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**Assignment no 1**

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

Solution:

### Step 1: Create Custom Objects

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

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** Shows "Setup" > "Object Manager" > "New Custom Object".
- Title Bar:** "SETUP" and "New Custom Object".
- Page Content:**
  - New Custom Object**
  - A message bar at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)".
  - Custom Object Definition Edit** section with buttons: "Save", "Save & New", "Cancel". A note says "I = Required Information".
  - Custom Object Information** section:
    - The singular and plural labels are used in tabs, page layouts, and reports.
    - Label:** college (Example: Account)
    - Plural Label:** colleges (Example: Accounts)
    - Starts with vowel sound:**
  - The Object Name is used when referencing the object via the API.
  - Object Name:** college (Example: Account)
  - Description:** (Large text area)
  - Context-Sensitive Help Setting:**
    - Open the standard Salesforce.com Help & Training window
    - Open a window using a Visualforce page
  - Content Name:** (dropdown menu) -None-
  - Enter Record Name Label and Format** section:
    - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
    - Record Name:** college Name (Example: Account Name)
    - Data Type:** Text (dropdown menu)
  - Optional Features** section (checkboxes):
    - Allow Reports
    - Allow Activities
    - Track Field History
    - Allow in Chatter Groups
    - Enable Licensing
  - Object Classification** section (checkboxes):
    - Allow Sharing
    - Allow Bulk API Access
    - Allow Streaming API Access
  - Deployment Status** section (radio buttons):
    - In Development
    - Deployed
  - Search Status** section (checkbox):
    - Allow Search
  - Object Creation Options (Available only when custom object is first created)** section (checkboxes):
    - 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"

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A message at the top indicates that permissions for the object are disabled for all profiles by default. The main form is titled 'Custom Object Definition Edit' and contains sections for 'Custom Object Information', 'Enter Record Name Label and Format', 'Optional Features', 'Object Classification', 'Deployment Status', and 'Search Status'. The 'Custom Object Information' section includes fields for 'Label' (set to 'department'), 'Plural Label' (set to 'departments'), and 'Object Name' (set to 'department'). The 'Enter Record Name Label and Format' section includes a 'Record Name' field (set to 'Department Name') and a 'Data Type' dropdown (set to 'Text'). The 'Optional Features' section has several checkboxes, most of which are checked. The 'Object Classification' section has three checked checkboxes. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has an unchecked checkbox for 'Allow Search'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

## 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.

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

**Details**

Fields & Relationships	Description
Page Layouts	API Name
Lightning Record Pages	CDepartment__c
Buttons, Links, and Actions	Custom
Compact Layouts	✓
Field Sets	Singular Label
Object Limits	CDepartment
Record Types	Plural Label
Related Lookup Filters	CDepartments
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	

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

Edit Delete

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

**Details**

**Fields & Relationships**

New Relationship

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

The top screenshot shows the 'New Relationship' wizard, Step 2 of 6. It asks to select a related object, with 'college' typed into the search bar. The bottom screenshot shows the 'New Custom Field' wizard, Step 1 of 6. It asks to choose a field type, with 'Roll Up Summary' selected. A detailed description of the 'Roll Up Summary' type is visible.

## 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.**

Fields & Relationships						
		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
		college	college__c	Master-Detail(college)	college	<input checked="" type="checkbox"/>
		Created By	CreatedBy	Lookup(User)		
		Department Name	Name	Text(80)		<input checked="" type="checkbox"/>
		Last Modified By	LastModifiedBy	Lookup(User)		

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. Below the navigation, a sidebar on the left lists 'User Interface' options: 'Rename Tabs and Labels' and 'Tabs'. A message at the top says, 'Didnt find what you're looking for? Try using Global Search.' 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:

Action	Label	Tab Style	Description
Edit   Del	Book1	Box	
Edit   Del	Research Proposal	Square	
Edit   Del	student	Box	

Below the table, it says 'No Web Tabs have been defined', 'No Visualforce Tabs have been defined', 'No Lightning component tabs have been defined', and 'No Lightning Page Tabs have been defined'.

The screenshot shows the Salesforce Setup interface under the 'Object Manager' section for the 'college' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'college'. The main content area is titled 'New Custom Field' and shows 'Step 5. Add to page layouts'. On the left, a sidebar lists various customization options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main form displays field details: Field Label 'Total count', Data Type 'Roll-Up Summary', Field Name 'Total\_count', and a Description field. It also includes a note about selecting page layouts and checkboxes for 'Add Field' and 'Page Layout Name'. At the bottom, buttons for 'Previous', 'Save & New', 'Save', and 'Cancel' are visible.

