Naan Mudhalvan

Salesforce Developer(Course)

Assignment no 1

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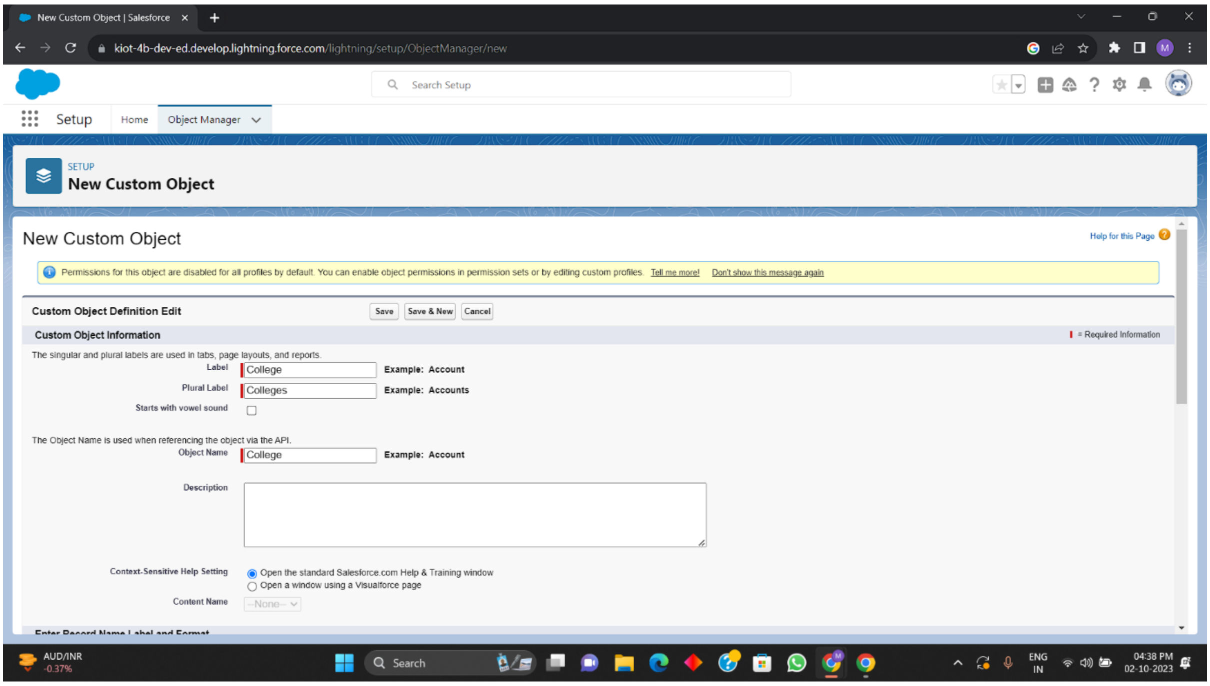
Year & Dept	:	4th year & CSE
Batch	:	2024
Zone no	:	Zone 8

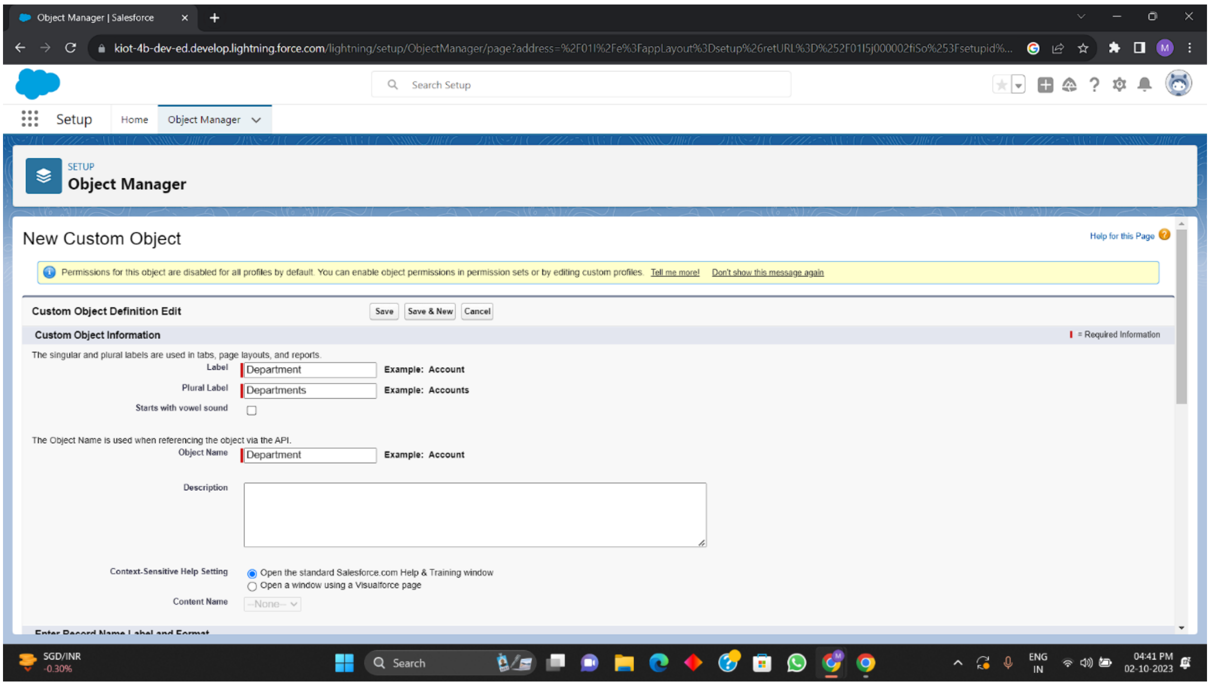
1. Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

Solution:
Step 1: Create Custom Objects

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



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



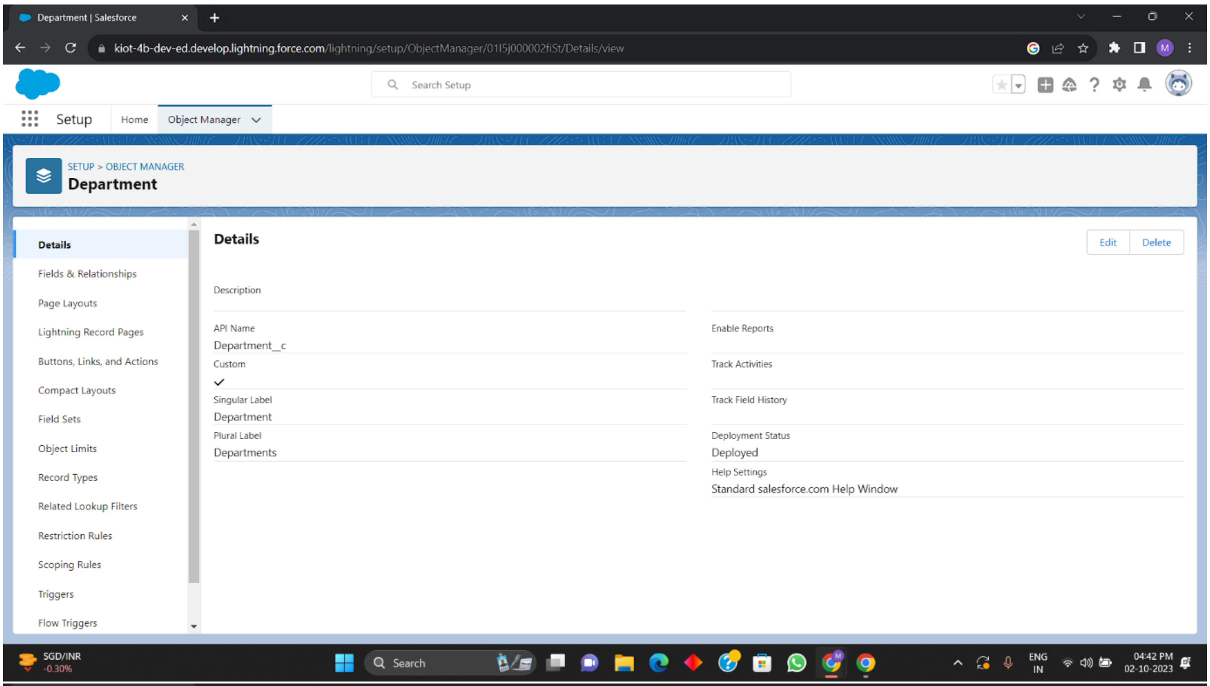
Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College__C" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."
4. Click the "New" button to create a new custom field.
5. Choose "Master-Detail Relationship" as the data type.
6. Enter a label for the relationship, e.g., "Department__C".

7. Choose " Department__C" as the related object.
8. Configure other settings as needed and click "Next."
9. Specify the field-level security and add it to relevant page layouts.

10. Click "Next" and "Save" to create the relationship.


Department | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002fiSt/Details/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Department
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
Details
Edit
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Description
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Department__c
Custom
Singular Label
Department
Plural Label
Departments
Enable Reports
Track Activities
Track Field History
Deployment Status
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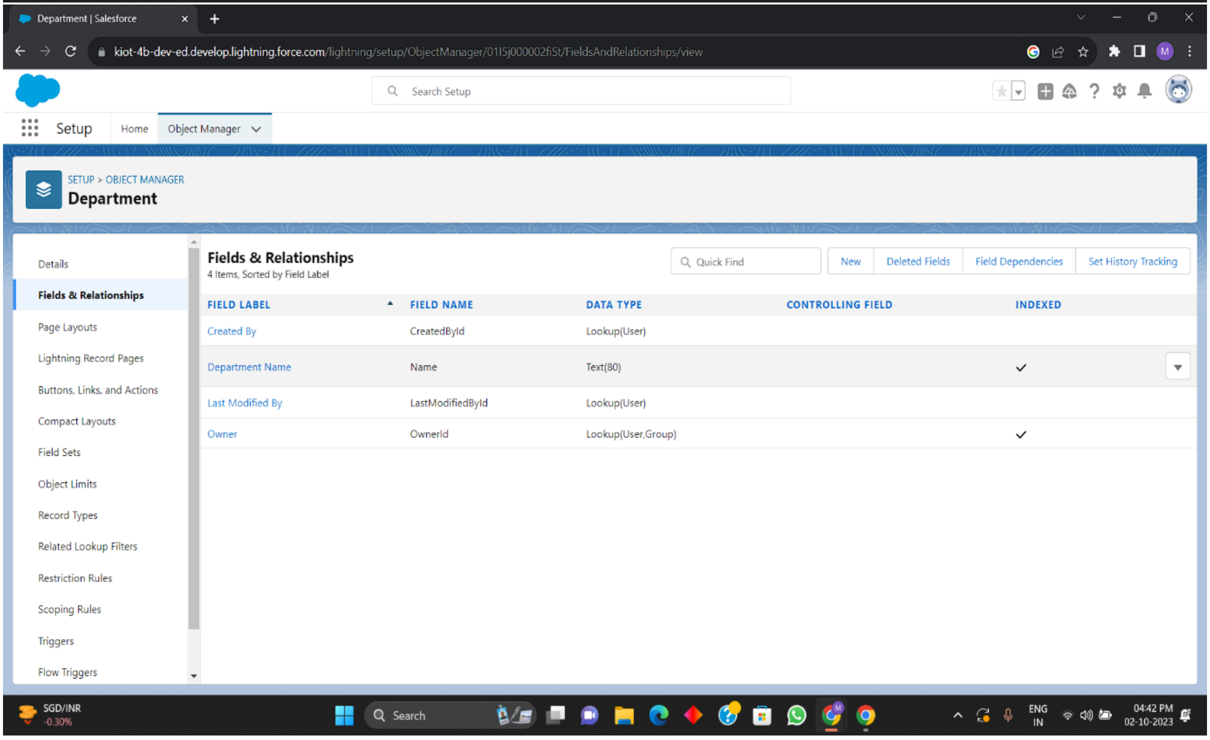
Department | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002fiSt/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Department
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Fields & Relationships
4 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Department Name
Name
Text(80)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
SGD/INR
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Search
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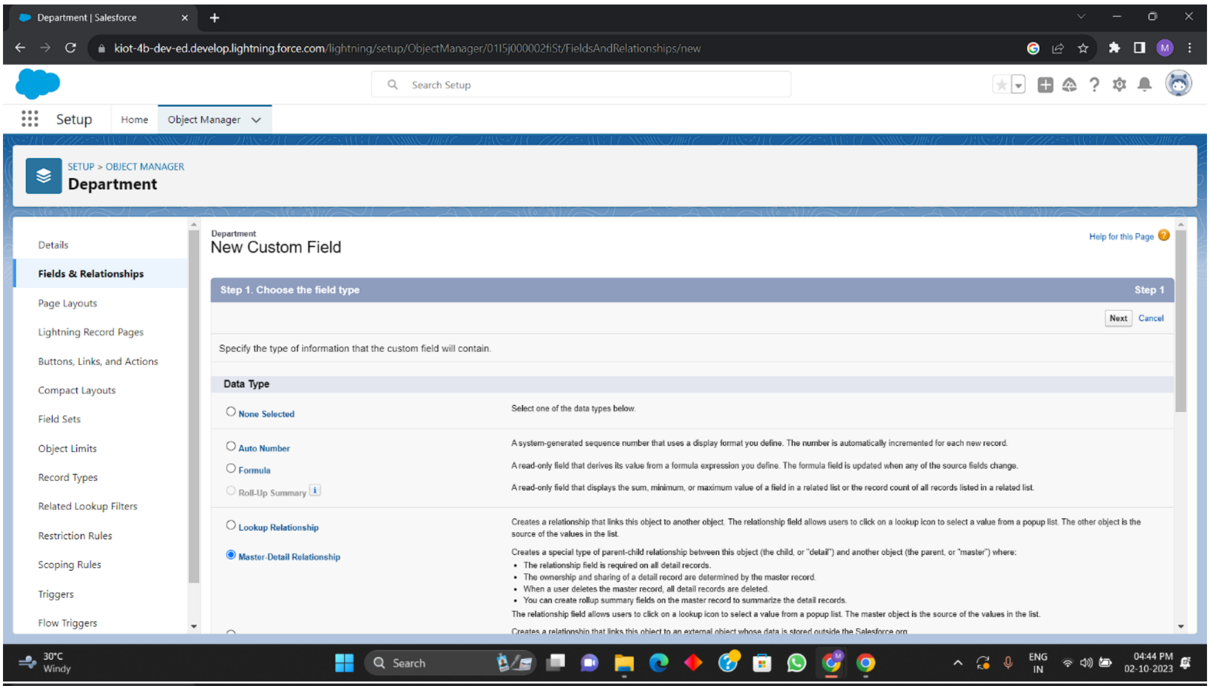
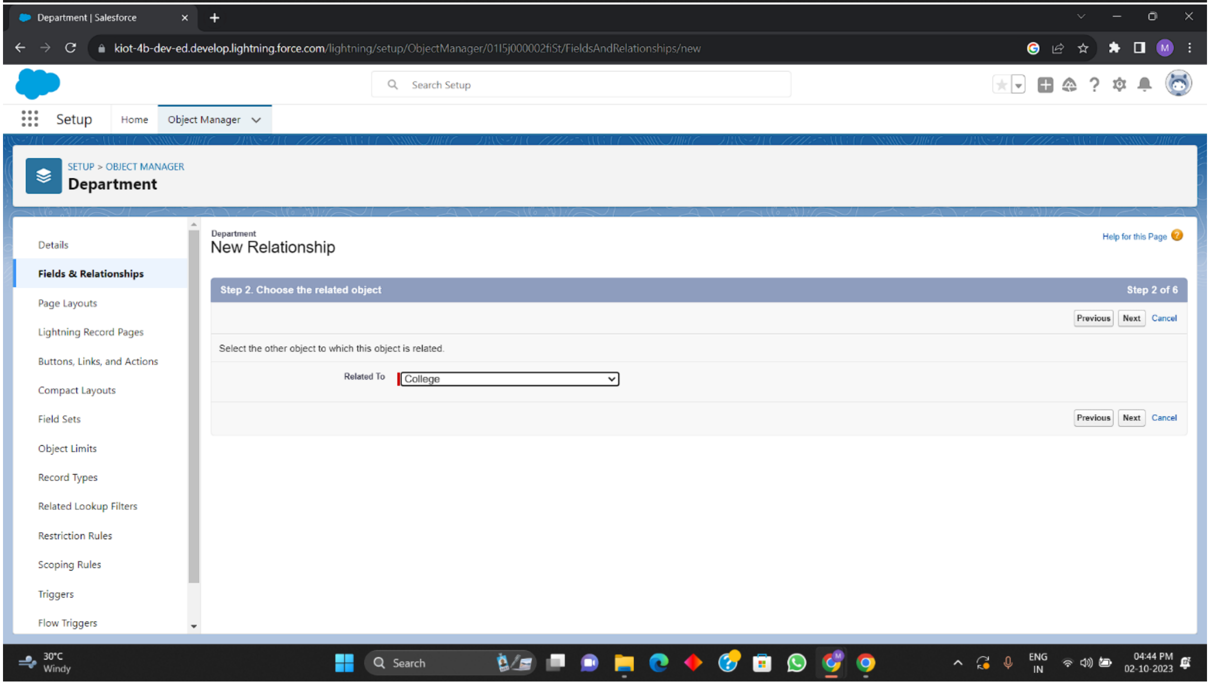




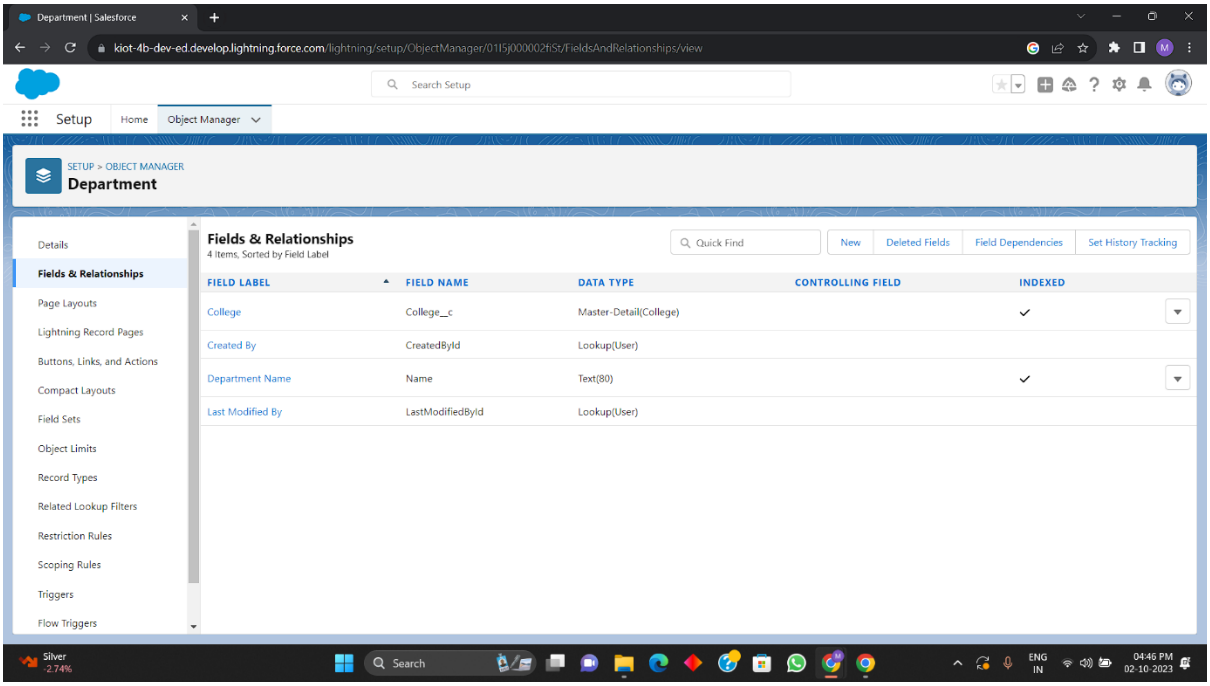
Step 3: Create the Roll-Up Summary Field

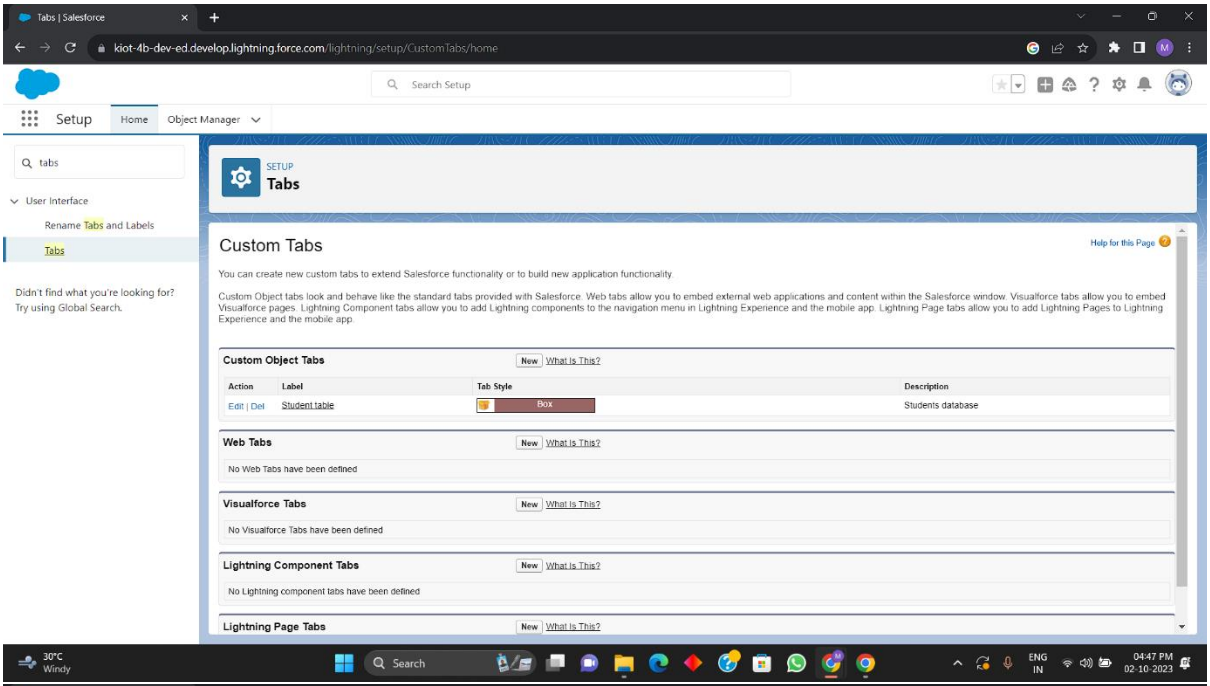
Now, let's create a Roll-Up Summary Field on the "College__C" to calculate the total number of related records in "Department__C":

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

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

10. Click "Next" and "Save" to create the Roll-Up Summary Field.




Tabs | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
Student table
Box
Students database
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
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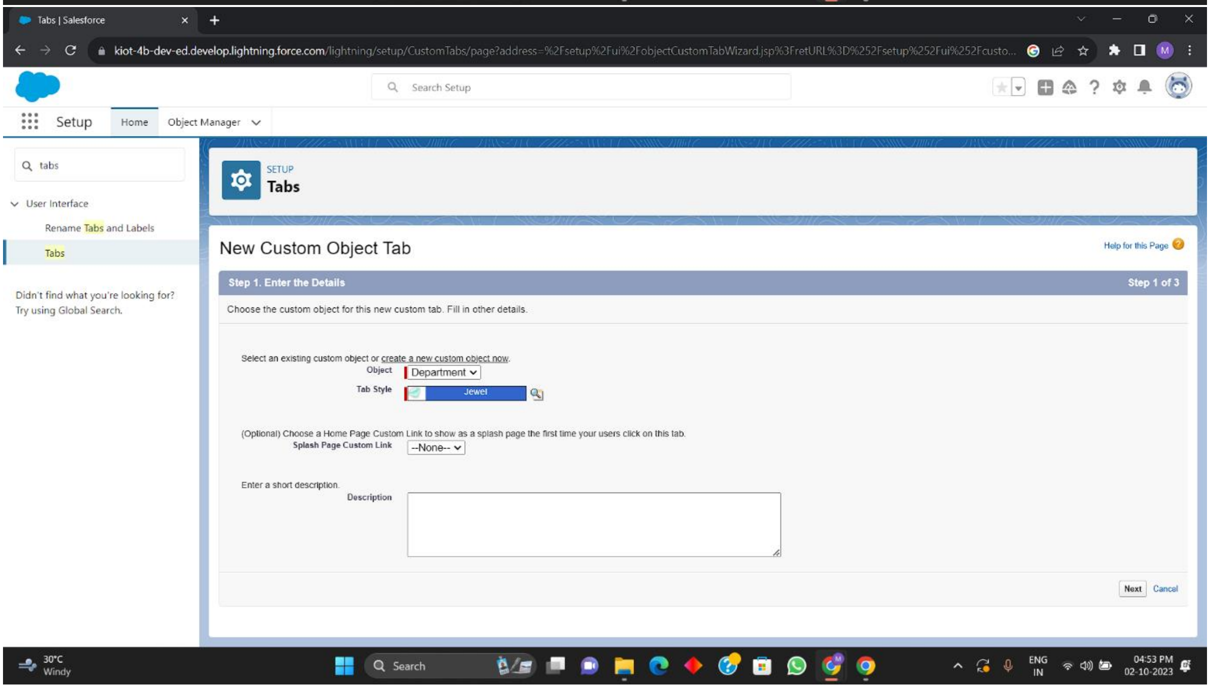
Tabs | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcusto...
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Department
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--
Enter a short description.
Description
Next
Cancel
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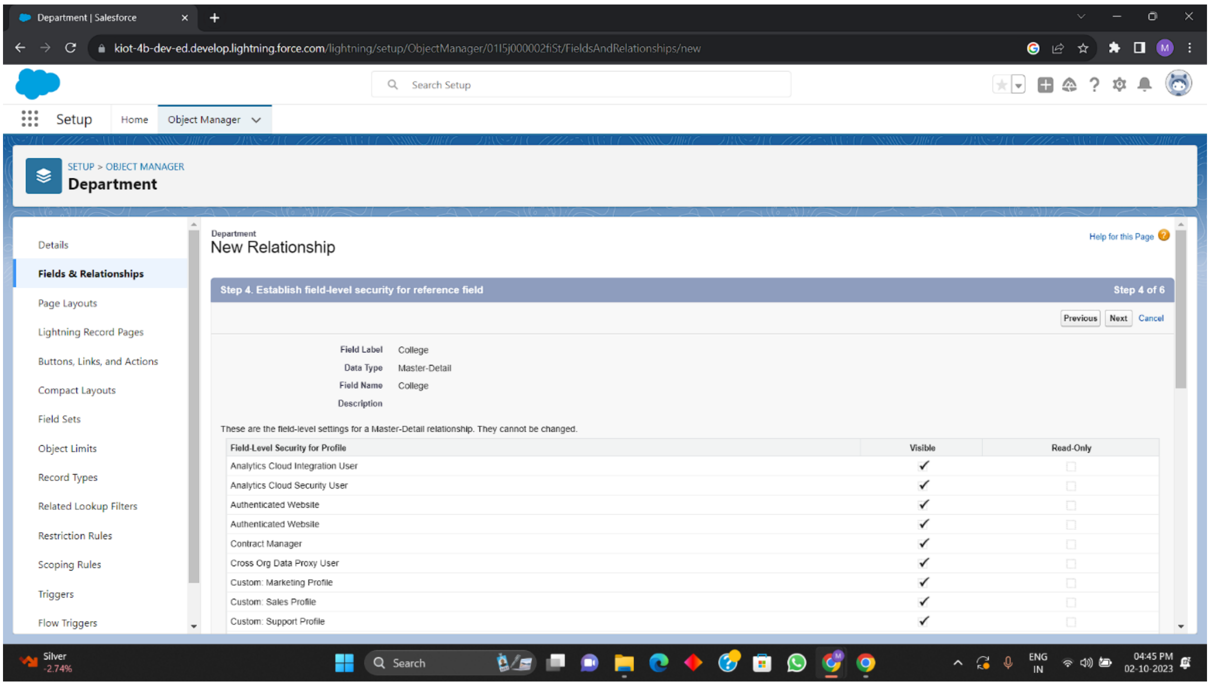
Department | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002fiSt/FieldsAndRelationships/new
Search Setup
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Home
Object Manager
SETUP > OBJECT MANAGER
Department
Details
Fields & Relationships
Page Layouts
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
Department
New Relationship
Help for this Page
Step 4. Establish field-level security for reference field
Step 4 of 6
Previous
Next
Cancel
Field Label College
Data Type Master-Detail
Field Name College
Description
These are the field-level settings for a Master-Detail relationship. They cannot be changed.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Silver
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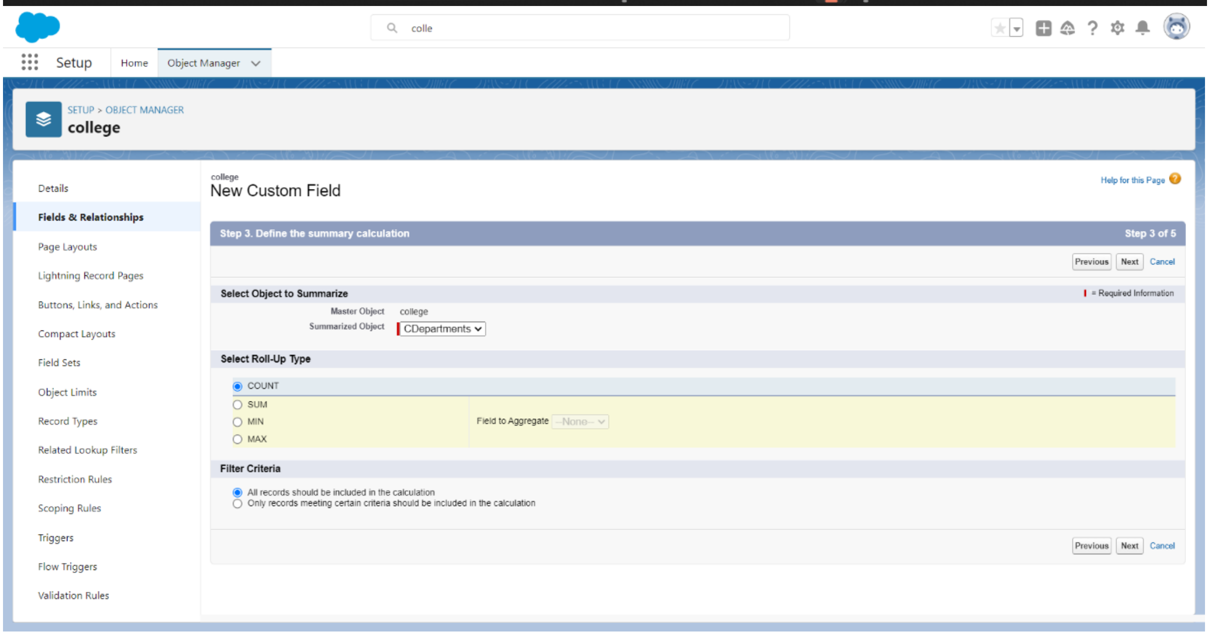
colle
Setup
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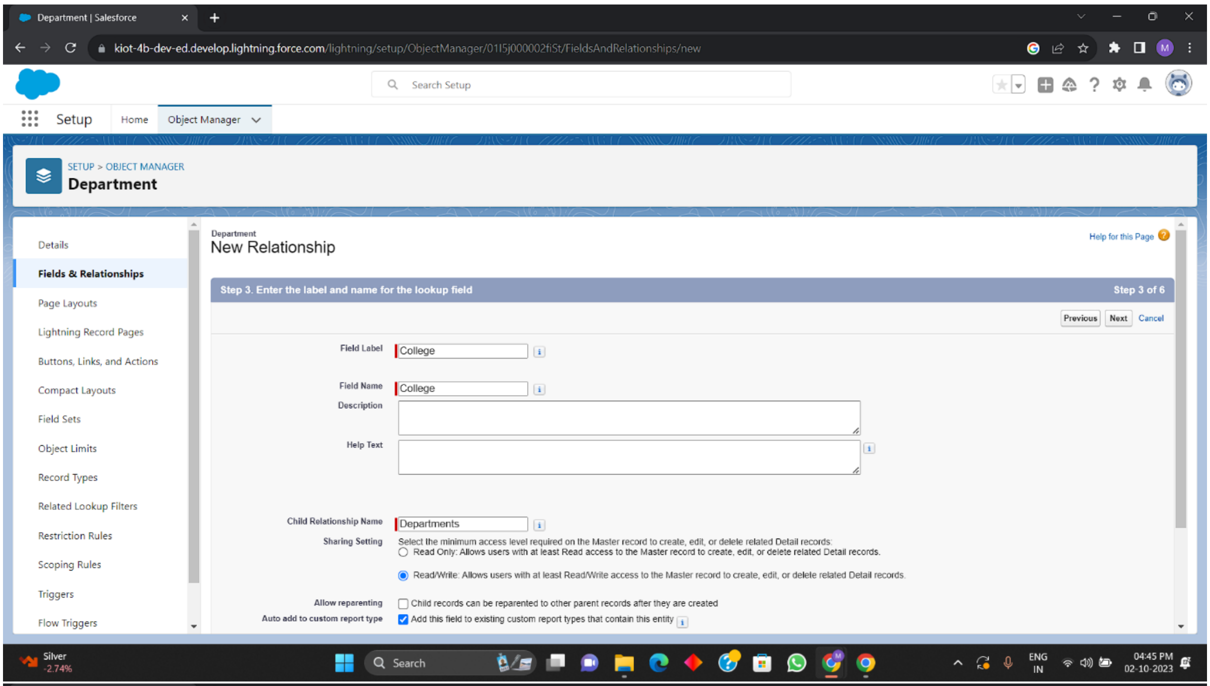
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 3. Define the summary calculation
Step 3 of 5
Previous
Next
Cancel
Select Object to Summarize
= Required Information
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
Previous
Next
Cancel


Department | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002fiSt/FieldsAndRelationships/new
Search Setup
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Home
Object Manager
SETUP > OBJECT MANAGER
Department
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
Department
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
College
Field Name
College
Description
Help Text
Child Relationship Name
Departments
Sharing Setting
Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting
Child records can be reparented to other parent records after they are created
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Silver
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Search
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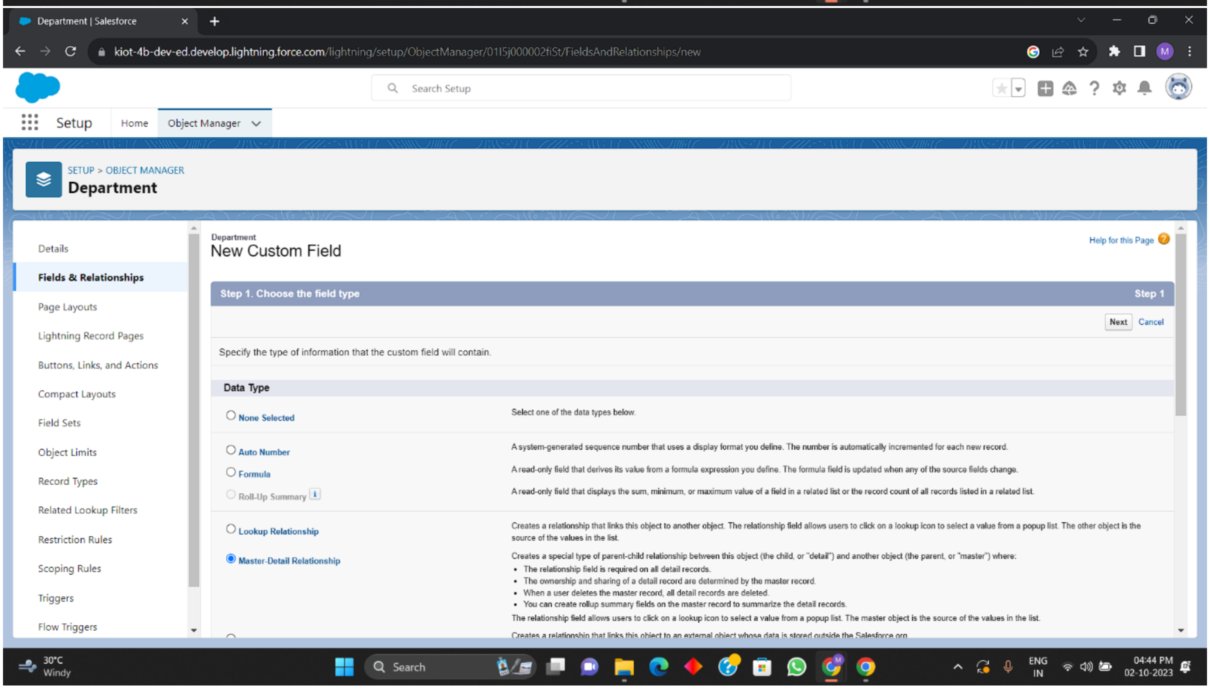
Department | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002fiSt/FieldsAndRelationships/new
Search Setup
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SETUP > OBJECT MANAGER
Department
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Department
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
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Search
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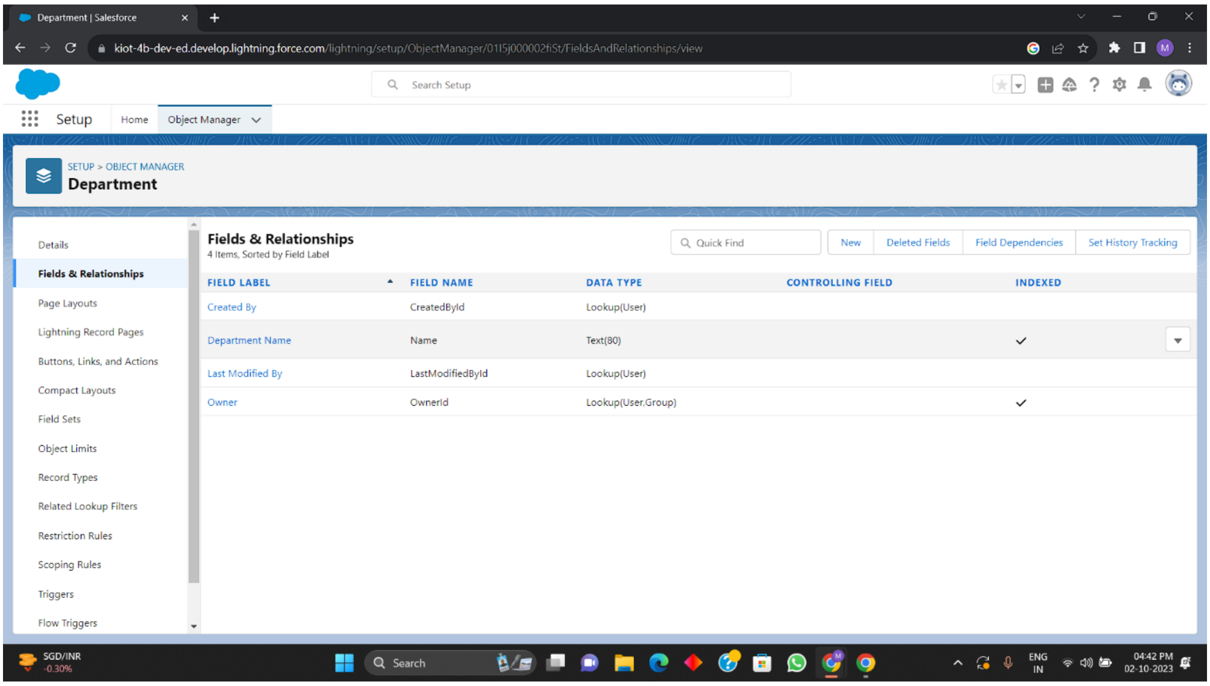
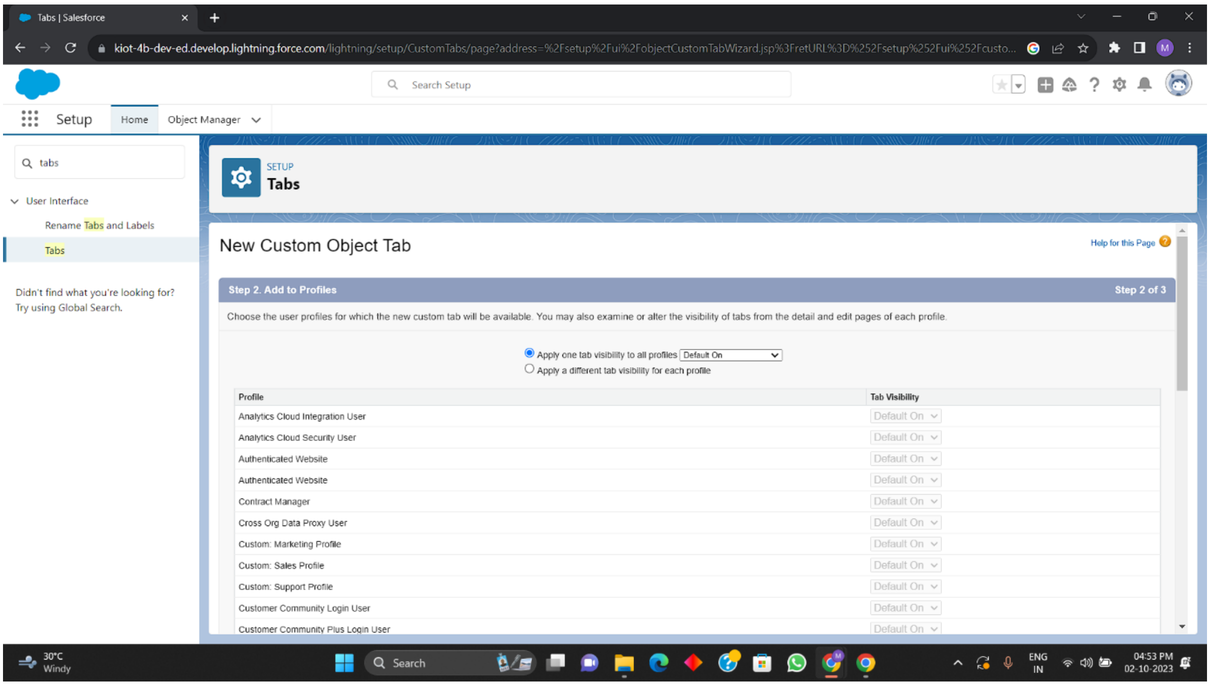


