Naan Mudhalvan
Salesforce Developer(Course)
Assignment no 1

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Year & Dep : 4th year & CSE

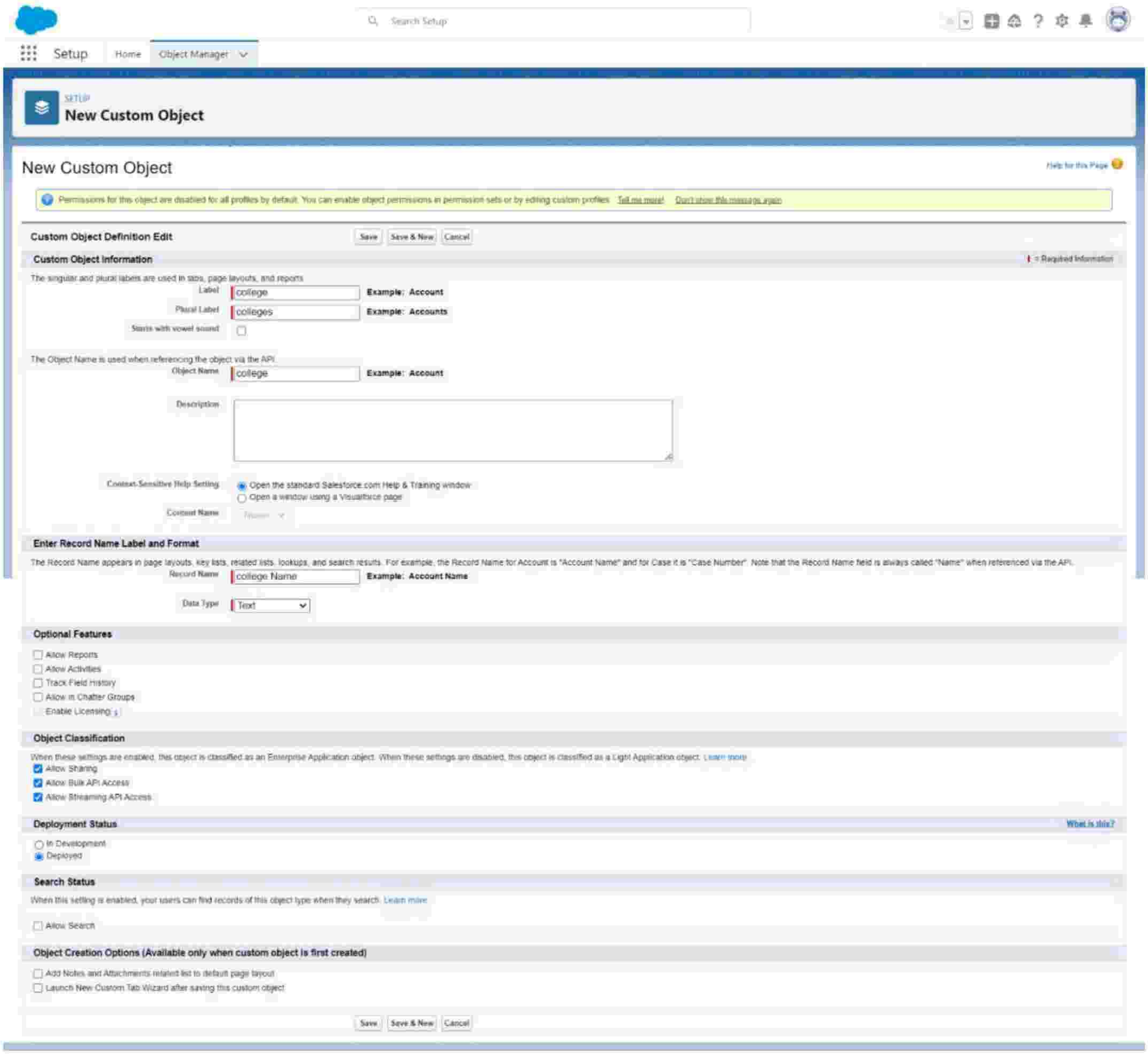
Batch : 2024

Zone no : Zone 8

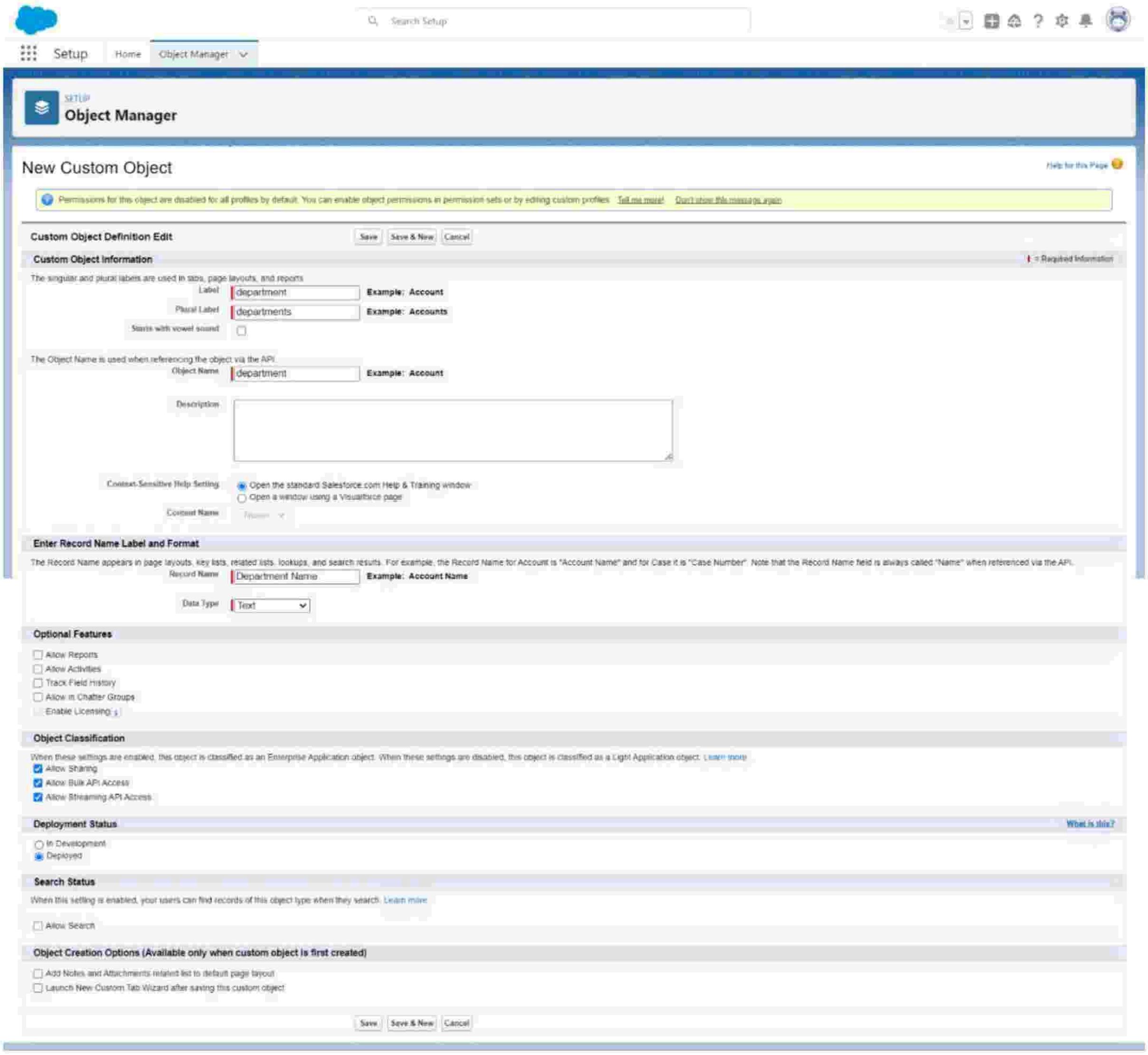
1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

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.



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



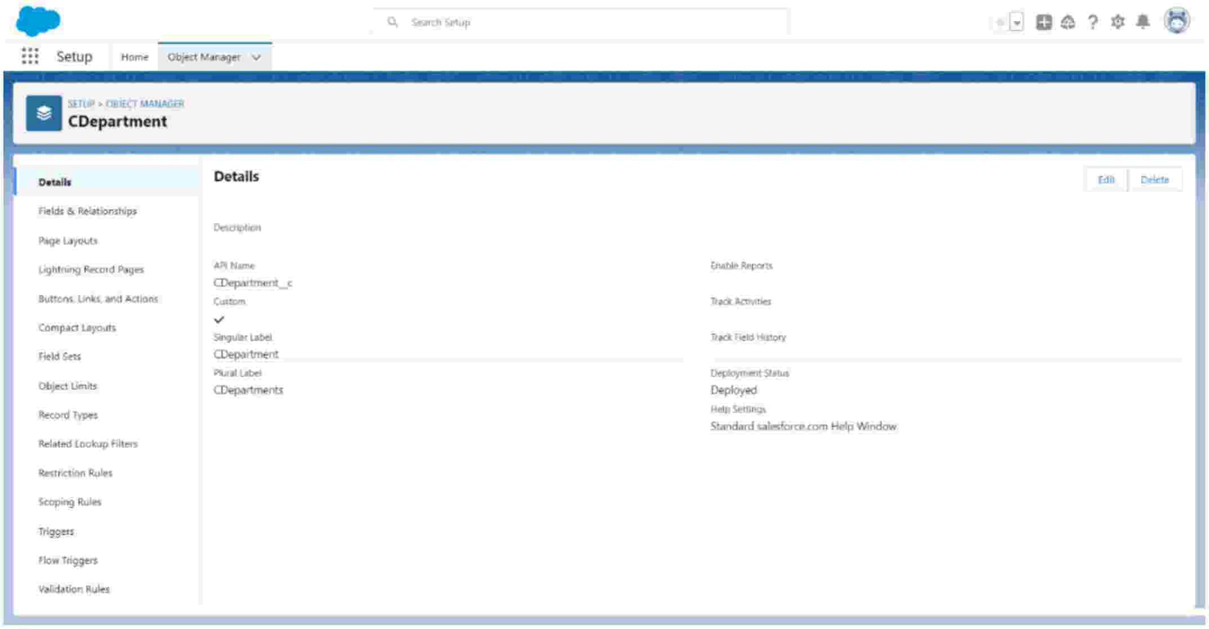
Step 2: Create a Master-Detail Relationship

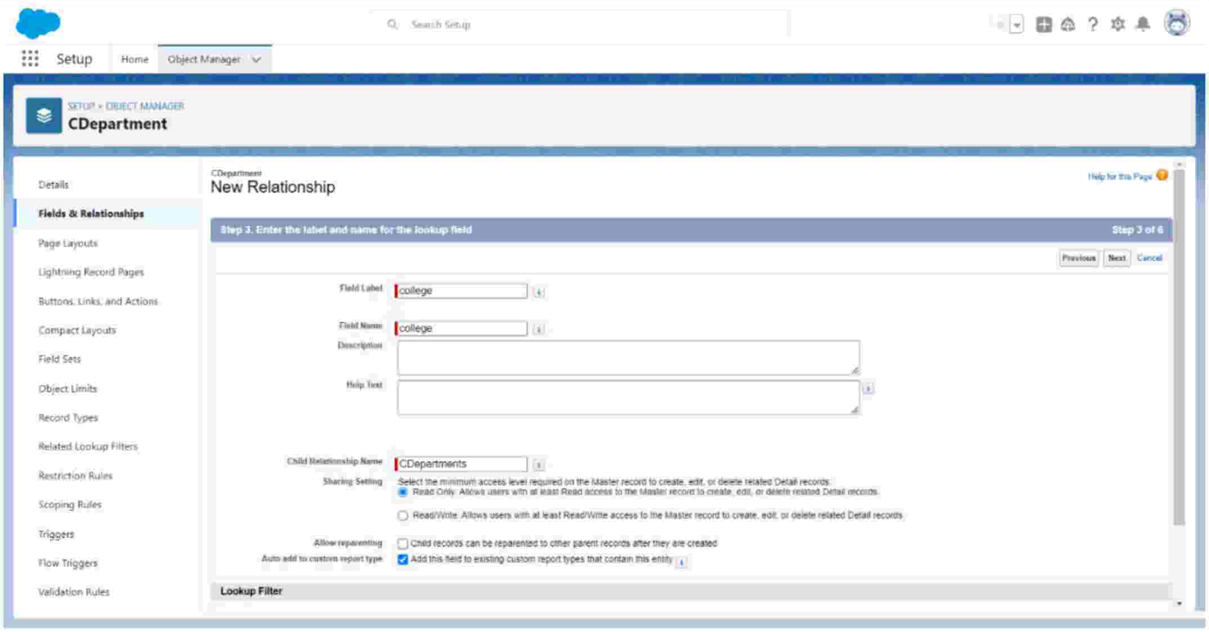
To create a Master-Detail relationship between these two custom objects, follow these steps:

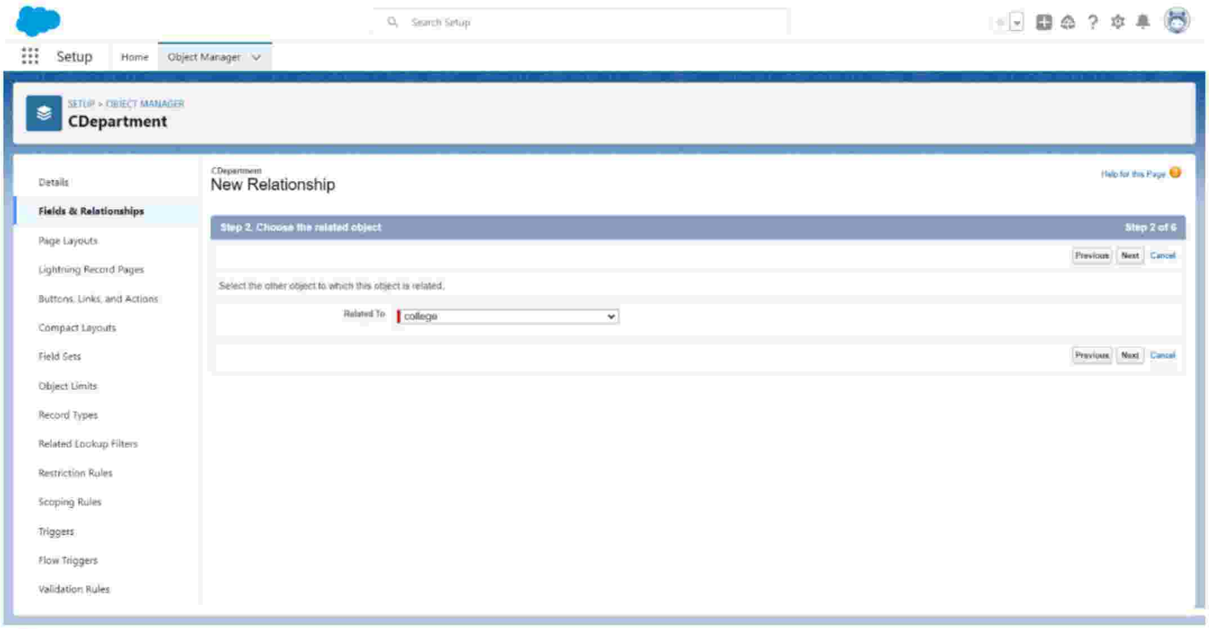
1. Go to Setup > Object Manager.
2. Click on "College__c" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."

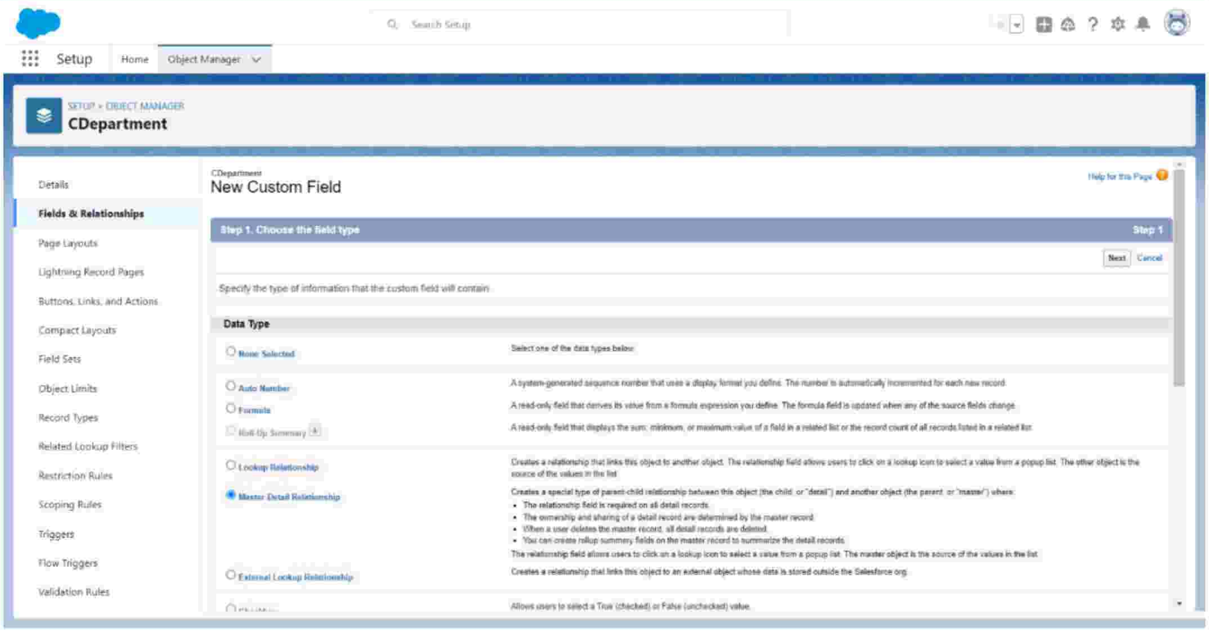
4. Click the "New" button to create a new custom field.
5. Choose "Master-Detail Relationship" as the data type.
6. Enter a label for the relationship, e.g., "Department __c."
7. Choose " Department__c" as the related object.
8. Configure other settings as needed and click "Next."
9. Specify the field-level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

10. Click "Next" and "Save" to create the relationship.


Search Setup
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
Details
Edit
Delete
Description
API Name
CDepartment__c
Custom
Singular Label
CDepartment
Plural Label
CDepartments
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window


Search Setup
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
CDepartment
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
college
Field Name
college
Description
Help Text
Child Relationship Name
CDepartments
Sharing Setting
Select the minimum access level required on the Master record to create, edit, or delete related Detail records.
Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting
Child records can be reparented to other parent records after they are created
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Lookup Filter





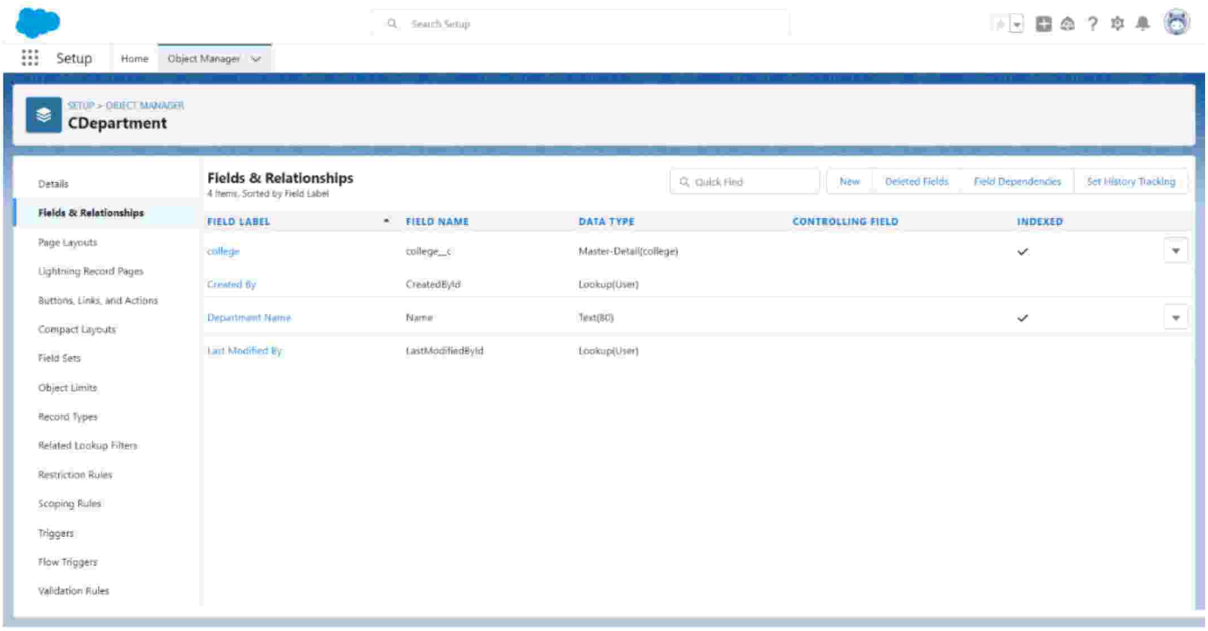
Step 3: Create the Roll-Up Summary Field

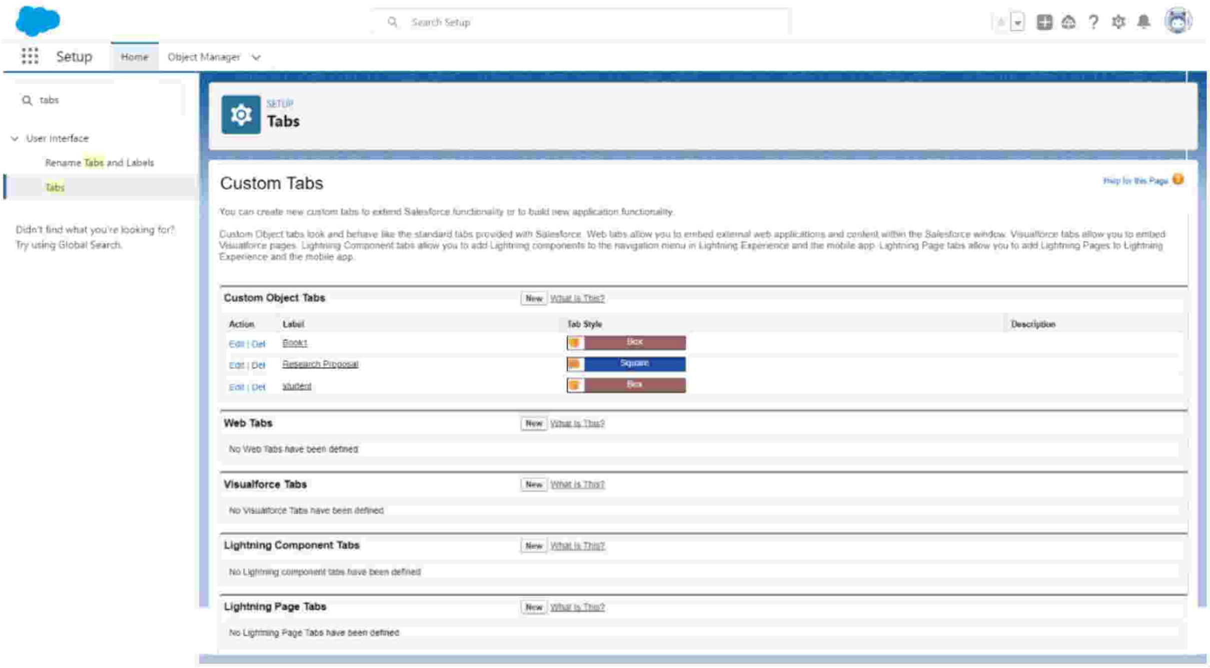
Now, let's create a Roll-Up Summary Field on the "College_C" to calculate the total number of related records in "Department__C":

1. **Still on the "College__c" settings, go to "Fields & Relationships."**

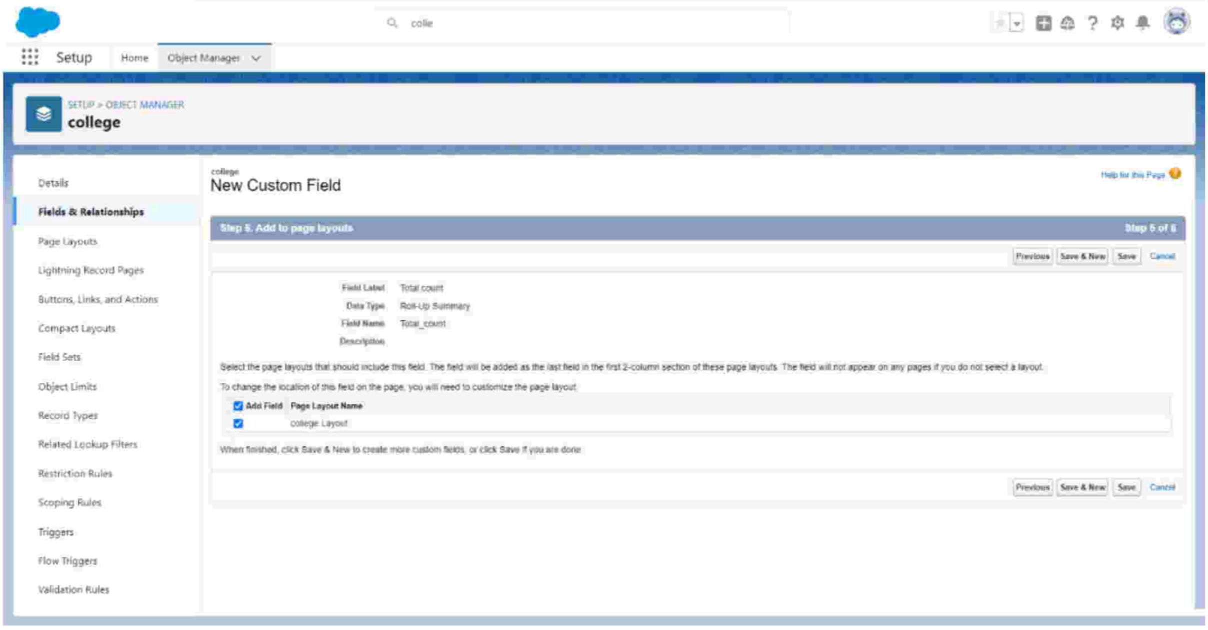
2. Click the "New" button to create a new custom field.
3. Choose "Roll-Up Summary" as the data type.
4. Enter a label for the field, e.g.,
5. Choose "Count" as the Roll-Up Type.
6. Select " Department__c" as the object to roll up information from.
7. Specify the filter criteria if you want to filter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

10. Click "Next" and "Save" to create the Roll-Up Summary Field.

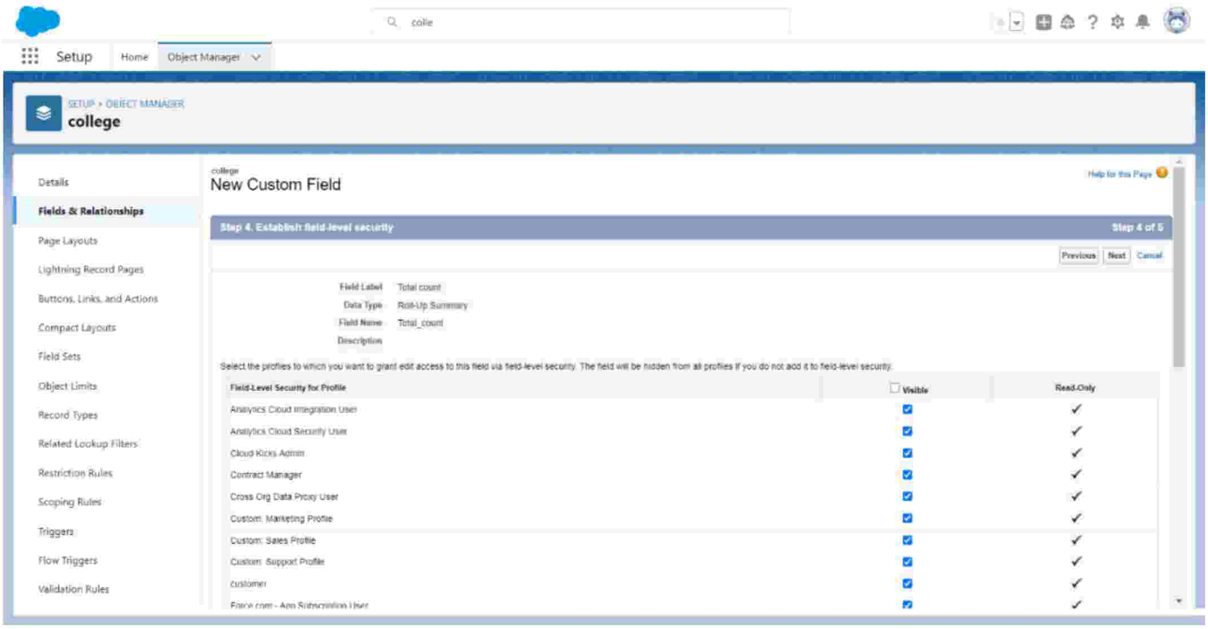


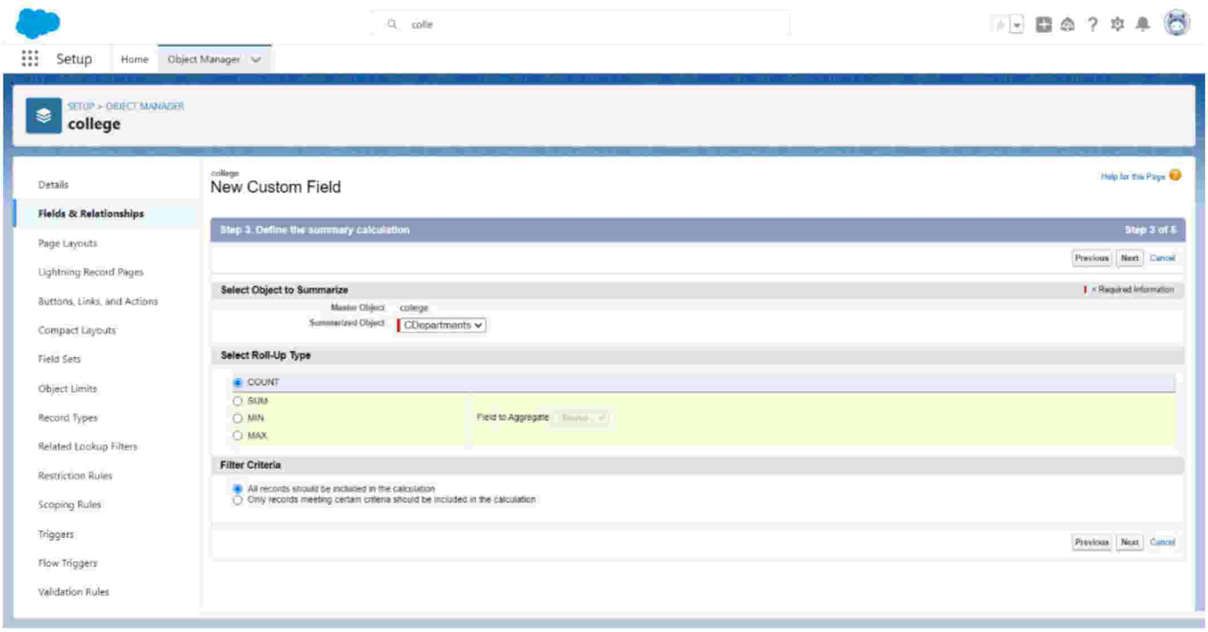


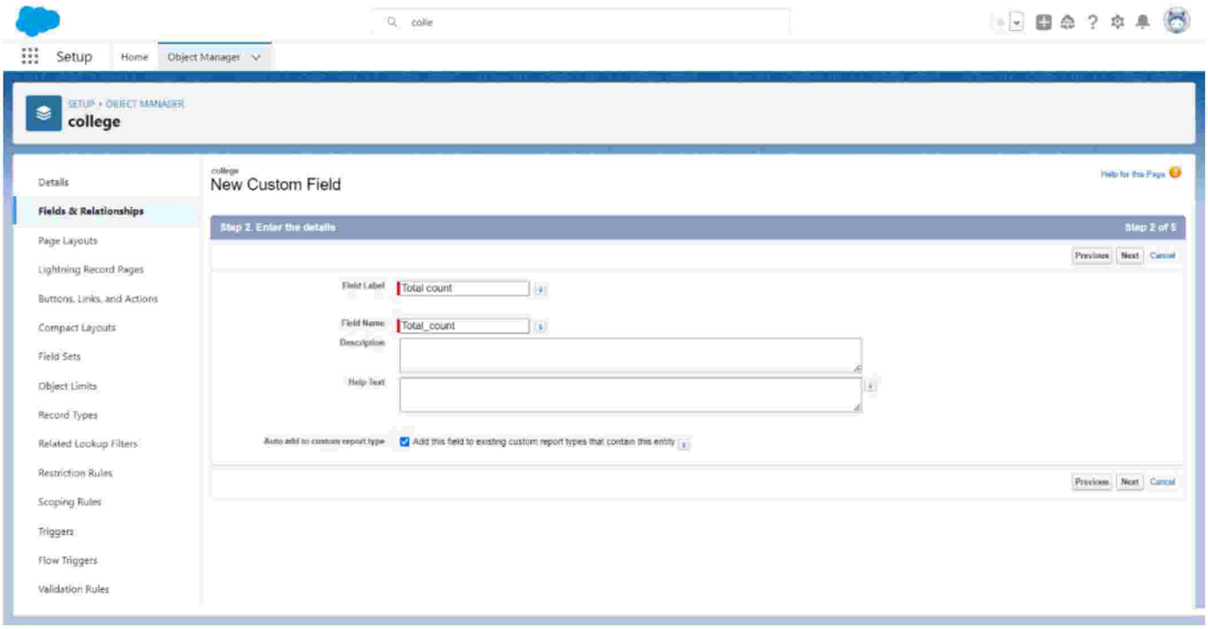
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
Book1
Box
Edit | Del
Research Proposal
Square
Edit | Del
student
Box
Web Tabs
No Web Tabs have been defined
Visualforce Tabs
No Visualforce Tabs have been defined
Lightning Component Tabs
No Lightning component tabs have been defined
Lightning Page Tabs
No Lightning Page Tabs have been defined

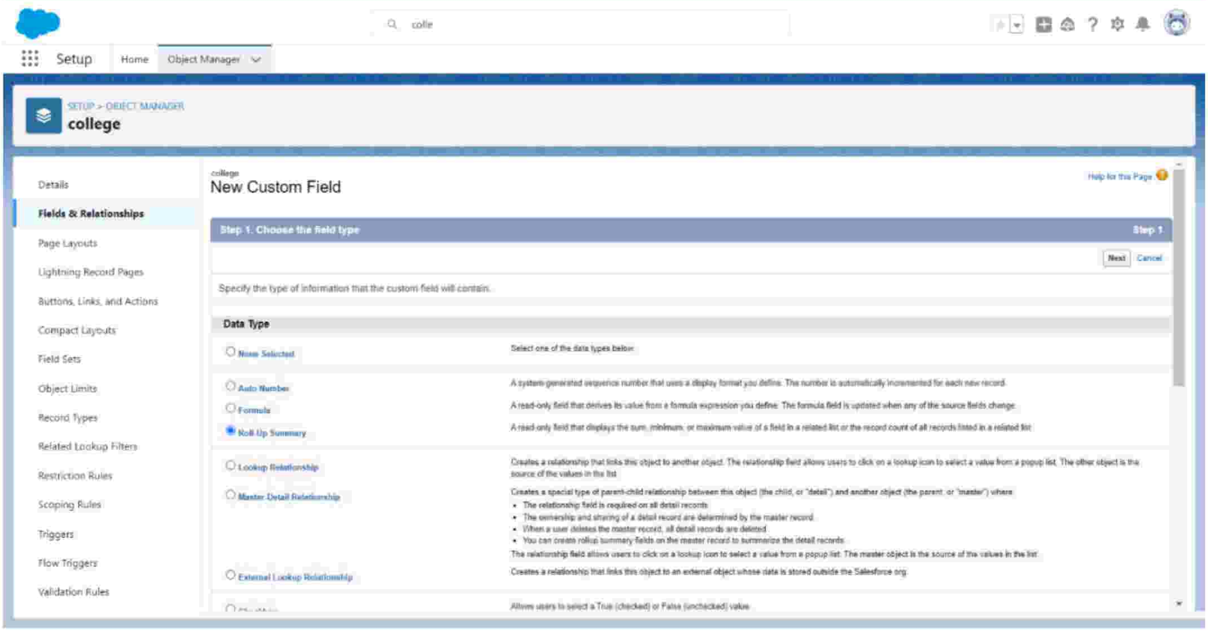


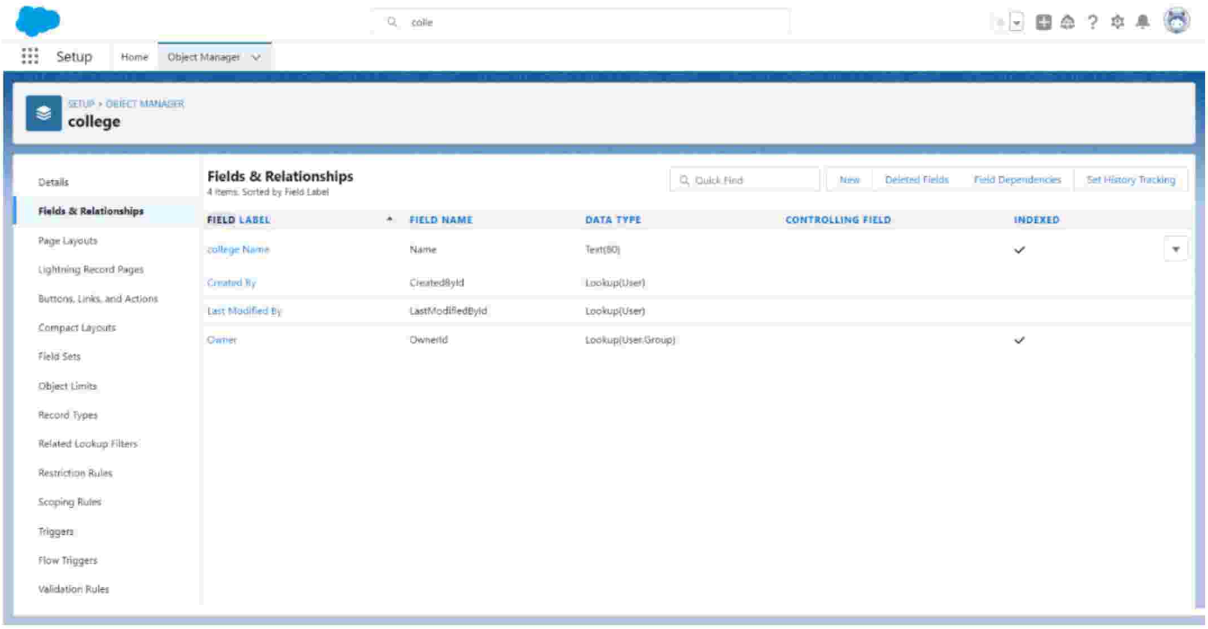
colle
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 5. Add to page layouts
Step 5 of 5
Previous
Save & New
Save
Cancel
Field Label
Total count
Data Type
Roll-Up Summary
Field Name
Total_count
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
college Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 4. Establish field-level security
Step 4 of 5
Previous
Next
Cancel
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
Analytics Cloud Security User
Cloud Kicks Admin
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
customer