Salesforce Setup - Object Manager

college

New Custom Field

Step 4. Establish field-level security

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

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

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

Help for this Page

Salesforce Setup - Object Manager

college

New Custom Field

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: college  
Summarized Object: CDepartments

Select Roll-Up Type

COUNT  
 SUM  
 MIN  
 MAX

Field to Aggregate: None

Filter Criteria

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

Help for this Page

**college**

### New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label: Total count

Field Name: Total\_count

Description:

Help Text:

Auto add to custom report type  Add this field to existing custom report types that contain this entity

Previous Next Cancel

**college**

### New Custom Field

Step 1 Step 1

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

**Data Type**

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- ... Allows users to select a True (checked) or False (unchecked) value.

Next Cancel

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar with the query 'college'. Below the navigation is a breadcrumb trail 'SETUP > OBJECT MANAGER college'. The main content area is titled 'Fields & Relationships' with a sub-section '4 Items, Sorted by Field Label'. A table lists four fields: 'college Name' (Name, Text(80)), 'Created By' (CreatedBy, Lookup(User)), 'Last Modified By' (LastModifiedBy, Lookup(User)), and 'Owner' (OwnerId, Lookup(User,Group)). The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. On the left sidebar, under 'Fields & Relationships', there are links to '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'.

## 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, the sub-section title is 'Step 2. Add to Profiles'. A note says: 'Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.' There are two radio buttons: one selected for 'Apply one tab visibility to all profiles [Default On]' and another for 'Apply a different tab visibility for each profile'. To the right, there's a 'Tab Visibility' column with dropdown menus for each profile listed. At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main content area is titled 'New Custom Object Tab' and is divided into three steps. Step 1, 'Enter the Details', is currently active. It allows users to choose a custom object ('Object' dropdown set to 'college') and a tab style ('Tab Style' dropdown set to 'Jewel'). A note indicates that users can choose a 'Splash Page Custom Link' to show as a splash page when users click on the tab. Step 2, 'Customize the Tab', is visible below. Step 3, 'Add to Custom Apps', is also visible. The top navigation bar includes links for Home, Object Manager, and various system icons.

The screenshot shows the 'Step 3: Add to Custom Apps' page. It lists various standard and custom apps available for adding to the new custom tab. Each app has a checkbox labeled 'Include Tab'. Most checkboxes are checked. A note at the bottom states: 'Append tab to users' existing personal customizations'. The top navigation bar includes links for Home, Object Manager, and various system icons.

Custom App	Include Tab
Platform (standard_Platform)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_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_DataManager)	<input checked="" type="checkbox"/>
Bolt Solutions (standard_LightningBolt)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

**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 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	✓

Salesforce Setup interface showing the 'Tabs' section.

**Custom Tabs**

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

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

**Custom Object Tabs**

Action	Label	Tab Style	Description
Edit   Del	Book1	Box	
Edit   Del	Departments	Lightning	
Edit   Del	colleges	Jewel	
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**

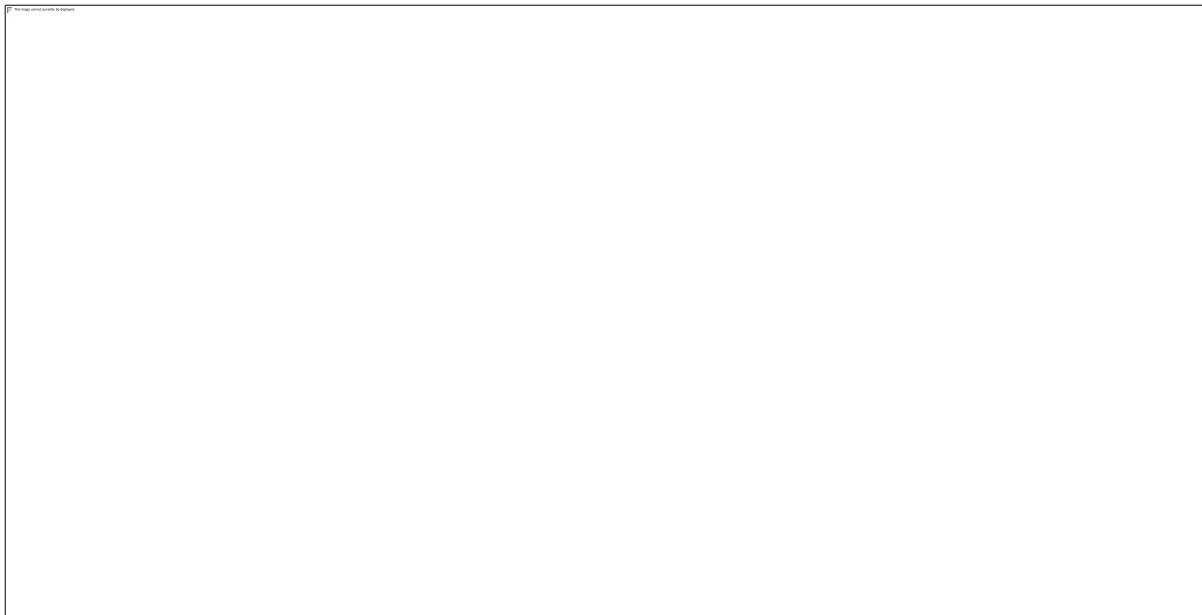
No Lightning Page Tabs have been defined.

