

**SALESFORCE DEVELOPER (NAAN MUDHALVAN)**

**ASSIGNMENT 1**

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**DOMAIN : SALESFORCE DEVELOPER**

**BRANCH : B.TECH IT – IV YEAR**

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

Let's say you have two custom objects, "Parent\_Object\_c" and "Child\_Object\_c," and you want to establish a Master-Detail Relationship from Child\_Object\_c to Parent\_Object\_c as well as a Roll-Up Summary Field on Parent\_Object\_c to track the records that are related to Child\_Object\_c.

**Create Custom Objects:** Create the "Parent\_Object\_c" custom object if you haven't already.

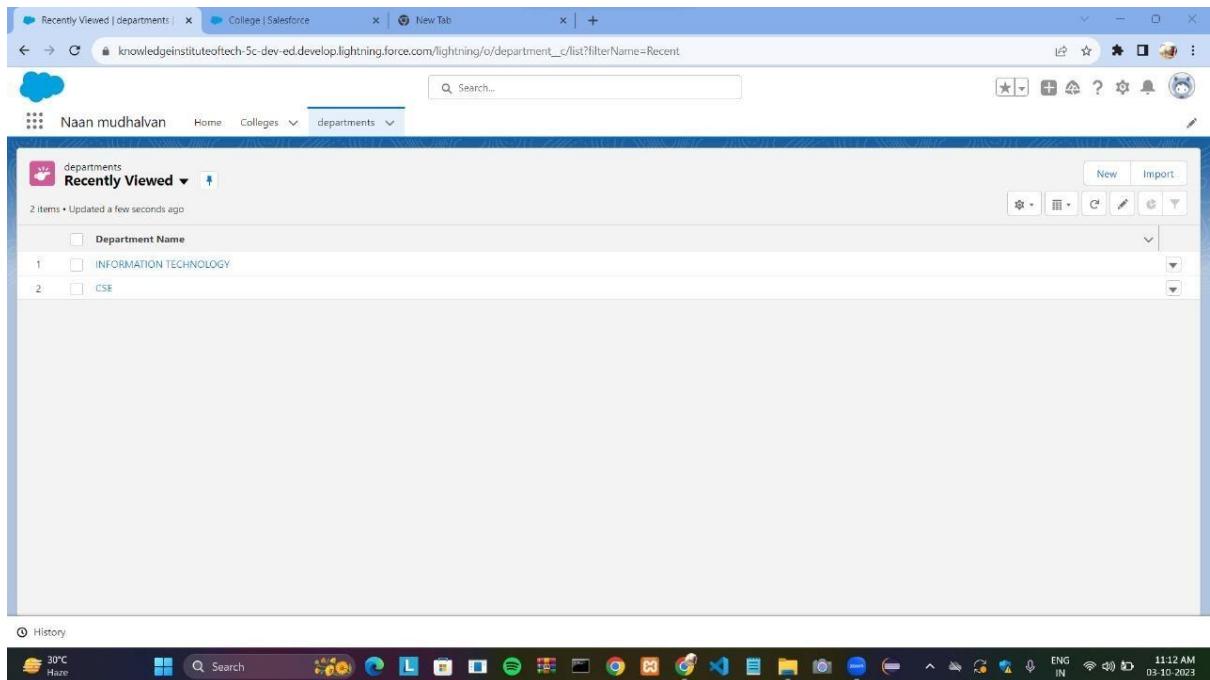
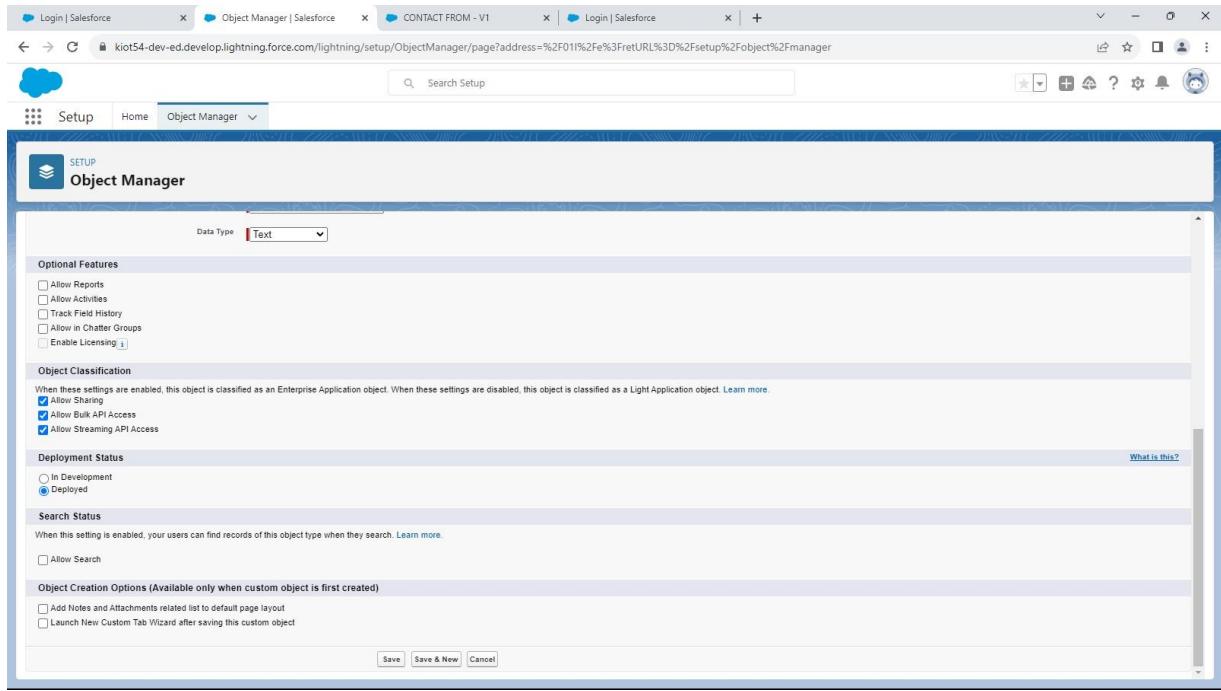
The screenshot shows the Salesforce Setup interface with the title 'New Custom Object'. The page is titled 'New Custom Object' and contains several sections for defining the custom object:

