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Salesforce Developer(Course)
Assignment no 1

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

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

Solution:

Step 1: Create Custom Objects

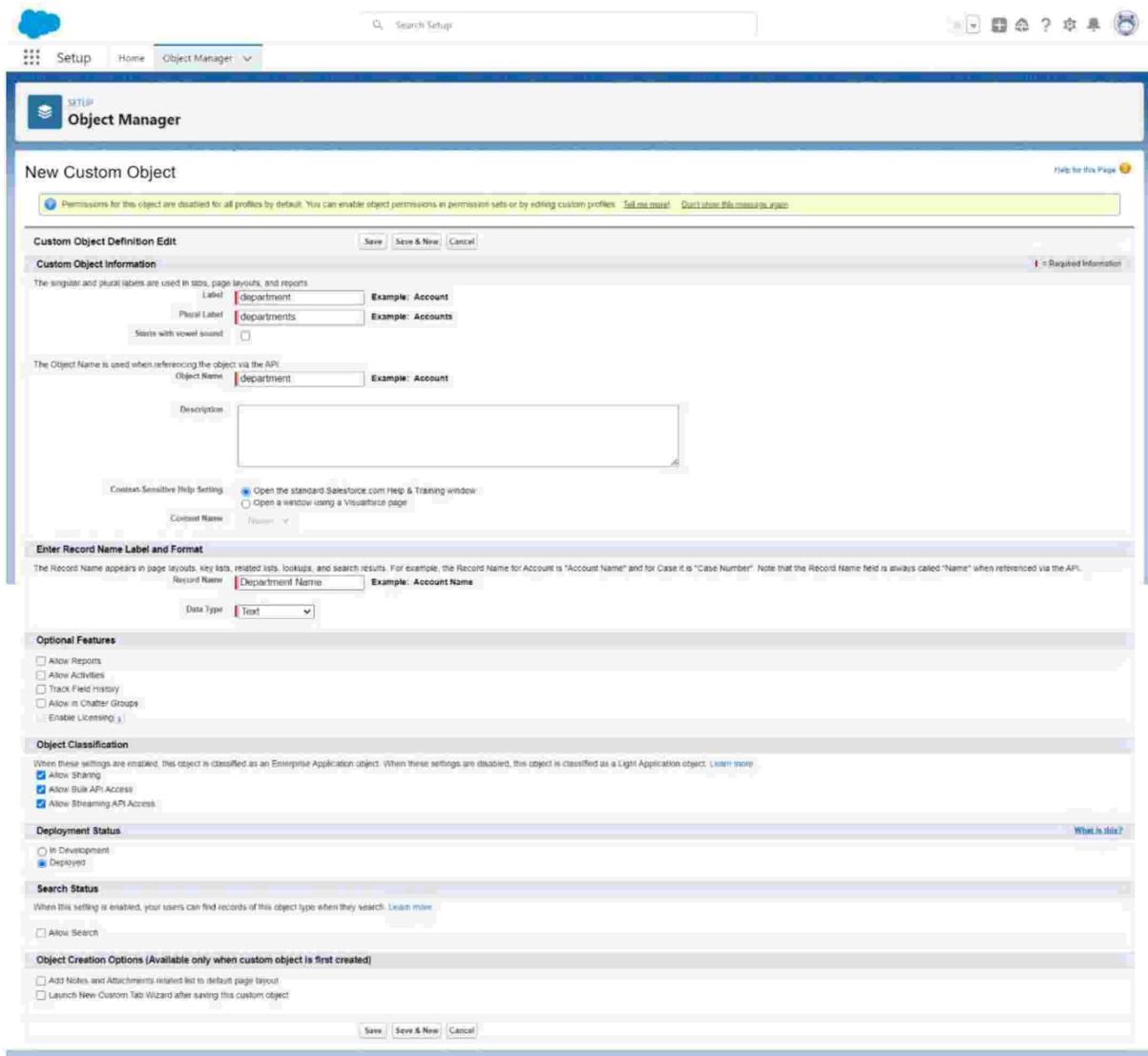
Assuming you have two custom objects, let's call them "College_C" and "C Department_C". If you haven't already created these objects, you can do so by going to Setup > Object Manager > Create > Custom Object.

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

- Header:** SETUP, Search Setup.
- Breadcrumbs:** Setup > Home > Object Manager > New Custom Object.
- Title:** New Custom Object
- Message Bar:** Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)
- Custom Object Definition Edit:**
 - Custom Object Information:** Label: college, Plural Label: colleges, Example: Account, Starts with vowel sound:
 - Object Name:** Object Name: college, Example: Account
 - Description:** A large text area for description.
 - Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (selected), Open a window using a Visualforce page.
 - Contact Name:** Person
- Enter Record Name Label and Format:** Record Name: college 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 (radio button)
- 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

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

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



Step 2: Create a Master-Detail Relationship

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

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

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

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

Details

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

Description API Name CDDepartment__c Custom Singular Label CDepartment Plural Label CDDepartments

Enable Reports Track Activities Track Field History Deployment Status Deployed Help Settings Standard salesforce.com Help Window

Edit Delete

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

Details

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

New Relationship Step 3 of 6

Field Label college Field Name college Description Help Text

Child Relationship Name CDDepartments Sharing Setting Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
 Read Only. Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 Read/Write. Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting Auto add to custom report type Child records can be reparented to other parent records after they are created. Add this field to existing custom report types that contain this entity.

Lookup Filter

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

Screenshot 1: New Relationship

- Left Panel:** Shows the "Fields & Relationships" section selected under "Object Manager". Other options include Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.
- Right Panel:** Titled "Step 2. Choose the related object". It shows a dropdown menu set to "college". A progress bar at the top right indicates "Step 2 of 6". Buttons for Previous, Next, and Cancel are at the bottom right.

Screenshot 2: New Custom Field

- Left Panel:** Shows the "Fields & Relationships" section selected under "Object Manager". Other options are identical to the first screenshot.
- Right Panel:** Titled "Step 1. Choose the field type". It asks "Specify the type of information that the custom field will contain". Under "Data Type", "Master-Detail Relationship" is selected. A detailed description explains that it creates a special type of parent-child relationship between the current object and another object. It includes bullet points about required master records, ownership, and summary fields. Buttons for Next and Cancel are at the top right.

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 Object Manager interface for the 'CDepartment' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Fields & Relationships' and shows a table with the following data:

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected under 'User Interface'. The page title is 'SETUP Tabs'. It includes a search bar and various navigation icons. The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section has a 'New' button and a 'What Is This?' link. Under 'Custom Object Tabs', there is a table showing three tabs: 'Books' (selected), 'Research Proposal', and 'Shelfset'. The 'Books' tab has a 'Tab Style' set to 'Box'.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' section selected. The page title is 'SETUP > OBJECT MANAGER college'. The left sidebar lists various object settings like Page Layouts, Buttons, and Actions. The main content area is titled 'New Custom Field' and is on 'Step 5: Add to page layouts'. It shows a field configuration for 'Total count' with Data Type 'Roll-Up Summary' and Field Name 'Total_count'. Below it, a list of page layouts is shown with checkboxes for 'Add Field' and 'Page Layout Name'. The 'college Layout' checkbox is checked. At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

Setup > Object Manager college

New Custom Field

Step 4 of 5: 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"/>
France.com - Ann Richardson User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Setup > Object Manager college

New Custom Field

Step 3 of 5: Define the summary calculation

Select Object to Summarize

Master Object:	college
Summarized Object:	CDepartments

Select Roll-Up Type

<input checked="" type="radio"/> COUNT	<input type="radio"/> SUM	<input type="radio"/> MIN	<input type="radio"/> MAX
--	---------------------------	---------------------------	---------------------------

Field to Aggregate:

Filter Criteria

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

New Custom Field

Step 2. Enter the details

Field Label: [Help](#)

Field Name: [Help](#)

Description:

Help Text:

Auto-add to custom report type Add this field to existing custom report types that contain this entity [Help](#)

Step 2 of 5

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

New Custom Field

Step 1. Choose the field type

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

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- 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 master record is required on all detail records.
 - The numbering and styling of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Step 1

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area displays the 'college' object details. On the left, a sidebar lists various configuration options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, among others. The central panel is titled 'Fields & Relationships' and contains a table with four items. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓

Step 4: Create a Lightning App

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

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main title is 'New Custom Object Tab'. Below it, a sub-header says 'Step 2. Add to Profiles.' and 'Step 2 of 3'. A note reads: '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 button options: 'Apply one tab visibility to all profiles [Default On]' (selected) and 'Apply a different tab visibility for each profile'. To the right, there is a table titled 'Tab Visibility' with two columns: 'Profile' (list of user profiles) and 'Tab Visibility' (dropdown menu for each profile). At the bottom right of the table are 'Previous', 'Next', and 'Cancel' buttons.

New Custom Object Tab

Step 1 of 3

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

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

Object	college
Tab Style	Joined

(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: [Empty Text Area]

Next **Cancel**

Step 2: 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

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

Append tab to users' existing personal customizations

Previous **Save** **Cancel**

New Custom Object Tab

Step 1 of 3

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

Description:

Next Cancel

Lightning Experience App Manager

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

App Name ↑	Developer Name	Description	Last Modified Date	App ...	Visibil...
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	✓

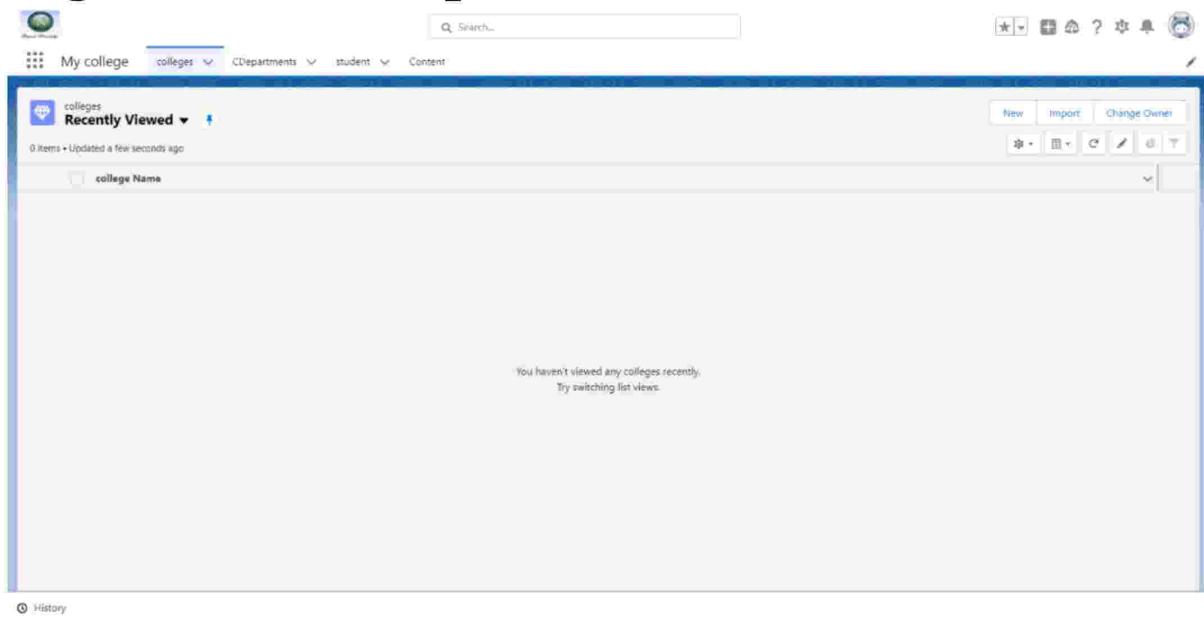
The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has sections for 'User Interface' and 'Tabs'. A search bar at the top right says 'Search Setup'. The main content area is titled 'Custom Tabs' and contains a brief introduction about creating custom tabs to extend Salesforce functionality. Below this is a table for 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. The table lists several tabs like 'B2B83', 'CDepartments', 'colleges', 'Research_Proposal', and 'students'. There are also sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a note indicating no items have been defined.

The screenshot shows the Salesforce Setup interface with the 'New Lightning App' configuration screen. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has sections for 'Salesforce', 'Data', 'Mobile', and 'Apps'. Under 'Apps', 'Lightning Apps' is selected. The main content area is titled 'New Lightning App' and 'App Details & Branding'. It asks for a name ('App Name: My college'), developer name ('Developer Name: My_college'), and a description ('Description: Enter a description...'). It also allows setting an 'Image' (a logo for 'Beyond Knowledge') and a 'Primary Color Hex Value' (#427AAC). A checkbox 'Use the app's image and color instead of the org's custom theme' is checked. The bottom of the screen shows a progress bar with 'Next' button.

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.



app-d-dev-ed.lightning.force.com/lightning/o/college_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=10961390...

My college colleges Recently Viewed

New college

Information

* = Required Information

College Name	kilot
Phone	9087116402
Email	kilot@ac.in
Location	
Latitude	90
Longitude	80

Owner: krishna s.

