

Naan Mudhalvan
Salesforce Developer(Course)
Assignment no 1

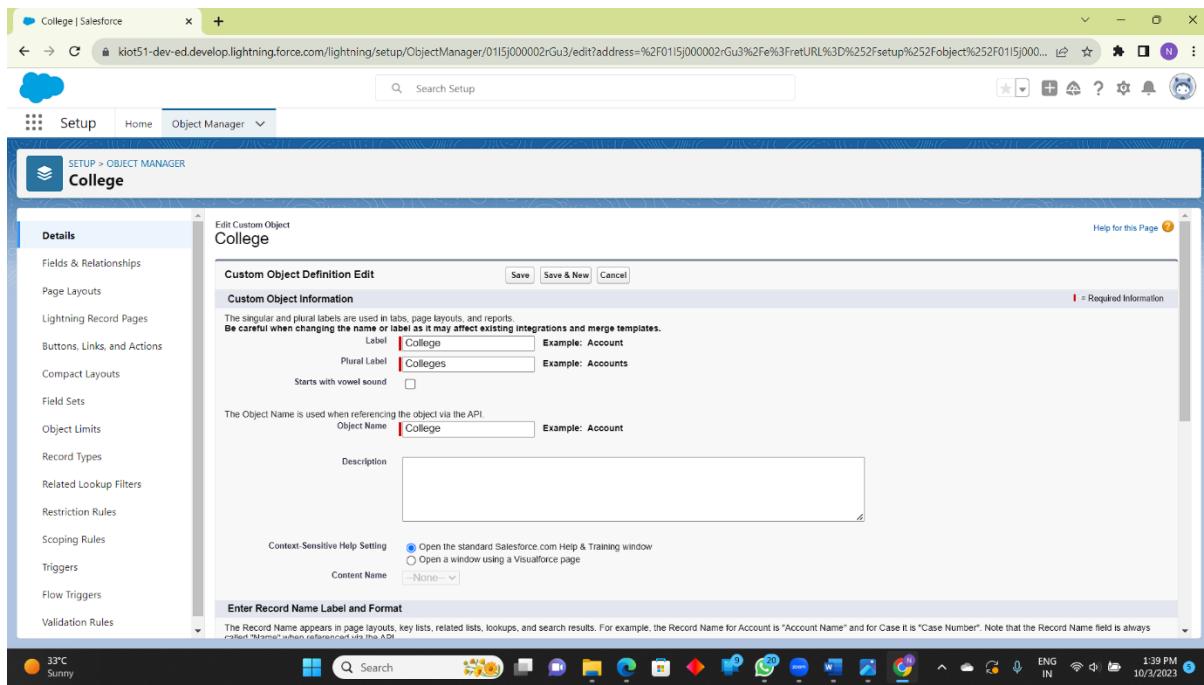
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Year & Dep : 4th year & CSE
Batch : 2024
Zone no : Zone 8

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

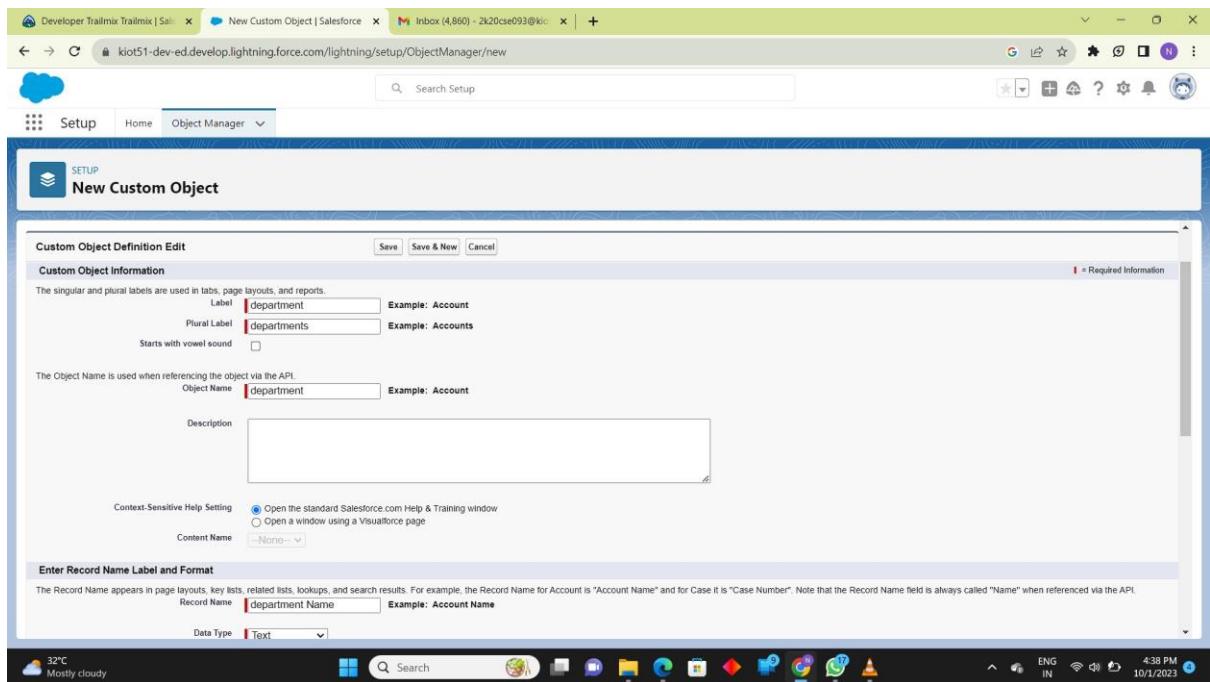
Solution:

Step 1: Create Custom Objects

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



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



Step 2: Create a Master-Detail Relationship

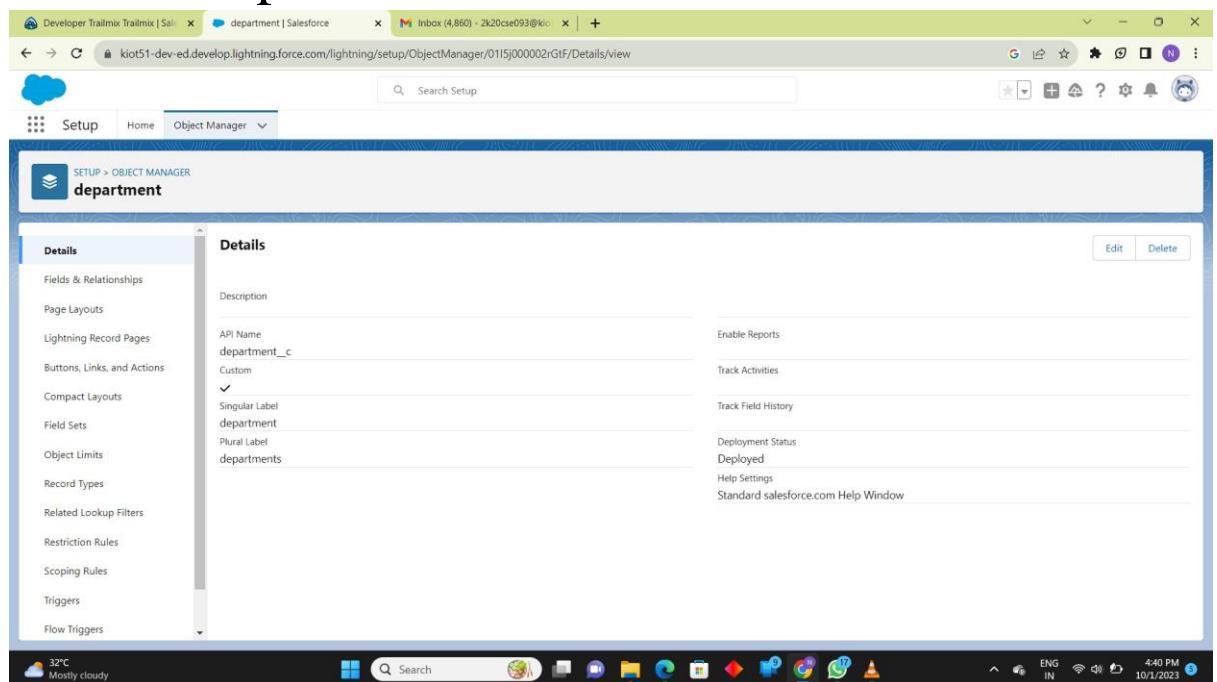
To create a Master-Detail relationship between these two custom objects, follow these steps:

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.



Setup | Home | Object Manager

SETUP > OBJECT MANAGER CDepartment

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

New Custom Field

Step 1. Choose the field type

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

Data Type

None Selected Select one of the data types below.

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

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

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

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
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 defined on the master object.
- The ownership and sharing of detail records are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

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.

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

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

Help for this Page

Step 1
Next Cancel

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
Validation Rules

New Relationship

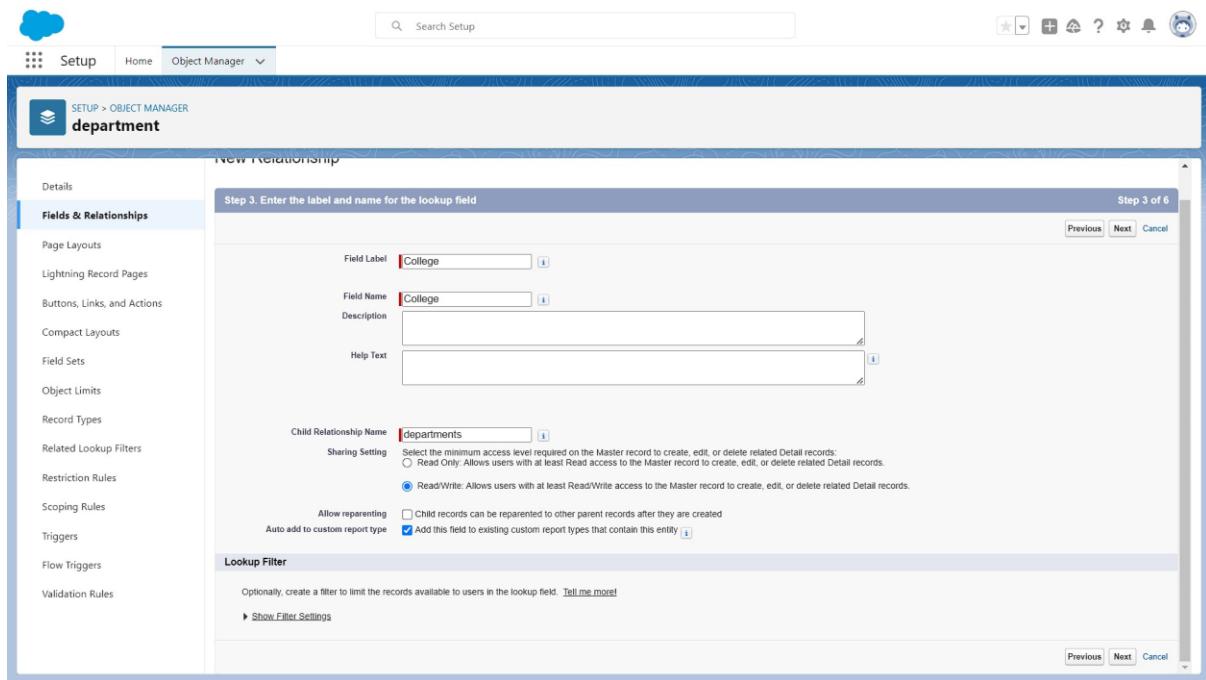
Step 2. Choose the related object

Select the other object to which this object is related.

Related To College

Help for this Page

Step 2 of 6
Previous Next Cancel



Step 3: Create the Roll-Up Summary Field

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

- 1. Still on the "College_c" settings, go to "Fields & Relationships."**
- 2. Click the "New" button to create a new custom field.**
- 3. Choose "Roll-Up Summary" as the data type.**
- 4. Enter a label for the field, e.g.,**
- 5. Choose "Count" as the Roll-Up Type.**
- 6. Select "Department_c" as the object to roll up information from.**

- 7.Specify the filter criteria if you want to filter the related records.**
- 8.Configure other settings as needed and click "Next."**
- 9.Specify the field-level security and add it to relevant page layouts.**
- 10. Click "Next" and "Save" to create the Roll-Up Summary Field.**

SETUP > OBJECT MANAGER

department

Fields & Relationships

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

SETUP

User Interface

Rename **Tabs and Labels**

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.

Help for this Page

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Count of sales by processor	Box	
Edit Del	Details	Box	

Web Tabs

New What Is This?