- Custom Object Definition Edit**: Includes 'Save', 'Save & New', and 'Cancel' buttons.
- Custom Object 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**: A large text area for describing the object.
  - Context-Sensitive Help Setting**:
    - Open the standard Salesforce.com Help & Training window
    - Open a window using a Visualforce page
  - Content Name**: A dropdown menu set to 'None'.
- 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**: Text
- Optional Features**:
  - Allow Reports
  - Allow Activities
  - Track Field History
  - Allow in Chatter Groups
  - Enable Licensing
- Object Classification**:
  - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
  - Allow Sharing
  - Allow Bulk API Access
  - Allow Streaming API Access
- Deployment Status**:
  - 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

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

The top screenshot shows a browser window with the URL [knowledgeinstituteoftech-5c-dev-ed.lightning.force.com/lightning/o/College\\_\\_c/list?filterName=Recent](https://knowledgeinstituteoftech-5c-dev-ed.lightning.force.com/lightning/o/College__c/list?filterName=Recent). The page displays a 'Recently Viewed' list under the 'Colleges' tab, showing two items: 'KSR' and 'KIOT'. The bottom screenshot shows the Salesforce Object Manager interface for creating a new custom object. The 'Custom Object Definition Edit' screen is displayed, with the object name set to 'haven'. Other fields include 'Label' (naveen), 'Plural Label' (naveen), and 'Description' (empty). Buttons for 'Save', 'Save & New', and 'Cancel' are visible at the top right.

**Create the "Child\_Object\_c" custom object if you haven't already.**

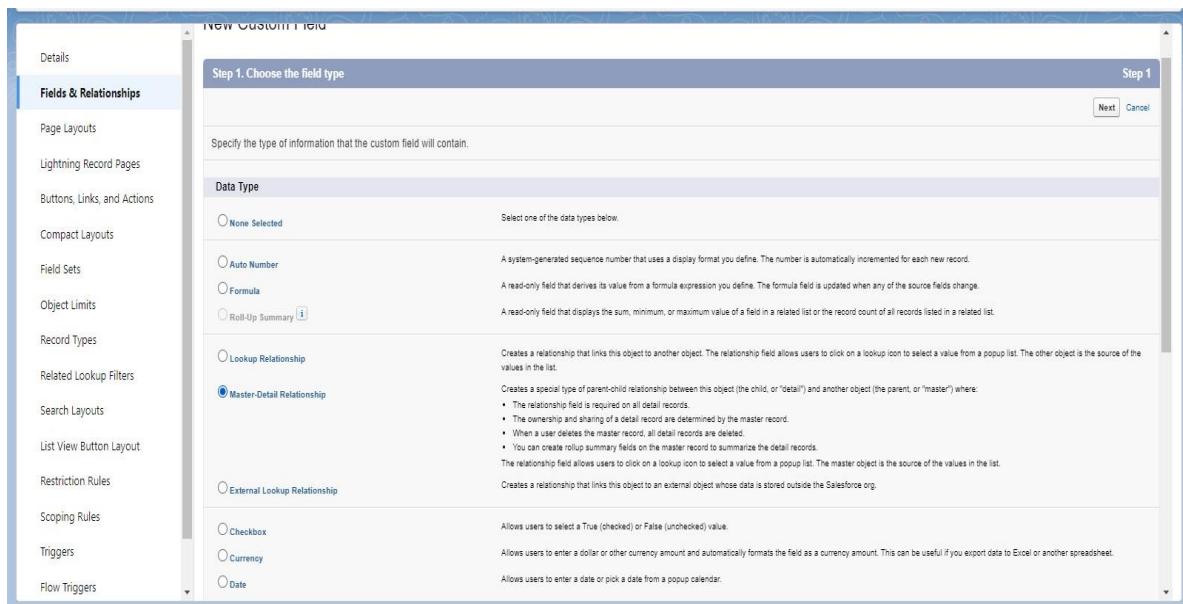
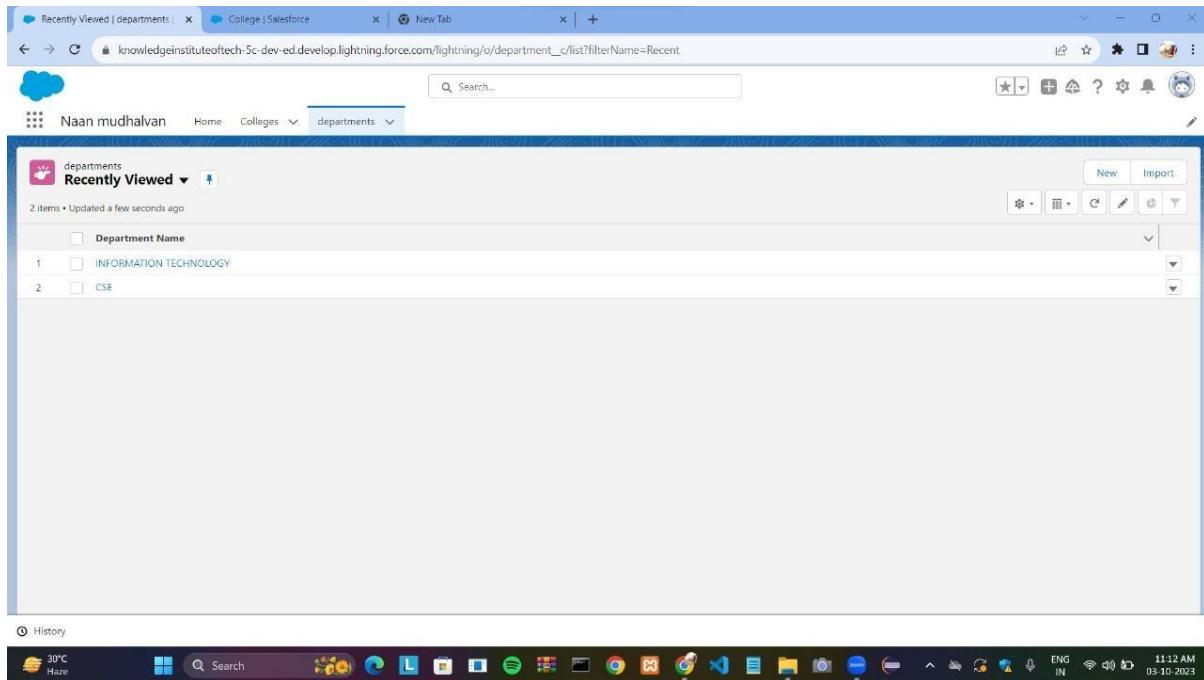


