

Naan Mudhalvan
Salesforce
Developer(Course)
Assignment no 1

Name : MATHUMITHA S
Naan Mudhalvan id :
au611420104038
Year & Dep : 4th year & CSE
Batch : 2024
Zone no : Zone 8

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

Solution:

Step 1: Create Custom Objects

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

Setup

Home

Object Manager

Search Setup

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. [Tailor to meet](#) [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

None

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account name" and for Case it is "Case Number". Note that the Record Name 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"

Setup | Home | **Object Manager**

Object Manager

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: **Example:** Account

Plural Label: **Example:** Accounts

Starts with vowel sound: ☐

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

Object Name: **Example:** Account

Description:

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

Content Name:

Enter Record Name Label and Format

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

Record Name: **Example:** Account Name

Date Type:

Optional Features

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

Object Classification

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

☒ Allow Sharing
☒ Allow Bulk API Access
☒ Allow Streaming API Access

Deployment Status [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](#)

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

Help for this Page

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.

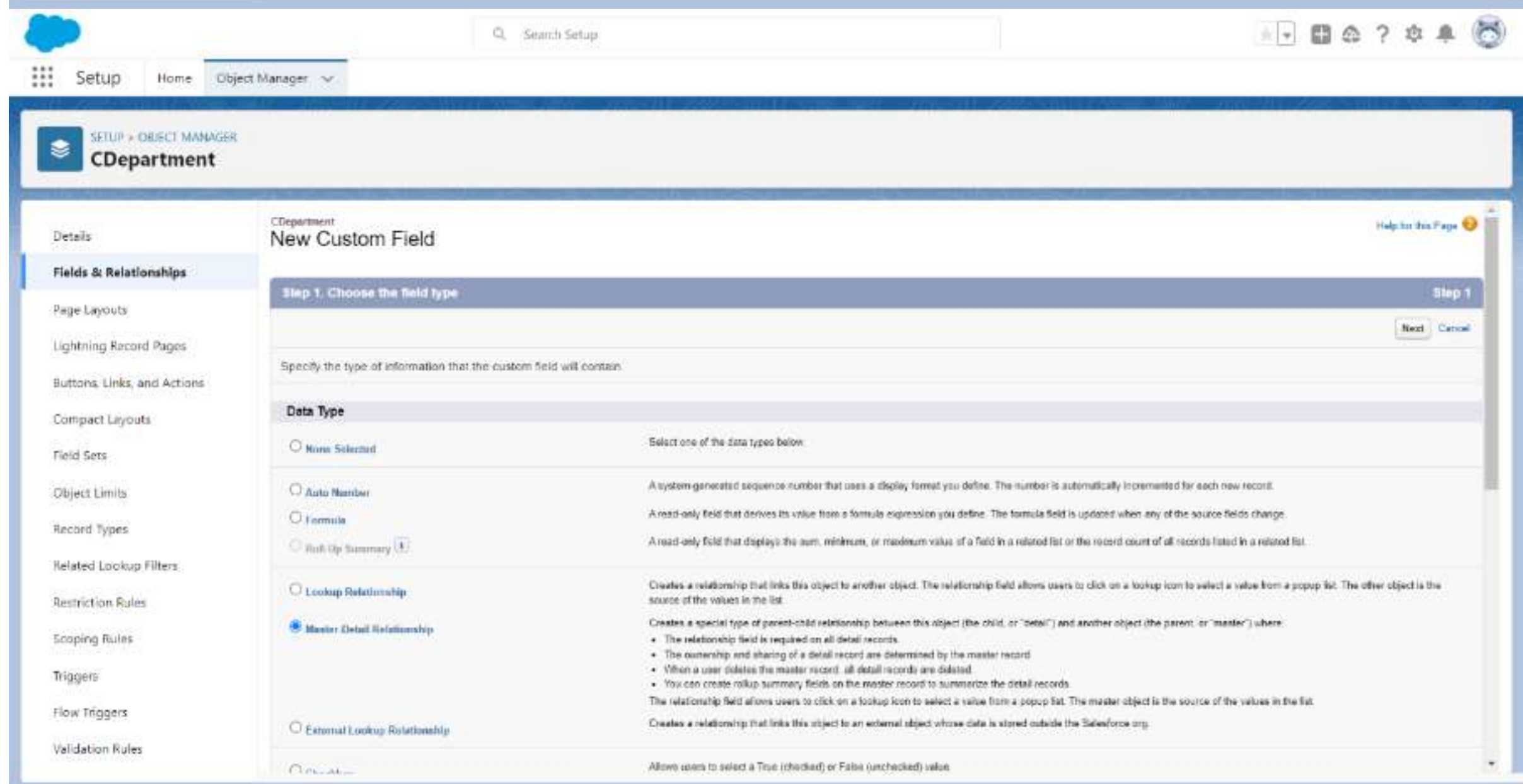
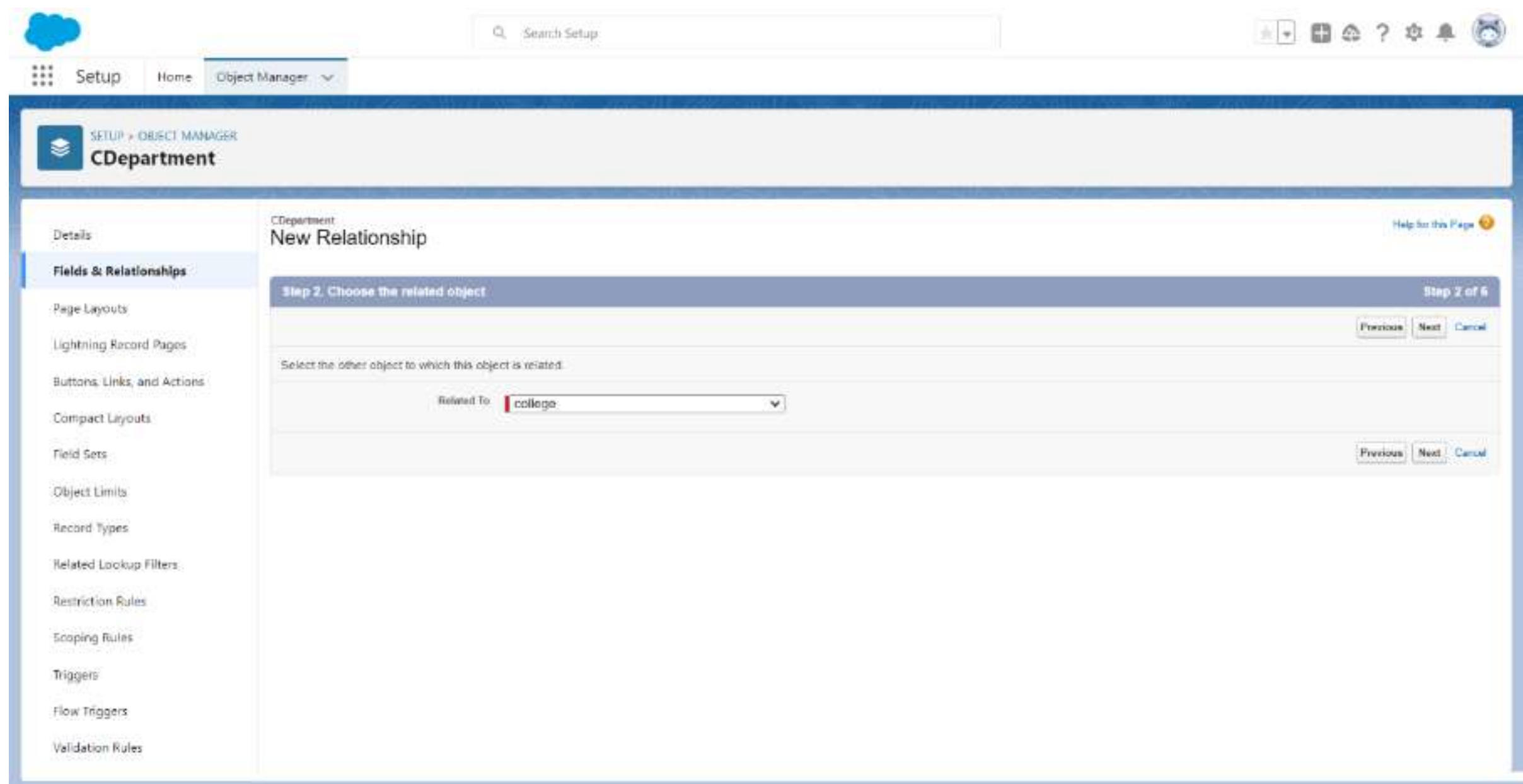
Allow reparenting

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 > OBJECT MANAGER

CDepartment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

4 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

Setup

Home

Object Manager

Search Setup

Setup

Tabs

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

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	Bank1	 Bank1	
Edit Del	Research Proposal	 Research Proposal	
Edit Del	student	 student	

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.

cloud

cole

Setup

Home

Object Manager

cloud

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

Previous Save & New Save Cancel

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

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

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

☒ Add Field

Page Layout Name
college Layout

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

Previous Save & New Save Cancel

cloud

cole

Setup

Home

Object Manager

cloud

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 4. Establish field-level security

Step 4 of 5

Previous Next Cancel

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

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

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

Setup

Home

Object Manager

college

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 3. Define the summary calculation

Step 3 of 5

Previous

Next

Cancel

Select Object to Summarize

Required Information

Main Objectcollege

Summarized ObjectCDepartments

Select Roll-Up Type

COUNT

SUM

MIN

MAX

Field to Aggregate

Filter Criteria

All records should be included in the calculation

Only records meeting certain criteria should be included in the calculation

Previous

Next

Cancel

Setup

Home

Object Manager

college

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 2. Enter the details

Step 2 of 5

Previous

Next

Cancel

Field LabelTotal count

Field NameTotal_count

Description

Help Text

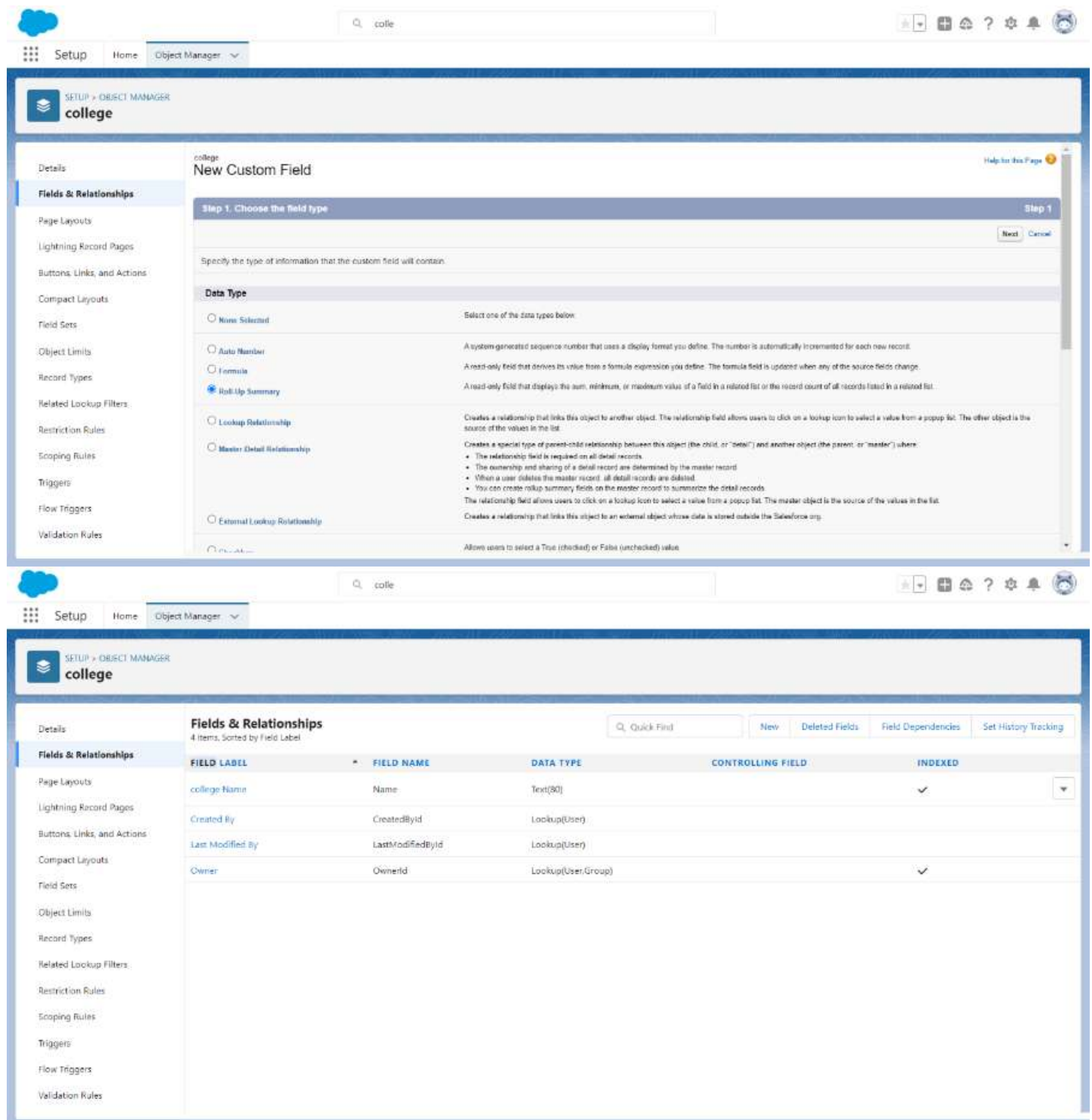
Auto add to custom report type

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

Previous

Next

Cancel



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.**

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.