Cancel Save & New Save

History

My college colleges CDepartments student Content

CDepartments Recently Viewed

Item • Updated a few seconds ago

Department Name	
1	col

New Import

History

To open, pin another list view

New CDepartment

* = Required Information

Information
<p>*Department Name Information technology</p> <p>college kist</p> <p>email it@gmail.com</p> <p>phone 097577568</p> <p>bed name arul</p> <p>about</p>

Cancel Save & New Save

History

My college colleges CDDepts student Content

CDDepartment information technology

New Contact Edit New Opportunity

Related Details

Department Name: Information technology

college: kiot

email: it@gmail.com

phone: 097577568

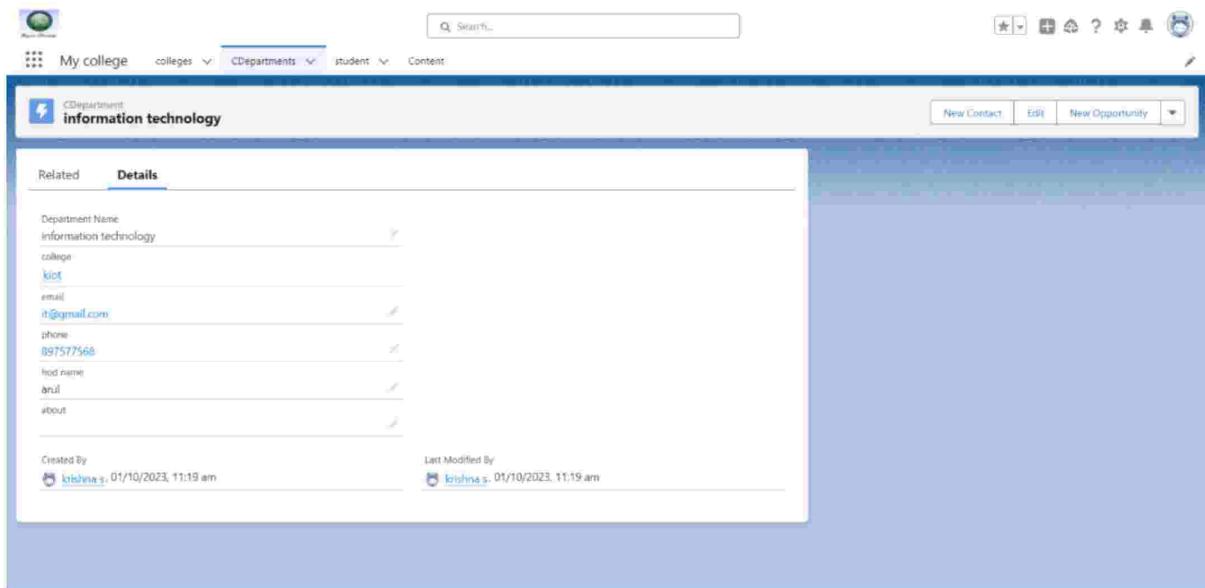
hod name: arul

about:

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

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

History



My college colleges CDDepts student Content

CDDepartment

New Contact Edit New Opportunity

Related Details

college Name: kiot

Total count: 1

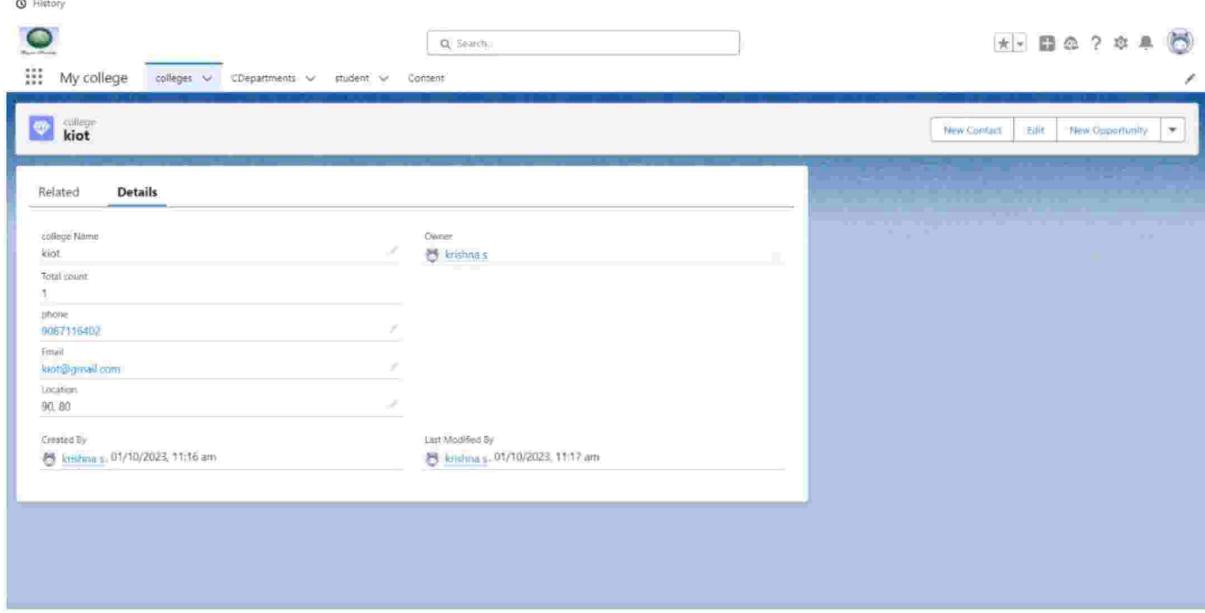
phone: 9067116402

Email: kiot@gmail.com

Location: 90, 80

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

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



My college colleges CDDepts student Content

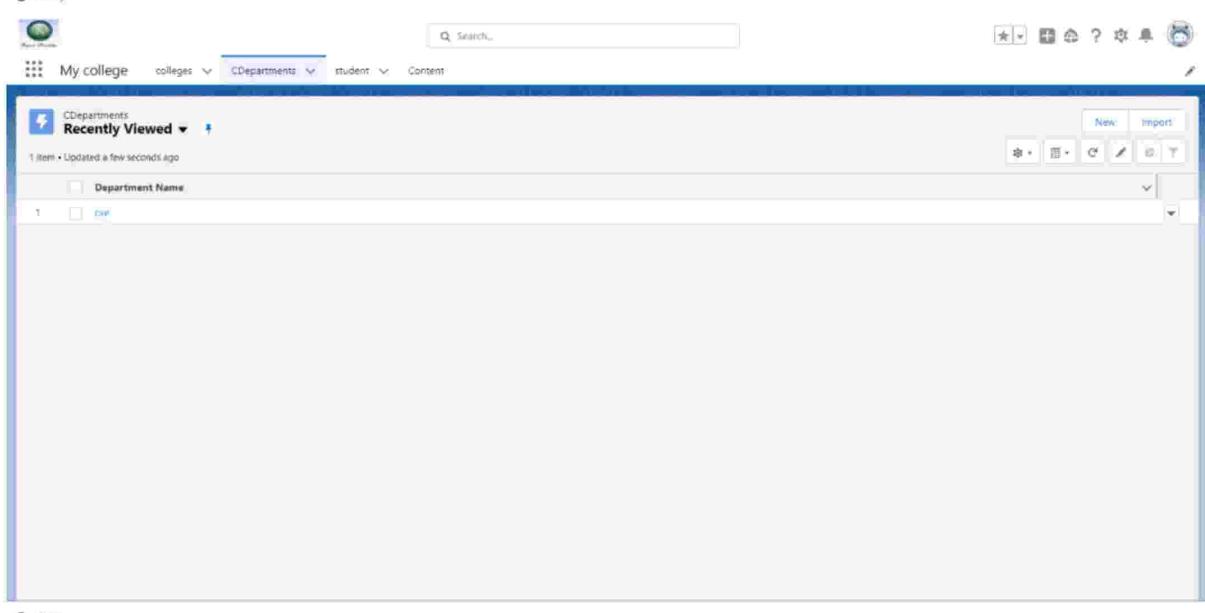
CDDepts Recently Viewed

1 item • Updated a few seconds ago

Department Name

1

New Import



History

My college colleges CDepartments student Content

Recently Viewed ▾

1 item • Updated a few seconds ago

college Name
kiot

New Import Change Owner

History

My college colleges CDepartments student Content

college kiot

Related Details

college Name	kiot	Owner	krishna.s
Total count:	2		
Phone:	9067116402		
Email:	kiot@gmail.com		
Location:	90, 80		
Created By:	krishna.s. 01/10/2023, 11:16 am	Last Modified By:	krishna.s. 01/10/2023, 11:19 am

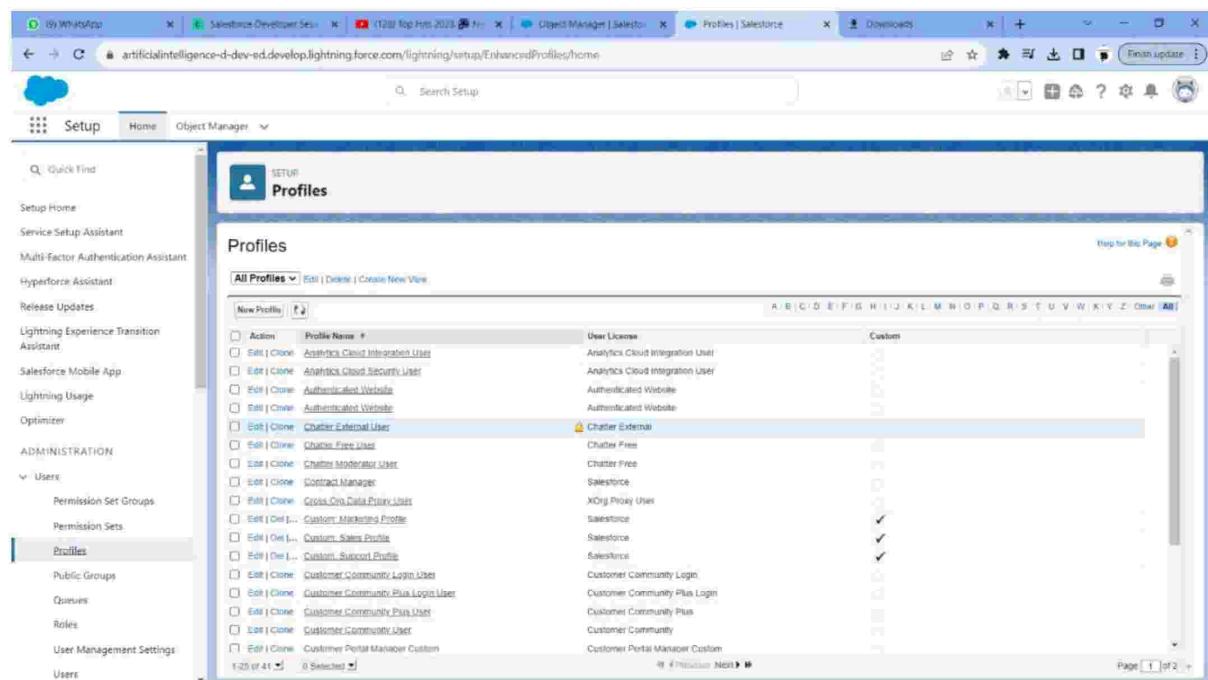
New Contact Edit New Opportunity

History

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under 'User Management'. The main area displays a table of profiles, each with a checkbox, profile name, user license, and status. The profiles listed include:

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

Salesforce Developer Session

Object Manager | Salesforce

Profiles | Salesforce

Downloads

Finish update

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Search Setup

Profiles

All Profiles

Edit | Delete | Create New View

New Profile

Action

Profile Name

User License

Custom

Selected

1 of 7

0 Selected

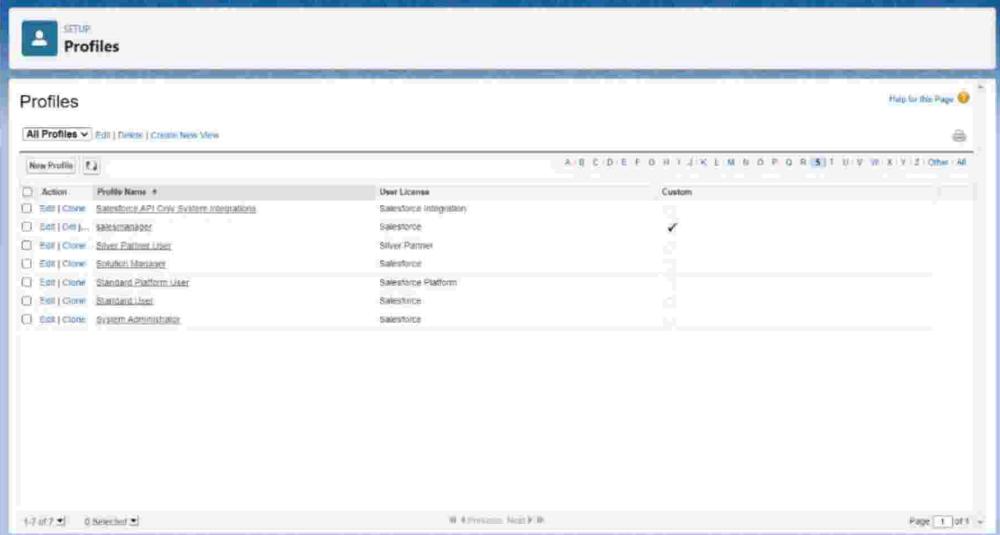
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

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

Help for this Page

W 4 Previous Next Y 8

Page 1 of 1



Salesforce Developer Session

Object Manager | Salesforce

Profiles | Salesforce

Downloads

Finish update

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Search Setup

Profiles

Clone Profile

Enter the name of the new profile.

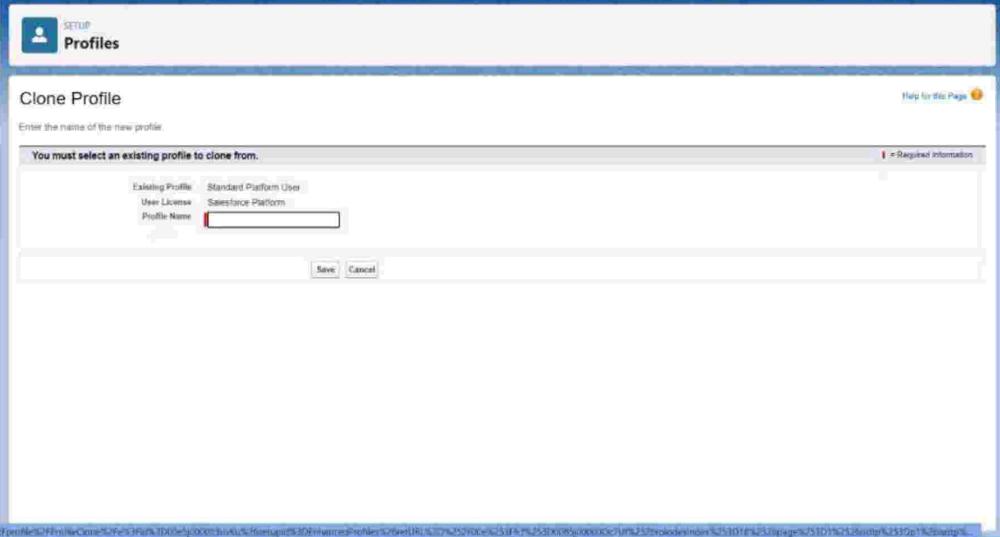
You must select an existing profile to clone from.

