

**Naan Mudhalvan  
Salesforce  
Developer(Course)  
Assignment no 1**

**Name : M.Bhuvaneshwari  
Naan Mudhalvan id :  
au611420104010  
Year & Dep : 4<sup>th</sup> year & CSE  
Batch : 2024  
Zone no : Zone 8**

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

Solution:

Step 1: Create Custom Objects

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

**New Custom Object**

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

**Custom Object Definition Edit**

**Custom Object 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	<input type="checkbox"/>		

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

Object Name	College	Example:	Account
-------------	---------	----------	---------

Description

Context-Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name

Record Name

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

Optional Features

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

Object Classification

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

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

Deployment Status

In Development

What is this?

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

**Help for this Page**

Save | Save & New | Cancel

# Second custom objects, let's call them "Department\_C"

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A message at the top indicates that permissions for the object are disabled by default. The 'Custom Object Definition Edit' page is displayed, with the 'Custom Object Information' section active. The object name is set to 'College\_c'. Other fields include 'Label' (department), 'Plural Label' (departments), and 'Description'. The 'Content Name' field is set to 'None'. Under 'Optional Features', 'Allow Sharing' is checked. In the 'Deployment Status' section, 'Deployed' is selected. The 'Search Status' section has 'Allow Search' unchecked. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

## Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College\_c" to open its settings.

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

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

**Header:** Search Setup, Setup, Home, Object Manager

**Breadcrumbs:** SETUP > OBJECT MANAGER CDepartment

**Left Sidebar (Details):**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

**Right Panel (Details):**

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

**Buttons:** Edit, Delete

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

**Header:** Search Setup, Setup, Home, Object Manager

**Breadcrumbs:** SETUP > OBJECT MANAGER CDepartment

**Left Sidebar (Details):**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

**Central Panel (New Relationship):**

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

Help for this Page Step 3 of 6

Field Label: college

Field Name: college

Description:

Help Text:

Child Relationship Name: CDepartments

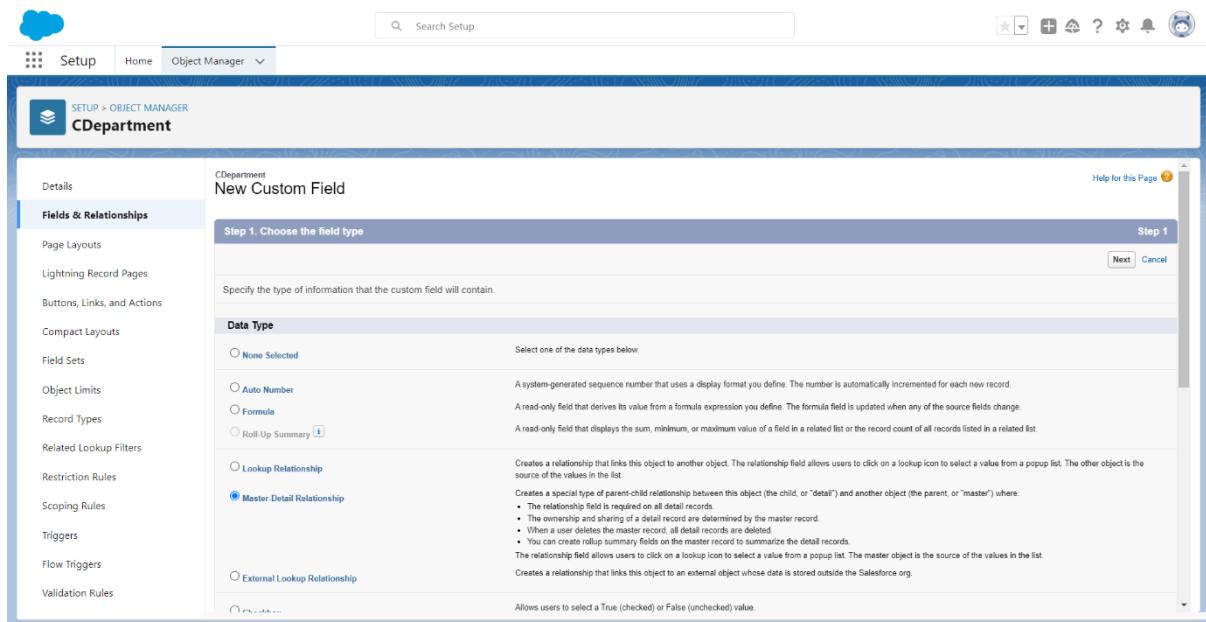
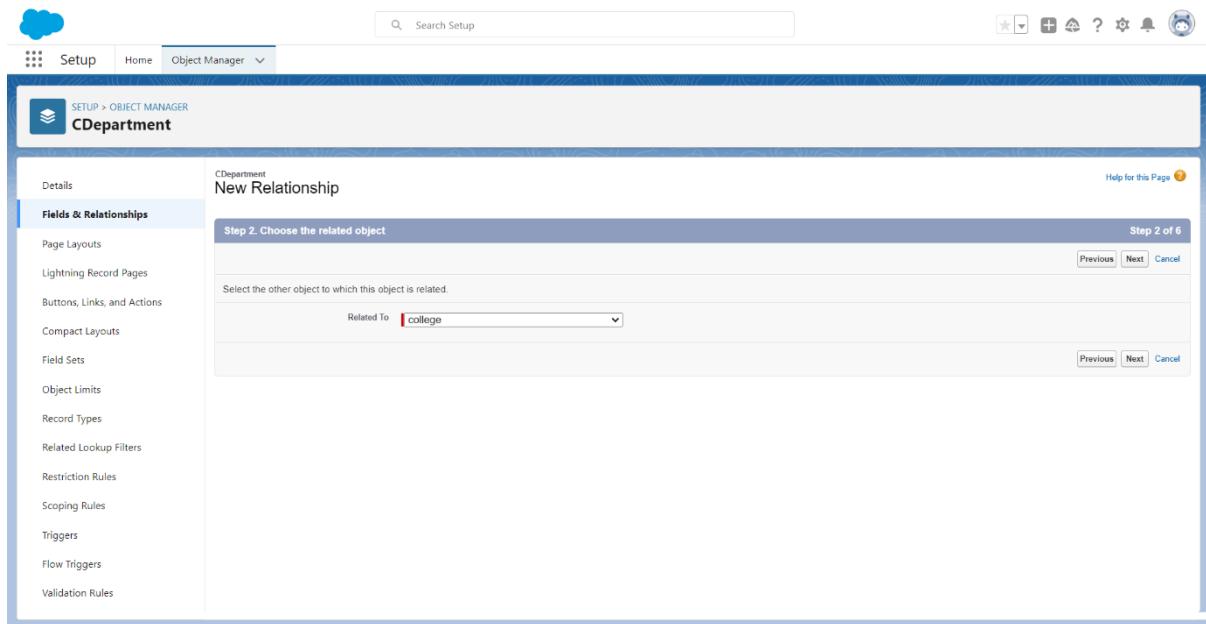
Sharing Setting:

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

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

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

**Buttons:** Previous, Next, Cancel



## Step 3: Create the Roll-Up Summary Field

**Now, let's create a Roll-Up Summary Field on the "College\_C" to calculate the total number of related records in "Department\_C":**

1. Still on the "College\_c" settings, go to "Fields & Relationships."

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

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'CDepartment' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Fields & Relationships' and displays a table with four items:

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)		✓

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. The left sidebar has a 'User Interface' category expanded, showing 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'Custom Tabs' and contains the following information:

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**

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

**Web Tabs**

No Web Tabs have been defined.

**Visualforce Tabs**

No Visualforce Tabs have been defined.

**Lightning Component Tabs**

No Lightning component tabs have been defined.

**Lightning Page Tabs**

No Lightning Page Tabs have been defined.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being created is 'college'. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main panel is titled 'New Custom Field' and is on 'Step 5 of 5: Add to page layouts'. The field details are: Field Label: 'Total count', Data Type: 'Roll-Up Summary', Field Name: 'Total\_count', and Description: 'Total count'. Under 'Page Layouts', the 'college Layout' is selected. Buttons at the bottom include 'Previous', 'Save & New', 'Save', and 'Cancel'.

The screenshot shows the Salesforce Setup interface continuing the creation of the 'Total count' field. It is now on 'Step 4 of 5: Establish field-level security'. The field details remain the same. A table titled 'Field-Level Security for Profile' lists user profiles and their access levels. The table has columns for 'Visible' (checkbox) and 'Read Only' (checkbox). All profiles listed have both checkboxes checked. The profiles include: Analytics Cloud Integration User, Analytics Cloud Security User, Cloud Kicks Admin, Contact Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, and customer. Buttons at the bottom include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the 'college' object details page in the Salesforce setup. The left sidebar lists various configuration options under 'Fields & Relationships'. The main content area is titled 'New Custom Field' and is on 'Step 3 of 5'. It asks to 'Define the summary calculation'. The 'Master Object' is set to 'college' and the 'Summarized Object' is 'CDepartments'. The 'Select Roll-Up Type' section has 'COUNT' selected. Under 'Filter Criteria', the radio button for 'All records should be included in the calculation' is selected. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the 'college' object details page in the Salesforce setup. The left sidebar lists various configuration options under 'Fields & Relationships'. The main content area is titled 'New Custom Field' and is on 'Step 2 of 5'. It asks to 'Enter the details'. The 'Field Label' is 'Total count', 'Field Name' is 'Total\_count', and there is a large empty 'Description' field. Below these fields is a 'Help Text' input field. A checkbox 'Auto add to custom report type' is checked, and another checkbox 'Add this field to existing custom report types that contain this entity' is also checked. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

**college** 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.
- Roll-Up Summary 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.
- 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.
  - The relationship field is required on all detail records.
  - The relationship field and all detail records 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.
- Master-Detail Relationship 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.
- Formula Allows users to select a True (checked) or False (unchecked) value.

**Fields & Relationships**  
4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User;Group)		✓

## Step 4: Create a Lightning App

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

**Developer Name, Description).**

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

Setup Home Object Manager

Search Setup

User Interface

Rename Tabs and Labels

Tabs

New Custom Object Tab

Step 2 of 3

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

Apply one tab visibility to all profiles Default On

Apply a different tab visibility for each profile

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

Previous Next Cancel

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main content area is titled 'New Custom Object Tab' and is divided into three steps. Step 1, 'Enter the Details', is active. It allows users to choose a custom object ('Object' dropdown set to 'college') and a tab style ('Tab Style' dropdown set to 'Jewel'). A note indicates that a splash page can be chosen. Step 2, 'Customize the Tab', is shown below with a preview of the tab labeled 'college'. Step 3, 'Add to Custom Apps', is also visible. The top navigation bar includes links for Home, Object Manager, and various system icons.

The screenshot shows the 'Step 3, Add to Custom Apps' page. It lists various custom apps and their visibility status relative to the new tab. A checkbox 'Include Tab' is checked for all listed apps. The apps include Platform, Sales, Service, Marketing, Sample Console, High Volume Customer Portal User, Authenticated Website User, App Launcher, Community, Site.com, Salesforce Chatter, Content, Analytics Studio, Sales Console, Service Console, Sales, Lightning Usage API, Digital Experiences, Queue Management, Data Manager, Bolt Solutions, and Salesforce Scheduler Setup. A note at the bottom states 'Append tab to users' existing personal customizations'. The top navigation bar is identical to the previous screenshot.