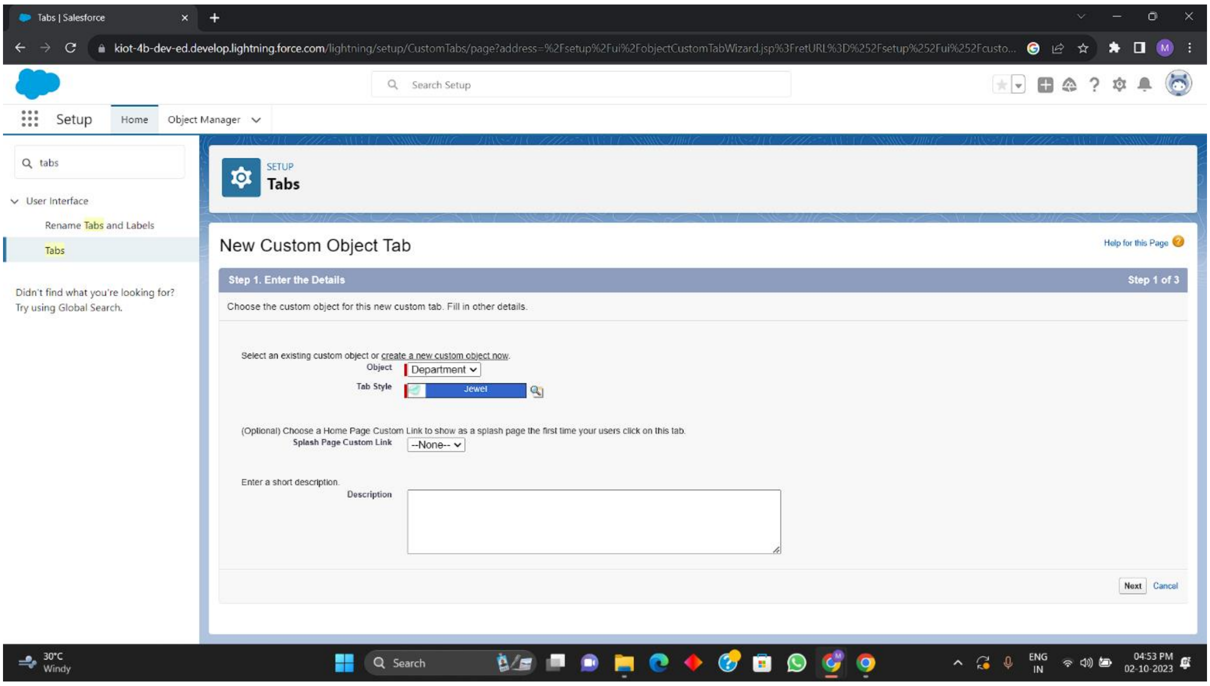
Step 4: Create a Lightning App

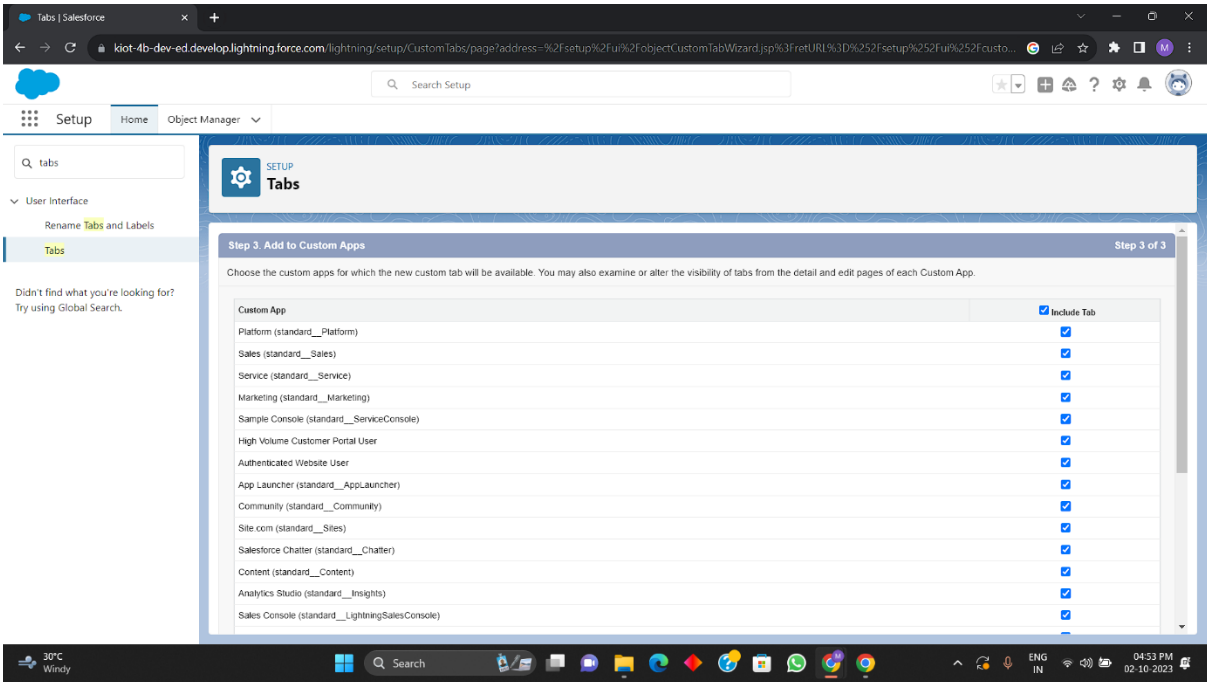
1. Type and select "App Manager."
2. Click "New Lightning App."
3. Fill in basic information (Name, Developer Name, Description).
4. Choose the App Type (Standard, Console, Custom).
5. Customize the Logo and Colour Scheme.
6. Configure Navigation Items (objects to appear in the app's menu).
7. Set the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






Tabs | Salesforce
Setup
Home
Object Manager
Search Setup
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
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)
Sales (standard__Sales)
Service (standard__Service)
Marketing (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
Sales Console (standard__LightningSalesConsole)
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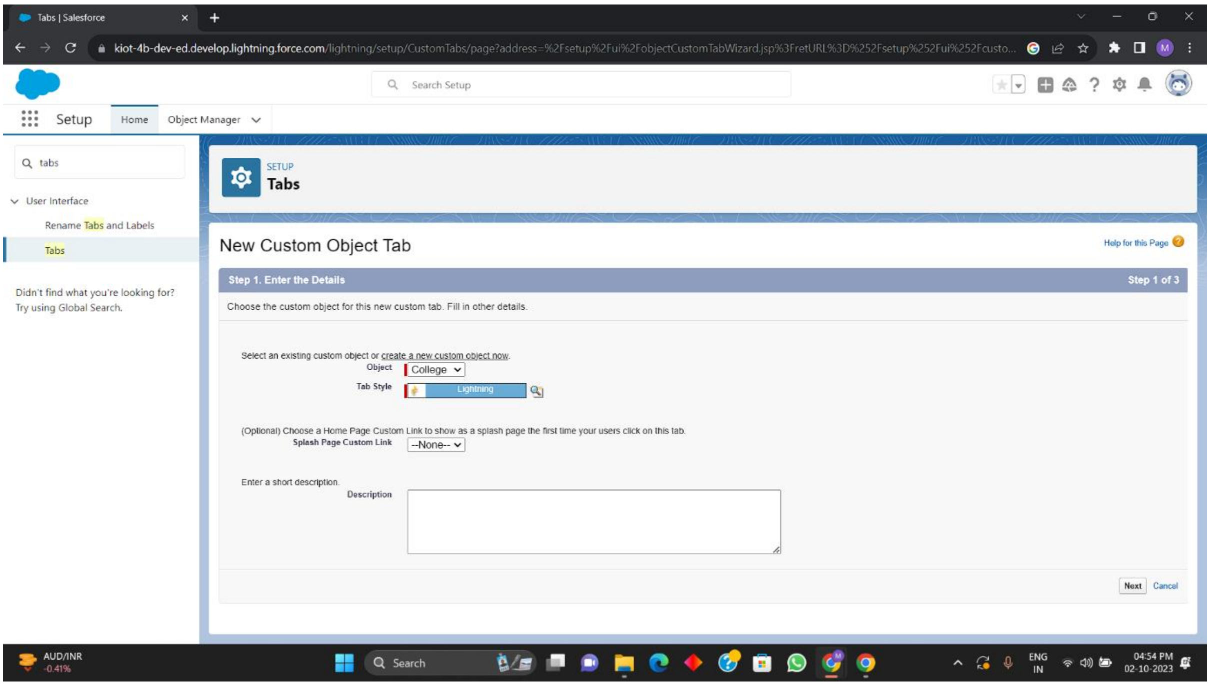
Tabs | Salesforce
Setup
Home
Object Manager
Search Setup
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
College
Tab Style
Lightning
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel
AUD/INR
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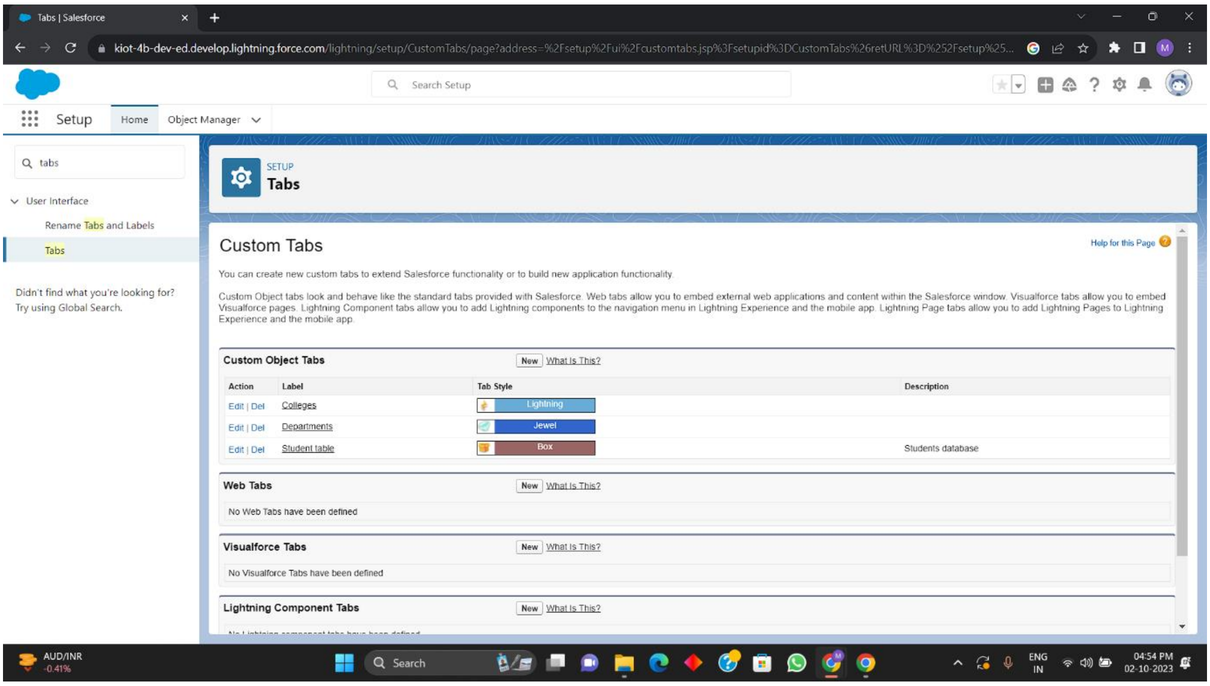
Tabs | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabs%26retURL%3D%252Fsetup%25...
Search Setup
Setup
Home
Object Manager
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User Interface
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Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
Colleges
Lightning
Edit | Del
Departments
Jewel
Edit | Del
Student table
Box
Students database
Web Tabs
New
What Is This?
No Web Tabs have been defined
Visualforce Tabs
New
What Is This?
No Visualforce Tabs have been defined
Lightning Component Tabs
New
What Is This?
AUD/INR
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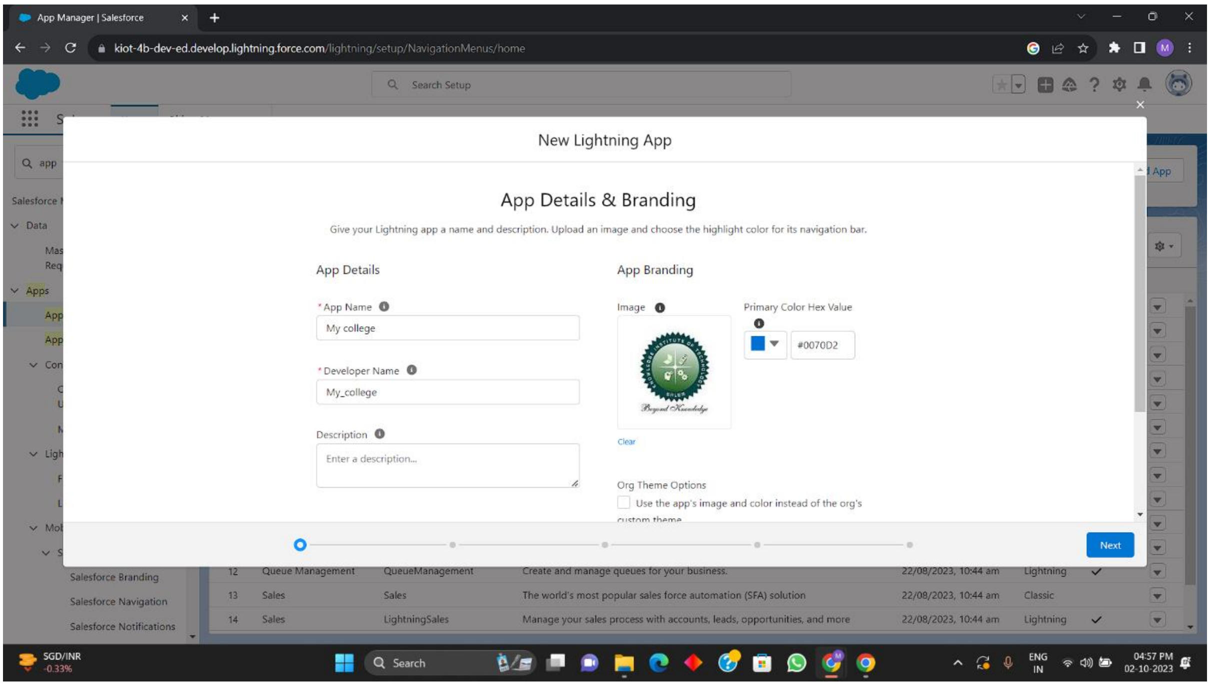
02-10-2023


App Manager | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
New Lightning App
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
* App Name
My college
Image
Primary Color Hex Value
#0070D2
* Developer Name
My_college
Clear
Description
Enter a description...
Org Theme Options
Use the app's image and color instead of the org's custom theme
Next
Salesforce Branding
Salesforce Navigation
Salesforce Notifications
12
Queue Management
QueueManagement
Create and manage queues for your business.
22/08/2023, 10:44 am
Lightning
13
Sales
Sales
The world's most popular sales force automation (SFA) solution
22/08/2023, 10:44 am
Classic
14
Sales
LightningSales
Manage your sales process with accounts, leads, opportunities, and more
22/08/2023, 10:44 am
Lightning
SGD/INR
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Search
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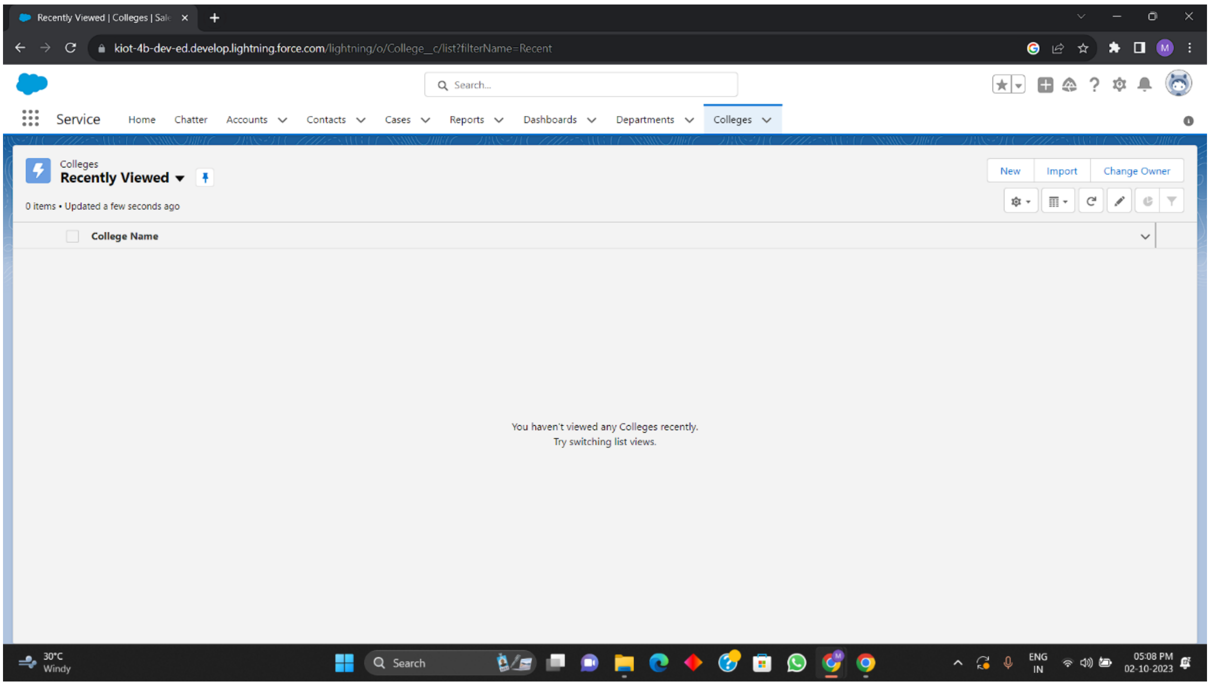
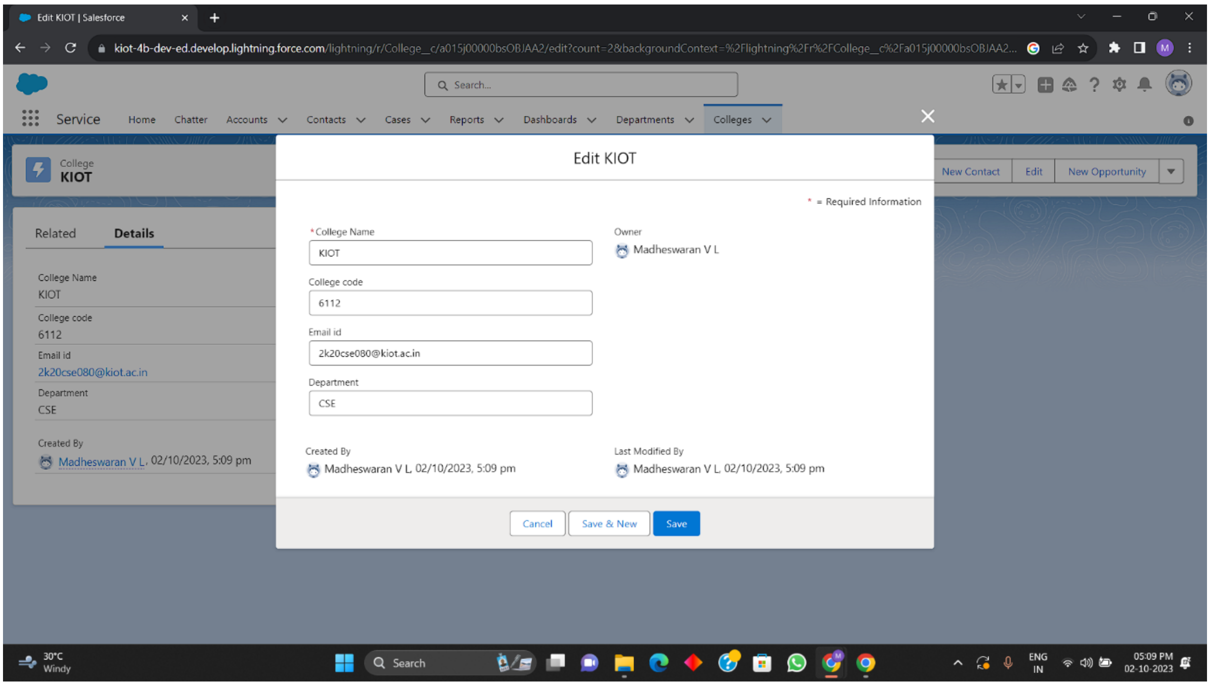
02-10-2023

Conclusion:

Now, whenever you create or update a record in the "Department__C" related to a "College__C," the "Total Count" field on the "College__C" will automatically update to show the total number of related records.

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




Edit KIOT | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/r/College__c/a015j00000bsOBJAA2/edit?count=2&backgroundContext=%2Flightning%2Fr%2FCollege__c%2Fa015j00000bsOBJAA2...
Service
Home
Chatter
Accounts
Contacts
Cases
Reports
Dashboards
Departments
Colleges
College
KIOT
Related
Details
Edit KIOT
* = Required Information
* College Name
KIOT
College code
6112
Email id
2k20cse080@kiot.ac.in
Department
CSE
Owner
Madheswaran V L
Created By
Madheswaran V L, 02/10/2023, 5:09 pm
Last Modified By
Madheswaran V L, 02/10/2023, 5:09 pm
Cancel
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New Contact
Edit
New Opportunity
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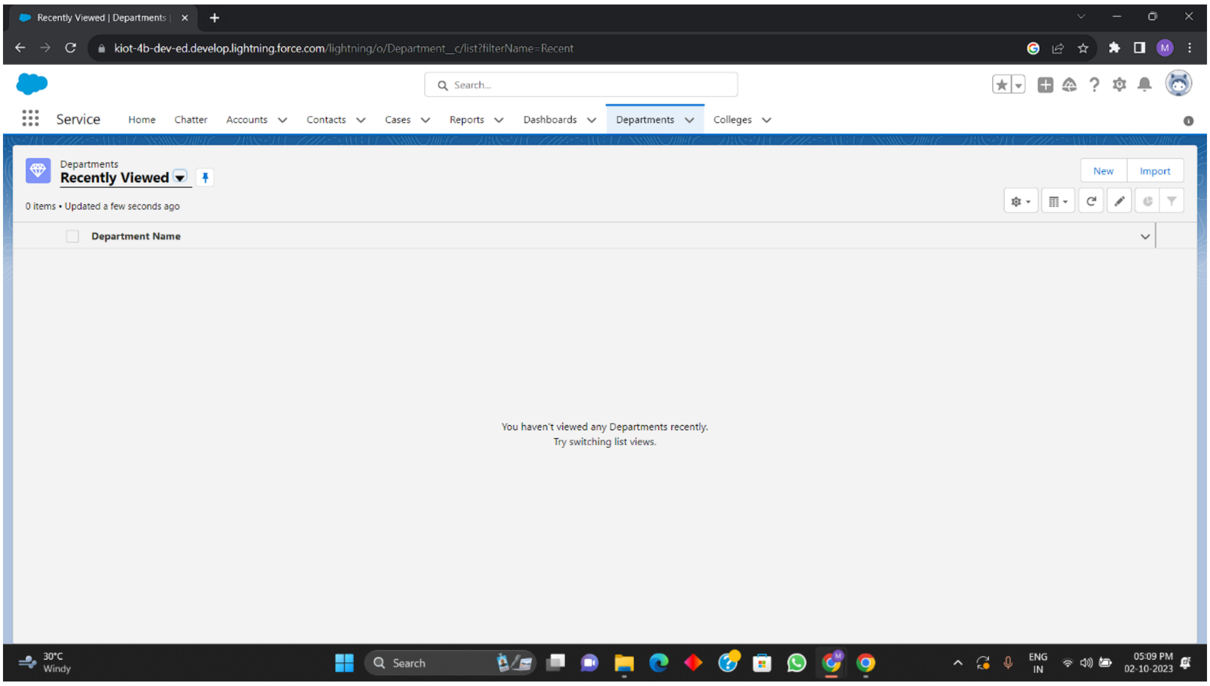
Recently Viewed | Departments
kiot-4b-dev-ed.develop.lightning.force.com/lightning/o/Department__c/list?filterName=Recent
Service
Home
Chatter
Accounts
Contacts
Cases
Reports
Dashboards
Departments
Colleges
Departments
Recently Viewed
0 items • Updated a few seconds ago
New
Import
Department Name
You haven't viewed any Departments recently.
Try switching list views.
30°C
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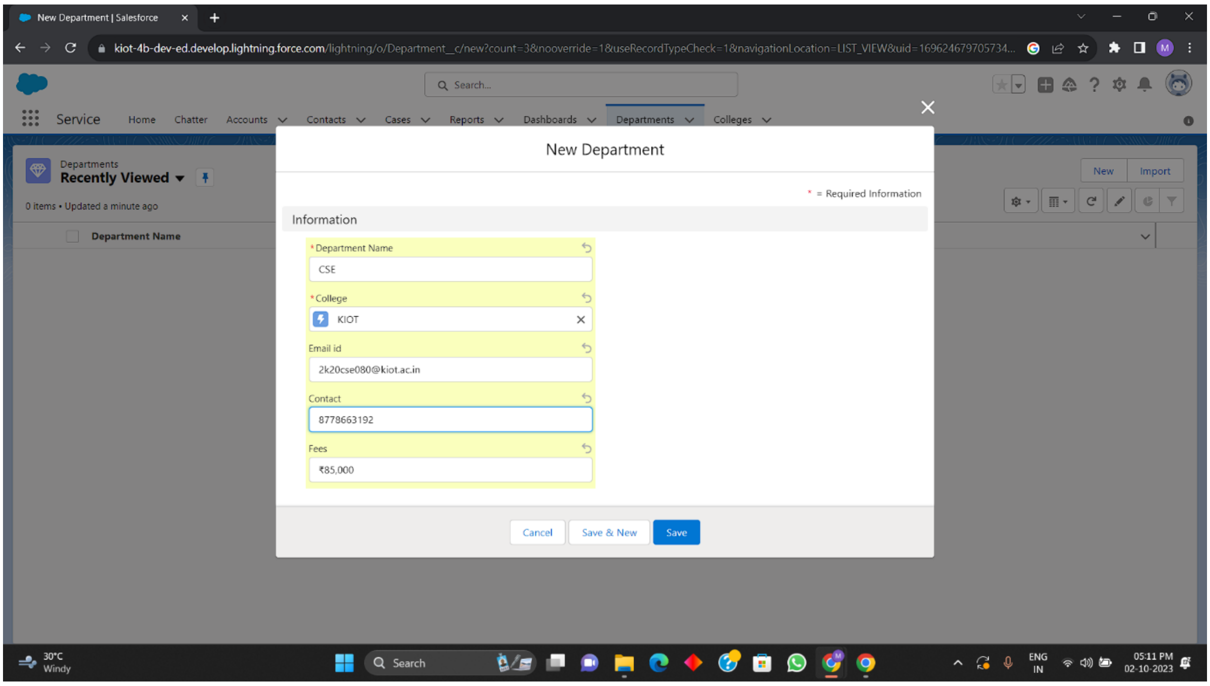
New Department | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/o/Department__c/new?count=3&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169624679705734...
Service
Home
Chatter
Accounts
Contacts
Cases
Reports
Dashboards
Departments
Colleges
Departments
Recently Viewed
0 items • Updated a minute ago
Department Name
New
Import
New Department
* = Required Information
Information
* Department Name
CSE
* College
KIOT
Email id
2k20cse080@kiot.ac.in
Contact
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Cancel
Save & New
Save
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Search
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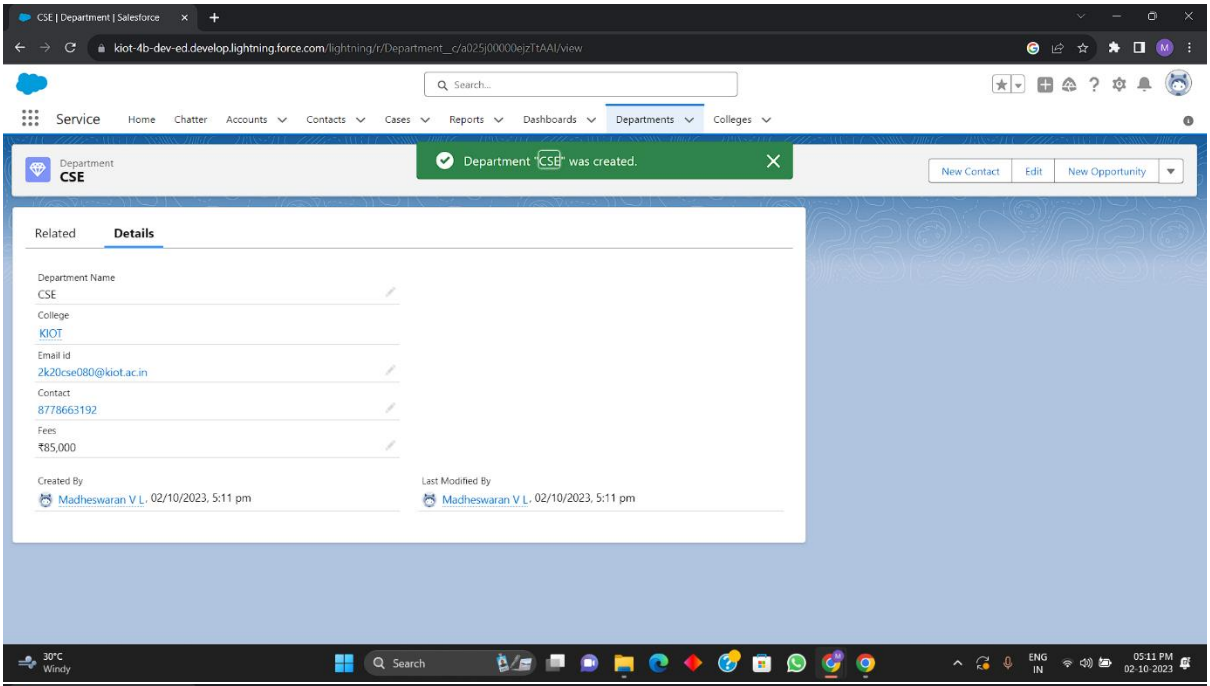
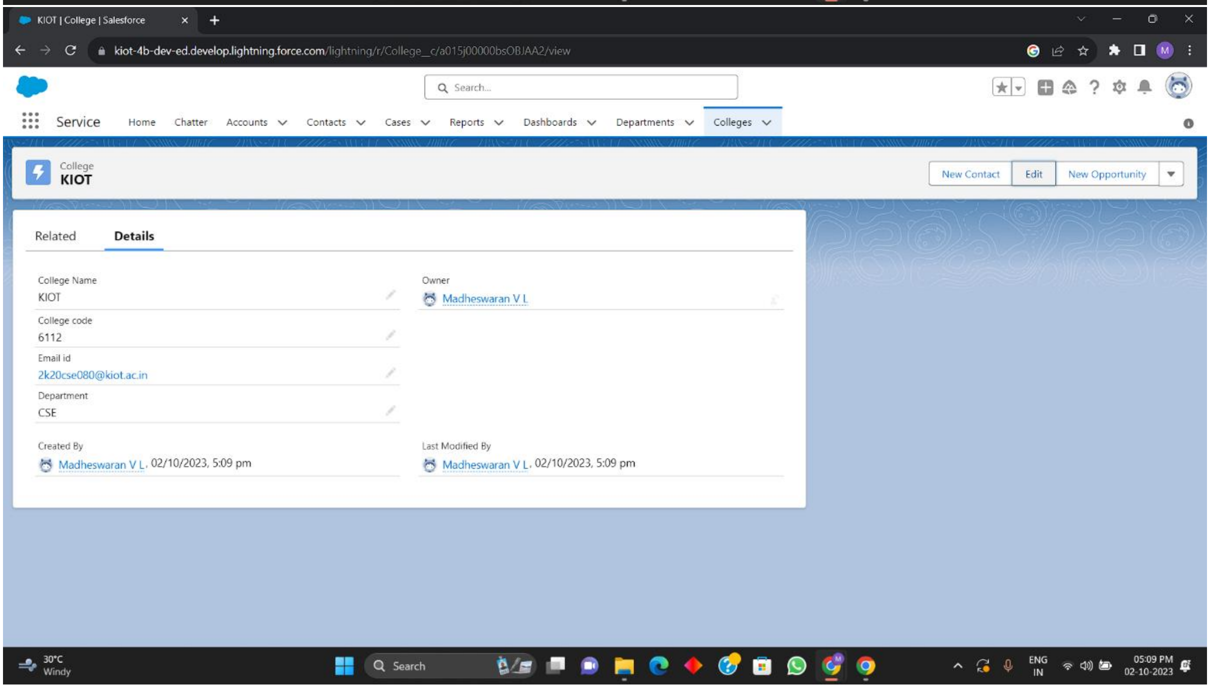
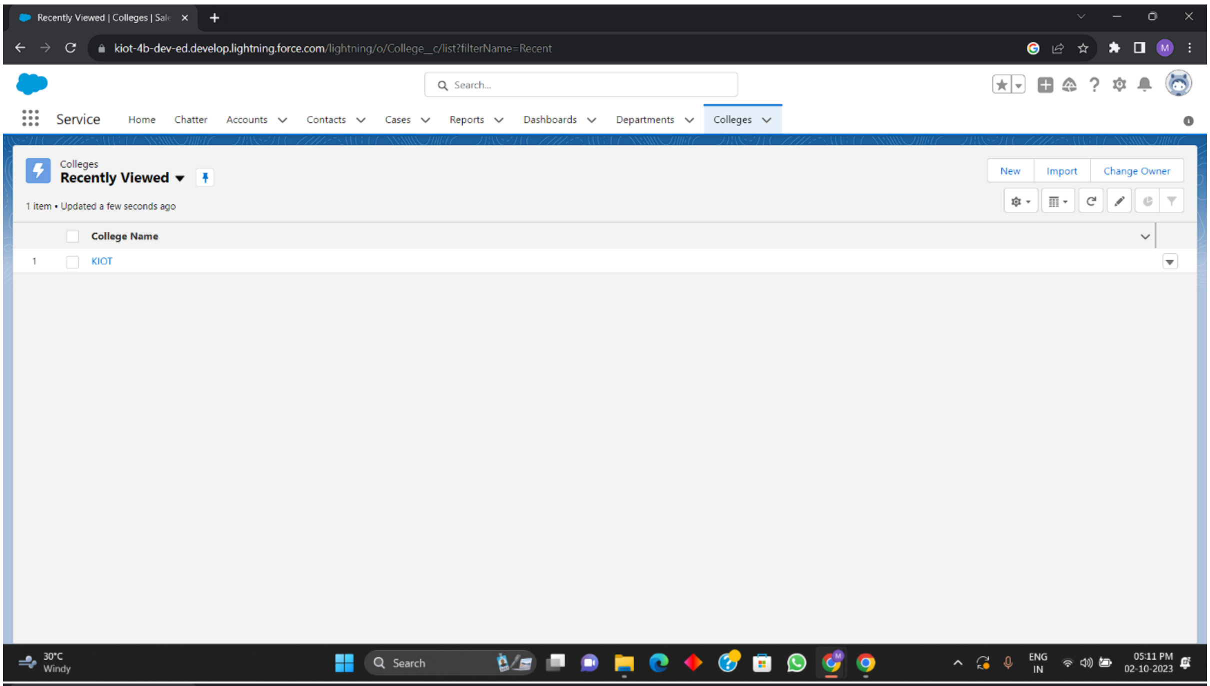
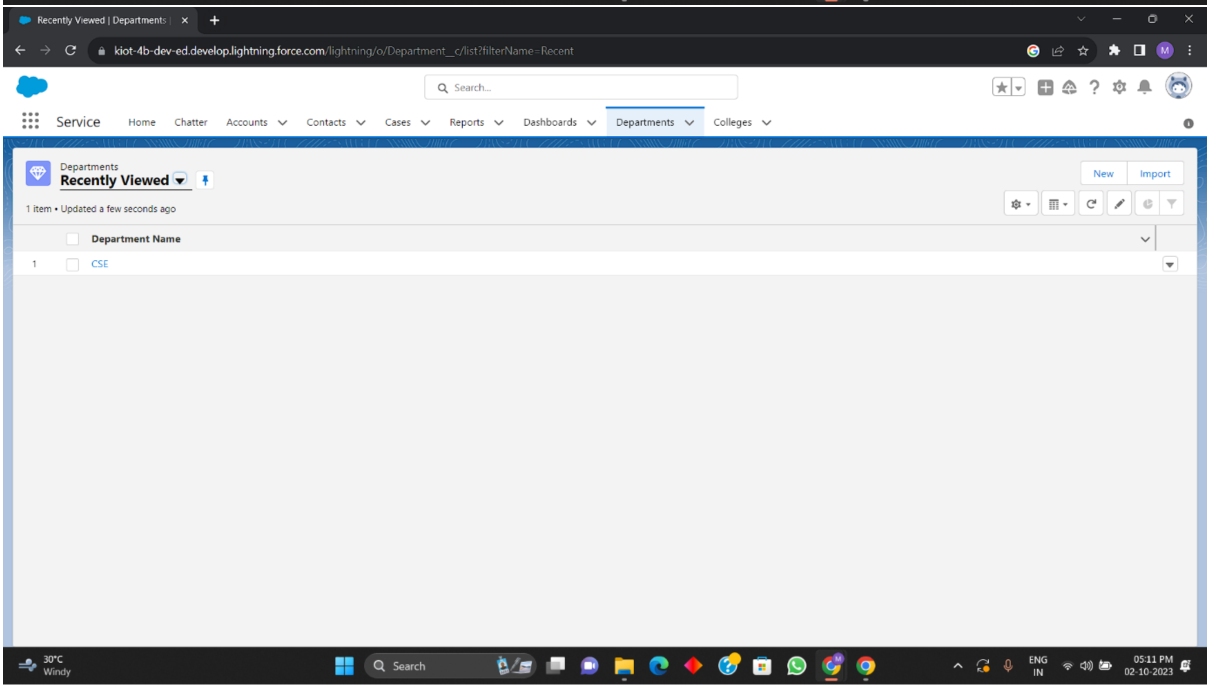