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 3. Define the summary calculation
Step 3 of 5
Previous
Next
Cancel
Select Object to Summarize
= Required Information
Master Object college
Summarized Object CDepartments
Select Roll-Up Type
COUNT
SUM
MIN
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
Previous
Next
Cancel


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 5
Previous
Next
Cancel
Field Label
Total count
Field Name
Total_count
Description
Help Text
Auto add to custom report type
Add this field to existing custom report types that contain this entity


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
Formula
Roll-Up Summary
Lookup Relationship
Master-Detail Relationship
External Lookup Relationship

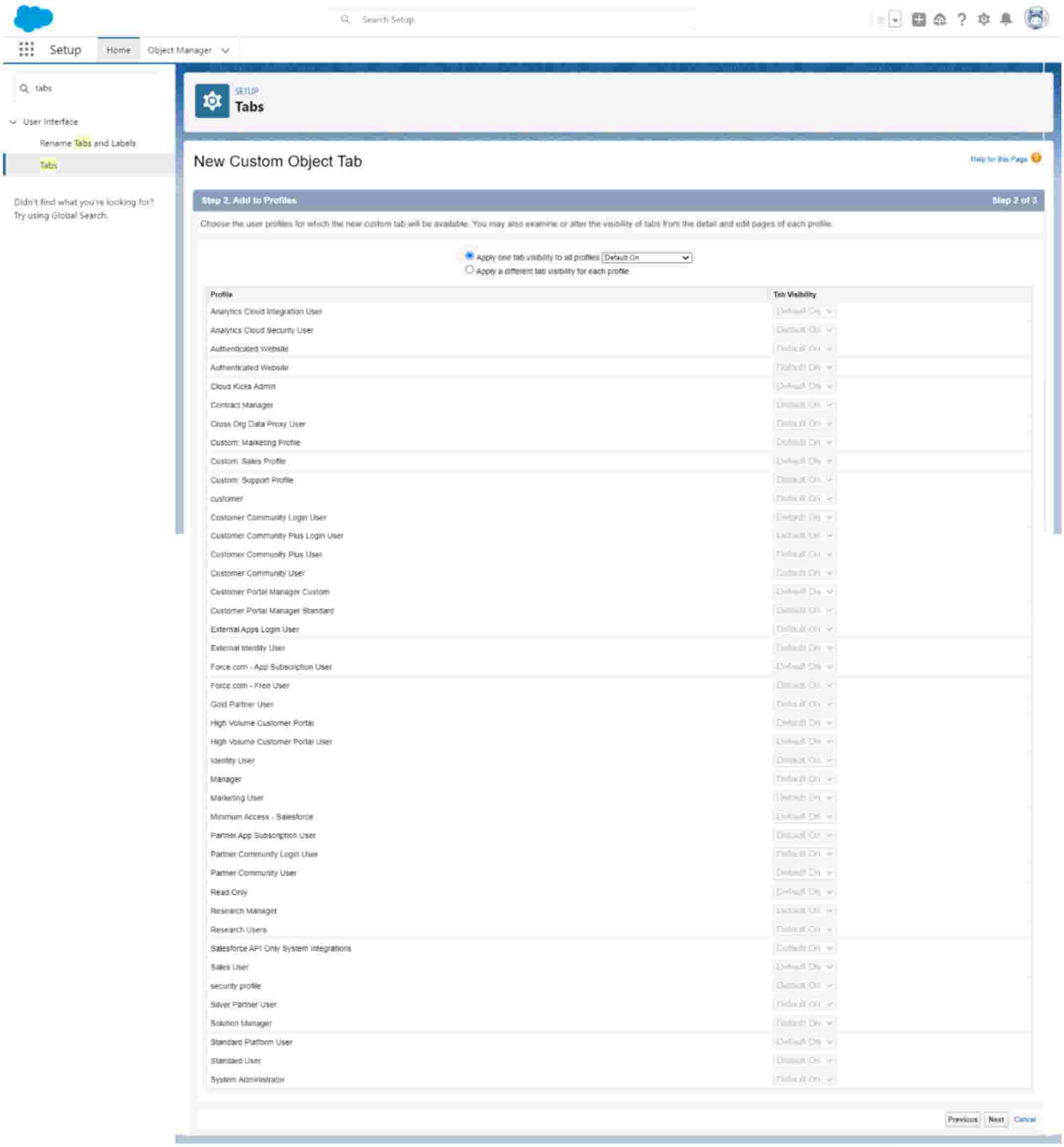


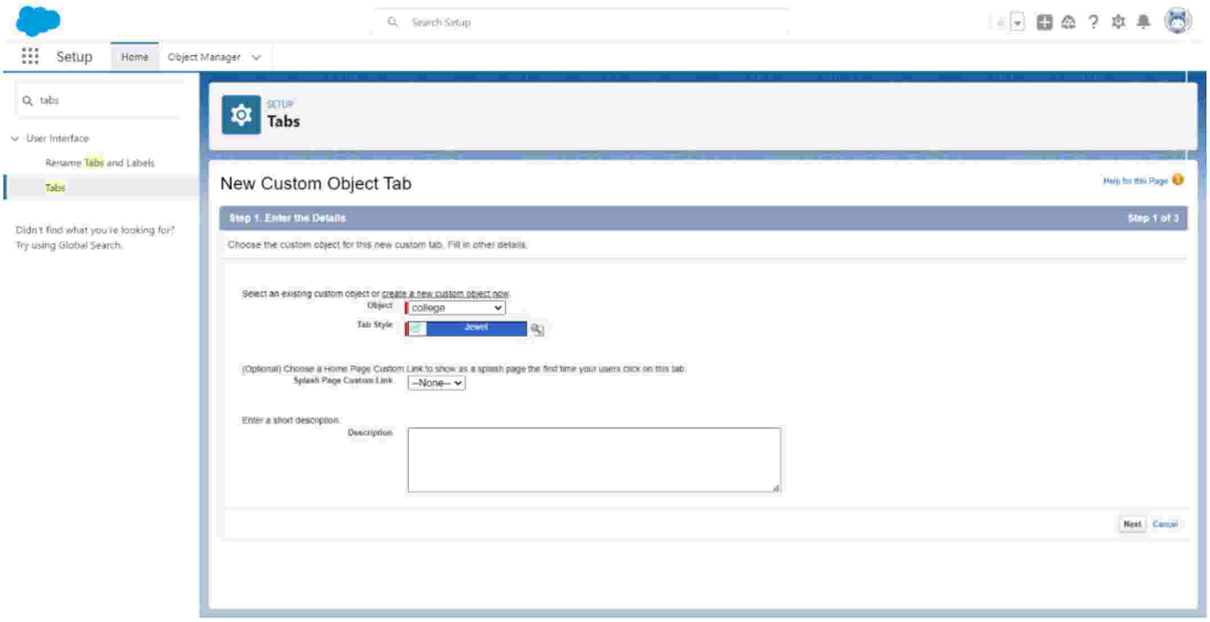
Step 4: Create a Lightning App

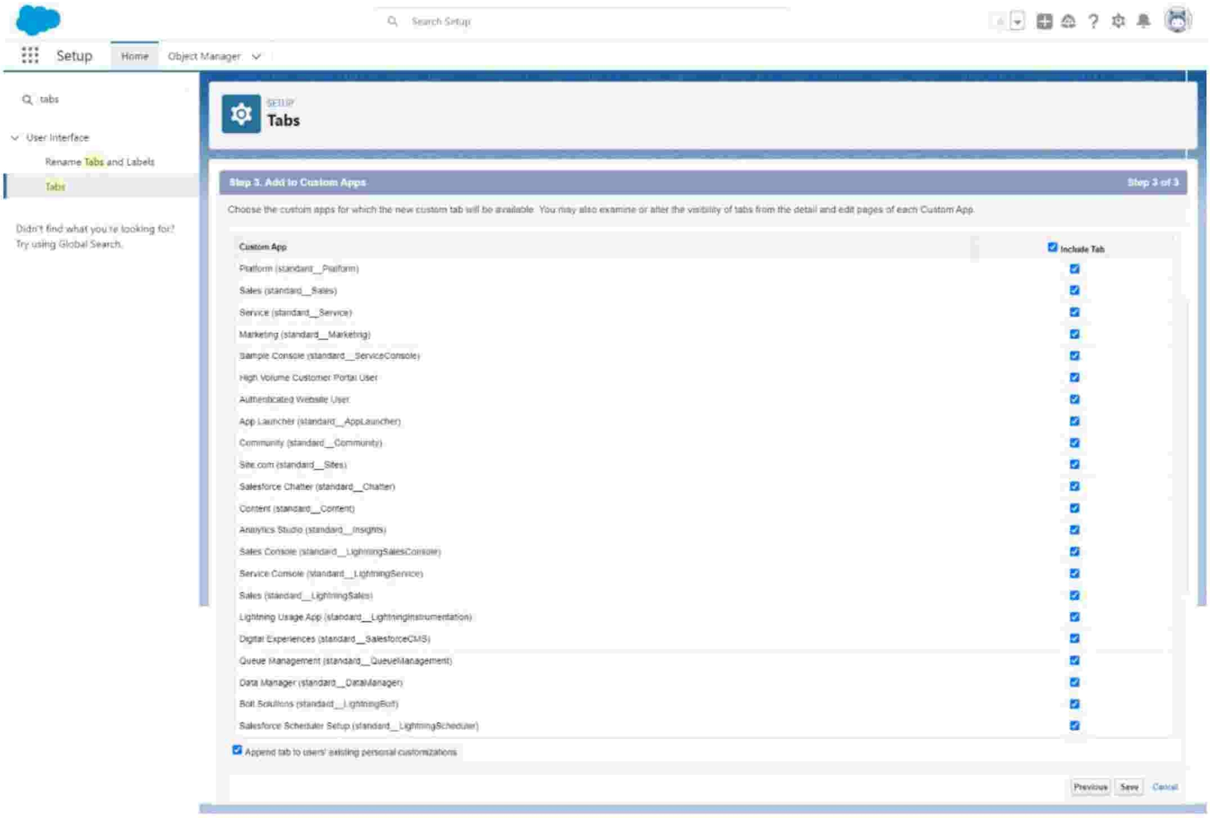
1. Type and select "App Manager."
2. Click "New Lightning App."
3. Fill in basic information (Name, Developer Name, Description).
4. Choose the App Type (Standard, Console, Custom).
5. Customize the Logo and Colour Scheme.
6. Configure Navigation Items (objects to appear in the app's menu).
7. Set the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

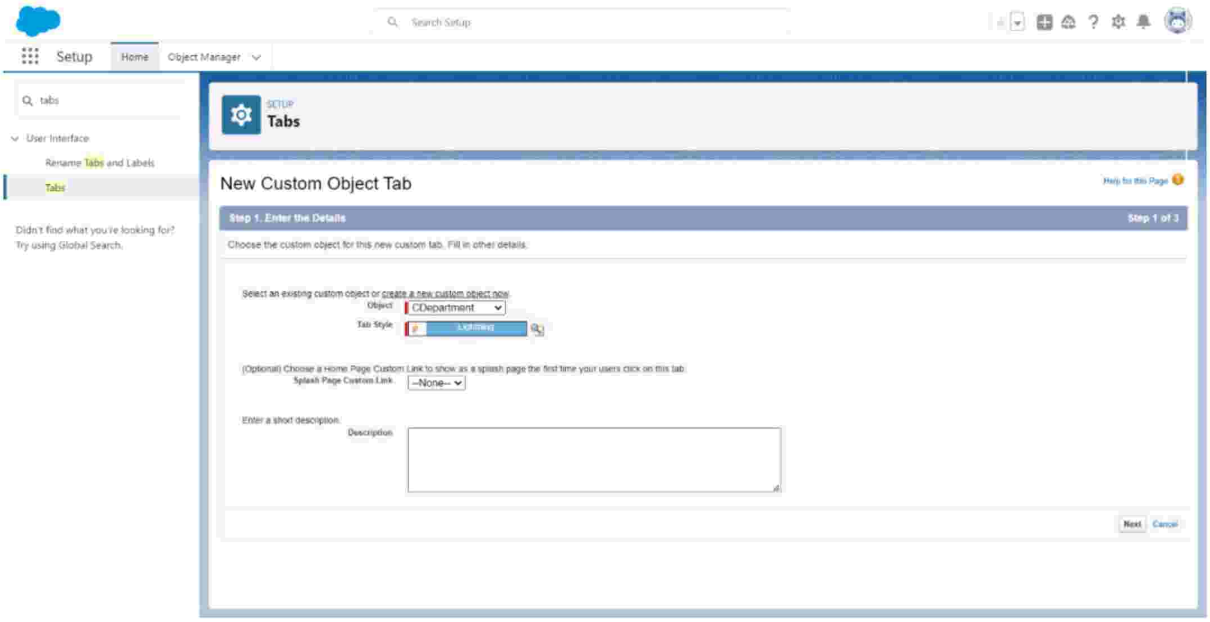
10.Assign the app to users or profiles.

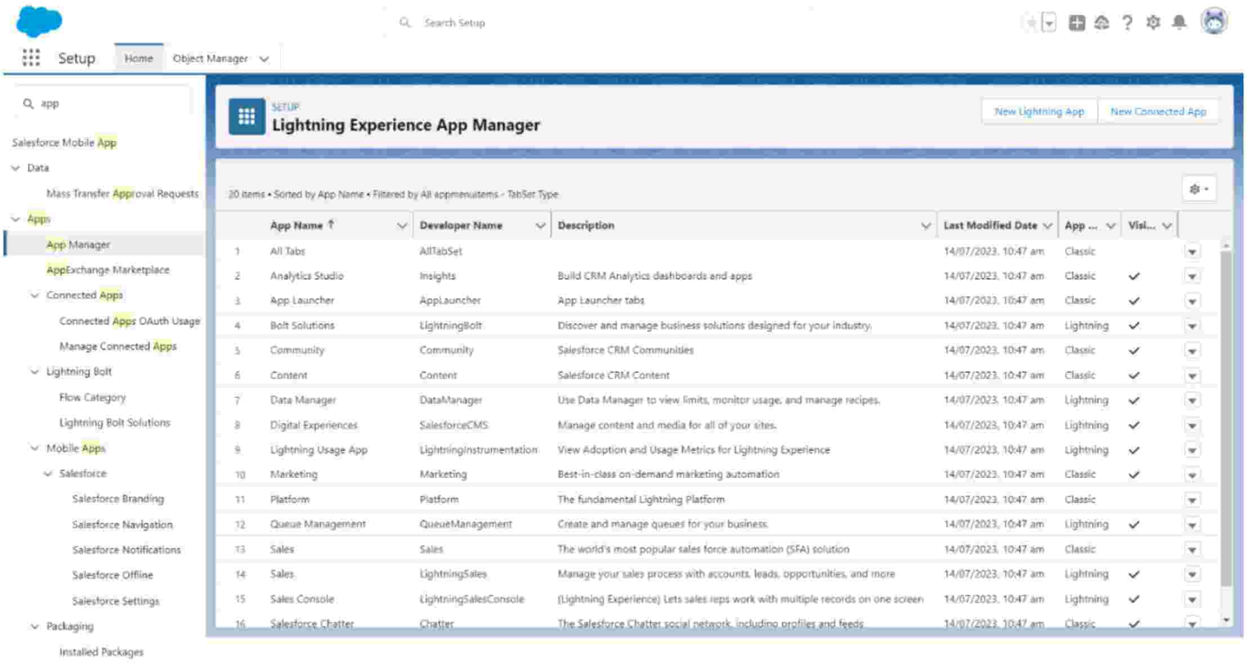
11.Test the app with the assigned users.

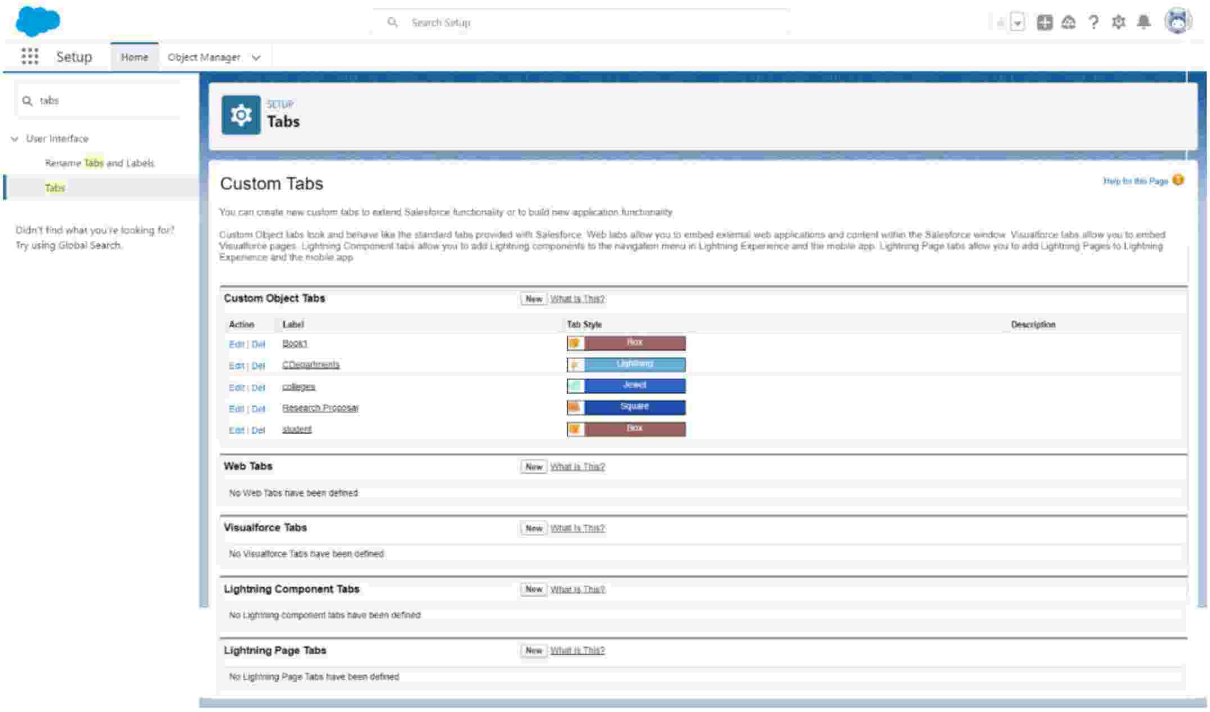


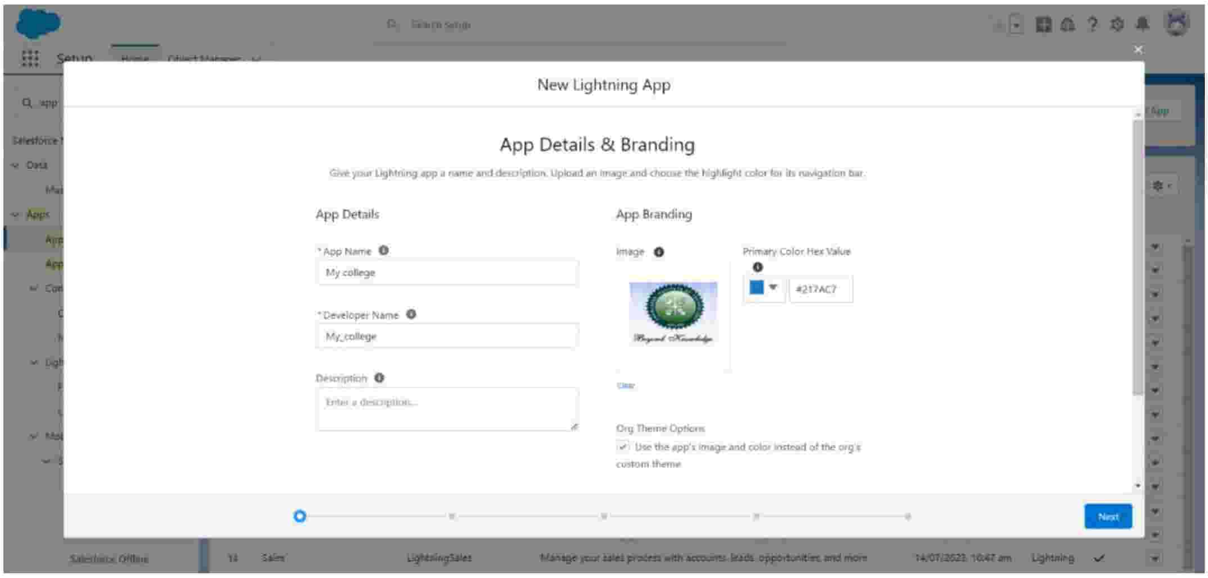

Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
college
Tab Style
Jewel
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel


Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
Sales Console (standard__LightningSalesConsole)
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Lightning Usage App (standard__LightningInstrumentation)
Digital Experiences (standard__SalesforceCMS)
Queue Management (standard__QueueManagement)
Data Manager (standard__DataManager)
Bolt Solutions (standard__LightningBolt)
Salesforce Scheduler Setup (standard__LightningScheduler)
Append tab to users' existing personal customizations
Previous
Save
Cancel


Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
CDepartment
Tab Style
Lightning
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel


Search Setup
Setup
Home
Object Manager
app
Salesforce Mobile App
Data
Mass Transfer Approval Requests
Apps
App Manager
AppExchange Marketplace
Connected Apps
Connected Apps OAuth Usage
Manage Connected Apps
Lightning Bolt
Flow Category
Lightning Bolt Solutions
Mobile Apps
Salesforce
Salesforce Branding
Salesforce Navigation
Salesforce Notifications
Salesforce Offline
Salesforce Settings
Packaging
Installed Packages
SETUP
Lightning Experience App Manager
New Lightning App
New Connected App
20 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type
App Name
Developer Name
Description
Last Modified Date
App ...
Visi...
1 All Tabs AllTabSet 14/07/2023, 10:47 am Classic
2 Analytics Studio Insights Build CRM Analytics dashboards and apps 14/07/2023, 10:47 am Classic
3 App Launcher AppLauncher App Launcher tabs 14/07/2023, 10:47 am Classic
4 Bolt Solutions LightningBolt Discover and manage business solutions designed for your industry. 14/07/2023, 10:47 am Lightning
5 Community Community Salesforce CRM Communities 14/07/2023, 10:47 am Classic
6 Content Content Salesforce CRM Content 14/07/2023, 10:47 am Classic
7 Data Manager DataManager Use Data Manager to view limits, monitor usage, and manage recipes. 14/07/2023, 10:47 am Lightning
8 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 14/07/2023, 10:47 am Lightning
9 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 14/07/2023, 10:47 am Lightning
10 Marketing Marketing Best-in-class on-demand marketing automation 14/07/2023, 10:47 am Classic
11 Platform Platform The fundamental Lightning Platform 14/07/2023, 10:47 am Classic
12 Queue Management QueueManagement Create and manage queues for your business. 14/07/2023, 10:47 am Lightning
13 Sales Sales The world's most popular sales force automation (SFA) solution 14/07/2023, 10:47 am Classic
14 Sales LightningSales Manage your sales process with accounts, leads, opportunities, and more 14/07/2023, 10:47 am Lightning
15 Sales Console LightningSalesConsole (Lightning Experience) Lets sales reps work with multiple records on one screen 14/07/2023, 10:47 am Lightning
16 Salesforce Chatter Chatter The Salesforce Chatter social network, including profiles and feeds 14/07/2023, 10:47 am Classic

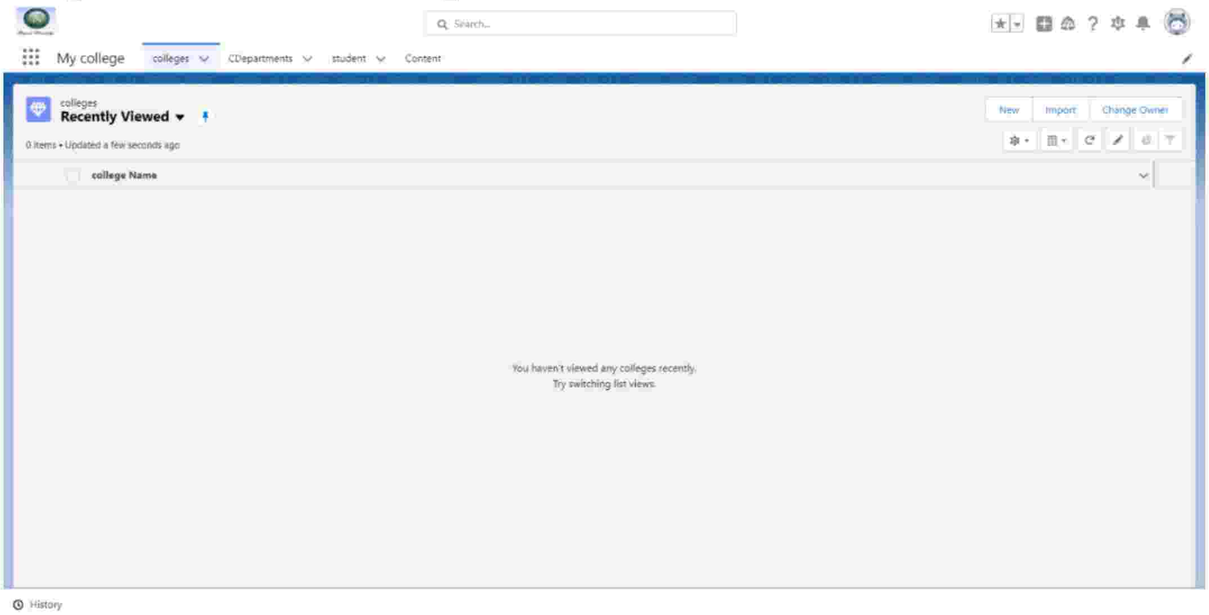

Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
Book1
Box
CDepartments
Lightning
colleges
Jewel
Research Proposal
Square
student
Box
Web Tabs
No Web Tabs have been defined
Visualforce Tabs
No Visualforce Tabs have been defined
Lightning Component Tabs
No Lightning component tabs have been defined
Lightning Page Tabs
No Lightning Page Tabs have been defined

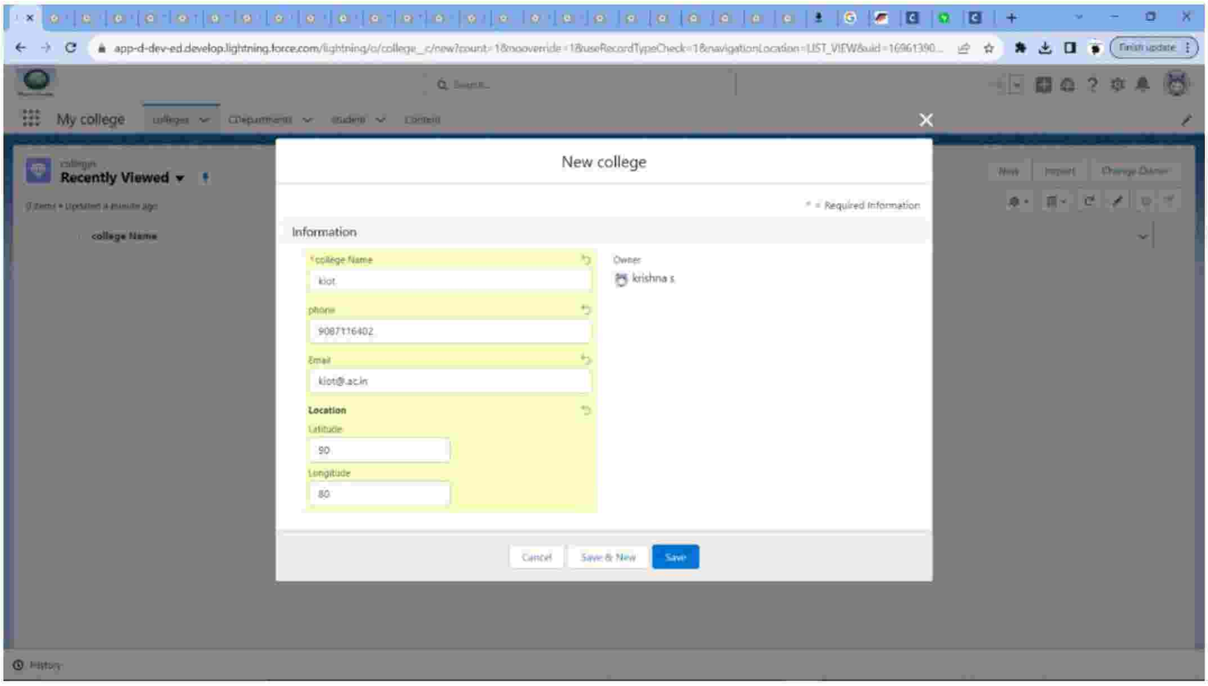

New Lightning App
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
* App Name
My college
* Developer Name
My_college
Description
Enter a description...
Image
Primary Color Hex Value
#217AC7
Clear
Org Theme Options
Use the app's image and color instead of the org's custom theme
Next

Conclusion:

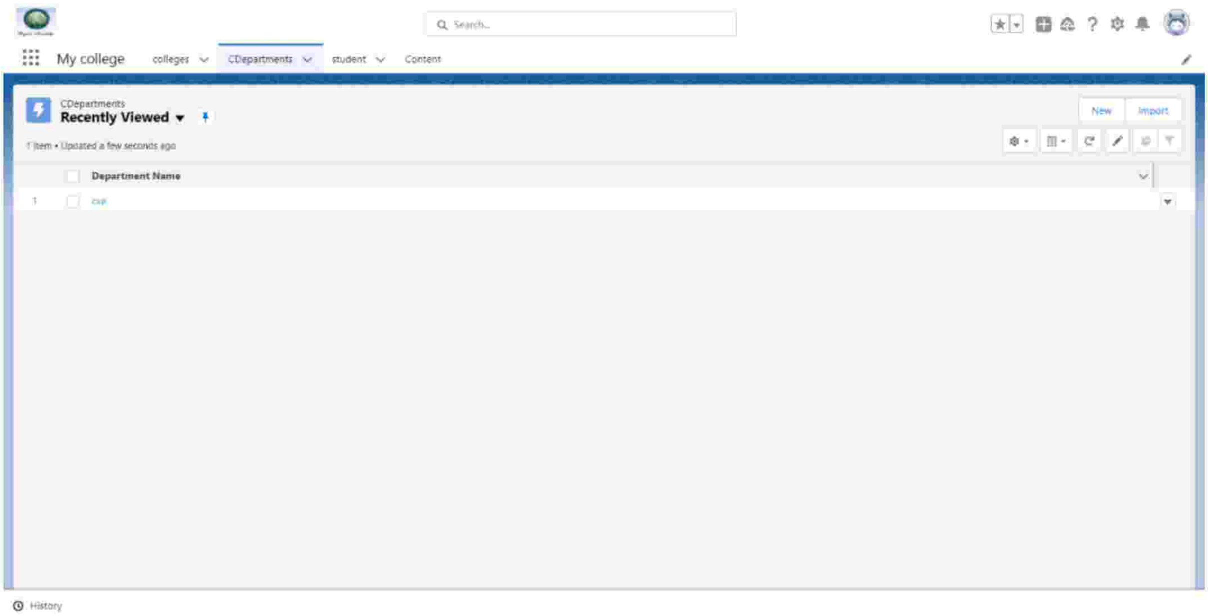
Now, whenever you create or update a record in the "Department__c" related to a "College__c," the "TotalCount__c" field on the "College__c" will automatically update to show the total number of related records.

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

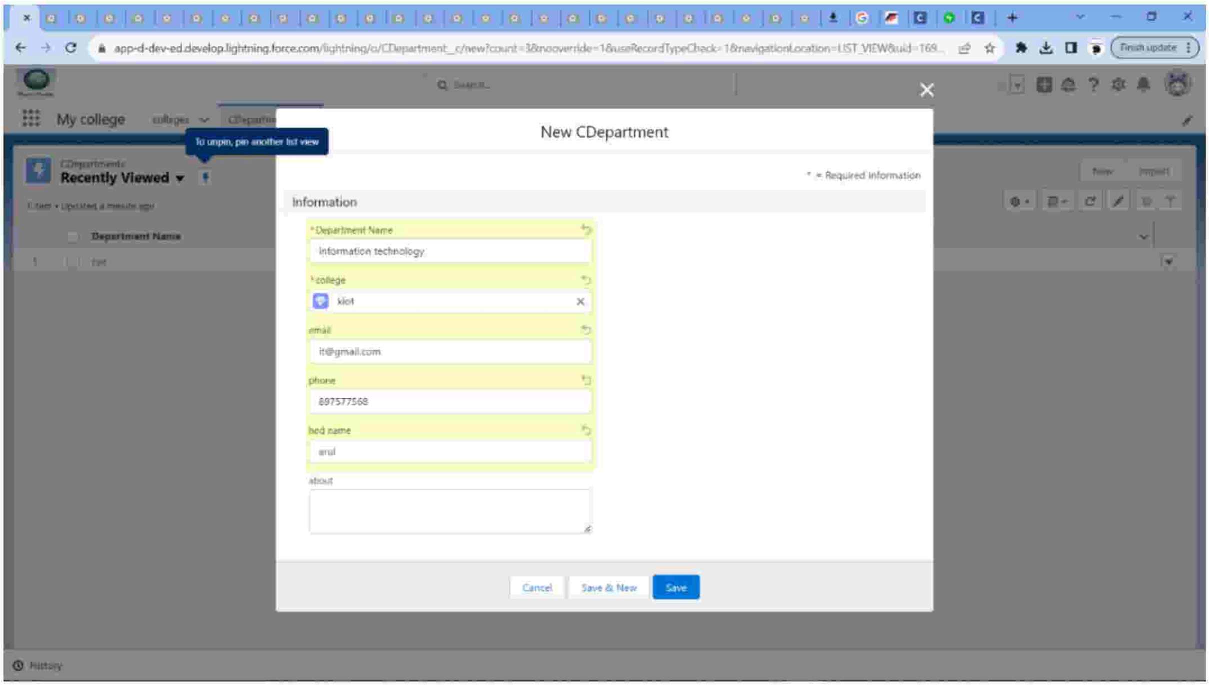




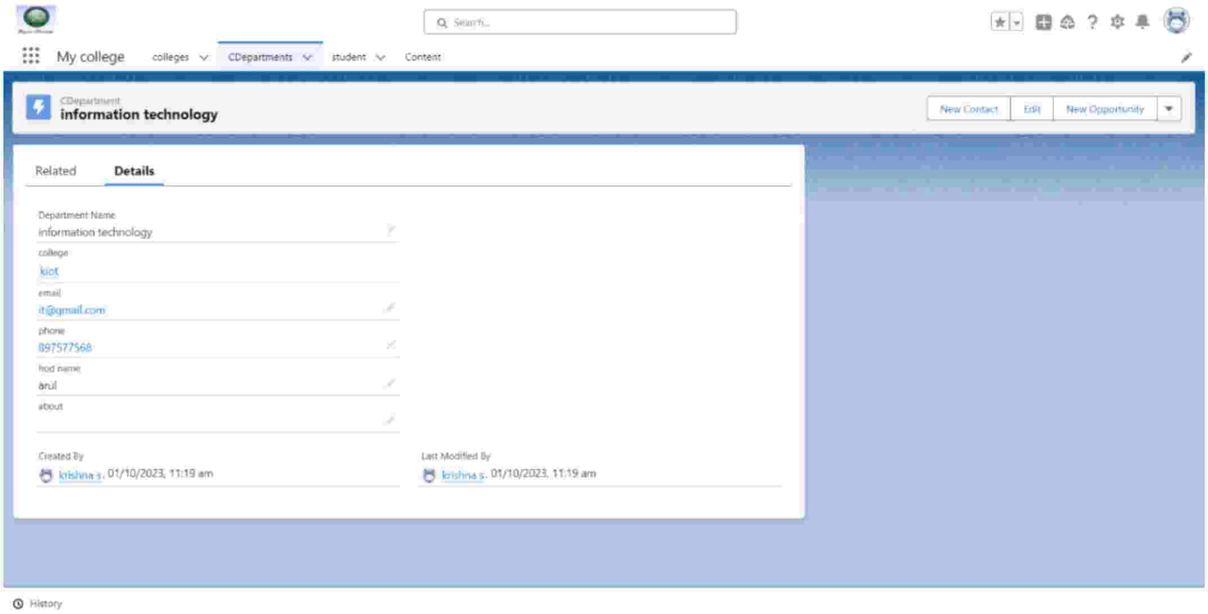
My college
colleges
CDepartments
student
Content
New college
* = Required Information
Information
* college Name
kiot
phone
9087116402
Email
kiot@.ac.in
Location
Latitude
90
Longitude
80
Owner
krishna s
Cancel
Save & New
Save

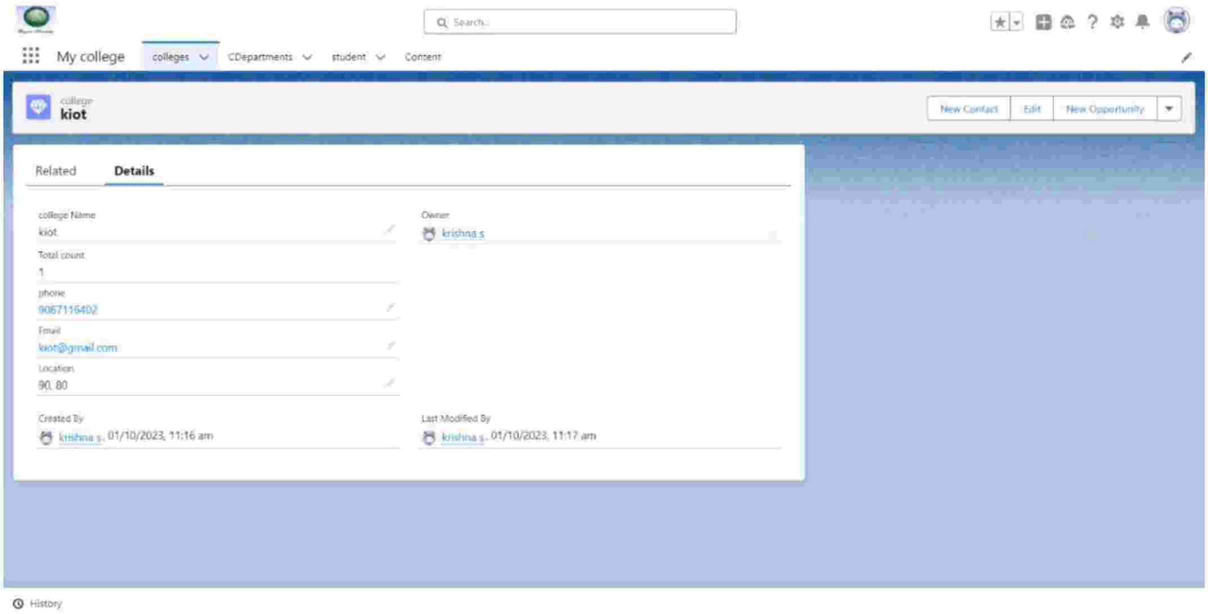


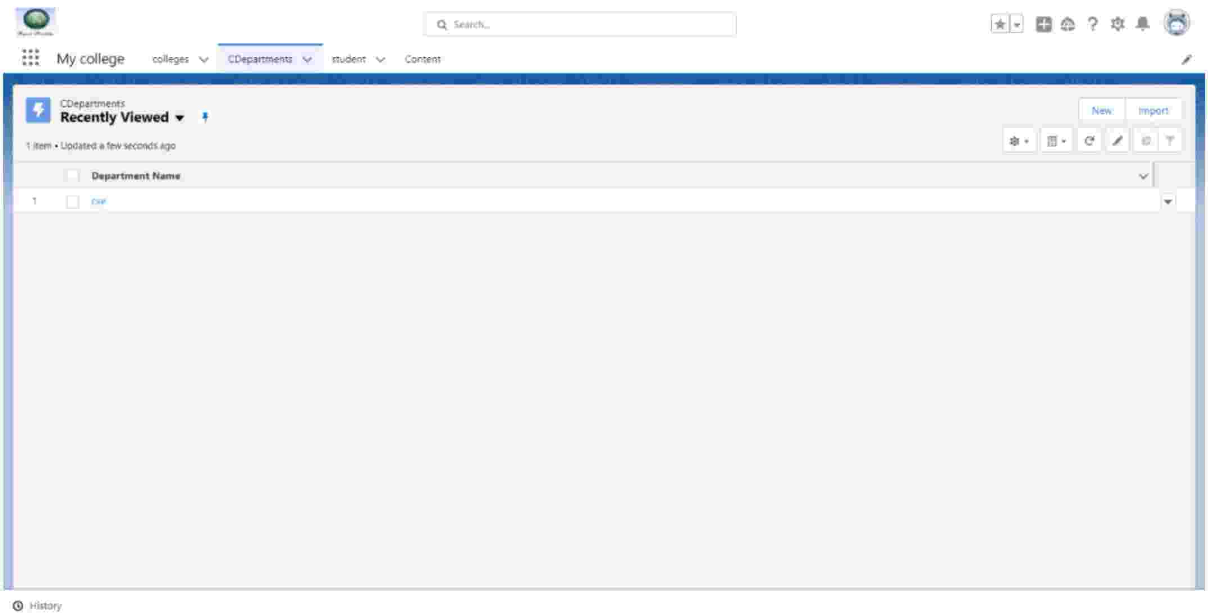
My college
colleges
CDepartments
student
Content
CDepartments
Recently Viewed
1 item • Updated a few seconds ago
New
Import
Department Name
History