New Custom Object Tab

Help for this Page

Step 2. Add to Profiles

Step 2 of 3

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

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

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

Previous

Next

Cancel

Setup

Home

Object Manager

Search Setup

Setup

Tabs

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

New Custom Object Tab

Help for this Page

Step 1. Enter the Details

Step 1 of 3

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

Select an existing custom object or create a new custom object now

Objectcollopa

Tab StyleJewel

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

Splash Page Custom LinkNone

Enter a short description

Description

NextCancel

Setup

Home

Object Manager

Search Setup

Setup

Tabs

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

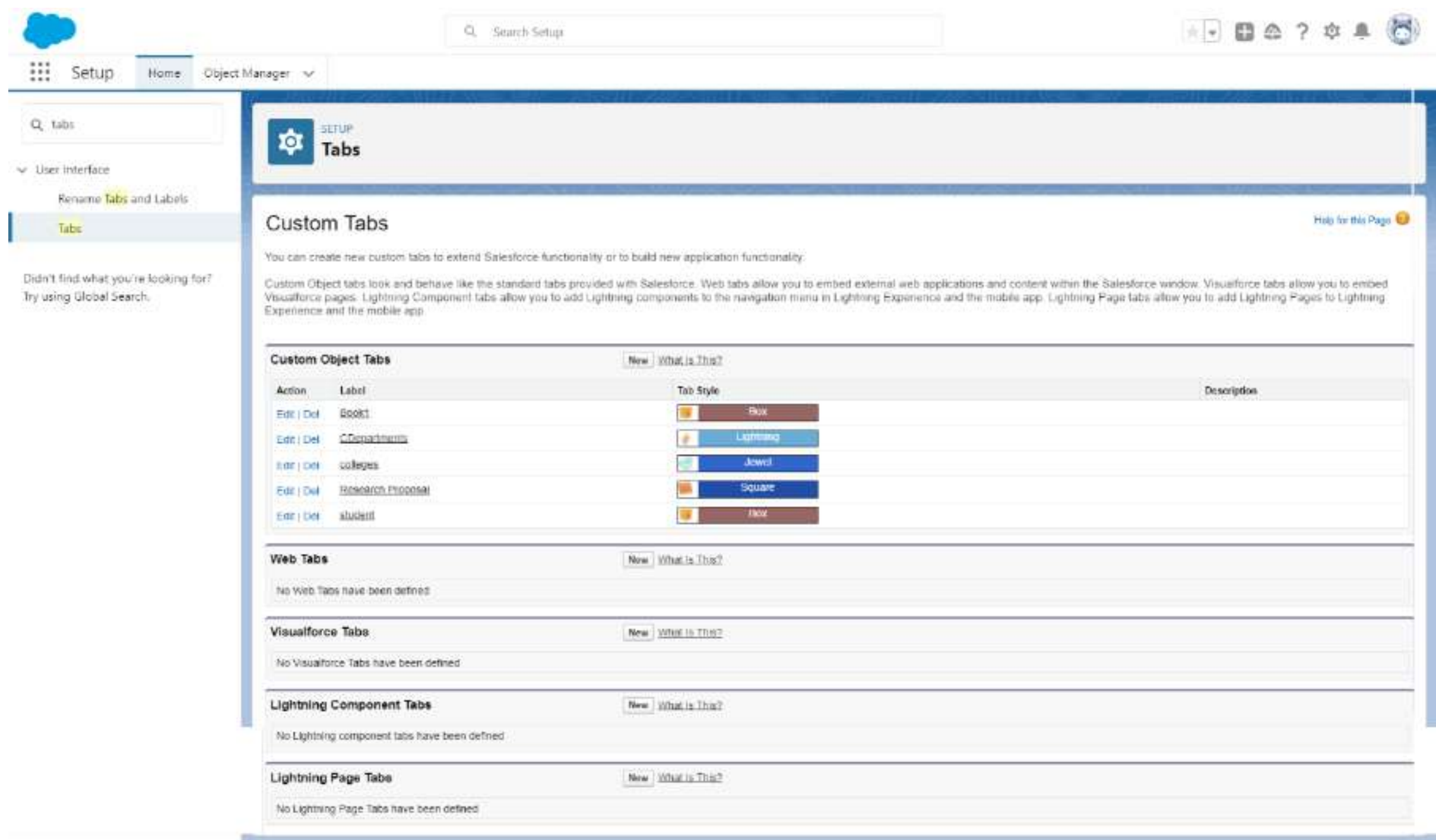
Step 3. Add to Custom Apps

Step 3 of 3

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

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

PreviousSaveCancel

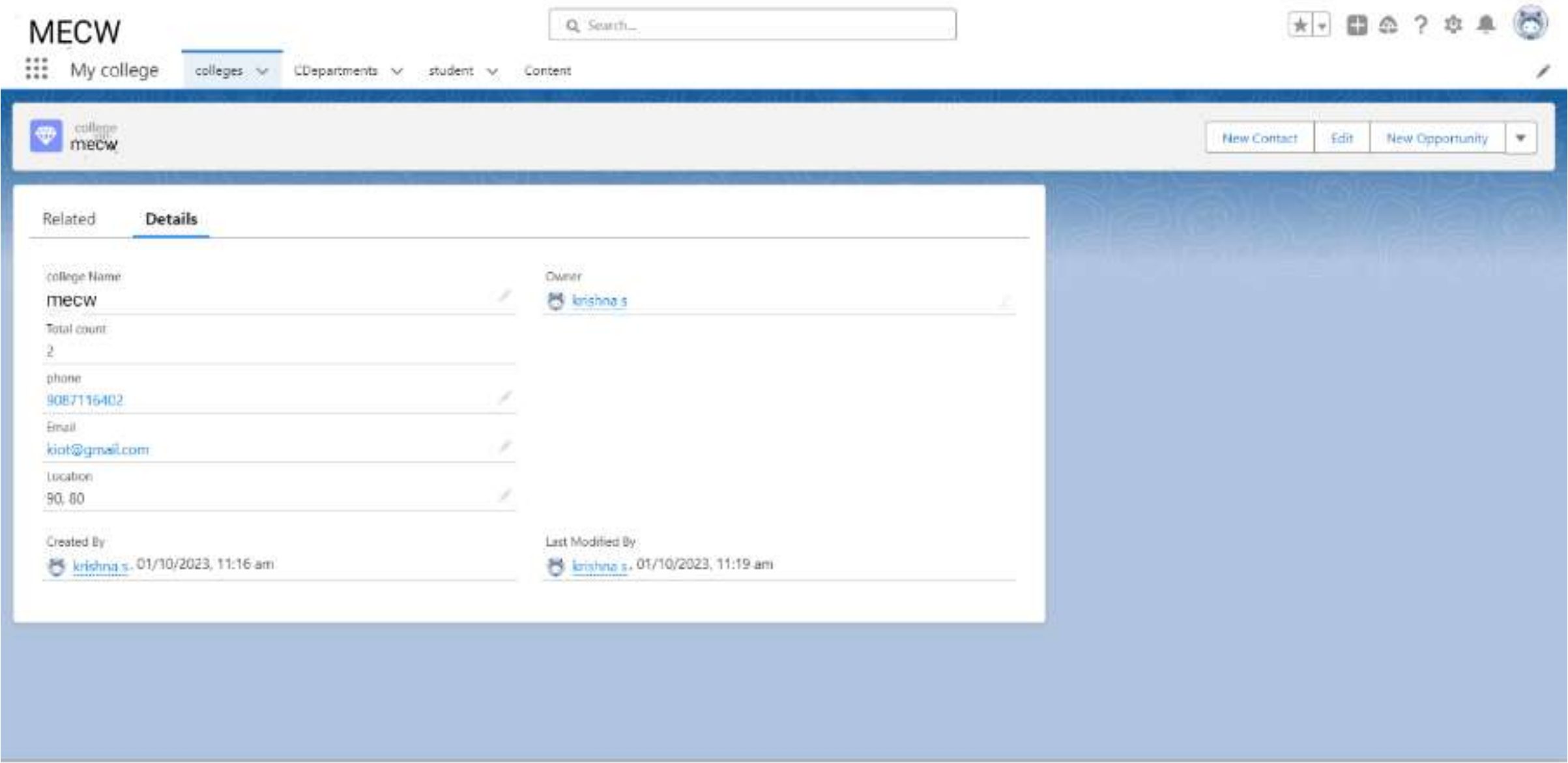


Conclusion:

Now, whenever you create or update a record in the "Department__c" related to a "College__c," the "TotalCount__c" field on the "College__c" will

automatically update to show the total number of related records.

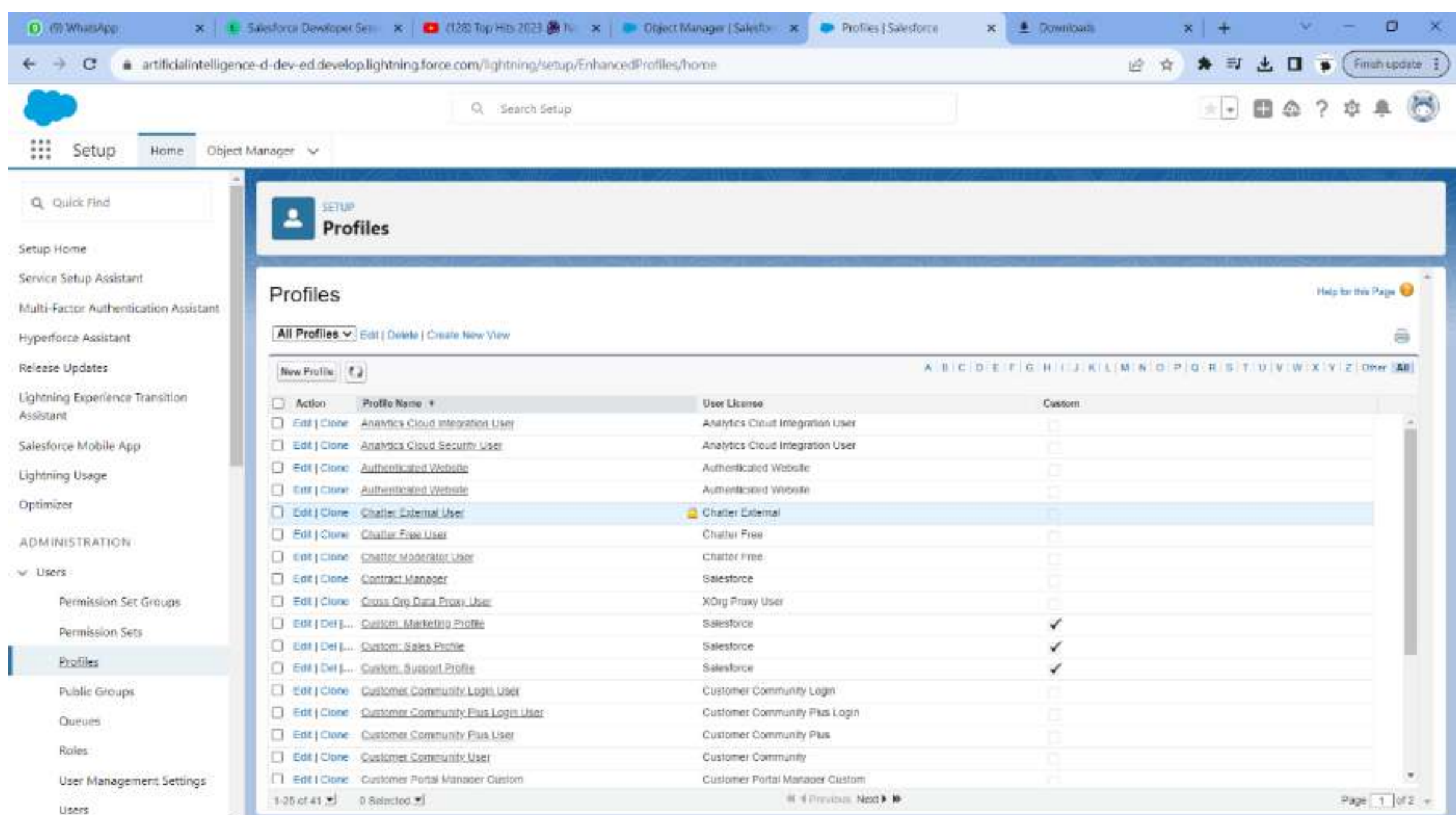
Remember to adjust field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your organization's requirements.



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

Solution:

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



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

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 Edit Delete Create New View

New Profile

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

1-7 of 7 0 Selected

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

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

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

Search Setup

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

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

Search Setup

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

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 \(R\)](#) | [Enabled User Clone Access \(W\)](#) | [Enabled Visualforce Page Access \(R\)](#) | [Enabled External Data Source Access \(R\)](#) | [Enabled Named Credential Access \(W\)](#) | [Enabled External Credential Principal Access \(R\)](#) | [Enabled Custom Metadata Type Access \(R\)](#) | [Enabled Custom Setting Definition Access \(R\)](#) | [Enabled Flow Access \(R\)](#) | [Enabled Service Presence Status Access \(R\)](#) | [Enabled Custom Permissions \(R\)](#)

Profile Detail Edit Clone Delete View Users

Name	Manager	Custom Profile	✓
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

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=%2F00e5j000000W0Bz%2Fe%3FrefURL%3D%252F00e5j0...

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

Manager

Set the permissions and page layouts for this profile

Profile Edit

Name: Manager

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="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"/>
kkot (kkot)	<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
Accounts	<input checked="" type="checkbox"/> Default On	Libraries	<input checked="" type="checkbox"/> Tab Hidden
Alert Settings	<input type="checkbox"/> Default On	Lightroom Bolt Solutions	<input type="checkbox"/> Default On

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000W0Bz%2Fe%3FrefURL%3D%252F00e5j0...

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

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

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

Setup Home Object Manager

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

ADMINISTRATION

Users

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

Users

Data
Email
PLATFORM TOOLS
Apps

Users

User: sowmiya bala

Permission Set Assignments | Permission Set Assignments Activated Recently | Permission Set Groups Assignments | Permission Set License Assignments | Personal Groups | Public Group Memberships | Quota 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

Edit | Sharing | Reset Password | Login | Freeze

Name	sowmiya bala	Role	Salesforce Platform Manager
Alias	sbsla	User License	Manager
Email	2k20cse179@knot.ac.in (Verify)	Profile	Manager
Username	2k21it@knot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User16951677128236452616	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

1 of 5,486

support@salesforce.com <support@salesforce.com> to me 7:13 PM (5 minutes ago)

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!

