

Naan Mudhalvan  
Salesforce Developer(Course)  
Assignment no 1

Name : Nithiya S  
Naan Mudhalvan id : au611220104046  
Year & Dep : 4<sup>th</sup> year & CSE  
Batch : 2024  
Zone no : Zone 8

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

Solution:

Step 1: Create Custom Objects

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

Setup

Home

Object Manager

Search Setup

Setup

New Custom Object

Help for this Page

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

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

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

Object Name  Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page

Container Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key tabs, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

Base Type

Optional Features

☐ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing

Object Classification

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

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

What is this?

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

☐ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

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

**Setup** | Home | Object Manager

## Object Manager

### New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Get the manual](#) [Customize the message layout](#)

**Custom Object Definition Edit** | Save | Save & New | Cancel

**Custom Object Information** | Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label:  Example: Account  
 Plural Label:  Example: Accounts  
 Starts with vowel sound: ☐

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

Object Name:  Example: Account  
 Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page  
 Context Name:

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key tabs, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:  Example: Account Name  
 Base Type:

**Optional Features**

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

**Object Classification**

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

☒ Allow Sharing  
☒ Allow Bulk API Access  
☒ Allow Streaming API Access

**Deployment Status** | What is this?

☐ In Development  
☒ Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

☐ Allow Search

**Object Creation Options (Available only when custom object is first created)**

☐ Add Notes and Attachments related list to default page layout  
☐ Launch New Custom Tab Wizard after saving this custom object

Save | Save & New | Cancel

## Step 2: Create a Master-Detail Relationship

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

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

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

SETUP > OBJECT MANAGER  
CDepartment

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

Details

Description

API Name

CDepartment\_\_c

Custom

✓

Singular Label

CDepartment

Plural Label

CDepartments

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit Delete

SETUP > OBJECT MANAGER  
CDepartment

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

CDepartment  
New Relationship

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

Help for this Page

Step 3 of 6

Previous Next Cancel

Field Label collage

Field Name collage

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.

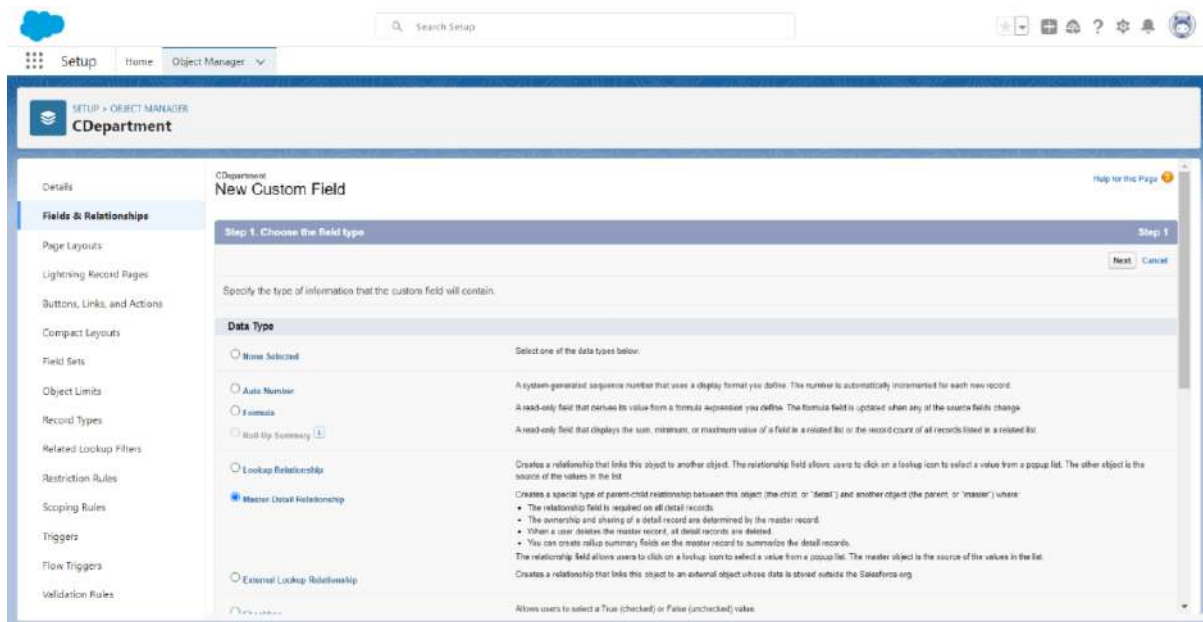
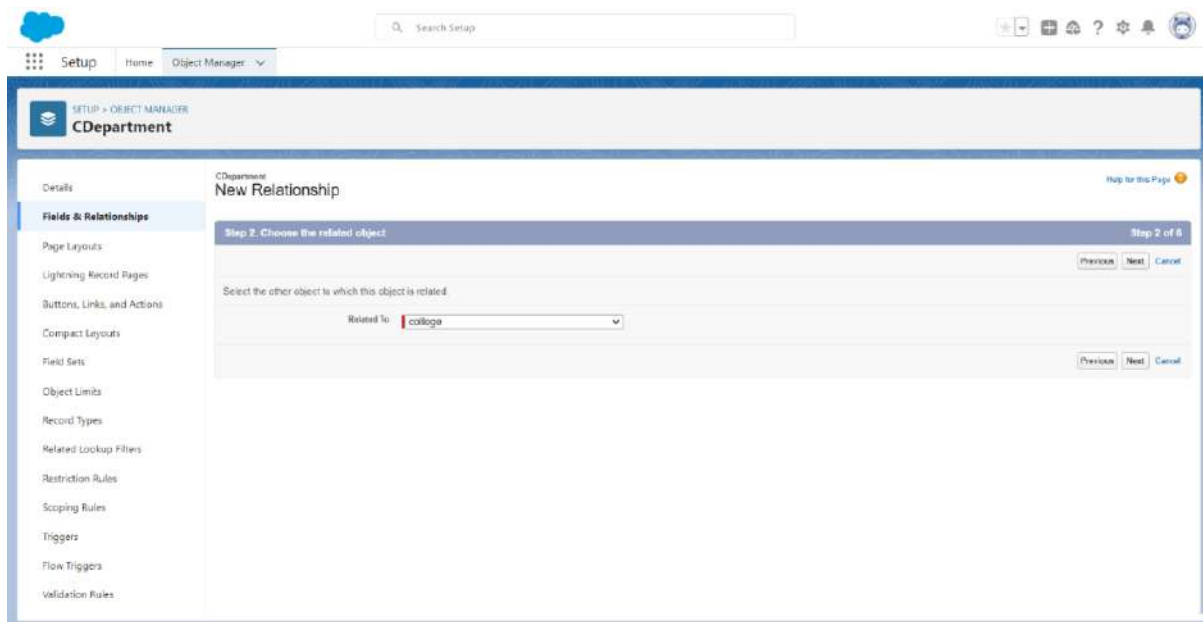
Allow reparenting

☐ 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 entity.

Lookup Filter

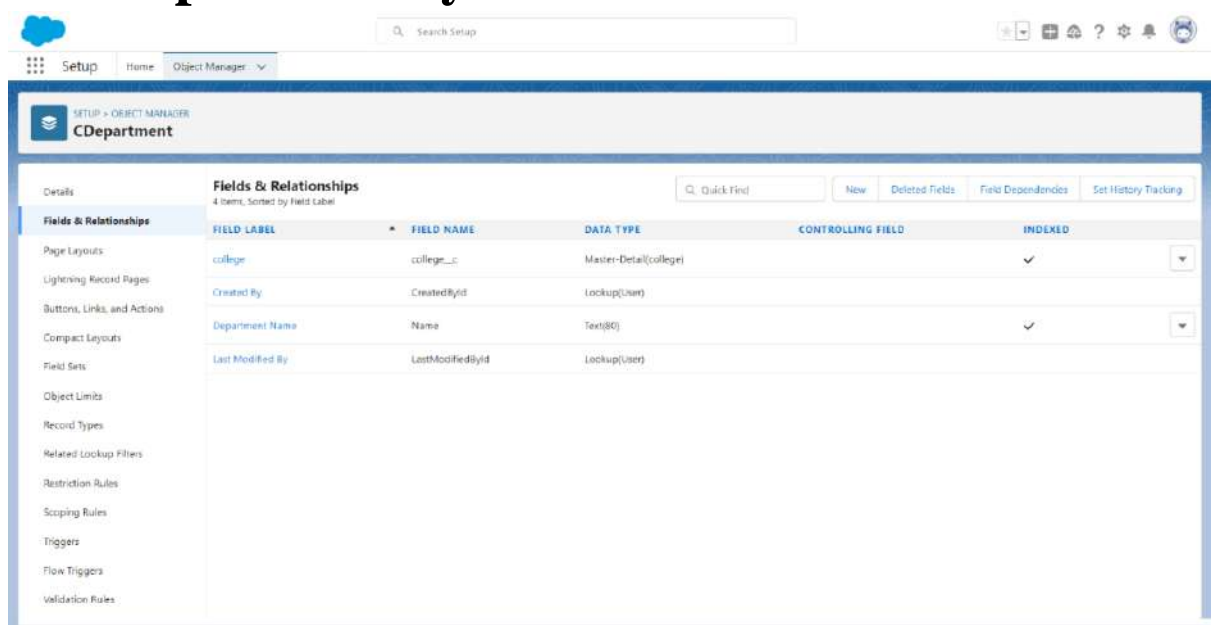


**Step 3: Create the Roll-Up Summary Field**

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

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

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





Setup

Home

Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Tab

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

SETUP

Tabs

Help for this Page

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

New What Is This?

Action	Label	Tab Style	Description
Edit   Del	Book1	Book	
Edit   Del	Research Proposal	Research	
Edit   Del	Student	Student	

Web Tabs

New What Is This?

No Web Tabs have been defined.

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined.

Lightning Component Tabs

New What Is This?

No Lightning component tabs have been defined.

Lightning Page Tabs

New What Is This?

No Lightning Page Tabs have been defined.

Setup

Home

Object Manager

Search Setup

college

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

Object Manager

college

New Custom Field

Help for this Page

Step 5: Add to page layouts

Step 5 of 5

Previous Save & New Save Cancel

Field Label	Total count
Data Type	Roll-up Summary
Field Name	Total count
Description	
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.	
To change the location of this field on the page, you will need to customize the page layout.	
<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	college Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.	

Previous Save & New Save Cancel

cloud

colle

SetupHomeObject Manager

college

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

New Custom Field

Step 4. Establish field-level security

Step 4 of 5

Field Label: Total count

Data Type: Roll-Up Summary

Field Name: Total\_count

Description:

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

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

cloud

colle

SetupHomeObject Manager

college

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

New Custom Field

Step 3. Define the summary calculation

Step 3 of 5

Select Object to Summarize

Master Object: college

Summarized Object: CDepartments

Select Roll-Up Type

COUNT

SUM

MIN

MAX

Field to Aggregate: Department

Filter Criteria

All records should be included in the calculation

Only records meeting certain criteria should be included in the calculation

cloud

college

SetupHomeObject Manager

college

Setup > OBJECT MANAGER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 2: Enter the details

Step 2 of 5

PreviousNextCancel

Field Label

Total count

Field Name

total\_count

Description

Help Text

Auto add to custom report type

☒ Add this field to existing custom report types that contain this entity

PreviousNextCancel

cloud

college

SetupHomeObject Manager

college

Setup > OBJECT MANAGER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 1: Choose the field type

Step 1

NextCancel

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

Data Type

☐ None Selected

Select one of the data types below.

☐ Auto Number

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

☐ Formula

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

☒ Roll-Up Summary

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

☐ Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ Master-Detail Relationship

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

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

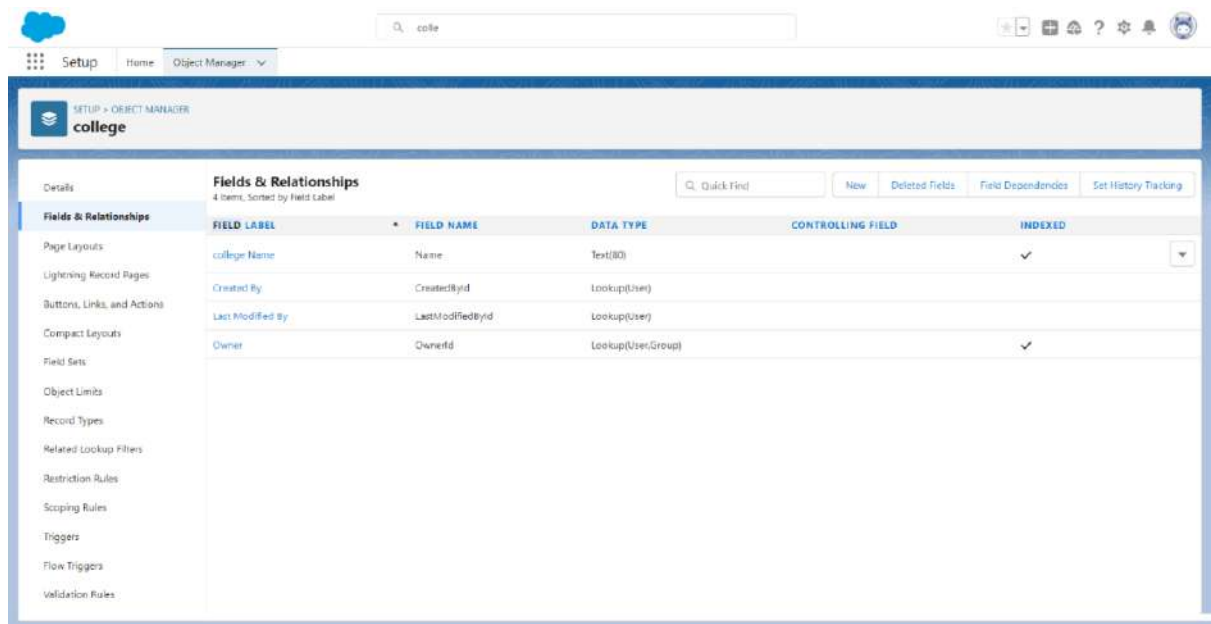
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ External Lookup Relationship

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

☐ Picklist

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



## Step 4: Create a Lightning App

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

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

Setup Home Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

tabs

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

Setup Tabs

New Custom Object Tab

Step 2: Add to Profiles

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

☒ Apply one tab visibility to all profiles (Default On) ☐ Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Cloud Kicks Admin	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom Marketing Profile	Default On
Custom Sales Profile	Default On
Custom Support Profile	Default On
Customer	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On
Customer Portal Manager Custom	Default On
Customer Portal Manager Standard	Default On
External App 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
Planner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Research Manager	Default On
Research Users	Default On
Salesforce API Only System Integrations	Default On
Sales User	Default On
security profile	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

Previous Next Cancel

Setup

Home

Object Manager

Search Setup

tabs

Setup

Tabs

Help for this Page

Step 1 of 3

Step 1: Enter the Details

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

Select an existing custom object or create a new custom object now

Object: college

Tab Style: new

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.  
Splash Page Custom Link: None

Enter a short description:  
Description:

Next Cancel

Setup

Home

Object Manager

Search Setup

tabs

Setup

Tabs

Help for this Page

Step 3 of 3

Step 3: Add to Custom Apps

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

Custom App	Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Site)	<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"/>
Bot Solutions (standard__LightningBot)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

Previous Save Cancel

Setup

Home

Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

tabs

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

SETUP

Tabs

New Custom Object Tab

Help for this Page

Step 1: Enter the Details

Step 1 of 3

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

Select an existing custom object or create a new custom object here.