No Web Tabs have been defined.

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined.

Lightning Component Tabs

New What Is This?

No Lightning component tabs have been defined.

Lightning Page Tabs

New What Is This?

No Lightning Page Tabs have been defined.

<https://kiot51-dev-ed.lightning.force.com/one/one.app#/setup/CustomTabs/home>

Setup > OBJECT MANAGER College

New Custom Field

Step 1. Choose the field type

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

Data Type

Roll-up Summary

Select one of the data types below.

- None Selected
- Auto Number
- Formula
- Roll-up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date

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.

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

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Step 1 **Next** **Cancel**

Setup > OBJECT MANAGER College

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**

Setup > Object Manager College

New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object: College
Summarized Object: departments

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

Setup > Object Manager College

New Custom Field

Step 4. Establish field-level security Step 4 of 5

Field Label	Total count	Field Name	Total_count	Description
Field Label	Total count	Field Name	Total_count	Description
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Force.com - Free User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Gold Partner User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Identity User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Marketing User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

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 ✓ ✓
Analytics Cloud Security User ✓ ✓
Contract Manager ✓ ✓
Cross Org Data Proxy User ✓ ✓
Custom: Marketing Profile ✓ ✓
Custom: Sales Profile ✓ ✓
Custom: Support Profile ✓ ✓
Force.com - App Subscription User ✓ ✓
Force.com - Free User ✓ ✓
Gold Partner User ✓ ✓
Identity User ✓ ✓
Marketing User ✓ ✓

Previous Next Cancel

New Custom Field

Step 5. Add to page layouts

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

Select the page layouts that should include this field. The field will be added as the 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.

Fields & Relationships

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 left sidebar has 'User Interface' expanded, with 'Tabs' selected. The main area is titled 'New Custom Object Tab' and 'Step 1. Enter the Details'. It asks to choose a custom object or create a new one. 'Object' is set to 'College' and 'Tab Style' is 'Jewel'. A note says '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' A dropdown shows 'None'. A 'Description' field is empty. At the bottom are 'Next' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface for creating a new custom object tab, Step 2: Add to Profiles. It asks to choose user profiles for the tab's availability. A radio button is selected for 'Apply one tab visibility to all profiles [Default On]'. A table lists profiles on the left and their visibility settings on the right. All profiles have 'Default On' selected. The table has columns for 'Profile' (listing various user types like Analytics Cloud Integration User, Customer Community Login User, etc.) and 'Tab Visibility' (all showing 'Default On').

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On
Customer Portal Manager Custom	Default On
Customer Portal Manager Standard	Default On

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. The main content area displays sections for 'Custom Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section includes a 'New' button and a 'What Is This?' link. Under 'Custom Object Tabs', there is a table listing three tabs:

Action	Label	Tab Style	Description
Edit Del	Colleges	Jewel	
Edit Del	Count of sales by processor	Box	
Edit Del	Details	Box	

Below each section, there is a note stating 'No [Section] Tabs have been defined'.

The screenshot shows the 'New Custom Object Tab' creation wizard, Step 1 of 3. The title bar says 'New Custom Object Tab' and 'Step 1 of 3'. The main content area is titled 'Step 1. Enter the Details' and contains the following fields:

- 'Select an existing custom object or [create a new custom object now](#).'
 - 'Object': A dropdown menu set to 'department'.
 - 'Tab Style': A dropdown menu set to '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': A dropdown menu set to '-None--'.
- 'Enter a short description.'
 - 'Description': A text input field.

At the bottom right of the form are 'Next' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has 'User Interface' expanded, with 'Rename Tabs and Labels' selected. A search bar at the top right contains 'Search Setup'. The main content area is titled 'SETUP Tabs'. It lists various user roles with their corresponding 'Default On' status. The list includes:

User Role	Default On
External Apps Login User	Default On
External Identity User	Default On
Force.com - App Subscription User	Default On
Force.com - Free User	Default On
Gold Partner User	Default On
High Volume Customer Portal	Default On
High Volume Customer Portal User	Default On
Identity User	Default On
Marketing User	Default On
Minimum Access - Salesforce	Default On
Navjeevan	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Salesforce API Only System Integrations	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

At the bottom right of the content area are 'Previous', 'Next', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page selected. The left sidebar has 'User Interface' expanded, with 'Custom Tabs' selected. A search bar at the top right contains 'Search Setup'. The main content area is titled 'SETUP Tabs'. It starts with a section titled 'Custom Tabs' with a 'Help for this Page' link. Below it, a note says: '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.' The page then lists four categories of tabs:

- Custom Object Tabs**: Shows a table with four rows:

Action	Label	Tab Style	Description
Edit Del	Colleges	Jewel	
Edit Del	Count of sales by processor	Box	
Edit Del	departments	Lightning	
- Web Tabs**: Note: 'No Web Tabs have been defined.'
- Visualforce Tabs**: Note: 'No Visualforce Tabs have been defined.'
- Lightning Component Tabs**: Note: 'No Lightning component tabs have been defined.'
- Lightning Page Tabs**: Note: 'No Lightning Page Tabs have been defined.'

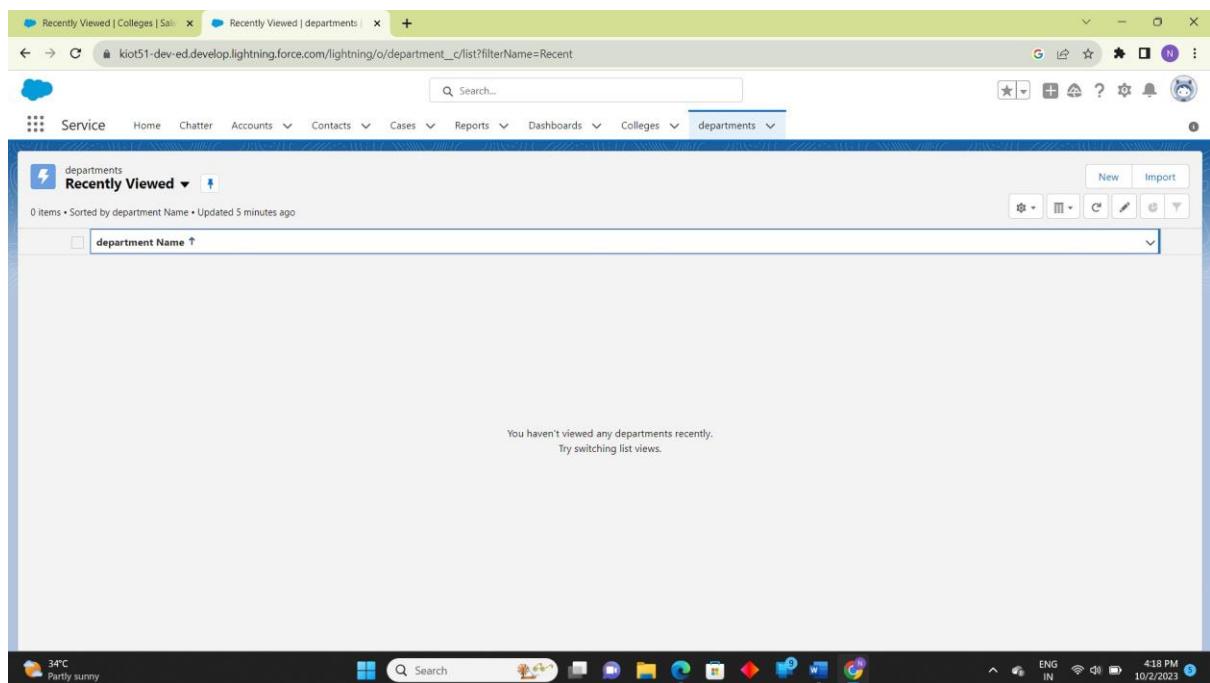
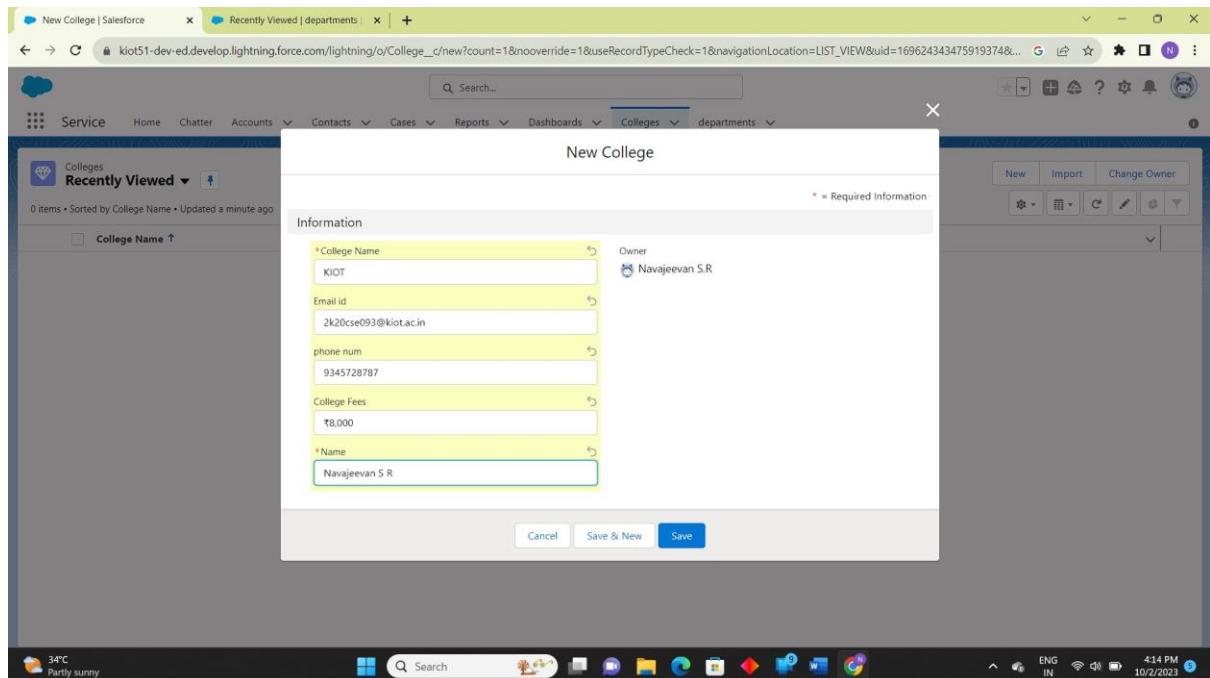
The screenshot shows the Salesforce Setup interface with the 'App Manager' selected in the left sidebar. The main area displays a table titled 'Lightning Experience App Manager' with 21 items. The columns include App Name, Developer Name, Description, Last Modified, Type, and Status. Apps listed include All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, Marketing, Platform, Queue Management, Sales, Sales Console, Salesforce Chatter, Salesforce Scheduler Setup, and Service.