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

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?](#)

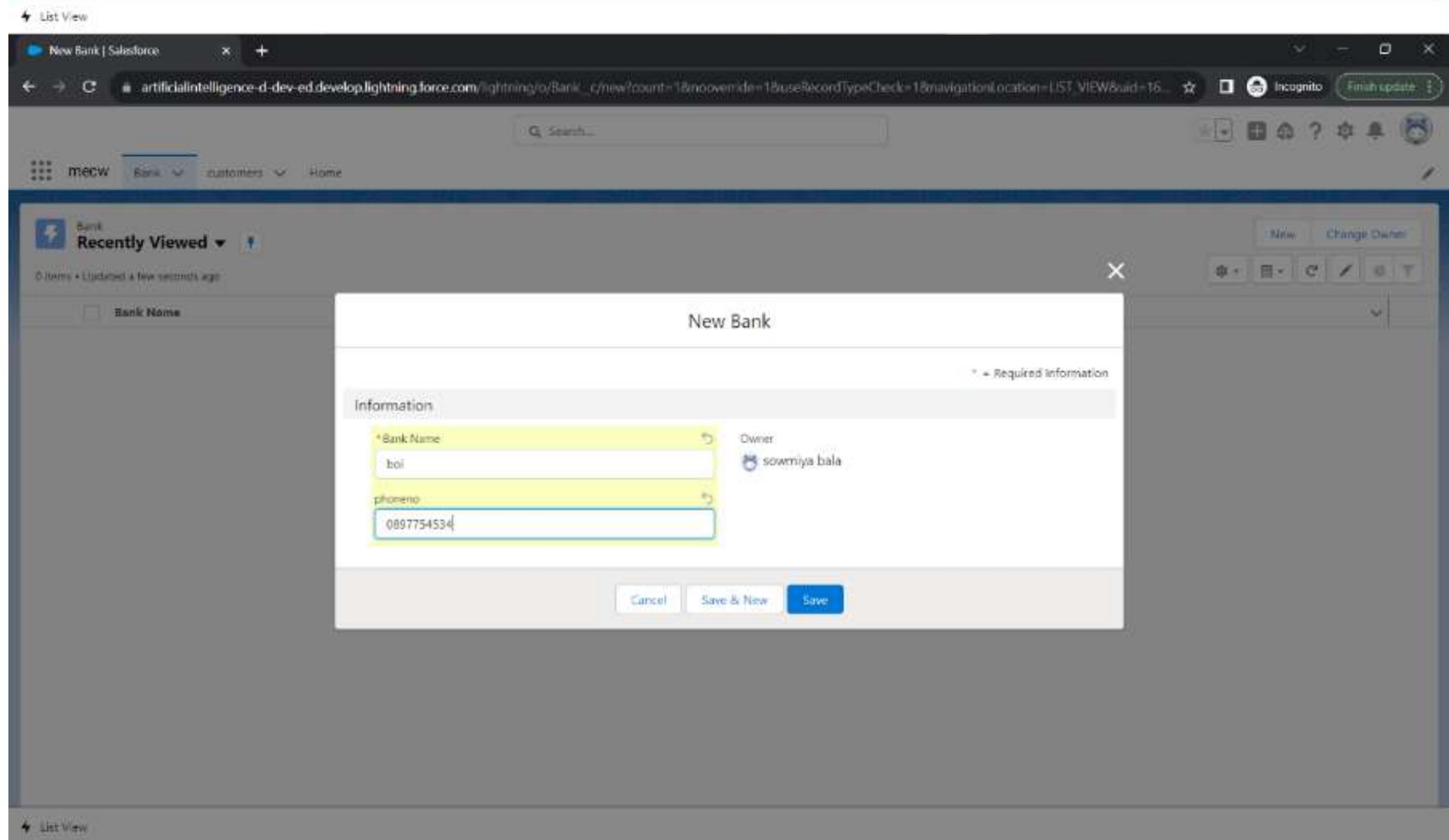
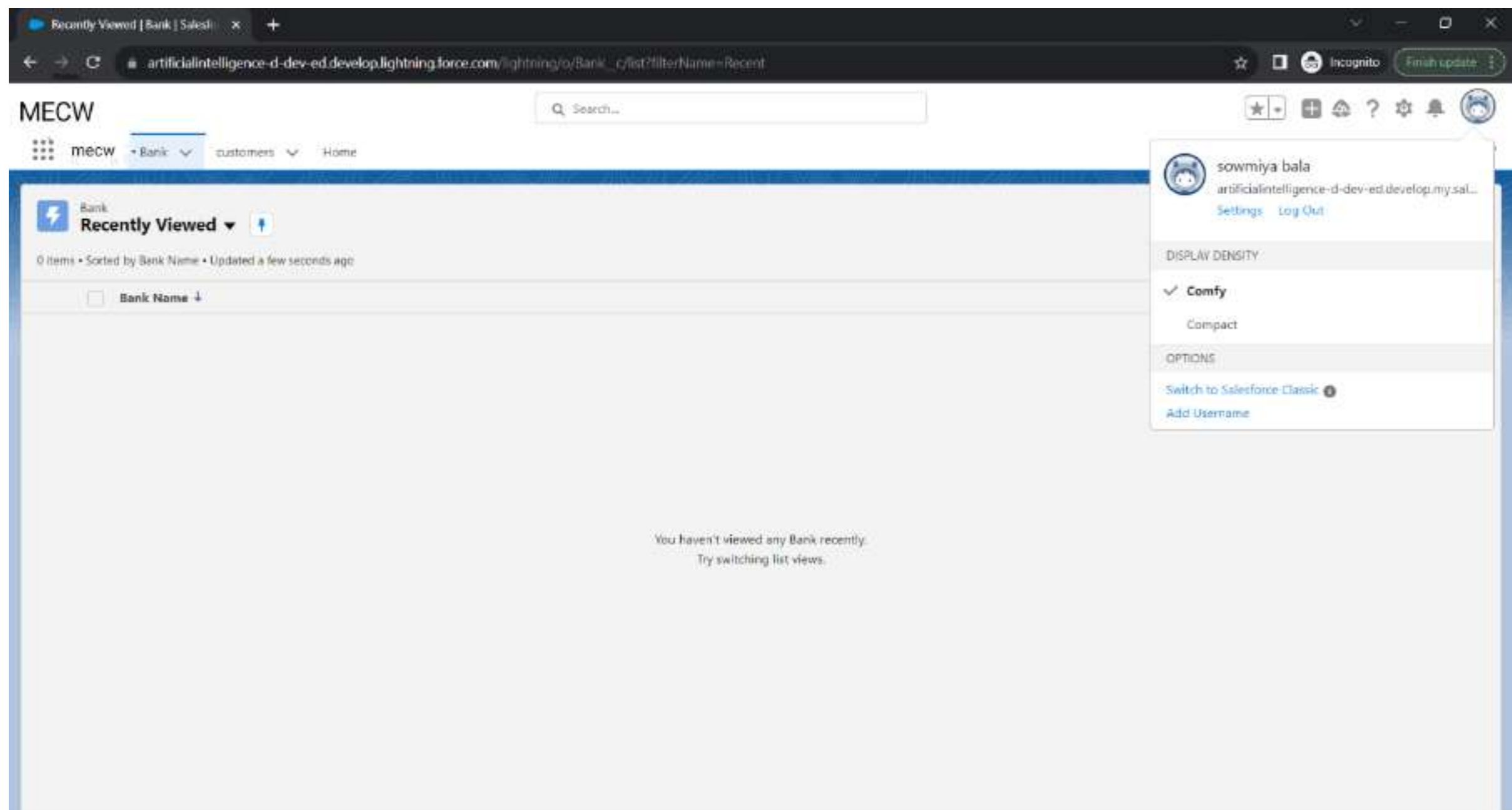
Join us for the future of trusted enterprise AI, streaming on Salesforce+.

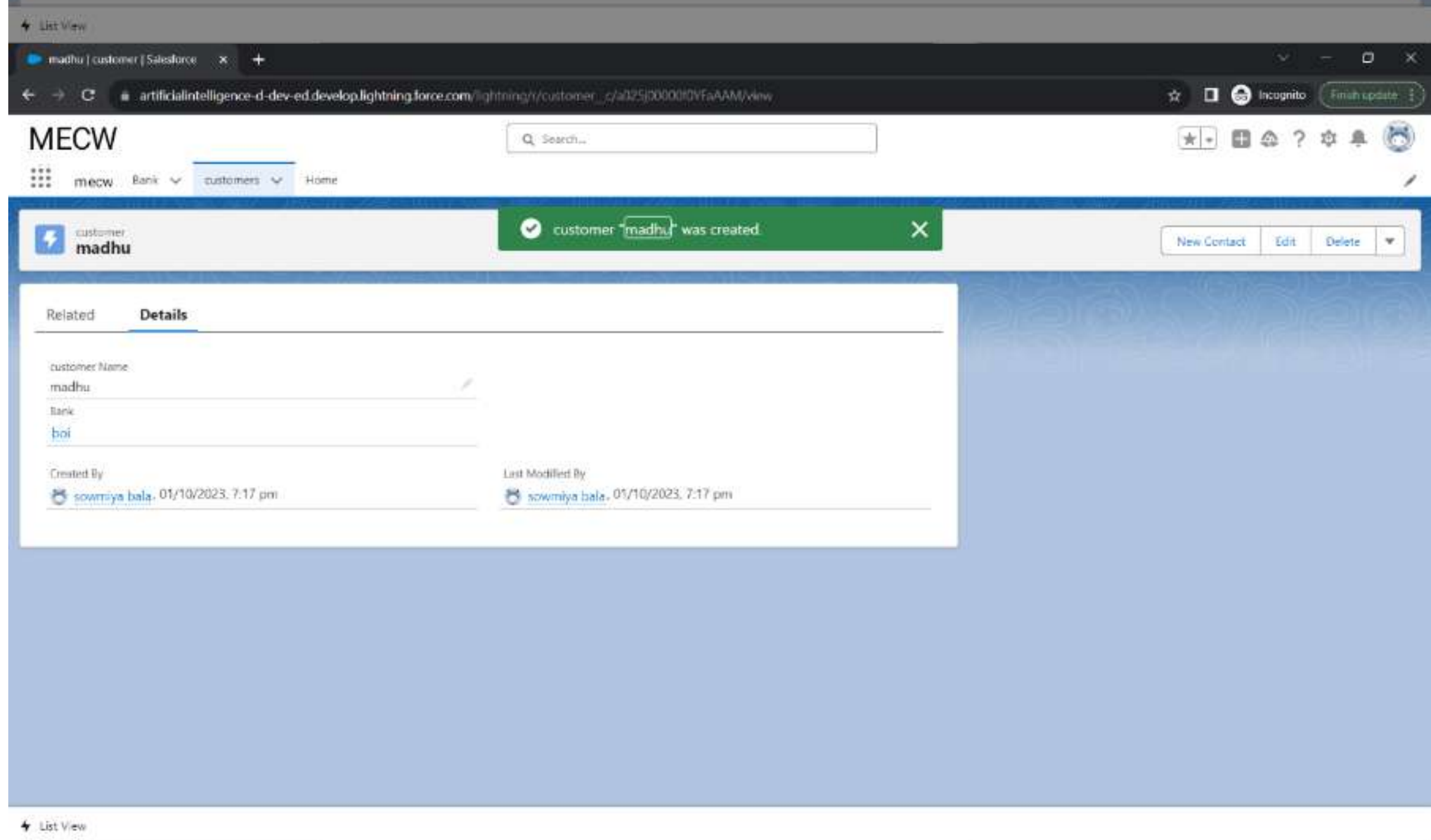
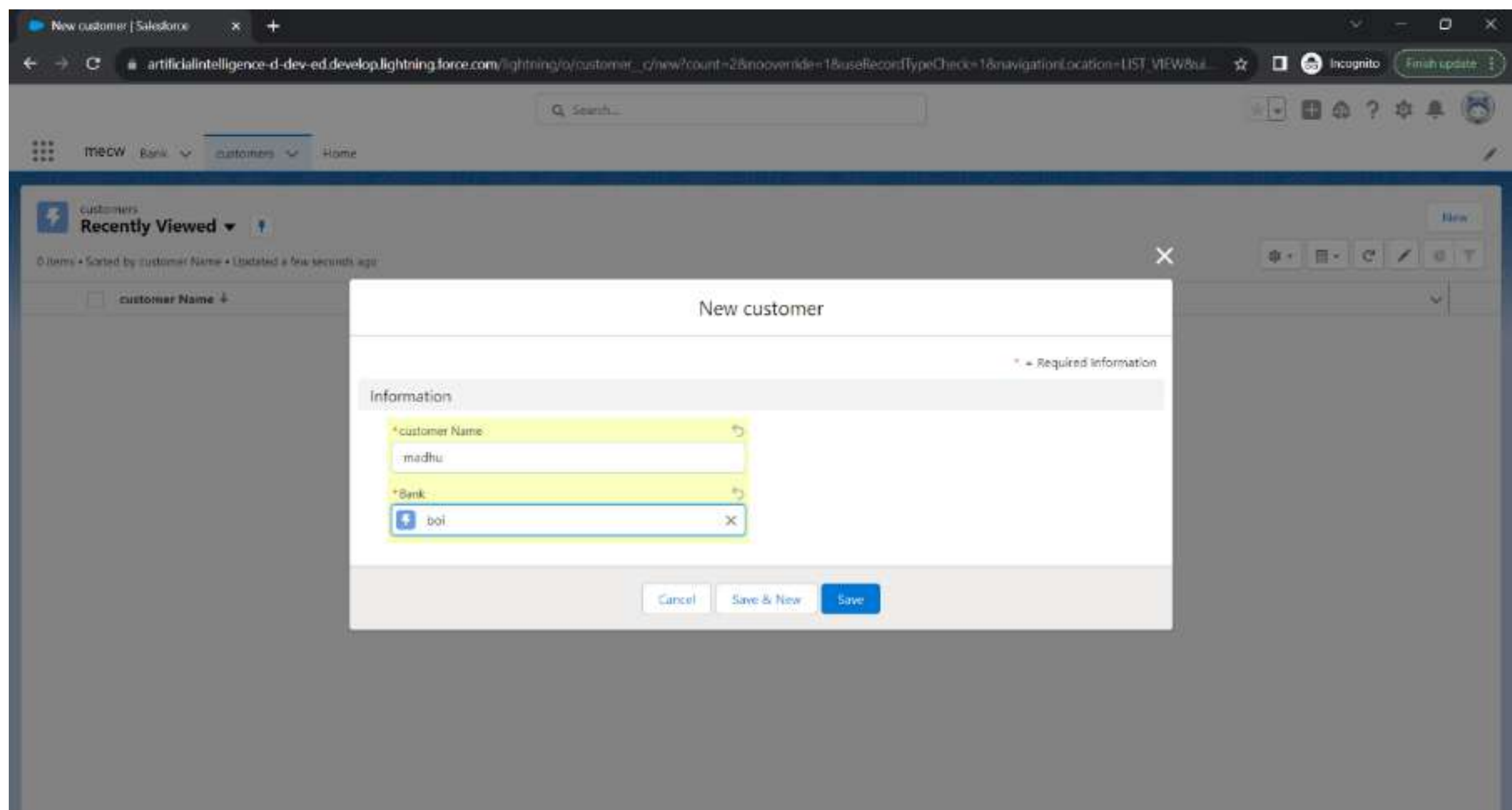
WATCH ON DEMAND



AI Day

© 2023 Salesforce, Inc. All rights reserved.





