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Assignment no 1

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

Solution:

Step 1: Create Custom Objects

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

Setup Home 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. [Take me there!](#) [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

Context Name:

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, 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

Data Type:

**Optional Features**

☐ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing [j](#)

**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 It? [?](#)

☐ 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"

The screenshot shows the Salesforce Setup interface, specifically the Object Manager section. The page title is "New Custom Object". A yellow banner at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tailor the menu!](#) [Don't show this message again](#)".

The main section is "Custom Object Definition Edit" with buttons for "Save", "Save & New", and "Cancel". It is divided into several sections:

- Custom Object Information:** This section includes fields for "Label" (set to "department"), "Plural Label" (set to "departments"), "Object Name" (set to "department"), and "Description". There are also checkboxes for "Starts with vowel sound" and "Consent-Sensitive Help Setting".
- Enter Record Name Label and Format:** This section includes a "Record Name" field (set to "Department Name") and a "Data Type" dropdown (set to "Text").
- Optional Features:** This section includes checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing".
- Object Classification:** This section includes checkboxes for "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access".
- Deployment Status:** This section includes checkboxes for "In Development" and "Deployed".
- Search Status:** This section includes a checkbox for "Allow Search".
- Object Creation Options:** This section includes checkboxes for "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".

At the bottom of the form are buttons for "Save", "Save & New", and "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

Help for this Page

Step 3 of 6

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

Field Label  
college

Field Name  
college

Description

Help Text

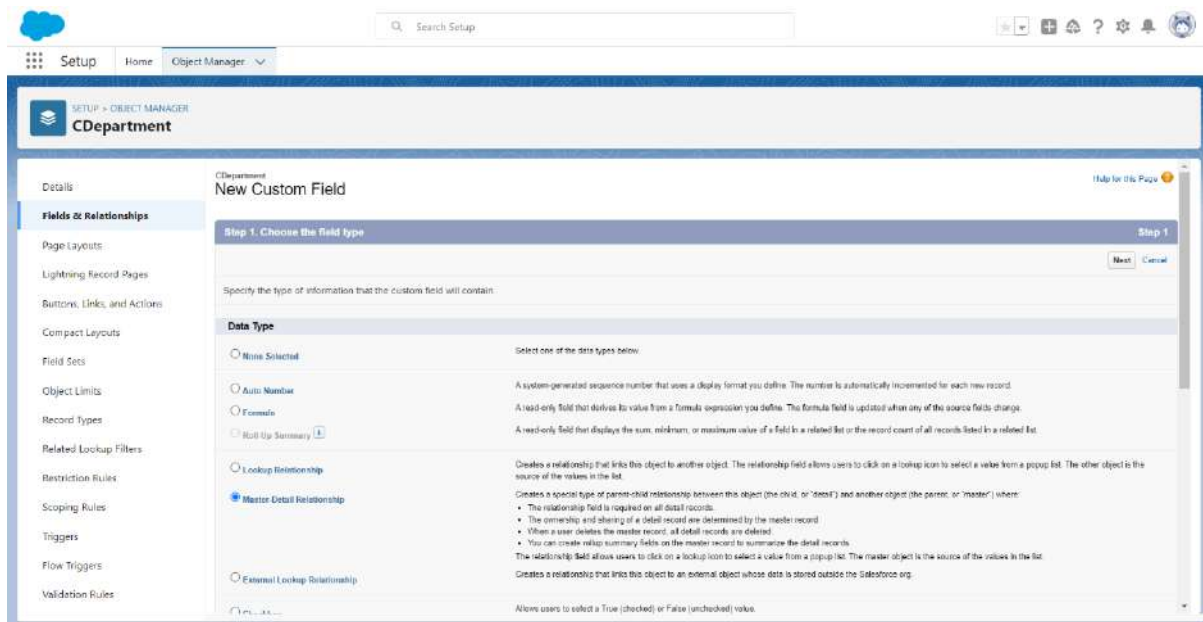
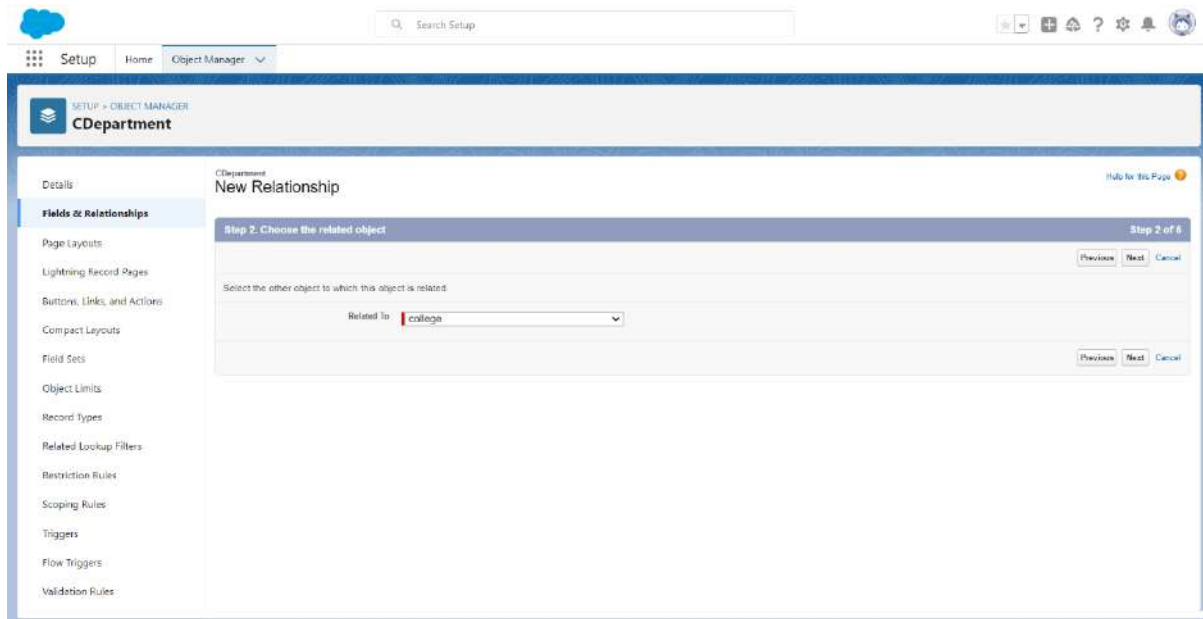
Child Relationship Name  
CDepartments

Sharing Setting  
Read Only. Allows users with at least Read access to 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.  
☐ Child records can be reparented to other parent records after they are created.  
☒ Add this field to existing custom report types that contain this entry.

Auto add to custom report type

Lookup Filter

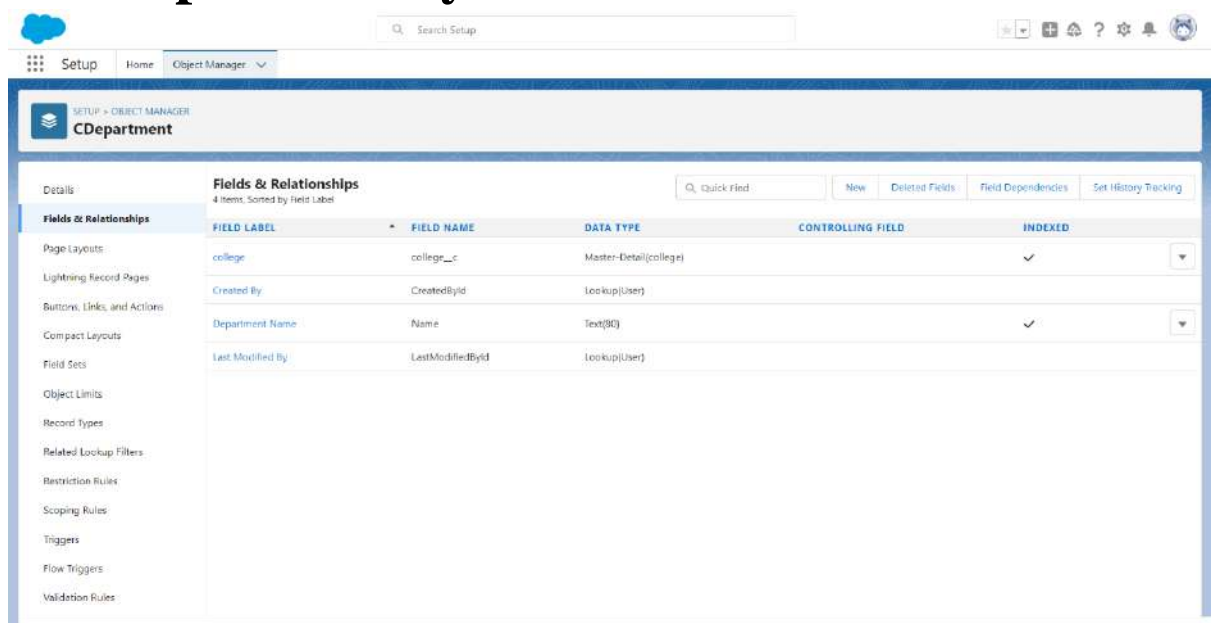


**Step 3: Create the Roll-Up Summary Field**

**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.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The main content area is titled 'SETUP > OBJECT MANAGER' and 'CDepartment'. On the left, a sidebar lists various setup categories, with 'Fields & Relationships' selected. The main panel displays a table of fields for the 'CDepartment' object, sorted by field label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Four fields are listed: 'college' (Master-Detail relationship to 'collegex'), 'Created By' (Lookup to User), 'Department Name' (Text field), and 'Last Modified By' (Lookup to User).

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



The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'college' object is selected. The left sidebar lists various setup categories: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'New Custom Field' and shows 'Step 6, Add to page layouts'. It includes a table with field details: Field Label (Total count), Data Type (Roll-Up Summary), Field Name (Total\_count), and Description. Below the table, there's a section for selecting page layouts, with a checkbox for 'Add Field' and a list of page layouts including 'college Layout'. Navigation buttons like 'Previous', 'Save & New', 'Save', and 'Cancel' are visible at the bottom.

college

## New Custom Field

Step 6, Add to page layouts

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

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

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

☒ Add Field **Page Layout Name**

- ☒ college Layout

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

SetupHomeObject Manager

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Step 4 of 5

Step 4. Establish field-level security

Field Label: Total count

Data Type: Roll-Up Summary

Field Name: Total\_count

Description:

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

Field-Level Security for Profile	<input type="checkbox"/> Write	<input type="checkbox"/> 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"/>
Finance.com - Axis Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SetupHomeObject Manager

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Step 3 of 5

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: college

Summarized Object: CDepartments

Select Roll-Up Type

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate: Roll-Up Summary

Filter Criteria

☒ All records should be included in the calculation

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

college

Setup

Home

Object Manager

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Step 2. Enter the details

Step 2 of 5

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

Previous

Next

Cancel

college

Setup

Home

Object Manager

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Step 1. Choose the field type

Step 1

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

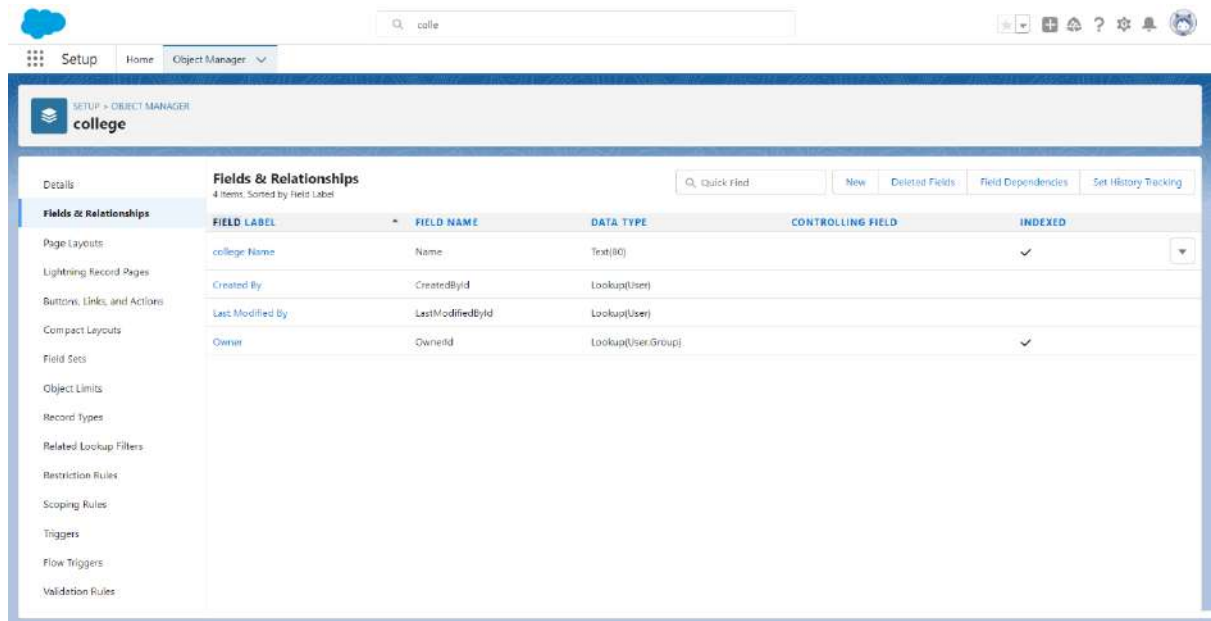
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☐ Picklist

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

Next

Cancel

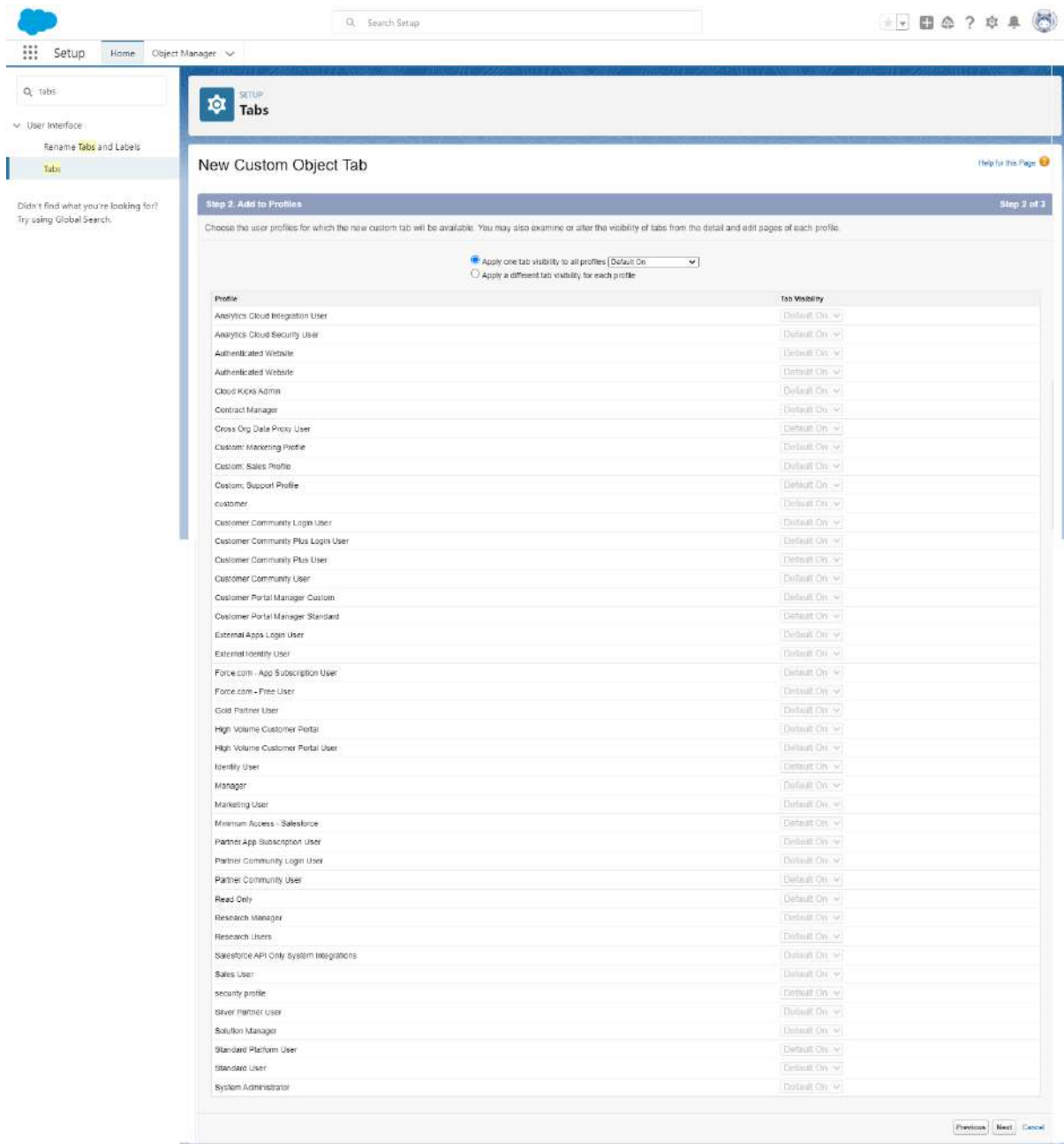


## Step 4: Create a Lightning App

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

10. Assign the app to users or profiles.

11. Test the app with the assigned users.



The screenshot shows the Salesforce Setup interface for configuring a new custom object tab. The page is titled "New Custom Object Tab" and is part of a multi-step process, currently on "Step 2: Add to Profiles".