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--

Enter a short description.  
Description:

Next Cancel

Setup

Home

Object Manager

Search Setup

app

Salesforce Mobile App

Date

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Packaging

Installed Packages

SETUP

Lightning Experience App Manager

New Lightning App

New Connected App

20 items • Sorted by App Name • Filtered by All app namespaces • TabSet Type

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

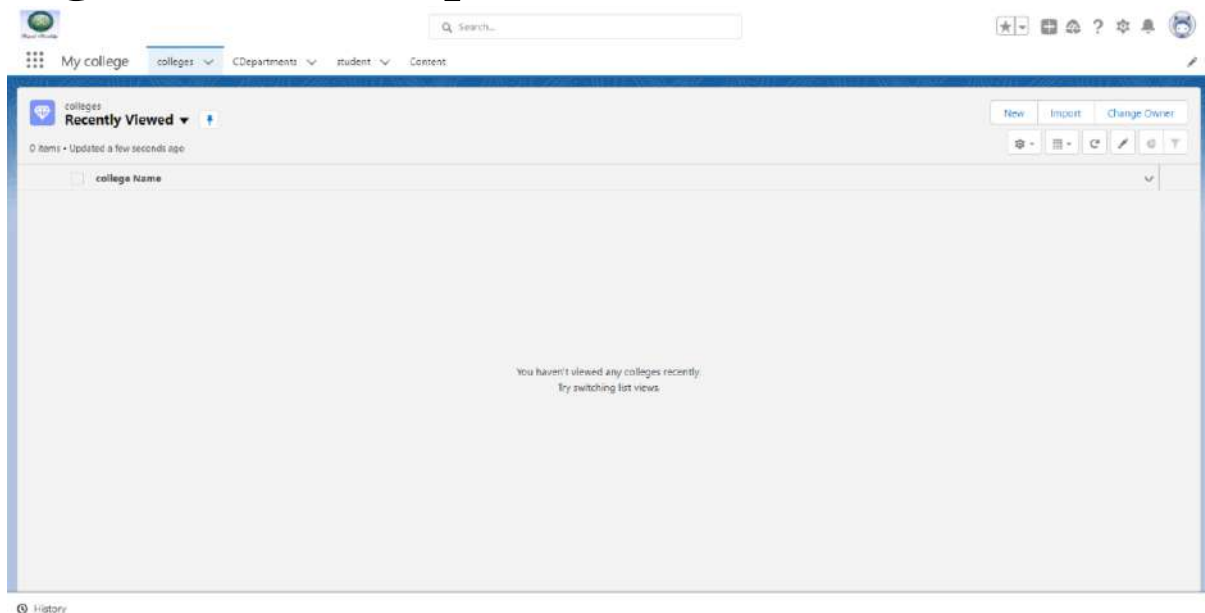


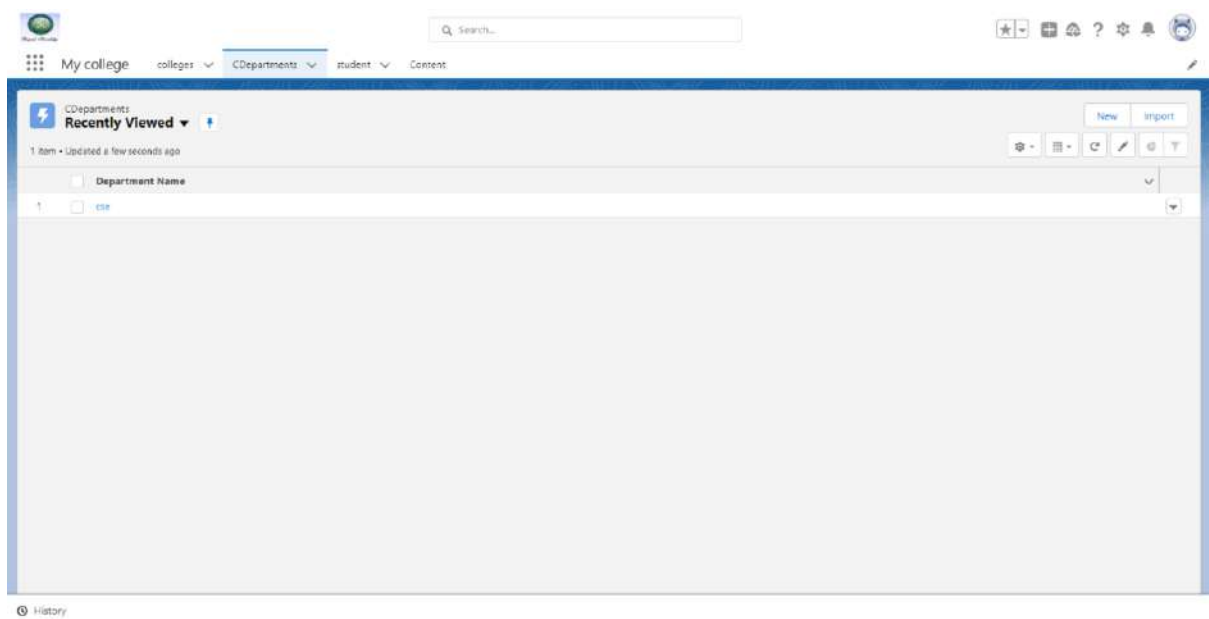
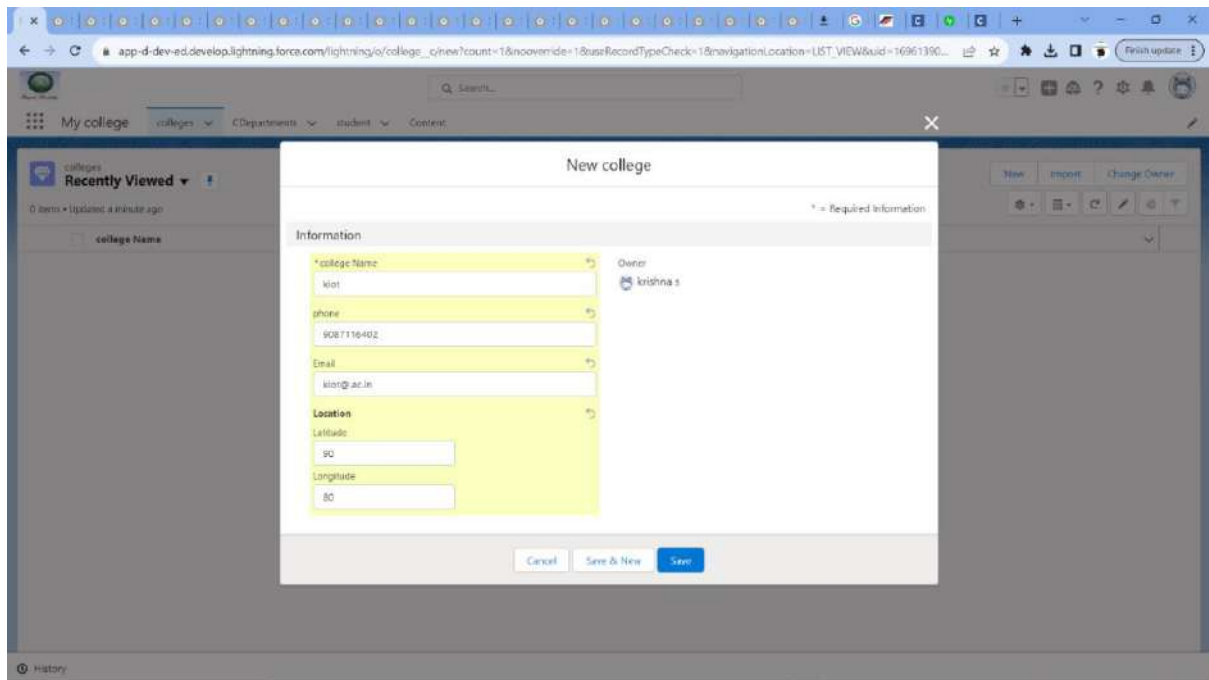


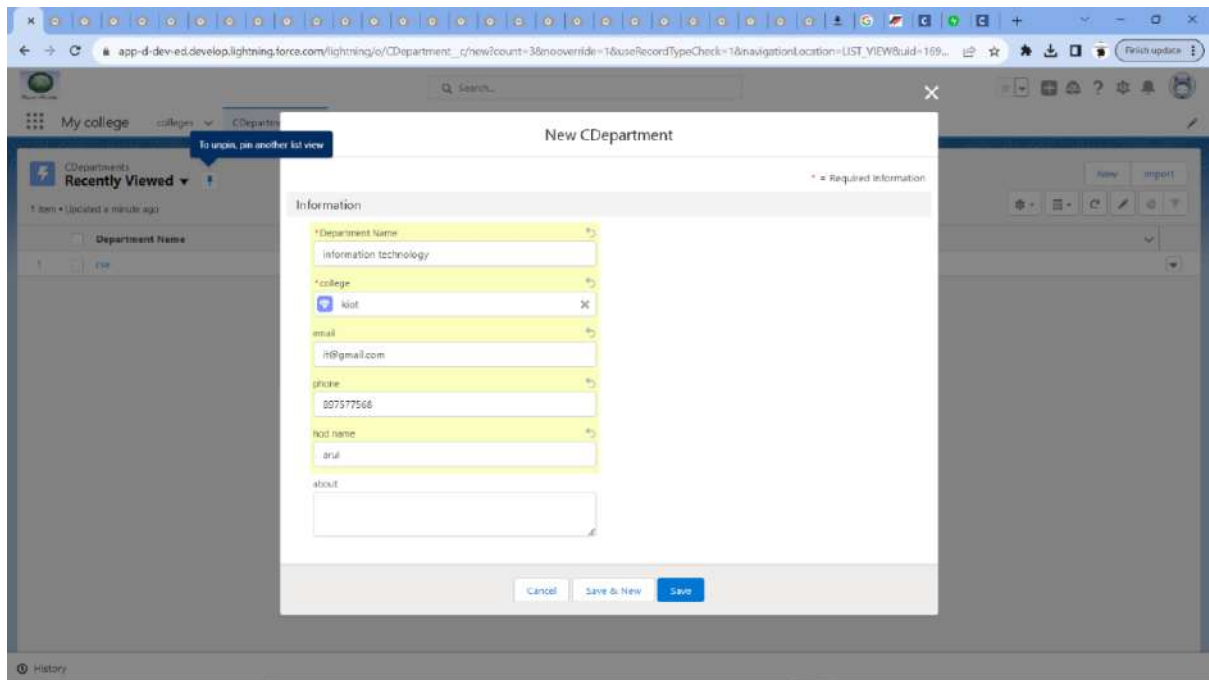
## Conclusion:

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.







My college

colleges

CDepartments

student

Content

Search...

Star

Grid

Home

Help

Settings

Notifications

Profile

CDepartment

Information technology

New Contact

Edit

New Opportunity

Related

Details

Department Name

information technology

college

klot

email

it@gmail.com

phone

957577568

nod name

anul

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

CDepartments

student

Content

Search...

Star

Grid

Home

Help

Settings

Notifications

Profile

college

klot

New Contact

Edit

New Opportunity

Related

Details

college Name

klot

Total count

1

phone

9667116402

email

klot@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

Owner

krishna.s

History

My college

colleges

CDepartments

student

Content

Search...

Star

Grid

Home

Help

Settings

Notifications

Profile

CDepartments

Recently Viewed

New

Import

1 item • Updated a few seconds ago

Department Name

1

edit

History

My college

colleges

CDepartments

student

Content

Search...

★

📄

🏠

?

⚙️

🔔

👤

colleges

Recently Viewed

New Import Change Owner

1 item • Updated a few seconds ago

college Name

1

kiot

History

My college

colleges

CDepartments

student

Content

Search...

★

📄

🏠

?

⚙️

🔔

👤

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, 11:15 am

Owner

krishna.s.

Last Modified By

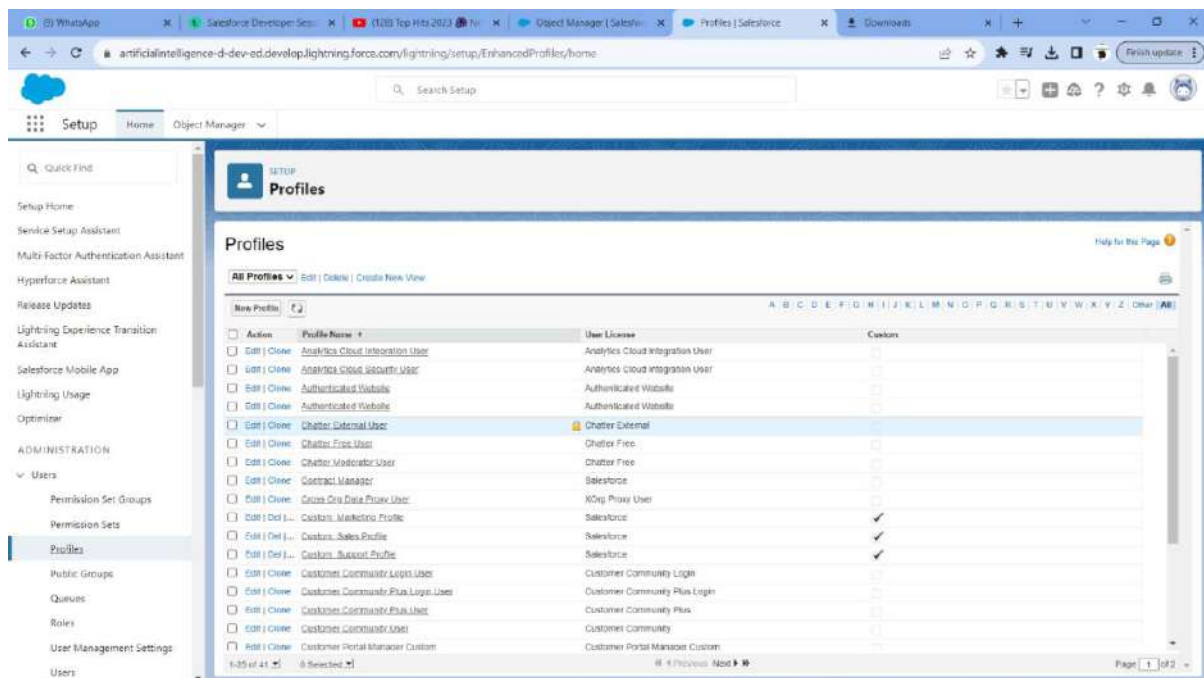
krishna.s. 01/10/2023, 11:19 am

History

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

Solution:

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



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

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

### SETUP Profiles

Profiles

AB Profiles | Edit | Delete | Create New View

New Profile

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

1-7 of 7 | 0 Selected | 47 Profiles, Most Recent

Page 1 of 1

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F\_u%2Fperm%2Fu%2Fprofile%2FprofilesClone%2F&...

