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Salesforce
Developer(Course)
Assignment no 1

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Year & Dep : 4th year & CSE
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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 to 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. [Tail me now!](#) [Don't show this message again](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

1 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

Context Name

Enter Record Name Label and Format

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

Record Name 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 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. [Tailor the menu!](#) [Don't show this message again](#)".

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

- Custom Object Information:** This section includes fields for "Label" (set to "department", example: "Account"), "Plural Label" (set to "departments", example: "Accounts"), and "Object Name" (set to "department", example: "Account"). There is also a "Description" text area and a "Context-Sensitive Help Setting" dropdown (set to "Open the standard Salesforce.com Help & Training window").
- Enter Record Name Label and Format:** This section includes a "Record Name" field (set to "Department Name", example: "Account Name") and a "Data Type" dropdown (set to "Text").
- Optional Features:** This section includes checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing".
- Object Classification:** This section includes a note about object classification and checkboxes for "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access".
- Deployment Status:** This section includes checkboxes for "In Development" and "Deployed".
- Search Status:** This section includes a checkbox for "Allow Search".
- Object Creation Options (Available only when custom object is first created):** This section includes 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 of the form are buttons for "Save", "Save & New", and "Cancel".

Step 2: Create a Master-Detail Relationship

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

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

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

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Object Manager

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CDepartment

Details

Fields & Relationships

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Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name

CDepartment__c

Custom

✓

Singular Label

CDepartment

Plural Label

CDepartments

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Setup

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CDepartment

New Relationship

Step 3 of 6

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

Field Label

college

Field Name

college

Description

Help Text

Child Relationship Name

CDepartments

Sharing Setting

Read Only

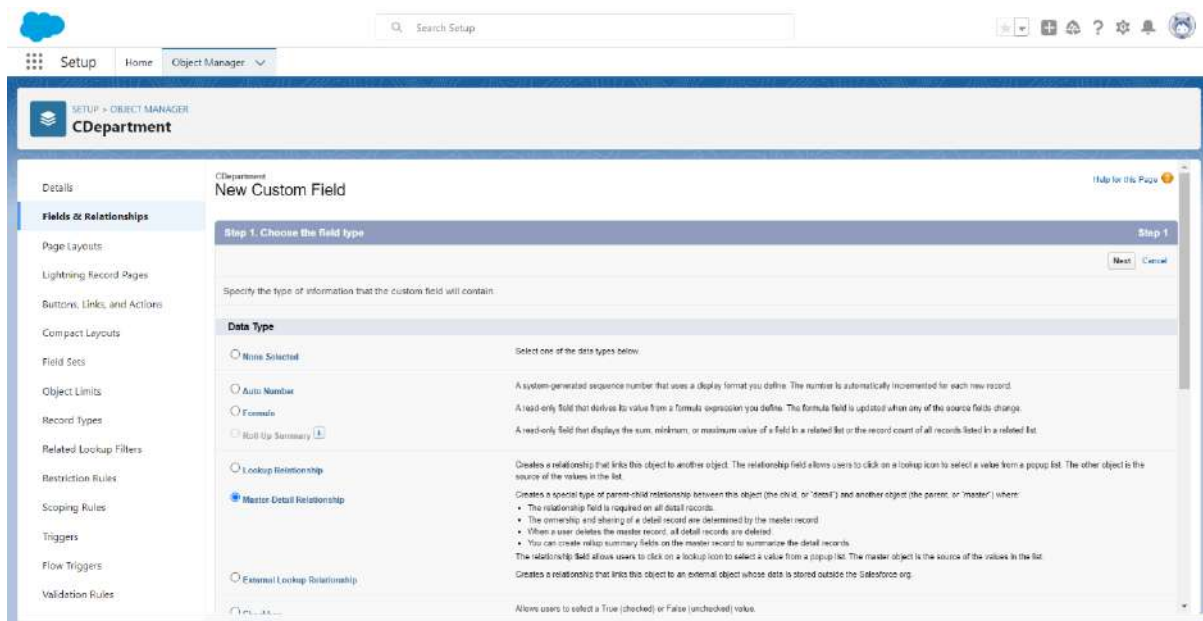
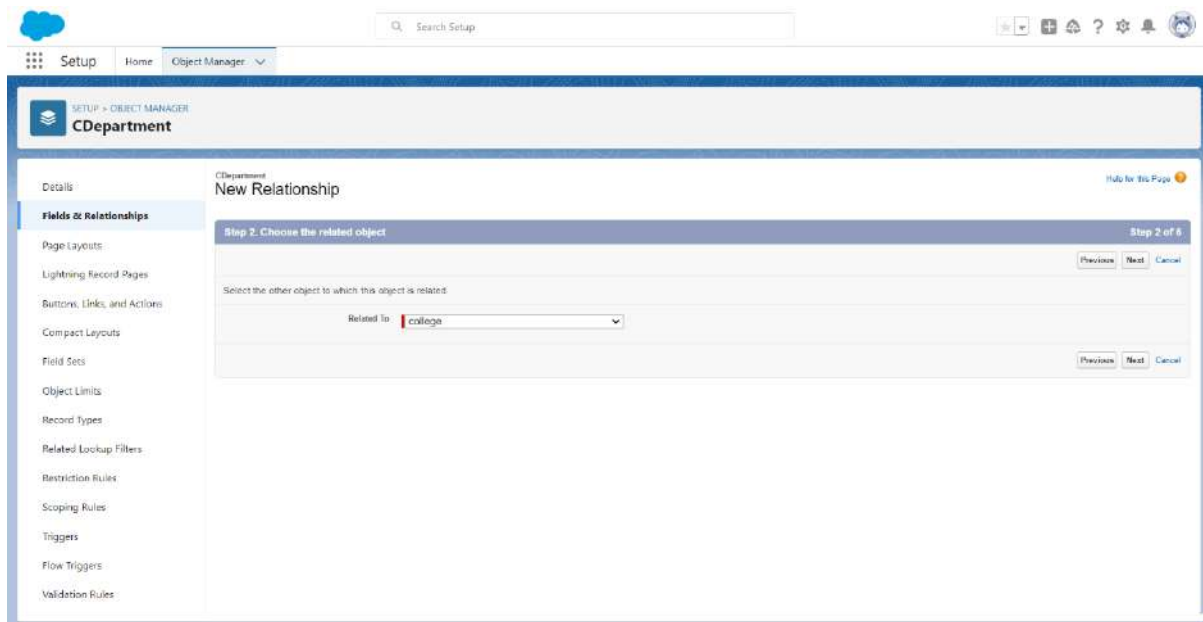
Read Write

Allow reparenting

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

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

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

4 Items, Sorted by Field Label

Q, 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)		

Fields & Relationships

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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	Books	Books	
Edit Del	Research Proposal	Square	
Edit Del	Student	Box	

Web Tabs

New

What Is This?

No Web Tabs have been defined

Visualforce Tabs

New

What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New

What Is This?

No Lightning component tabs have been defined

Lightning Page Tabs

New

What Is This?

No Lightning Page Tabs have been defined

cloud

college

SetupHomeObject Manager

college

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New Custom Field

Help for this Page

Step 6 of 6

Step 6. Add to page layouts

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 first 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.

PreviousSave & NewSaveCancel

cloud

college

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college

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New Custom Field

Help for this Page

Step 4 of 6

Step 4. Establish field-level security

Field Label: Total count

Data Type: Roll-Up Summary

Field Name: Total_count

Description:

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

Field-Level Security for Profile	<input type="checkbox"/> 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"/>
Finance.com - Asset Submission User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

college

colle

SetupHomeObject Manager

college

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college

New Custom Field

Help for this Page

Step 3. Define the summary calculation

Step 3 of 5

PreviousNextCancel

Select Object to Summarize

Required Information

Master Object: college

Summarized Object: CDepartments

Select Roll-Up Type

COUNT

SUM

MIN

MAX

Field to Aggregate: Name

Filter Criteria

All records should be included in the calculation

Only records meeting certain criteria should be included in the calculation

PreviousNextCancel

college

colle

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college

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 5

PreviousNextCancel

Field Label: Total count

Field Name: Total_count

Description

Help Text

Auto add to custom report type: Add this field to existing custom report types that contain this entity

PreviousNextCancel

college SETUP > OBJECT MANAGER

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New Custom Field

Step 1. Choose the field type

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

Data Type

☐ None Selected Select one of the data types below.

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

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

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

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

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

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

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

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

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

college SETUP > OBJECT MANAGER

Details

Fields & Relationships

4 Items, Sorted by Field Label

Q, Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Step 4: Create a Lightning App

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

Developer Name, Description).

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



Setup

Home

Object Manager

Search Setup



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 Kiosk 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 User	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](#)

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

SETUP

Tabs

Help for this Page

New Custom Object Tab

Step 1. Enter the Details

Step 1 of 3

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

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

Object:

collage

Tab Style:

new

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

Splash Page Custom Link:

None

Enter a short description

Description:

Next Cancel

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

SETUP

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Help for this Page

Step 3. Add to Custom Apps

Step 3 of 3

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

Custom App	<input checked="" type="checkbox"/> 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__SalesforceOIS)	<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 user's existing personal customizations	

Previous Save Cancel

Setup

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Setup

Home

Object Manager

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

SETUP

Tabs

Help for this Page

New Custom Object Tab

Step 1. Enter the Details

Step 1 of 3

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

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

Object: CDepartment

Tab Style: Lightning

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

Splash Page Custom Link: --None--

Enter a short description.

Description:

Next Cancel

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Object Manager

Q app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Packaging

Installed Packages

SETUP

Lightning Experience App Manager

New Lightning App

New Connected App

20 items • Sorted by App Name • Filtered by All app namespaces - Tab Set Type

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Custom Tabs






Help for this Page

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Custom Object Tabs

New | What Is This?

Action	Label	Tab Style	Description
Edit Del	Book1	 Box	
Edit Del	Departments	 Lightning	
Edit Del	challenges	 Jewel	
Edit Del	Richardson,Proccosh	 Square	
Edit Del	student	 Box	

Web Tabs

New | What Is This?

No Web Tabs have been defined

Visualforce Tabs

New | What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New | What Is This?

No Lightning component tabs have been defined

Lightning Page Tabs

New | What Is This?

No Lightning Page Tabs have been defined

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.

MECW

My college colleges CDepartments student Content

Search...



college
mecw

New Contact Edit New Opportunity

Related

Details

college Name

mecw

Owner

krishna.s

Total count

2

phone

9087116402

Email

kkot@gmail.com

Location

90, 80

Created By

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

Last Modified By

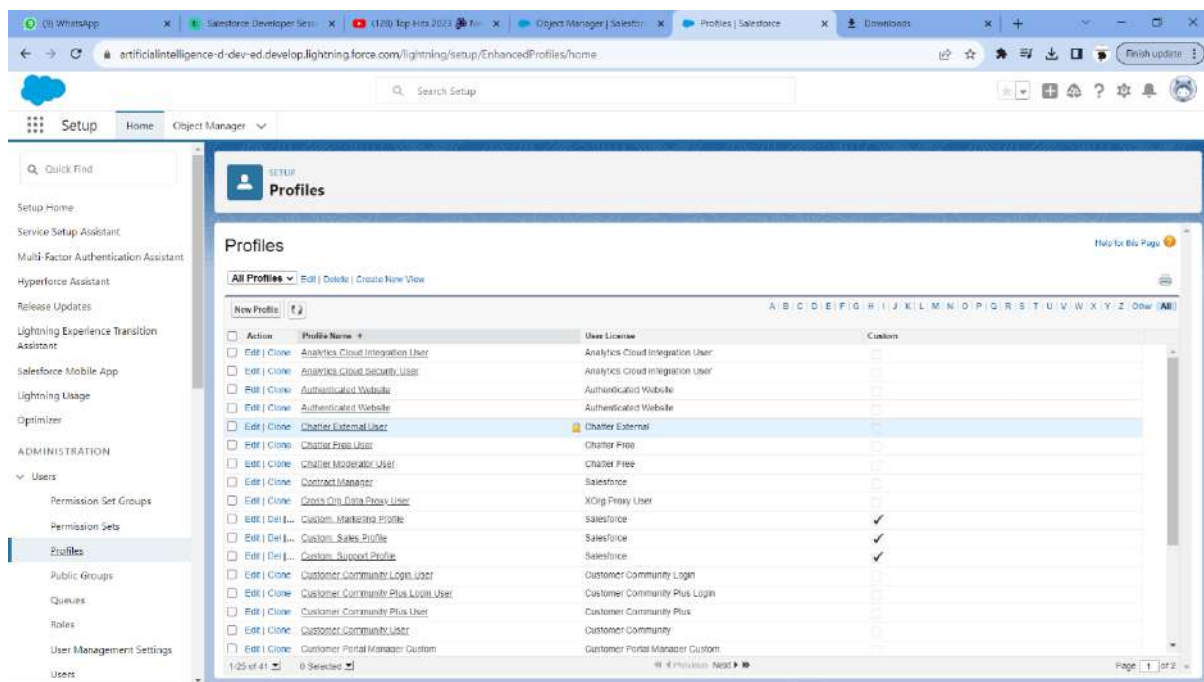
krishna.s, 01/10/2023, 11:19 am

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.