At the top, there is a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup", "Home", and "Object Manager". The left sidebar shows the "Setup" menu with "User Interface" expanded, and "Rename Tabs and Labels" and "Tabs" options. A message at the bottom of the sidebar says: "Didn't find what you're looking for? Try using Global Search."

The main content area is titled "New Custom Object Tab" and includes a "Help for this Page" link. Below the title, there is a section for "Step 2: Add to Profiles". The instructions state: "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."

There are two radio buttons for visibility settings:

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

Below these options is a table with two columns: "Profile" and "Tab Visibility". The table lists various user profiles, and the "Tab Visibility" column shows a dropdown menu for each, all currently set to "Default On".

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

At the bottom right of the page, there are three buttons: "Previous", "Next", and "Cancel".

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

New Custom Object Tab

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](#)

Objectcollege

Tab StyleAccount

(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 LinkNone

Enter a short description

Description

NextCancel

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

Step 3. Add to Custom Apps

Step 3 of 3

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

Custom App	<input checked="" type="checkbox"/> 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__SalesforceCIS)	<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	

PreviousSaveCancel

Setup

Home

Object Manager

Search Setup

Setup

Home

Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

Help for this Page

New Custom Object Tab

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 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

Setup

Home

Object Manager

Q app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Packaging

Installed Packages

SETUP

Lightning Experience App Manager

New Lightning App

New Connected App

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

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

Setup

Home

Object Manager

User Interface

Rename Tabs and Labels

Tabs

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

SETUP  
Tabs

## Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New | What is This?

Action	Label	Tab Style	Description
Edit   Del	Books1	Box	
Edit   Del	Departments	Lightning	
Edit   Del	colleges	Boxed	
Edit   Del	Research Proposals	Square	
Edit   Del	Students	Box	

Web Tabs

New | What is This?

No Web Tabs have been defined.

Visualforce Tabs

New | What is This?

No Visualforce Tabs have been defined.

Lightning Component Tabs

New | What is This?

No Lightning component tabs have been defined.

Lightning Page Tabs

New | What is This?

No Lightning Page Tabs have been defined.

Setup

Home

Object Manager

Apps

App

App Details & Branding

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

App Details

\* App Name

\* Developer Name

Description

App Branding

Image

Clear

Primary Color Hex Value

Org Theme Options

☒ Use the app's image and color instead of the org's custom theme

Next

Salesforce Online

14 Sales

LightningSales

Manage your sales process with accounts, leads, opportunities, and more

14/07/2023, 10:47 am

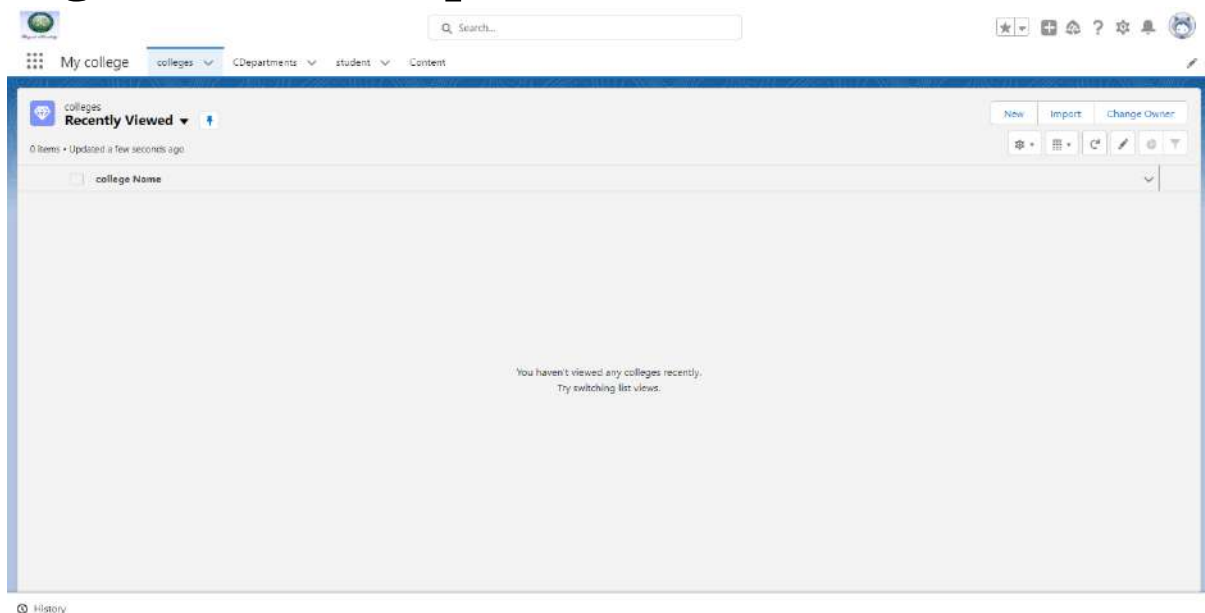
Lightning

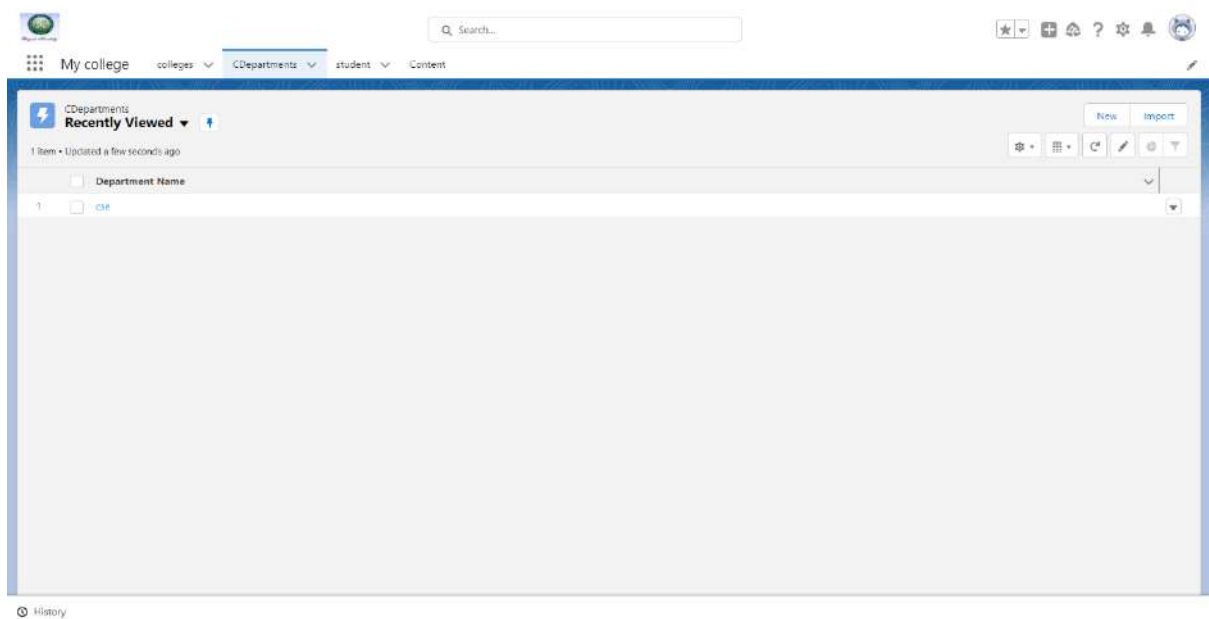
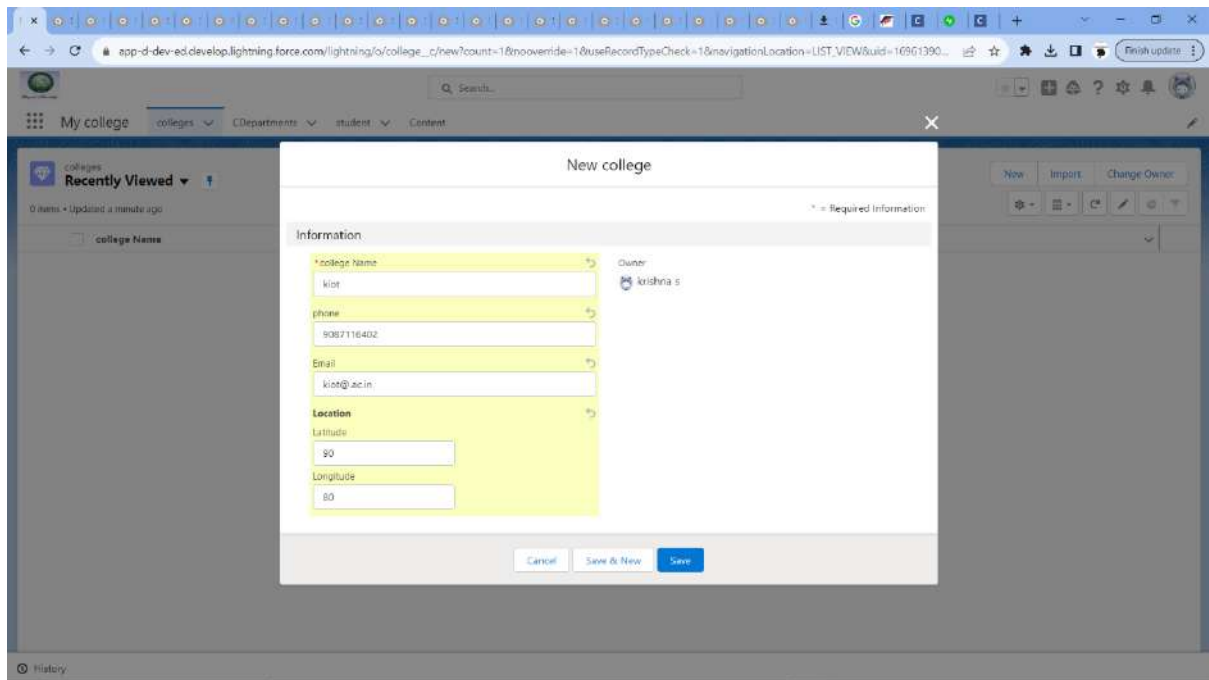


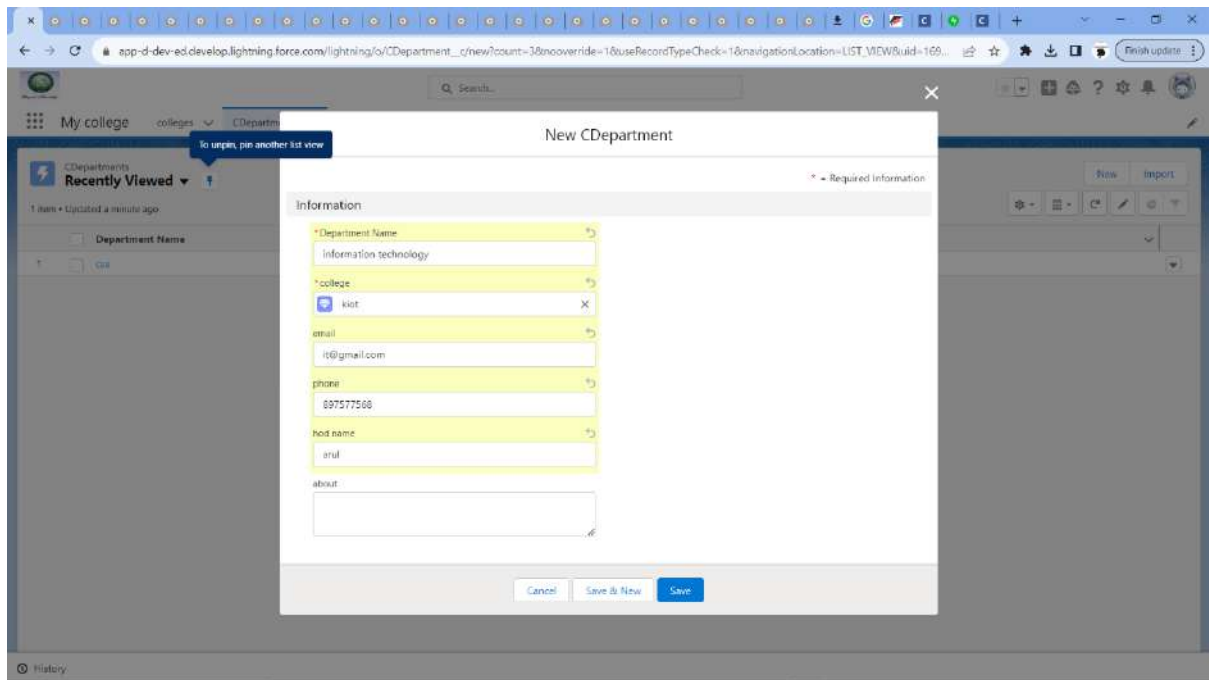
## Conclusion:


**Now, whenever you create or update a record in the "Department\_\_c" related to a "College\_\_c," the "TotalCount\_\_c" field on the "College\_\_c" will automatically update to show the total number of related records.**

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















My collegecollegesCDepartmentsstudentContent

Search...



CDepartment  
information technology

New ContactEditNew Opportunity

RelatedDetails

Department Name  
information technology

college  
klot

email  
it@gmail.com


phone  
887577568

hod name  
arul

about







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

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



My collegecollegesCDepartmentsstudentContent

Search...



college  
klot

New ContactEditNew Opportunity

RelatedDetails

college Name  
klot

Total count  
1

phone  
9087116402


Email  
klot@gmail.com

Location  
90, 80

Owner  
krishna s







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

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



My collegecollegesCDepartmentsstudentContent

Search...



CDepartments  
Recently Viewed

NewImport

1 item • Updated a few seconds ago

Department Name

1cse

History

colleges

Recently Viewed

NewImportChange Owner

1 item • Updated a few seconds ago

college Name

1kiot

college

kiot

New ContactEditNew Opportunity

Related

Details

college Name

kiot

Total count

2

phone

9087116402

Email

kiot@gmail.com

Location

90, 80

Created By

kiotina s. 01/10/2023, 11:16 am

Owner

kiotina s.