CSE | Department | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/r/Department__c/a025j00000ejzTtAAI/view
Search...
Service
Home
Chatter
Accounts
Contacts
Cases
Reports
Dashboards
Departments
Colleges
Department
CSE
Department "CSE" was created.
New Contact
Edit
New Opportunity
Related
Details
Department Name
CSE
College
KIOT
Email id
2k20cse080@kiot.ac.in
Contact
8778663192
Fees
₹85,000
Created By
Madheswaran V L, 02/10/2023, 5:11 pm
Last Modified By
Madheswaran V L, 02/10/2023, 5:11 pm
30°C
Windy
Search
ENG
IN
05:11 PM
02-10-2023


KIOT | College | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/r/College__c/a015j00000bsOBJAA2/view
Search...
Service
Home
Chatter
Accounts
Contacts
Cases
Reports
Dashboards
Departments
Colleges
College
KIOT
New Contact
Edit
New Opportunity
Related
Details
College Name
KIOT
Owner
Madheswaran V L
College code
6112
Email id
2k20cse080@kiot.ac.in
Department
CSE
Created By
Madheswaran V L, 02/10/2023, 5:09 pm
Last Modified By
Madheswaran V L, 02/10/2023, 5:09 pm
30°C
Windy
Search
ENG
IN
05:09 PM
02-10-2023

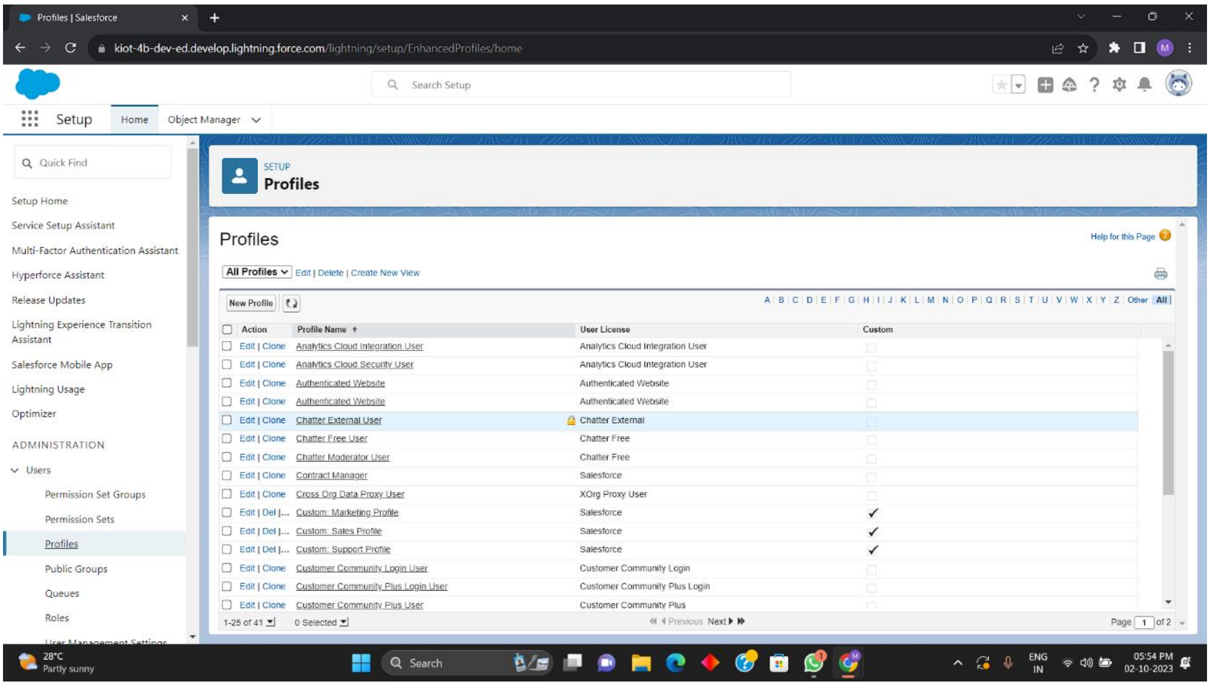

Recently Viewed | Colleges | Sal
kiot-4b-dev-ed.develop.lightning.force.com/lightning/o/College__c/list?filterName=Recent
Search...
Service
Home
Chatter
Accounts
Contacts
Cases
Reports
Dashboards
Departments
Colleges
Colleges
Recently Viewed
New
Import
Change Owner
1 item • Updated a few seconds ago
College Name
1
KIOT
30°C
Windy
Search
ENG
IN
05:11 PM
02-10-2023

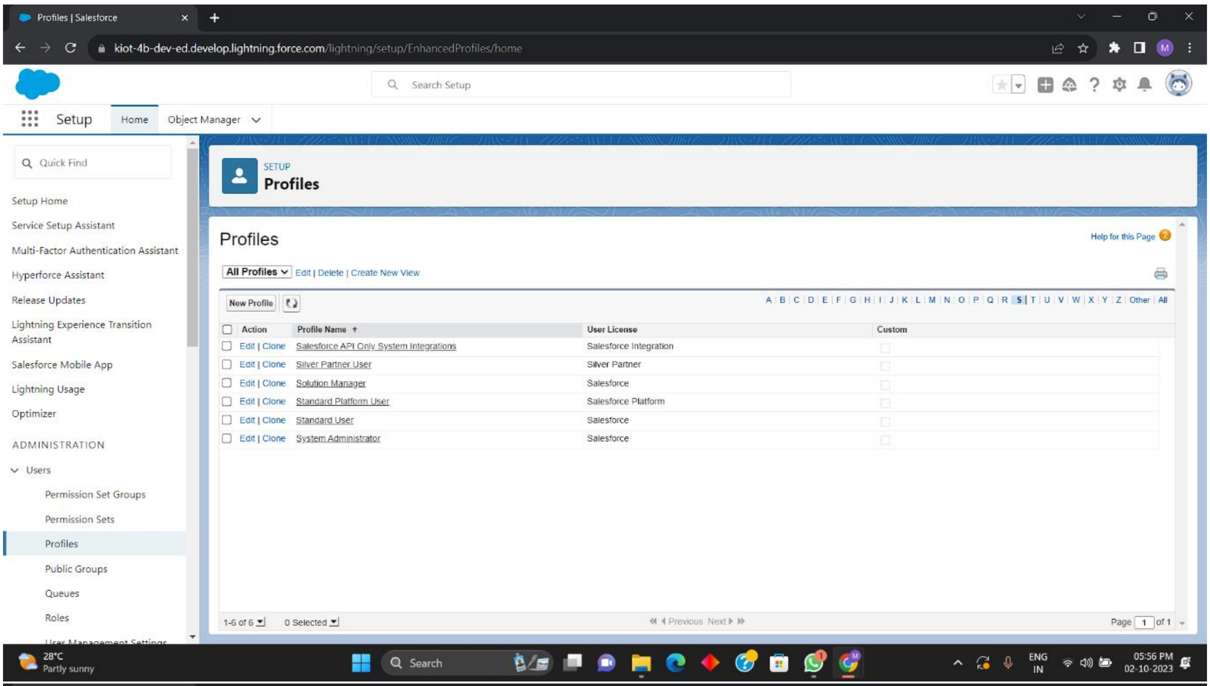

Recently Viewed | Departments |
kiot-4b-dev-ed.develop.lightning.force.com/lightning/o/Department__c/list?filterName=Recent
Search...
Service
Home
Chatter
Accounts
Contacts
Cases
Reports
Dashboards
Departments
Colleges
Departments
Recently Viewed
New
Import
1 item • Updated a few seconds ago
Department Name
1
CSE
30°C
Windy
Search
ENG
IN
05:11 PM
02-10-2023

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.

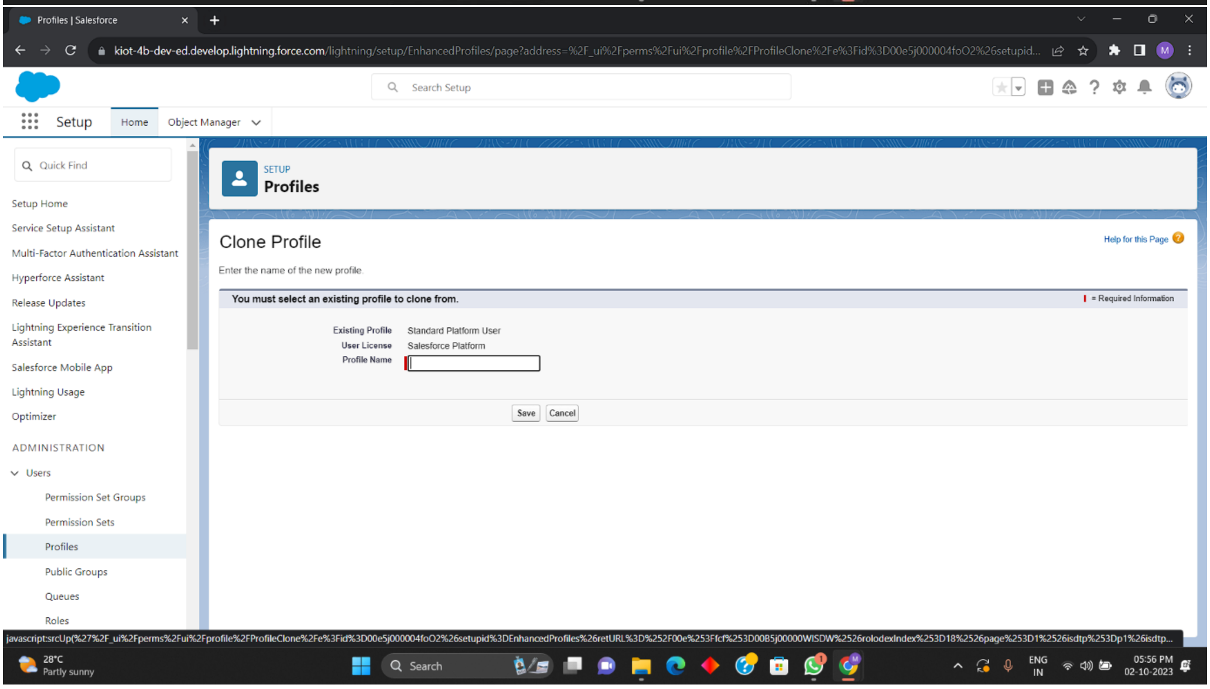
Solution:

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

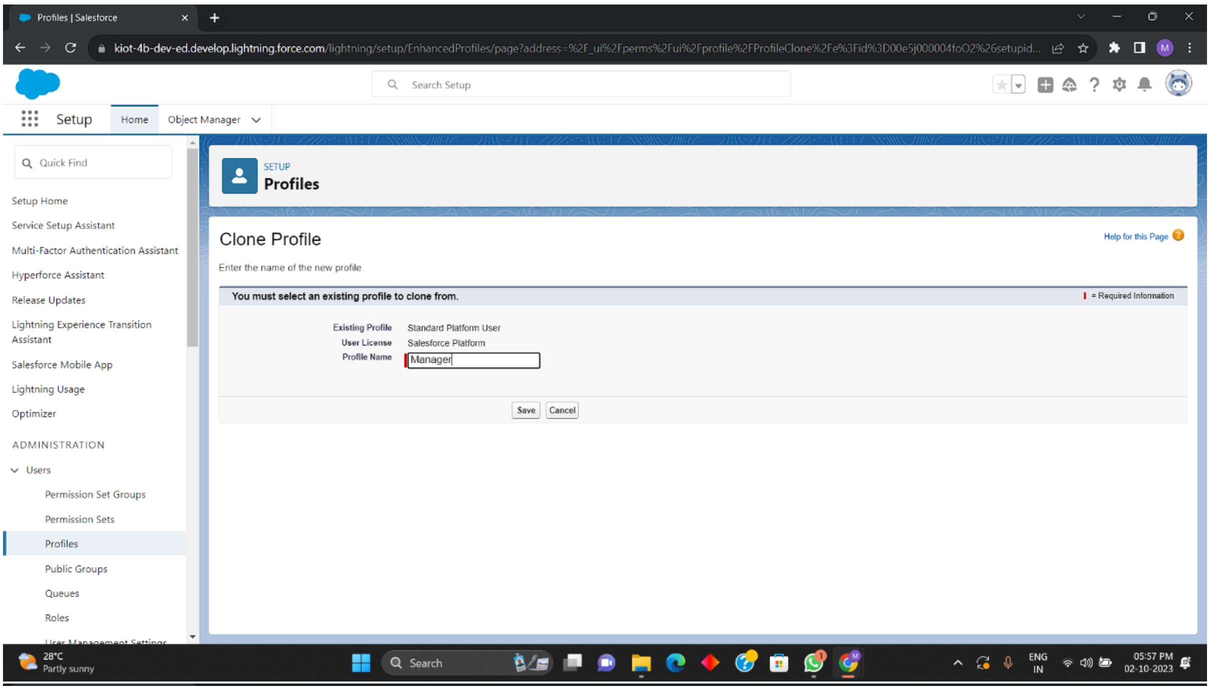


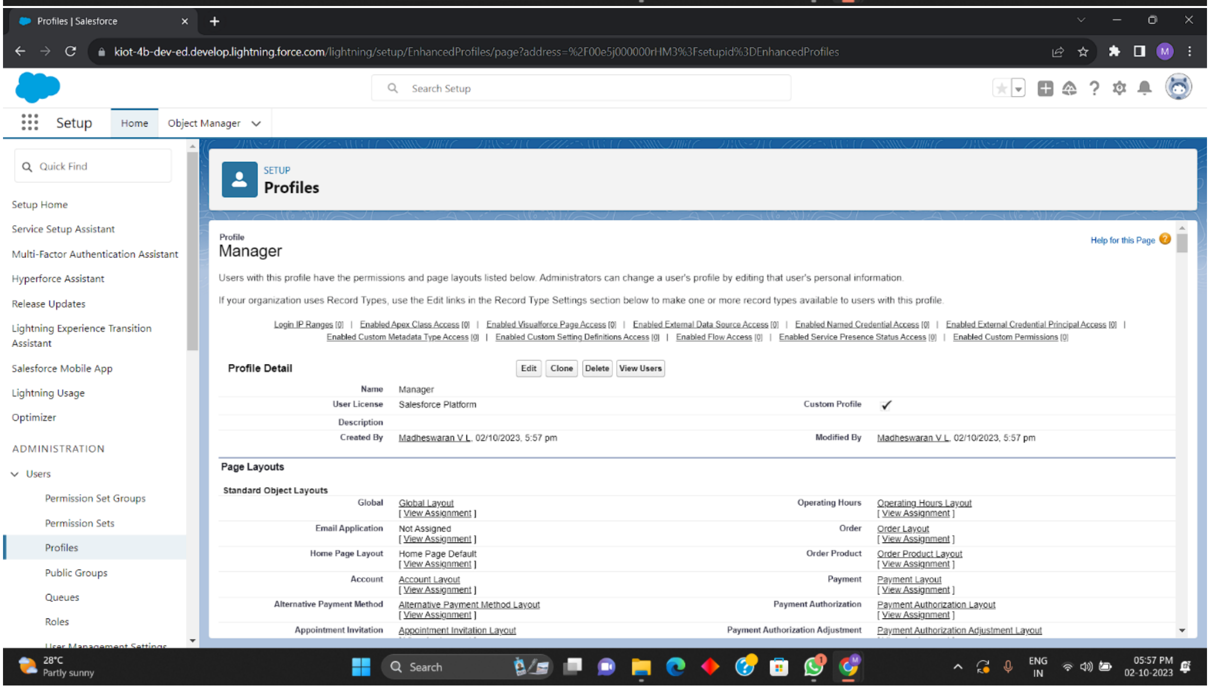


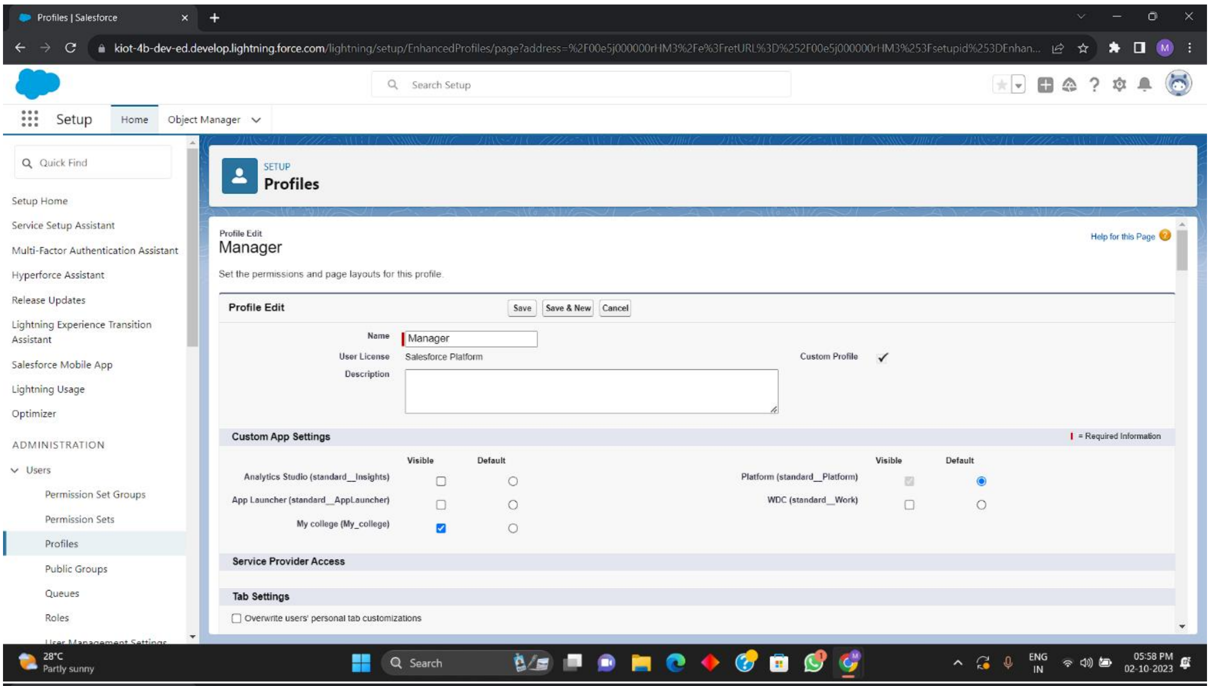
Profiles | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
SETUP
Profiles
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
Action
Profile Name
User License
Custom
Edit | Clone
Salesforce API Only System Integrations
Salesforce Integration
Edit | Clone
Silver Partner User
Silver Partner
Edit | Clone
Solution Manager
Salesforce
Edit | Clone
Standard Platform User
Salesforce Platform
Edit | Clone
Standard User
Salesforce
Edit | Clone
System Administrator
Salesforce
1-6 of 6
0 Selected
Previous Next
Page 1 of 1
28°C
Partly sunny
Search
ENG
IN
05:56 PM
02-10-2023



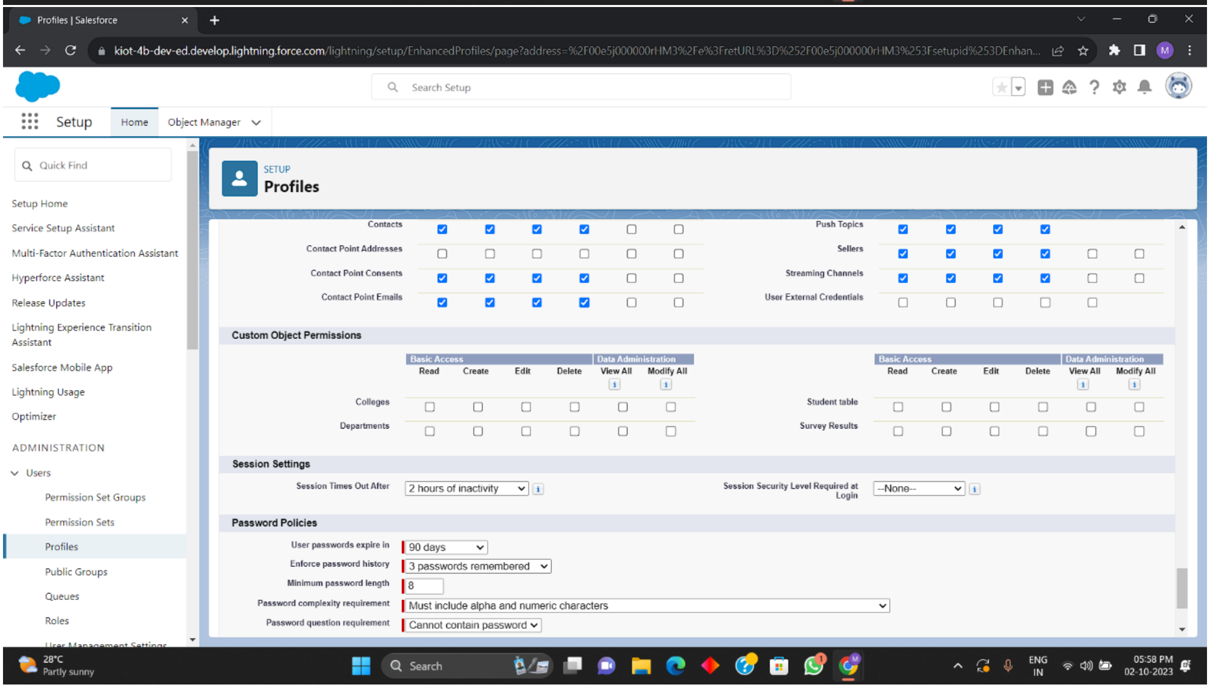
Profiles | Salesforce
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Standard Platform User
User License
Salesforce Platform
Profile Name
Save
Cancel
28°C
Partly sunny
Search
ENG
IN
05:56 PM
02-10-2023


Profiles | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3Fid%3D00e5j000004foO2%26setupid...
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Standard Platform User
User License
Salesforce Platform
Profile Name
Manager
Save
Cancel
28°C
Partly sunny
Search
ENG
IN
05:57 PM
02-10-2023

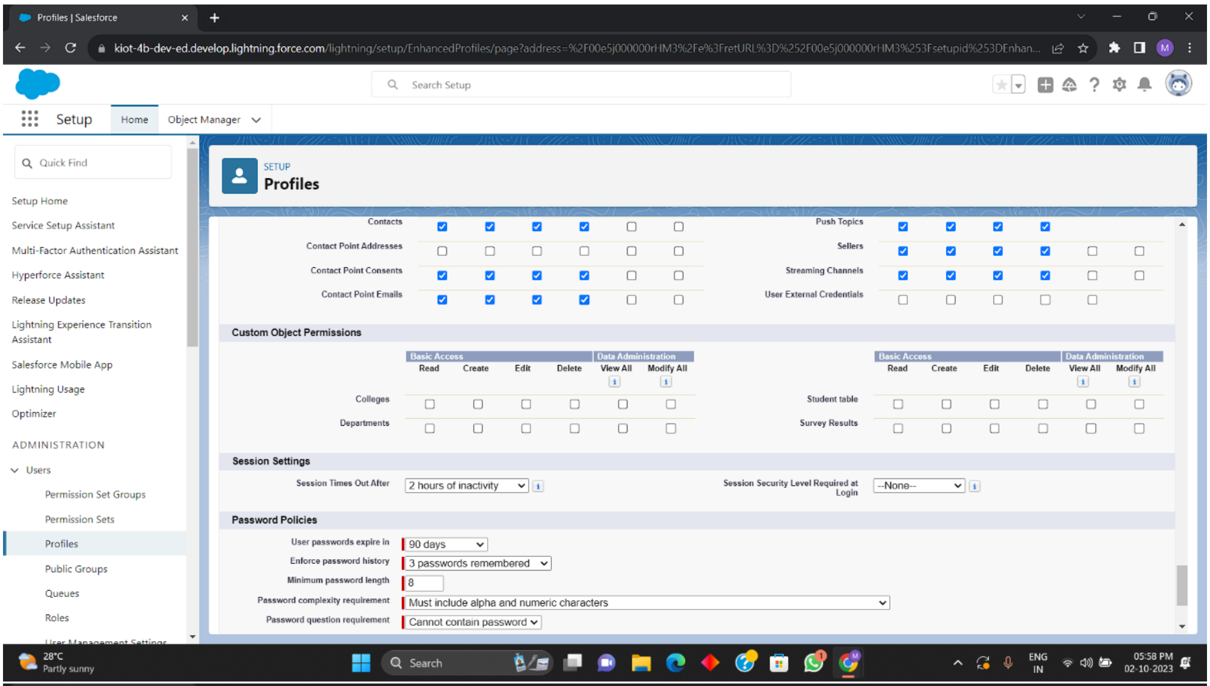

Profiles | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000rHM3%3Fsetupid%3DEnhancedProfiles
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
SETUP
Profiles
Profile
Manager
Help for this Page
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
Edit
Clone
Delete
View Users
Name
Manager
User License
Salesforce Platform
Custom Profile
Description
Created By
Madheswaran V L, 02/10/2023, 5:57 pm
Modified By
Madheswaran V L, 02/10/2023, 5:57 pm
Page Layouts
Standard Object Layouts
Global
Global Layout
[View Assignment]
Operating Hours
Operating Hours Layout
Email Application
Not Assigned
Order
Order Layout
Home Page Layout
Home Page Default
Order Product
Order Product Layout
Account
Account Layout
Payment
Payment Layout
Alternative Payment Method
Alternative Payment Method Layout
Payment Authorization
Payment Authorization Layout
Appointment Invitation
Appointment Invitation Layout
Payment Authorization Adjustment
Payment Authorization Adjustment Layout
28°C
Partly sunny
Search
ENG
IN
05:57 PM
02-10-2023

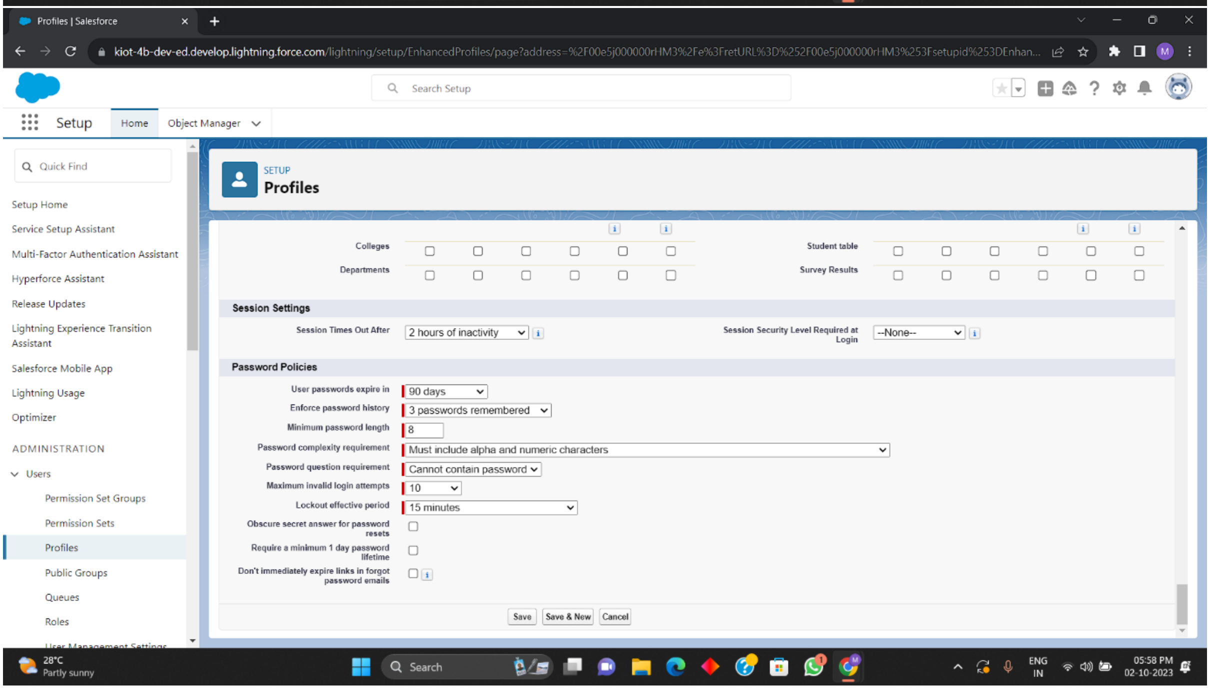


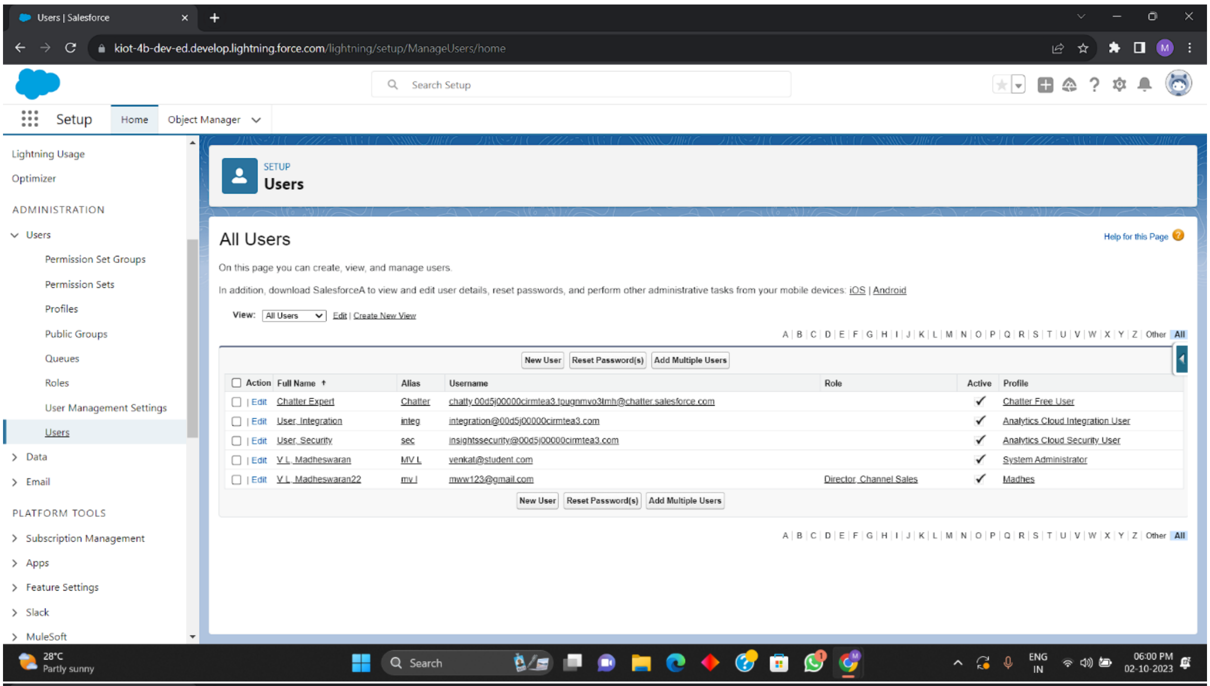
Profiles | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000rHM3%2Fe%3FretURL%3D%252F00e5j000000rHM3%253Fsetupid%253DEnhan...
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
SETUP
Profiles
Profile Edit
Manager
Help for this Page
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
Manager
User License
Salesforce Platform
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
My college (My_college)
Platform (standard__Platform)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
28°C
Partly sunny
Search
ENG
IN
05:58 PM
02-10-2023

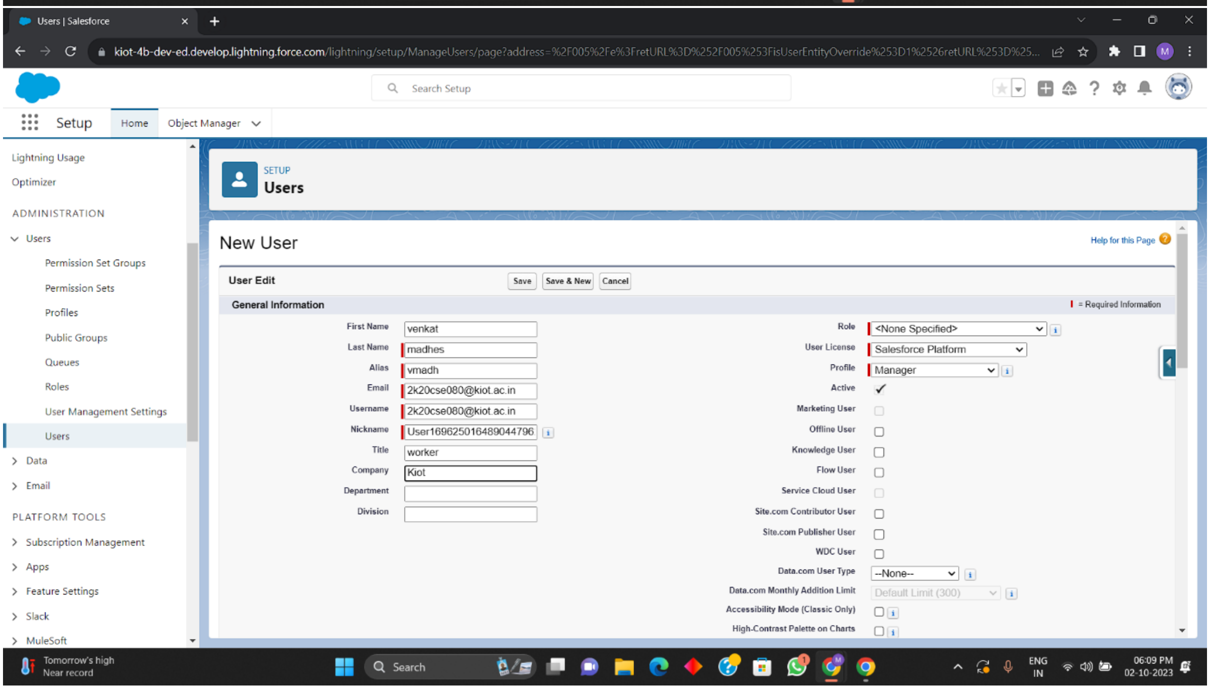


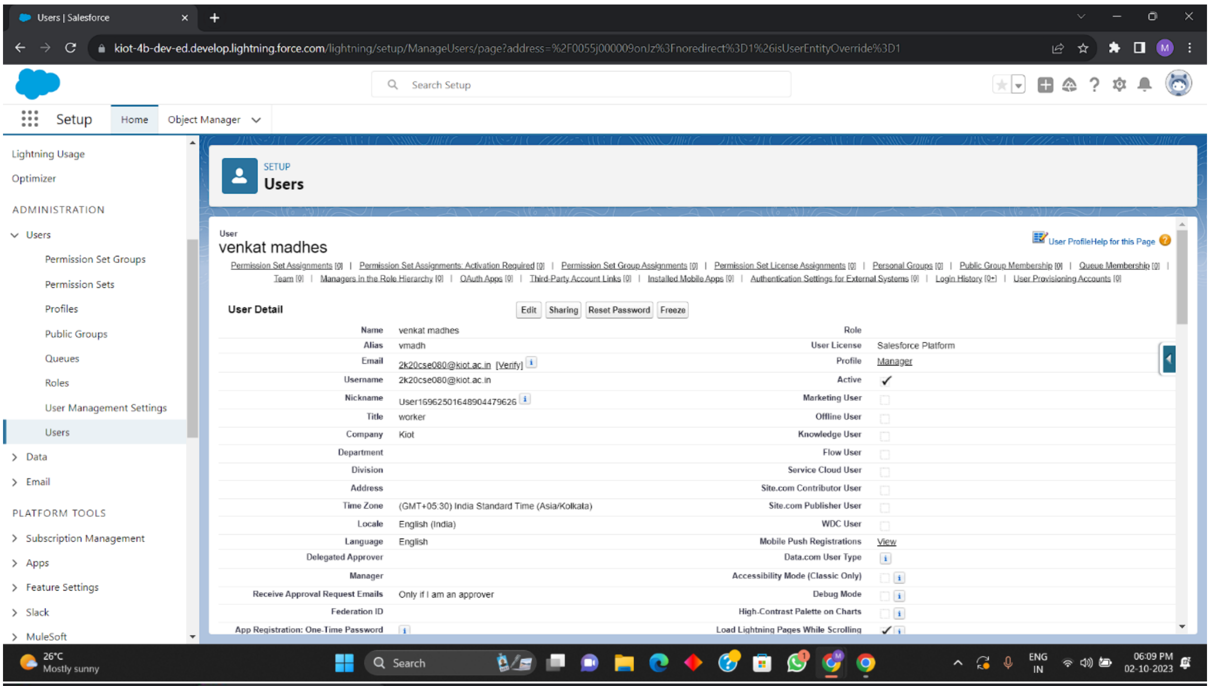
Profiles | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000rHM3%2Fe%3FretURL%3D%252F00e5j000000rHM3%253Fsetupid%253DEnhan...
Search Setup
Setup
Home
Object Manager
Quick Find
SETUP
Profiles
Contacts
Contact Point Addresses
Contact Point Consents
Contact Point Emails
Push Topics
Sellers
Streaming Channels
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Colleges
Departments
Student table
Survey Results
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
28°C
Partly sunny
Search
ENG
IN
05:58 PM
02-10-2023