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

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Profiles

All Profiles | Edit | Delete | Create New View

New Profile | f

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Single Partner User	Single 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 | 4 Profiles | Next > < Prev

Page 1 of 1

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

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

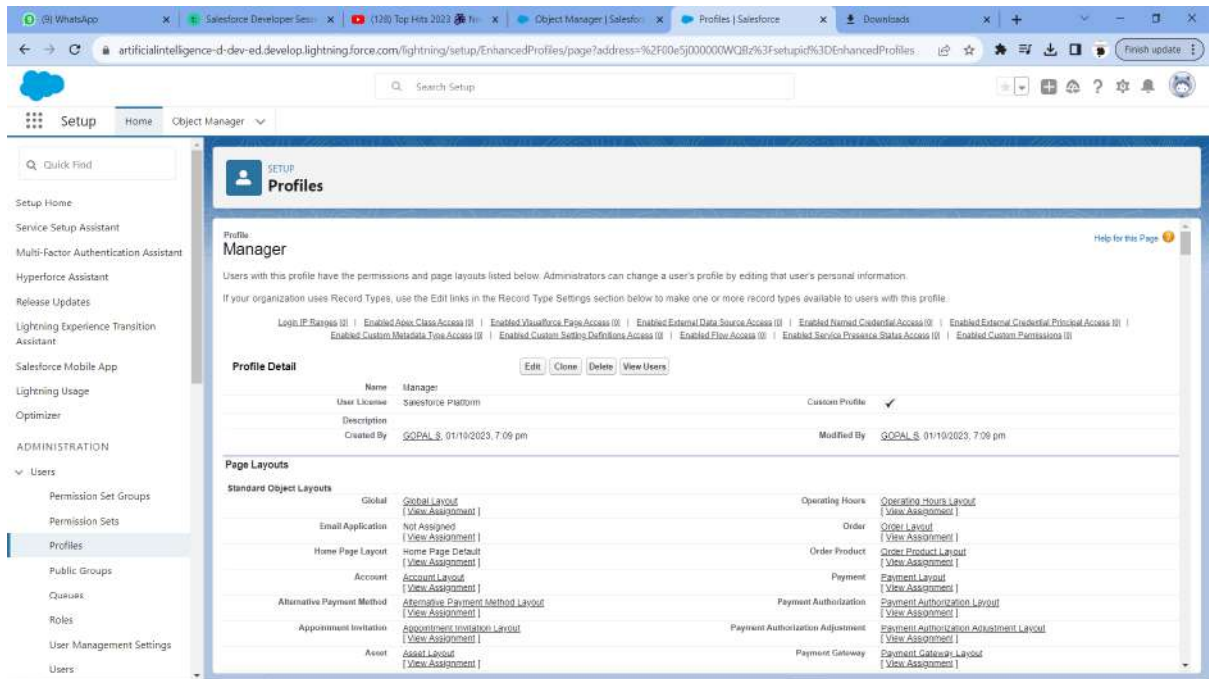
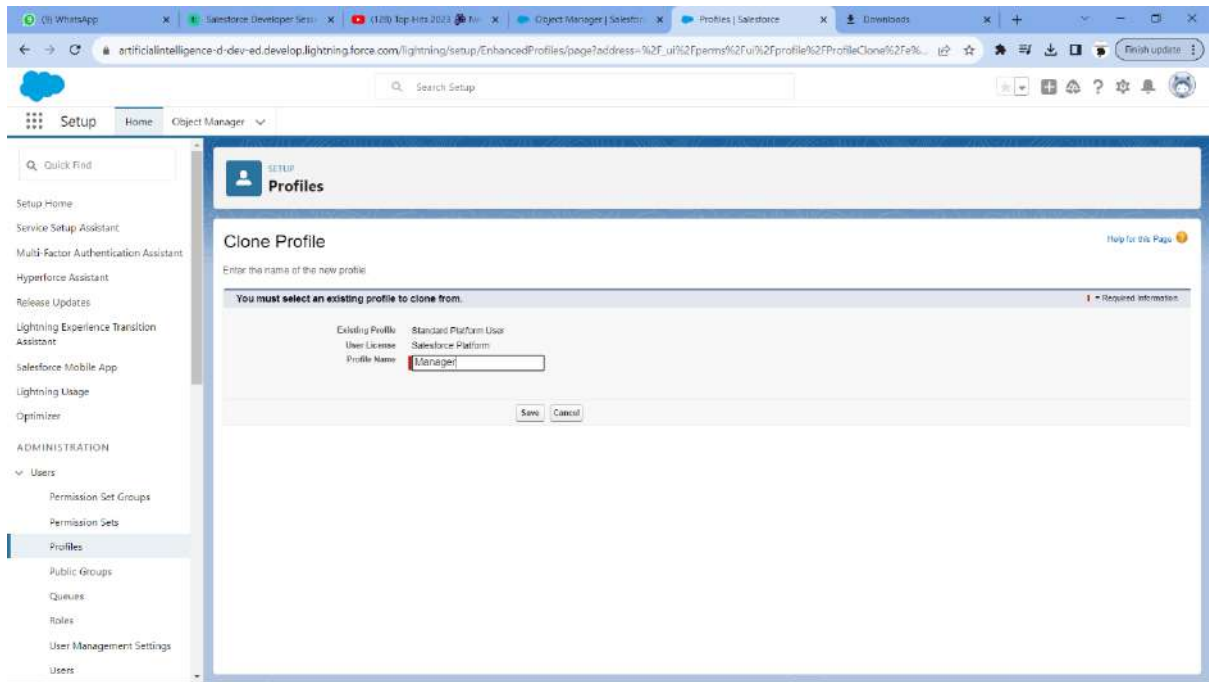
Clone Profile

Enter the name of the new profile

You must select an existing profile to clone from.

Existing Profile	User License	Profile Name
Standard Platform User	Standard Platform	

Save Cancel



Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

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ADMINISTRATION

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Queues

Roles

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Users

Profiles

Manager

Set the permissions and page layouts for this profile

Profile Edit

Name: Save Save & New Cancel

User License: Salesforce Platform Custom Profile: ☒

Description:

Custom App Settings

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

☐ Overwrite users' personal tab customizations

Standard Tab Settings

	Home	Default On
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alert Settings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Learning: ☒ Default On

Libraries: ☒ Tab Hidden

Lightning Bolt Solutions: ☒ Default On

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Permission Sets

Profiles

Public Groups

Queues

Roles

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Users

Profiles

Communication Subscription Channel Types

	Read	Create	Edit	Delete	View All	Modify All
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Individuals

	Read	Create	Edit	Delete	View All	Modify All
Locations	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

	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"/>
customers	<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"/>

Session Settings

Session Timeout After:

Session Security Level Required at Login:

Password Policies

User passwords expire in:

Enforce password history:

Minimum password length:

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2F%3FretURL%3D%2F00e5j0...

Setup Home

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

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 - Profiles**
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
 - Users

SETUP Profiles

	Basic Access		Data Administration		
	Read	Create	Edit	Delete	View All
Contact Point Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

	Basic Access		Data Administration		
	Read	Create	Edit	Delete	View All
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

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

	Basic Access		Data Administration		
	Read	Create	Edit	Delete	View All
Enhancement Requests	<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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2F%3FretURL%3D%2F00e5j0...

Setup Home

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SETUP Profiles

Custom Object Permissions

	Basic Access		Data Administration		
	Read	Create	Edit	Delete	View All
Bank	<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"/>

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

Session Settings

Session Times Out After: 2 hours of inactivity

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

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Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answers for password resets: ☐

Require a minimum 1 day password lifetime: ☐

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

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- Apps

Search Setup

Users

New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only) ☐

High Contrast Palette on Charts ☐

Load Lightning Pages While Scrolling ☒

Debug Mode ☐

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PLATFORM TOOLS

- Apps

Search Setup

Users

New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only) ☐

High Contrast Palette on Charts ☐

Load Lightning Pages While Scrolling ☒

Debug Mode ☐

Users

User: **sowmiya bala**

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

User Detail

Name	sowmiya bala	Role	Salesforce Platform
Alias	sbiak	User License	Marketing
Email	2520cse17a@knot.ac.in (Watch)	Profile	Marketing
Username	25210@KNOT.AC.IN	Active	<input checked="" type="checkbox"/>
Nickname	User16951677128256422616	Marketing User	<input type="checkbox"/>
Title	worker	Offline User	<input type="checkbox"/>
Company	knot bank	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Sales.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input checked="" type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registrations: One-Time Password Authenticator	<input type="checkbox"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	<input type="checkbox"/>	Salesforce CRM Content User	<input checked="" type="checkbox"/>

Gmail

Search in mail

Active

1 of 6,496

support@salesforce.com <support@salesforce.com>
to me

7:15 PM (0 minutes ago)

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:
25210@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%26fromFrontdoor=1&satupid=Ch...

salesforce

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password: Good

* Confirm New Password: Match

Security Question

▼ In what city were you born?

* Answer:

Change Password

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

Login | Salesforce

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

salesforce

Username:

Password:

Log In

☐ Remember me

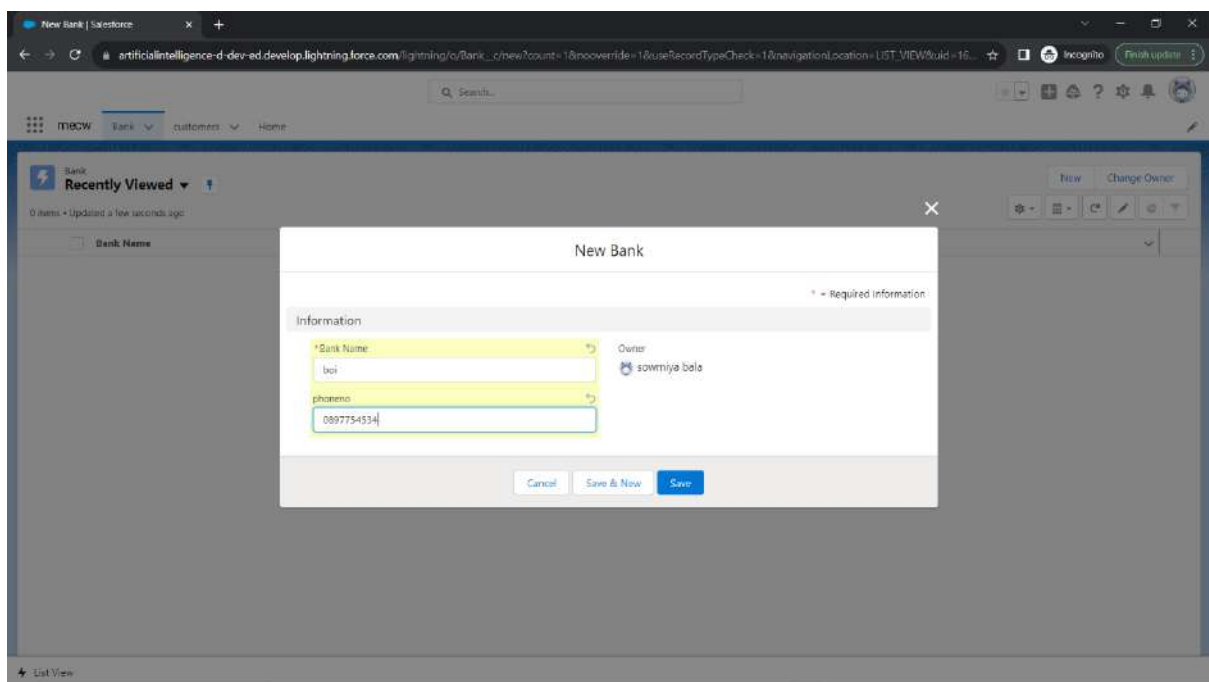
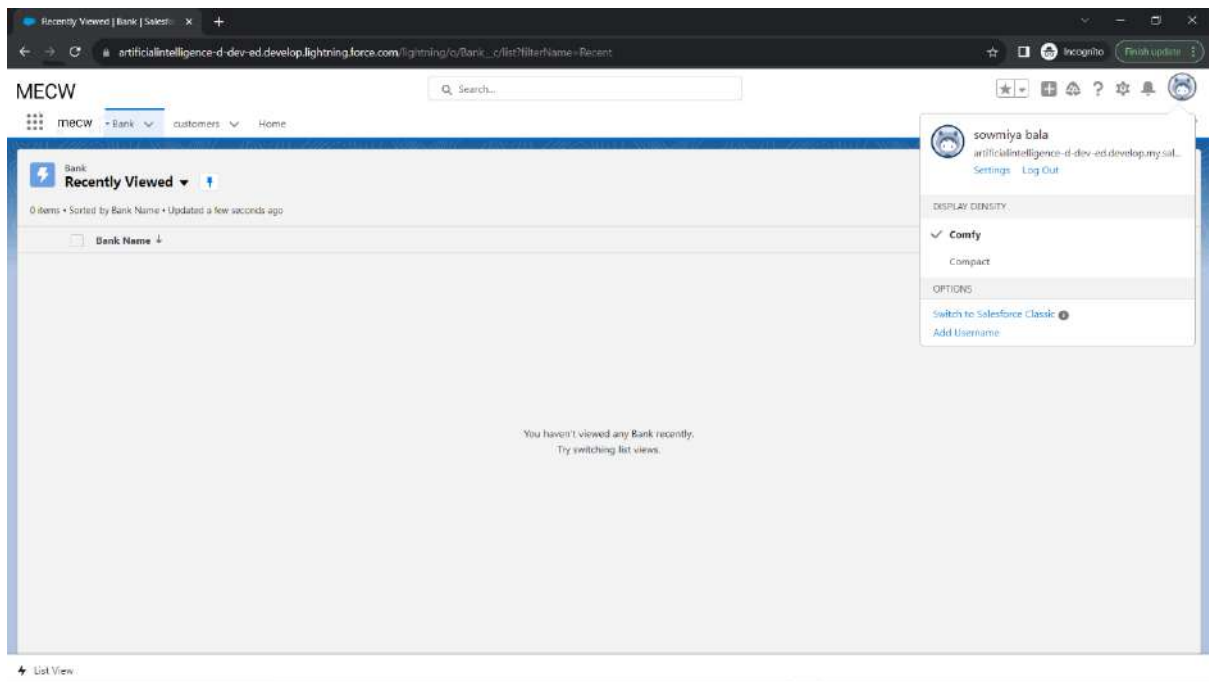
[Forgot Your Password?](#)