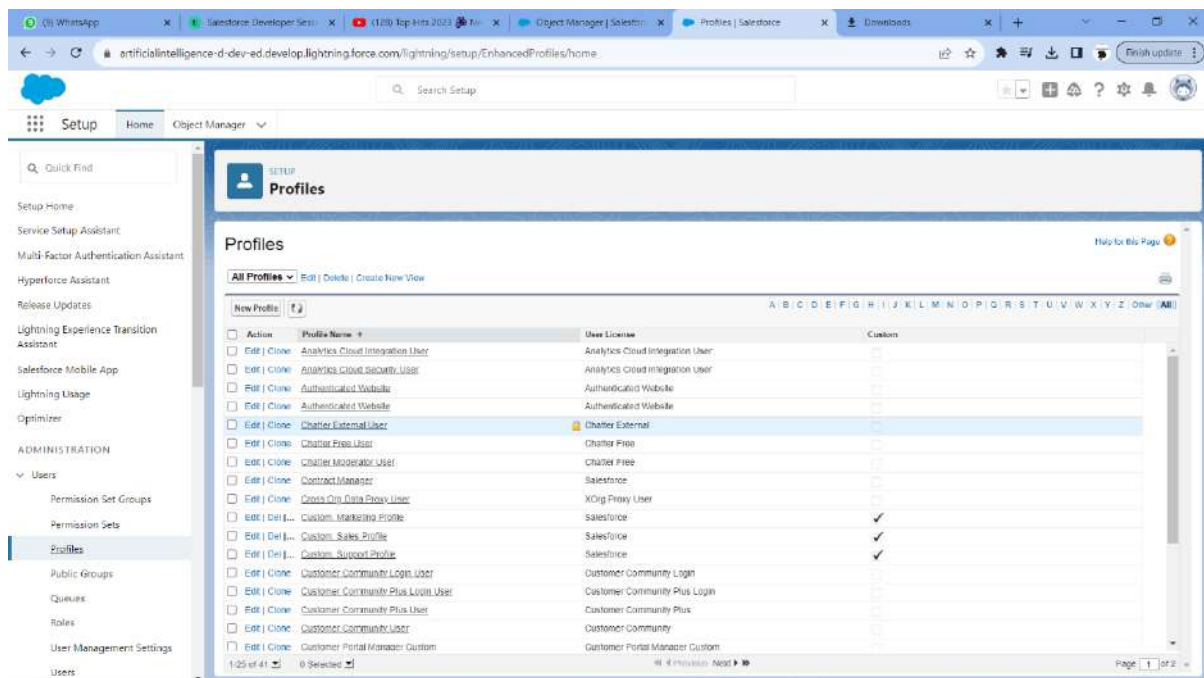
Last Modified By

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

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

Solution:

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



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

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### Profiles

All Profiles | Edit | Delete | Create New View

New Profile | 1

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	SalesManager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	System Administrator	Salesforce	<input type="checkbox"/>

1-7 of 7 | 0 Selected | 4 Columns | Next > | Page 1 of 1

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

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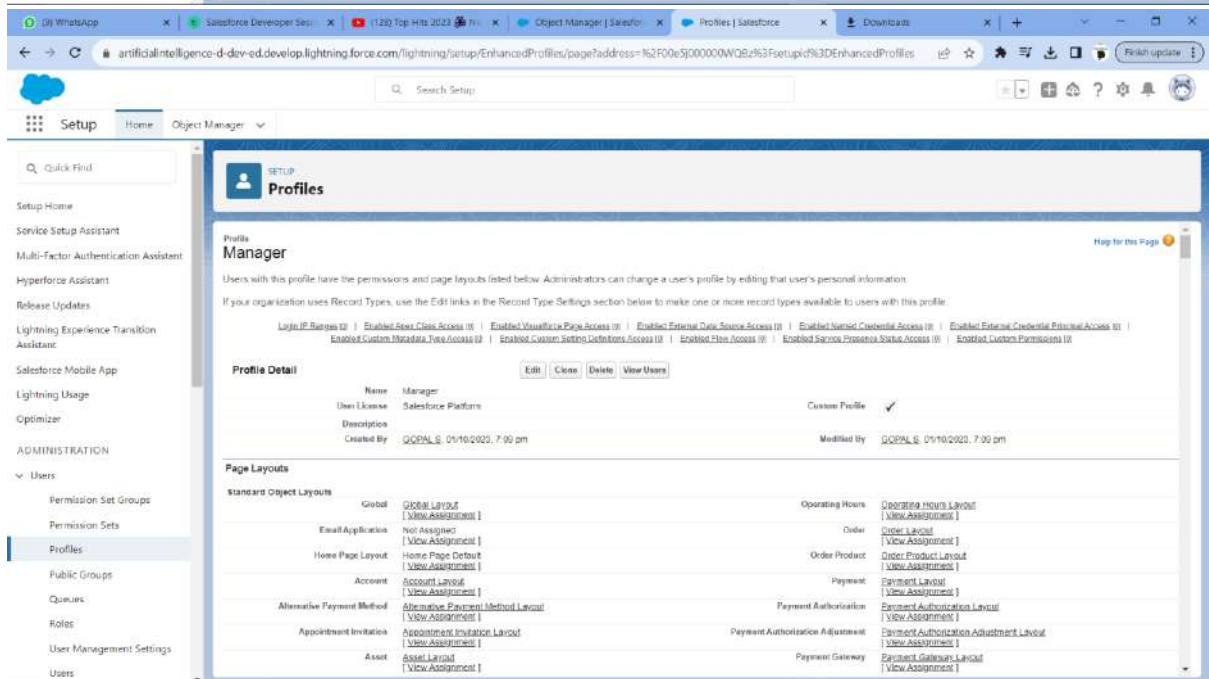
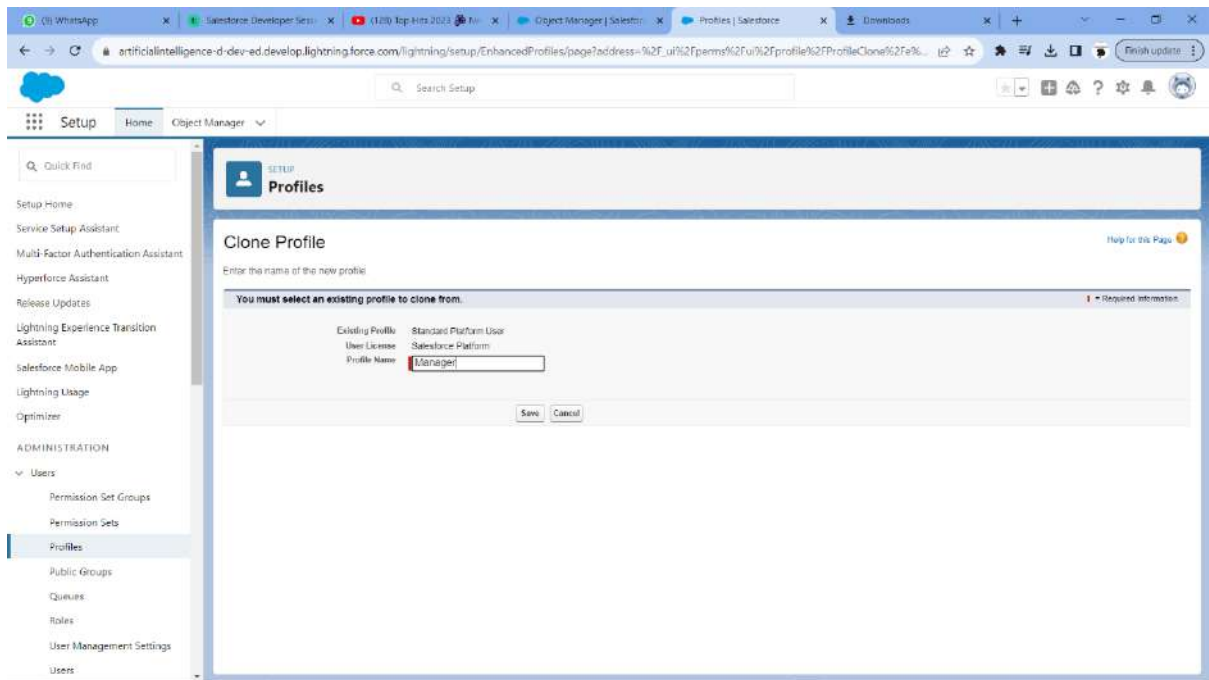
### Clone Profile

Enter the name of the new profile

You must select an existing profile to clone from.

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

Save Cancel





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### Profiles

Manager

Set the permissions and page layouts for this profile

**Profile Edit**

Name: Manager

User License: Salesforce Platform

Description:

Custom Profile: ☒

**Custom App Settings**

	Visible	Default		Visible	Default
Analytics Studio (standard__Analytics)	<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**

☐ Overwrite users' personal tab customizations

Standard Tab Settings

	From	Default On	Learning	Libraries	Lightning Bolt Solutions
Accounts	Default On	<input checked="" type="radio"/>	Default On	Tab Hidden	Default On
Alert Settings	Default On	<input checked="" type="radio"/>			

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### 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"/> <td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td></td></td>	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td></td>	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td>	<input checked="" type="checkbox"/> <td><input type="checkbox"/><td><input type="checkbox"/></td></td>	<input type="checkbox"/> <td><input type="checkbox"/></td>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td></td></td>	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td></td>	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td>	<input checked="" type="checkbox"/> <td><input type="checkbox"/><td><input type="checkbox"/></td></td>	<input type="checkbox"/> <td><input type="checkbox"/></td>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td></td></td>	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td></td>	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td>	<input checked="" type="checkbox"/> <td><input type="checkbox"/><td><input type="checkbox"/></td></td>	<input type="checkbox"/> <td><input type="checkbox"/></td>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/> <td><input type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td></td></td>	<input type="checkbox"/> <td><input type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td></td>	<input type="checkbox"/> <td><input type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td>	<input type="checkbox"/> <td><input type="checkbox"/><td><input type="checkbox"/></td></td>	<input type="checkbox"/> <td><input type="checkbox"/></td>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td></td></td>	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td></td>	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td>	<input checked="" type="checkbox"/> <td><input type="checkbox"/><td><input type="checkbox"/></td></td>	<input type="checkbox"/> <td><input type="checkbox"/></td>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td></td></td>	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td></td>	<input checked="" type="checkbox"/> <td><input checked="" type="checkbox"/><td><input type="checkbox"/><td><input type="checkbox"/></td></td></td>	<input checked="" type="checkbox"/> <td><input type="checkbox"/><td><input type="checkbox"/></td></td>	<input type="checkbox"/> <td><input type="checkbox"/></td>	<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 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"/>
customers	<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

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	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"/>	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"/>	
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"/>	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"/>	
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"/>	User External Credentials	<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"/>	Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									

#### Session Settings

Session Times Out After:

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 answers for password resets: ☐

Requires a minimum 1 day password lifetime: ☐

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

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	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"/>	Enhancement Requests	<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"/>									

#### 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 answers for password resets: ☐

Requires a minimum 1 day password lifetime: ☐

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

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### 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 type="checkbox"/>	<input type="checkbox"/>
customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<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 login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password: ☐

Requires a minimum 1 day password: ☐

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

## Users

### All Users

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

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

View: [All Users](#) | [Create New User](#)

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit   Login	Adriana Chiv	adrian	test_chiv_pas_def@pdxhulk.hzrnsbkox.3g8ofhczvms.h43hazwfmia@gmail.com		<input checked="" type="checkbox"/>	Users User
<input type="checkbox"/> Edit	Chatter Enzel	Chatter	chattv-005000006cokkxat.b00fwmvobe@chattersalesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit   Login	Elindon Amelia	aeli	amelia.elindon.1.48xsc6oodh.05owpdcupwh.tbndemvshfzr.ayucdar1.dely@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	3-SCRAL	33	hsq220@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@005000006caksab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	usay10security@005000006caksab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

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### 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: ☐  
Str.com Contributor User: ☐  
Str.com Publisher User: ☐  
WDC User: ☐  
Data.com User Type: --None--  
Data.com Monthly Addition Limit: Default Limit (200)  
Accessibility Mode (Classic Only): ☐  
High Contrast Palette on Charts: ☐  
Load Lightning Pages While Scrolling: ☒  
Debug Mode: ☐

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### New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name: Sowmya  
Last Name: Iyala  
Alias: soala  
Email: 2k20cse175@kiot.ac.in  
Username: 2k21n@kiot.ac.in  
Nickname: User169616771282564528  
Title: worker  
Company: kiot bank  
Department:  
Division:

Role: <None Specified>  
User License: Salesforce Platform  
Profile: Manager  
Active: ☒  
Marketing User: ☐  
Offline User: ☐  
Knowledge User: ☐  
Flow User: ☐  
Service Cloud User: ☐  
Str.com Contributor User: ☐  
Str.com Publisher User: ☐  
WDC User: ☐  
Data.com User Type: --None--  
Data.com Monthly Addition Limit: Default Limit (200)  
Accessibility Mode (Classic Only): ☐  
High Contrast Palette on Charts: ☐  
Load Lightning Pages While Scrolling: ☒  
Debug Mode: ☐

Browser tabs: WhatsApp, Salesforce Developer, (1/8) Top Hits, Object Manager | Salesforce, Users | Salesforce, Downloads.

URL: [artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055J0000A4LxvGN%3Fnooredirect%3D156266isUserEntryO...](https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055J0000A4LxvGN%3Fnooredirect%3D156266isUserEntryO...)

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### Users

User: **sowmiya bala**

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail

Name	sowmiya bala	Role	Salesforce Platform
Alias	sba18	User License	Platform
Email	2620cse17a@sat.ac.in (Verify)	Profile	Manager
Username	26210@MOL.AC.IN	Active	<input checked="" type="checkbox"/>
Nickname	User16961677128256422616	Marketing User	<input type="checkbox"/>
Title	worker	Offline User	<input type="checkbox"/>
Company	kkt bank	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Sales.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input checked="" type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registrations: One-Time Password Authenticator	<input type="checkbox"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	<input type="checkbox"/>	Salesforce CRM Content User	<input checked="" type="checkbox"/>

Browser tabs: WhatsApp, Salesforce Dev..., (1/8) Top Hits, Object Manager, Users | Salesforce, Downloads, Welcome to Sa..., Reset Passwor...

URL: [mail.google.com/mail/u/0/#inbox/7MfopzGtsStlSsqKkLzCGhbDnsCkxvI](mailto:support@salesforce.com)

Gmail

Compose

Mail

Chat

Spaces

Meet

Inbox 5,318

- Starred
- Snorced
- Sent
- Drafts
- More

Labels

Search in mail

Active

1 of 6,456

support@salesforce.com <support@salesforce.com>

7:15 PM (0 minutes ago)

to: me

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:


[26210@kkt.ac.in](mailto:26210@kkt.ac.in)

Again, welcome to Salesforce!