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

### SETUP Profiles

#### Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard Platform User

User License: Salesforce Platform

Profile Name:

Save Cancel

WhatsApp | Salesforce Developer | 100 Top Hits 2022 | Object Manager | Profiles | Downloads

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F\_u%2Fperms%2Fu%2Fprofile%2FProfileClone%2F...

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

WhatsApp | Salesforce Developer | 100 Top Hits 2022 | Object Manager | Profiles | Downloads

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WGBz%3Fsetupid%3DEnhancedProfiles

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.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Settings Definition Access (0) | Enabled Flow Access (0) | Enabled Service Resource Status Access (0) | Enabled Custom Permissions (0)

**Profile Detail** Edit Clone Delete View Users

Name	Manager	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	GGPALS	Modified By	GGPALS
Created	01/10/2020, 7:05 pm	Modified	01/10/2020, 7:05 pm

**Page Layouts**

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



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

Queries

Roles

User Management Settings

Users

### Profiles

Manager

Set the permissions and page layouts for this profile

**Profile Edit**

Name:  Save Save & New Cancel

User License:  Custom Profile: ☒

Description:

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

☐ Override users' personal tab customizations

**Standard Tab Settings**

	Name	Default On	Learning	Libraries	Lightning Bulk Solutions
Accounts	<input checked="" type="checkbox"/>	Default On	Default On	Tab Hidden	Default On
Alert Settings	<input checked="" type="checkbox"/>	Default On			

### Profiles

Communication Subscription Channel Types

	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Testings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Custom Object Permissions**

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

**Session Settings**

Session Times Out After:

Session Security Level Required at Login:

**Password Policies**

User passwords expire in:

Enforce password history:

Minimum password length:

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2Fen%3FretURL%3D%252F00e5j0...

Setup

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

### Profiles

	Basic Access					Data Administration		Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All	
Contact Point Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

#### Custom Object Permissions

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

#### Session Settings

Session Times Out After:

Session Security Level Required at Login:

#### Password Policies

User passwords expire in:

Enforce password history:

Minimum password length:

Password complexity requirement:

Password question requirement:

Maximum invalid login attempts:

Lockout effective period:

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2Fen%3FretURL%3D%252F00e5j0...

Setup

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

### Profiles

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

#### Session Settings

Session Times Out After:

Session Security Level Required at Login:

#### Password Policies

User passwords expire in:

Enforce password history:

Minimum password length:

Password complexity requirement:

Password question requirement:

Maximum invalid login attempts:

Lockout effective period:

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

The screenshot displays the Salesforce Setup interface for the 'Profiles' section. The left-hand navigation pane includes links to various setup tools and administrative areas. The main content area is titled 'Profiles' and features a 'Custom Object Permissions' section. This section contains two tables, one for the 'Dark' object and one for the 'Enhancement Requests' object. Each table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The 'Dark' object permissions are mostly checked, while the 'Enhancement Requests' object has only 'Read' and 'Create' permissions checked. Below the permissions section are 'Session Settings' and 'Password Policies'. The 'Session Settings' include a 'Session Timeout' of 2 hours and a 'Session Security Level' of 'None'. The 'Password Policies' section includes settings for password expiration (90 days), history (3 passwords remembered), minimum length (8), complexity (must include alpha and numeric characters), password questions (cannot contain password), maximum failed login attempts (10), and lockout effective period (15 minutes). There are also checkboxes for obscuring secret answers, requiring a minimum 1-day password lifetime, and disabling immediately expired links.

WhatsApp | Salesforce Developer | 1020 Top Hits 2023 | Object Manager | Users | Salesforce | Downloads

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2F%3FFeedURL%3D%252F005%253F%2FUserEntityOv...

Setup Home Object Manager

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

ADMINISTRATION

Users

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings

Data  
Email  
Platform Tools  
Apps

### Setup Users

#### New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name Last Name Alias Email Username Nickname Title Company Department Division

Role: <None Specified>  
User License: Salesforce Integration  
Profile: Salesforce API Only System Integrations  
Active: ☒  
Marketing User: ☐  
Offline User: ☐  
Knowledge User: ☐  
Flow User: ☐  
Service Cloud User: ☐  
Site.com Contributor User: ☐  
Site.com Publisher User: ☐  
WDC User: ☐  
Data.com User Type: <None-->  
Data.com Monthly Addition Link: Default Link (000)  
Accessibility Mode (Classic Only): ☐  
High Contrast Palette on Charts: ☐  
Load Lightning Pages While Scrolling: ☒  
Debug Mode: ☐

WhatsApp | Salesforce Developer | 1020 Top Hits 2023 | Object Manager | Users | Salesforce | Downloads

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2F%3FFeedURL%3D%252F005%253F%2FUserEntityOv...

Setup Home Object Manager

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

ADMINISTRATION

Users

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings

Data  
Email  
Platform Tools  
Apps

### Setup Users

#### New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name: sowniya  
Last Name: bala  
Alias: sbala  
Email: 2k20cse179@knot.ac.in  
Username: 2k21n@knot.ac.in  
Nickname: User169616771282564526  
Title: worker  
Company: knot bank  
Department:   
Division:

Role: <None Specified>  
User License: Salesforce Platform  
Profile: Manager  
Active: ☒  
Marketing User: ☐  
Offline User: ☐  
Knowledge User: ☐  
Flow User: ☐  
Service Cloud User: ☐  
Site.com Contributor User: ☐  
Site.com Publisher User: ☐  
WDC User: ☐  
Data.com User Type: <None-->  
Data.com Monthly Addition Link: Default Link (000)  
Accessibility Mode (Classic Only): ☐  
High Contrast Palette on Charts: ☐  
Load Lightning Pages While Scrolling: ☒  
Debug Mode: ☐

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/pageAddress=...%2F005500000A4uG%3FnoRedirect%3D1%26isUserEntryO...

Setup Home Object Manager

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

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

Users

User Detail

Name: Sowmya Bala  
Alias: sbala  
Email: 2b20cpe179@kot.ac.in (vach)  
Username: 2b21@kot.ac.in  
Nickname: User16951677120256412015  
Title: worker  
Company: Kot bank  
Department:  
Division:  
Address:  
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English  
Delegated Approver:  
Manager:  
Receive Approval Request Emails: Only if I am an approver  
Federated ID:  
App Registration: One-Time Password Authenticator  
App Registration: Salesforce Authenticator

Role: User License  
Profile: Manager  
Action: ☒  
Marketing User: ☐  
Offline User: ☐  
Knowledge User: ☐  
Flow User: ☐  
Service Cloud User: ☐  
Site.com Contributor User: ☐  
Site.com Publisher User: ☐  
WDC User: ☐  
Mobile Push Registrations: ☒  
Data.com User Type: ☐  
Accessibility Mode (Classic Only): ☐  
Debug Mode: ☐  
High Contrast Palette on Charts: ☐  
Load Lightning Pages While Scrolling: ☒  
Salesforce CRM Control User: ☒

mail.google.com/mail/u/0/#inbox/7Mfcg2GvS6lSsqKLaCGhDnsCkdul

Search in mail

Active

Compose

Mail

Inbox 5,378

Starred

Snapped

Sent

Drafts

More

Labels

support@salesforce.com <support@salesforce.com>  
to me

7:13 PM (0 minutes ago)

salesforce

Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Username:  
[2b21@kot.ac.in](mailto:2b21@kot.ac.in)

Again, welcome to Salesforce!

© Copyright 2000-2018 Salesforce.com, Inc. All rights reserved. Various trademarks held by their respective owners.



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

salesforce

### Change Your Password

Enter a new password for 2k21it@kiet.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:

Change Password

Password was last changed on 01/10/2023, 7:33 pm.

Login | Salesforce

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

Incognito

salesforce

Username:

Password:

Log In


☐ Remember me

[Forgot Your Password?](#)

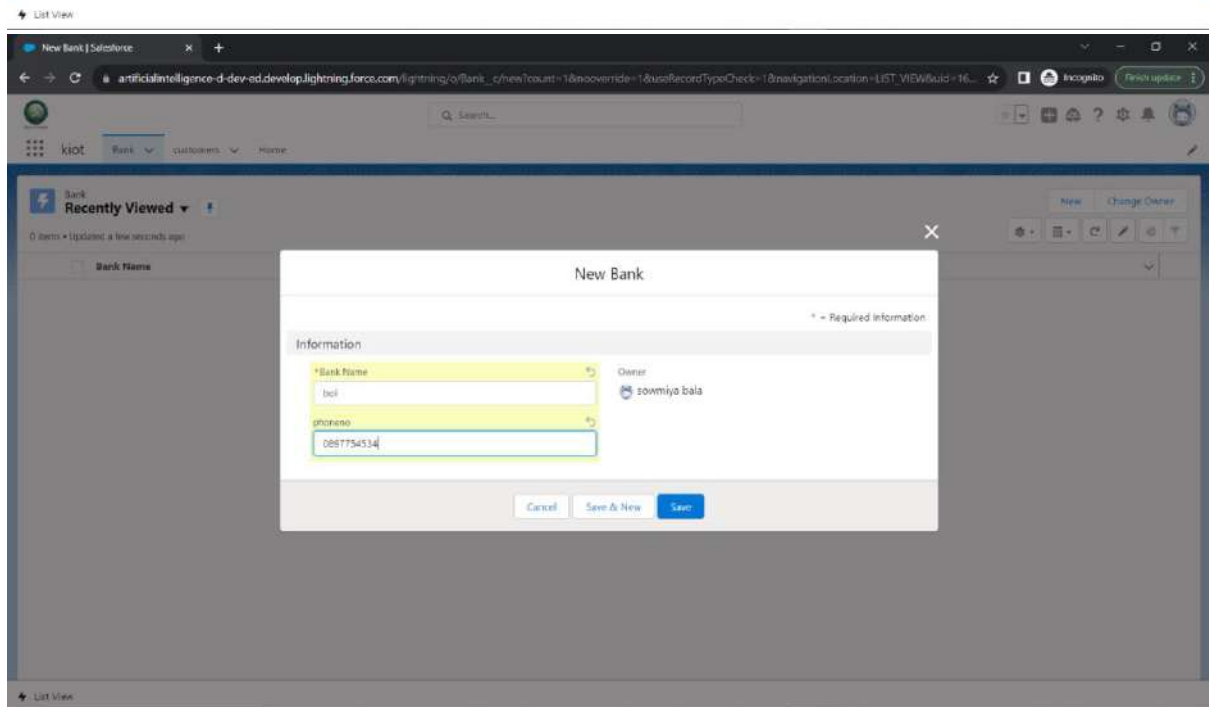
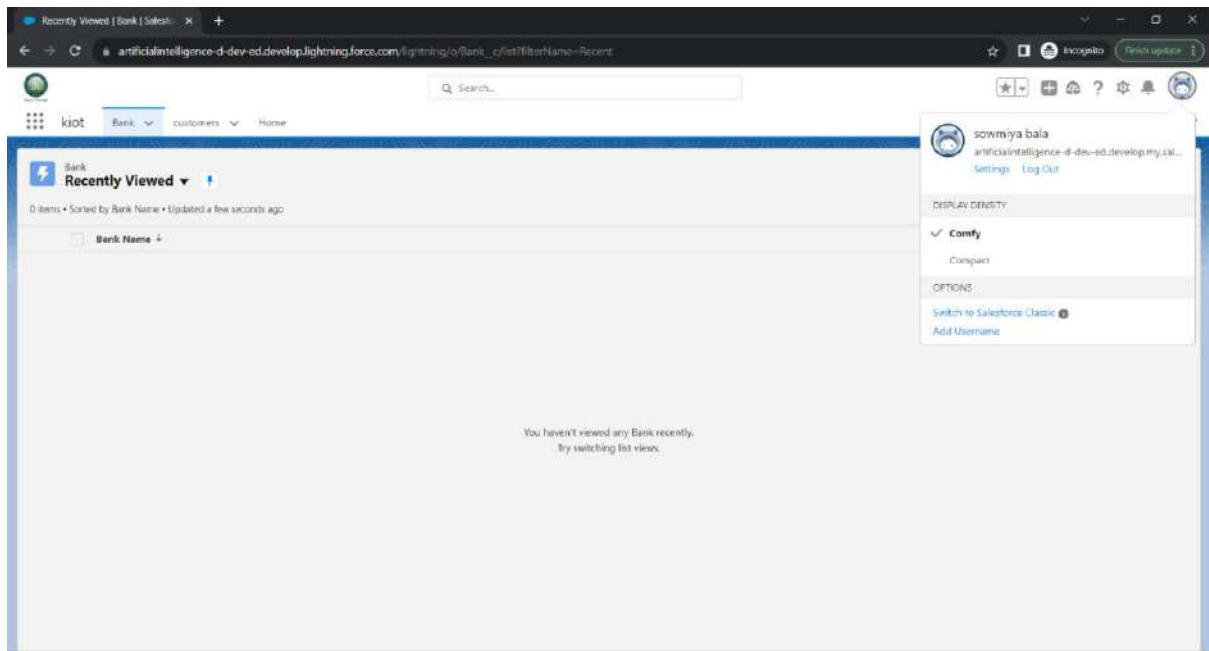
© 2023 Salesforce, Inc. All rights reserved.