Existing Profile

User License

Profile Name

Save Cancel



Salesforce Developer Setup | Object Manager | Salesforce | Profiles | Salesforce | Downloads

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

Profiles

Clone Profile

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page

Salesforce Developer Setup | Object Manager | Salesforce | Profiles | Salesforce | Downloads

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

Profiles

Profile Manager

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

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

Login IP Range 10.10.10.10 | Enabled Apex Class Access 10 | Enabled Visualforce Page Access 10 | Enabled External Data Source Access 10 | Enabled Named Credential Access 10 | Enabled External Credential Principal Access 10 | Enabled Custom Metadata Type Access 10 | Enabled Custom Setting Definition Access 10 | Enabled Flow Access 10 | Enabled Service Endpoint Status Access 10 | Enabled Custom Permission 10.

Profile Detail

Name	Manager
User License	Salesforce Platform
Description	
Created By	GOPAL S 01/10/2023, 7:09 pm
Modified By	GOPAL S 01/10/2023, 7:09 pm

Page Layouts

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

Salesforce Developer Setup | Object Manager | Salesforce | Profiles | Salesforce | Downloads

Setup Home Object Manager

Quick Find

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

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
Analytic Studio (standard__Analytics)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
File (list)	<input checked="" type="checkbox"/>	<input type="radio"/>			

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations:

Standard Tab Settings	Name	Default On	Learning	Default On
Account	Default On	<input checked="" type="radio"/>	Lightning	<input checked="" type="radio"/>
Alert Settings	Default On	<input checked="" type="radio"/>	Unlocked	<input checked="" type="radio"/>

Lightning Bolt Solutions: Contact On

Save Save & New Cancel

Finish update

Salesforce Developer Setup | Object Manager | Salesforce | Profiles | Salesforce | Downloads

Setup Home Object Manager

Quick Find

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

Profiles

Communication Subscription Channel Types

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

Individuals Locations
Party Consents Push Topics Sellers Streaming Channels User External Credentials

Custom Object Permissions

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

Enhancement Requests

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

Salesforce Developer Session

Profiles | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/enhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FreURL%3D%252F00e5j0...

Setup Home Object Manager

Quick Find

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

Profiles

Contact Point Addresses Contact Point Consents Contact Point Emails Sellers Streaming Channels User External Credentials

Custom Object Permissions

	Basic Access	Create	Edit	Delete	View All	Data Administration
Bank	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

	Basic Access	Create	Edit	Delete	View All	Data Administration
Enhancement Requests	<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

Salesforce Developer Session

Profiles | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/enhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FreURL%3D%252F00e5j0...

Setup Home Object Manager

Quick Find

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

Profiles

Custom Object Permissions

	Basic Access	Create	Edit	Delete	View All	Data Administration
Bank	<input type="checkbox"/>					
Customers	<input type="checkbox"/>					

	Basic Access	Create	Edit	Delete	View All	Data Administration
Enhancement Requests	<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

Disclose secret answers for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Update, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage Optimizer, and ADMINISTRATION. Under ADMINISTRATION, the Profiles link is selected. The main content area displays the 'Profiles' setup screen, which includes sections for 'Custom Object Permissions' and 'Session Settings'. In the 'Custom Object Permissions' section, there are two rows: 'Bank' and 'customer'. For 'Bank', permissions are set as follows: Read (checked), Create (checked), Edit (checked), Delete (checked), View All (checked), and Modify All (checked). For 'customer', permissions are set as follows: Read (checked), Create (unchecked), Edit (checked), Delete (checked), View All (checked), and Modify All (unchecked). The 'Session Settings' section contains fields for 'Session Times Out After' (set to '2 hours of inactivity') and 'Session Security Level Required at Login' (set to 'None'). The 'Password Policies' section includes fields for password expiration (90 days), history length (3 passwords remembered), minimum length (8 characters), complexity requirement ('Must include alpha and numeric characters'), password question requirement ('Cannot contain password'), maximum invalid login attempts (10), and lockout effective period (15 minutes). There are also checkboxes for 'Obfuscate secret answer for password reset', 'Require a minimum 1 day password lifetime', and 'Don't immediately expire links in forgot password emails'.

Salesforce Developer Session - artificialintelligence-d-dev-ed.lightning.force.com

Users | Salesforce

New User

User Edit

General Information

First Name	sowmya
Last Name	bela
Alias	sbala
Email	2k20cse179@kiit.ac.in
Username	2k21f@kiit.ac.in
Nickname	User169616771282564526
Title	worker
Company	Kot bank
Department	
Division	

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

Data.com Monthly Addition Limit: Default Limit (500)

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Salesforce Developer Session - artificialintelligence-d-dev-ed.lightning.force.com

Users | Salesforce

New User

User Edit

General Information

First Name	sowmya
Last Name	bela
Alias	sbala
Email	2k20cse179@kiit.ac.in
Username	2k21f@kiit.ac.in
Nickname	User169616771282564526
Title	worker
Company	Kot bank
Department	
Division	

Role: <None Specified>

User License: Salesforce Platform

Profile: Manager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

Data.com Monthly Addition Limit: Default Limit (500)

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The user 'sowmya bala' is displayed with the following details:

Name	sowmya bala
Alias	shaa
Email	2k21it@kiot.ac.in [Verify]
Username	2k21it@kiot.ac.in
Nickname	User1699167712822642616
Title	xacer
Company	kiot bank
Department	
Division	
Address	
Time Zone	(GMT +05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	Only if I am an approver
Federation ID	
App Registration: One-Time Password Authentication	
App Registration: Salesforce Authenticator	

The 'Role' section shows 'User License' set to 'Salesforce Platform' and 'Profile' set to 'Marketing'. Other options like 'Active', 'Marketing User', 'Office User', etc., are also listed.

The screenshot also shows the Gmail inbox with a welcome email from 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:
2k21it@kiot.ac.in

Again, welcome to Salesforce!

Finish update

salesforce

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password: good

* Confirm New Password: Match

Security Question: * In what city were you born?

* Answer: saleni

Change Password

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

Log in | Salesforce

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

Incognito Finish update

salesforce

Username: 2k21it@kiot.ac.in

Password:

Log In

Remember me

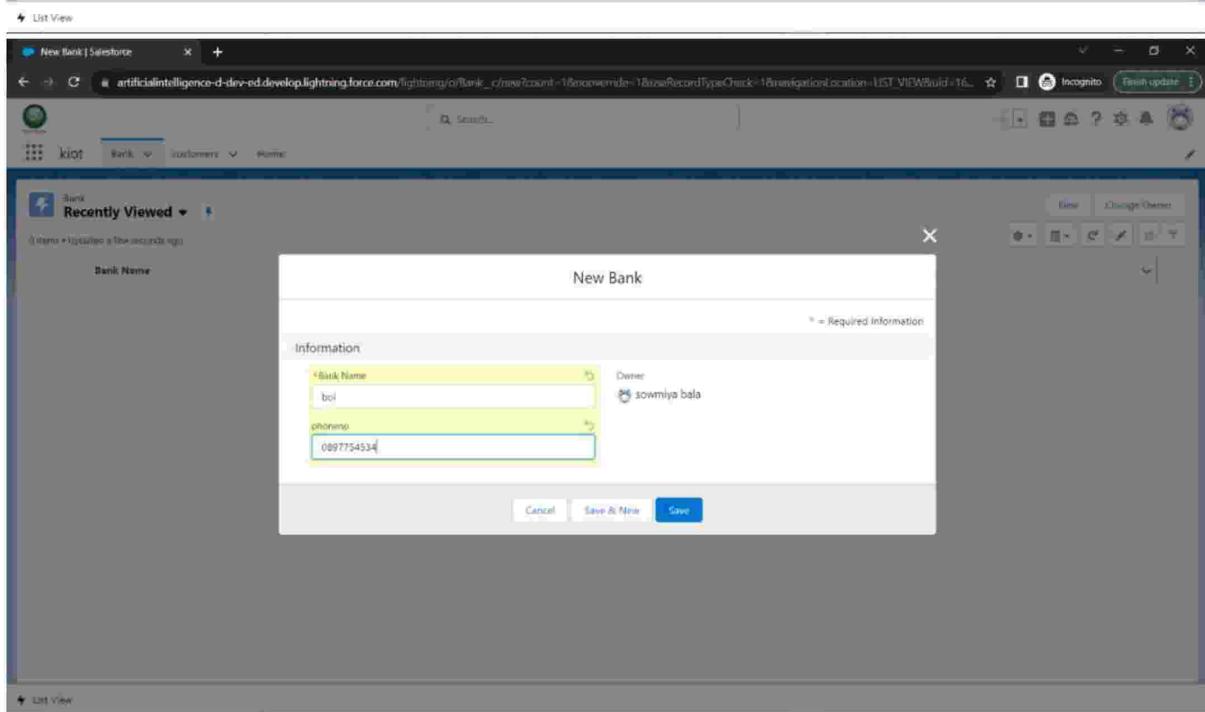
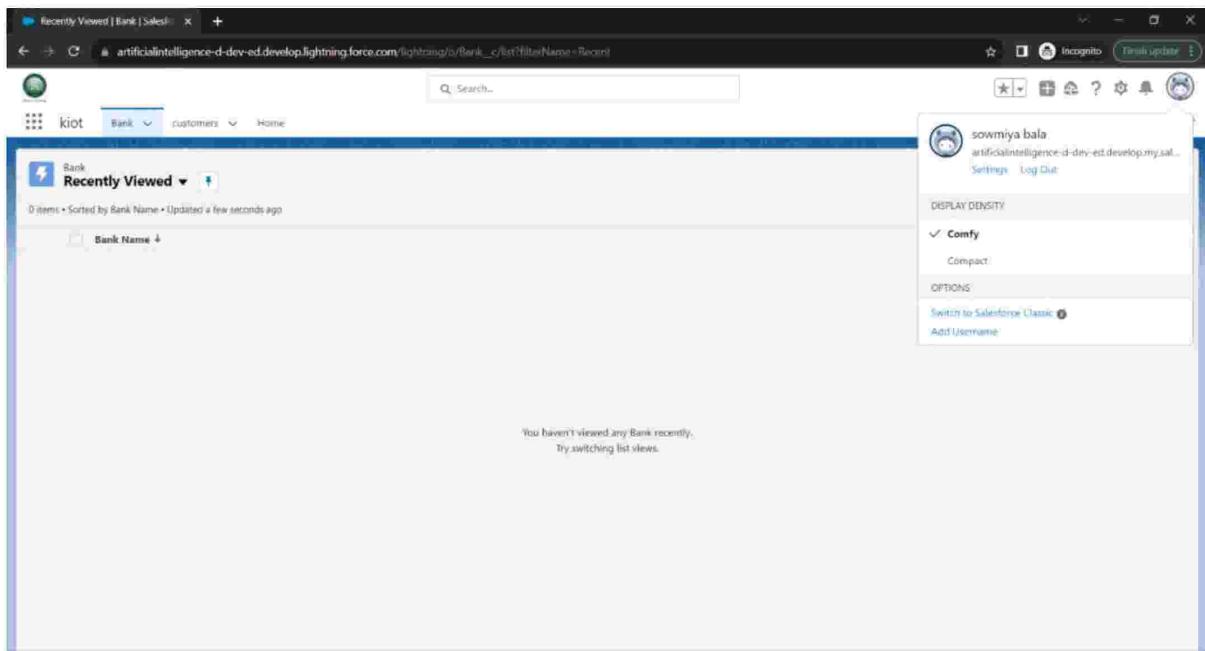
[Forgot Your Password?](#)

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

[WATCH ON DEMAND](#)

AIDay

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The screenshot displays two screenshots of the Salesforce Lightning Experience interface.

Top Screenshot: A "New customer" modal window is open. The "Information" section contains two required fields: "customer Name" (set to "madhu") and "Rank" (set to "bol"). The "Save" button is highlighted in blue.

Bottom Screenshot: The "customer" page for "madhu" is shown. The top banner indicates "customer 'madhu' was created." The "Details" tab is selected, displaying the following information:

- Related:** Shows the customer's name and rank.
- Details:** Shows the customer's name and rank, along with "Created By" (sowmiya bala) and "Last Modified By" (sowmiya bala).

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

Top Screenshot: The user is viewing the "Profiles" page under the "Profiles" section of the Setup menu. The page title is "Profiles". It shows a list of profiles with columns for Action, Profile Name, and User License. One profile, "Standard Platform User", is selected. The "User License" column for this profile shows "Salesforce Platform".

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

Bottom Screenshot: The user is in the "Clone Profile" dialog. The title is "Clone Profile". A message at the top says "You must select an existing profile to clone from." Below this, there is a table with three rows: "Existing Profile" (radio button selected), "User License" (radio button selected), and "Profile Name" (text input field containing "salesmanager"). At the bottom of the dialog are "Save" and "Cancel" buttons.

