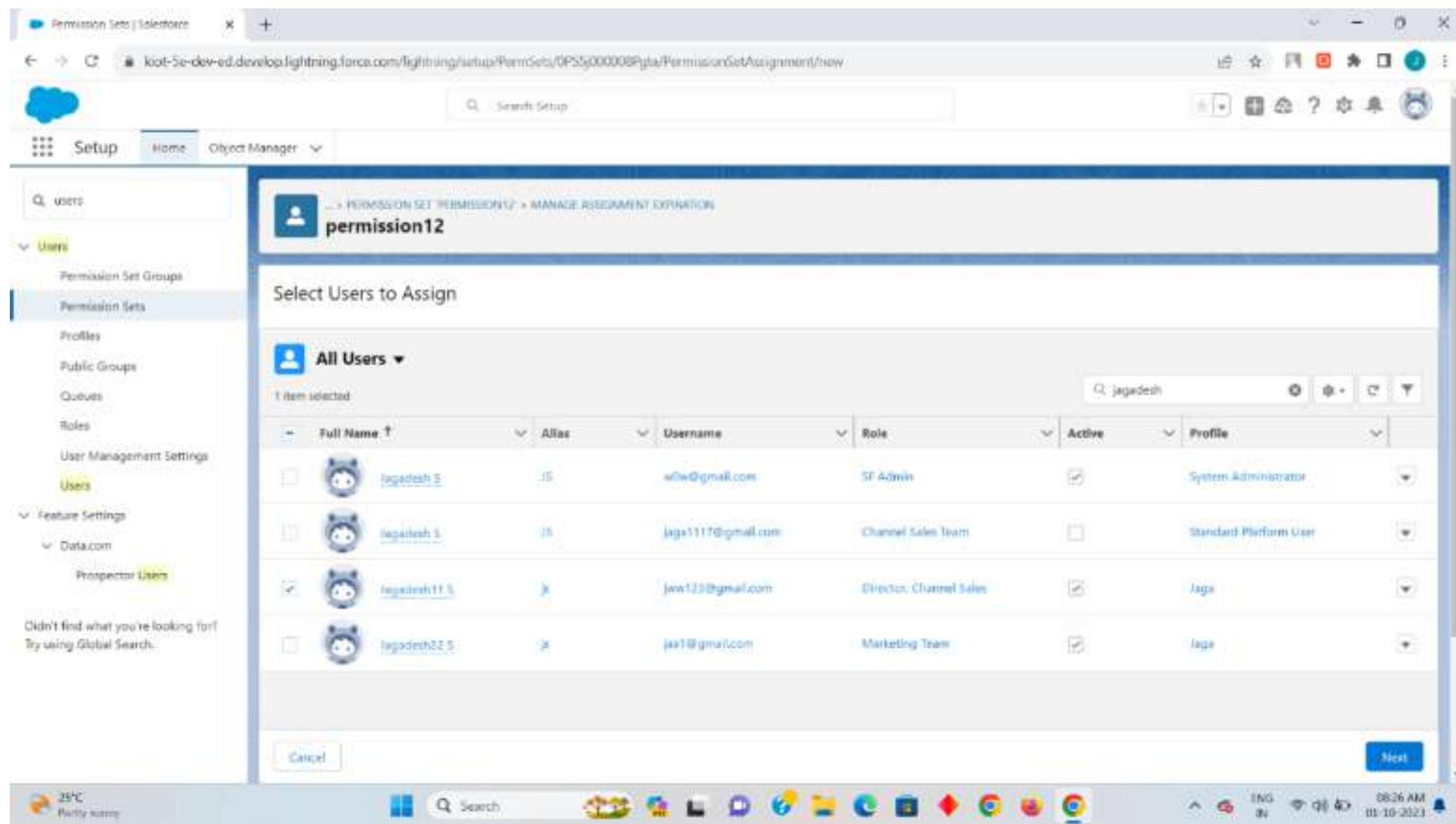


Step 8

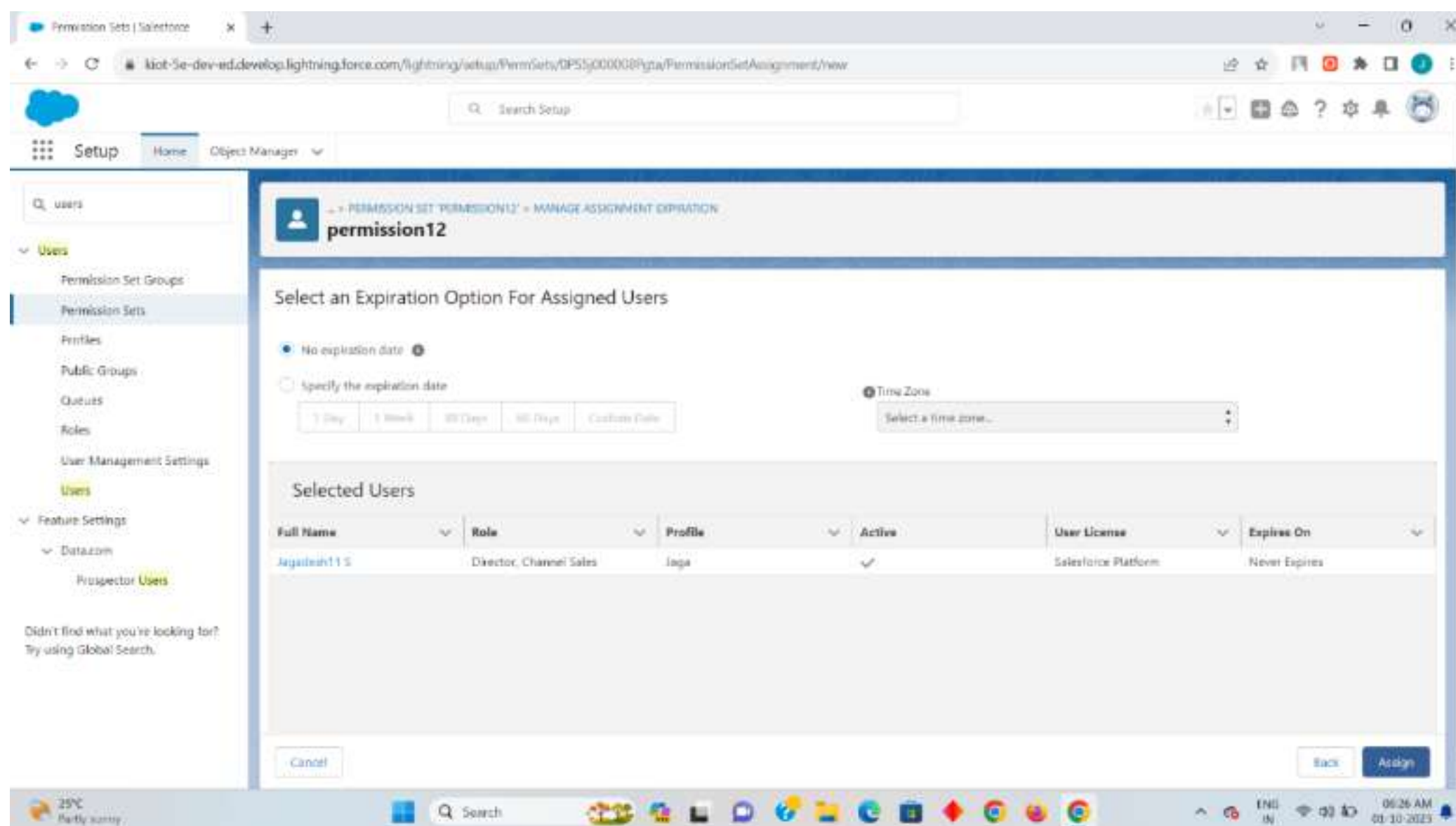
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click