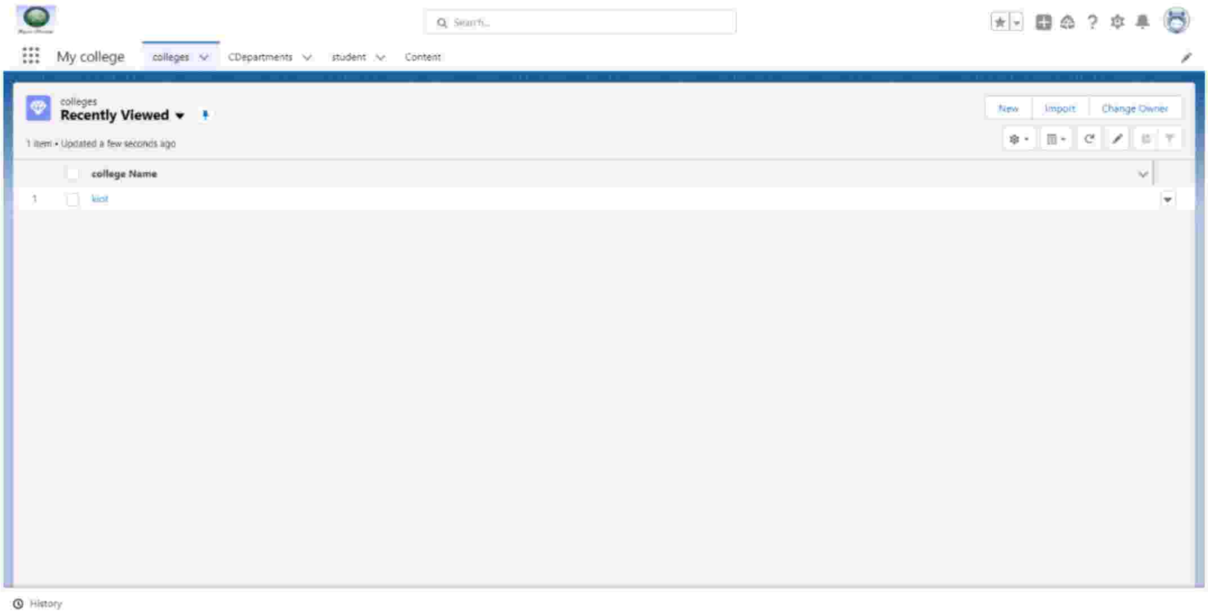


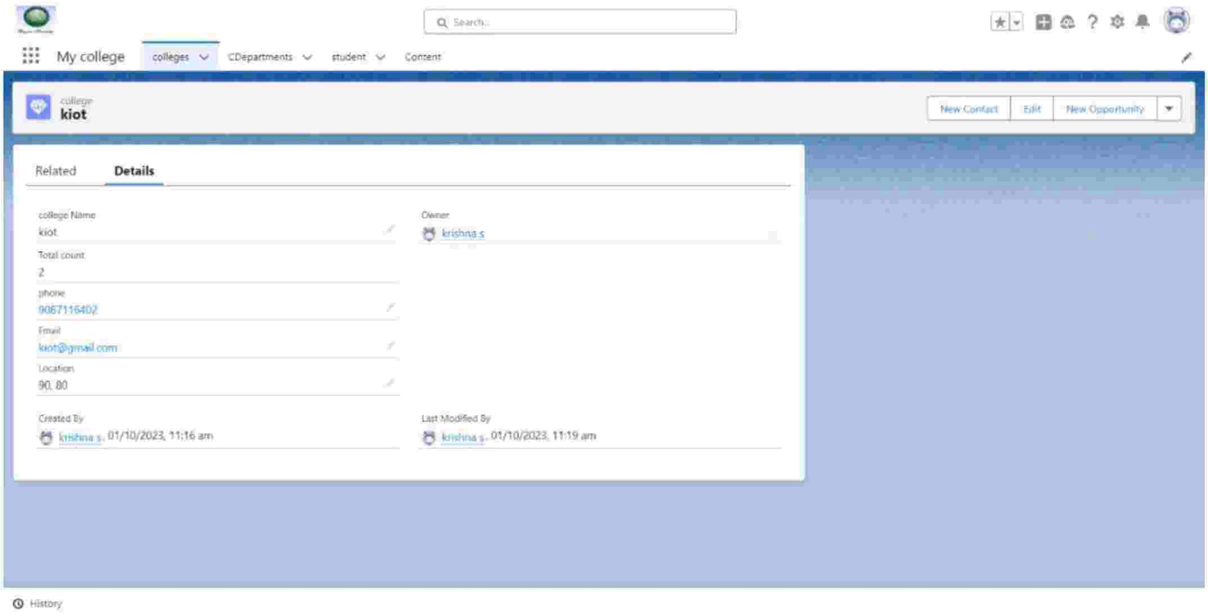
New CDepartment
* = Required information
Information
* Department Name
information technology
* college
kiot
email
it@gmail.com
phone
897577568
hod name
arul
about
Cancel
Save & New
Save


Search...
My college
colleges
CDepartments
student
Content
CDepartment
information technology
New Contact
Edit
New Opportunity
Related
Details
Department Name
information technology
college
kiot
email
it@gmail.com
phone
897577568
hod name
arul
about
Created By
krishna s, 01/10/2023, 11:19 am
Last Modified By
krishna s, 01/10/2023, 11:19 am
History


Search...
My college
colleges
CDepartments
student
Content
college
kiot
New Contact
Edit
New Opportunity
Related
Details
college Name
kiot
Owner
krishna s
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
History


Search...
My college
colleges
CDepartments
student
Content
CDepartments
Recently Viewed
New
Import
1 item • Updated a few seconds ago
Department Name
1
cse
History

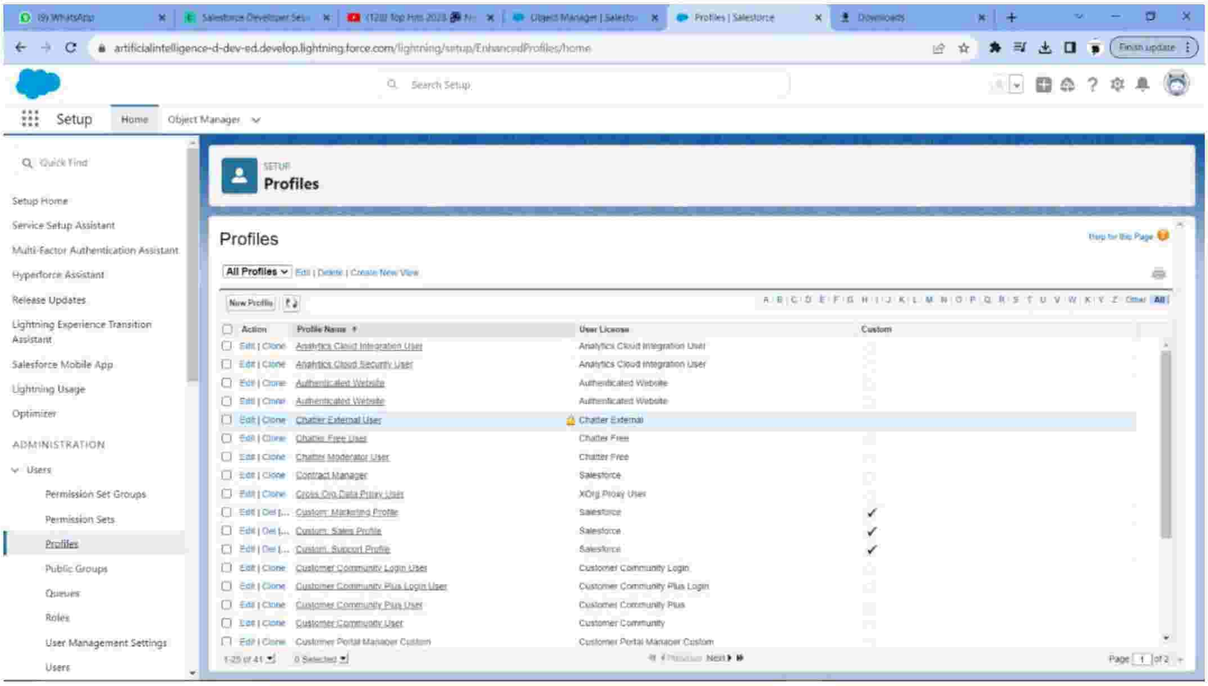

Search...
My college
colleges
CDepartments
student
Content
colleges
Recently Viewed
New
Import
Change Owner
1 item • Updated a few seconds ago
college Name
1
kiot
History

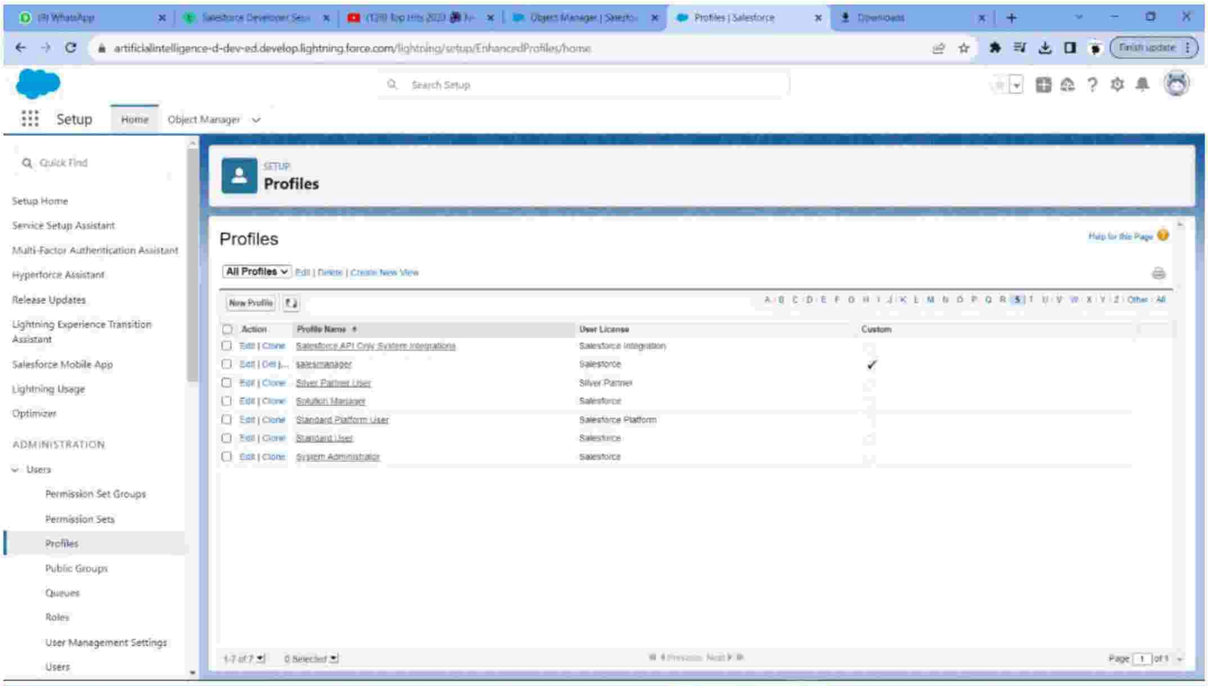

Search...
My college
colleges
CDepartments
student
Content
college
kiot
New Contact
Edit
New Opportunity
Related
Details
college Name
kiot
Owner
krishna s
Total count
2
phone
9067116402
Email
kiot@gmail.com
Location
90, 80
Created By
krishna s, 01/10/2023, 11:16 am
Last Modified By
krishna s, 01/10/2023, 11:19 am
History

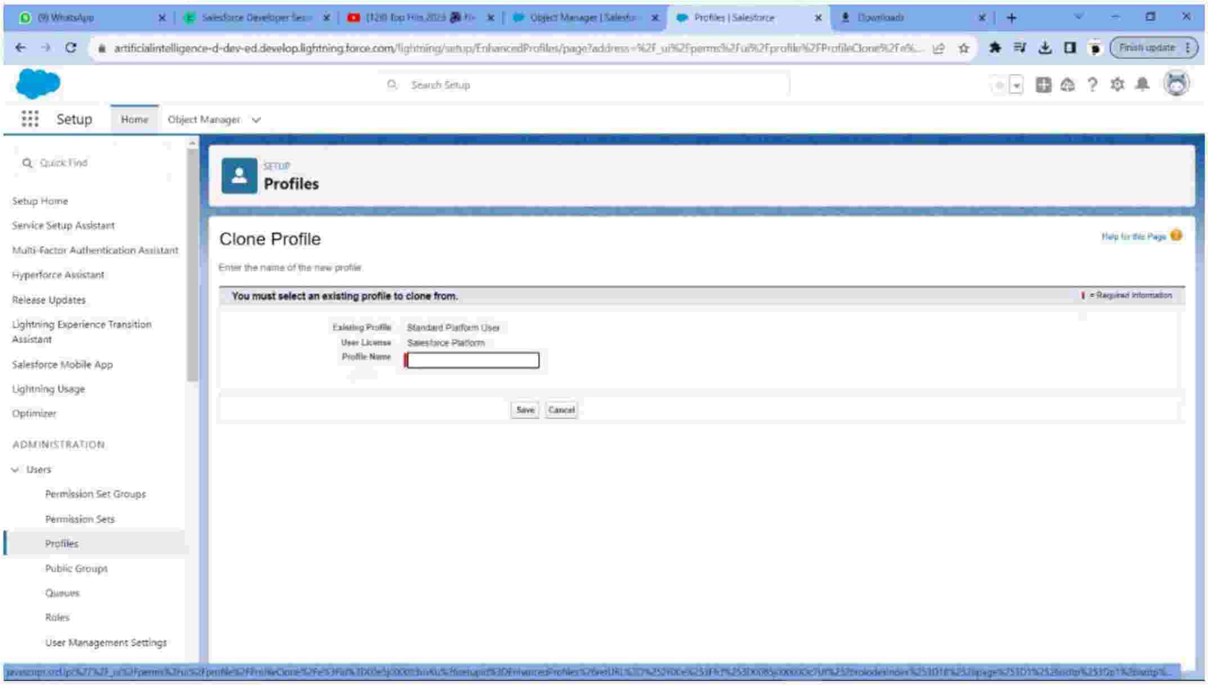
2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

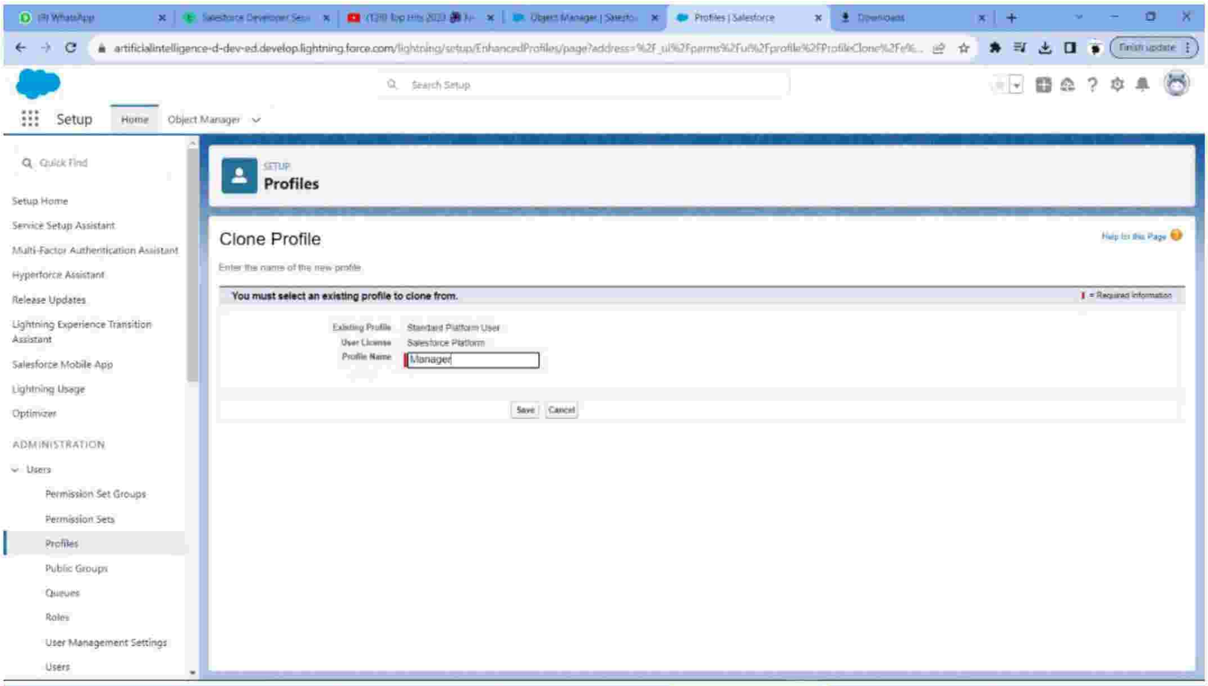
Solution:

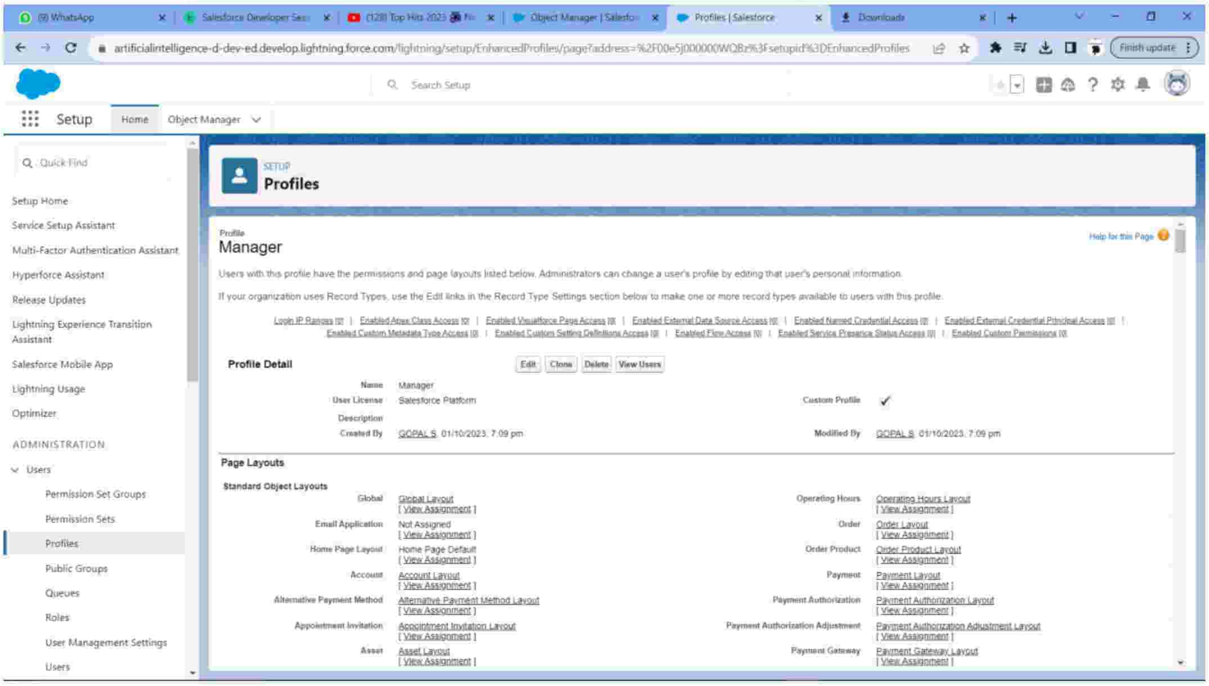
Step 1: Create two separate custom profiles, one for User A and one for User B.

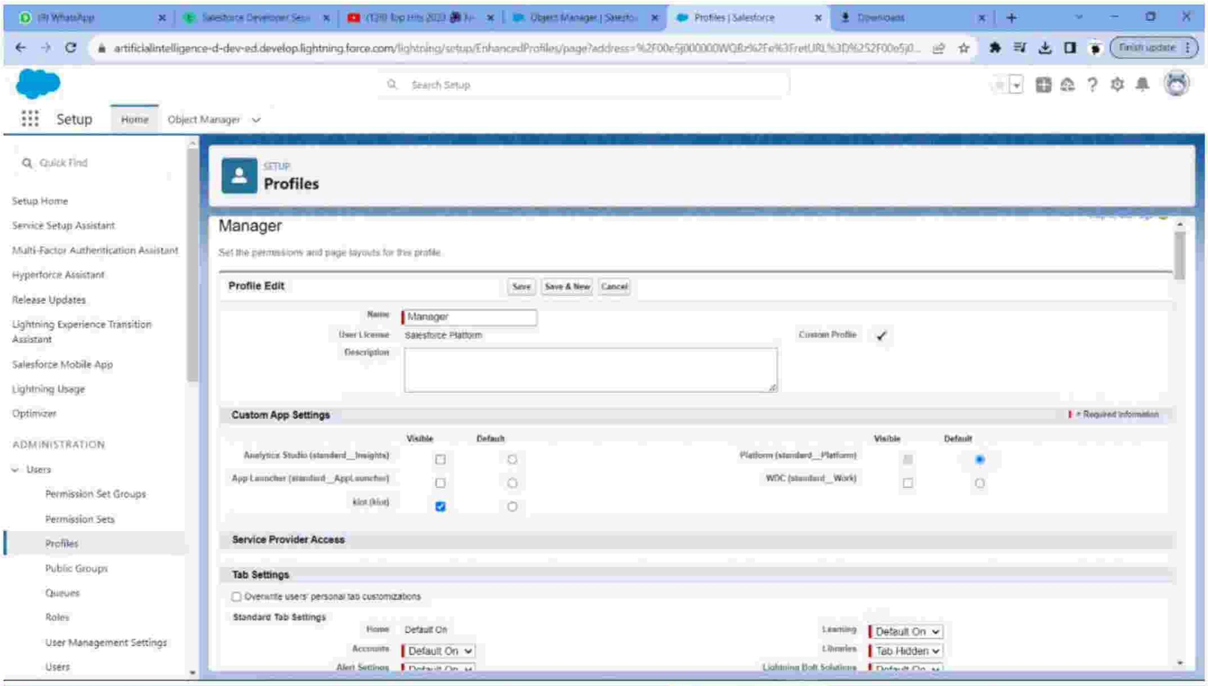
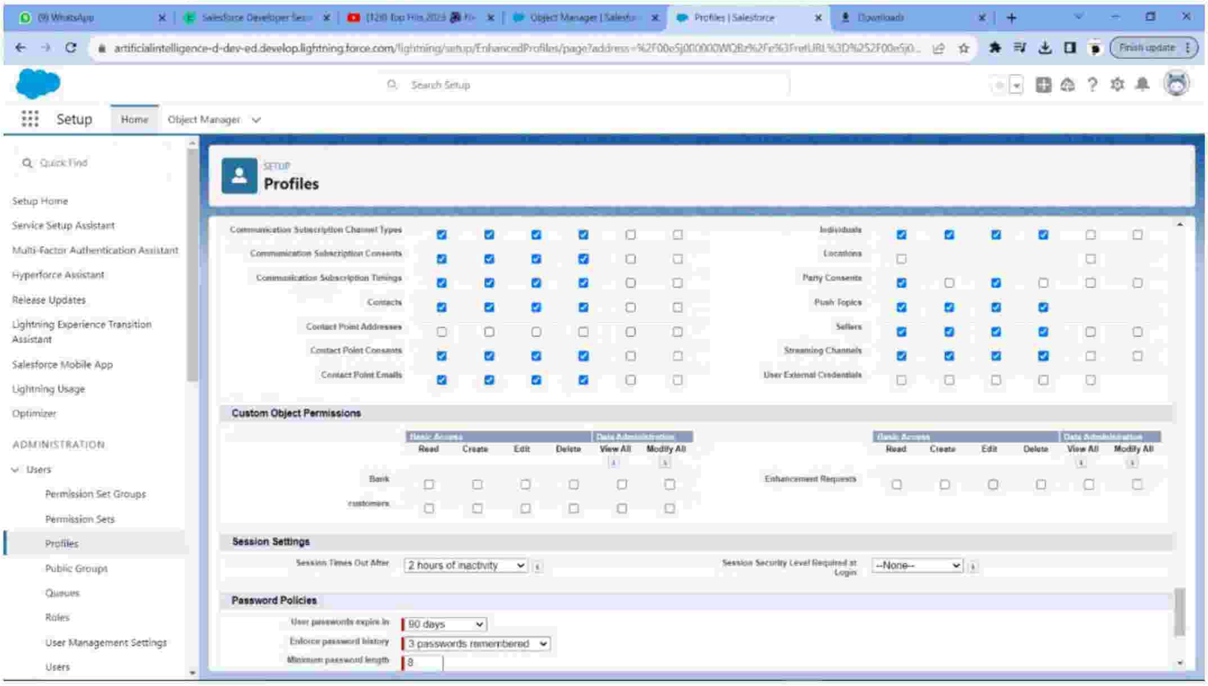


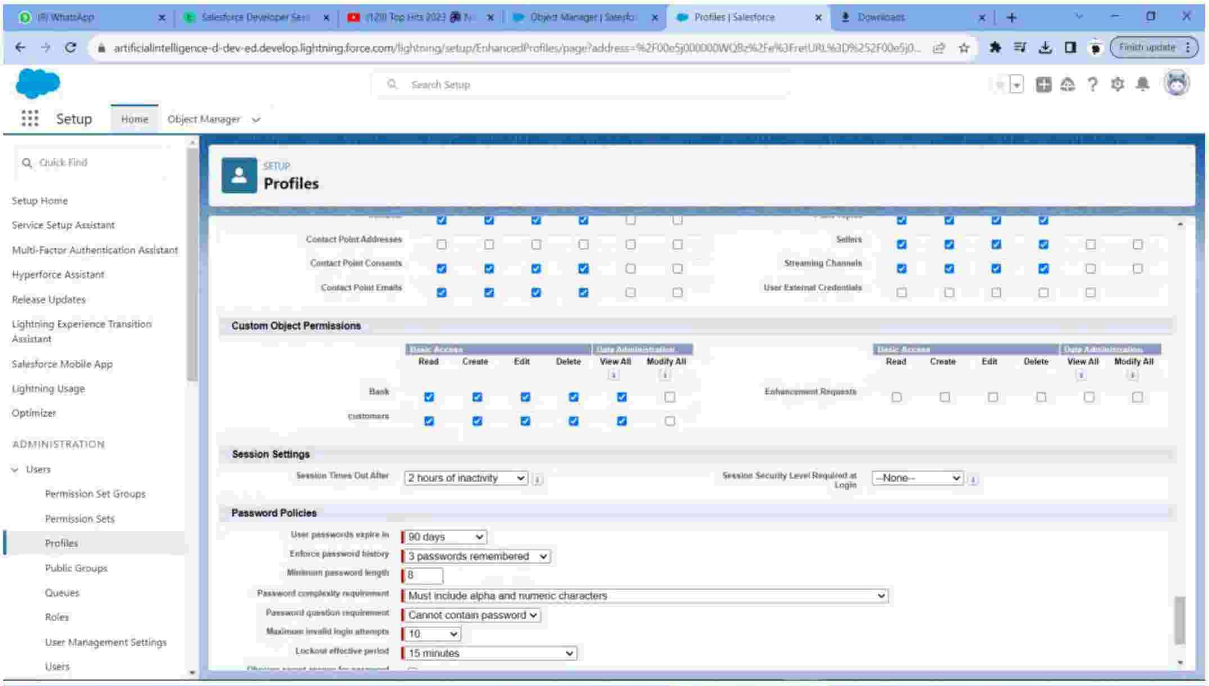

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
SETUP
Profiles
Profiles
All Profiles
New Profile
Action
Profile Name
User License
Custom
Edit | Clone
Salesforce API Only System Integrations
Salesforce Integration
salesmanager
Salesforce
Silver Partner User
Silver Partner
Solution Manager
Salesforce
Standard Platform User
Salesforce Platform
Standard User
Salesforce
System Administrator
Salesforce

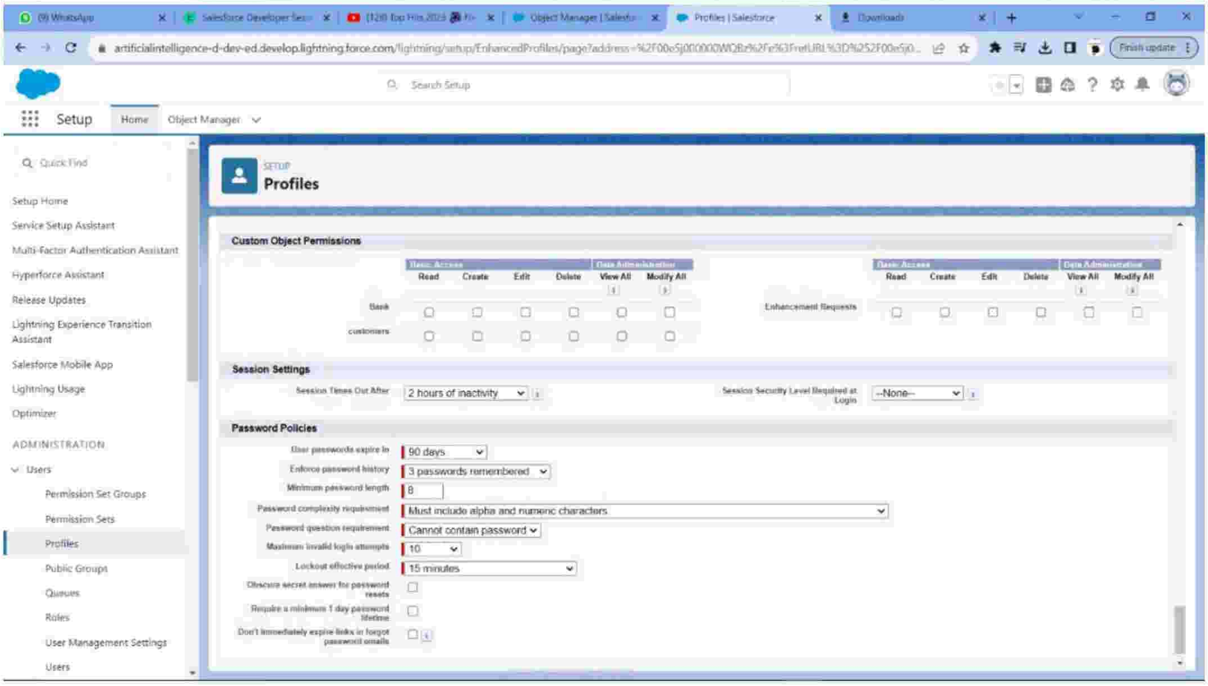

Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
SETUP
Profiles
Clone Profile
Enter the name of the new profile
You must select an existing profile to clone from.
Existing Profile
Standard Platform User
User License
Salesforce Platform
Profile Name
Save
Cancel

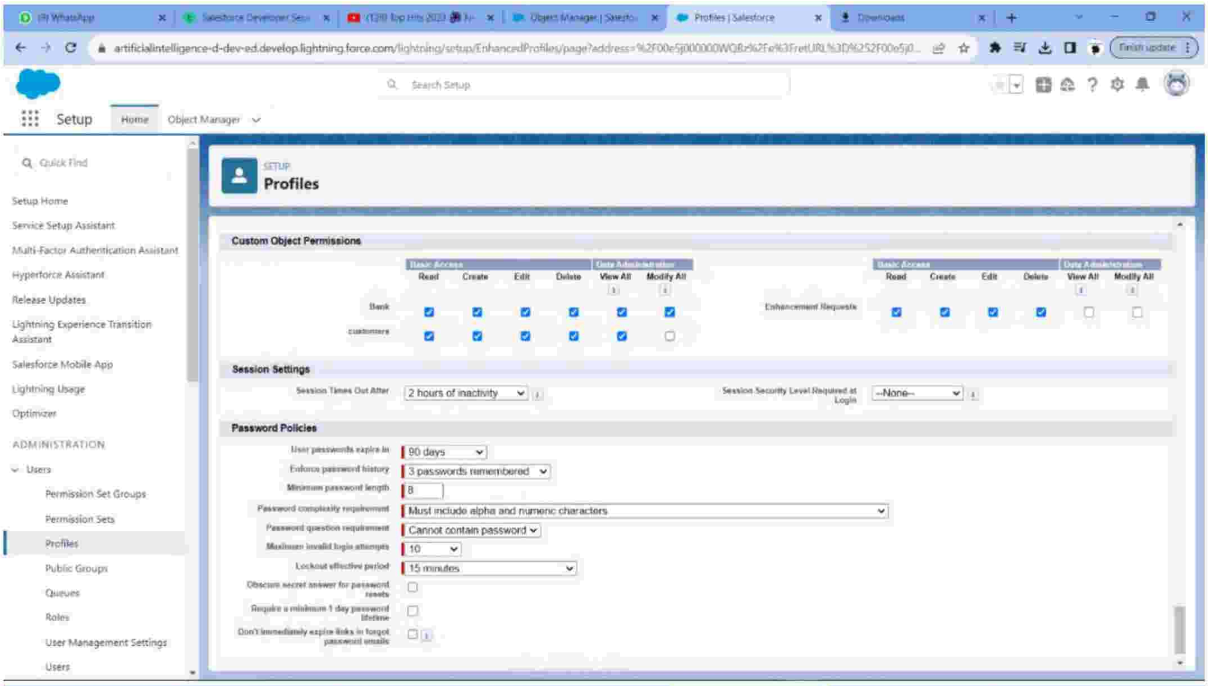

Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile
You must select an existing profile to clone from.
= Required Information
Existing Profile Standard Platform User
User License Salesforce Platform
Profile Name Manager
Save Cancel


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
SETUP
Profiles
Profile
Manager
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.
Profile Detail
Edit Clone Delete View Users
Name Manager
User License Salesforce Platform
Custom Profile
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 Global Layout [View Assignment]
Email Application Not Assigned [View Assignment]
Home Page Layout Home Page Default [View Assignment]
Account Account Layout [View Assignment]
Alternative Payment Method Alternative Payment Method Layout [View Assignment]
Appointment Invitation Appointment Invitation Layout [View Assignment]
Asset Asset Layout [View Assignment]
Operating Hours Operating Hours Layout [View Assignment]
Order Order Layout [View Assignment]
Order Product Order Product Layout [View Assignment]
Payment Payment Layout [View Assignment]
Payment Authorization Payment Authorization Layout [View Assignment]
Payment Authorization Adjustment Payment Authorization Adjustment Layout [View Assignment]
Payment Gateway Payment Gateway Layout [View Assignment]


Setup
Profiles
Manager
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
Manager
User License
Salesforce Platform
Custom Profile
Description
Custom App Settings
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings

Setup
Profiles
Custom Object Permissions
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8


Setup
Home
Object Manager
Profiles
Contact Point Addresses
Contact Point Consents
Contact Point Emails
Sellers
Streaming Channels
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
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


Setup
Home
Object Manager
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
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
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails


Profiles | Salesforce
Setup
Home
Object Manager
SETUP
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
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
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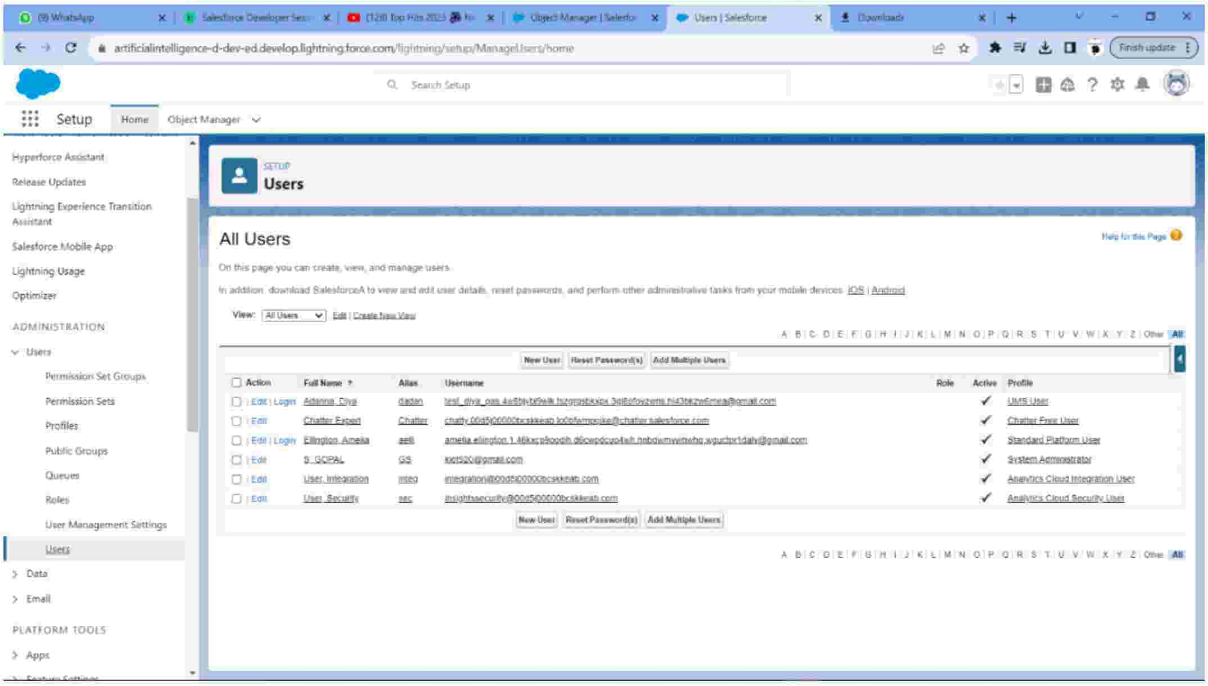
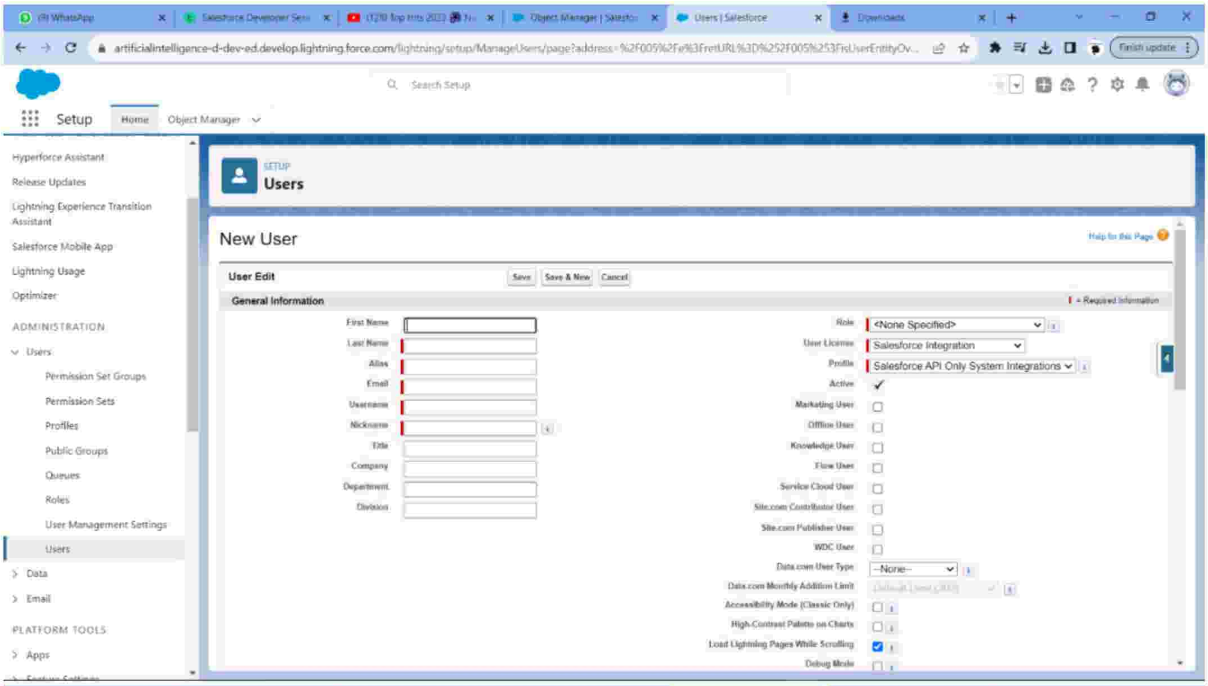
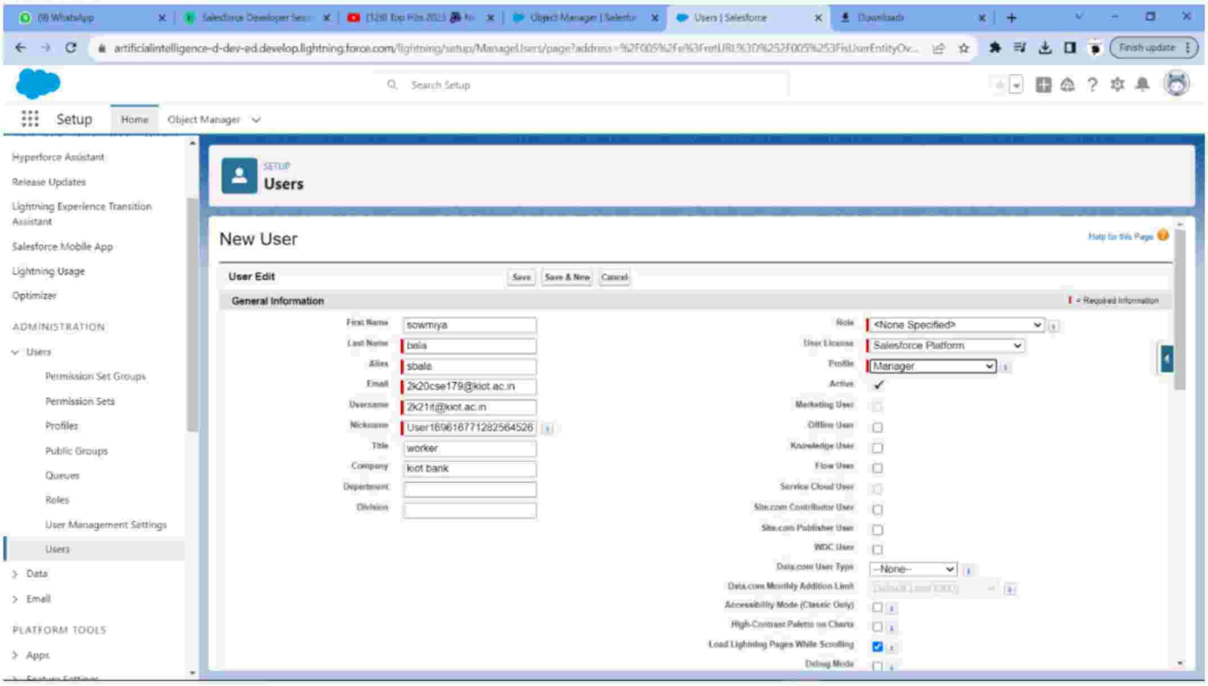
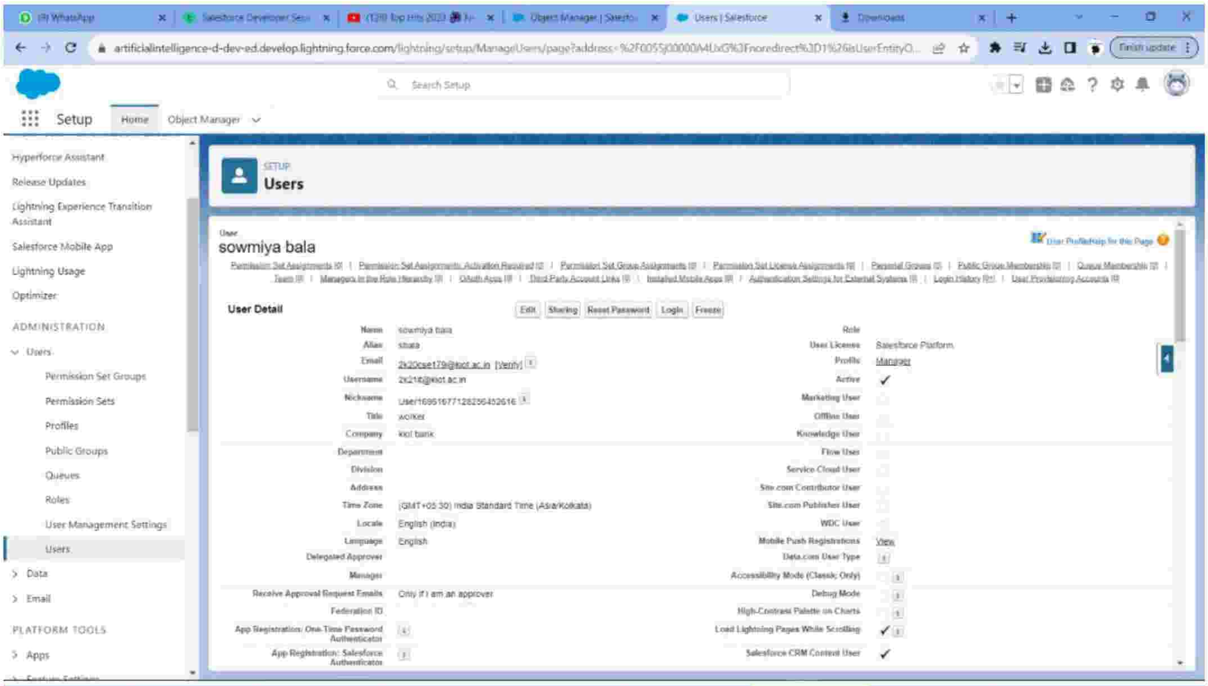
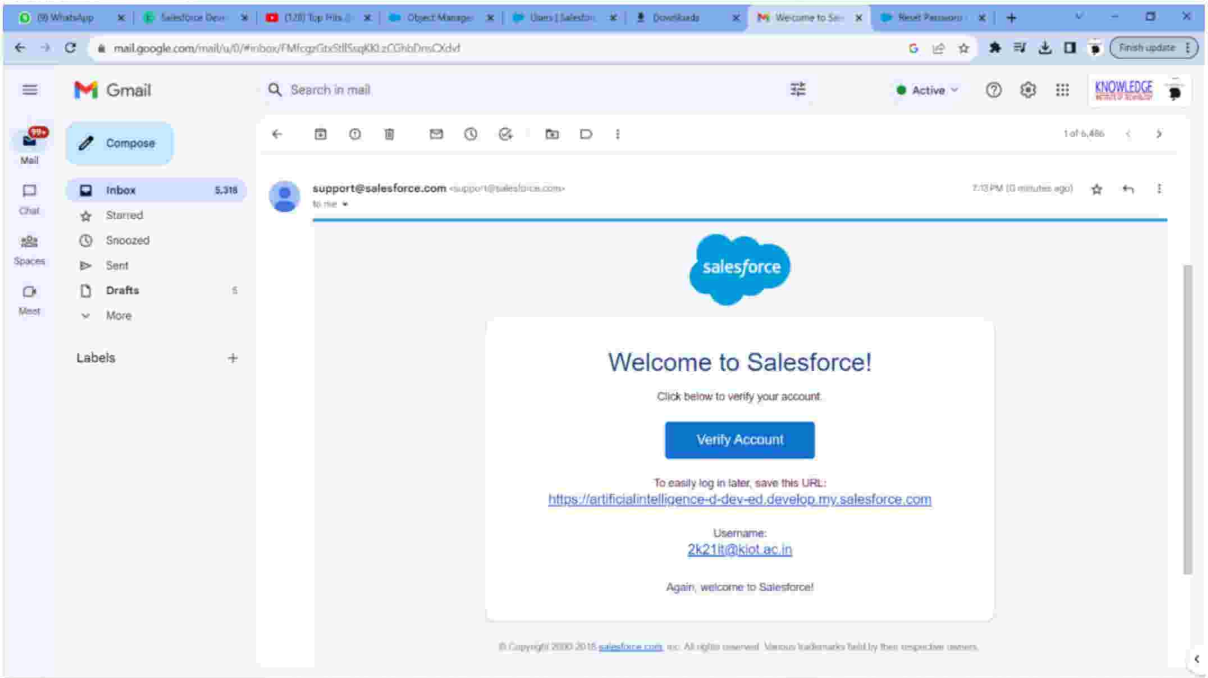
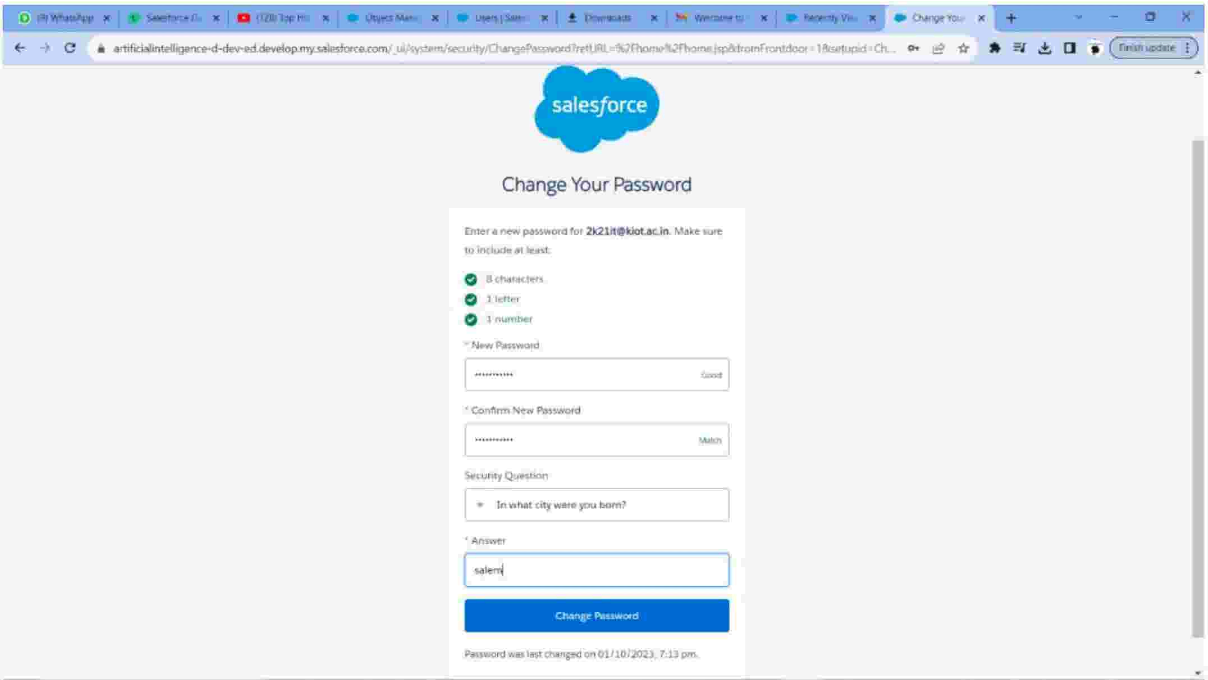
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning 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

Users | Salesforce
Setup
Home
Object Manager
SETUP
Users
All Users
On this page you can create, view, and manage users.
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android
View: All Users
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile
Adanna, Diya
Chatter Expert
Ellington, Amelia
S, GOPAL
User, Integration
User, Security
UMS User
Chatter Free User
Standard Platform User
System Administrator
Analytics Cloud Integration User
Analytics Cloud Security User
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Apps


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv...
Setup
Home
Object Manager
Search Setup
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Apps
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division
Role
<None Specified>
User License
Salesforce Integration
Profile
Salesforce API Only System Integrations
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode

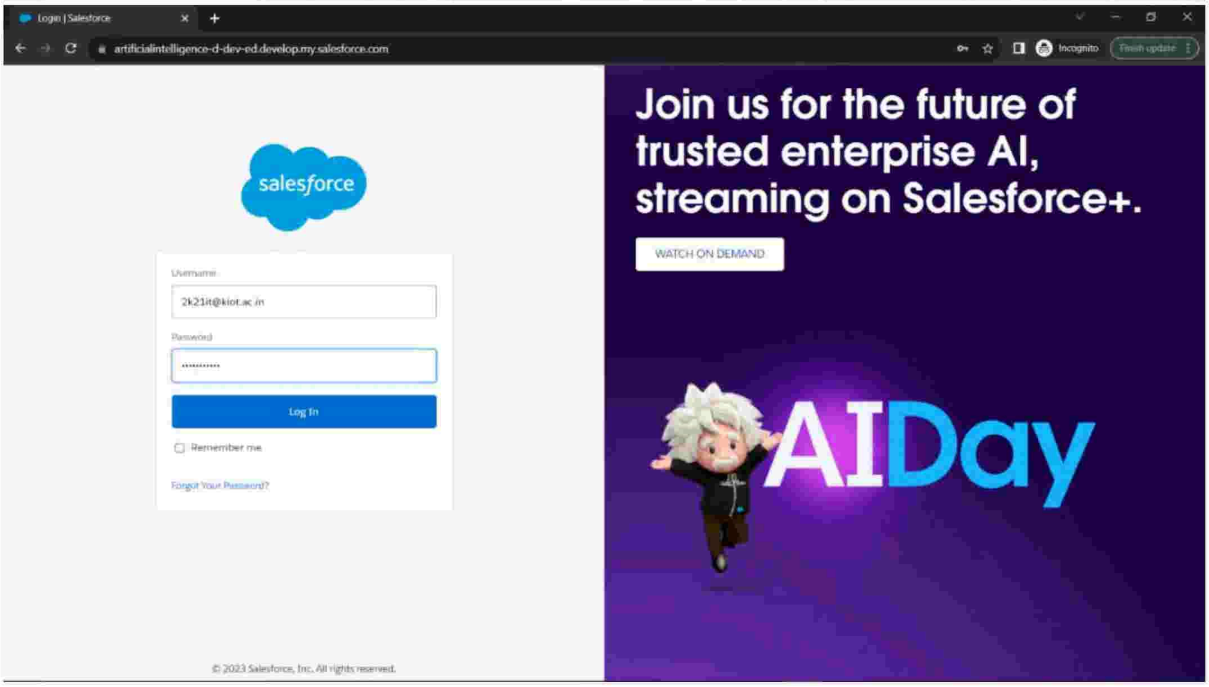

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv...
Setup
Home
Object Manager
Search Setup
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
sowmiya
Last Name
bala
Alias
sbala
Email
2k20cse179@kiot.ac.in
Username
2k21it@kiot.ac.in
Nickname
User16961677128256452б
Title
worker
Company
kiot bank
Department
Division
Role
<None Specified>
User License
Salesforce Platform
Profile
Manager
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode


Setup
Home
Object Manager
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Apps
SETUP
Users
sowmiya bala
User Detail
Edit
Sharing
Reset Password
Login
Freeze
Name sowmiya bala
Alias sbala
Username 2k21it@kiot.ac.in
Title worker
Company kiot bank
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Receive Approval Request Emails Only if I am an approver
User License Salesforce Platform
Profile Manager
Active

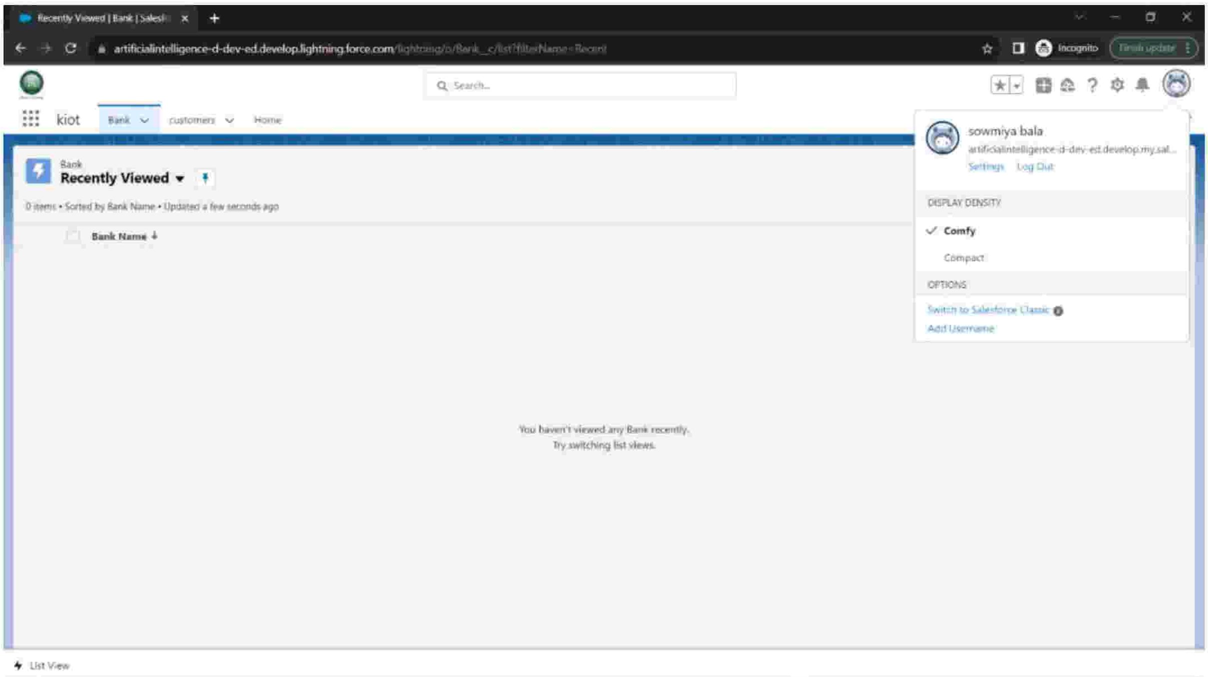

Gmail
Search in mail
Active
Compose
Inbox 5,316
Starred
Snoozed
Sent
Drafts
More
Labels
Mail
Chat
Spaces
Meet
support@salesforce.com
salesforce
Welcome to Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://artificialintelligence-d-dev-ed.develop.my.salesforce.com
Username:
2k21it@kiot.ac.in
Again, welcome to Salesforce!



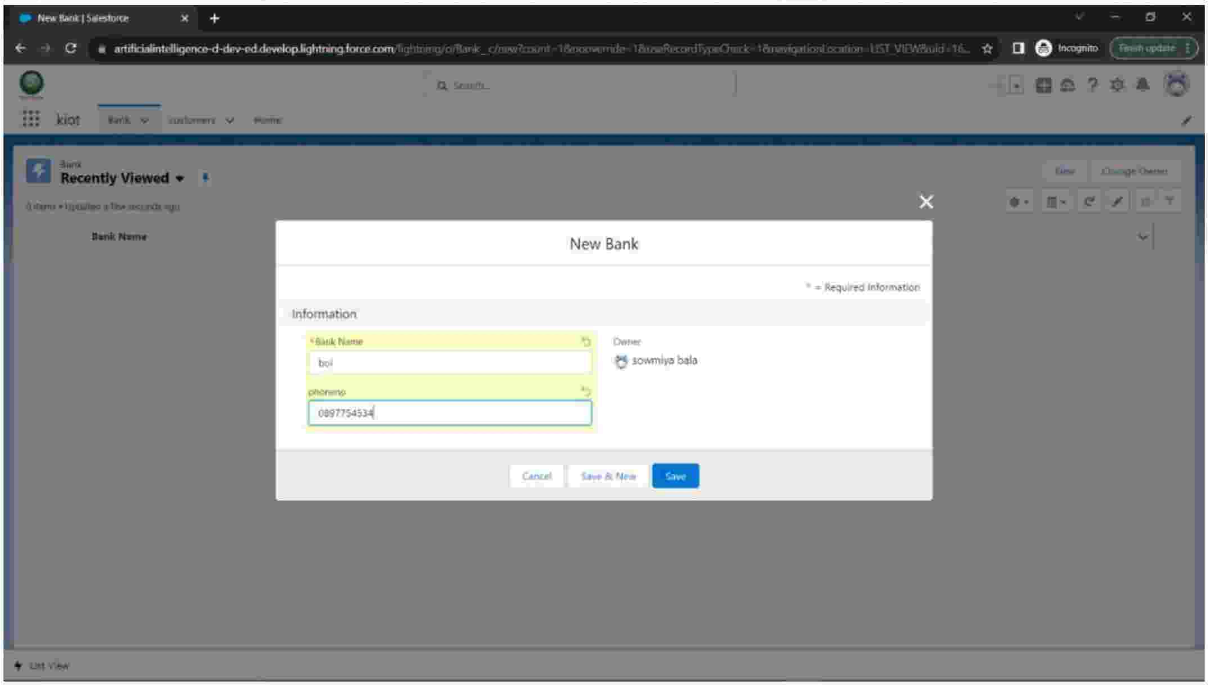
artificialintelligence-d-dev-ed.develop.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupid=Ch...
salesforce
Change Your Password
Enter a new password for 2k21it@kiot.ac.in. Make sure to include at least:
8 characters
1 letter
1 number
* New Password
Good
* Confirm New Password
Match
Security Question
In what city were you born?
* Answer
salem
Change Password
Password was last changed on 01/10/2023, 7:13 pm.



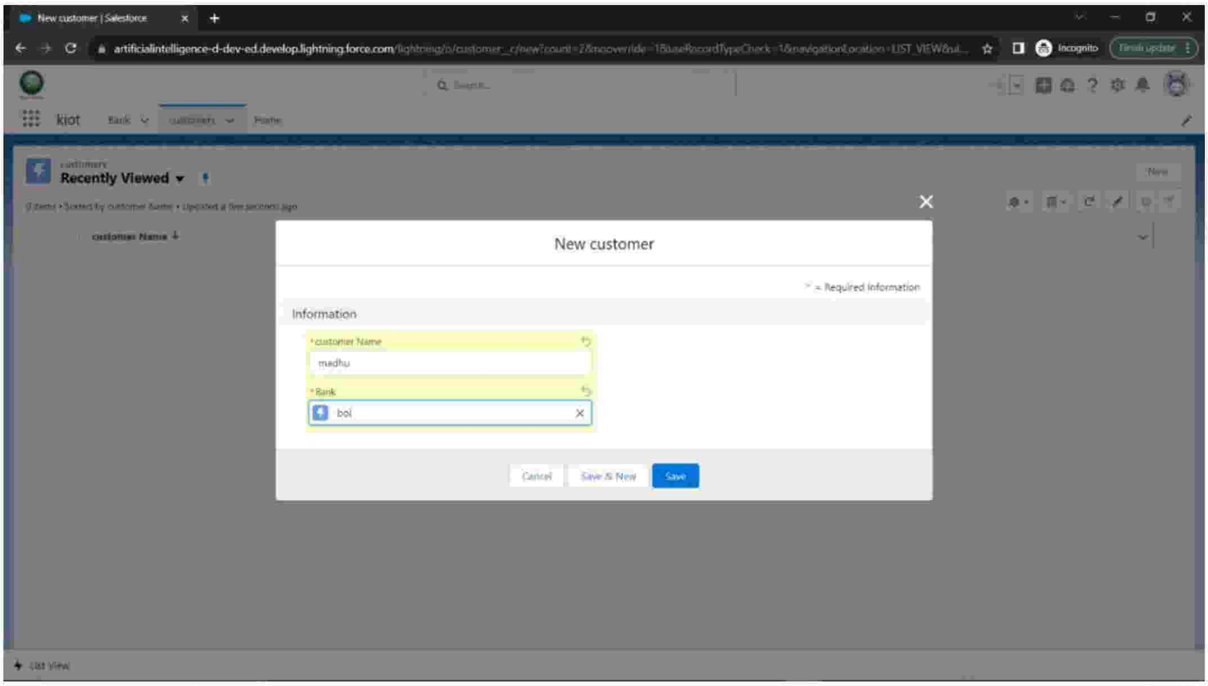
Login | Salesforce
artificialintelligence-d-dev-ed.develop.my.salesforce.com
salesforce
Username
2k21it@kiot.ac.in
Password
Log In
Remember me
Forgot Your Password?
© 2023 Salesforce, Inc. All rights reserved.
Join us for the future of trusted enterprise AI, streaming on Salesforce+.
WATCH ON DEMAND
AIDay

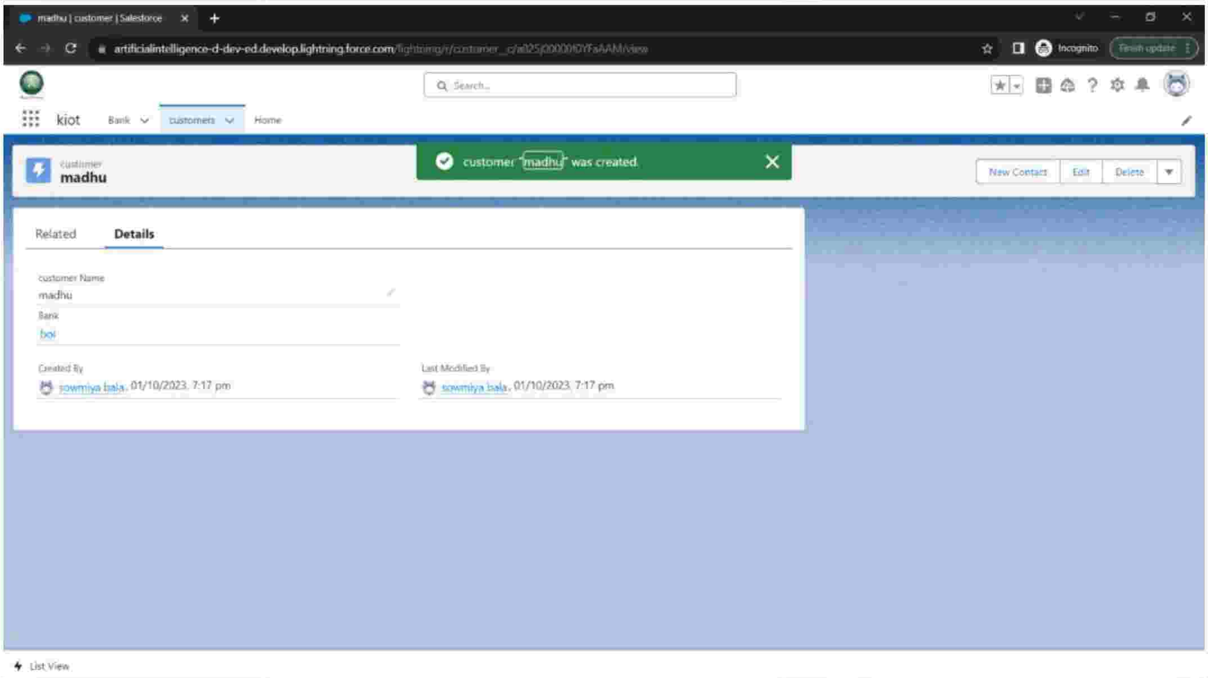


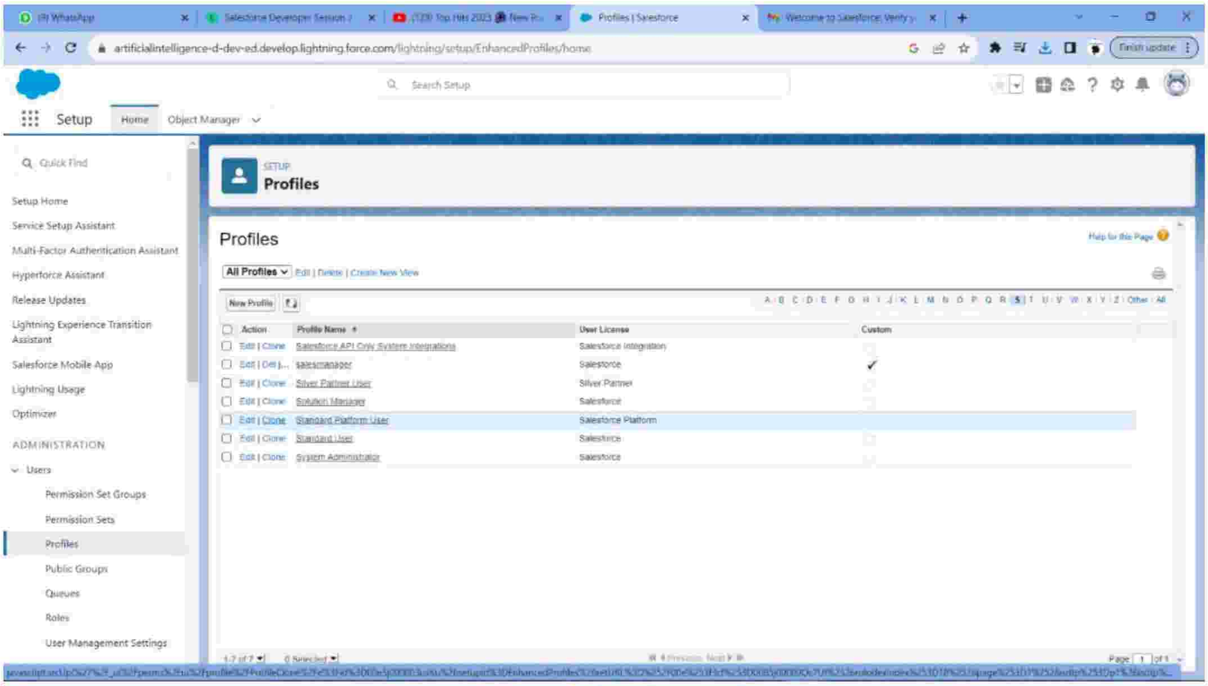
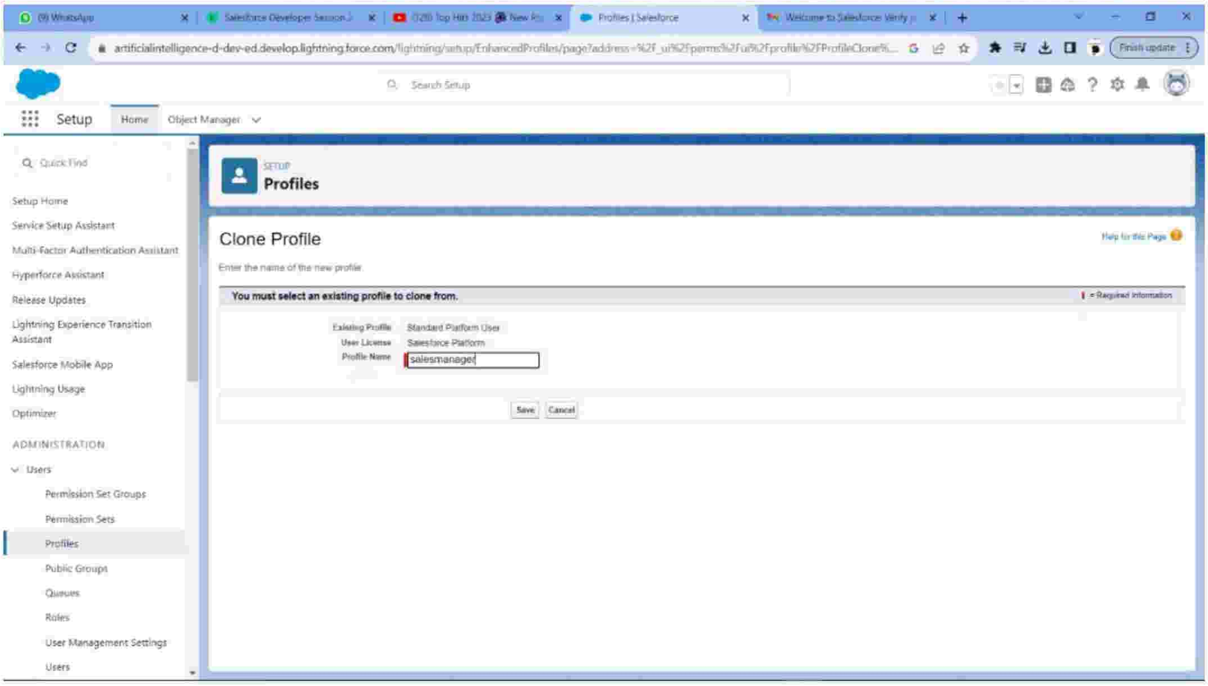
Recently Viewed | Bank | Salesfo
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/list?filterName=Recent
kiot
Bank
customers
Home
Bank
Recently Viewed
0 items • Sorted by Bank Name • Updated a few seconds ago
Bank Name
sowmiya bala
Settings
Log Out
DISPLAY DENSITY
Comfy
Compact
OPTIONS
Switch to Salesforce Classic
Add Username
You haven't viewed any Bank recently.
Try switching list views.
List View

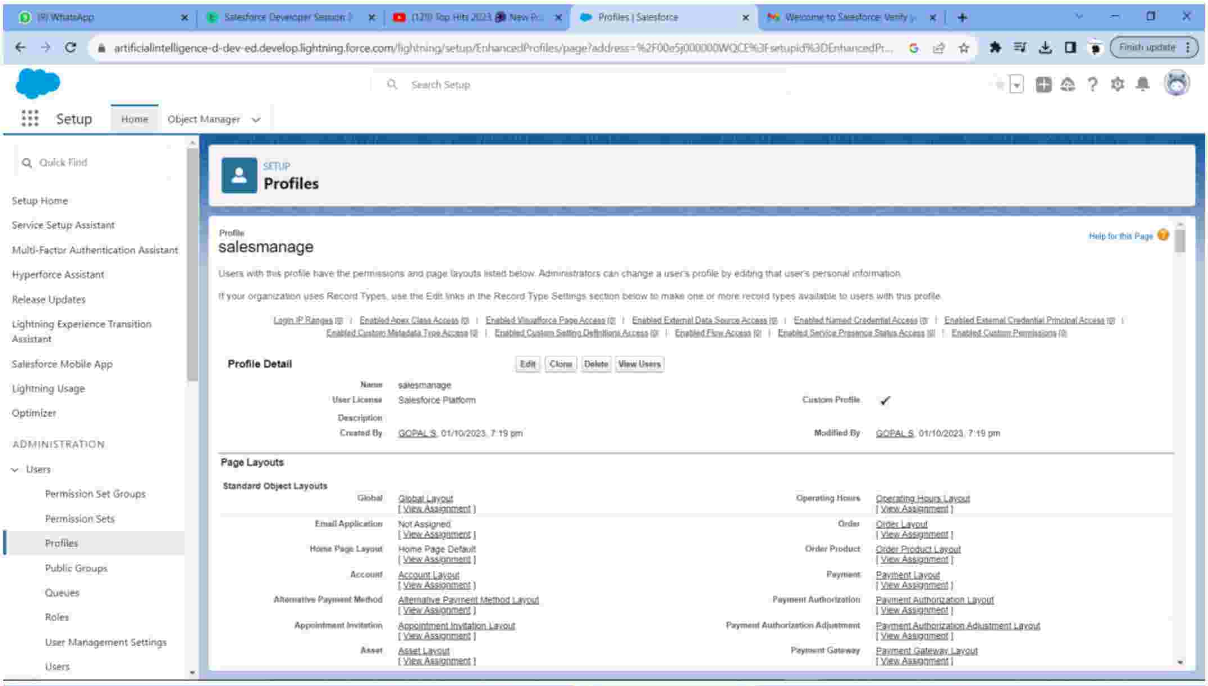


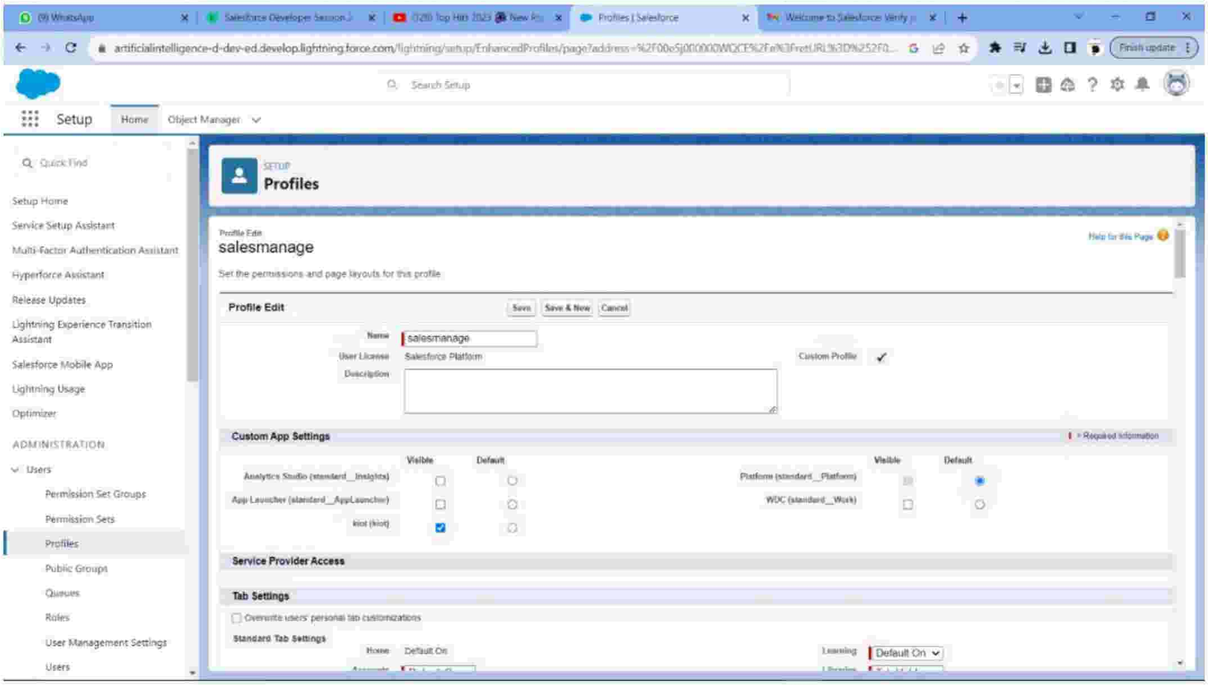
New Bank | Salesforce
kiot
Bank
customers
Home
Recently Viewed
New Bank
* = Required Information
Information
Bank Name
boi
Owner
sowmiya bala
phoneno
0897754534
Cancel
Save & New
Save
List View