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQCE%3Fsetupid%3DEnhancedPr... | Profiles | Salesforce | Welcome to Salesforce Verify | +

Setup Home Object Manager

Quick Find

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION

Users: Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Quotas, Roles, User Management Settings, Users

Profiles

Profile salesmanage

Help for this Page

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 Range ID: Enabled Home Class Access ID: Enabled Visualforce Page Access ID: Enabled External Data Source Access ID: Enabled Named Credential Access ID: Enabled External Credential Principal Access ID: Enabled Custom Metadata Type Access ID: Enabled Custom Settings Definition Access ID: Enabled Flow Access ID: Enabled Service Presence Status Access ID: Enabled Custom Permissions ID:

Profile Detail

Name: salesmanage, User License: Salesforce Platform, Description: Created By: GOPAL_S, 01/10/2023, 7:19 pm, Modified By: GOPAL_S, 01/10/2023, 7:19 pm, Custom Profile:

Page Layouts

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQCE%3Fsetupid%3DEnhancedPr... | Profiles | Salesforce | Welcome to Salesforce Verify | +

Setup Home Object Manager

Quick Find

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION

Users: Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Quotas, Roles, User Management Settings, Users

Profiles

Profile Edit

Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit

Name: salesmanage, User License: Salesforce Platform, Description: Custom Profile

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On
<input type="radio"/>	<input checked="" type="radio"/> Learning
<input type="radio"/>	<input type="radio"/> Baseline

Salesforce Developer Session

Profiles | Salesforce

Welcome to Salesforce Verify

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Custom Object Permissions

Contact Point Emails

Unit External Checklists

Bank

customers

Basic Access

Data Administration

Enhancement Requests

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

Observe secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Salesforce Developer Session

Profiles | Salesforce

Welcome to Salesforce Verify

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Group

Queues

Roles

User Management Settings

Users

Custom Object Permissions

Contact Point Emails

Unit External Checklists

Bank

customers

Basic Access

Data Administration

Enhancement Requests

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

Observe secret answer for password resets

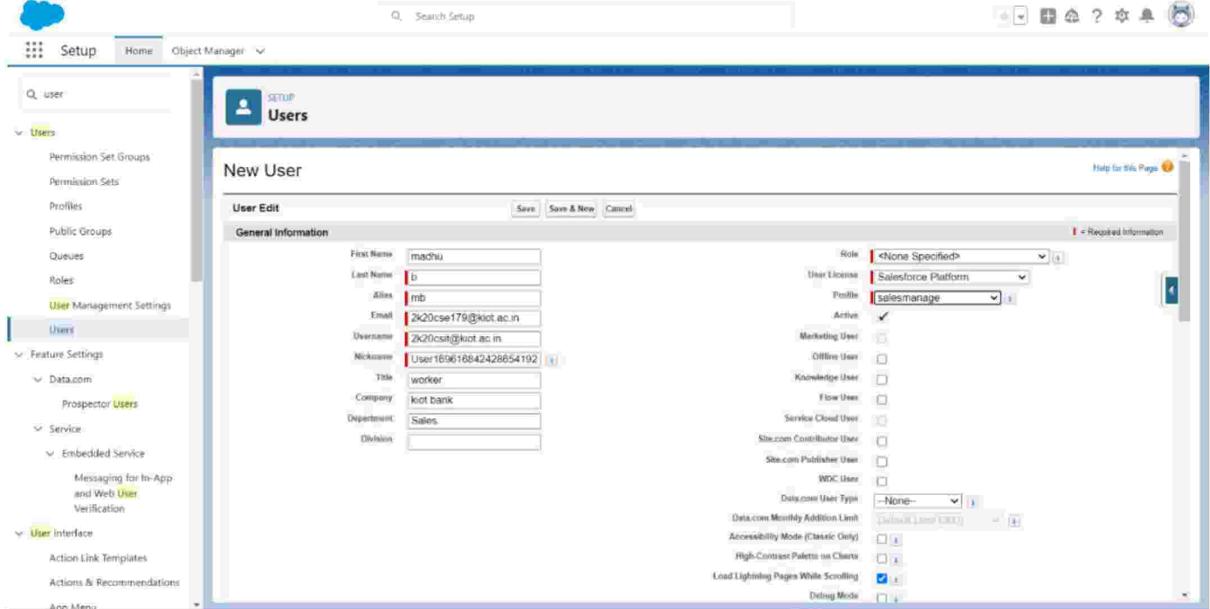
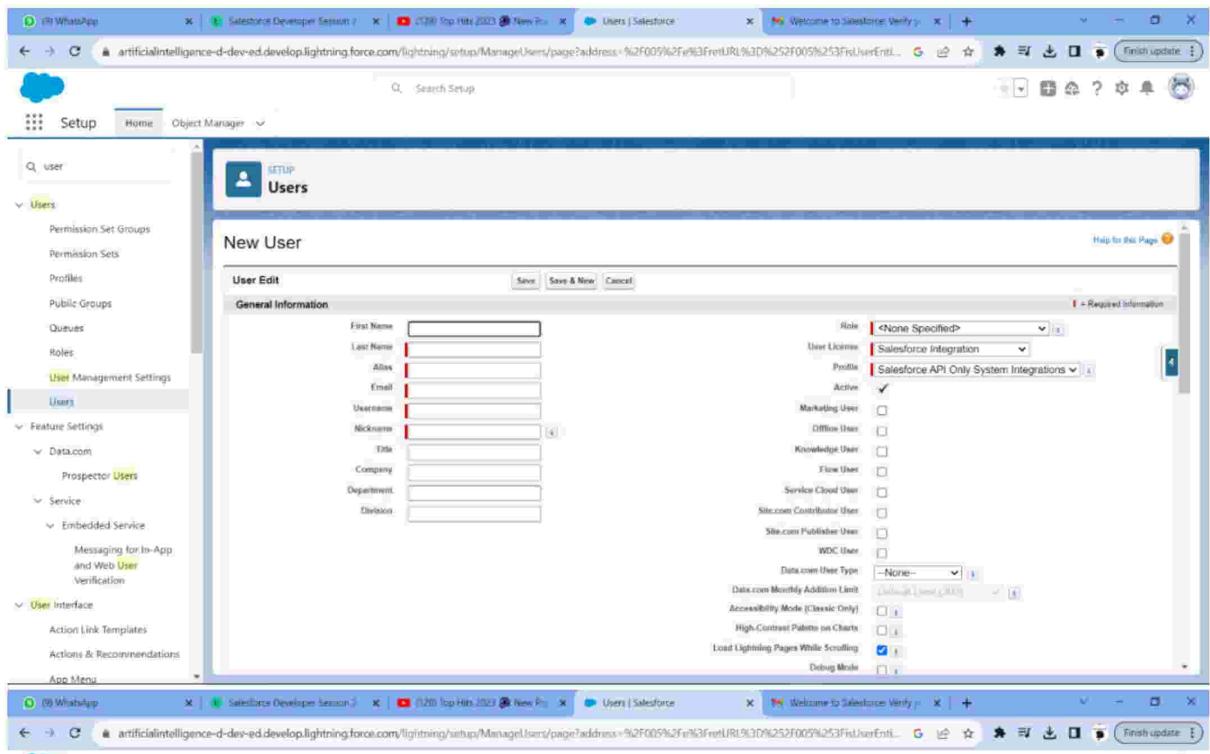
Require a minimum 1 day password lifetime

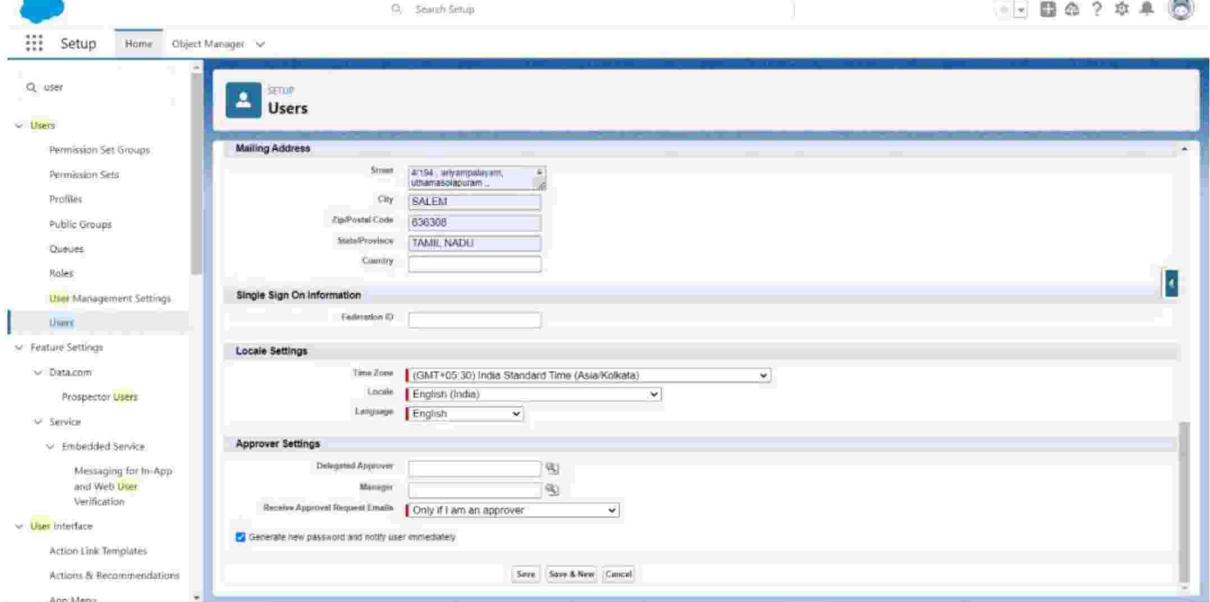
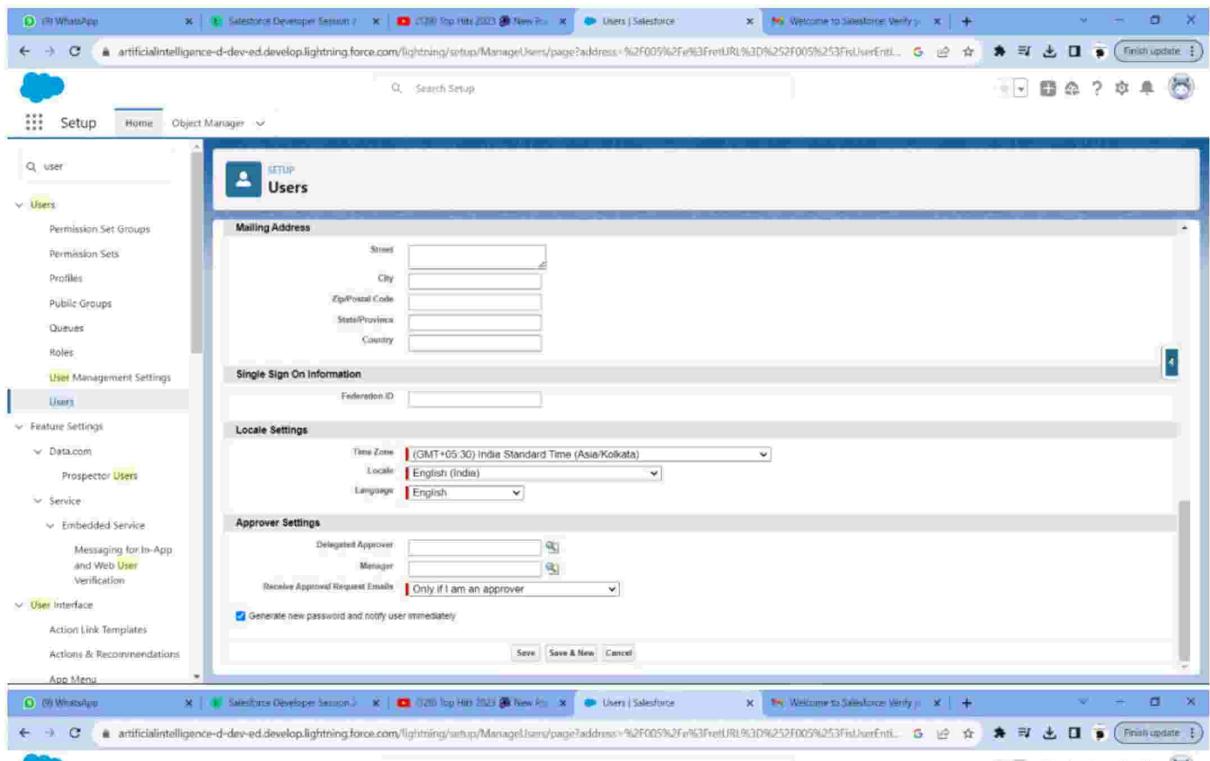
Don't immediately expire links in forgot password emails

Save

Save & New

Cancel





Salesforce Developer Session

[https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers?pageAddress=%2F005\\$0000MUVV%3Fredirect%3D1%26isUserEn...](https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers?pageAddress=%2F005$0000MUVV%3Fredirect%3D1%26isUserEn)

Setup Home Object Manager

Search Setup

User madhu b

User Detail

Name	madhu b	Role	Marketing User
Alias	mb	User Profile	Administrator
Email	2k20csit19@kiot.ac.in [Verify]	Active	<input checked="" type="checkbox"/>
Username	2k20csit@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User16991684242805419206	Office User	<input type="checkbox"/>
Title	worker	Knowledge User	<input type="checkbox"/>
Company	kiot bank	Flow User	<input type="checkbox"/>
Department	Sales	Service Cloud User	<input type="checkbox"/>
Division	A101_Ammappayam, umamaisapuram - Parikkodu , salem-636108	Salesforce Contributor User	<input type="checkbox"/>
Address	SALEM 636108 TAMIL NADU	Salesforce Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input type="checkbox"/>
Language	English	Data.com User Type	<input type="checkbox"/>
Delegated Approver	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 in Charts	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authentication		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

Finish update

Gmail

Compose

Inbox 5,318

Starred

Snoozed

Sent

Drafts

More

Labels +

Search in mail

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:
[https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers?pageAddress=%2F005\\$0000MUVV%3Fredirect%3D1%26isUserEn...](https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers?pageAddress=%2F005$0000MUVV%3Fredirect%3D1%26isUserEn)

Username:
2k20csit@kiot.ac.in

Again, welcome to Salesforce!