Profiles | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000rHM3%2Fe%3FretURL%3D%252F00e5j000000rHM3%253Fsetupid%253DEnhan...
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
SETUP
Profiles
Contacts
Contact Point Addresses
Contact Point Consents
Contact Point Emails
Push Topics
Sellers
Streaming Channels
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Colleges
Departments
Student table
Survey Results
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
28°C
Partly sunny
Search
ENG
IN
05:58 PM
02-10-2023

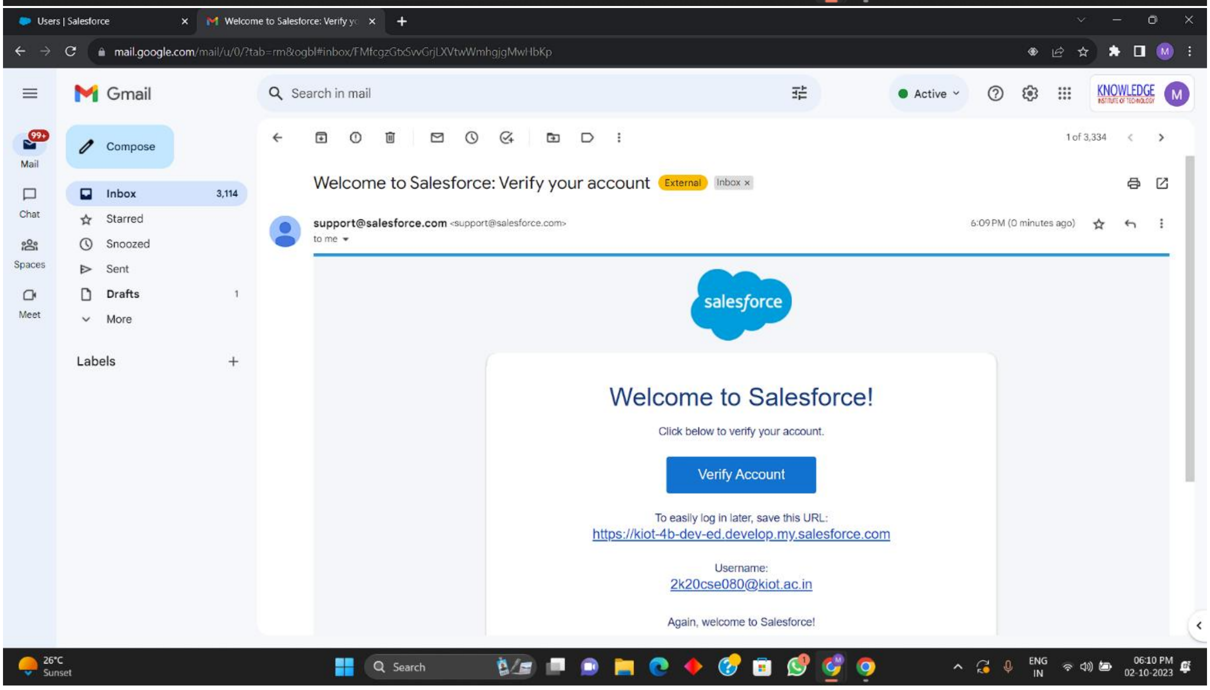

Profiles | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000rHM3%2Fe%3FretURL%3D%252F00e5j000000rHM3%253Fsetupid%253DEnhan...
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
SETUP
Profiles
Colleges
Departments
Student table
Survey Results
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
Save
Save & New
Cancel
28°C
Partly sunny
Search
ENG
IN
05:58 PM
02-10-2023


Users | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
Search Setup
Setup
Home
Object Manager
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
SETUP
Users
All Users
Help for this Page
On this page you can create, view, and manage users.
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android
View: All Users Edit | Create New View
New User
Reset Password(s)
Add Multiple Users
Action Full Name Alias Username Role Active Profile
Edit Chatter Expert Chatter Chatter Free User
Edit User, Integration integ integration@00d5j00000cirmtea3.com Analytics Cloud Integration User
Edit User, Security sec Analytics Cloud Security User
Edit V.L, Madheswaran MV.L venkat@student.com System Administrator
Edit V.L, Madheswaran22 mv.l mww123@gmail.com Director, Channel Sales Madhes
28°C
Partly sunny
Search
ENG
IN
06:00 PM
02-10-2023

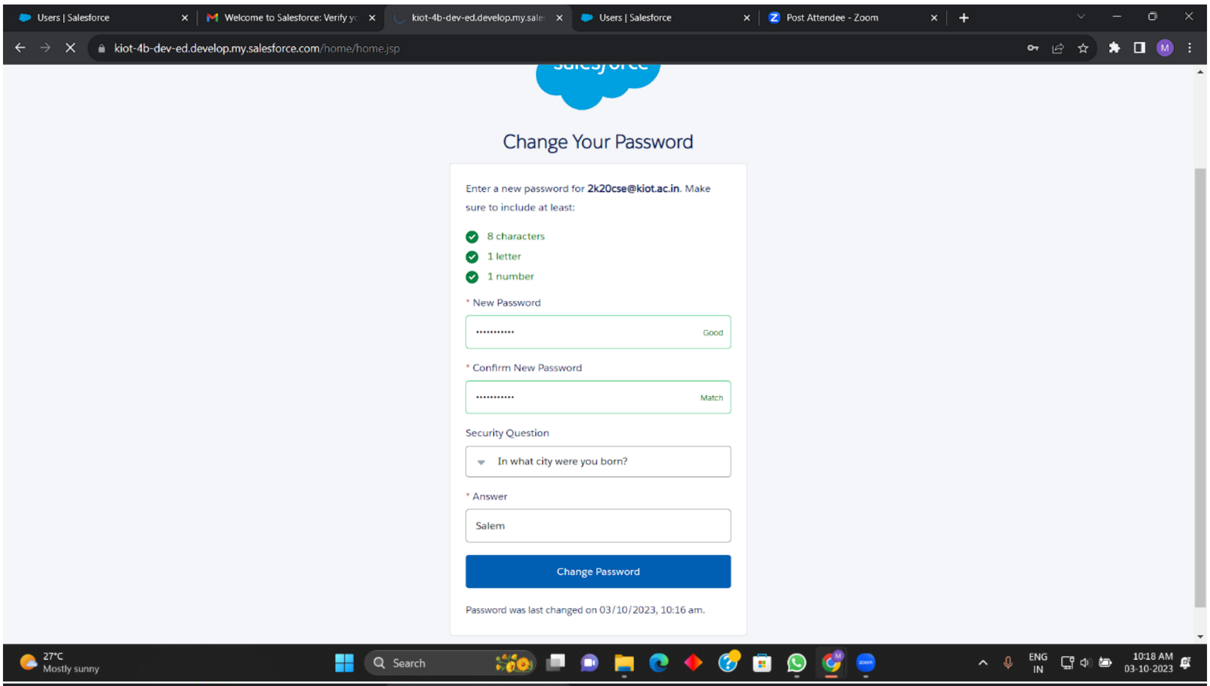
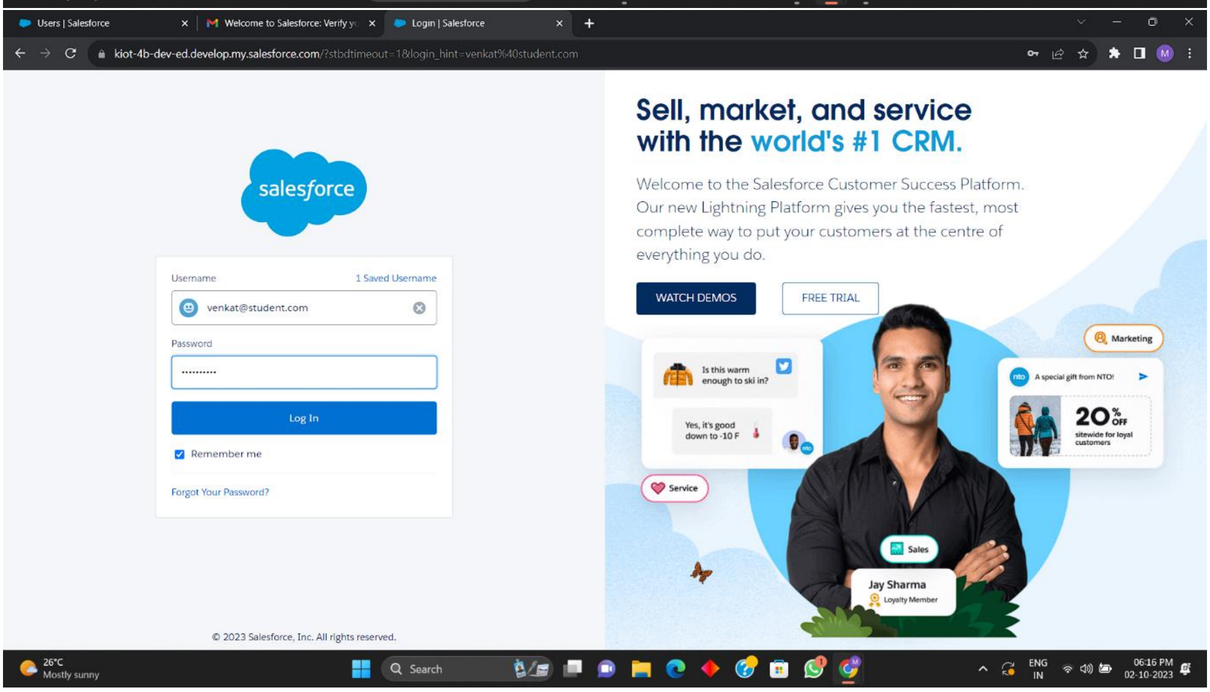

Users | Salesforce
Search Setup
Setup
Home
Object Manager
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name venkat
Last Name madhes
Alias vmadh
Email 2k20cse080@kiot.ac.in
Username 2k20cse080@kiot.ac.in
Nickname User16962501648904479
Title worker
Company Kiot
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
Tomorrow's high
Near record
Search
ENG
IN
06:09 PM
02-10-2023

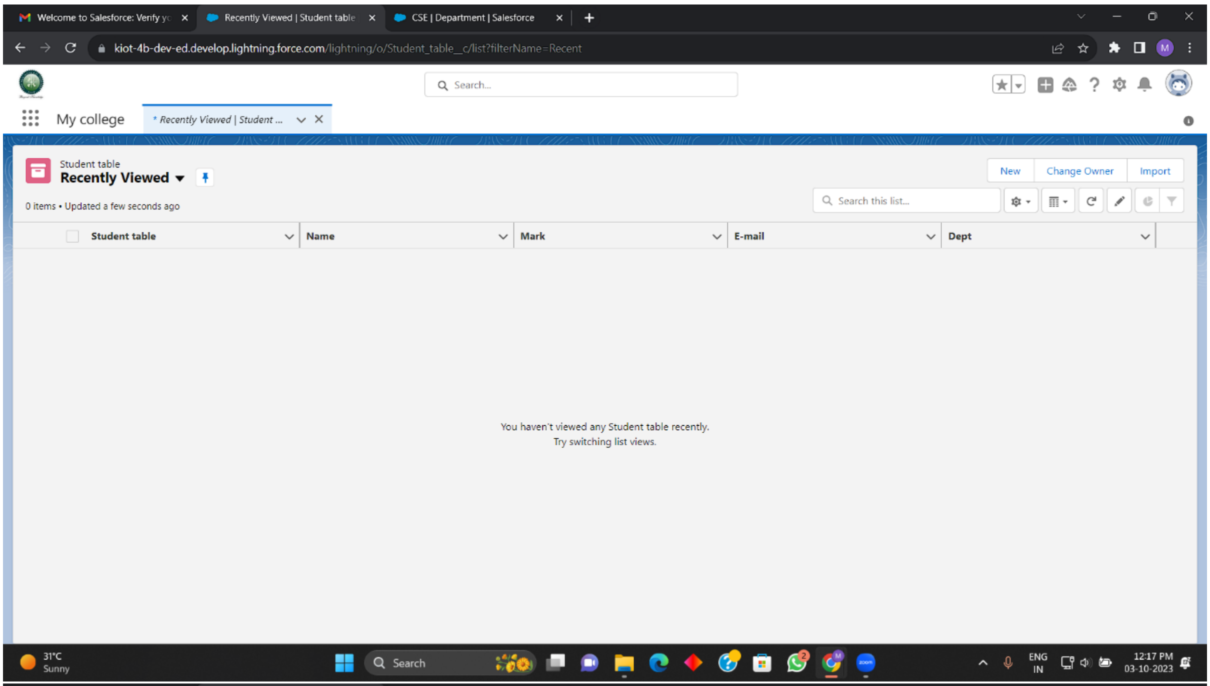


Users | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j000009onJz%3Fnoredirect%3D1%26isUserEntityOverride%3D1
Search Setup
Setup
Home
Object Manager
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
SETUP
Users
User
venkat madhes
User Profile Help for this Page
User Detail
Edit
Sharing
Reset Password
Freeze
Name venkat madhes
Alias vmadh
Email 2k20cse080@kiot.ac.in [Verify]
Username 2k20cse080@kiot.ac.in
Nickname User16962501648904479626
Title worker
Company Kiot
Department
Division
Address
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Delegated Approver
Manager
Receive Approval Request Emails Only if I am an approver
Federation ID
App Registration: One-Time Password
Role
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
Mobile Push Registrations View
Data.com User Type
Accessibility Mode (Classic Only)
Debug Mode
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
26°C
Mostly sunny
Search
ENG
IN
06:09 PM
02-10-2023

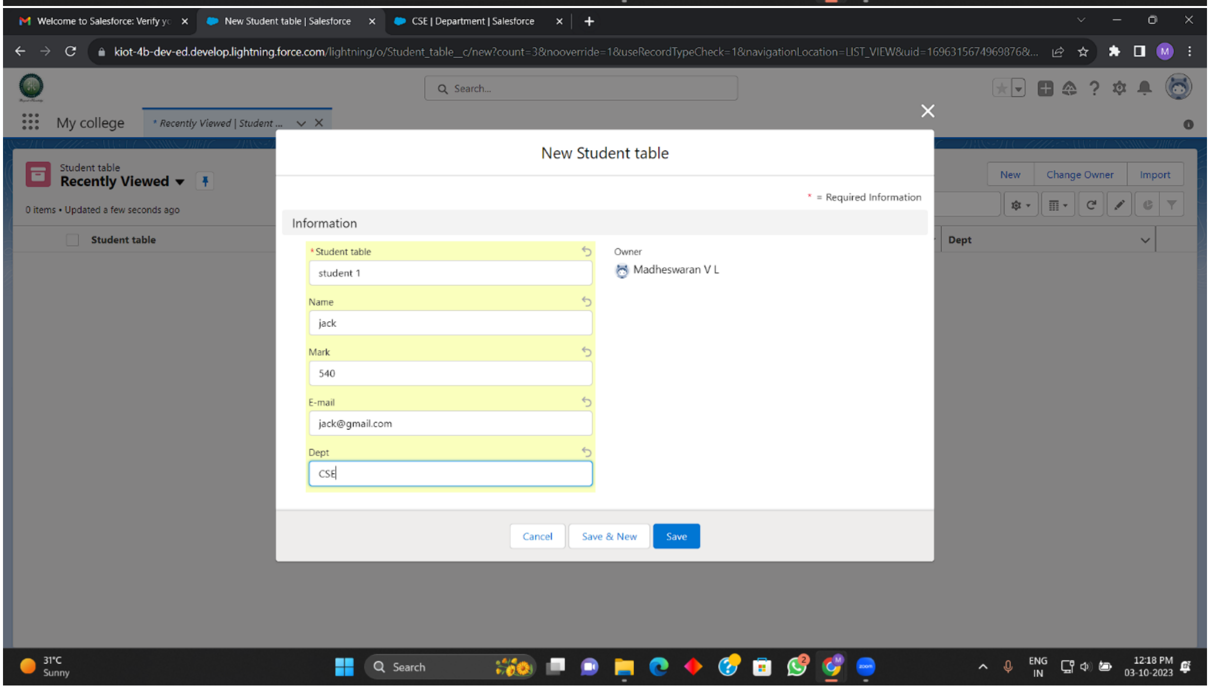


Users | Salesforce
Welcome to Salesforce: Verify y
mail.google.com/mail/u/0/?tab=rm&ogbl#inbox/FMfcgzGtxSvvGrjLXVtwWmhgjgMwHbKp
Gmail
Search in mail
Active
Compose
Mail
Chat
Spaces
Meet
Inbox 3,114
Starred
Snoozed
Sent
Drafts 1
More
Labels
1 of 3,334
Welcome to Salesforce: Verify your account
External
Inbox
support@salesforce.com <support@salesforce.com>
to me
6:09 PM (0 minutes ago)
salesforce
Welcome to Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://kiot-4b-dev-ed.develop.my.salesforce.com
Username:
2k20cse080@kiot.ac.in
Again, welcome to Salesforce!
26°C
Sunset
Search
ENG
IN
06:10 PM
02-10-2023

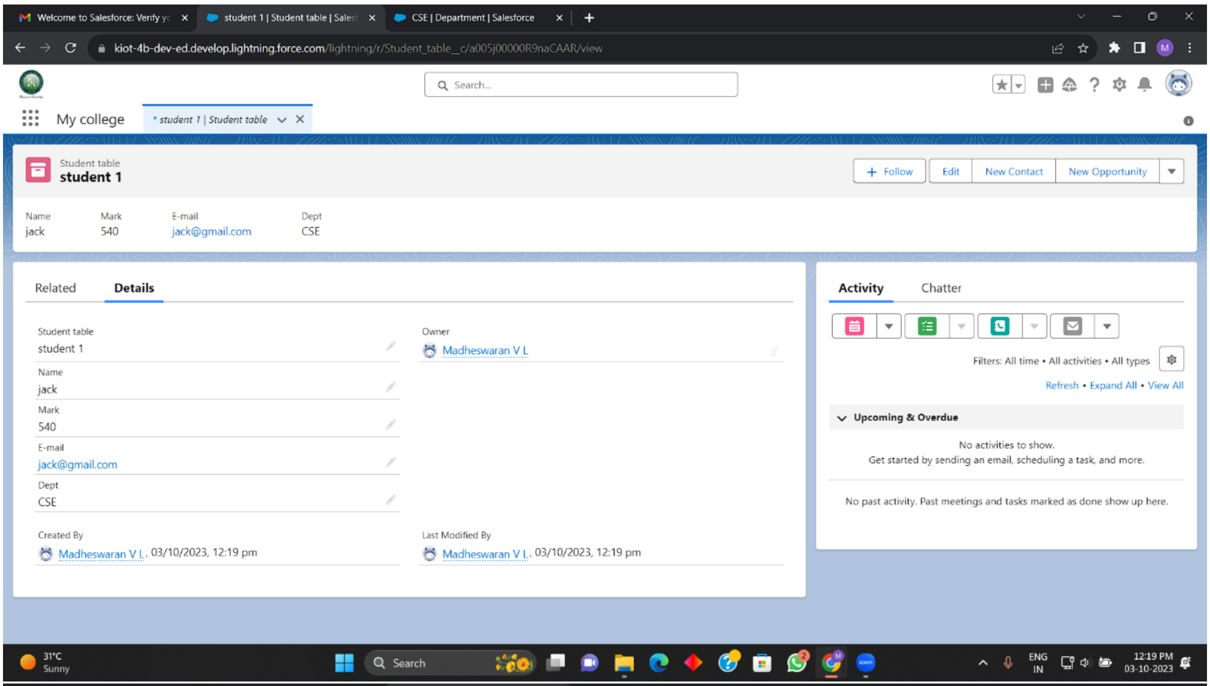

Users | Salesforce
Welcome to Salesforce: Verify y
kiot-4b-dev-ed.develop.my.sale
Users | Salesforce
Post Attendee - Zoom
kiot-4b-dev-ed.develop.my.salesforce.com/home/home.jsp
Change Your Password
Enter a new password for 2k20cse@kiot.ac.in. Make sure to include at least:
8 characters
1 letter
1 number
* New Password
Good
* Confirm New Password
Match
Security Question
In what city were you born?
* Answer
Salem
Change Password
Password was last changed on 03/10/2023, 10:16 am.
27°C
Mostly sunny
Search
ENG
IN
10:18 AM
03-10-2023

Users | Salesforce
Welcome to Salesforce: Verify y
Login | Salesforce
kiot-4b-dev-ed.develop.my.salesforce.com/?stbdtimeout=1&login_hint=venkat%40student.com
salesforce
Username
1 Saved Username
venkat@student.com
Password
Log In
Remember me
Forgot Your Password?
© 2023 Salesforce, Inc. All rights reserved.
Sell, market, and service with the world's #1 CRM.
Welcome to the Salesforce Customer Success Platform. Our new Lightning Platform gives you the fastest, most complete way to put your customers at the centre of everything you do.
WATCH DEMOS
FREE TRIAL
Is this warm enough to ski in?
Yes, it's good down to -10 F
Marketing
A special gift from NTO!
20% OFF
sitewide for loyal customers
Service
Sales
Jay Sharma
Loyalty Member
26°C
Mostly sunny
Search
ENG
IN
06:16 PM
02-10-2023

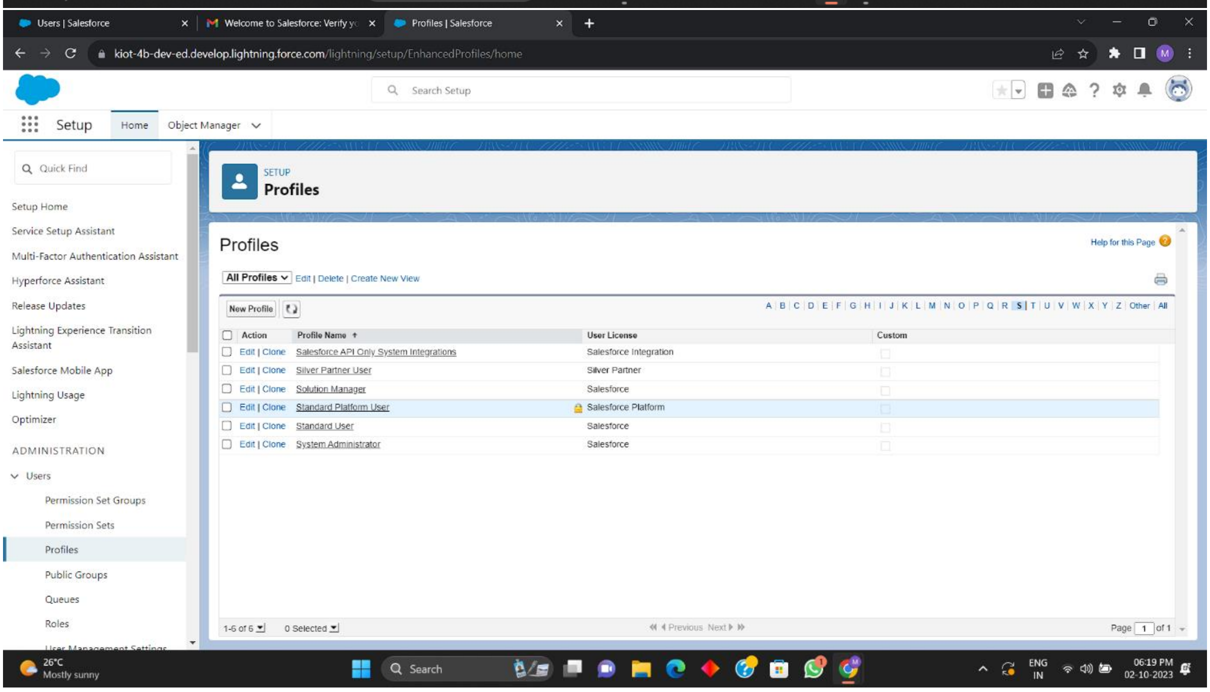


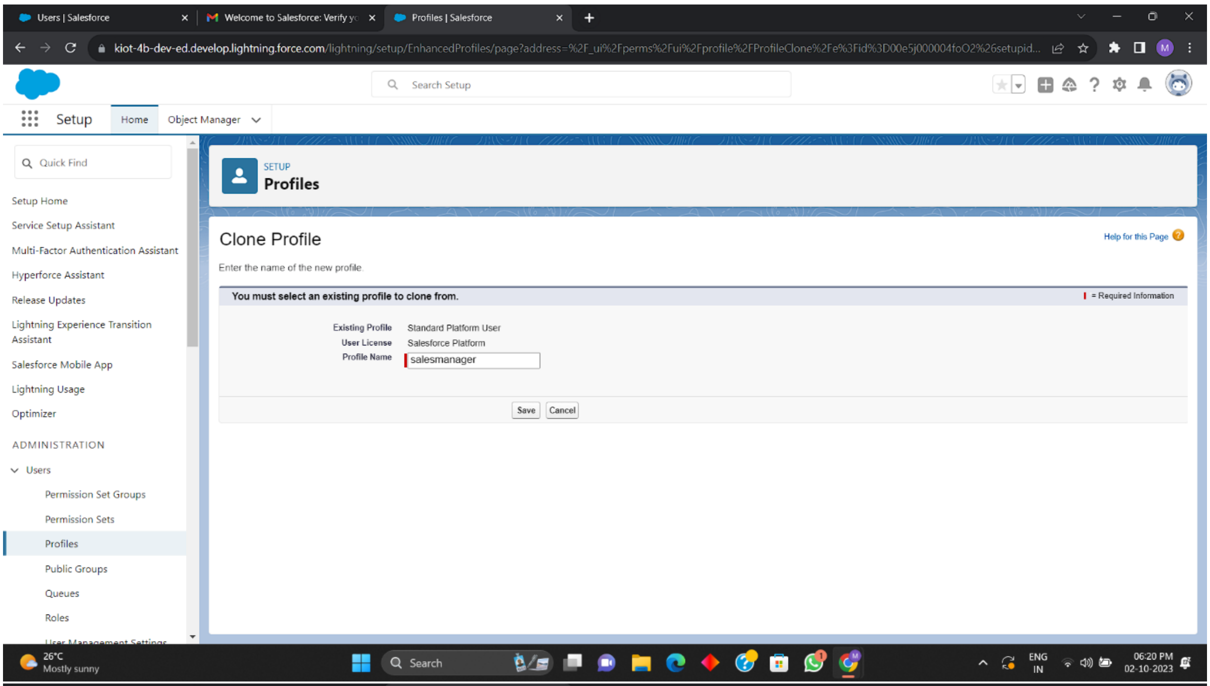
My college
Student table
Recently Viewed
0 items • Updated a few seconds ago
New
Change Owner
Import
Student table
Name
Mark
E-mail
Dept
You haven't viewed any Student table recently.
Try switching list views.

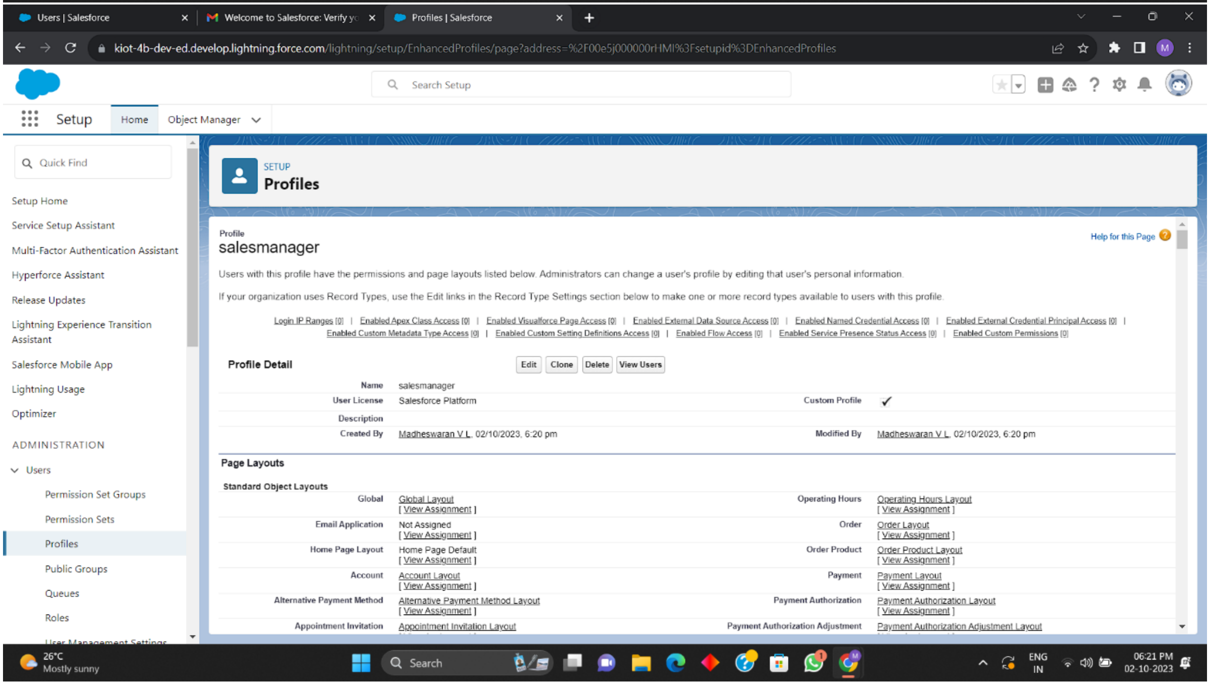


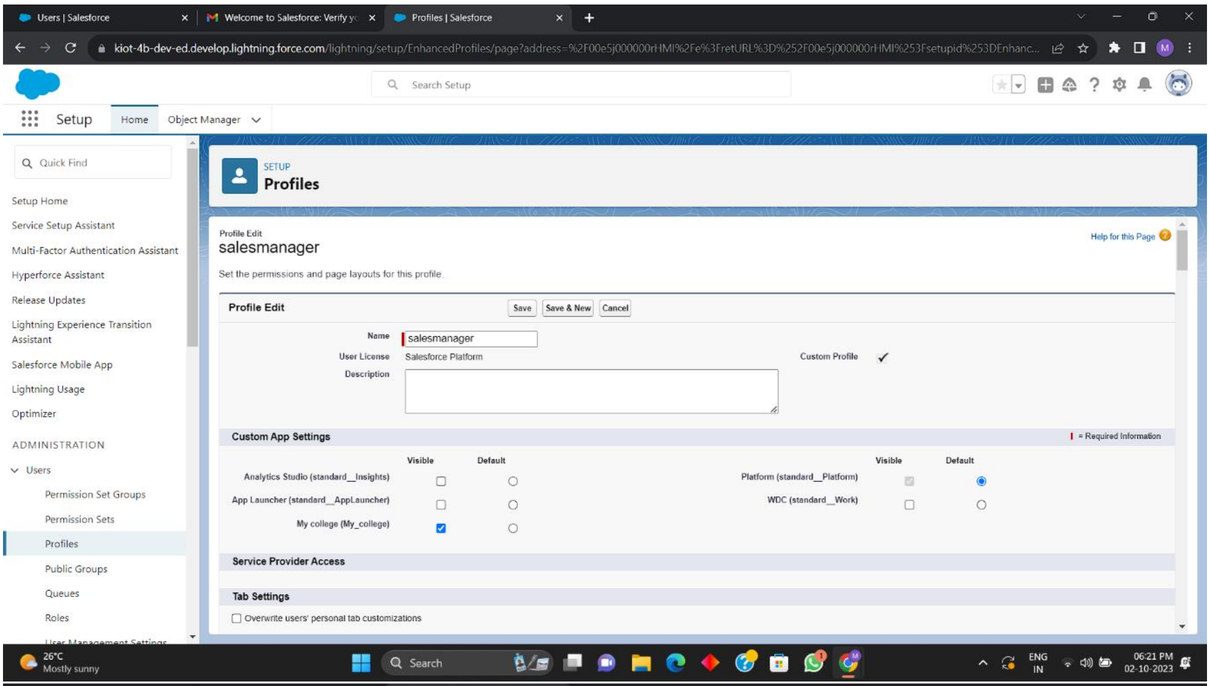
New Student table
* = Required Information
Information
* Student table
student 1
Name
jack
Mark
540
E-mail
jack@gmail.com
Dept
CSE
Owner
Madheswaran V L
Cancel
Save & New
Save

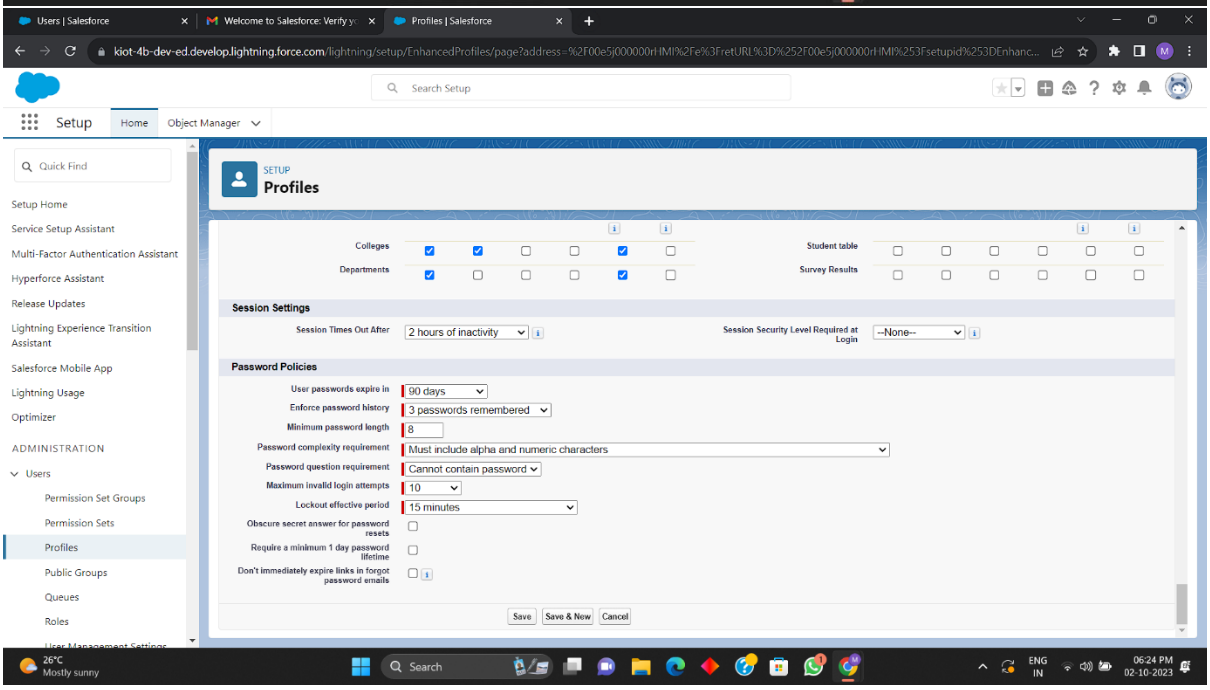

Welcome to Salesforce: Verify yo
student 1 | Student table | Sales
CSE | Department | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/r/Student_table__c/a005j00000R9naCAAR/view
Search...
My college
* student 1 | Student table
Student table
student 1
Follow
Edit
New Contact
New Opportunity
Name
jack
Mark
540
E-mail
jack@gmail.com
Dept
CSE
Related
Details
Student table
student 1
Owner
Madheswaran V L
Name
jack
Mark
540
E-mail
jack@gmail.com
Dept
CSE
Created By
Madheswaran V L, 03/10/2023, 12:19 pm
Last Modified By
Madheswaran V L, 03/10/2023, 12:19 pm
Activity
Chatter
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a task, and more.
No past activity. Past meetings and tasks marked as done show up here.
31°C
Sunny
Search
ENG
IN
12:19 PM
03-10-2023