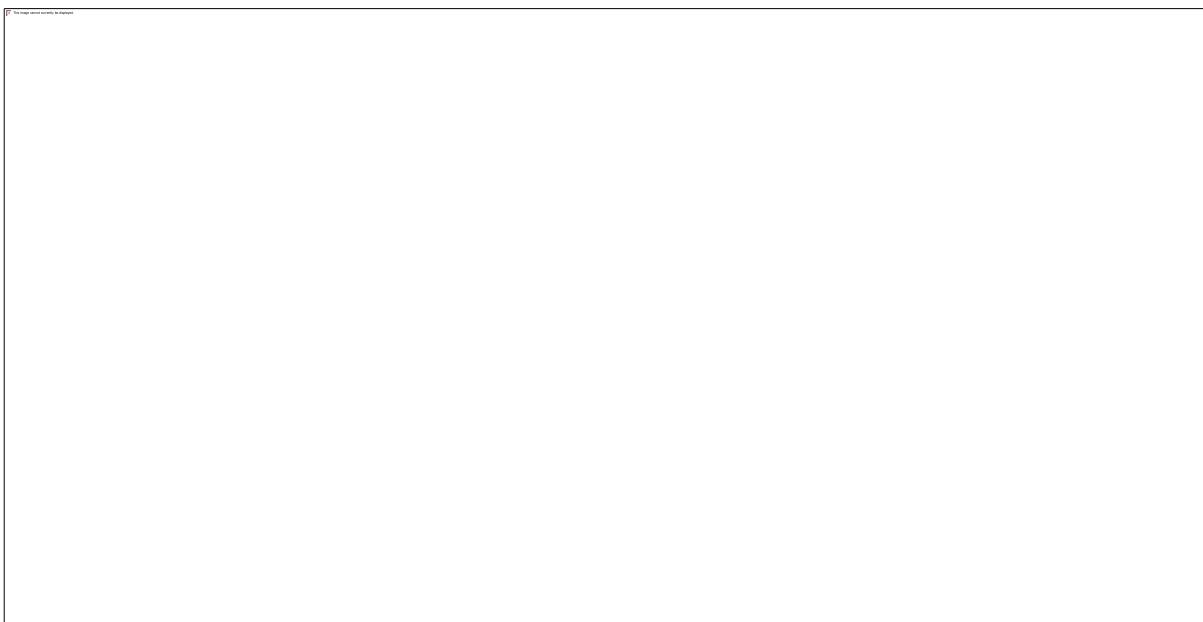
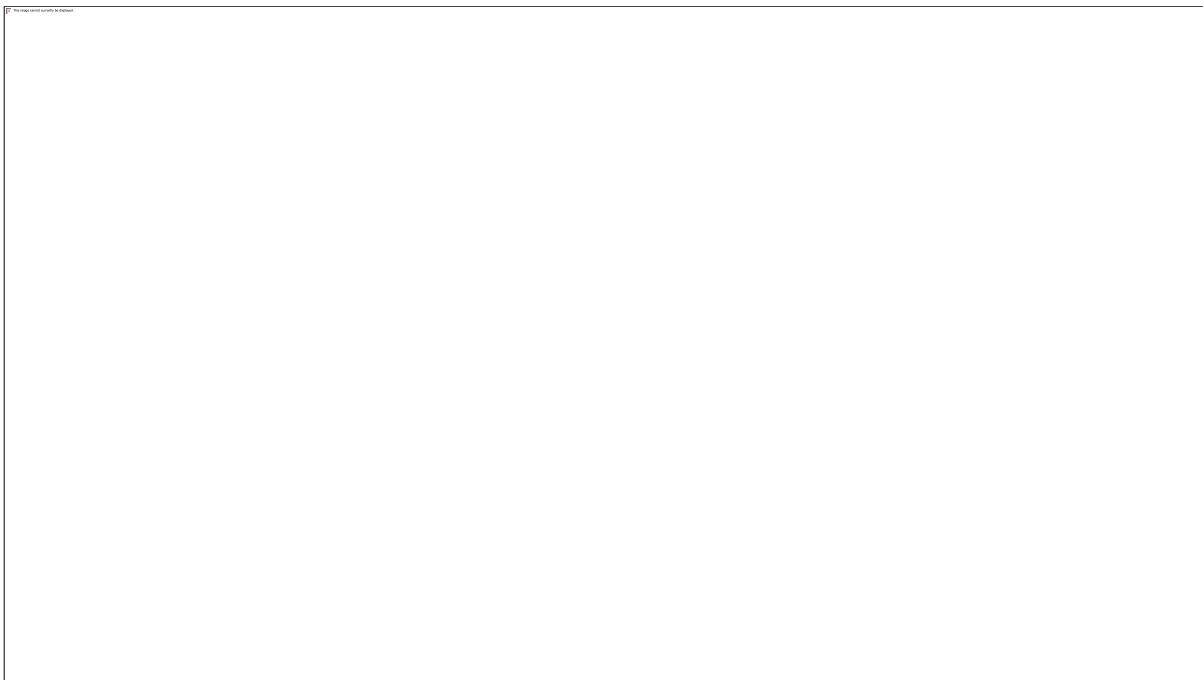
The main content area below the tabs section is currently empty.