The screenshot displays the Salesforce Setup interface, specifically the Profiles page. The left sidebar contains navigation links such as 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, and Users. The main content area shows the 'salesmanage' profile details, including its name, user license (Salesforce Platform), custom profile status, and a list of page layouts assigned to it. The page layouts are organized into Standard Object Layouts and Operating Hours. The Standard Object Layouts include Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, and Asset. The Operating Hours include Operating Hours Layout, Order, Order Product, Payment, Payment Authorization, Payment Authorization Adjustment, and Payment Gateway.

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

Search Setup

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

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: ☐

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

Search Setup

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

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 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"/>

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: ☐

Change Your Password | Salesforce

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

Incognito

Finish update

salesforce

Change Your Password

Enter a new password for **Zk20csit@kilotac.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.../list?filterName=Recent

Incognito

Finish update

MECW

Search...

MECW Bank customers Home

Bank

Recently Viewed

0 items • Updated a few seconds ago

New

Bank Name

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

List View

Recently Viewed | customers | x +

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

MECW

Search...

mecw Bank customers Home

customers Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

WhatsApp: x | Salesforce Developer Ser... x | (120 Top Hits 2023) x | Permission Sets | Salesforce x | Welcome to Salesforce V... x | Reset Password | Salesforce x | +

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

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

SETUP

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 Edit Delete Create New View

Action	Permission Set Label +	Description	License
<input type="checkbox"/> New <input type="checkbox"/> 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	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser 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 29 0 Selected

4 Previous Next

Page 1 of 2

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

Step 2:

Permission Sets:

- **Create two permission sets, one for User A and one for User B.**

Object-Level Security:

- **In each profile and permission set, set the object-level security for the Account object to "Read" to ensure that both User A and User B can view Account records.**

Record-Level Security:

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

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

Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

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	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser 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 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

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Permission Sets

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

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Permission Sets

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%3FstdcFrameOrigin%3Dhttps%253A...

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
 - Prospector Users
- Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
- User Interface
 - Action Link Templates
 - Actions & Recommendations
 - App Menu

Permission Set

salesmanager

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	License	API Name	salesmanager
Session Activation Required		Namespace Prefix	
Last Modified By	GDPALE	Created By	GDPALE

Created: 01/10/2023, 7:29 pm

Apps

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

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

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
 - Prospector Users
- Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
- User Interface
 - Action Link Templates
 - Actions & Recommendations
 - App Menu

Permission Set

salesmanager

Find Settings Clone 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 Anonymous Event Source	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 Invoices	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

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

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
 - Prospector Users
- Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
- User Interface
 - Action Link Templates
 - Actions & Recommendations

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.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%2Fe%3F%3DEntityPermissions%26o%3D...

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
 - Prospector Users
- Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
- User Interface
 - Action Link Templates
 - Actions & Recommendations

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/PermSet/0P55j000008Phok/PermissionSetAssignment/home

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
 - Prospector Users
- Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
- User Interface
 - Action Link Templates
 - Actions & Recommendations

App Menu

salesmanager

Current Assignments

No assignments defined.

Add Assignment

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSet/0P55j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
 - Prospector Users
- Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
- User Interface
 - Action Link Templates
 - Actions & Recommendations

App Menu

Select Users to Assign

All Users

1 item selected

Search this list...

	Full Name ↑	All...	Username	Role	Ac...	Profile
<input type="checkbox"/>	Amelia Ellington	ael	amelia.ellington.146kxcp9oodlh.d6cwpdcuo4wh.hnbdamwrtwhq.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_dliya_pas_4w08jybf9wk.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/0P55J00008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

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#eyJjb2twb25lbmREZWYiOiZXR1cF9wbGF0ZmlybV9wZXIic2pwc2F5ZXN1bHRQYWdlbW...

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

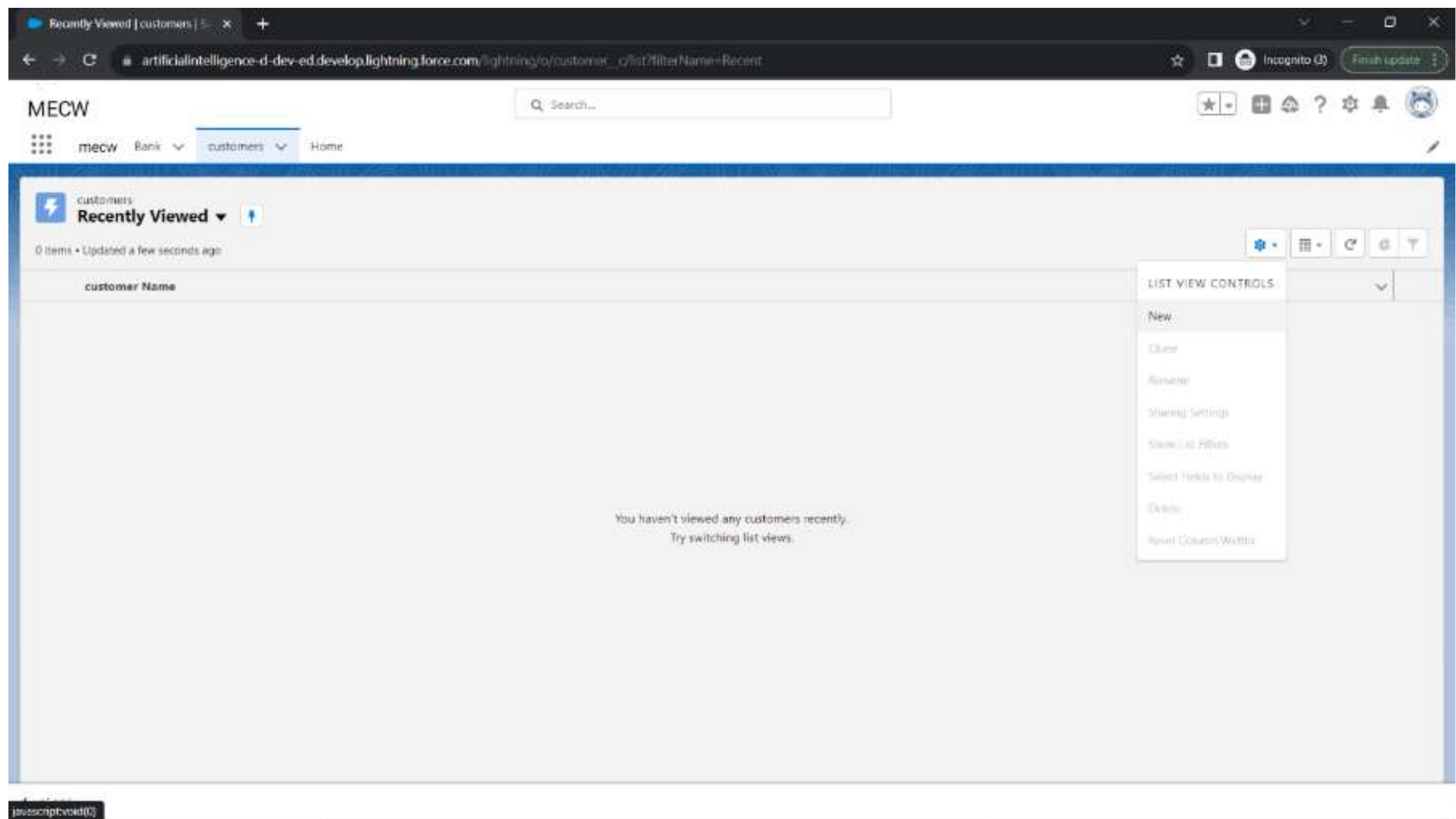
PERMISSION SET SALESMAN

1 assignments were successful

Assignment Summary

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

Done

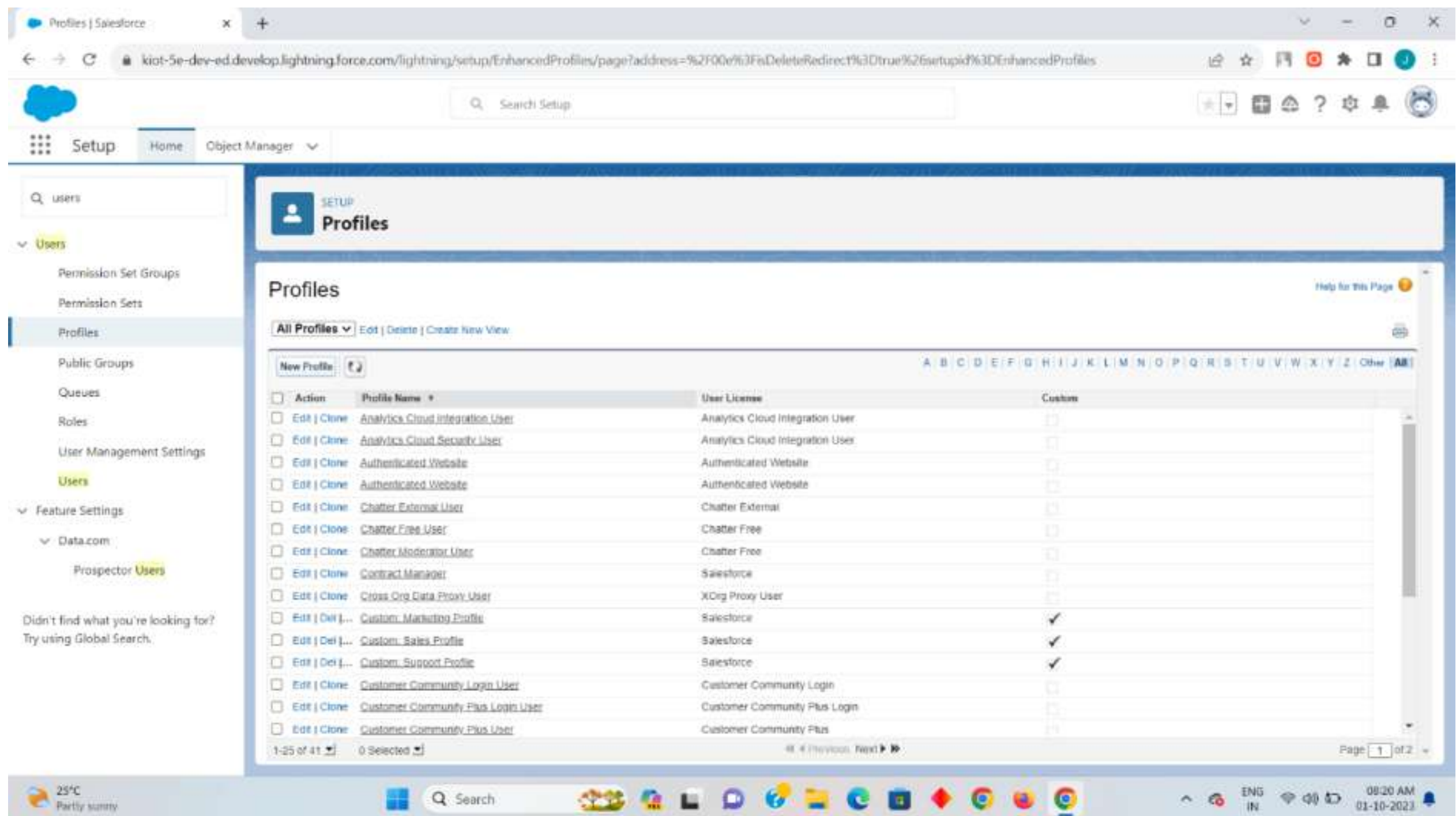


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

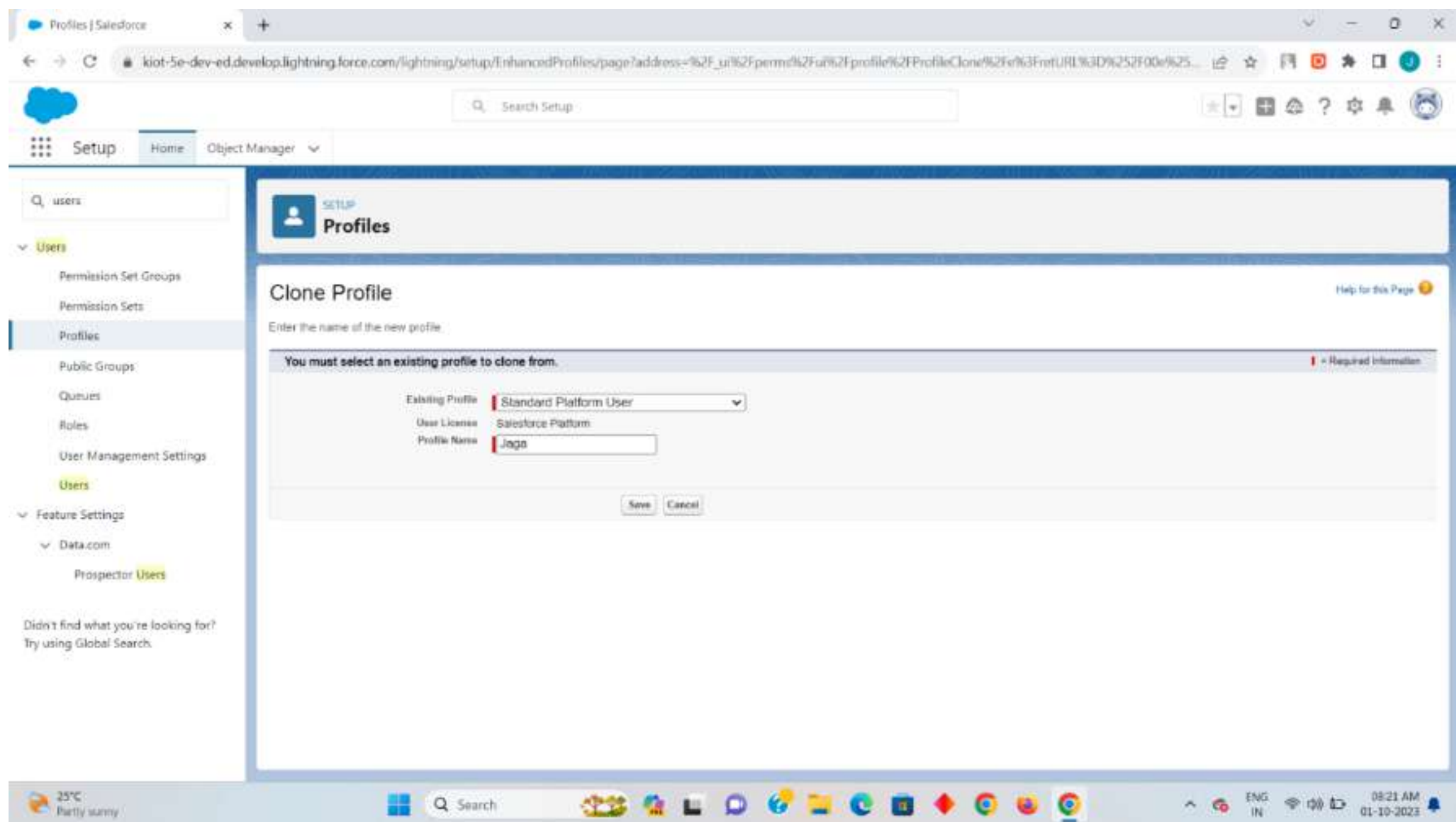
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