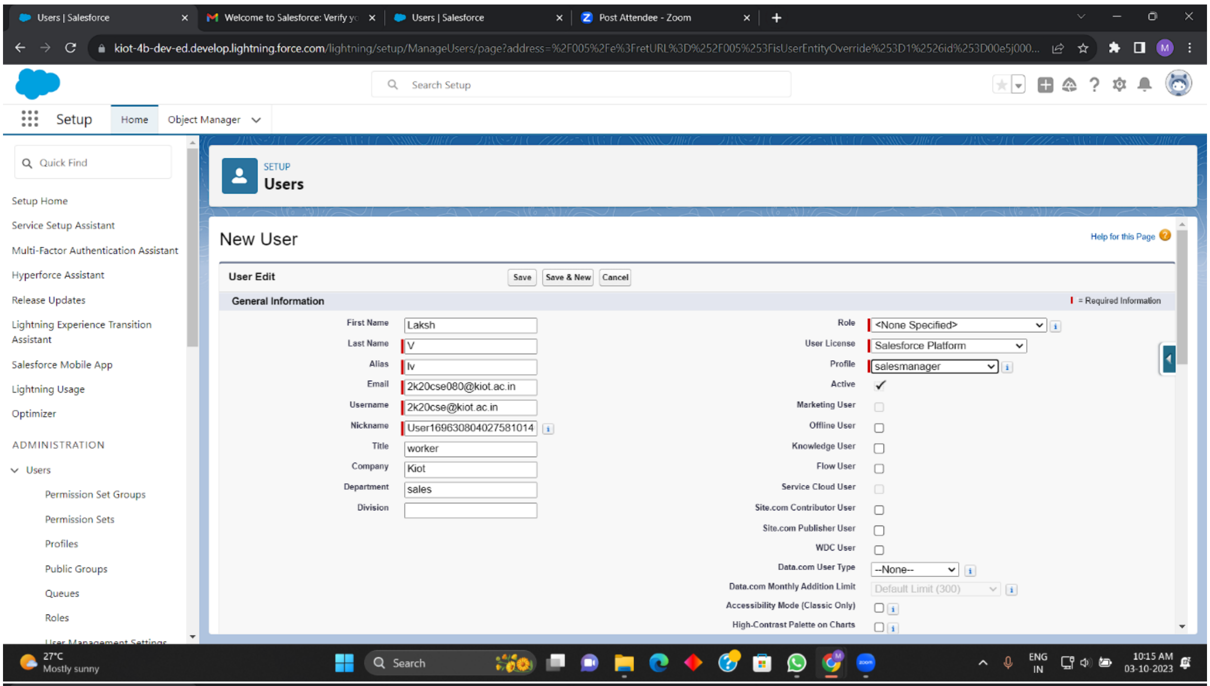

Users | Salesforce
Welcome to Salesforce: Verify yo
Profiles | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
SETUP
Profiles
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
Action
Profile Name
User License
Custom
Edit | Clone
Salesforce API Only System Integrations
Salesforce Integration
Edit | Clone
Silver Partner User
Silver Partner
Edit | Clone
Solution Manager
Salesforce
Edit | Clone
Standard Platform User
Salesforce Platform
Edit | Clone
Standard User
Salesforce
Edit | Clone
System Administrator
Salesforce
1-6 of 6
0 Selected
Previous
Next
Page 1 of 1
26°C
Mostly sunny
Search
ENG
IN
06:19 PM
02-10-2023


Users | Salesforce
Welcome to Salesforce: Verify y
Profiles | Salesforce
Setup
Home
Object Manager
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Standard Platform User
User License
Salesforce Platform
Profile Name
salesmanager
Save
Cancel
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

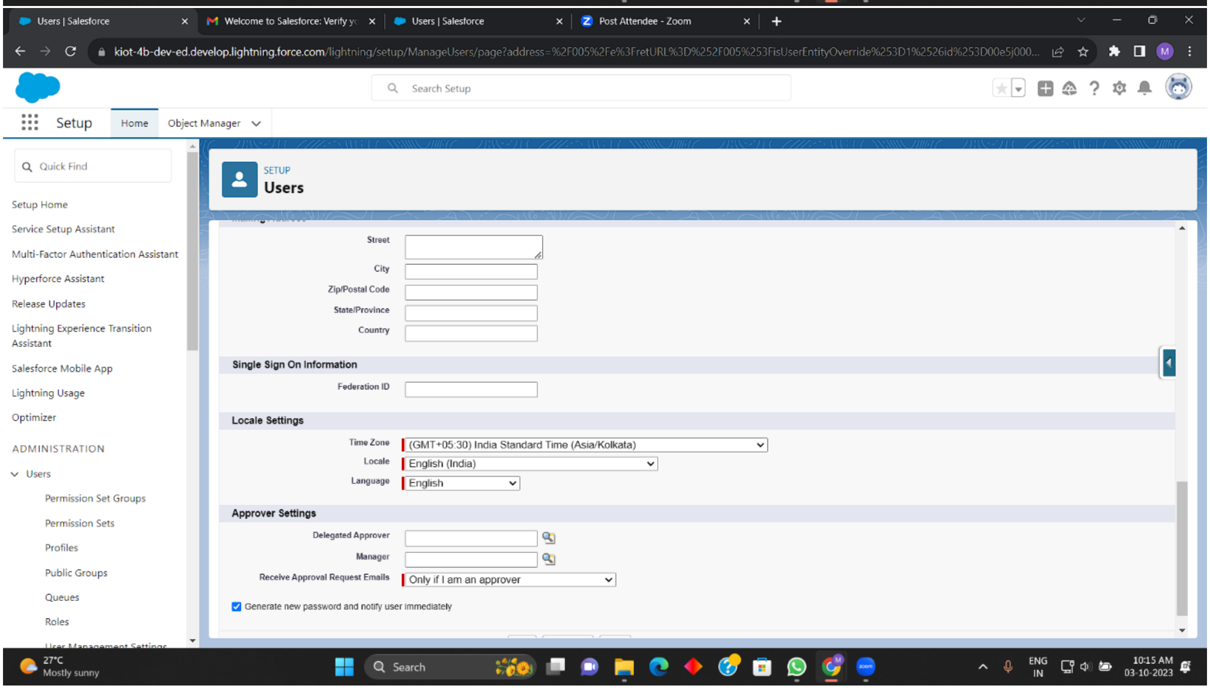

Profiles | Salesforce
SETUP
Profiles
Profile
salesmanager
Help for this Page
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Profile Detail
Edit
Clone
Delete
View Users
Name
salesmanager
User License
Salesforce Platform
Custom Profile
Description
Created By
Madheswaran V L, 02/10/2023, 6:20 pm
Modified By
Madheswaran V L, 02/10/2023, 6:20 pm
Page Layouts
Standard Object Layouts
Global
Global Layout
Operating Hours
Operating Hours Layout
Email Application
Not Assigned
Order
Order Layout
Home Page Layout
Home Page Default
Order Product
Order Product Layout
Account
Account Layout
Payment
Payment Layout
Alternative Payment Method
Alternative Payment Method Layout
Payment Authorization
Payment Authorization Layout
Appointment Invitation
Appointment Invitation Layout
Payment Authorization Adjustment
Payment Authorization Adjustment Layout


Profiles | Salesforce
Setup
Profiles
Profile Edit
salesmanager
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
salesmanager
User License
Salesforce Platform
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
My college (My_college)
Platform (standard__Platform)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations

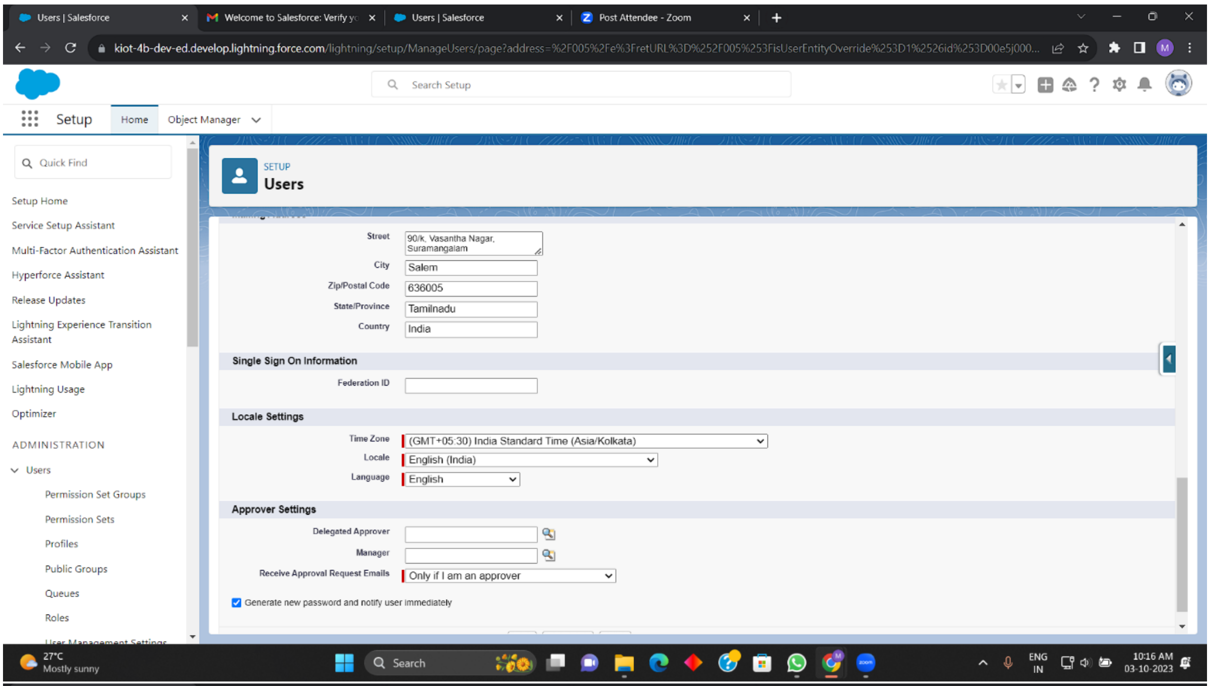

Profiles | Salesforce
Setup
Profiles
Colleges
Departments
Student table
Survey Results
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum 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
Save
Save & New
Cancel

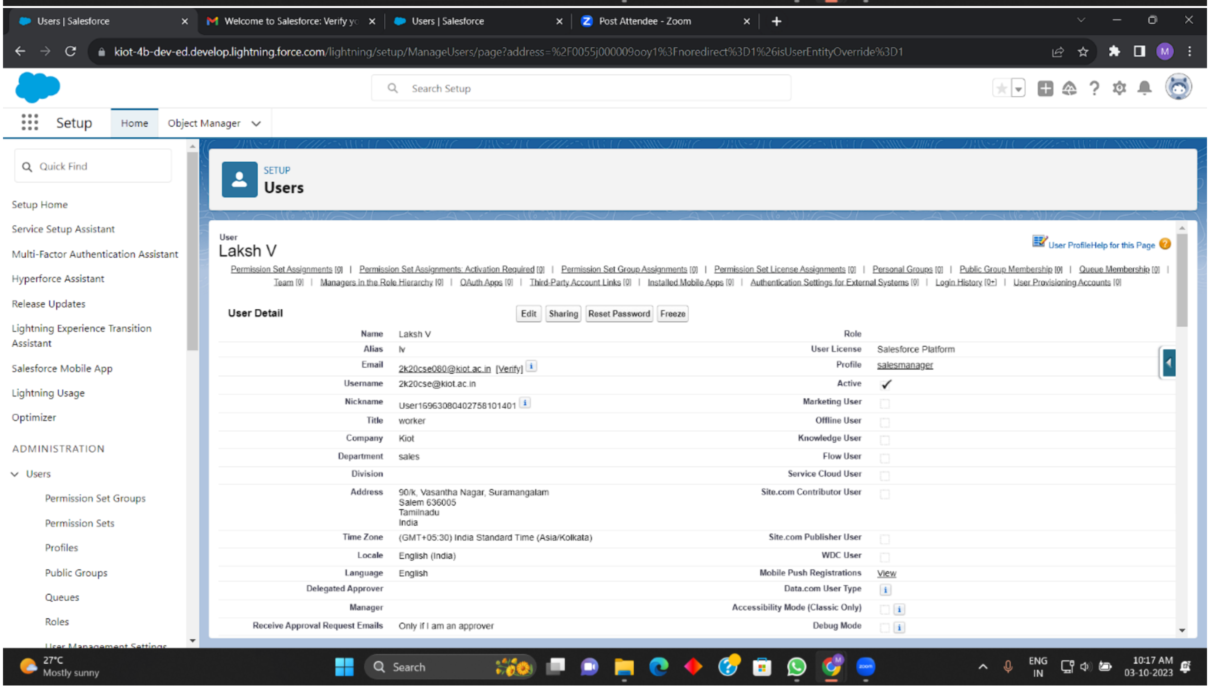


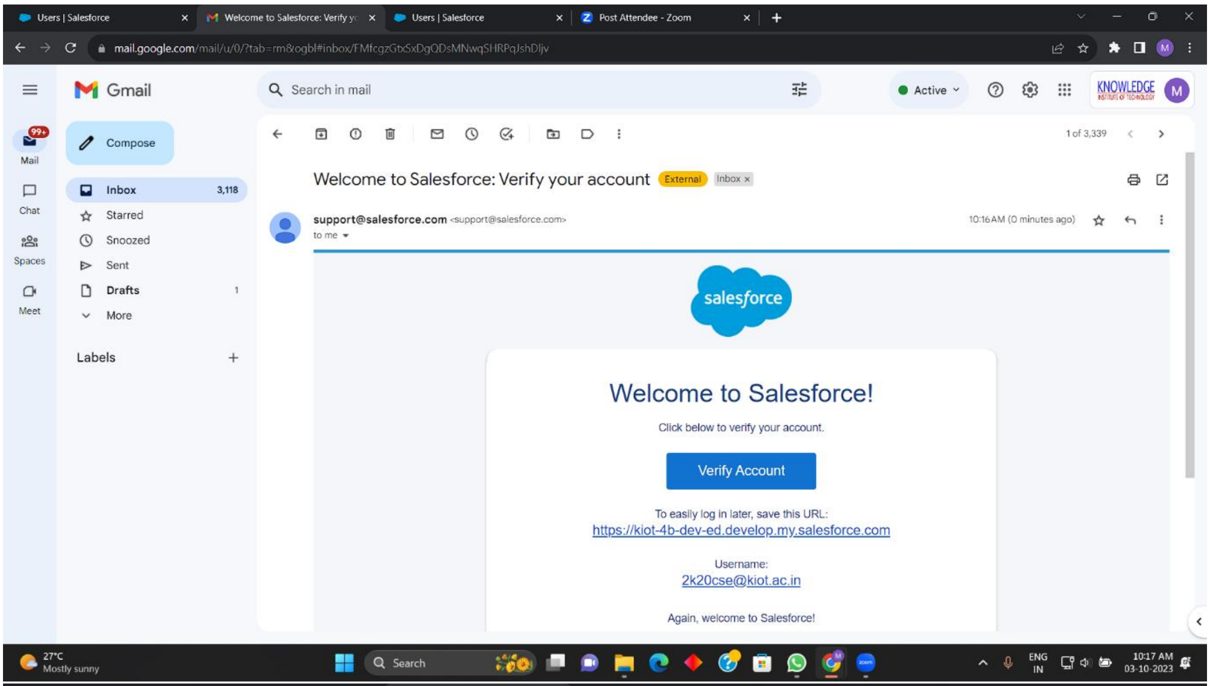
Setup
Users
New User
User Edit
Save
Save & New
Cancel
General Information
First Name Laksh
Last Name V
Alias lv
Email 2k20cse080@kiot.ac.in
Username 2k20cse@kiot.ac.in
Nickname User16963080402758101
Title worker
Company Kiot
Department sales
Division
Role <None Specified>
User License Salesforce Platform
Profile salesmanager
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

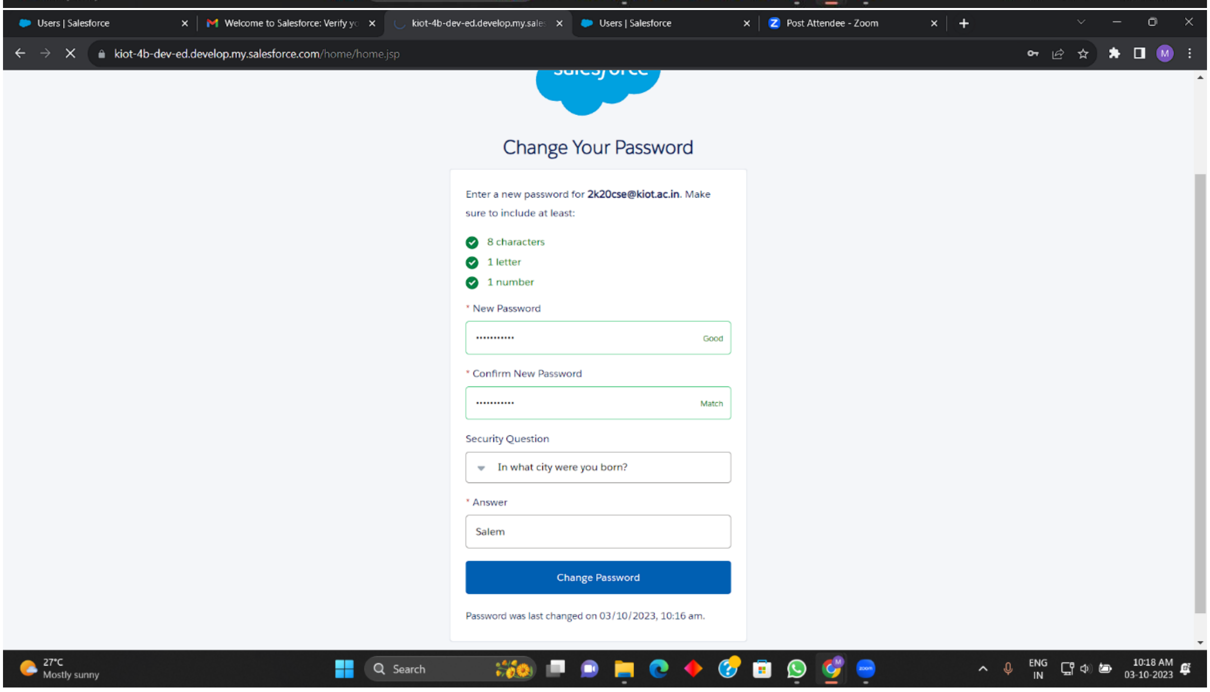


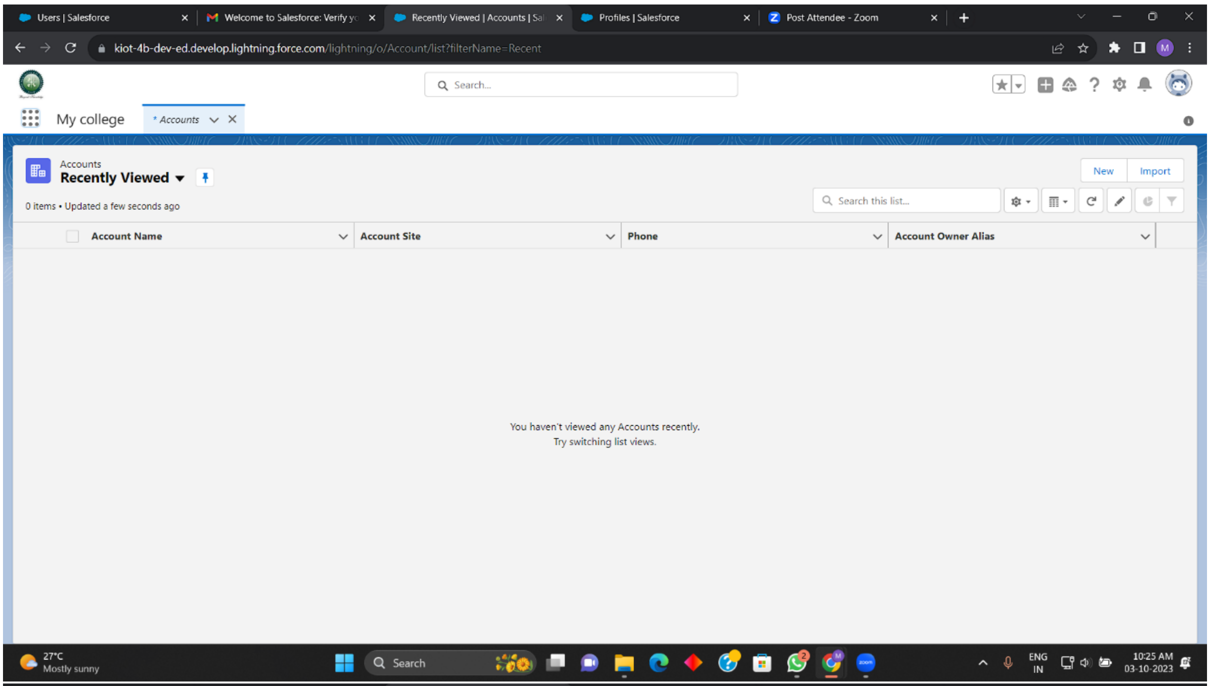
Setup
Users
Street
City
Zip/Postal Code
State/Province
Country
Single Sign On Information
Federation ID
Locale Settings
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Approver Settings
Delegated Approver
Manager
Receive Approval Request Emails Only if I am an approver
Generate new password and notify user immediately

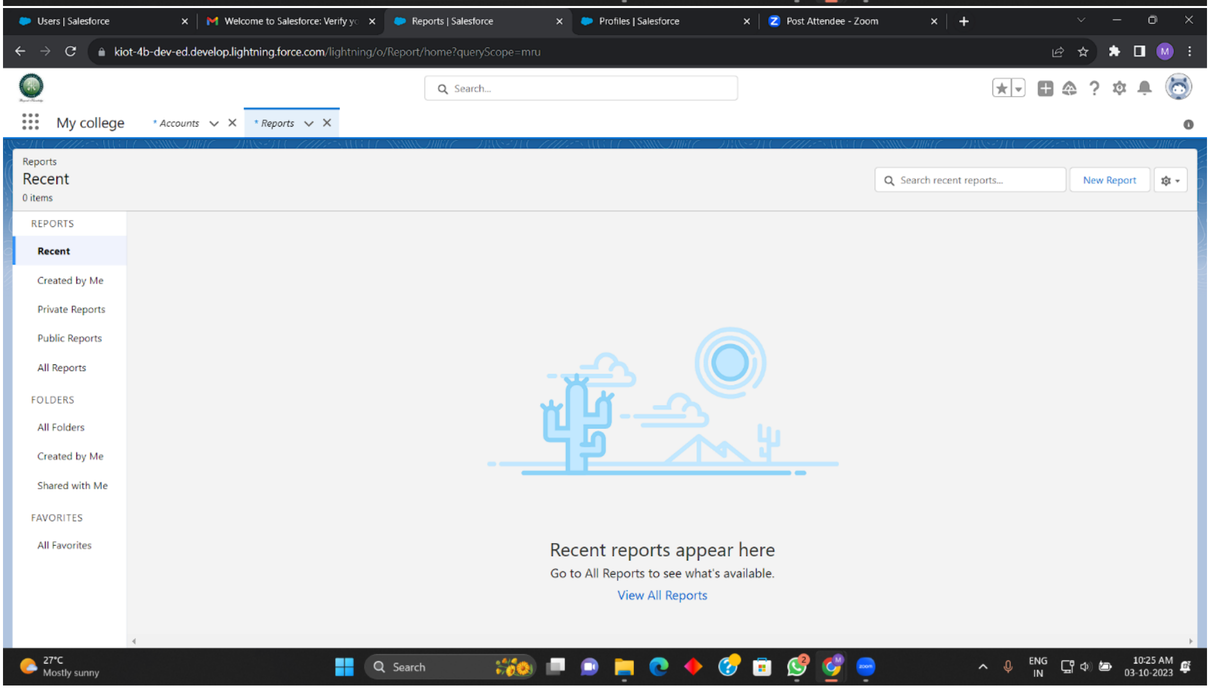

Setup
Users
Street 90/k, Vasantha Nagar, Suramangalam
City Salem
Zip/Postal Code 636005
State/Province Tamilnadu
Country India
Single Sign On Information
Federation ID
Locale Settings
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Approver Settings
Delegated Approver
Manager
Receive Approval Request Emails Only if I am an approver
Generate new password and notify user immediately

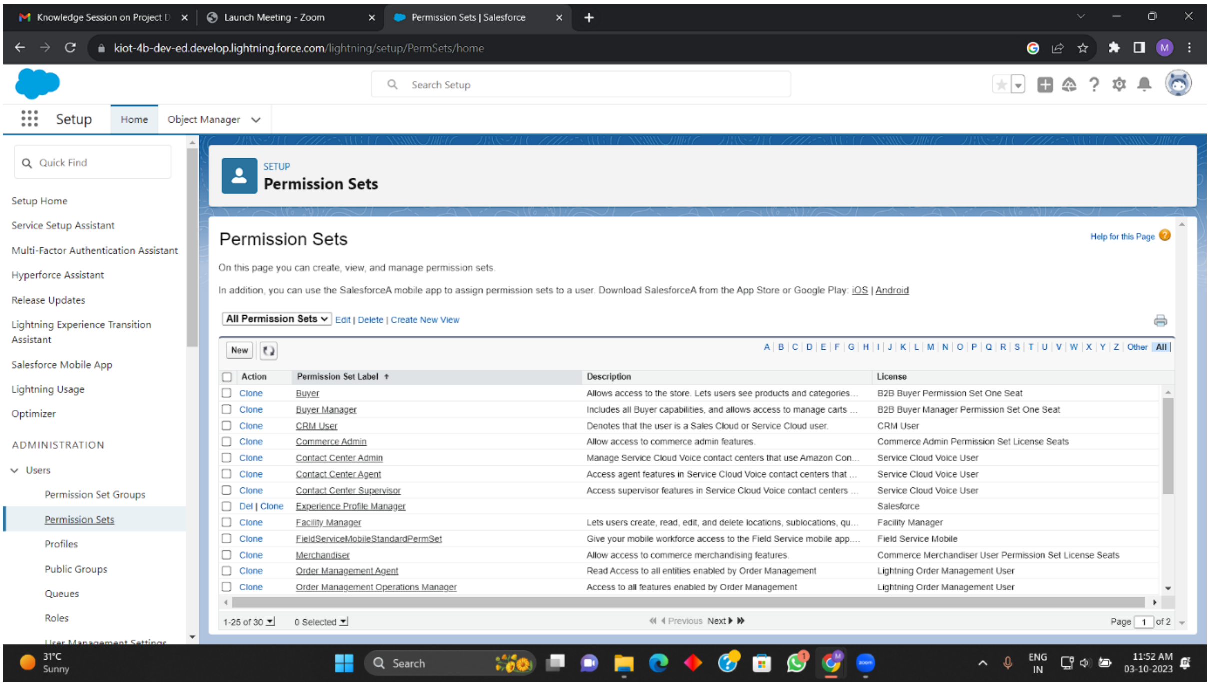

Setup
Users
User
Laksh V
User Detail
Edit Sharing Reset Password Freeze
Name Laksh V
Alias lv
Email 2k20cse080@kiot.ac.in [Verify]
Username 2k20cse@kiot.ac.in
Title worker
Company Kiot
Department sales
Address 90/k, Vasantha Nagar, Suramangalam
Salem 636005
Tamilnadu
India
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Receive Approval Request Emails Only if I am an approver
User License Salesforce Platform
Profile salesmanager
Active


Users | Salesforce
Welcome to Salesforce: Verify yo
Users | Salesforce
Post Attendee - Zoom
mail.google.com/mail/u/0/?tab=rm&ogbl#inbox/FMfcgzGtxSxDgQDsMNwqSHRPqJshDljv
Gmail
Search in mail
Active
Compose
Mail
Chat
Spaces
Meet
Inbox 3,118
Starred
Snoozed
Sent
Drafts 1
More
Labels
1 of 3,339
Welcome to Salesforce: Verify your account External Inbox
support@salesforce.com <support@salesforce.com>
to me
10:16 AM (0 minutes ago)
salesforce
Welcome to Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://kiot-4b-dev-ed.develop.my.salesforce.com
Username:
2k20cse@kiot.ac.in
Again, welcome to Salesforce!
27°C Mostly sunny
Search
ENG IN
10:17 AM 03-10-2023


Users | Salesforce
Welcome to Salesforce: Verify yo
kiot-4b-dev-ed.develop.my.sale
Users | Salesforce
Post Attendee - Zoom
kiot-4b-dev-ed.develop.my.salesforce.com/home/home.jsp
Change Your Password
Enter a new password for 2k20cse@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 03/10/2023, 10:16 am.
27°C Mostly sunny
Search
ENG IN
10:18 AM 03-10-2023


Users | Salesforce
Welcome to Salesforce: Verify y
Recently Viewed | Accounts | Sa
Profiles | Salesforce
Post Attendee - Zoom
kiot-4b-dev-ed.develop.lightning.force.com/lightning/o/Account/list?filterName=Recent
Search...
My college
* Accounts
Accounts
Recently Viewed
New
Import
0 items • Updated a few seconds ago
Search this list...
Account Name
Account Site
Phone
Account Owner Alias
You haven't viewed any Accounts recently.
Try switching list views.
27°C
Mostly sunny
Search
ENG
IN
10:25 AM
03-10-2023


Users | Salesforce
Welcome to Salesforce: Verify y
Reports | Salesforce
Profiles | Salesforce
Post Attendee - Zoom
kiot-4b-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
Search...
My college
* Accounts
* Reports
Reports
Recent
0 items
Search recent reports...
New Report
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Recent reports appear here
Go to All Reports to see what's available.
View All Reports
27°C
Mostly sunny
Search
ENG
IN
10:25 AM
03-10-2023



Step 2:

Permission Sets:

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

Object-Level Security:

• In each profile and permission set, set the object-level security for the Account object to

"Read" to ensure that both I-Jser A and I-Jser B can view Account records.

Record-Level Security:

• Implement record-level security using Criteria-Based Sharing Rules.

• Create a sharing rule that shares Account records owned by User A with User A and

records owned by I-Jser B with user B.

• For the sharing rule criteria, specify that records owned by User A are shared with user

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

Ownership:

• Ensure that the Account records are owned by the respective users, with User A owning

their records and User B owning their records.

Organization-Wide Defaults:

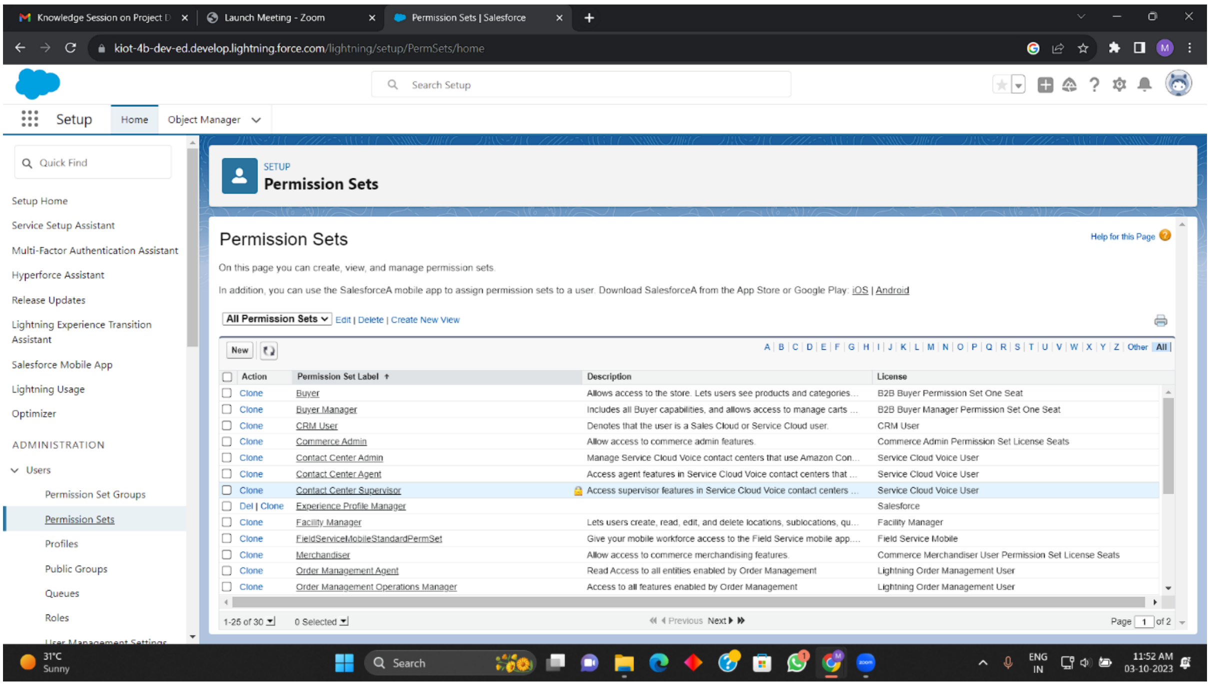
• Set the organization-wide defaults for the Account object to "Private" to ensure that

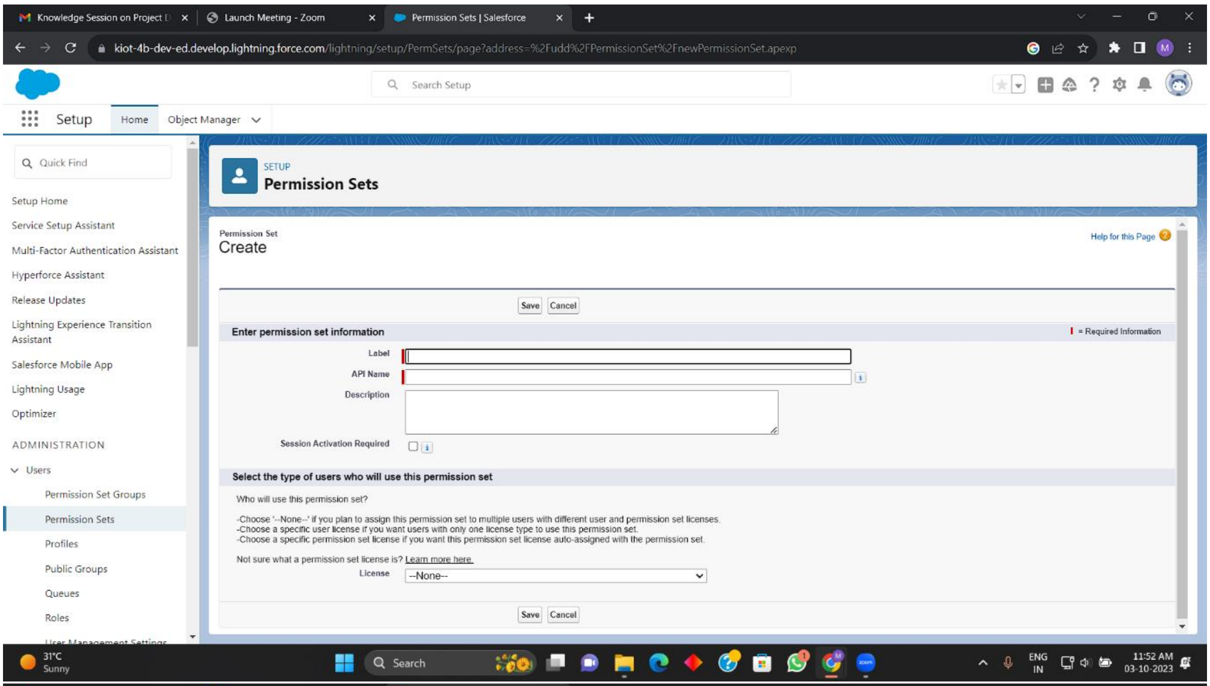
records are private by default.

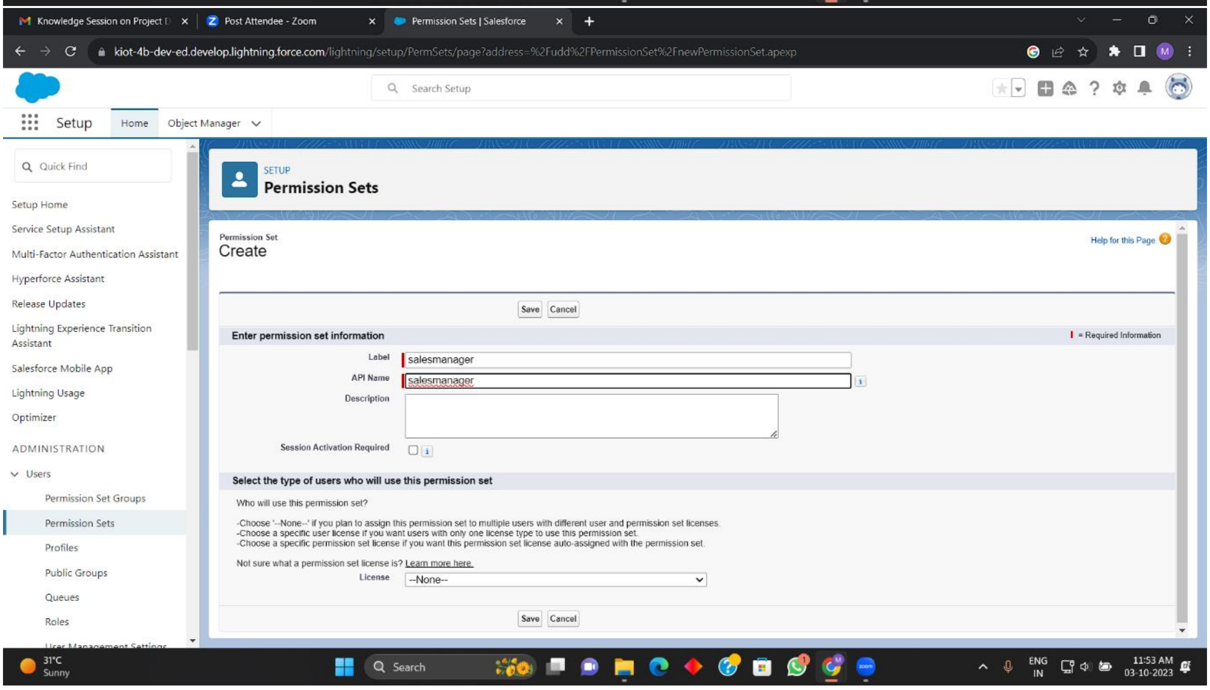
Testing:

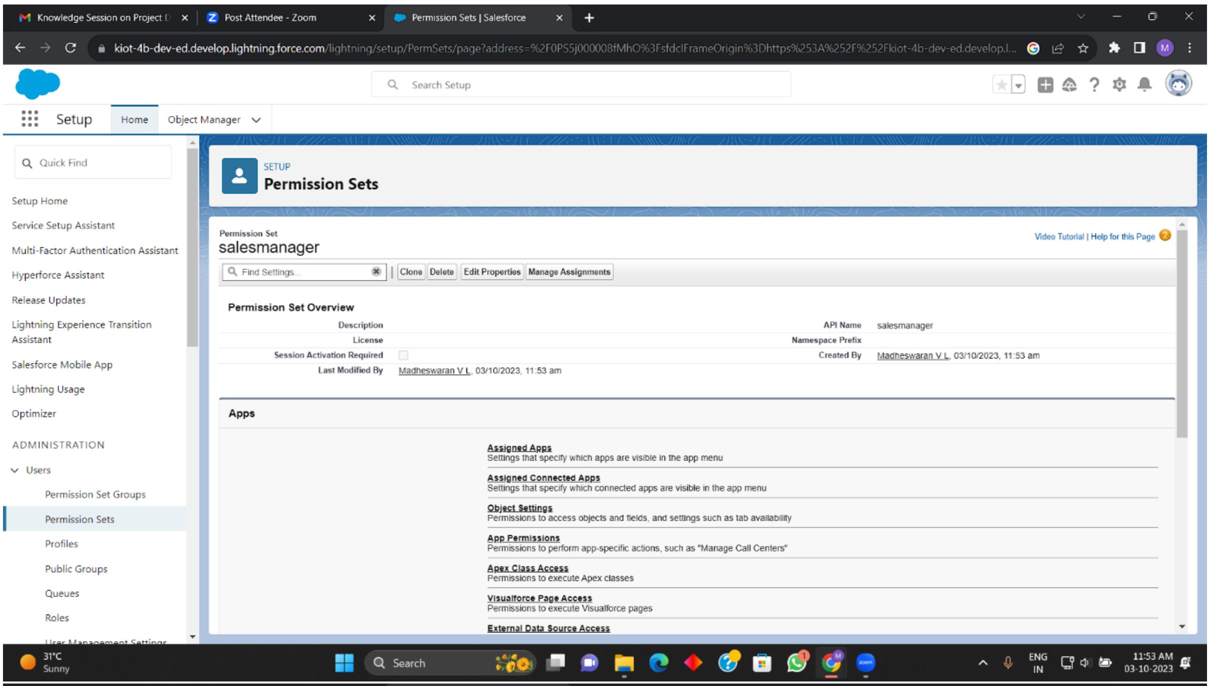
• Test the setup by logging in as User A and User B separately to verify that they cannot

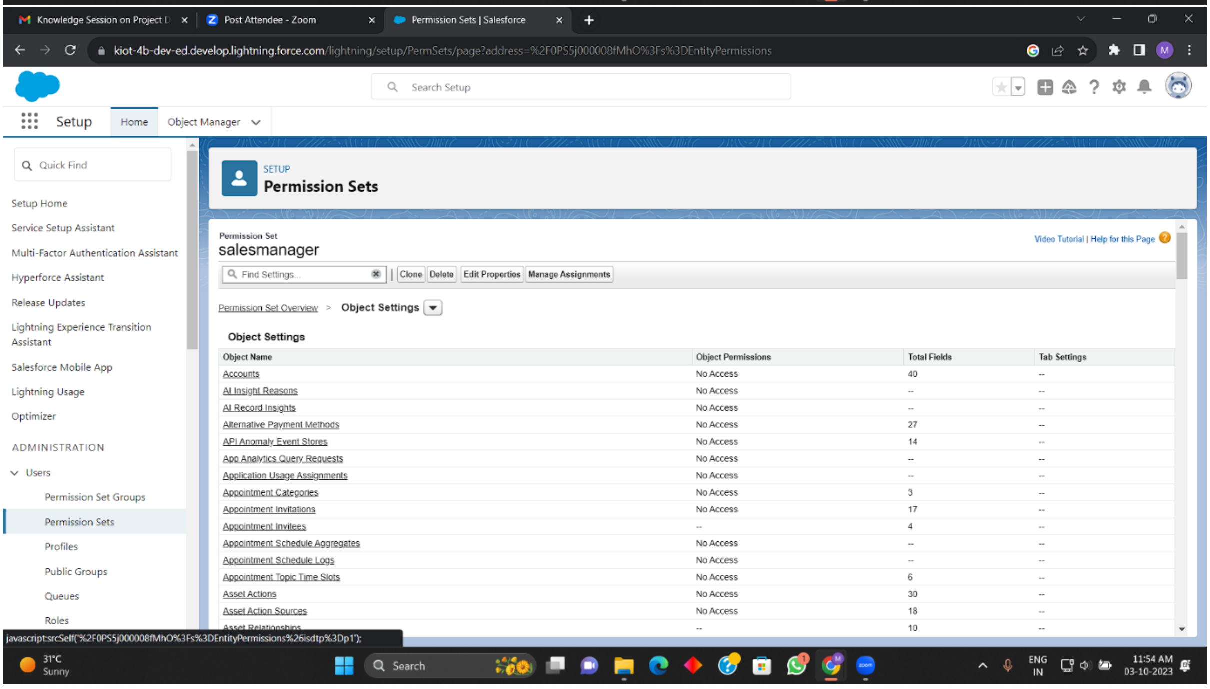
access each other's records.