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 Salesforce.com, Inc. Two Landmark Pt, One Market, Suite 100, San Francisco, CA 94103, United States

Reply Forward

Change Your Password | Salesforce

artificialintelligence-d-dev-ed.develop.my.salesforce.com/u/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&retURL=ChangeP... Incognito Fresh update



Change Your Password

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

- 8 characters
- 1 letter
- 1 number

New Password: Good

Confirm New Password: MATCH

Security Question: In what city were you born?

Answer: india

Change Password

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

Recently Viewed | Bank | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/list?filterName=Recent Incognito Fresh update

kiot Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

List View

Recently Viewed | customers

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

Setup

Permission Sets

Permission Sets

This page allows you to create, view, and manage permission sets. In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play.

All Permission Sets

Action	Permission Set Label	Description	Licence
<input type="checkbox"/>	Access to Activities	Allows access to the store. Lets users see products and categories. Includes all buyer capabilities, and allows access to manage carts and orders.	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Denotes that the user is a Sales Cloud or Service Cloud user.	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	Denotes that the user is a Sales Cloud or Service Cloud user.	Commerce Admin
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Customer Experience Profile Manager	Allows users create, read, edit, and delete location, sublocations, queue, and service level agreements.	Salesforce
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/>	Field Service Mobile Standard Permissions	Allow access to commerce merchandising features.	Commerce Merchandiser User
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Creations Manager	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Worker	Limited access to Order Management features for Self Service.	Lightning Order Management User

Page 1 of 2

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:

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

Organization-Wide Defaults:

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

Testing:

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

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar navigation includes 'User Management Settings' under 'Users', 'Feature Settings', 'Data.com', 'Service', 'Embedded Service', and 'User Interface'. The main content area displays a table of permission sets with columns for 'Action', 'Permission Set Label +', 'Description', and 'License'. The table lists various permission sets such as 'Access to activity', 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', 'Facility Manager', 'Field Service Mobile Standard Permissions', 'Merchandise', 'Order Management Area', 'Order Management Operations Manager', and 'Order Management Shopper'. The 'Description' column provides a brief overview of each permission set's features, and the 'License' column indicates which license is required for each.

Action	Permission Set Label +	Description	License
<input type="checkbox"/>	Access to activity	Allows access to the store. Lets users see products and categories....	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all Buyer capabilities, and allows access to manage carts and...	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	Denotes that the user is a Sales Cloud or Service Cloud user.	Commerce Admin
<input type="checkbox"/>	Commerce Admin	Allows access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Salesforce
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, autocalling, queu...	Facility Manager
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app. 3...	Field Service Mobile
<input type="checkbox"/>	Field Service Mobile Standard Permissions	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	Merchandise	Read Access to all entities installed by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Area	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Limited access to Order Management features for Self Service.	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper		

Salesforce Developer Setup | artificialintelligence-d-dev-ed.lightning.force.com

Permission Sets | Salesforce | Finish update

Setup Home Object Manager

User Management Settings

Users

Profile

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Search Setup

Permission Set Create

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

Not sure what a permission set license is? Learn more here.

License: -None-

Save Cancel

Help for this Page

This screenshot shows the 'Permission Sets' section of the Salesforce setup interface. On the left, a sidebar lists various user management settings like profiles, public groups, and roles. The main area is titled 'Create' and shows a form for defining a new permission set. The 'Label' field contains 'salesmanager', and the 'API Name' field also contains 'salesmanager'. There's a description field and a checkbox for 'Session Activation Required'. Below this, there's a section for selecting user types, with options for choosing a specific user license or a specific permission set license. A note about permission set licenses is present, along with a 'Learn more here' link. The bottom of the screen has 'Save' and 'Cancel' buttons.

Salesforce Developer Setup | artificialintelligence-d-dev-ed.lightning.force.com

Permission Sets | Salesforce | Finish update

Setup Home Object Manager

User Management Settings

Users

Profile

Public Groups

Queues

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Actions & Recommendations

App Menu

Search Setup

Permission Set Create

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

Not sure what a permission set license is? Learn more here.

License: -None-

Save Cancel

Help for this Page

This screenshot is identical to the one above, showing the 'Create' page for a new permission set named 'salesmanager'. The fields and layout are the same, with the 'Label' and 'API Name' both set to 'salesmanager'. The rest of the interface, including the sidebar and the 'Select the type of users...' section, is also identical.

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

Permission Set Overview:

- Description: salesmanager
- License: Standard
- Session Activation Required: No
- Last Modified By: QPAL_S (01/10/2023, 7:29 pm)
- API Name: salesmanager
- Namespace Prefix: QPAL_S
- Created By: QPAL_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.

Screenshot of the Salesforce Permission Sets page for the 'salesmanager' permission set, showing the 'Object Settings' tab.

Object Settings:

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	✓
AI Intent Reasons	No Access	—	✓
AI Record Insights	No Access	—	✓
Alternative Payment Methods	No Access	27	✓
API Analytics 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 Schedule Aggregates	No Access	—	✓
Appointment Schedule Logs	No Access	—	✓
Appointment Topic Time Slots	No Access	8	✓
Asset Actions	No Access	30	✓
Asset Action Sources	No Access	19	✓
Asset Relationships	—	10	✓
Assets	No Access	42	✓
Asset State Periods	No Access	11	✓

Two screenshots of the Salesforce Setup interface showing the 'Permission Sets' page.

The top screenshot shows the 'Bank' tab selected. Under 'Object Permissions', the 'Read' and 'View All' checkboxes are checked. Under 'Field Permissions', the 'Read Access' and 'Edit Access' checkboxes for 'Bank.Name' are checked.

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

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

The bottom screenshot shows the 'User' tab selected. Under 'Object Permissions', the 'Create' and 'Edit' checkboxes are checked. Under 'Field Permissions', the 'Edit Access' checkbox for 'Bank.Name' is checked.

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

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

Salesforce Setup screen showing the 'Current Assignments' page for the 'salesmanager' permission set. The sidebar navigation includes 'User Management Settings' under 'Users'.

The main content area displays a cactus and sun icon, with the message "No assignments defined." and a "Add Assignment" button.

Salesforce Setup screen showing the 'Select Users To Assign' dialog. The sidebar navigation includes 'User Management Settings' under 'Users'.

The dialog lists users with checkboxes for selection. One user, 'madhu b.', has a checked checkbox.

Full Name	Username	Role	Profile
Amelia Ellington	seli	Force.com - App Subscription User	
Chatter Expert	chatty	Chatter Free User	
Diya Adarna	datan	UAMS User	
GOPALS	GS	System Administrator	
Integration User	Integ	Analytics Cloud Integration User	
<input checked="" type="checkbox"/> madhu b.	mb	salesmanager	
Security User	sec	Analytics Cloud Security User	
sreeni bala	sbala	Manager	

Salesforce Developer Setup | artificialintelligence-d-dev-ed.lightning.force.com

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

Time Zone: Select a time zone...

Selected Users

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

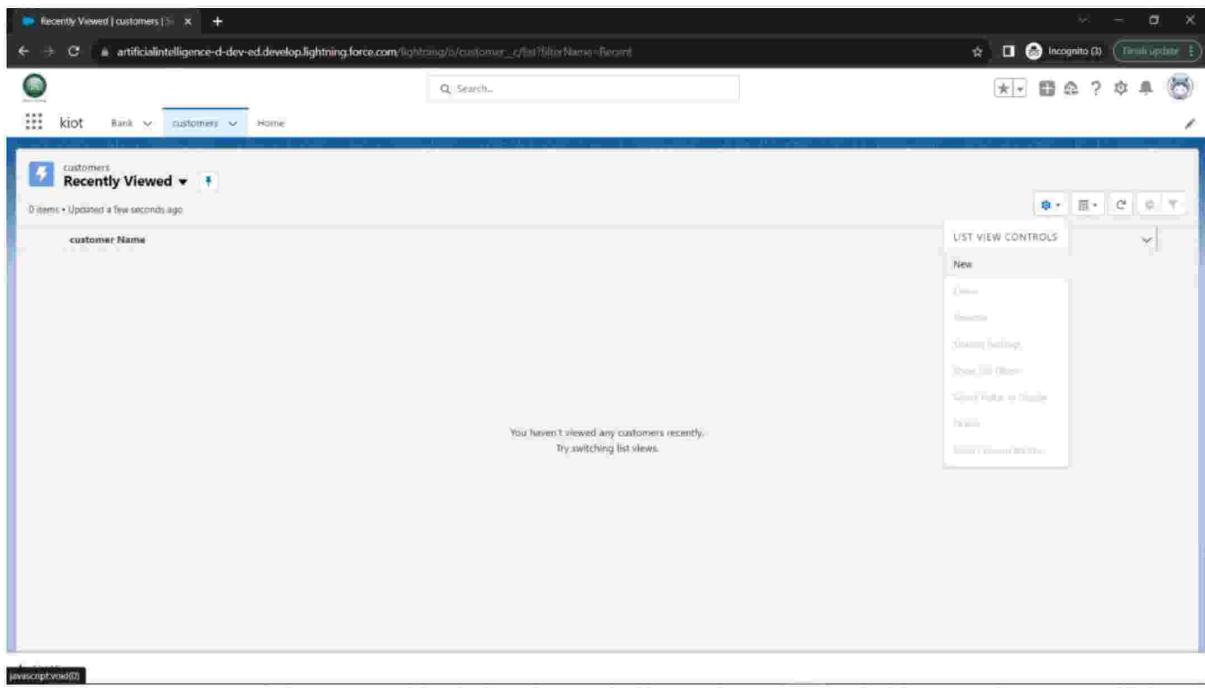
Cancel Assign

1 assignments were successful.

Assignment Summary

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

Done

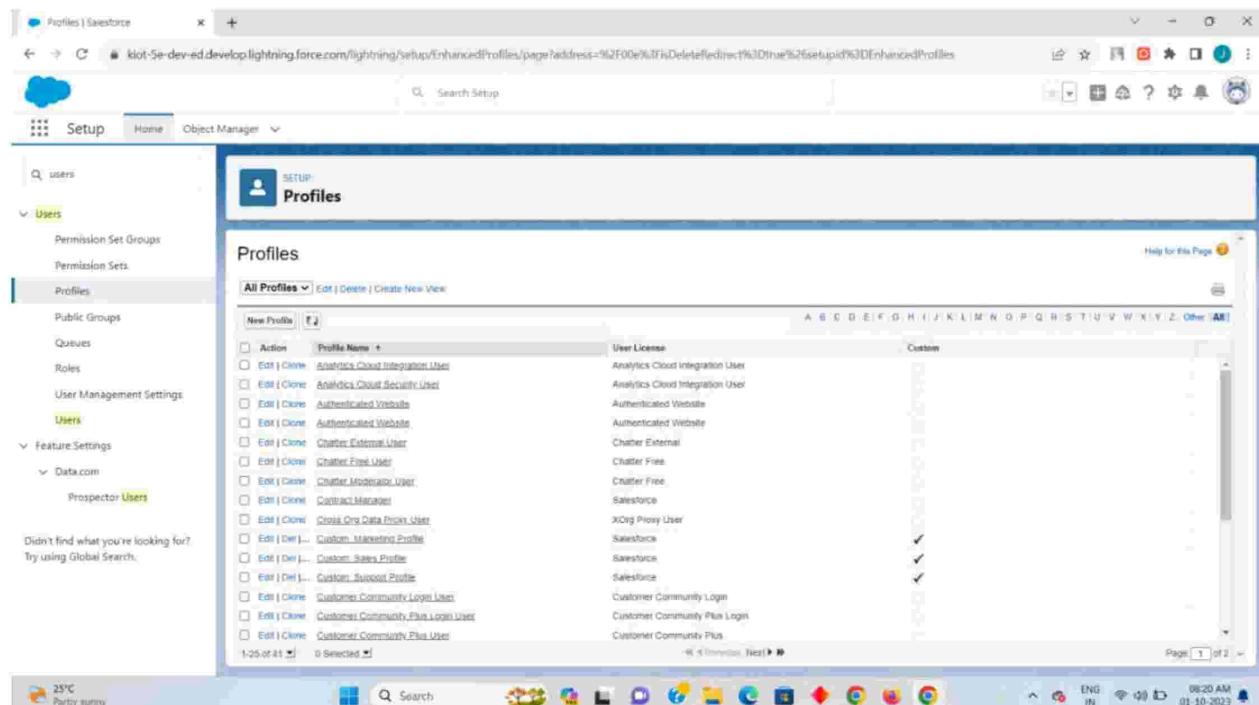


3.. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

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

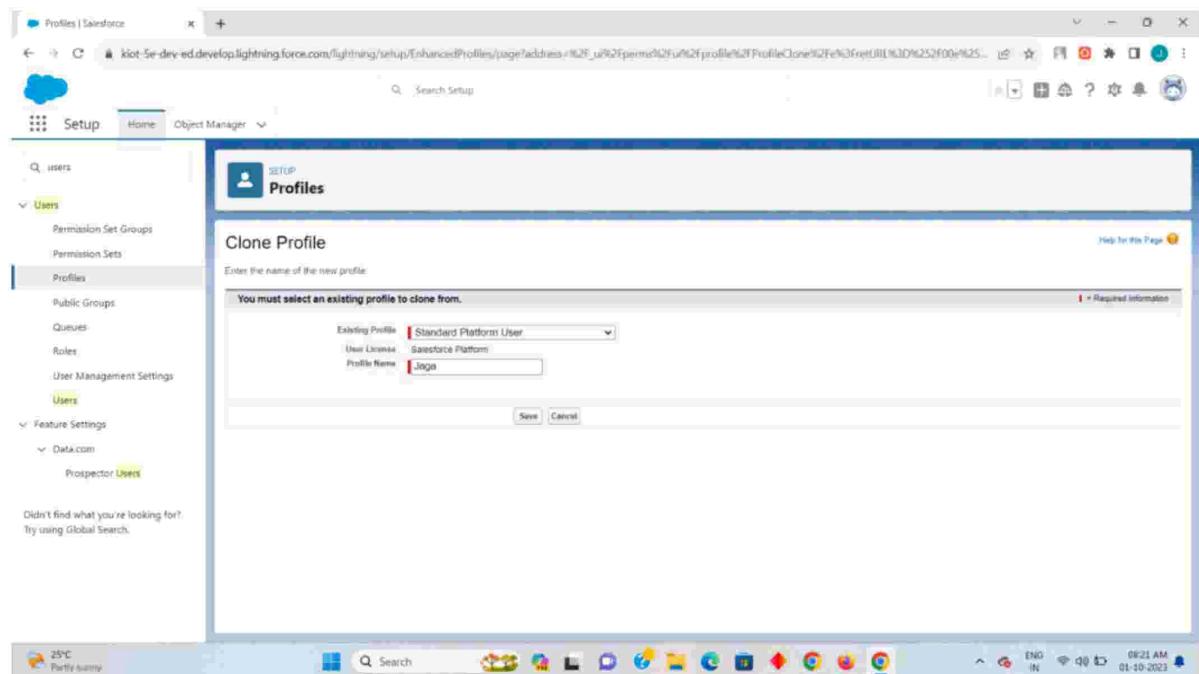
Setup-quick search[profile]



The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar navigation includes 'Setup' (selected), 'Home', 'Object Manager', and sections for 'Users' (selected), 'Feature Settings', and 'Data.com'. Under 'Users', there are links for 'Prospector' and 'Users'. A global search bar at the top is empty. The main content area is titled 'Profiles' and displays a table of existing profiles. The table columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Action' column contains links for 'Edit | Clone'. The 'Profile Name' column lists various profiles such as 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External User', etc. The 'User License' column shows the license for each profile. The 'Custom' column contains checkmarks for some profiles. At the bottom of the table, there are navigation links for 'Previous' and 'Next' pages, and a note indicating '1-25 of 41' profiles found. The status bar at the bottom right shows the date '01-10-2023' and time '08:20 AM'.