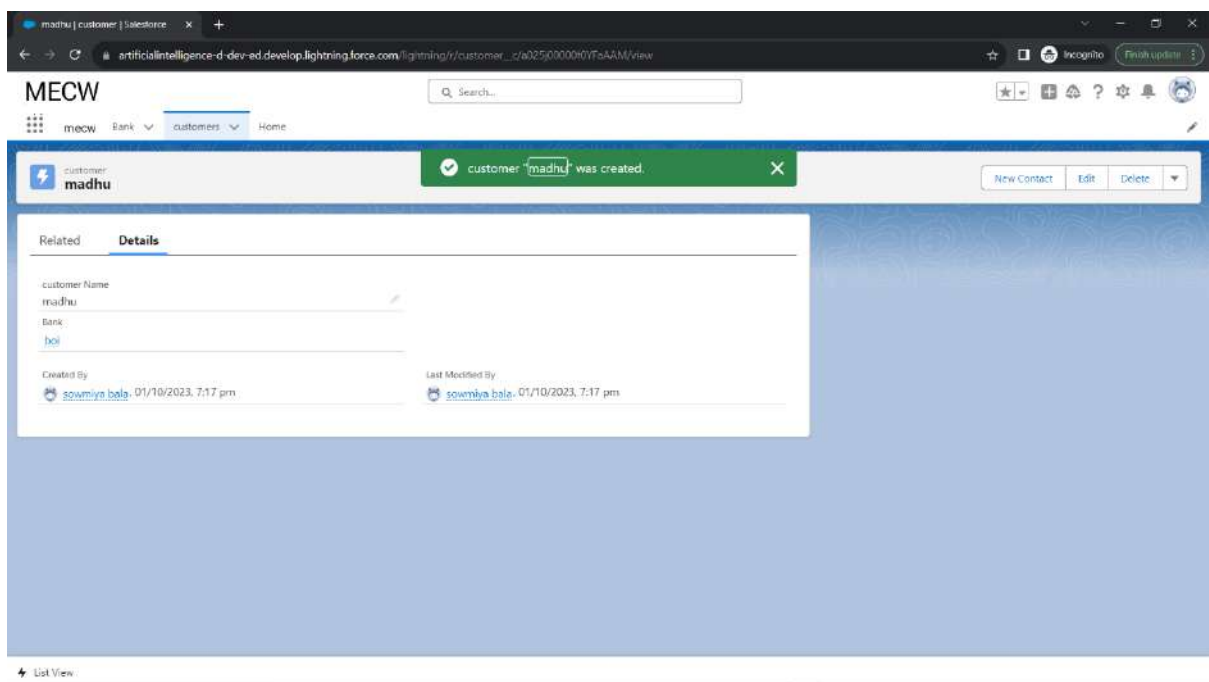
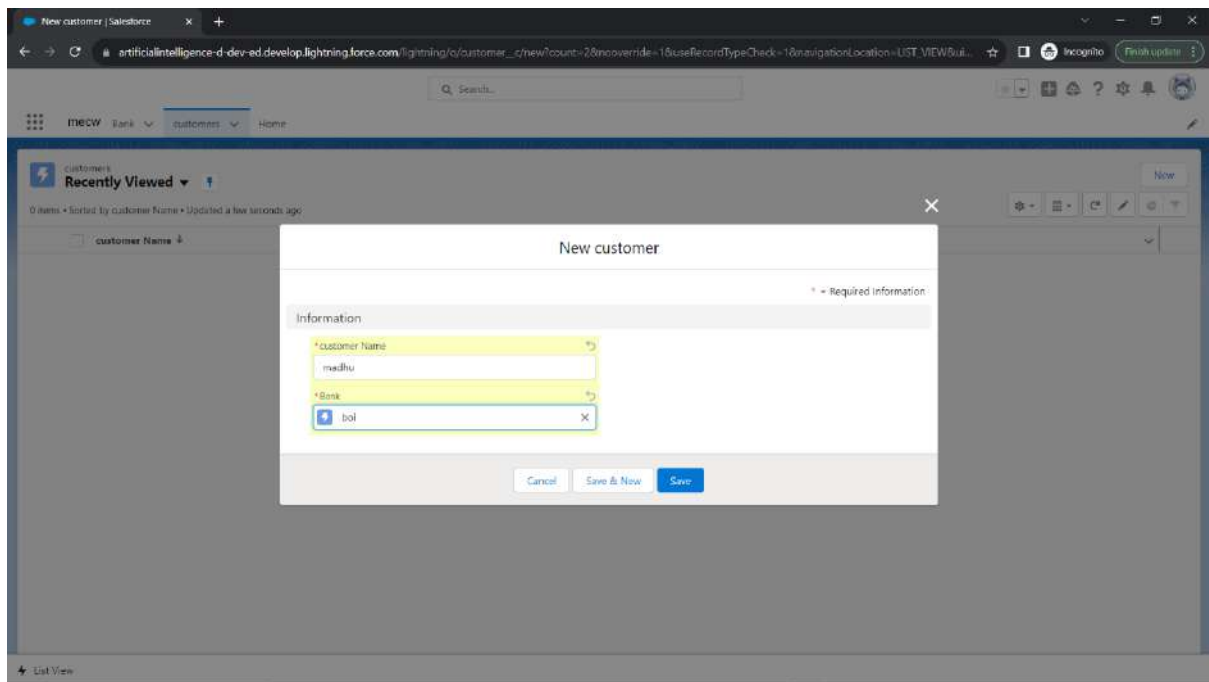
Join us for the future of trusted enterprise AI, streaming on Salesforce+.

WATCH ON DEMAND

AI Day

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artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%2Fef%3FretURL%3D%2F52FO...

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Custom Object Permissions

	Basic Access				View Administration		Basic Access				View 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"/>
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
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"/>

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%2Fef%3FretURL%3D%2F52FO...

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Custom Object Permissions

	Basic Access				View Administration		Basic Access				View 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"/>
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					<input checked="" type="checkbox"/>	<input type="checkbox"/>
Enhancement Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

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Maximum invalid login attempts: 10

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Require a minimum 1 day password lifetime: ☐

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

Save Save & New Cancel

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New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type

Data.com Monthly Addition Limit

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New User

User Edit Save Save & New Cancel

General Information

First Name madhu

Last Name b

Alias mb

Email 2620cse179@knot.ac.in

Username 2620cse179@knot.ac.in

Nickname User169616842426654192

Title worker

Company knot bank

Department Sales

Division

Role

User License Salesforce Platform

Profile salesmanage

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

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Mailing Address

Street

City

Zip/Postal Code

Status/Province

Country

Single Sign On Information

Federation ID

Locale Settings

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

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Recalls Approval Request Emails Only if I am an approver

Generate new password and notify user immediately

Save Save & Now Cancel

Setup Home Object Manager

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Permission Sets

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Embedded Service

Messaging for In-App and Web User

Verification

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SETUP Users

Mailing Address

Street 4/104 - aryanpatnam, uhamasolapuram...

City SALEM

Zip/Postal Code 636308

Status/Province TAMIL NADU

Country

Single Sign On Information

Federation ID

Locale Settings

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

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Recalls Approval Request Emails Only if I am an approver

Generate new password and notify user immediately

Save Save & Now Cancel

Setup Home Object Manager

Search Setup

user

Users

User Detail

Name: madhu b

Alias: mb

Email: 2k20cs17a@kiet.ac.in (madhu)

Username: 2k20cs17a@kiet.ac.in

Nickname: User16951684242865419206

Title: worker

Company: kiet bank

Department: Sales

Division:

Address: 4/154, arimmozaiyam, uttamasapuram, Parakkodu, Salem-636308, TAMIL NADU

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

Locale: English (India)

Language: English

Manager:

Delegated Approver:

Receive Approval Request Emails: Only if I am an approver

Federation ID:

App Registration One-Time Password Authentication:

Role: Salesforce Platform

User License: salesmanage

Profile: Active

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Slack.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/FMfcgGtsStlSsqKQzCQhbDnsOxvI

Search in mail

Active

KNOWLEDGE

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:

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

Username: 2k20cs17a@kiet.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/.../system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp%3FfromFrontdoor=1&stupid=ChangePa...

salesforce

Change Your Password

Enter a new password for **2k20cit@kilot.ac.in**. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password:

* Confirm New Password:

Security Question:
In what city were you born?

* Answer:

Change Password

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

Recently Viewed | Bank | Salesforce

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

MECW Bank customers Home

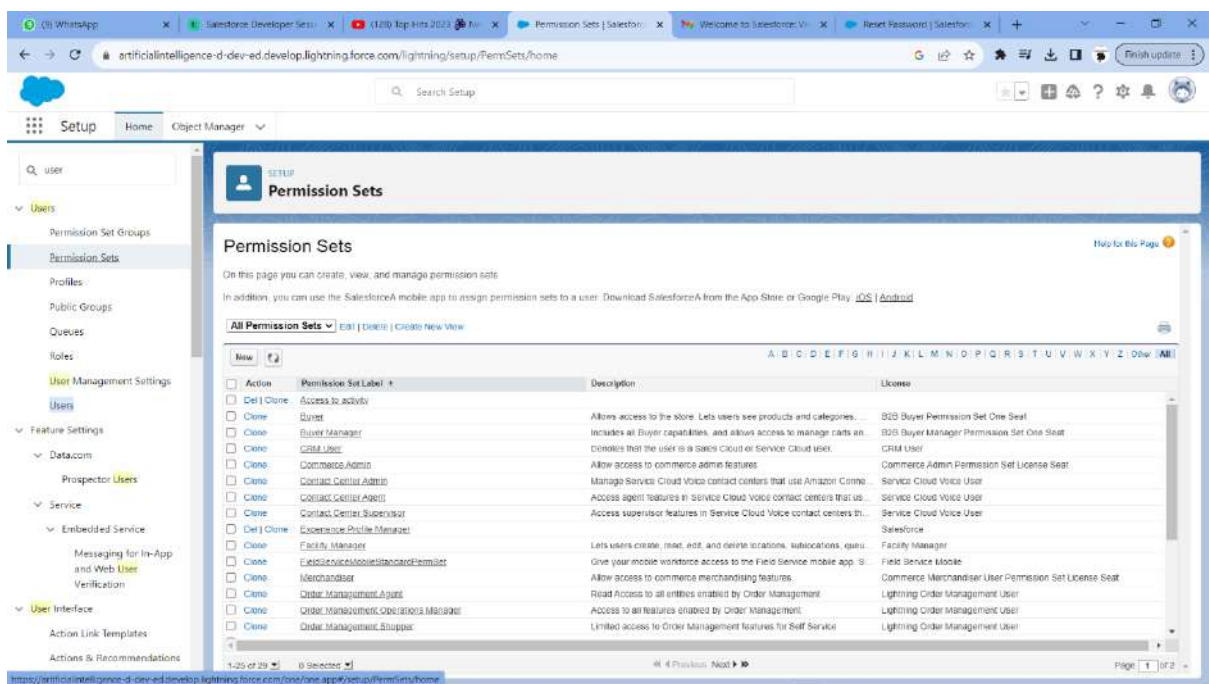
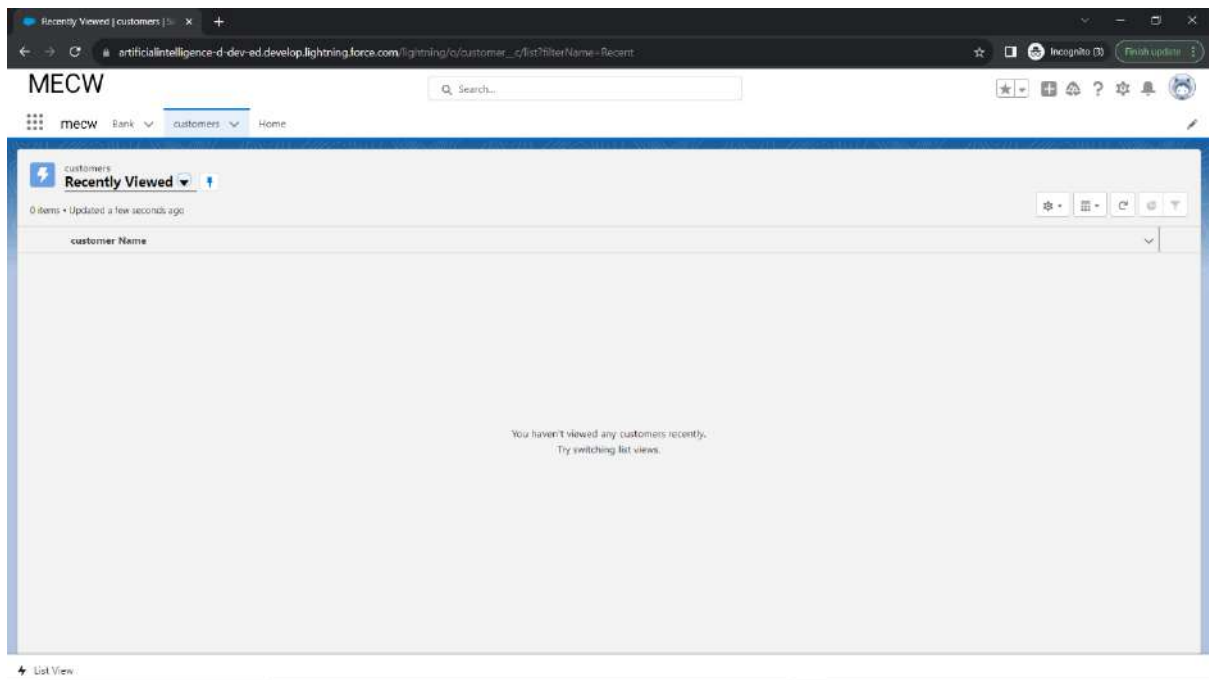
Search...

