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Salesforce Developer(Course)  
Assignment no 1

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

Solution:

### Step 1: Create Custom Objects

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

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

- Header:** Search bar with "Search Setup", a gear icon, and various navigation icons.
- Breadcrumbs:** Setup > Home > Object Manager > New Custom Object
- Title:** New Custom Object
- Message Bar:** A yellow bar at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)".
- Custom Object Definition Edit:** Buttons for Save, Save & New, and Cancel.
- Custom Object Information:** A section where users can define labels and examples for the singular and plural forms of the object. It includes fields for "Label" (college), "Plural Label" (colleges), and "Example" (Account). A note says "Starts with vowel sound" with an unchecked checkbox.
- Object Name:** A field labeled "Object Name" containing "college". An example "Account" is shown next to it.
- Description:** A large text area for describing the object.
- Context-Sensitive Help Setting:** Radio buttons for "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page".
- Content Name:** A dropdown menu showing "None".
- Enter Record Name Label and Format:** A section about Record Names. It shows "Record Name" as "college Name" and "Example" as "Account Name".
- Data Type:** A dropdown menu set to "Text".
- Optional Features:** A group of checkboxes for enabling Reports, Activities, Field History, Chatter Groups, and Licensing.
- Object Classification:** A section about enterprise application classification. It shows checkboxes for Allow Sharing, Bulk API Access, and Streaming API Access, all of which are checked.
- Deployment Status:** A section showing "In Development" (radio button) is selected.
- Search Status:** A section about search availability. It shows "Allow Search" (checkbox) is unchecked.
- Object Creation Options:** A section for first-time creation. It shows checkboxes for "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".
- Buttons at the bottom:** Save, Save & New, and Cancel.

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main title is 'New Custom Object'. A message bar at the top indicates that permissions for the object are disabled by default. The form is titled 'Custom Object Definition Edit' and contains several sections:

- Custom Object Information:** Fields include 'Label' (department), 'Plural Label' (departments), and 'Example' (Account). A note says 'Starts with vowel sound' with an unchecked checkbox.
- Description:** A large text area for describing the object.
- Context-Sensitive Help Setting:** Options include opening the standard Salesforce.com Help & Training window or a Visualforce page.
- Content Name:** Set to 'None'.
- Enter Record Name Label and Format:** Fields include 'Record Name' (Department Name) and 'Example' (Account Name). A note states that the Record Name field is always called 'Name' when referenced via the API.
- Data Type:** Set to 'Text'.
- Optional Features:** Checkboxes for Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, and Enable Licensing.
- Object Classification:** Checkboxes for Allow Sharing, Allow Bulk API Access, and Allow Streaming API Access.
- Deployment Status:** Radio buttons for In Development (unchecked) and Deployed (checked).
- Search Status:** Checkbox for Allow Search (unchecked).
- Object Creation Options:** Available only when custom object is first created. Options include Add Notes and Attachments related list to default page layout and Launch New Custom Tab Wizard after saving this custom object.

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

## Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College\_\_c" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."

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

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

**Details**

Fields & Relationships	Description
Page Layouts	API Name
Lightning Record Pages	CDepartment__c
Buttons, Links, and Actions	Custom
Compact Layouts	✓
Field Sets	Singular Label
Object Limits	CDepartment
Record Types	Plural Label
Related Lookup Filters	CDepartments
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	

Edit Delete

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

**Details**

**Fields & Relationships**

New Relationship

Step 3. Enter the label and name for the lookup field Step 3 of 6

Help for this Page

Previous Next Cancel

Field Label: college

Field Name: college

Description:

Help Text:

Child Relationship Name: CDepartments

Sharing Setting:

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:

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

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

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

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

Lookup Filter

The image contains two screenshots of the Salesforce Setup interface, both titled "CDepartment".

**Screenshot 1: New Relationship**

- Left Panel:** Shows the "Fields & Relationships" section selected under "CDepartment". Other options include Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.
- Right Panel:** Titled "New Relationship". Step 2 of 6. Sub-titled "Choose the related object". A dropdown menu shows "Related To college". Navigation buttons: Previous, Next, Cancel.

**Screenshot 2: New Custom Field**

- Left Panel:** Shows the "Fields & Relationships" section selected under "CDepartment". Other options are identical to Screenshot 1.
- Right Panel:** Titled "New Custom Field". Step 1 of 6. Sub-titled "Choose the field type". A dropdown menu shows "Data Type" selected. Options include:
  - None Selected
  - Auto Number
  - Formula
  - Roll-Up Summary
  - Lookup Relationship
  - Master-Detail Relationship
  - External Lookup Relationship
 Detailed descriptions for each type are provided, such as "A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record." and "Creates a special type of master-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: • The master record is required on all detail records. • The ownership and sharing of a detail record are determined by the master record. • When a user deletes the master record, all detail records are deleted. • You can create roll-up summary fields on the master record to summarize the detail records.".

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

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

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

- 2. Click the "New" button to create a new custom field.**
- 3. Choose "Roll-Up Summary" as the 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.**

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	college	college__c	Master-Detail(college)	college	✓
	Created By	CreatedBy	Lookup(User)		
	Department Name	Name	Text(80)		✓
	Last Modified By	LastModifiedBy	Lookup(User)		

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. It displays a list of custom object tabs:

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

Below this, sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs' are shown, each with a note indicating no items have been defined.

The screenshot shows the Salesforce Setup interface under the 'Object Manager' section for the 'college' object. It is on 'Step 5. Add to page layouts' of creating a new custom field:

**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 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.

Add Field  Page Layout Name  
 college Layout

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

The screenshot shows the Salesforce Object Manager interface for creating a new custom field named "Total count" on the "college" object. The field is defined as a Roll-Up Summary type with the name "Total\_count". The "Field-Level Security for Profile" section lists various user profiles with checkboxes for "Visible" and "Read Only" permissions. Most profiles have both checkboxes checked.

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

The screenshot shows the Salesforce Object Manager interface for creating a new custom field named "Total count" on the "college" object. The "Step 3. Define the summary calculation" page is displayed. It shows the "Select Object to Summarize" section where "college" is the master object and "CDepartments" is the summarized object. The "Select Roll-Up Type" section has "COUNT" selected. The "Filter Criteria" section has "All records should be included in the calculation" selected. Navigation buttons for "Previous", "Next", and "Cancel" are visible at the bottom right.

**New Custom Field**

**Step 2. Enter the details**

Field Label:  [?](#)

Field Name:  [?](#)

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](#)

**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.
  - This relationship is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship Creates a specific type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
  - This relationship is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- True/False Allows users to select a True (checked) or False (unchecked) value.

**Step 1**

[Next](#) [Cancel](#)

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'college'. On the right side of the header are various icons for account management. Below the header, the page title is 'SETUP > OBJECT MANAGER college'. On the left, a sidebar lists several configuration options: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Fields & Relationships' and shows a table with four items. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

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 with the 'Tabs' tab selected in the left sidebar. The main content area is titled 'New Custom Object Tab' and 'Step 2. Add to Profiles'. It displays a list of user profiles on the left and a grid of 'Tab Visibility' dropdowns on the right. The first dropdown in the grid is set to 'Default On'. The top right corner of the grid shows 'Step 2 of 3'. At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons.

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main content area is titled 'New Custom Object Tab' and is divided into three steps. Step 1, 'Enter the Details', is active. It includes fields for selecting an object ('Object: college') and choosing a tab style ('Tab Style: Jewel'). Step 2, 'Customize the Tab', is partially visible below. A sidebar on the left lists 'User Interface' components: 'Rename Tabs and Labels' (selected), 'Tabs', and 'Global Search'.

The screenshot shows the 'Tabs' configuration page at Step 3, 'Add to Custom Apps'. It lists various custom apps and their visibility status. Most apps have the 'Include Tab' checkbox checked. A checkbox at the bottom left, 'Append tab to users' existing personal customizations', is also checked. The sidebar on the left shows the 'Tabs' component is selected.

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

**New Custom Object Tab**

Step 1. Enter the Details

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

Object	CDEPARTMENT
Tab Style	Lightning

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

Splash Page Custom Link	-None-
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Enter a short description.

Description

Next Cancel

**Lightning Experience App Manager**

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

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

Salesforce Setup Home Object Manager

Search 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.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit   Del	Book1	Box	
Edit   Del	CDepartments	Lightning	
Edit   Del	colleges	Jewel	
Edit   Del	Research_Proposal	Square	
Edit   Del	student	Box	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

Help for this Page

Salesforce Setup Home Object Manager

Search Setup

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

\* App Name: My college

\* Developer Name: My\_college

Description: Enter a description...

App Branding

Image:

Primary Color Hex Value: #217AC7

Org Theme Options:  Use the app's image and color instead of the org's custom theme

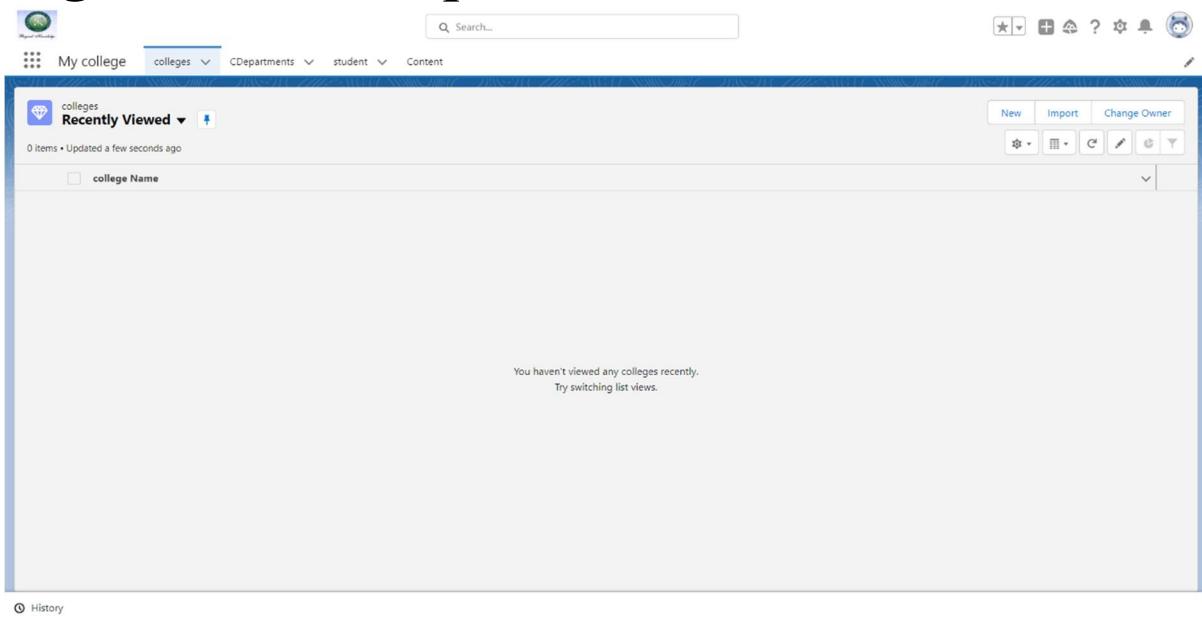
Next

Salesforce Offline 14 Sales LightningSales Manage your sales process with accounts, leads, opportunities, and more 14/07/2023, 10:47 am Lightning

