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Salesforce
Developer(Course)
Assignment no1

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

Solution:

Step 1: Create Custom Objects

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

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** "Setup" > "Object Manager" > "New Custom Object".
- Title Bar:** "SETUP" and "New Custom Object".
- Message Bar:** "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." with links to "Tell me more!" and "Don't show this message again".
- Custom Object Definition Edit:**
 - Custom Object Information:** Fields include "Label" (college), "Plural Label" (colleges), and "Example: Account". A checkbox "Starts with vowel sound" is unchecked.
 - Description:** A large text area for describing the object.
 - Context-Sensitive Help Setting:** Radio buttons for "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page".
 - Content Name:** A dropdown menu set to "None".
- Enter Record Name Label and Format:** Fields include "Record Name" (college Name), "Example: Account Name", and "Data Type" (Text).
- Optional Features:** A list of checkboxes for enabling reports, activities, field history, chatter groups, and licensing.
- Object Classification:** A note about enterprise vs light application objects, followed by checkboxes for sharing, bulk API access, and streaming API access.
- Deployment Status:** Radio buttons for "In Development" (unchecked) and "Deployed" (selected).
- Search Status:** A note about allowing users to find records, followed by a checkbox for "Allow Search".
- Object Creation Options (Available only when custom object is first created):** Checkboxes for "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".
- Buttons:** "Save", "Save & New", and "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 new object are disabled by default. The 'Custom Object Definition Edit' screen is displayed, with the 'Label' field set to 'department' and the 'Plural Label' field set to 'departments'. Other fields like 'Description' and 'Content Name' are also visible. The 'Record Name' field is set to 'Department Name' and the 'Data Type' is 'Text'. Various optional features and deployment status settings are shown, along with object classification and search status options.

Step 2: Create a Master-Detail Relationship

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

1. Goto 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 datatype.
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 Object Manager interface for the CDepartment object. The left sidebar lists various configuration tabs: 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, and Validation Rules. The main content area displays the object's details, including its API Name (CDepartment__c), which is marked as Custom. Other details include Singular Label (CDepartment), Plural Label (CDepartments), Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window.

The screenshot shows the process of creating a new relationship for the CDepartment object. The left sidebar is identical to the previous screenshot. The main content area is titled "New Relationship" and is currently on "Step 3 of 6". The form fields include: Field Label (College), Field Name (college), Description (empty), Help Text (empty), Child Relationship Name (CDepartments), Sharing Setting (Read Only selected), and two checkboxes for Allow reparenting and Auto add to custom report type. A note indicates that Read Only allows users with at least Read access to the Master record to create, edit, or delete related Detail records, while Read/Write allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

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 datatype.
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 with the following details:

- Header:** Search Setup, various icons for navigation and help.
- Breadcrumbs:** SETUP > OBJECT MANAGER CDepartment
- Left Sidebar:** Details, Fields & Relationships (selected), 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.
- Table:** Fields & Relationships (4 items, Sorted by Field Label)

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

Salesforce Setup Page - Tabs

Custom Tabs

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.

Salesforce Setup Page - Object Manager

college

New Custom Field

Step 5. Add to page layouts Step 5 of 5

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

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

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

Add Field Page Layout Name
 college Layout

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

Salesforce Setup - Object Manager

college

New Custom Field

Step 4. Establish field-level security

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

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

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

Help for this Page

Step 4 of 5

Previous Next Cancel

Salesforce Setup - Object Manager

college

New Custom Field

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: college
Summarized Object: CDepartments

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: None

Filter Criteria

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

Help for this Page

Step 3 of 5

Previous Next Cancel

Salesforce Setup Page

college > Object Manager

New Custom Field

Step 2. Enter the details

Field Label: Total count

Field Name: Total_count

Description:

Help Text:

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

Step 2 of 5

Previous Next Cancel

Salesforce Setup Page

college > Object Manager

New Custom Field

Step 1. Choose the field type

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

Data Type

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Boolean

Select one of the data types below.

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

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.

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

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.

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

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

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

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

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

Step 1

Next Cancel

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'college'. Below the navigation is a breadcrumb trail: 'SETUP > OBJECT MANAGER college'. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Lightning Record Pages', and 'Validation Rules'. The main content area is titled 'Fields & Relationships' and displays four items. A table lists fields with columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The fields listed are:

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.

The screenshot shows the Salesforce Setup interface for creating a new custom object tab. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar and various icons are also present. On the left, a sidebar titled 'User Interface' contains 'Rename Tabs and Labels' and 'Tabs', with 'Tabs' currently selected. The main content area has a title 'New Custom Object Tab' and a sub-section 'Step 2. Add to Profiles'. It instructs the user to choose user profiles for the new tab's visibility. A radio button is selected for 'Apply one tab visibility to all profiles [Default On]'. Below this, a table lists numerous user profiles on the left and their corresponding 'Tab Visibility' dropdown menus on the right, all set to 'Default On'. At the bottom right of the table are 'Previous', 'Next', and 'Cancel' buttons.

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

SETUP Tabs

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: college

Tab Style: Jewel

(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

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

SETUP Tabs

Step 3. Add to Custom Apps Step 3 of 3

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

Custom App	Include Tab
Platform (standard_Platform)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>
Content (standard_Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>
Sales (standard_LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard_QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard_DataManager)	<input checked="" type="checkbox"/>
Bolt Solutions (standard_LightningBolt)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input checked="" type="checkbox"/>

Append tab to users' existing personal customizations

Previous Save Cancel

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

SETUP Tabs

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

Setup Home Object Manager

app

Salesforce Mobile App Data Mass Transfer Approval Requests

Apps

- App Manager
- AppExchange Marketplace
- Connected Apps

 - Connected Apps OAuth Usage
 - Manage Connected Apps

- Lightning Bolt

 - Flow Category
 - Lightning Bolt Solutions

- Mobile Apps

 - Salesforce

 - Salesforce Branding
 - Salesforce Navigation
 - Salesforce Notifications
 - Salesforce Offline
 - Salesforce Settings

- Packaging

Installed Packages

SETUP Lightning Experience App Manager

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

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

New Lightning App New Connected App

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The left sidebar has sections for 'User Interface' and 'Rename Tabs and Labels', with 'Tabs' currently selected. A message at the top says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section includes a 'New' button and a 'What Is This?' link. The 'Custom Object Tabs' section lists five tabs with their labels and tab styles:

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	

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

MECW

My college colleges CDepartments student Content

Search...

New Contact Edit New Opportunity

Related Details

college Name: mecw

Owner: krishna.s

Total count: 2

phone: 9087116402

Email: kiot@gmail.com

Location: 90, 80

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

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

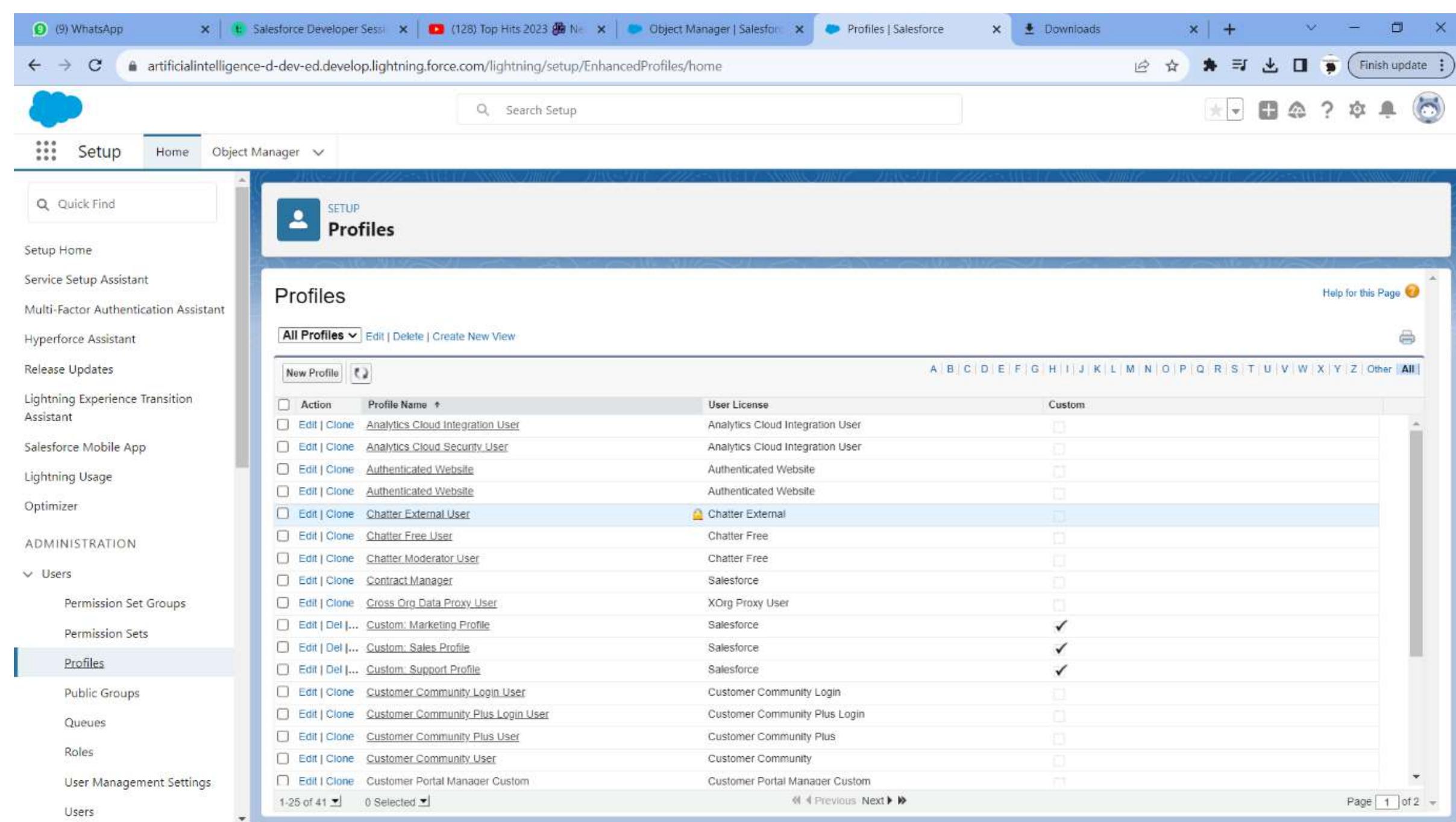
History

This screenshot shows a college record in a CRM system. The record is for 'mecw' (College Name). The owner is 'krishna.s'. There are 2 contacts associated with this college. The contact information includes a phone number (9087116402), an email (kiot@gmail.com), and a location (90, 80). The record was created by 'krishna.s' on 01/10/2023 at 11:16 am and last modified by 'krishna.s' on 01/10/2023 at 11:19 am. The interface features a dark blue header with navigation links like 'My college', 'colleges', 'CDepartments', 'student', and 'Content'. A search bar and various icons are also present.