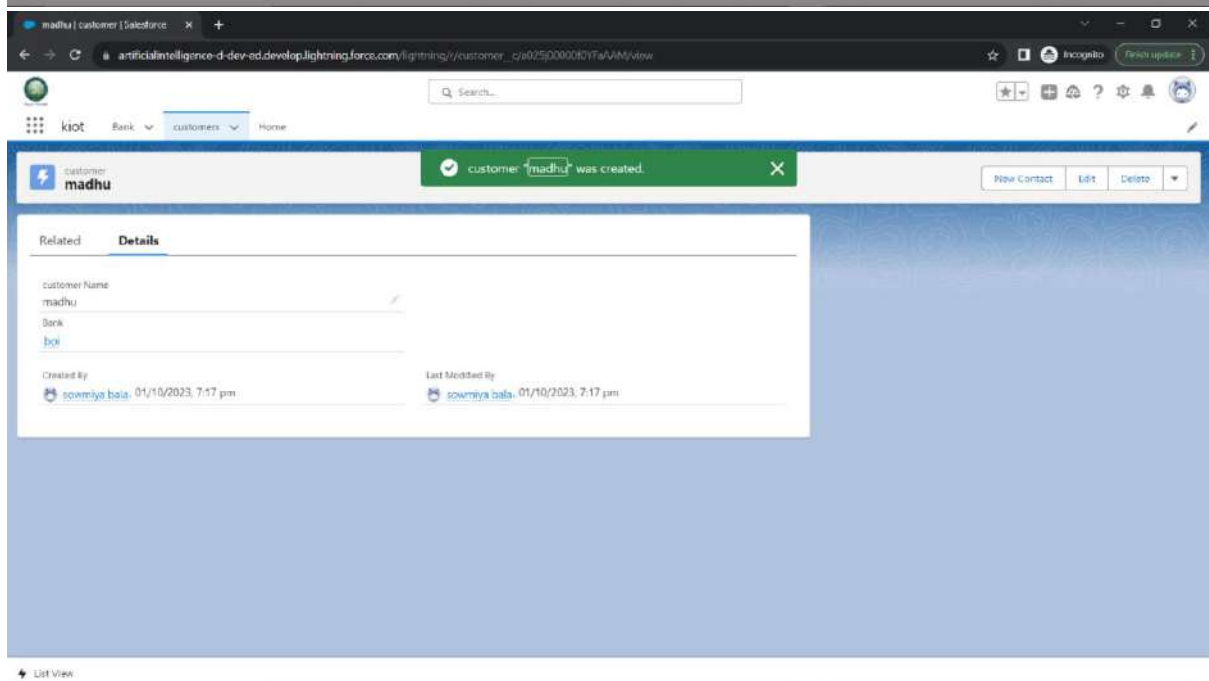
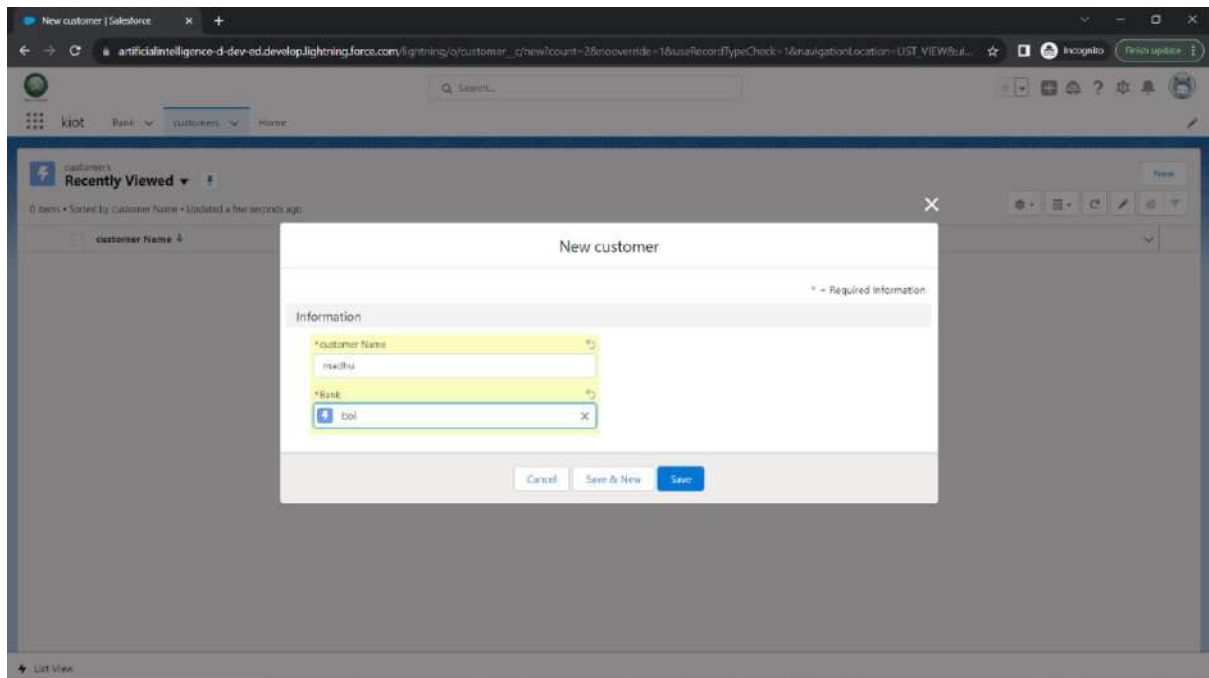
## Join us for the future of trusted enterprise AI, streaming on Salesforce+.

WATCH ON DEMAND



# AI Day







The screenshot displays the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Release Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. The main content area shows the Profiles page. The table lists the following profiles:

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%3Fsetupid%3DEnhancedPr...

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

### Profiles

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.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Settings Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

**Profile Detail**

Name: salesmanage

User License: Salesforce Platform

Description:

Created By: GGPAL.S. 01/10/2023, 7:15 pm

Modified By: GGPAL.S. 01/10/2023, 7:15 pm

**Page Layouts**

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%3Furl%3D%2F00e5j000000WQCE%3Fsetupid%3DEnhancedPr...

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

### Profiles

Profile Edit: salesmanage

Set the permissions and page layouts for this profile.

**Profile Edit**

Name: salesmanage

User License: Salesforce Platform

Description:

Custom Profile: ☒

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

☐ Override every personal tab customizations

**Standard Tab Settings**

Name	Default On	Learning	Default On
Accounts	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Assets	<input type="checkbox"/>		<input type="checkbox"/>

Salesforce Setup interface showing the **Profiles** configuration page. The left sidebar includes navigation options 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 **Profiles** configuration for a selected profile. It includes sections for **Custom Object Permissions**, **Session Settings**, and **Password Policies**.

**Custom Object Permissions:**

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

**Session Settings:**

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

**Password Policies:**

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

Salesforce Setup interface showing the **Profiles** configuration page. The left sidebar includes navigation options 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 **Profiles** configuration for a selected profile. It includes sections for **Custom Object Permissions**, **Session Settings**, and **Password Policies**.

**Custom Object Permissions:**

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

**Session Settings:**

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

**Password Policies:**

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

Buttons at the bottom: Save, Save & New, Cancel

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

## Setup Users

### New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name Last Name Alias Email Username Nickname Title Company Department Division

Role <None Specified> User License Salesforce Integration Profile Salesforce API Only System Integrations Active Marketing User Offline User Knowledge User Flow User Service Cloud User Site.com Contributor User Site.com Publisher User WDC User Data.com User Type Data.com Monthly Addition Link Accessibility Mode (Classic Only) High Contrast Palette on Charts Load Lightning Pages While Scrolling Debug Mode

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

## Setup Users

### New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name mediku Last Name b Alias mb Email 2k20cse179@knot.ac.in Username 2k20cse179@knot.ac.in Nickname User169616842428654192 Title worker Company knot bank Department Sales Division

Role <None Specified> User License Salesforce Platform Profile salesmanager Active Marketing User Offline User Knowledge User Flow User Service Cloud User Site.com Contributor User Site.com Publisher User WDC User Data.com User Type Data.com Monthly Addition Link Accessibility Mode (Classic Only) High Contrast Palette on Charts Load Lightning Pages While Scrolling Debug Mode

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page/address=%2F005%2F%3FrestURL%3D%252F005%253F%2FUserEnd...

Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Setup Users

Mailing Address

Street

City

ZipPostal Code

StateProvince

Country

Single Sign On Information

Federation ID

Locale Settings

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

Locale English (India)

Language English

Approver Settings

Designated Approver

Manager

Receive Approval Request Emails Only if I am an approver

Generate new password and notify user immediately

Save Save & New Cancel

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page/address=%2F005%2F%3FrestURL%3D%252F005%253F%2FUserEnd...

Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Setup Users

Mailing Address

Street 4/194 - adampalayam, utthamasoapam...

City SALEM

ZipPostal Code 632008

StateProvince TAMIL NADU

Country

Single Sign On Information

Federation ID

Locale Settings

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

Locale English (India)

Language English

Approver Settings

Designated Approver

Manager

Receive Approval Request Emails Only if I am an approver

Generate new password and notify user immediately

Save Save & New Cancel



WhatsApp Salesforce Developer Session 2 17:28 Top Hits 2023 New Po Users | Salesforce Welcome to Salesforce: Verify y...

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page/address+%2F005500000A4UvV%3Fforcedirect%3D1%26IdUserEn...

Setup Home Object Manager

Search Setup

User

Users

User Detail

Name: madhu b

Alias: mb

Email: 2k20csit179@kiet.ac.in (Verify)

Username: 2k20csit@kiet.ac.in

Nickname: User16951504242065419205

Title: worker

Company: kiet bank

Department: S&CS

Division:

Address: 4/154, arivandhampalayam, udamasolepattam, Parakkadu, Salem- 636308, SALEM 636305, TAMIL NADU

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

Locale: English (India)

Language: English

Evergreen Approver:

Manager:

Resolve Approval Request Emails: Only if I am an approver

Federation ID:

App Registration One Time Password Authenticator:

Role: User License

Profile: Salesforce Platform

Action: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WCX User: ☐

Mobile Push Notifications: ☒

Data.com User Type: ☐

Accessibility Mode (Classic Only): ☐

Debug Mode: ☐

High Contrast Palette on Charts: ☐

Load Lightning Pages While Scrolling: ☒

WhatsApp Gmail

mail.google.com/mail/u/0/#inbox/7fMfcg20b0d0SsqKkLzCGhbDnsCkdud

Search in mail

Active

Compose

Mail

Inbox 5,378

Starred

Snoozed

Sent

Drafts

More

Labels

1 of 6,466

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:

<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>

Username:

[2k20csit@kiet.ac.in](mailto:2k20csit@kiet.ac.in)

Again, welcome to Salesforce!

© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.

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

Reply Forward

Change Your Password | Salesforce

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

Incognito (O) Finish update

**salesforce**

### Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password:  Good

\* Confirm New Password:  Match

Security Question:  
In what city were you born?

\* Answer:

**Change Password**

Password was last changed on 03/10/2023, 7:24 pm.

Recently Viewed | Bank | Salesforce

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

Incognito (O) Finish update

kiot Bank customers Home

Search...

**Bank**

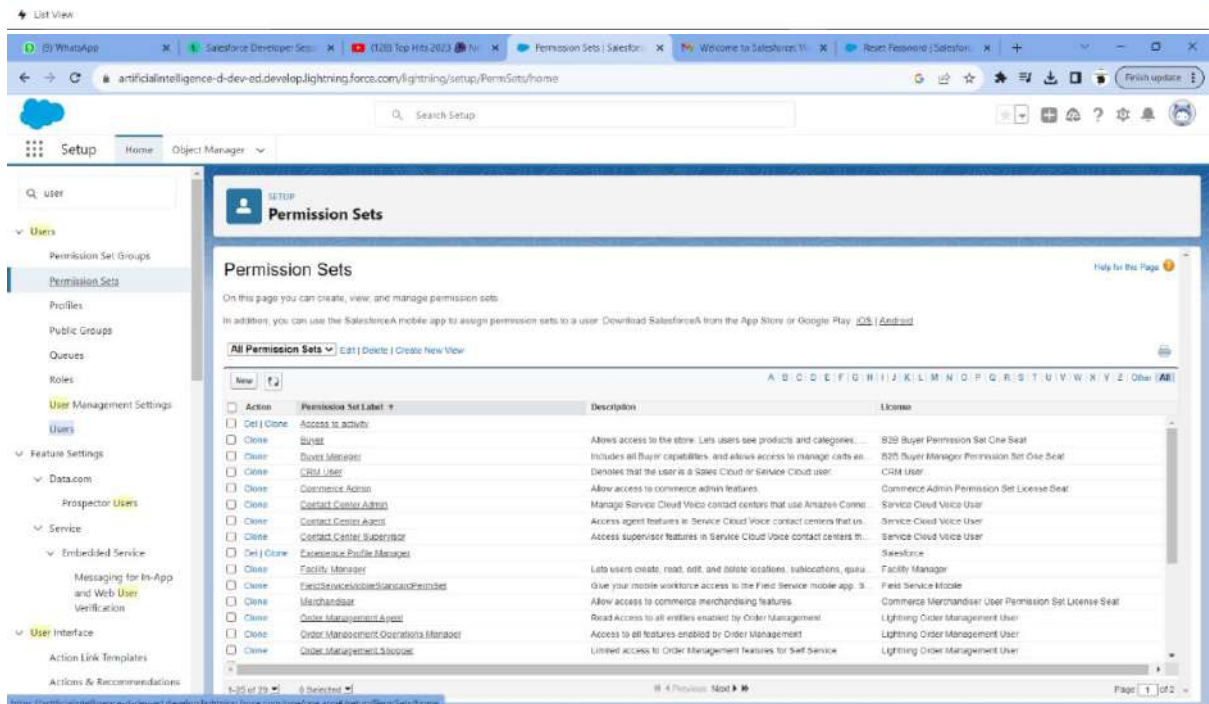
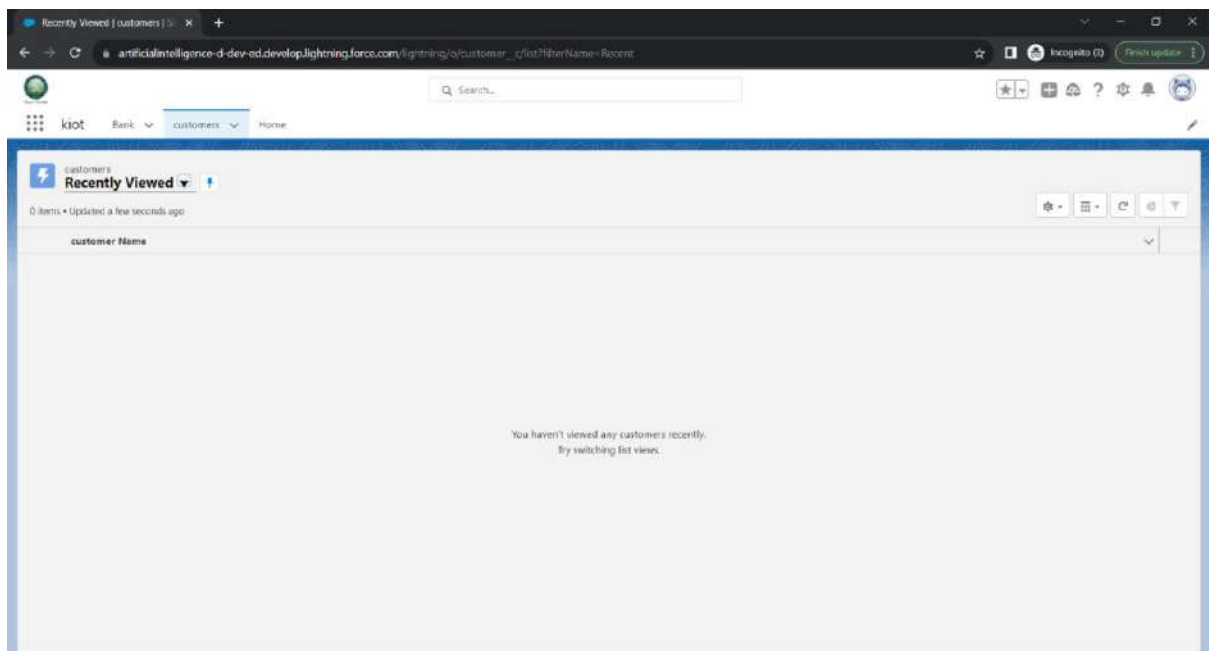
### Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