**Establish a master-detail relationship: - Click "Setup" in the top-right corner by selecting the gear icon.**

- 1) Select "Object Manager" from the list of "Objects and Fields."
- 2) To access its options, click "Child\_Object\_c".
- 3) Select "New Relationship" under "Fields & Relationships" in the menu.
- 4) Select the "Master-Detail Relationship" relationship type.
- 5) "Parent\_Object\_c" should be chosen as the parent object.

6) Give the connection a name that has meaning, such as "Parent Relationship."

7) Click "Next" to complete the process after defining additional settings such as whether they are required or not.



TAINER NAME  
New Relationship

Step 4 of 6

Field Label: TAINER NAME  
 Data Type: Master-Detail  
 Field Name: TAINER\_NAME  
 Description:

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

TAINER NAME  
New Relationship

Step 5 of 6

Field Label: TAINER NAME  
 Data Type: Master-Detail  
 Field Name: TAINER\_NAME  
 Description:

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field: Page Layout Name

<input checked="" type="checkbox"/> TAINER NAME Layout
--

Previous Next Cancel

TAINER NAME  
New Relationship

Help for this Page 

**Fields & Relationships**

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers

**Step 6. Add custom related lists** Step 6 of 6

Field Label: TAINER NAME  
Data Type: Master-Detail  
Field Name: TAINER\_NAME  
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label: **TAINER NAMES**

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List Page Layout Name:  tainer Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