## **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.**



New college

Information

\* = Required Information

Owner: krishna s

college Name: kiot

phone: 9087116402

Email: kiot@ac.in

Location:

Latitude: 90

Longitude: 80

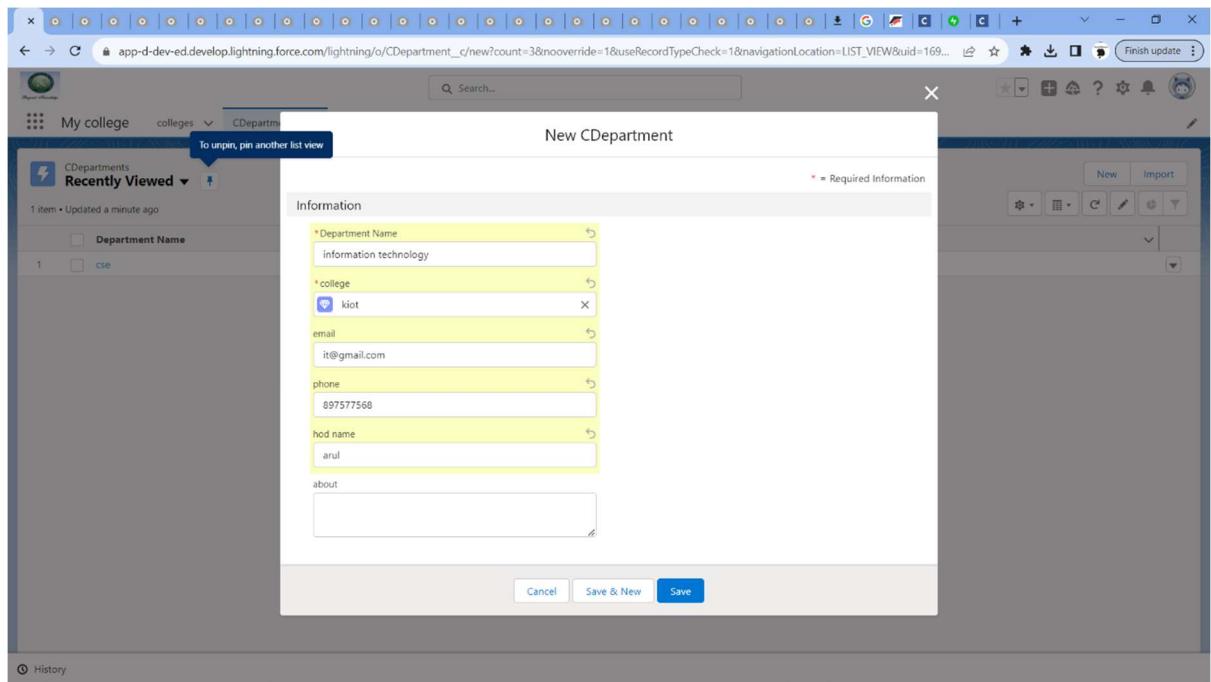
Cancel Save & New Save

CDepartments

Recently Viewed

1 item • Updated a few seconds ago

Department Name: cse



My college colleges CDdepartments student Content

CDepartment information technology

New Contact Edit New Opportunity

Related Details

Department Name  
information technology

college  
kiot

email  
it@gmail.com

phone  
897577568

hod name  
arul

about

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

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

History

My college colleges CDdepartments student Content

College kiot

New Contact Edit New Opportunity

Related Details

college Name  
kiot

Total count  
1

phone  
9087116402

Email  
kiot@gmail.com

Location  
90, 80

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

Last Modified By krishna s. 01/10/2023, 11:17 am

History

My college colleges CDdepartments student Content

CDepartments Recently Viewed

1 item • Updated a few seconds ago

Department Name

cse

New Import

History

My college colleges CDdepartments student Content

Recently Viewed ▾

1 item • Updated a few seconds ago

college Name

1 kiot

New Import Change Owner

History

My college colleges CDdepartments student Content

college kiot

New Contact Edit New Opportunity

Related Details

college Name	kiot
Total count	2
phone	9087116402
Email	kiot@gmail.com
Location	90, 80

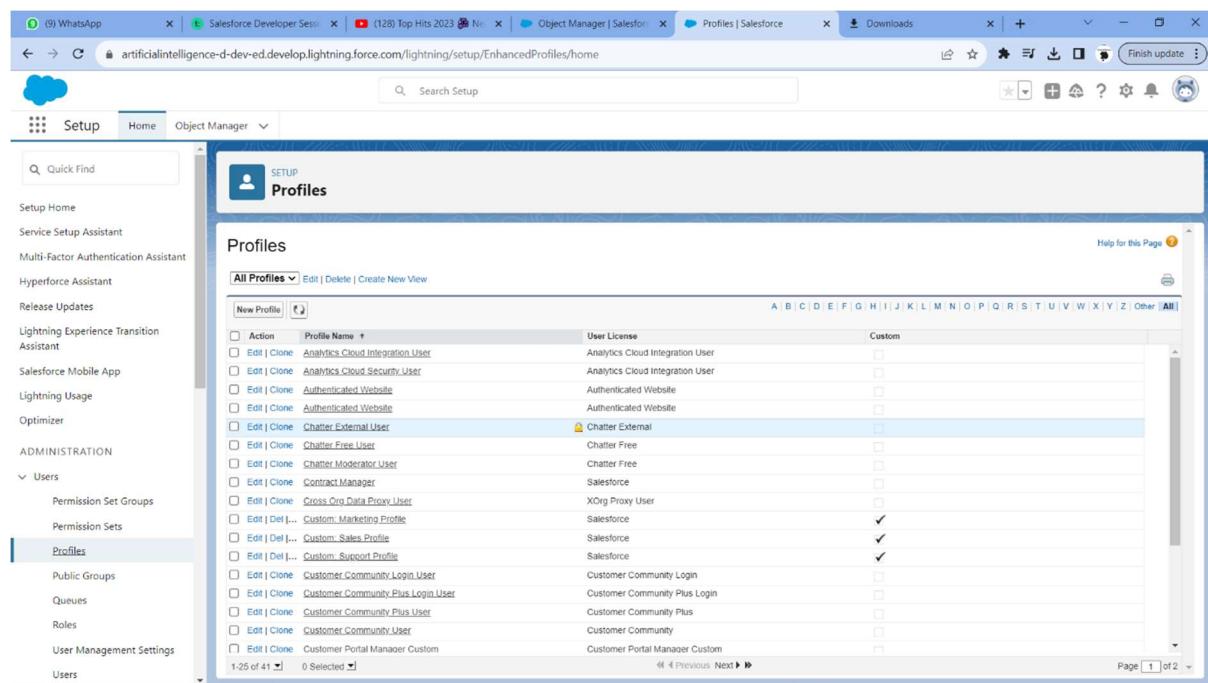
Created By krishna s. 01/10/2023, 11:16 am

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

2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

Solution:

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



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

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

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

The main content area displays a table titled "Profiles" with the following data:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit   Delete	salesmanager	Salesforce	<input checked="" 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"/>

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

The screenshot shows the "Clone Profile" dialog box. The left sidebar is identical to the previous screenshot. The dialog has a header "Clone Profile" and a sub-header "Enter the name of the new profile". A message at the top states "You must select an existing profile to clone from." Below this, there are fields for "Existing Profile" (set to "Standard Platform User"), "User License" (set to "Salesforce Platform"), and "Profile Name" (with a red box highlighting the input field). At the bottom are "Save" and "Cancel" buttons.

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

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

Clone Profile Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page

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

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

Profile Manager

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

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

Profile Detail

Name	Manager
User License	Salesforce Platform
Description	
Created By	GOPALS_01/10/2023, 7:09 pm
Modified By	GOPALS_01/10/2023, 7:09 pm

Page Layouts

Standard Object Layouts	Global	Operating Hours
Email Application	No Assignment [View Assignment]	Order [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product [View Assignment]
Account	Account Layout [View Assignment]	Payment [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment Authorization [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Gateway [View Assignment]

The screenshot shows the Salesforce Setup Manager interface. The left sidebar is titled "Setup" and includes links for "Home", "Object Manager", "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings", and "Users". The main content area is titled "Profiles" and "Manager". It displays a "Profile Edit" form for a profile named "Manager". The "User License" is set to "Salesforce Platform". A "Description" field is present. Below the form, there are sections for "Custom App Settings" and "Service Provider Access". Under "Custom App Settings", there are two rows: one for "Analytics Studio (standard\_\_Insights)" and another for "App Launcher (standard\_\_AppLauncher)". The "Analytics Studio" row has a "Visible" checkbox and a "Default" radio button. The "App Launcher" row has a "Visible" checkbox checked, a "Default" radio button, and a "kiot (kiot)" label. Under "Service Provider Access", there are two rows: "Platform (standard\_\_Platform)" and "WDC (standard\_\_Work)". The "Platform" row has a "Visible" checkbox checked and a "Default" radio button. The "WDC" row has a "Visible" checkbox checked and a "Default" radio button. At the bottom, there is a "Tab Settings" section with a checkbox for "Overwrite users' personal tab customizations". The "Standard Tab Settings" table includes columns for "Home", "Accounts", "Alert Settings", "Learning", "Libraries", and "Lightning Bolt Solutions". The "Home" column shows "Default On". The "Accounts" column shows "Default On". The "Alert Settings" column shows "Default On". The "Learning" column shows "Default On". The "Libraries" column shows "Tab Hidden". The "Lightning Bolt Solutions" column shows "Default On".