## **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.**









The input cannot currently be displayed.

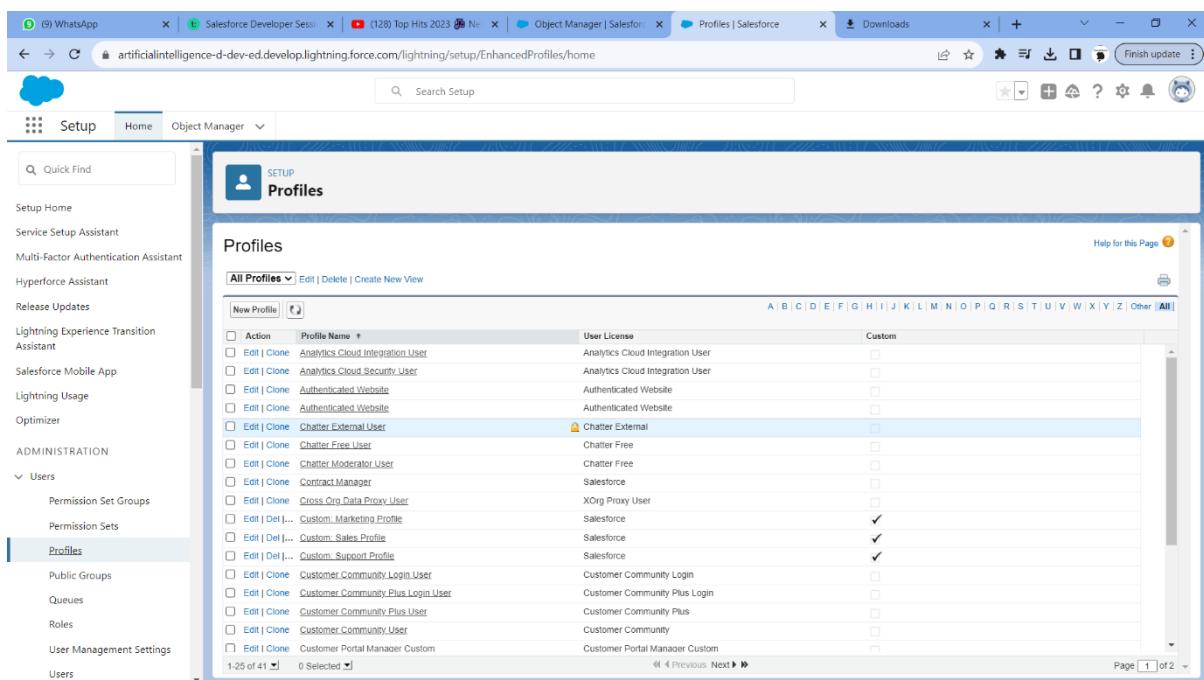
This screenshot shows a CRM application interface for managing educational institutions. At the top, there is a navigation bar with links for 'My college', 'colleges', 'CDepartments', 'student', and 'Content'. A search bar is located at the top right. Below the navigation, the main content area displays a college record for 'mecw'. The record includes fields for 'college Name' (mecw), 'Total count' (2), 'phone' (9087116402), 'Email' (kiot@gmail.com), and 'Location' (90, 80). On the right side of the record, it shows the 'Owner' as 'krishna s' and the 'Last Modified By' as 'krishna s' on 01/10/2023, 11:19 am'. There are also buttons for 'New Contact', 'Edit', and '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. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lighting Usage, Optimizer, Administration, Users, and various Profile-related sections like Public Groups, Queues, Roles, and User Management Settings. The main content area displays a table of profiles. One profile, 'Chatter External', is highlighted with a blue selection bar. The table columns include Action, Profile Name, User License, and Status (Custom). Other profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter Free User, Chatter Moderator User, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, Custom Sales Profile, Custom Support Profile, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, and Customer Portal Manager Custom. The status column for most profiles shows 'Custom', while 'Salesforce' is checked for several profiles like Chatter External, Chatter Free, and Customer Community.