**New Custom Object Tab**

Step 1. Enter the Details Step 1 of 3

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

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

Object	CDepartment
Tab Style	Lightning

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

Splash Page Custom Link: [None](#)

Description:

Next Cancel

**Lightning Experience App Manager**

20 items • Sorted by App Name • Filtered by All appnamesitems - TabSet Type

App Name	Developer Name	Description	Last Modified Date	App ...	Visi...
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	14/07/2023, 10:47 am	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14/07/2023, 10:47 am	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	14/07/2023, 10:47 am	Classic	✓
AppExchange Marketplace					
Connected Apps					
Connected Apps OAuth Usage					
Manage Connected Apps					
Community	Community	Salesforce CRM Communities	14/07/2023, 10:47 am	Classic	✓
Content	Content	Salesforce CRM Content	14/07/2023, 10:47 am	Classic	✓
Flow Category					
Lightning Bolt					
Lightning Bolt Solutions					
Mobile Apps					
Salesforce					
Salesforce Branding					
Salesforce Navigation					
Salesforce Notifications					
Salesforce Offline					
Salesforce Settings					
Packaging					
Installed Packages					

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

- Header:** Includes a cloud icon, the word "Setup", and navigation links for "Home" and "Object Manager".
- Search Bar:** A search bar with the placeholder "Search Setup".
- Tool Buttons:** Standard setup tool buttons.
- Left Sidebar:** A sidebar titled "User Interface" with a "Tabs" section. It includes a search bar for "tabs", a link to "Rename Tabs and Labels", and a note: "Didn't find what you're looking for? Try using Global Search."
- Main Content Area:** The "Tabs" page under "SETUP".
  - Custom Tabs:** A section with a note: "You can create new custom tabs to extend Salesforce functionality or to build new application functionality." It describes Custom Object tabs, Web tabs, Visualforce tabs, Lightning Component tabs, and Lightning Page tabs.
  - Custom Object Tabs:** A table listing custom object tabs.

Action	Label	Tab Style	Description
Edit   Del	Book1	Box	
Edit   Del	CDepartments	Lightning	
Edit   Del	colleges	Jewel	
Edit   Del	Research Proposal	Square	
Edit   Del	student	Box	
  - Web Tabs:** A section stating "No Web Tabs have been defined".
  - Visualforce Tabs:** A section stating "No Visualforce Tabs have been defined".
  - Lightning Component Tabs:** A section stating "No Lightning component tabs have been defined".
  - Lightning Page Tabs:** A section stating "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 Departments student Content

Search...

New Contact Edit New Opportunity

Related Details

college Name  
**mecw**

Total count  
2

phone  
[9087116402](#)

Email  
[kiot@gmail.com](mailto:kiot@gmail.com)

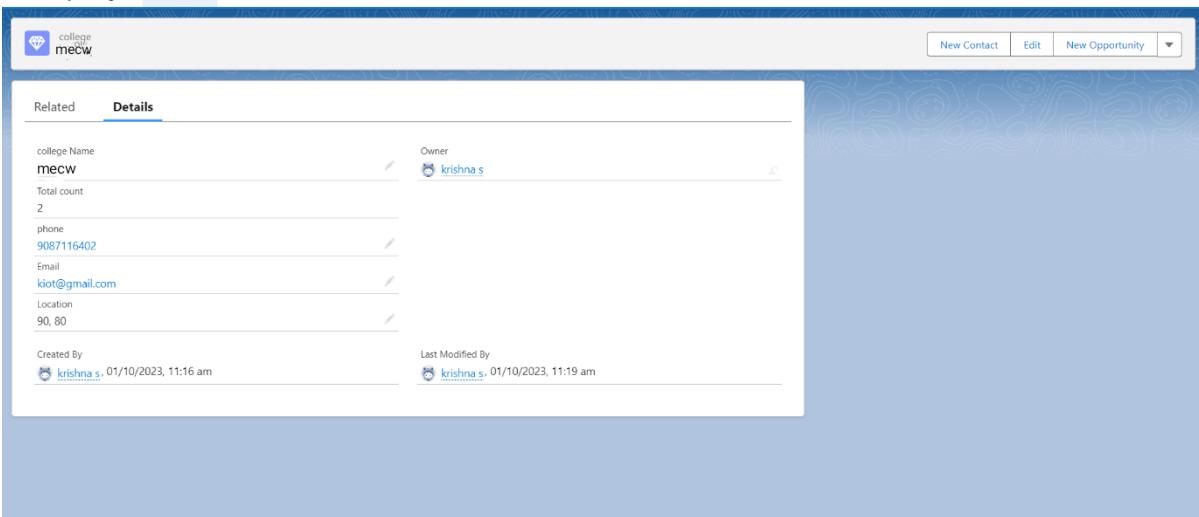
Location  
90, 80

Owner  
 krishna.s

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

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

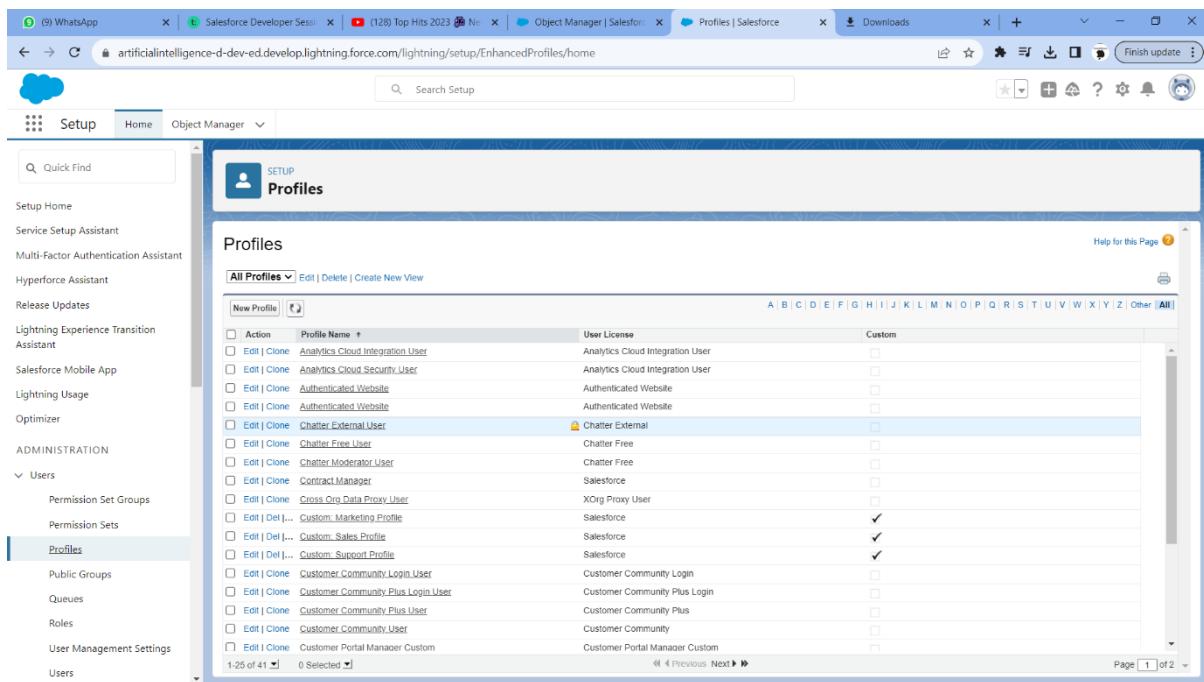
History



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.



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main area displays a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains checkboxes, many of which are checked for certain profiles. The profiles listed include: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Chatter External User, Chatter Free User, Chatter Moderator User, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, Custom Sales Profile, Custom Support Profile, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, and Customer Portal Manager Custom. The 'User License' column lists various license types such as Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter External, Chatter Free, Chatter Moderator, Contract Manager, Cross Org Data Proxy User, Salesforce, XOrg Proxy User, and Customer Community.

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users). The main content area displays a table titled "Profiles" with the following data:

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

At the bottom, there are navigation links for "1 of 7" and "0 Selected", and a "Page 1 of 1" indicator.

The screenshot shows the "Clone Profile" dialog box. The left sidebar is identical to the previous screenshot. The dialog has a header "Clone Profile" and a sub-header "Enter the name of the new profile." It contains a note "You must select an existing profile to clone from." Below this, there are two columns: "Existing Profile" (Standard Platform User) and "User License" (Salesforce Platform). A "Profile Name" input field is present, containing a redacted value. At the bottom are "Save" and "Cancel" buttons.

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F\_ui%2Fperms%2Fu%2Fprofile%2FProfileClone%2Fe... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | X | Finish update

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

## Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e500000WQ8z%3Fsetupid%3DEnhancedProfiles | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | X | Finish update

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

Profiles

## Manager

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

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

Profile Detail

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

Page Layouts

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQbz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads

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

Manager

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	Manager	User License	Salesforce Platform	Description	Custom Profile
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
slot (slot)	<input checked="" type="checkbox"/>	<input type="radio"/>			

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

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

**Communication Subscription Channel Types**

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

**Communication Subscription Consents**

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

**Communication Subscription Timings**

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

**Contacts**

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

**Contact Point Addresses**

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

**Contact Point Consents**

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

**Contact Point Emails**

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

**Custom Object Permissions**

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j0000WQbz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads

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

Manager

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	Manager	User License	Salesforce Platform	Description	Custom Profile
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
slot (slot)	<input checked="" type="checkbox"/>	<input type="radio"/>			

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

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

**Communication Subscription Channel Types**

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

**Communication Subscription Consents**

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

**Communication Subscription Timings**

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

**Contacts**

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

**Contact Point Addresses**

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

**Contact Point Consents**

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

**Contact Point Emails**

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

**Custom Object Permissions**

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

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads

Finish update

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

Profiles

Contact Point Addresses Contact Point Consents Contact Point Emails Sellers Streaming Channels User External Credentials

Custom Object Permissions

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

	Basic Access	Create	Edit	Delete	View All	Modify All
Enhancement Requests	<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

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads

Finish update

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

Profiles

Contact Point Addresses Contact Point Consents Contact Point Emails Sellers Streaming Channels User External Credentials

Custom Object Permissions

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

	Basic Access	Create	Edit	Delete	View All	Modify All
Enhancement Requests	<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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQbz%2Fe%3FrerURL%3D%252F00e5j0... | Profiles | Salesforce

## Profiles

Custom Object Permissions

	Basic Access	Create	Edit	Delete	View All	Modify All	Basic Access	Create	Edit	Delete	View All	Modify All
Bank	<input checked="" 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"/>					

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:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home | Users | Salesforce

## Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users | Edit | Create New | View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit   Login	Adanna_Diva	dadan	test_diva_nas_4x8byvbd9wtk_ts2jrg3kxxpx_3qj8of0y2wns_hi43tkzv6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UAMS User
<input type="checkbox"/>   Edit	Chatter Export	Chatter	chatty_00d500000bcsskeap.ko0famr0jite@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit   Login	Ellington_Amelia	aelli	amelia.ellington.1.46kxcpg0odih_d6cypdcuo4wh_hnbdewywheno_wguctor1daly@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	S_GOPAL	GS	k0t520@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	User_Integration	integ	integration@0004500000bcsskeap.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightsecurity@000500000bcsskeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

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 | Data | Email | PLATFROM TOOLS | Apps | Feature Corrections

Salesforce Developer Session | Object Manager | Salesforce | Users | Salesforce | Downloads

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: [ ] Role: <None Specified>

Last Name: [ ] User License: Salesforce Integration

Alias: [ ] Profile: Salesforce API Only System Integrations

Email: [ ] Active:

Username: [ ] Marketing User:

Nickname: [ ] Offline User:

Title: [ ] Knowledge User:

Company: [ ] Flow User:

Department: [ ] Service Cloud User:

Division: [ ] Site.com Contributor User:

Data.com User Type: [None] Site.com Publisher User:

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

Accessibility Mode (Classic Only):  High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:  Debug Mode:

Help for this Page

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lighting Usage Optimizer ADMINISTRATION > Users > Data > Email > Apps > Feature Settings

Salesforce Developer Session | Object Manager | Salesforce | Users | Salesforce | Downloads

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: Sowmya Role: <None Specified>

Last Name: bela User License: Salesforce Platform

Alias: sbala Profile: Manager

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

Username: 2k21t@kiot.ac.in Marketing User:

Nickname: User169616771282564526 Offline User:

Title: worker Knowledge User:

Company: kiot bank Flow User:

Department: Service Cloud User:

Division: Site.com Contributor User:

Data.com User Type: [None] Site.com Publisher User:

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

Accessibility Mode (Classic Only):  High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:  Debug Mode:

Help for this Page

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lighting Usage Optimizer ADMINISTRATION > Users > Data > Email > Apps > Feature Settings

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with various links like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, etc. The main area is titled 'Users' and shows a user detail page for 'sowmya bala'. The user's name is listed as 'sowmya bala' with an alias 'stala'. The email is '2k20case179@kiot.ac.in'. The profile is set to 'Manager'. The user is active and assigned to the 'Marketing User' role. Other tabs like 'Sharing', 'Reset Password', 'Login', and 'Freeze' are visible at the top of the form.