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' tab selected under 'Object Manager'. The main area displays a table of profiles, each with an 'Action' column containing options like 'Edit | Clone' and 'Delete'. The columns include 'Profile Name', 'User License', and 'Custom'. The 'User License' column includes links to 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External', 'Chatter Free', 'Chatter Moderator', 'Contract Manager', 'Cross Org Data Proxy User', 'Marketing Profile', 'Sales Profile', 'Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'Custom' column has checkboxes, some of which are checked for certain profiles. The bottom of the page shows pagination with '1-25 of 41' and '0 Selected'.

Screenshot of the Salesforce Setup interface showing the Profiles page.

The left sidebar shows the following navigation:

- 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

The main content area displays the "Profiles" list:

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

Page navigation: 1-7 of 7 | 0 Selected | Previous | Next | Page 1 of 1

Screenshot of the Salesforce Setup interface showing the "Clone Profile" dialog.

The left sidebar shows the same navigation as the previous screenshot.

The main content area displays the "Clone Profile" form:

You must select an existing profile to clone from.

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

Buttons: Save | Cancel

Salesforce Developer Session | lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe... | Profiles | Salesforce

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page ⓘ

I = Required Information

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

Quick Find Search Setup

Salesforce Developer Session | lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%3Fsetupid%3DEnhancedProfiles | Profiles | Salesforce

Profile Manager

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

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

Login IP Ranges [] | Enabled Apex Class Access [] | Enabled Visualforce Page Access [] | Enabled External Data Source Access [] | Enabled Named Credential Access [] | Enabled External Credential Principal Access [] | Enabled Custom Metadata Type Access [] | Enabled Custom Setting Definitions Access [] | Enabled Flow Access [] | Enabled Service Presence Status Access [] | Enabled Custom Permissions []

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

Help for this Page ⓘ

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

Quick Find Search Setup

Salesforce Developer Session | lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ8z%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce

Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name	Manager	Save	Save & New	Cancel
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>		
Description				

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input 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

Overwrite users' personal tab customizations

Home	Default On	Learning	Default On
Accounts	Default On	Libraries	Tab Hidden
Alert Settings	Default On	Lightning Bolt Solutions	Default On

Communication Subscription Channel Types

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

Custom Object Permissions

	Basic Access					Data Administration							
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Bank	<input type="checkbox"/>	Enhancement Requests	<input type="checkbox"/>										
customers	<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 Setup interface showing the Profiles page under Custom Object Permissions.

Custom Object Permissions:

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

Session Settings:

- Session Times Out After: 2 hours of inactivity
- Session Security Level Required at Login: None

Password Policies:

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obscure secret answer for password resets:
- Require a minimum 1 day password lifetime:
- Don't immediately expire links in forgot password emails:

Profiles

Custom Object Permissions

Object	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"/>													
customers	<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"/>							

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adanna_Diya	dadan	test_diya_pas_4w8bjybl5wik.tszorgsbkxpx.3qj8ofoyzwns.ti43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UMS User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5j00000hcskkkeab.lc0bfwmqjike@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Ellington_Amelia	aelli	amelia.ellington.1.46kxcp9oodih.d6cwpcduo4wh.hnbdwmvwhhg.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S_GOPAL	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	Integ	integration@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Developer Session - artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv...

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

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:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Salesforce Developer Session - artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2fe%3FretURL%3D%252F005%253FisUserEntityOv...

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name: sowmiya

Last Name: bala

Alias: sbala

Email: 2k20cse179@kiot.ac.in

Username: 2k21f@kiot.ac.in

Nickname: User169616771282564526

Title: worker

Company: kiot bank

Department:

Division:

Role: <None Specified>

User License: Salesforce Platform

Profile: Manager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

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:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

The screenshot shows a web browser with two tabs open:

- Salesforce Developer Session**: This tab displays the Salesforce Setup interface under the "Users" section. It shows the "User Detail" for a user named "sowmiya bala". The user's email is listed as "2k20cse179@kiot.ac.in [Verify]". The "Role" section indicates "Salesforce Platform Manager". Other details include "Active" checked, "Marketing User", "Offline User", "Knowledge User", "Flow User", "Service Cloud User", "Site.com Contributor User", "Site.com Publisher User", "WDC User", "Mobile Push Registrations", "Data.com User Type", "Accessibility Mode (Classic Only)", "Debug Mode", "High-Contrast Palette on Charts", "Load Lightning Pages While Scrolling" checked, and "Salesforce CRM Content User" checked.
- Gmail**: This tab shows the Gmail inbox with 5,318 messages. A new message from "support@salesforce.com" is visible, with the subject "Welcome to Salesforce!". The message body contains a "Verify Account" button and a URL: <https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>. It also includes a "Username: 2k21it@kiot.ac.in" and the text "Again, welcome to Salesforce!".

(9) WhatsApp x | (1) Salesforce Dev x | (128) Top Hit x | Object Manager x | Users | Sales! x | Downloads x | Welcome to... x | Recently Viewed x | Change Your... x | +

Finish update

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

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

Incognito

Finish update

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

WATCH ON DEMAND

AIDay

salesforce

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

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.

sowmiya bala
artificialintelligence-d-dev-ed.develop.my.sal...
Settings Log Out

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...

mecw - Bank customers Home

Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

* = Required Information

Information

Bank Name: boi

Owner: sowmiya bala

phoneno: 0897754534

Cancel Save & New Save

List View

New customer | Salesforce

Recently Viewed ▾

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

customer Name ↓

New customer

* = Required Information

Information

*customer Name
madhu

*Bank
boi

Cancel Save & New Save

List View

madhu | customer | Salesforce

MECW

customer madhu

customer "madhu" was created.

Related Details

customer Name
madhu

Bank
boi

Created By
sowmiya bala, 01/10/2023, 7:17 pm

Last Modified By
sowmiya bala, 01/10/2023, 7:17 pm

New Contact Edit Delete

List View

The screenshot displays two screenshots of the Salesforce Lightning interface. The top screenshot shows the 'New customer' creation screen with fields for 'customer Name' (madhu) and 'Bank' (boi). The bottom screenshot shows the 'Details' view of the newly created customer record, confirming its creation and displaying the customer's name and bank information.

The screenshot shows two views of the Salesforce Setup interface. The top view displays the 'Profiles' page under the 'Profiles' tab in the 'SETUP' header. The sidebar on the left shows navigation 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, ADMINISTRATION, and Users. Under Users, 'Profiles' is selected. The main content area lists profiles with columns for Action, Profile Name, User License, and Custom. The 'salesmanager' profile is selected. The bottom view shows a 'Clone Profile' dialog box. The sidebar on the left is identical. The main content area has a heading 'Clone Profile' and a sub-instruction 'Enter the name of the new profile.' Below this, a message says 'You must select an existing profile to clone from.' It shows an 'Existing Profile' section with 'Standard Platform User' and 'Salesforce Platform' under 'User License'. A 'Profile Name' field contains 'salesmanager'. At the bottom are 'Save' and 'Cancel' buttons.

Salesforce Developer Session 2 | (128) Top Hits 2023 | Profiles | Salesforce | Welcome to Salesforce: Verify yo... | 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

Quick Find Search Setup Help for this Page

Profile
salesmanage

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

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

Profile Detail

Name	Salesmanager	Edit	Clone	Delete	View Users
User License	Salesforce Platform	Custom Profile ✓			
Description					
Created By	GOPAL_S_01/10/2023, 7:19 pm	Modified By GOPAL_S_01/10/2023, 7:19 pm			

Page Layouts

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

Salesforce Developer Session 2 | (128) Top Hits 2023 | Profiles | Salesforce | Welcome to Salesforce: Verify yo... | 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

Quick Find Search Setup Help for this Page

Profile Edit
salesmanage

Set the permissions and page layouts for this profile.

Profile Edit

Name	salesmanager	Save	Save & New	Cancel
User License	Salesforce Platform	Custom Profile ✓		
Description				

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

Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On
Accounts	[View Assignment]
Learning	Default On
Opportunities	[View Assignment]

Salesforce Developer Session 2 | (128) Top Hits 2023 | Profiles | Salesforce | Welcome to Salesforce: Verify yo... | 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

Custom Object Permissions

	Bank	customers	Enhancement Requests									
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Contact Point Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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	Must include alpha and numeric characters
Password complexity 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 2 | (128) Top Hits 2023 | Profiles | Salesforce | Welcome to Salesforce: Verify yo... | 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

Custom Object Permissions

	Bank	customers	Enhancement Requests									
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Contact Point Emails	<input checked="" type="checkbox"/>											
User External Credentials	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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	Must include alpha and numeric characters
Password complexity requirement: Cannot contain password	Maximum invalid login attempts: 10	Lockout effective period: 15 minutes	Obscure secret answer for password resets
Require a minimum 1 day password lifetime	Don't immediately expire links in forgot password emails		

Save | Save & New | Cancel

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

Cloud icon

Users

New User

User Edit

General Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

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:

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

Cloud icon

Users

New User

User Edit

General Information

First Name: madhu

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: Salesforce Platform

Profile: salesmanage

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

The screenshot shows the Salesforce Setup interface with the 'Users' configuration page open. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and a search bar. Under 'User Management Settings', the 'Users' section is selected. The main content area displays the 'Users' configuration page with the following sections:

- Mailing Address**: Fields for Street, City, Zip/Postal Code, State/Province, and Country.
- Single Sign On Information**: Field for Federation ID.
- Locale Settings**: Time Zone set to (GMT+05:30) India Standard Time (Asia/Kolkata), Locale set to English (India), and Language set to English.
- Approver Settings**: Fields for Delegated Approver, Manager, and a dropdown for Receive Approval Request Emails (set to Only if I am an approver). A checkbox for Generate new password and notify user immediately is checked.

At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows a web browser window with two tabs open:

- Salesforce Developer Session 2**: This tab displays the Salesforce Setup interface under the "Users" section. A user named "madhu b" is selected. The "User Detail" page shows various profile information such as Name (madhu b), Alias (mb), Email (2k20cse179@kiot.ac.in), Username (2k20csit@kiot.ac.in), Nickname (User16961684242865419206), Title (worker), Company (kiot bank), Department (Sales), Division (4/194, anyampalayam, uthamasolapuram, Paraikkadu, salem- 636308, SALEM 636308, TAMIL NADU), Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata), Locale (English (India)), Language (English), and Profile (salesmanag). Other tabs like Edit, Sharing, Reset Password, Login, and Freeze are visible.
- Gmail**: This tab shows the Gmail inbox. The inbox contains 5,318 messages. A welcome message from Salesforce is highlighted:

Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Username:
2k20csit@kiot.ac.in

Again, welcome to Salesforce!