The screenshot shows the Salesforce 'Profiles' setup page. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage Optimizer, Administration, and Users (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users).

The main content area has a 'SETUP Profiles' header. It displays 'Communication Subscription Channel Types' and 'Communication Subscription Consents' sections with checkboxes for various options like 'Email', 'SMS', 'Push Notifications', etc. Below these are sections for 'Individuals', 'Locations', 'Party Consents', 'Push Topics', 'Sellers', 'Streaming Channels', and 'User External Credentials'. A 'Custom Object Permissions' section shows checkboxes for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All) for objects like 'Bank' and 'customers'. An 'Enhancement Requests' section is also present. The bottom part of the page contains 'Session Settings' (Session Times Out After: 2 hours of inactivity) and 'Password Policies' (User passwords expire in: 90 days, Enforce password history: 3 passwords remembered, Minimum password length: 8).

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e500000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce

The screenshot shows the Salesforce Setup interface under the Profiles tab. On the left, the navigation sidebar includes links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users). The main content area displays the Enhanced Profiles configuration. It includes sections for Contact Point Addresses, Contact Point Consents, Contact Point Emails, and various Custom Object Permissions for objects like Bank and customers. The permissions are broken down into Basic Access (Read, Create, Edit, Delete), View All, and Data Administration (Modify All).

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e500000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce

This screenshot shows the same Salesforce Setup interface and Enhanced Profiles configuration as the first one, but with different permission settings for the Custom Object Permissions section. For the Bank object, the Read, Create, Edit, Delete, and Modify All checkboxes are checked for both Bank and customers. The other sections (Session Settings and Password Policies) remain the same.

Salesforce Developer Session | lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQbz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | X | Finish update

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

Custom Object Permissions

	Basic Access	Create	Edit	Delete	View All	Modify All	Basic Access	Create	Edit	Delete	View All	Modify All
Bank	<input checked="" type="checkbox"/>											
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Enhancement Requests	<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:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

Salesforce Developer Session | lightning/setup/ManageUsers/home | Object Manager | Salesforce | Users | Salesforce | Downloads | + | - | X | Finish update

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

All Users

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

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

View: All Users | Edit | Create New | View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit   Login	Adanna_Ciya	dadan	test_ciya_pas_4w8lybf9wtk_ts2grg5kxox_3qj8cfoyzwms_h143tkzv6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JMS User
<input type="checkbox"/>   Edit	Chatter_Expert	Chatter	chatty_00d500000bc5kkaeb_lo0fmymoike@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit   Login	Ellington_Amelia	aell	amelia_ellington_146kxc9p00nhs6cywodcu4wh_hnb0wmyvhho.wguctor1dah@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	S_GCPA	GS	kot520@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	User_Integration	Integ	integration_000df50000bc5kkaeb.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity_000df50000bc5kkaeb.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, the navigation sidebar includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with 'Users' expanded), and various platform tools like Data, Email, and Apps.

The main content area displays the 'New User' page under 'User Edit'. The 'General Information' section contains fields for First Name (Sowmiya), Last Name (Balaji), Alias (sbala), Email (2k20cse179@kiot.ac.in), Username (2k21it@kiot.ac.in), Nickname (User169616771282564526), Title (worker), Company (kiot bank), Department, and Division. The 'Role' dropdown is set to '<None Specified>'. The 'User License' dropdown is set to 'Salesforce Integration'. The 'Profile' dropdown is set to 'Salesforce API Only System Integrations'. The 'Active' checkbox is checked. Other user settings like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, and Debug Mode are also visible.

This screenshot shows the same 'New User' page as the first one, but with different configuration. The 'Profile' dropdown is now set to 'Manager'. The 'User License' dropdown is set to 'Salesforce Platform'. All other fields and settings remain the same as in the first screenshot.

The screenshot shows the Salesforce Setup interface for managing users. On the left, a sidebar lists various setup categories like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, and Administration. Under Administration, the 'Users' section is selected. The main content area displays a user profile for 'Sowmyya bala'. The profile includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password Authenticator, and App Registration: Salesforce Authenticator. The user is assigned to the 'Manager' role and has the 'Active' status checked. The right side of the screen shows a list of other users.

**User Detail**

Name	sowmyya bala	Role	Salesforce Platform
Alias	sbalia	User License Profile	Manager
Email	2k21it@kiot.ac.in [Verify]	Marketing User	<input checked="" type="checkbox"/>
Username	2k21it@kiot.ac.in	Offline User	<input type="checkbox"/>
Nickname	User16961677128256452616	Knowledge User	<input type="checkbox"/>
Title	worker	Flow User	<input type="checkbox"/>
Company	kiot bank	Service Cloud User	<input type="checkbox"/>
Department		Site.com Contributor User	<input type="checkbox"/>
Division		Site.com Publisher User	<input type="checkbox"/>
Address		WDC User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Mobile Push Registrations	<input checked="" type="checkbox"/>
Locale	English (India)	Data.com User Type	<input type="checkbox"/>
Language	English	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Delegated Approver		Debug Mode	<input type="checkbox"/>
Manager	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/>
Receive Approval Request Emails		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Federation ID		Salesforce CRM Content User	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator			
App Registration: Salesforce Authenticator			

**Welcome to Salesforce!**

Click below to verify your account.

**Verify Account**

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

Username:  
2k21it@kiot.ac.in

Again, welcome to Salesforce!

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Salesforce Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password: ..... Good

\* Confirm New Password: ..... Match

Security Question: In what city were you born?

\* Answer: salem

Change Password

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

Login | Salesforce

Username: 2k21it@kiot.ac.in

Password: .....

Log In

Remember me

Forgot Your Password?

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

WATCH ON DEMAND

AIDay

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Recently Viewed | Bank | Salesfo... +

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

Incognito Finish update

Search...

kiot Bank customers Home

Bank Recently Viewed

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

Bank Name ↓

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

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

DISPLAY DENSITY  
✓ Comfy  
Compact

OPTIONS  
Switch to Salesforce Classic ⓘ  
Add Username

New Bank | Salesforce +

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

Incognito Finish update

Search...

kiot Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

\* = Required Information

Information

\*Bank Name  
boi

Owner  
sowmiya bala

phoneno  
0897754534

Cancel Save & New Save

New customer | Salesforce

Recently Viewed

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

customer Name ↓

New customer

\* = Required Information

Information

\* customer Name: madhu

\* Bank: boi

Cancel Save & New Save

customer | Salesforce

customer "madhu" was created.

Related Details

customer Name: madhu

Bank: boi

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

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

New Contact Edit Delete

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is titled "Setup" and includes sections for "Home", "Object Manager", "Quick Find", "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Hyperforce Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", "Optimizer", and "ADMINISTRATION". Under "ADMINISTRATION", the "Users" section is expanded, showing "Permission Set Groups", "Permission Sets", "Profiles", "Public Groups", "Queues", "Roles", and "User Management Settings". The main content area is titled "SETUP Profiles" and displays a table of profiles. The columns are "Action", "Profile Name", "User License", and "Custom". The table contains the following data:

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   Del ...	salesmanmanager	Salesforce	<input checked="" 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"/>

At the bottom of the page, there are navigation links for "1-7 of 7" and "0 Selected", along with "Previous" and "Next" buttons. A status bar at the bottom right indicates "Page 1 of 1".

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

- Header:** The URL is <https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fu%2Fprofile%2FprofileClone%2F>. The title bar also includes "Salesforce Developer Session 2", "Top Hits 2023", "Profiles | Salesforce", and "Welcome to Salesforce: Verify your...
- Left Navigation Bar:** Includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and a expanded section for Users containing: Permission Set Groups, Permission Sets, **Profiles** (which is selected and highlighted in blue), Public Groups, Queues, Roles, User Management Settings, and Users.
- Search Bar:** A search bar at the top right contains the placeholder "Search Setup".
- Page Content:** The main content area is titled "Profiles" with a sub-section "Clone Profile". It prompts the user to "Enter the name of the new profile." Below this, a note says "You must select an existing profile to clone from." A table shows the selection: "Existing Profile" is "Standard Platform User", "User License" is "Salesforce Platform", and "Profile Name" is "Salesmanager". At the bottom are "Save" and "Cancel" buttons.

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

**Profile**  
**salesmanage**

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

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

**Profile Detail**

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

**Page Layouts**

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

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

**Profile Edit**  
**salesmanage**

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	salesmanage	Save	Save & New	Cancel
User License	Salesforce Platform			
Description				

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

**Standard Tab Settings**

Home	Default On
Accounts	<input checked="" type="radio"/>
Opportunities	<input type="radio"/>
Leads	<input type="radio"/>
Threads	<input type="radio"/>

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

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

Custom Object Permissions

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

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

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 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

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

Setup Home Object Manager

Search Setup

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

New User

User Edit Save Save & New Cancel

General Information

First Name:  Role: <None Specified>

Last Name:  User License: Salesforce Integration

Alias:  Profile: Salesforce API Only System Integrations

Email:  Active:

Username:  Marketing User:

Nickname:  Offline User:

Title:  Knowledge User:

Company:  Flow User:

Department:  Service Cloud User:

Division:  Site.com Contributor User:

Data.com User Type:  Site.com Publisher User:

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Salesforce Platform

salesmanager

madhu

b

2k20cse179@kiot.ac.in

2k20cscit@kiot.ac.in

User169616842428654192

worker

kiot bank

Sales

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

The screenshot shows the Salesforce Setup interface with the 'Users' page open. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and a search bar. Under 'User Management Settings', 'Users' is selected. The main content area displays the 'Users' page with sections for 'Mailing Address', 'Single Sign On Information', 'Locale Settings', and 'Approver Settings'. The 'Mailing Address' section contains fields for Street, City, Zip/Postal Code, State/Province, and Country. The 'Single Sign On Information' section has a 'Federation ID' field. 'Locale Settings' include Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), and Language (English). 'Approver Settings' allow setting Delegated Approver, Manager, and Receive Approval Request Emails (set to 'Only if I am an approver'). A checkbox for generating a new password is checked. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

This screenshot is identical to the one above, but the 'Street' field in the 'Mailing Address' section now contains the value '4/194, ariyampalayam, utthamasolapuram ..'. All other fields in the 'Mailing Address' section remain empty. The rest of the page content is identical to the first screenshot.