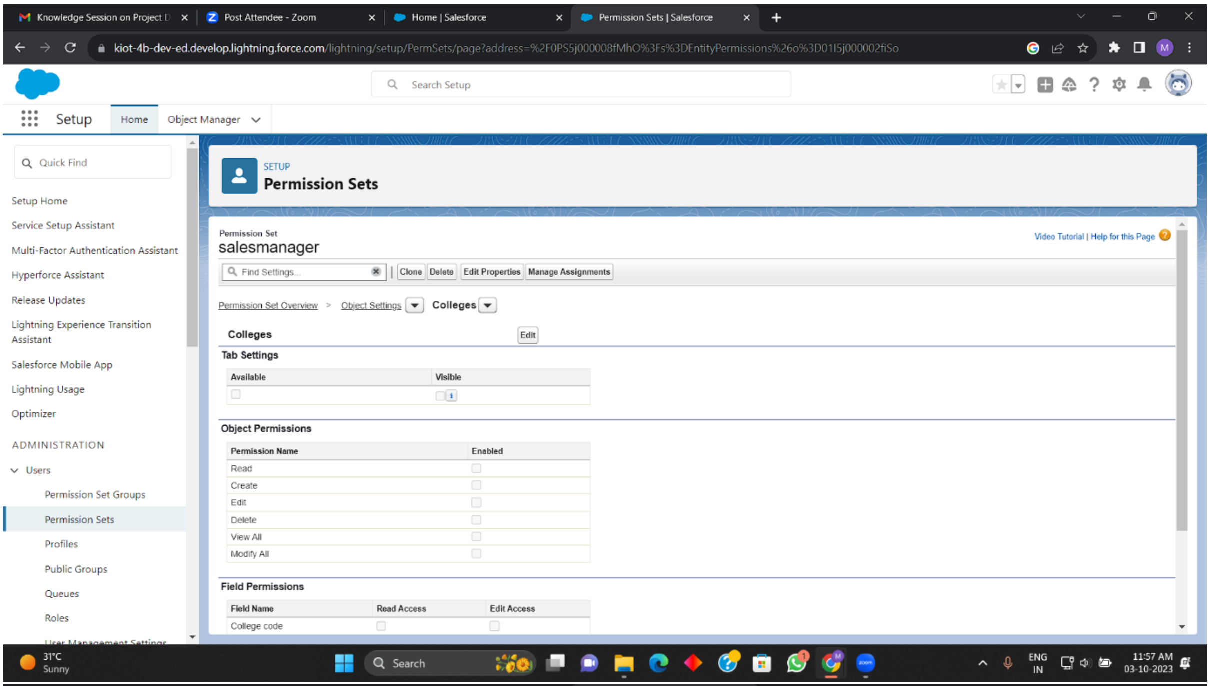


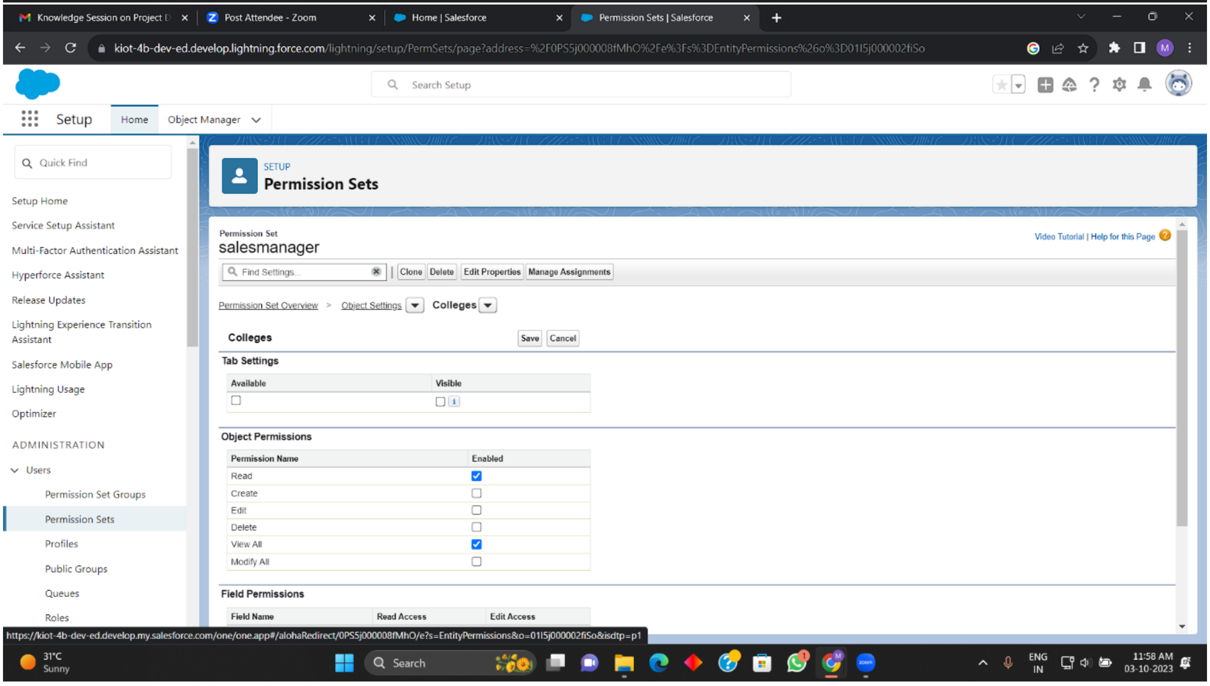

Knowledge Session on Project
Launch Meeting - Zoom
Permission Sets | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
SETUP
Permission Sets
Permission Set
Create
Help for this Page
Save
Cancel
Enter permission set information
= Required 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
--None--
Save
Cancel
31°C
Sunny
Search
ENG
IN
11:52 AM
03-10-2023

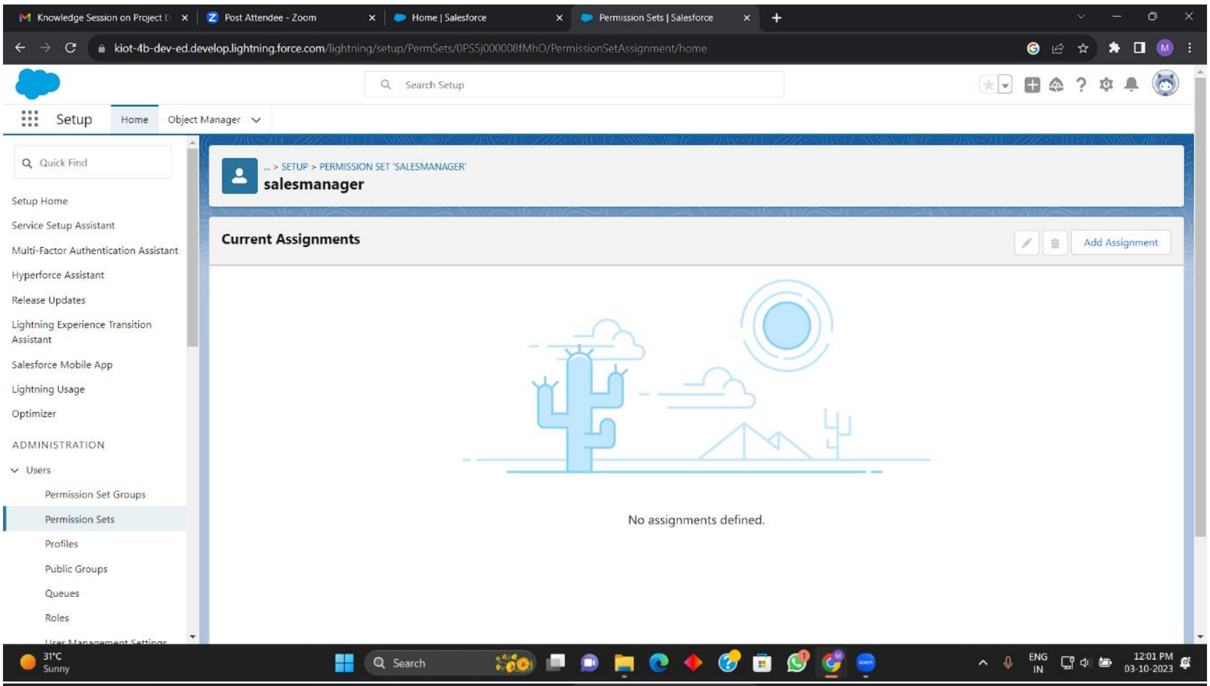

Knowledge Session on Project
Post Attendee - Zoom
Permission Sets | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
SETUP
Permission Sets
Permission Set
Create
Help for this Page
Save
Cancel
Enter permission set information
= Required 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
--None--
Save
Cancel
31°C
Sunny
Search
ENG
IN
11:53 AM
03-10-2023

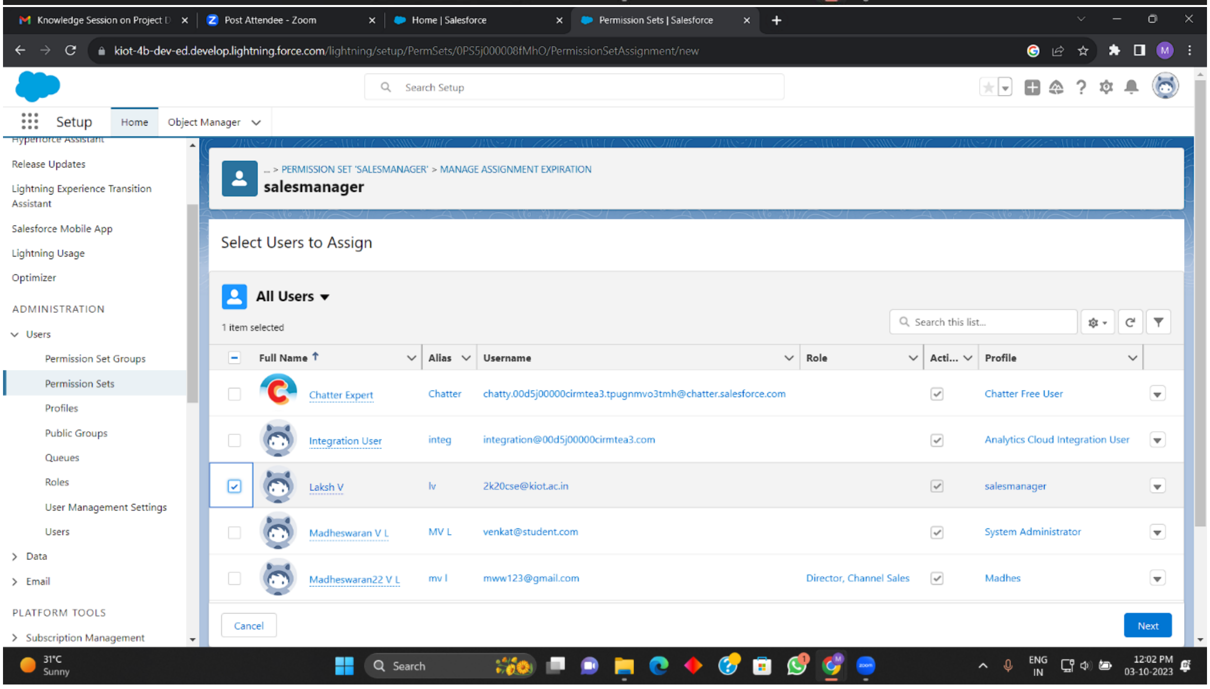

Knowledge Session on Project I
Post Attendee - Zoom
Permission Sets | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008fMhO%3FsfdcIFrameOrigin%3Dhttps%253A%252F%252Fkiot-4b-dev-ed.develop.l...
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
SETUP
Permission Sets
Permission Set
salesmanager
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By Madheswaran V L, 03/10/2023, 11:53 am
API Name salesmanager
Namespace Prefix
Created By Madheswaran V L, 03/10/2023, 11:53 am
Apps
Assigned Apps
Settings that specify which apps are visible in the app menu
Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu
Object Settings
Permissions to access objects and fields, and settings such as tab availability
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access
Permissions to execute Apex classes
Visualforce Page Access
Permissions to execute Visualforce pages
External Data Source Access
31°C
Sunny
Search
ENG
IN
11:53 AM
03-10-2023


Knowledge Session on Project I
Post Attendee - Zoom
Permission Sets | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008fMhO%3Fs%3DEntityPermissions
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
SETUP
Permission Sets
Permission Set
salesmanager
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
Object Settings
Object Name
Object Permissions
Total Fields
Tab Settings
Accounts No Access 40 --
AI Insight Reasons No Access -- --
AI Record Insights No Access -- --
Alternative Payment Methods No Access 27 --
API 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 --
javascript:srcSelf('%2F0PS5j000008fMhO%3Fs%3DEntityPermissions%26isdtp%3Dp1');
31°C
Sunny
Search
ENG
IN
11:54 AM
03-10-2023






Knowledge Session on Project
Post Attendee - Zoom
Home | Salesforce
Permission Sets | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008fMhO/PermissionSetAssignment/home
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
... > SETUP > PERMISSION SET 'SALESMANAGER'
salesmanager
Current Assignments
Add Assignment
No assignments defined.
31°C
Sunny
Search
ENG
IN
12:01 PM
03-10-2023


Knowledge Session on Project
Post Attendee - Zoom
Home | Salesforce
Permission Sets | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008fMhO/PermissionSetAssignment/new
Search Setup
Setup
Home
Object Manager
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
... > PERMISSION SET 'SALESMANAGER' > MANAGE ASSIGNMENT EXPIRATION
salesmanager
Select Users to Assign
All Users
1 item selected
Search this list...
Full Name
Alias
Username
Role
Acti...
Profile
Chatter Expert
Chatter
chatty.00d5j00000cirmtea3.tpugnmvo3tmh@chatter.salesforce.com
Chatter Free User
Integration User
integ
integration@00d5j00000cirmtea3.com
Analytics Cloud Integration User
Laksh V
lv
2k20cse@kiot.ac.in
salesmanager
Madheswaran V L
MV L
venkat@student.com
System Administrator
Madheswaran22 V L
mv l
mww123@gmail.com
Director, Channel Sales
Madhes
Cancel
Next
31°C
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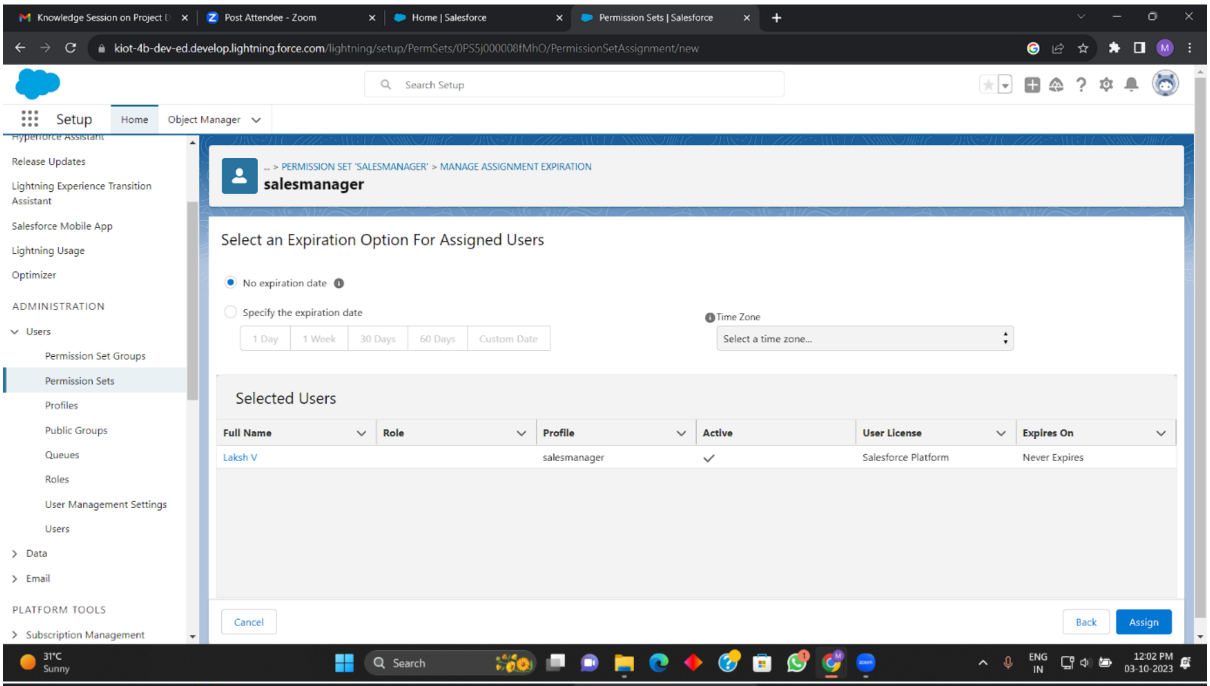
03-10-2023


Knowledge Session on Project
Post Attendee - Zoom
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Permission Sets | Salesforce
kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008fMhO/PermissionSetAssignment/new
Search Setup
Setup
Home
Object Manager
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
... > PERMISSION SET 'SALESMANAGER' > MANAGE ASSIGNMENT EXPIRATION
salesmanager
Select an Expiration Option For Assigned Users
No expiration date
Specify the expiration date
1 Day
1 Week
30 Days
60 Days
Custom Date
Time Zone
Select a time zone...
Selected Users
Full Name
Role
Profile
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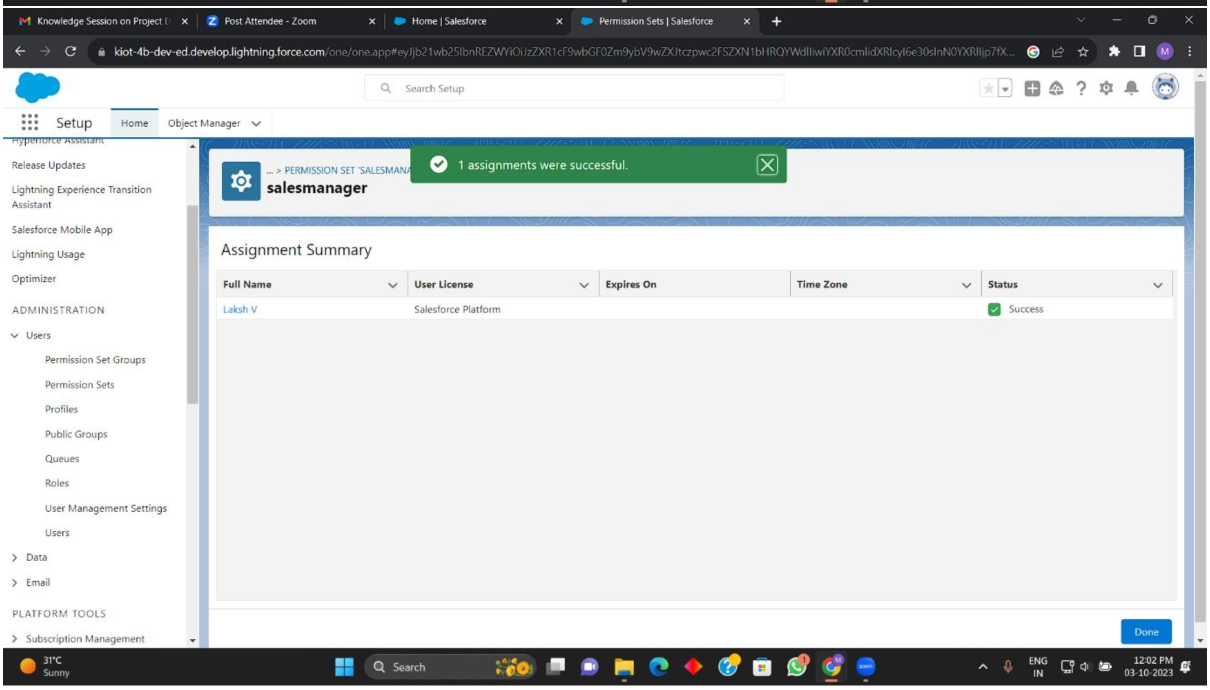
03-10-2023


Knowledge Session on Project
Post Attendee - Zoom
Home | Salesforce
Permission Sets | Salesforce
Search Setup
Setup
Home
Object Manager
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
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User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
... > PERMISSION SET 'SALESMANA
1 assignments were successful.
salesmanager
Assignment Summary
Full Name
User License
Expires On
Time Zone
Status
Laksh V
Salesforce Platform
Success
Done
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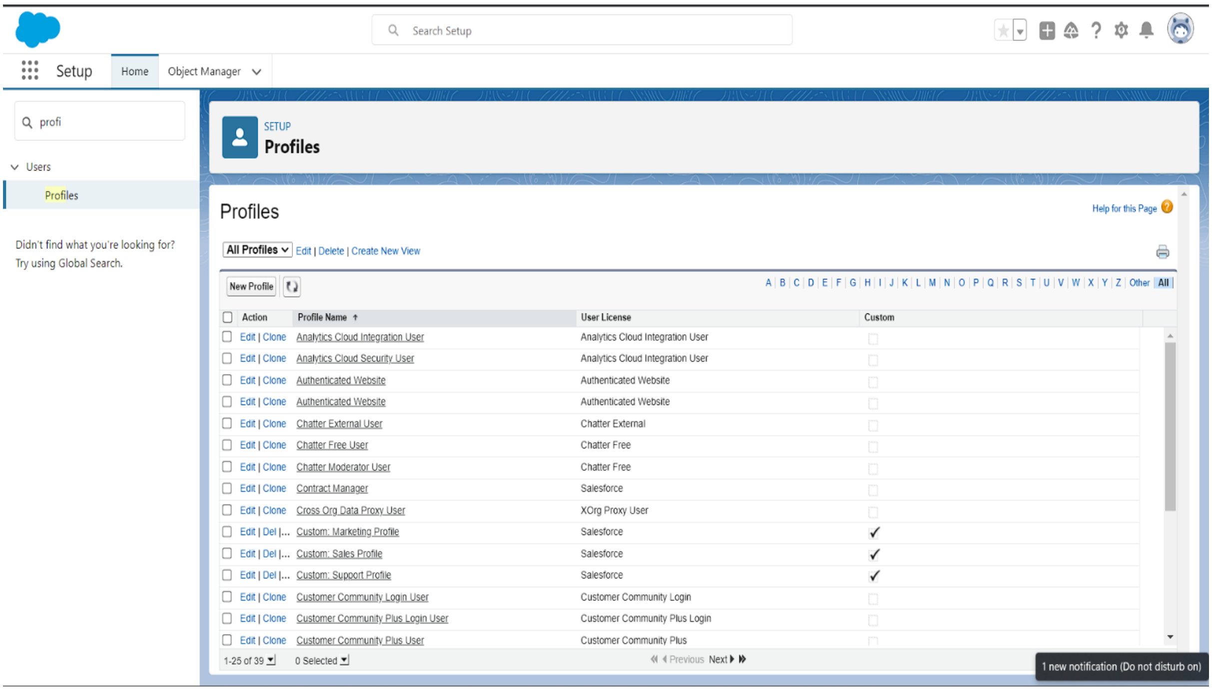
12:02 PM
03-10-2023

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:

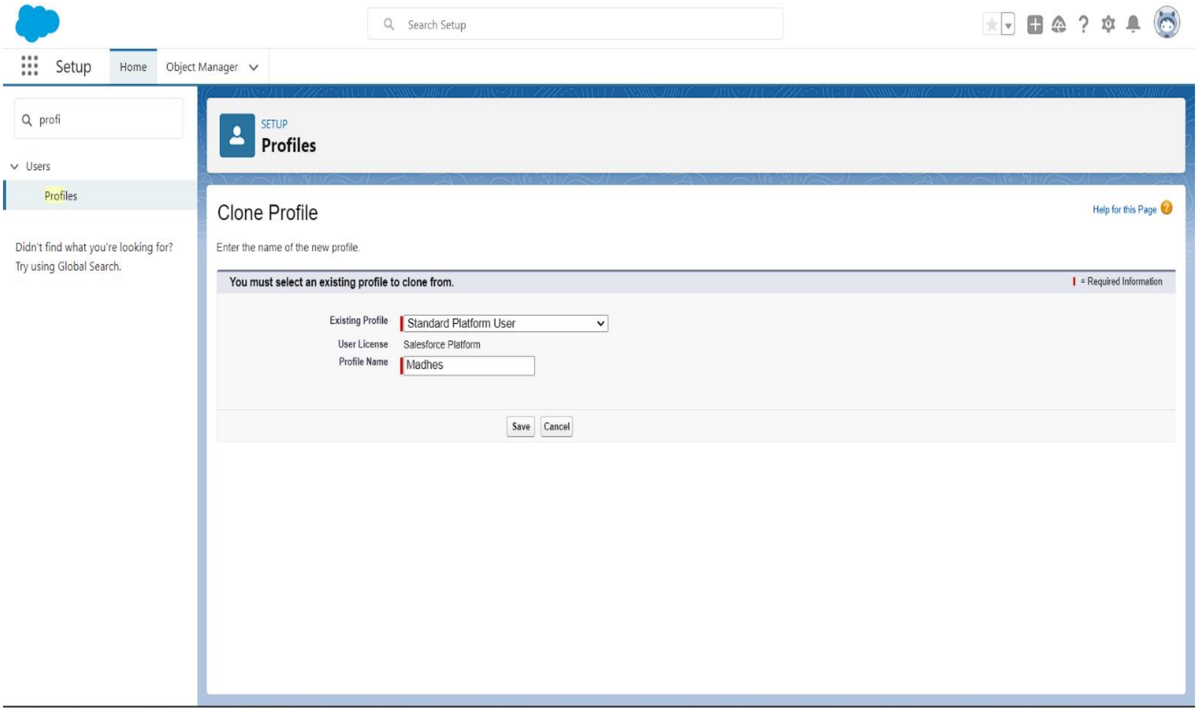
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

<u>Setup-quick search[profile]</u>



Step 2:

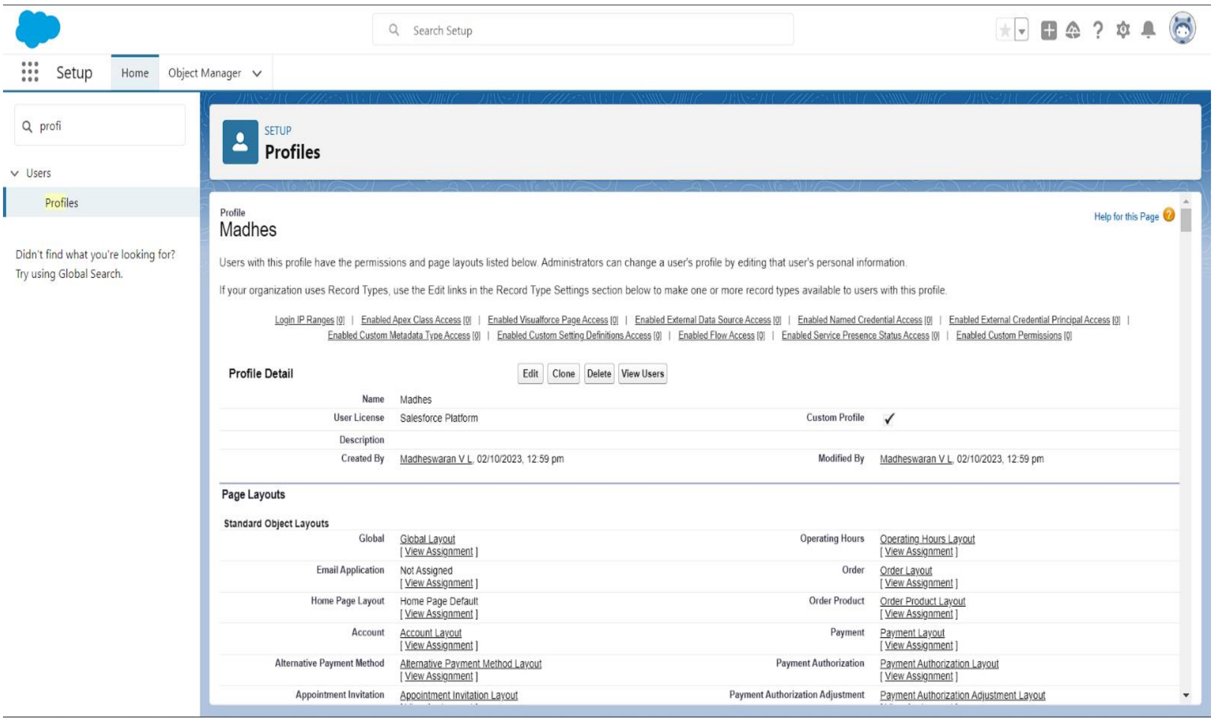
Click on the new to create a new profile along with the label and Api

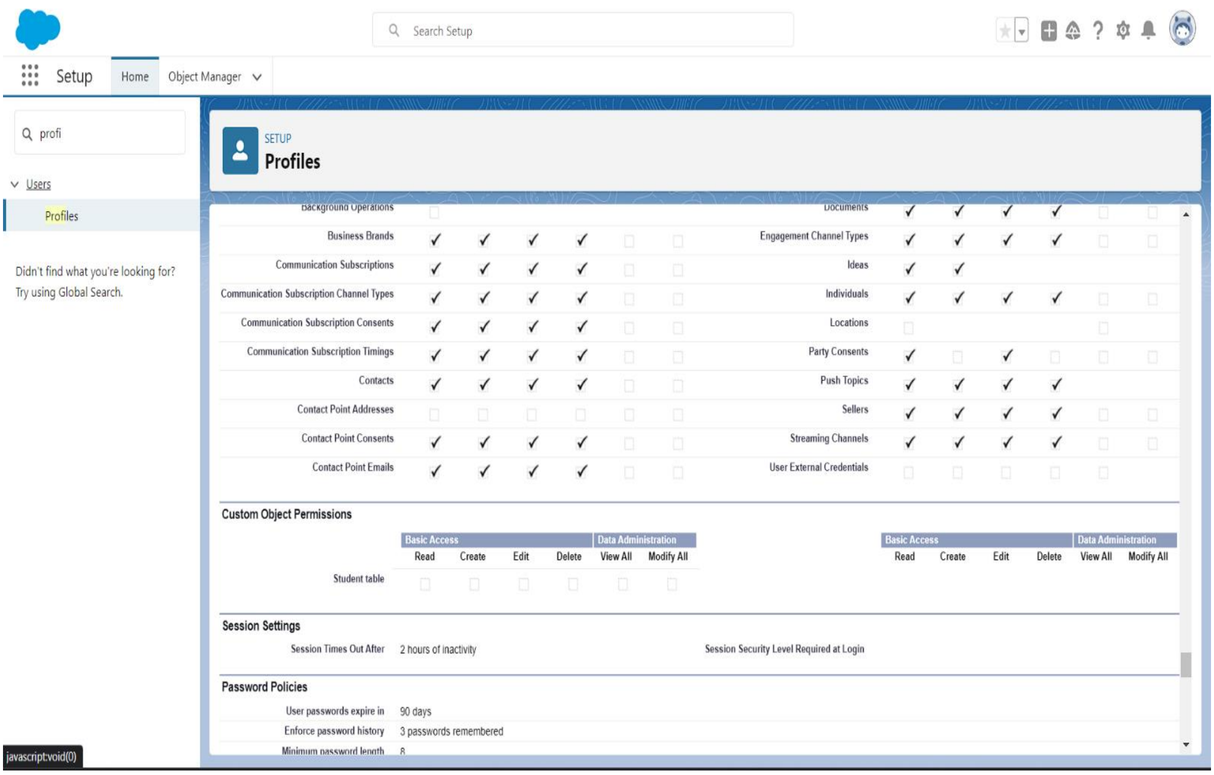


Here I had made it my profile name as Madhes and the existing profile as Standard Platform User.

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.