Bank: Recently Viewed

0 items • Updated a few seconds ago

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

List View



Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:

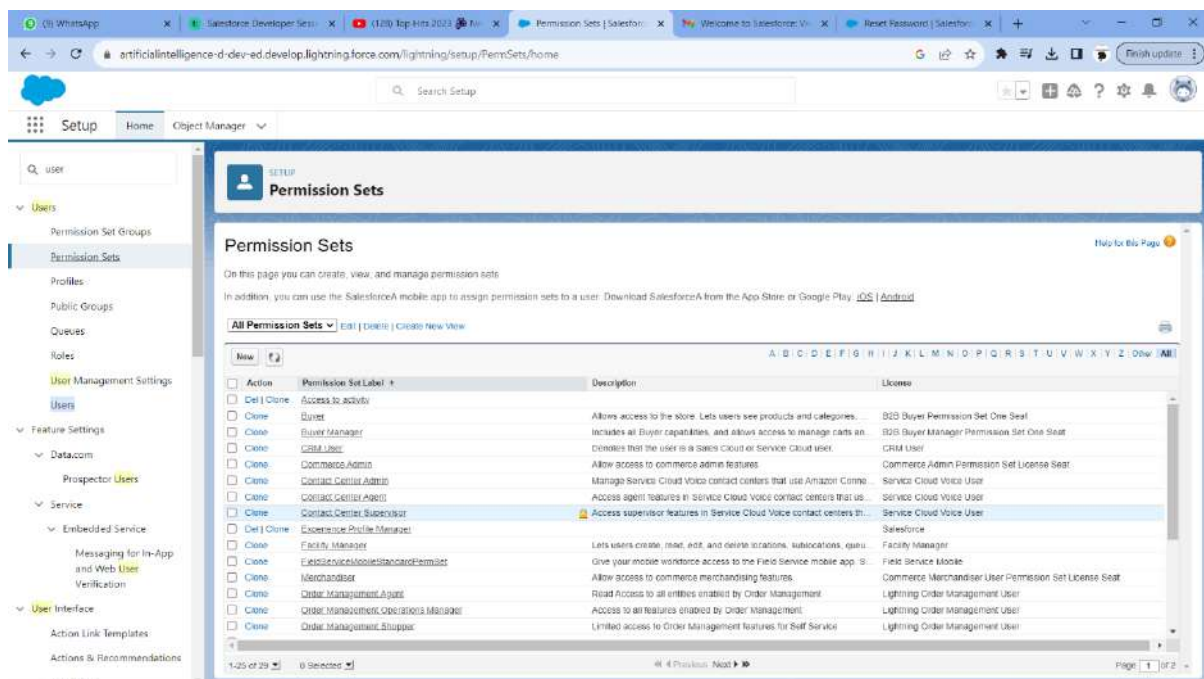
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

Organization-Wide Defaults:

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

Testing:

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



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links for Setup, Home, Object Manager, Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Datacom, Prospector Users, Service, Embedded Service, Messaging for In-App and Web User, Verification, User Interface, Action Link Templates, Actions & Recommendations, and App Menu. The main content area is titled "Permission Sets" and includes a search bar, a "New" button, and a table of existing permission sets.

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 parts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Provides 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, view, edit, and delete locations, sublocations, geo...	Facility Manager
<input type="checkbox"/> Clone	Field Service Location Scheduler	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/> Clone	Merchadiser	Allow access to commerce merchandising features.	Commerce Merchadiser 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

Setup Home Object Manager

Search Setup

user

Users

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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

Setup Home Object Manager

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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

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Permission Set

salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name
License	salesmanager
Session Activation Required	None
Last Modified By	Created By
GOPAL S. 01/10/2023, 7:29 pm	GOPAL S. 01/10/2023, 7:29 pm

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

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

Object Settings

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

App Permissions

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

Apex Class Access

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

External Data Source Access

Permissions to authenticate against external data sources

Flow Access

Permissions to execute Flows

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

Learn More

Setup Home Object Manager

user

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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 Insights Reasons	No Access	—	—
AI Recent Insights	No Access	—	—
Alternative Payroll Methods	No Access	27	—
API Analytics Event Stores	No Access	14	—
App Analytics Query Requests	No Access	—	—
Application Usage Assignments	No Access	—	—
Appointment Categories	No Access	9	—
Appointment Invitations	No Access	17	—
Appointment Invites	—	4	—
Appointment Schedule Assignments	No Access	—	—
Appointment Schedule Logs	No Access	—	—
Appointment Topic Time Slots	No Access	6	—
Asset Actions	No Access	50	—
Asset Action Sources	No Access	18	—
Asset Relationships	—	10	—
Assets	No Access	42	—
Asset State Periods	No Access	11	—

Setup Home Object Manager

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user

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Permission Set: salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank Edit

Tab Settings

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

Object Permissions

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

Field Permissions

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

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

Setup Home Object Manager

Search Setup

user

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Permission Set: salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank Save Cancel

Tab Settings

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

Object Permissions

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

Field Permissions

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

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salesmanager

Current Assignments

Add Assignment

No assignments defined.

Setup Home Object Manager

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Select Users to Assign

All Users

1 item selected

Search this list...

	Full Name	All...	Username	Role	Ac...	Profile
<input type="checkbox"/>	Amelia Ellington	aelli	amelia.ellington.146kxq8oodh.d6cxpdcu4whunbdammhwhqwgucprtdalv@gmail.com	✓		Force.com - App Subscription User
<input type="checkbox"/>	Chatter Expert	Chatter	chatty60d50000bckkeab.1c0bfwmpgkx@chatter.salesforce.com	✓		Chatter Free User
<input type="checkbox"/>	Diya Adanna	dsidan	test_diya_pas4wlbjyb9wll.tzgrgobkpx.3gltokovzuns.N43bzv6m6sa@gmail.com	✓		UIMS User
<input type="checkbox"/>	GOPAL S	GS	kiots20@gmail.com	✓		System Administrator
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000bckkeab.com	✓		Analytics Cloud Integration User
<input checked="" type="checkbox"/>	madhu b	mb	2k20ctch@idot.ac.in	✓		salesmanager
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000bckkeab.com	✓		Analytics Cloud Security User
<input type="checkbox"/>	sowmiya bala	sbala	2k21M@idot.ac.in	✓		Manager

Cancel Next

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PSJ000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

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user

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Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom 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#eyJjb21wb25lbnRZcWY0LzZXR1cF9wbG0Zm0ybyV9wZKhczpwc2RTSZXN1bi1lRQYWdlbW...

Setup Home Object Manager

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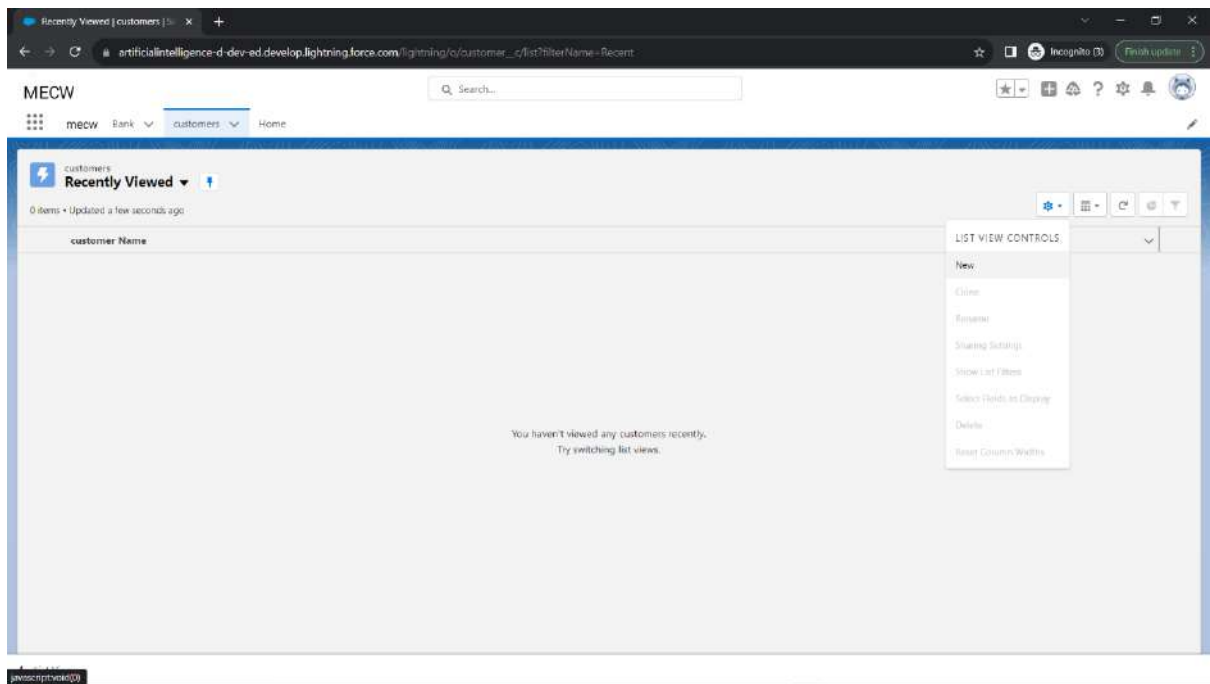
PERMISSION SET: SALESMAAN

1 assignments were successful.