Screenshot of a web browser showing two windows side-by-side.

The top window is a Salesforce developer session titled "Salesforce Developer Session 2". It shows the "Users | Salesforce" page with a user named "madhu b" selected. The "User Detail" section displays various user information such as Name (madhu b), Alias (mb), Email (2k20csit@kiot.ac.in), Username (2k20csit@kiot.ac.in), Nickname (User16961684242855419206), Title (worker), Company (kiot bank), Department (Sales), Division (Address: 41/94, ammapalayam, umasolapuram .., ParaiKKadu , salem- 636308, SALEM 636308, TAMIL NADU), Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata), Locale (English (India)), Language (English), Delegated Approver (Manager), Receive Approval Request Emails (Only if I am an approver), Federation ID, App Registration: One-Time Password Authenticator, Role (Marketing User, Active checked), User License (Salesforce Platform Profile: salesmanager), Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations (View), Data.com User Type (View), Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling (checked), and a note about "Customization CRM Contact Home".

The bottom window is a Gmail inbox titled "Gmail". It shows the "Inbox" folder with 5,318 messages. A modal window titled "Welcome to Salesforce!" is open, prompting the user to verify their account by clicking a "Verify Account" button. It also provides a URL (<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>) and the username (2k20csit@kiot.ac.in). The modal includes a note: "Again, welcome to Salesforce!". At the bottom of the modal, it says "© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners." and "Salesforce.com, inc. The Landmark at One Market, Suite 300, San Francisco, CA, 94105, United States".

Change Your Password | Salesforce

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



## Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
In what city were you born?

\* Answer  
india

Change Password

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

Recently Viewed | Bank | Salesforce

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

Recently Viewed

Bank

customers

Home

Search...

New

Bank Name

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

List View

The screenshot shows two open browser tabs. The top tab is 'Recently Viewed' under the 'customers' category, showing a single entry: '0 items • Updated a few seconds ago'. The bottom tab is 'Permission Sets' in the 'Setup' section, displaying a list of permission sets with columns for Action, Permission Set Label, Description, and License.

**Recently Viewed**

0 items • Updated a few seconds ago

customer Name

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

**List View**

(9) WhatsApp | Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce! | Reset Password | Salesforce | + | Finish update

**Setup**

Search Setup

**Permission Sets**

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

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

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/>	AccessToActivity	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	CRM User	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	CommerceAdmin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	ContactCenterAdmin	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	ContactCenterAgent	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	ContactCenterSupervisor	Salesforce	Salesforce
<input type="checkbox"/>	ExperienceProfileManager	Lets users create, read, edit, and delete locations, sublocations, que...	Facility Manager
<input type="checkbox"/>	FieldServiceMobileStandardPermissionSet	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"/>	OrderManagementAgent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	OrderManagementOperationsManager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	OrderManagementShopper	Limited access to Order Management features for Self Service	Lightning Order Management User

1-25 of 29 ▾ 0 Selected ▾

Page 1 of 2

## Step 2:

### Permission Sets:

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

### Object-Level Security:

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

### Record-Level Security:

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

### Ownership:

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

## Organization-Wide Defaults:

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

## Testing:

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

The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar is the 'Setup' menu with 'Users' selected, showing sub-options like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Prospector', 'Service', 'Embedded Service', 'User Interface', and 'Actions & Recommendations'. The main content area has a header 'Permission Sets' with a search bar. Below it is a table listing various permission sets. The columns are 'Action', 'Permission Set Label +', 'Description', and 'License'. Some rows have a yellow warning icon. The table includes entries like 'Access\_to\_activity', 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact\_Center\_Admin', 'Contact\_Center\_Agent', 'Contact\_Center\_Supervisor', 'Experience\_Profile\_Manager', 'Facility\_Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order\_Management\_Agent', 'Order\_Management\_Operations\_Manager', and 'Order\_Management\_Shopper'. At the bottom, there are navigation links for '1-25 of 29' and '0 Selected', and a page footer 'Page | 1 of 2'.

Action	Permission Set Label +	Description	License
<input type="checkbox"/>	Access_to_activity	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Clone	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Clone	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"/>	Def   Clone	Salesforce	
<input type="checkbox"/>	Experience_Profile_Manager	Facility Manager	
<input type="checkbox"/>	Facility_Manager	Let's 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"/>	Clone	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Agent	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Operations_Manager	Limited access to Order Management features for Self Service	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Shopper		

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SEARCH Setup

PERMISSION SETS

CREATE

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:  -None-

Save Cancel

Help for this Page

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SEARCH Setup

PERMISSION SETS

CREATE

Enter permission set information

Label:  salesmanager

API Name:  salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:  -None-

Save Cancel

Help for this Page

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

**Permission Set Overview:**

Setting	Description	API Name	Namespace Prefix
License	Permissions to access objects and fields, and settings such as tab availability	salesmanager	
Session Activation Required	checkbox		
Last Modified By	GOPALS_01/10/2023, 7:29 pm	GOPALS	01/10/2023, 7:29 pm

**Apps:**

- Assigned Apps:** Settings that specify which apps are visible in the app menu
- Assigned Connected Apps:** Settings that specify which connected apps are visible in the app menu
- Object Settings:** Permissions to access objects and fields, and settings such as tab availability
- App Permissions:** Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access:** Permissions to execute Apex classes
- Visualforce Page Access:** Permissions to execute Visualforce pages
- External Data Source Access:** Permissions to authenticate against external data sources
- Flow Access:** Permissions to execute Flows

**Object Settings:**

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insights 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 Invites	--	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	--

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

The left sidebar shows the navigation menu under 'Users':

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

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Bank' tab is selected. The 'Tab Settings' section shows 'Available' and 'Visible' status. The 'Object Permissions' section lists permissions for the 'Bank' object:

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"/>

The 'Field Permissions' section lists permissions for fields in the 'Bank' object:

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

Screenshot of the Salesforce Setup interface showing the Permission Sets page for the 'salesmanager' permission set after changes have been made.

The left sidebar shows the navigation menu under 'Users':

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

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Bank' tab is selected. The 'Tab Settings' section shows 'Available' and 'Visible' status. The 'Object Permissions' section lists permissions for the 'Bank' object:

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"/>

The 'Field Permissions' section lists permissions for fields in the 'Bank' object:

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

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

Setup Home Object Manager

Search Setup

User salesmanager

Current Assignments

No assignments defined.

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

Setup Home Object Manager

Search Setup

Select Users to Assign

All Users

Full Name ↑	All... ↓	Username	Role	Ac... ↓	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9oodih.d6cwpdcuo4wh.hnbdwvwvhq.wguctr1dalv@gmail.com	<input checked="" type="checkbox"/>	Force.com - App Subscription User	
Chatter Expert	Chatty	chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	
Diya Adanna	dadan	test_dyia_pas.4w8bjybi9wik.tszgrgsbkpx.3gi0fovzwns.h43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>	UMS User	
GOPAL S	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>	System Administrator	
Integration User	integ	integration@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>	salesmanage	
Security User	sec	insightssecurity@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	
sowmiya bala	sbala	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>	Manager	

Cancel Next

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

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/OP55j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

Time Zone

Selected Users

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

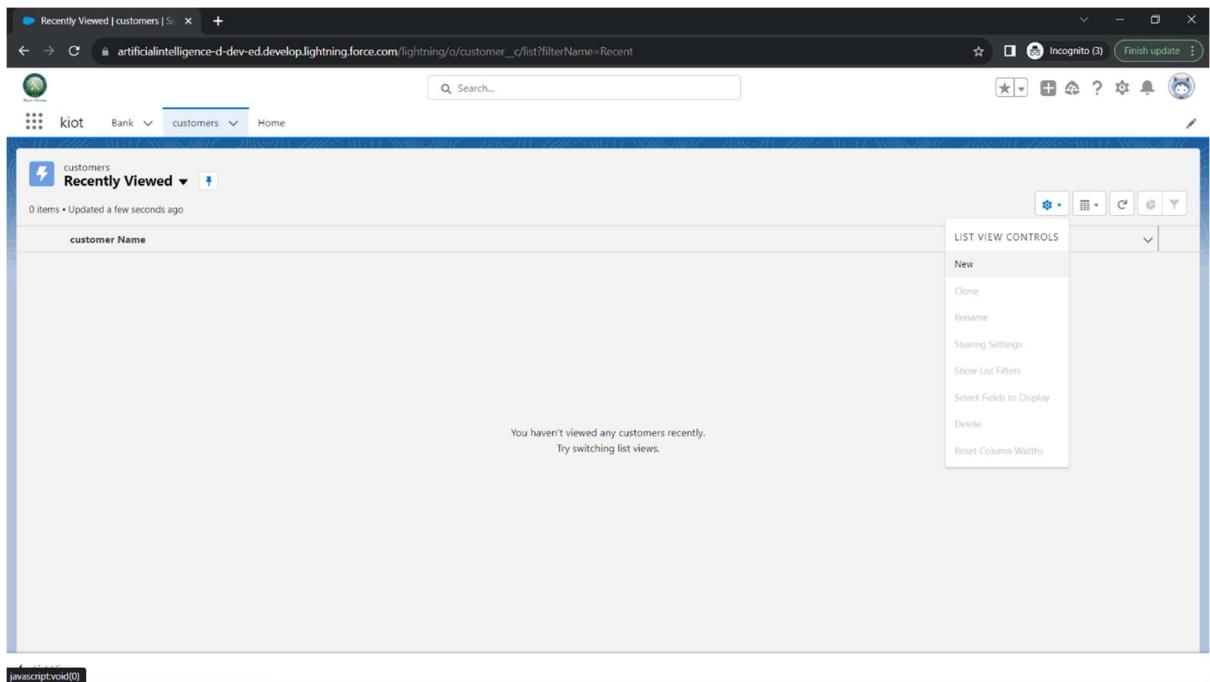
Cancel Back Assign

PERMISSION SET 'SALESMANA' assignments were successful.