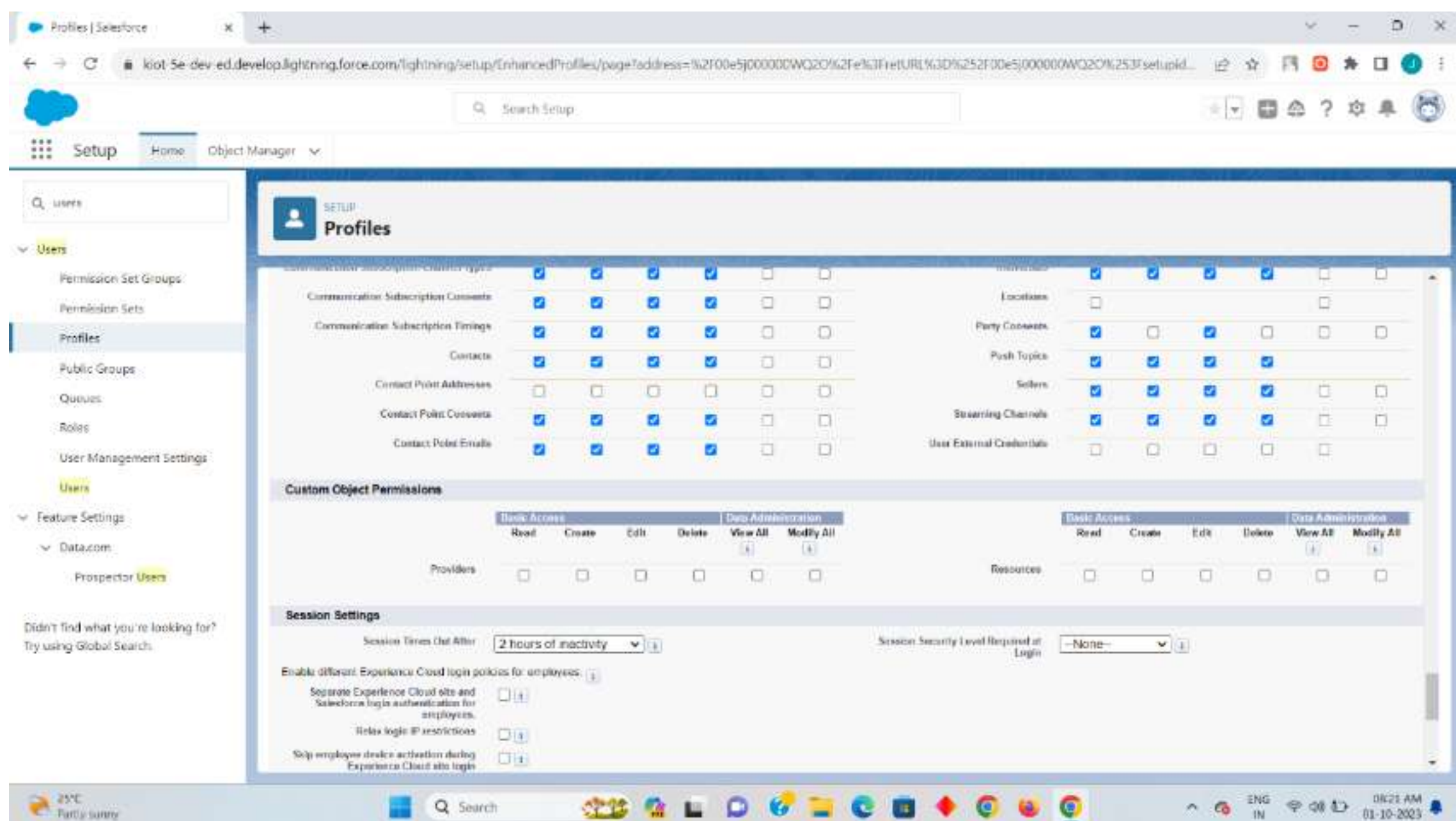
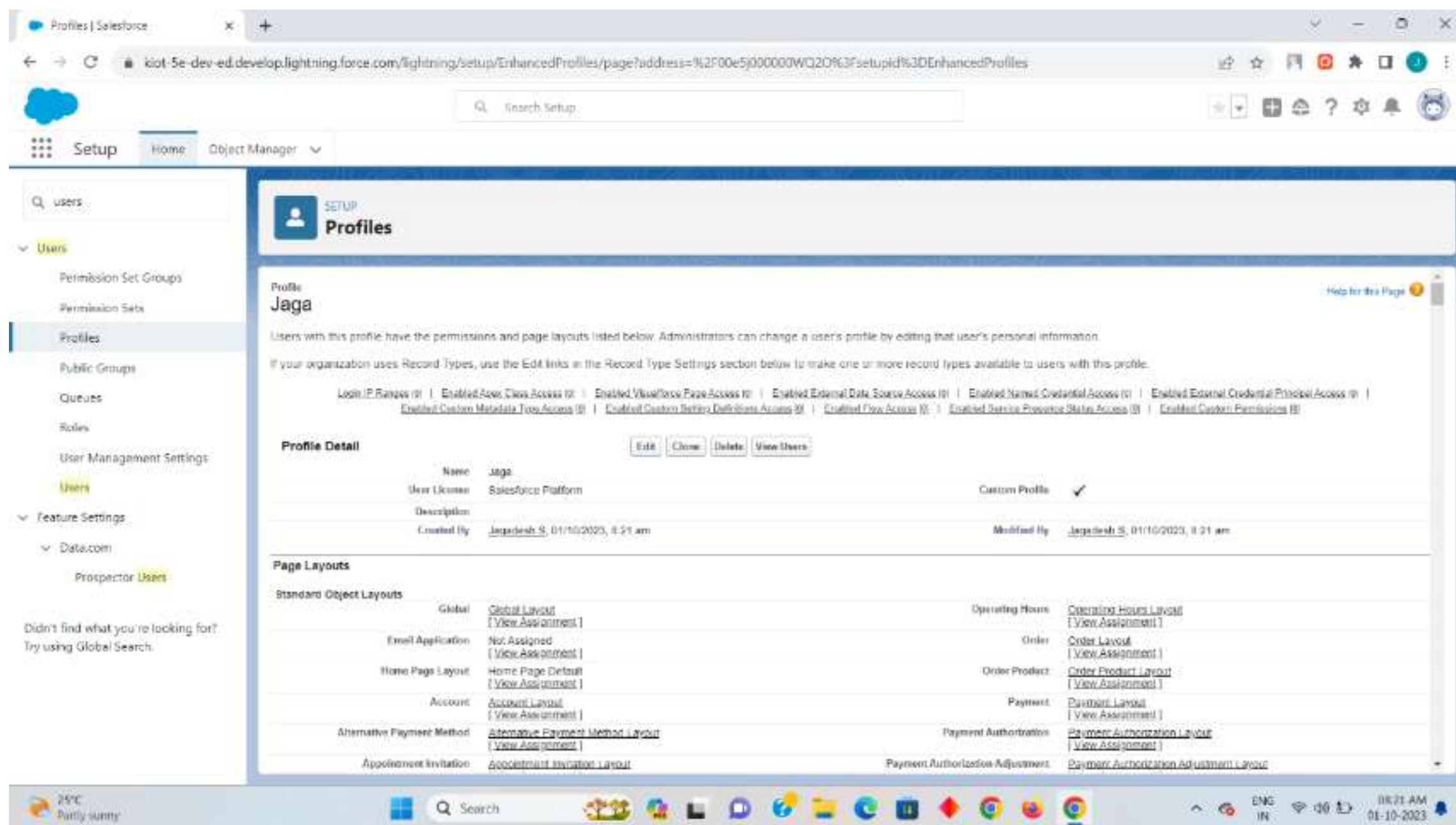
Click on the new to create a new profile along with the label and Api



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.



Profiles | Salesforce

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

Setup Home Object Manager

users

Users

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

Users

Feature Settings

- Data.com
- Prospector Users

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

SETUP Profiles

Administrative and system objects

Administrative and system objects	<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%2Fe%3FretURL%3D%252F00e5j000000WQ2O%253Fsetupid...

Setup Home Object Manager

users

Users

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

Users

Feature Settings

- Data.com
- Prospector Users

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

SETUP Profiles

Profile Edit

Jaga

Set the permissions and page layouts for this profile.