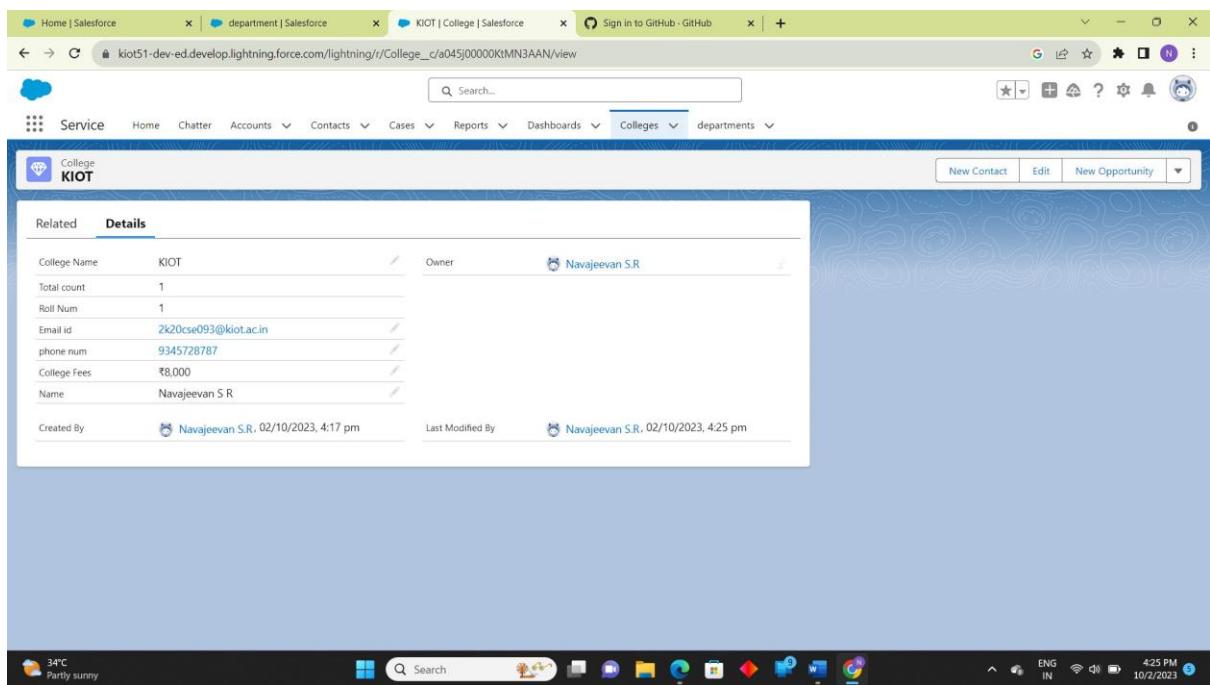
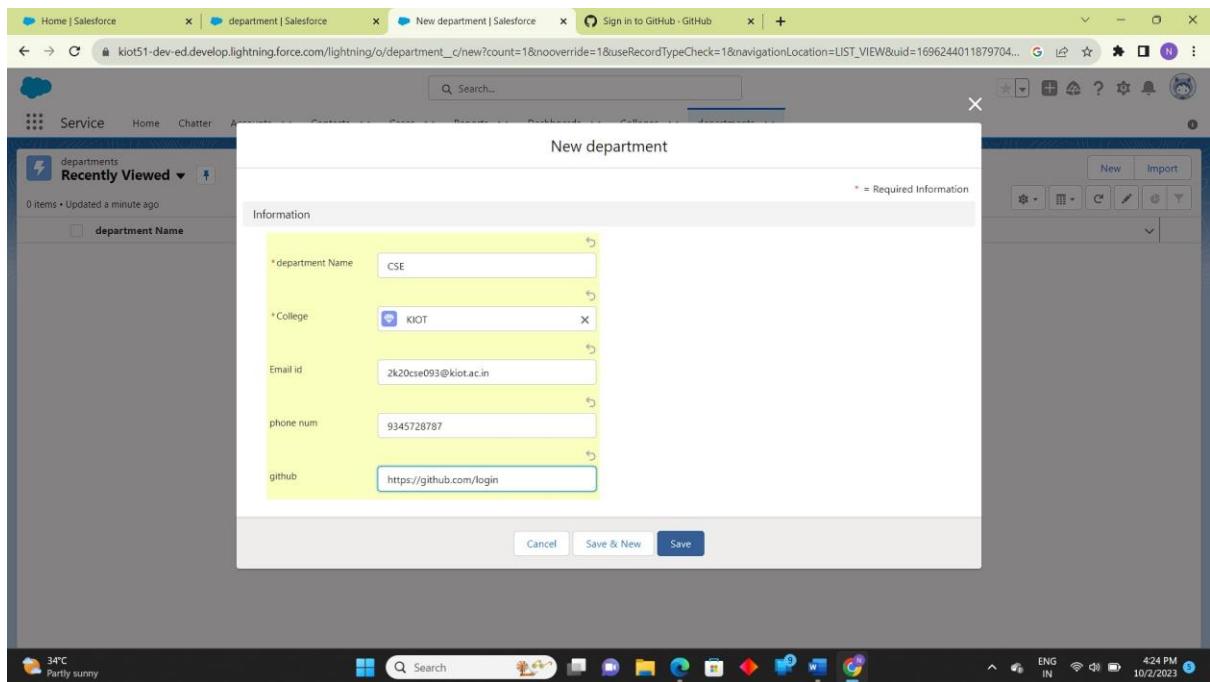
The screenshot shows the 'New Lightning App' configuration page. In the 'App Details & Branding' section, the 'App Name' is set to 'My College', 'Developer Name' is 'My_College', and there is a placeholder 'Description'. The 'Image' field contains a circular logo with a graduation cap and the text 'Beyond Knowledge'. The 'Primary Color Hex Value' is '#007002'. A checkbox 'Use the app's image and color instead of the org's custom theme' is checked. Below this, a table lists installed apps like Queue Management, Sales, and LightningSales. The system tray at the bottom shows the date as 10/1/2023.

Conclusion:

Now, whenever you create or update a record in the "Department__c" related to a "College__c," the "TotalCount__c" field on the "College__c" will automatically update to show the total number of related records.

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





Salesforce | Lightning | Home | CSE | GitHub

kiot51-dev-ed.lightning.force.com/lightning/r/department/_c/a035j00000UnXwfaAF/view

Service Home Chatter Accounts Cases Reports Dashboards Colleges departments

New Contact Edit New Opportunity

Related Details

department Name	CSE
College	KIOT
Email id	2k20cse093@kiot.ac.in
phone num	9345728787
github	https://github.com/login

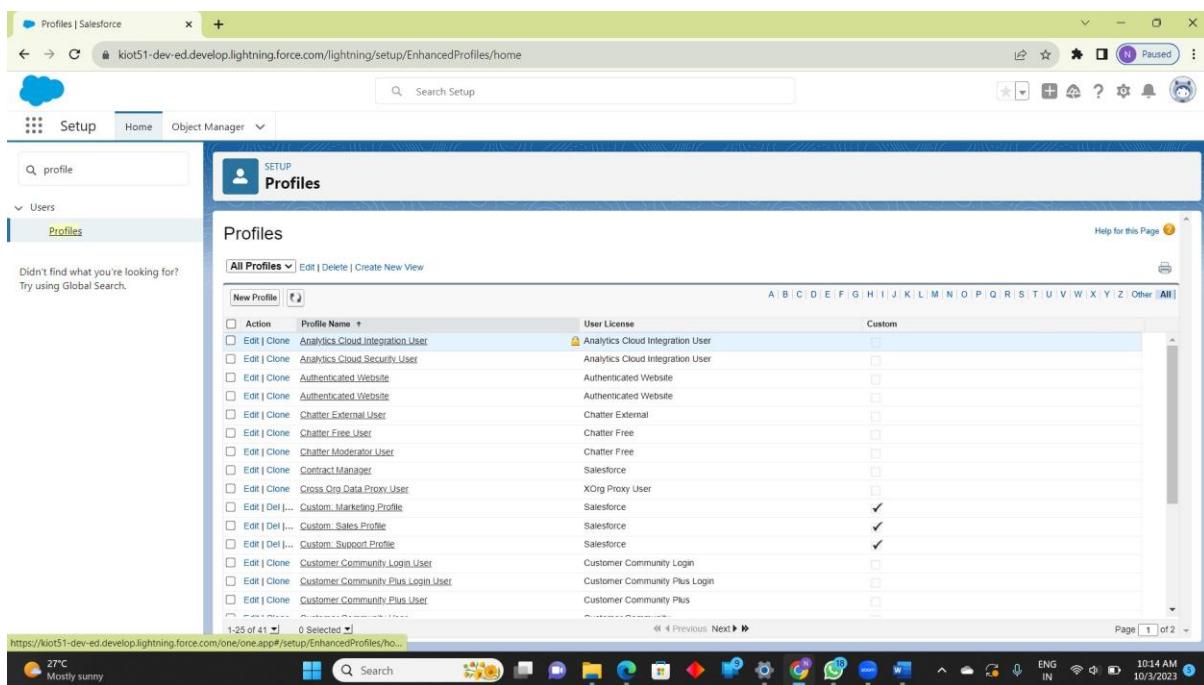
Created By Last Modified By

34°C Partly sunny Search ENG IN 4:25 PM 10/2/2023

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.



The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar has 'Users' selected under 'Profiles'. The main area displays a table titled 'Profiles' with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains checkboxes, many of which are checked for specific profiles like 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External', 'Chatter Free', 'Salesforce', 'XOrg Proxy User', 'Customer Community Login', and 'Customer Community Plus Login'. The bottom of the page shows pagination with '1-25 of 41' and '0 Selected'.

The screenshot shows two windows of the Salesforce Setup interface. The top window displays the 'Profiles' list, and the bottom window shows the 'Clone Profile' dialog.

Profiles List (Top Window):

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

Clone Profile Dialog (Bottom Window):

Enter the name of the new profile:
You must select an existing profile to clone from.

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

Save Cancel

Profiles | Salesforce

Search Setup

Setup Home Object Manager

Users Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from

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

Save Cancel

Help for this Page

27°C Mostly sunny

Profiles | Salesforce

Search Setup

Setup Home Object Manager

Users Profiles

Profile General 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: General Manager	User License: Salesforce Platform	Custom Profile: ✓
Description:	Created By: Navajeewan.S.R. 03/10/2023, 10:16 am	Modified By: Navajeewan.S.R. 03/10/2023, 10:16 am

Page Layouts

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

Operating Hours Layout [View Assignment]
Order Layout [View Assignment]
Order Product Layout [View Assignment]
Payment Layout [View Assignment]
Payment Authorization Layout [View Assignment]
Payment Authorization Adjustment Layout [View Assignment]
Payment Gateway Layout [View Assignment]

Help for this Page

The screenshot displays the Salesforce Lightning Setup interface, specifically the Profiles setup page. The top navigation bar includes links for Home, Object Manager, and a search bar labeled "Search Setup". The main content area is titled "SETUP Profiles" and shows the "General Manager" profile being edited. The profile details include:

- Name:** General Manager
- User License:** Salesforce Platform
- Description:** (Empty)
- Custom Profile:** Checked

Below these details are sections for "Custom App Settings" and "Service Provider Access". In "Custom App Settings", the "My College (My_College)" app is set as the default. In "Service Provider Access", there are tabs for "Tab Settings" and "Standard Tab Settings", with the "Overwrite users' personal tab customizations" checkbox unchecked.

The bottom section of the page contains a large grid of checkboxes for various permissions, grouped under categories like "Communication Subscription Consents", "Communication Subscription Timings", "Contacts", "Contact Point Addresses", "Contact Point Consents", "Contact Point Emails", "Contact Point Phones", "Contact Point Type Consents", "Push Topics", "Sellers", "Streaming Channels", "Surveys", "Survey Invitations", "Survey Responses", and "User External Credentials".

Below the grid is a "Custom Object Permissions" section with tables for "Basic Access" and "Data Administration" for objects like "Colleges", "Count of sales by processor", "departments", "Details", "E mail", and "Survey Results".

The "Session Settings" section at the bottom allows setting session times out after 2 hours of inactivity and requiring login security levels.

The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray indicating it's 10:16 AM on 10/3/2023.

Screenshot of the Salesforce Setup interface showing the Profiles page.

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Profiles

Search: profile

Users

Profiles

Colleges:

Count of sales by processor:

departments:

Details:

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
- Obfuscate 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

Screenshot of the Salesforce Setup interface showing the Profiles and Users sections.

Profiles

Custom Object Permissions

	Bank	customers	Enhancement Requests									
	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 checked="" 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
- Obfuscate secret answer for password resets
- Require a minimum 1 day password lifetime
- Don't immediately expire links in forgot password emails

Users

All Users

This page allows you to create, view, and manage users. On this page, you can:

- Create, view, and manage users.
- Download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty_0045 00000000rvea3 o5zzkou7mu03@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	S.R_Navajeevan	NS_R	2k20cse093@kot.ac.in		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S.R_Navajeevan_11	ns_r	2k20cse093@gmail.com	Director_Direct Sales	<input checked="" type="checkbox"/>	Work.com Only User
<input type="checkbox"/>	S.R_Navajeevan_12	ns_r	2k20cse094@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Navajeevan
<input type="checkbox"/>	User_Integration	integ	integrations@0045 000000rvea3.com		<input checked="" type="checkbox"/>	Analytics_Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@0045 000000rvea3.com		<input checked="" type="checkbox"/>	Analytics_Cloud Security User
<input type="checkbox"/>	V.L_Madeswaran	mv_l	2k20cse095@gmail.com		<input checked="" type="checkbox"/>	Work.com Only User

Users | Salesforce

Search Setup

Setup Home Object Manager

New User

User Edit Save Save & New Cancel

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 Lighter Pages While Scrolling

Help for this Page

Users

Permission Set Groups
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Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations

NIFTY -0.78%

Search

ENG IN 10:24 AM 10/3/2023

Users | Salesforce

Search Setup

Setup Home Object Manager

New User

User Edit Save Save & New Cancel

General Information

First Name: Navajeewan Last Name: 23 Alias: n23 Email: 2k20cse093@kiot.ac.in Username: 2k20cse233@kiot.ac.in Nickname: User169630891039740965 Title: Company: Department: Division:

Role: <None Specified> User License: Salesforce Platform Profile: General 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 Lighter Pages While Scrolling

Help for this Page

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28°C Haze

Search

ENG IN 10:25 AM 10/3/2023

Screenshot of the Salesforce Setup interface showing User Detail for a user named Navajeevan 23.