Assignment Summary

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

Done

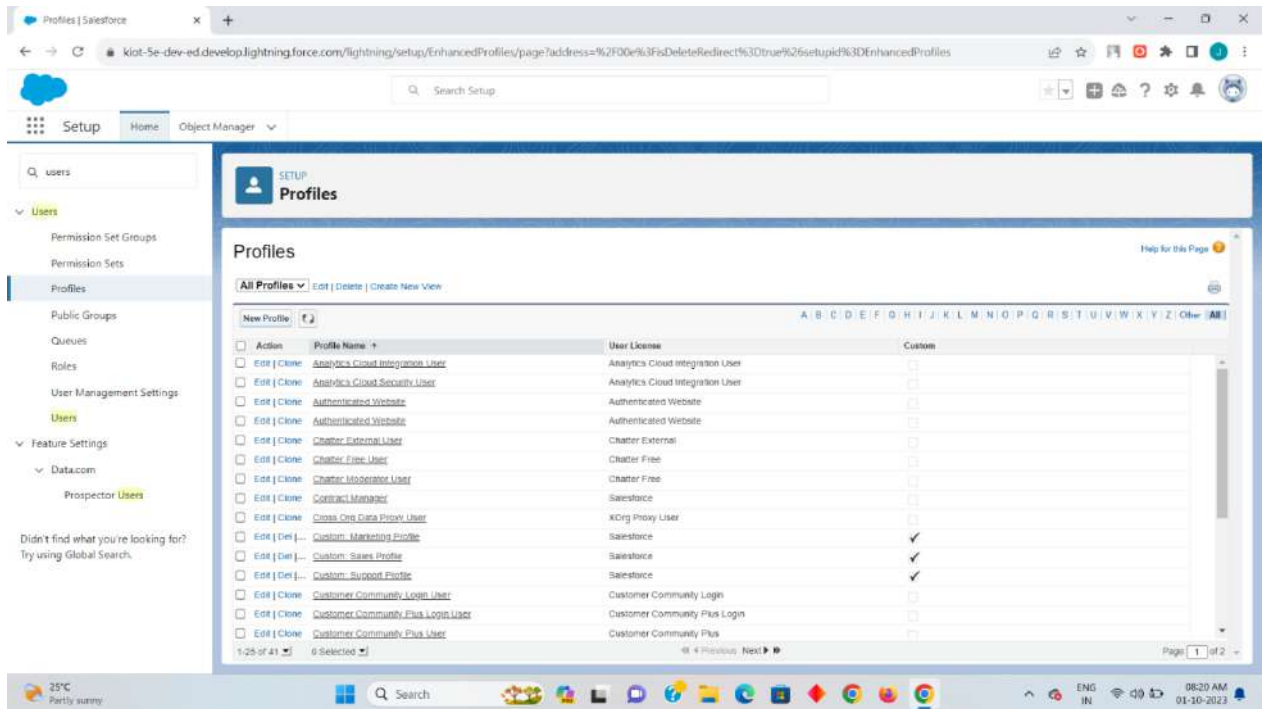


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

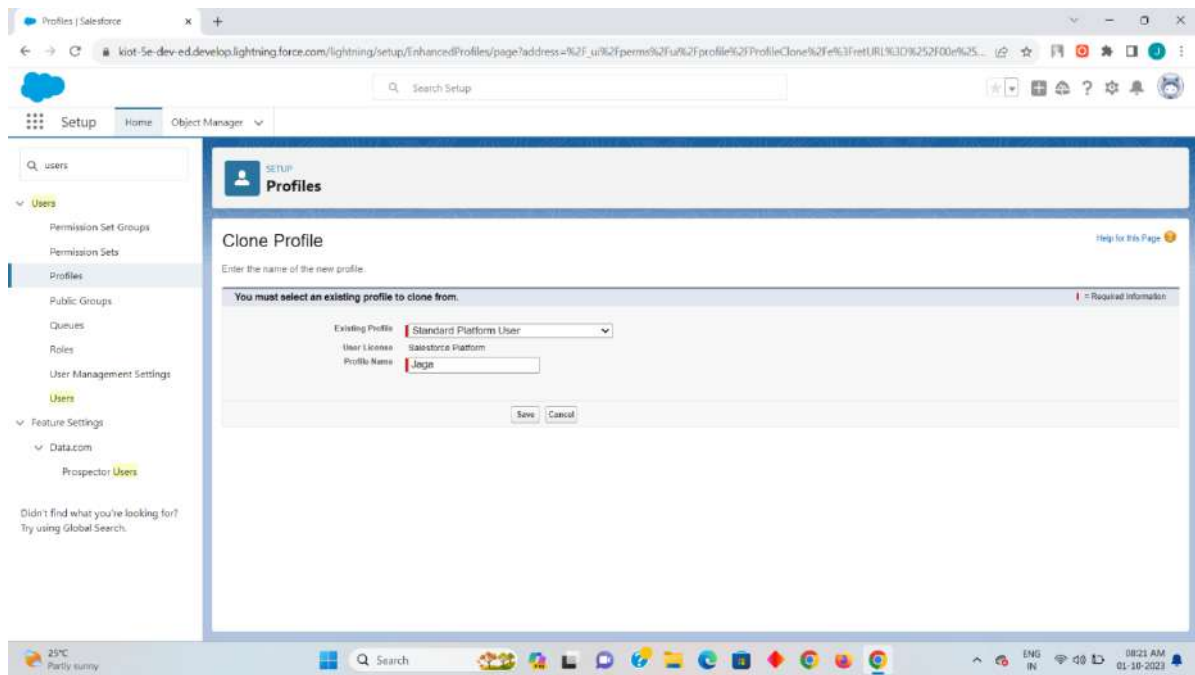
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

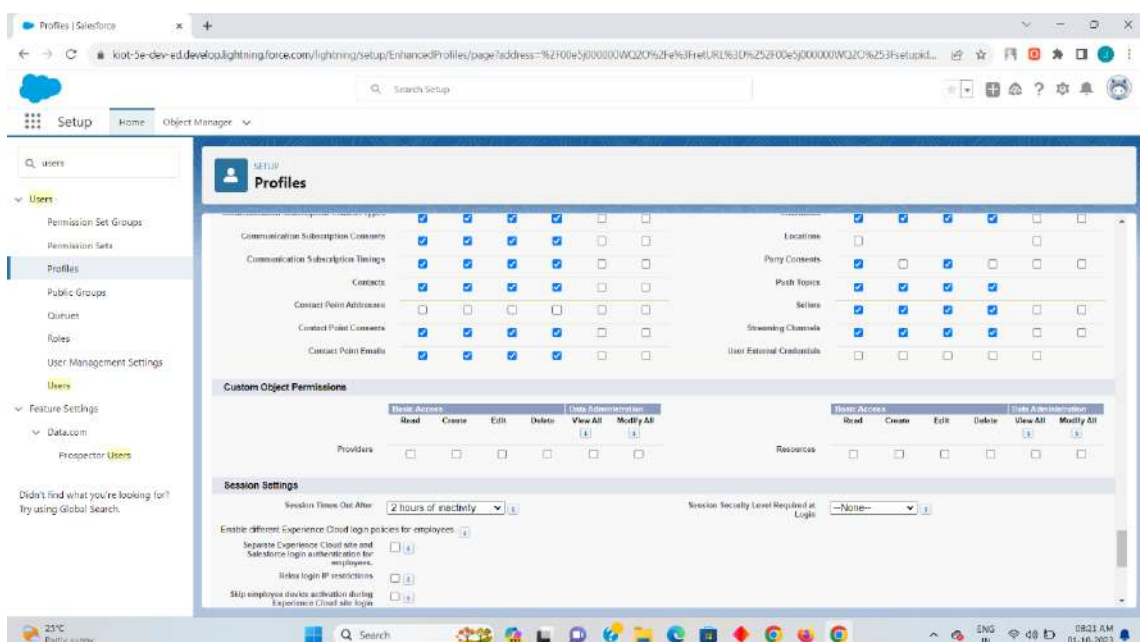
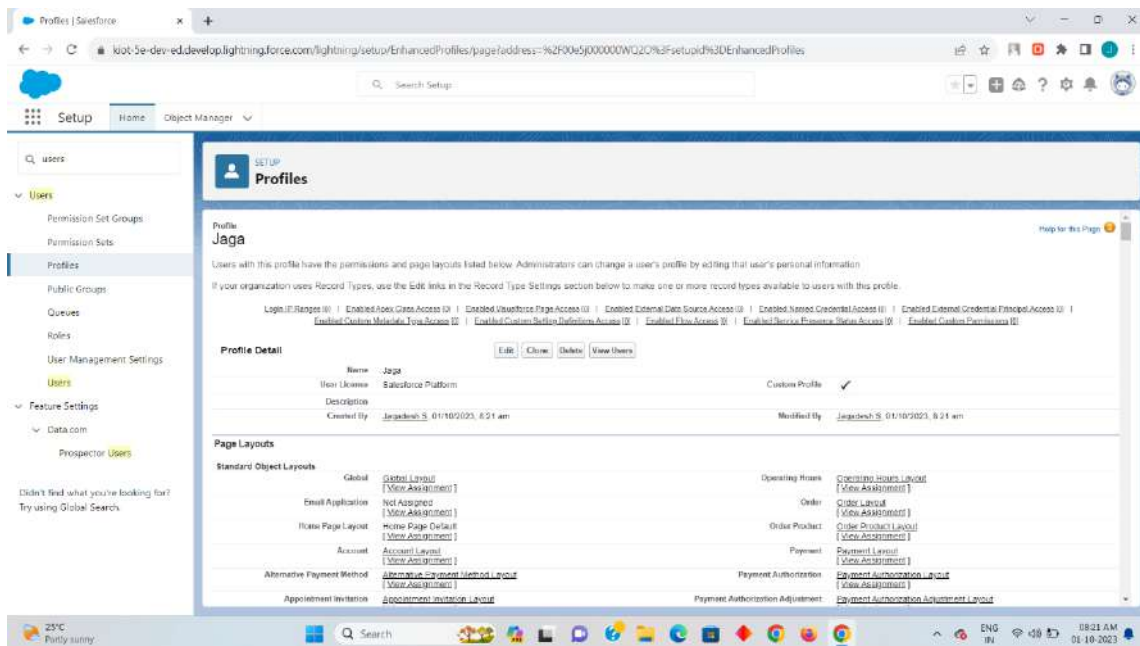
Click on the new to create a new profile along with the label and Api



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

Search Setup

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

SETUP Profiles

Communication Subscription Consents

Profile	Consent	Consent	Consent	Consent	Consent	Consent
Profile 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Communication Subscription Timings

Profile	Timings	Timings	Timings	Timings	Timings	Timings
Profile 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Contacts

Profile	Contacts	Contacts	Contacts	Contacts	Contacts	Contacts
Profile 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Contact Point Addresses

Profile	Addresses	Addresses	Addresses	Addresses	Addresses	Addresses
Profile 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Contact Point Consents

Profile	Consents	Consents	Consents	Consents	Consents	Consents
Profile 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Contact Point Emails

Profile	Emails	Emails	Emails	Emails	Emails	Emails
Profile 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Profile 10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Custom Object Permissions

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

Session Settings

Session Times Out After:

Session Security Level Required at Login:

Enable different Experience Cloud login policies for employees: ☐

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

Rules login IP restrictions: ☐

Skip employee device activation during Experience Cloud site login: ☐

Profiles | Salesforce

Search Setup

Setup Home Object Manager

Users

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

Feature Settings

- Data.com
- Prospector Users

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

SETUP Profiles

Profile Edit

Name:

User License:

Description:

Custom Profile: ☒

Custom App Settings

App	Visible	Default
Analytics Studio (standard__Analytics)	<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

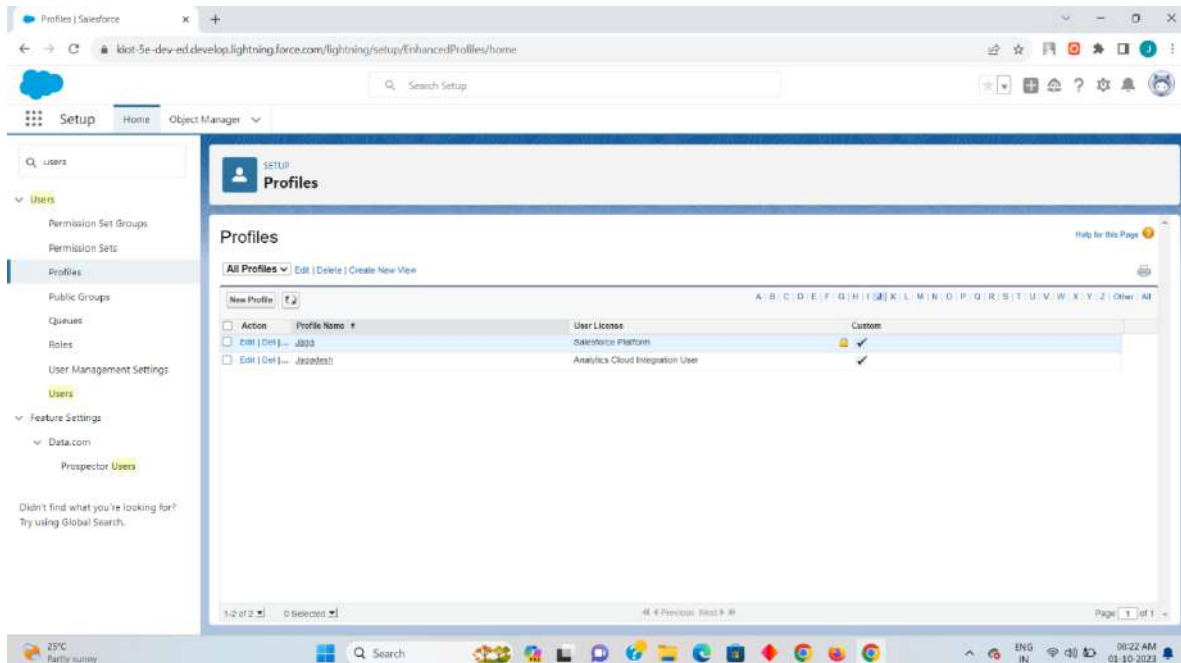
☐ Overwrite users' personal tab customizations