List View





## Step 2:

### Permission Sets:

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

### Object-Level Security:

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

### Record-Level Security:

- Implement record-level security using Criteria-Based Sharing Rules.
- Create a sharing rule that shares Account records owned by User A with User A and records owned by IJser 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:

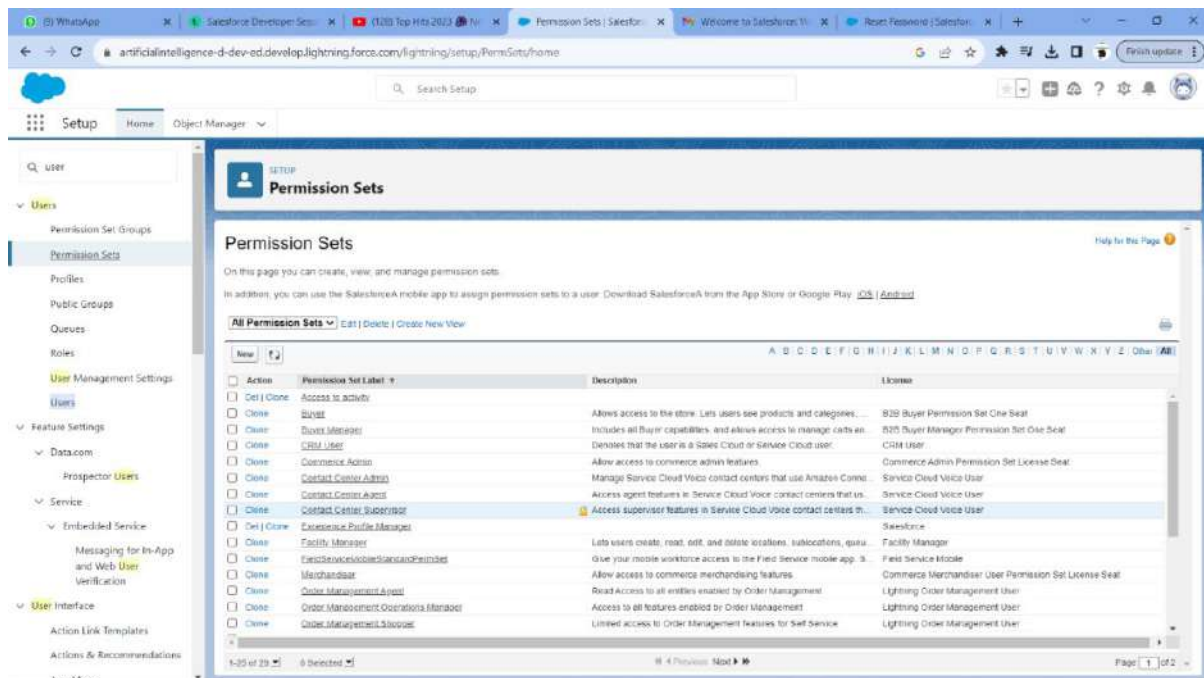
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## 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.



artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/pageAddress=9%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

### 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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/pageAddress=9%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

### 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

Screenshot of the Salesforce Setup page for the 'salesmanager' Permission Set. The left sidebar shows the navigation menu with 'Users' selected. The main content area displays the 'Permission Set Overview' for 'salesmanager', including fields for Description, License, Session Activation Required, Last Modified By, API Name, Message Profile, and Created By. Below the overview, there are sections for 'Apps' and 'Object Settings'.

**Permission Set Overview**

Field	Value
Description	
License	
Session Activation Required	<input type="checkbox"/>
Last Modified By	GCPLAS, 01/10/2023, 7:20 pm
API Name	salesmanager
Message Profile	
Created By	GCPLAS, 01/10/2023, 7:20 pm

**Apps**

**Assigned Apps**  
Settings that specify which apps are visible in the app menu.

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu.

**Object Settings**  
Permissions to access objects and fields, and settings such as tab availability.

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers".

**Apex Class Access**  
Permissions to execute Apex classes.

**Visualforce Page Access**  
Permissions to execute Visualforce pages.

**External Data Source Access**  
Permissions to authenticate against external data sources.

**Flow Access**  
Permissions to execute Flows.

Screenshot of the Salesforce Setup page for the 'salesmanager' Permission Set, showing the 'Object Settings' tab. The left sidebar shows the navigation menu with 'Users' selected. The main content area displays the 'Object Settings' table, which lists various objects and their permissions.

**Object Settings**

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insights Reasons	No Access	--	--
AI Reason Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Responses	No Access	--	--
Application Usage Assessments	No Access	--	--
Appointment Criterias	No Access	5	--
Appointment Invitations	No Access	17	--
Appointment Systems	--	4	--
Appointment Schedule Appointments	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Type Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	10	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset Role Profiles	No Access	11	--

WhatsApp | Salesforce Developer | 1020 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce | Finish update

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/pageAddress=%2F0P55j000009Phok%2F%3DEntityPermissions%26o%3D...

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

Permission Sets

Permission Set: salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Bank

Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

WhatsApp | Salesforce Developer | 1020 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce | Finish update

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/pageAddress=%2F0P55j000009Phok%2F%3DEntityPermissions%26o%3D...

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

Permission Sets

Permission Set: salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Bank

Bank

Save Cancel

Tab Settings

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

Object Permissions

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

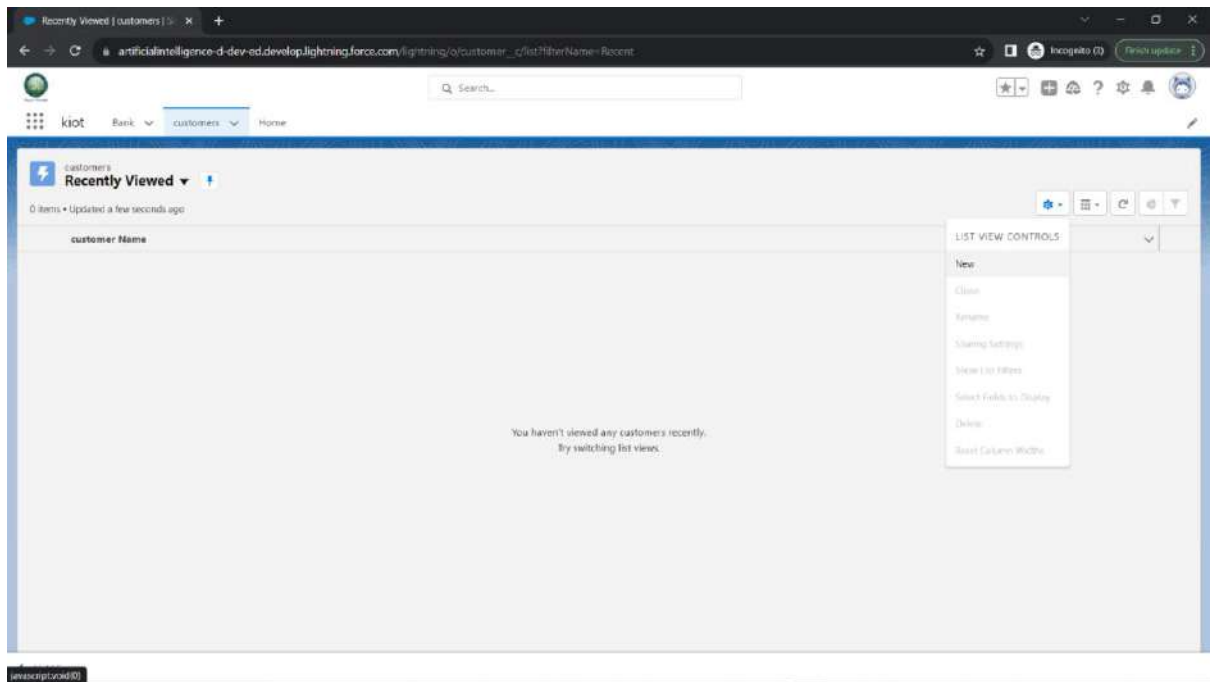
Field Permissions

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









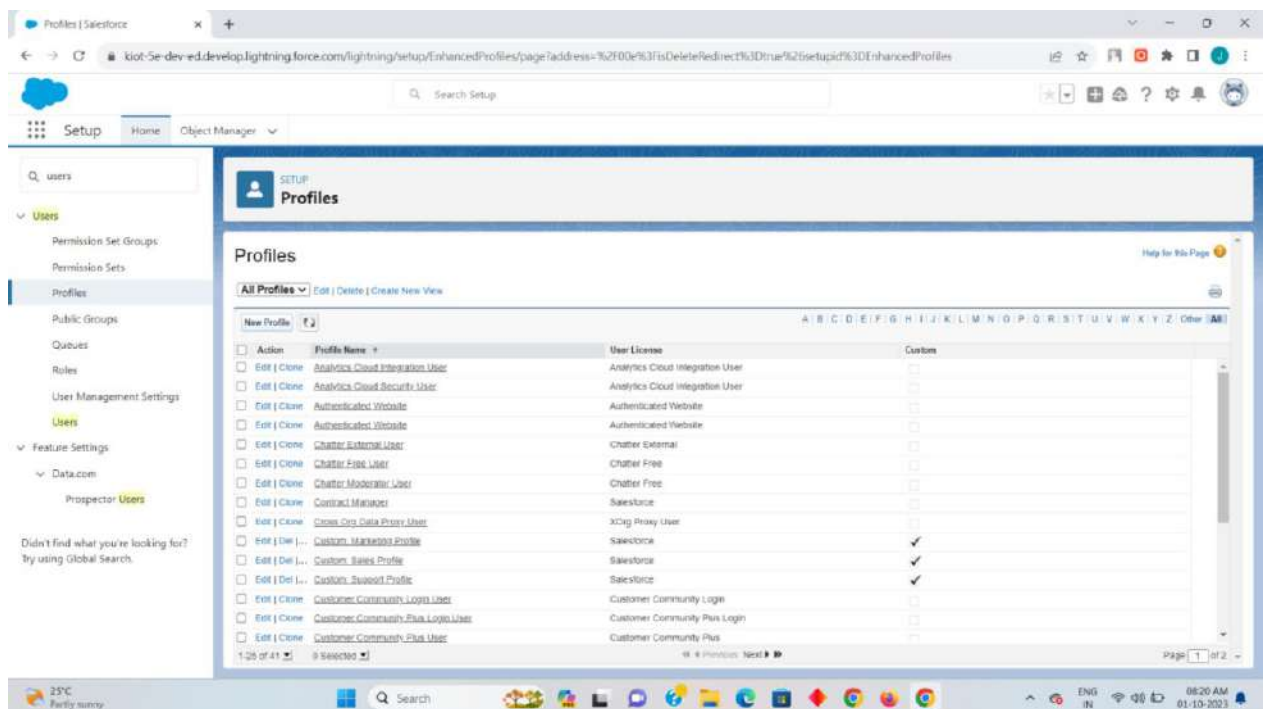


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

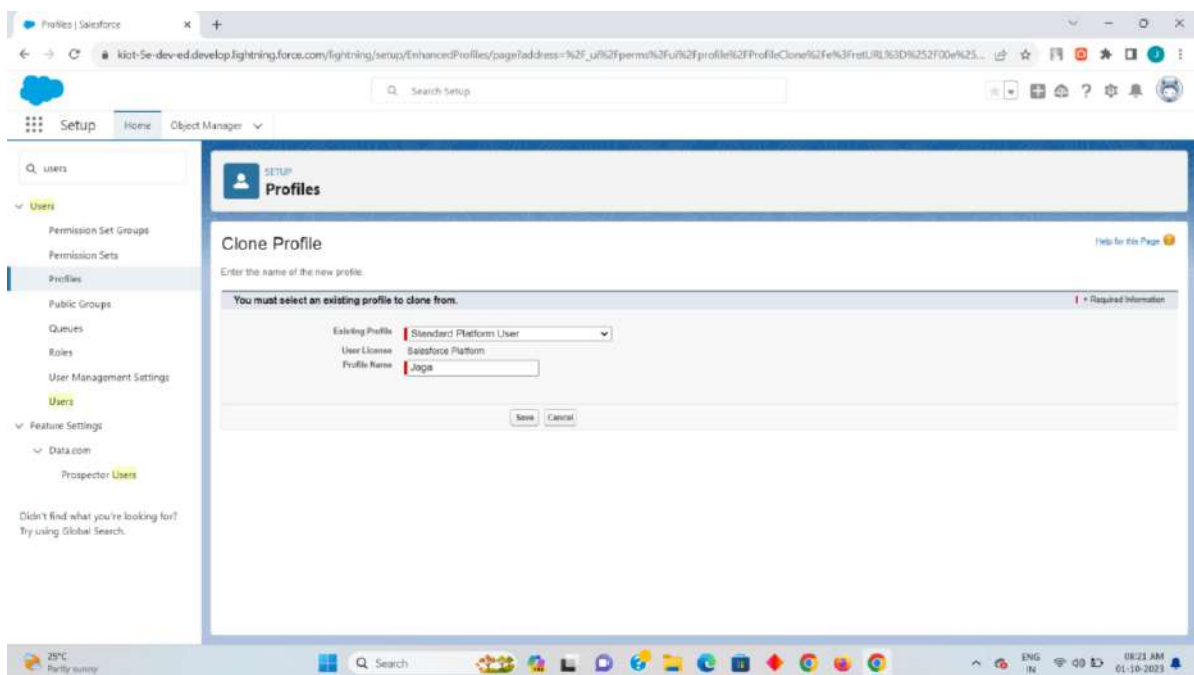
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



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.