CSE | department | College | Salesforce | New Tab | +

Naan mudhalvan Home Colleges departments

department CSE

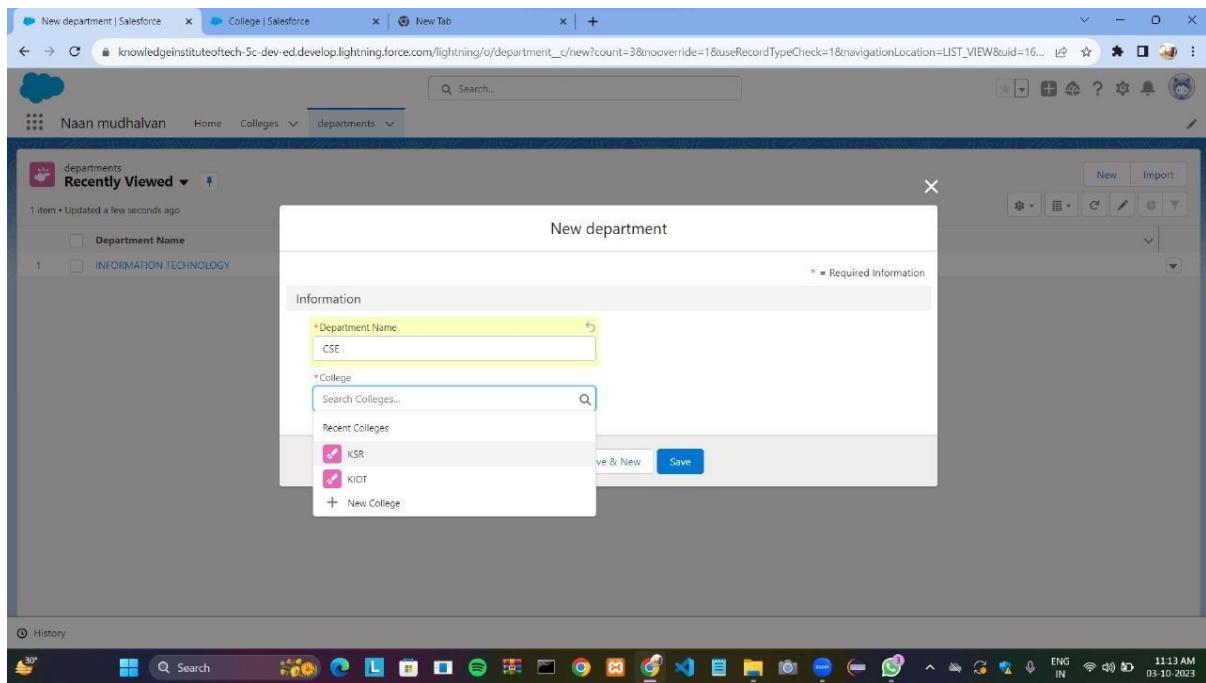
Related Details

Department Name: CSE  
College: ICSE

Created By: Naveenkumar S 08/10/2023, 11:13 am Last Modified By: Naveen kumar S 08/10/2023, 11:13 am

New Contact Edit New Opportunity





### Create a field for a roll-up summary:

- 1) Return to the "Parent\_Object\_c" settings after building the Master-Detail Relationship.
- 2) Click on "New" under "Fields & Relationships" and choose "Roll-Up Summary."
- 3) Pick the "Child Relationship Name" (made in step 2); an example might be "Child\_Object\_r"
- 4) Select the aggregation operation, in this example "Count".
- 5) Create a descriptive field label, such as "Total Child Records".
- 6) Define other field characteristics if desired.
- 7) To construct the Roll-Up Summary Field, click "Next" and then "Save".

college

## New Custom Field

Help for this Page 

**Step 1. Choose the field type**

Step 1

Next Cancel

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

**Data Type**

Select one of the data types below.

<input type="radio"/> None Selected	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Auto Number	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.
<input checked="" type="radio"/> 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.
<input type="radio"/> 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.
<input type="radio"/> 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: <ul style="list-style-type: none"> <li>• The relationship field is required on all detail records</li> <li>• The ownership and sharing of a detail record are determined by the master record.</li> <li>• When a user deletes the master record, all detail records are deleted.</li> <li>• You can create rollup summary fields on the master record to summarize the detail records.</li> </ul> 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.
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
<input type="radio"/> True/False	Allows users to select a True (checked) or False (unchecked) value.

Rename Tabs and Labels

**Tabs**

Help for this Page 

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

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		<a href="#">New</a> <a href="#">What Is This?</a>	Description
Action	Label	Tab Style	
Edit   Del	Book1	 Box	
Edit   Del	Research Proposal	 Square	
Edit   Del	student	 Box	

Web Tabs		<a href="#">New</a> <a href="#">What Is This?</a>
No Web Tabs have been defined		

Visualforce Tabs		<a href="#">New</a> <a href="#">What Is This?</a>
No Visualforce Tabs have been defined		

Lightning Component Tabs		<a href="#">New</a> <a href="#">What Is This?</a>
No Lightning component tabs have been defined		

Lightning Page Tabs		<a href="#">New</a> <a href="#">What Is This?</a>
No Lightning Page Tabs have been defined		

college

## New Custom Field

Help for this Page 

Details
Step 5 of 5

**Step 5. Add to page layouts**

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

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

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

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/> college Layout	

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

Previous Save & New Save Cancel

college

## New Custom Field

Help for this Page 

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

Previous Next Cancel

Details

## college New Custom Field

Help for this Page 

**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

**Step 3. Define the summary calculation** Step 3 of 5

**Select Object to Summarize**

Master Object college  
Summarized Object **CDEpartments** 

**Select Roll-Up Type**

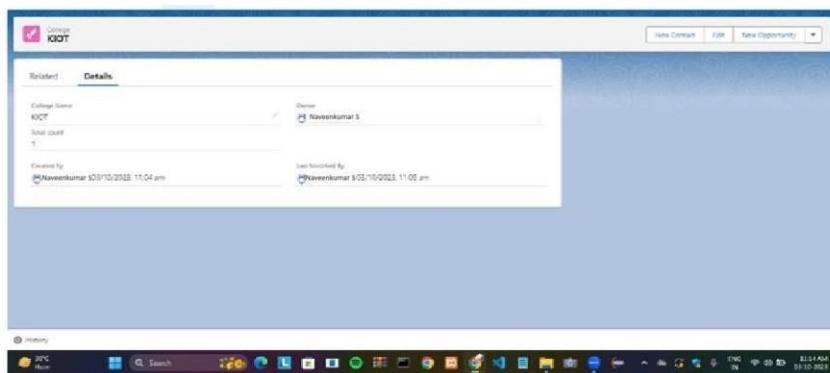
COUNT  
 SUM  
 MIN  
 MAX

Field to Aggregate **None**

**Filter Criteria**

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

**Previous** **Next** **Cancel**



**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.**

To create a user in Salesforce, you'll typically need administrator or delegated permissions. Here are the general steps to create a new user:

## **Log in to Salesforce:**

- Log in to your Salesforce instance with an account that has administrative privileges.

### **Access the User Setup:**

- Click on your profile picture or the user icon in the top-right corner.
- Select "Setup" from the dropdown menu.

### **Navigate to User Management:**

- In the left-hand sidebar, under "Administer," click on "Users."

### **Create a New User:**

- Click on the "New User" button or link to begin creating a new user.