Assignment Summary

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

Done



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

Solution:

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

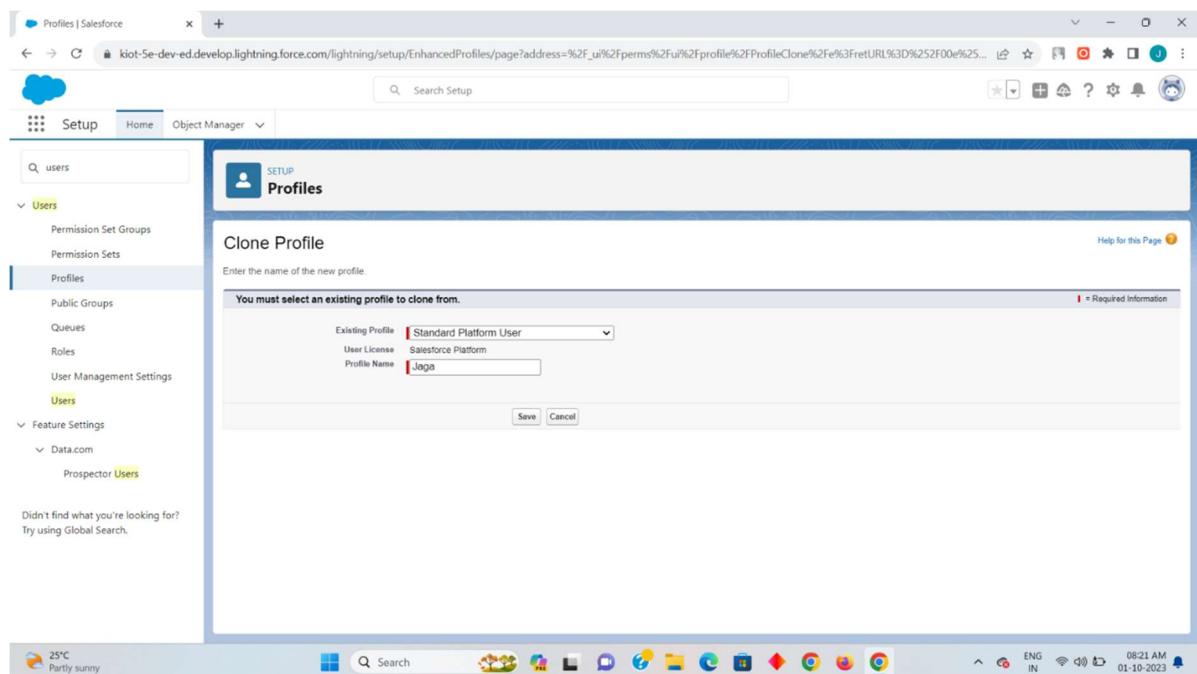
## Setup-quick search[profile]

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

- Page Title:** Profiles | Salesforce
- URL:** kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e%3FisDeleteRedirect%3Dtrue%26setupid%3DEnhancedProfiles
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager. Under "Users", "Profiles" is selected. Other options include "Permission Set Groups", "Permission Sets", "Public Groups", "Queues", "Roles", "User Management Settings", "Feature Settings", "Data.com", and "Prospector". A note says "Didn't find what you're looking for? Try using Global Search."
- Header:** SETUP Profiles
- Section:** Profiles
- Buttons:** All Profiles, Edit | Delete, Create New View, New Profile, Help for this Page
- Table:** A list of profiles with columns: Action, Profile Name, User License, and Custom. Some profiles have checkboxes next to them. Examples include:
  - Action: Edit | Clone, Profile Name: Analytics Cloud Integration User, User License: Analytics Cloud Integration User, Custom: (checkbox)
  - Action: Edit | Clone, Profile Name: Analytics Cloud Security User, User License: Analytics Cloud Integration User, Custom: (checkbox)
  - Action: Edit | Clone, Profile Name: Authenticated Website, User License: Authenticated Website, Custom: (checkbox)
  - Action: Edit | Clone, Profile Name: Authenticated Website, User License: Authenticated Website, Custom: (checkbox)
  - Action: Edit | Clone, Profile Name: Chatter External User, User License: Chatter External, Custom: (checkbox)
  - Action: Edit | Clone, Profile Name: Chatter Free User, User License: Chatter Free, Custom: (checkbox)
  - Action: Edit | Clone, Profile Name: Chatter Moderator User, User License: Chatter Free, Custom: (checkbox)
  - Action: Edit | Clone, Profile Name: Contract Manager, User License: Salesforce, Custom: (checkbox)
  - Action: Edit | Clone, Profile Name: Cross Org Data Proxy User, User License: XOrg Proxy User, Custom: (checkbox)
  - Action: Edit | Del..., Profile Name: Custom Marketing Profile, User License: Salesforce, Custom: (checkbox)
  - Action: Edit | Del..., Profile Name: Custom Sales Profile, User License: Salesforce, Custom: (checkbox)
  - Action: Edit | Del..., Profile Name: Custom Support Profile, User License: Salesforce, Custom: (checkbox)
  - Action: Edit | Clone, Profile Name: Customer Community Login User, User License: Customer Community Login, Custom: (checkbox)
  - Action: Edit | Clone, Profile Name: Customer Community Plus Login User, User License: Customer Community Plus Login, Custom: (checkbox)
  - Action: Edit | Clone, Profile Name: Customer Community Plus User, User License: Customer Community Plus, Custom: (checkbox)
- Page Bottom:** Page 1 of 2, Weather: 25°C Partly sunny, System Status: ENG IN, Date: 01-10-2023, Time: 08:20 AM

## Step 2:

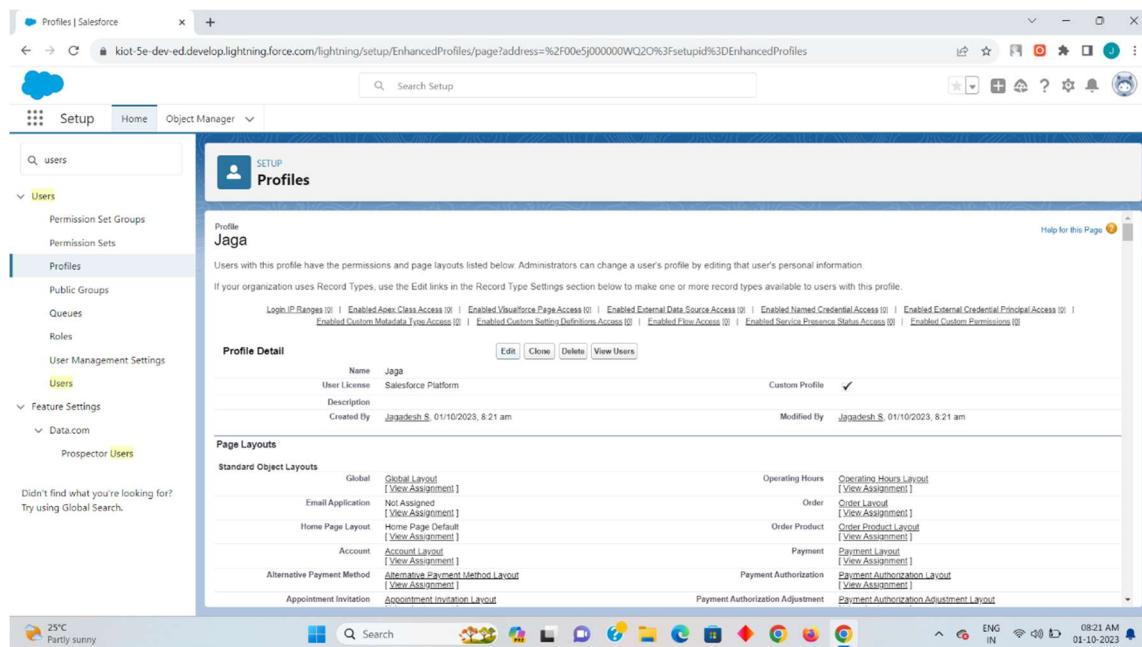
Click on the new to create a new profile along with the label and Api



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

## Step 3:

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



Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3Fr?url%3D%252f00e5j00000WQ2O%253Fsetupid...

Setup Home Object Manager

Search Setup

SETUP Profiles

Communication Subscription Consents

Communication Subscription Timings

Contacts

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Locations

Party Consents

Push Topics

Sellers

Streaming Channels

User External Credentials

Custom Object Permissions

Basic Access Data Administration

Read Create Edit Delete View All Modify All

Providers Resources

Session Settings

Session Times Out After 2 hours of inactivity

Session Security Level Required at Login -None-

Enable different Experience Cloud login policies for employees.

Separate Experience Cloud site and Salesforce login authentication for employees.

Relax login IP restrictions

Skip employee device activation during Experience Cloud site login

25°C Partly sunny

ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3Fr?url%3D%252f00e5j00000WQ2O%253Fsetupid...

Setup Home Object Manager

Search Setup

SETUP Profiles

Communication Subscription Consents

Communication Subscription Timings

Contacts

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Locations

Party Consents

Push Topics

Sellers

Streaming Channels

User External Credentials

Custom Object Permissions

Basic Access Data Administration

Read Create Edit Delete View All Modify All

Providers Resources

Session Settings

Session Times Out After 2 hours of inactivity

Session Security Level Required at Login -None-

Enable different Experience Cloud login policies for employees.