The screenshot shows a Gmail inbox with 5,318 messages. A new message from 'support@salesforce.com' is highlighted. The subject is 'Welcome to Salesforce!' and the body contains a welcome message, a 'Verify Account' button, and a URL: <https://artificialintelligence-d-dev-ed-develop.my.salesforce.com>. The URL is also copied to the clipboard. The message was sent at 7:13 PM (0 minutes ago).

(9) WhatsApp | (1) Salesforce Dev | (128) Top Hit | (1) Object Mana... | (1) Users | Sales... | (1) Downloads | (1) Welcome to... | (1) Recently Viewed | (1) Change Your... | + | - | X

Finish update

 salesforce

### Change Your Password

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

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
In what city were you born?

\* Answer  
salem

Change Password

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

Login | Salesforce

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

Finish update

 salesforce

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

WATCH ON DEMAND

AI Day

Username  
2k21it@kiot.ac.in

Password  
.....

Log In

Remember me

Forgot Your Password?

© 2023 Salesforce, Inc. All rights reserved.

Recently Viewed | Bank | Salesfo... +

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

MECW

mecw - Bank customers Home

Bank Recently Viewed

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

Bank Name ↓

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

Display Density

✓ Comfy

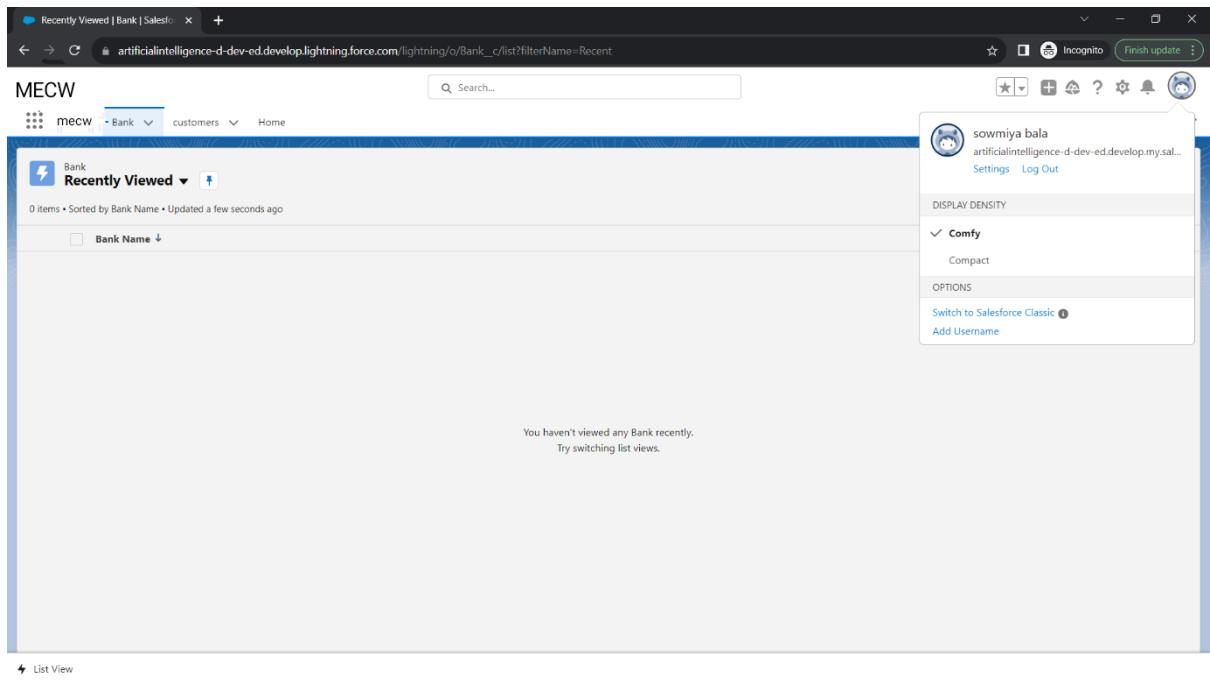
Compact

Options

Switch to Salesforce Classic

Add Username

List View



New Bank | Salesforce +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank\_\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=16...

meew - Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

Information

\* = Required Information

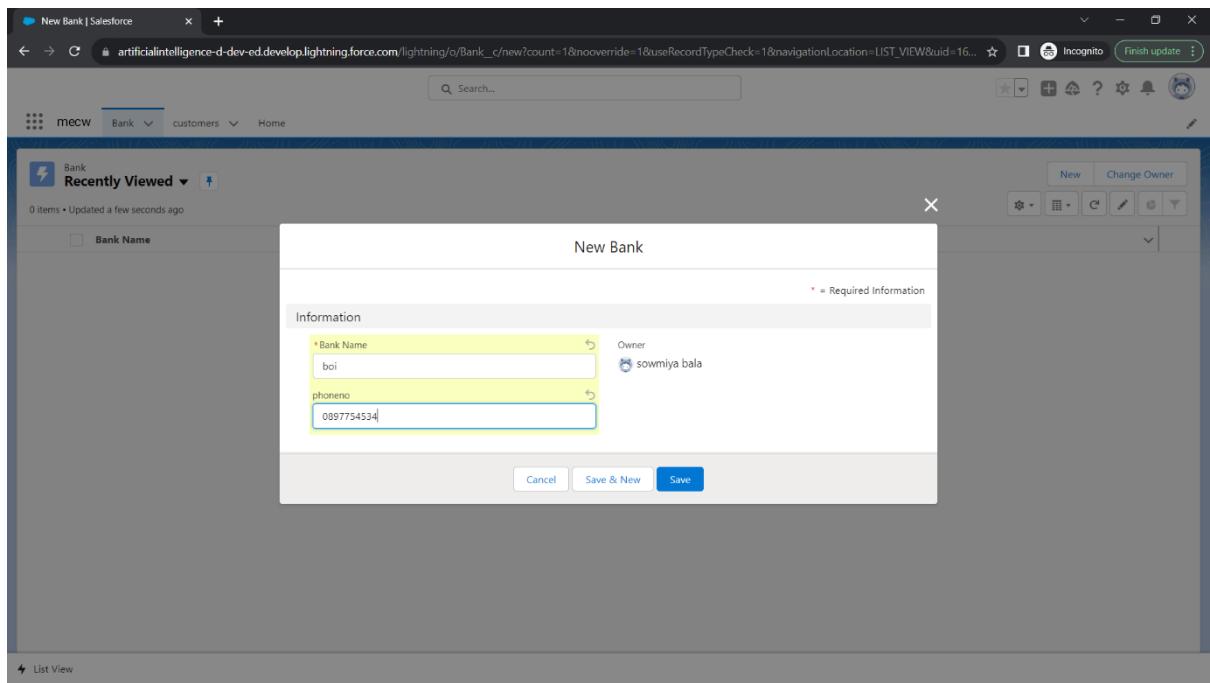
Bank Name: boi

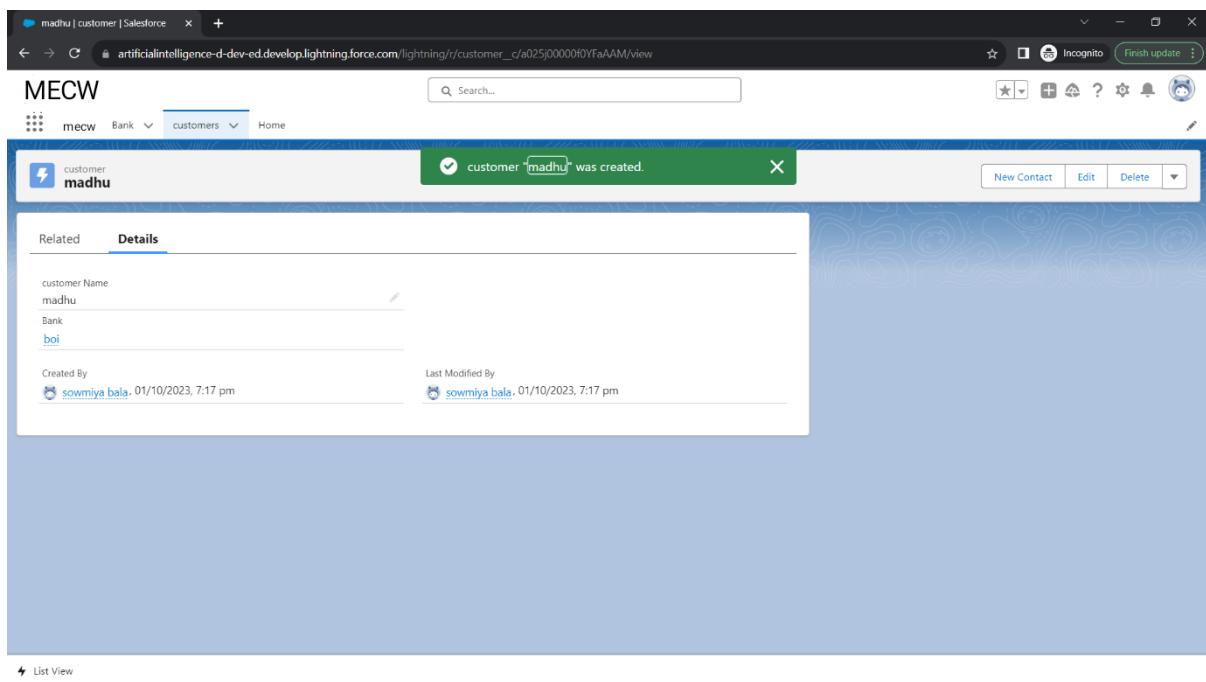
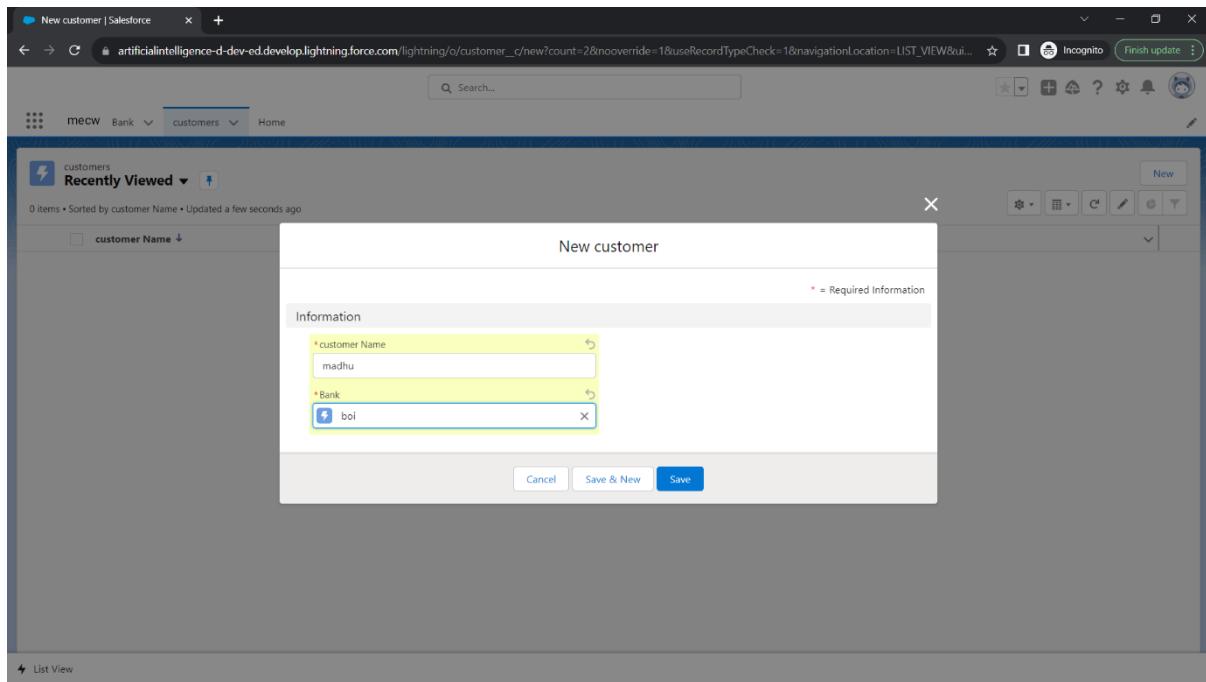
Owner: sowmiya bala

phoneno: 0897754534

Cancel Save & New Save

List View





Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

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

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

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

Help for this Page

1.7 of 7 0 Selected | Page 1 of 1

```
javascript:arcUp(%27%2F_ui%2fperms%2Fu%2fprofile%2fProfileClone%2Fe%3Fd%3D00e5j00003uvKu%26setupid%3DEnhancedProfiles%26retURL%3D%252F00e%253Fcf%253D0089j00000CtU%2526roleIndex%253D18%2526page%253D1%2526editP%253D91%26editP%
```

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard Platform User  
User License: Salesforce Platform  
Profile Name: salesmanager

Save Cancel

Salesforce Developer Session 2 | (128) Top Hits 2023 | Profiles | Salesforce | Welcome to Salesforce: Verify your setup update

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

Profile salesmanage

Profile Detail

Name	salesmanage	User License	Salesforce Platform	Description	Created By	Modified By
					GOPAL_S_01/10/2023, 7:19 pm	GOPAL_S_01/10/2023, 7:19 pm

Page Layouts

Standard Object Layouts	Global	Operating Hours
Email Application	Global Layout [View Assignment]	Order Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product Layout [View Assignment]
Account	Account Layout [View Assignment]	Payment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
Appointment Invitation	Appointment invitation Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Gateway Layout [View Assignment]

Salesforce Developer Session 2 | (128) Top Hits 2023 | Profiles | Salesforce | Welcome to Salesforce: Verify your setup update

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

Profile Edit salesmanage

Profile Edit

Name	salesmanage	User License	Salesforce Platform	Description	Custom Profile
------	-------------	--------------	---------------------	-------------	----------------

Custom App Settings

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

Service Provider Access

Tab Settings

Standard Tab Settings

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

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your...