Tab Settings

☐ Overwrite users' personal tab customizations

Step 4

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

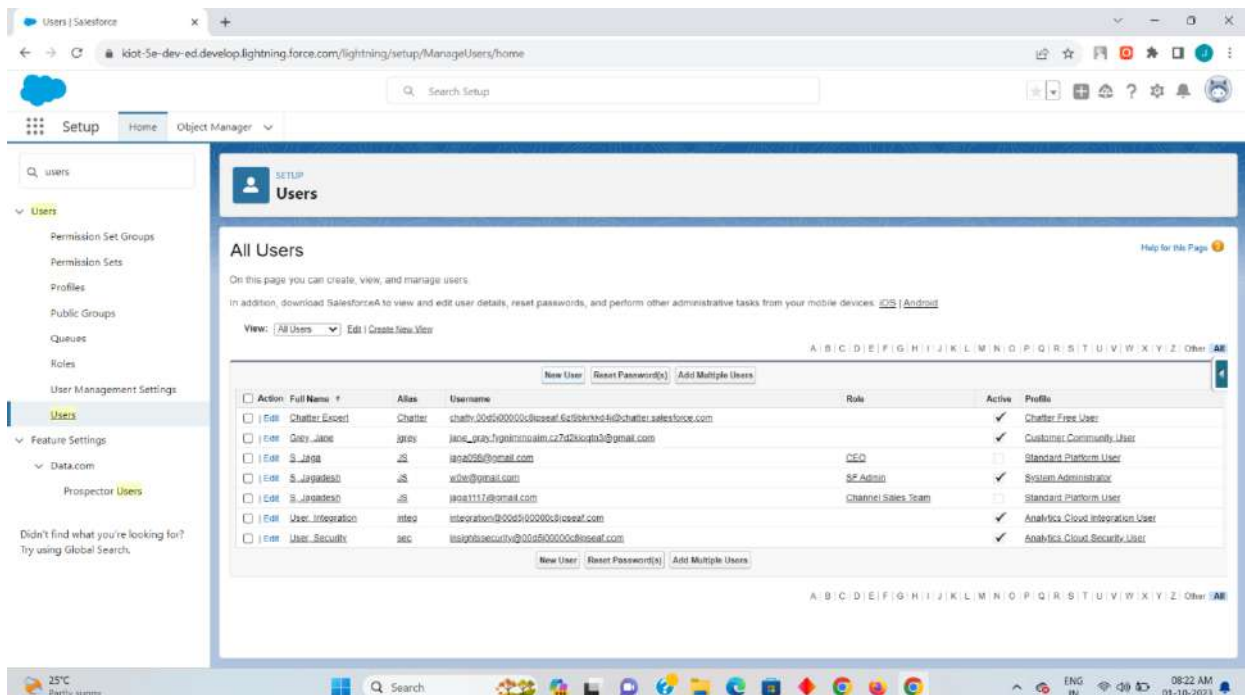


The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains navigation options like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area displays the 'Profiles' section with a table of profiles.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Det ...	Jaga	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Det ...	Jagadash	Analytics Cloud Integration User	<input checked="" type="checkbox"/>

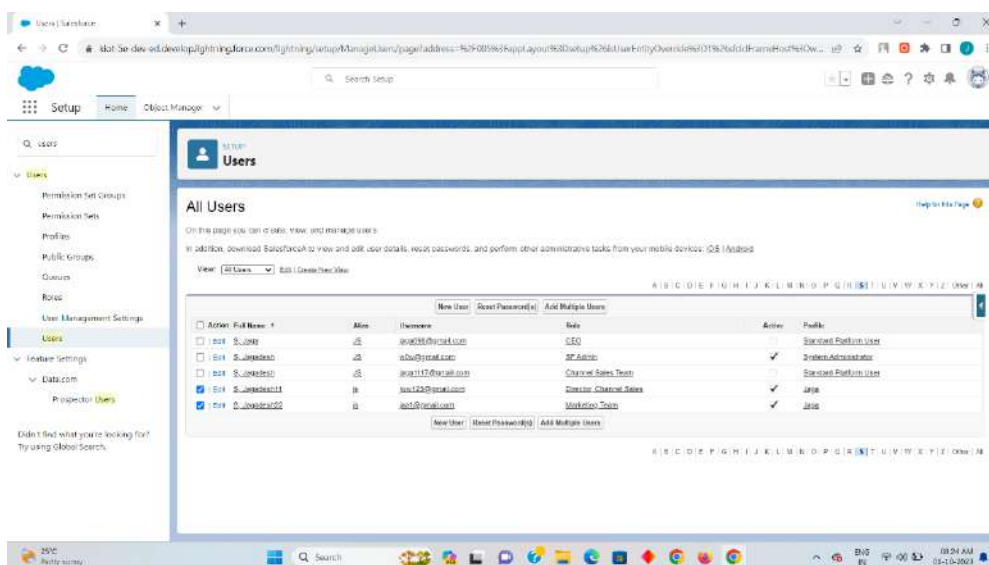
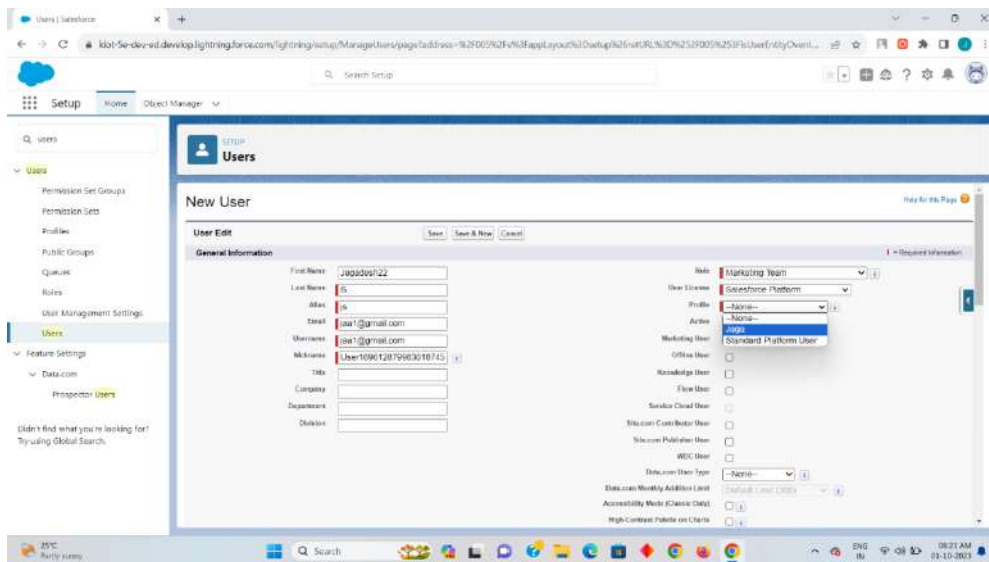
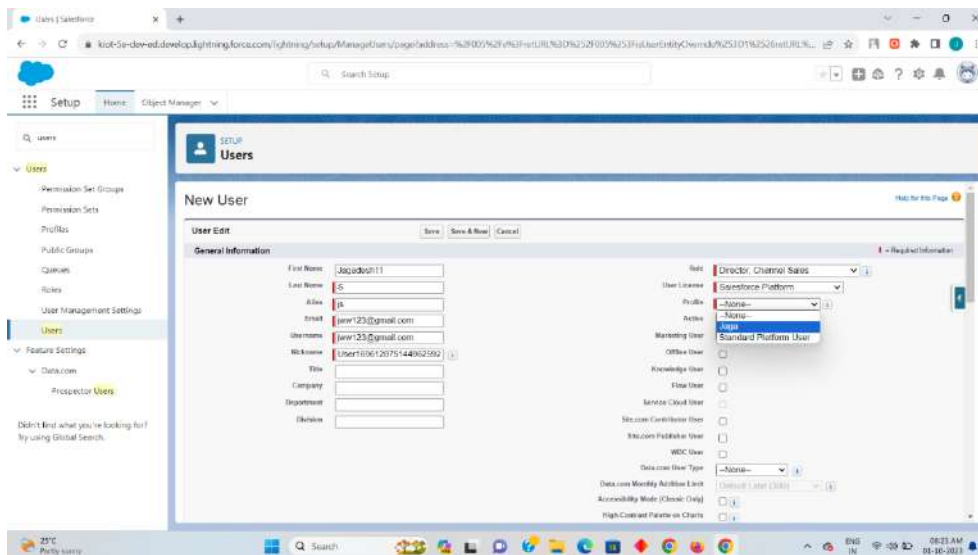
Step 5:

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.



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains navigation options like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Quizzes, Roles, and User Management Settings. The main content area is titled 'All Users' and includes a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_20454000000@salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Gary Jace	gary	gary_gary_frogmoss@salesforce.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/> Edit	S. Jaga	JS	jag056@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S. Jagadeesh	JS	sj06@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	S. Jagadeesh	JS	js081111@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration@00454000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	us@05600000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User



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

Step 6:

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

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

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories, includes all Buyer Organization, and allows access to manage calls at.	EDI Buyer Permission Set One Star
<input type="checkbox"/>	Buyer Manager	Limits that the user is a Buyer Cloud or Service Cloud user.	EDI Buyer Manager Permission Set One Star
<input type="checkbox"/>	CRM User	Allows access to commerce admin features.	CRM User
<input type="checkbox"/>	Commerce Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Commerce Admin Permission Set License Star
<input type="checkbox"/>	Contact Center Admin	Access agent features in Service Cloud Voice contact centers that use.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access supervisor features in Service Cloud Voice contact centers that use.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Let's users create, read, edit, and delete locations, subscriptions, and.	Service Cloud Voice User
<input type="checkbox"/>	Field Manager	Give your mobile workforce access to the First Service mobile app. It.	Field Manager
<input type="checkbox"/>	First Service Mobile	Allows access to commerce merchandising features.	First Service Mobile
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management.	Commerce Merchandiser User Permission Set License Star
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Organization Manager		Lightning Order Management User

1-25 of 30 | 0 Selected | Previous | Next

Page 1 of 2

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2Fnew/PermissionSet.apex

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

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Prospector Users

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

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

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0F55J000000Pta%3Fsf%3D%3CEntityPermissions

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

Permission Sets

permission12

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview

Owner	Admin	API Name	permission12
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	ajagachan@_ 01/10/2023, 8:24 am
Last Modified By	ajagachan@_ 01/10/2023, 9:24:59		

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 [field 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=%2F0F55J000000Pta%3Fsf%3D%3CEntityPermissions