Search Setup
Setup
Home
Object Manager
profi
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile
Madhes
Help for this Page
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 [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] |
Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]
Profile Detail
Edit
Clone
Delete
View Users
Name Madhes
User License Salesforce Platform
Custom Profile
Description
Created By Madheswaran V L, 02/10/2023, 12:59 pm
Modified By Madheswaran V L, 02/10/2023, 12:59 pm
Page Layouts
Standard Object Layouts
Global Global Layout [View Assignment]
Operating Hours Operating Hours Layout [View Assignment]
Email Application Not Assigned [View Assignment]
Order Order Layout [View Assignment]
Home Page Layout Home Page Default [View Assignment]
Order Product Order Product Layout [View Assignment]
Account Account Layout [View Assignment]
Payment Payment Layout [View Assignment]
Alternative Payment Method Alternative Payment Method Layout [View Assignment]
Payment Authorization Payment Authorization Layout [View Assignment]
Appointment Invitation Appointment Invitation Layout
Payment Authorization Adjustment Payment Authorization Adjustment Layout


Search Setup
Setup
Home
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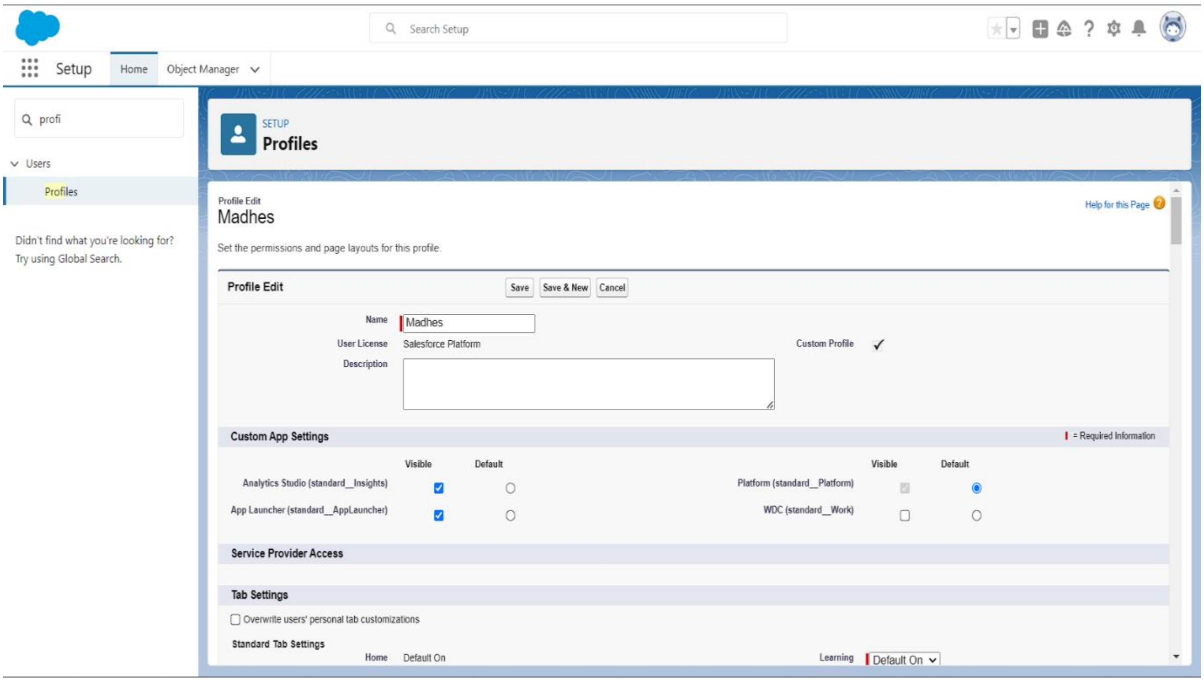
profi
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
javascript:void(0)
SETUP
Profiles
Business Brands
Engagement Channel Types
Communication Subscriptions
Ideas
Communication Subscription Channel Types
Individuals
Communication Subscription Consents
Locations
Communication Subscription Timings
Party Consents
Contacts
Push Topics
Contact Point Addresses
Sellers
Contact Point Consents
Streaming Channels
Contact Point Emails
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read Create Edit Delete View All Modify All
Student table
Session Settings
Session Times Out After 2 hours of inactivity
Session Security Level Required at Login
Password Policies
User passwords expire in 90 days
Enforce password history 3 passwords remembered
Minimum password length 8


Search Setup
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Home
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Users
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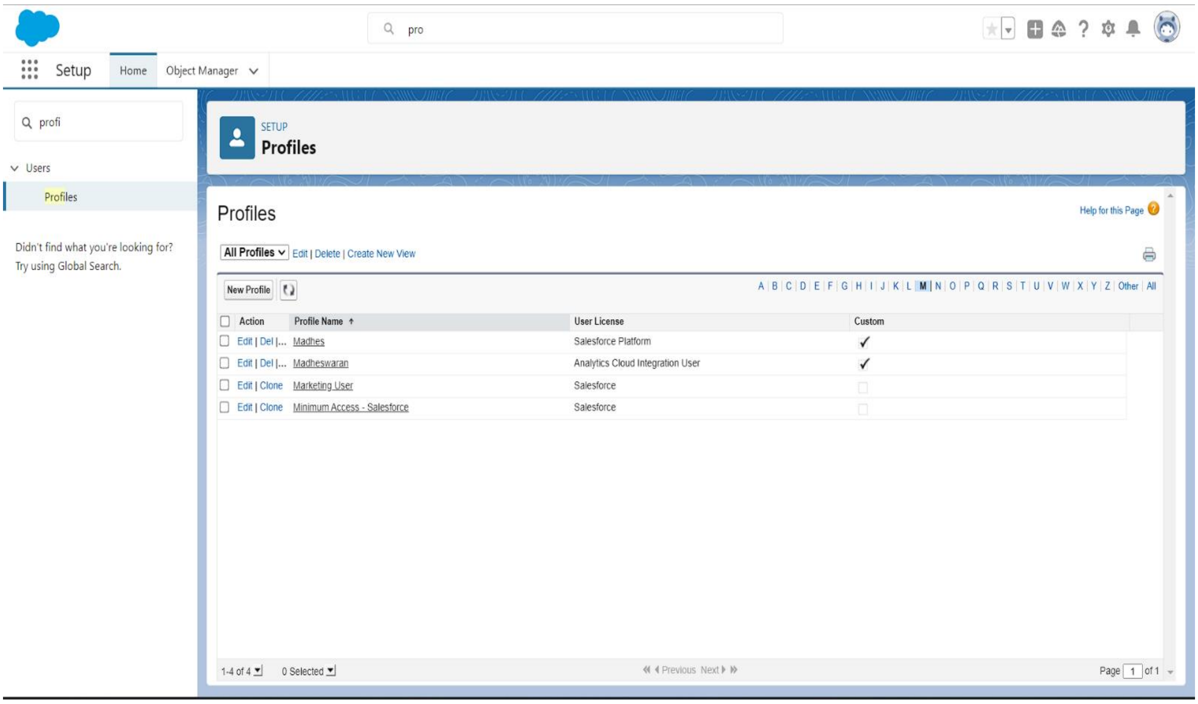
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Profile Edit
Madhes
Help for this Page
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
Madhes
User License
Salesforce Platform
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Platform (standard__Platform)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Home
Default On
Learning
Default On


pro
Setup
Home
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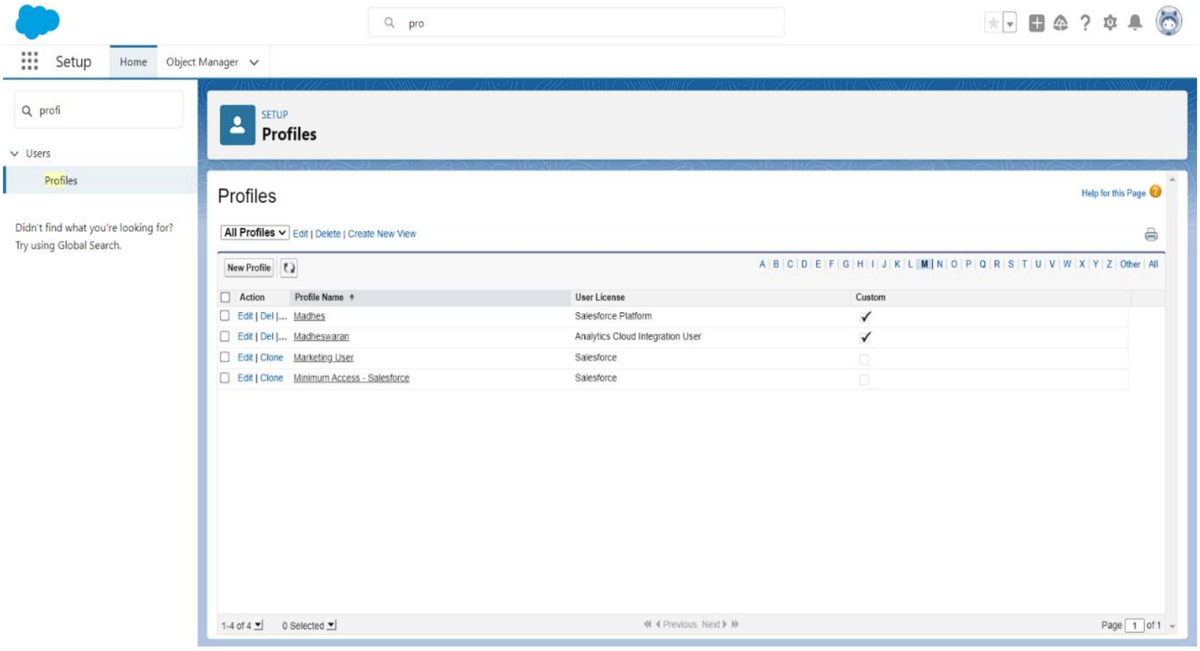
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action
Profile Name
User License
Custom
Edit | Del | ... Madhes Salesforce Platform
Edit | Del | ... Madheswaran Analytics Cloud Integration User
Edit | Clone Marketing User Salesforce
Edit | Clone Minimum Access - Salesforce Salesforce
1-4 of 4
0 Selected
Previous Next
Page 1 of 1

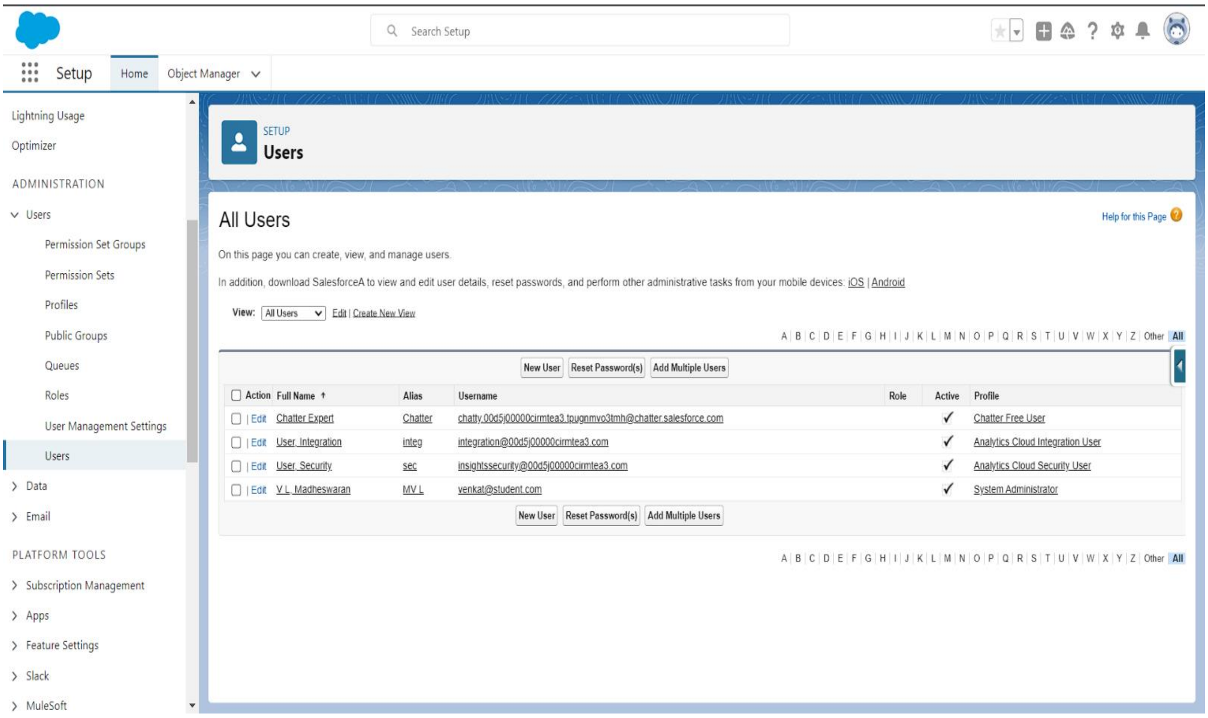
Step 4

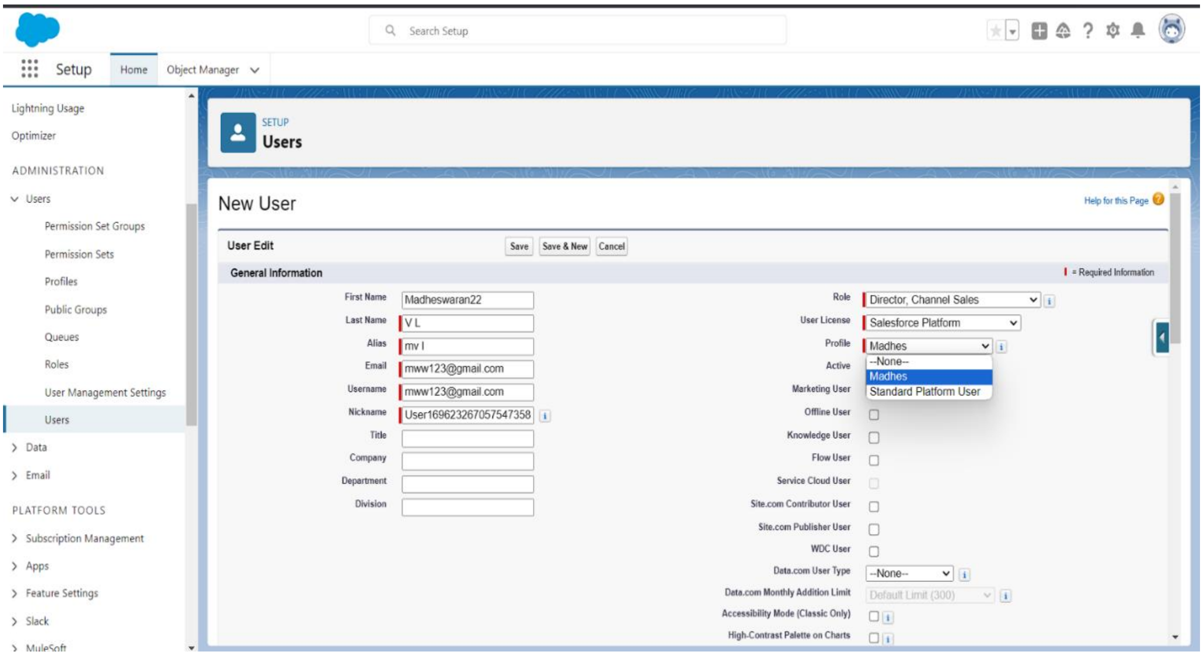
Now you can preview your created profile on the profile option here my profile name madhes has been created with the access of read, create, edit along with view on it

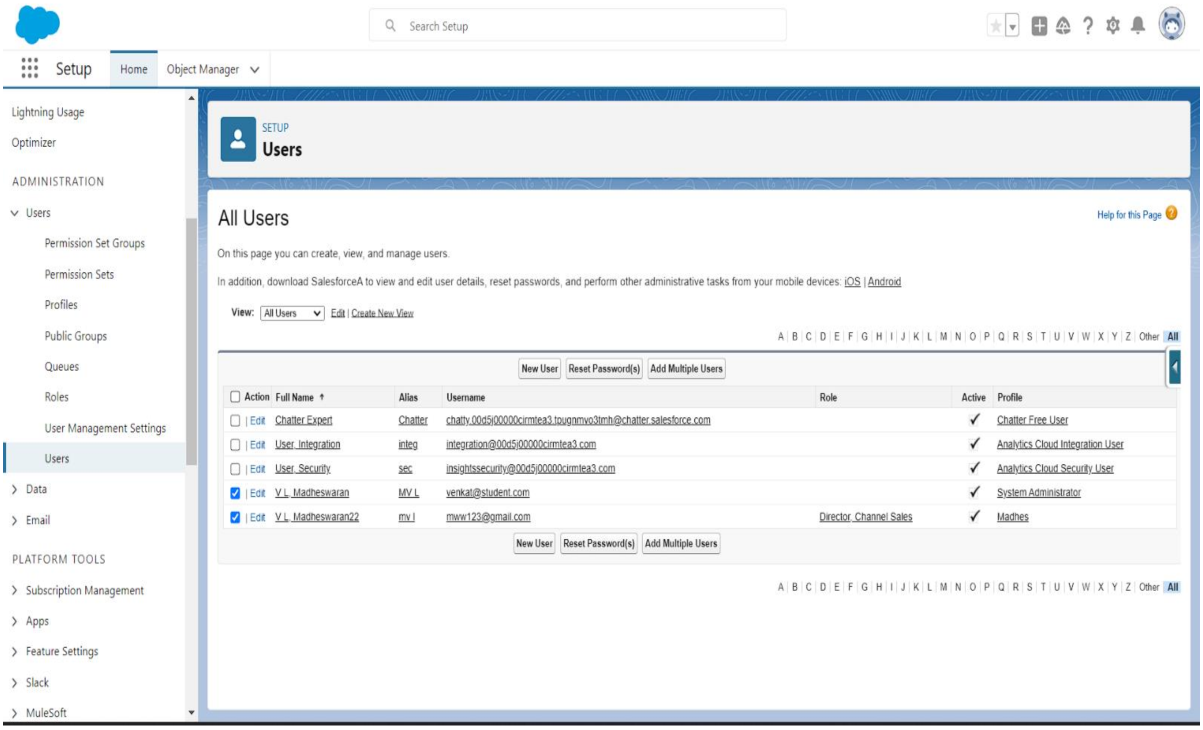


Step 5:

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 Madhes which we have created on the step 2.once the one user has been created click on the save & new so that you can create the second user and there the user name can been created with alternate name but with the same user profile and once the two user are create click on save.



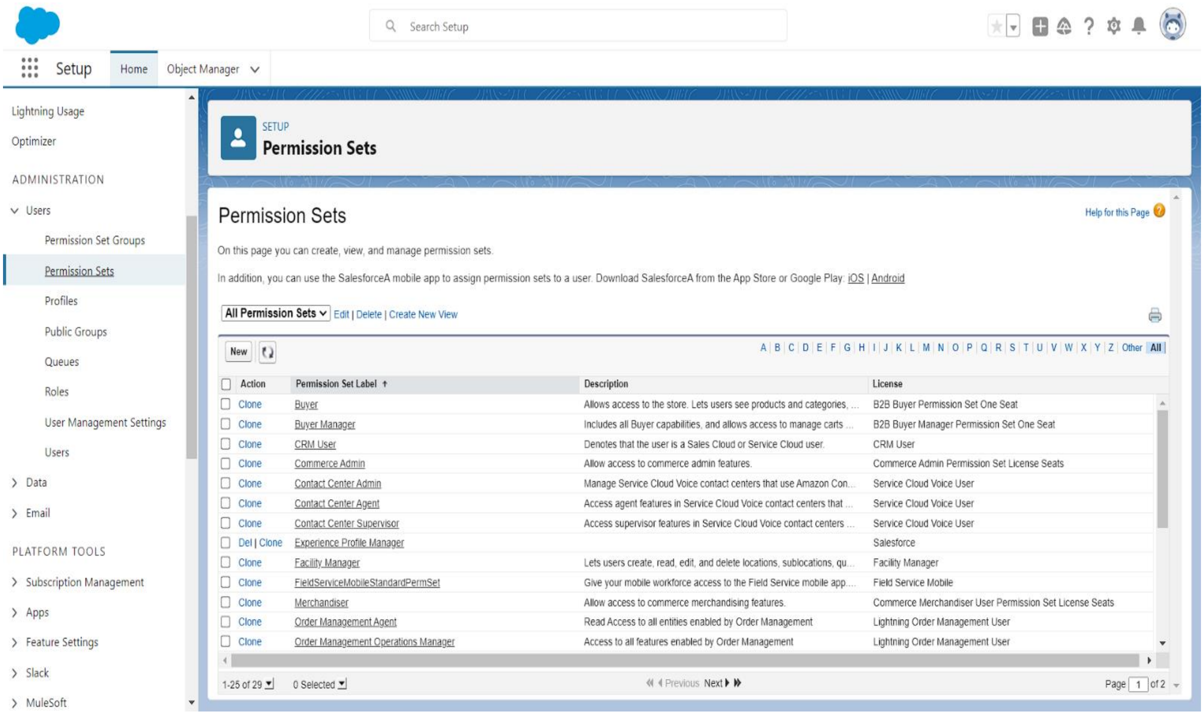


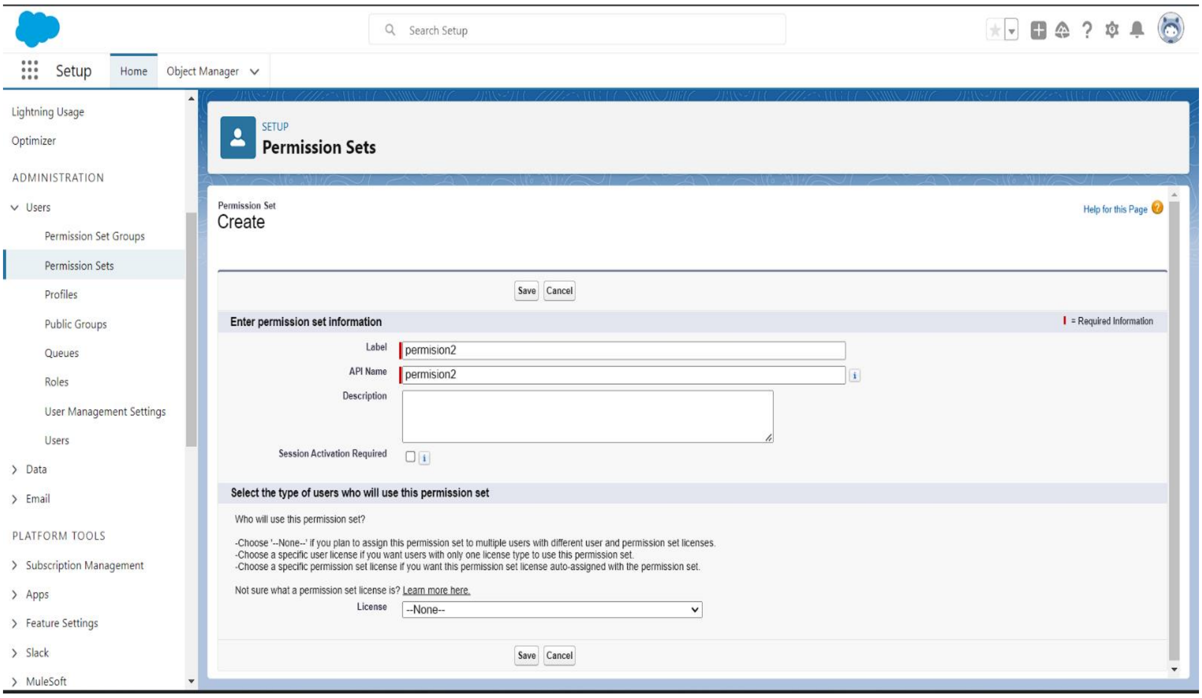


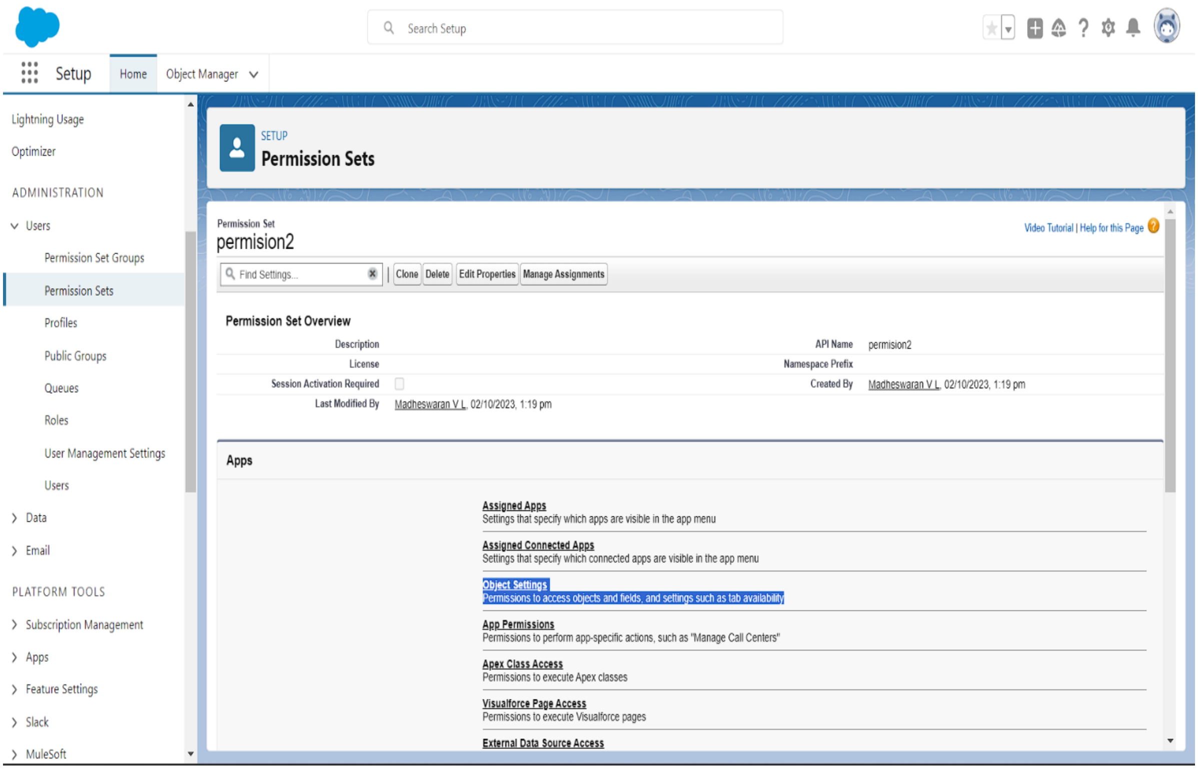
Now you can preview your two user that you have created in my side I had create the two users a Madheswaran and Madheswaran22 as a director channel sales with the marketing team.

Step 6:

Now the two user as been created with the profile so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can created as setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.






Search Setup
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Object Manager
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
SETUP
Permission Sets
Permission Set
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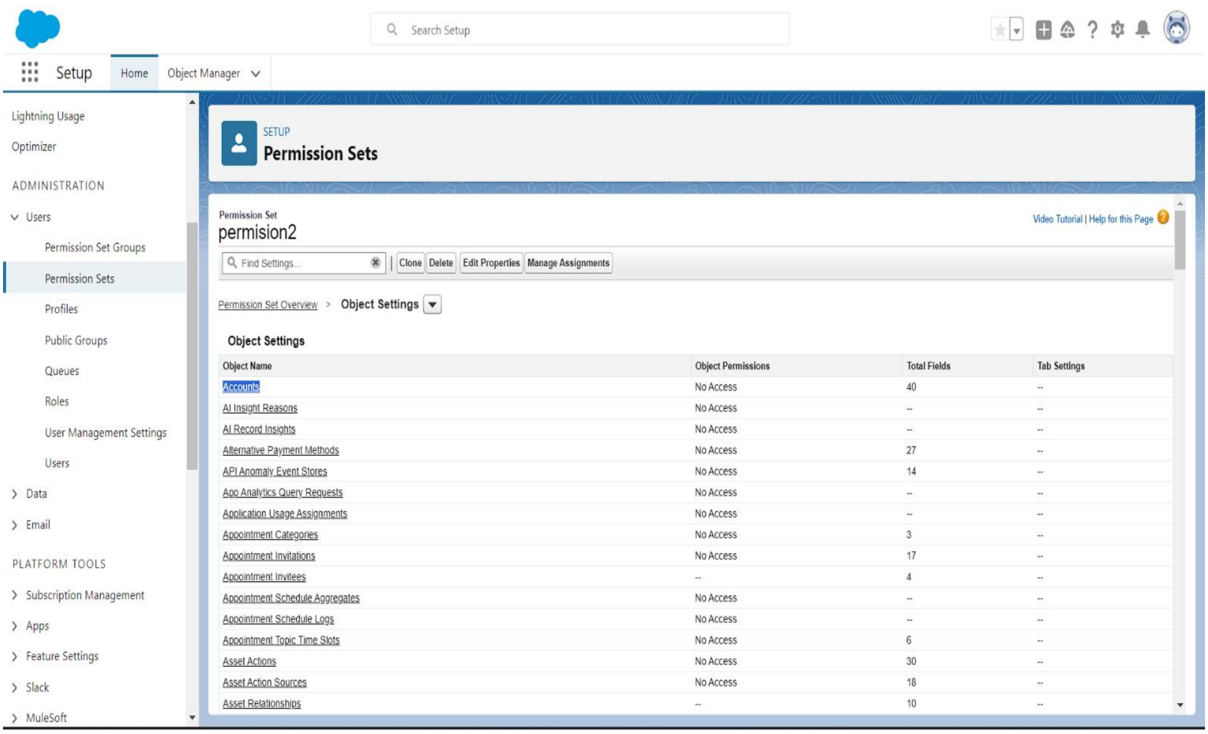
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By
Madheswaran V L, 02/10/2023, 1:19 pm
API Name
permision2
Namespace Prefix
Created By
Madheswaran V L, 02/10/2023, 1:19 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


Search Setup
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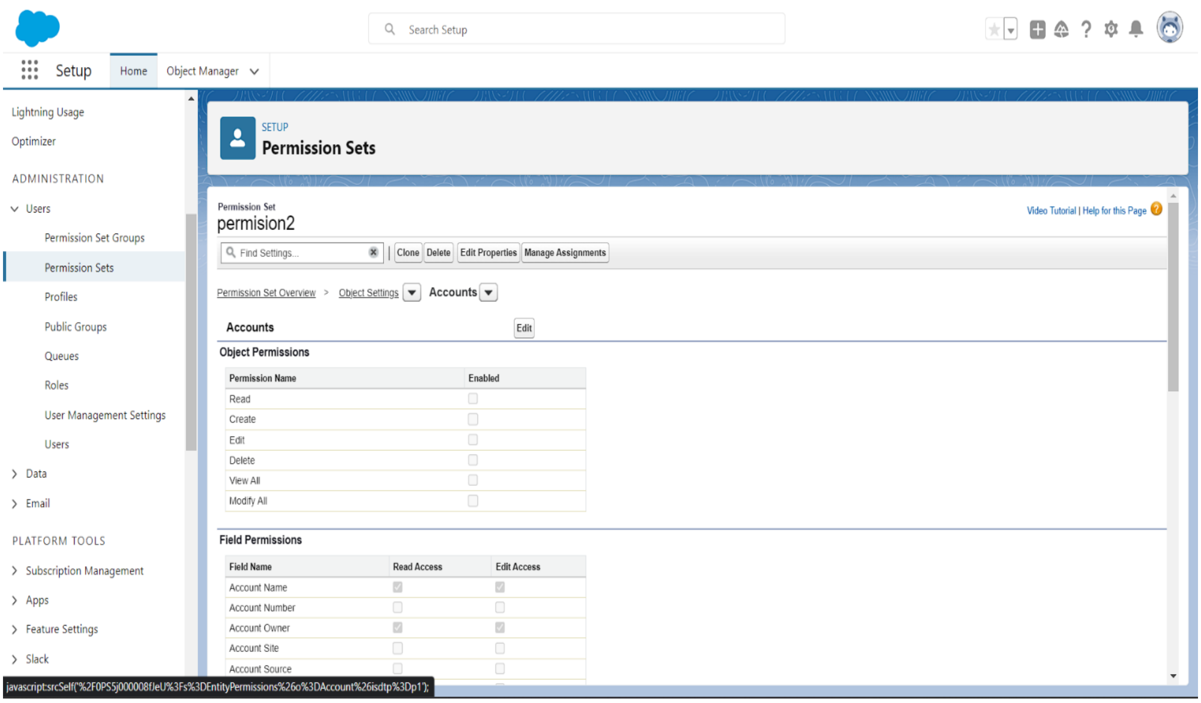
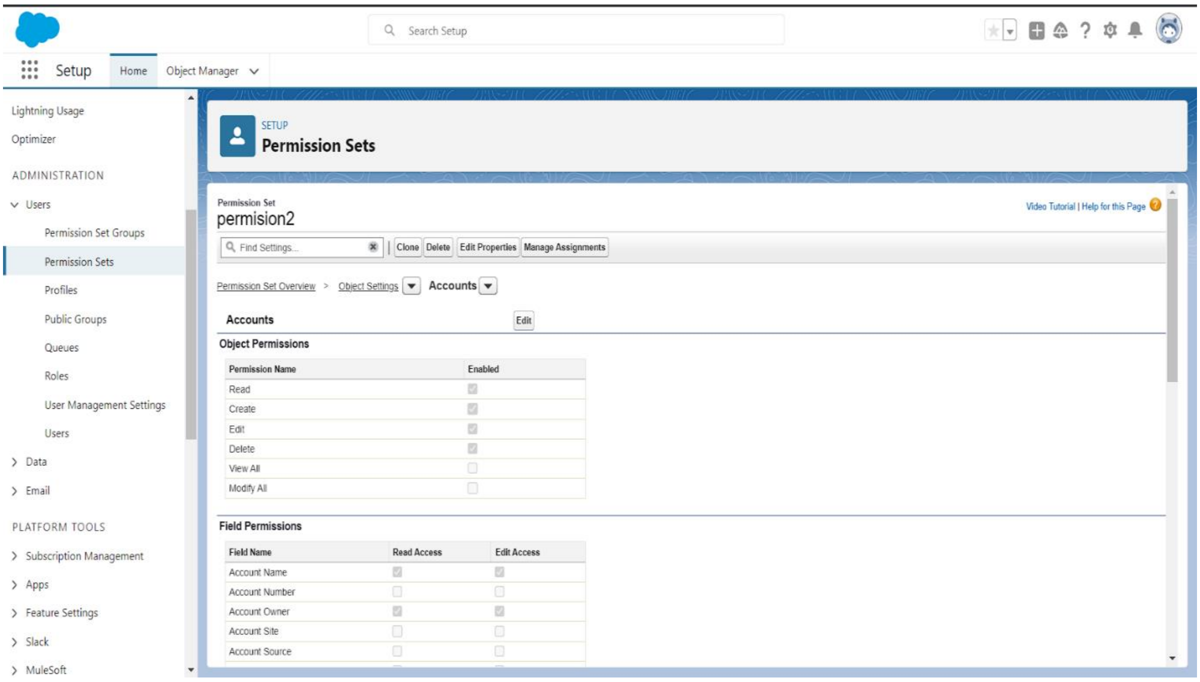
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
SETUP
Permission Sets
Permission Set
permision2
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
Object Settings
Object Name
Object Permissions
Total Fields
Tab Settings
Accounts
No Access
40
AI Insight Reasons
AI Record Insights
Alternative Payment Methods
27
API Anomaly Event Stores
14
App Analytics Query Requests
Application Usage Assignments
Appointment Categories
3
Appointment Invitations
17
Appointment Invitees
4
Appointment Schedule Aggregates
Appointment Schedule Logs
Appointment Topic Time Slots
6
Asset Actions
30
Asset Action Sources
18
Asset Relationships
10

Step 7:

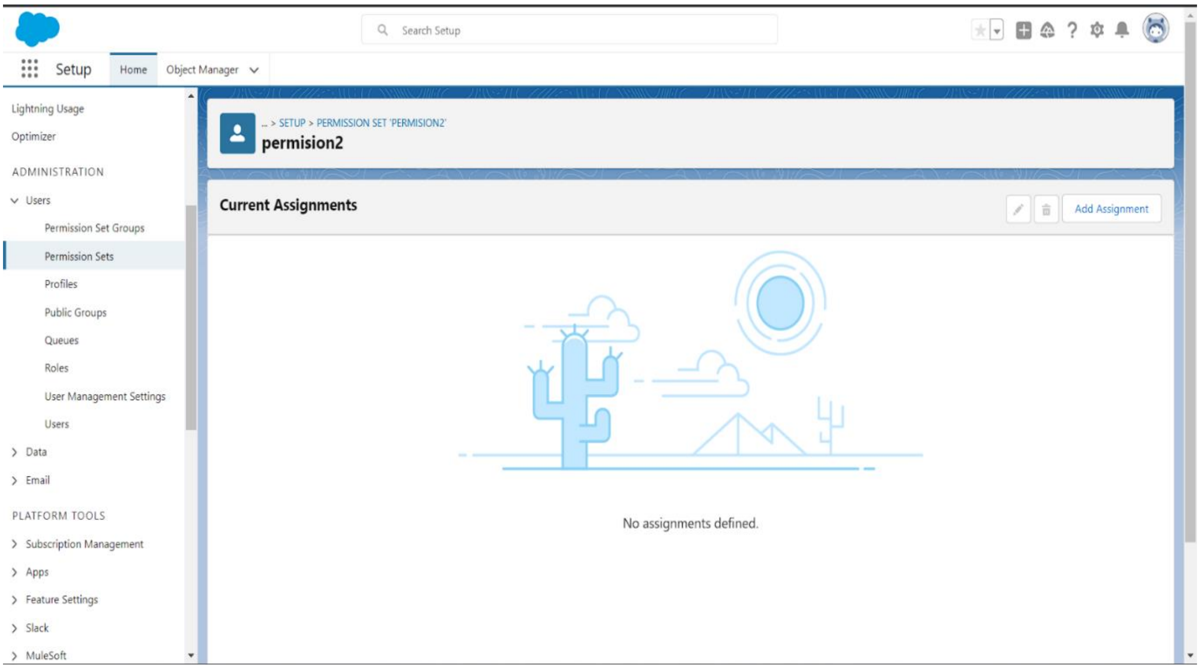
Now to give the specific delete access to the user click on edit on the Account and then enable the read, create, edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

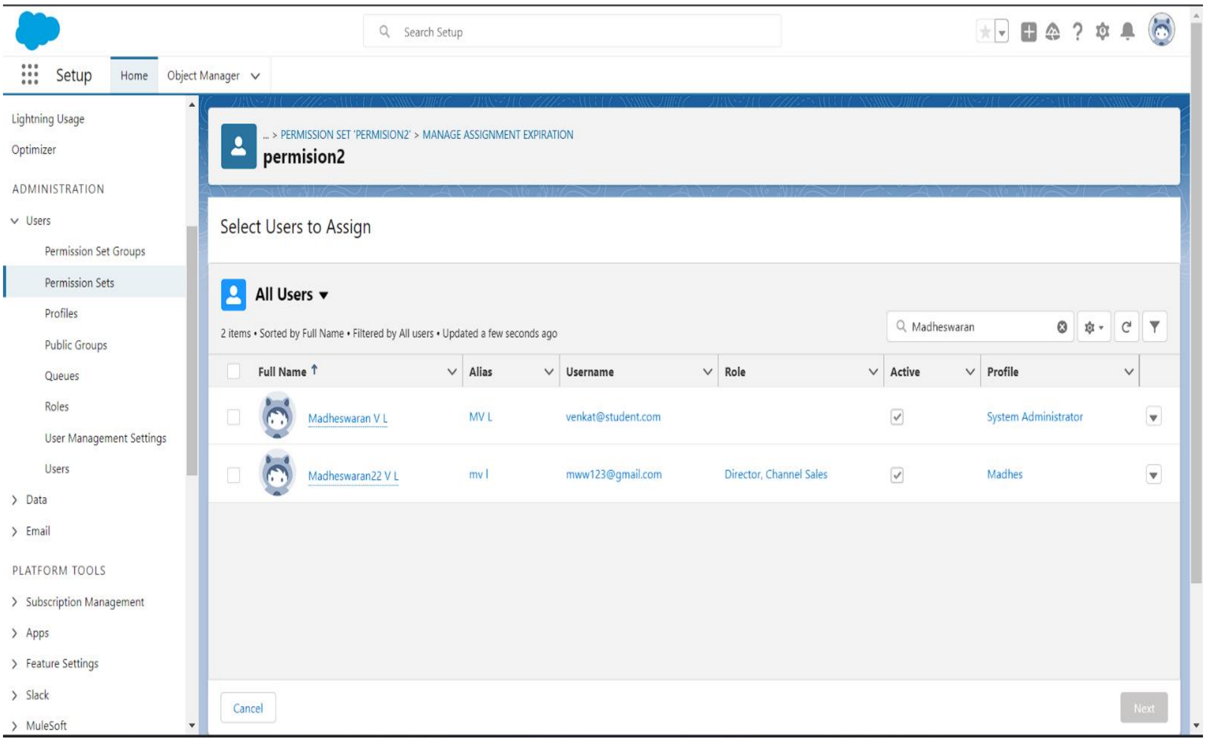


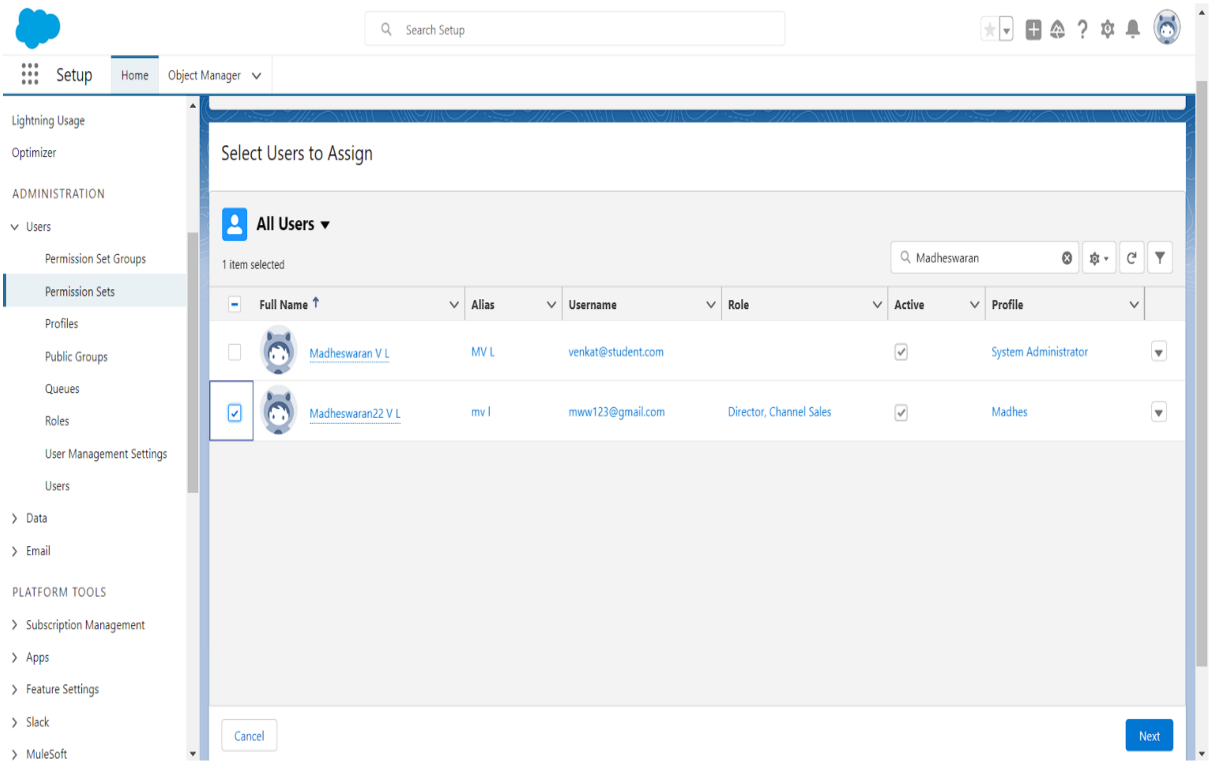


Step 8:

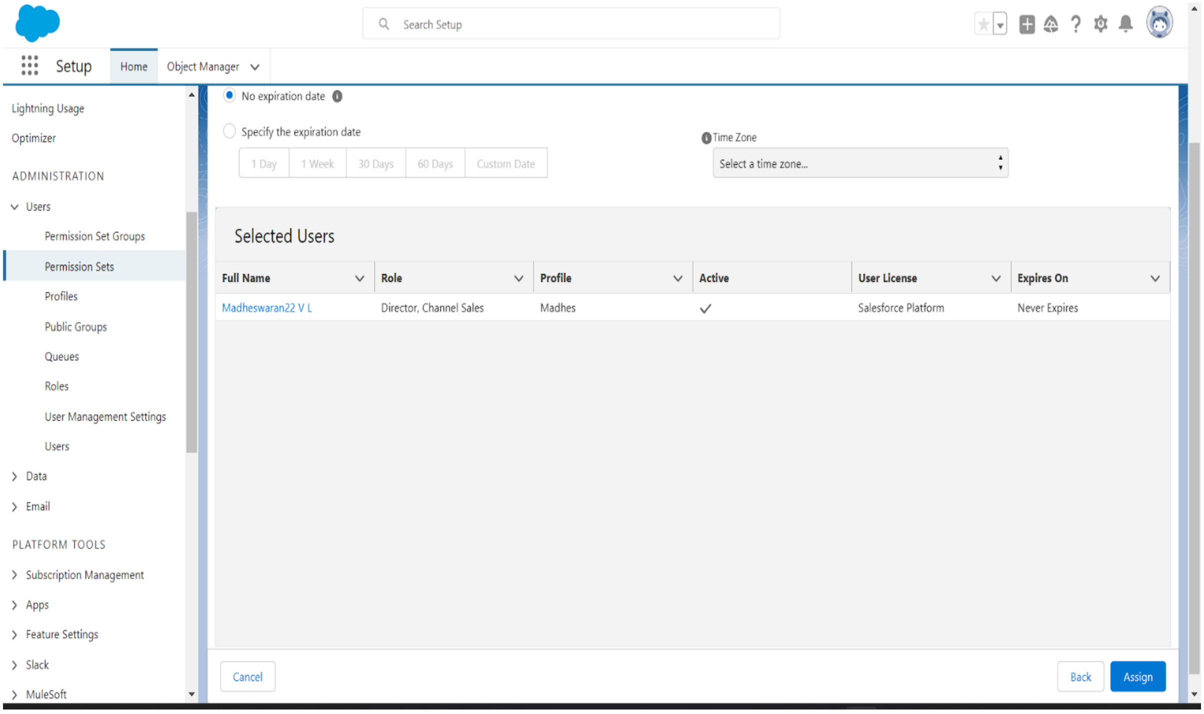
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



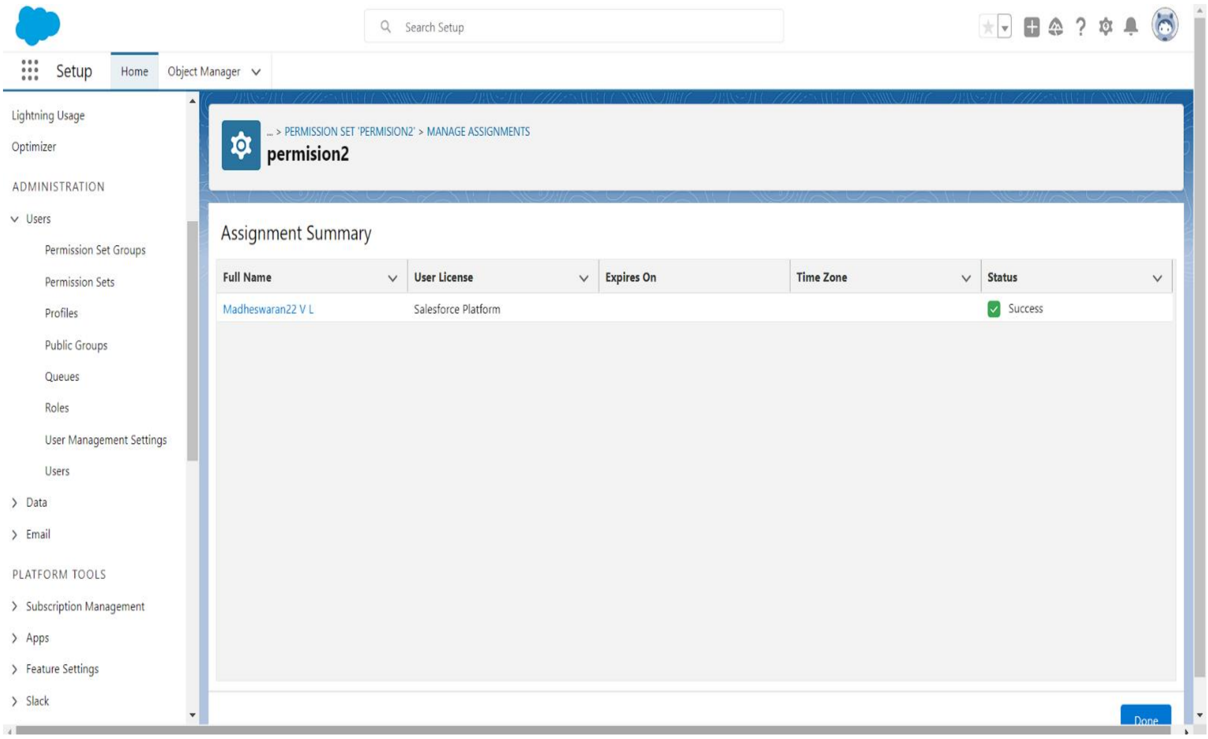




Click on next.



Now click on Assign.



Now the specific access for the Madheswaran22 user has been assigned successfully.

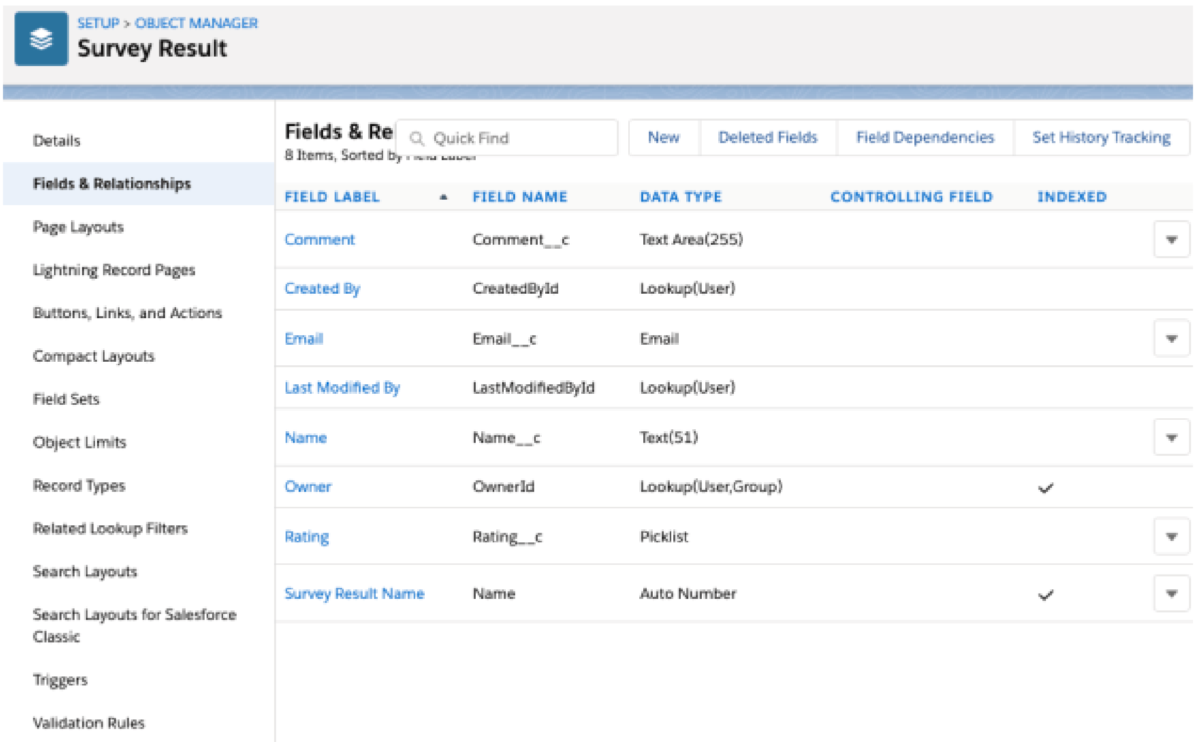
4. Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

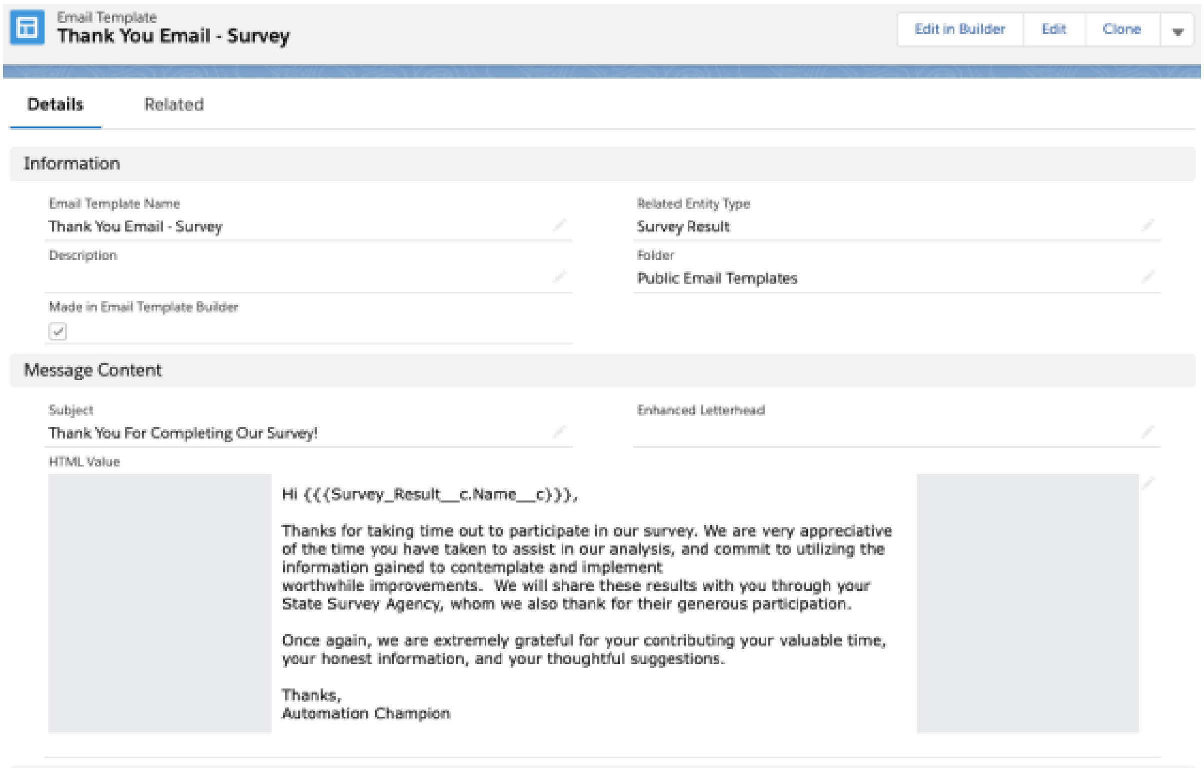
The next step is to create a custom object **Survey Result** and a few custom fields to store survey responses.

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



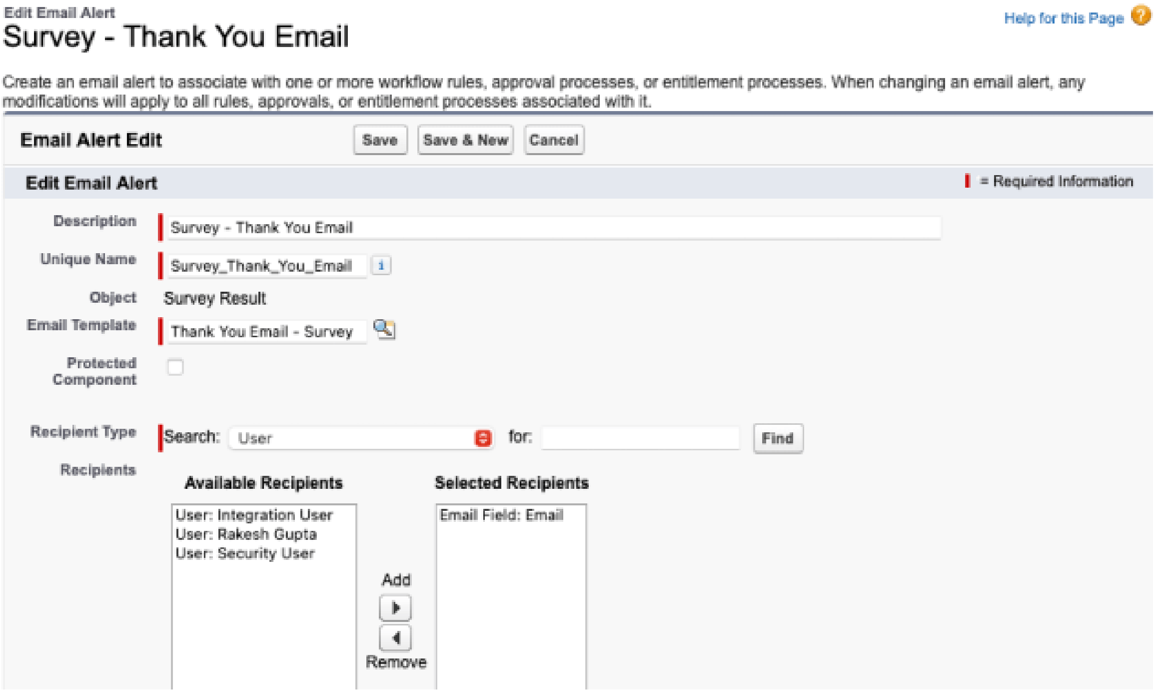
Step 2: Create a Thank You For Survey Lightning Email Template

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.



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**.



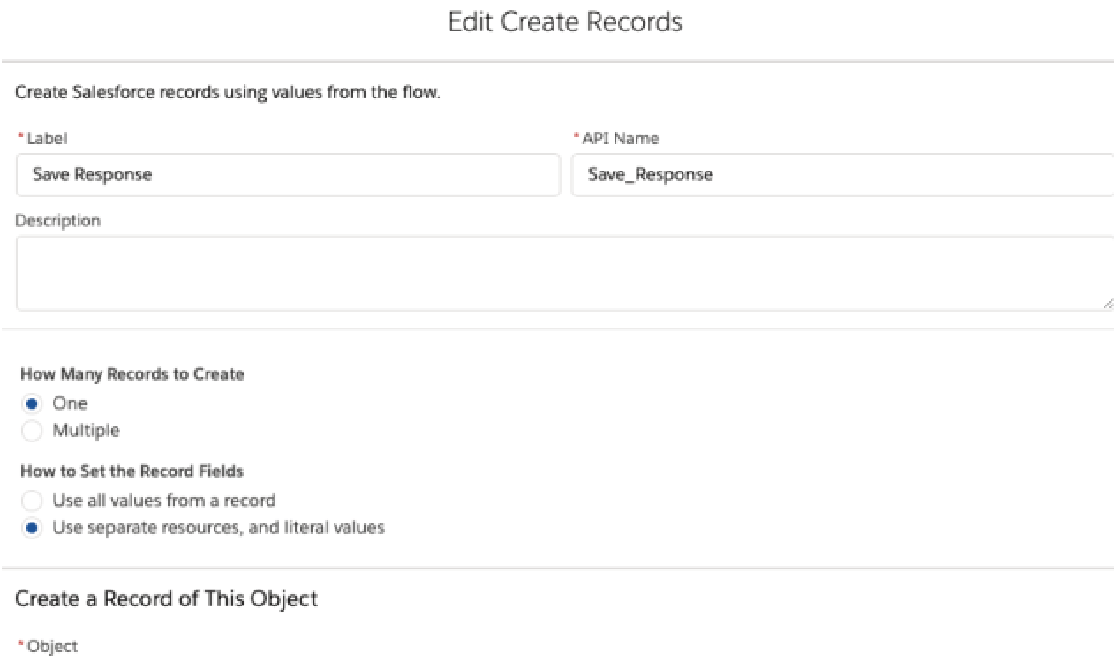
Step 4.1: Salesforce Flow — Create a Screen that Allow Users to Fill Survey

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

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

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

    1. **Field: Rating__c**
    2. **Value: {!Rating}**
7. Click **Done**.

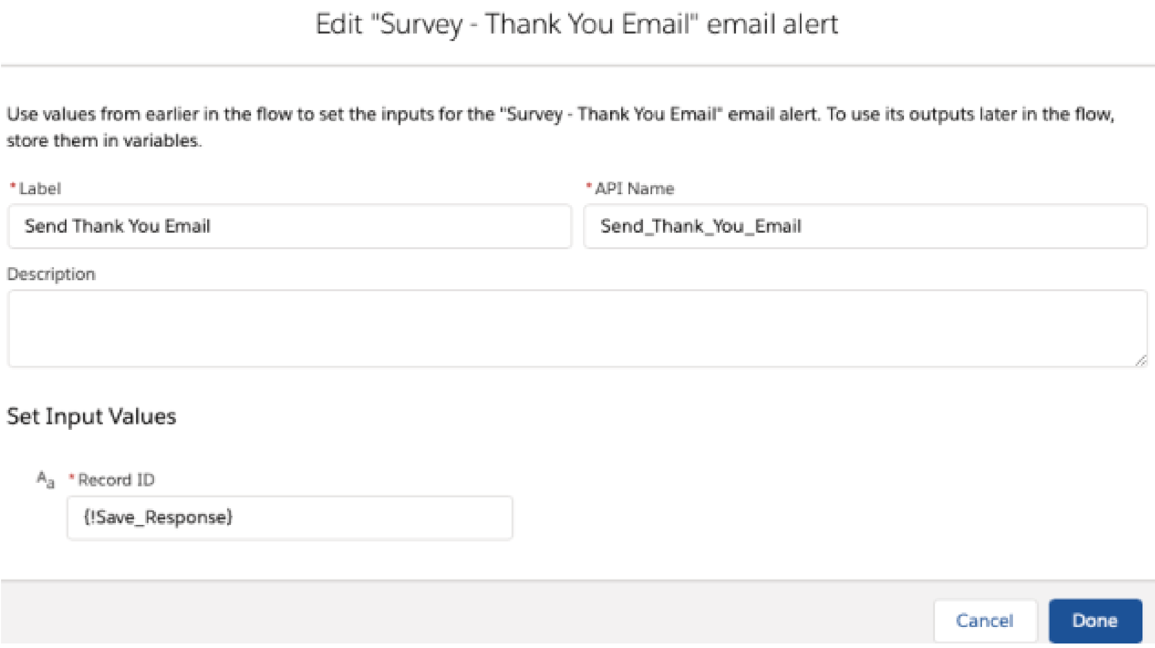


Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

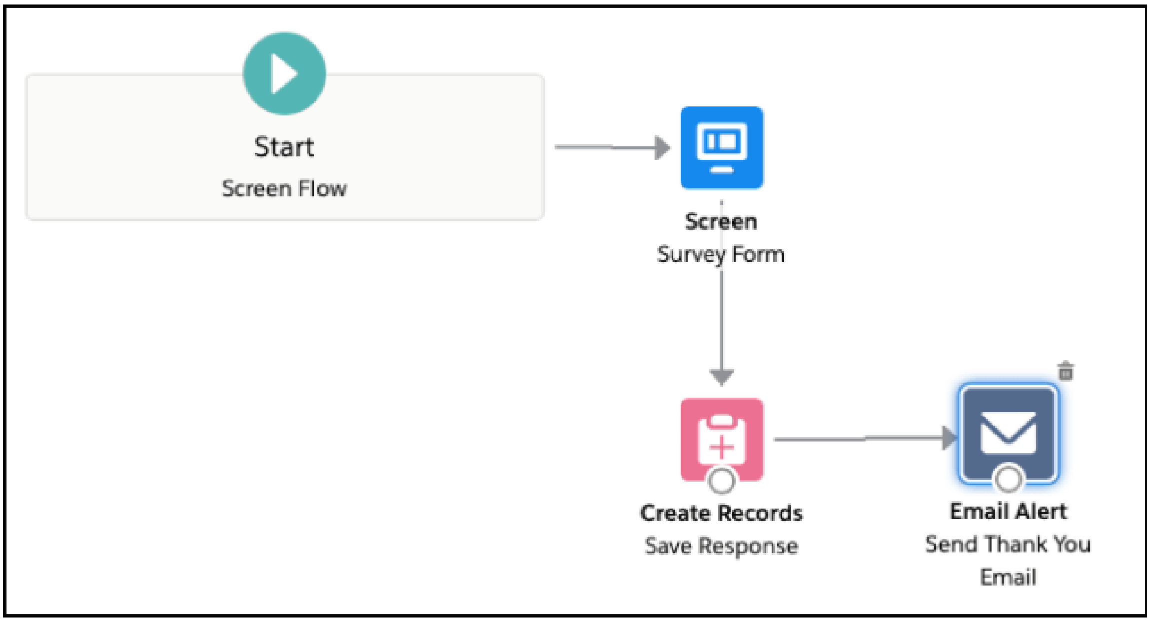
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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

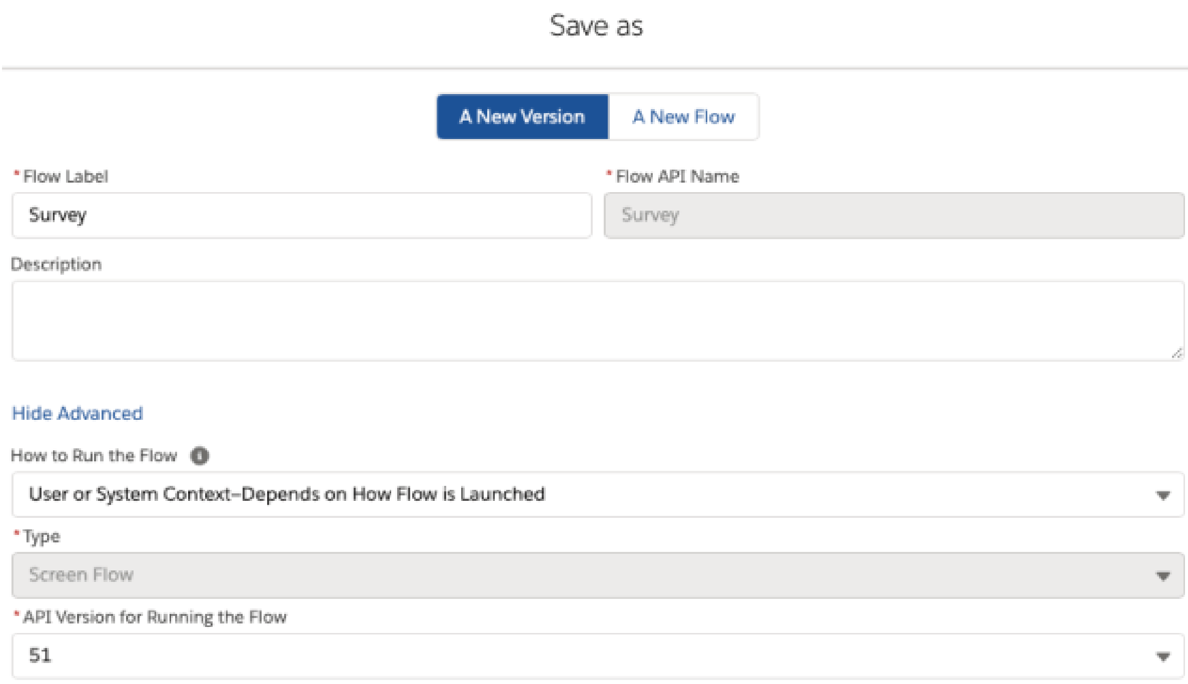
4. Clicks on the **Survey – Thank You Email** email alert.
5. Click **Done**.



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



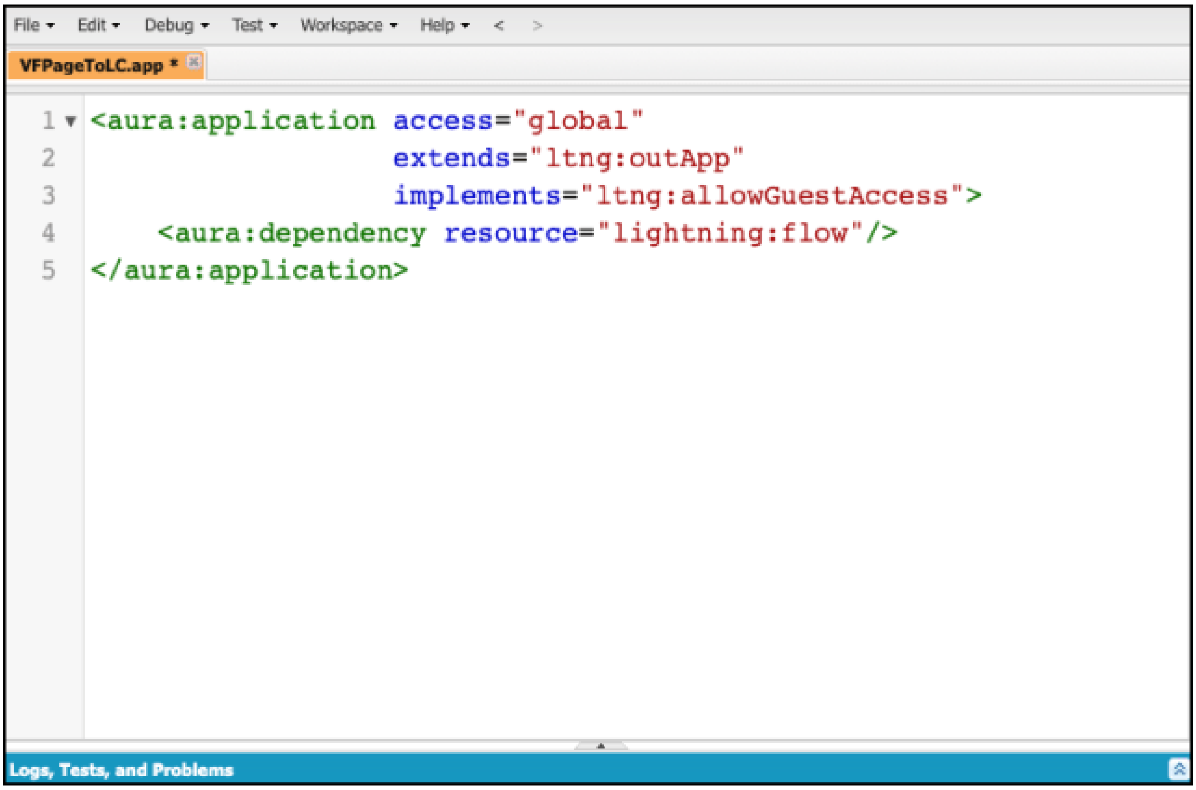
1. Click **Save**.
2. Enter **Flow Label** the **API Name** will auto-populate.
3. Click **Show Advanced**.
4. **How to Run the Flow**: **User or System Context—Depends on How Flow is Launched**
5. **Type**: **Screen Flow**
6. **API Version for Running the Flow**: **51**
7. **Interview Label**: **Survey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



Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a Visualforce Page

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

1. Click **Setup | Developer Console**
2. Navigate to **File | New | Lightning Application**
3. Enter a **Name** (**VFPageToLC**) field, make sure to select the **Lightning Out Dependency App** checkbox.
4. Click **Submit.**
5. Copy code from **GitHub** and paste it into your Lightning Application.
6. **Save** your code.

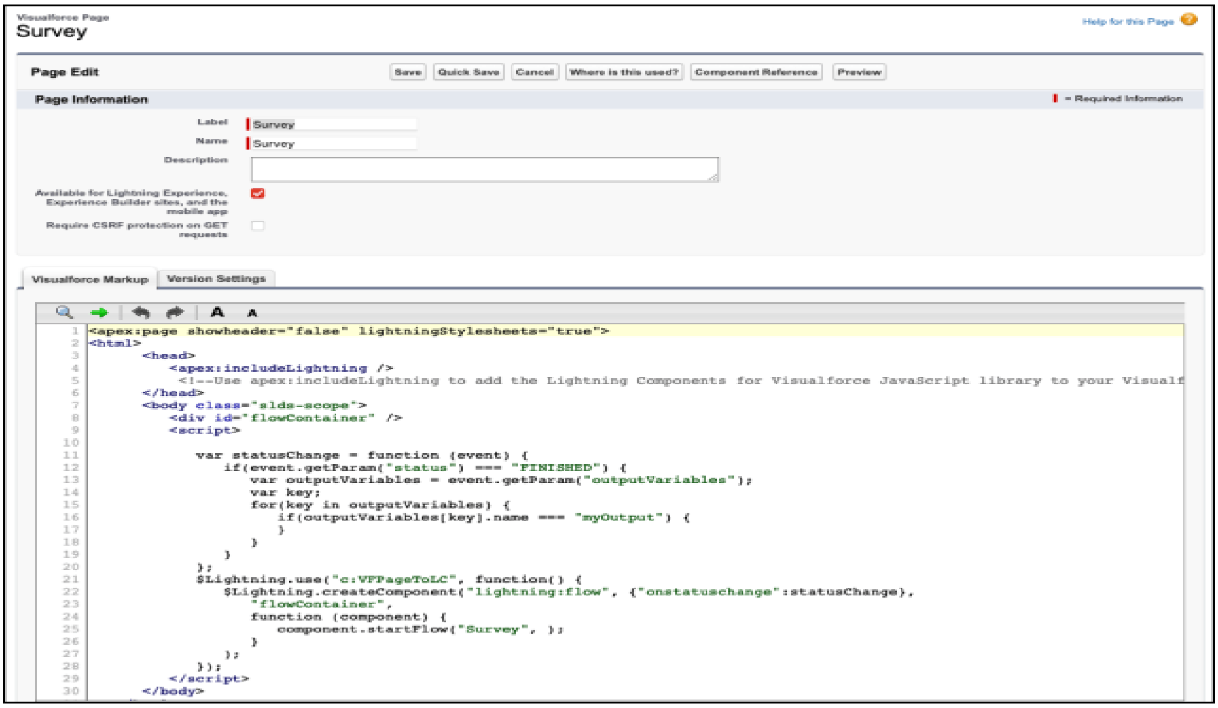


Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

Add the Lightning Components for Visualforce JavaScript library to your Visualforce page using the **<apex:includeLightning/>** component. In the Visualforce page, reference the dependency app. Then write a JavaScript function that creates the component on the page using **$Lightning.createComponent()**

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

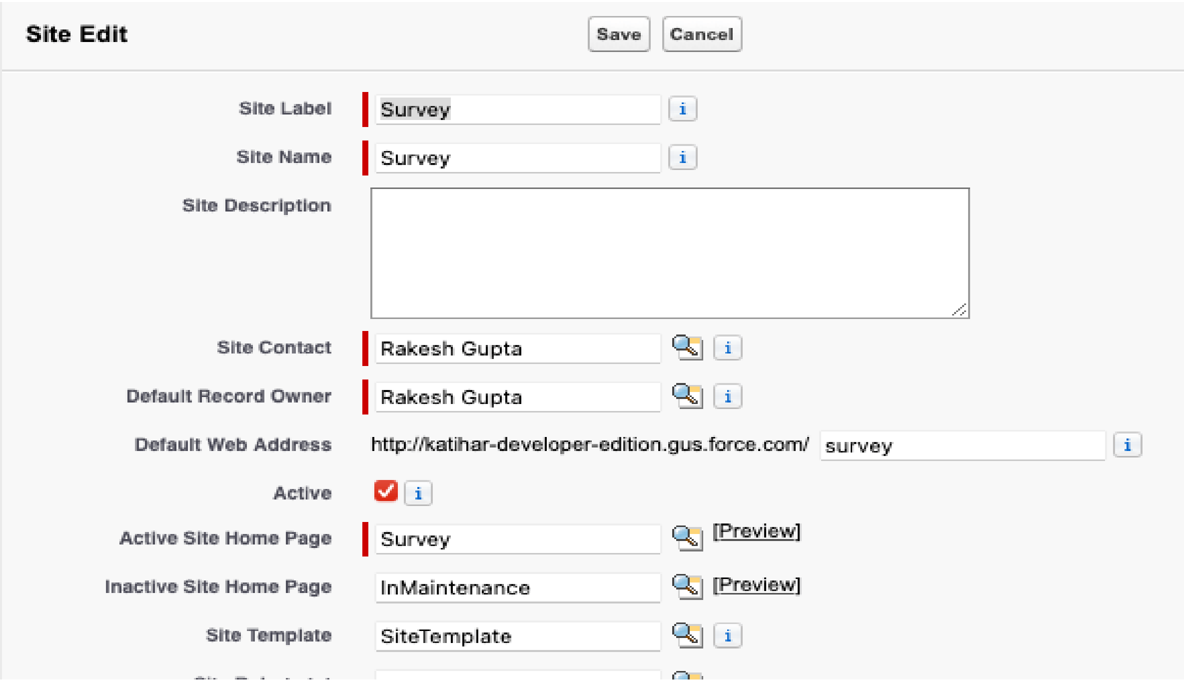


Step 7: Create a Force.com Site to Open Your Flow for Unauthenticated Access

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

1. Click **Setup**.

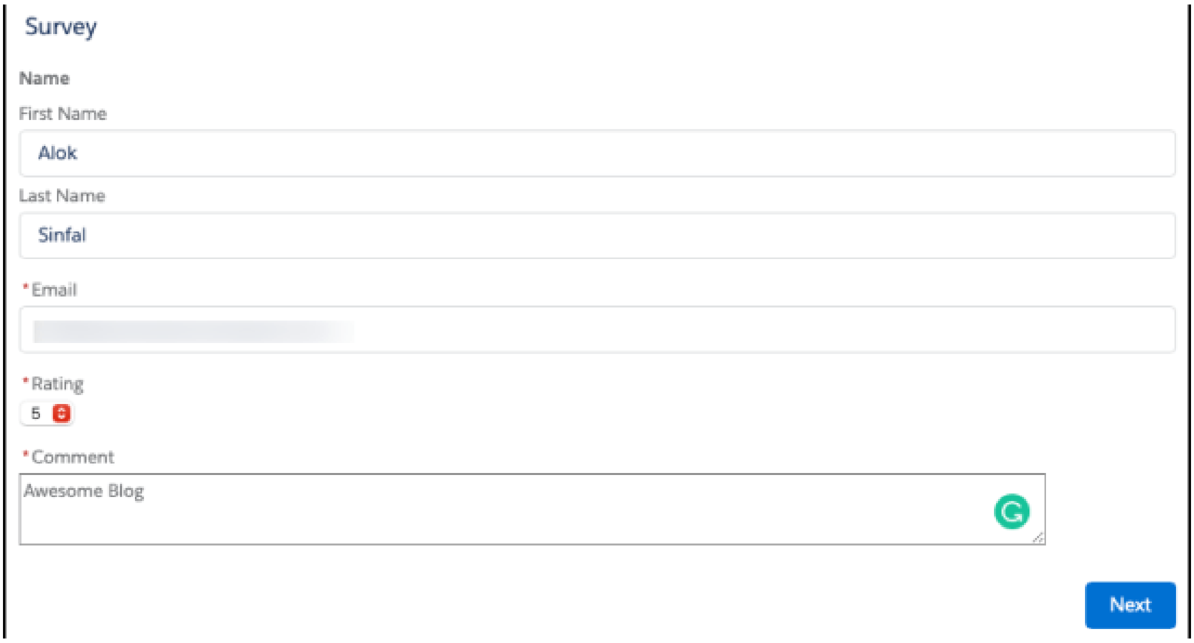
2. In the Quick Find box, type **Sites**.
3. Clicks on the **New** button.
4. Fill the details as per the screenshot below:
5. Click **Save.**



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:



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