### **Fill in User Details:**

- Fill in the user's information, such as First Name, Last Name, Email, Username (typically an email address), and Alias (used in reports).
- Assign a Role to the user to determine their access within the role hierarchy.
- Choose a License Type (e.g., Salesforce, Chatter Free, or a specific app license).
- Assign a Profile to the user to determine their permissions and settings.

### **Save the User:**

- Click the "Save" button to create the user.

### **Assign a Password:**

- After saving the user, you'll be prompted to assign a temporary password.
- Communicate this temporary password to the user, who will need to change it upon their first login.

### **Verify User Creation:**

- Log out of your administrator account and log in as the newly created user to ensure they have the expected access and permissions.

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](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00d5j00000cirbea3.s8kemujhcp@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	G_S_VIGNAYA	VG_S	vignaya@naamudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Saiappan_User_Vignaya	usall	vignaya08@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Work.com Only User
<input type="checkbox"/> Edit	User_Integration	integ	integration.00d5j00000cirbea3.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity.00d5j00000cirbea3.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	Vignaya_jsy	ovion	sakthivignaya08@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	Vignaya_Sakthi	sign	vignaya08@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Work.com Only User
						Standard User

There are four ways you can manage record-level access. They are presented in ascending order of access. The most stringent degree of data protection is achieved using the organization-wide settings, and as needed, access is then granted to specific users using the various record-level security measures.

The default level of access that users have to one another's records is defined by organization-wide defaults.

Role hierarchies make guarantee that bosses have access the same information as their subordinates. A user or group of users may require a certain amount of data access, which is represented by each role in the hierarchy.

Sharing rules allow specific user groups access to documents they don't own or ordinarily can't see by automatically deviating from the organization's default settings.

Owners of records can offer read-only and edit access manually.

The screenshot shows the Salesforce All Accounts page. At the top, there are tabs for Service, Home, Chatter, Accounts (which is selected), Contacts, Cases, Reports, Dashboards, Trainers, departments, TAINER NAMES, Books, and Books. Below the tabs is a search bar and a toolbar with icons for New, Import, and Printable View. The main area displays a table with 14 rows of account data. The columns are: Account Name, Account Site, Billing State/Province, Phone, Type, and Account Owner Alias. The data includes various company names like Burlington Textiles Corp of America, Dickenson plc, Edge Communications, Express Logistics and Transport, GenePoint, Grand Hotels & Resorts Ltd, HARISH S, Pyramid Construction Inc., Sample Account for Entitlements, sForce, United Oil & Gas Corp., United Oil & Gas, Singapore, United Oil & Gas, UK, and University of Arizona, along with their respective details such as state/province, phone numbers, and account owner aliases.

The screenshot shows the Salesforce Sharing Settings page under the Setup tab. The left sidebar has sections for Security, Guest User Sharing Rule Access Report, and Sharing Settings (which is selected). The main area is titled "Sharing Settings" and contains a sub-section "Sharing Settings". It says "This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to Background Jobs to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation." Below this is a "Manage sharing settings for" dropdown set to "All Objects" and a "Disable External Sharing Mode" button. A table titled "Default Sharing Settings" shows "Organization-Wide Defaults" for various objects like Lead, Account & Contract, Contact, Order, Asset, Opportunity, Case, Campaign, Campaign Member, User, Activity, Calendar, Price Book, and Product. The table columns are Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. Most objects have "Public Read/Write/Transfer" as the default internal access, while some like User and Product have "Public Read Only". External access is mostly "Private" except for Case which is "Public Full Access". Hierarchies are controlled by Parent for most objects.

Role hierarchies ensure managers have access to the same records as their subordinates. Each role in the hierarchy represents a level of data access that a user or group of users needs.

**Permission Sets:**

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

**Object-Level Security:**

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

**Record-Level Security:**

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

**Ownership:**

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

**Organization-Wide Defaults:**

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

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

Screenshot of the Salesforce Permission Sets page:

**Permission Sets**

This page lists various permission sets, each with a description and license information. The columns are Action, Permission Set Label, Description, and License.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	ACCESS30_ACTIVITY	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	CRM User	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Commerce Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Admin	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Experience Profile Manager	Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. S...	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Allow access to commerce merchandising features.	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper	Limited access to Order Management features for Self Service	Lightning Order Management User

Screenshot of the Salesforce Create Permission Set page:

**Permission Sets**

The page shows the creation of a new permission set named "salesmanager". It includes fields for Label, API Name, Session Activation Required, and a note about selecting user types.

**Enter permission set information**

- Label: salesmanager
- API Name: salesmanager
- Description: (empty)
- 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:

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

**Permission Set Overview:**

- Description: salesmanager
- License: None
- Session Activation Required: Unchecked
- Last Modified By: GOPALS\_ 01/10/2023, 7:29 pm
- API Name: salesmanager
- Namespace Prefix: None
- Created By: GOPALS\_ 01/10/2023, 7:29 pm

**Apps:**

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

Screenshot of the Salesforce Setup interface showing the Object Settings section for the 'salesmanager' permission set.

**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	--
API Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invitees	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	16	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

Screenshot of the Salesforce Setup interface showing the Permission Sets page for a permission set named "salesmanager".

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

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

The main content area displays the "Permission Sets" page for "salesmanager".

**Tab Settings:** Bank

**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 checked="" type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>

URL: https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5j000008Phok%3Fs%3DentityPermissions%26o%3D...

Screenshot of the Salesforce Setup interface showing the Permission Sets page for a permission set named "salesmanager".

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- Permission Set Groups
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- Queues
- Roles
- User Management Settings
- Users**

The main content area displays the "Permission Sets" page for "salesmanager".