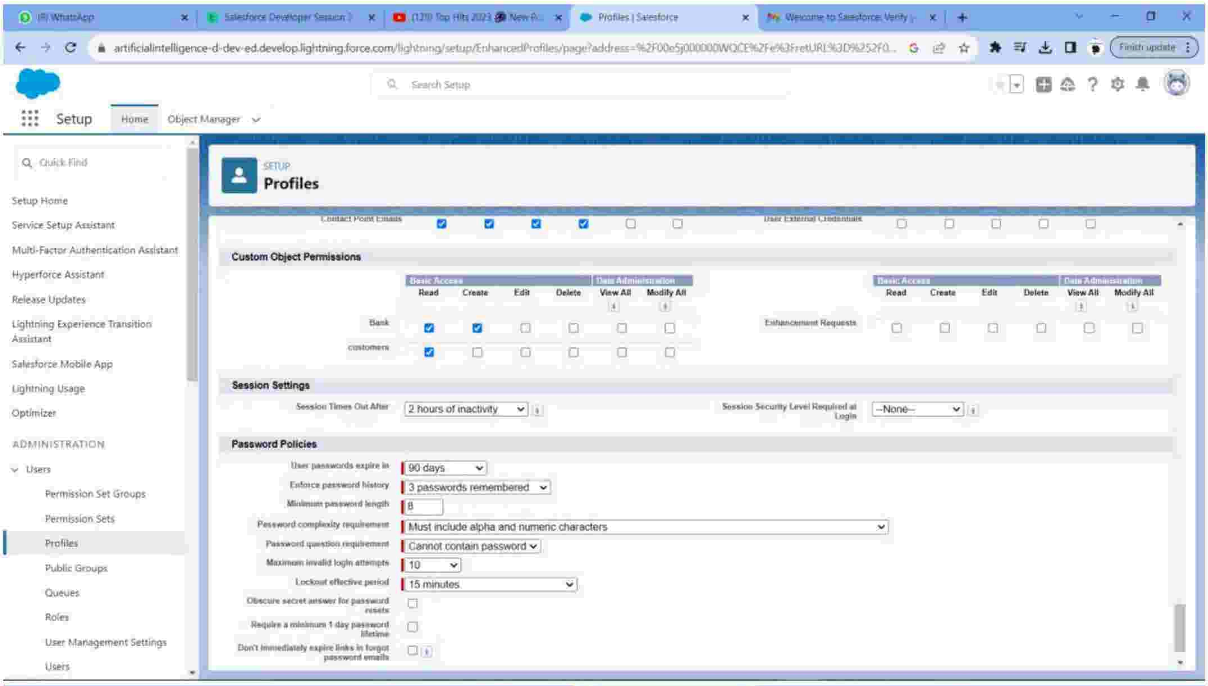

New customer
Information
customer Name
madhu
Bank
boi
Cancel
Save & New
Save


customer "madhu" was created.
customer
madhu
Related
Details
customer Name
madhu
Bank
boi
Created By
sowmiya bala, 01/10/2023, 7:17 pm
Last Modified By
sowmiya bala, 01/10/2023, 7:17 pm

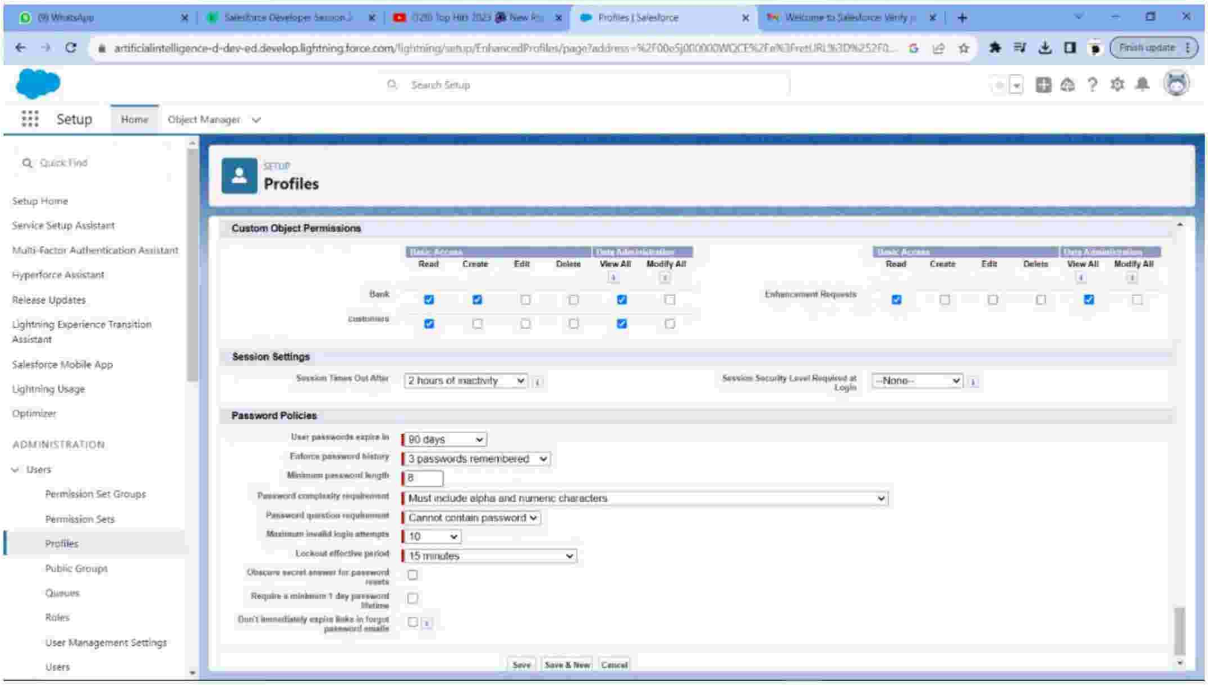

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
SETUP
Profiles
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
Action
Profile Name
User License
Custom
Edit | Clone
Salesforce API Only System Integrations
Salesforce Integration
salesmanager
Salesforce
Silver Partner User
Silver Partner
Solution Manager
Salesforce
Standard Platform User
Salesforce Platform
Standard User
Salesforce
System Administrator
Salesforce

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
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile
You must select an existing profile to clone from.
= Required Information
Existing Profile
Standard Platform User
User License
Salesforce Platform
Profile Name
salesmanager
Save
Cancel


Profiles | Salesforce
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%3Fsetupid%3DEnhancedPr...
Search Setup
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
SETUP
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.
Profile Detail
Edit
Clone
Delete
View Users
Name salesmanage
User License Salesforce Platform
Custom Profile ✓
Description
Created By GOPAL S, 01/10/2023, 7:19 pm
Modified By GOPAL S, 01/10/2023, 7:19 pm
Page Layouts
Standard Object Layouts
Global Global Layout [View Assignment]
Operating Hours Operating Hours Layout [View Assignment]
Email Application Not Assigned [View Assignment]
Order Order Layout [View Assignment]
Home Page Layout Home Page Default [View Assignment]
Order Product Order Product Layout [View Assignment]
Account Account Layout [View Assignment]
Payment Payment Layout [View Assignment]
Alternative Payment Method Alternative Payment Method Layout [View Assignment]
Payment Authorization Payment Authorization Layout [View Assignment]
Appointment Invitation Appointment Invitation Layout [View Assignment]
Payment Authorization Adjustment Payment Authorization Adjustment Layout [View Assignment]
Asset Asset Layout [View Assignment]
Payment Gateway Payment Gateway Layout [View Assignment]

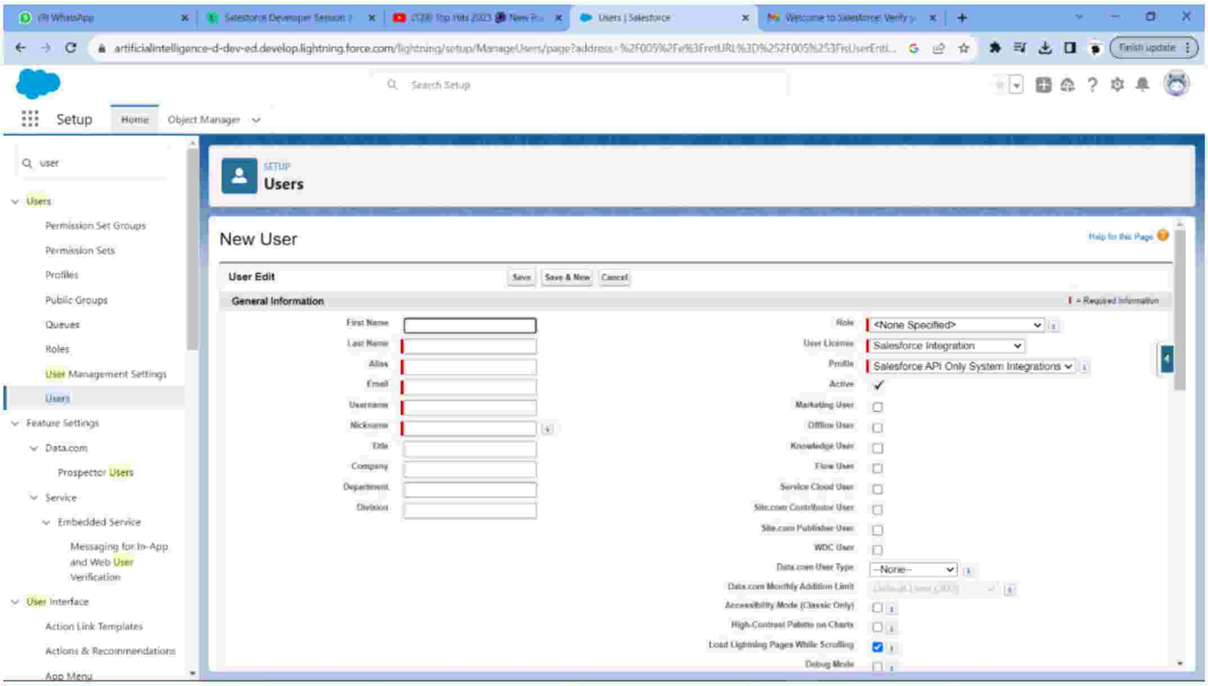

Profiles | Salesforce
Search Setup
Setup
Home
Object Manager
SETUP
Profiles
Profile Edit
salesmanage
Help for this Page
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name salesmanage
User License Salesforce Platform
Custom Profile ✓
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
kiot (kiot)
Platform (standard__Platform)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Home Default On
Learning Default On

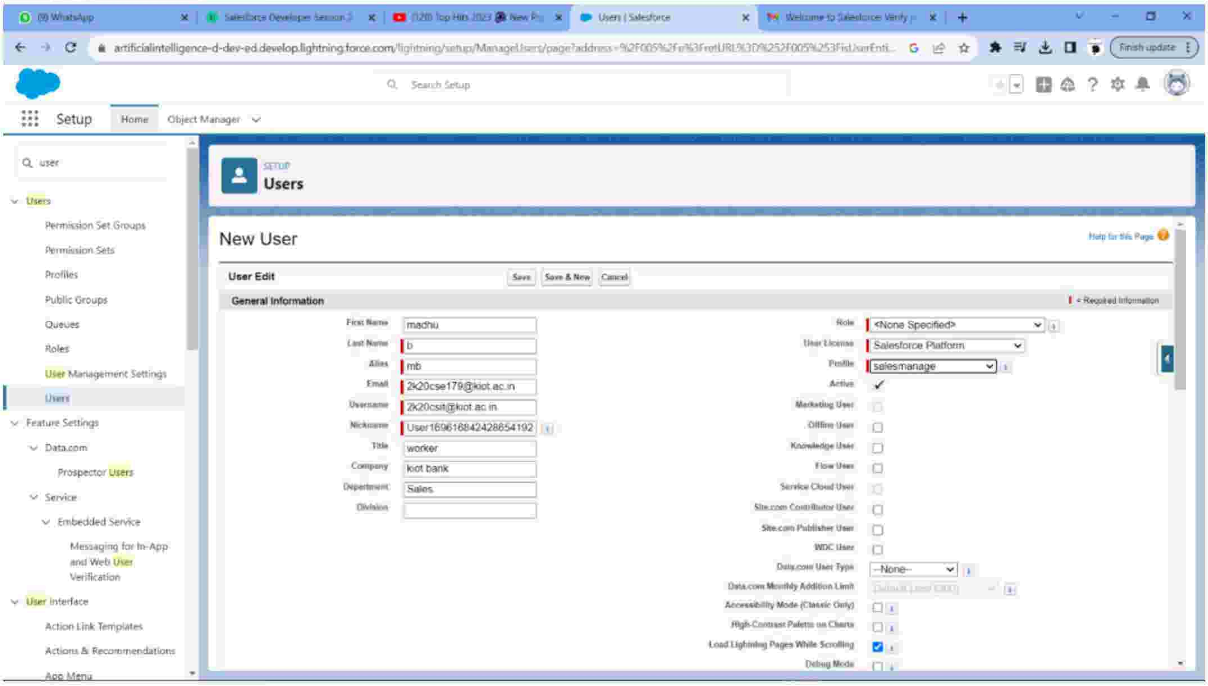


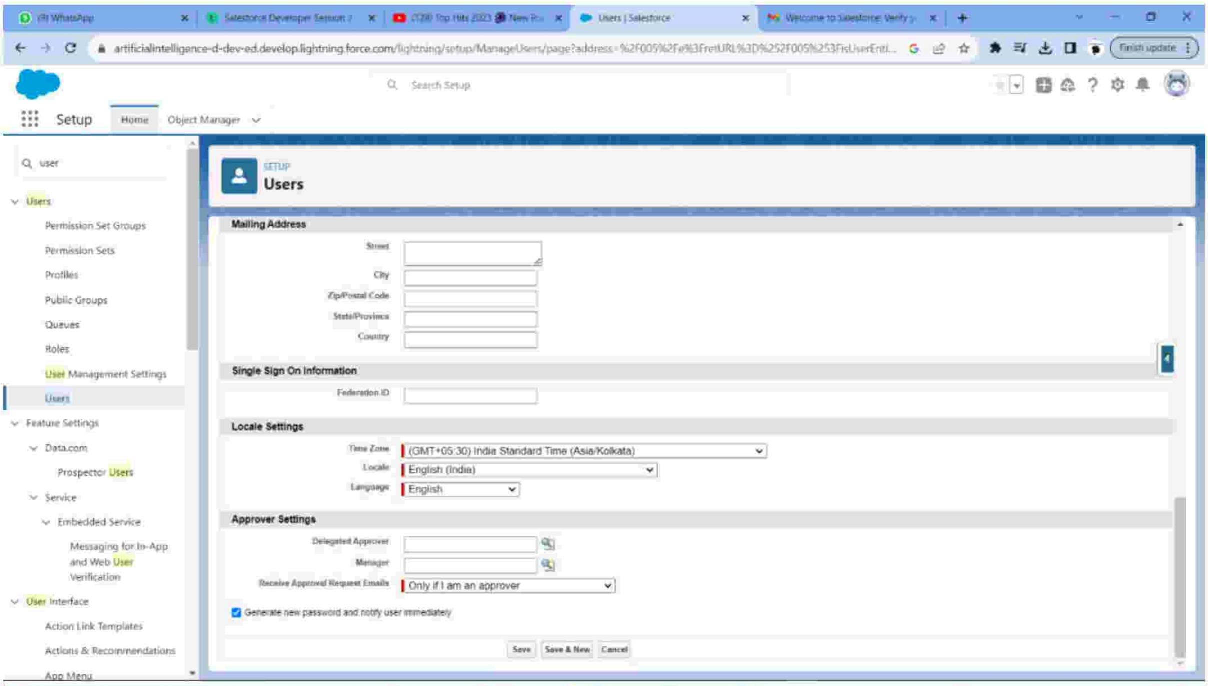
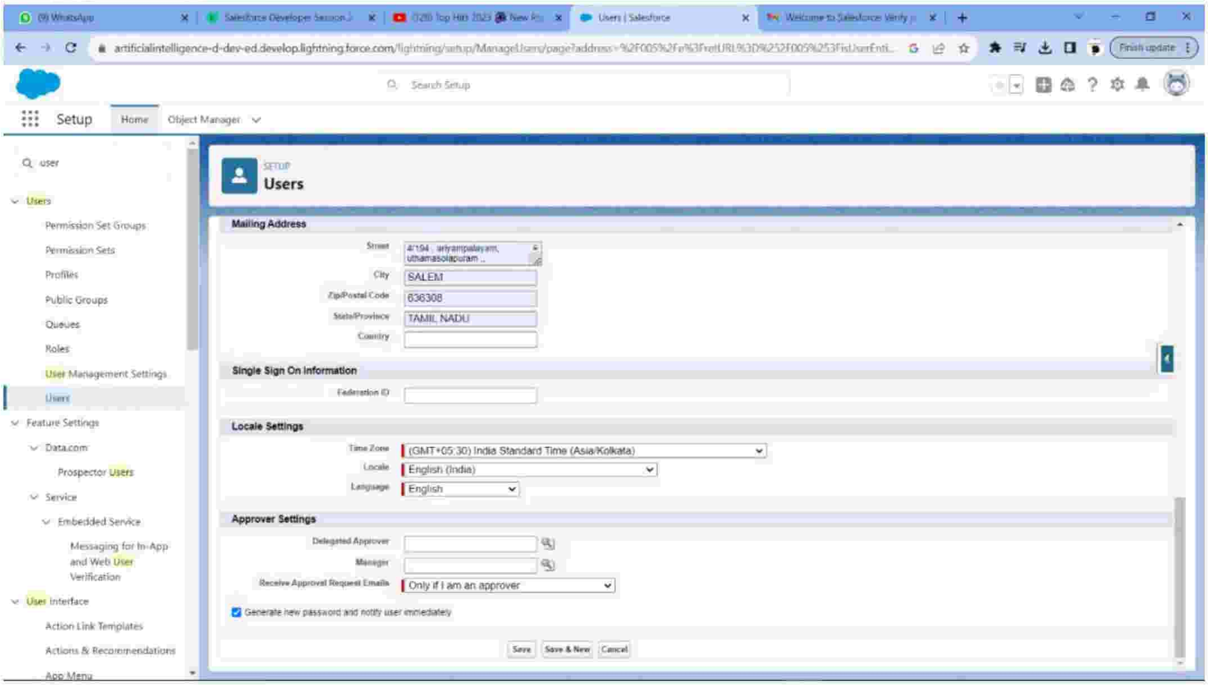
Setup
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire 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
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails

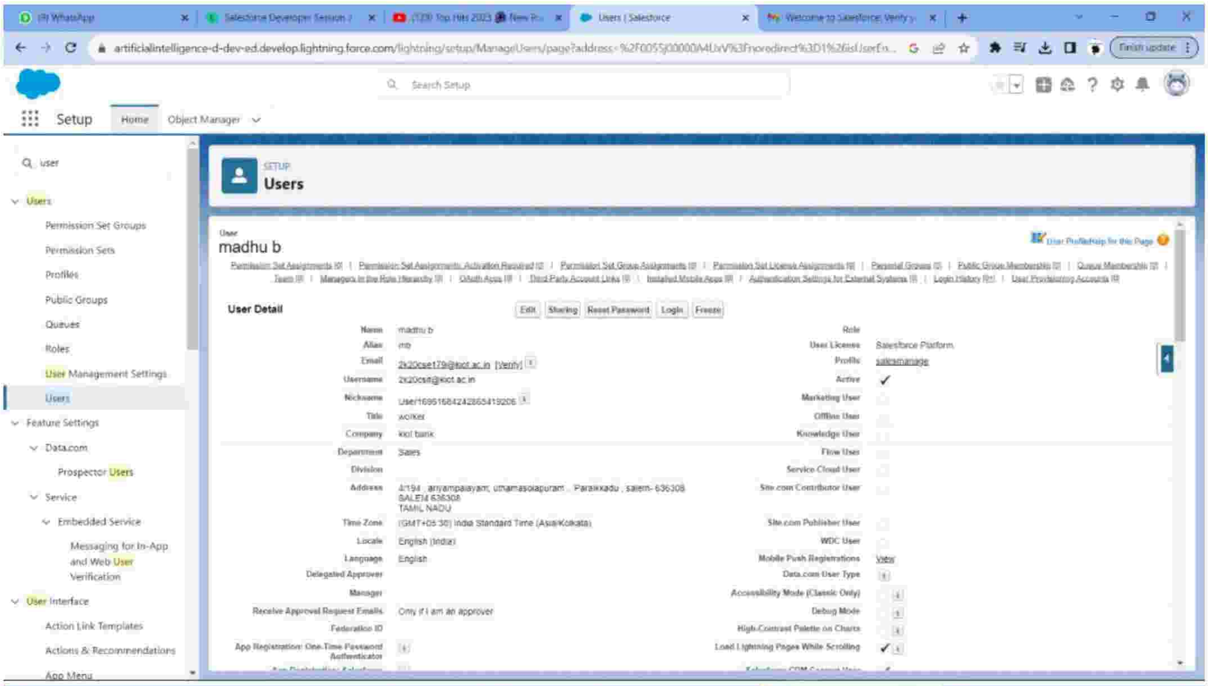
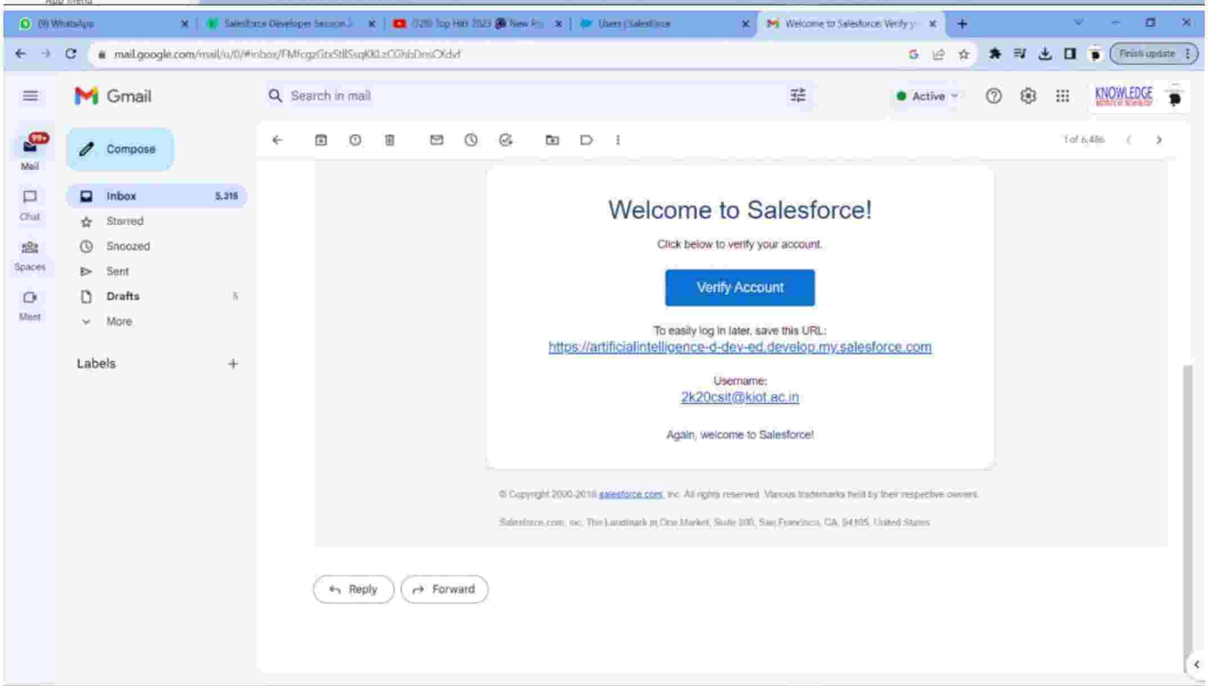


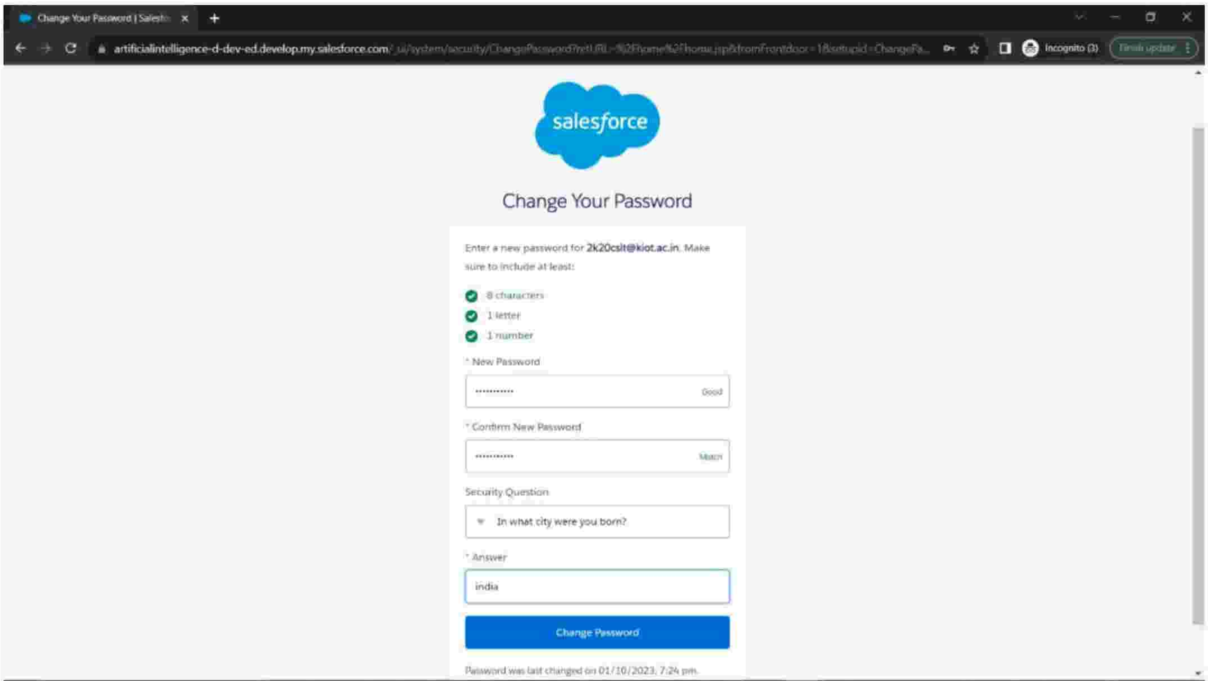
Setup
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire 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
Obscure 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


Setup
Home
Object Manager
Search Setup
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division
Role
<None Specified>
User License
Salesforce Integration
Profile
Salesforce API Only System Integrations
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode

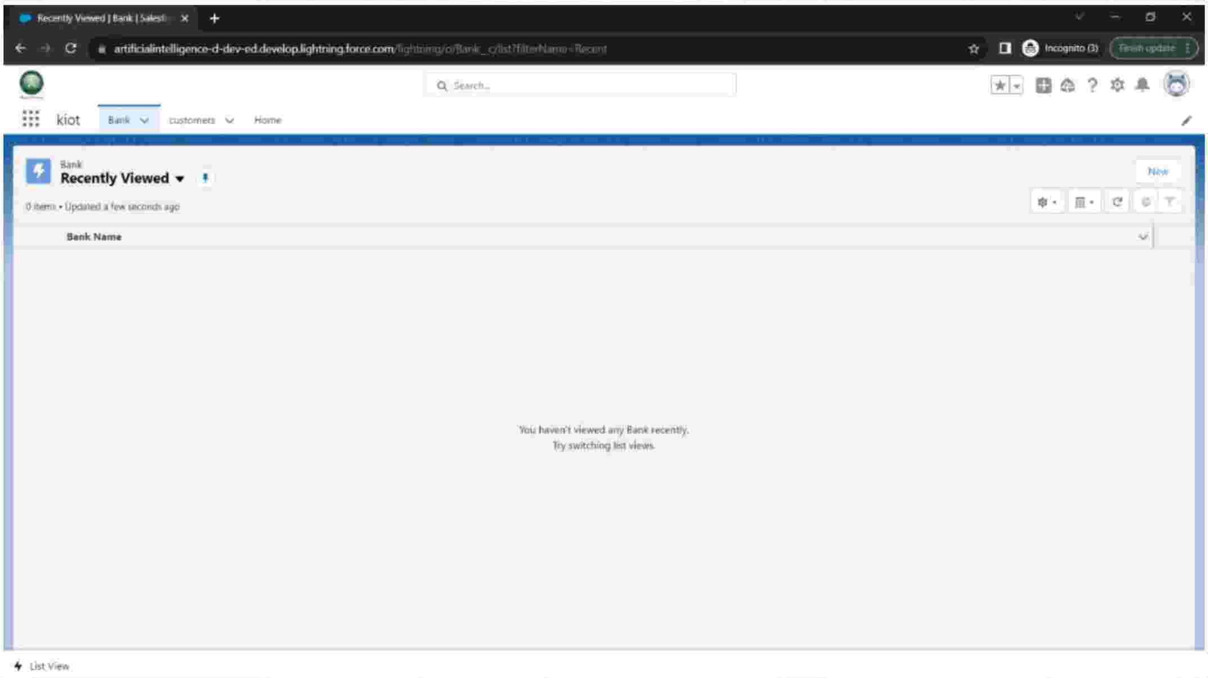

Setup
Home
Object Manager
Search Setup
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
madhu
Last Name
b
Alias
mb
Email
2k20cse179@kiot.ac.in
Username
2k20csit@kiot.ac.in
Nickname
User16961684242865419
Title
worker
Company
kiot bank
Department
Sales
Division
Role
<None Specified>
User License
Salesforce Platform
Profile
salesmanage
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
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode


Setup
Home
Object Manager
Search Setup
SETUP
Users
Mailing Address
Street
City
Zip/Postal Code
State/Province
Country
Single Sign On Information
Federation ID
Locale Settings
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale
English (India)
Language
English
Approver Settings
Delegated Approver
Manager
Receive Approval Request Emails
Only if I am an approver
Generate new password and notify user immediately
Save
Save & New
Cancel
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu

Setup
Home
Object Manager
Search Setup
SETUP
Users
Mailing Address
Street
4/194 , ariyampalayam, uthamasolapuram ,
City
SALEM
Zip/Postal Code
636308
State/Province
TAMIL NADU
Country
Single Sign On Information
Federation ID
Locale Settings
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale
English (India)
Language
English
Approver Settings
Delegated Approver
Manager
Receive Approval Request Emails
Only if I am an approver
Generate new password and notify user immediately
Save
Save & New
Cancel

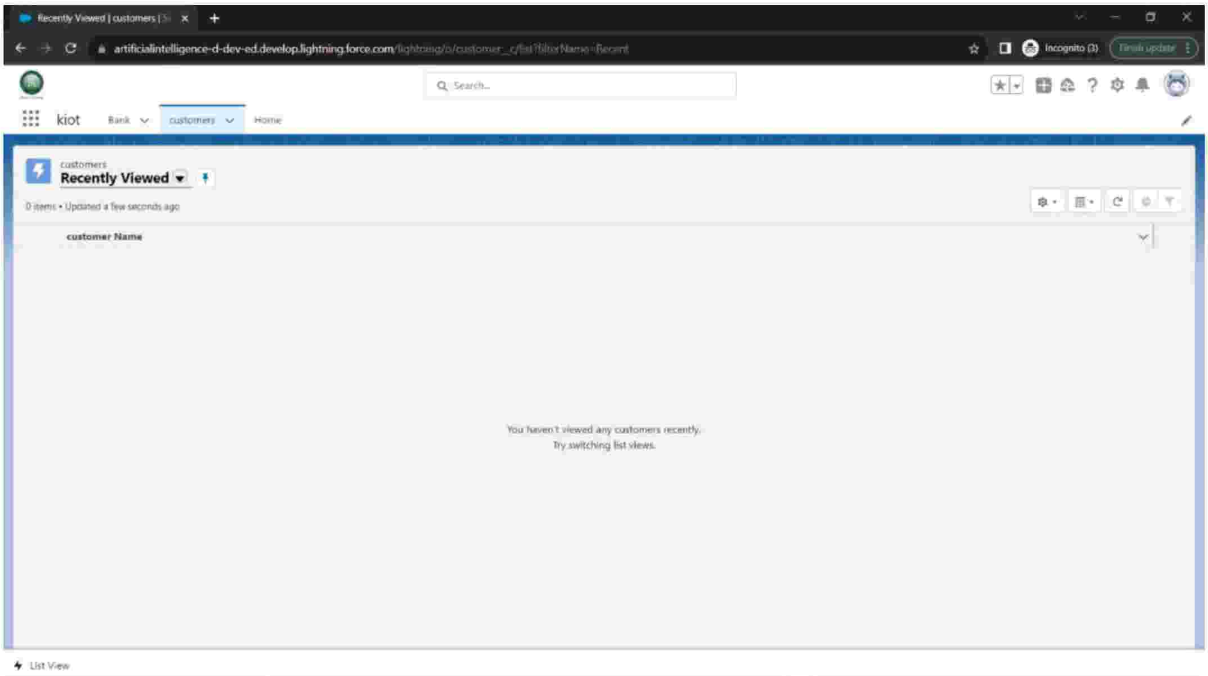

Setup
Home
Object Manager
SETUP
Users
madhu b
User Detail
Edit
Sharing
Reset Password
Login
Freeze
Name
madhu b
Alias
Email
Username
2k20csit@kiot.ac.in
Title
worker
Company
kiot bank
Department
Sales
Address
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale
English (India)
Language
English
User License
Salesforce Platform
Active
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations

Gmail
Search in mail
Compose
Inbox
Starred
Snoozed
Sent
Drafts
More
Labels
Welcome to Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://artificialintelligence-d-dev-ed.develop.my.salesforce.com
Username:
2k20csit@kiot.ac.in
Again, welcome to Salesforce!
Reply
Forward

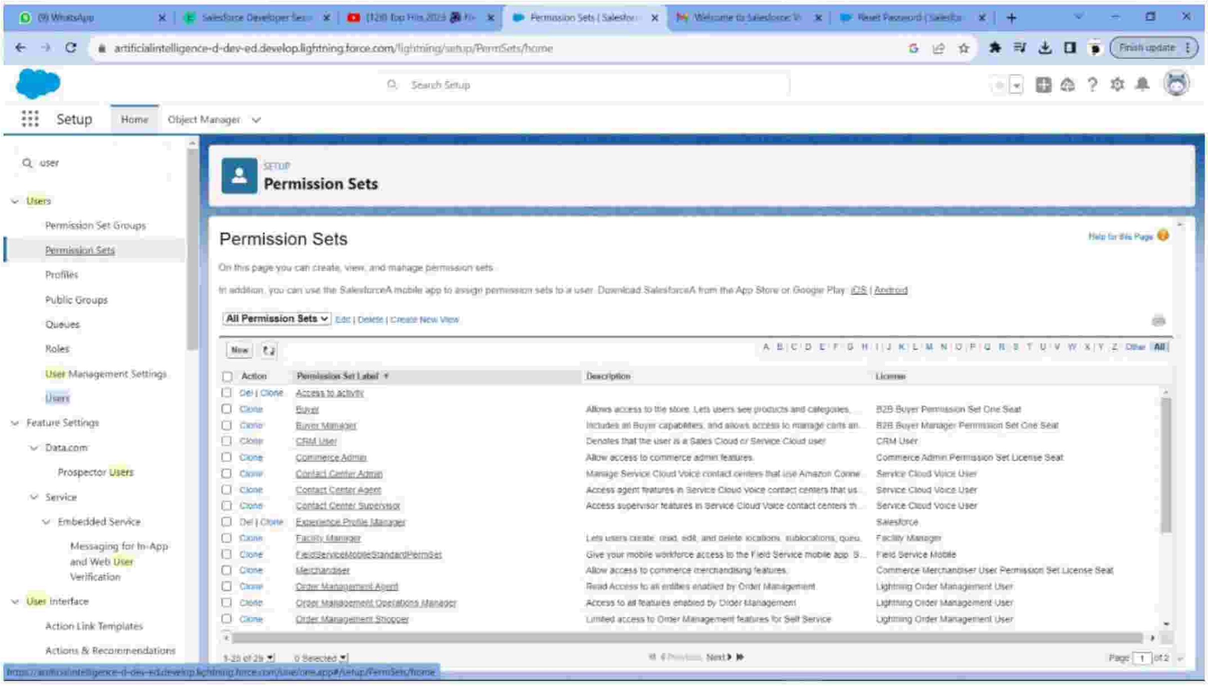


Change Your Password | Salesfo
artificialintelligence-d-dev-ed.develop.my.salesforce.com
Incognito (3)
salesforce
Change Your Password
Enter a new password for 2k20csit@kiot.ac.in. Make sure to include at least:
8 characters
1 letter
1 number
* New Password
Good
* Confirm New Password
Match
Security Question
In what city were you born?
* Answer
india
Change Password
Password was last changed on 01/10/2023, 7:24 pm.



Recently Viewed | Bank | Salesfo
artificialintelligence-d-dev-ed.develop.lightning.force.com
Incognito (3)
Search...
kiot
Bank
customers
Home
Bank
Recently Viewed
New
0 items • Updated a few seconds ago
Bank Name
You haven't viewed any Bank recently.
Try switching list views.
List View


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer__c/list?filterName=Recent
kiot
Bank
customers
Home
customers
Recently Viewed
0 items • Updated a few seconds ago
customer Name
You haven't viewed any customers recently.
Try switching list views.
List View


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home
Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
SETUP
Permission Sets
Permission Sets
On this page you can create, view, and manage permission sets.
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android
All Permission Sets
Edit | Delete | Create New View
Action
Permission Set Label
Description
License
Access to activity
Buyer
Buyer Manager
CRM User
Commerce Admin
Contact Center Admin
Contact Center Agent
Contact Center Supervisor
Experience Profile Manager
Facility Manager
FieldServiceMobileStandardPermSet
Merchandiser
Order Management Agent
Order Management Operations Manager
Order Management Shopper
B2B Buyer Permission Set One Seat
B2B Buyer Manager Permission Set One Seat
CRM User
Commerce Admin Permission Set License Seat
Service Cloud Voice User
Salesforce
Facility Manager
Field Service Mobile
Commerce Merchandiser User Permission Set License Seat
Lightning Order Management User

Step 2:

Permission Sets:

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

Object-Level Security:

• In each profile and permission set, set the object-level security for the Account object to

"Read" to ensure that both I-Jser A and I-Jser B can view Account records.

Record-Level Security:

• Implement record-level security using Criteria-Based Sharing Rules.