Step 2:

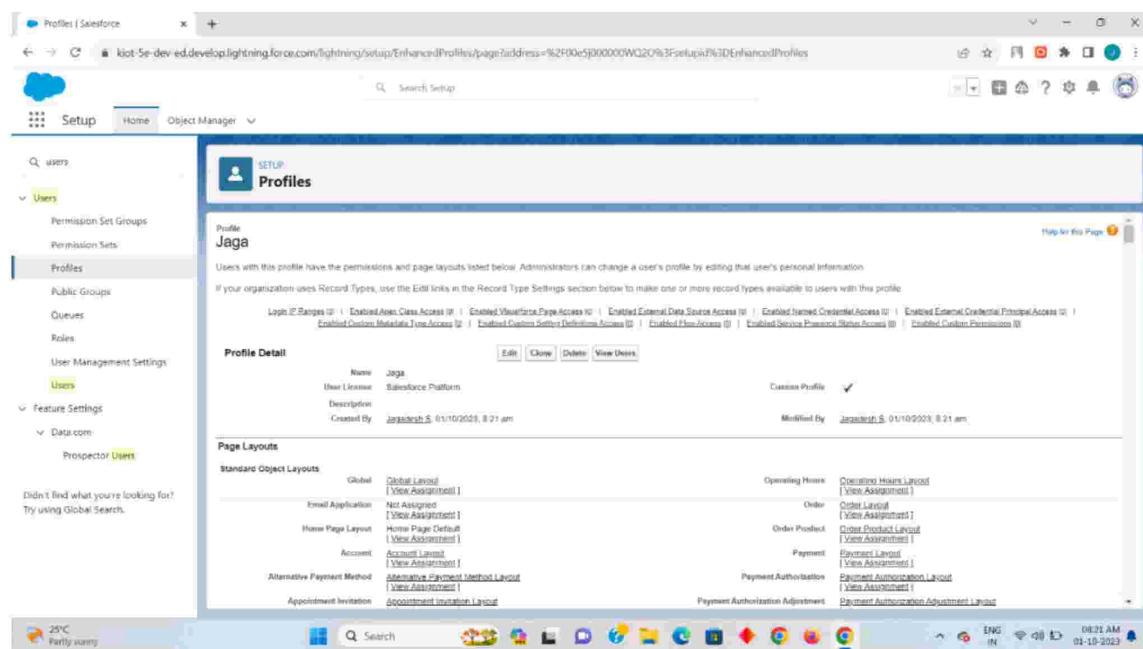
Click on the new to create a new profile along with the label and Api



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

Step 3:

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



Profiler | Salesforce

http://kot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e500000W02C%2Fv%8-ne0P1%1D%252f00e500000W02C%253fsetupId...

Setup Home Object Manager

Q users

v Users

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

v Feature Settings

- Data.com
- Prospector Users

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

SETUP Profiles

Communication Subscription Contracts Communication Subscription Timings Contacts Contact Point Addresses Contact Point Comments Contact Point Emails Locations Party Comments Posts Topics Sellers Streaming Channels User External Credentials

Custom Object Permissions

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

Session Settings

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

Enable different Experience Cloud login policies for employees: Separate Experience Cloud site and Salesforce login authentication for employees Relax login IP restrictions Skip employee device authentication during Experience Cloud site login

23°C Partly sunny 08:21 AM 01-10-2023

Profiles | Salesforce

http://kot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e500000W02C%2Fv%8-ne0P1%1D%252f00e500000W02C%253fsetupId...

Setup Home Object Manager

Q users

v Users

- Permission Set Groups
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Try using Global Search:

SETUP Profiles

Communication Subscription Contracts Communication Subscription Timings Contacts Contact Point Addresses Contact Point Comments Contact Point Emails Locations Party Comments Posts Topics Sellers Streaming Channels User External Credentials

Custom Object Permissions

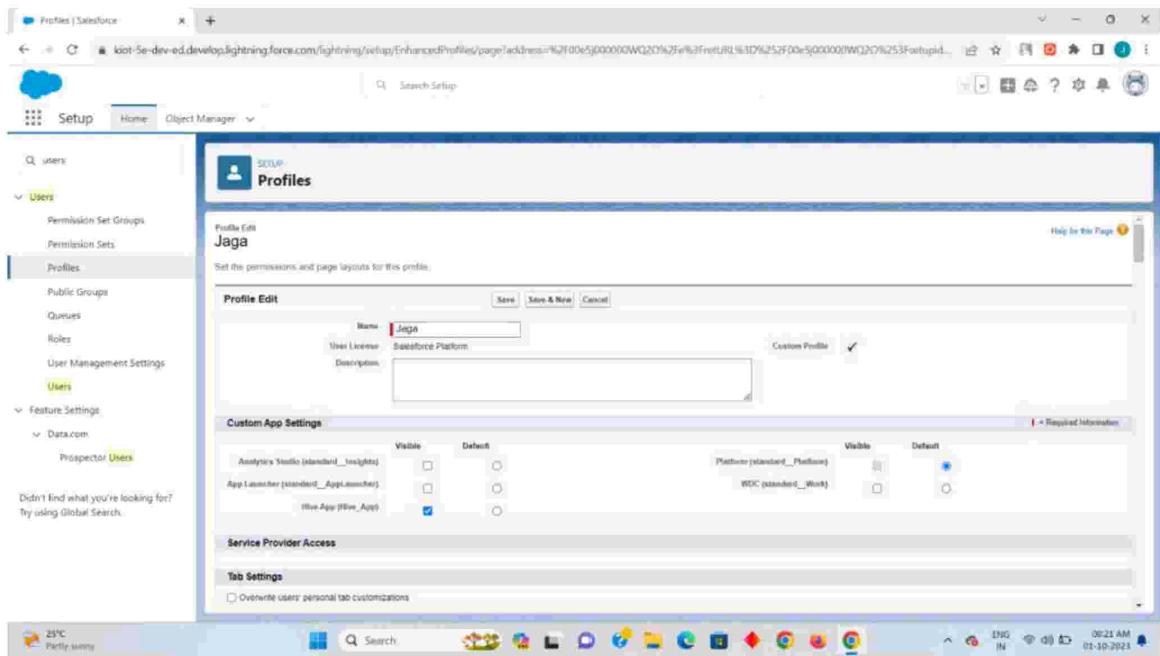
	Basic Actions	Detail Administration		Basic Actions	Detail Administration									
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All	
Providers	<input checked="" type="checkbox"/>													
Resources	<input checked="" type="checkbox"/>													

Session Settings

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

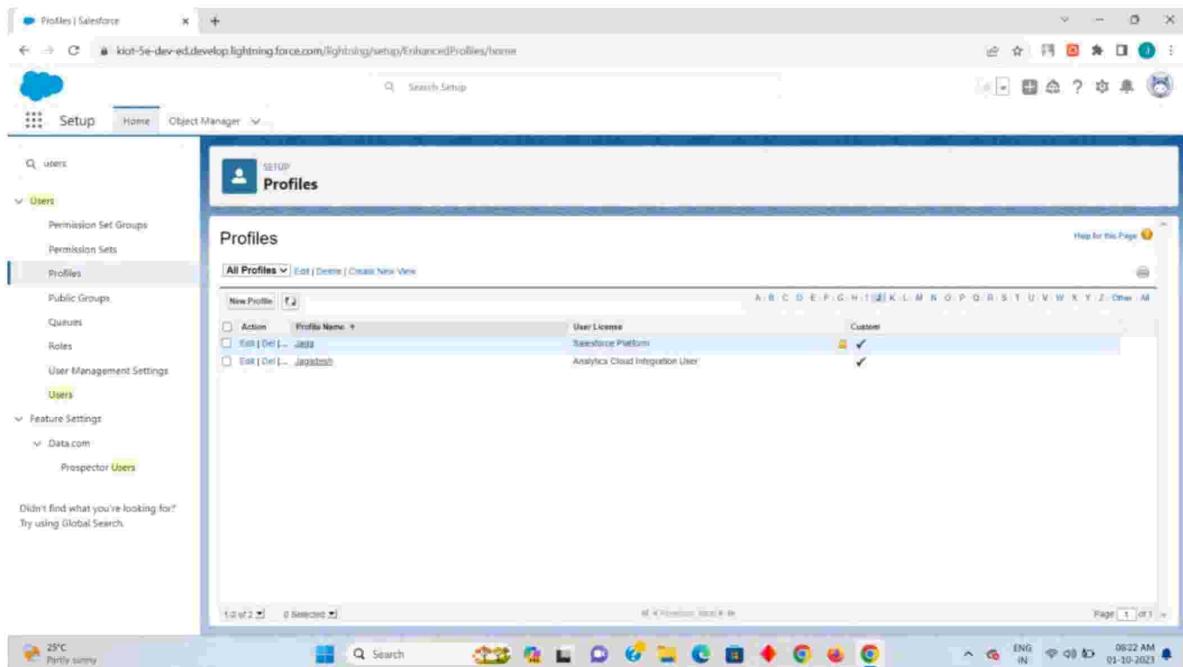
Enable different Experience Cloud login policies for employees: Separate Experience Cloud site and Salesforce login authentication for employees Relax login IP restrictions Skip employee device authentication during Experience Cloud site login

23°C Partly sunny 08:21 AM 01-10-2023



Step 4

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



Step 5:

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Free User	Chatty	chatty_001@00000c0@email-for-test@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Customer Community User	Jane	jane_gran@yoursite.name.cz?#2kcom3@gmail.com	CEO	<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	Standard Platform User	JS	jaga222@gmail.com	SF Admin	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	System Administrator	s.jayadev	s.jayadev@gmail.com	Chatter Sales Team	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Standard Platform User	JS	s.jayadev001@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Analyst Cloud Integration User	Integrator	integrator@00009000000d1mcnear.com		<input checked="" type="checkbox"/>	Analyst Cloud Integration User
<input type="checkbox"/>	Analytics Cloud Security User	sec	magentasecurity@000000000000000f@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

User | Salesforce

Setup Home Object Manager

Q Users

v **Users**

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

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

28°C Petty Samy

Search

New User

User Edit Save Save & New Cancel

General Information

First Name	Jagadeesh11
Last Name	B
Alias	B
Email	jag123@gmail.com
Username	jag123@gmail.com
Nickname	User160612875144962962
Title	
Company	
Department	
Division	

Role Director, Channel Sales

User License Salesforce Platform

Profile -None- Jag

Active -None- Jag

Marketing User Standard Platform User

Offline User

Flow User

Service Cloud User

Salesforce Contributor User

Marketing Publisher User

WCC User

Data.com User Type -None-

Data.com Monthly Activity Limit Default (Low) 1000

Accessibility Mode (Classic Only)

High-Contrast Palette on Checks

Help for this Page

User | Salesforce

Setup Home Object Manager

Q Users

v **Users**

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

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

28°C Petty Samy

Search

New User

User Edit Save Save & New Cancel

General Information

First Name	Jagadeesh22
Last Name	B
Alias	B
Email	jag1@gmail.com
Username	jag1@gmail.com
Nickname	User160612879863618745
Title	
Company	
Department	
Division	

Role Marketing Team

User License Salesforce Platform

Profile -None- Jag

Active -None- Jag

Marketing User Standard Platform User

Offline User

Flow User

Service Cloud User

Salesforce Contributor User

Marketing Publisher User

WCC User

Data.com User Type -None-

Data.com Monthly Activity Limit Default (Low) 1000

Accessibility Mode (Classic Only)

High-Contrast Palette on Checks

Help for this Page

User | Salesforce

Setup Home Object Manager

Q Users

v **Users**

- Permission Set Groups
- Permission Sets
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- User Management Settings
- Users**
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- Data.com
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Didn't find what you're looking for? Try using Global Search.