**Tab Settings:** Save | Cancel

**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 checked="" type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 46.0 | Reset Password | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OPS5j000008Phok/PermissionSetAssignment/home

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

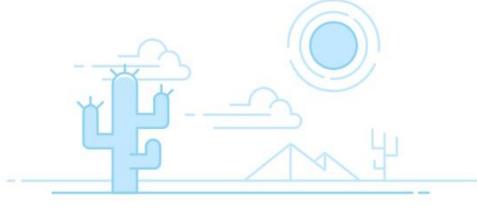
Actions & Recommendations

App Menu

salesmanager

... > SETUP > PERMISSION SET 'SALESMANAGER'

### Current Assignments



No assignments defined.

Add Assignment

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 46.0 | Reset Password | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OPS5j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

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App Menu

### Select Users to Assign

All Users

1 item selected

Full Name	Username	Role	Profile
Amelia Ellington	aelli	Force.com - App Subscription User	
Chatter Expert	chatty.00d5j00000bcskkeab.lo0bfwmpqjke@chatter.salesforce	Chatter Free User	
Diya Adanna	dadan	UMS User	
GOPAL S	kiot520@gmail.com	System Administrator	
Integration User	integ	Analytics Cloud Integration User	
madhu b	mb	salesmanage	
Security User	sec	Analytics Cloud Security User	
sowmiya bala	sbala	Manager	

Cancel Next

The screenshot shows the Salesforce 'Permission Sets' page under the 'Users' section. On the left, there's a sidebar with options like 'Custom Code' and 'Custom Permissions'. The main area is titled 'Current Assignments' and contains a table with columns: Full Name, Active, Role, Profile, User License, and Expires On. A single row is visible for 'DEEPIKA S V', which is active, assigned the 'System Administrator' role, has the 'Profile' set to 'System Administrator', the 'User License' is 'Salesforce', and it expires on 03-10-2023. There are buttons for 'Edit', 'Delete', and 'Add Assignment' at the top right of the table.

**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.**

#### **1.Create a New Permission Set:**

- Go to Setup > Permission Sets and click "New Permission Set."

#### **2. Define Object Permissions:**

- In the Permission Set, go to "Object Settings" and find the Account object.
- Edit the permissions for the Account object in the Permission Set.
- Grant the "Delete" permission to the user you want to allow to delete records. Leave it unchecked for the other user.

#### **3.Assign Permission Sets:**

- Assign the newly created Permission Set with the "Delete" permission to the user you want to grant this access to.

#### **4.Remove Delete Access from Profile:**

- Go to the profile assigned to both users.
- In the profile settings, remove the "Delete" permission for the Account object.

#### **Profile Creation:**

Creating profiles and add to the existing user to grant the permission set.

Profile standard profile -no act

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

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

Profile Detail			
Name	standard profile -no act		
User License	Salesforce Platform		
Description			
Created By	HARISH S 30/09/2023, 8:21 pm		
Modified By	HARISH S 02/10/2023, 12:36 pm		
<b>Page Layouts</b>			
Standard Object Layouts			
Global	<a href="#">Global Layout</a> [View Assignment]	Operating Hours	<a href="#">Operating Hours Layout</a> [View Assignment]
Email Application	Not Assigned [View Assignment]	Order	<a href="#">Order Layout</a> [View Assignment]
Home Page Layout	<a href="#">Home Page Default</a> [View Assignment]	Order Product	<a href="#">Order Product Layout</a> [View Assignment]
Account	<a href="#">Account Layout</a> [View Assignment]	Payment	<a href="#">Payment Layout</a> [View Assignment]
Alternative Payment Method	<a href="#">Alternative Payment Method Layout</a> [View Assignment]	Payment Authorization	<a href="#">Payment Authorization Layout</a> [View Assignment]
Appointment Invitation	<a href="#">Appointment Invitation Layout</a> [View Assignment]	Payment Authorization Adjustment	<a href="#">Payment Authorization Adjustment Layout</a> [View Assignment]
Asset	<a href="#">Asset Layout</a> [View Assignment]	Payment Gateway	<a href="#">Payment Gateway Layout</a> [View Assignment]
Asset Relationship	<a href="#">Asset Relationship Layout</a> [View Assignment]	Payment Gateway Log	<a href="#">Payment Gateway Log Layout</a> [View Assignment]
Assigned Resource	<a href="#">Assigned Resource Layout</a>	Payment Group	<a href="#">Payment Group Layout</a>

Profile Demo std user profile

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

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

Profile Detail			
Name	Demo std user profile		
User License	Customer Community		
Description			
Created By	HARISH S 02/10/2023, 12:22 pm		
Modified By	HARISH S 02/10/2023, 12:22 pm		
<b>Page Layouts</b>			
Standard Object Layouts			
Global	<a href="#">Global Layout</a> [View Assignment]	Order	<a href="#">Order Layout</a> [View Assignment]
Email Application	Not Assigned [View Assignment]	Order Product	<a href="#">Order Product Layout</a> [View Assignment]
Home Page Layout	<a href="#">Home Page Default</a> [View Assignment]	Payment	<a href="#">Payment Layout</a> [View Assignment]
Account	<a href="#">Account Layout</a> [View Assignment]	Payment Authorization	<a href="#">Payment Authorization Layout</a> [View Assignment]
Alternative Payment Method	<a href="#">Alternative Payment Method Layout</a> [View Assignment]	Payment Authorization Adjustment	<a href="#">Payment Authorization Adjustment Layout</a> [View Assignment]
Appointment Invitation	<a href="#">Appointment Invitation Layout</a> [View Assignment]	Payment Gateway	<a href="#">Payment Gateway Layout</a> [View Assignment]
Asset	<a href="#">Asset Layout</a> [View Assignment]	Payment Gateway Log	<a href="#">Payment Gateway Log Layout</a> [View Assignment]
Asset Relationship	<a href="#">Asset Relationship Layout</a> [View Assignment]	WhatsApp	<a href="#">WhatsApp Layout</a> [View Assignment]
Assigned Resource	<a href="#">Assigned Resource Layout</a>	Insert Group	<a href="#">Insert Group Layout</a> [View Assignment]