At the bottom of the inbox, there are "Reply" and "Forward" buttons.

[Change Your Password | Salesforce](#)

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



Change Your Password

Enter a new password for **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

Search...

 **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

MECW

mecw Bank customers Home

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 | Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesfo... | Welcome to Salesforce! | Reset Password | Salesfo...

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

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

SETUP

Permission Sets

Help for this Page

All Permission Sets | Edit | Delete | Create New View

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		CRM User
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Agent	Access agent features in Service Cloud Voice contact centers that...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Salesforce
<input type="checkbox"/>	Experience_Profile_Manager	Lets users create, read, edit, and delete locations, sublocations, queu...	Facility Manager
<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		

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

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.

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce! | Reset Password | Salesforce

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

Setup Home Object Manager

Search Setup

Permission Sets

Help for this Page

Permission Sets

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

In addition, you can use the 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

New

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	Manage Service Cloud Voice contact centers that use Amazon Conn...	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. S...	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		

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 |

1-25 of 29 | 0 Selected | Previous | Next | Page 1 of 2

Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce: Version 43.0

Reset Password | Salesforce

Finish update

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

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Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Permission Sets

Create

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

I = Required Information

Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce: Version 43.0

Reset Password | Salesforce

Finish update

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

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Actions & Recommendations

App Menu

SETUP

Permission Sets

Create

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

I = Required Information

The screenshot displays two instances of the Salesforce Setup interface, both showing the 'Permission Sets' page for a permission set named 'salesmanager'.

Top Window (Permission Set Overview):

- Header:** SETUP | Permission Sets
- Left Sidebar:** Users > Permission Sets
- Content:**
 - Permission Set Overview:**
 - API Name: salesmanager
 - Namespace Prefix:
 - Created By: GOPAL S, 01/10/2023, 7:29 pm
 - Apps:**
 - Assigned Apps: Settings that specify which apps are visible in the app menu
 - Assigned Connected Apps: Settings that specify which connected apps are visible in the app menu
 - Object Settings: Permissions to access objects and fields, and settings such as tab availability
 - App Permissions: Permissions to perform app-specific actions, such as "Manage Call Centers"
 - Apex Class Access: Permissions to execute Apex classes
 - Visualforce Page Access: Permissions to execute Visualforce pages
 - External Data Source Access: Permissions to authenticate against external data sources
 - Flow Access: Permissions to execute Flows

Bottom Window (Object Settings):

- Header:** SETUP | Permission Sets
- Left Sidebar:** Users > Permission Sets
- Content:**
 - Object Settings:**

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment 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	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

Salesforce Setup interface showing the Permission Sets page for the 'salesmanager' permission set.

The left sidebar shows the navigation menu:

- Setup
- Home
- Object Manager

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Bank' object settings are being edited.

Tab Settings

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

Object Permissions

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

Field Permissions

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

Buttons at the top right of the main content area include: Find Settings, Clone, Delete, Edit Properties, Manage Assignments, Video Tutorial, and Help for this Page.

Buttons at the bottom right of the main content area include: Save and Cancel.

Salesforce Developer Session | Lightning | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce! | Reset Password | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008Phok/PermissionSetAssignment/home

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Search Setup

Cloud icon

... > SETUP > PERMISSION SET 'SALESMANAGER'

salesmanager

Current Assignments

No assignments defined.

Add Assignment

Illustration of a cactus in a desert landscape with clouds and a sun.

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

Search this list...

All Users

1 item selected

Full Name ↑	Ali... ↓	Username	Role	Ac... ↓	Profile
Amelia Ellington	aelli	amelia.ellington.1.46kxcp9oodih.d6cwpdcu4wh.hnbdwmvwhhq.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>	Force.com - App Subscription User	<input type="button" value="Edit"/>
Chatter Expert	Chatty	chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	<input type="button" value="Edit"/>
Diya Adanna	dadan	test_diya_pas.4w8bjyb9wik.tszgrgsbkpx.3gi8ofovzwns.hl43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>	UMS User	<input type="button" value="Edit"/>
GOPAL S	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>	System Administrator	<input type="button" value="Edit"/>
Integration User	integ	integration@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	<input type="button" value="Edit"/>
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>	salesmanage	<input type="button" value="Edit"/>
Security User	sec	insightssecurity@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	<input type="button" value="Edit"/>
sowmiya bala	sbala	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>	Manager	<input type="button" value="Edit"/>

Cancel Next

Salesforce Developer Session

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/OPS5j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date (selected)

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

... > PERMISSION SET 'SALESMANAGER'

1 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

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App Menu

Recently Viewed | customers | S | +

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

MECW

mecw Bank customers Home

Search...

Recently Viewed

customers

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)

The screenshot shows a Salesforce Lightning interface for the 'customers' object. The title bar says 'Recently Viewed | customers | S | +' and the address bar shows 'artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer_c/list?filterName=Recent'. The main content area displays a single column titled 'customer Name' with a message stating 'You haven't viewed any customers recently. Try switching list views.' A context menu is open on the right, titled 'LIST VIEW CONTROLS', with options like 'New', 'Clone', 'Rename', 'Sharing Settings', 'Show List Filters', 'Select Fields to Display', 'Delete', and 'Reset Column Widths'. The browser's search bar contains 'Search...'. The top navigation bar includes links for 'mecw', 'Bank', 'customers', and 'Home'. A search bar is also present at the top. The bottom of the page has a footer with the text '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.

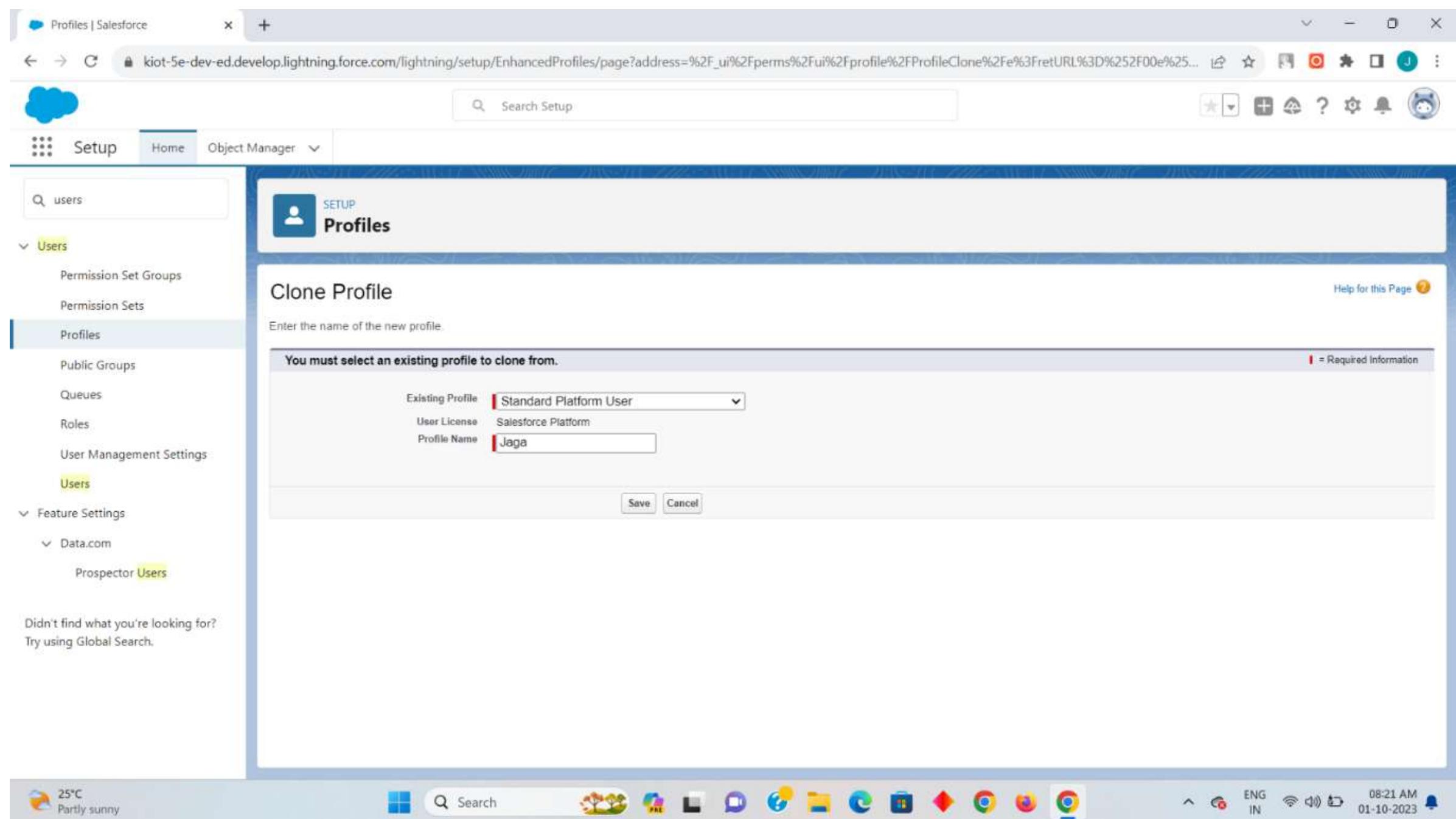
Setup-quick search[profile]

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

- Page Title:** Profiles | Salesforce
- URL:** kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e%3FisDeleteRedirect%3Dtrue%26setupid%3DEnhancedProfiles
- Header:** Search Setup
- Left Sidebar:** Setup, Home, Object Manager, a search bar with 'users', and a tree view with 'Users' expanded, showing 'Permission Set Groups', 'Permission Sets', 'Profiles' (selected), 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users' (selected), 'Feature Settings', and 'Data.com'.
- Main Content:** The 'Profiles' page with the title 'Profiles'. It shows a table of profiles with columns: Action, Profile Name, User License, and Custom. The table lists various profiles like 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External User', etc. A navigation bar at the bottom shows '1-25 of 41' and '0 Selected'.
- Bottom Bar:** Weather (25°C Partly sunny), a search bar, and a row of icons including the Windows logo, Start, Task View, File Explorer, Edge, File, Photos, Mail, and a few others.
- System Status:** ENG IN 08:20 AM 01-10-2023

Step 2:

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



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

Step 3:

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

The screenshot shows the Salesforce Setup interface with the URL <https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%3Fsetupid%3DEnhancedProfiles>. The left sidebar is expanded, showing sections like Users, Feature Settings, and Data.com. The main content area is titled 'Profile Jaga'. It displays the profile's name, license, and creation details. Below this is a table for 'Page Layouts' across various standard objects. The 'Alternative Payment Method' row has its 'View Assignment' checkbox checked. At the bottom right of the main content area is a 'Help for this Page' link.