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

Profiles

Contact Point Emails User External Credentials

Custom Object Permissions

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

Enhancement Requests

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 assets	Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails	<input type="checkbox"/>	<input type="checkbox"/>

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your...

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

Profiles

Contact Point Emails User External Credentials

Custom Object Permissions

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

Enhancement Requests

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 assets	Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails	<input type="checkbox"/>	<input type="checkbox"/>

Save | Save & New | Cancel

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po | Users | Salesforce | Welcome to Salesforce: Verify yo | + | Finish update

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit Save Save & New Cancel

General Information

First Name:  (Required)

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Company:

Department:

Division:

Role: <None Specified>

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: Default Limit (300)

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Help for this Page

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po | Users | Salesforce | Welcome to Salesforce: Verify yo | + | Finish update

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit Save Save & New Cancel

General Information

First Name: madhu  (Required)

Last Name: b

Alias: mb

Email: 2k20cse179@kiot.ac.in

Username: 2k20cse179@kiot.ac.in

Nickname: User169616842428654192

Title: worker

Company: kiot bank

Department: Sales

Division:

Role: <None Specified>

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: Default Limit (300)

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Help for this Page

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify yo... | + | Finish update

The screenshot shows the Salesforce Setup interface with the 'User Management Settings' section selected under 'Users'. The main content area displays the 'Users' configuration page, which includes fields for 'Mailing Address' (Street, City, Zip/Postal Code, State/Province, Country), 'Single Sign On Information' (Federation ID), 'Locale Settings' (Time Zone set to '(GMT+05:30) India Standard Time (Asia/Kolkata)', Locale set to 'English (India)', Language set to 'English'), and 'Approver Settings' (Delegated Approver, Manager, Receive Approval Request Emails set to 'Only if I am an approver', and a checked checkbox for 'Generate new password and notify user immediately').

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify yo... | + | Finish update

This screenshot is identical to the one above, but it includes specific address details in the 'Mailing Address' fields: Street is '4/184, anampalayam, utamasolapuram...', City is 'SALEM', Zip/Postal Code is '636308', State/Province is 'TAMIL NADU', and County is empty.

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify yo... | +

User Detail

Name	madhu b	Role	Active
Alias	mb	User License	<input checked="" type="checkbox"/>
Email	2k20csit79@kiot.ac.in [Verify]	Profile	<input checked="" type="checkbox"/>
Username	2k20csit@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User16961684242855419206	Offline User	<input type="checkbox"/>
Title	worker	Knowledge User	<input type="checkbox"/>
Company	kiot bank	Flow User	<input type="checkbox"/>
Department	Sales	Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	41/94, ammapalayam, umasalapuram .. Paraikkadu , salem- 606508 SALEM 635308 TAMIL NADU	Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input checked="" type="checkbox"/>
Language	English	Data.com User Type	<input checked="" type="checkbox"/>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager		Debug Mode	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/>
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator			

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify yo... | +

Welcome to Salesforce!

Click below to verify your account.

[Verify Account](https://artificialintelligence-d-dev-ed-develop.my.salesforce.com)

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

Username:  
`2k20csit@kiot.ac.in`

Again, welcome to Salesforce!

© Copyright 2000-2018 [salesforce.com](#), inc. All rights reserved. Various trademarks held by their respective owners.  
Salesforce.com, inc. The Landmark at One Market, Suite 300, San Francisco, CA, 94105, United States

Change Your Password | Salesforce

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

**salesforce**

## Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
In what city were you born?

\* Answer  
india

Change Password

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

Recently Viewed | Bank | Salesforce

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

## MECW

mecw Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

New

List View

Recently Viewed | customers | S | +

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

Incognito (3) Finish update

## MECW

meCW Bank customers Home

Search...

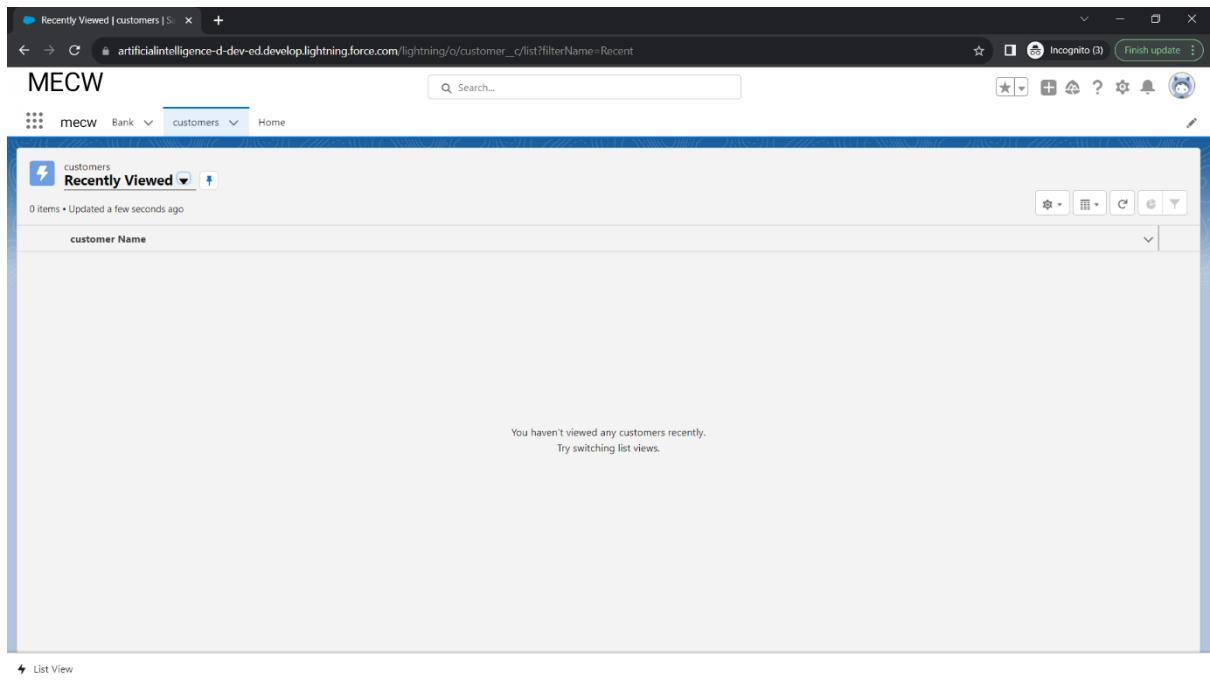
customers Recently Viewed 

0 items • Updated a few seconds ago

customer Name

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

List View



(9) WhatsApp | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Ve | Reset Password | Salesforce | +

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

Finish update

## Setup

Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

Permission Sets

Help for this Page

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

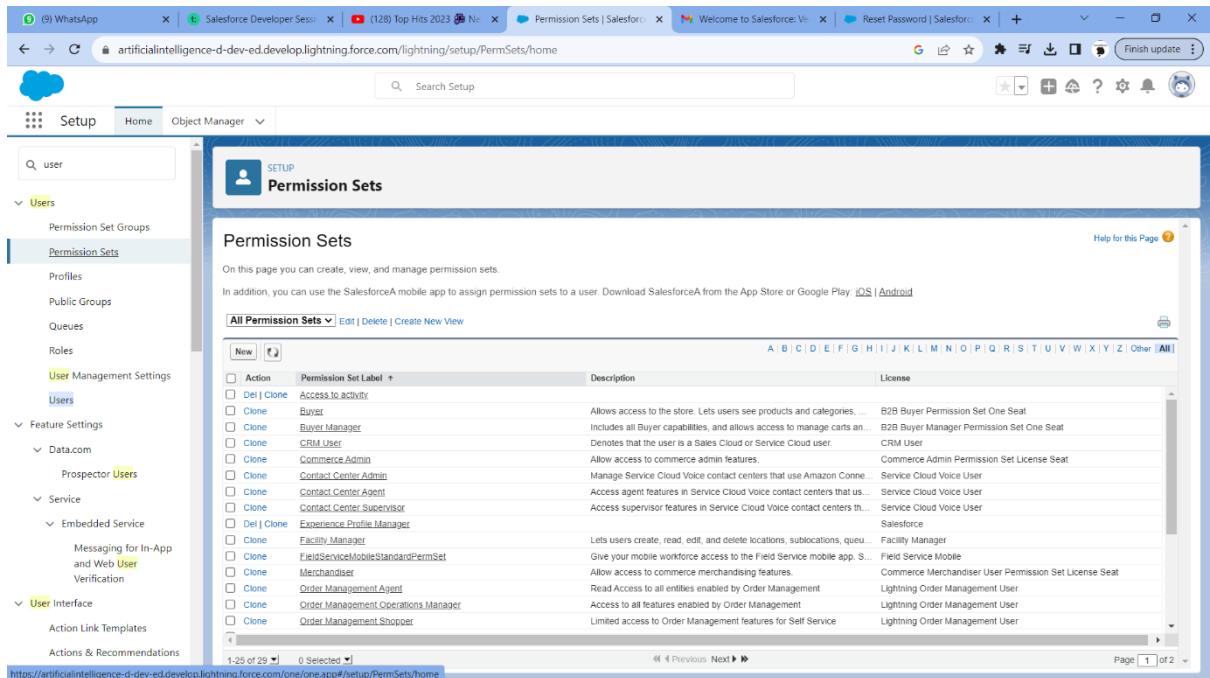
Action	Permission Set Label	Description	License
<input type="checkbox"/> Del   Clone	Access_to_Activity	Allows access to the store. Lets users see products and categories. ...	B2B_Buyer_Permission_Set_One_Seat
<input type="checkbox"/> Clone	Buyer	Includes all Buyer capabilities, and allows access to manage carts an...	B2B_Buyer_Manager_Permission_Set_One_Seat
<input type="checkbox"/> Clone	Buyer_Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM_User
<input type="checkbox"/> Clone	CRM_User	Allow access to commerce admin features.	Commerce_Admin_Permission_Set_License_Seat
<input type="checkbox"/> Clone	Commerce_Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service_Cloud_Voice_User
<input type="checkbox"/> Clone	Contact_Center_Admin	Access agent features in Service Cloud Voice contact centers that us...	Service_Cloud_Voice_User
<input type="checkbox"/> Clone	Contact_Center_Agent	Access supervisor features in Service Cloud Voice contact centers th...	Service_Cloud_Voice_User
<input type="checkbox"/> Clone	Contact_Center_Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Salesforce
<input type="checkbox"/> Del   Clone	Experience_Profile_Manager	Lets users create, read, edit, and delete locations, sublocations, queu...	Facility_Manager
<input type="checkbox"/> Clone	Facility_Manager	Give your mobile workforce access to the Field Service mobile app. B...	Field_Service_Mobile
<input type="checkbox"/> Clone	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce_Merchandiser_User_Permission_Set_License_Seat
<input type="checkbox"/> Clone	Merchandiser	Read Access to all entities enabled by Order Management	Lightning_Order_Management_User
<input type="checkbox"/> Clone	Order_Management_Agent	Access to all features enabled by Order Management	Lightning_Order_Management_User
<input type="checkbox"/> Clone	Order_Management_Operations_Manager	Limited access to Order Management features for Self Service	Lightning_Order_Management_User
<input type="checkbox"/> Clone	Order_Management_Shopper		