Save Save & New Cancel

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) ☐ ☒

WDC (standard__Work) ☐ ☐

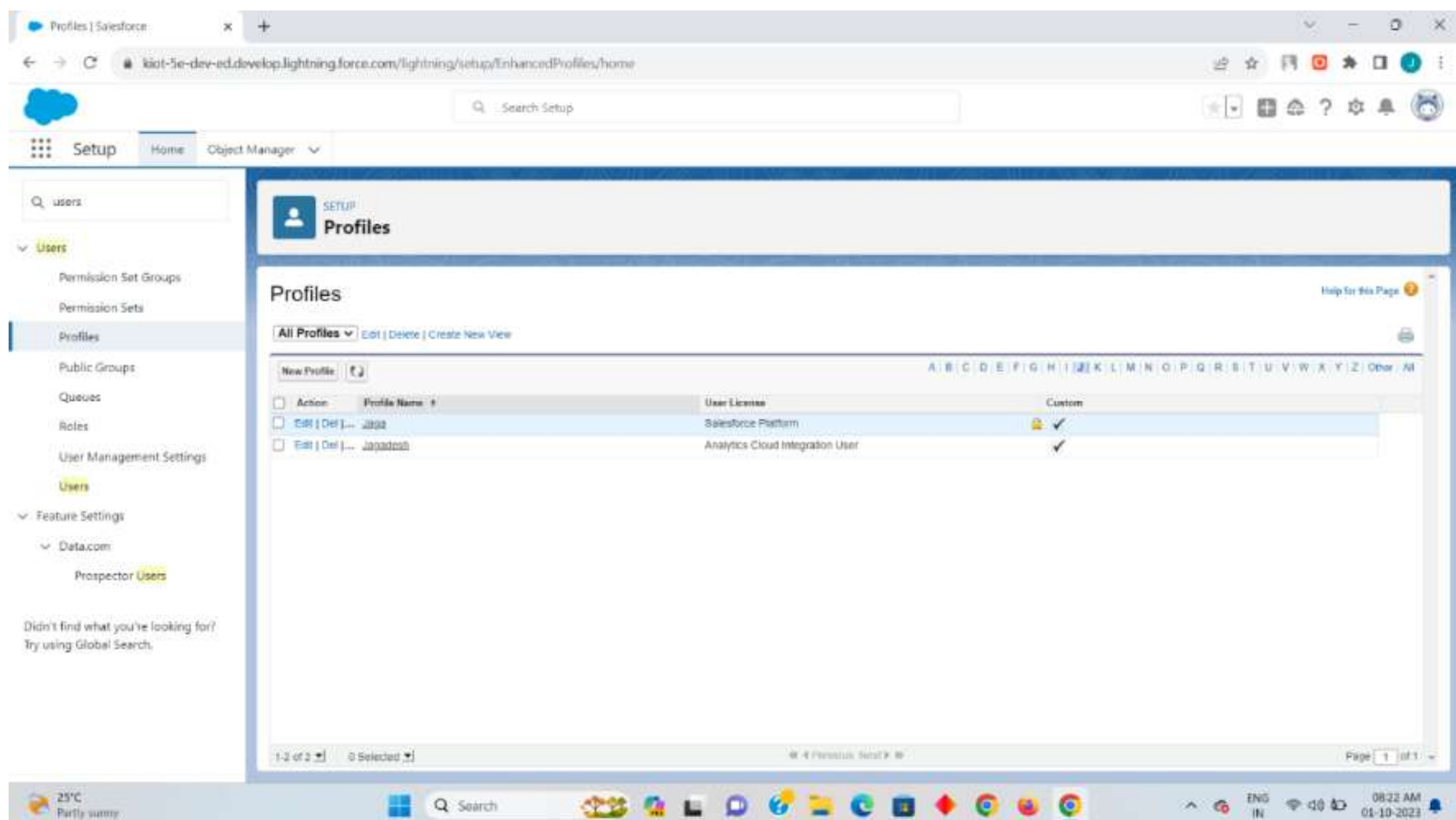
Service Provider Access

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

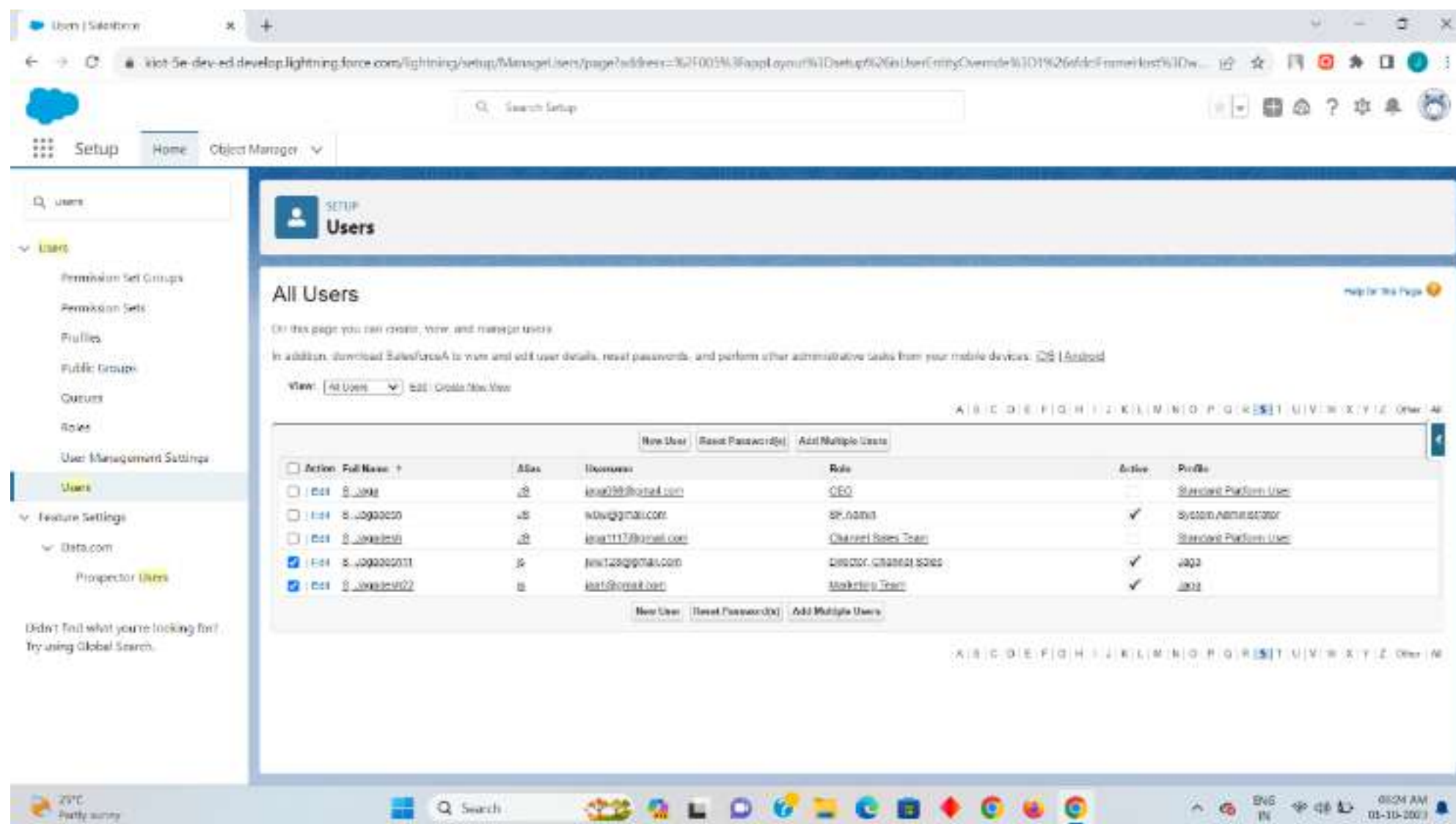


The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area is titled 'Profiles' and displays a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. Two profiles are listed: 'jaga' and 'jagadash'. The 'jaga' profile is selected, and its details are shown in a modal window. The modal window shows the 'jaga' profile with 'Salesforce Platform' license and 'Custom' permissions. The 'jaga' profile is also listed in the table with 'Salesforce Platform' license and 'Custom' permissions. The 'jagadash' profile is listed with 'Analytics Cloud Integration User' license and 'Custom' permissions. 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
<input type="checkbox"/> Edit Del ...	jaga	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	jagadash	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 Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

Step 6:

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

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

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

The screenshot shows the Salesforce 'Permission Sets' setup page. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Profiles', 'Public Groups', 'Quizzes', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area is titled 'Permission Sets' and includes a 'Help for this Page' link. Below the title, there is a section for 'All Permission Sets' with 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 status bar with '145 of 10' and '0 Selected'.

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, que...	Facility Manager
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User

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

25°C Partly sunny

Search

ENG IN

08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSj000008Pgtat%3FsfdcFrameOrigin%3Dhttp%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

25°C Partly sunny

Search

ENG IN

08:24 AM 01-10-2023

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.

Permission Sets

Permission Set: 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	-
Account Reasons	No Access	-	-
Account 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	-

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.

Permission Sets

Permission Set: permission12

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Accounts

Accounts

Edit

Object Permissions

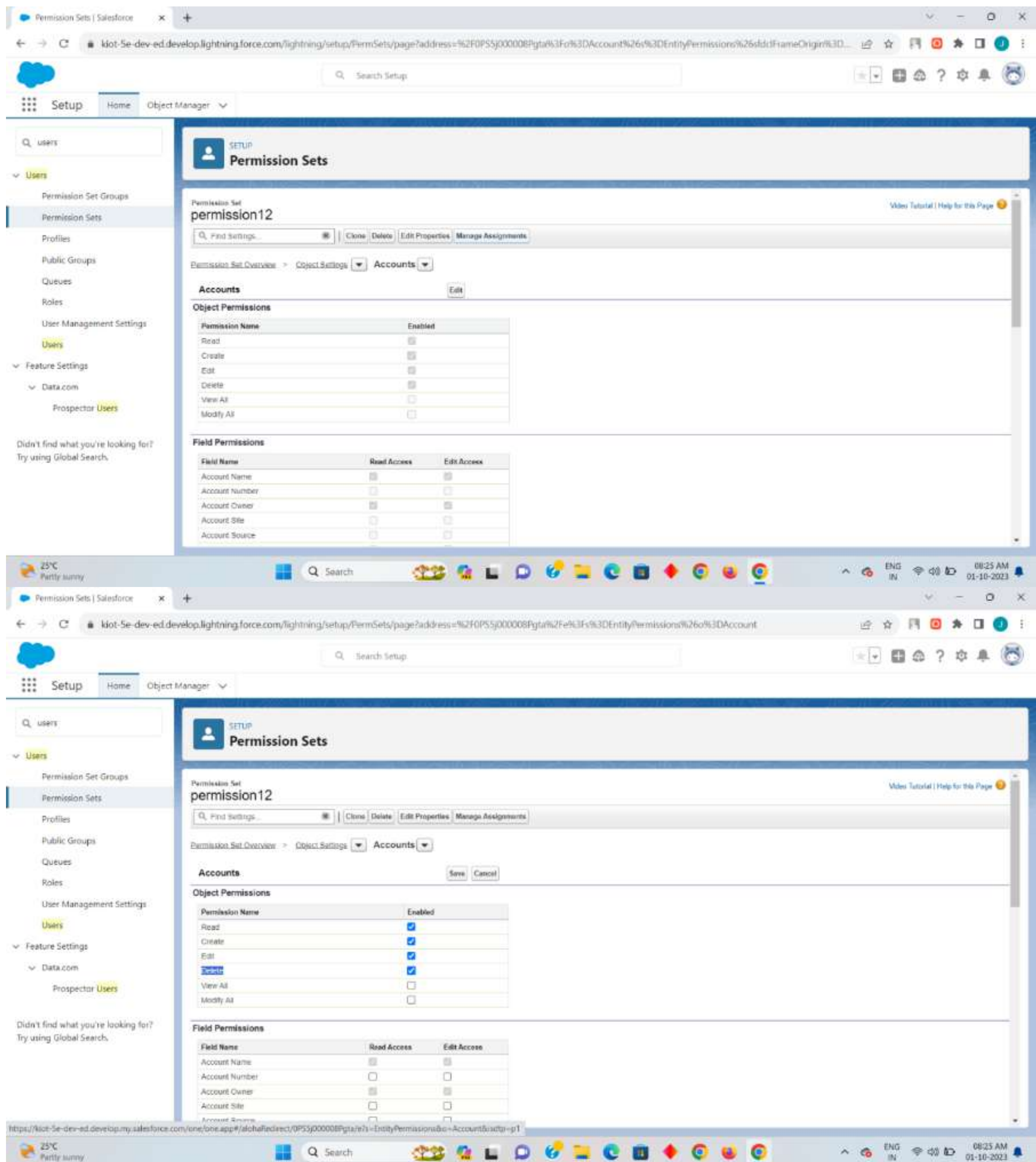
Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

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"/>

Step 7:

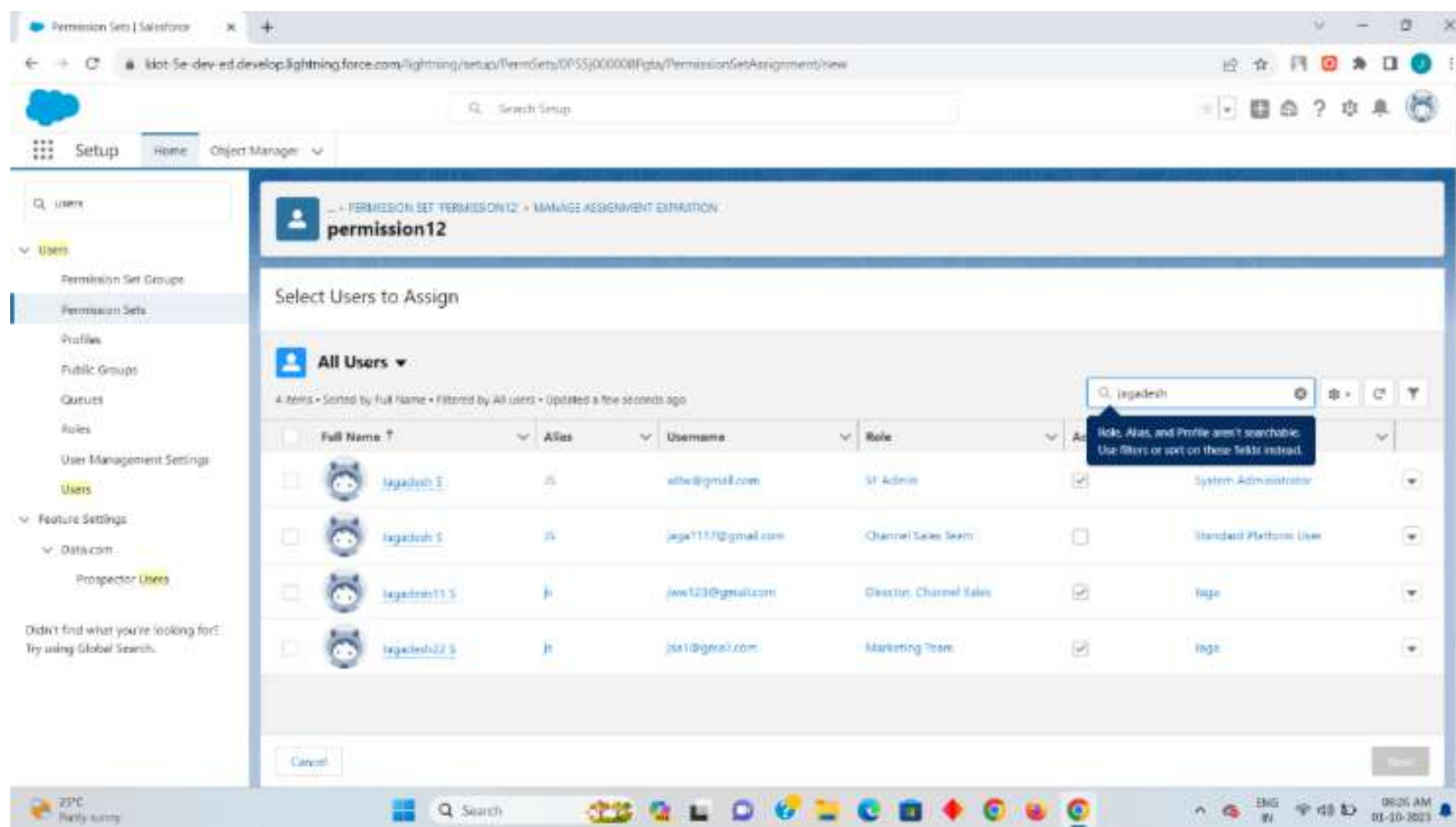
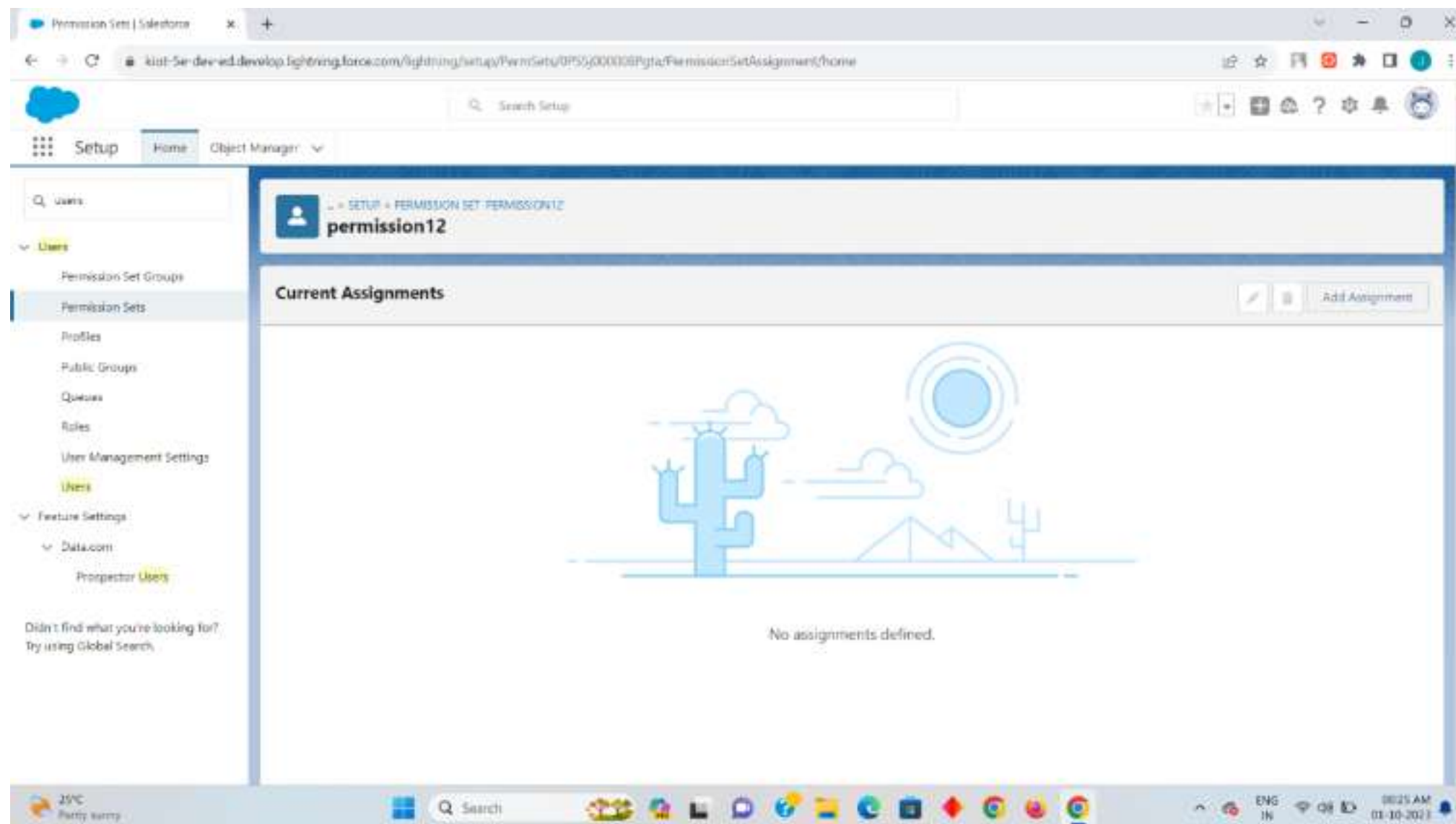
Now to give the specific delete access to the user click on edit on the Account and then enable the read, create, edit and the delete on it so that the permission set will have a specific special access on it. Once it has been done click on save and then click on manage assignment.