This screenshot continues from the previous one, showing the 'Profiles' page. The 'Custom Object Permissions' section is visible, with two tables for 'Basic Access' and 'Data Administration' permissions. The 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All' checkboxes are all checked. The 'Session Settings' section below includes fields for 'Session Times Out After' (set to '2 hours of inactivity'), 'Session Security Level Required at Login' (set to 'None'), and several checkboxes for login policies. The left sidebar remains the same, showing the expanded 'Users' section.

Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3FretURL%3D%252F00e5j00000WQ2O%253Fsetupid...

Setup Home Object Manager

Search Setup

Cloud icon

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

Cloud icon

Search

Session Settings

Profile Edit

Profile Edit

Name: Jaga

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input type="radio"/>		<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input type="radio"/>		<input type="checkbox"/>	<input type="radio"/>
Hive App (Hive_App)	<input checked="" type="checkbox"/>	<input type="radio"/>		<input type="checkbox"/>	<input type="radio"/>
Platform (standard_Platform)	<input type="checkbox"/>	<input type="radio"/>		<input type="checkbox"/>	<input checked="" type="radio"/>
WDC (standard_Work)	<input type="checkbox"/>	<input type="radio"/>		<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations:

ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3FretURL%3D%252F00e5j00000WQ2O%253Fsetupid...

Setup Home Object Manager

Search Setup

Cloud icon

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

Cloud icon

Search

Profile Edit

Profile Edit

Name: Jaga

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input type="radio"/>		<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input type="radio"/>		<input type="checkbox"/>	<input type="radio"/>
Hive App (Hive_App)	<input checked="" type="checkbox"/>	<input type="radio"/>		<input type="checkbox"/>	<input type="radio"/>
Platform (standard_Platform)	<input type="checkbox"/>	<input type="radio"/>		<input type="checkbox"/>	<input checked="" type="radio"/>
WDC (standard_Work)	<input type="checkbox"/>	<input type="radio"/>		<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

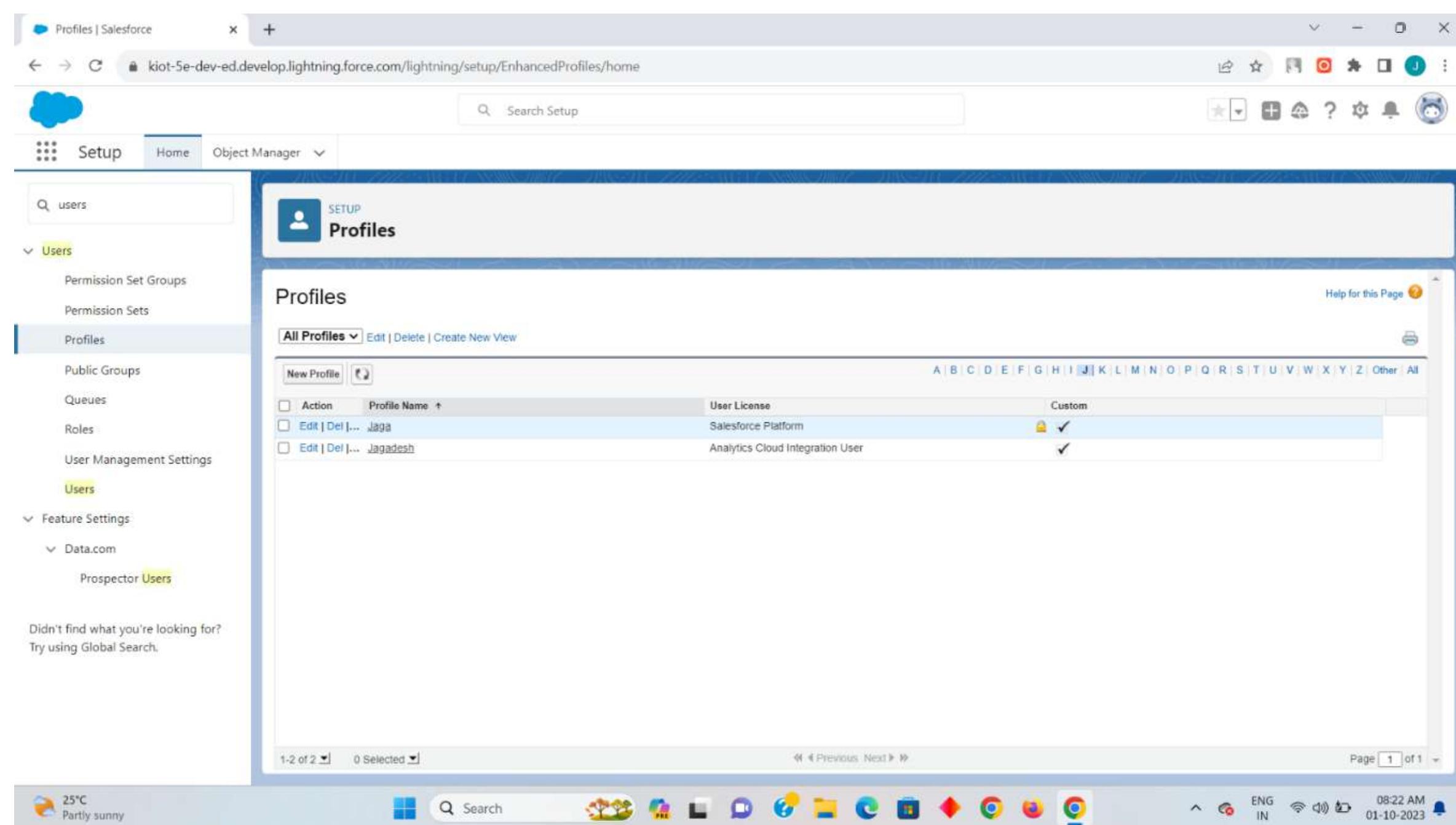
Tab Settings

Overwrite users' personal tab customizations:

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'. A sub-header 'All Profiles' is visible. The table lists two profiles:

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

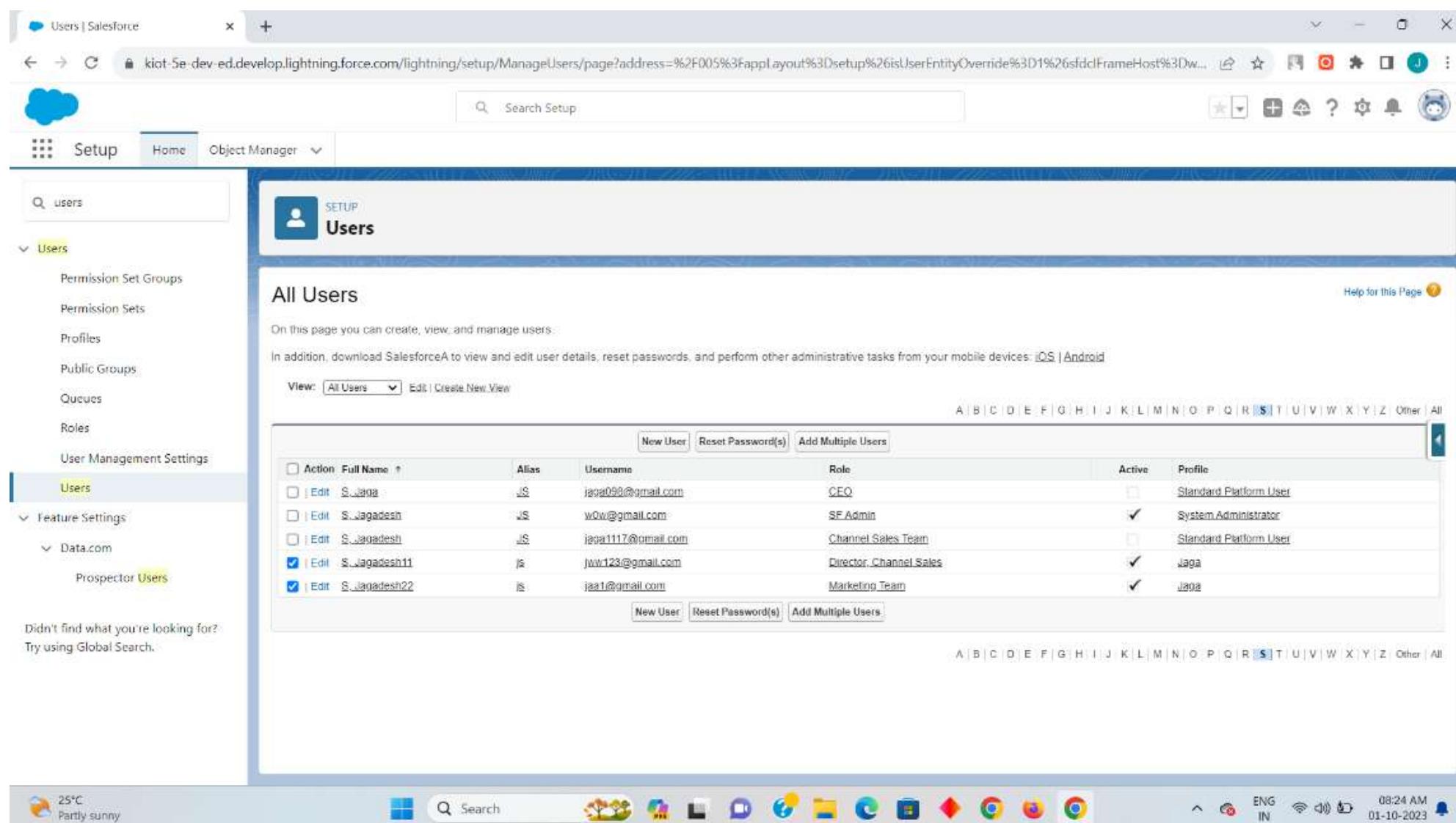
At the bottom of the page, there are navigation links for '1-2 of 2' and '0 Selected', and a 'Page 1 of 1' indicator. The status bar at the bottom of the browser window shows the date and time as '01-10-2023 08:22 AM'.

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 Taga 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 username can be created with alternate name but with the same user profile and once the two user are created click on save.

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar is titled 'Users' and includes options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospector Users. The main area is titled 'New User' and contains a 'User Edit' form with tabs for General Information, Advanced Settings, and Profile. The 'General Information' tab is active, showing fields for First Name (Jagadesh11), Last Name (S), Alias (js), Email (jww123@gmail.com), Username (jww123@gmail.com), Nickname (User169612875144962592), Title, Company, Department, and Division. To the right, there are dropdown menus for Role (Director, Channel Sales), User License (Salesforce Platform), Profile (None), Active (Jaga, selected), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (None), Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only), and High-Contrast Palette on Charts. A status bar at the bottom shows weather (25°C, Partly sunny), search, and system icons.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A search bar at the top right contains the text 'Search Setup'. The left sidebar has 'Users' expanded, with 'Users' highlighted in yellow. The main area displays the 'New User' page under 'User Edit'. The 'General Information' section includes fields for First Name (Jagadesh22), Last Name (S), Alias (js), Email (jaa1@gmail.com), Username (jaa1@gmail.com), Nickname (User169612879983618745), Title, Company, Department, and Division. To the right of these fields are dropdown menus for Role (Marketing Team), User License (Salesforce Platform), Profile (None), Active (Jaga, selected), Marketing User (Standard Platform User), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), Site.com Contributor User (unchecked), Site.com Publisher User (unchecked), WDC User (unchecked), Data.com User Type (None), Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only) (unchecked), and High-Contrast Palette on Charts (unchecked). At the bottom of the page are 'Save', 'Save & New', and 'Cancel' buttons.