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

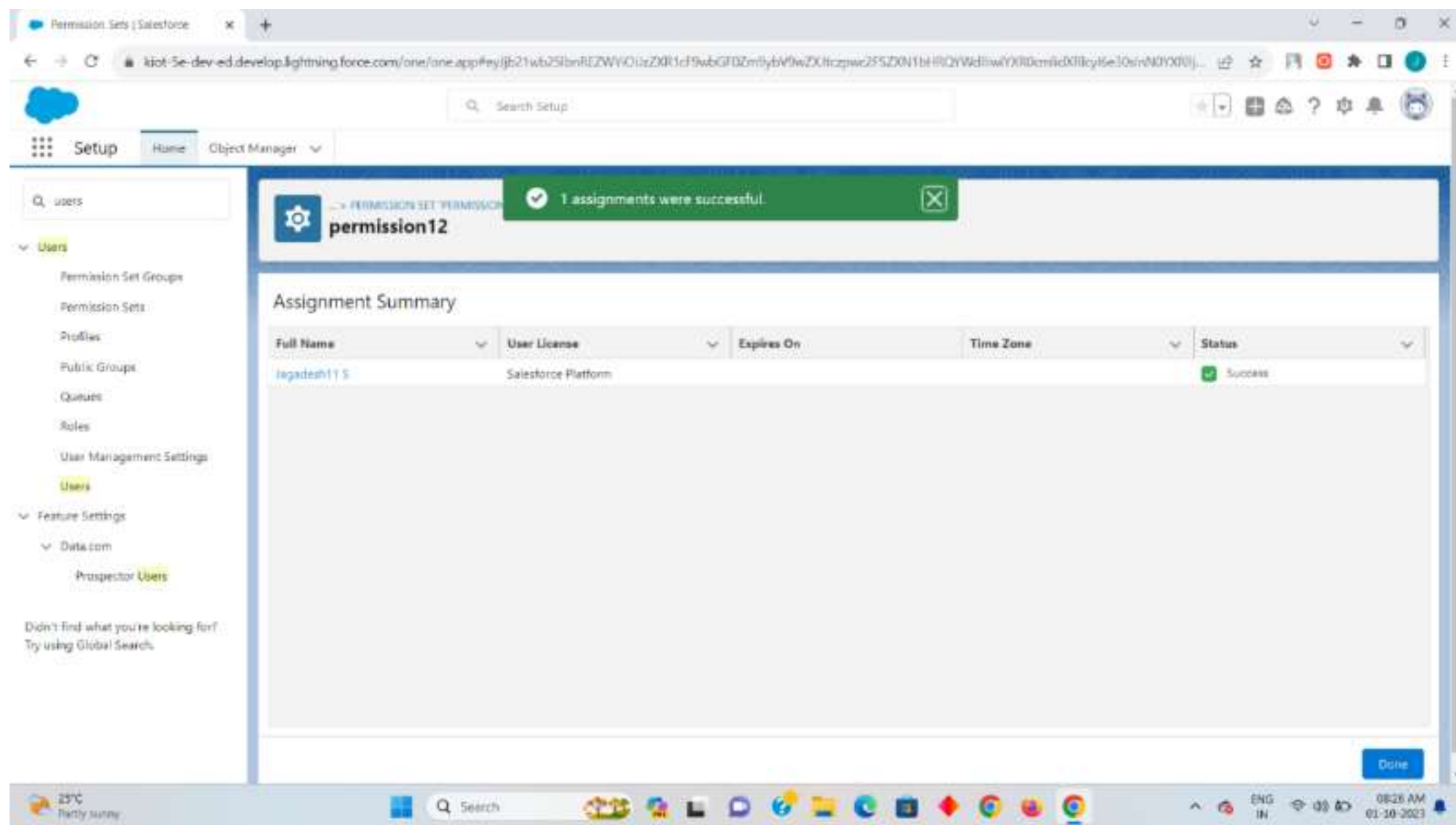




Click ♥ on next.



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.**

SETUP > OBJECT MANAGER

Survey Result

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

Fields & Relationships

Q Quick Find

8 Items, Sorted by Name (ascending)

New

Deleted Fields

Field Dependencies

Set History Tracking

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.

4. Name the Email Alert and click the Tab button. The Unique Name will populate.
5. For Object select SurveyResult.
6. For the Email Template chooses Lightning Email Template Thank You Email – Survey.
7. For Recipient Type select EmailField:Email.
8. Click Save.

Edit Email Alert [Help for this Page](#)

Survey - Thank You Email

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

Email Alert Edit Save Save & New Cancel

Edit Email Alert ! = Required Information

Description

Unique Name ⌵

Object

Email Template 🔍

Protected Component ☐

Recipient Type ! for: Find

Recipients

Available Recipients		Selected Recipients
User: Integration User	<div>Add</div> <div>Remove</div>	Email Field: Email
User: Rakesh Gupta		
User: Security User		

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

Additional Emails

From Email Address !

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

Save Save & New Cancel

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

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

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

1. Drag-and-drop the Create Records element onto the Flow designer.
2. Enter a name in the Label (Save Response) field; the API Name will auto-populate.
3. For How Many Records to Create – select one.
4. For How to Set the Record Fields – select Use separate resources, and literal values.