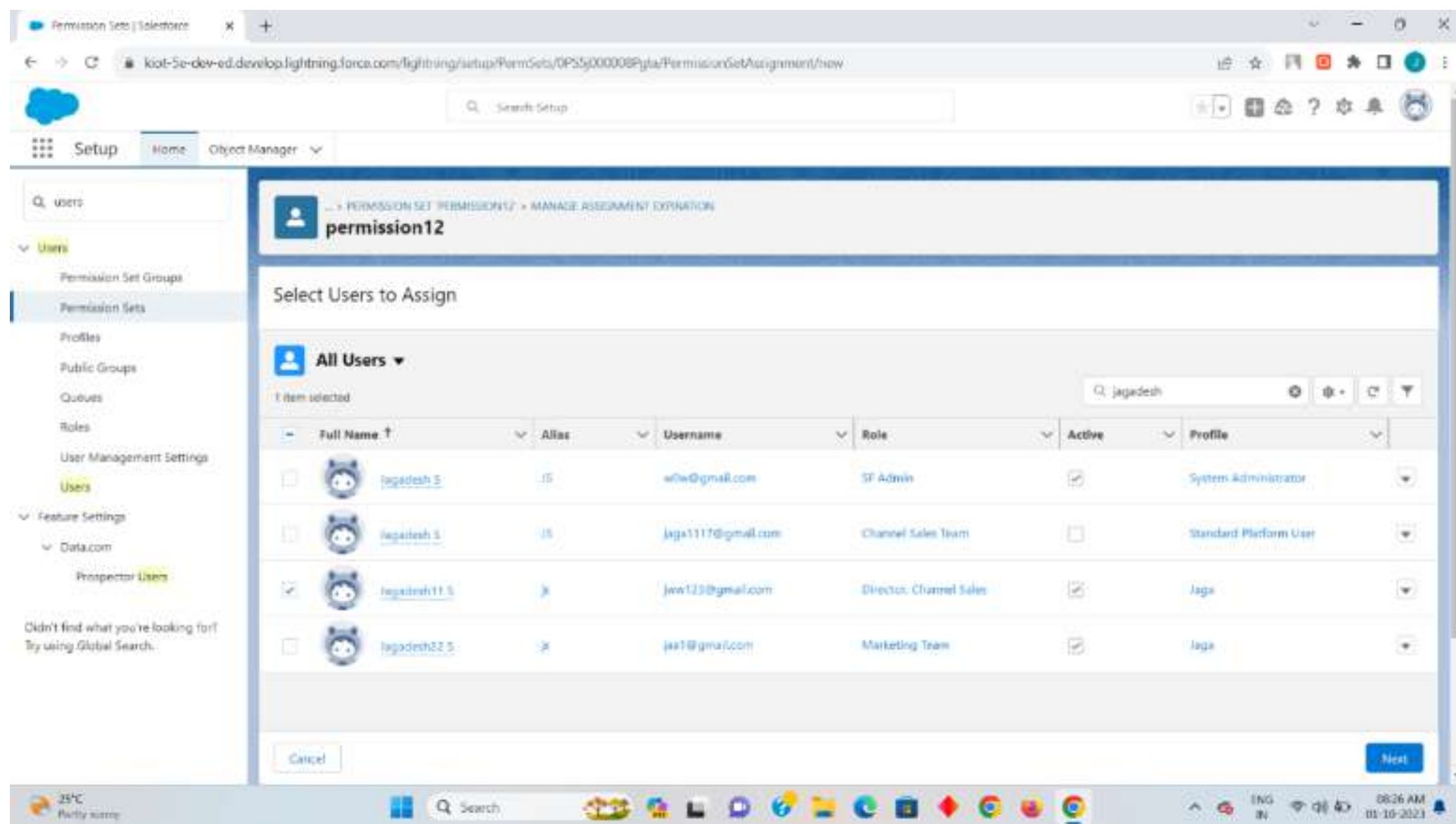


Step 8

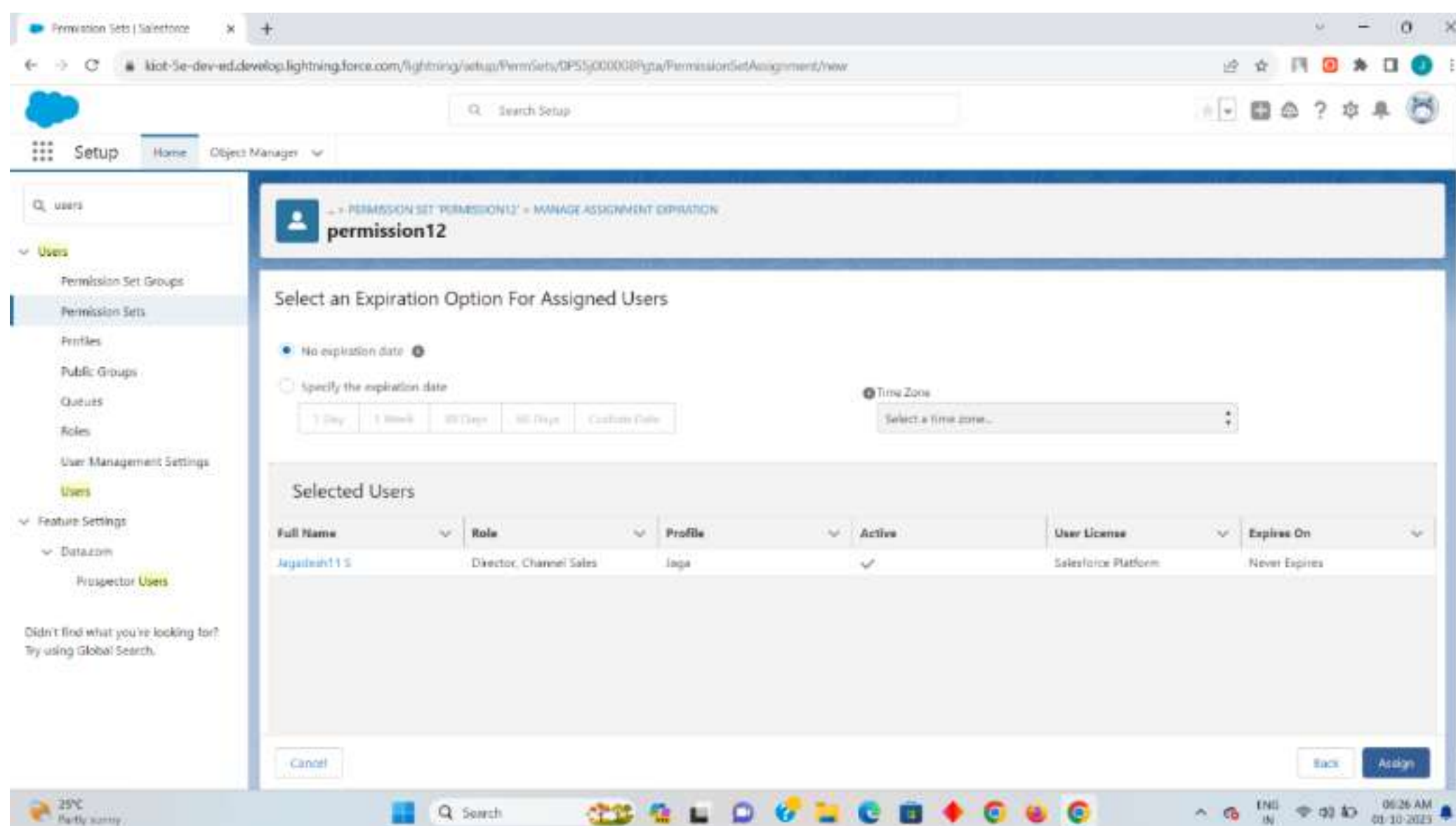
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then

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

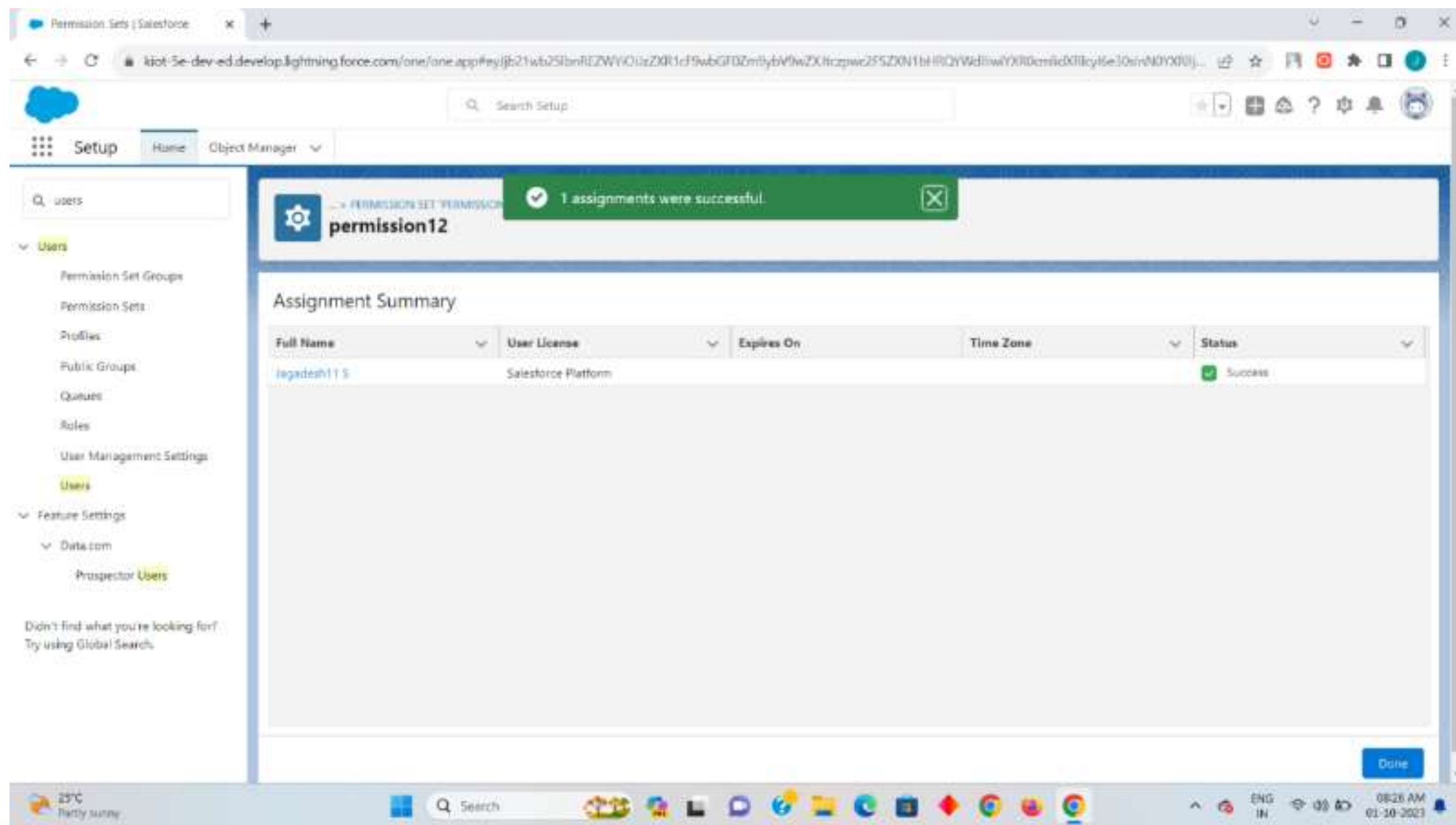




Click ♥ on next.



Now click ♥ on Assign.



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


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

Solution:

Step 1: Create a Custom Object

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

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

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

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

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

5. Create a template like the following screenshot.

The screenshot shows the 'Email Template Builder' interface for a template named 'Thank You Email - Survey'. The interface is divided into several sections:

- Header:** Includes the title 'Email Template: Thank You Email - Survey' and buttons for 'Edit in Builder', 'Edit', and 'Clone'.
- Tabs:** 'Details' and 'Related' tabs are visible, with 'Details' selected.
- Information Section:**
 - Email Template Name:** Thank You Email - Survey
 - Description:** (empty)
 - Made in Email Template Builder:** ☒
 - Related Entity Type:** Survey Result
 - Folder:** Public Email Templates
- Message Content Section:**
 - Subject:** Thank You For Completing Our Survey!
 - Enhanced Letterhead:** (empty)
 - HTML Value:**

Hi {{{Survey_Result__c.Name__c}}},

Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.

Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.

Thanks,
Automation Champion
- Additional Information Section:**
 - Created By:** Rakesh Gupta, 12/21/2020, 4:23 PM
 - Last Modified By:** Rakesh Gupta, 12/21/2020, 4:32 PM

Step 3: Create an Email Alert

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

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

Edit Email Alert 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 ! Survey - Thank You Email

Unique Name ! Survey_Thank_You_Email 1

Object Survey Result

Email Template ! Thank You Email - Survey 🔍

Protected Component ☐

Recipient Type ! Search: User ! for: Find

Recipients

Available Recipients		Selected Recipients
User: Integration User	Add ➡ Remove ⬅	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 ! Current User's email address !

☐ Make this address the default From email address for this object's email alerts. 1

Save Save & New Cancel

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

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

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

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

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

3. Row 2:

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

4. Click Add Row

5. Row 3:

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

6. Click Add Row

7. Row 3:

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

7. Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

* Label

Save Response

* API Name

Save_Response

Description

How Many Records to Create

☒ One
 ☐ Multiple

How to Set the Record Fields

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

Create a Record of This Object

* Object

Survey Result

Set Field Values for the Survey Result

Field	Value
Comment__c	⌵ Comment ✕
Email__c	⌵ Email > Value ✕
Name__c	⌵ {!Name.firstName} {!Name.lastName}
Rating__c	⌵ Rating ✕

+ Add Field

☐ Manually assign variables

Cancel

Done

3. In the Action box, type Survey - Thank You Email.
4. Clicks 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.

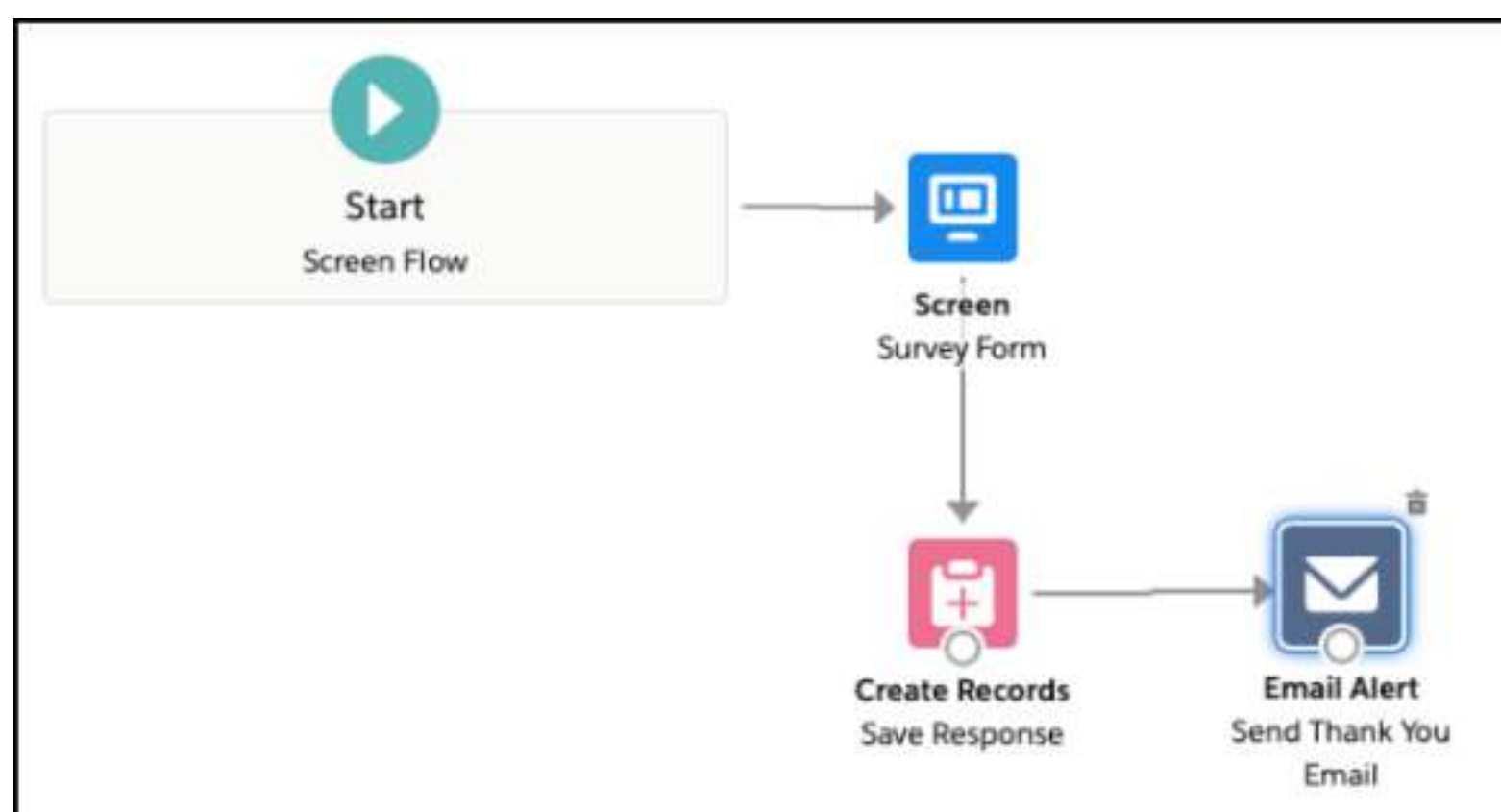
* Label * API Name

Description

Set Input Values

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

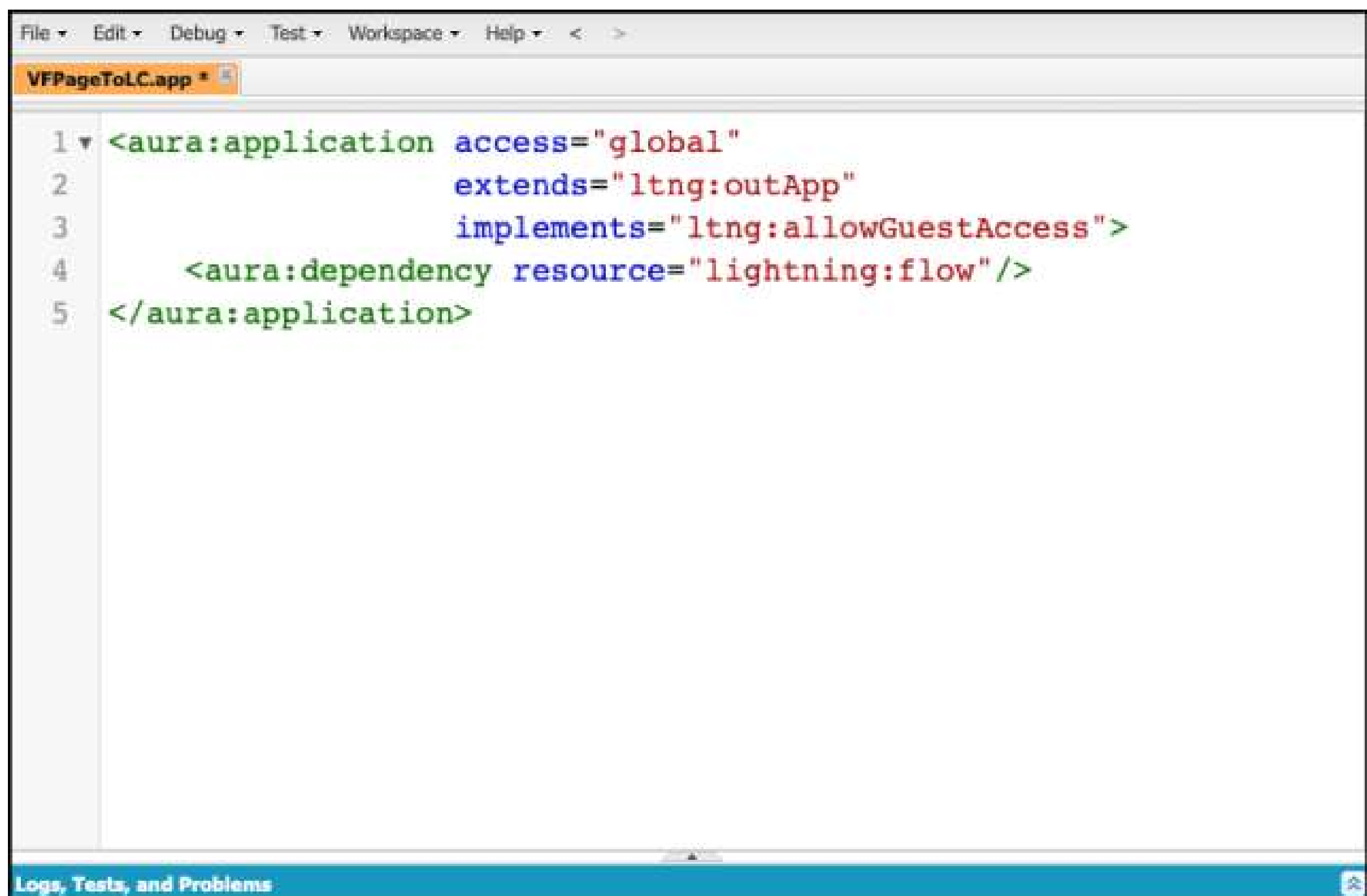
Cancel

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>
```

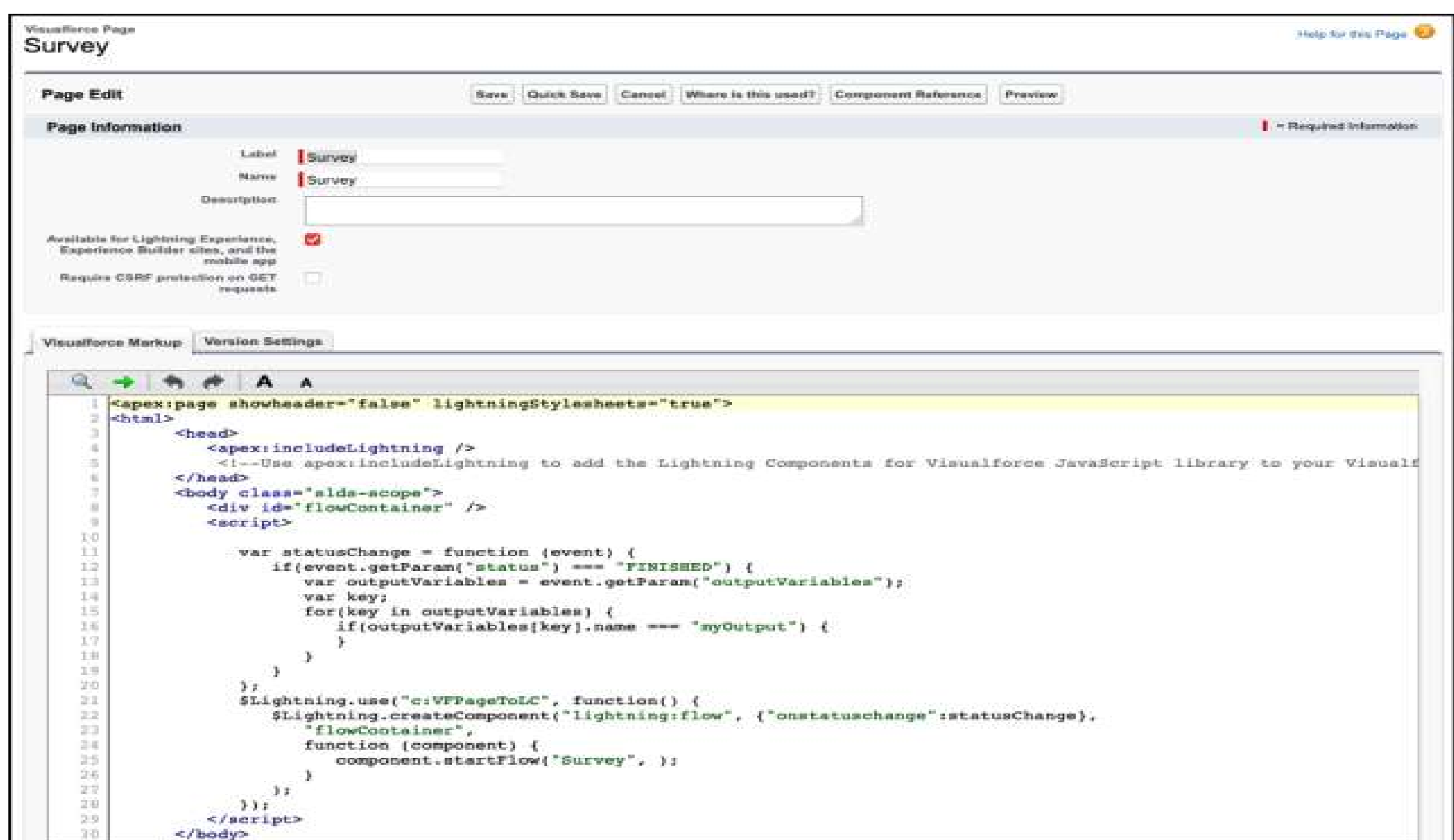
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

Active: ☒ [i]

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

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

Site Template: SiteTemplate [i]

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

Site Favorite Icon: [Text Field] [i]

Analytics Tracking Code: [Text Field] [i]

URL Rewriter Class: [Text Field] [i]

Enable Feeds: ☐

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

Require Secure Connections (HTTPS): ☒ [i]

Lightning Features for Guest Users: ☒ [i]

Upgrade all requests to HTTPS: ☒ [i]

Enable Content Sniffing Protection: ☒ [i]

Enable Browser Cross Site Scripting Protection: ☒ [i]

Referrer URL Protection: ☒ [i]

Guest Access to the Payments API: ☐ [i]

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

Proof of Concept

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

Survey

Name

First Name

Alok

Last Name

Sinfal

*Email

*Rating

5

*Comment

Awesome Blog

Next

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