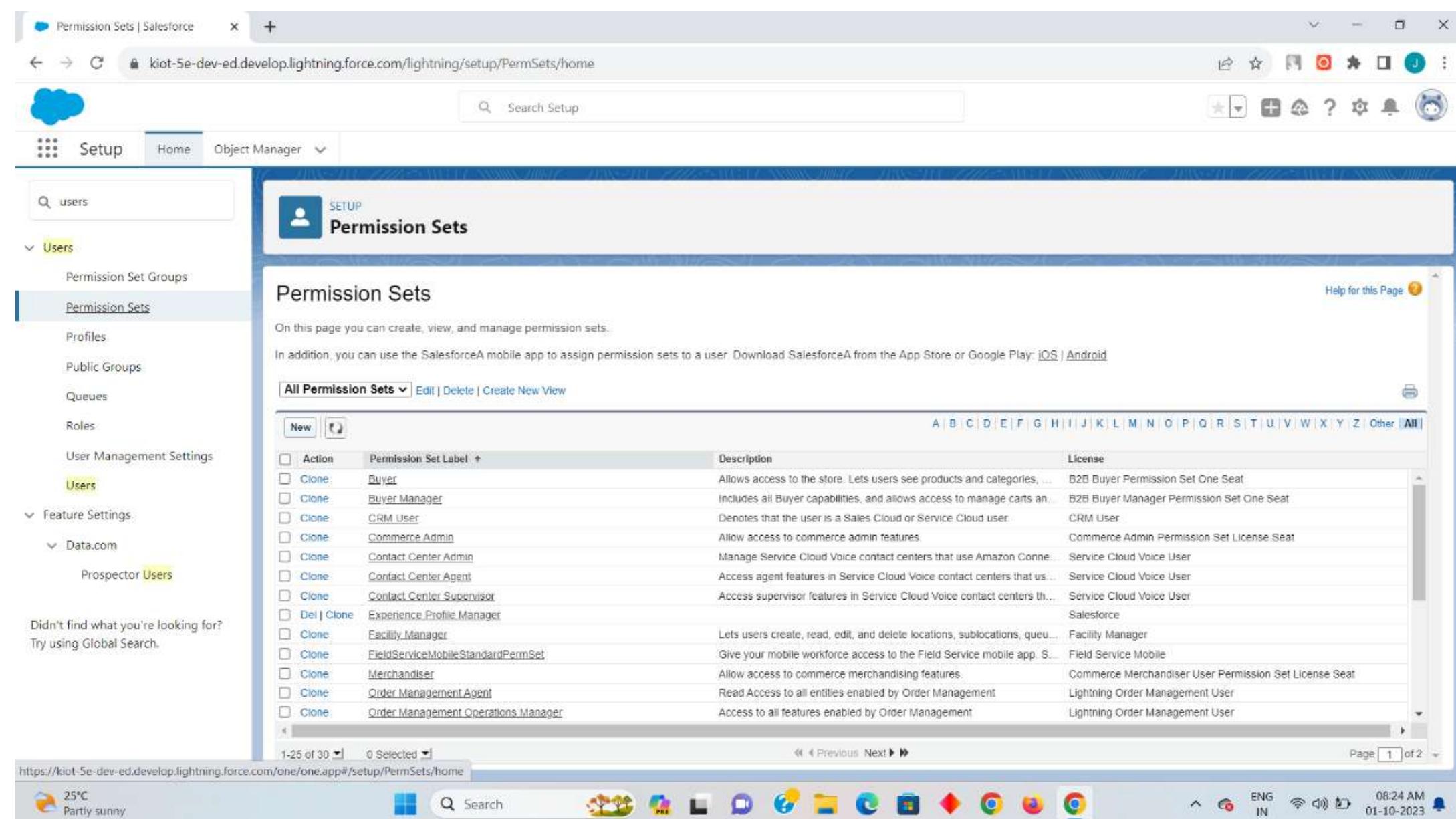
Now you can preview your two user that you have created in my side I had create the two users a Tagadesh11 and Tagadesh22 as a director channel sales with the marketing team.

Step 6:

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

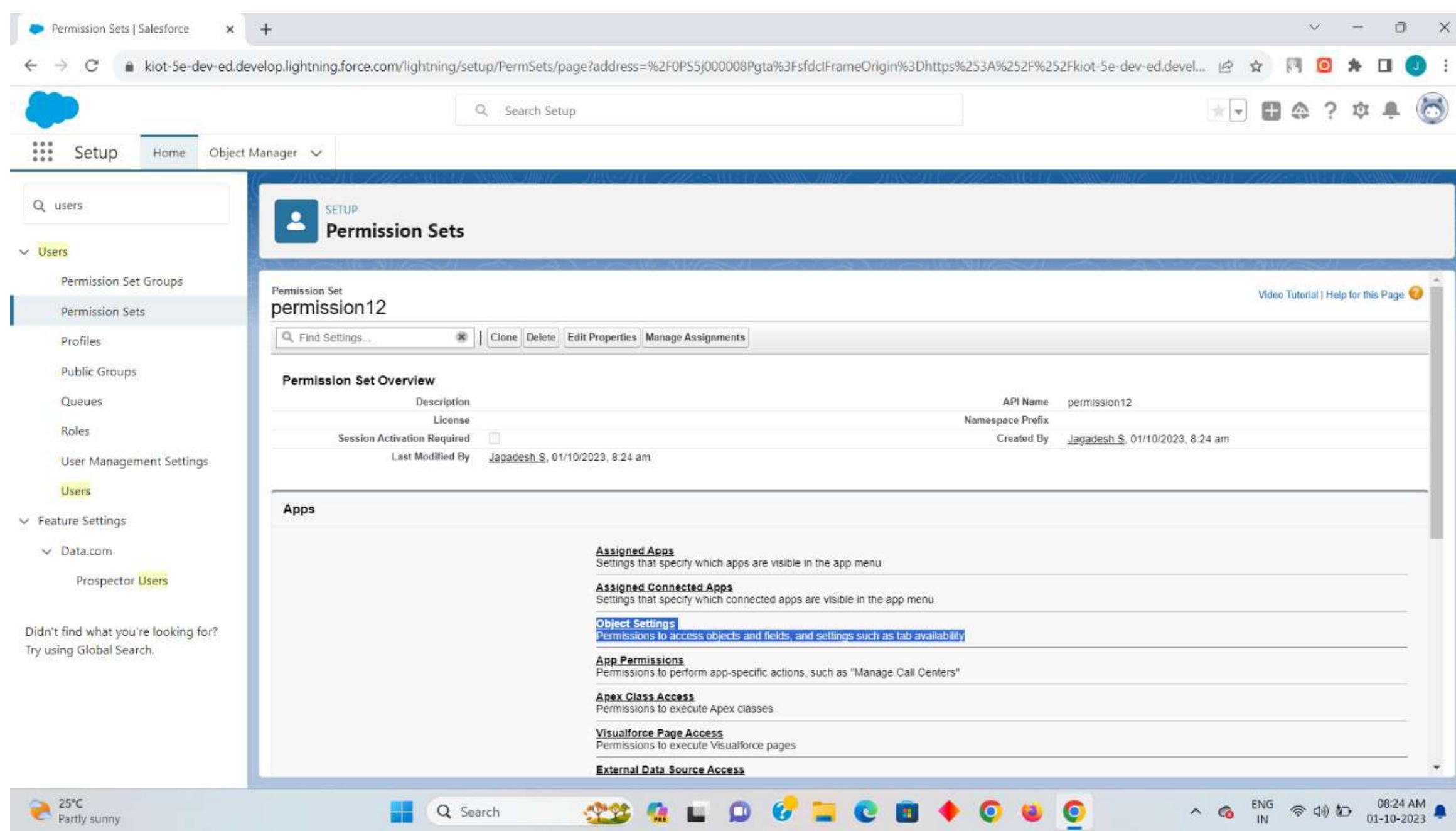
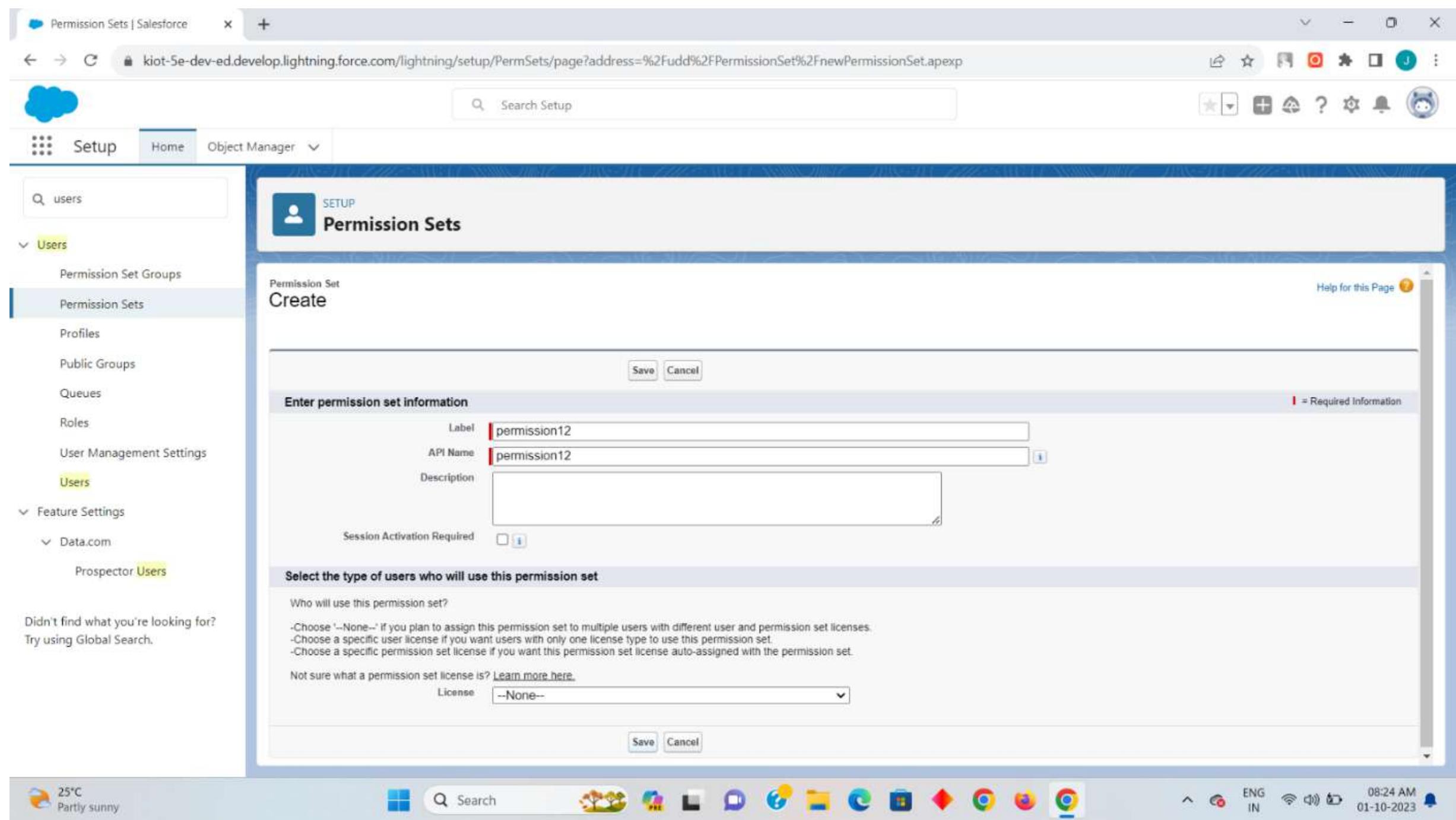
setup-quick search[permission set]-new-fill