28°C Petty Samy

Search

All Users

On this page you can create, view, and manage users. In addition, download Salesforce1 to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices. iOS | Android

View: **Actions** | All | Create New User

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Test_Sales	ts	test000@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Test_Support	ts	wtr@gmail.com	Support	<input type="checkbox"/>	System Administrator
<input type="checkbox"/>	Test_Sales2	ts	jag112@gmail.com	Channel Sales Team	<input checked="" type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	Test_Jagadeesh	jag	jag123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jag
<input checked="" type="checkbox"/>	Test_Jagadeesh2	b	test000@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jag

New User Reset Password(s) Add Multiple Users

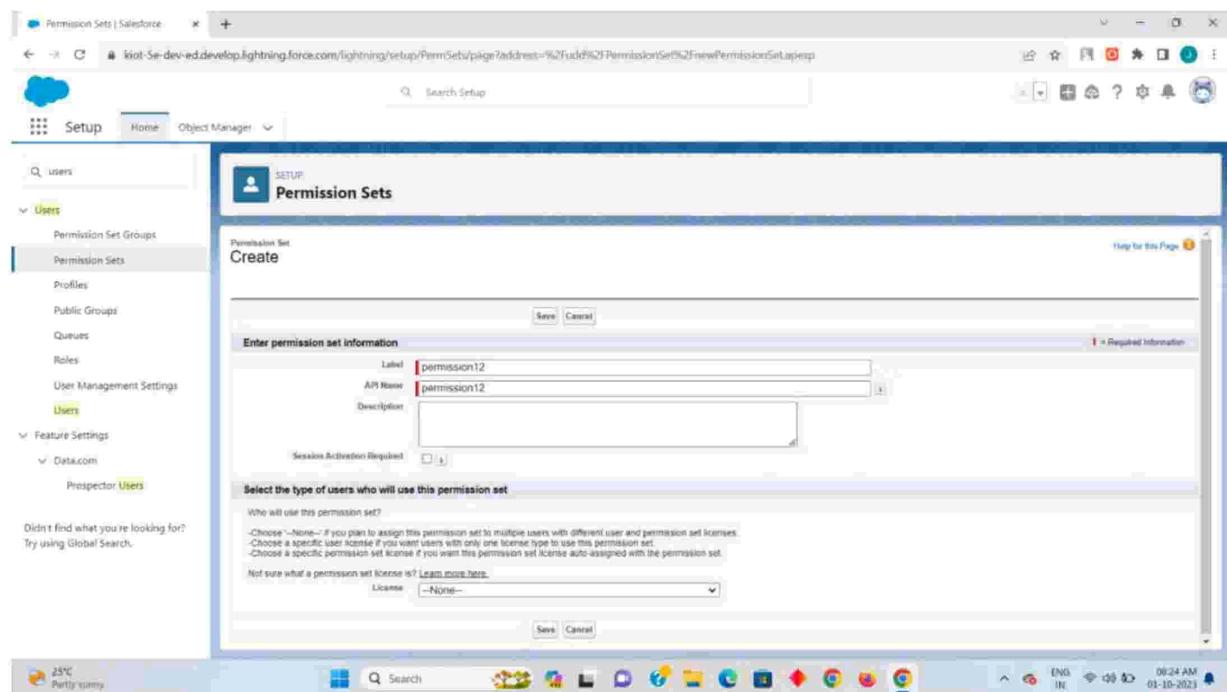
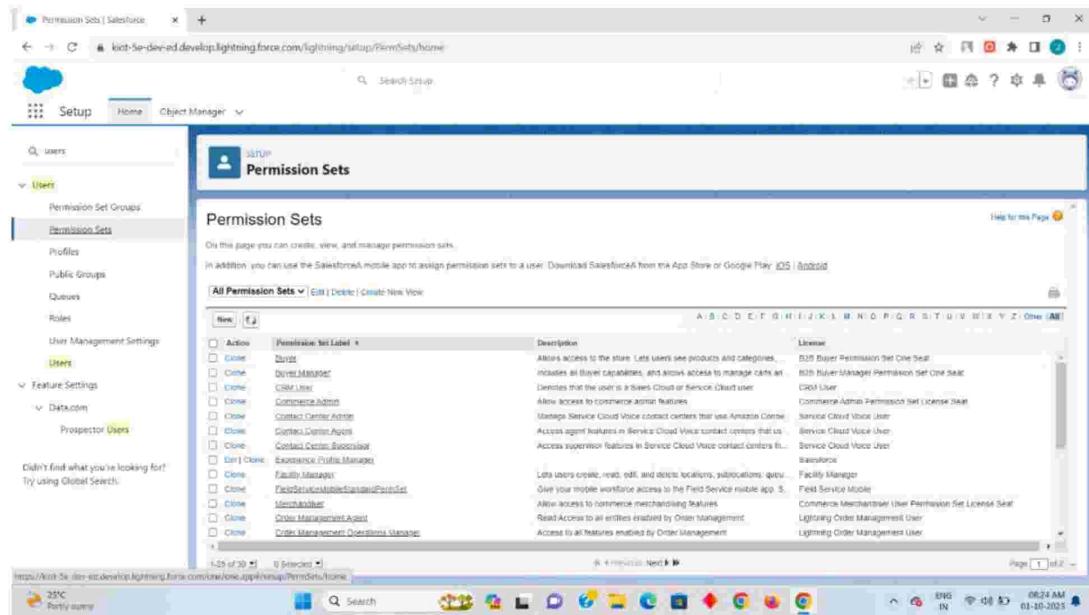
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Clear All

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

Step 6:

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

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



Permission Sets | Salesforce

kot-5e-dev-ed.lightning.force.com/lightning/setup/permSets/page?address=%2f0P5y00000Pgta%3f&fdcFrameOrigin%3Dhttps%253A%252Fkot-5e-dev-ed.devel...

Setup Home Object Manager

Q users

v Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

v Feature Settings

v Data.com

Prospector Users

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

25°C Partly sunny

Search Setup

Permission Sets

permission12

API Name permission12
Namespace Prefix
Created By amadush_8 01/10/2023, 8:24 am

Last Modified By amadush_8 01/10/2023, 8:24 am

Permission Set Overview

Description
License
Session Activation Required
Last Modified By

Apps

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

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

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

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

Apex Class Access
Permissions to execute Apex classes.

Visualforce Page Access
Permissions to execute Visualforce pages.

External Data Source Access

Video Tutorial | Help for this Page

Permission Sets | Salesforce

kot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2f0P5y00000Pgta%3f&fdcFrameOrigin%3Dhttps%253A%252Fkot-5e-dev-ed.devel...

Setup Home Object Manager

Q users

v Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

v Feature Settings

v Data.com

Prospector Users

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

25°C Partly sunny

Search Setup

Permission Sets

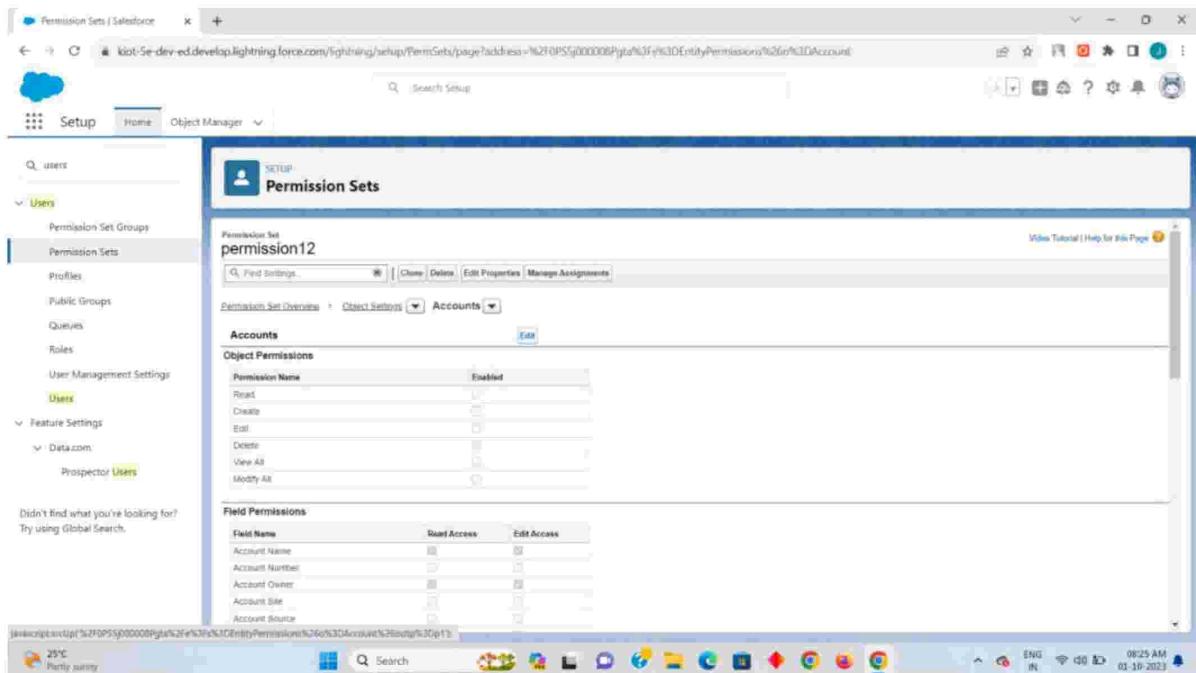
permission12

Object Settings

Object Name

Object Name	Object Permissions	Total Fields	Tab Settings
Account Standard	No Access	9	—
Attribute	No Access	44	—
AI Image Reasons	No Access	—	—
AI Recent Images	No Access	—	—
Alternative Payment Methods	No Access	27	—
API Activity Event Status	No Access	14	—
App Analytics Query Requests	No Access	—	—
Appointment Usage Assessments	No Access	—	—
Assessment Categories	No Access	3	—
Assessment Invitations	No Access	17	—
Assessment Invites	—	4	—
Assessment Schedule Appointments	No Access	—	—
Assessment Schedule Logs	No Access	—	—
Assessment Topic Time Slots	No Access	5	—
Asset Actions	No Access	30	—
Asset Action Sources	No Access	18	—

Video Tutorial | Help for this Page



Step 7:

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

The screenshots illustrate the configuration of a Permission Set in the Salesforce Setup. The permission set is named 'permission12'.

Object Permissions:

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

Field Permissions:

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

Step 8

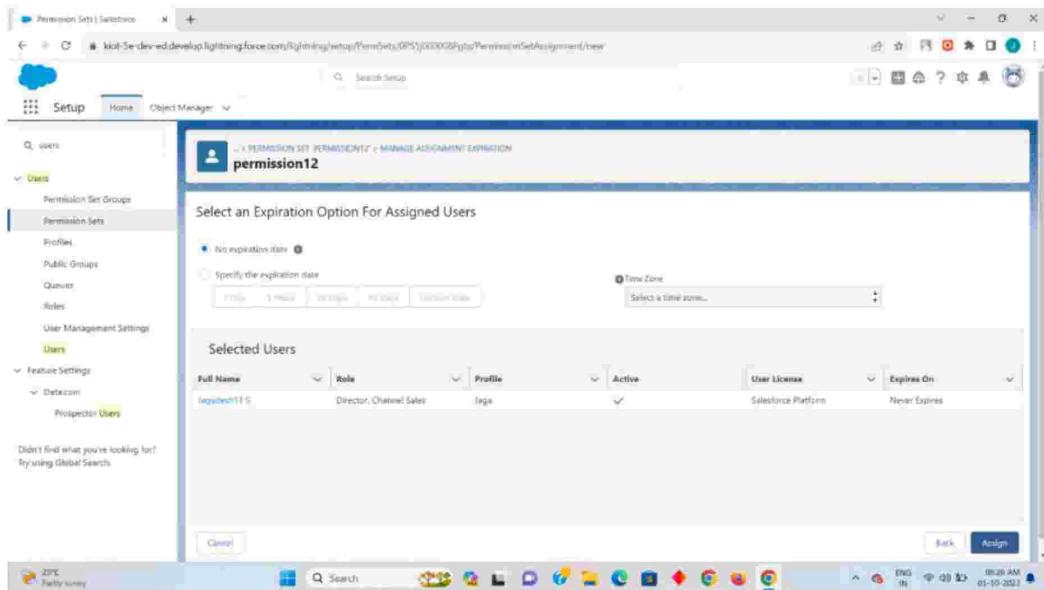
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.

The screenshot shows the 'Permission Sets' section of the Salesforce Setup. On the left, the navigation pane is open with 'Users' selected under 'Permission Set Groups'. The main area displays the 'permission12' permission set with the heading 'Current Assignments'. It features a decorative illustration of a cactus and clouds. Below the illustration, a message says 'No assignments defined.' There is a 'Add Assignment' button at the top right of the list area.

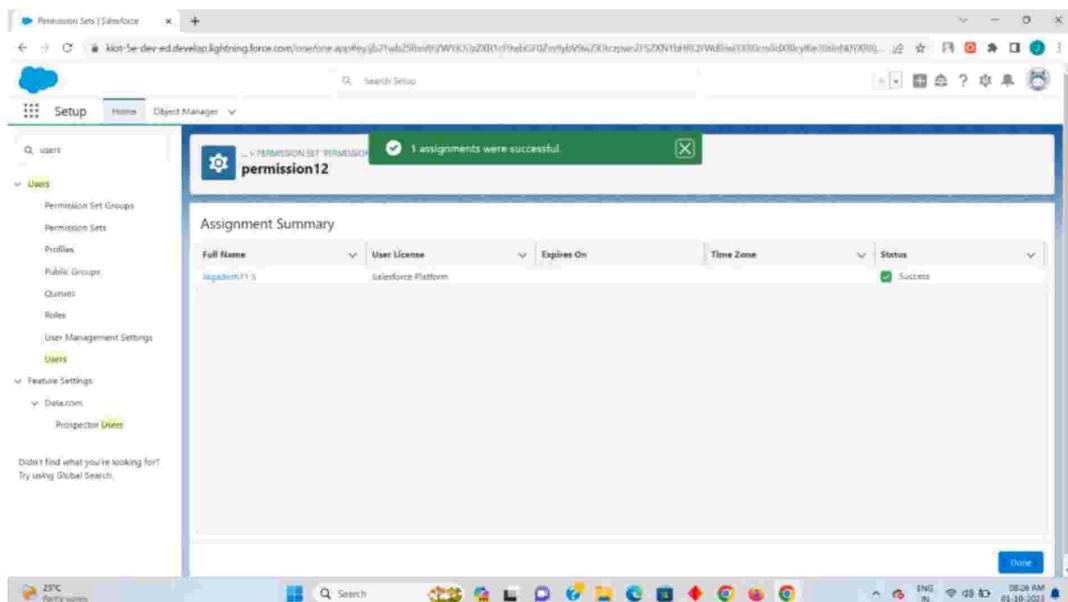
This screenshot shows the 'Select Users to Assign' dialog box. The title bar says 'PERMISSION SET: permission12 - MANAGE ASSIGNMENT EXPANSION'. The search bar contains 'jagadeesh'. The table lists four users: 'jagadeesh_3', 'jagadeesh_5', 'jagadeesh11_5', and 'jagadeesh22_5'. Each user has a checkbox next to their name, which is checked for 'jagadeesh_3' and 'jagadeesh11_5'. The 'Role' column shows 'SF Admin' for 'jagadeesh_3', 'Channel Sales Team' for 'jagadeesh_5', 'Director, Channel Sales' for 'jagadeesh11_5', and 'Marketing Team' for 'jagadeesh22_5'. The 'Profile' column shows 'System Administrator' for 'jagadeesh_3' and 'Standard Platform User' for 'jagadeesh_5'. A note at the top right of the table says 'Role, Alias, and Profile aren't assignable. Use Alias or start on these fields instead.'