User Detail

Name	Value	Role	Value
Name	Navajeevan 23	User License	Salesforce Platform
Aliases	n23	Profile	General Manager
Email	2k20cse093@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	2k20cse233@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User15963089103974096521	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address		Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input type="checkbox"/>
Language	English	Data.com User Type	<input type="checkbox"/>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager		Debug Mode	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/>
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator		Disable Salesforce CRM Content Email	<input type="checkbox"/>

User Interface

- Action Link Templates
- Actions & Recommendations

Gmail

Welcome to Salesforce! Verify your account.

Click below to verify your account.

Verify Account

To easily log in later, save this URL:
<https://kiot51-dev-ed.my.salesforce.com>

Username:
2k20cse233@kiot.ac.in

Again, welcome to Salesforce!

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Salesforce.com, inc. The Landmark at One Market, Suite 300, San Francisco, CA, 94105, United States

Screenshot of a web browser showing the "Change Your Password" page in Salesforce.

The URL is https://kiot51-dev-ed.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupId=ChangePassword.

The page displays the following fields:

- Enter a new password for **2k20cse233@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

Buttons: Change Password, Back, Forward, Stop, Refresh, Home, Help, Favorites, Minimize, Maximize, Close.

Page footer: © 2023 Salesforce, Inc. All rights reserved.

Screenshot of a web browser showing the "Recently Viewed" list in Salesforce.

The URL is https://kiot51-dev-ed.develop.lightning.force.com/lightning/o/College__c/list?filterName=Recent.

The list is titled **Recently Viewed** and shows 0 items. Updated a few seconds ago.

Columns: College Name.

Actions: New, Change Owner, Edit, Delete, Filter, Sort, Refresh.

Page footer: © 2023 Salesforce, Inc. All rights reserved.

The screenshot shows a Salesforce Lightning interface for creating a new college record. The page title is "New College". The "Information" section contains the following fields:

- *College Name: Kiot
- Email id: Navajeevan@zohomail.in
- phone num: +919345728787
- College Fees: ₹85,000
- *Name: Navajeevan S R

The "Owner" field is set to Navajeevan 23. At the bottom of the form are "Cancel", "Save & New", and "Save" buttons.

The screenshot shows the details of the newly created college record. The page title is "Kiot | College". The "Details" tab is selected. The record information is as follows:

- College Name: Kiot
- Owner: Navajeevan 23
- Total count: 0
- Roll Num: 0
- Email id: navajeevan@zohomail.in
- phone num: +919345728787
- College Fees: ₹85,000
- Name: Nava S R

Below the details, it shows "Created By" and "Last Modified By" both listed as Navajeevan 23, 03/10/2023, 10:36 am. At the top right of the page are "New Contact", "Edit", and "Delete" buttons.

The image displays two screenshots of the Salesforce Setup interface, one above the other.

Top Screenshot: The user is viewing the "Profiles" page under the "Setup" menu. The sidebar shows navigation options like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, etc. Under "ADMINISTRATION", "Profiles" is selected. The main content area lists profiles with columns for Action, Profile Name, User License, and Custom. One profile, "Standard Platform User", is highlighted. The URL in the browser is <https://kiot51-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home>.

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

Bottom Screenshot: The user is in the "Clone Profile" dialog. It prompts the user to enter the name of the new profile. A message at the top right says "Error: Invalid Data. Review all error messages below to correct your data." Below this, it says "You must select an existing profile to clone from." It shows the "Existing Profile" set to "Standard Platform User", "User License" as "Salesforce Platform", and "Profile Name" set to "Project Manager". A red error message below states "Error: The profile name is already in use." At the bottom are "Save" and "Cancel" buttons. The URL in the browser is [https://kiot51-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_u%2Fperms%2Fu%2Fprofile%2FProfileClone%2fe%3Fd%3D00e5j000004oDj%26setu...](https://kiot51-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_u%2Fperms%2Fu%2Fprofile%2FProfileClone%2Fe%3Fd%3D00e5j000004oDj%26setu...).

Verify your identity in Salesforce | Profiles | Salesforce | kiot51-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000bW0R%3Fsetupid%3DEnhancedProfiles

Setup Home Object Manager

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

ADMINISTRATION
Users
Permission Set Groups
Permission Sets
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Public Groups
Queues
Roles
User Management Settings
Users

> Data
> Email

PLATFORM TOOLS
> Subscription Management

Project Manager

Profile Detail

Name	Project Manager	Custom Profile	
User License	Salesforce Platform		
Description			
Created By	Navajeeyan S.R 03/10/2023, 10:39 am	Modified By	Navajeeyan S.R 03/10/2023, 10:39 am

Page Layouts

Standard Object Layouts	Global	Global Layout	Operating Hours	Operating Hours Layout
Email Application	Not Assigned	[View Assignment]	Order	[View Assignment]
Home Page Layout	Home Page Default	[View Assignment]	Order Product	[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]

Help for this Page

Verify your identity in Salesforce | Profiles | Salesforce | kiot51-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000bW0R%3Fsetupid%3DEnhancedProfiles

Setup Home Object Manager

Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
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> Email

PLATFORM TOOLS
> Subscription Management

Project Manager

Profile Edit

Save Save & New Cancel

Name	Project Manager	Custom Profile
User License	Salesforce Platform	
Description		

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

ENG IN 10:39 AM 10/3/2023

Screenshot of the Salesforce Setup interface showing the Profiles and Users sections.

Profiles

The Profiles section displays Custom Object Permissions for various objects like Colleges, Count of sales by processor, and departments. It also shows Session Settings (Session Times Out After: 2 hours of inactivity) and Password Policies (User passwords expire in: 90 days, etc.).

Object	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Colleges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Count of sales by processor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Users

The Users section shows the "New User" creation form. The General Information tab is active, displaying fields for 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), and Active status (checked). Other tabs include 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 (checked), and Debug Mode.

Profiles | Salesforce

Verify your identity in Salesforce

Setup Home Object Manager

Search Setup

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage Optimizer

ADMINISTRATION

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

DATA

EMAIL

PLATFORM TOOLS

Subscription Management

28°C Haze

28°C Haze

Verify your identity in Salesforce

Users | Salesforce

Setup Home Object Manager

Search Setup

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings**
- Users
- Feature Settings
- Data.com
- Prospector Users
- Service
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- Actions & Recommendations

Help for this Page

New User

User Edit

Save Save & New Cancel

General Information

First Name Required Information

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 Johnson Pages While Scrolling

28°C Haze

28°C Haze

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

Left Sidebar (User Management Settings - Users):

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

Central Content Area (User Edit Screen):

User Edit Navajeevan 11 S.R

General Information

First Name	Navajeevan 11
Last Name	S.R
Alias	ns.r
Email	2k20cse093@gmail.com
Username	2k20cse093@gmail.com
Nickname	User169614685792499291
Title	
Company	
Department	
Division	

Role: Director, Direct Sales
User License: Salesforce Platform
Profile: Project 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:

Data.com Monthly Addition Limit: 300
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:

Bottom Buttons: Save, Save & New, Cancel

System Status Bar: 32°C Feels hotter, 12:39 PM 10/3/2023

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

Left Sidebar (User Management Settings - Users):

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

Central Content Area (User Edit Screen):

User Edit Navajeevan 11 S.R

General Information

First Name	Navajeevan 11
Last Name	S.R
Alias	ns.r
Email	2k20cse093@gmail.com
Username	2k20cse093@gmail.com
Nickname	User169614685792499291
Title	
Company	
Department	
Division	

Role: Director, Direct Sales
User License: Salesforce Platform
Profile: Project 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:

Data.com Monthly Addition Limit: 300
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:

Bottom Buttons: Save, Save & New, Cancel

System Status Bar: 32°C Feels hotter, 12:39 PM 10/3/2023

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

Left Sidebar (User Management Settings - Users):

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

Central Content Area (User Edit Screen):

User Edit Navajeevan 11 S.R

General Information

First Name	Navajeevan 11
Last Name	S.R
Alias	ns.r
Email	2k20cse093@gmail.com
Username	2k20cse093@gmail.com
Nickname	User169614685792499291
Title	
Company	
Department	
Division	

Role: Director, Direct Sales
User License: Salesforce Platform
Profile: Project 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:

Data.com Monthly Addition Limit: 300
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:

Bottom Buttons: Save, Save & New, Cancel

System Status Bar: 28°C Haze, 10:42 AM 10/3/2023

Verify your identity in Salesforce

Users | Salesforce

Setup Home Object Manager

Search Setup

Mailing Address

Street: Komuru gounder kadu Jarkoodal patti

City: Rasipuram

Zip/Postal Code: 636202

State/Province: Tamilnadu

Country: India

Single Sign On Information

Federation ID: [empty]

Locale Settings

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

Locale: English (India)

Language: English

Approver Settings

Delegated Approver: [empty]

Manager: [empty]

Receive Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately: checked

User Navajeewan 11 S.R.

User ProfileHelp for this Page

User Detail

Name: Navajeewan 11 S R

Alias: ns r

Email: 2k20cse093@gmail.com (verified)

Username: 2k20cse093@gmail.com

Nickname: User16961468579249929173

Title: [empty]

Company: [empty]

Department: [empty]

Division: [empty]

Address: [empty]

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

Locale: English (India)

Language: English

Delegated Approver: [empty]

Manager: [empty]

Receive Approval Request Emails: Only if I am an approver

Sharing: [empty]

Reset Password: [empty]

Freeze: [empty]

Role: Director, Direct Sales

User License: Salesforce Platform, Project Manager

Profile: Marketing User, Offline User, Knowledge User

Active: checked

Marketing User, Service Cloud User, Site.com Contributor User, Site.com Publisher User

WDC User, Mobile Push Registrations, Data.com User Type: View

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

Load Lightning Pages While Scrolling: checked

Setup Home Object Manager

Search Setup

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Verify your identity in Salesforce

Home | Salesforce

Users | Salesforce

Setup Home Object Manager

Search Setup

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Finish resetting your Salesforce | Change Your Password | Salesforce

kiot51-dev-ed.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupid=ChangePassword

Change Your Password

Enter a new password for 2k20cse094@gmail.com.
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, 12:16 pm.



Finish resetting your Salesforce | Recently Viewed | Contacts | Sales

kiot51-dev-ed.my.salesforce.com/lightning/o/Contact/list?filterName=Recent

Recently Viewed

My College * Colleges * Recently Viewed | Contacts

0 items • Updated a few seconds ago

Name	Account Name	Account Site	Phone	Email	Contact Owner Alias
You haven't viewed any Contacts recently. Try switching list views.					



The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar has a tree view with 'Permission Sets' selected under 'Users'. The main area displays a table of permission sets with columns for Action, Permission Set Label, Description, and License. The table includes rows for various roles like Buyer, CRM User, Commerce Admin, etc., with detailed descriptions and license information.

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

Step 2:

Permission Sets:

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

Object-Level Security:

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

"Read" to ensure that both User A and User B can view Account records.

Record-Level Security:

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

- Create a sharing rule that shares Account records owned by User A with User A and records owned by User B with user B.
- For the sharing rule criteria, specify that records owned by User A are shared with user A, and records owned by User B are shared with User B.