## Permission Sets:

**Experience Profile Manager**

**Permission Set Overview**

Description	API Name	Experience_Profile_Manager
License	Namespace Prefix	
Session Activation Required	Created By	HARISH_S, 22/08/2023, 10:42 am
Last Modified By		

**Apps**

- Assigned Apps**: Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu.
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability.
- Apex 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.
- Named Credential Access**: Permissions to authenticate against named credentials.

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

The screenshot shows the Salesforce Setup interface under the Profiles section. It lists custom object permissions for Books, departments, and harishs, and session settings like password expiration and login attempts.

Object	Basic Access	Create	Edit	Delete	View All	Modify All
Books	<input checked="" type="checkbox"/>					
departments	<input checked="" type="checkbox"/>					
harishs	<input checked="" type="checkbox"/>					

**Session Settings**

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

**Password Policies**

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

The screenshot shows the Salesforce Setup interface under the Permission Sets section. It displays account settings and object permissions for the Experience Profile Manager.

**Accounts**

Tab Settings: Available

**Object Permissions**

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

**Field Permissions**

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

By following these steps, you have effectively granted delete access to one user while keeping it restricted for the other user. The user with the Permission Set will be able to delete Account

records, while the user without the Permission Set will only have Create, Read, and Edit access but won't have the ability to delete records.

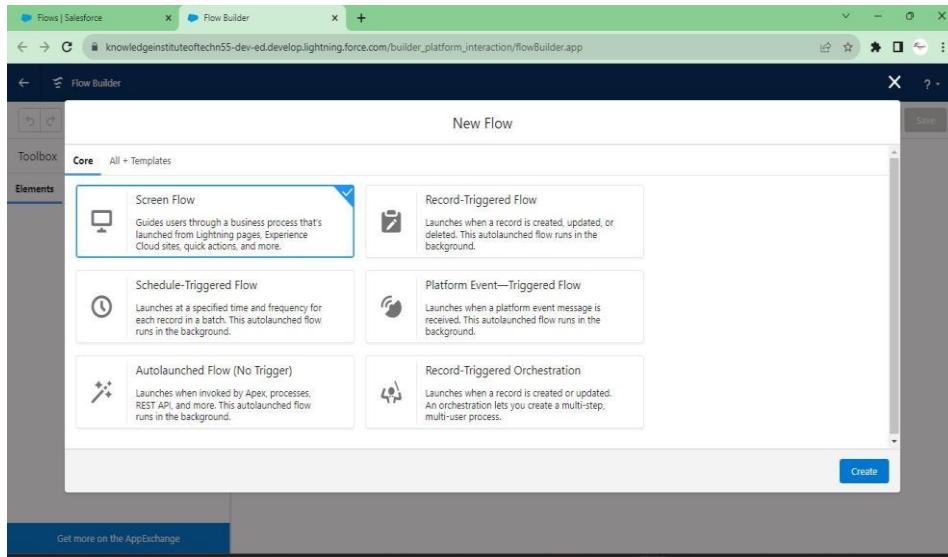
## 4.Create a screen flow for a basic survey to fill in the details for any form.

### Step 1: Access Salesforce Setup

1. Open your Salesforce account and log in.
2. Select the gear icon or your profile photo in the top-right corner.
3. From the dropdown menu, choose "Setup".