• Create a sharing rule that shares Account records owned by User A with User A and

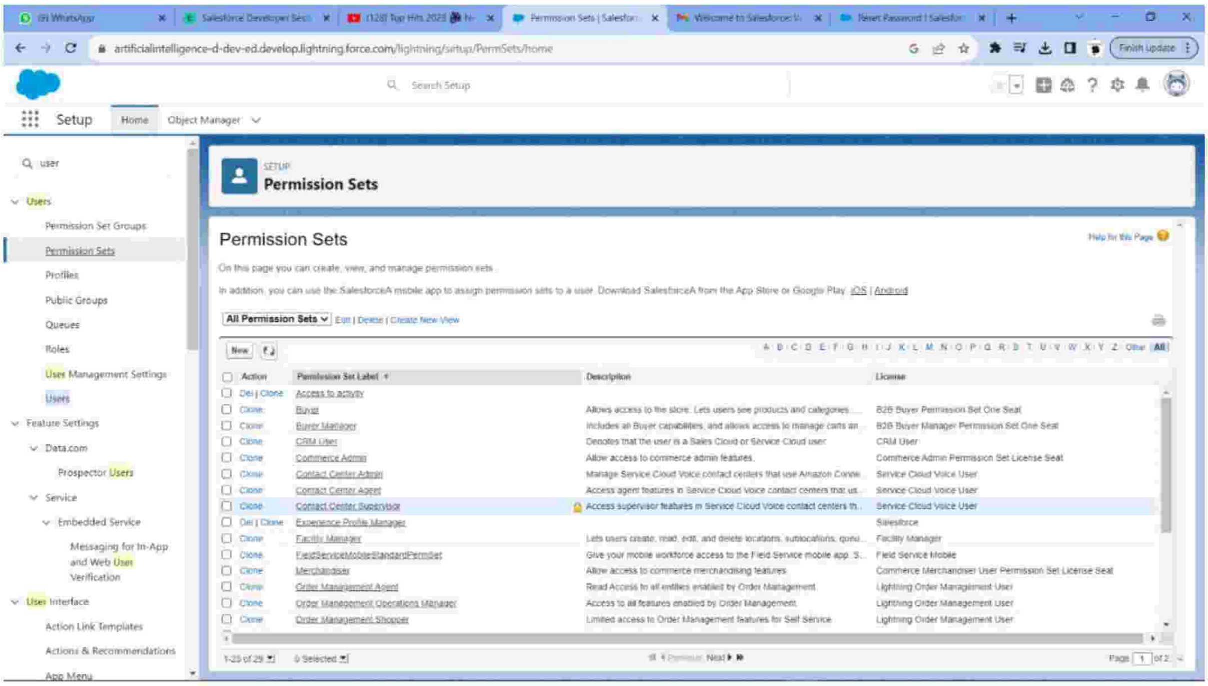
records owned by IJser B with user B.

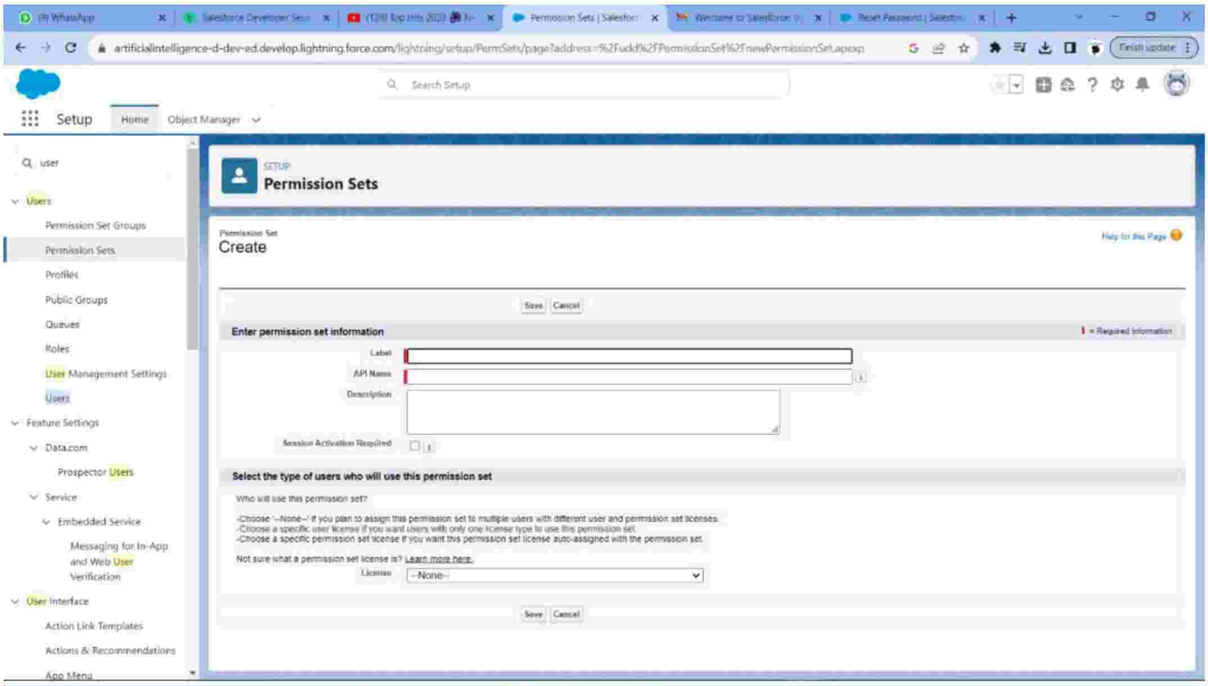
• For the sharing rule criteria, specify that records owned by User A are shared with user

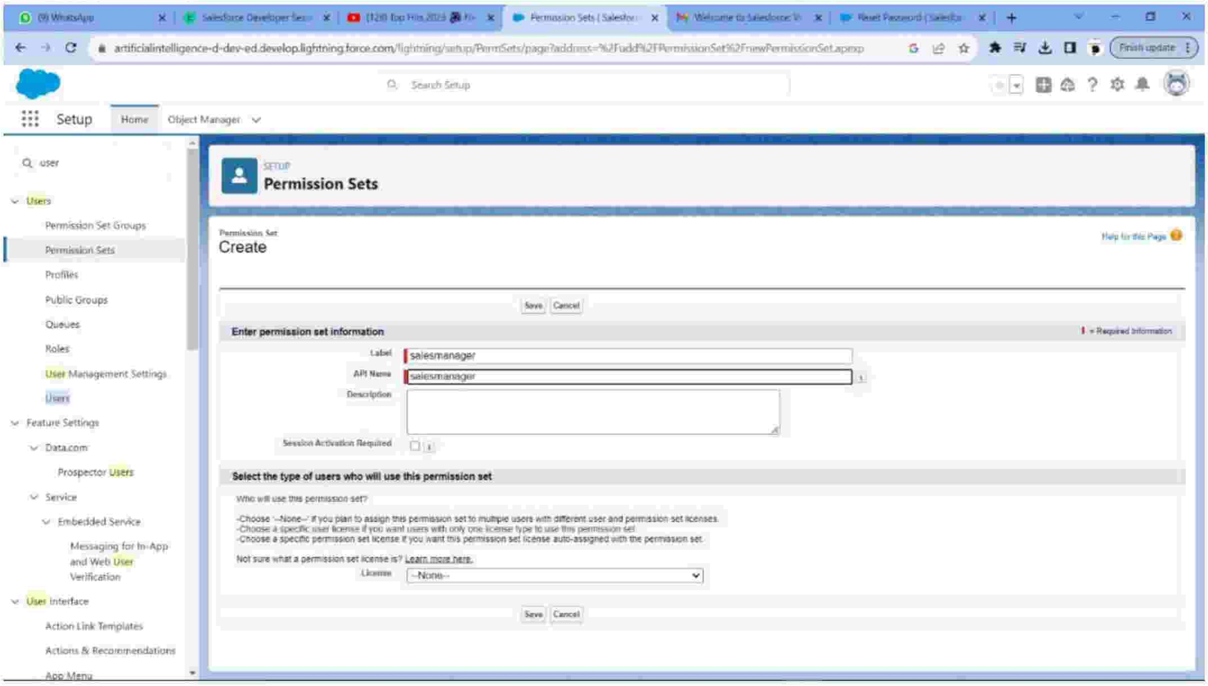
A, and records owned by User B are shared with User B.

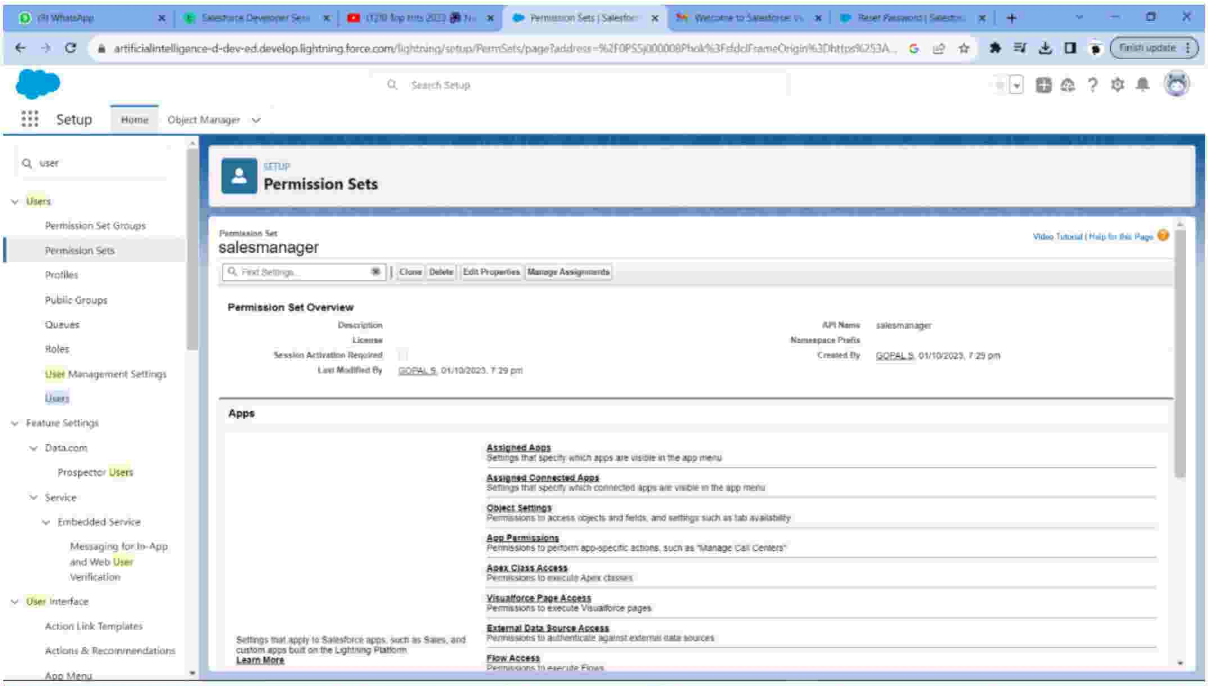
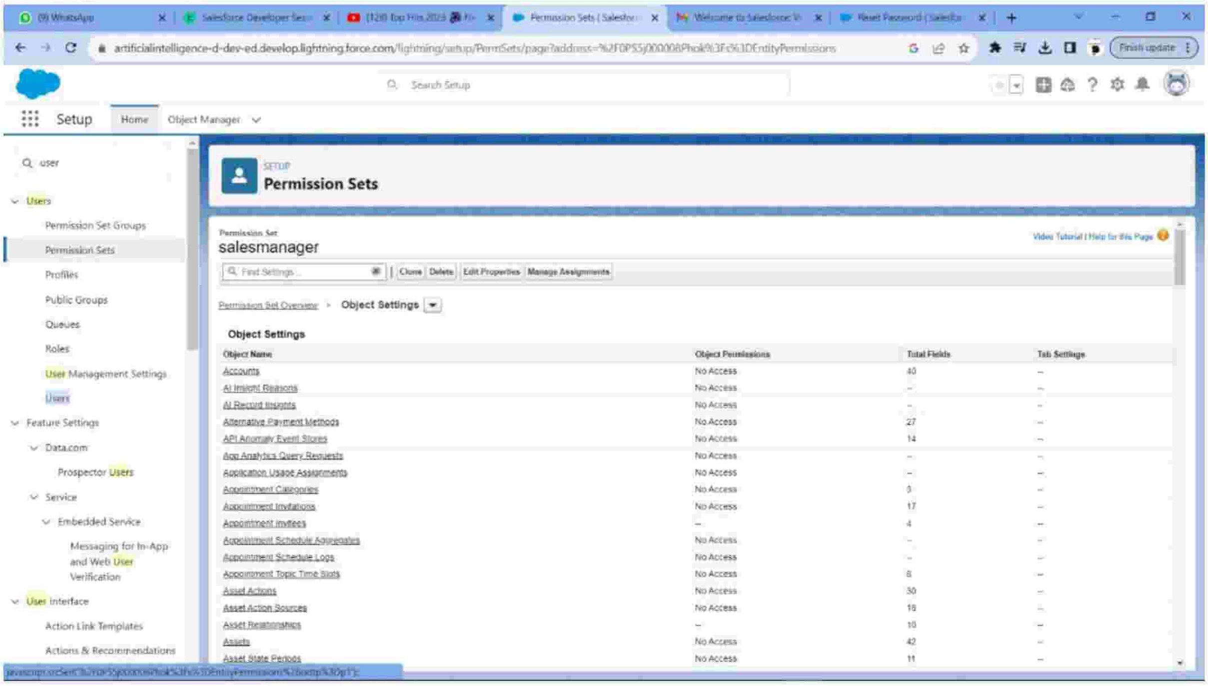
Ownership:

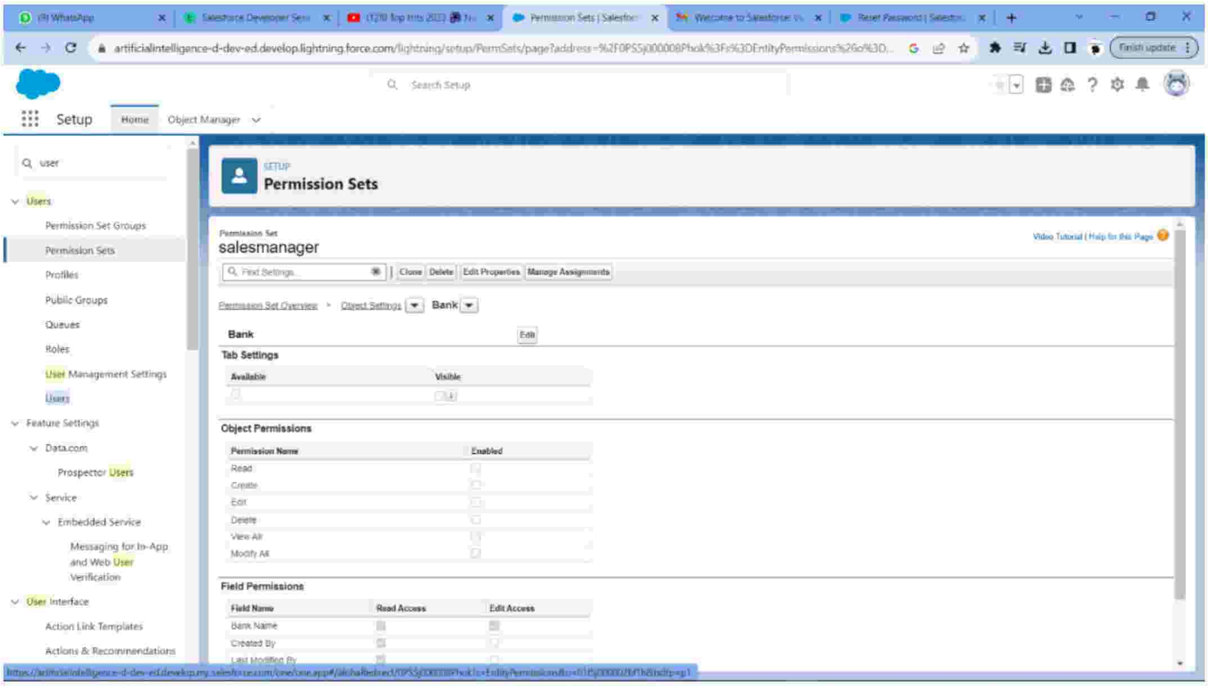
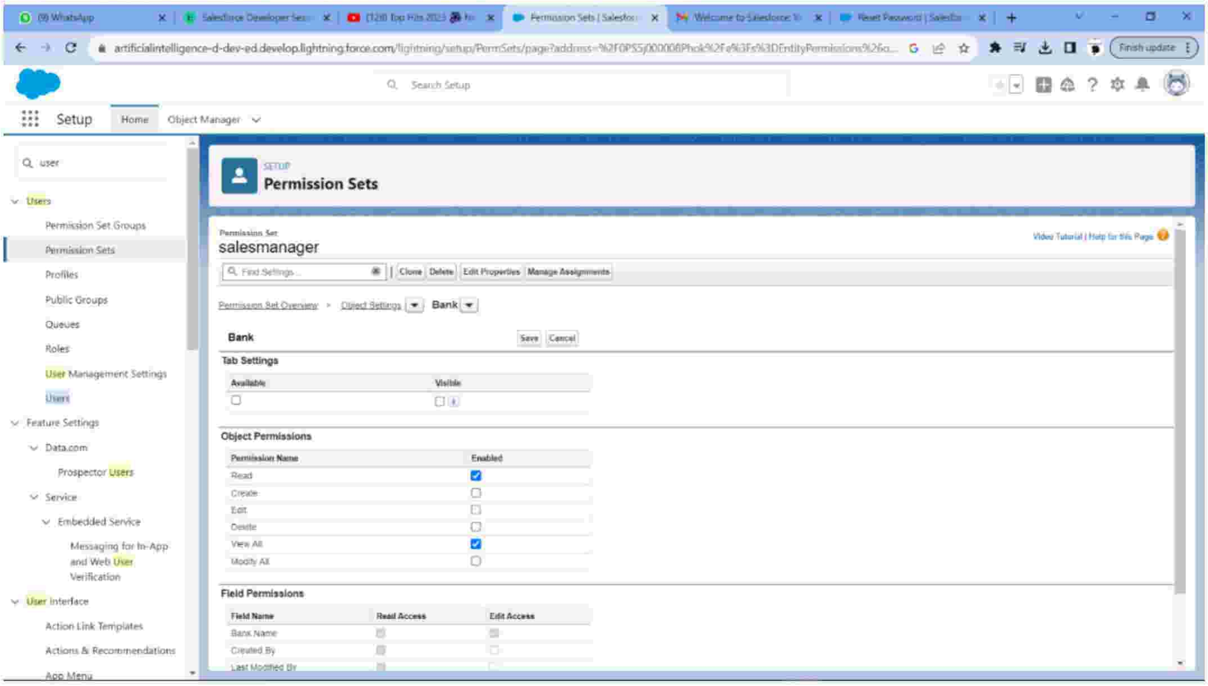
• Ensure that the Account records are owned by the respective users, with User A owning
their records and User B owning their records.
Organization-Wide Defaults:
• Set the organization-wide defaults for the Account object to "Private" to ensure that
records are private by default.
Testing:
• Test the setup by logging in as User A and User B separately to verify that they cannot
access each other's records.

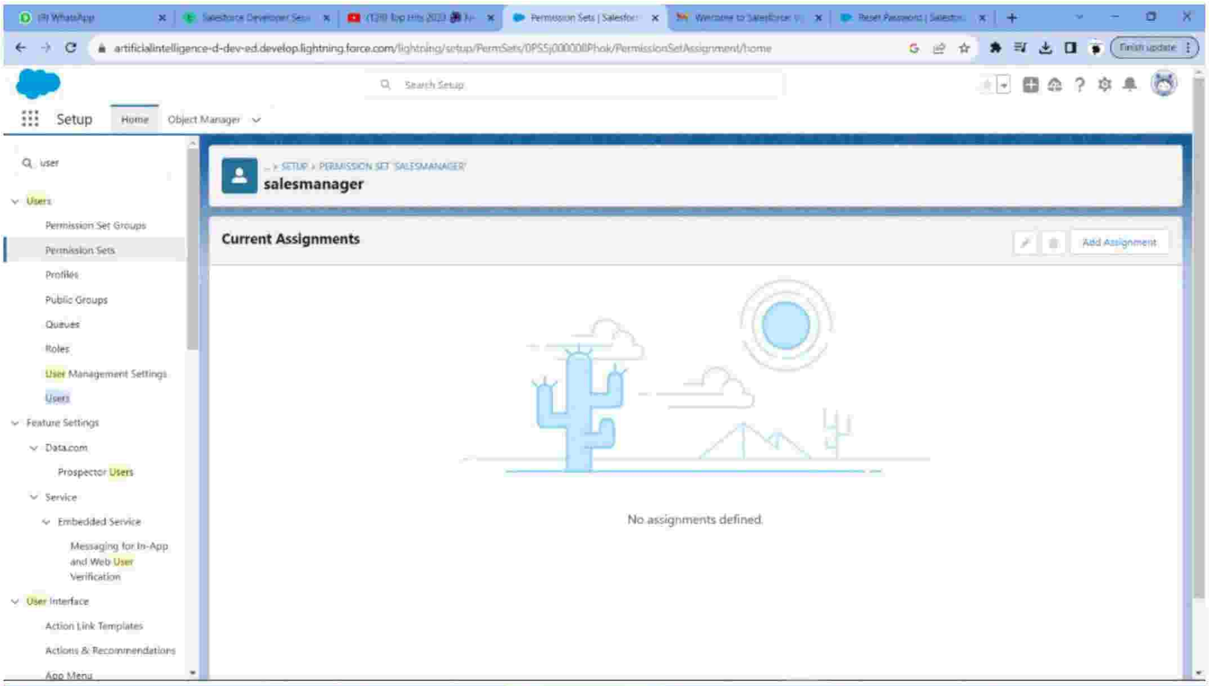


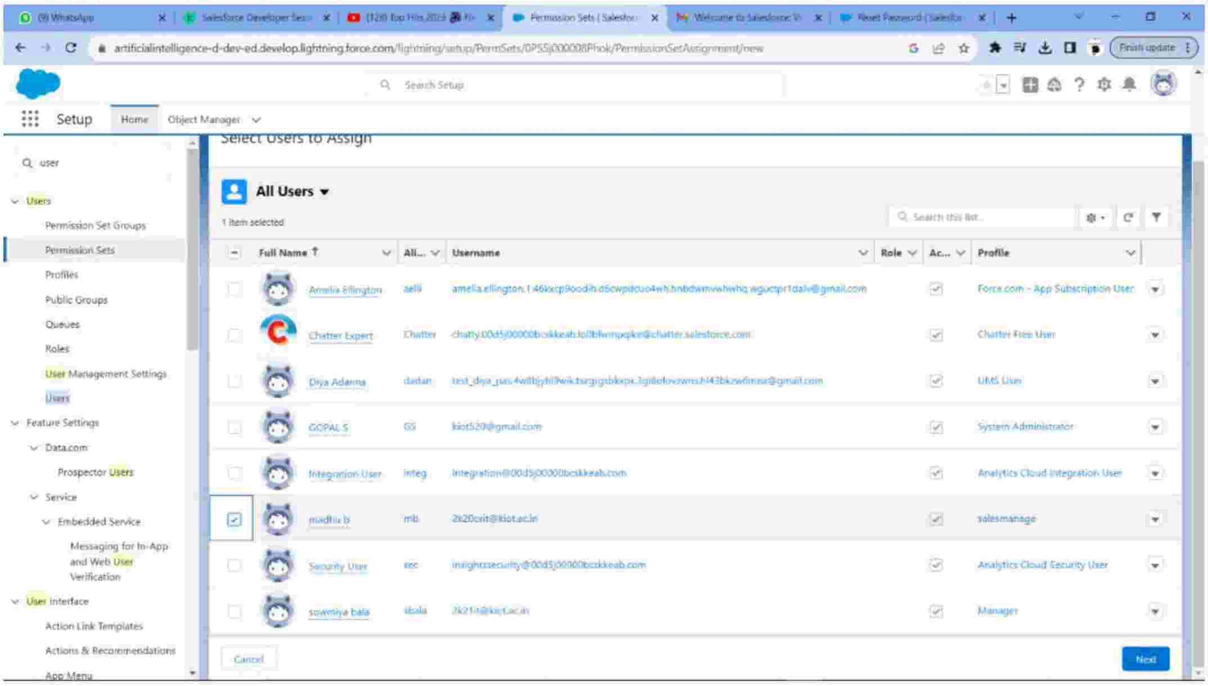

Setup
Home
Object Manager
Permission Sets
Permission Set
Create
Save
Cancel
Enter permission set information
Label
API Name
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
License
--None--

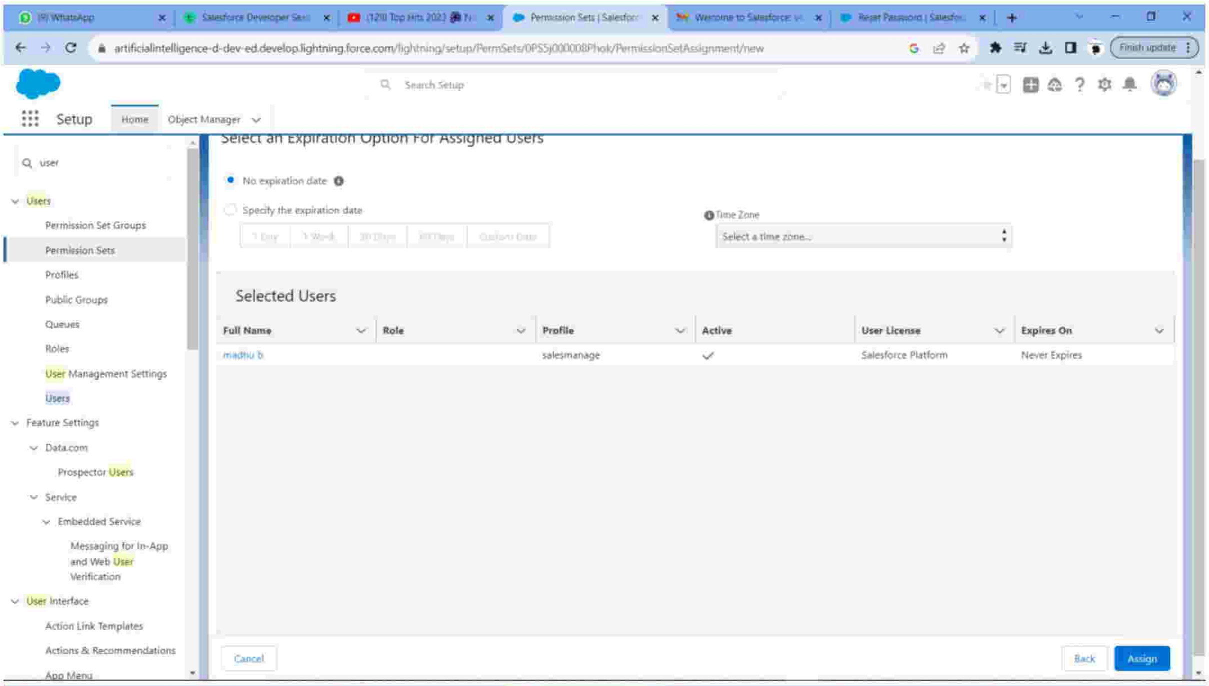

Setup
Home
Object Manager
Permission Sets
Permission Set
Create
Save
Cancel
Enter permission set information
Label
salesmanager
API Name
salesmanager
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
License
--None--


Setup
Home
Object Manager
Permission Sets
Permission Set
salesmanager
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By
API Name
salesmanager
Namespace Prefix
Created 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
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
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
User Interface

Setup
Home
Object Manager
Permission Sets
Permission Set
salesmanager
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Object Settings
Object Name
Object Permissions
Total Fields
Tab Settings
Accounts
Alternative Payment Methods
Appointment Categories
Appointment Invitations
Asset Actions
Asset Relationships
Assets
No Access

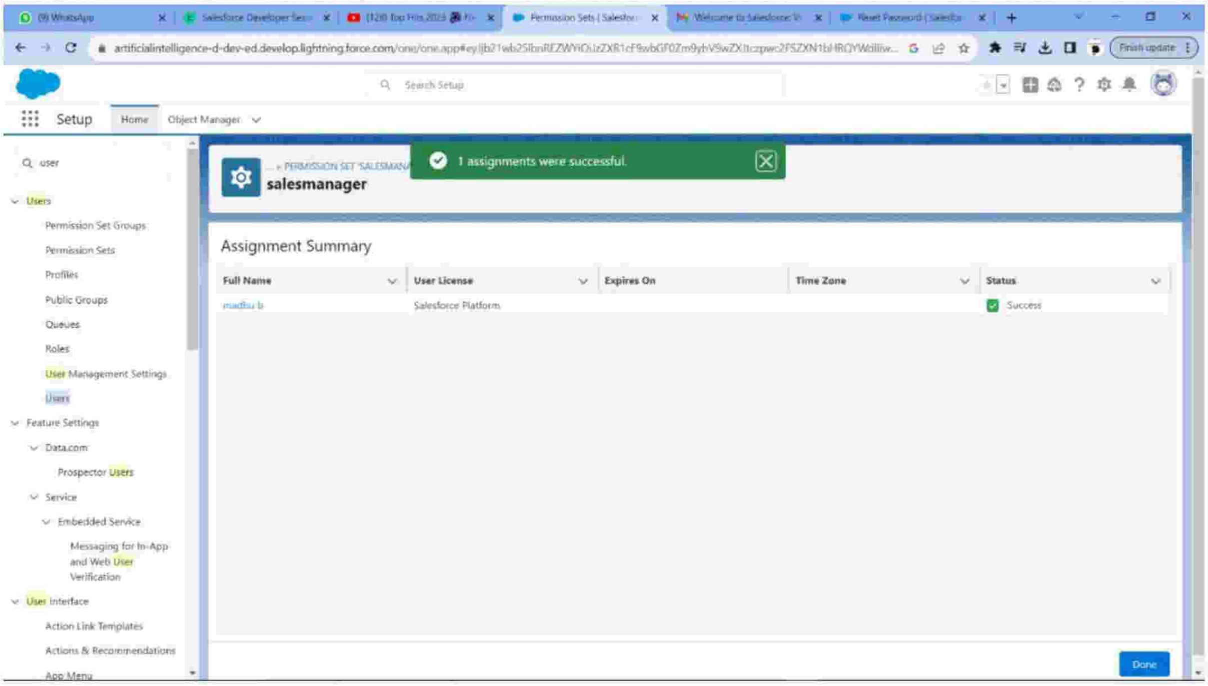

Setup
Home
Object Manager
SETUP
Permission Sets
Permission Set
salesmanager
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Object Settings
Bank
Bank
Edit
Tab Settings
Available
Visible
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Bank Name
Created By
Last Modified By
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations

Setup
Home
Object Manager
SETUP
Permission Sets
Permission Set
salesmanager
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Object Settings
Bank
Bank
Save
Cancel
Tab Settings
Available
Visible
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Bank Name
Created By
Last Modified By
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu


salesmanager
Current Assignments
Add Assignment
No assignments defined.

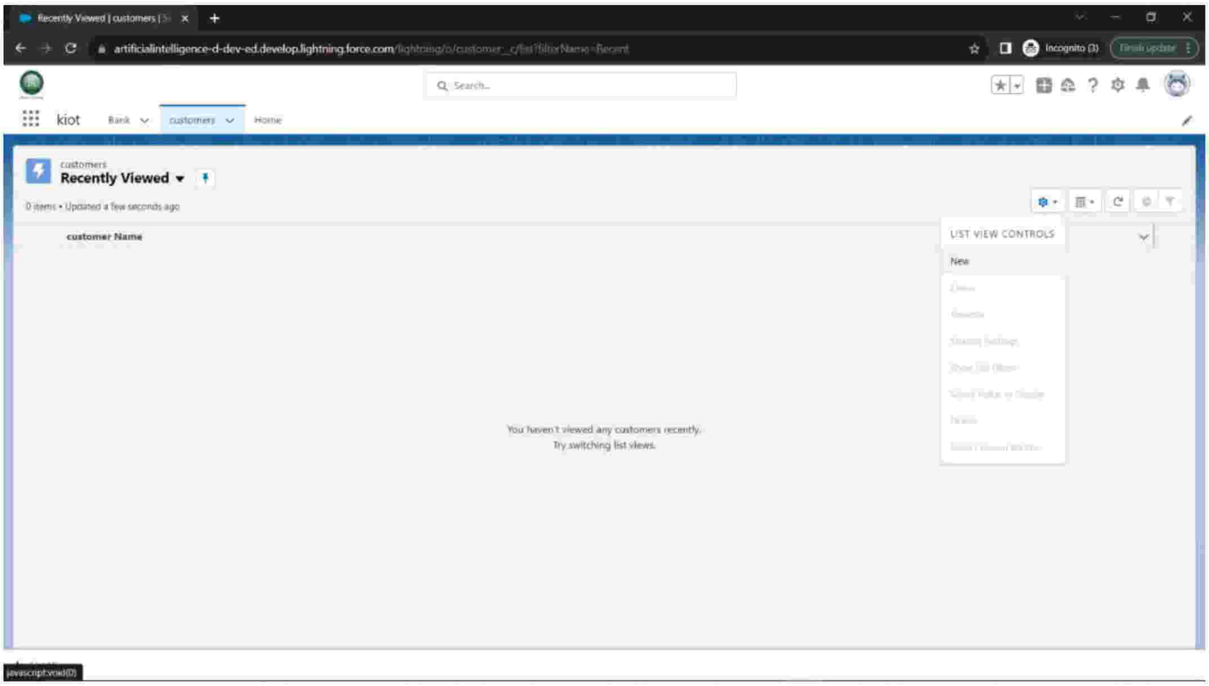

Select Users to Assign
All Users
1 item selected
Full Name
Username
Role
Profile
Cancel
Next



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
salesmanage
Salesforce Platform
Never Expires
Cancel
Back
Assign



Setup
Home
Object Manager
1 assignments were successful.
salesmanager
Assignment Summary
Full Name
User License
Expires On
Time Zone
Status
madhu b
Salesforce Platform
Success
Done

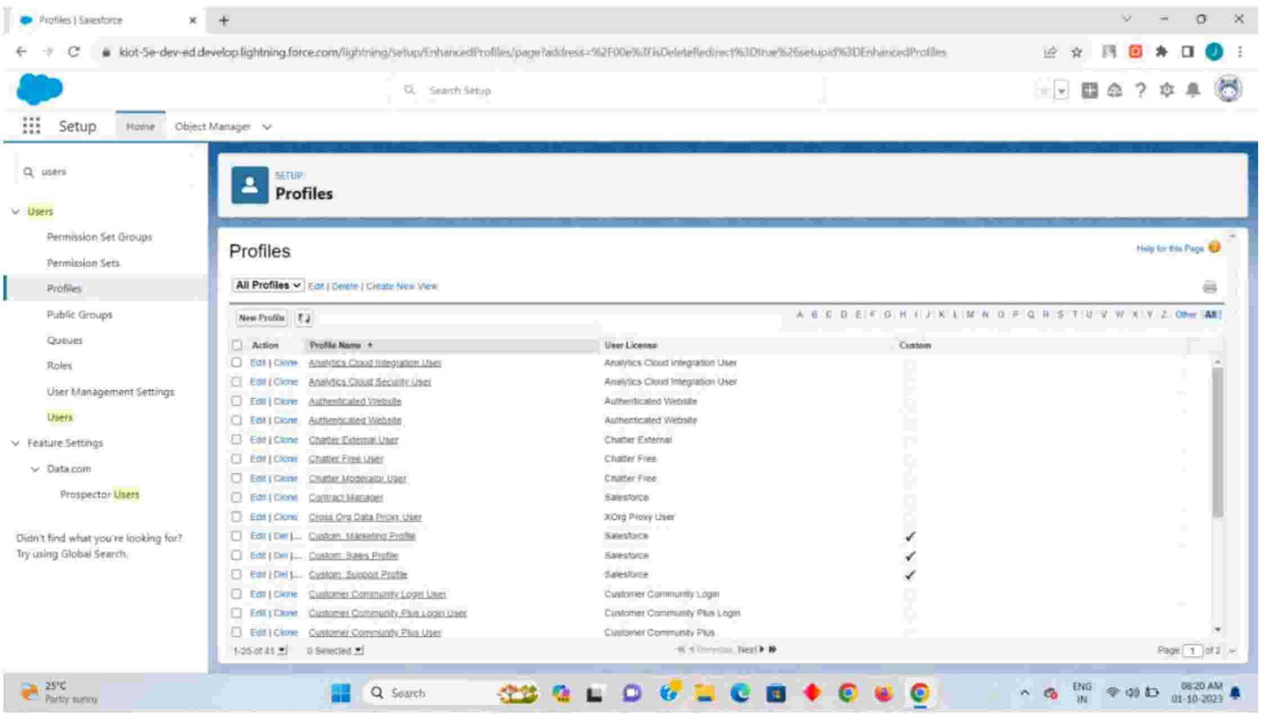

Recently Viewed | customers
artificialintelligence-d-dev-ed.develop.lightning.force.com
Search...
kiot
Bank
customers
Home
customers
Recently Viewed
0 items • Updated a few seconds ago
customer Name
LIST VIEW CONTROLS
New
You haven't viewed any customers recently.
Try switching list views.
javascript:void(0)

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:

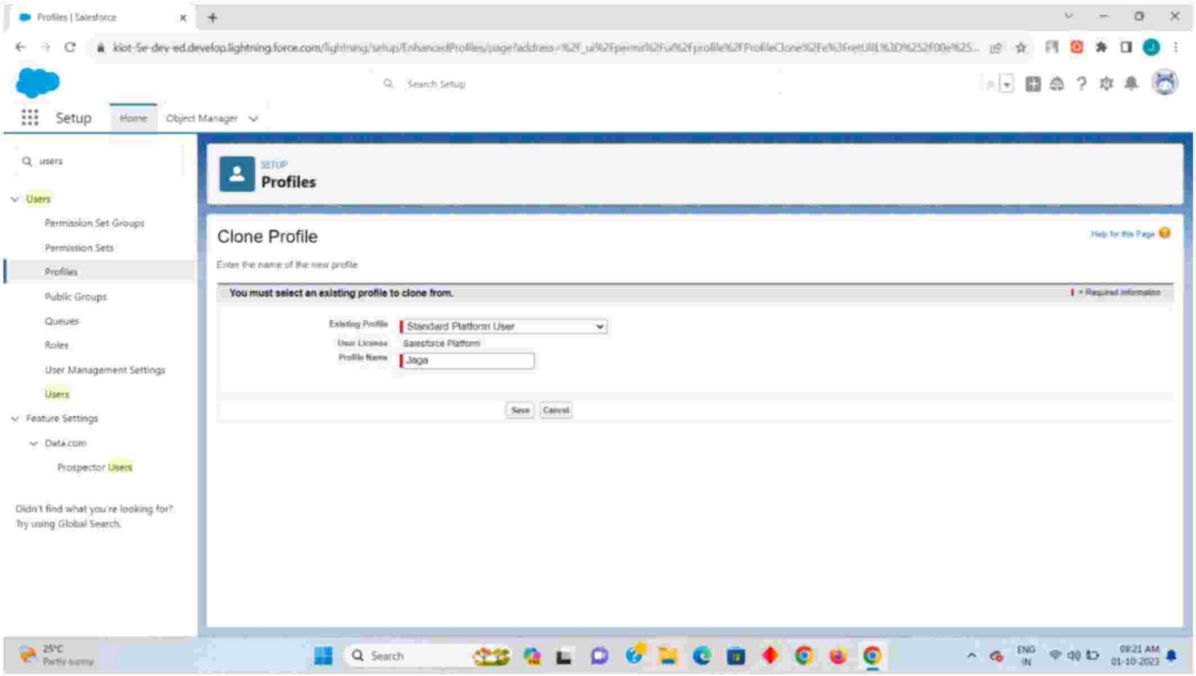
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