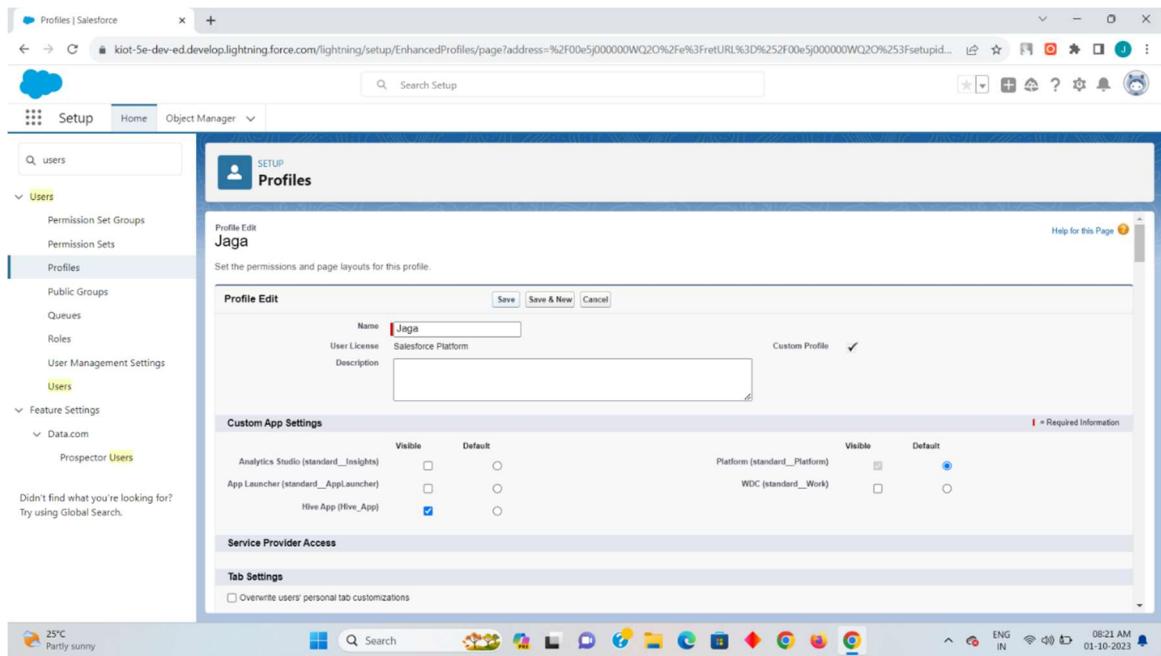
Separate Experience Cloud site and Salesforce login authentication for employees.

Relax login IP restrictions

Skip employee device activation during Experience Cloud site login

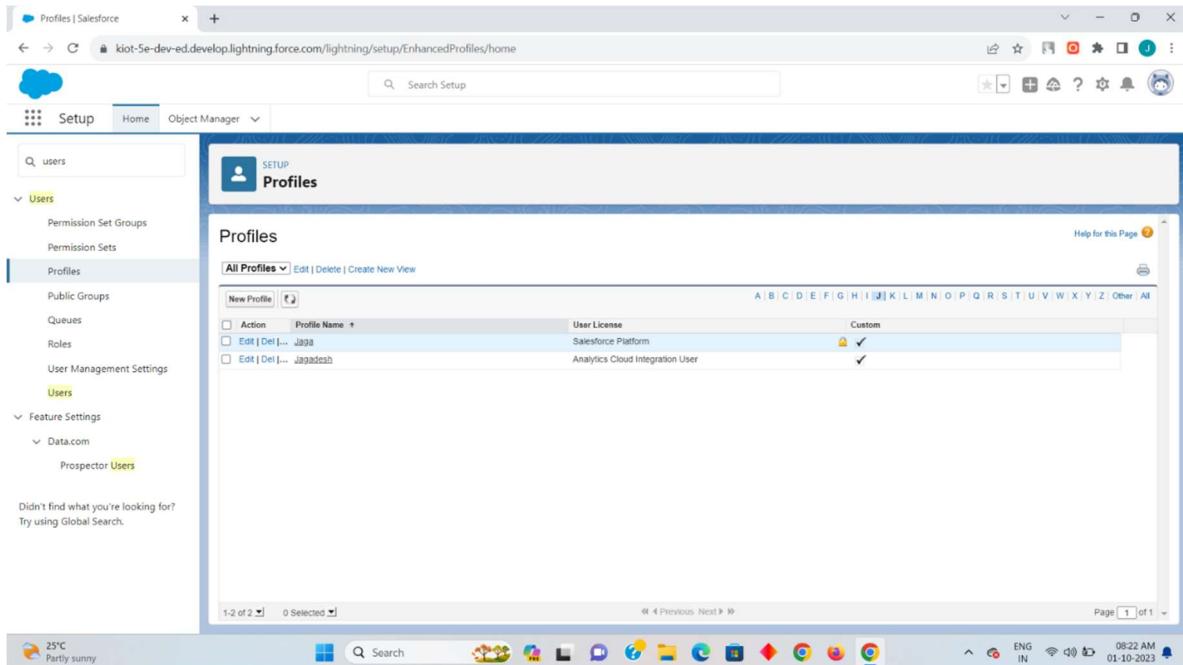
25°C Partly sunny

ENG IN 08:21 AM 01-10-2023



## Step 4

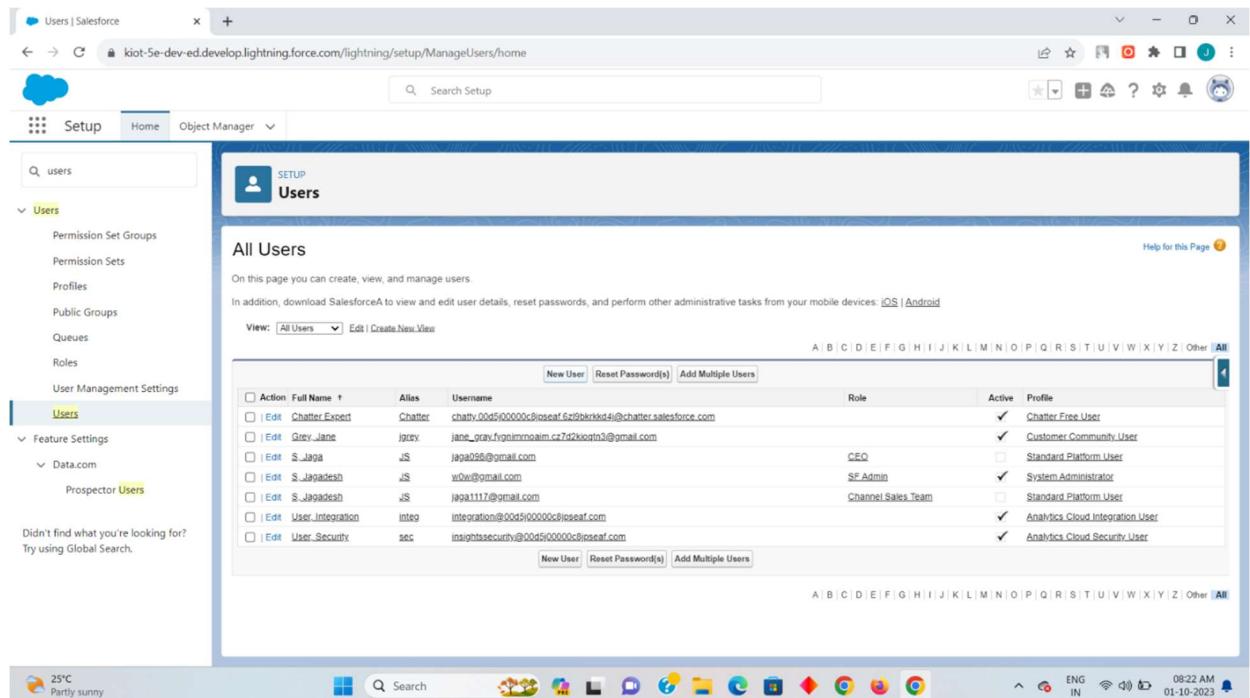
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it



## Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along

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



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar navigation includes Home, Object Manager, and a search bar. Under the 'Users' section, there are links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a specific 'Users' link which is highlighted. Below the sidebar, a message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'All Users' and displays a table of users. The columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, each with a unique profile assigned:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expired	Chatter	chatty.00d500000c8joseaf.6z9krkhd4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit Jane	Jane	jane_gray_fygnmmpoam.c27d2koqtn3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	Edit S.Jaga	JS	jaga098@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit S.Jagadesh	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit S.Jagadesh	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit User_Integration	Integ	integration@00d500000d@seaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit User_Security	sec	insightssecurity@00d500000c@seaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

At the bottom of the table are buttons for New User, Reset Password(s), and Add Multiple Users. The footer of the browser window shows the URL 'kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home', the date '01-10-2023', and the time '08:22 AM'. The system status bar indicates '25°C Partly sunny'.

Users | Salesforce

Setup Home Object Manager

Q Search Setup

Users

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

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

25°C Partly sunny

New User

User Edit Save Save & New Cancel

General Information

First Name	Jagadesh11	Role	Director, Channel Sales
Last Name	S	User License	Salesforce Platform
Alias	J	Profile	-None-
Email	jwv123@gmail.com	Active	-None-
Username	jwv123@gmail.com	Marketing User	Jaga Standard Platform User
Nickname	User169612875144962592	Office User	
Title		Knowledge User	
Company		Flow User	
Department		Service Cloud User	
Division		Site.com Contributor User	

Office User  
Knowledge User  
Flow User  
Service Cloud User  
Site.com Contributor User  
Site.com Publisher User  
WDC User  
Data.com User Type  
Data.com Monthly Addition Limit  
Accessibility Mode (Classic Only)  
High-Contrast Palette on Charts

Help for this Page

08:23 AM 01-10-2023 ENG IN

Users | Salesforce

Setup Home Object Manager

Q Search Setup

Users

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

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

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New User

User Edit Save Save & New Cancel

General Information

First Name	Jagadesh22	Role	Marketing Team
Last Name	S	User License	Salesforce Platform
Alias	J	Profile	-None-
Email	jwv1@gmail.com	Active	-None-
Username	jwv1@gmail.com	Marketing User	Jaga Standard Platform User
Nickname	User16961287993618745	Office User	
Title		Knowledge User	
Company		Flow User	
Department		Service Cloud User	
Division		Site.com Contributor User	

Office User  
Knowledge User  
Flow User  
Service Cloud User  
Site.com Contributor User  
Site.com Publisher User  
WDC User  
Data.com User Type  
Data.com Monthly Addition Limit  
Accessibility Mode (Classic Only)  
High-Contrast Palette on Charts