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

Search Setup

Setup Home Object Manager

users

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.

### Profiles

Standard Object Permissions

	Read	Create	Edit	Delete	View All	Modify All
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

	Read	Create	Edit	Delete	View All	Modify All
Providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resources	<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

Enable different Experience Cloud login policies for employees: ☐

Separate Experience Cloud site and Salesforce login authentication for employees: ☐

Require login IP restrictions: ☐

Skip employee device activation during Experience Cloud site login: ☐

Profiles | Salesforce

Search Setup

Setup Home Object Manager

users

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.

### Profiles

Standard Object Permissions

	Read	Create	Edit	Delete	View All	Modify All
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

	Read	Create	Edit	Delete	View All	Modify All
Providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resources	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

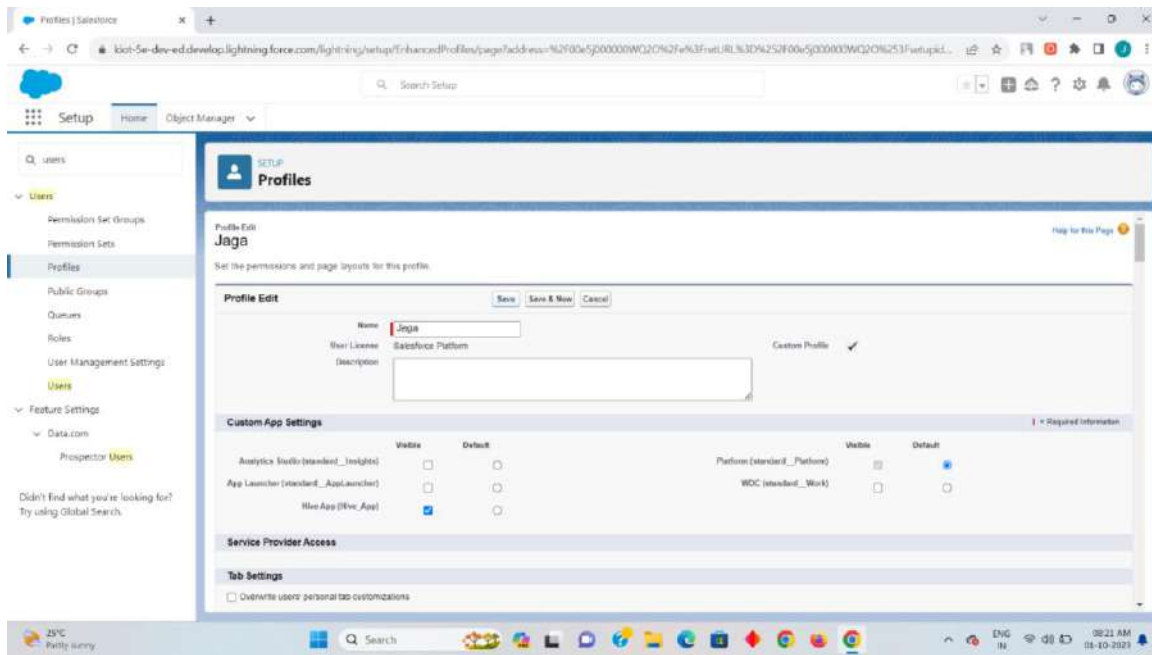
Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees: ☐

Separate Experience Cloud site and Salesforce login authentication for employees: ☐

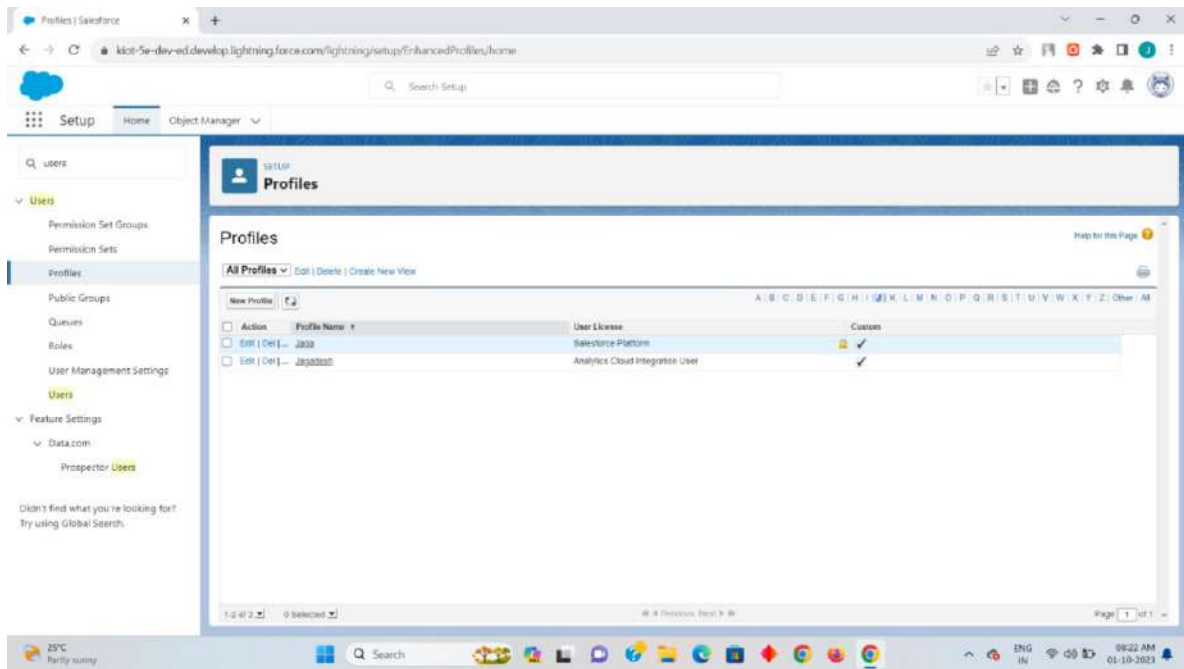
Require login IP restrictions: ☐

Skip employee device activation during Experience Cloud site login: ☐



## 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:

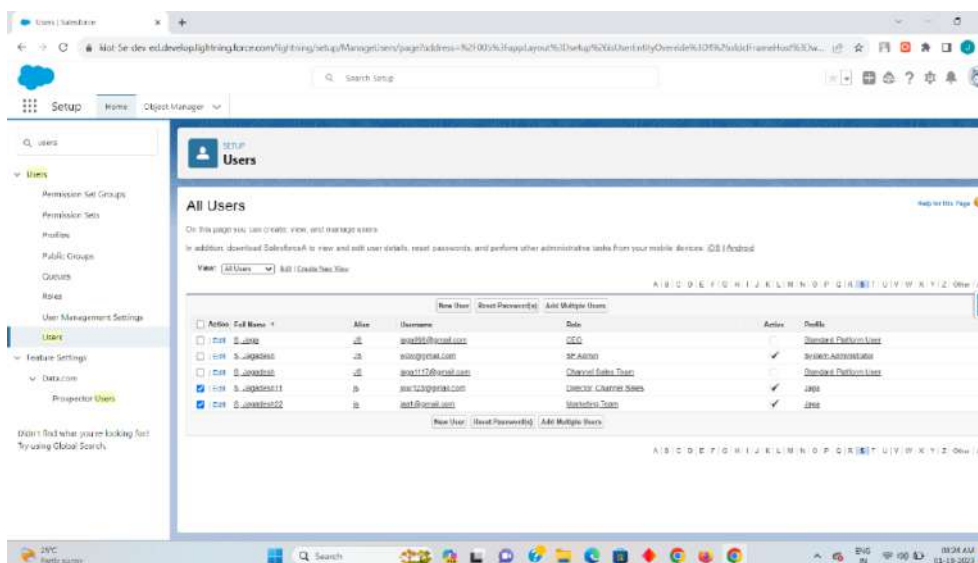
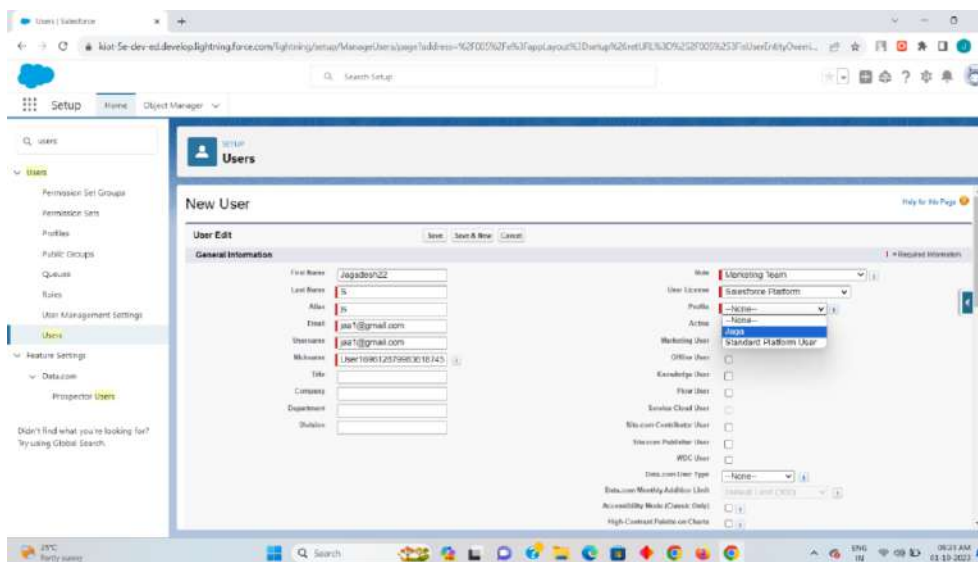
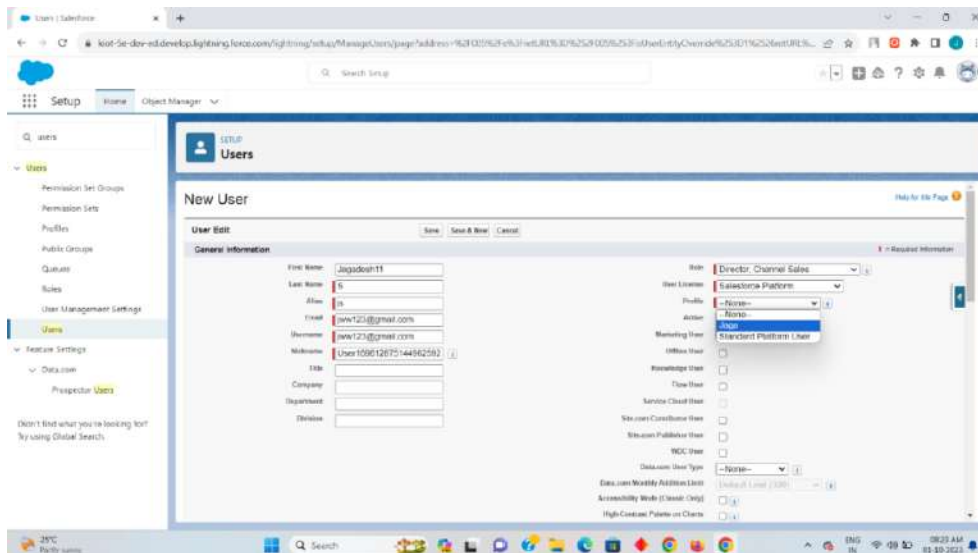
Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along

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 users are created click on save.

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains navigation links for various setup areas, with 'Users' currently selected. The main panel, titled 'All Users', provides a list of existing users. Each user entry includes an 'Action' column with links to edit or delete, a 'Full Name' column, an 'Alias' column, a 'Username' column, a 'Role' column, an 'Active' checkbox, and a 'Profile' column. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatter_50d50000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	Gary Jaga	ggary	ggary_gary79gcmrsmam.c27d8qpm3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<a href="#">Edit</a>	S. Jaga	sJ	sga255@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	S. Jaga	sJ	sJaga@gmail.com	SC Admin	<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	S. Jaga	sJ	sga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	User Integration	intgr	integration@60d50000000000000000000000000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	usgntasecurity@60d50000000000000000000000000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

The bottom of the image shows a Windows taskbar with the date and time as 08:21 AM on 01-10-2023.





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

### Step 6:

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

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



Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0F55000008FgU63F&dcFrameOrigin%3Dhttp%3A%2F%2Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

users

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.

## SETUP

### Permission Sets

permission12

Find Settings Close Delete Edit Properties Manage Assignments

**Permission Set Overview**

Description:   
License:   
Session Authentication Required:   
Last Modified By: jgagabab 01/10/2023, 8:24 am

API Name: permission12  
Namespace Prefix:   
Created By: jgagabab 01/10/2023, 8:24 am

**Apps**

**Assigned Apps**  
Settings that specify which apps are visible in the app menu

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu

**Object Settings**  
Permissions to access objects and fields, and to perform such as table available

**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**

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0F55000008FgU63F&dcFrameOrigin%3Dhttp%3A%2F%2Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

users

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.