<u>Setup-quick search[profile]</u>



Step 2:

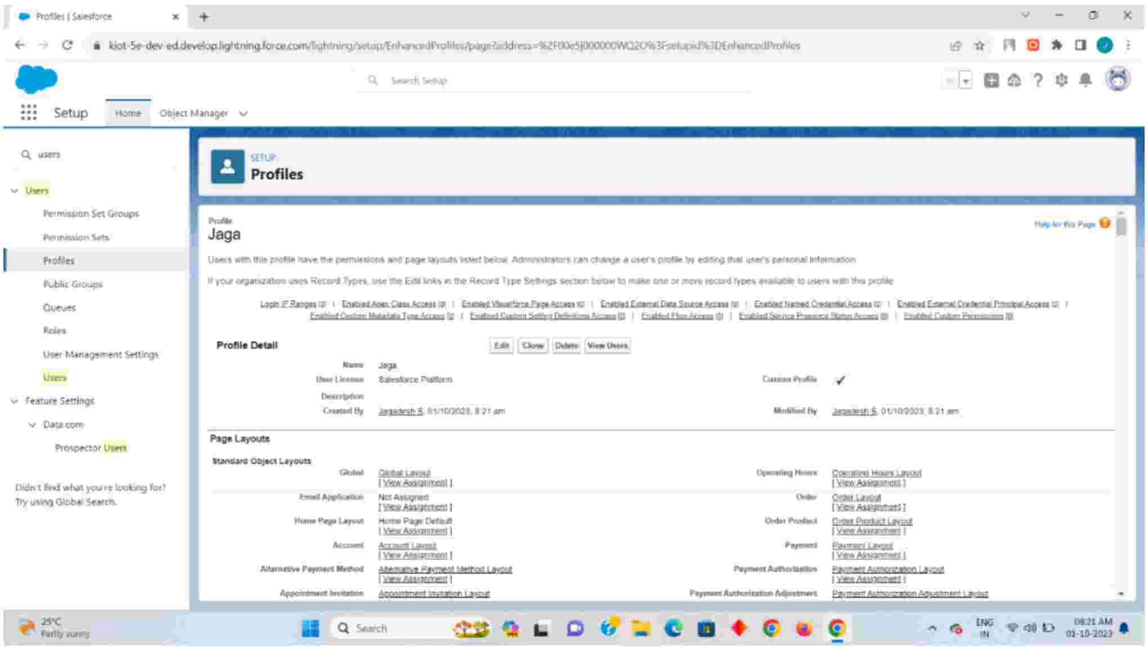
Click on the new to create a new profile along with the label and Api

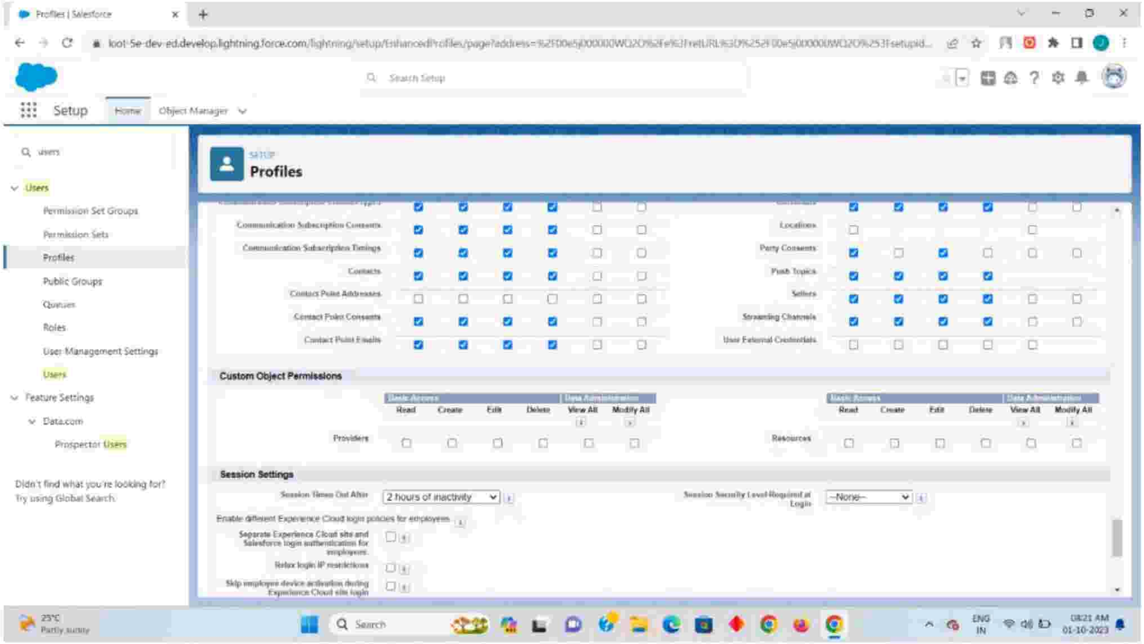


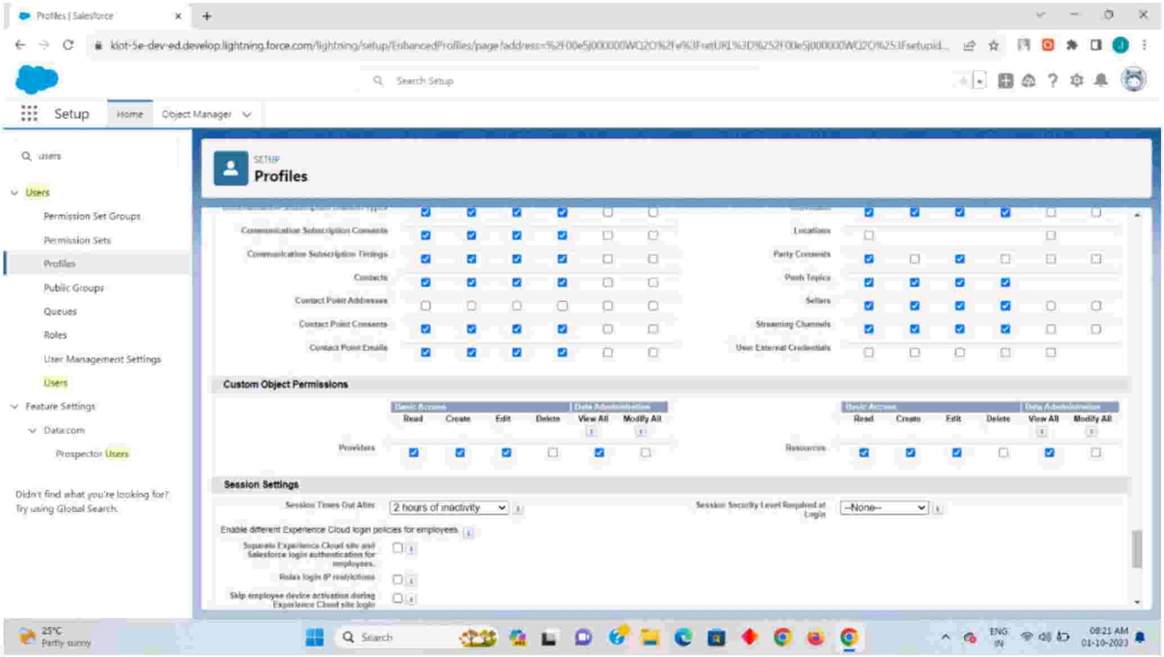
Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.

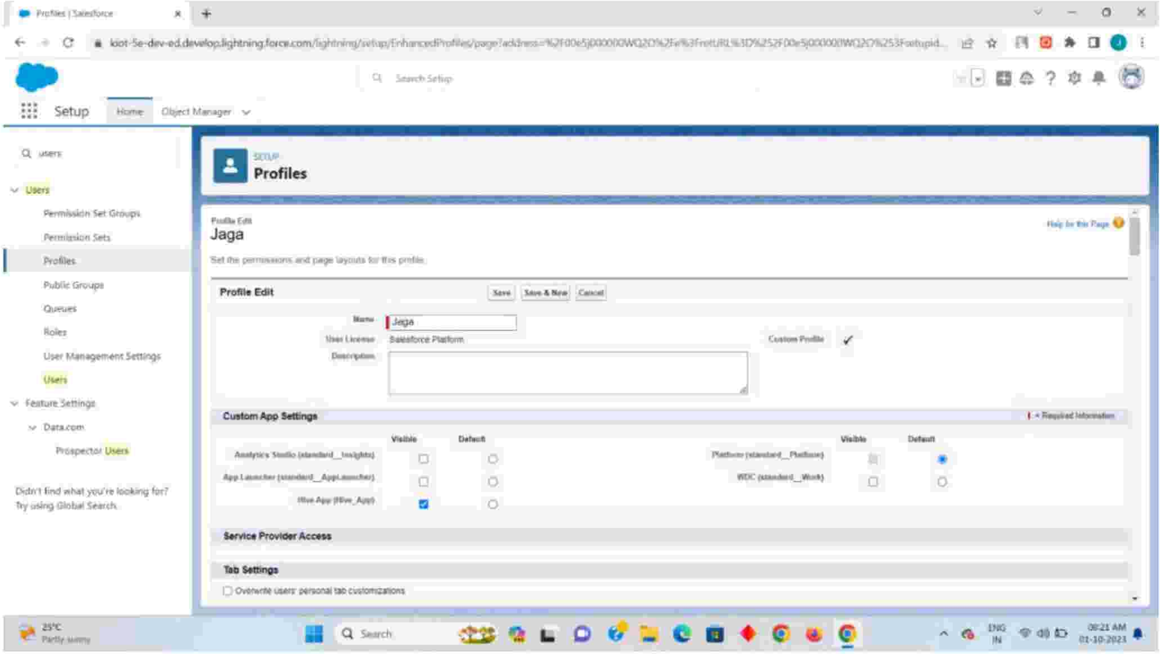
Step 3:

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



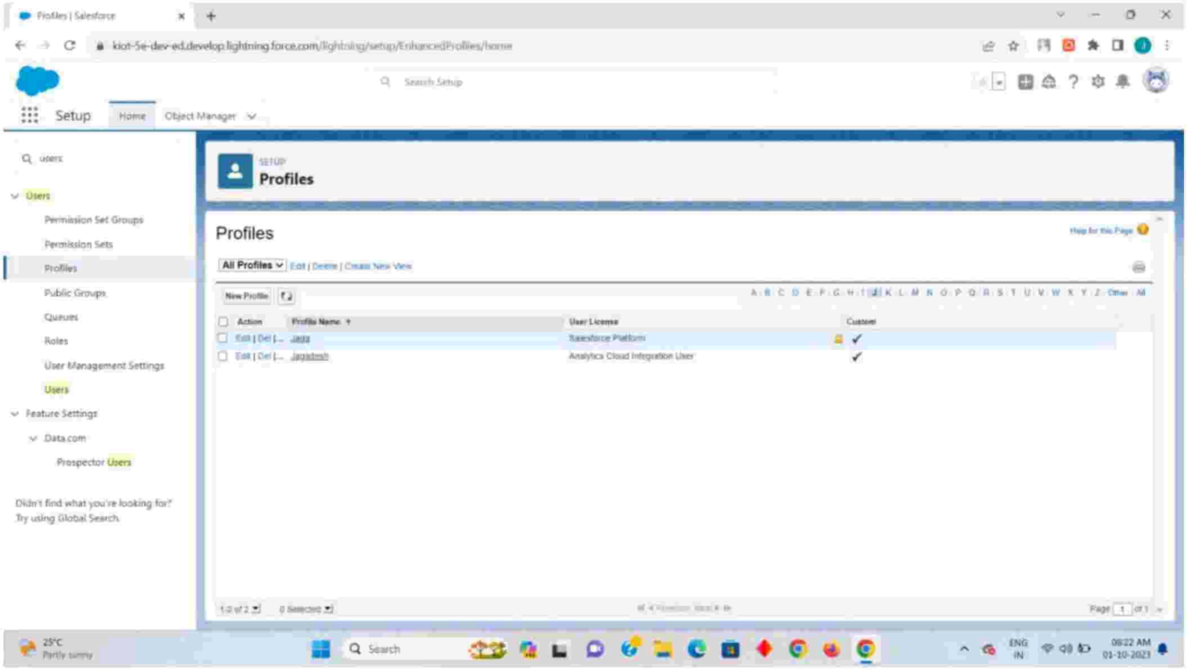

Profiles | Salesforce
Setup
Home
Object Manager
Search Setup
Profiles
Permission Set Groups
Permission Sets
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.
Communication Subscription Consents
Communication Subscription Timings
Contacts
Contact Point Addresses
Contact Point Consents
Contact Point Emails
Locations
Party Consents
Push Topics
Sellers
Streaming Channels
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Providers
Resources
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Enable different Experience Cloud login policies for employees
Relax login IP restrictions


Profiles | Salesforce
Setup
Home
Object Manager
Search Setup
Profiles
Permission Set Groups
Permission Sets
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.
Communication Subscription Consents
Communication Subscription Timings
Contacts
Contact Point Addresses
Contact Point Consents
Contact Point Emails
Locations
Party Consents
Push Topics
Sellers
Streaming Channels
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Providers
Resources
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Enable different Experience Cloud login policies for employees
Relax login IP restrictions



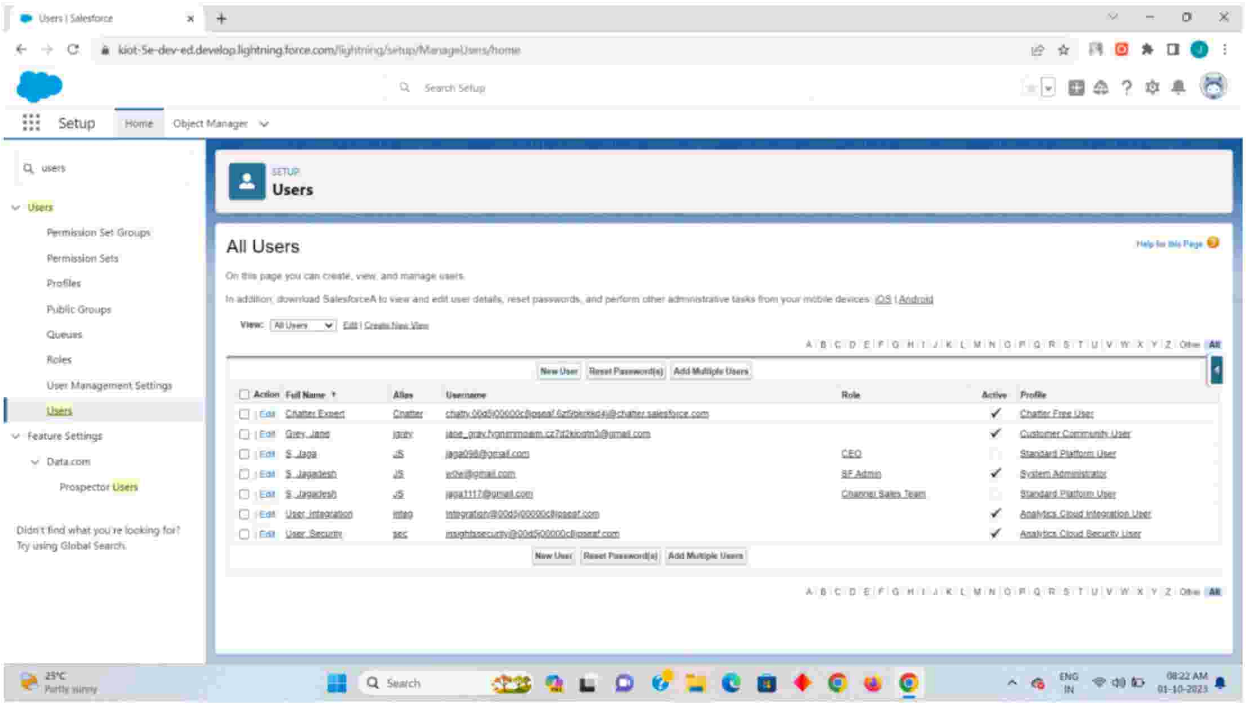
Step 4

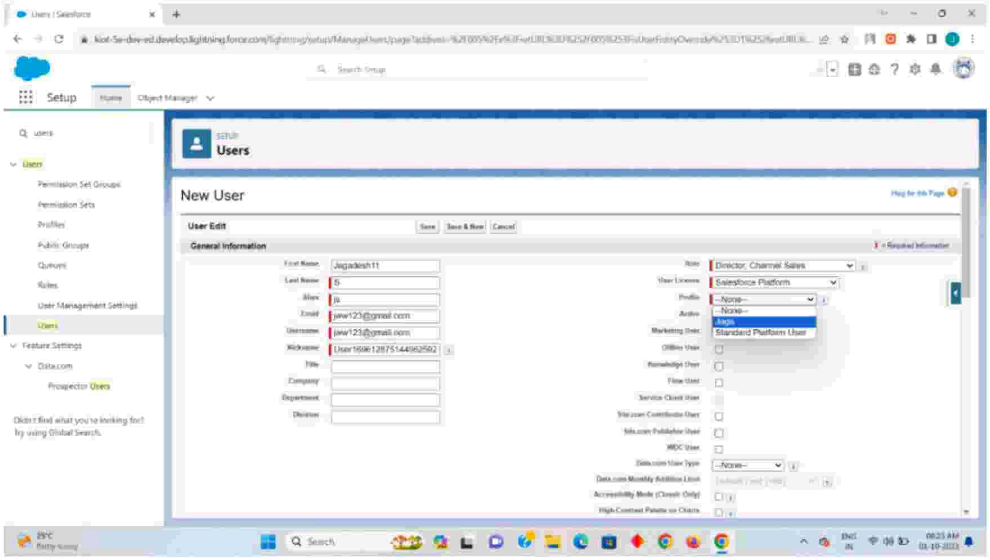
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it

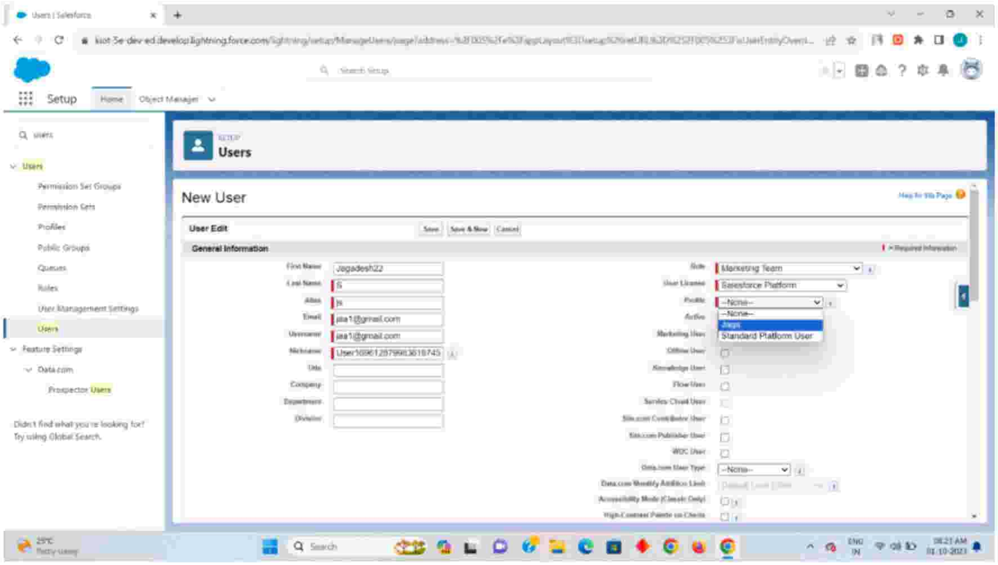


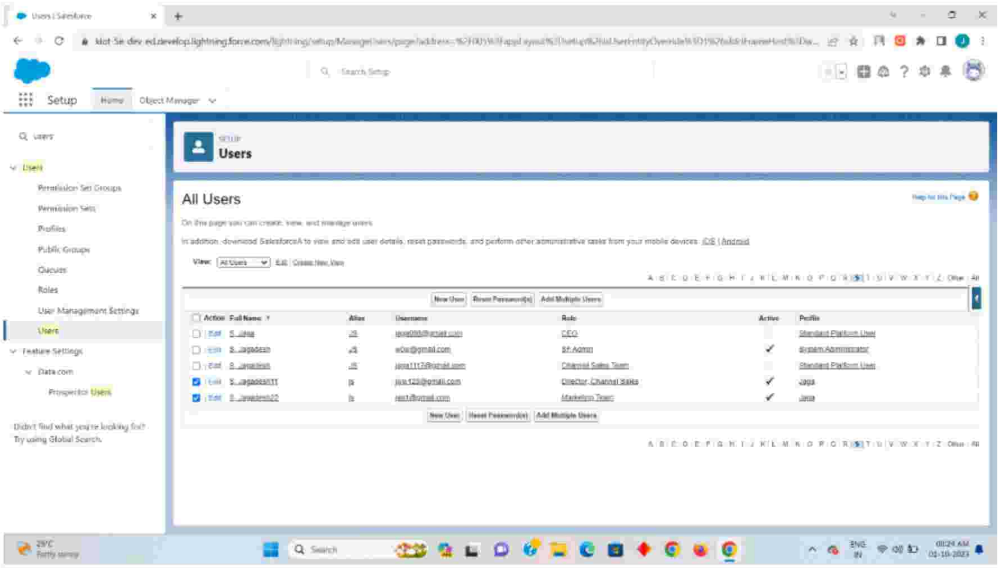
Step 5:

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 been created with alternate name but with the same user profile and once the two user are create click on save.




Users | Salesforce
Setup
Home
Object Manager
Users
New User
User Edit
Save
Save & New
Cancel
General Information
First Name
Jagadesh11
Last Name
S
Alias
js
Email
jsnw123@gmail.com
Username
jsnw123@gmail.com
Role
Director, Channel Sales
User License
Salesforce Platform
Profile
--None--
Jaga
Standard Platform User
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.


Users | Salesforce
Setup
Home
Object Manager
Users
New User
User Edit
Save
Save & New
Cancel
General Information
First Name
Jagadesh22
Last Name
S
Alias
js
Email
jaa1@gmail.com
Username
jaa1@gmail.com
Role
Marketing Team
User License
Salesforce Platform
Profile
--None--
Jaga
Standard Platform User
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.

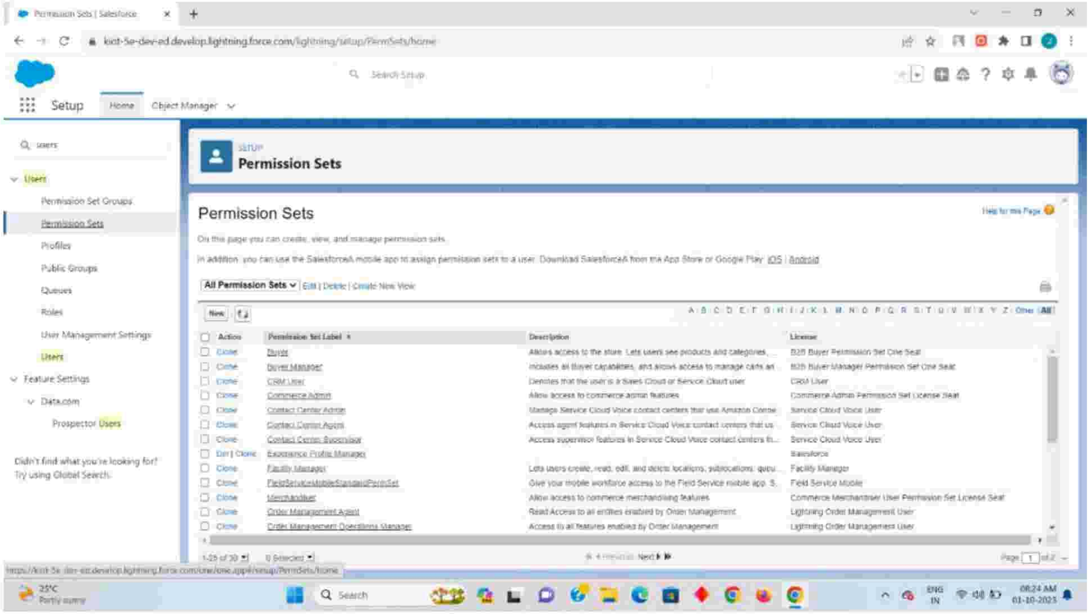

Users | Salesforce
Setup
Home
Object Manager
Users
All Users
On this page you can create, view, and manage users.
View: All Users
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile
S, Jaga
CEO
Standard Platform User
S, Jagadesh
SF Admin
System Administrator
S, Jagadesh
Channel Sales Team
Standard Platform User
S, Jagadesh11
Director, Channel Sales
Jaga
S, Jagadesh22
Marketing Team
Jaga
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.

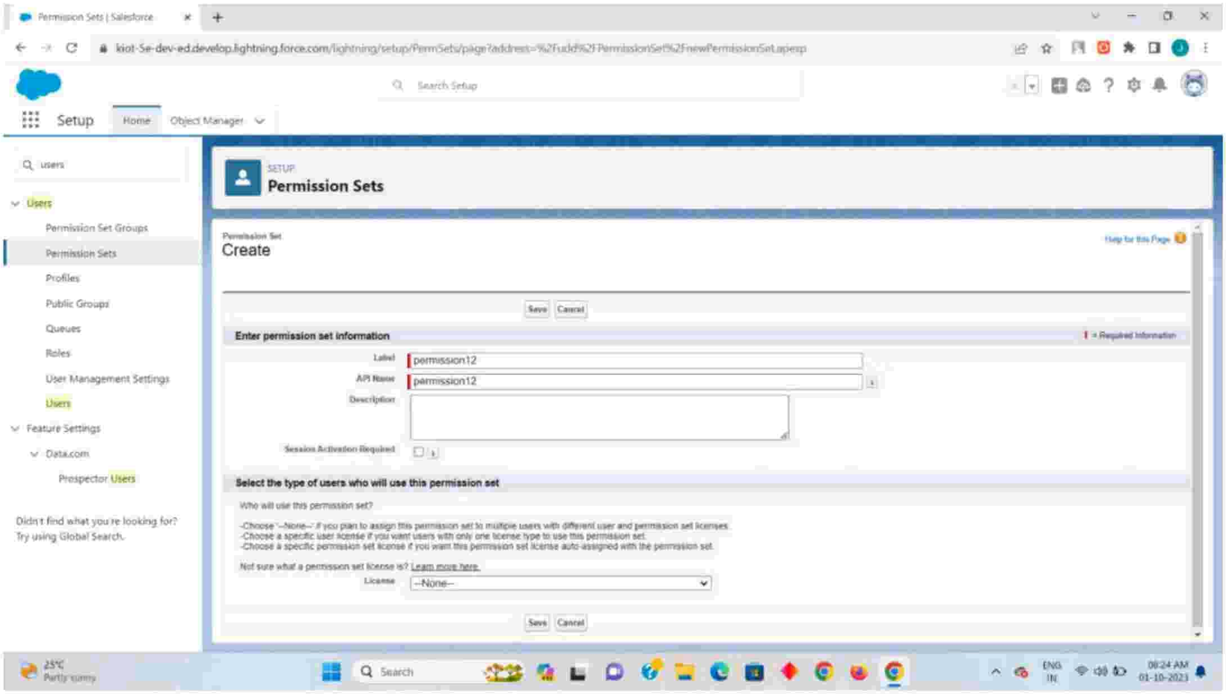
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

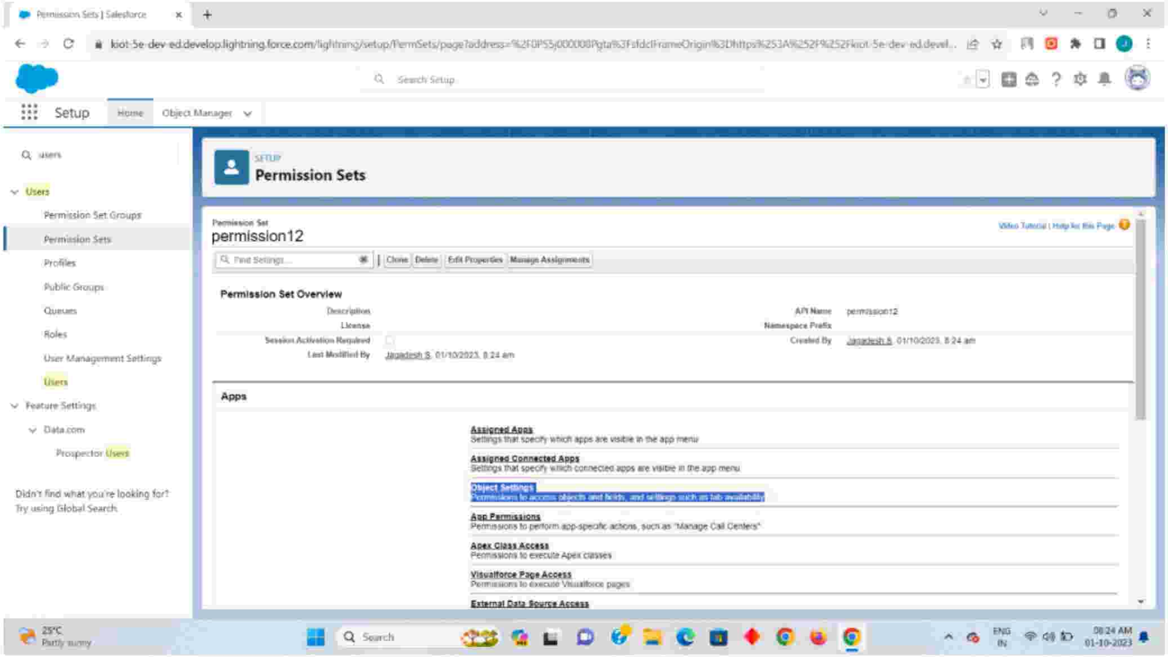
Step 6:

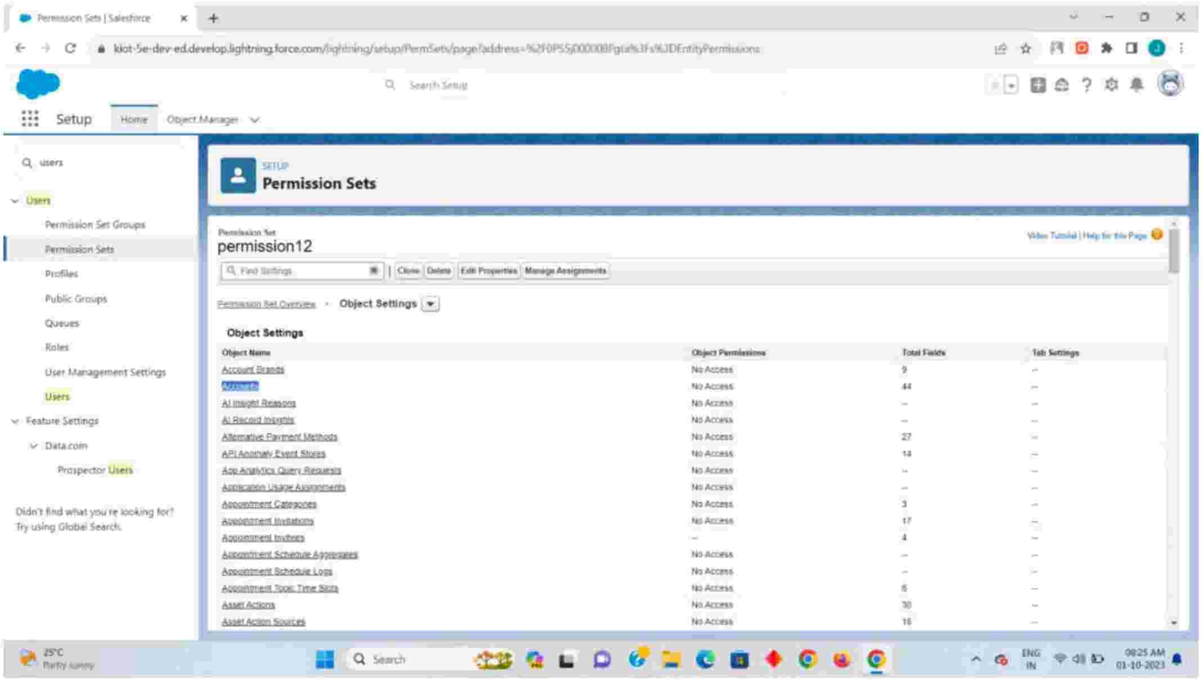
Now the two user as been created with the profle so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can created as

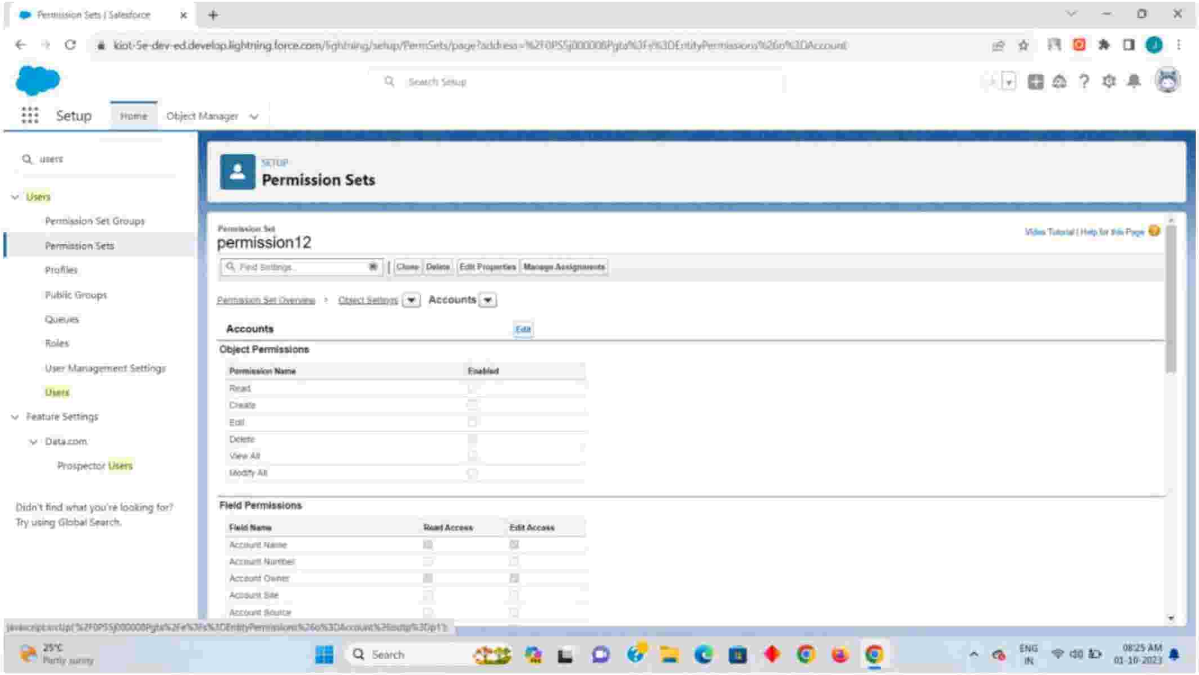
<u>setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.</u>


Permission Sets | Salesforce
Setup
Home
Object Manager
SETUP
Permission Sets
Permission Sets
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.


Permission Sets | Salesforce
Setup
Home
Object Manager
SETUP
Permission Sets
Create
Save
Cancel
Enter permission set information
Label
permission12
API Name
permission12
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
License
--None--
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.