This screenshot shows the same 'Select Users to Assign' dialog box, but now all four users ('jagadeesh_3', 'jagadeesh_5', 'jagadeesh11_5', and 'jagadeesh22_5') have their checkboxes checked. The rest of the interface remains the same, including the table headers and the note about roles and profiles.

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**.

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

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

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

The screenshot shows the 'Email Template' page in Salesforce. At the top, there's a header with the template name 'Thank You Email - Survey'. To the right of the header are three buttons: 'Edit in Builder', 'Edit', and 'Clone'. Below the header, there are two tabs: 'Details' (which is selected) and 'Related'. Under the 'Information' section, there are fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Related Entity Type' (set to 'Survey Result'), 'Description' (empty), and 'Folder' (set to 'Public Email Templates'). A checkbox labeled 'Made in Email Template Builder' is checked. In the 'Message Content' section, there are two tabs: 'Subject' (set to 'Thank You For Completing Our Survey!') and 'Enhanced Letterhead' (disabled). The 'HTML Value' tab contains the following content:

```
Hi {{Survey_Result__c.Name__c}},  
  
Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.  
  
Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.  
  
Thanks,  
Automation Champion
```

Under the 'Additional Information' section, it shows 'Created By' as 'Rakesh Gupta, 12/21/2020, 4:23 PM' and 'Last Modified By' as 'Rakesh Gupta, 12/21/2020, 4:32 PM'.

Step 3: Create an Email Alert

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

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

Edit Email Alert Help for this Page

Survey - Thank You Email

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit							
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>							
Edit Email Alert							
Description	<input type="text" value="Survey - Thank You Email"/>						
Unique Name	<input type="text" value="Survey_Thank_You_Email"/>						
Object	<input type="text" value="Survey Result"/>						
Email Template	<input type="text" value="Thank You Email - Survey"/>						
Protected Component	<input type="checkbox"/>						
Recipient Type <input type="text" value="User"/> <input type="button" value="Search"/> for: <input type="button" value="Find"/>							
Recipients <table border="1"> <thead> <tr> <th>Available Recipients</th> <th>Selected Recipients</th> </tr> </thead> <tbody> <tr> <td> User: Integration User User: Rakesh Gupta User: Security User </td> <td> Email Field: Email </td> </tr> <tr> <td style="text-align: center;"> <input type="button" value="Add"/> <input type="button" value="Remove"/> </td> <td></td> </tr> </tbody> </table>		Available Recipients	Selected Recipients	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email	<input type="button" value="Add"/> <input type="button" value="Remove"/>	
Available Recipients	Selected Recipients						
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email						
<input type="button" value="Add"/> <input type="button" value="Remove"/>							
<p>You can enter up to five (5) email addresses to be notified.</p> <p>Additional Emails</p> <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>							
From Email Address	<input type="text" value="Current User's email address"/>						
<input type="checkbox"/> Make this address the default From email address for this object's email alerts.							
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>							

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

- 1. Click Setup.**

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

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

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

- 2. Value: {!Comment}**
- 2. Click Add Row**
- 3. Row 2:**
 - 1. Field: Email__c**
 - 2. Value: {!Email.value}**
- 4. Click Add Row**
- 5. Row 3:**
 - 1. Field: Name__c**
 - 2. Value: {!Name.firstName}**
{!Name.lastName}
- 6. Click Add Row**
- 7. Row 3:**
 - 1. Field: Rating__c**
 - 2. Value: {!Rating}**
- 7. Click Done.**

Edit Create Records

Create Salesforce records using values from the flow.

* Label: 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"/> A_a Comment X
Email__c	<input type="text"/> A_a Email > Value X
Name__c	<input type="text"/> {!Name.firstName} {!Name.lastName}
Rating__c	<input type="text"/> A_a Rating X
+ Add Field	
<input type="checkbox"/> Manually assign variables	

[Cancel](#) [Done](#)

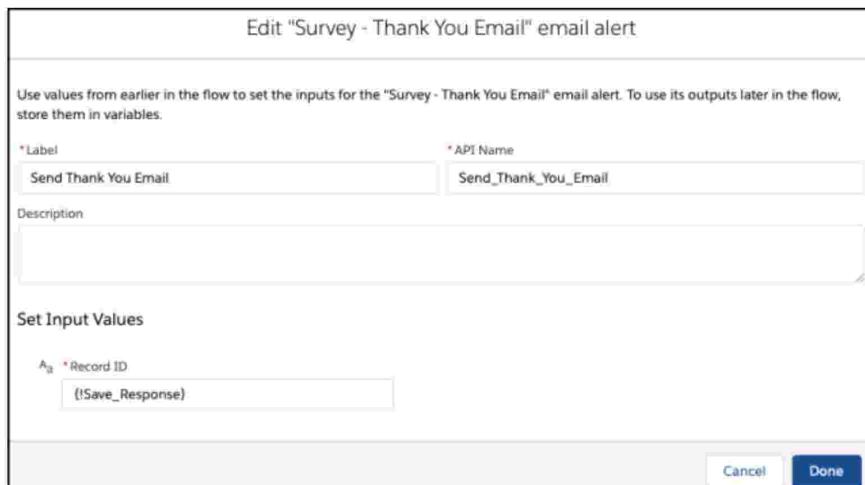
Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

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.

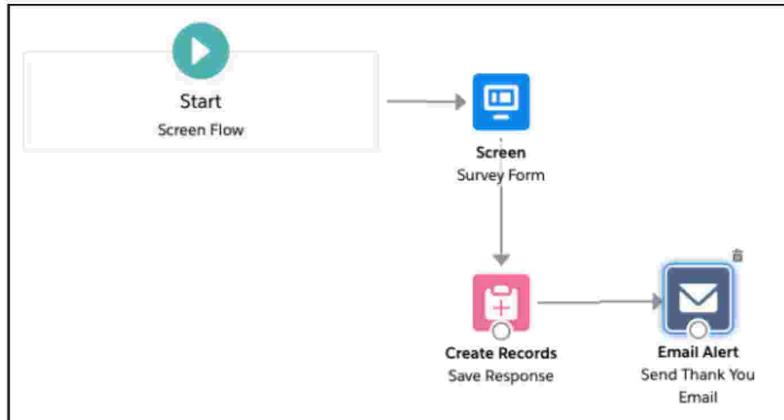
1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.

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

5. Click Done.



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



1. Click Save.

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

3. Click Show Advanced.

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

5. Type: Screen Flow

6. API Version for Running the Flow: 51

7. Interview Label: Survey

{!\$Flow.CurrentDateTime}

8. Click Save.

Save as

A New Version A New Flow

* Flow Label Survey * Flow API Name Survey

Description

Hide Advanced

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

* Type Screen Flow

* API Version for Running the Flow 51

Interview Label ⓘ

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

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

Status: Active Type: Screen Flow Version Number: 2

Cancel Save

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

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

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

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

The screenshot shows the Salesforce IDE interface. The top menu bar includes File, Edit, Debug, Test, Workspace, Help, and navigation icons. A tab labeled "VFPageToLC.app *" is selected. The main editor area contains the following code:

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

The code defines a Lightning Application component named "VFPageToLC.app". It specifies global access, extends the "ltng:outApp" base component, and implements the "ltng:allowGuestAccess" interface. It also declares a dependency on the "lightning:flow" component.

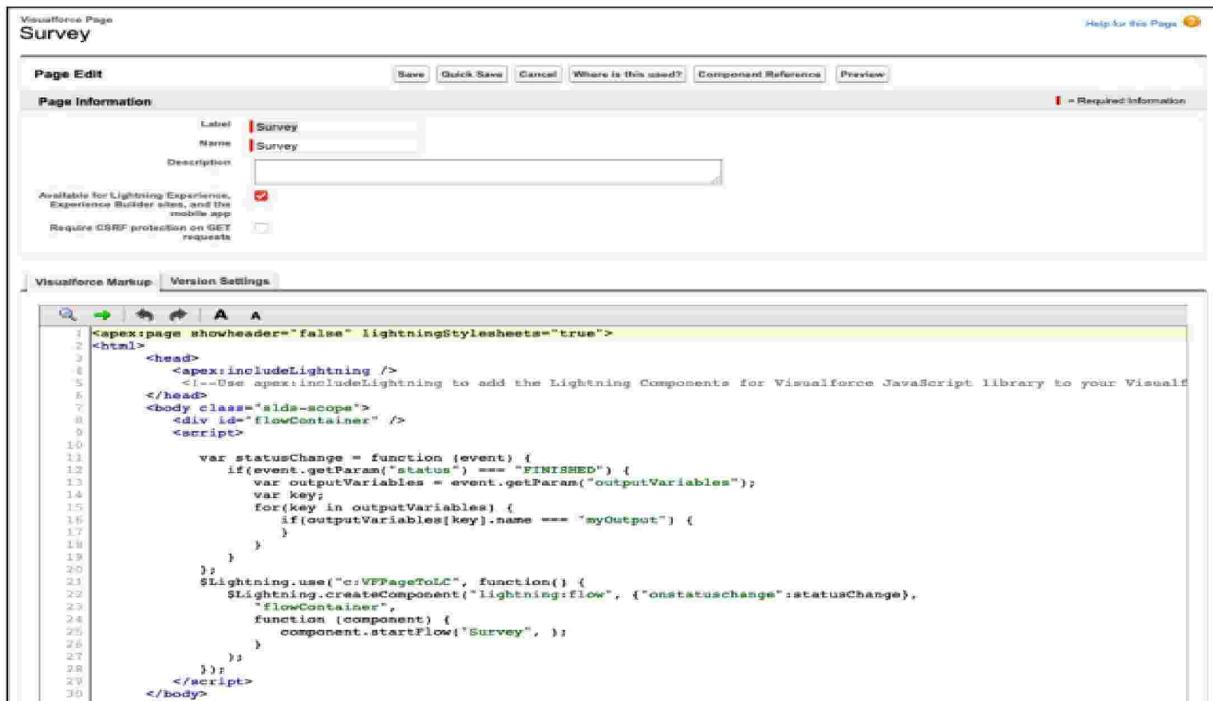
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

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

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

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



The screenshot shows the Salesforce Visualforce Page Editor. At the top, there's a header with tabs for 'Visualforce Page', 'Survey', 'Page Edit', 'Save', 'Quick Save', 'Cancel', 'Where is this used?', 'Component Reference', and 'Preview'. Below the header is a 'Page Information' section with fields for 'Label' (Survey), 'Name' (Survey), 'Description', and checkboxes for 'Available for Lightning Experience, Experience Builder sites, and the mobile app' and 'Require CSRF protection on GET requests'. The main area is divided into 'Visualforce Markup' and 'Version Settings' tabs. The 'Visualforce Markup' tab contains the following code:

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

```

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

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

1. Click **Setup**.

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

The screenshot shows the 'Site Edit' page in Salesforce. The 'Site Label' is set to 'Survey'. The 'Site Name' is also 'Survey'. The 'Site Description' field is empty. The 'Site Contact' and 'Default Record Owner' are both set to 'Rakesh Gupta'. The 'Default Web Address' is 'http://kathiara-developer-edition.gus.force.com/survey'. The 'Active' checkbox is checked. The 'Active Site Home Page' is set to 'Survey' and has a preview link. The 'Inactive Site Home Page' is set to 'InMaintenance' and has a preview link. The 'Site Template' is 'SiteTemplate'. The 'Site Robots.txt' and 'Site Favorite Icon' fields are empty. The 'Analytics Tracking Code' and 'URL Rewriter Class' fields are also empty. The 'Enable Feeds' checkbox is unchecked. The 'Clickjack Protection Level' is set to 'Allow framing by the same origin only (Recommended)'. The 'Require Secure Connections (HTTPS)' checkbox is checked. The 'Lightning Features for Guest Users' checkbox is checked. Under the 'Users' section, the 'Upgrade all requests to HTTPS' checkbox is checked. Under 'Protection', the 'Enable Content Sniffing Protection' and 'Enable Browser Cross Site Scripting Protection' checkboxes are checked. Under 'Scripting Protection', the 'Referrer URL Protection' checkbox is checked. Under the 'Payments API' section, the 'Guest Access to the Payments API' checkbox is unchecked. At the top right, there are 'Save' and 'Cancel' buttons.

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

Proof of Concept

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

Survey

Name

First Name
Alok

Last Name
Sinfal

*Email
[REDACTED]

*Rating
5

*Comment
Awesome Blog



Next

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

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

 Survey Site Guest User via b9amq6fe7rb-cdzwmma.gd0.bnc.salesforce.com
to me 

Hi Alok Sinfal,

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

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

Thanks,
Automation Champion