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

Screenshot of the Salesforce Setup interface showing the Profiles page.

The left sidebar shows the following navigation:

- 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

The main content area displays the "Profiles" list:

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

Help for this Page 

1 of 7 0 Selected Previous Next Page 1 of 1

Screenshot of the Salesforce Setup interface showing the "Clone Profile" dialog.

The left sidebar shows the same navigation as the previous screenshot.

The main content area displays the "Clone Profile" dialog:

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page 

javascipt:srcUp(%27%2F\_u%2Fperms%2Fu%2Fprofile%2Fe%3Fid%3D00e5j000003uvKu%26setupid%3DEnhancedProfiles%26retURL%3D%252F00e%253Fc%253D00B9j00000C7U%2526rolodexIndex%253D18%2526page%253D1%2526sdtp%253Dp1%26sdtp%...

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## Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page

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

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## 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.

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

Help for this Page

Profile Manager

Profile Detail

Standard Object Layouts

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

Page Layouts

Standard Object Layouts

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

Help for this Page

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

Screenshot of the Salesforce Setup interface showing the Profiles Manager screen.

**Profile Edit**

Name	Manager	User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>												
Custom App Settings																	
Analytics Studio (standard__Insights)	<input type="radio"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input type="radio"/>	<input checked="" type="radio"/>												
App Launcher (standard__AppLauncher)	<input type="radio"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="radio"/>	<input checked="" type="radio"/>												
slot (slot)	<input checked="" type="radio"/>	<input type="radio"/>															
Service Provider Access																	
Tab Settings																	
<input type="checkbox"/> Overwrite users' personal tab customizations Standard Tab Settings <table border="1"> <tr> <td>Home</td> <td>Default On</td> <td>Learning</td> <td>Default On</td> </tr> <tr> <td>Accounts</td> <td>Default On</td> <td>Libraries</td> <td>Tab Hidden</td> </tr> <tr> <td>Alert Settings</td> <td>Default Off</td> <td colspan="2">Lightning Bolt Solutions</td> </tr> </table>						Home	Default On	Learning	Default On	Accounts	Default On	Libraries	Tab Hidden	Alert Settings	Default Off	Lightning Bolt Solutions	
Home	Default On	Learning	Default On														
Accounts	Default On	Libraries	Tab Hidden														
Alert Settings	Default Off	Lightning Bolt Solutions															

**Communication Subscription Channel Types**

Individuals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Custom Object Permissions**

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

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

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	Create	Edit	Delete	Data Administration
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
customers	<input checked="" type="checkbox"/>				

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days	Enforce password history: 3 passwords remembered	Minimum password length: 8	Password complexity requirement: Must include alpha and numeric characters
Password question requirement: Cannot contain password	Maximum invalid login attempts: 10	Lockout effective period: 15 minutes	

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration
Bank	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
customers	<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 | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

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	Create	Edit	Delete	Data Administration
Bank	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
customers	<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	

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration
Bank	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
customers	<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 | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

## Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

## 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 | Edit | Create | New | View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit   Login	Adriana_Diva	dadan	test_diva_nas_4e0b0f0wtk_ts2grgkpxp_3nj0f0fyzewns_h43tkzw6meia@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMS User
<input type="checkbox"/>   Edit	Chatter Export	Chatter	chatty_000d5000000cxskeap_lc0bhymn0is@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit   Login	Ellington_Amelia	aelli	amelia.ellington.1.46kxcc0poohh_6cyedcuodwh_hnbdlwmvvhho_wguctor1dalv@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	S_GOPAN	GS	kct520@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	User_Integration	integ	integration@000d500000bcxskeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@000d500000bcxskeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Developer Session | Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: [ ] Role: <None Specified>

Last Name: [ ] User License: Salesforce Integration

Aliases: [ ] Profile: Salesforce API Only System Integrations

Email: [ ] Active:

Username: [ ] Marketing User:

Nickname: [ ] Offline User:

Title: [ ] Knowledge User:

Company: [ ] Flow User:

Department: [ ] Service Cloud User:

Division: [ ] Site.com Contributor User:

Data.com User Type: [ ] Site.com Publisher User:

Data.com Monthly Addition Limit: Default Limit (300) WDC User:

Accessibility Mode (Classic Only):  High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:  Debug Mode:

Help for this Page

Salesforce Developer Session | Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmya Role: <None Specified>

Last Name: bala User License: Salesforce Platform

Aliases: sba@ka Profile: Manager

Email: 2k20cse179@kiot.ac.in Active:

Username: 2k21t@kiot.ac.in Marketing User:

Nickname: User169616771282564526 Offline User:

Title: worker Knowledge User:

Company: kiot bank Flow User:

Department:

Division:

Data.com User Type: [ ] Service Cloud User:

Data.com Monthly Addition Limit: Default Limit (300) Site.com Contributor User:

Accessibility Mode (Classic Only):  Site.com Publisher User:

High-Contrast Palette on Charts:  WDC User:

Load Lightning Pages While Scrolling:  Debug Mode:

Help for this Page

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The user profile for 'SOWMYA bala' is displayed, showing details like Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password Authenticator, and App Registration: Salesforce Authenticator. The user is assigned to the 'Manager' profile and has the 'Active' status checked.

**User Detail**

Name	sowmya bala	Role	Salesforce Platform
Alias	stala	User License	Manager
Email	2k20case179@kiot.ac.in [Verify]	Marketing User	<input checked="" type="checkbox"/>
Username	2k21it@kiot.ac.in	Offline User	<input type="checkbox"/>
Nickname	User16961677128256452616	Knowledge User	<input type="checkbox"/>
Title	worker	Flow User	<input type="checkbox"/>
Company	kiot bank	Service Cloud User	<input type="checkbox"/>
Department		Sites.com Contributor User	<input type="checkbox"/>
Division		Sites.com Publisher User	<input type="checkbox"/>
Address		WDC User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Mobile Push Registrations	<input checked="" type="checkbox"/>
Locale	English (India)	Data.com User Type	<input type="checkbox"/>
Language	English	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Delegated Approver		Debug Mode	<input type="checkbox"/>
Manager	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/>
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator			

**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!

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(9) WhatsApp x | (1) Salesforce Dev x | (128) Top Hit x | Object Manager x | Users | Sales x | Downloads x | Welcome to x | Recently Viewed x | Change Your x + - \_ Finish update

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 x +

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**

AI Day

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Recently Viewed | Bank | Salesfo... +

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

MECW

mecw Bank customers Home

Bank Recently Viewed

0 items • Sorted by Bank Name • Updated a few seconds ago

Bank Name ↓

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

DISPLAY DENSITY

Comfy (selected)

Compact

OPTIONS

Switch to Salesforce Classic

Add Username

New Bank | Salesforce +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank\_\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=16...

Incognito Finish update

mecw Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

\* = Required Information

Information
<p>Bank Name: boi</p> <p>Owner: sowmiya bala</p> <p>phoneno: 0897754534</p>

Cancel Save & New Save

**New customer | Salesforce**

[https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer\\_\\_c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\\_VIEW&ui...](https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer__c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&ui...) Incognito Finish update

meCW Bank customers Home

Recently Viewed ▾

0 items • Sorted by customer Name • Updated a few seconds ago

customer Name ↓

New customer

\* = Required Information

Information

\* customer Name: madhu

\* Bank: boi

Cancel Save & New Save

**meCW**

meCW customer madhu

customer madhu was created.

New Contact Edit Delete

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

List View

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Profiles | Salesforce | Welcome to Salesforce: Verify... | + | Finish update

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

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Profiles | Salesforce | Welcome to Salesforce: Verify... | + | Finish update

You must select an existing profile to clone from.

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

Save Cancel

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify...

**Setup** Home Object Manager

**Profiles**

**Profile**  
**salesmanage**

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

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

**Profile Detail**

Name	salesmanage	User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description		Created By	GOPALS_01/10/2023, 7:19 pm	Modified By	GOPALS_01/10/2023, 7:19 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 Adjustment Layout [View Assignment]
Asset	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
	Asset Layout [View Assignment]	Payment Gateway Layout [View Assignment]

**Profile Edit**  
**salesmanage**

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	salesmanage	User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description					

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

**Standard Tab Settings**

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

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

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 Profiles Public Groups Queues Roles User Management Settings Users

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	Basic Access	Create	Edit	Data Administration
	Read	View All	Modify All			Read	View All	Modify All	
Contact Point Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Save Save & New Cancel

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

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 Profiles Public Groups Queues Roles User Management Settings Users

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	Basic Access	Create	Edit	Data Administration
	Read	View All	Modify All			Read	View All	Modify All	
Contact Point Emails	<input checked="" type="checkbox"/>								
User External Credentials	<input type="checkbox"/>								
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enhancement Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

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Session Security Level Required at Login: None

Password Policies

User passwords expire in:	90 days
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Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
Obfuscate secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

Save Save & New Cancel

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Page | Users | Salesforce | Welcome to Salesforce: Verify your...