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

Permission Sets

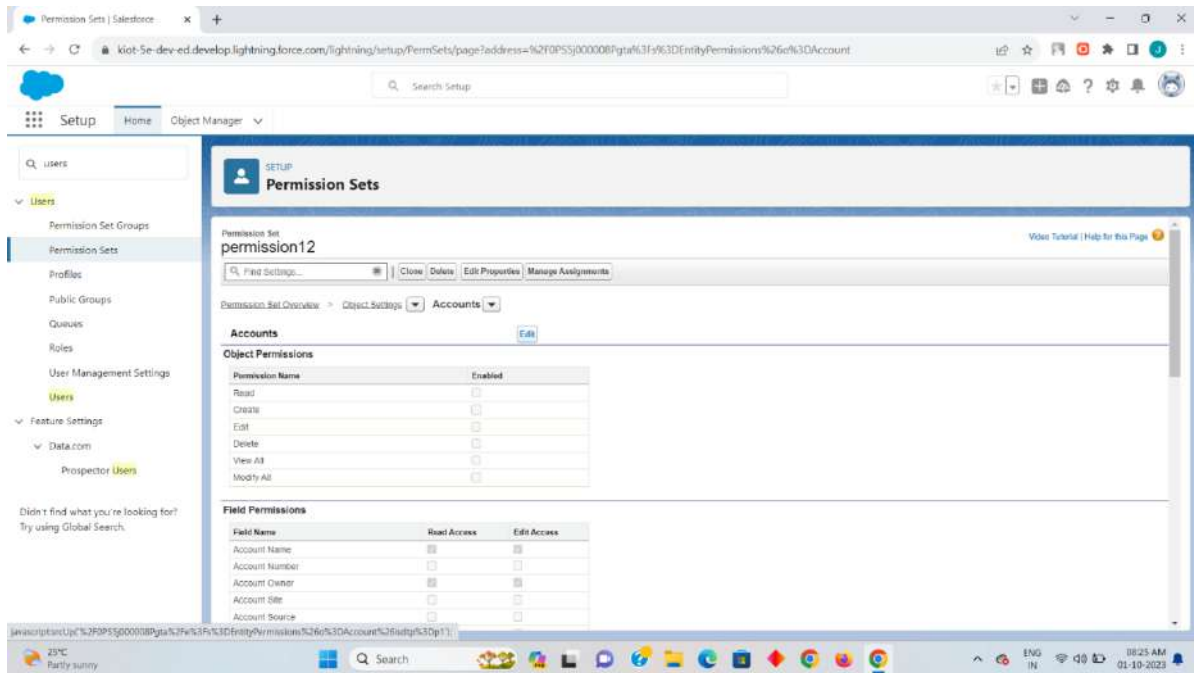
permission12

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings

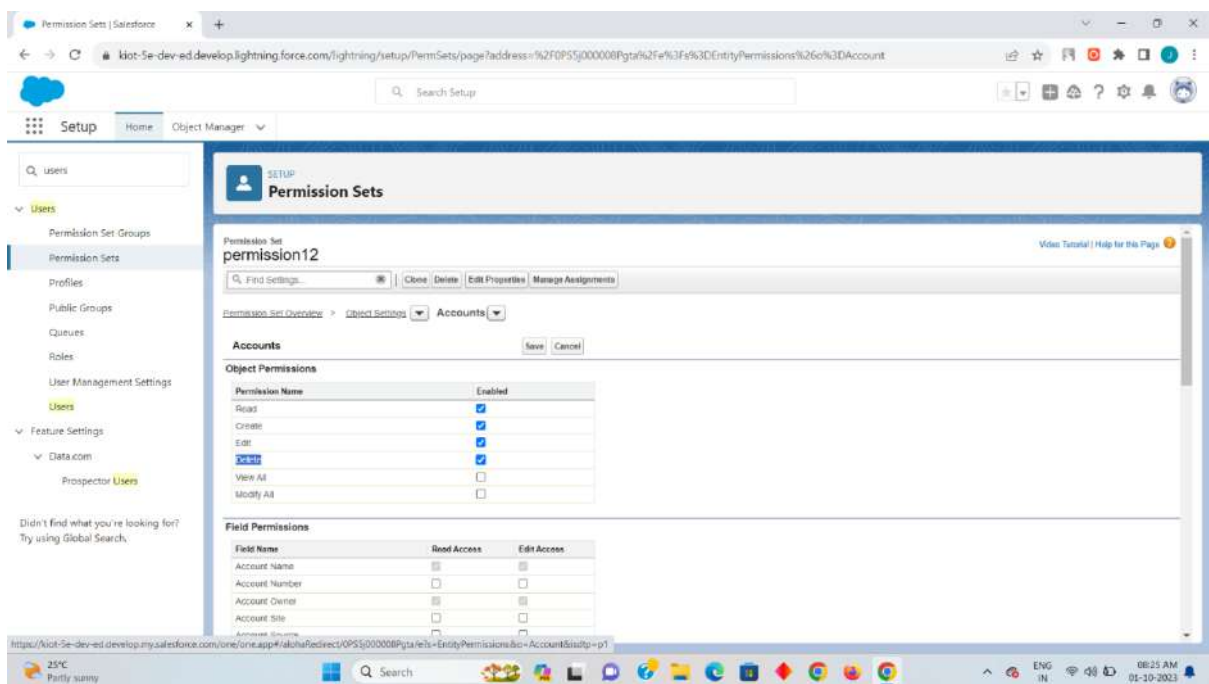
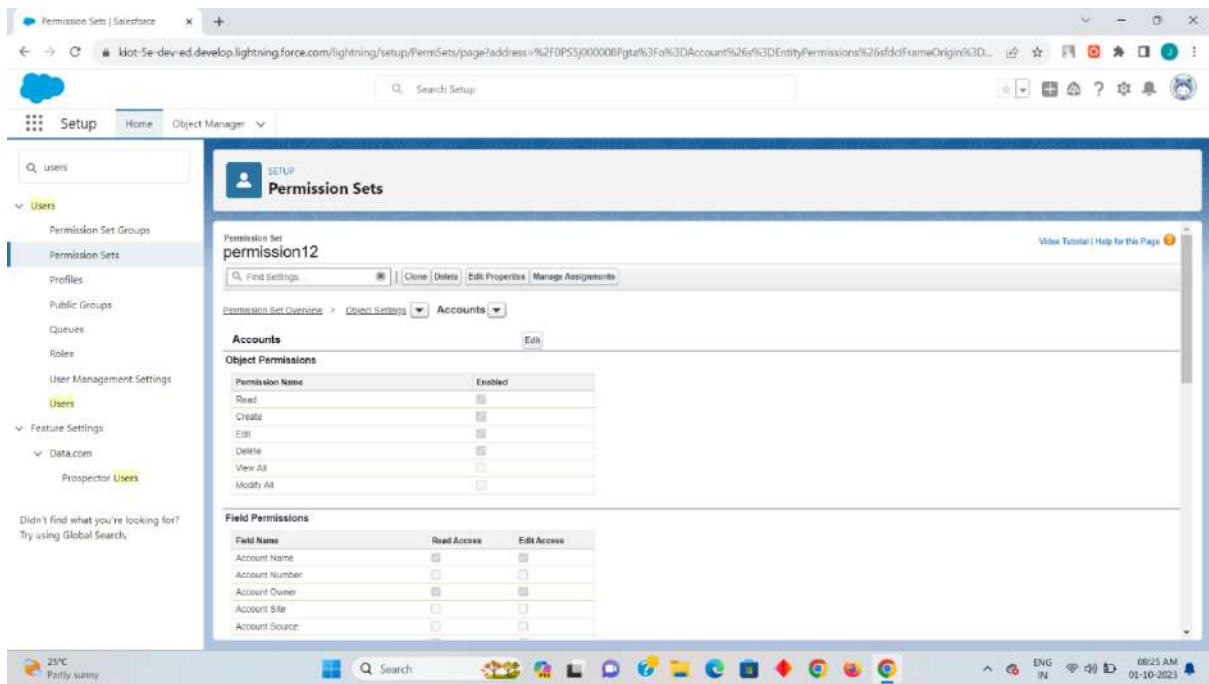
Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account	No Access	9	---
Account Contacts	No Access	44	---
Account Relationships	No Access	---	---
AI Record Insights	No Access	---	---
Alternative Payment Methods	No Access	27	---
API Automate Event Status	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 Topic Time Slots	No Access	6	---
Asset Actions	No Access	30	---
Asset Action Sources	No Access	18	---



Step 7:

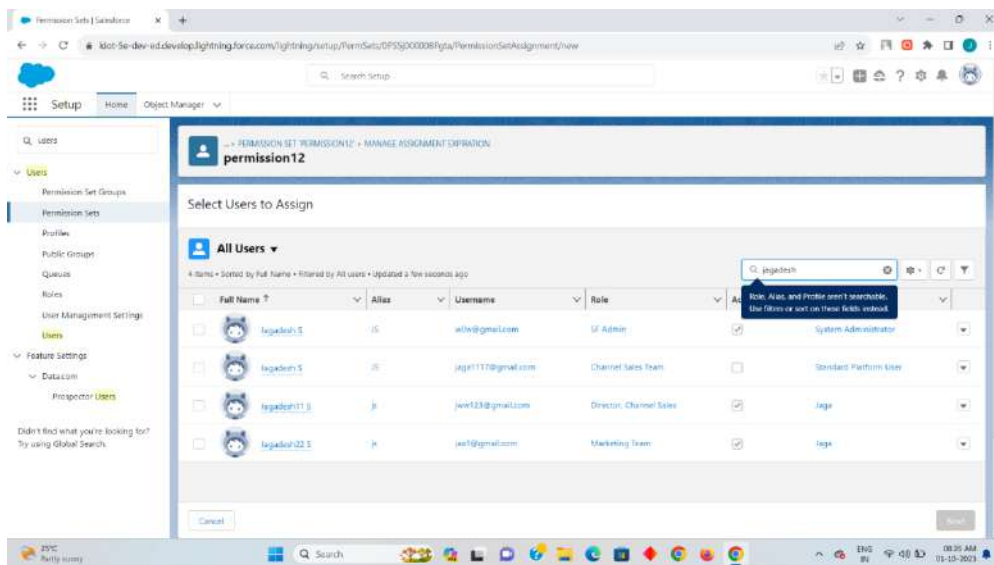
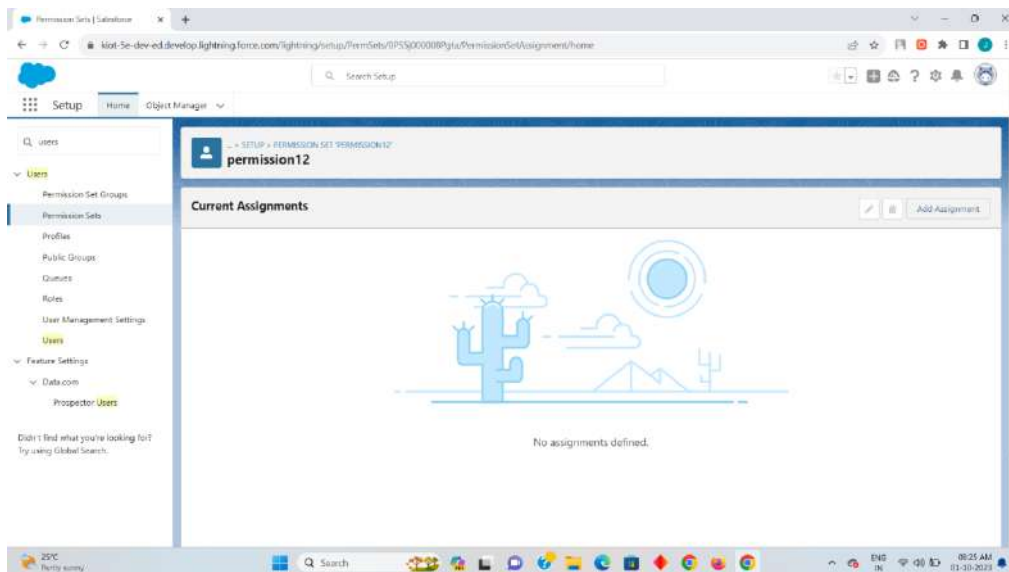
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

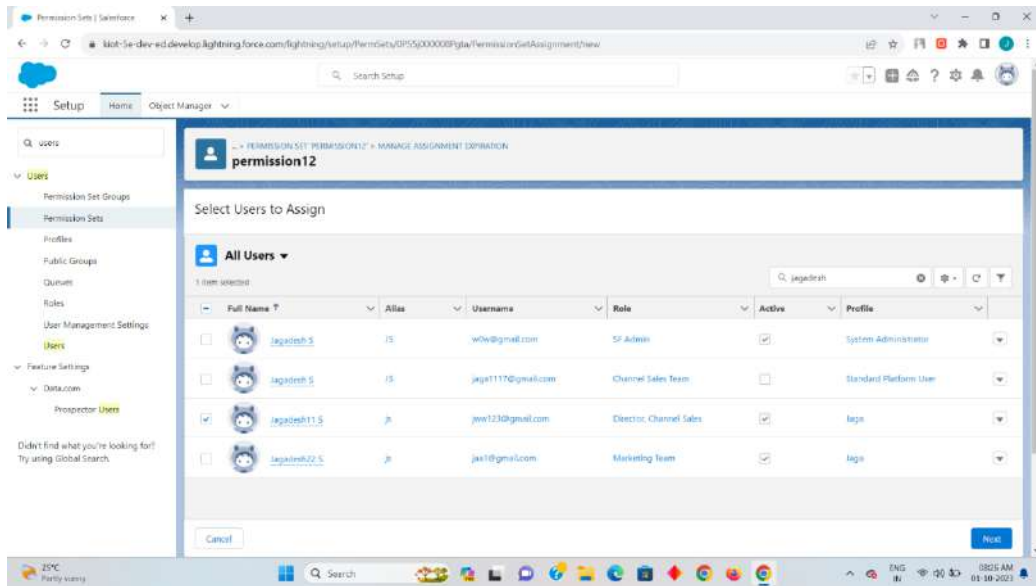


Step 8

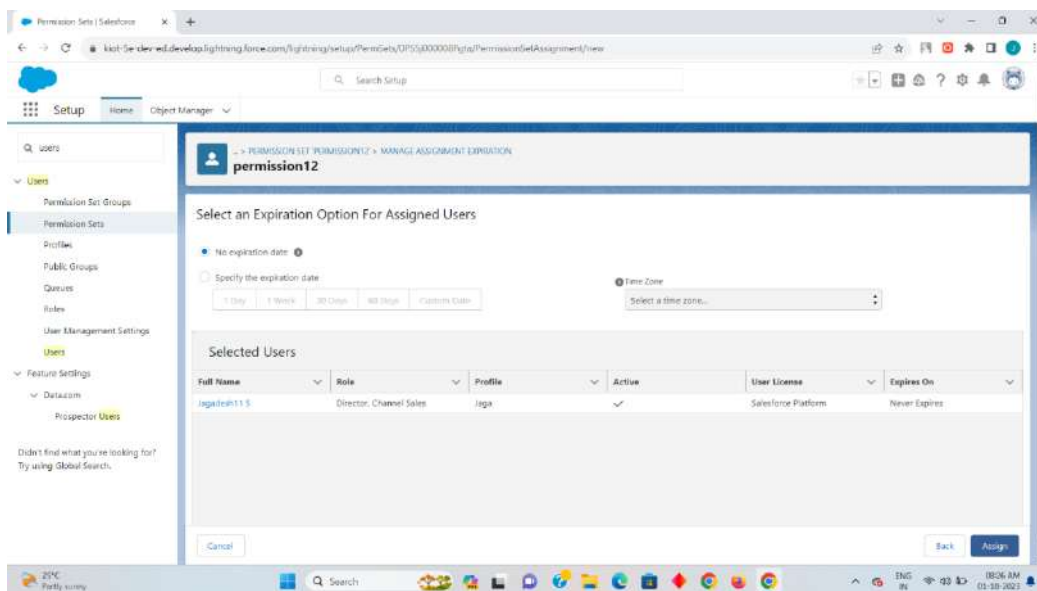
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific

selected user can have a special access as delete on it.