Help for this Page

08:23 AM 01-10-2023 ENG IN

Users | Salesforce

Setup Home Object Manager

Q Search Setup

Users

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

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

25°C Partly sunny

All Users

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

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

View: All Users Edit Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit S.Jaga	s2	jwv000@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit S.Jagadeesh	s2	w00@gmail.com	SP Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit S.Jagadeesh	s2	jwq111@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	Edit S.Jagadeesh11	s2	jwv123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	Edit S.Jagadeesh22	s2	jwv000@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Marketing Team

New User Reset Password(s) Add Multiple Users

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

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

Help for this Page

08:24 AM 01-10-2023 ENG IN

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

## Step 6:

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

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

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

Permission Sets

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

All Permission Sets | [Edit](#) | [Delete](#) | [Create New View](#)

New [New](#) [Clone](#)

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

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

1-25 of 30 | 0 Selected | [New](#) [Clone](#) | [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) | [Other](#) | [All](#)

Page | 1 of 2

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

25°C Partly sunny

Search

Help for this Page

ENG IN 06:24 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

Permission Sets

Create

Enter permission set information

Label:  API Name:  Description:   
Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

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

25°C Partly sunny

Search

Help for this Page

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

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https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5j000008Pgta%3FsfdclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

SETUP Permission Sets

Permission Set permission12

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

Description:   
License:  Session Activation Required:   
Last Modified By: Jagadish S. 01/10/2023, 8:24 am API Name: permission12 Namespace Prefix:   
Created By: Jagadish S. 01/10/2023, 8:24 am Video Tutorial | Help for this Page

Permission Set Overview

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

Apps

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Permission Sets | Salesforce

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5j000008Pgta%3DsfdclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

SETUP Permission Sets

Permission Set permission12

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

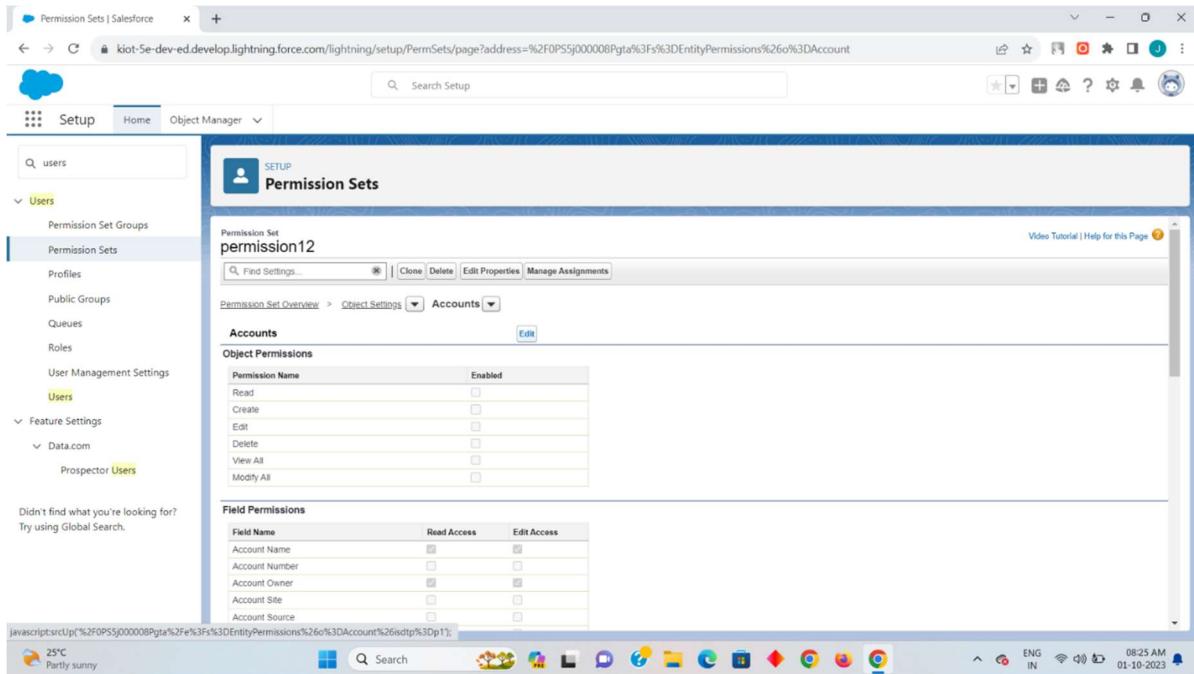
Permission Set Overview > Object Settings

Object Settings

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

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ENG IN 08:25 AM 01-10-2023



## Step 7:

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

The screenshots show the Salesforce Setup interface for creating a new Permission Set named 'permission12'. The left screenshot shows the initial configuration with the 'Edit' button highlighted. The right screenshot shows the 'Edit' button clicked, revealing checkboxes for 'Read', 'Create', 'Edit', and 'Delete' permissions under the 'Object Permissions' section.

Permission Name	Enabled
Read	<input 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"/>

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

## Step 8

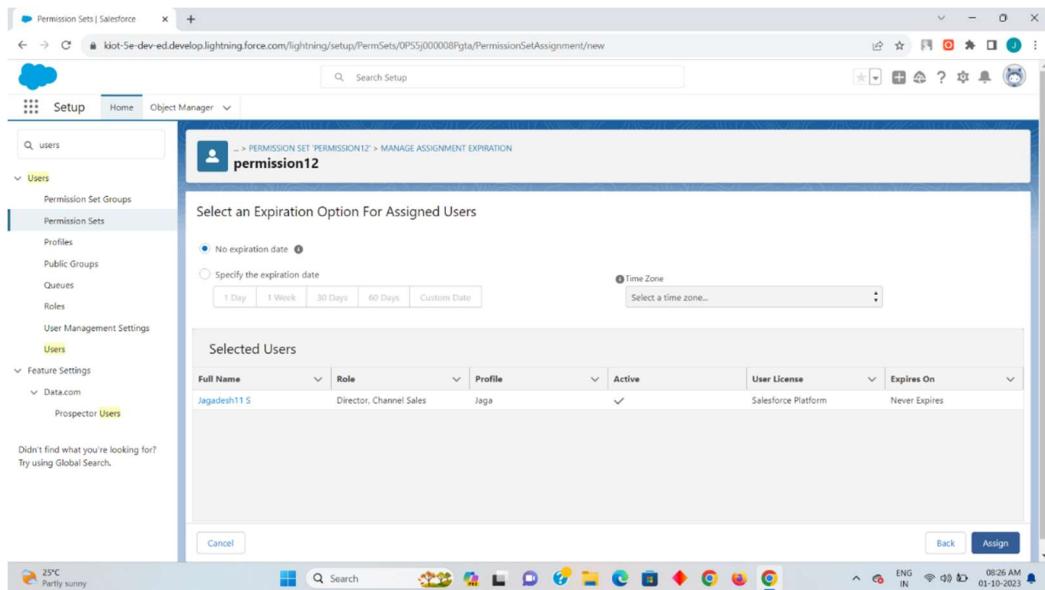
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.

The screenshot shows the 'Permission Sets | Salesforce' page. The URL is [kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/OP5\\$000008PgtA/PermissionSetAssignment/home](https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/OP5$000008PgtA/PermissionSetAssignment/home). The page title is 'permission12'. The left sidebar shows 'Users' selected under 'Permission Sets'. The main content area is titled 'Current Assignments' with a sub-header 'No assignments defined.' There is a decorative illustration of a cactus and sun.

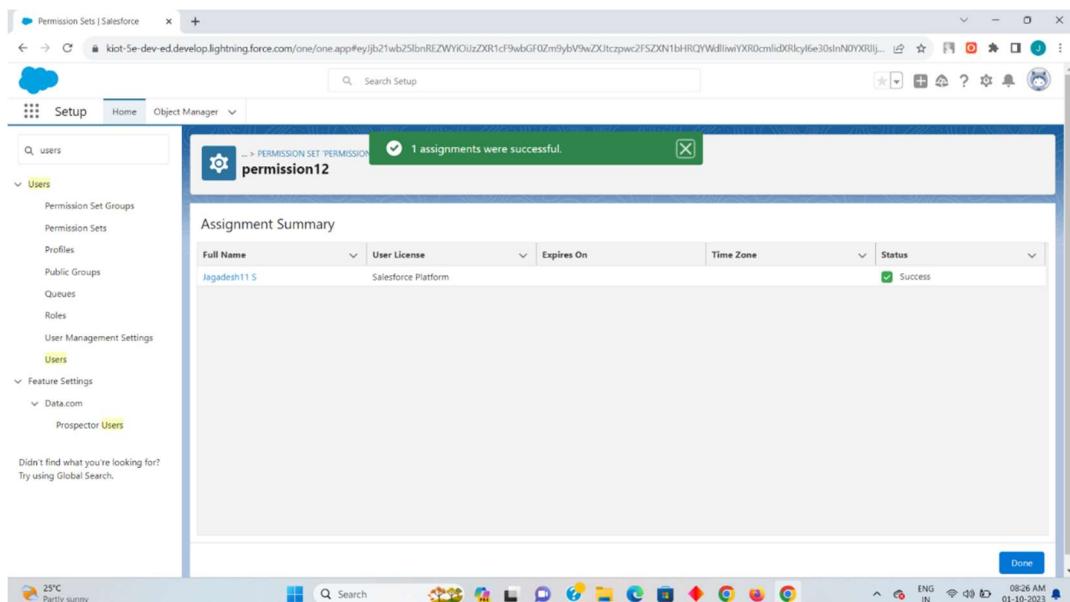
The screenshot shows the 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog. The URL is [kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/OP5\\$000008PgtA/PermissionSetAssignment/new](https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/OP5$000008PgtA/PermissionSetAssignment/new). The title bar says 'permission12'. The left sidebar shows 'Users' selected under 'Permission Sets'. The main content is 'Select Users to Assign' with a search bar showing 'jagadesh'. A tooltip says 'Role, Alias, and Profile aren't searchable. Use filters or sort on these fields instead.' Below the search bar is a table with columns: Full Name, Alias, Username, Role, Active, and Profile. It lists four users: Jagadesh S, Jagadesh S, Jagadesh11 S, and Jagadesh22 S. The 'Active' column has checkboxes for SF Admin, Channel Sales Team, Director, Channel Sales, and Marketing Team respectively. The 'Profile' column shows System Administrator, Standard Platform User, Jaga, and Jaga.