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



### 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


\* Answer:

[Change Password](#)

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

Login | Salesforce

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



Username

Password


[Log In](#)

☐ Remember me

[Forgot Your Password?](#)

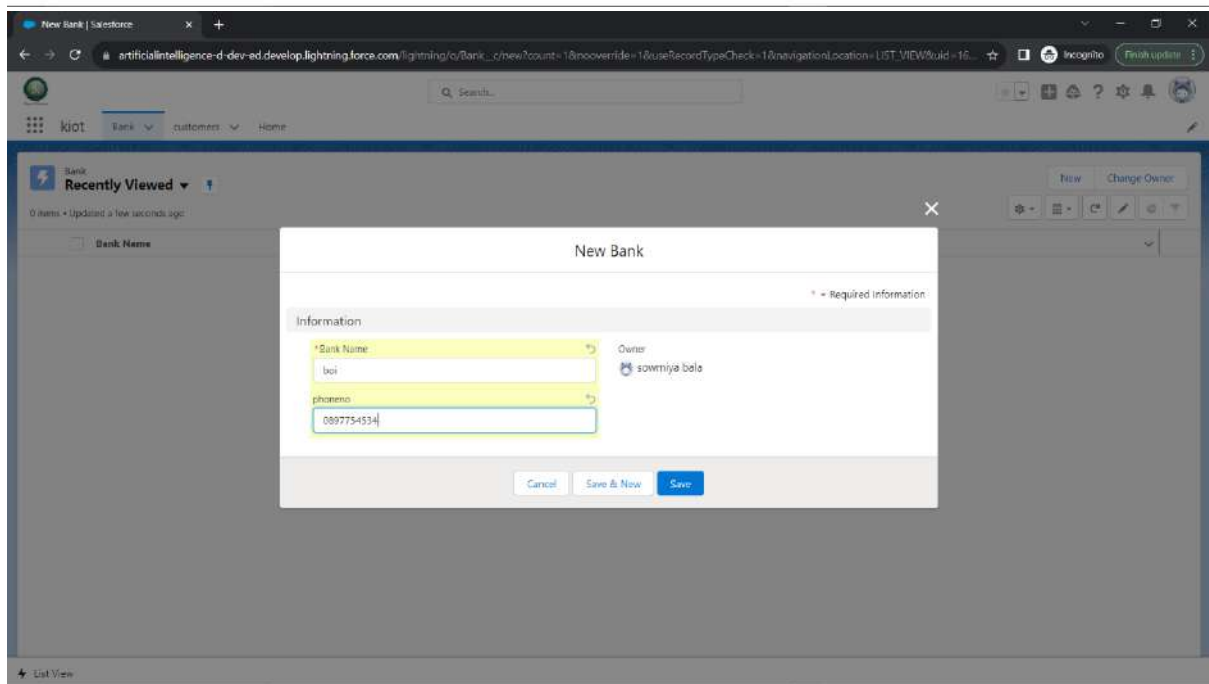
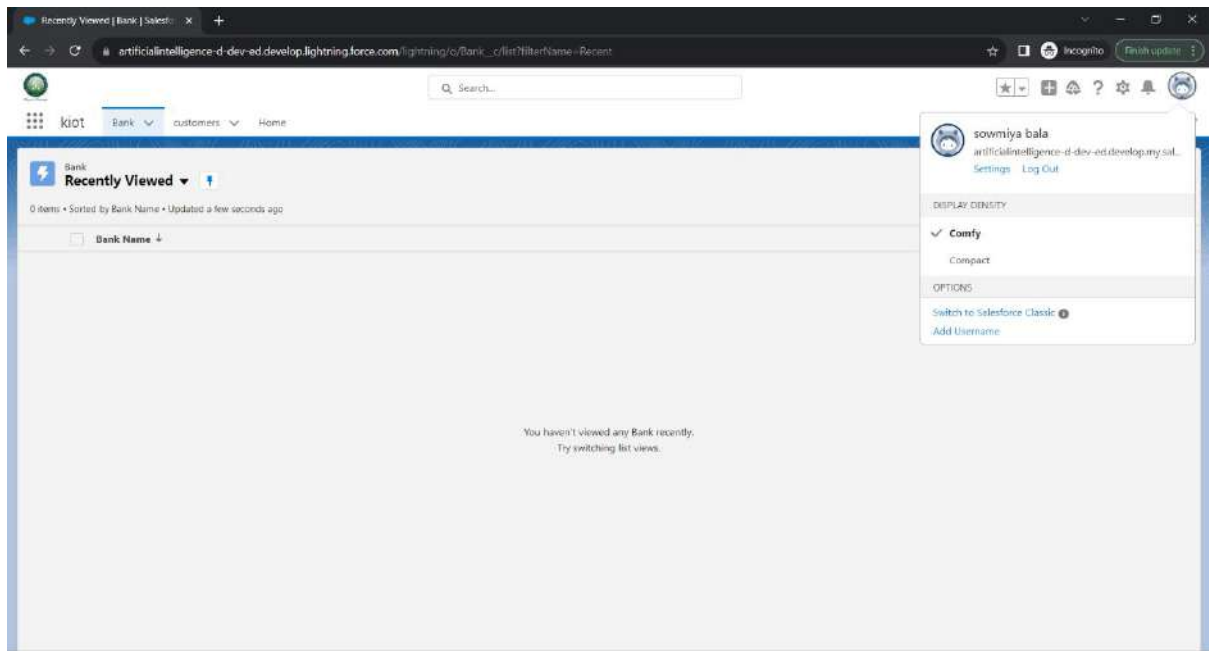
Join us for the future of trusted enterprise AI, streaming on Salesforce+.

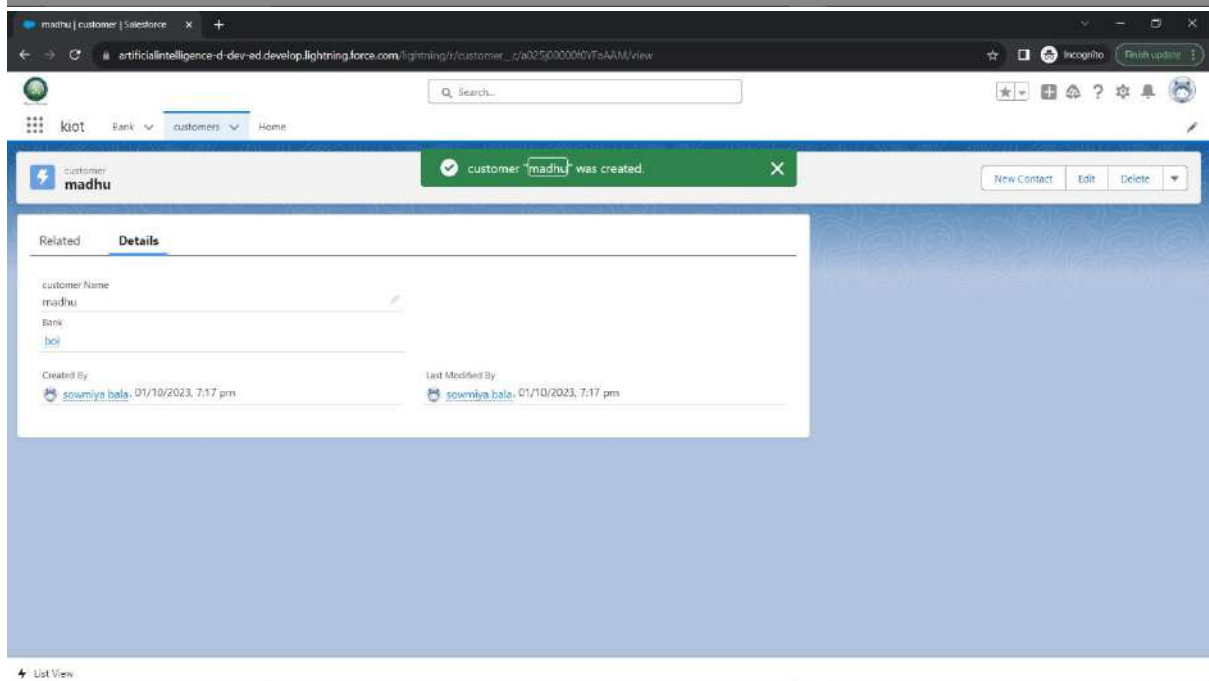
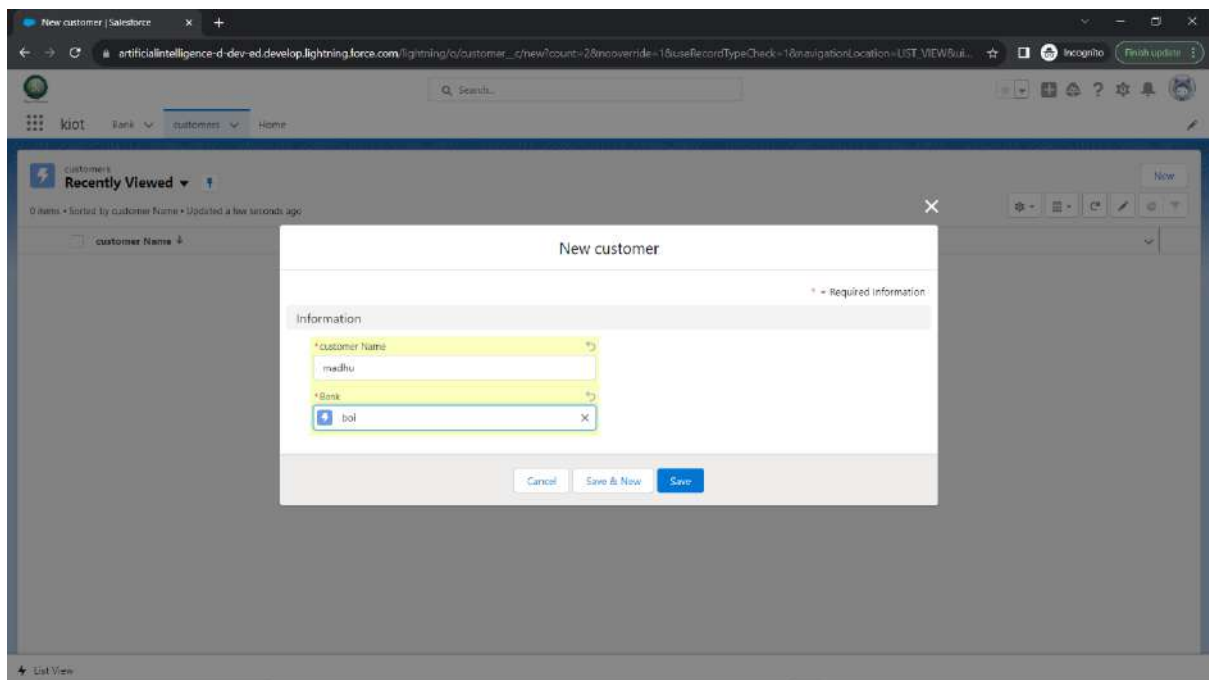
[WATCH ON DEMAND](#)



# AI Day

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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

## Profiles

All Profiles | Edit | Delete | Create New View

New Profile | 1/2

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	SalesManager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Sales 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

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## 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: salesmanager

Save Cancel

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

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### Profiles

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.

Log In IP Ranges (2) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled External Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Provider Status Access (0) | Enabled Custom Permissions (0)

**Profile Detail** Edit Clear Delete View Users

Name	salesmanage	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	QOPAL S. 01/10/2020, 7:10 pm	Modified By	QOPAL S. 01/10/2020, 7:10 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%3FretURL%3D%2F00e5j000000WQCE%3Fsetupid%3DEnhancedPr...

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### Profiles

salesmanage

Set the permissions and page layouts for this profile.

**Profile Edit** Save Save & New Cancel

Name salesmanage  
User License Salesforce Platform  
Description

Custom Profile ✓

**Custom App Settings** Required Information

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

**Service Provider Access**

**Tab Settings**

☐ Override user's personal tab customizations

**Standard Tab Settings**

Name	Default On	Learning	Default On
Access	7:00 a.m. - 7:00 p.m.	Access	7:00 a.m. - 7:00 p.m.

Salesforce Setup: Profiles

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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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 in forgot password emails: ☐

Salesforce Setup: Profiles

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 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"/>
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Enhancement Requests	<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 checked="" type="checkbox"/>	<input type="checkbox"/>

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Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

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

Buttons: Save, Save & New, Cancel

Setup Home Object Manager

Search Setup

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Prospector Users

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## 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

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Str.com Contributor User

Str.com Publisher User

WDC User

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only)

High Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

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## 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

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Str.com Contributor User

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Setup Users

Mailing Address

Street

City

Zip/Postal Code

Status/Province

Country

Single Sign On Information

Federation ID

Locale Settings

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

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Recycle Approval Request Emails Only if I am an approver

Generate new password and notify user immediately

Save Save & Now Cancel

Setup Home Object Manager

Search Setup

user

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Setup Users

Mailing Address

Street 4/104, aryanpatayam, uthamasalapuram...

City SALEM

Zip/Postal Code 636308

Status/Province 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

Delegated Approver

Manager

Recycle Approval Request Emails Only if I am an approver

Generate new password and notify user immediately

Save Save & Now Cancel



Setup Home Object Manager

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User Detail

Name: madhu b  
Alias: mb  
Email: 2k20cs17s@kict.ac.in (Madhu)  
Username: 2k20cs17s@kict.ac.in  
Nickname: User1691684242865419206  
Title: worker  
Company: kkt bank  
Department: Sales  
Division:  
Address: 4154, arampalayam, ulamasapuram,, Parakkadu, salem- 636308, SALEM 636308, TAMIL NADU  
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English  
Manager:  
Delegated Approver:  
Receive Approval Request Emails: Only if I am an approver  
Federation ID:  
App Registration One Time Password Authentication:  
Role: Salesforce Platform User License  
Profile: salesmanager  
Active: ☒  
Marketing User: ☐  
Offline User: ☐  
Knowledge User: ☐  
Flow User: ☐  
Service Cloud User: ☐  
Site.com Contributor User: ☐  
Share.com Publisher User: ☐  
Web User: ☐  
Mobile Push Registrations: ☒  
Data.com User Type: ☐  
Accessibility Mode (Classic Only): ☐  
Debug Mode: ☐  
High-Contrast Palette on Charts: ☐  
Load Lightning Pages While Scrolling: ☒

mail.google.com/mail/u/0/#inbox/TMf0gzGnStlSsqKkLzCGhbDnsCkxvI

Search in mail

Active

Compose

Inbox 5,318

Starred

Snoozed

Sent

Drafts

More

Labels

1 of 6,456

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:  
[2k20cs17s@kict.ac.in](mailto:2k20cs17s@kict.ac.in)

Again, welcome to Salesforce!

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

Reply Forward

Change Your Password | Salesforce

artificialintelligence-d-dev-ed.develop.my.salesforce.com/.../system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp%3FfromFrontdoor=1&stupid=ChangePa...

**salesforce**

### Change Your Password

Enter a new password for 2k20cit@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 01/10/2023, 7:24 pm.