1-25 of 29  0 Selected 

Previous Next 

Page 1 of 2

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



## Step 2:

### Permission Sets:

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

### Object-Level Security:

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

### Record-Level Security:

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

### Ownership:

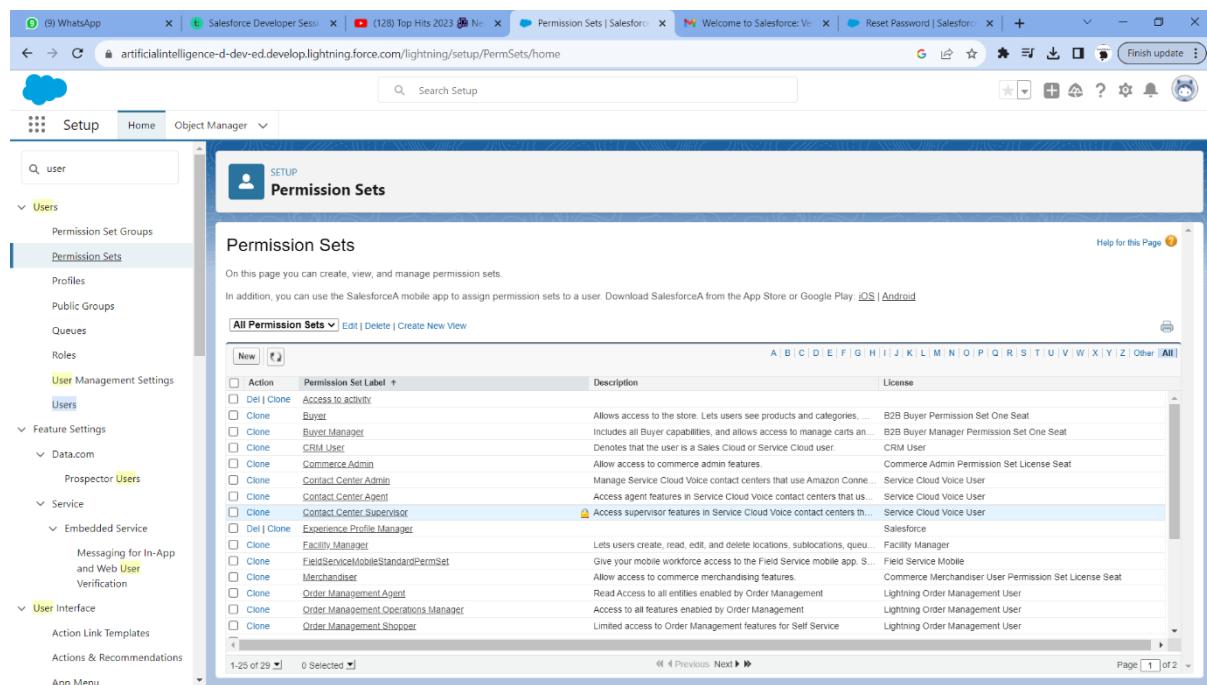
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## 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 with the following details:

- Page Title:** Permission Sets
- Section:** Permission Sets
- Table Headers:** Action, Permission Set Label +, Description, License
- Table Data:**

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Access to Activity	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	CRM User	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Commerce Admin	Manage Service Cloud Voice contact centers that use Amazon Conne...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Admin	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Allow access to Service Cloud Voice contact centers that use Amazon Con...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Salesforce
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Limited access to Order Management features for Self Service	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper		
- Page Navigation:** All Permission Sets, Edit | Delete | Create New View, New, Filter, Alphabetical (A-Z), Page 1 of 2

The screenshot shows the 'Permission Sets' page in the Salesforce Setup interface. The left sidebar is expanded, showing the 'Users' section under 'User Management Settings'. The main content area displays the 'Create' form for a new permission set. The 'Enter permission set information' section includes fields for 'Label' (empty), 'API Name' (empty), and 'Description' (empty). Below this, the 'Select the type of users who will use this permission set' section contains a note about license assignment and a dropdown for 'License' which is set to 'None'. At the bottom of the form are 'Save' and 'Cancel' buttons.

This screenshot is identical to the one above, but the 'Label' field now contains the value 'salesmanager'. All other fields and sections remain the same, including the 'Select the type of users who will use this permission set' section and the 'Save' and 'Cancel' buttons at the bottom.

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

**Permission Set Overview:**

Setting	Description	Value
Description		
License		
Session Activation Required	<input type="checkbox"/>	
Last Modified By	GOPALS_	01/10/2023, 7:29 pm
API Name	salesmanager	
Namespace Prefix		
Created By	GOPALS_	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.

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

**Object Settings:**

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assessments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invited	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

Permission Set: salesmanager

Object Permissions:

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

Field Permissions:

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

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

Permission Set: salesmanager

Object Permissions:

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

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

Search Setup

User salesmanager

Current Assignments

No assignments defined.

Cloud icon

Search bar

Left sidebar:

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

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

Search Setup

Select Users to Assign

All Users

1 item selected

Full Name ↑	All... ↓	Username	Role	Ac...	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9oodh.d6cwpdcu4wh.hnbdwvwvhwhq.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>		Force.com - App Subscription User
Chatter Expert	Chatter	chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>		Chatter Free User
Diya Adanna	dadan	test_diya_pas.4w8bjyb9wik.tszgrgsbkpx.3gi8ofovzwns.h43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>		UMS User
GOPAL S	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>		System Administrator
Integration User	integ	integration@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>		salesmanage
Security User	sec	insightssecurity@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>		Analytics Cloud Security User
sowmiya bala	sbala	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>		Manager

Search this list...

Cancel Next

Left sidebar (same as previous screen):

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

Salesforce Setup - User Management Settings - User Management Settings - Assignments

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

Time Zone: Select a time zone...

Selected Users:

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

Cancel Back Assign

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

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Salesforce Setup - User Management Settings - User Management Settings - Assignments

PERMISSION SET 'SALESMANAGER' assignments were successful.

Assignment Summary

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

Done

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

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Recently Viewed | customers | S | +

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

MECW

mechw Bank customers Home

Search...

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

LIST VIEW CONTROLS

New

- Clone
- Rename
- Sharing Settings
- Show List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

javascript:void(0)

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

Solution:

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

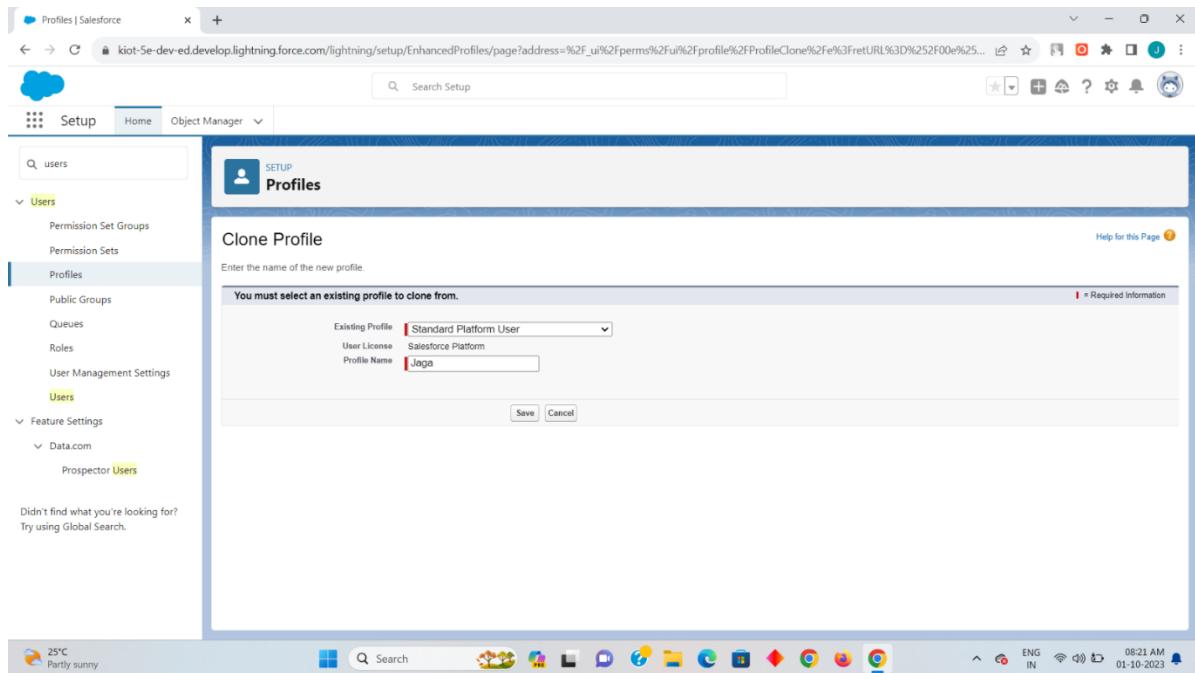
Setup-quick search[profile]

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar has sections for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. Under Users, 'Prospector Users' is selected. The main content area is titled 'Profiles' and shows a table of existing profiles. The columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The table includes profiles like 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External', etc. A search bar at the top says 'Search Setup'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>

## Step 2:

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



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

## Step 3:

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

The screenshot shows the 'Profiles' section of the Salesforce Setup. A specific profile named 'Jaga' is selected. The 'Profile Detail' section displays basic information: Name (Jaga), User License (Salesforce Platform), Description (empty), Created By (Jagadesh S), and Modified By (Jagadesh S). Under 'Page Layouts', it lists standard object layouts for various objects like Account, Contact, and Lead. The 'Custom Profile' checkbox is checked. The 'Edit' button is visible at the top right of the profile detail area.

This screenshot shows the continuation of the 'Profiles' setup page. It includes sections for 'Communication Subscriptions', 'Custom Object Permissions' (with tables for Providers and Resources), and 'Session Settings'. In the 'Session Settings' section, there are checkboxes for 'Separate Experience Cloud site and Salesforce login authentication for employees', 'Relax login IP restrictions', and 'Skip employee device activation during Experience Cloud site login'. The 'Basic Access' and 'Data Administration' checkboxes for various permissions are also visible.

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

Didnt find what you're looking for? Try using Global Search.

25°C Partly sunny

SETUP Profiles

Communication Subscription Consent Types

	Communication Subscription Consent Type	Communication Subscription Consents	Communication Subscription Timings	Locations	Party Consents	Push Topics	Sellers	Streaming Channels	User External Credentials
Comm	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark
Subsc	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark
Consent	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark
Timing	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark

Custom Object Permissions

Object	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Providers	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark
Resources	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark

Session Settings

Session Times Out After: 2 hours of inactivity

Enable different Experience Cloud login policies for employees.

Separate Experience Cloud site and Salesforce login authentication for employees.

Relax login IP restrictions

Skip employee device activation during Experience Cloud site login

Session Security Level Required at Login: None

25°C Partly sunny

ENG IN 08:21 AM 01-10-2023

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

Didnt find what you're looking for? Try using Global Search.