The screenshot shows the same 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog. The URL is [kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/OP5\\$000008PgtA/PermissionSetAssignment/new](https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/OP5$000008PgtA/PermissionSetAssignment/new). The title bar says 'permission12'. The left sidebar shows 'Users' selected under 'Permission Sets'. The main content is 'Select Users to Assign' with a search bar showing 'jagadesh'. A tooltip says 'Role, Alias, and Profile aren't searchable. Use filters or sort on these fields instead.' Below the search bar is a table with columns: Full Name, Alias, Username, Role, Active, and Profile. It lists four users: Jagadesh S, Jagadesh S, Jagadesh11 S, and Jagadesh22 S. The 'Active' column has checkboxes for SF Admin, Channel Sales Team, Director, Channel Sales, and Marketing Team respectively. The 'Profile' column shows System Administrator, Standard Platform User, Jaga, and Jaga. In this screenshot, the checkbox for 'Jagadesh11 S' is checked.

Click on next.



Now click on Assign.



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

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

Solution:

Step 1: Create a Custom Object

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

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

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

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

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

The screenshot shows the Salesforce Email Template page for 'Thank You Email - Survey'. The page has a header with 'Email Template' and the template name. It includes tabs for 'Details' and 'Related', and buttons for 'Edit in Builder', 'Edit', and 'Clone'. The 'Information' section contains fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Related Entity Type' (set to 'Survey Result'), 'Description', 'Folder' (set to 'Public Email Templates'), and a checkbox for 'Made in Email Template Builder' which is checked. The 'Message Content' section includes a 'Subject' field with 'Thank You For Completing Our Survey!' and an 'Enhanced Letterhead' field. The 'HTML Value' field contains the following content:

```
Hi {{Survey_Result__c.Name__c}},  
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
```

The 'Additional Information' section shows 'Created By' as Rakesh Gupta, 'Created Date' as 12/21/2020, 4:23 PM, and 'Last Modified By' as Rakesh Gupta, 'Last Modified Date' as 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.**

Survey - Thank You Email

Description: Survey - Thank You Email

Unique Name: Survey\_Thank\_You\_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for: Find

Recipients	Available Recipients	Selected Recipients
	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email
	Add Remove	

You can enter up to five (5) email addresses to be notified.

Additional Emails

From Email Address: Current User's email address

Make this address the default From email address for this object's email alerts.

**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: Save Response \* API Name: Save\_Response

Description:

How Many Records to Create:
  One
  Multiple

How to Set the Record Fields:
  Use all values from a record
  Use separate resources, and literal values

Create a Record of This Object:
 \* Object: Survey Result

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text" value="A_a Comment X"/>
Email__c	<input type="text" value="A_a Email &gt; Value X"/>
Name__c	<input type="text" value="(!Name.firstName) {!Name.lastName}"/>
Rating__c	<input type="text" value="A_a Rating X"/>

+ Add Field

Manually assign variables

Cancel 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.

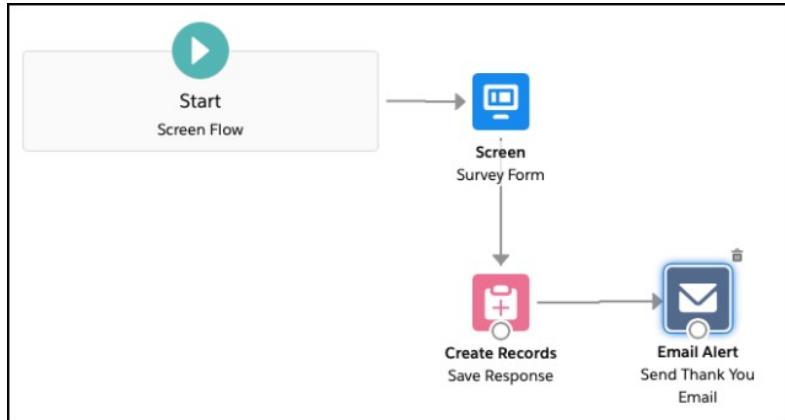
Edit "Survey - Thank You Email" email alert

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

*Label	*API Name
Send Thank You Email	Send_Thank_You_Email
Description	
Set Input Values	
Aa * Record ID (!Save_Response)	

Cancel Done

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



### 1. Click Save.

2. Enter Flow Label the API Name will auto-populate.

3. Click Show Advanced.

## **4. How to Run the Flow: User or System Context—Depends on How Flow is Launched**

**5. Type: Screen Flow**

**6. API Version for Running the Flow: 51**

**7. Interview Label: Survey**

**{!\$Flow.CurrentDateTime}**

**8. Click Save.**

Save as

**A New Version** **A New Flow**

\* Flow Label **Survey** \* Flow API Name **Survey**

Description

Hide Advanced

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

\* Type **Screen Flow**

\* API Version for Running the Flow **51**

Interview Label **Survey {!\$Flow.CurrentDateTime}**

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

Status: **Active** Type: **Screen Flow** Version Number: **2**

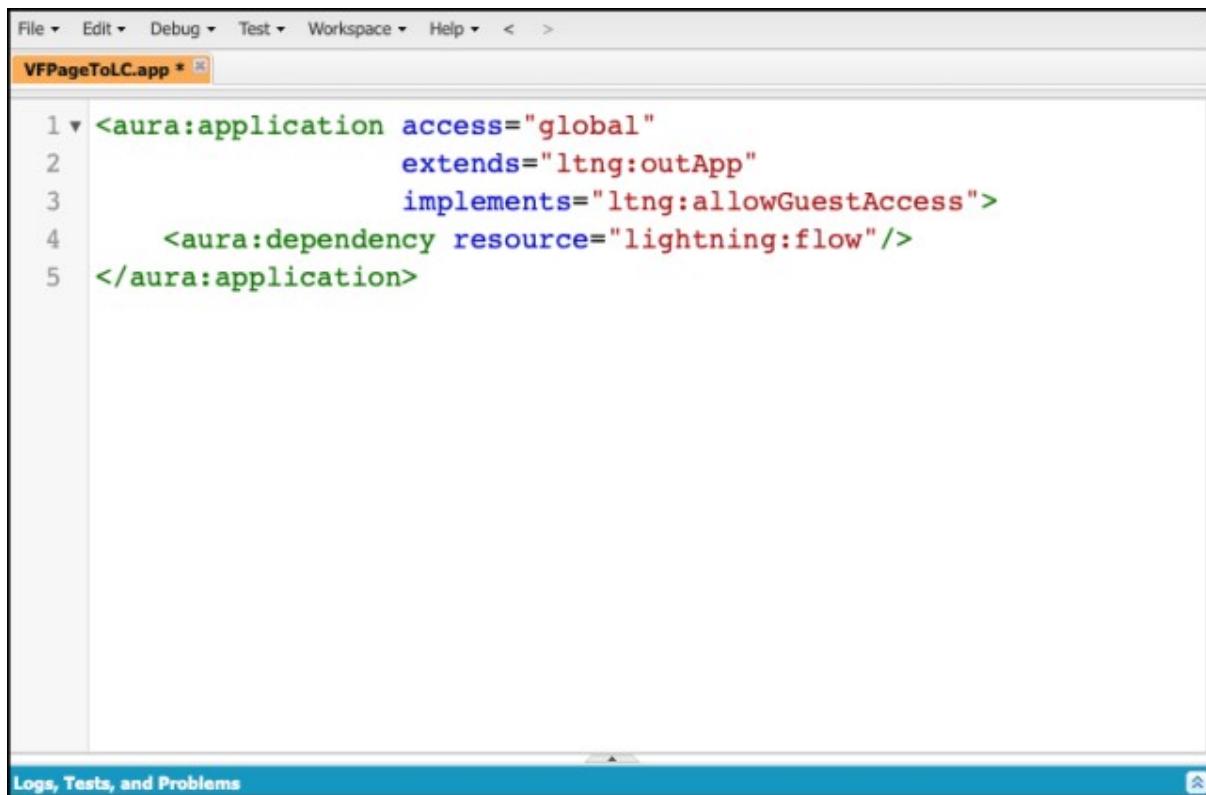
**Cancel** **Save**

The screenshot shows the 'Save as' dialog for creating a new flow. The 'A New Version' button is highlighted. The flow is named 'Survey' with an API name of 'Survey'. The 'How to Run the Flow' setting is 'User or System Context—Depends on How Flow is Launched'. The flow type is 'Screen Flow' and the API version is '51'. The interview label is set to the formula '{!\$Flow.CurrentDateTime}'. The status is 'Active', the type is 'Screen Flow', and the version number is '2'. The 'Save' button is visible at the bottom right.

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

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

1. Click **Setup | Developer Console**
2. Navigate to **File | New | Lightning Application**
3. Enter a **Name (VFPageToLC)** field, make sure to select the **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. The top menu bar includes File, Edit, Debug, Test, Workspace, Help, and navigation icons. A tab labeled "VFPageToLC.app \*" is active. The main editor area contains the following code:

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

The code defines a Lightning Application named "VFPageToLC.app" with attributes for access, extension, implementation, and a dependency on the "lightning:flow" component.

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

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

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

# component on the page using `$Lightning.createComponent()`

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

The screenshot shows the 'Visualforce Page Survey' setup screen. The 'Page Information' section has 'Label' set to 'Survey' and 'Name' set to 'Survey'. Under 'Available for Lightning Experience, Experience Builder sites, and the mobile app', the 'Use apex:includeLightning' checkbox is checked. The 'Visualforce Markup' tab is selected, showing the following code:

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

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

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

1. Click **Setup**.

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

**Site Edit**

**Save** **Cancel**

Site Label	Survey	
Site Name	Survey	
Site Description	   	
Site Contact	Rakesh Gupta	
Default Record Owner	Rakesh Gupta	
Default Web Address	http://kathiarch-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	   	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	
Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/>	
Lightning Features for Guest Users	<input checked="" type="checkbox"/>	
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  
[REDACTED]

\*Rating  
5

\*Comment  
Awesome Blog 

**Next**

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

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

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

8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,  
Automation Champion