5. Select the **Survey_Result__c** object from the dropdown list.
6. Set Field Values for the Survey Result
 1. Row 1:
 1. Field: **Comment__c**
 2. Value: **{!Comment}**
 2. Click **Add Row**
 3. Row 2:
 1. Field: **Email__c**
 2. Value: **{!Email.value}**
 4. Click **Add Row**
 5. Row 3:
 1. Field: **Name__c**
 2. Value: **{!Name.firstName}**
{!Name.lastName}
 6. Click **Add Row**
 7. Row 3:
 1. Field: **Rating__c**
 2. Value: **{!Rating}**
7. Click **Done**.

3. In the Action box, type Survey- Thank You Email.
4. Click on the Survey- Thank You Email email alert.
5. Click Done.

Edit "Survey - Thank You Email" email alert

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

* Label * API Name

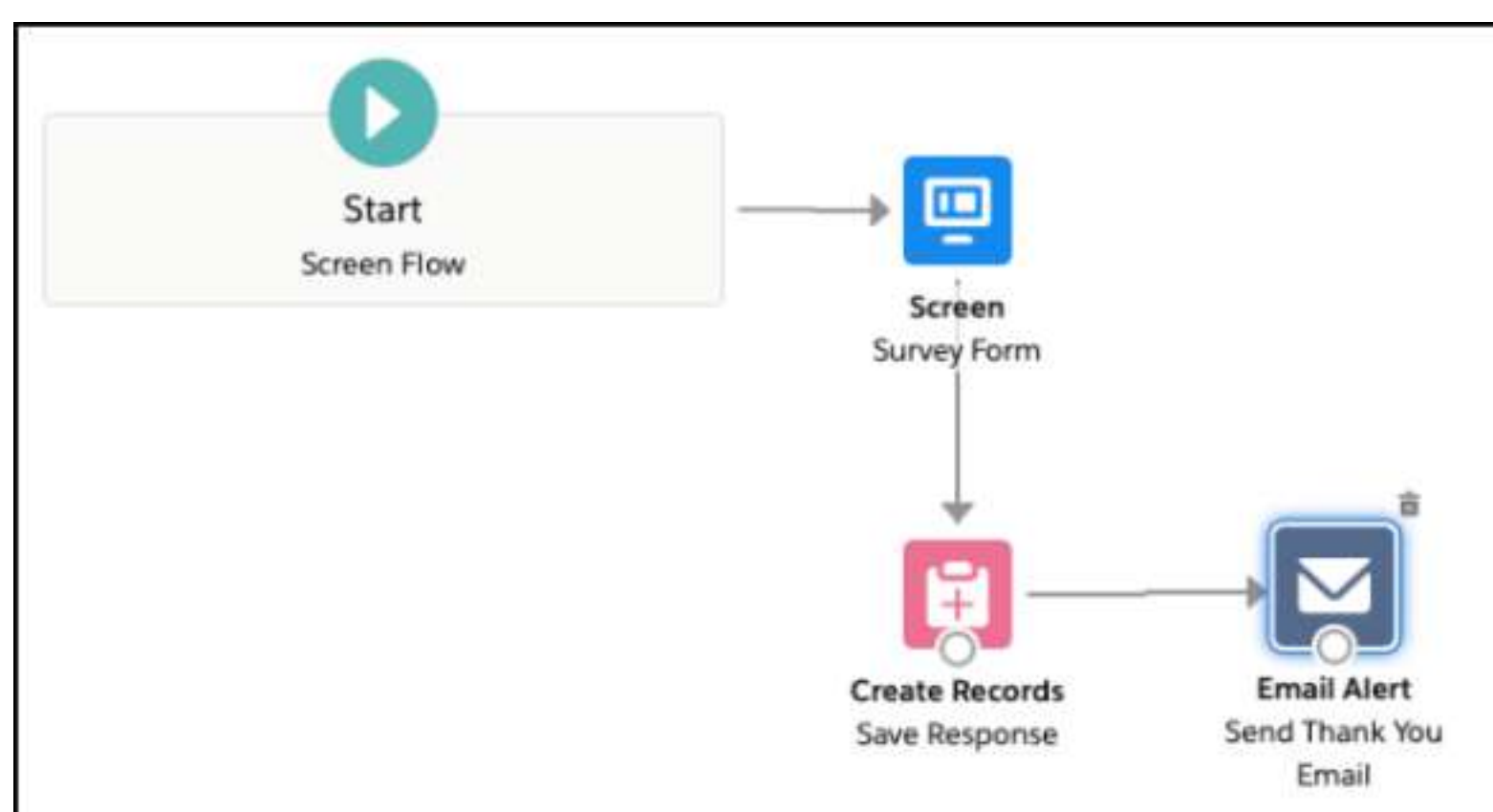
Description

Set Input Values

* Record ID

Cancel Done

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



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

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

Save as

A New Version

A New Flow

* Flow Label

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

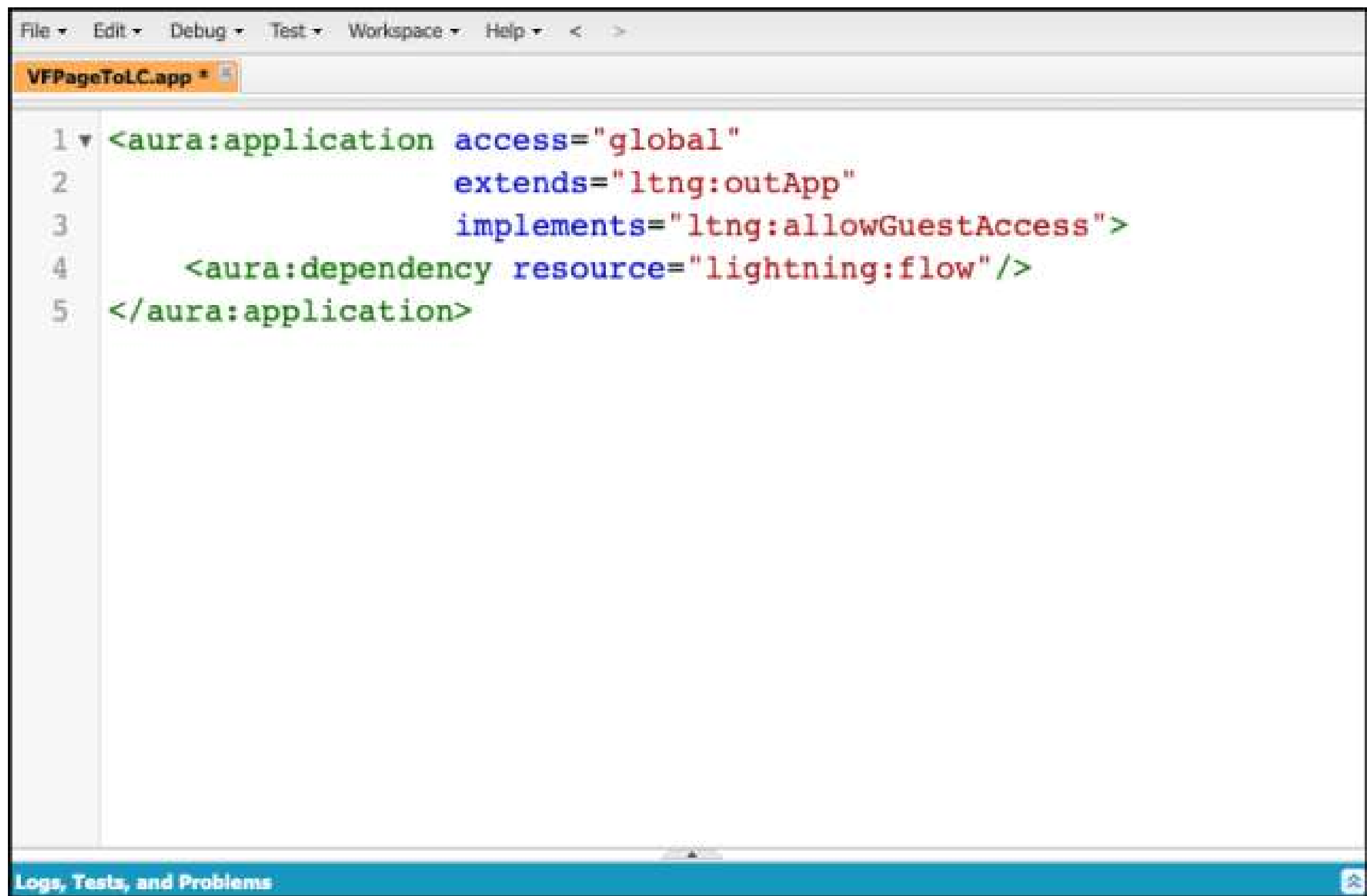
Cancel

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 (VFPageTLC) field, make sure to select the Lightning Out Dependency App checkbox.**
- 4. Click Submit.**
- 5. Copy code from GitHub and paste it into your Lightning Application.**
- 6. Save your code.**