Ownership:

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

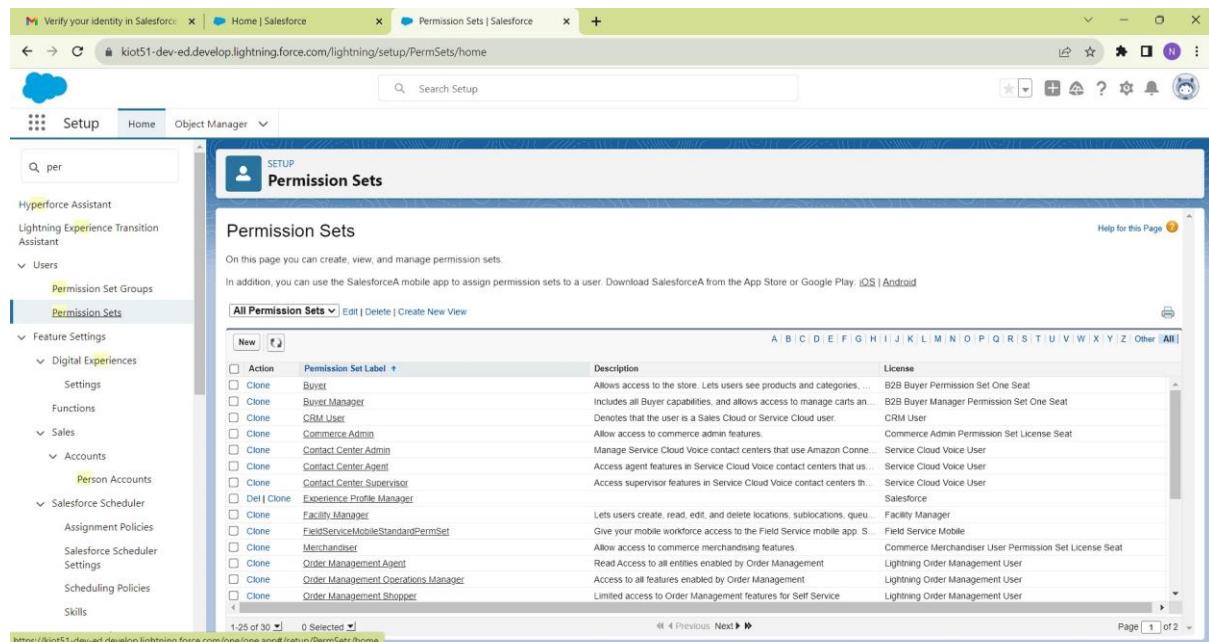
Organization-Wide Defaults:

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

Testing:

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

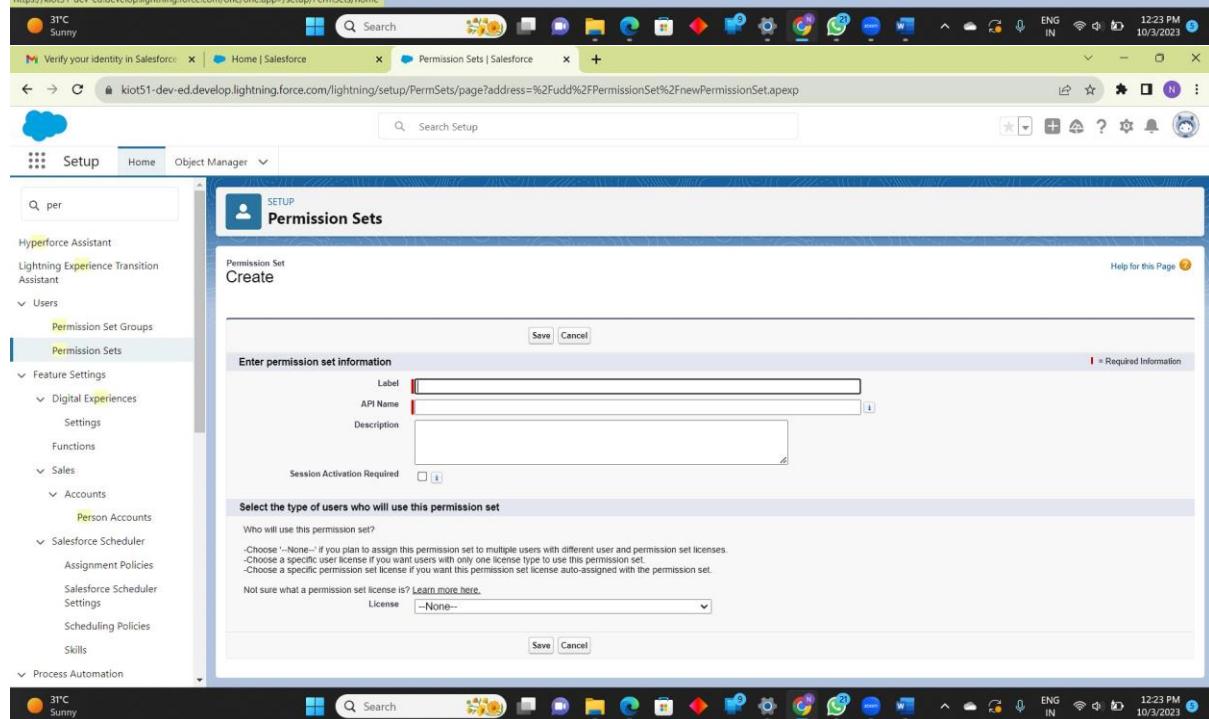
access each other's records.



The screenshot shows the 'Permission Sets' page in the Salesforce Setup interface. The left sidebar navigation includes 'Hyperforce Assistant', 'Lightning Experience Transition Assistant', 'Users' (selected), 'Permission Set Groups' (selected), and 'Permission Sets'. Under 'Permission Sets', there are sections for 'Feature Settings' (Digital Experiences, Functions, Sales, Accounts, Salesforce Scheduler, Assignment Policies, Scheduling Policies, Skills), 'Permission Set Groups' (Person Accounts), and 'Permission Sets' (selected). The main content area displays a table of existing permission sets, with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. A search bar at the top right says 'Search Setup'.

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	Allows 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...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Del Clone		Salesforce
<input type="checkbox"/>	Experience Profile Manager		
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, queu...	Facility Manager
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	Merchandiser	Allow access to commerce merchandising features	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper	Limited access to Order Management features for Self Service	Lightning Order Management User

1-25 of 30 | 0 Selected | Help for this Page 



The screenshot shows the 'Create' page for a new permission set. The left sidebar navigation is identical to the previous screenshot. The main content area has a title 'Permission Set Create' and a 'Save' button. It contains two sections: 'Enter permission set information' and 'Select the type of users who will use this permission set'. In 'Enter permission set information', fields include 'Label' (text input), 'API Name' (text input), and 'Description' (text area). In 'Select the type of users who will use this permission set', it asks 'Who will use this permission set?'. Options include '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.', and 'Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.' Below this is a note 'Not sure what a permission set license is? [Learn more here.](#)' and a 'License' dropdown menu with 'None' selected. A 'Save' button is at the bottom.

Verify your identity in Salesforce | **Home | Salesforce** | **Permission Sets | Salesforce**

Search Setup

Setup Home Object Manager

Permission Sets

Create

Enter permission set information

Label: General manager
API Name: General_manager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

- 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-

General manager

Permission Set Overview

Description	API Name	Namespace Prefix	Created By
Licenses	General_manager		Navajeevan S.R. 03/10/2023, 12:25 pm
Session Activation Required			
Last Modified By			

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.

The screenshot shows the Salesforce 'Permission Sets' page under the 'SETUP' tab. The left sidebar is collapsed, and the main content area displays the 'General manager' settings for various objects. The objects listed include Accounts, AI Insight Reasons, AI Record Insights, Alternative Payment Methods, API Anomaly Event Stores, API Analytics Query Requests, Application Usage Assignments, Appointment Categories, Appointment Invitations, Appointment Invitees, Appointment Schedule Aggregates, Appointment Schedule Logs, Appointment Topic Time Slots, Asset Actions, Asset Action Sources, Asset Relationships, Assets, and Asset State Periods. Each object has associated 'Object Permissions', 'Total Fields', and 'Tab Settings'. The 'Object Settings' section header is visible above the list.

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	--
API 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	--

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. The main content area displays the 'General manager' permission set. The 'Object Permissions' section lists various permissions for the 'Colleges' object, such as Read, Create, Edit, Delete, View All, and Modify All. The 'Field Permissions' section shows access levels for 'Read Access' and 'Edit Access' for fields like 'College Fees'. The left sidebar includes sections for Hyperforce Assistant, Lightning Experience Transition Assistant, Users, and various system settings.

Permission Set
General manager

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
College Fees	<input type="checkbox"/>	<input type="checkbox"/>

Verify your identity in Salesforce | Home | Salesforce | Permission Sets | Salesforce

kiot51-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000007UxpW%2Fe%3Fs%3DEntityPermissions%26o%3D0115j000002rGu3

Setup Home Object Manager

Search Setup

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler Settings

Scheduling Policies

Skills

31°C Sunny

SEARCH

Video Tutorial | Help for this Page

Permission Set General manager

Find Settings | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings Colleges

Save | Cancel

Tab Settings

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

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
College Fees	<input type="checkbox"/>	<input type="checkbox"/>

Field Name Read Access Edit Access

College Fees

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SEARCH

Verify your identity in Salesforce | Home | Salesforce | Permission Sets | Salesforce

kiot51-dev-ed.lightning.force.com/lightning/setup/PermSets/0PS5j000007UxpW/PermissionSetAssignment/home

Setup Home Object Manager

Search Setup

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler Settings

Scheduling Policies

Skills

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... > SETUP > PERMISSION SET 'GENERAL MANAGER'

General manager

Add Assignment

Current Assignments

No assignments defined.

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Verify your identity in Salesforce | Home | Salesforce | Permission Sets | Salesforce

All Users

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00d5j00000cirvea3.o9zzkqu7mup3@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	integration@00d5j00000cirvea3.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Madheswaran V L	mv l	2k20cse095@gmail.com		<input checked="" type="checkbox"/>	Work.com Only User
Navajeevan 11 S.R	ns.r	2k20cse093@gmail.com	Director, Direct Sales	<input checked="" type="checkbox"/>	Project Manager
Navajeevan 12 S.R	ns.r	2k20cse094@gmail.com		<input checked="" type="checkbox"/>	Project Manager
Navajeevan 23	n23	2k20cse233@kiot.ac.in		<input checked="" type="checkbox"/>	General Manager
Navajeevan S.R	NS.R	2k20cse093@kiot.ac.in		<input checked="" type="checkbox"/>	System Administrator
Security User	sec	insightssecurity@00d5j00000cirvea3.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next

Search Setup

Setup Home Object Manager

Hyperforce Assistant Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler Settings

Scheduling Policies

Skills

Process Automation

31°C Sunny

Verify your identity in Salesforce | Home | Salesforce | Permission Sets | Salesforce

All Users

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00d5j00000cirvea3.o9zzkqu7mup3@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	integration@00d5j00000cirvea3.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Madheswaran V L	mv l	2k20cse095@gmail.com		<input checked="" type="checkbox"/>	Work.com Only User
Navajeevan 11 S.R	ns.r	2k20cse093@gmail.com	Director, Direct Sales	<input checked="" type="checkbox"/>	Project Manager
Navajeevan 12 S.R	ns.r	2k20cse094@gmail.com		<input checked="" type="checkbox"/>	Project Manager
Navajeevan 23	n23	2k20cse233@kiot.ac.in		<input checked="" type="checkbox"/>	General Manager
Navajeevan S.R	NS.R	2k20cse093@kiot.ac.in		<input checked="" type="checkbox"/>	System Administrator
Security User	sec	insightssecurity@00d5j00000cirvea3.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next

Search Setup

Setup Home Object Manager

Hyperforce Assistant Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler Settings

Scheduling Policies

Skills

Process Automation

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Verify your identity in Salesforce | Home | Salesforce | Permission Sets | Salesforce

Setup Home Object Manager Search Setup

No expiration date
Specify the expiration date
1 Day 1 Week 30 Days 60 Days Custom Date Time Zone Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Navajeevan 23	General Manager		✓	Salesforce Platform	Never Expires

Cancel Back Assign

31°C Sunny Verify your identity in Salesforce | Home | Salesforce | Permission Sets | Salesforce

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Navajeevan 23	Salesforce Platform			Success

Done

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The image consists of two vertically stacked screenshots of the Salesforce Setup interface. Both screenshots show the 'Permission Sets' page. In the top screenshot, a user named 'Navajeevan 23' is selected for assignment. The 'Expires On' field is set to 'Never Expires'. In the bottom screenshot, a success message is displayed: '1 assignments were successful.' The 'Assignment Summary' table shows the assigned user, license, and status as 'Success'. The left sidebar contains various setup categories like Users, Feature Settings, and Process Automation.