## SETUP

### Permission Sets

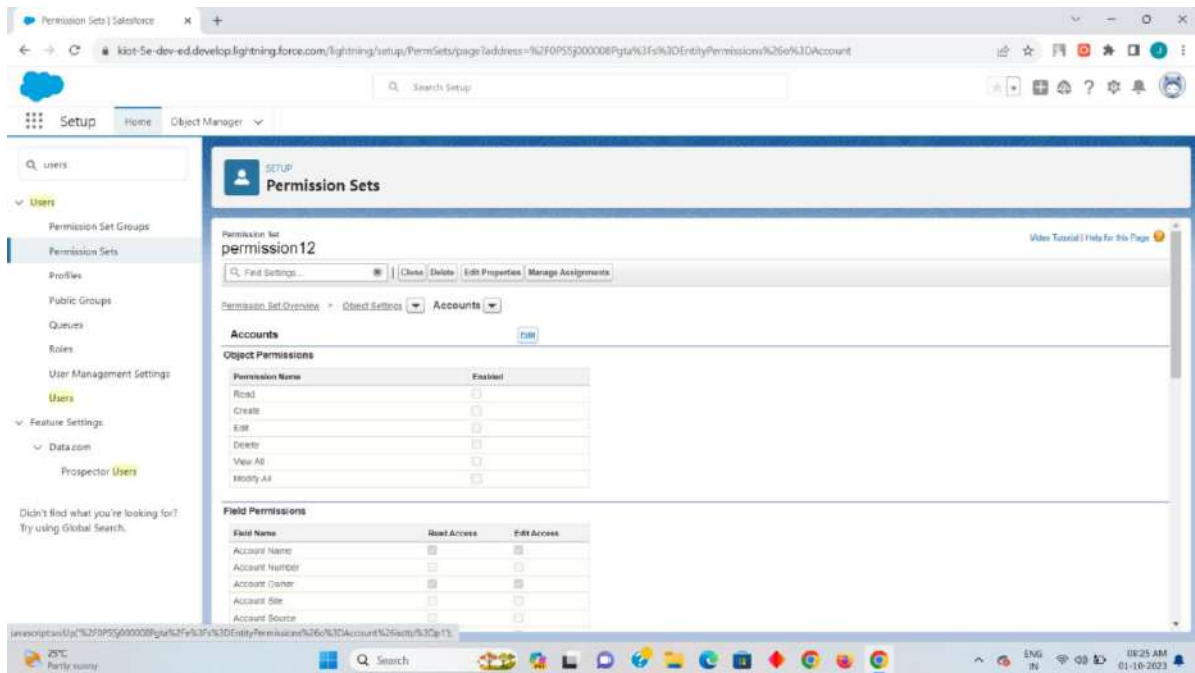
permission12

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings

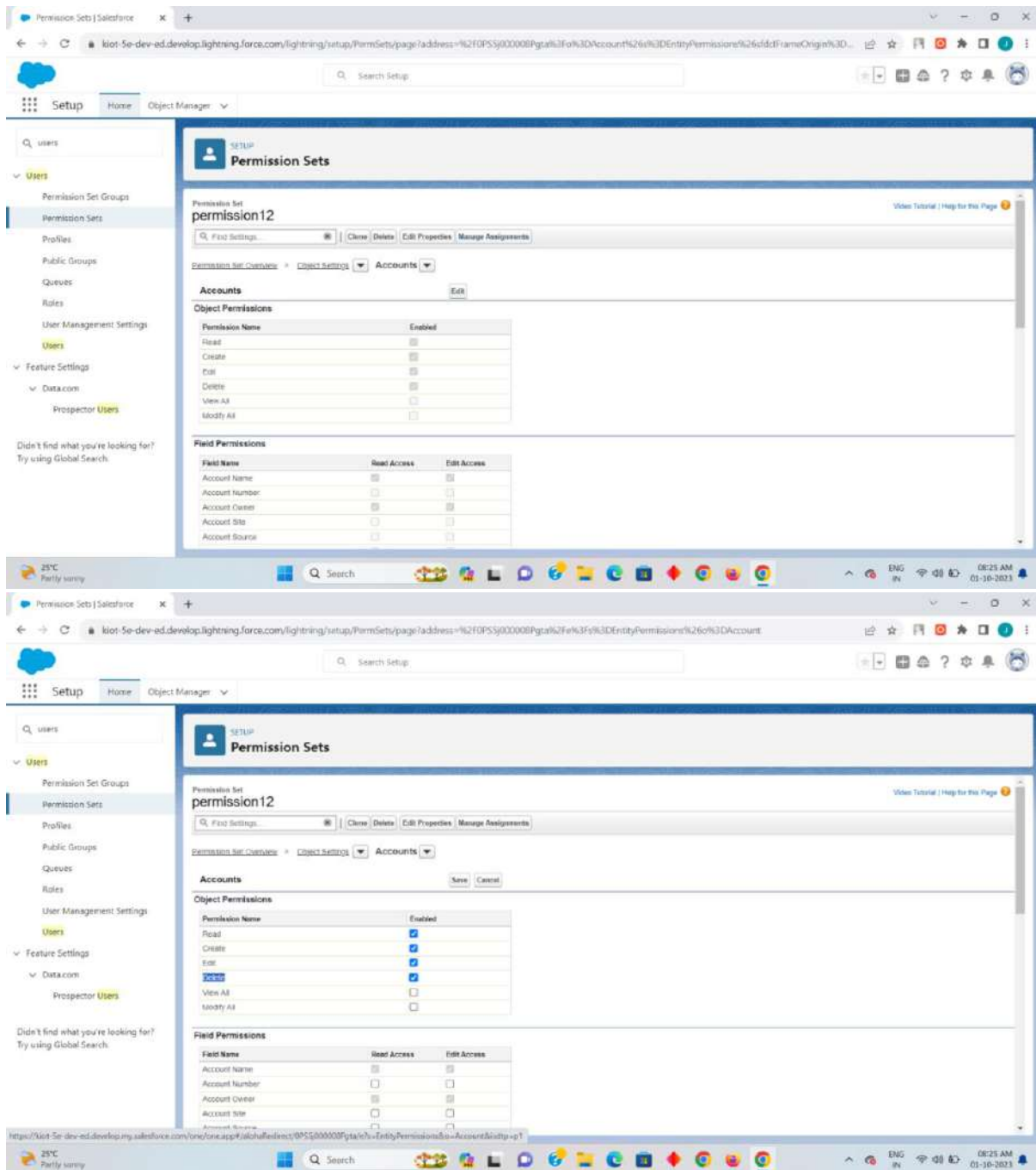
**Object Settings**

Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	9	--
Account	No Access	44	--
AI Insight Reasons	No Access	--	--
AI Recent Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anonymous Event Stores	No Access	14	--
App Analytics Query Results	No Access	--	--
Application License Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invites	--	4	--
Appointment Schedule Appointments	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	16	--



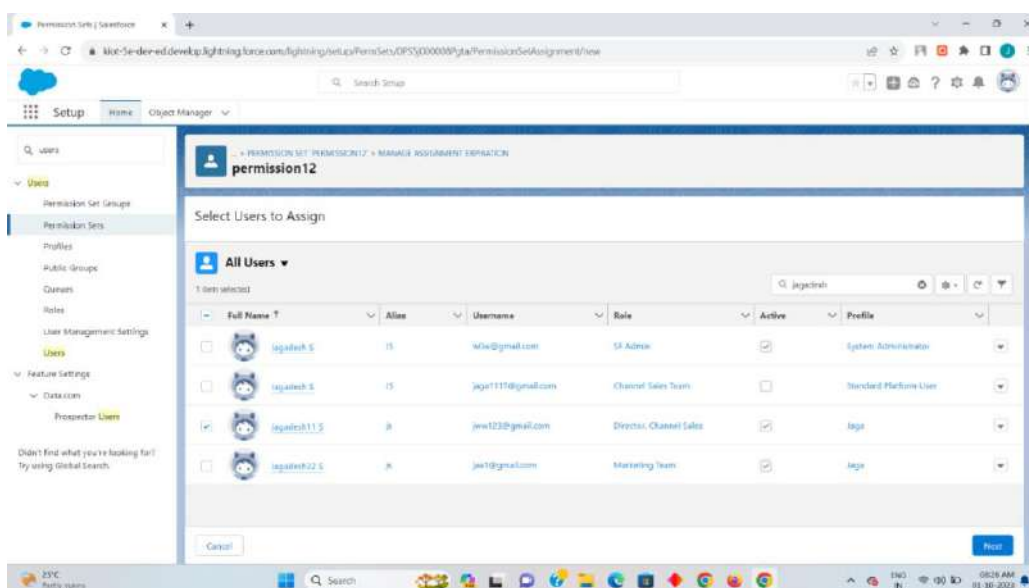
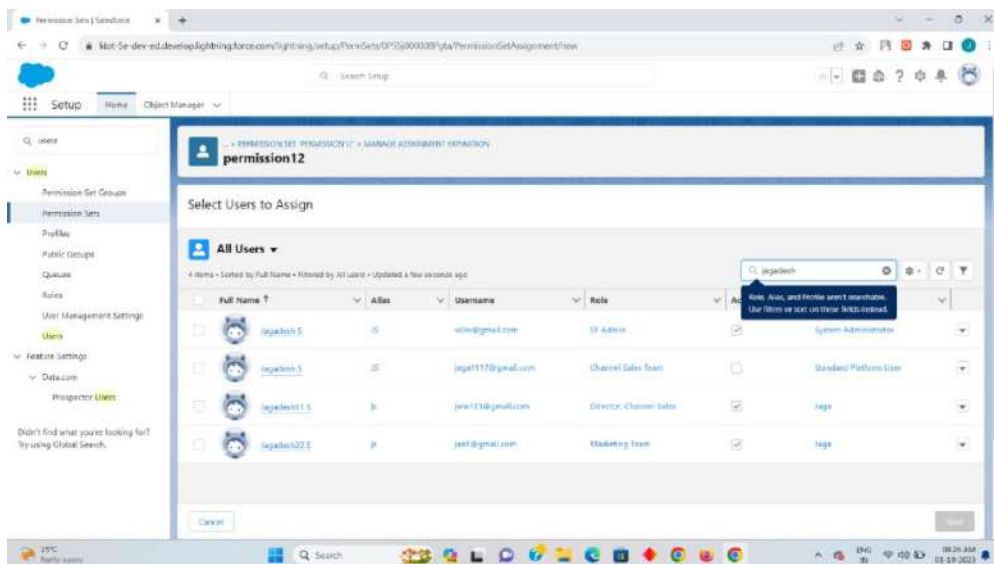
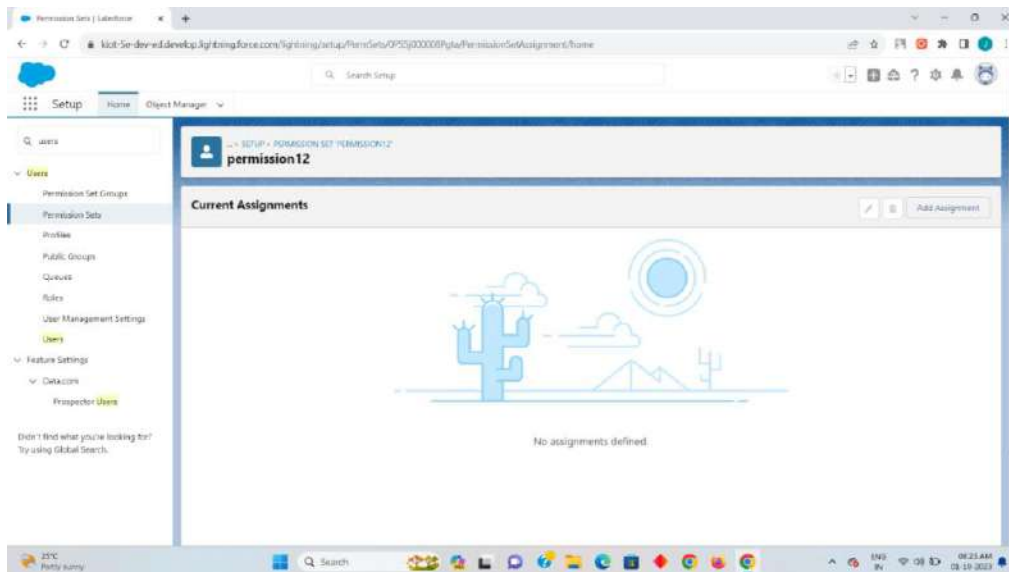
## Step 7:

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

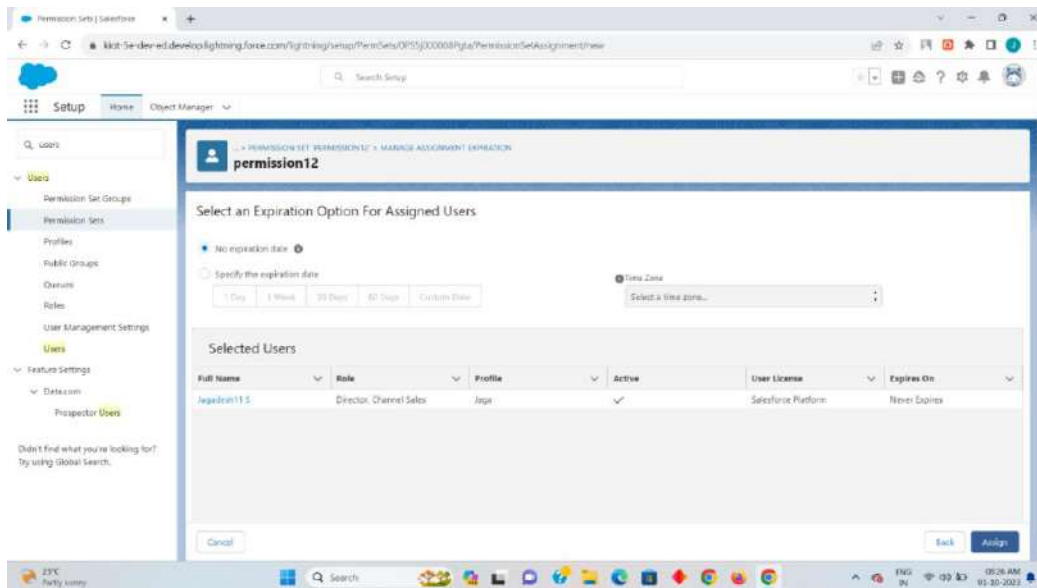


## Step 8

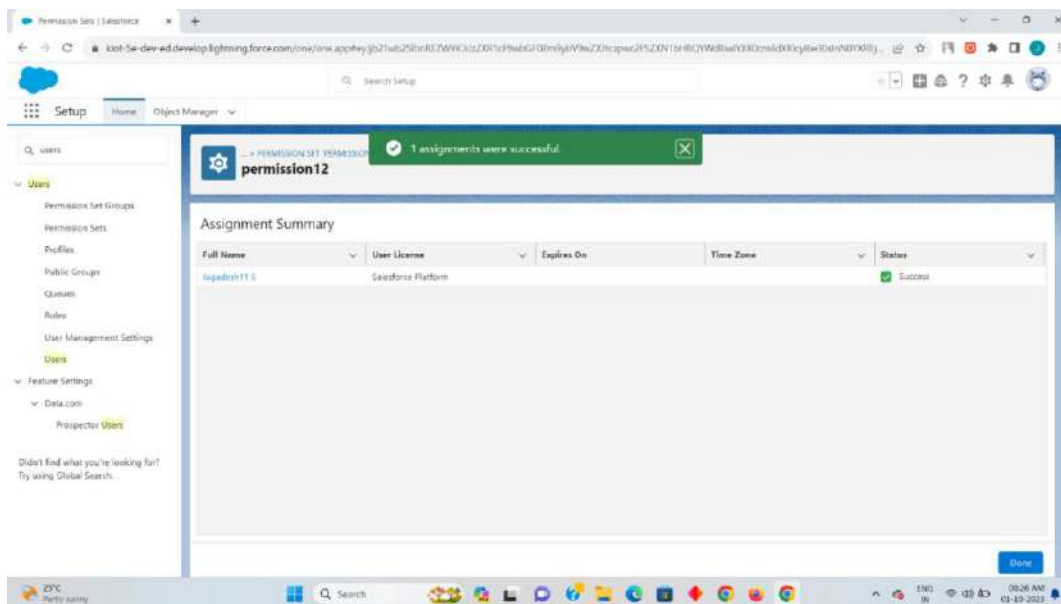
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



Now the specific access for the Jagadeesh11 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**.