25°C Partly sunny

SETUP Profiles

Profile Edit Jaga

Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit

Name: Jaga

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

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

Service Provider Access

Tab Settings

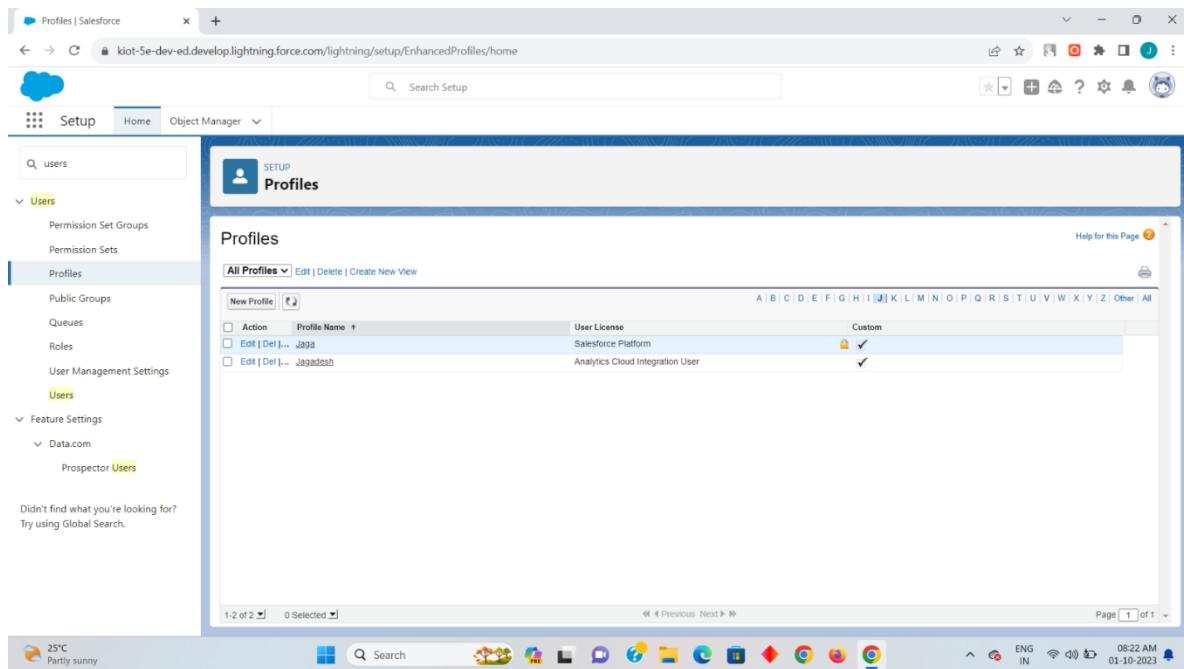
Overwrite users' personal tab customizations

25°C Partly sunny

ENG IN 08:21 AM 01-10-2023

## 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 managing Profiles. The left sidebar is collapsed, and the main content area is titled "Profiles". The URL in the browser bar is "kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home". The page displays a table of profiles, with one row selected:

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

Below the table, there are navigation links for "All Profiles", "Edit", "Delete", and "Create New View". A help link "Help for this Page" is also present. The bottom of the page includes standard Salesforce navigation and search controls.

## 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 been 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 is collapsed, and the main area displays the 'All Users' list. The list includes columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. Several users are listed, each with a checkbox and edit links. The profiles listed are Chatter Expert, Grey Jane, S.Jaga, S.Jagadesh, User\_Integration, and User\_Security. The 'Active' column shows checkboxes for most users, while the last two have empty boxes. The 'Profile' column lists various roles such as Chatter Free User, Customer Community User, Standard Platform User, System Administrator, Channel Sales Team, Analytics Cloud Integration User, and Analytics Cloud Security User. At the bottom of the list, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Users | Salesforce

Search Setup

## SETUP Users

New User

User Edit

General Information

First Name	Jagadesh11
Last Name	S
Alias	JS
Email	jwrt123@gmail.com
Username	jwrt123@gmail.com
Nickname	User169612675144962592
Title	
Company	
Department	
Division	

Role: Director, Channel Sales  
User License: Salesforce Platform  
Profile: -None-  
Active: -None-  
Marketing User: Standard Platform User  
Office User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type: -None-  
Data.com Monthly Addition Limit: Default Limit (300)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

Help for this Page

Did you find what you're looking for? Try using Global Search.

25°C Partly sunny

08:23 AM 01-10-2023

Users | Salesforce

Search Setup

## SETUP Users

New User

User Edit

General Information

First Name	Jagadesh22
Last Name	S
Alias	JS
Email	jwrt1@gmail.com
Username	jwrt1@gmail.com
Nickname	User169612379983618745
Title	
Company	
Department	
Division	

Role: Marketing Team  
User License: Salesforce Platform  
Profile: -None-  
Active: -None-  
Marketing User: Standard Platform User  
Office User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type: -None-  
Data.com Monthly Addition Limit: Default Limit (300)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

Help for this Page

Did you find what you're looking for? Try using Global Search.

25°C Partly sunny

08:23 AM 01-10-2023

Users | Salesforce

Search Setup

## SETUP Users

All Users

On this page you can create, view, and manage users. In addition, download Salesforce@ to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users | Edit: Create, New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<a href="#">Edit</a> S.Jagade	JS	jwrt10@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh	JS	jwrt1117@gmail.com	SE Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh	JS	jwrt123@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh11	JS	jwrt123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh22	JS	jwrt1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Valid

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

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

25°C Partly sunny

08:24 AM 01-10-2023

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

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

SEARCH

SETUP Permission Sets

Permission Sets

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

All Permission Sets | Edit | Delete | Create New View

New

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

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All | Page 1 of 2

https://kot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/home

25°C Partly sunny

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

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

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.

25°C Partly sunny

SEARCH

SETUP Permission Sets

Create

Enter permission set information

Label: permission12

API Name: permission12

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

https://kot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

25°C Partly sunny

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Did you find what you're looking for? Try using Global Search.

25°C Partly sunny

Setup Home Object Manager

Search Setup

Permission Sets

permission12

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description: permission12

License: Session Activation Required

Namespace Prefix: permission12

Created By: Jagadish S. 01/10/2023, 8:24 am

Last Modified By: Jagadish S. 01/10/2023, 8:24 am

Apps

Assigned Apps

Assigned Connected Apps

Object Settings

App Permissions

Apex Class Access

Visualforce Page Access

External Data Source Access

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Did you find what you're looking for? Try using Global Search.

25°C Partly sunny

Setup Home Object Manager

Search Setup

Permission Sets

permission12

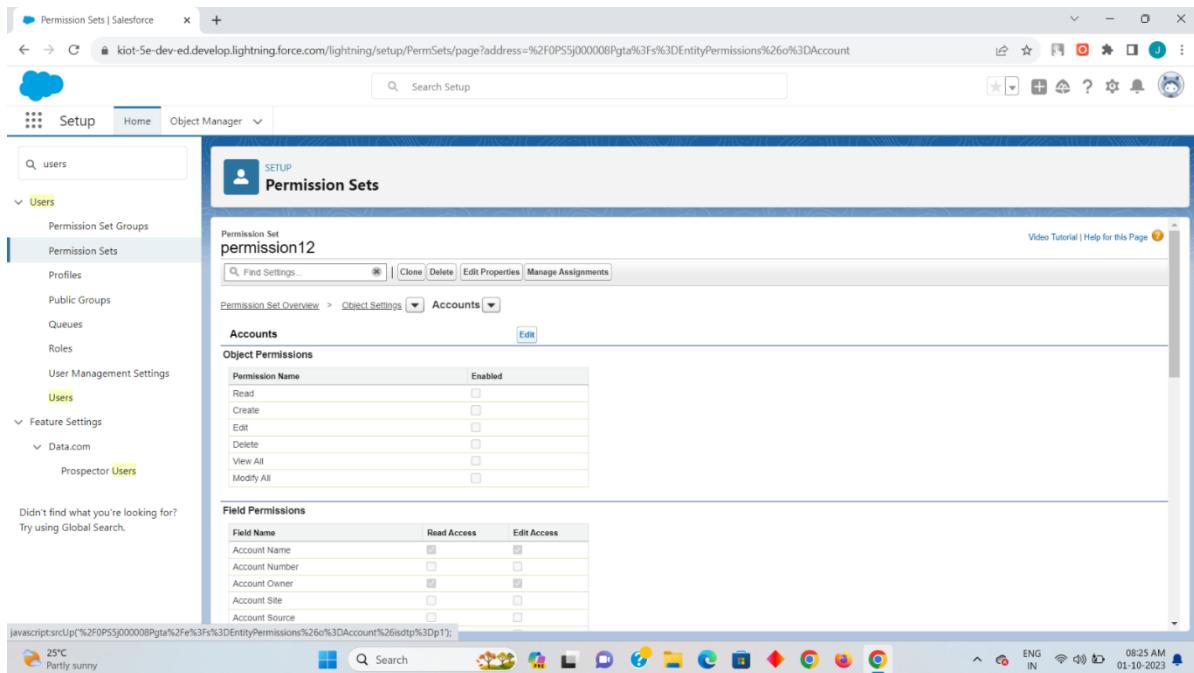
Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings

Object Settings

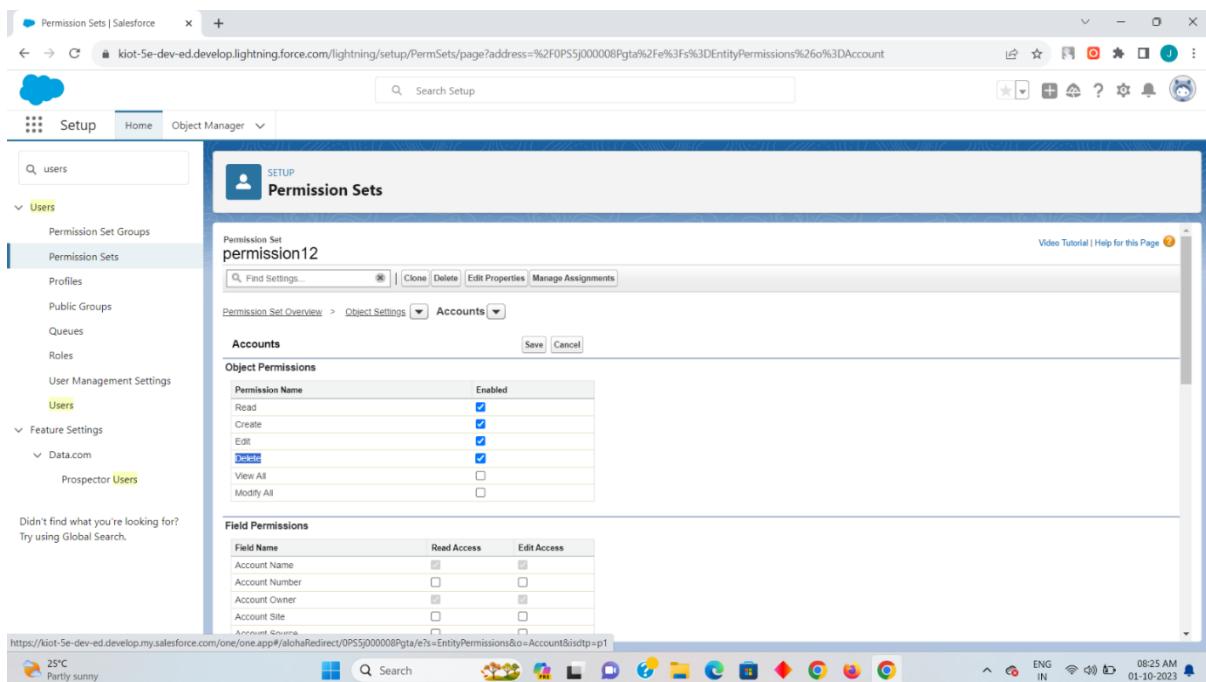
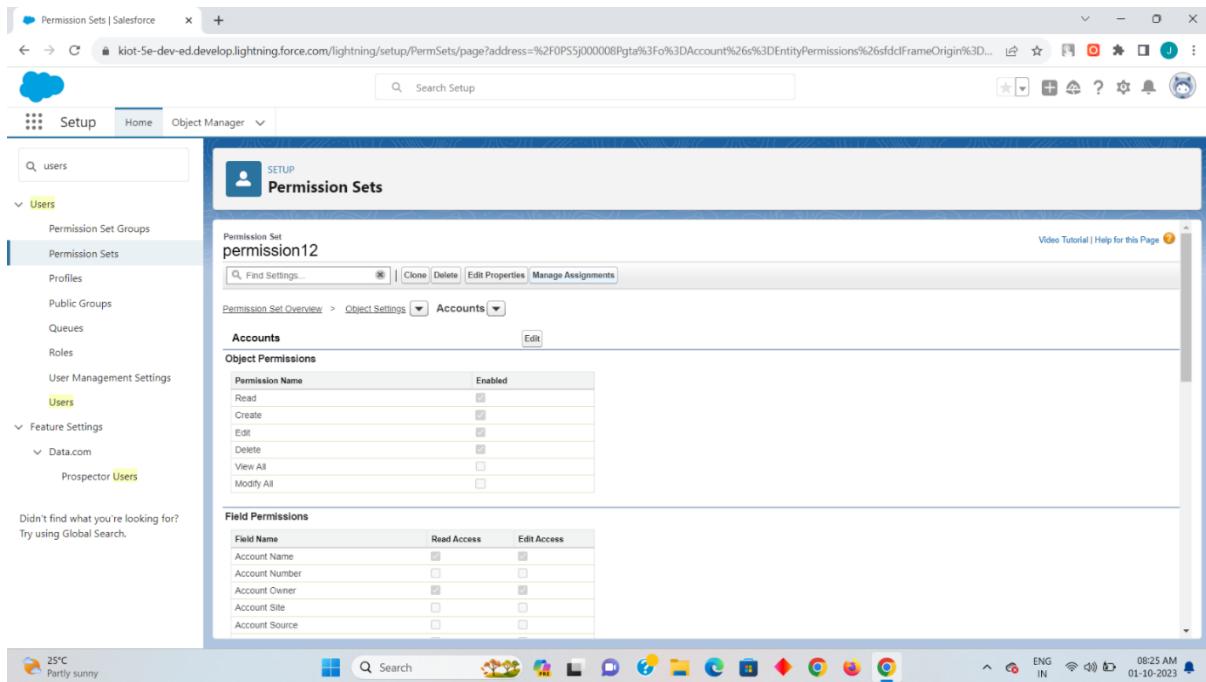
Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	9	--
Accounts	No Access	44	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invitees	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--