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:

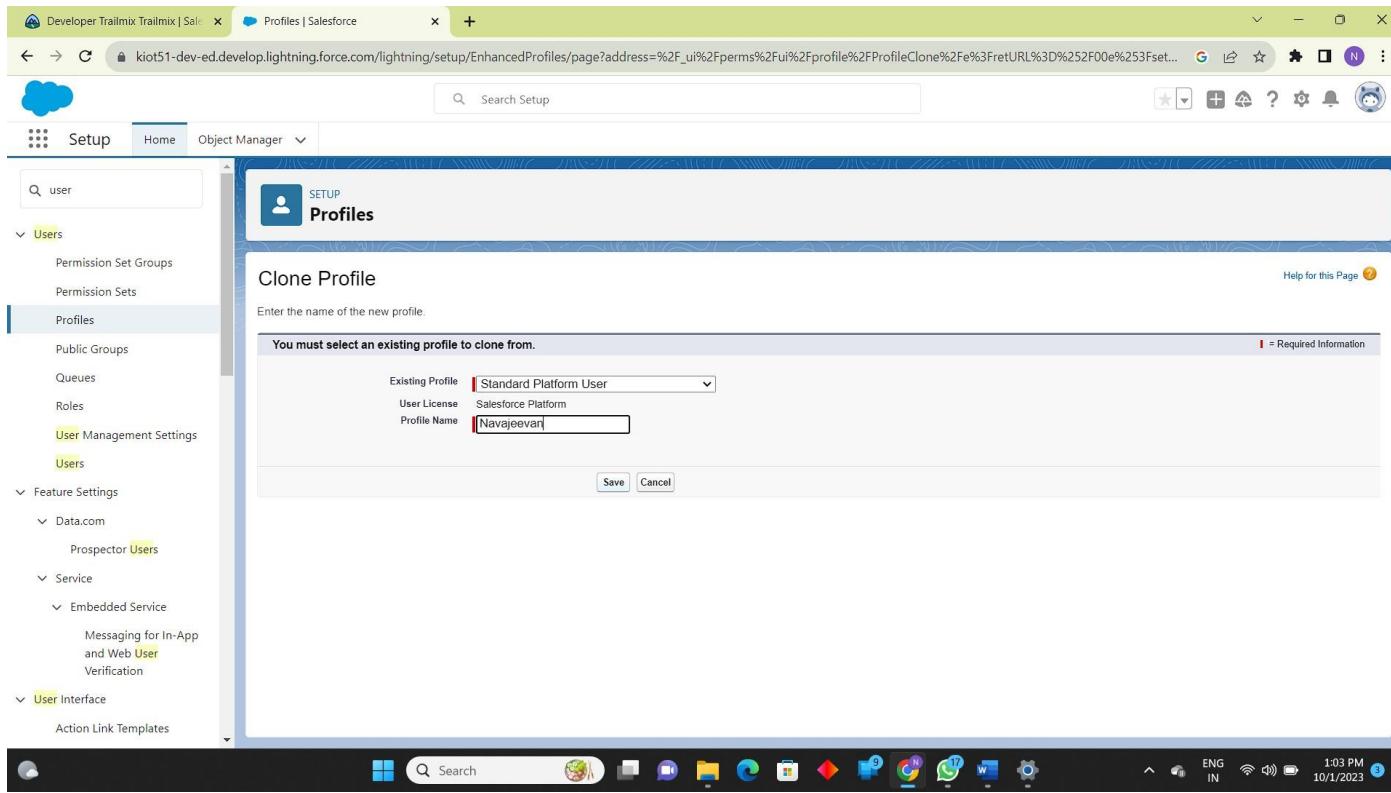
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and sections for 'Users' (Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users), 'Feature Settings' (Data.com, Service, Embedded Service, User Interface), and 'Action Link Templates'. The main content area displays a table titled 'Profiles' with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists various profiles such as 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External', etc. A search bar at the top right says 'Search Setup'.

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.

Developer Trailmix Trailmix | Sales | Profiles | Salesforce

kiot51-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000bVT2%3Fsetupid%3DEnhancedProfiles

Setup Home Object Manager

Search Setup

Cloud icon

Profile Navajeevan

Profile Detail

Name	Navajeevan	Edit	Clone	Delete	View Users
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>			
Description					
Created By	Navajeevan S.R. 01/10/2023, 1:03 pm	Modified By Navajeevan S.R. 01/10/2023, 1:03 pm			

Page Layouts

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

Action Link Templates: https://kiot51-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Developer Trailmix Trailmix | Sales | Profiles | Salesforce

kiot51-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000bVT2%3FretURL%3D%252F00e5j000000bVT2%253Fsetupid%253DEn...

Setup Home Object Manager

Search Setup

Cloud icon

Profile Navajeevan

Background Operations

Business Brands	Communication Subscriptions	Communication Subscription Channel Types	Communication Subscription Consents	Communication Subscription Timings	Contacts	Contact Point Addresses	Contact Point Consents	Contact Point Emails	Documents	Engagement Channel Types	Ideas	Individuals	Locations	Party Consents	Push Topics	Sellers	Streaming Channels	User External Credentials
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Custom Object Permissions

Count of sales by processor	Basic Access					Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All
Details	<input type="checkbox"/>										

Session Settings

E mail
<input type="checkbox"/>

Developer Trailmix Trailmix | Sales | Profiles | Salesforce

kiot51-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000bVT2%2Fe%3FretURL%3D%252F00e5j000000bVT2%253Fsetupid%253DEn...

Setup Home Object Manager

Search Setup

Cloud icon

Setup Profiles

Background Operations

Business Brands	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Documents

Engagement Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
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"/>					
Party Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>					
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

Object	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Count of sales by processor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

Session Settings

Cloud icon

Search

Home Object Manager

Setup Profiles

Background Operations

Business Brands	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Documents

Engagement Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
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"/>					
Party Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>					
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

Object	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Count of sales by processor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Session Settings

Cloud icon

Search

Home Object Manager

Setup Profiles

Developer Trailmix Trailmix | Sales | Profiles | Salesforce

kiot51-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000bVT2%2Fe%3FretURL%3D%252F00e5j000000bVT2%253FappLayout%253D...

Setup Home Object Manager

Search Setup

Cloud icon

Setup Profiles

Profile Edit Navajeevan

Help for this Page

Name: Navajeevan

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations:

Standard Tab Settings: Home Default On

Learning: Default On

Cloud icon

Search

Home Object Manager

Setup Profiles

Profile Edit Navajeevan

Name: Navajeevan

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations:

Standard Tab Settings: Home Default On

Learning: Default On

Cloud icon

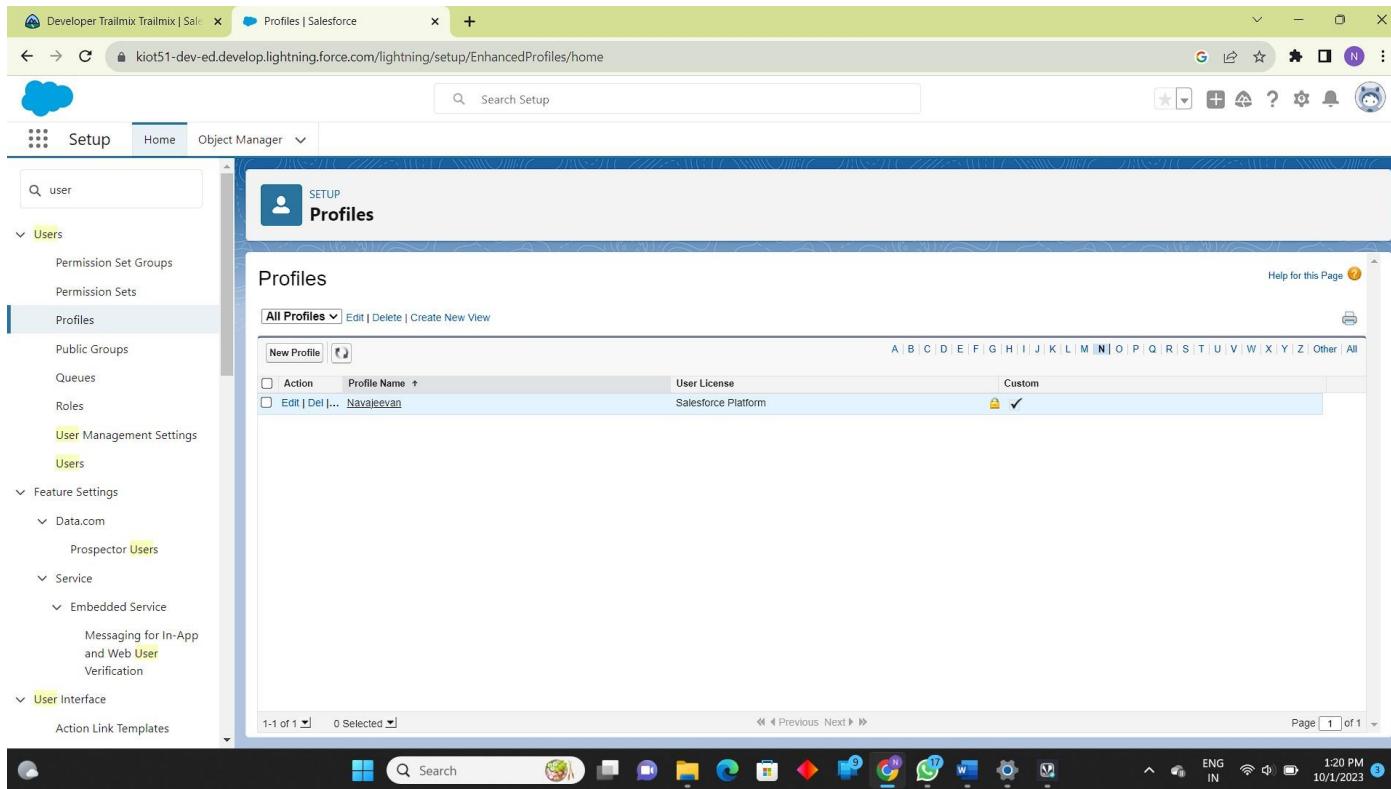
Search

Home Object Manager

Setup Profiles

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

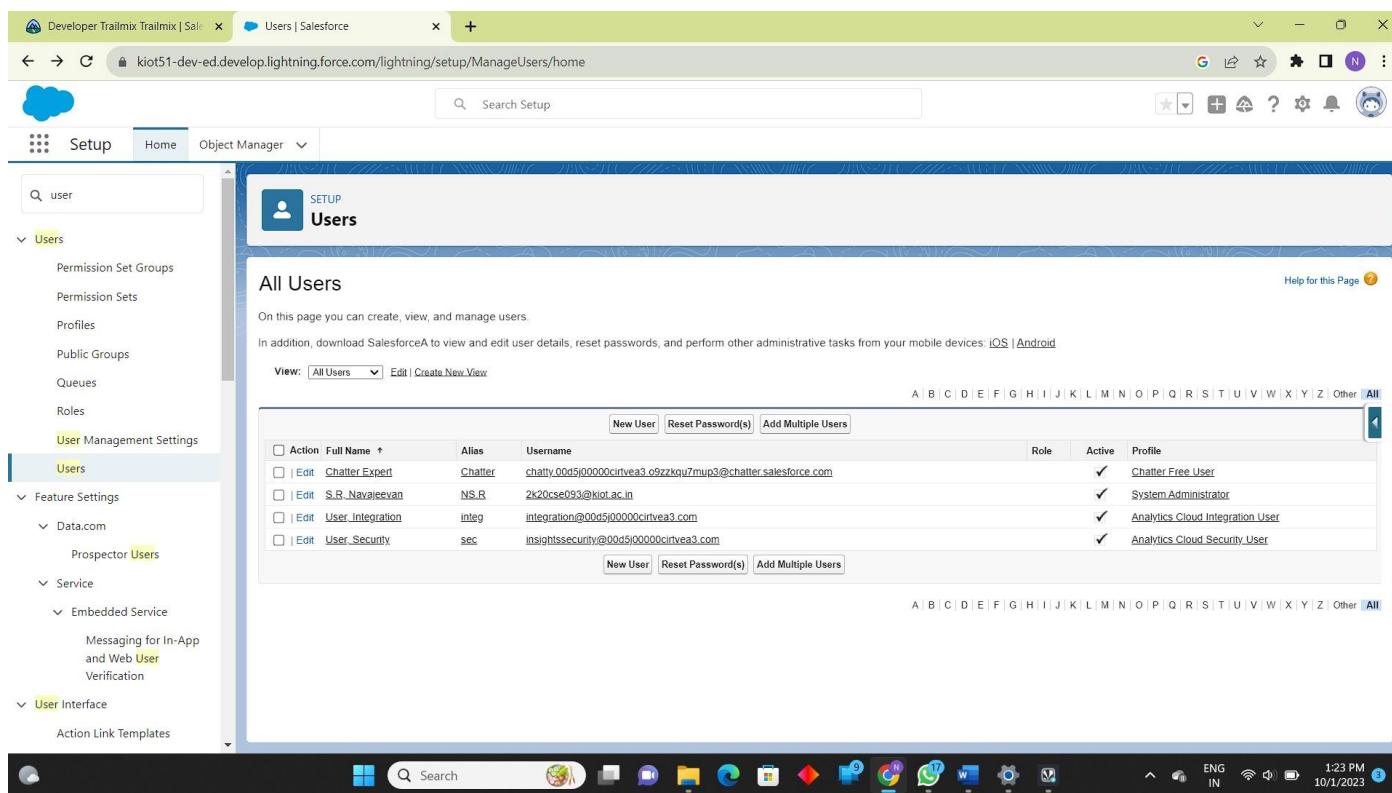


The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is collapsed, and the main area displays the 'Profiles' section under the 'SETUP' tab. A search bar at the top right says 'Search Setup'. Below it, a table lists profiles. The first profile in the list is 'Navajeeyan', which is highlighted. The table includes columns for 'Action', 'Profile Name' (with a dropdown arrow), 'User License' (set to 'Custom'), and a lock icon. The license is listed as 'Salesforce Platform'. Navigation buttons at the bottom include 'New Profile', 'Edit', 'Delete', and 'Create New View'. A help link 'Help for this Page' is visible in the top right corner.