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



The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar is collapsed, and the main content area displays a table of permission sets. The table columns are Action, Permission Set Label, Description, and License. The table lists various permission sets such as Buyer, Buyer Manager, CRM User, Commerce Admin, Contact Center Admin, Contact Center Agent, Contact Center Supervisor, Experience Profile Manager, Facility Manager, Field Service Mobile Standard PermSet, Merchandiser, Order Management Agent, and Order Management Operations Manager. Each row includes a checkbox for Action and a Clone link. The Description column provides a brief overview of each permission set's features, and the License column indicates the specific license required for each.

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 Conn...	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"/>	Experience Profile Manager	Experiences Profile Manager	Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Facility Manager
<input type="checkbox"/>	Field Service Mobile Standard PermSet	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User



The screenshot shows the Salesforce Setup interface under the 'Permission Sets' tab. A permission set named 'permission12' is selected. The 'Object Settings' section is displayed, listing various objects and their permissions. The table includes columns for Object Name, Object Permissions, Total Fields, and Tab 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	No Access	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	--

The screenshot shows the 'Object Permissions' section for the 'Accounts' object within the 'permission12' permission set. It lists various permissions (Read, Create, Edit, Delete, View All, Modify All) and their status (Enabled or Not Enabled). Below this, the 'Field Permissions' section is partially visible.

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"/>

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.

The screenshots show the Salesforce Setup interface for creating a new permission set. The permission set is named 'permission12'. In the 'Object Permissions' section, the 'Delete' permission is selected for the 'Accounts' object. In the 'Field Permissions' section, the 'Delete' permission is also selected for the 'Account' object.

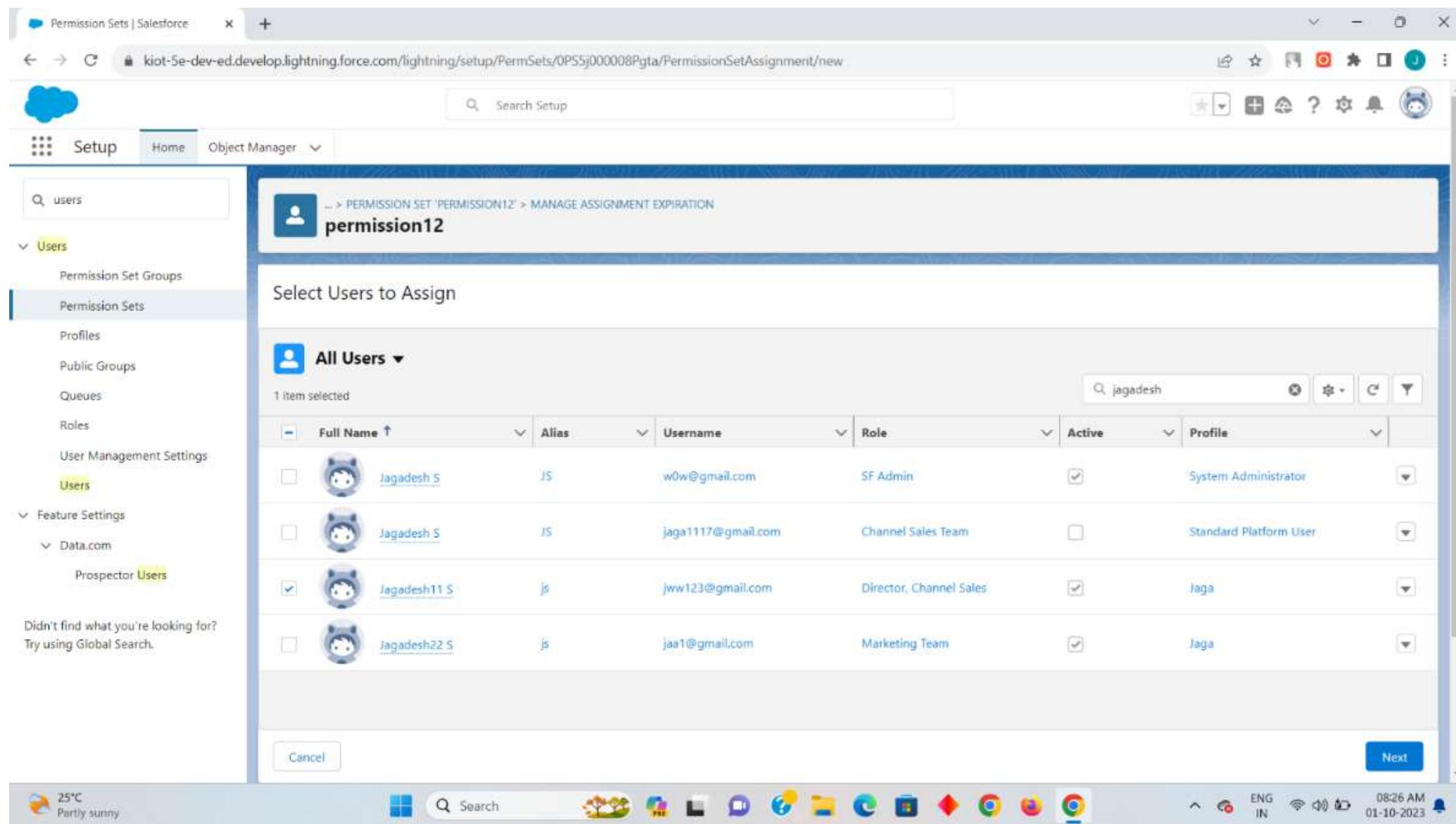
Step 8

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

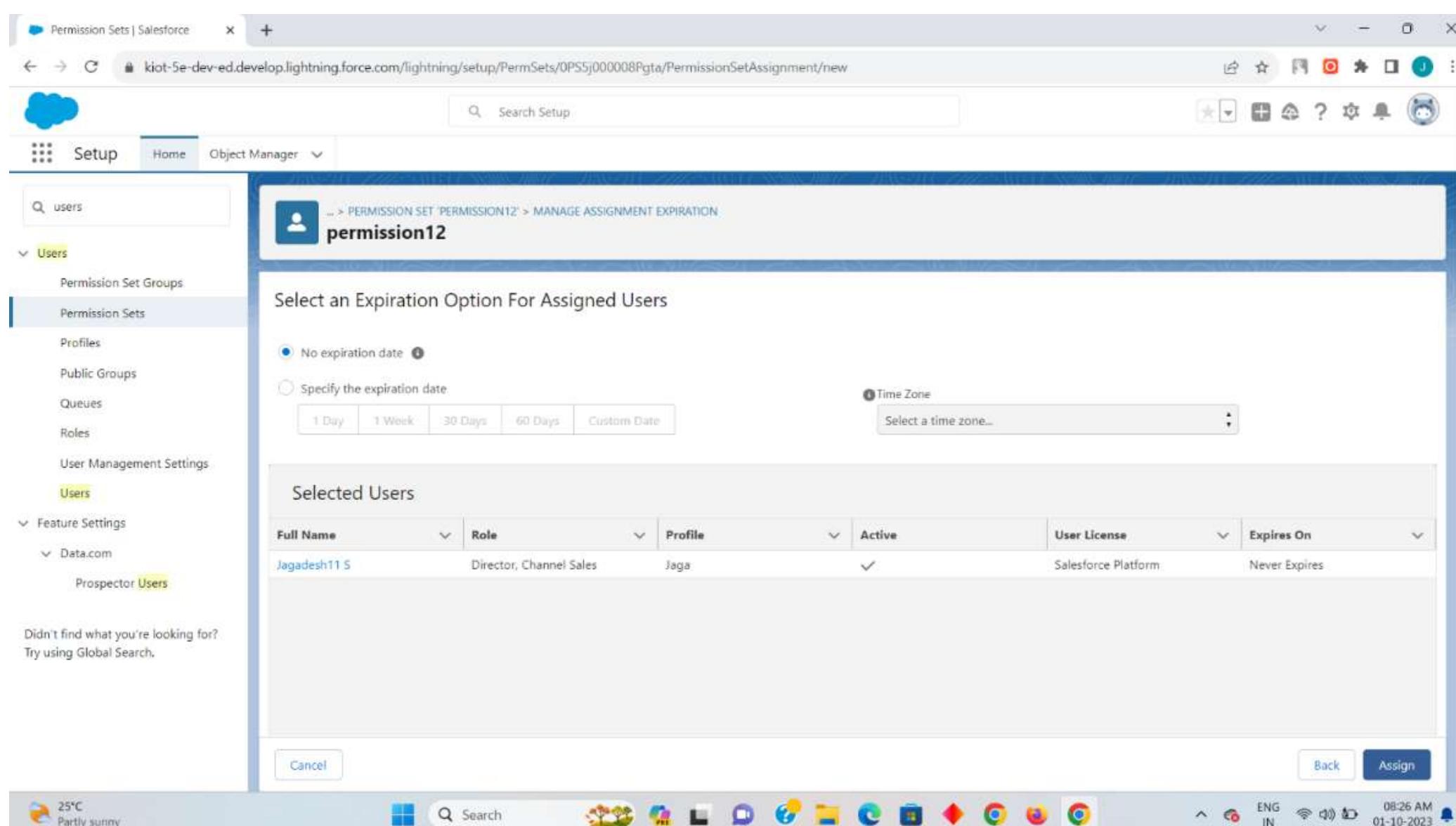
on assign so that the specific selected user can have a special access as delete on it.