<div>  <div> <div>SETUP &gt; OBJECT MANAGER</div> <div>Survey Result</div> </div> </div>					
<div>Details</div> <div>Fields &amp; Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>Search Layouts for Salesforce Classic</div> <div>Triggers</div> <div>Validation Rules</div>	<div>Fields &amp; Relationships</div> <div>8 Items, Sorted by Name</div> <div>Quick Find</div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div>				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	Comment	Comment__c	Text Area(255)		
	Created By	CreatedById	Lookup(User)		
	Email	Email__c	Email		
	Last Modified By	LastModifiedById	Lookup(User)		
	Name	Name__c	Text(51)		
	Owner	OwnerId	Lookup(User,Group)		✓
	Rating	Rating__c	Picklist		
	Survey Result Name	Name	Auto Number		✓

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

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

Email Template

Thank You Email - Survey

[Edit in Builder](#)
[Edit](#)
[Clone](#)

Details
Related

Information

Email Template Name	Thank You Email - Survey	Related Entity Type	Survey Result
Description		Folder	Public Email Templates
Made in Email Template Builder	<input checked="" type="checkbox"/>		

Message Content

Subject	Thank You For Completing Our Survey!	Enhanced Letterhead	
HTML Value	<div> <div></div> <div> 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 </div> <div></div> </div>		

Additional Information

Created By	Rakesh Gupta, 12/21/2020, 4:23 PM	Last Modified By	Rakesh Gupta, 12/21/2020, 4:32 PM
------------	-----------------------------------	------------------	-----------------------------------

## Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.
3. Select **Email Alerts**, click on the **New Email Alert** button.
4. **Name** the **Email Alert** and click the Tab button. The **Unique Name** will populate.

5. For **Object** select **Survey Result**.
6. For the **Email Template** chooses **Lightning Email Template Thank You Email – Survey**.
7. For **Recipient Type** select **Email Field: Email**.
8. Click **Save**.

The screenshot shows the 'Edit Email Alert' interface for 'Survey - Thank You Email'. The page includes a header with 'Edit Email Alert' and 'Survey - Thank You Email', and a 'Help for this Page' link. Below the header is a description: 'Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.' The main form is titled 'Email Alert Edit' and contains several sections: 'Edit Email Alert' with fields for Description, Unique Name, Object, Email Template, Protected Component, and Recipient Type; 'Recipients' section with 'Available Recipients' and 'Selected Recipients' lists; 'Additional Emails' section with a text area; and 'From Email Address' section with a dropdown and a checkbox. The 'Recipients' section shows 'User: Integration User', 'User: Rakesh Gupta', and 'User: Security User' in the 'Available Recipients' list, and 'Email Field: Email' in the 'Selected Recipients' list. The 'From Email Address' section shows 'Current User's email address' as the selected option.

**Edit Email Alert** Save Save & New Cancel

**Edit Email Alert** ! = Required Information

Description ! Survey - Thank You Email

Unique Name ! Survey\_Thank\_You\_Email i

Object ! Survey Result

Email Template ! Thank You Email - Survey i

Protected Component ☐

Recipient Type ! Search:  ! for:  Find

**Recipients**

**Available Recipients**

User: Integration User  
User: Rakesh Gupta  
User: Security User

**Selected Recipients**

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. i

Save Save & New Cancel

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

1. Click **Setup**.

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

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

1. Drag-and-drop the **Create Records** element onto the Flow designer.
2. Enter a name in the **Label (Save Response)** field; the **API Name** will auto-populate.
3. For **How Many Records to Create** – select **One**.
4. For **How to Set the Record Fields** – select **Use separate resources, and literal values**.
5. Select the **Survey\_Result\_\_c** object from the dropdown list.
6. **Set Field Values for the Survey Result**
  1. Row 1:
    1. **Field: Comment\_\_c**

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

**2.Click Add Row**

**3.Row 2:**

**1.Field: Email\_\_c**

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

**4.Click Add Row**

**5.Row 3:**

**1.Field: Name\_\_c**

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

**6.Click Add Row**

**7.Row 3:**

**1.Field: Rating\_\_c**

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

**7.Click Done.**

Edit
Create Records

Create Salesforce records using values from the flow.

\* Label
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	←	A Comment	×	
Email__c	←	A Email > Value	×	
Name__c	←	{!Name.firstName} {!Name.lastName}		
Rating__c	←	A Rating	×	

+ 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.

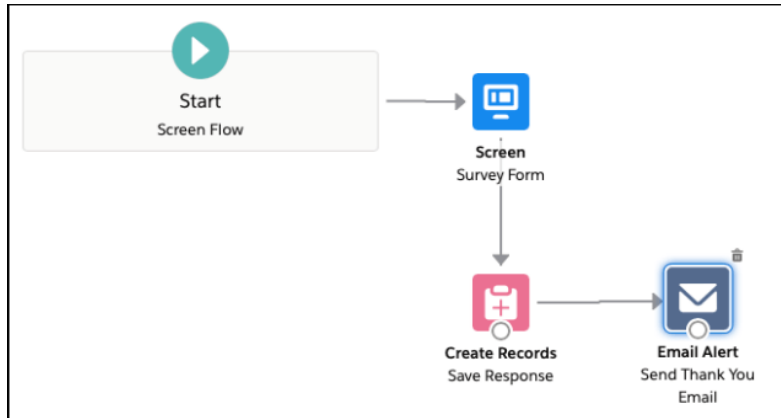
1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.

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

5. Click **Done**.

The screenshot shows a configuration window titled "Edit 'Survey - Thank You Email' email alert". It includes a header with instructions: "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." Below this, there are two input fields: "Label" with the value "Send Thank You Email" and "API Name" with the value "Send\_Thank\_You\_Email". A "Description" field is also present. Under the "Set Input Values" section, there is a field for "Record ID" with the value "{!Save\_Response}". At the bottom right, there are "Cancel" and "Done" buttons.

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



1. Click **Save**.

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

3. Click **Show Advanced**.

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

**5. Type: Screen Flow**

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

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

**8. Click Save.**

Save as

A New Version

A New Flow

\* Flow Label

Survey

\* Flow API Name

Survey

Description

Hide Advanced

How to Run the Flow ⓘ

User or System Context—Depends on How Flow is Launched

\* Type

Screen Flow

\* API Version for Running the Flow

51

Interview Label ⓘ

Insert a resource...

Survey {!\$Flow.CurrentDateTime}

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

2

Cancel

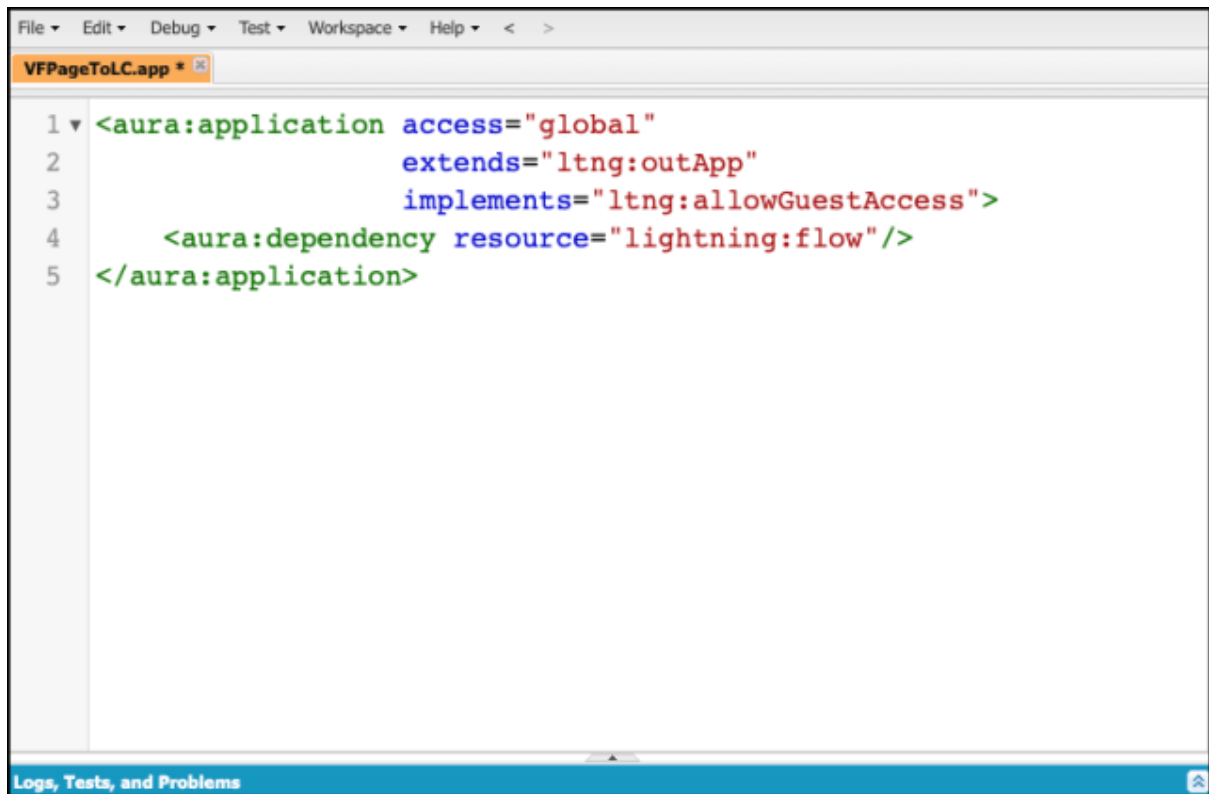
Save



## 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.



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

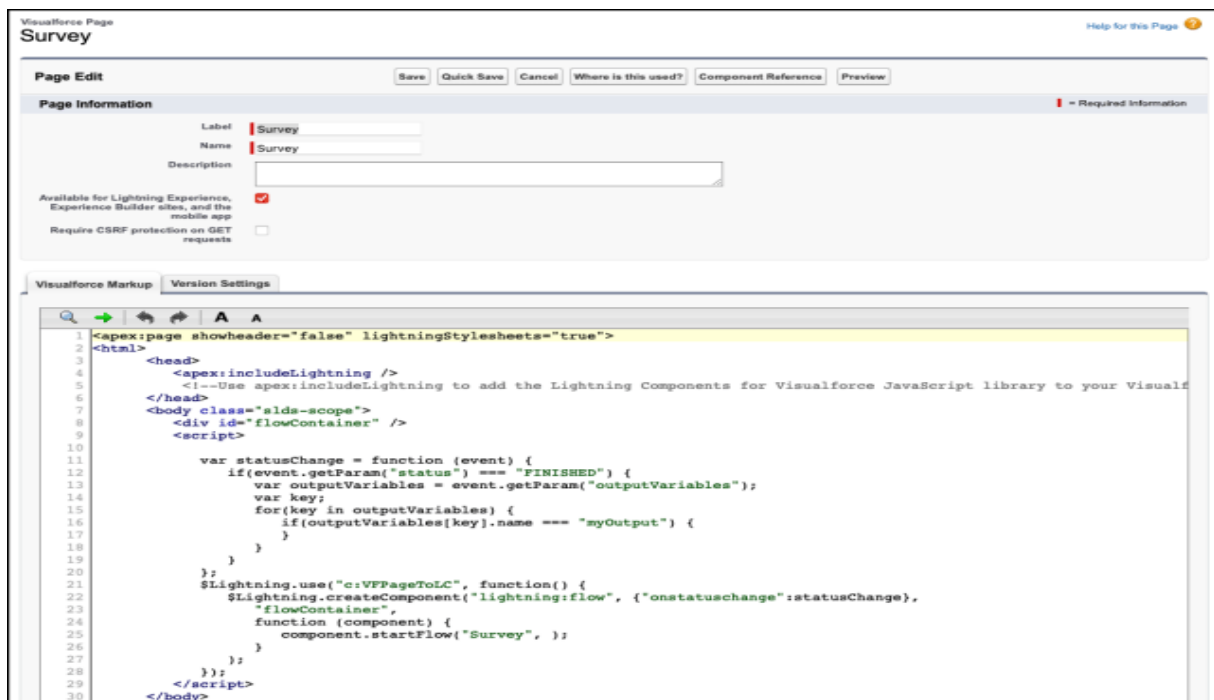
## Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

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

component on the page  
using **\$Lightning.createComponent()**

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



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

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

1. Click **Setup**.

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

**Site Edit** [Save] [Cancel]

Site Label: Survey [i]

Site Name: Survey [i]

Site Description: [Text Area]

Site Contact: Rakesh Gupta [i]

Default Record Owner: Rakesh Gupta [i]

Default Web Address: http://katihar-developer-edition.gus.force.com/ survey [i]

Active: ☒ [i]

Active Site Home Page: Survey [Preview] [i]

Inactive Site Home Page: InMaintenance [Preview] [i]

Site Template: SiteTemplate [i]

Site Robots.txt: [Text Field] [i]

Site Favorite Icon: [Text Field] [i]

Analytics Tracking Code: [Text Field] [i]

URL Rewriter Class: [Text Field] [i]

Enable Feeds: ☐

Clickjack Protection Level: Allow framing by the same origin only (Recommended) [i]

Require Secure Connections (HTTPS): ☒ [i]

Lightning Features for Guest Users: ☒ [i]

Upgrade all requests to HTTPS: ☒ [i]

Enable Content Sniffing Protection: ☒ [i]

Enable Browser Cross Site Scripting Protection: ☒ [i]

Referrer URL Protection: ☒ [i]

Guest Access to the Payments API: ☐ [i]

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

## Proof of Concept

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

### Survey

Name

First Name

Alok

Last Name

Sinfal

\* Email

\* Rating

5


\* Comment


Awesome Blog

Next

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

### Thank You For Completing Our Survey!

 Inbox



**Survey Site Guest User** via [bj9amq6fe7r1b-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

Reply Forward