Recently Viewed | Bank | Sales

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

kiot

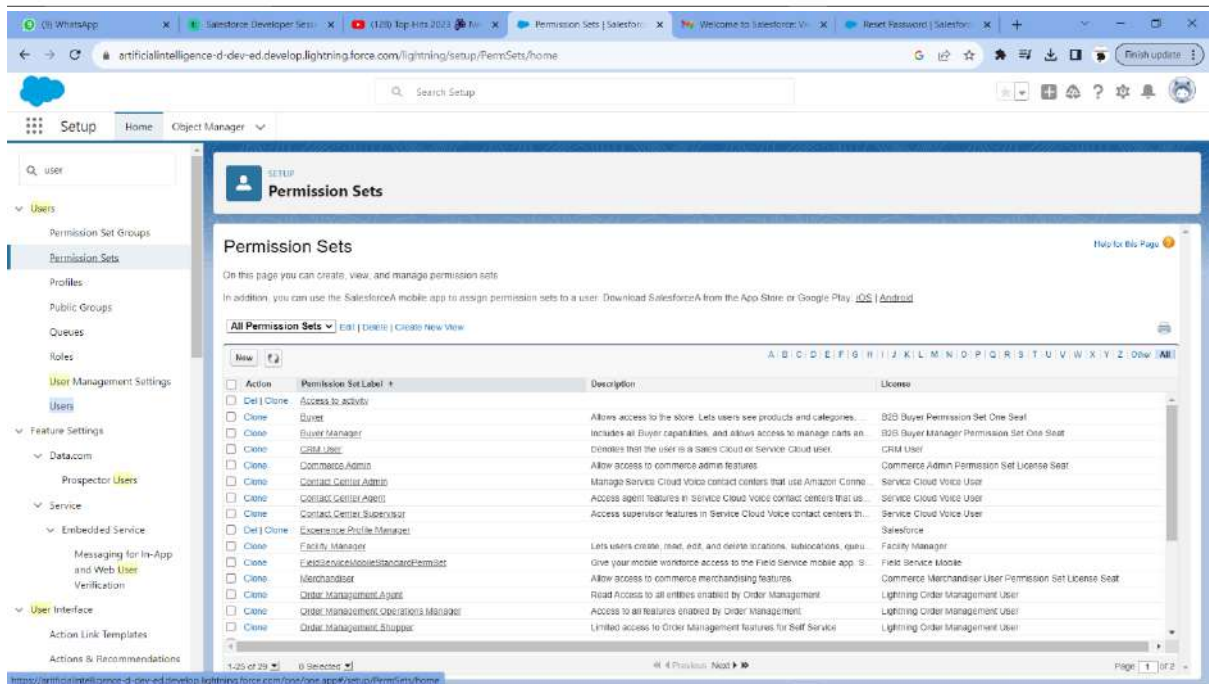
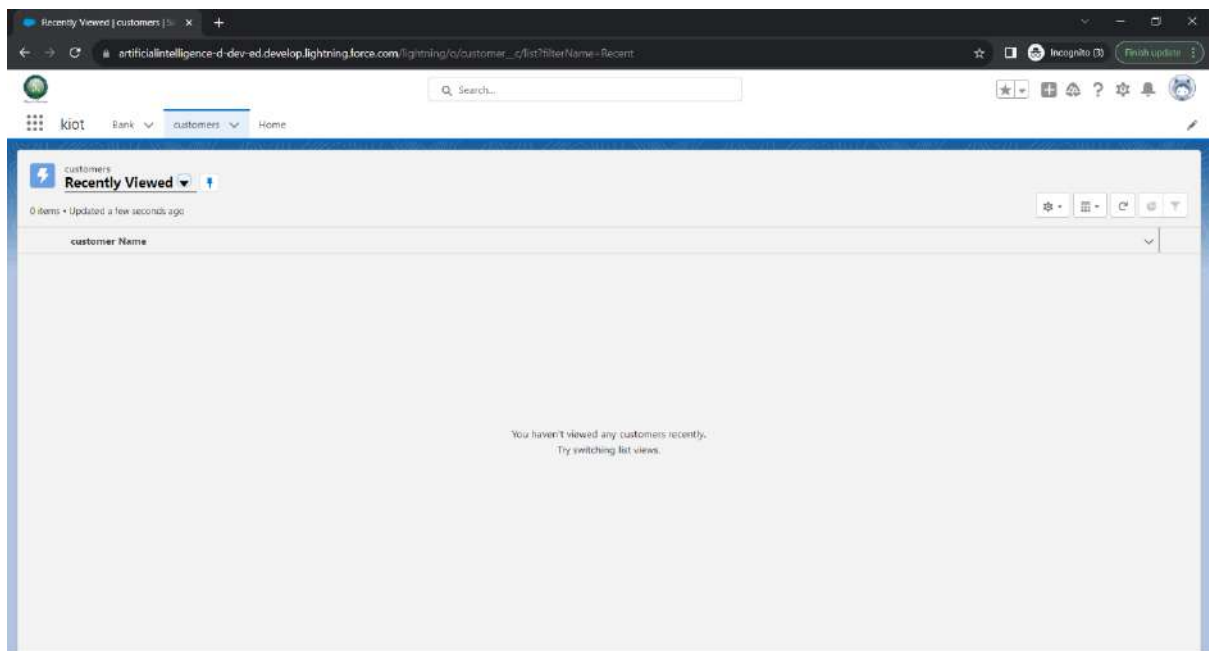
Bank

customers

Home

Search...

★





## 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:

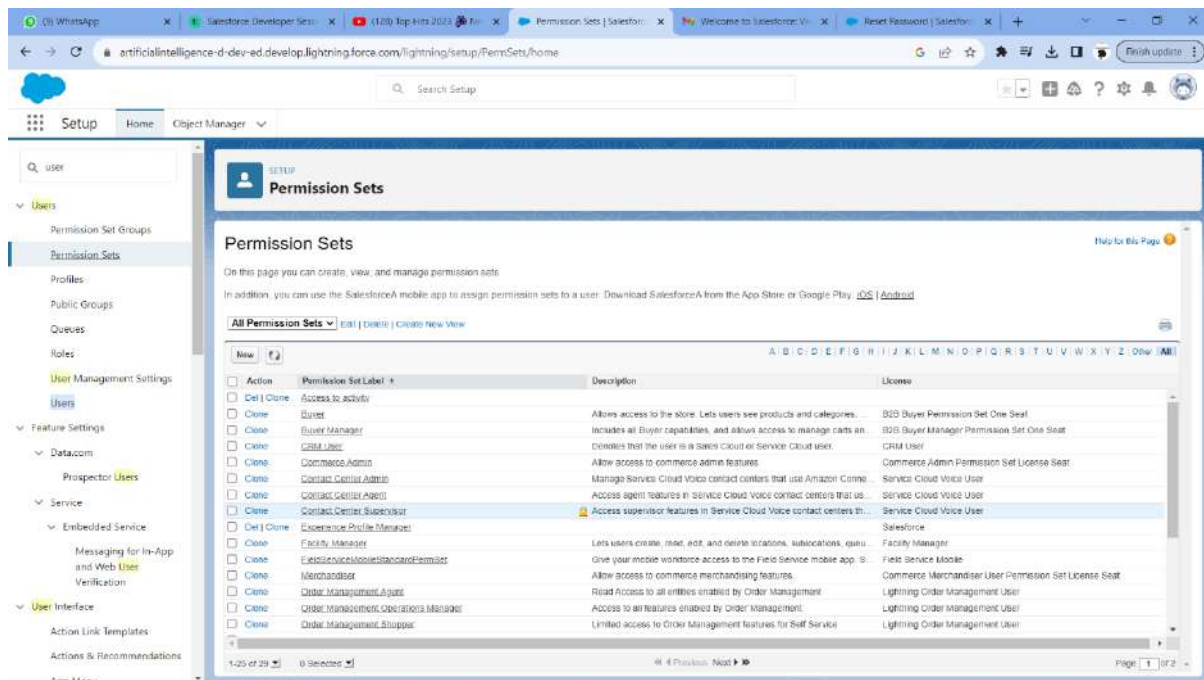
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## 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/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

user

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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/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

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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

Setup Home Object Manager

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Permission Set: salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name
License	salesmanager
Session Activation Required	None
Last Modified By	GOPIAL S. 01/10/2023, 7:29 pm

Apps

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

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

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

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

Apex Class Access  
Permissions to execute Apex classes

Visualforce Page Access  
Permissions to execute Visualforce pages

External Data Source Access  
Permissions to authenticate against external data sources

Flow Access  
Permissions to execute Flows

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform  
[Learn More](#)

Setup Home Object Manager

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Permission Set: salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	—
AI Insight Reasons	No Access	—	—
AI Recent Insights	No Access	—	—
Alternative Payment Methods	No Access	27	—
API Anomaly Event Stores	No Access	14	—
App Analytics Query Requests	No Access	—	—
Application Usage Assessments	No Access	—	—
Appointment Categories	No Access	9	—
Appointment Invitations	No Access	17	—
Appointment Inviteds	—	4	—
Appointment Schedule Assignments	No Access	—	—
Appointment Schedule Logs	No Access	—	—
Appointment Topic Time Slots	No Access	6	—
Asset Actions	No Access	50	—
Asset Action Sources	No Access	18	—
Asset Relationships	—	10	—
Assets	No Access	42	—
Asset Sizing Periods	No Access	11	—

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55000000Phok%3F%3DEntityPermissions%26o%3D...

Setup Home Object Manager

user

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Permission Sets

Permission Set: salesmanager

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank Edit

Tab Settings

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

Object Permissions

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

Field Permissions

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55000000Phok%3F%3DEntityPermissions%26o%3D...

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Permission Sets

Permission Set: salesmanager

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank Save Cancel

Tab Settings

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/000000Phok/PermissionSetAssignment/home

Setup Home Object Manager

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salesmanager

### Current Assignments

No assignments defined.

Add Assignment

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/000000Phok/PermissionSetAssignment/new

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### Select Users to Assign

All Users

1 item selected

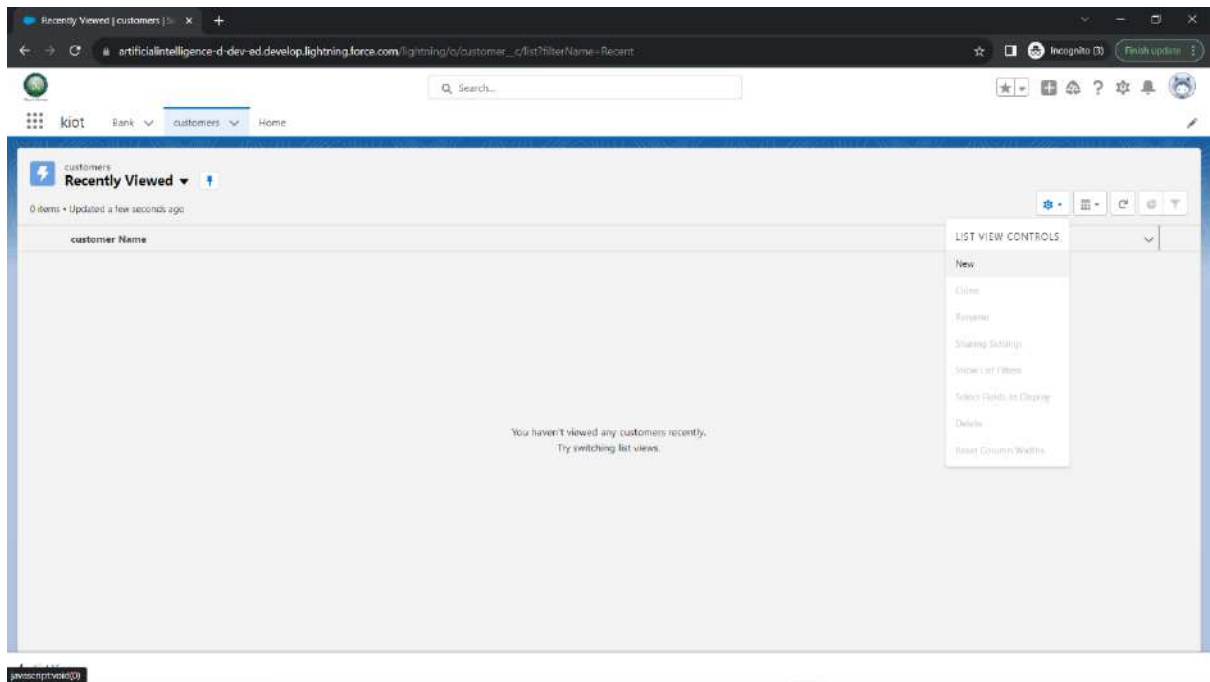
Search this list...

	Full Name	All...	Username	Role	Ac...	Profile
<input type="checkbox"/>	Amelia Ellington	aelli	amelia.ellington.146nxp80cdih.d6cxpdcou4whfmbdammmhahqarguctprfdalv@gmail.com	<input checked="" type="checkbox"/>		Force.com - App Subscription User
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.60d50000bckkxab.3c0bhwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>		Chatter Free User
<input type="checkbox"/>	Diya Adanne	ddadan	test_diya_pas.4w6b7yb9wik.togrgtbkpx.3gilolovouns.N43bkwelmea@gmail.com	<input checked="" type="checkbox"/>		UIMS User
<input type="checkbox"/>	GOPAL S	GS	kiots20@gmail.com	<input checked="" type="checkbox"/>		System Administrator
<input type="checkbox"/>	Integration User	integ	integration@000d3j000000bckkxab.com	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
<input checked="" type="checkbox"/>	maithu b	mb	2k20cch@idiot.ac.in	<input checked="" type="checkbox"/>		salesmanager
<input type="checkbox"/>	Security User	sec	insightssecurity@000d3j000000bckkxab.com	<input checked="" type="checkbox"/>		Analytics Cloud Security User
<input type="checkbox"/>	sovmiya bala	sbala	2k21h4@idiot.ac.in	<input checked="" type="checkbox"/>		Manager