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

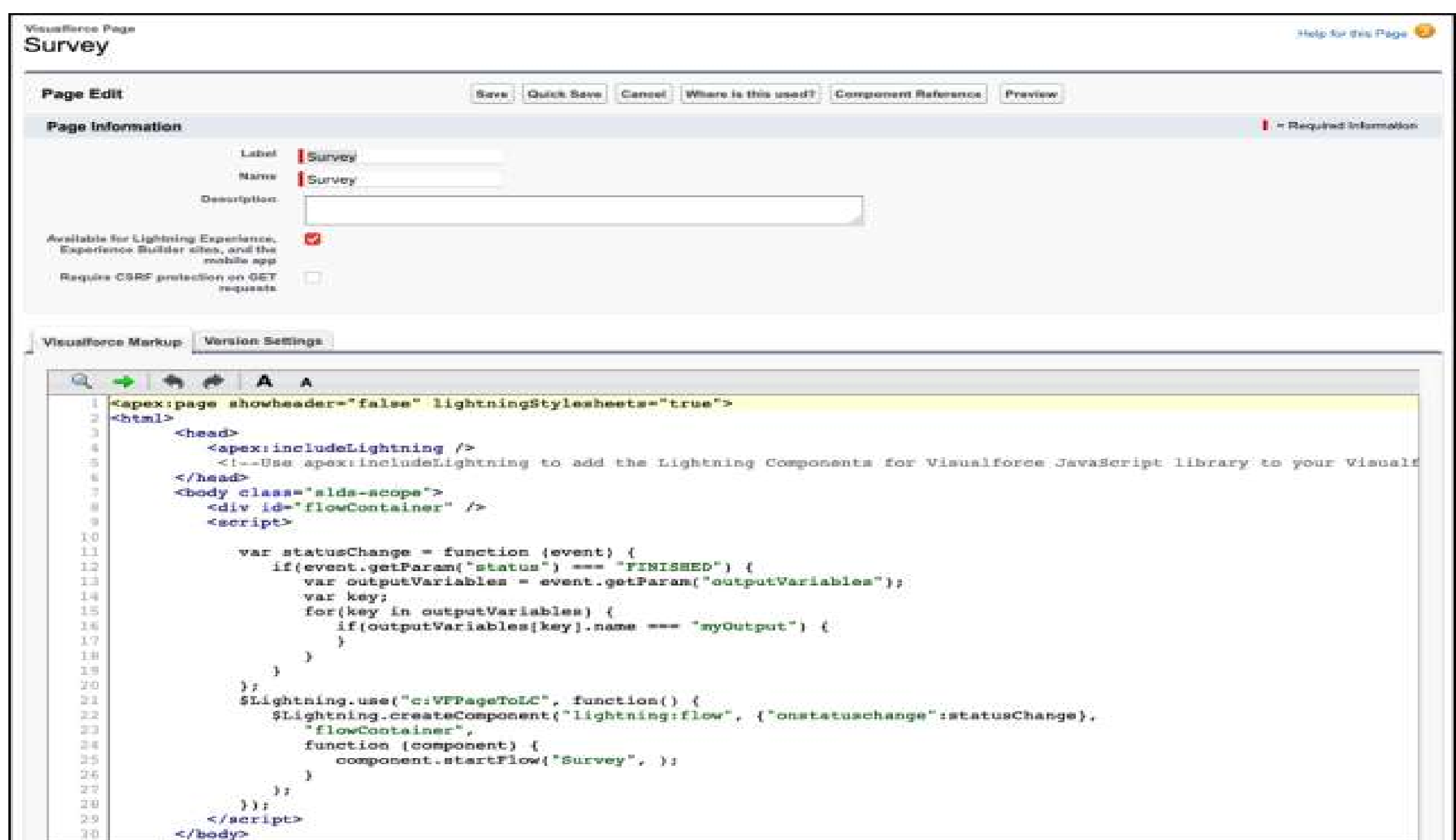
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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://kalihar-developer-edition.gus.force.com/ survey [i]

Active: ☒ [i]

Active Site Home Page: Survey [Preview]

Inactive Site Home Page: InMaintenance [Preview]

Site Template: SiteTemplate [i]

Site Robots.txt: [Text Field]

Site Favorite Icon: [Text Field]

Analytics Tracking Code: [Text Field]

URL Rewriter Class: [Text Field]

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

Sinfal

*Email

*Rating

5

*Comment

Awesome Blog

Next

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