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit Save Save & New Cancel

General Information

First Name:  Last Name:  Role: <None Specified>

Alias:  User License: Salesforce Integration

Email:  Profile: Salesforce API Only System Integrations

Username:  Active:

Nickname:  Marketing User:

Title:  Offline User:

Company:  Knowledge User:

Department:  Flow User:

Division:  Service Cloud User:

Data.com User Type:  Site.com Contributor User:

Data.com Monthly Addition Limit: Default Limit (300)

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Page | Users | Salesforce | Welcome to Salesforce: Verify your...

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit Save Save & New Cancel

General Information

First Name: madhu Last Name:  Role: <None Specified>

Alias: mb User License: Salesforce Platform

Email: 2k20cse179@kiot.ac.in Profile: salesmanage

Username: 2k20cse179@kiot.ac.in Active:

Nickname: User169616842428854192 Marketing User:

Title: worker Offline User:

Company: kiot bank Knowledge User:

Department: Sales Flow User:

Division: Service Cloud User:

Data.com User Type:  Site.com Contributor User:

Data.com Monthly Addition Limit: Default Limit (300)

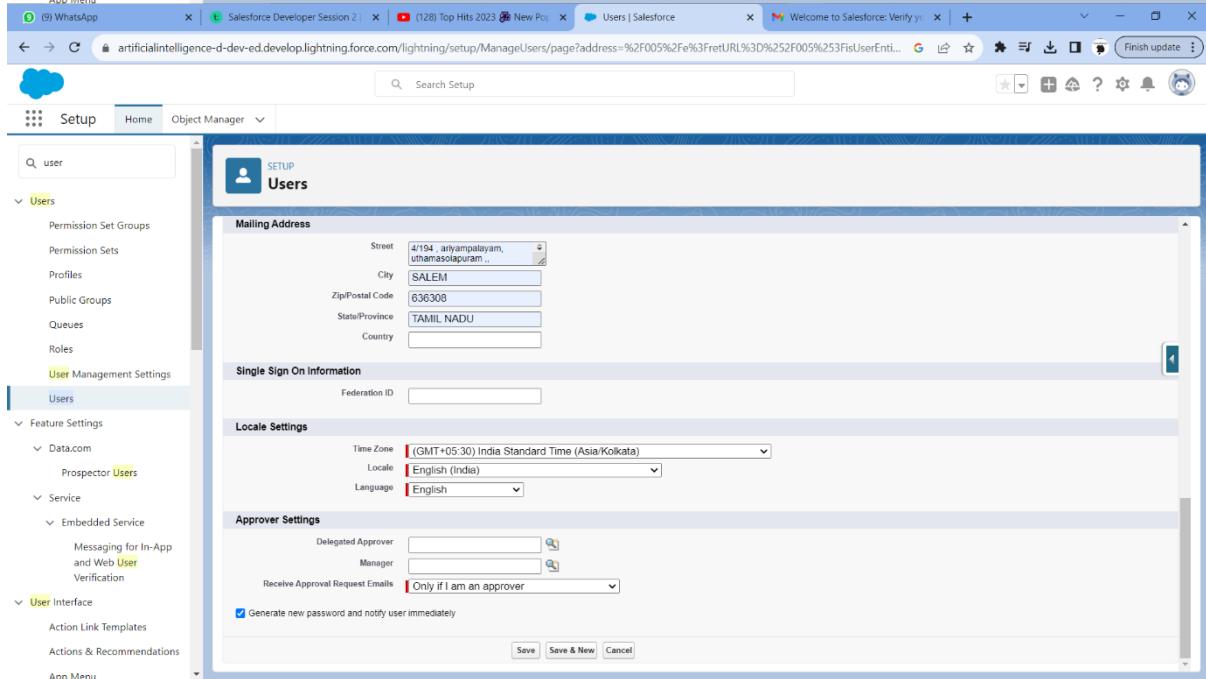
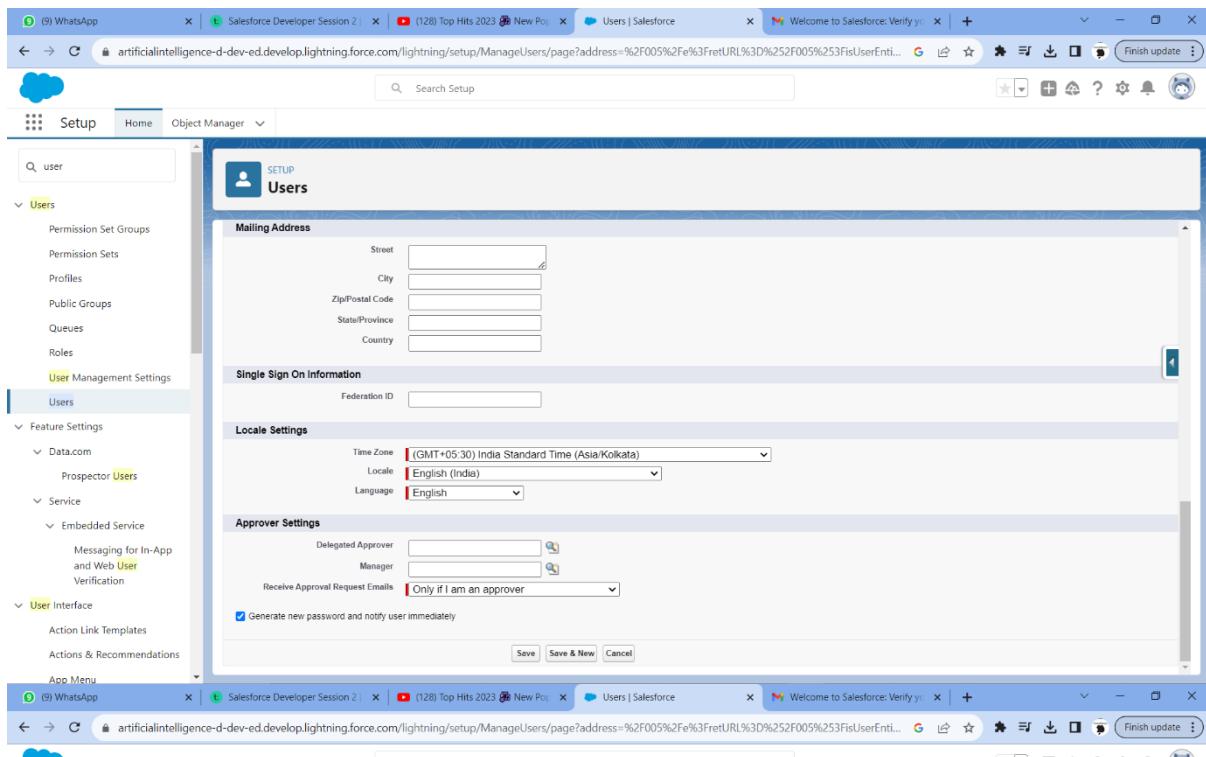
Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page