Cancel Next







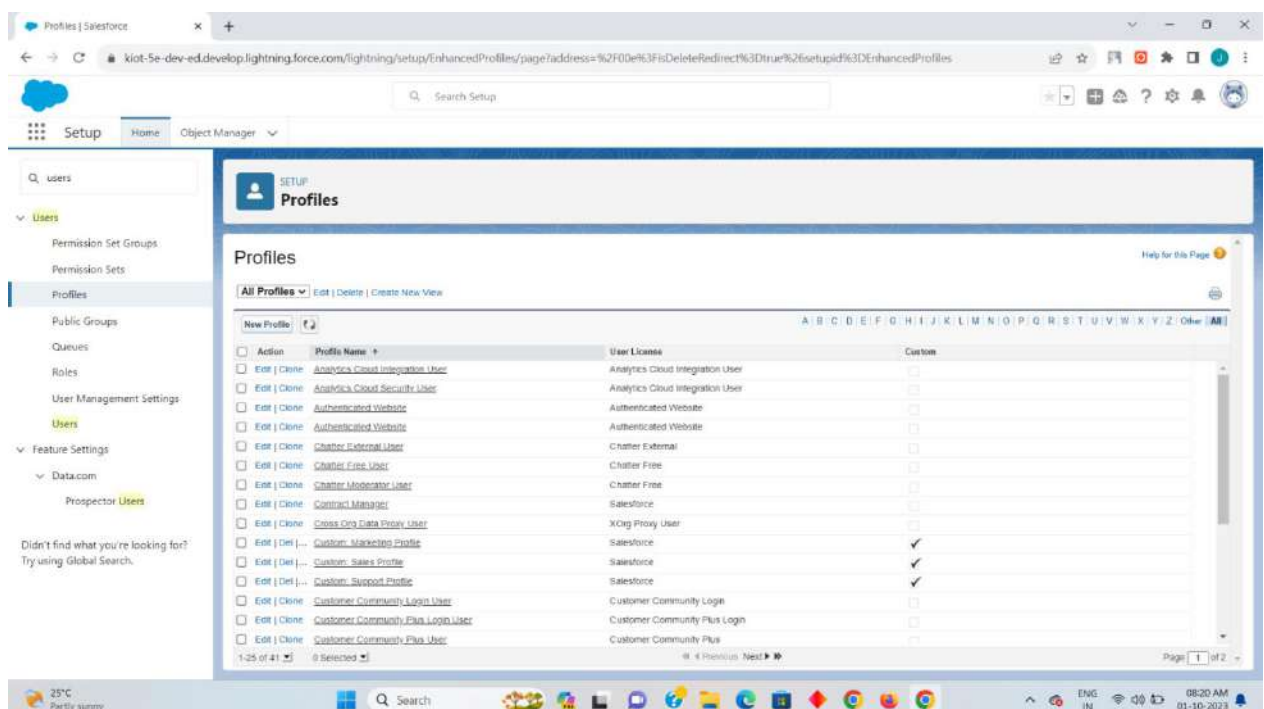


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

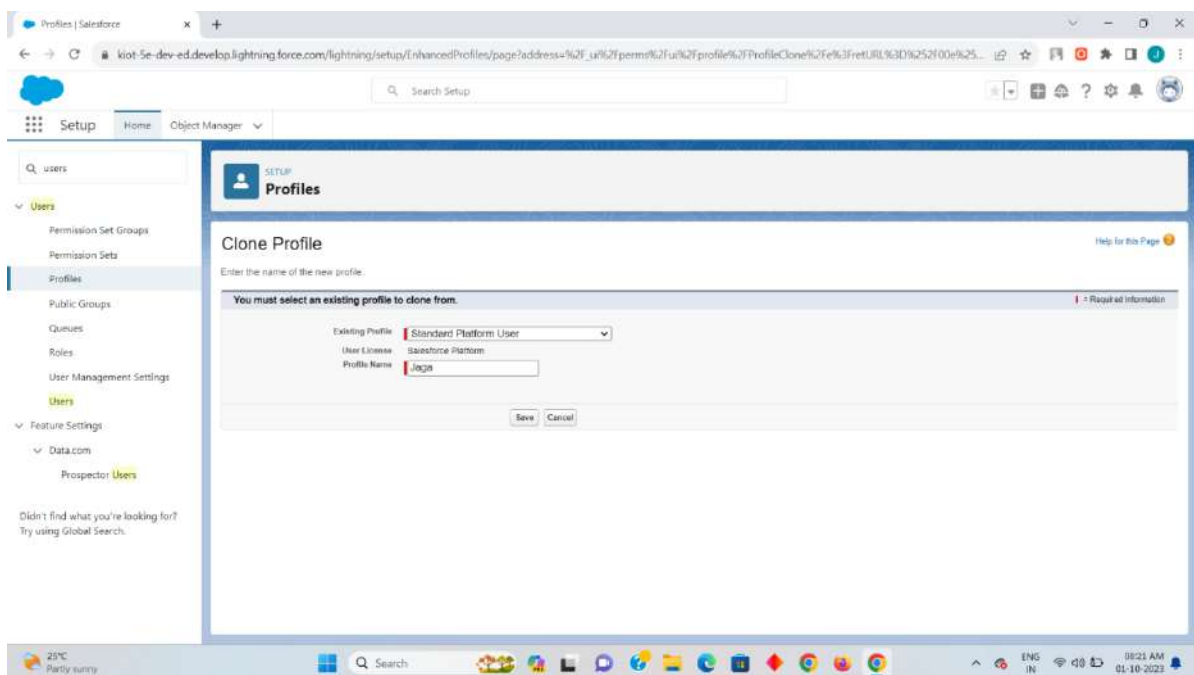
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

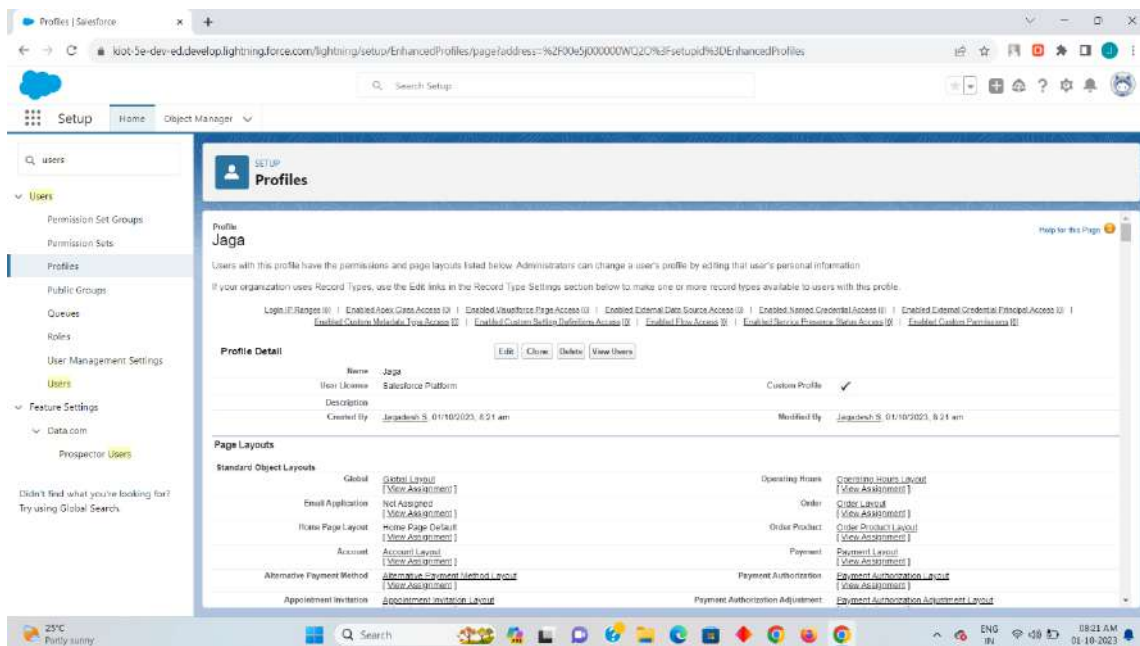
Click on the new to create a new profile along with the label and Api



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

## Step 3:

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



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, and Data.com. The main content area displays the 'Profile: Jaga' details. It includes a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. Below this is the 'Page Layouts' section, which lists various layouts for different objects, including Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Operating Hours, Order, Order Product, Payment, Payment Authorization, and Payment Authorization Adjustment. The 'Custom Profile' checkbox is checked.

Profile: Jaga

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.

Log In Ranges | Enabled Apex Class Access | Enabled Salesforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Reference Access | Enabled Flow Access | Enabled Service Resource Sign Access | Enabled Custom Permissions

**Profile Detail**

Field	Value
Name	Jaga
User License	Salesforce Platform
Description	
Created By	Jagadeesh S. 01/10/2023, 8:21 am
Modified By	Jagadeesh S. 01/10/2023, 8:21 am

**Page Layouts**

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

The screenshot shows the Salesforce Lightning Setup page for Profiles. The page is titled "Profiles" and has a sub-header "SETUP". The left sidebar shows the navigation menu with "Profiles" selected. The main content area displays a table of permissions for the "Profiles" profile. The table has columns for "Read", "Create", "Edit", "Delete", "View All", and "Modify All". The "Profiles" profile has all permissions checked. Below the table, there are sections for "Custom Object Permissions" and "Session Settings".

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

**Custom Object Permissions**

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

**Session Settings**

Session Timeout (in minutes): 2 hours of inactivity

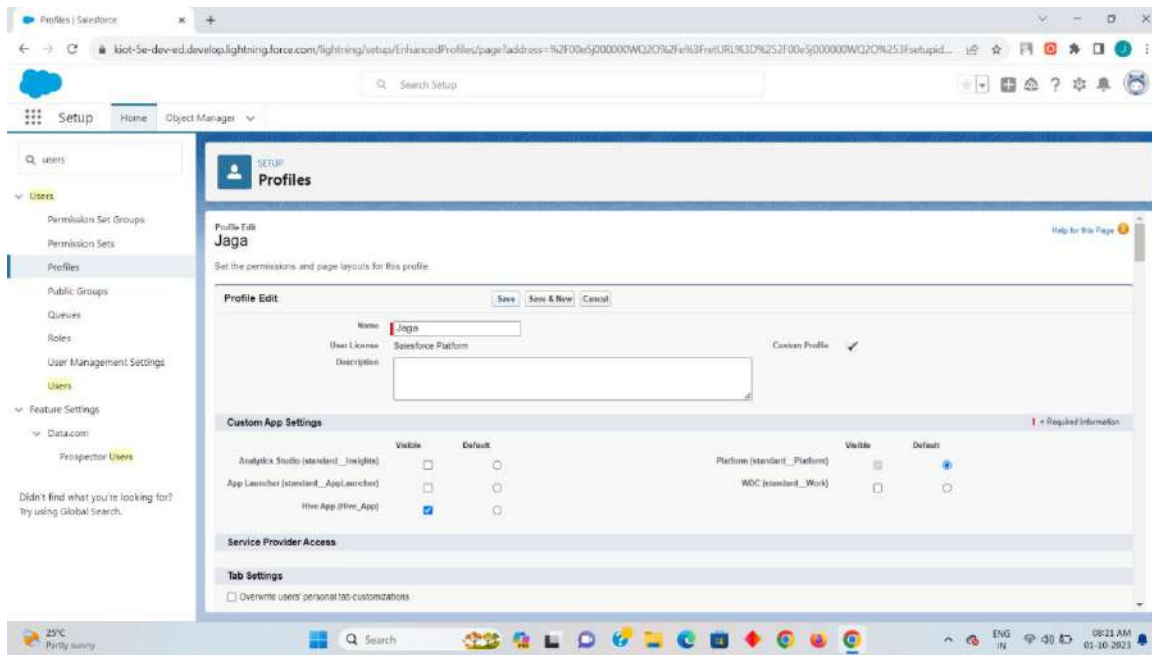
Session Security Level (Display of Login): --None--

Enable different Experience Cloud login policies for employees: ☒

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

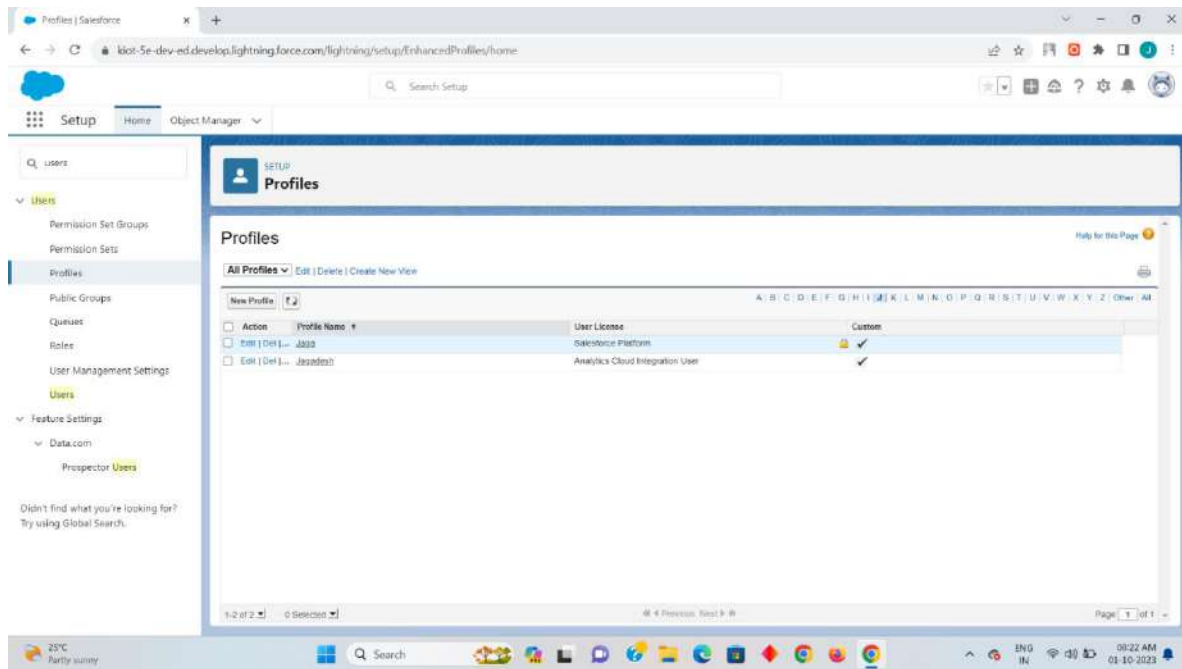
Relax login IP restrictions: ☒

Skip employee device activation during Experience Cloud site login: ☒



## Step 4

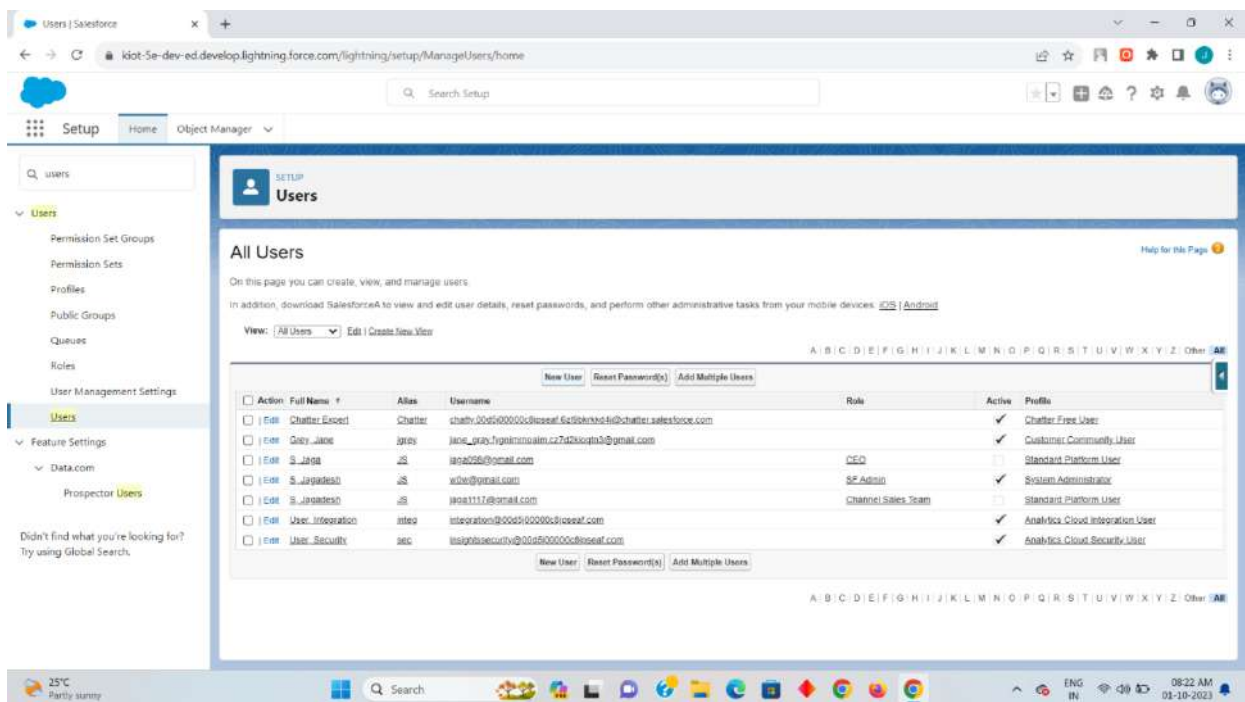
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it