ENG IN 08:25 AM 01-10-2023



## Step 7:

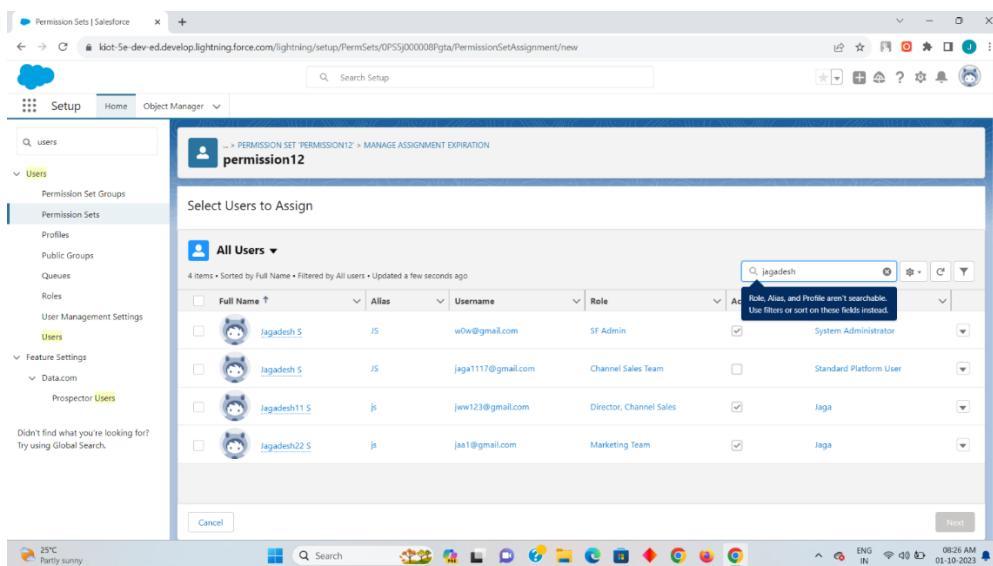
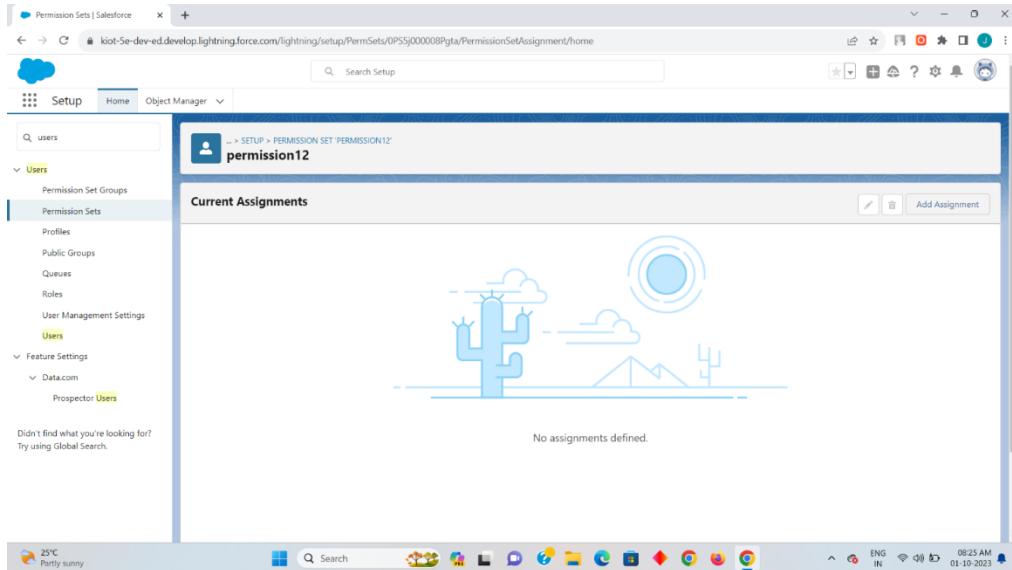
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.



## Step 8

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

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

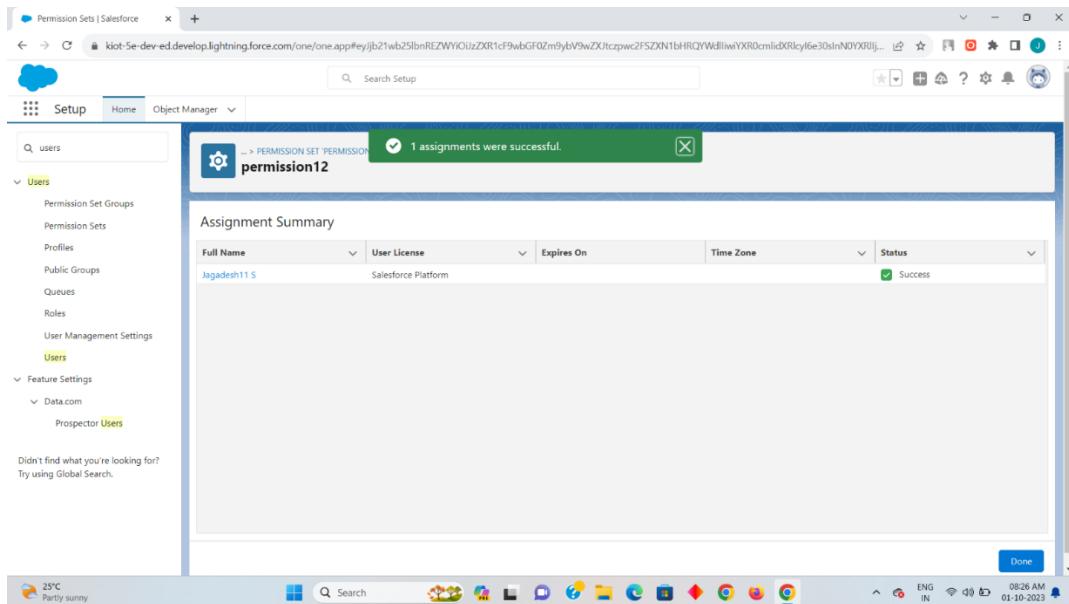


The screenshot shows the 'Permission Sets' section in the Salesforce Setup. A permission set named 'permission12' is selected. The 'Manage Assignment Expiration' tab is active. The 'Select Users to Assign' step is shown, with a search bar containing 'jagadesh'. A table lists four users: Jagadesh S, Jagadesh S, Jagadesh11 S, and Jagadesh22 S. Jagadesh11 S is checked. The table includes columns for Full Name, Alias, Username, Role, Active status, and Profile. Buttons for 'Cancel' and 'Next' are at the bottom.

Click on next.

The screenshot shows the continuation of the permission set assignment process. The 'Select an Expiration Option For Assigned Users' step is displayed. The 'No expiration date' radio button is selected. Below it, there's an option to 'Specify the expiration date' with buttons for 1 Day, 1 Week, 30 Days, 60 Days, and Custom Date. A 'Time Zone' dropdown is also present. The 'Selected Users' table shows the user Jagadesh11 S assigned to the permission set. The table includes columns for Full Name, Role, Profile, Active status, User License, and Expires On. Buttons for 'Cancel', 'Back', and 'Assign' are at the bottom.

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**.

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

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

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

# screenshot.

The screenshot shows the 'Email Template' page in Salesforce. The title bar says 'Email Template' and 'Thank You Email - Survey'. The top right has buttons for 'Edit in Builder', 'Edit', 'Clone', and a dropdown. Below is a 'Details' tab and a 'Related' tab. Under 'Information', there's a 'Description' section with 'Email Template Name: Thank You Email - Survey', 'Related Entity Type: Survey Result', 'Folder: Public Email Templates', and a checked 'Made in Email Template Builder' checkbox. In the 'Message Content' section, the 'Subject' is 'Thank You For Completing Our Survey!' and the 'HTML Value' contains a message to a survey participant. The message starts with 'Hi {{Survey\_Result\_\_c.Name\_\_c}},' followed by a paragraph of appreciation for their participation and a note about sharing results through their State Survey Agency. It concludes with thanks from an 'Automation Champion'. The 'Additional Information' section shows 'Created By: Rakesh Gupta, 12/21/2020, 4:23 PM' and 'Last Modified By: Rakesh Gupta, 12/21/2020, 4:32 PM'.

## Step 3: Create an Email Alert

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

## Email Alert button.

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

Edit Email Alert  
Survey - Thank You Email

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

**Email Alert Edit**

Save | Save & New | Cancel

= Required Information

Description	Survey - Thank You Email				
Unique Name	Survey_Thank_You_Email				
Object	Survey Result				
Email Template	Thank You Email - Survey				
Protected Component	<input type="checkbox"/>				
Recipient Type	Search: User for: Find				
Recipients	<table border="1"><thead><tr><th>Available Recipients</th><th>Selected Recipients</th></tr></thead><tbody><tr><td>User: Integration User User: Rakesh Gupta User: Security User</td><td>Email Field: Email</td></tr></tbody></table> <p>Add Remove</p>	Available Recipients	Selected Recipients	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email
Available Recipients	Selected Recipients				
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email				
You can enter up to five (5) email addresses to be notified.					
Additional Emails	<input type="text"/>				
From Email Address	Current User's email address <input type="checkbox"/>				
<input type="checkbox"/> 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																				
Save Response	Save_Response																				
Description																					
<p>How Many Records to Create</p> <input checked="" type="radio"/> One <input type="radio"/> Multiple																					
<p>How to Set the Record Fields</p> <input type="radio"/> Use all values from a record <input checked="" type="radio"/> Use separate resources, and literal values																					
<p>Create a Record of This Object</p> <p>* Object</p> <p>Survey Result</p>																					
<p>Set Field Values for the Survey Result</p> <table border="1"> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Comment__c</td> <td><input type="text"/> Aa Comment X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Email__c</td> <td><input type="text"/> Aa Email &gt; Value X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Name__c</td> <td><input type="text"/> (!Name.firstName) (!Name.lastName)</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Rating__c</td> <td><input type="text"/> Aa Rating X</td> </tr> <tr> <td colspan="2"><a href="#">+ Add Field</a></td> </tr> <tr> <td colspan="2"><input type="checkbox"/> Manually assign variables</td> </tr> </table>		Field	Value	Comment__c	<input type="text"/> Aa Comment X	Field	Value	Email__c	<input type="text"/> Aa Email > Value X	Field	Value	Name__c	<input type="text"/> (!Name.firstName) (!Name.lastName)	Field	Value	Rating__c	<input type="text"/> Aa Rating X	<a href="#">+ Add Field</a>		<input type="checkbox"/> Manually assign variables	
Field	Value																				
Comment__c	<input type="text"/> Aa Comment X																				
Field	Value																				
Email__c	<input type="text"/> Aa Email > Value X																				
Field	Value																				
Name__c	<input type="text"/> (!Name.firstName) (!Name.lastName)																				
Field	Value																				
Rating__c	<input type="text"/> Aa Rating X																				
<a href="#">+ Add Field</a>																					
<input type="checkbox"/> Manually assign variables																					
<p><a href="#">Cancel</a> <a href="#">Done</a></p>																					