This screenshot shows the 'Permission Sets | Salesforce' page in the Salesforce setup interface. The URL is kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/0P55j000008Pgta/PermissionSetAssignment/home. The left sidebar is expanded, showing sections like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Feature Settings'. The 'Users' section is currently selected. The main content area is titled 'permission12' and shows a decorative illustration of a cactus and sun. Below the illustration, a message says 'No assignments defined.' There are three buttons at the top right: 'Edit', 'View', and 'Add Assignment'. The status bar at the bottom indicates it's 08:25 AM on 01-10-2023.

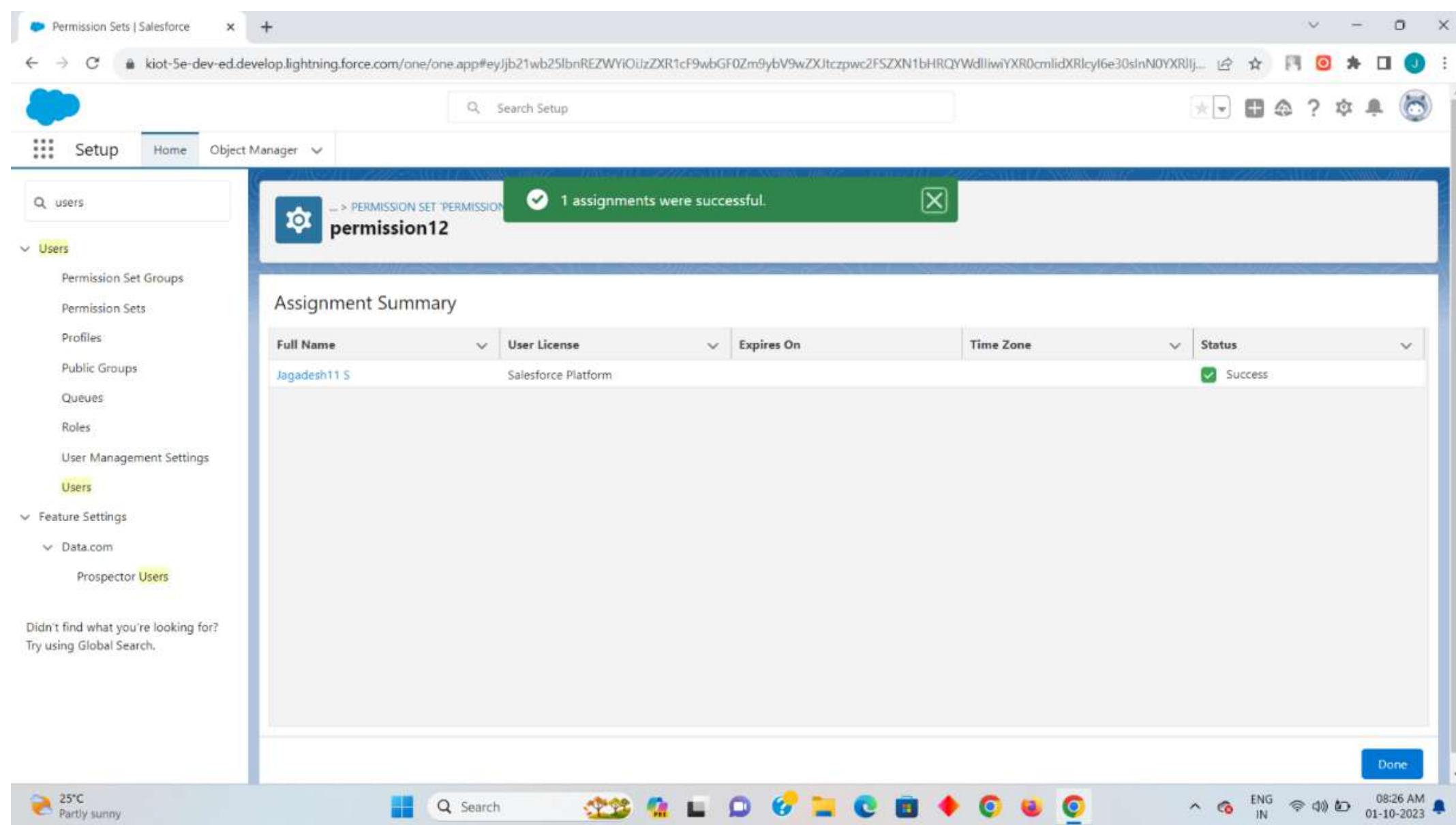
This screenshot shows the 'Manage Assignment Expiration' step of the permission set assignment process. The URL is kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/0P55j000008Pgta/PermissionSetAssignment/new. The left sidebar is identical to the previous screenshot. The main content area is titled 'permission12' and shows a 'Select Users to Assign' dialog. It lists four users under 'All Users': Jagadesh S (SF Admin, System Administrator), Jagadesh S (Channel Sales Team, Standard Platform User), Jagadesh11 S (Director, Channel Sales, Jag), and Jagadesh22 S (Marketing Team, Jag). A search bar at the top of the list shows 'jagadeth'. The status bar at the bottom indicates it's 08:26 AM on 01-10-2023.



Click on next.



Now click on Assign.



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

4.Create a screenflow 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
8 Items, Sorted by Name		Comment	Comment__c	Text Area(255)		
New Deleted Fields Field Dependencies Set History Tracking		Created By	CreatedById	Lookup(User)		
		Email	Email__c	Email		
		Last Modified By	LastModifiedById	Lookup(User)		
		Name	Name__c	Text(51)		
		Owner	OwnerId	Lookup(User,Group)		
		Rating	Rating__c	Picklist		
		Survey Result Name	Name	Auto Number		

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

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

Email Template
Thank You Email - Survey

Edit in Builder Edit Clone ▾

Details Related

Information

Email Template Name Thank You Email - Survey	Related Entity Type Survey Result
Description	Folder Public Email Templates

Made in Email Template Builder

Message Content

Subject Thank You For Completing Our Survey!	Enhanced Letterhead
HTML Value	<p>Hi {{Survey_Result__c.Name__c}},</p> <p>Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>

Additional Information

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

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

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

Edit Email Alert
Survey - Thank You Email Help for this Page 

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

Email Alert Edit		Save <input type="button"/> Save & New <input type="button"/> Cancel <input type="button"/>
Edit Email Alert ! = Required Information		
Description	<input type="text" value="Survey - Thank You Email"/>	
Unique Name	<input style="width: 150px;" type="text" value="Survey_Thank_You_Email"/> 	
Object	<input type="text" value="Survey Result"/>	
Email Template	<input style="width: 150px;" type="text" value="Thank You Email - Survey"/> 	
Protected Component	<input type="checkbox"/>	
Recipient Type	Search: <input type="text" value="User"/>  for: <input type="text"/> <input type="button" value="Find"/>	
Recipients	Available Recipients User: Integration User User: Rakesh Gupta User: Security User <input type="button" value="Add"/>  <input type="button" value="Remove"/> 	Selected Recipients Email Field: Email <input type="button" value="Add"/>  <input type="button" value="Remove"/> 
You can enter up to five (5) email addresses to be notified.		
Additional Emails <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>		
From Email Address	<input style="width: 150px;" type="text" value="Current User's email address"/> 	
<input type="checkbox"/> Make this address the default From email address for this object's email alerts. 		
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="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 ScreenFlow 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:

How Many Records to Create

- One
- Multiple

How to Set the Record Fields

- Use all values from a record
- Use separate resources, and literal values

Create a Record of This Object

* Object

Survey Result

Set Field Values for the Survey Result

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

+ Add Field

Manually assign variables

Cancel Done

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

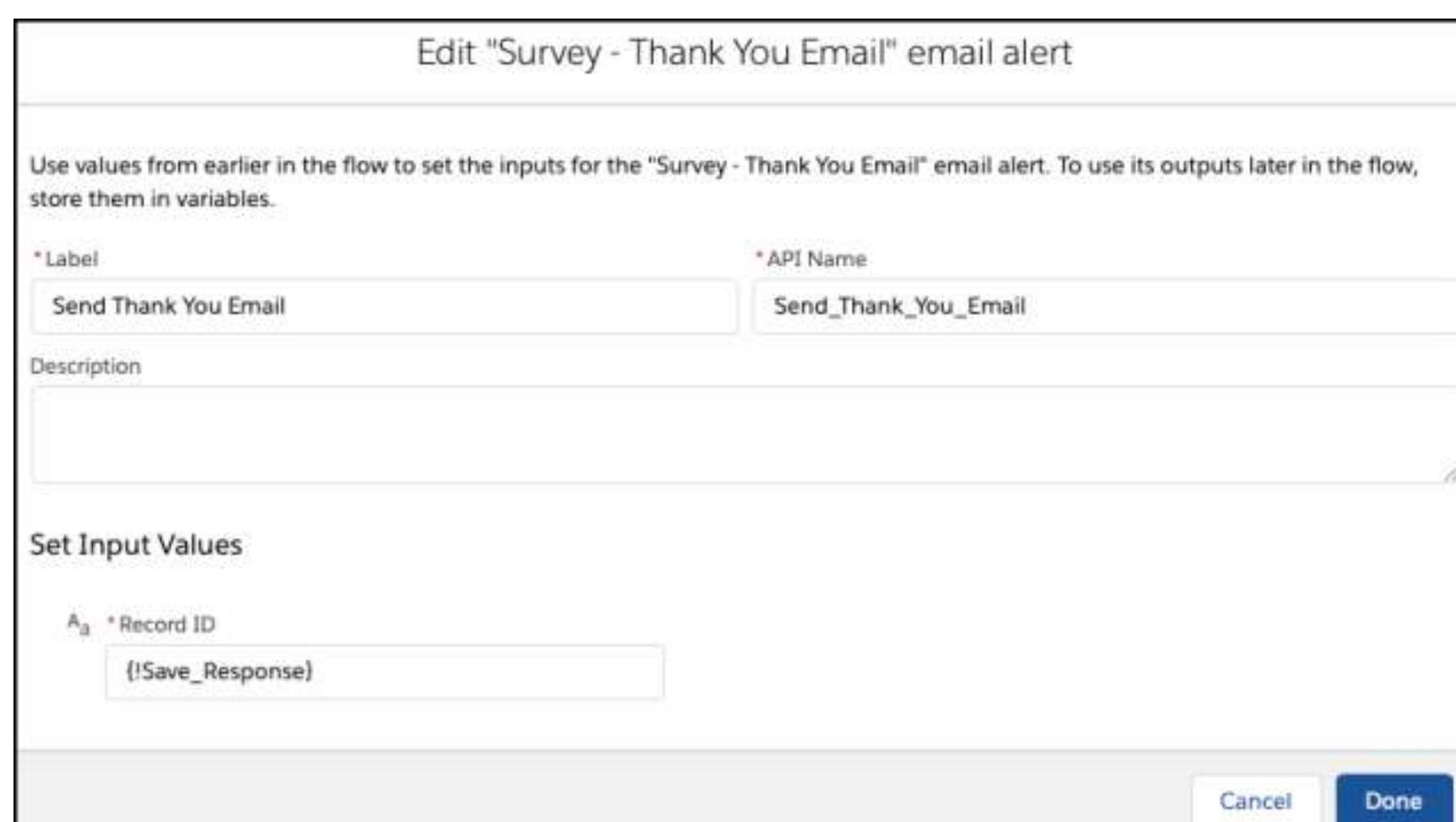
The next step is to call the Survey—Thank You Email email alert from flow so that when flow fires it triggers the thank you email to survey participants.