## Step 5:

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

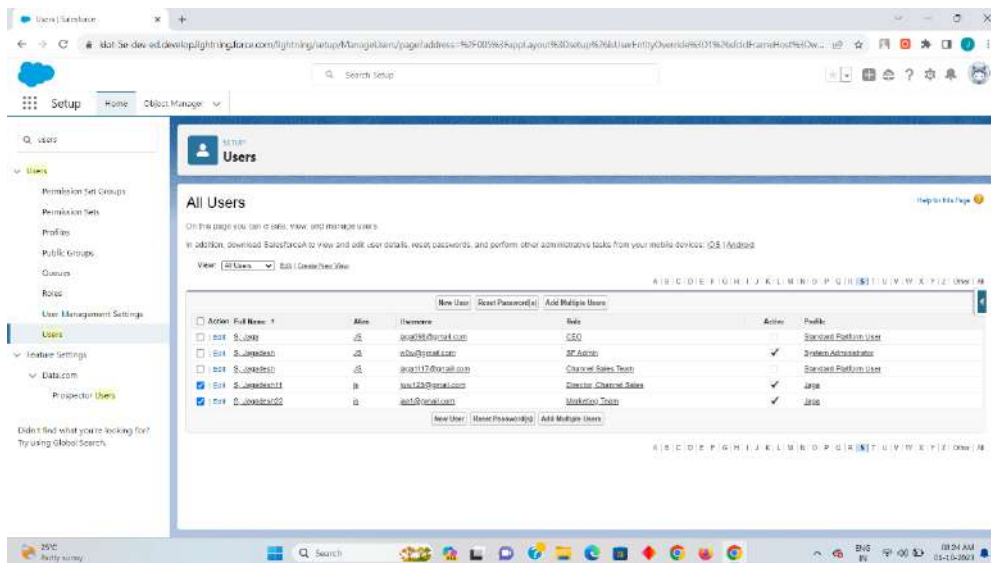
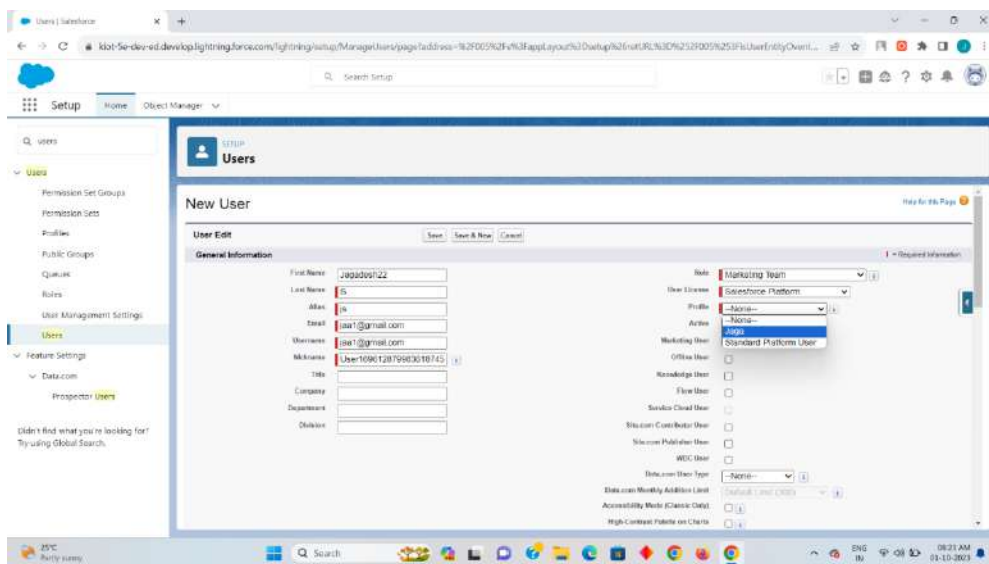
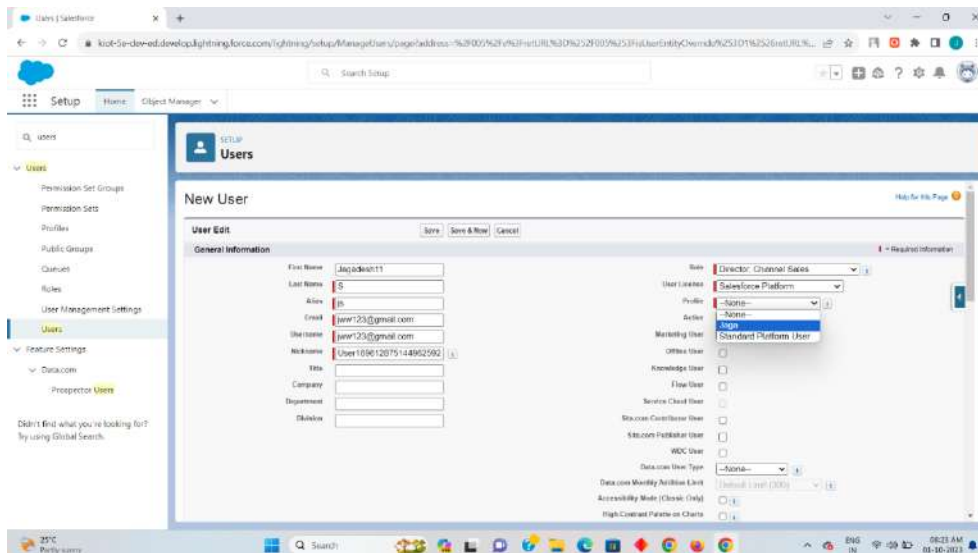
with the profile as Jaga which we have created on the step 2. once the one user has been created click on the save&new so that you can create the second user and there the user name can be created with alternate name but with the same user profile and once the two user are create click on save.



The screenshot displays the Salesforce Setup interface for managing users. The left sidebar shows the navigation menu with 'Users' selected. The main content area, titled 'All Users', provides instructions on creating, viewing, and managing users. Below the instructions, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A table lists the existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table includes users like Chatter Expert, Gaby Jace, S. Jaga, S. Japadesi, User Integration, and User Security. At the bottom, there are more buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00d50000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Gaby Jace	jgaby	jgaby_gaby.jgaby@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/> Edit	S. Jaga	sj	sjaga006@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S. Japadesi	sj	sjaga@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	S. Japadesi	sj	sjaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d50000000000000000000000000000@corp.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	us@00d50000000000000000000000000000@corp.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User







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:

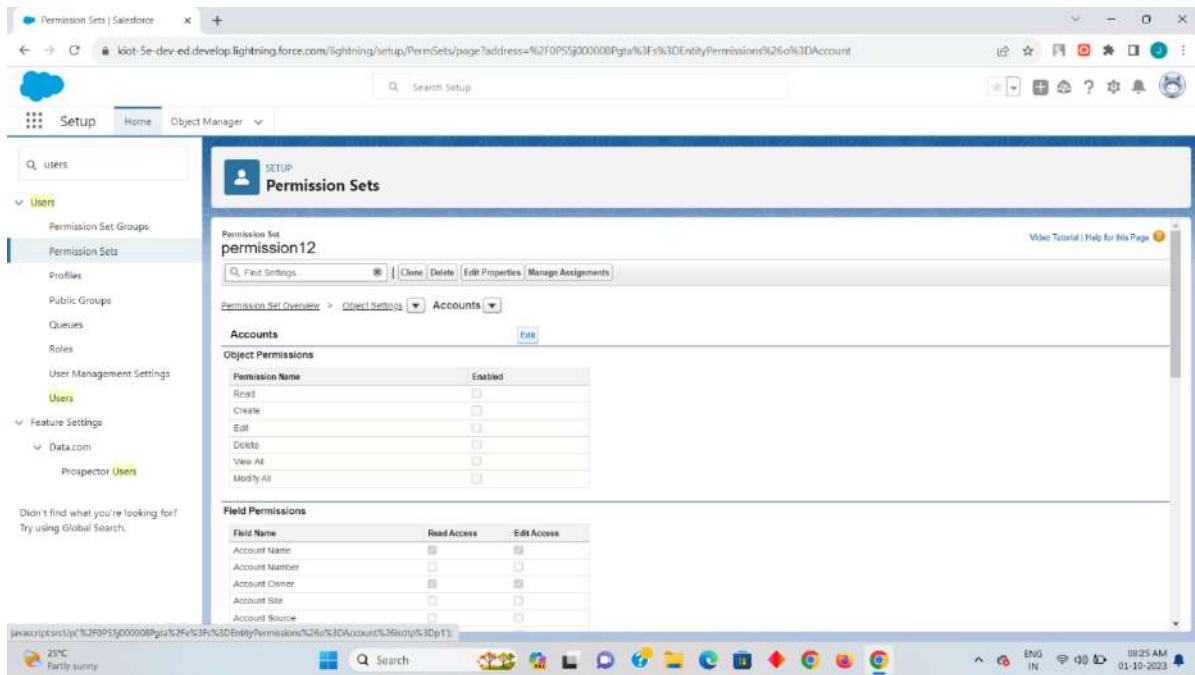
Now the two user as been created with the profile so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can created as

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



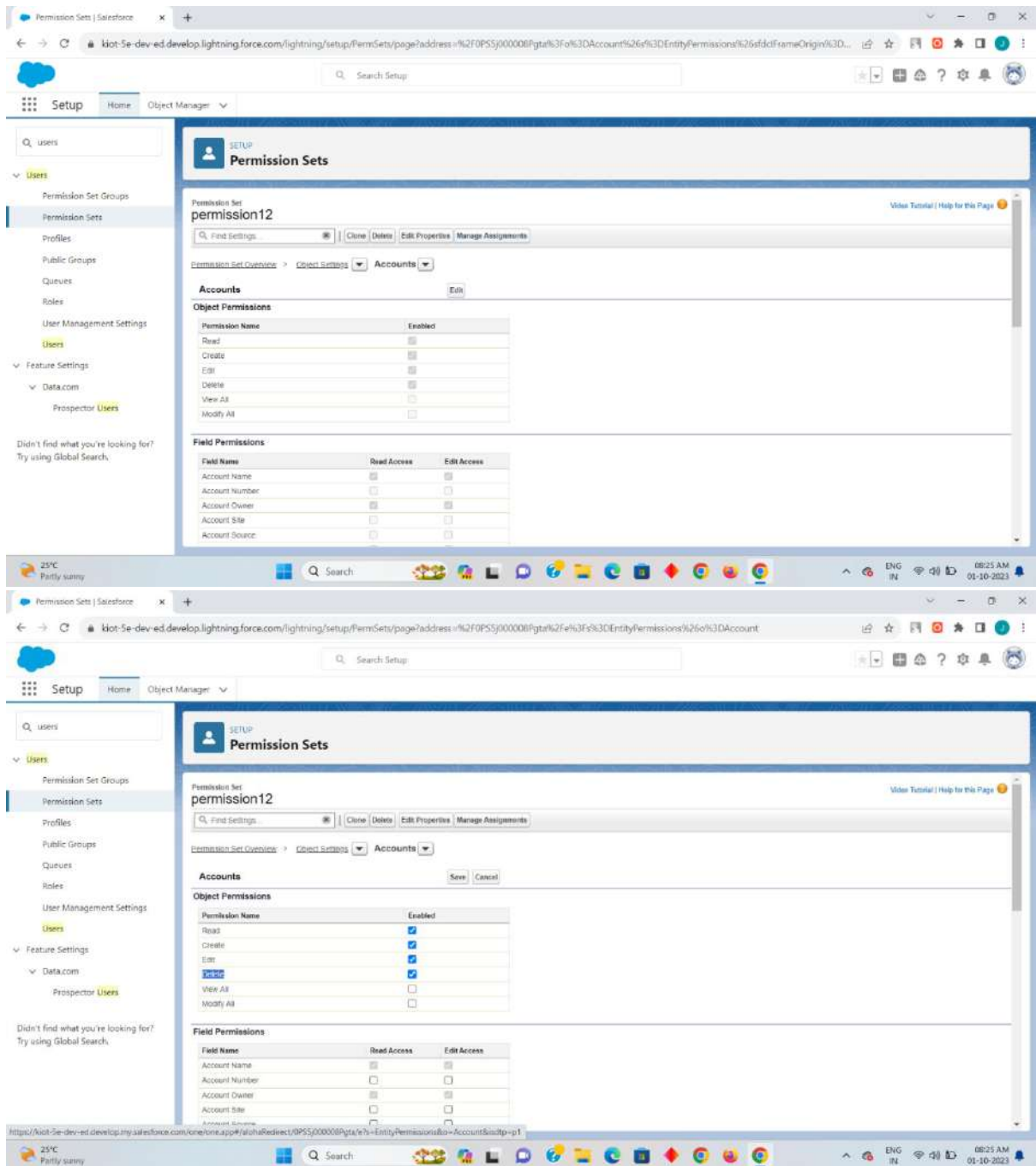
The screenshot shows the Salesforce Lightning Setup interface. The left sidebar contains a navigation menu with the following items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. The 'Users' item is currently selected. The main content area is titled 'Permission Sets' and shows the configuration for a specific permission set named 'permission12'. Below the title, there are tabs for 'Permission Set Overview' and 'Object Settings', with 'Object Settings' being the active tab. A table titled 'Object Settings' displays the following data:

Object Name	Object Permissions	Total Fields	Tab Settings
Account	No Access	3	—
Account	No Access	44	—
Account	No Access	—	—
Account	No Access	—	—
Account	No Access	—	—
Account	No Access	27	—
Account	No Access	14	—
Account	No Access	—	—
Account	No Access	—	—
Account	No Access	3	—
Account	No Access	17	—
Account	No Access	4	—
Account	No Access	—	—
Account	No Access	—	—
Account	No Access	—	—
Account	No Access	5	—
Account	No Access	30	—
Account	No Access	18	—



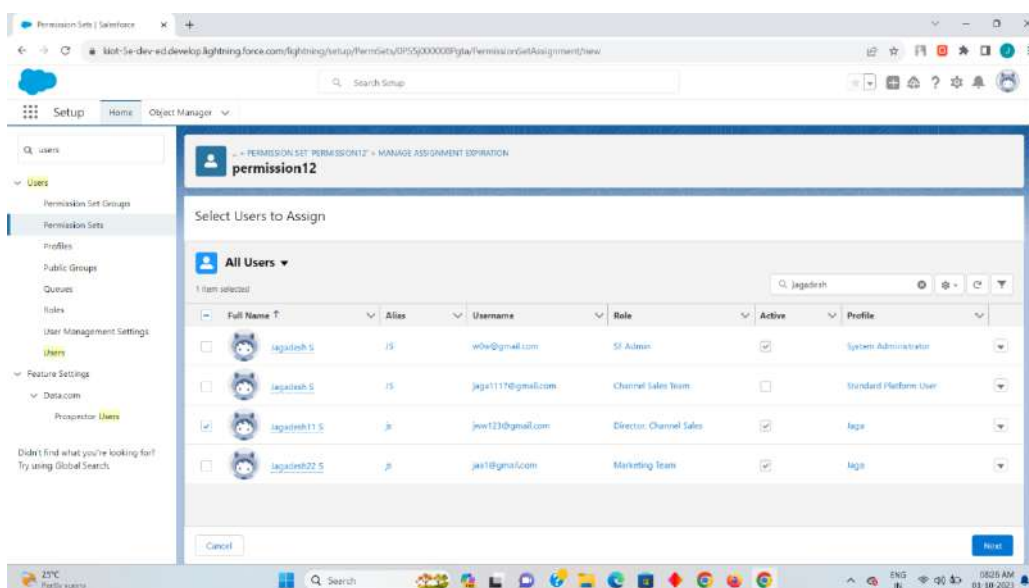
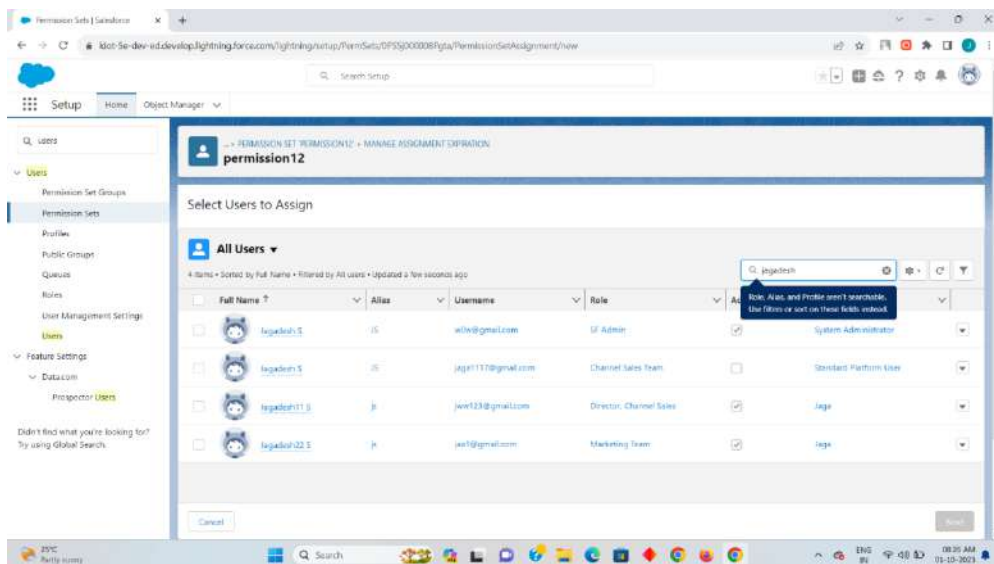
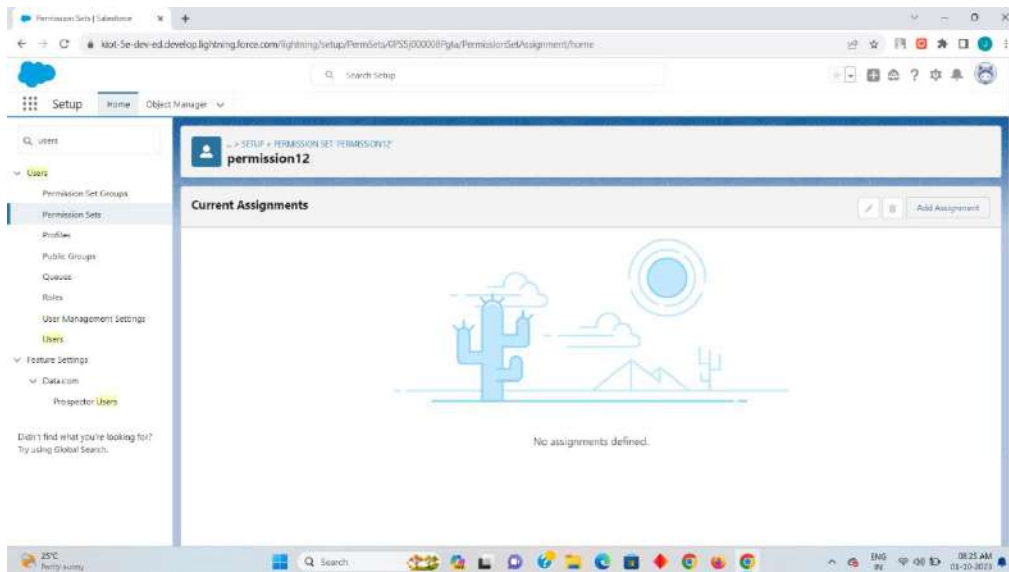
## Step 7:

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.