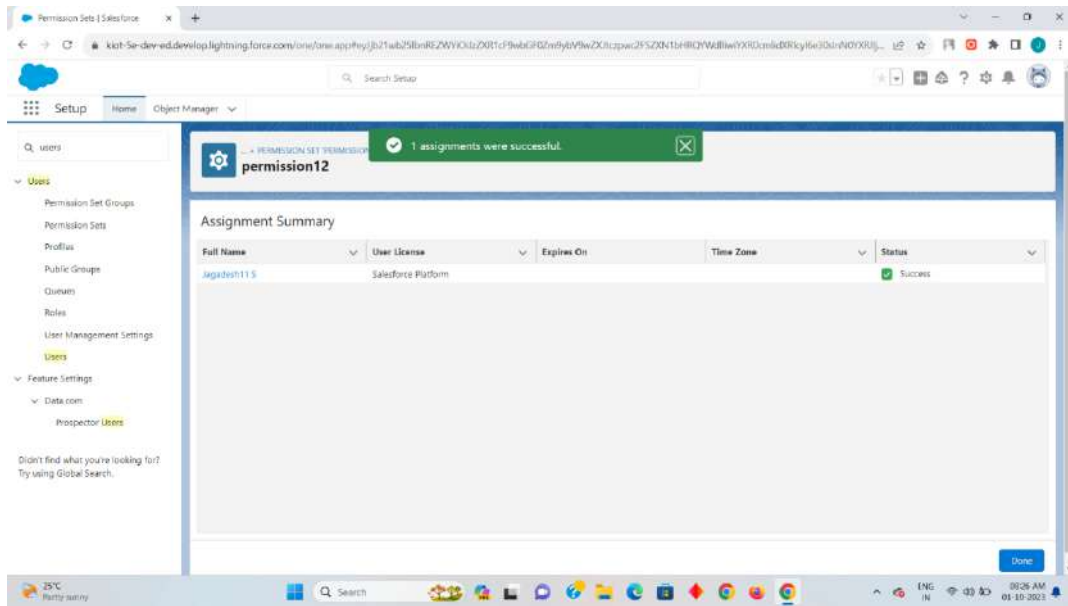




Click on next.



Now click on Assign.



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

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

Solution:

Step 1: Create a Custom Object

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

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

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

Quick Find

8 Items, Sorted by

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.

The screenshot shows the 'Email Template - Thank You Email - Survey' interface. At the top, there are tabs for 'Details' and 'Related', with 'Details' selected. Below this is the 'Information' section, which contains fields for 'Email Template Name' (Thank You Email - Survey), 'Description', 'Related Entity Type' (Survey Result), 'Folder' (Public Email Templates), and a checkbox for 'Made in Email Template Builder' (checked). The 'Message Content' section follows, with fields for 'Subject' (Thank You For Completing Our Survey!), 'Enhanced Letterhead', and 'HTML Value'. The 'HTML Value' field contains a preview of the email content, including a greeting, a thank-you message, and a signature. At the bottom is the 'Additional Information' section, which shows 'Created By' (Rakesh Gupta, 12/21/2020, 4:23 PM) and 'Last Modified By' (Rakesh Gupta, 12/21/2020, 4:32 PM).

Email Template - Thank You Email - Survey	
Edit in Builder Edit Clone	
Details Related	
Information	
Email Template Name	Related Entity Type
Thank You Email - Survey	Survey Result
Description	Folder
	Public Email Templates
Made in Email Template Builder	
<input checked="" type="checkbox"/>	
Message Content	
Subject	Enhanced Letterhead
Thank You For Completing Our Survey!	
HTML Value	
<p>Hi {{{Survey_Result__c.Name__c}}},</p> <p>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.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>	
Additional Information	
Created By	Last Modified By
Rakesh Gupta, 12/21/2020, 4:23 PM	Rakesh Gupta, 12/21/2020, 4:32 PM

Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.
3. Select **Email Alerts**, click on the **New**

Email Alert button.

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

Edit Email Alert

Survey - Thank You Email

Help for this Page

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

Object

Survey Result

Email Template

Thank You Email - Survey

Protected Component

☐

Recipient Type

Search: User for: Find

Recipients

Available Recipients

User: Integration User
User: Rakesh Gupta
User: Security User

Add
Remove

Selected Recipients

Email Field: Email

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.

Save Save & New Cancel

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

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

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

1. Drag-and-drop the **Create Records** element onto the Flow designer.
2. Enter a name in the **Label (Save Response)** field; the **API Name** will auto-populate.
3. For **How Many Records to Create** – select **One**.

4. For **How to Set the Record Fields**
 - select **Use separate resources, and literal values.**
5. Select the **Survey_Result__c** object from the dropdown list.
6. **Set Field Values for the Survey Result**
 1. Row 1:
 1. **Field: Comment__c**
 2. **Value: {!Comment}**
 2. Click **Add Row**
 3. Row 2:
 1. **Field: Email__c**
 2. **Value: {!Email.value}**
 4. Click **Add Row**
 5. Row 3:
 1. **Field: Name__c**
 2. **Value: {!Name.firstName}
 {!Name.lastName}**
 6. Click **Add Row**
 7. Row 3:
 1. **Field: Rating__c**
 2. **Value: {!Rating}**
7. Click **Done.**

Edit Create Records

Create Salesforce records using values from the flow.

* Label * API Name

Description

How Many Records to Create

☒ One

☐ Multiple

How to Set the Record Fields

☐ Use all values from a record

☒ Use separate resources, and literal values

Create a Record of This Object

* Object

Set Field Values for the Survey Result

Field	←	Value		
<input type="text" value="Comment__c"/>	←	<input type="text" value="A Comment"/>	X	<input type="button" value="🗑"/>
Field	←	Value		
<input type="text" value="Email__c"/>	←	<input type="text" value="A Email > Value"/>	X	<input type="button" value="🗑"/>
Field	←	Value		
<input type="text" value="Name__c"/>	←	<input type="text" value="{!Name.firstName} {!Name.lastName}"/>		<input type="button" value="🗑"/>
Field	←	Value		
<input type="text" value="Rating__c"/>	←	<input type="text" value="A Rating"/>	X	<input type="button" value="🗑"/>

☐ Manually assign variables

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

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

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

You Email.

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

The screenshot shows a configuration window titled "Edit 'Survey - Thank You Email' email alert". It contains a description field, a "Set Input Values" section with a "Record ID" field containing "{!Save_Response}", and "Cancel" and "Done" buttons at the bottom right.

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: Send Thank You Email

* API Name: Send_Thank_You_Email

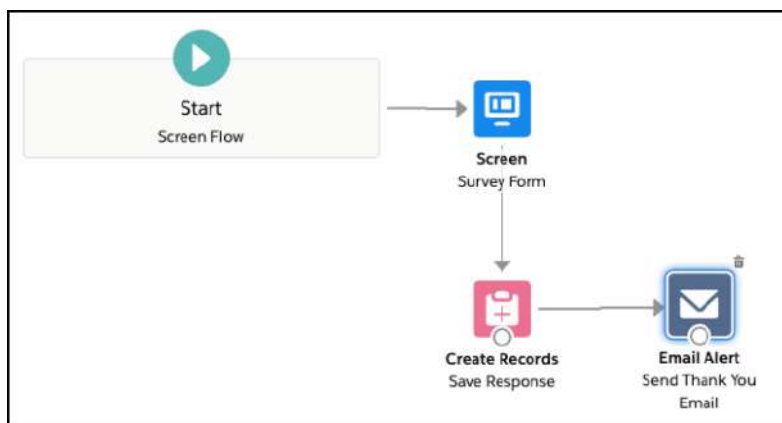
Description:

Set Input Values

A₃ * Record ID: {!Save_Response}

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

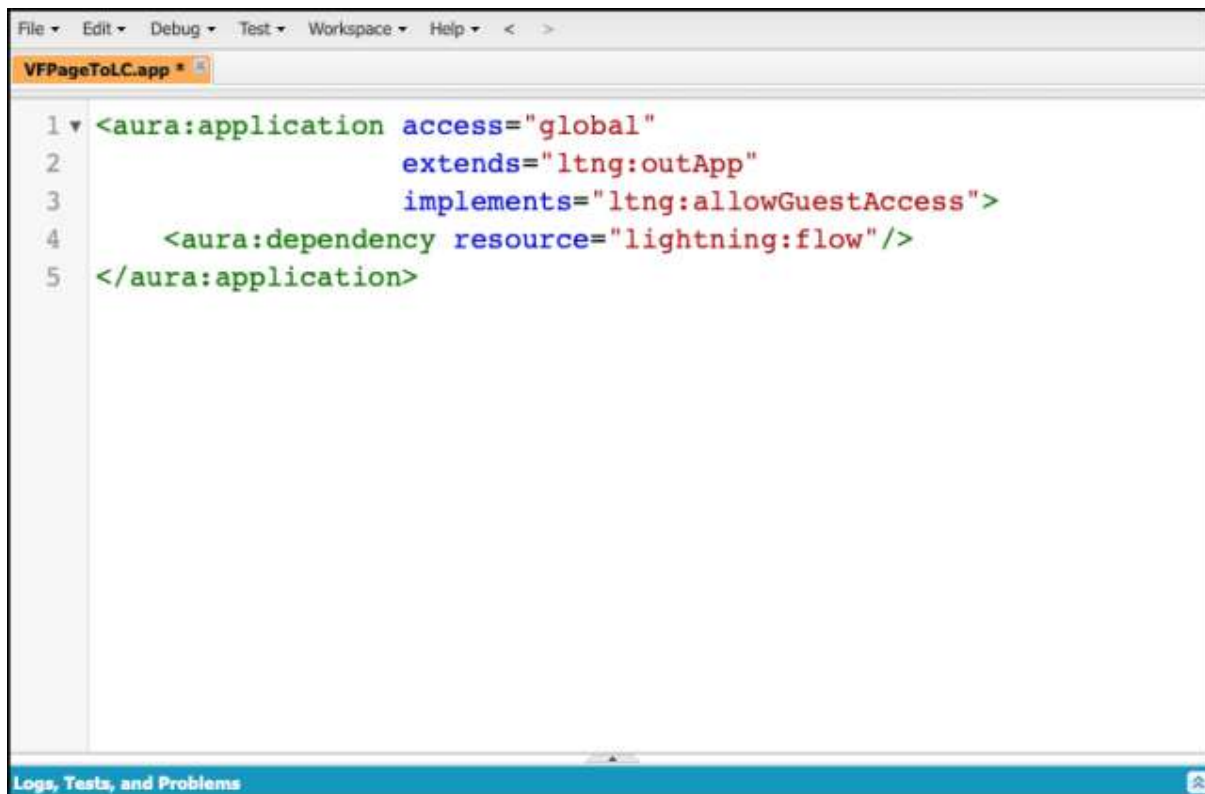
Cancel

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



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

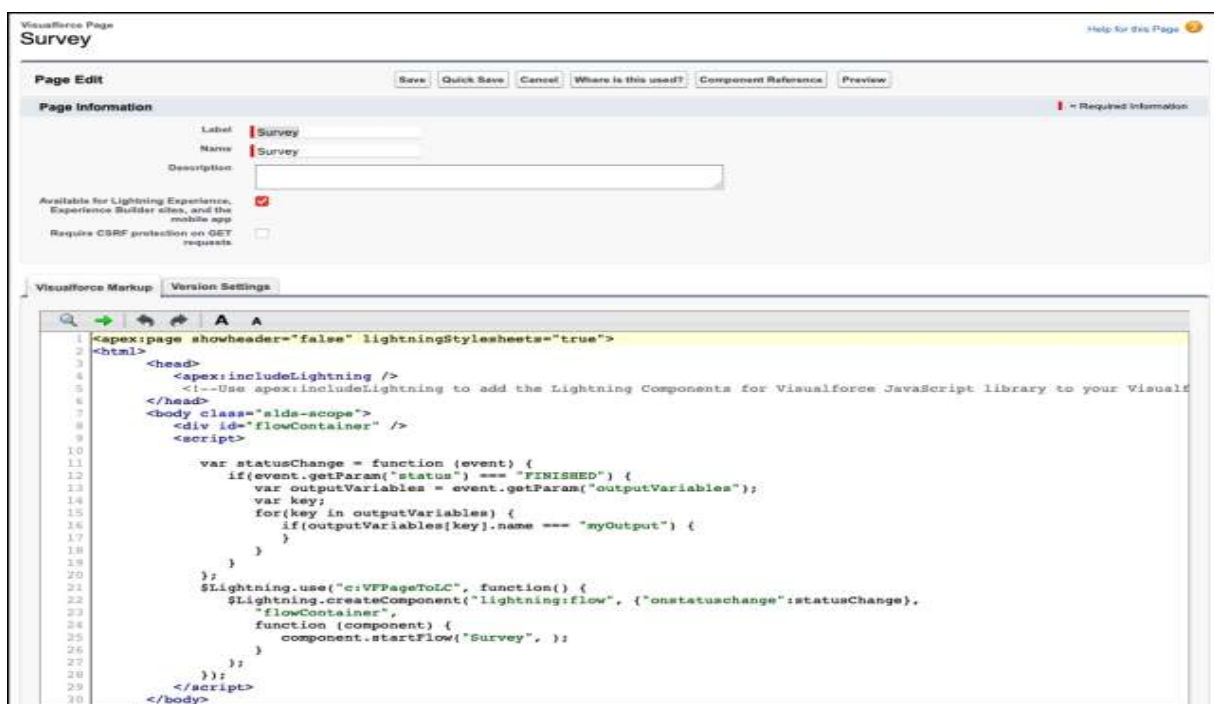
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

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

function that creates the component on the page using **\$Lightning.createComponent()**

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



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

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

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

The screenshot shows the 'Site Edit' form in Salesforce. The form is titled 'Site Edit' and has 'Save' and 'Cancel' buttons at the top right. The form contains the following fields and values:

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

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.

Thank You For Completing Our Survey!

Survey Site Guest User

via b99amc6fe77-b-cdzwnaa-gs0.bnc.salesforce.com

8:09 PM (1 minute ago)

to me

Hi Alok Sinfal,

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

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

Thanks,
Automation Champion

Reply

Forward