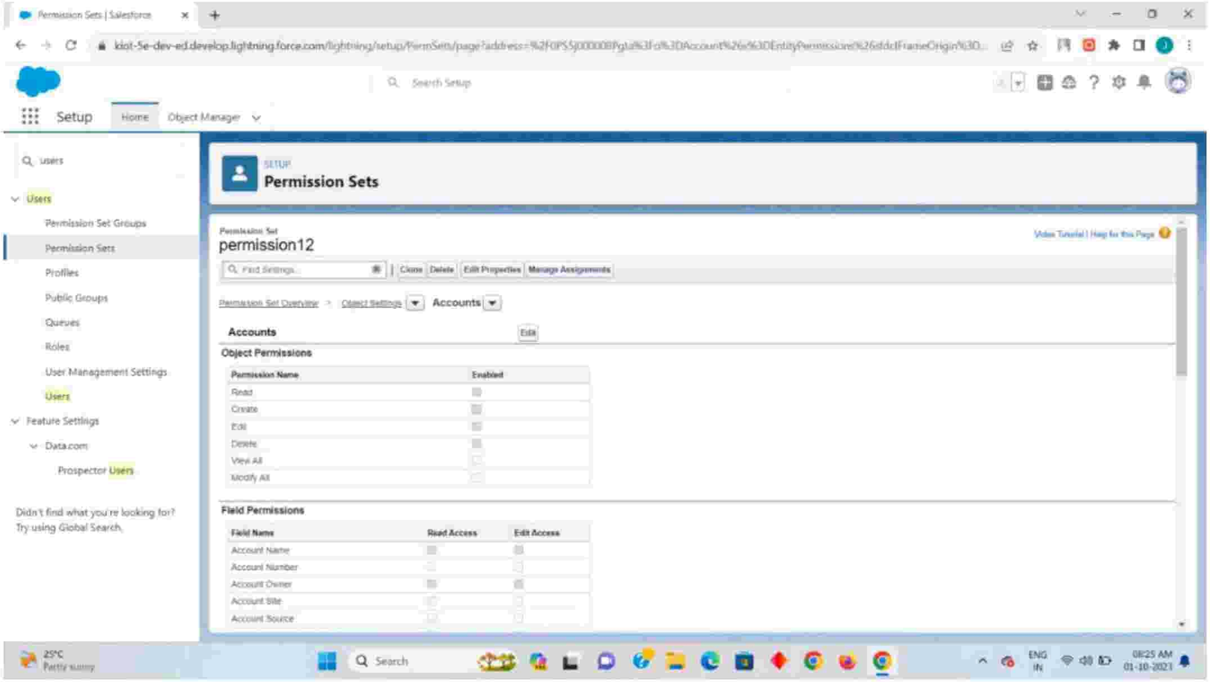

Permission Sets | Salesforce
Setup
Home
Object Manager
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.
SETUP
Permission Sets
Permission Set
permission12
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
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
Apex Class Access
Permissions to execute Apex classes
Visualforce Page Access
Permissions to execute Visualforce pages
External Data Source Access

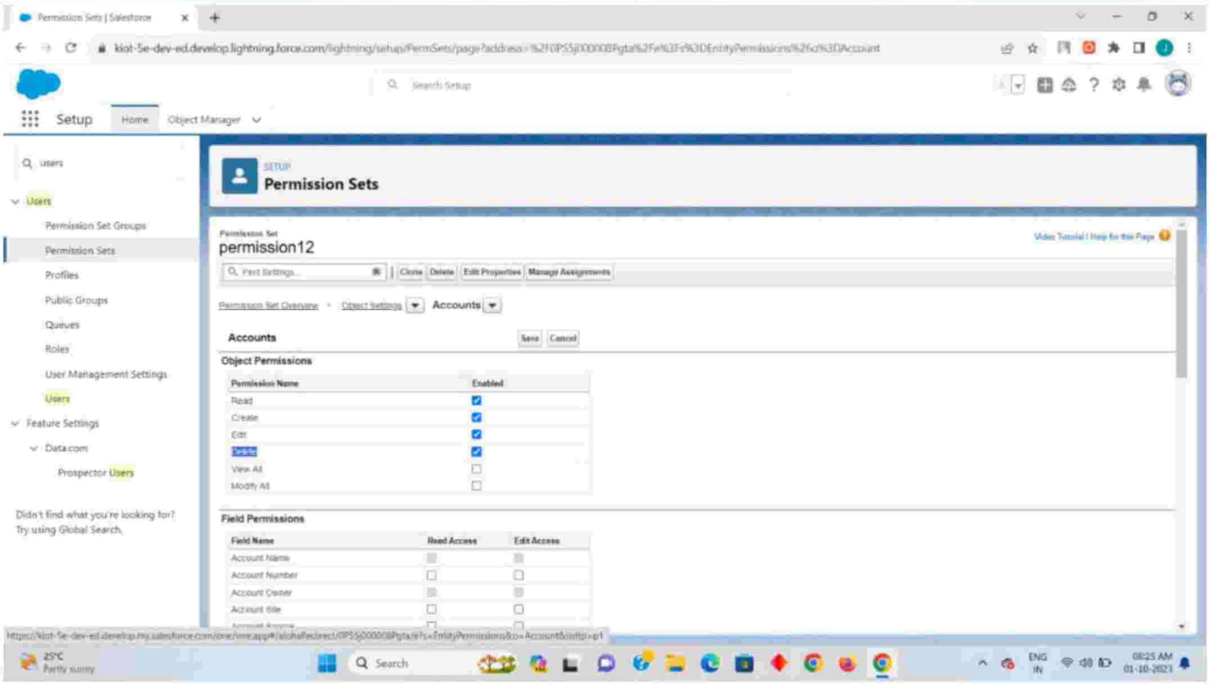

Permission Sets | Salesforce
Setup
Home
Object Manager
SETUP
Permission Sets
Permission Set
permission12
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Object Settings
Object Name
Object Permissions
Total Fields
Tab Settings
Account Brands
Accounts
AI Insight Reasons
AI Record Insights
Alternative Payment Methods
API Anomaly Event Stores
App Analytics Query Requests
Application Usage Assignments
Appointment Categories
Appointment Invitations
Appointment Invitees
Appointment Schedule Aggregates
Appointment Schedule Logs
Appointment Topic Time Slots
Asset Actions
Asset Action Sources
No Access



Step 7:

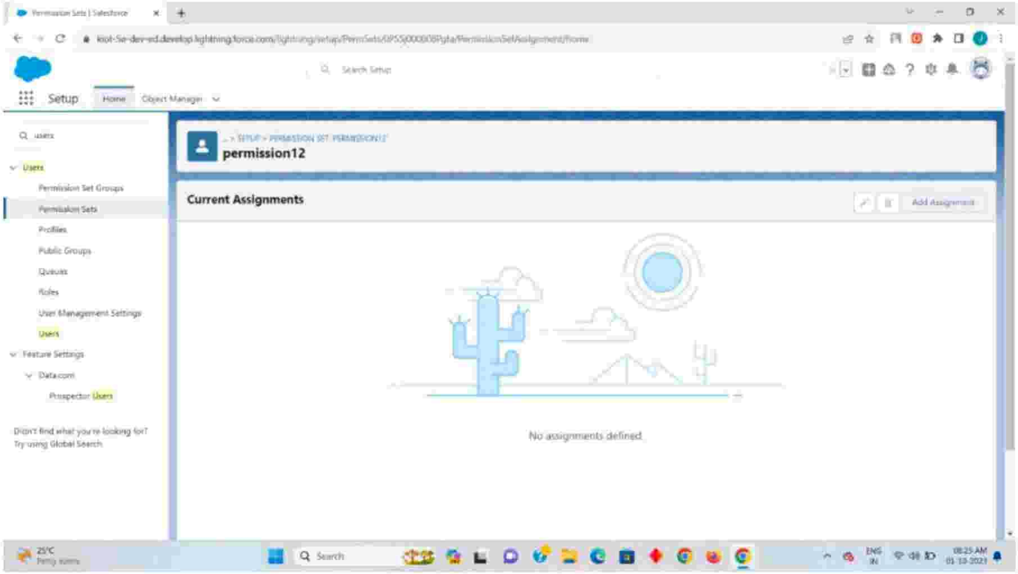
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

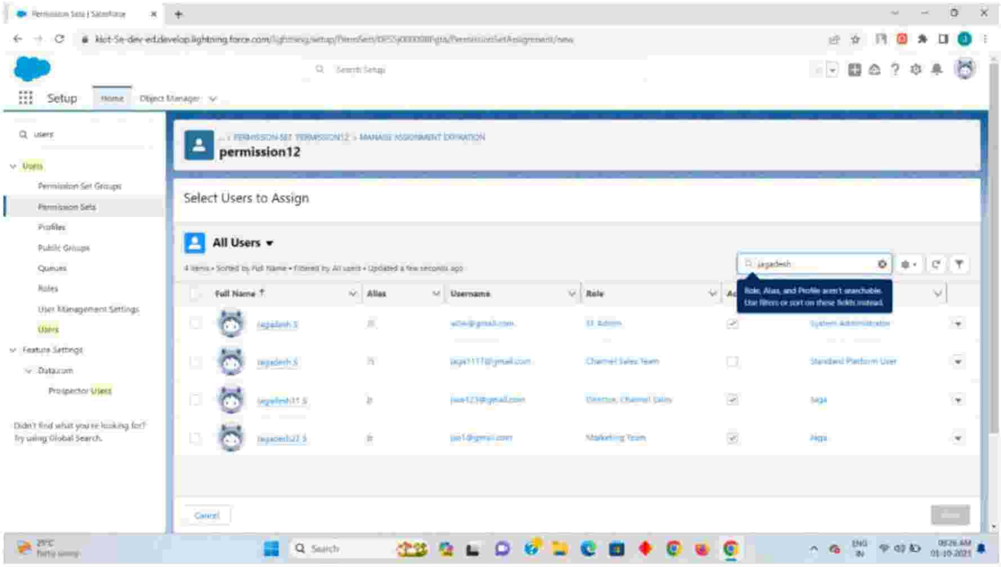


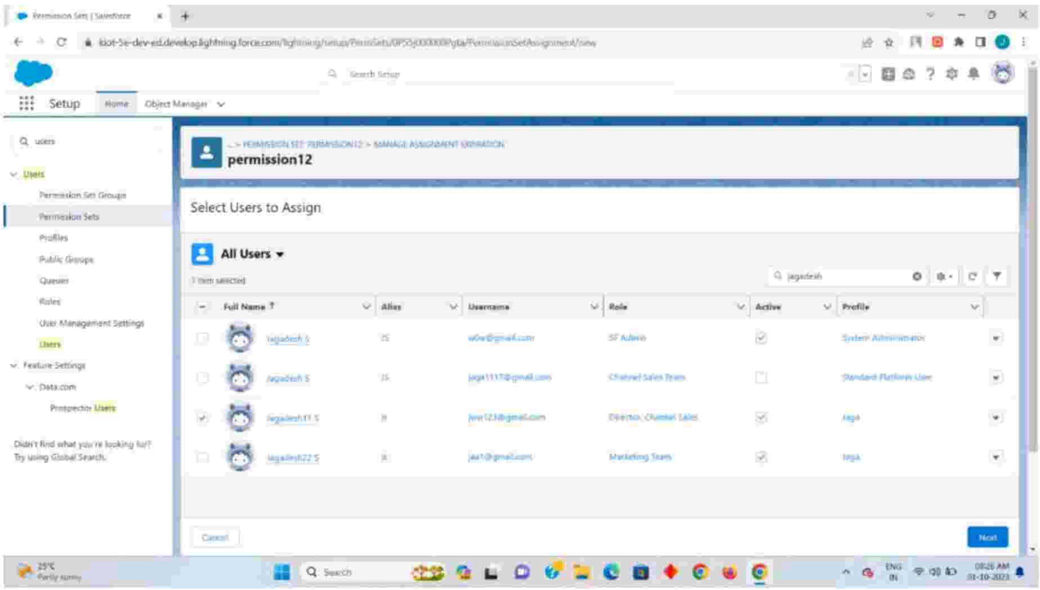


Step 8

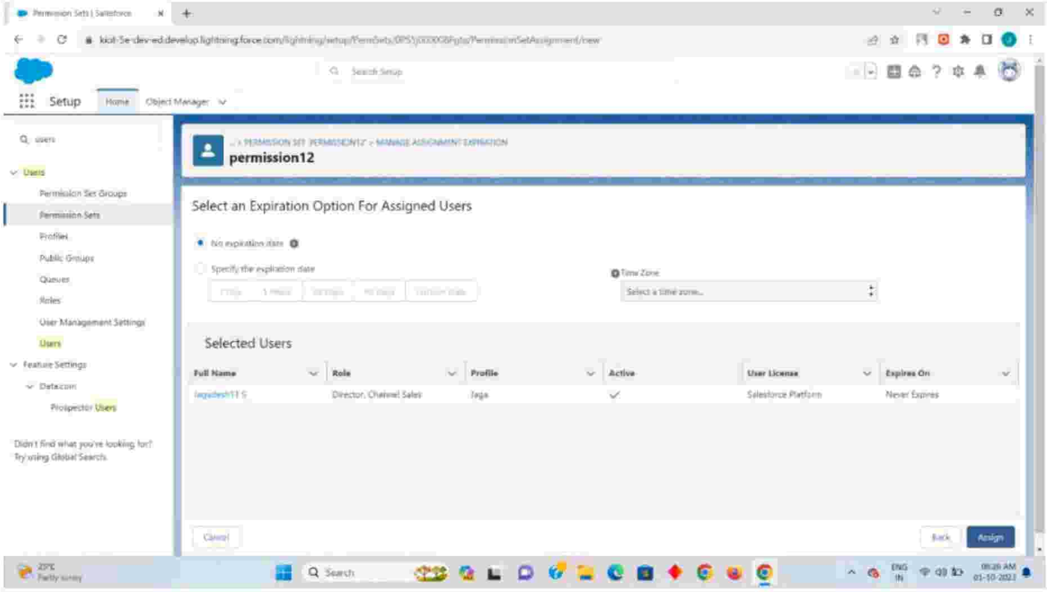
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



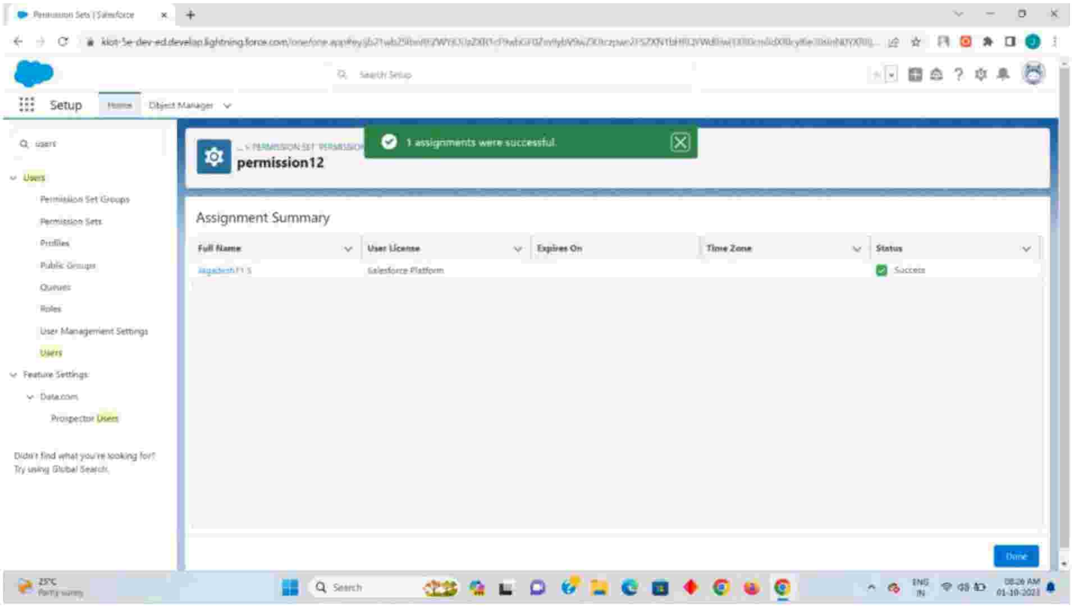




Click on next.



Now click on Assign.



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

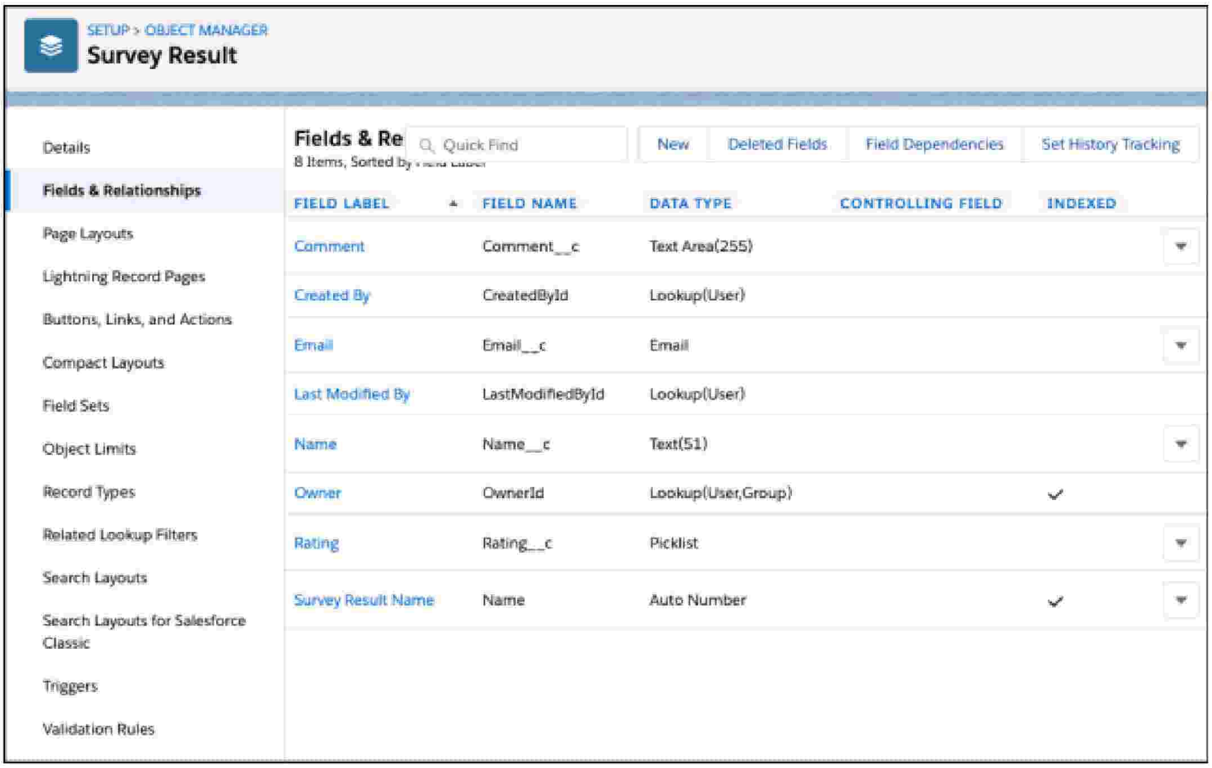
4.Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

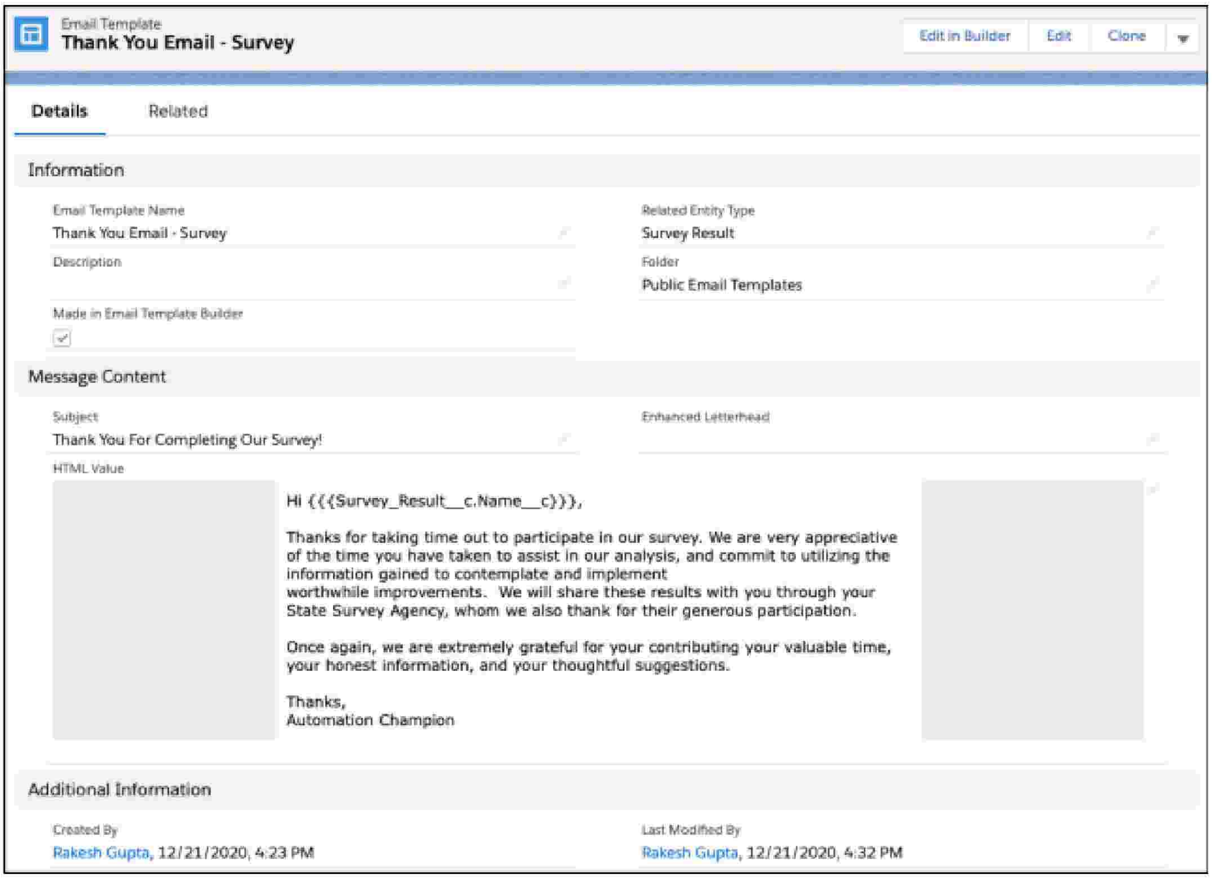
The next step is to create a custom object **Survey Result** and a few custom fields to store survey responses.

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



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

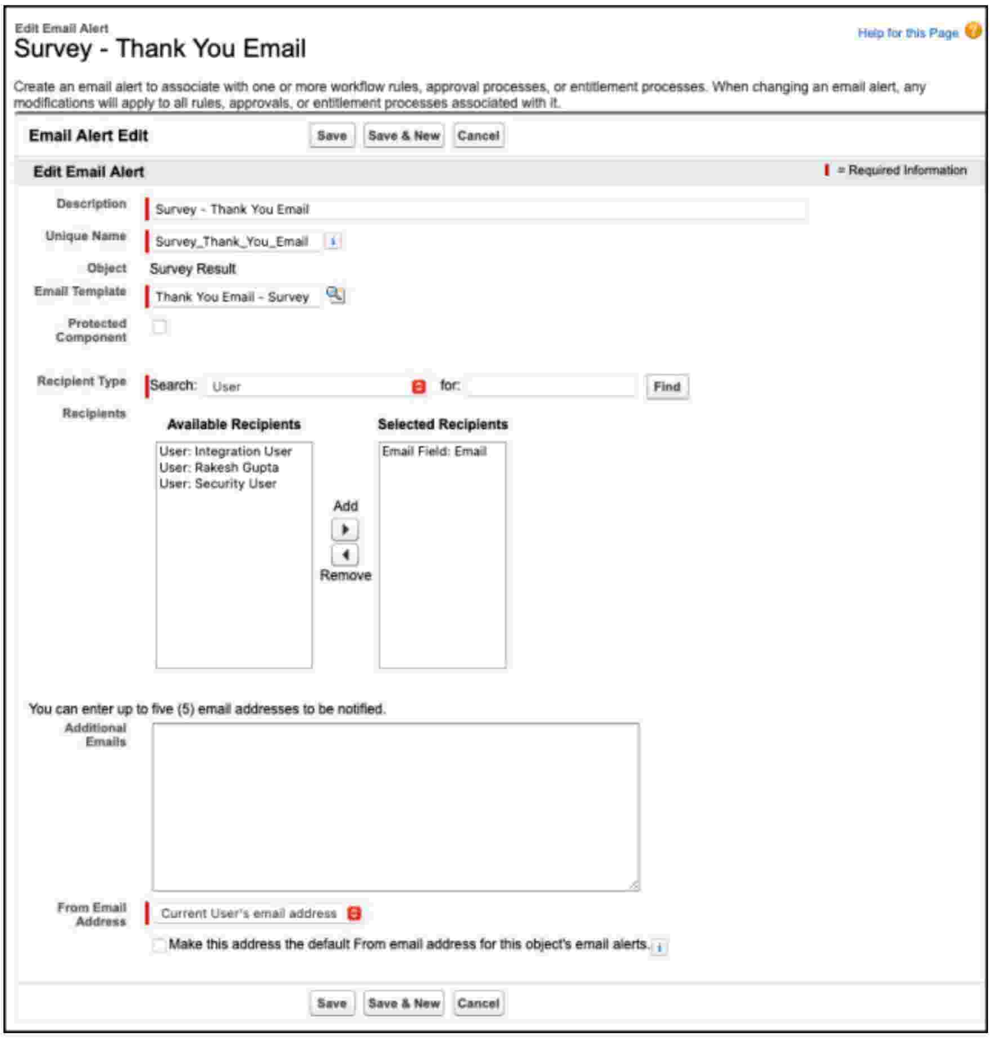
1. Click **App Launcher**.
2. In the Quick Find box, type **Email Templates**.
3. Clicks on the **New Email template** button.
4. **Name** the **Lightning Email Template** and make sure to store it in the **Public Email Templates** folder**.**
5. Create a template like the following screenshot.



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**.



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

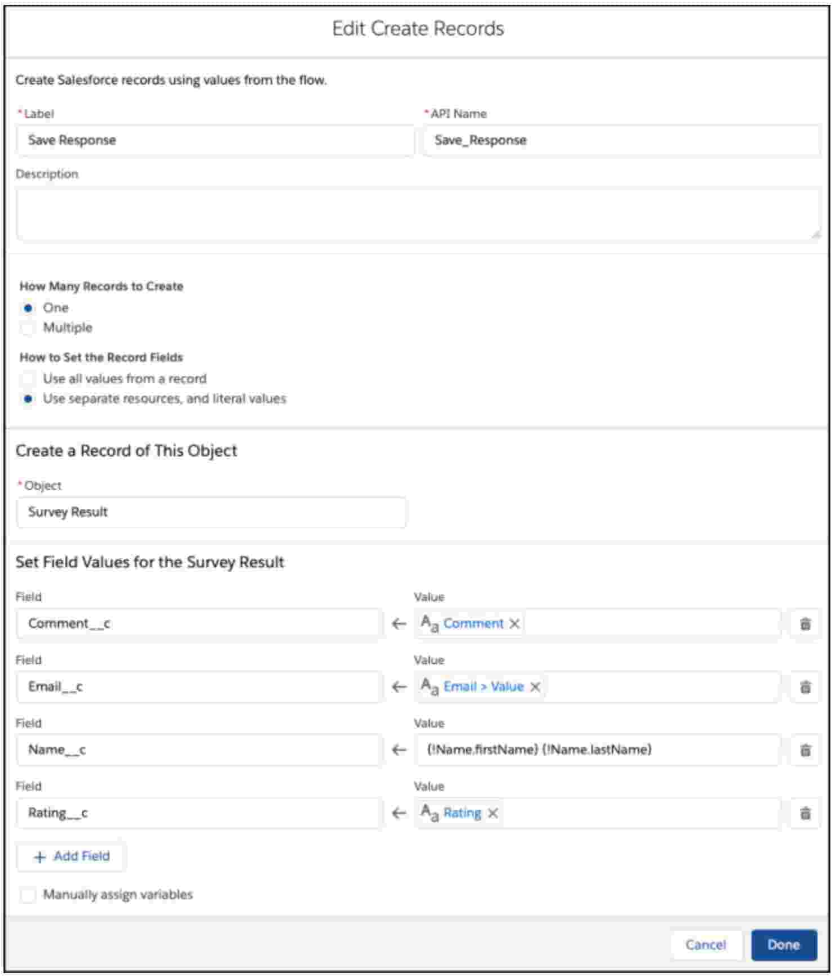
1. Click **Setup**.

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**.

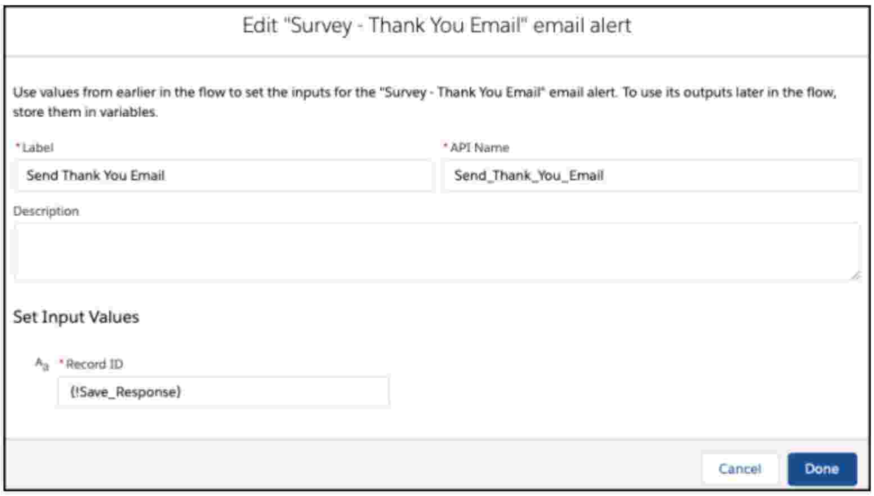


Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

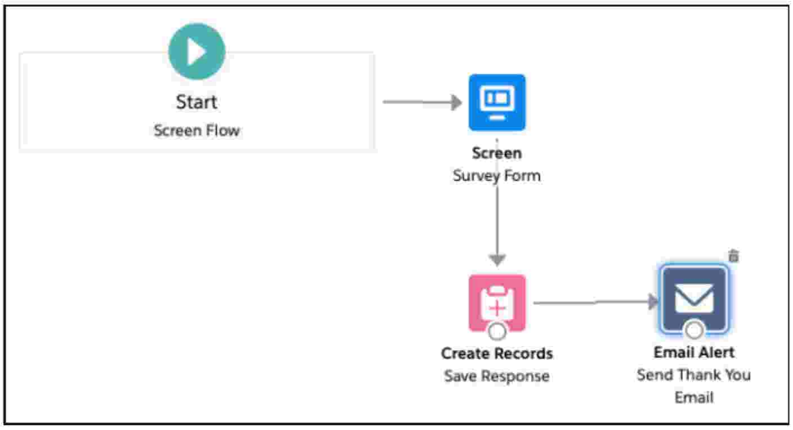
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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**.

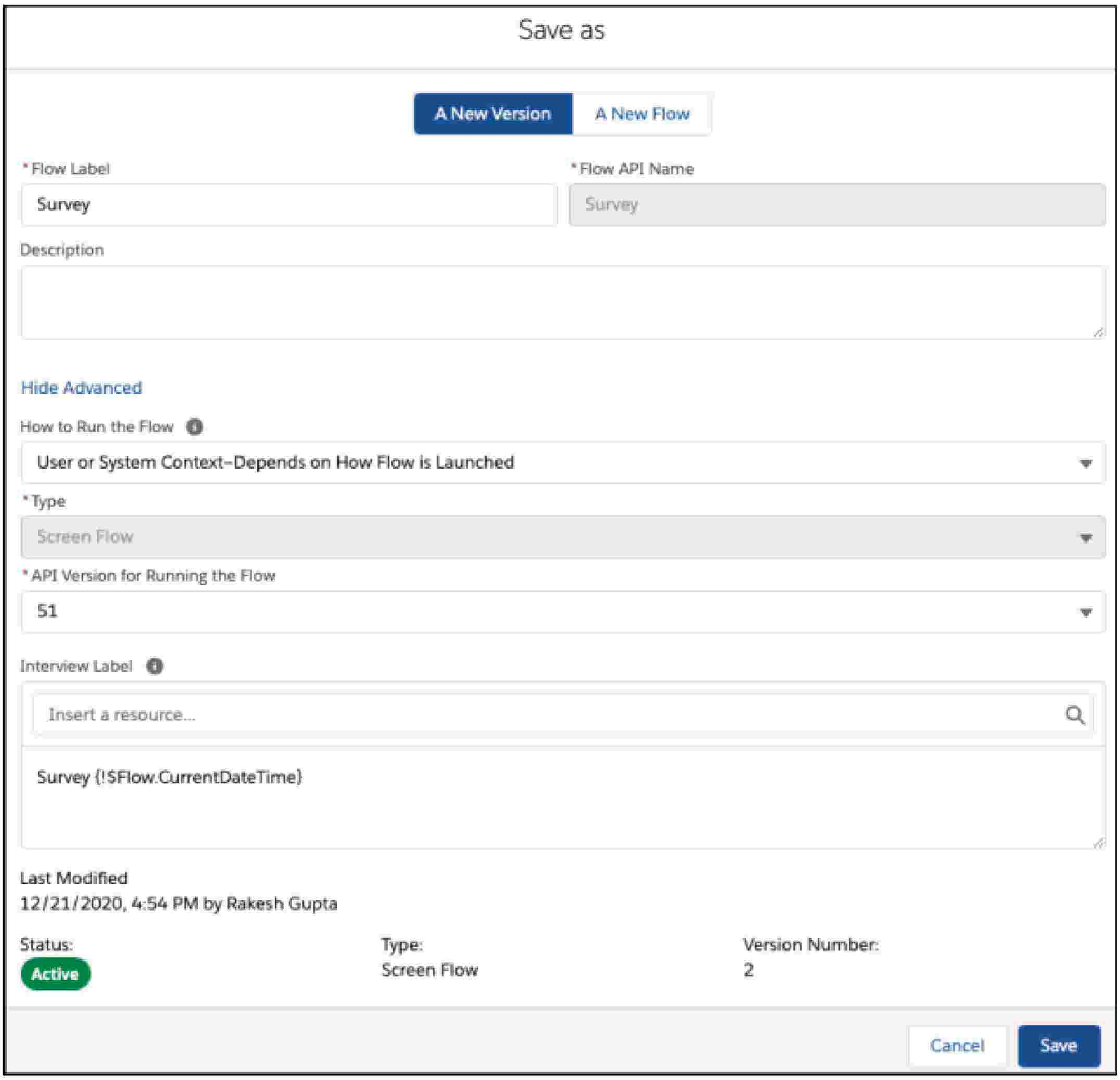


In the end, Sergio's **Flow** will look like the following screenshot:



1. Click **Save**.
2. Enter **Flow Label** the **API Name** will auto-populate.
3. Click **Show Advanced**.

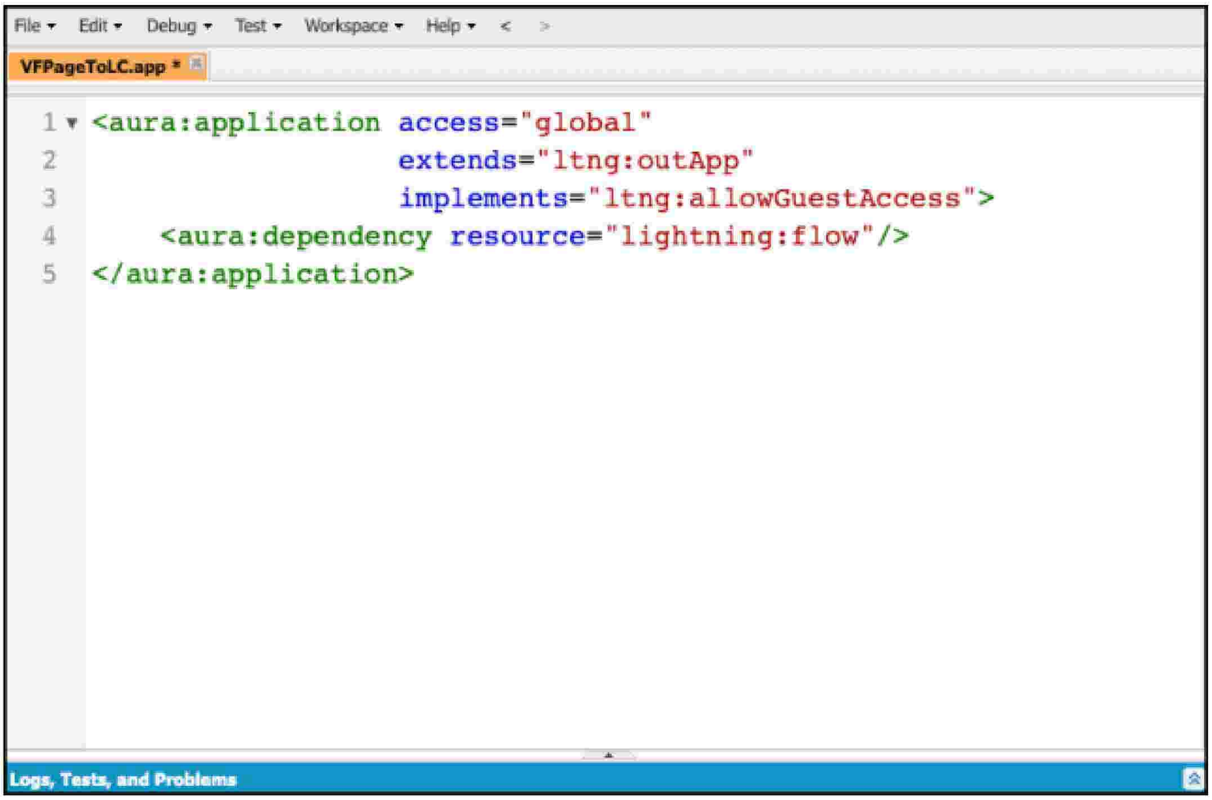
4. **How to Run the Flow: User or System Context—Depends on How Flow is Launched**
5. **Type**: **Screen Flow**
6. **API Version for Running the Flow**: **51**
7. **Interview Label**: **Survey {!$Flow.CurrentDateTime}**
8. Click **Save**.



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

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

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

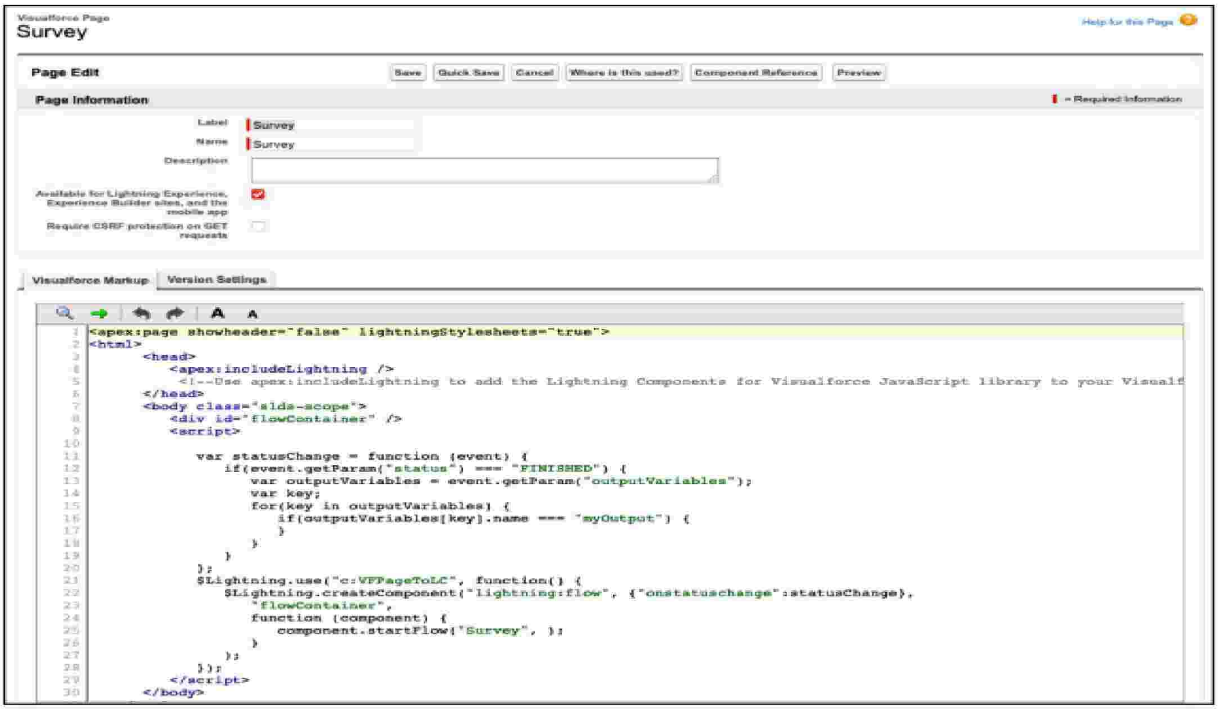


Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

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

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

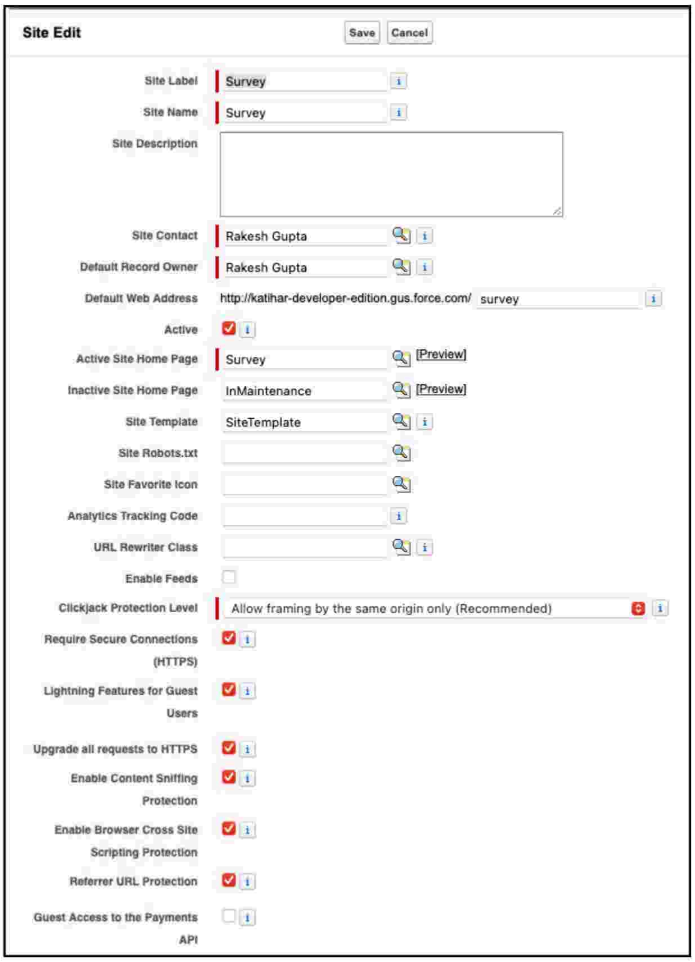


Step 7: Create a Force.com Site to Open Your Flow for Unauthenticated Access

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

1. Click **Setup**.

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



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:

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