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

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

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

## You Email.

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

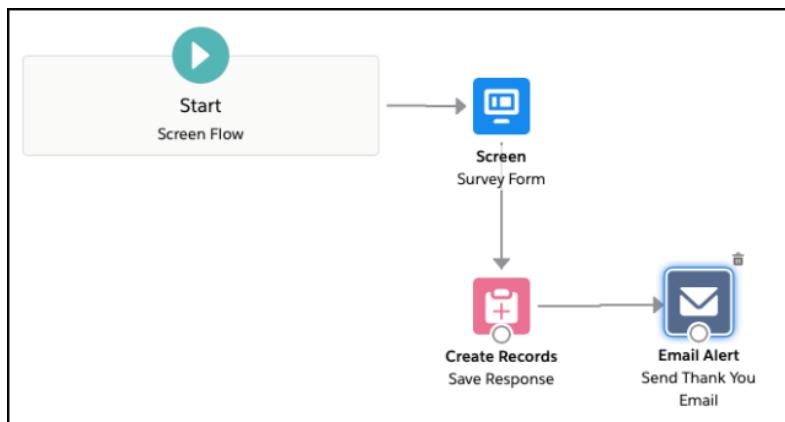
Edit "Survey - Thank You Email" email alert

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

*Label	*API Name
Send Thank You Email	Send_Thank_You_Email
Description	
Set Input Values	
!a *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 ?

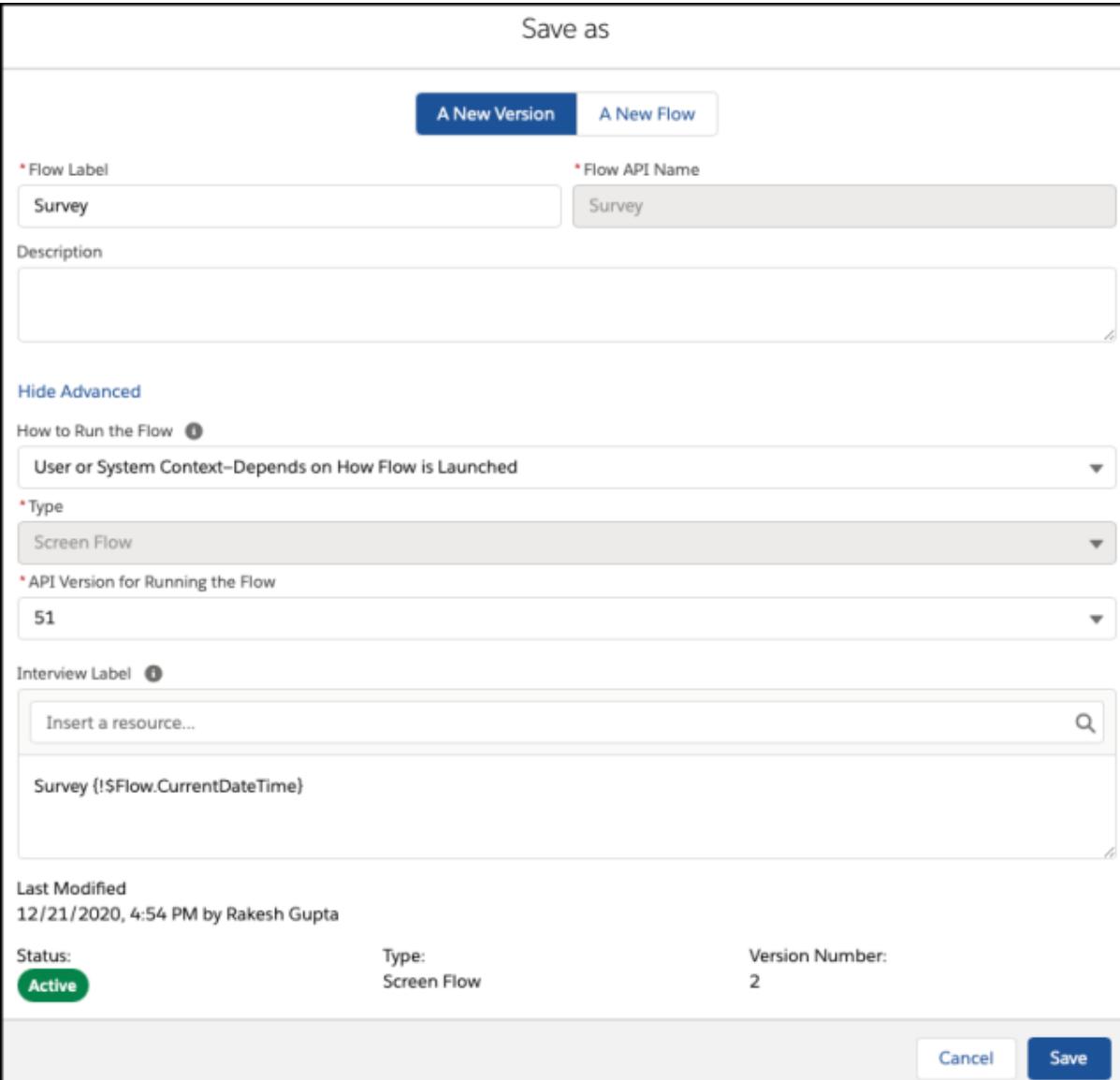
Insert a resource... Search

Survey {\$Flow.CurrentDateTime}

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

Status: <span>Active</span>	Type: Screen Flow	Version Number: 2
-----------------------------	-------------------	-------------------

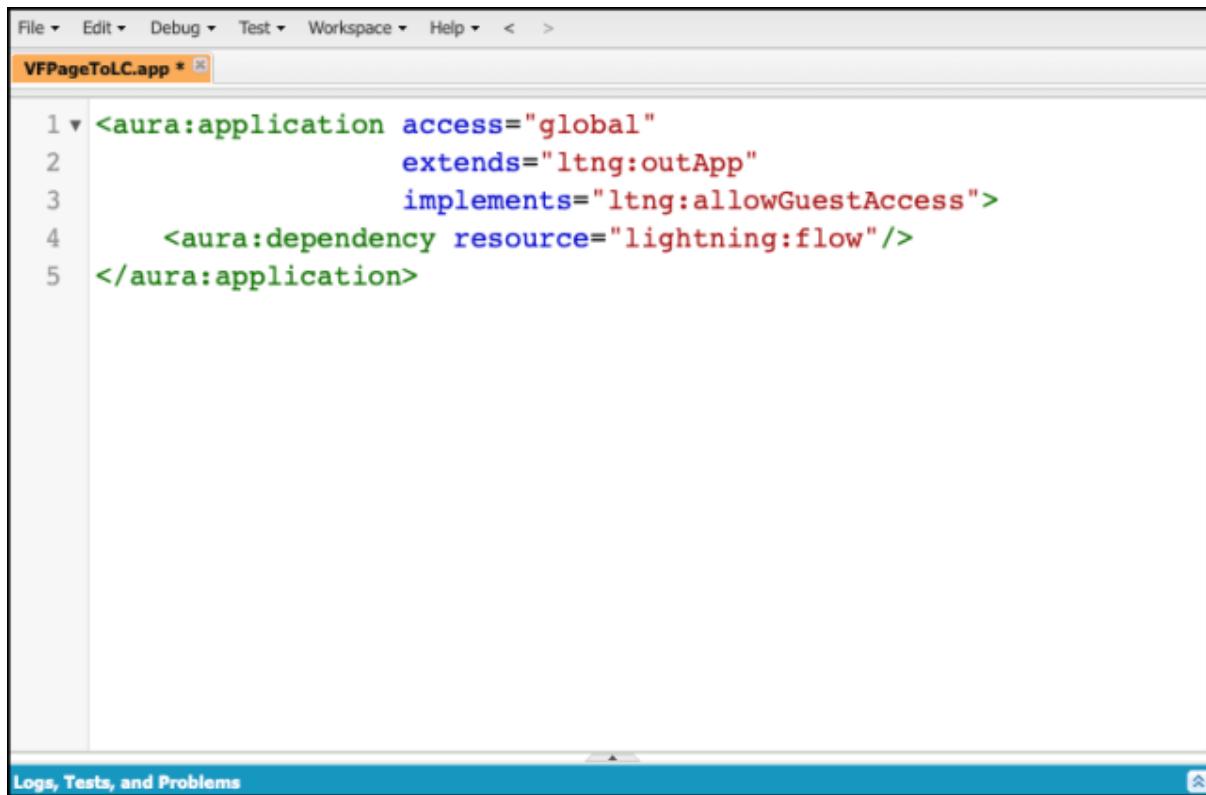
Cancel Save



## 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.



The screenshot shows a code editor window with the title bar "File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >" and the file name "VFPageToLC.app \*". The code in the editor is:

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

At the bottom of the editor, there is a blue bar with the text "Logs, Tests, and Problems" and a small icon.

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

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

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

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

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

The screenshot shows the 'Visualforce Page Survey' setup screen. The 'Page Edit' tab is selected. Under 'Page Information', the 'Label' is set to 'Survey' and the 'Name' is also 'Survey'. The 'Description' field is empty. There are two checkboxes: one checked for 'Available for Lightning Experience, Experience Builder, mobile web, and the mobile app', and one unchecked for 'Require CSRF protection on GET requests'. Below this is the 'Visualforce Markup' tab, which contains the following code:

```
<apex:page showheader="false" lightningStylesheets="true">
<head>
<apex:includeLightning />
<!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualforce page-->
</head>
<body class="slds-scope">
<div id="flowContainer" />
<script>
var statusChange = function (event) {
    if(event.getParam("status") === "FINISHED") {
        var outputVariables = event.getParam("outputVariables");
        var key;
        for(key in outputVariables) {
            if(outputVariables[key].name === "myOutput") {
                ...
            }
        }
    }
};
$Lightning.use("c:VFPPageToLC", function() {
    $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
    "flowContainer",
    function (component) {
        component.startFlow("Survey", );
    }
});
</script>
</body>
```

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

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

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

**Site Edit**

**Save Cancel**

Site Label	Survey	<input type="button" value="i"/>
Site Name	Survey	<input type="button" value="i"/>
Site Description	<input type="text"/>	
Site Contact	Rakesh Gupta	<input type="button" value="i"/> <input type="button" value="e"/>
Default Record Owner	Rakesh Gupta	<input type="button" value="i"/> <input type="button" value="e"/>
Default Web Address	http://katihar-developer-edition.gus.force.com/_survey <input type="button" value="i"/>	
Active	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Active Site Home Page	Survey	<input type="button" value="i"/> [Preview]
Inactive Site Home Page	InMaintenance	<input type="button" value="i"/> [Preview]
Site Template	SiteTemplate	<input type="button" value="i"/> <input type="button" value="e"/>
Site Robots.txt	<input type="text"/>	
Site Favorite Icon	<input type="text"/>	
Analytics Tracking Code	<input type="text"/>	
URL Rewriter Class	<input type="text"/>	
Enable Feeds	<input type="checkbox"/>	
Clickjack Protection Level	Allow framing by the same origin only (Recommended) <input type="button" value="i"/> <input type="button" value="e"/>	
Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Lightning Features for Guest	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Users		
Upgrade all requests to HTTPS	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Enable Content Sniffing Protection	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Referrer URL Protection	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Guest Access to the Payments API	<input type="checkbox"/> <input type="button" value="i"/>	

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

## Proof of Concept

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

**Survey**

Name

First Name  
Alok

Last Name  
Sinfal

\*Email  
[REDACTED]

\*Rating  
5

\*Comment  
Awesome Blog



**Next**

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

Thank You For Completing Our Survey!  [Inbox](#)  

 **Survey Site Guest User** via [bj9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com](#)  
to me 

8:09 PM (1 minute ago)   

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