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



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar is titled 'Setup' and includes sections for Home, Object Manager, and various administrative tools like User Management Settings, Feature Settings, Data.com, Prospector, Service, Embedded Service, and User Interface. The main content area is titled 'Users' under 'SETUP'. It displays a table of 'All Users' with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists four users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty@00d5j00000cirtvea3.o9zzkqu7mup3@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	S.R_Navajeevan	NS.R	2k20cse093@kiot.ac.in		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5j00000cirtvea3.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5j00000cirtvea3.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

At the bottom of the page, there are links for New User, Reset Password(s), and Add Multiple Users. The status bar at the bottom right shows the date and time as 10/1/2023 1:23 PM.

Developer Trailmix Trailmix | Sales | Users | Salesforce

kiot51-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3DretURL%3D%252F005%253FisUserEntityOverride%253D1%2526retURL%253D...

Setup Home Object Manager

Search Setup

Cloud icon

User search bar: 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

SETUP Users

New User

User Edit

Save Save & New Cancel

General Information

First Name: Navajeevan 11
Last Name: S.R
Alias: ns.r
Email: 2k20cse093@gmail.com
Username: 2k20cse093@gmail.com
Nickname: User169614685792499291
Title:
Company:
Department:
Division:

Role: Director, Direct Sales
User License: Salesforce Platform
Profile: Navajeevan
Active: Navajeevan
Marketing User: Standard Platform 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:

Help for this Page

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Developer Trailmix Trailmix | Sales | Users | Salesforce

kiot51-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FappLayout%3Dsetup%26retURL%3D%252F005%253FisUserEntityOverride%25...

Setup Home Object Manager

Search Setup

User

Users

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

New User

User Edit

General Information

First Name	Navajeevan 12	Role	Marketing Team
Last Name	S.R	User License	Salesforce Platform
Alias	ns.r	Profile	Navajeevan
Email	2k20cse093@gmail.com	Active	-None-- Navajeevan
Username	2k20cse093@gmail.com	Marketing User	Standard Platform User
Nickname	User169614699535969223	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None--
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/> <input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

Save Save & New Cancel

Help for this Page

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Developer Trailmix Trailmix | Sales | Users | Salesforce

kiot51-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Search Setup

User

Users

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

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"/>	Chatter.Expert	Chatter	chatty.00d500000cirvea3.o9zzkg7mup3@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit S.R_Navajeevan	NS.R	2k20cse093@kio.ac.in		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit S.R_Navajeevan_11	ns.r	2k20cse093@gmail.com	Director_Direct Sales	<input checked="" type="checkbox"/>	Navajeevan
<input type="checkbox"/>	Edit S.R_Navajeevan_12	ns.r	2k20cse094@gmail.com	Marketing_Team	<input checked="" type="checkbox"/>	Navajeevan
<input type="checkbox"/>	Edit User_Integration	integ	integration@000500000cirvea3.com		<input checked="" type="checkbox"/>	Analytics_Cloud Integration User
<input type="checkbox"/>	Edit User_Security	sec	insightssecurity@00d5j00000cirvea3.com		<input checked="" type="checkbox"/>	Analytics_Cloud Security User

New User Reset Password(s) Add Multiple Users

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

128 PM 10/1/2023

Now you can preview your two user that you have created in my side I had create the two users a Navajeevan 11 and Navajeevan 12 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.

Developer Trailmix Trailmix | Sales | X Permission Sets | Salesforce +

kiot51-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

Verification

User Interface

Action Link Templates

SETUP Permission Sets

Permission Sets

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

In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download 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"/>	Clone	Buyer	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	CRM User	CRM User
<input type="checkbox"/>	Clone	Commerce Admin	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Contact Center Admin	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Agent	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Supervisor	Service Cloud Voice User
<input type="checkbox"/> Del Clone	Experience Profile Manager	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect	Salesforce
<input type="checkbox"/>	Clone	Facility Manager	Facility Manager
<input type="checkbox"/>	Clone	FieldServiceMobileStandardPermSet	Field Service Mobile
<input type="checkbox"/>	Clone	Merchandiser	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Clone	Order Management Agent	Lightning Order Management User
<input type="checkbox"/>	Clone	Order Management Operations Manager	Lightning Order Management User

Help for this Page

1-25 of 29 0 Selected

Page 1 of 2

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Developer Trailmix Trailmix | Sales | X Permission Sets | Salesforce +

kiot51-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

Verification

User Interface

Action Link Templates

SETUP Permission Sets

Permission Set Create

Enter permission set information

Label: API Name: Save Cancel

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

129 PM 10/1/2023

Developer Trailmix Trailmix | Sales | Permission Sets | Salesforce

kiot51-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5j000007Utum%3FsfclFrameOrigin%3Dhttps%253A%252F%252Fkiot51-dev-ed.develop.lig... Video Tutorial | Help for this Page

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Users, Feature Settings, and User Interface. The main content area is titled "Permission Sets" and displays a permission set named "permission12". The "Permission Set Overview" section shows the API Name as "permission12", Namespace Prefix as "", and Created By as "Navajeewan S.R. 01/10/2023, 1:31 pm". Below this, the "Apps" section lists various app-related permissions: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, and External Data Source Access.

Developer Trailmix Trailmix | Sales | Permission Sets | Salesforce

kiot51-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000007Utum%3Fs%3DEntityPermissions

Setup Home Object Manager

Search Setup

Permission Sets permission12

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	--

Action Link Template: javascript:srcSelf(%2F0PS5j000007Utum%3Fs%3DEntityPermissions%26o%3DAccount%26isdtpl%3Dp1);

1:33 PM 10/1/2023

Developer Trailmix Trailmix | Sales | Permission Sets | Salesforce

kiot51-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000007Utum%3Fs%3DEntityPermissions%26o%3DAccount

Setup Home Object Manager

Search Setup

Permission Sets permission12

Accounts

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Account Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	<input type="checkbox"/>	<input type="checkbox"/>

Action Link Template: javascript:srcUp(%2F0PS5j000007Utum%2Fe%3Fs%3DEntityPermissions%26o%3DAccount%26isdtpl%3Dp1);

1:33 PM 10/1/2023

Step 7:

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

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area displays the 'Permission Sets' page. A permission set named 'permission12' is selected. The 'Object Permissions' section for the 'Accounts' object is visible, showing the following settings:

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

The 'Edit Properties' tab is currently selected. The status bar at the bottom right indicates the date and time as 10/1/2023 1:33 PM.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded to show 'User Management Settings' under 'Users'. The main content area shows the 'permission12' permission set for 'Accounts'. It includes sections for 'Object Permissions' and 'Field Permissions'. Under 'Object Permissions', 'Read', 'Create', 'Edit', and 'Delete' are checked. Under 'Field Permissions', 'Account Name', 'Account Number', 'Account Owner', and 'Account Site' have 'Read Access' checked, while 'Edit Access' is unchecked. 'Account Source' has both 'Read Access' and 'Edit Access' unchecked.

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.

Developer Trailmix Trailmix | Sales | Permission Sets | Salesforce

kiot51-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OP55j000007Utum/PermissionSetAssignment/home

Setup Home Object Manager

Search Setup

User permission12

Current Assignments

No assignments defined.

Cloud icon and sun icon illustration.

Action buttons: Edit, Delete, Add Assignment.

Left sidebar:

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

10/1/2023 1:36 PM ENG IN

Developer Trailmix Trailmix | Sales | Permission Sets | Salesforce

kiot51-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OP55j000007Utum/PermissionSetAssignment/new

Setup Home Object Manager

Search Setup

... > PERMISSION SET 'PERMISSION12' > MANAGE ASSIGNMENT EXPIRATION

permission12

Select Users to Assign

All Users

navajeevan

Role, Alias, and Profile aren't searchable. Use filters or sort on these fields instead.

Full Name ↑	Alias	Username	Role	
Navajeevan 11 S.R	ns.r	2k20cse093@gmail.com	Director, Direct Sales	<input checked="" type="checkbox"/> Navajeevan
Navajeevan 12 S.R	ns.r	2k20cse094@gmail.com	Marketing Team	<input checked="" type="checkbox"/> Navajeevan
Navajeevan S.R	NS.R	2k20cse093@kiot.ac.in	System Administrator	<input checked="" type="checkbox"/>

Cancel Next

10/1/2023 1:36 PM ENG IN

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing categories like 'Users', 'Feature Settings', and 'User Interface'. Under 'Users', 'Permission Sets' is selected. The main content area is titled 'PERMISSION SET 'PERMISSION12' > MANAGE ASSIGNMENT EXPIRATION' and 'permission12'. It displays a list titled 'Select Users to Assign' with a dropdown menu 'All Users'. One item is selected: 'Navajeevan 11 S.R.' (ns.r) with the email '2k20cse093@gmail.com' and role 'Director, Direct Sales'. There are two other users listed: 'Navajeevan 12 S.R.' and 'Navajeevan S.R.'. A search bar at the top right contains 'navajeevan'. At the bottom right of the main area is a 'Next' button.

Click on next.

The screenshot shows the continuation of the Salesforce Setup interface. The left sidebar remains the same. The main content area is titled 'PERMISSION SET 'PERMISSION12' > MANAGE ASSIGNMENT EXPIRATION' and 'permission12'. It displays a section titled 'Select an Expiration Option For Assigned Users' with a radio button for 'No expiration date' (selected) and another for 'Specify the expiration date'. Below this is a table titled 'Selected Users' showing one user: 'Navajeevan 11 S.R.' (ns.r) with the role 'Director, Direct Sales' and profile 'Navajeevan'. The table includes columns for 'Full Name', 'Role', 'Profile', 'Active', 'User License', and 'Expires On'. A 'Time Zone' dropdown is also present. At the bottom right of the main area are 'Back' and 'Assign' buttons.

Now click on Assign.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Home, Object Manager, and a search bar. Under "Users", the "User Management Settings" section is highlighted. The main content area is titled "PERMISSION SET 'PERMISSION12' > MANAGE ASSIGNMENTS" and "permission12". It displays an "Assignment Summary" table with the following data:

Full Name	User License	Expires On	Time Zone	Status
Navajeevan 11 S.R	Salesforce Platform			Success

The status column shows a green checkmark icon next to "Success". The bottom right corner of the window has a "Done" button.

Now the specific access for the Navajeevan 11 S.R user has been assigned successfully.

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

Solution:

Step 1: Create a Custom Object

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

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

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

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

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

Email Template
Thank You Email - Survey

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

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
------------------------------------------------------------------	------------------------------------------------------------------------

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							
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>							
Edit Email Alert							
Description: Survey - Thank You Email Unique Name: Survey_Thank_You_Email Object: Survey Result Email Template: Thank You Email - Survey Protected Component: <input type="checkbox"/> Recipient Type: Search: User for: <input type="button" value="Find"/>							
Recipients <table border="1"> <thead> <tr> <th>Available Recipients</th> <th>Selected Recipients</th> </tr> </thead> <tbody> <tr> <td>User: Integration User User: Rakesh Gupta User: Security User</td> <td>Email Field: Email</td> </tr> <tr> <td colspan="2"> <input type="button" value="Add"/> <input type="button" value="Remove"/> </td> </tr> </tbody> </table>		Available Recipients	Selected Recipients	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email	<input type="button" value="Add"/> <input type="button" value="Remove"/>	
Available Recipients	Selected Recipients						
User: Integration User User: Rakesh Gupta User: Security User	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: <input type="text"/>							
From Email Address: 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 **Screen Flow** option and click on **Next** and configure the flow as follows:
 1. **How do you want to start building:** Freeform
5. We will use the **Screen** element to capture a **Survey response** form. Drag and drop a **Screen** element onto the canvas.