1. Under Toolbox, select Element.
2. Drag-and-drop Action element onto the Flow designer.

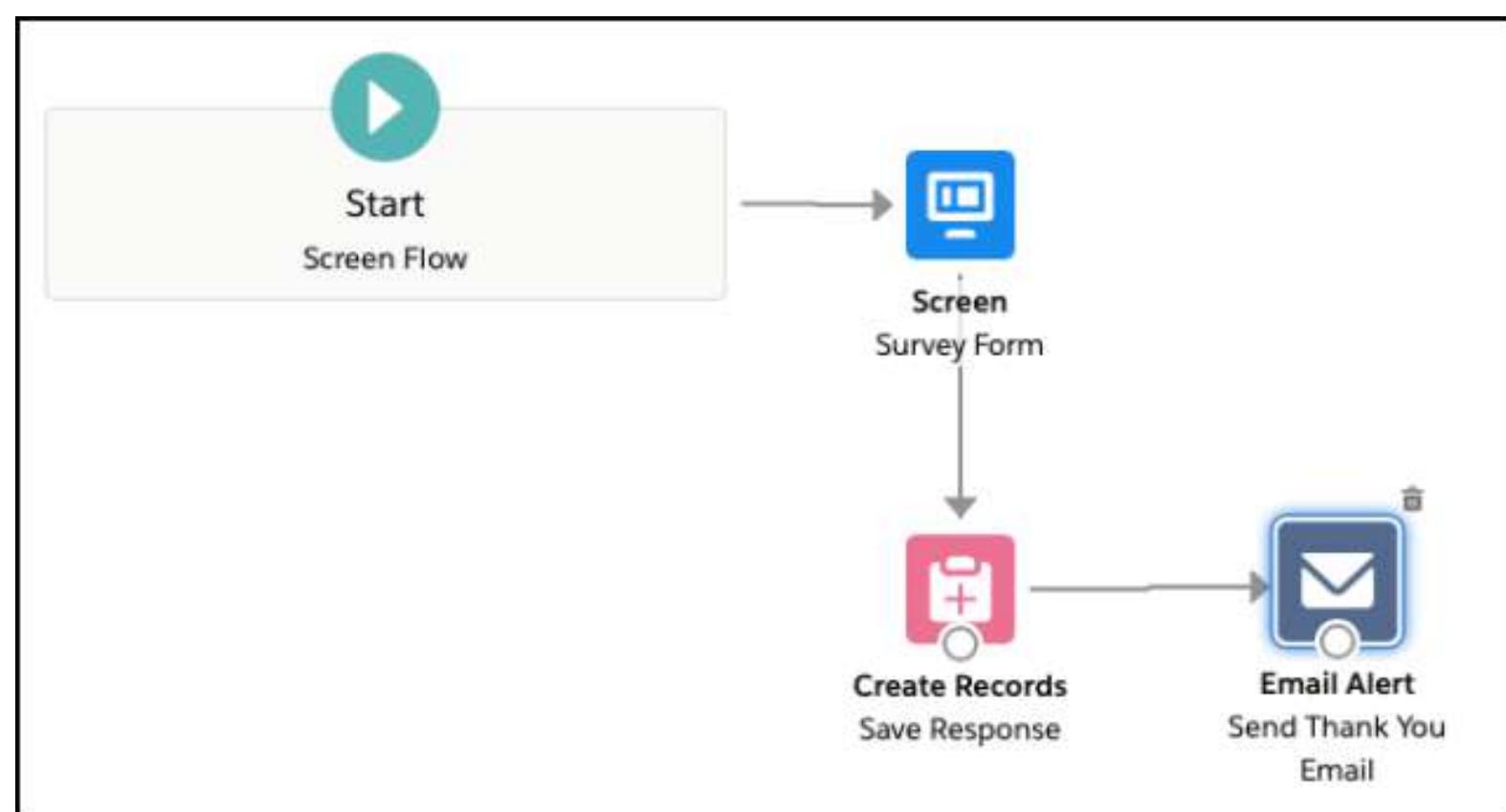
3. In the Action box, type Survey- Thank You Email.

4. Clicks on the Survey- Thank You Email email alert.

5. Click Done.



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: Survey {!\$Flow.CurrentDateTime}

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

Status: Active Type: Screen Flow Version Number: 2

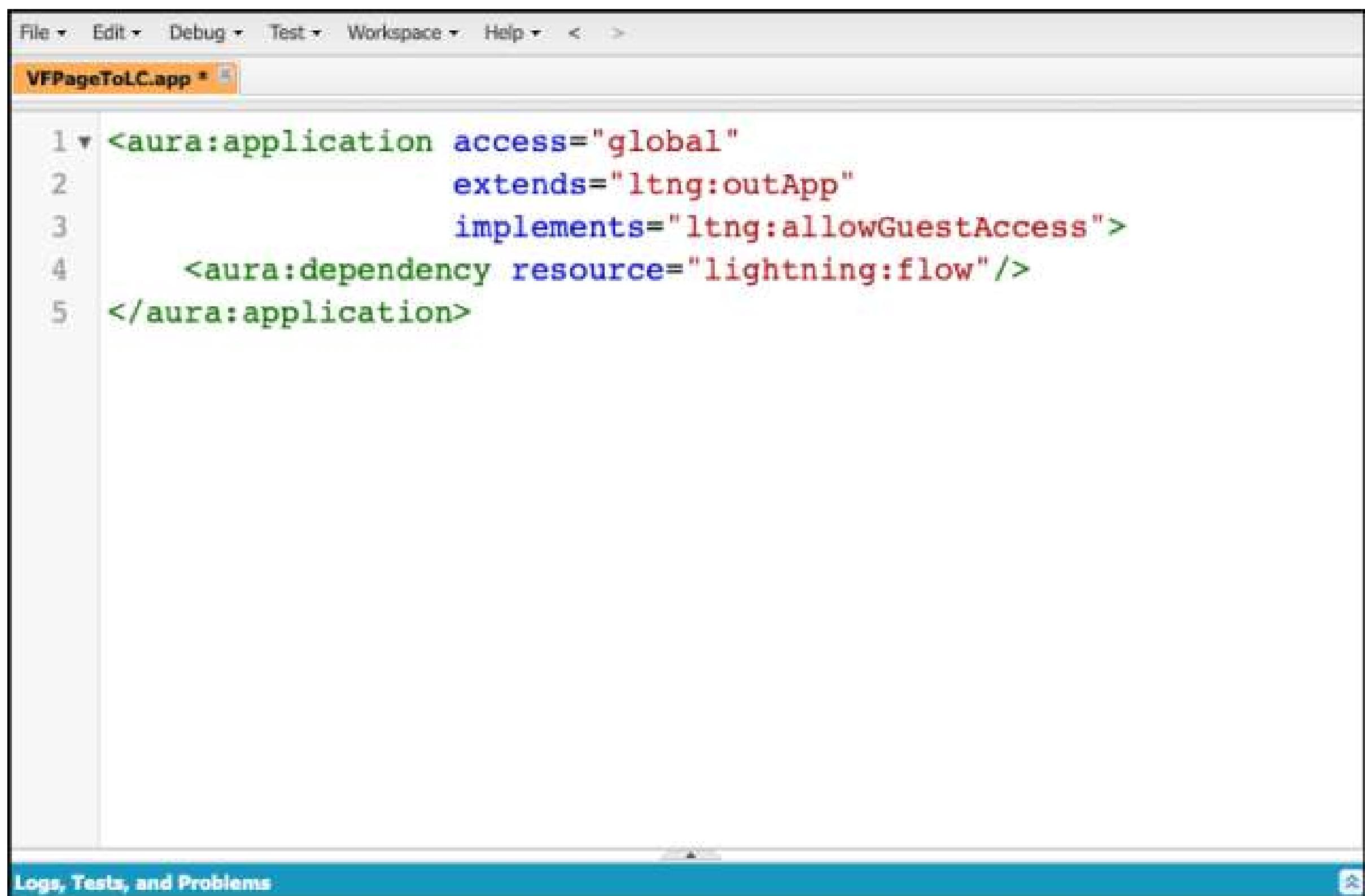
Cancel Save

The screenshot shows the 'Save as' dialog for a new flow named 'Survey'. It includes fields for Flow Label (Survey), Flow API Name (Survey), Description, and Interview Label (Survey {!\$Flow.CurrentDateTime}). Advanced settings like 'How to Run the Flow' (User or System Context—Depends on How Flow is Launched) and 'Type' (Screen Flow) are also visible. The bottom section displays last modified information (12/21/2020, 4:54 PM by Rakesh Gupta), status (Active), type (Screen Flow), and version number (2). Buttons for 'Cancel' and 'Save' are at the bottom right.

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 `LightningOut Dependency` App checkbox.
4. Click Submit.
5. Copy code from [GitHub](#) and paste it into your Lightning Application.
6. Save your code.



```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
VFPPageToLC.app * 3
1 <aura:application access="global"
2           extends="ltng:outApp"
3           implements="ltng:allowGuestAccess">
4     <aura:dependency resource="lightning:flow"/>
5   </aura:application>
Logs, Tests, and Problems
```

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 Editor interface. At the top, there's a header with 'Visualforce Page' and the page name 'Survey'. Below the header is a 'Page Edit' toolbar with buttons for 'Save', 'Quick Save', 'Cancel', 'Where is this used?', 'Component Reference', and 'Preview'. The main area is divided into sections: 'Page Information' (Label: Survey, Name: Survey, Description: empty), 'Available for Lightning Experience, Experience Builder sites, and the mobile app' (checkbox checked), and 'Requires CSRF protection on GET requests' (checkbox unchecked). Below these sections is a tab bar with 'Visualforce Markup' (selected) and 'Version Settings'. The 'Visualforce Markup' tab contains the following code:

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

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

Proof of Concept

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

Survey

Name

First Name

Alok

Last Name

Sinfal

*Email

*Rating

5

*Comment

Awesome Blog

G

Next

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