### Step 2: Create a flow

1. In the Quick Find box of the Setup menu, type "Flows" and choose "Flows."

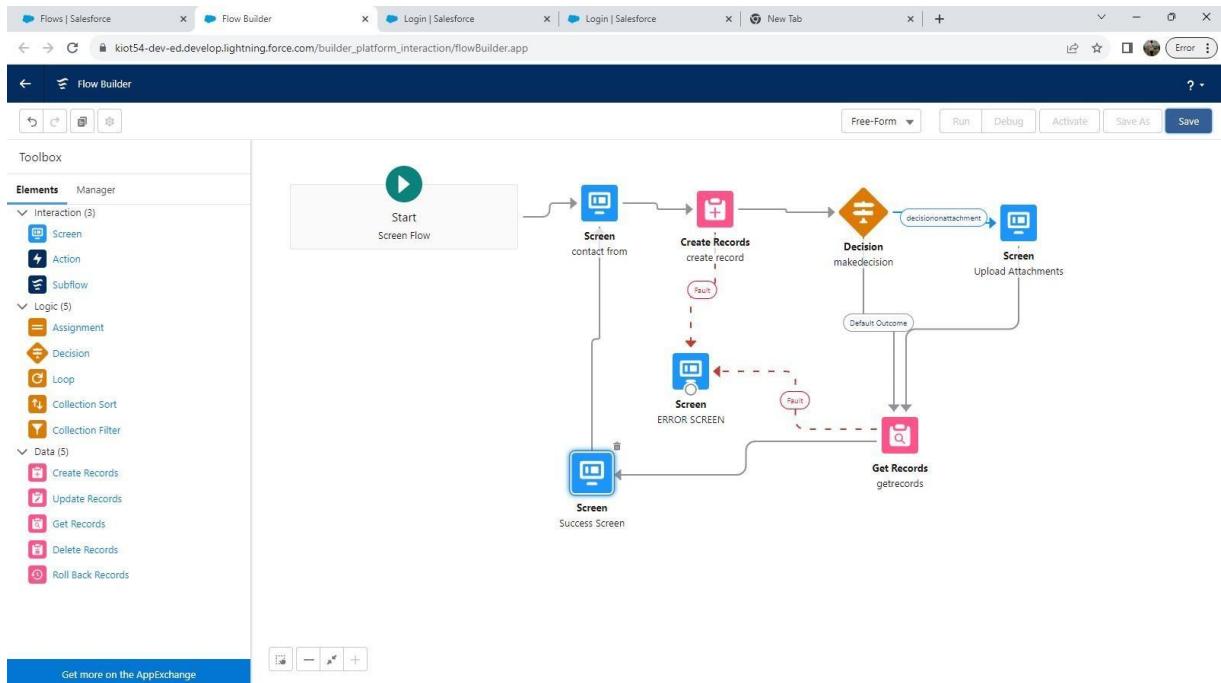


### Step 3 : Add Screen Elements

1. Move a "Screen" component into position on the canvas. This will be where your flow will begin.
2. To configure an element of the screen, click on it.
3. Include language and instructions on this screen to explain the survey and what data are needed.

4. To allow visitors to enter survey information, drag and drop the necessary input components (such as text fields, radio buttons, and checkboxes) onto the page. These components can be found in the left-hand palette.

5. If required, add the proper labels, explanatory text, and validation rules to each input element.



#### Step 4: construct Variables

1. You must construct variables to hold the survey data if you wish to collect and save it. Create variables for each field on the screen by selecting the "Manager" tab in the palette. Verify that the data types of the related fields and the variable types are the same.

The screenshot shows a browser window with multiple tabs open, all related to a Salesforce environment. The active tab displays a 'CONTACT FROM' form with fields for first name (HARISH), last name (S), email (harish0733962@gmail.com), and phone (6379523138). A checkbox for 'Attachments?' is checked. To the right of the form is a 'Debug Details' sidebar. The sidebar contains several sections: 'Transaction Committed' (with a note about records ready to be created), 'SCREEN: Success Screen' (displaying 'HUARRY! YOUR RECORD SUCCESSFULLY CREATED'), 'Selected Navigation Button: PREVIOUS', another 'Transaction Committed' section, 'SCREEN: Upload Attachments' (describing a lightning component), and another 'Transaction Committed' section.

The screenshot shows a browser window with multiple tabs open, all related to a Salesforce environment. The active tab displays a success message: 'HUARRY! YOUR RECORD SUCCESSFULLY CREATED'. Below the message are 'Previous' and 'Next' navigation buttons.

The screenshot shows the Salesforce Setup interface with the 'Flows' category selected in the left sidebar. The main area displays a table titled 'Flow Definitions All Flows'. The table has columns for 'Flow Label', 'Process Type', 'Active', 'Template', 'Package State', 'Packag...', 'Last Modified Date', and 'Last Modified By'. There are 35 items listed, sorted by flow label. The first few rows include 'Basic Approval Request' (Flow Orchestration for CMS), 'Book Appointment from invitation' (Salesforce Scheduler Flow), 'Cancel Item Flow' (Screen Flow), 'Change Case Owner to Incident Owner' (Screen Flow), and 'Close Change Request & Related Issues' (Screen Flow). The interface includes standard Salesforce navigation elements like a search bar, a toolbar with icons, and a status bar at the bottom.

This screenshot shows the same Salesforce Setup interface as the previous one, but with a different set of flows listed in the table. The table is titled 'Flow Definitions All Flows' and contains 35 items, updated 4 minutes ago. The flows listed include 'CMS: Notify Content Author' (Screen Flow), 'CMS: Review Content' (Screen Flow), 'CMS: Submit Content for Review' (Screen Flow), 'CMS: Withdraw Review Request' (Screen Flow), 'CONTACT FROM' (Screen Flow), 'Create a Case' (Screen Flow), 'Create Order Summary Flow' (Autolaunched Flow), 'Create Process Exception Flow' (Autolaunched Flow), 'Create Waitlist' (Salesforce Scheduler Flow), 'Discount Flow' (Screen Flow), 'Even Exchange Flow' (Screen Flow), 'Find Contact Associated with Messaging Session' (Individual-Object Linking Flow), 'Generate Appointment Invitation' (Salesforce Scheduler Flow), 'Inbound Cancel Appointment' (Salesforce Scheduler Flow), 'Inbound Modify Appointment' (Salesforce Scheduler Flow), and 'Inbound New Appointment' (Salesforce Scheduler Flow). The interface remains consistent with the first screenshot.

## Step 7: Create a Finish Screen

Add a final screen where you can thank the user for completing the survey and provide any necessary information or instructions.

### **Step 8: Connect the Screens**

Connect the screens and elements in the desired order by dragging connectors between them.

### **Step 9: Set the Flow Properties**

Click on the canvas and go to the Properties tab on the right to set the flow's name, description, and other settings.

### **Step 10: Activate the Flow**

After designing the flow, click "Save" and then "Activate" to make it available for users.