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

1. Drag-and-drop the **Create Records** element onto the Flow designer.
2. Enter a name in the **Label (Save Response)** field; the **API Name** will auto-populate.
3. For **How Many Records to Create** – select **One**.
4. For **How to Set the Record Fields** – select **Use separate resources, and literal values**.

5. Select the **Survey_Result__c** object from the dropdown list.

6. Set Field Values for the Survey Result

1. Row 1:

1. **Field: Comment__c**

2. **Value: {!Comment}**

2. Click **Add Row**

3. Row 2:

1. **Field: Email__c**

2. **Value: {!Email.value}**

4. Click **Add Row**

5. Row 3:

1. **Field: Name__c**

2. **Value: {!Name.firstName}**

{!Name.lastName}

6. Click **Add Row**

7. Row 3:

1. **Field: Rating__c**

2. **Value: {!Rating}**

7. Click **Done**.

Edit Create Records

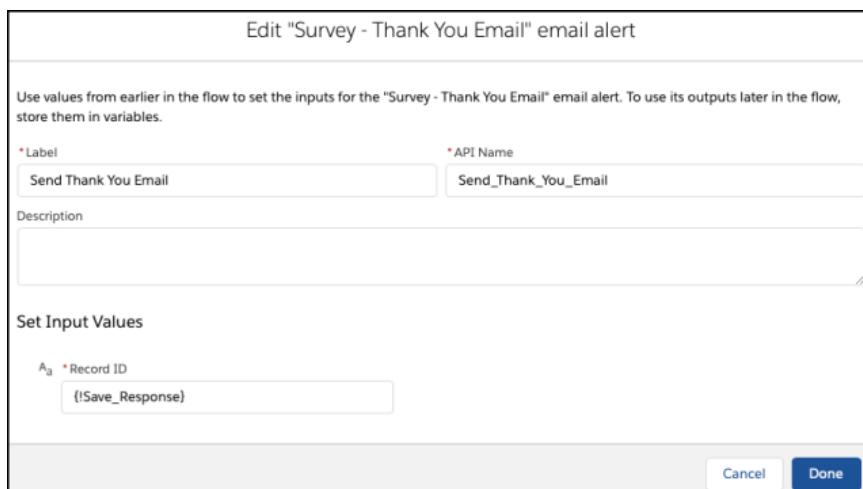
Create Salesforce records using values from the flow.

* Label	* API Name																				
Save Response	Save_Response																				
Description																					
<p>How Many Records to Create</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> One <input type="radio"/> Multiple <p>How to Set the Record Fields</p> <ul style="list-style-type: none"> <input type="radio"/> Use all values from a record <input checked="" type="radio"/> Use separate resources, and literal values 																					
<p>Create a Record of This Object</p> <p>* Object</p> <input type="text" value="Survey Result"/>																					
<p>Set Field Values for the Survey Result</p> <table border="1"> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Comment__c</td> <td>← A_a Comment X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Email__c</td> <td>← A_a Email > Value X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Name__c</td> <td>← {!Name.firstName} {!Name.lastName}</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Rating__c</td> <td>← A_a Rating X</td> </tr> <tr> <td colspan="2"> + Add Field </td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Manually assign variables </td> </tr> </table>		Field	Value	Comment__c	← A_a Comment X	Field	Value	Email__c	← A_a Email > Value X	Field	Value	Name__c	← {!Name.firstName} {!Name.lastName}	Field	Value	Rating__c	← A_a Rating X	+ Add Field		<input type="checkbox"/> Manually assign variables	
Field	Value																				
Comment__c	← A_a Comment X																				
Field	Value																				
Email__c	← A_a Email > Value X																				
Field	Value																				
Name__c	← {!Name.firstName} {!Name.lastName}																				
Field	Value																				
Rating__c	← A_a Rating X																				
+ Add Field																					
<input type="checkbox"/> Manually assign variables																					
<input type="button" value="Cancel"/> <input type="button" value="Done"/>																					

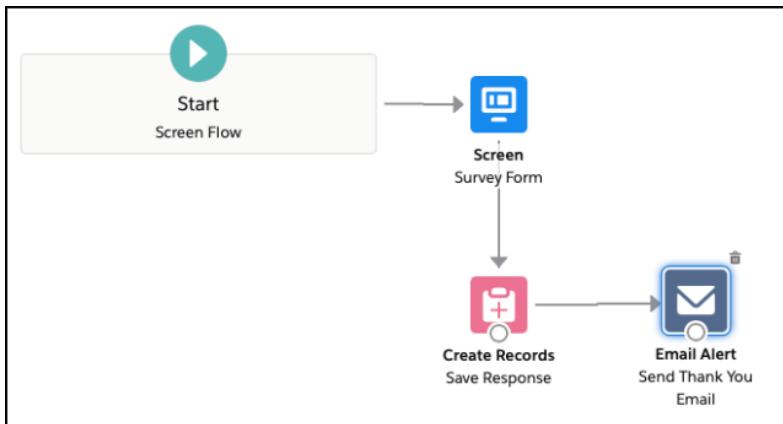
Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

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**.

Save as

A New Version A New Flow

* Flow Label Survey * Flow API Name Survey

Description

Hide Advanced

How to Run the Flow User or System Context—Depends on How Flow is Launched

* Type Screen Flow

* API Version for Running the Flow 51

Interview Label Insert a resource... Survey {!\$Flow.CurrentDateTime}

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

Status: Active Type: Screen Flow Version Number: 2

Cancel Save

The screenshot shows the 'Survey' flow configuration in the Salesforce developer console. Key details include:

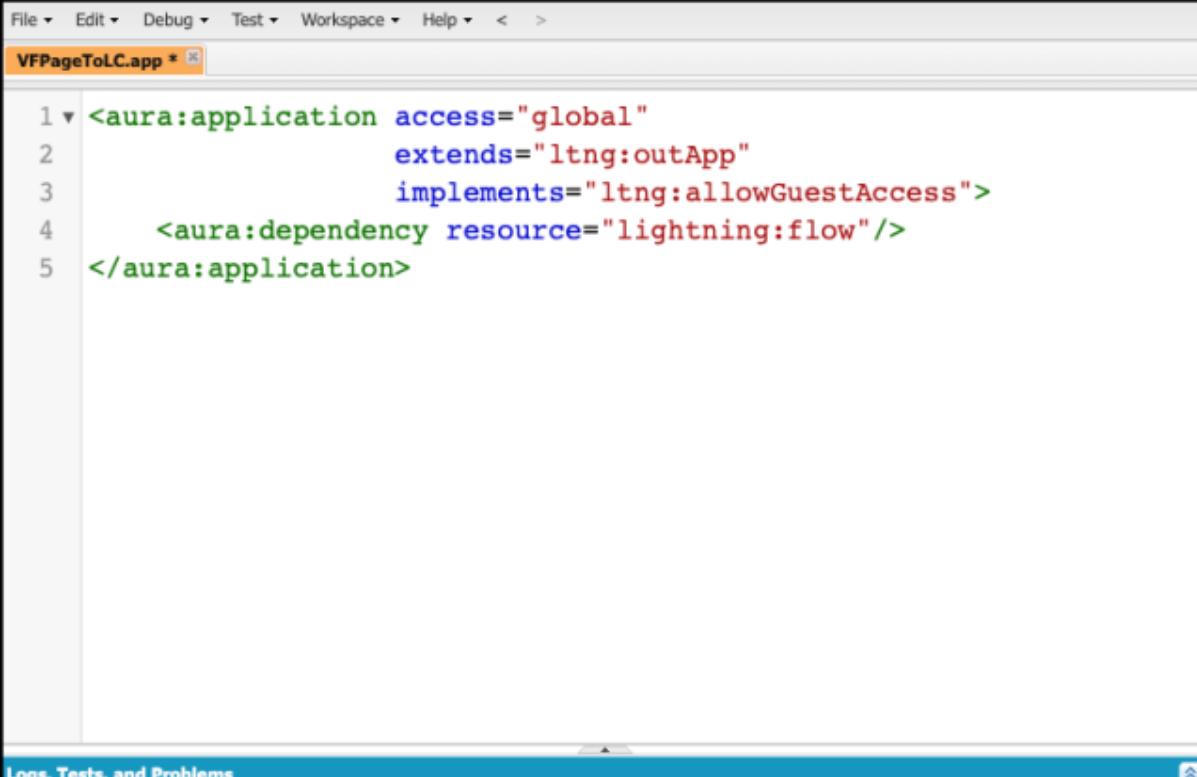
- Flow Label:** Survey
- Flow API Name:** Survey
- Type:** Screen Flow
- API Version for Running the Flow:** 51
- Interview Label:** Survey {!\$Flow.CurrentDateTime}
- Status:** Active
- Type:** Screen Flow
- Version Number:** 2

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

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

1. Click Setup | Developer Console

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



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

- Toolbar:** File, Edit, Debug, Test, Workspace, Help.
- Code Editor:** The file is named "VFPageToLC.app". The code is an Aura component definition:

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

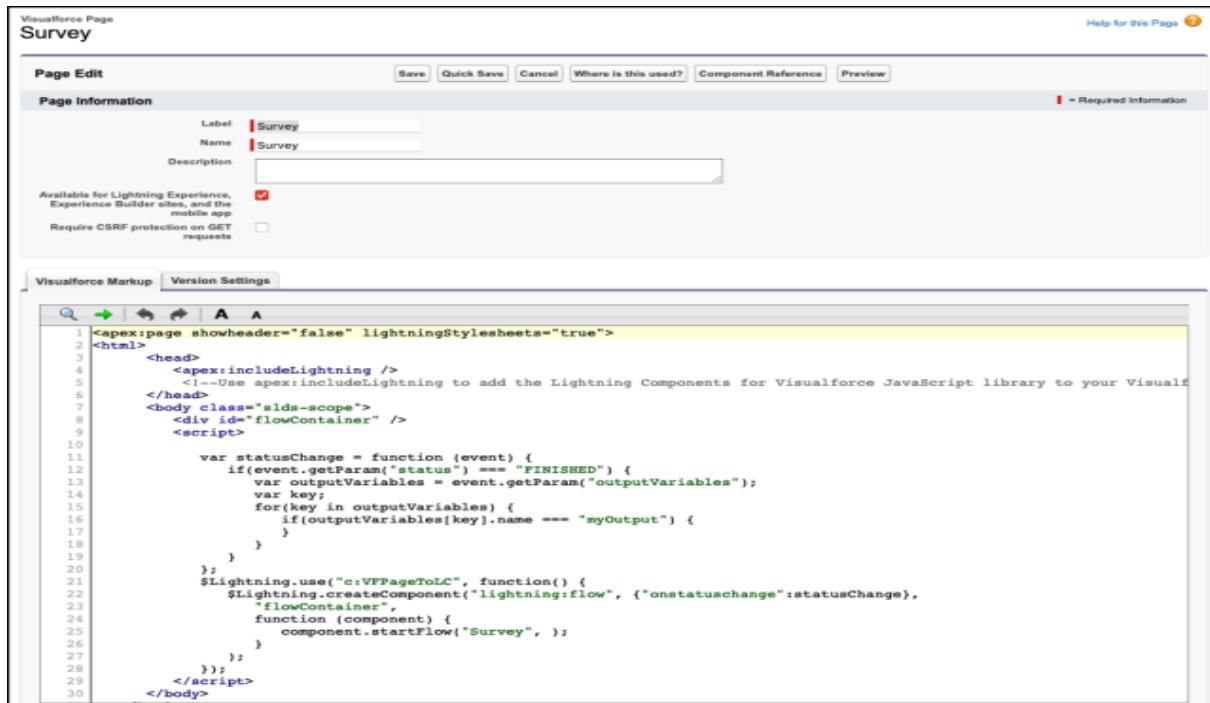
- Status Bar:** Logs, Tests, and Problems.

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**.



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

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	<input type="text"/>
*Rating	5
*Comment	Awesome Blog
Next	

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

The image shows an email inbox with one unread message. The subject of the email is "Thank You For Completing Our Survey!" and it is from "Survey Site Guest User". The email body contains a greeting, a thank you note for participation, and a closing signature. At the bottom of the email are two buttons: "Reply" and "Forward".

Thank You For Completing Our Survey! Inbox

 Survey Site Guest User via b9amq6fe7r-b-cdzwmaa.g0.bnc.salesforce.com
to me

Hi Alok Sinfal,

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

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

Thanks,
Automation Champion

Reply Forward