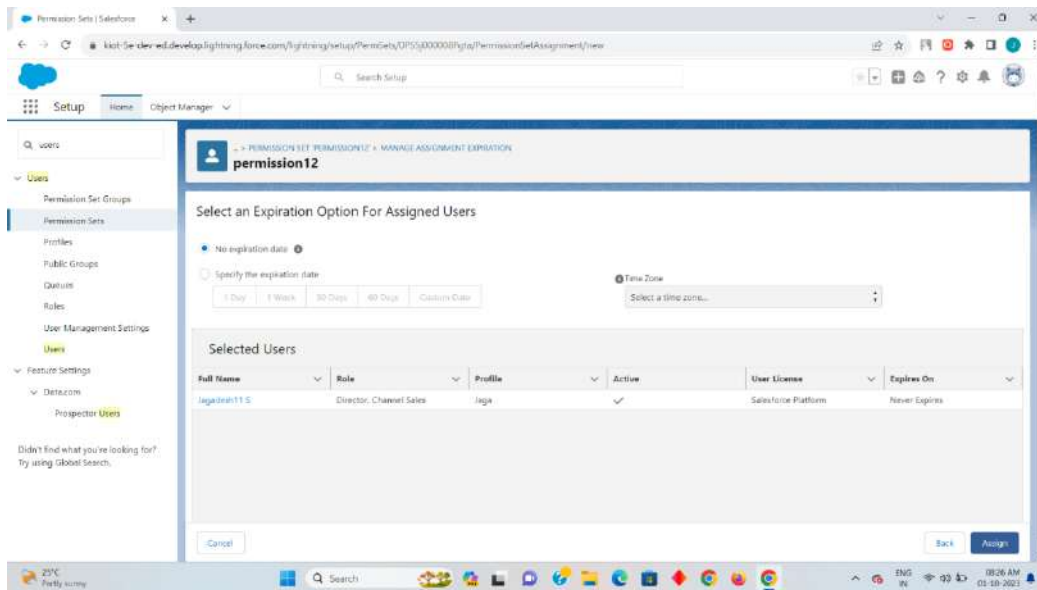


## Step 8

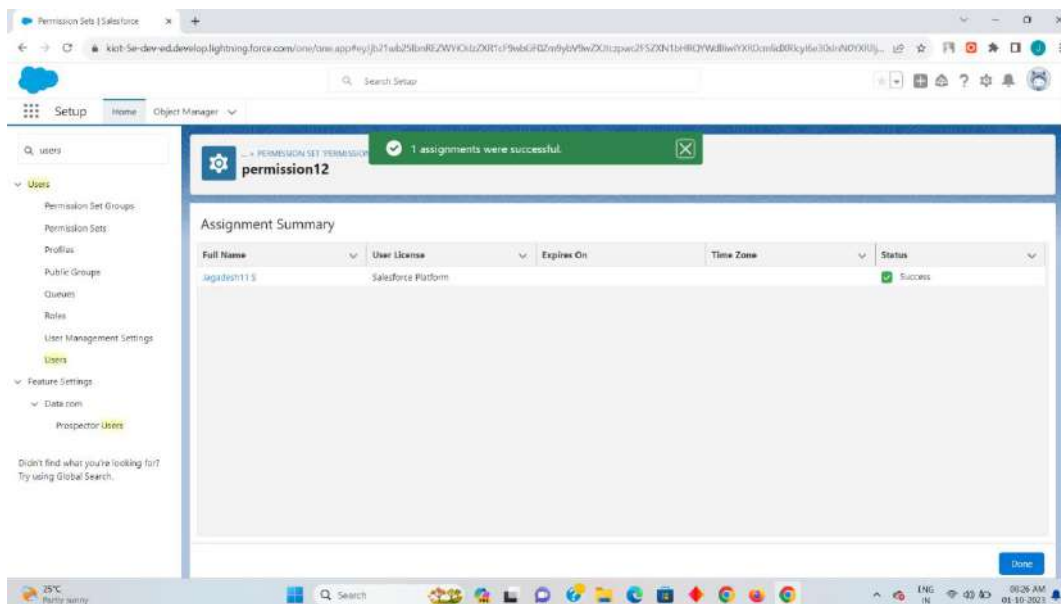
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



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



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

Solution:

Step 1: Create a Custom Object

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

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



<div> <div> </div> <div> <div>SETUP &gt; OBJECT MANAGER</div> <div>Survey Result</div> </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>	<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> </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
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## Step 3: Create an Email Alert

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

5. For **Object** select **Survey Result**.
6. For the **Email Template** chooses **Lightning Email Template Thank You Email – Survey**.
7. For **Recipient Type** select **Email Field:**
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 area 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 'Available Recipients' as 'User: Integration User', 'User: Rakesh Gupta', and 'User: Security User', and 'Selected Recipients' as 'Email Field: Email'. The 'From Email Address' section shows 'Current User's email address' and a checkbox to 'Make this address the default From email address for this object's email alerts.' The form has 'Save', 'Save & New', and 'Cancel' buttons at the bottom.

**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 🔍

Protected Component ☐

Recipient Type Search: User ! 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	← <input type="text" value="Comment"/> ×
Email__c	← <input type="text" value="Email &gt; Value"/> ×
Name__c	← <input type="text" value="{!Name.firstName} {!Name.lastName}"/> ×
Rating__c	← <input type="text" value="Rating"/> ×

☐ 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.

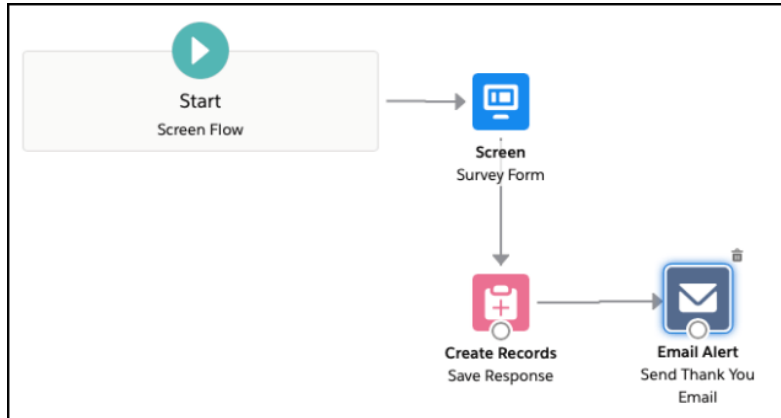
1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.

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

5. Click **Done**.

The screenshot shows the configuration interface for an email alert. At the top, it says "Edit 'Survey - Thank You Email' email alert". Below this is a note: "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." There are two input fields: "Label" with the value "Send Thank You Email" and "API Name" with the value "Send\_Thank\_You\_Email". Below these is a "Description" field. Further down is a "Set Input Values" section with a field for "Record ID" containing the value "{!Save\_Response}". At the bottom right 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

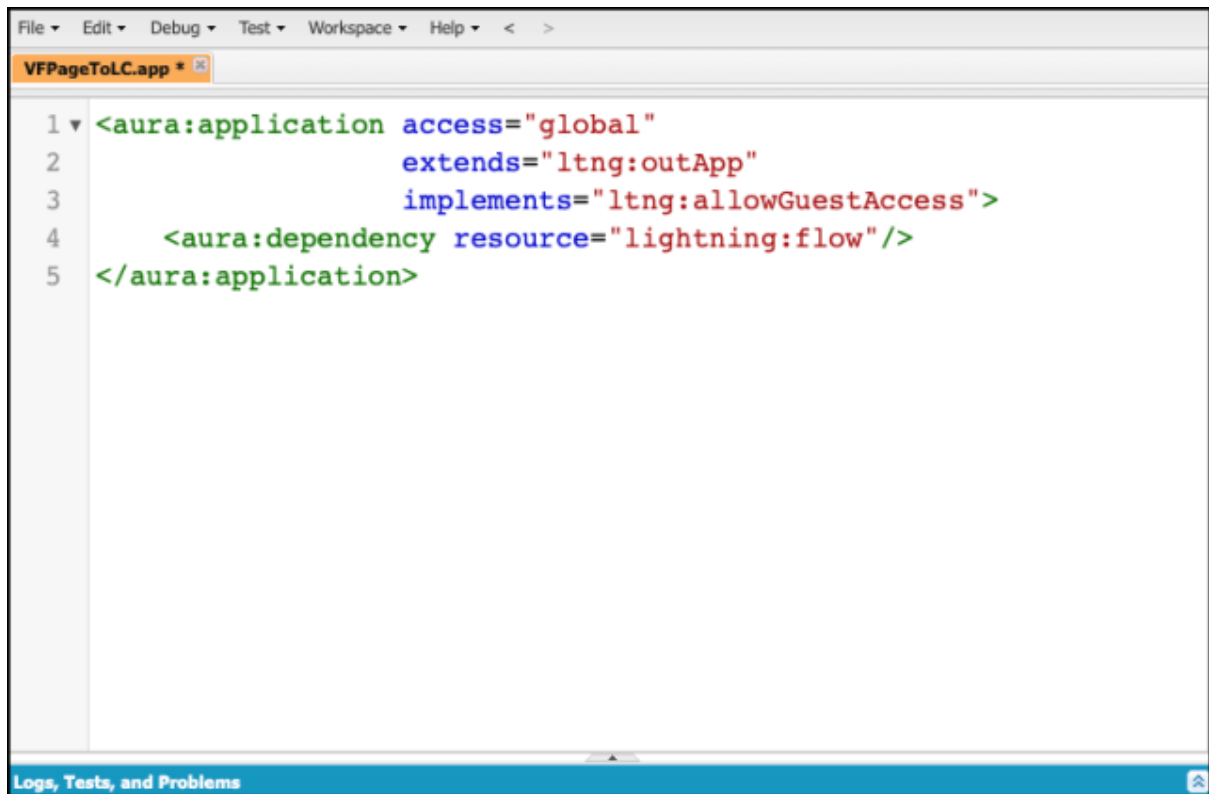
Save



## 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>
```

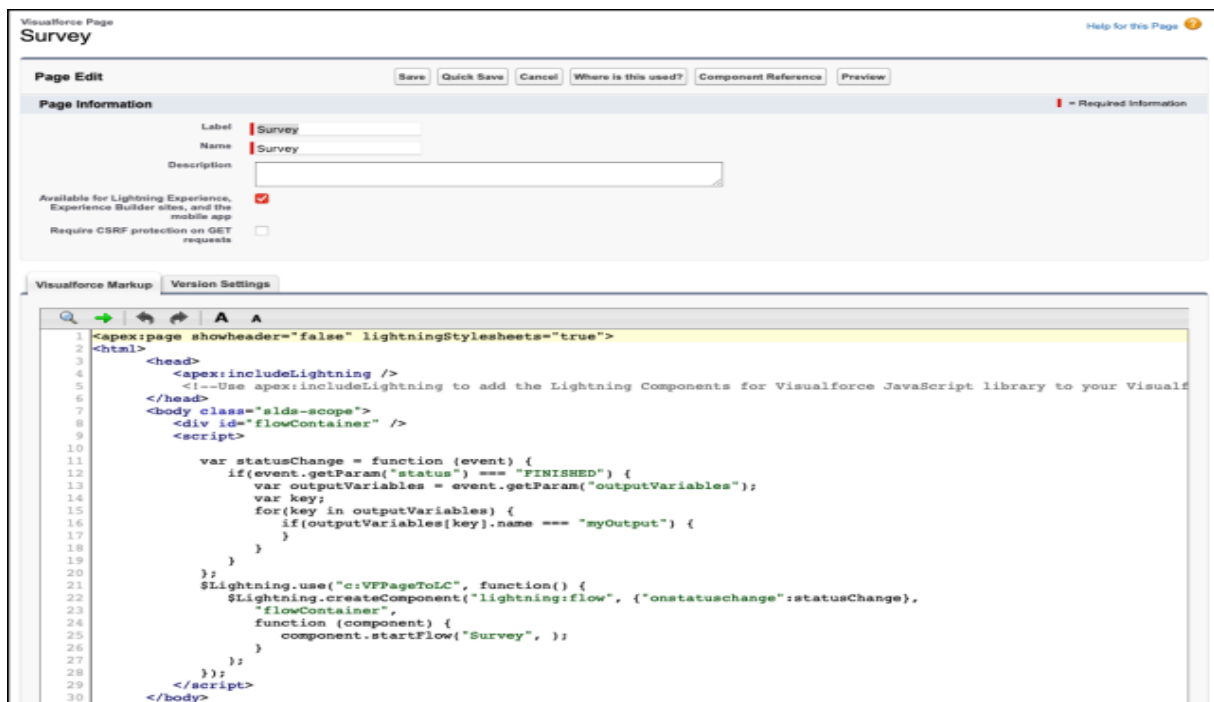
## Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

Sinhal


\*Email

\*Rating

5 

\*Comment

Awesome Blog



Next

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

A screenshot of an email interface. The header shows the subject "Thank You For Completing Our Survey!" with an "Inbox" label. The sender is "Survey Site Guest User" with a profile picture and email address "via bj9amq6fe7r1b-cdzwwmaa.gs0.bnc.salesforce.com". The time is "8:09 PM (1 minute ago)". The email body contains a large grey redaction box, followed by the text "Hi Alok Sinhal," and two paragraphs of text. The first paragraph says: "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." The second paragraph says: "Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions." The email ends with "Thanks, Automation Champion". At the bottom are "Reply" and "Forward" buttons.