Screenshot showing the Salesforce Developer Session 2 interface and a Gmail inbox.

**Salesforce Developer Session 2:**

- Tab: Users | Salesforce
- URL: <https://artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000A4UxV%3Fnoredirect%3D1%26isUserEn...>
- Content: User Detail for "madhu b".

Name	madhu b	Role	Salesforce Platform
Alias	mb	User License	Active
Email	2k20csit79@kiot.ac.in [Verify]	Profile	salesmanager
Username	2k20csit@kiot.ac.in	Marketing User	<input checked="" type="checkbox"/>
Nickname	User16961684242855419206	Offline 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		Sites.com Contributor User	<input type="checkbox"/>
Address	41/94, ammalpalayam, uhamasolapuram .., Paraikkadu , salem- 636308	Sites.com 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	<a href="#">View</a>
Language	English	Data.com User Type	<a href="#">Edit</a>
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"/>
Action Link Templates	Federation ID	High-Contrast Palette on Charts	<input type="checkbox"/>
Actions & Recommendations	App Registration: One-Time Password Authenticator	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

**Gmail:**

- Tab: Welcome to Salesforce!
- URL: <https://artificialintelligence-d-dev-ed-develop.my.salesforce.com>
- Content: Welcome to Salesforce! Click below to verify your account. Verify Account button.

Change Your Password | Salesforce

artificialintelligence-d-dev-ed.develop.my.salesforce.com/\_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupId=ChangePa... Incognito (3) Finish 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 (3) Finish update

MECW

mecw Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

New

Bank Name

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

List View

Recently Viewed | customers | S | +

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

Incognito (3) Finish update

## MECW

meow Bank customers Home

Search...

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

WhatsApp Salesforce Developer Session Top Hits 2023 Permission Sets | Salesforce Welcome to Salesforce! Reset Password | Salesforce

Finish update

Setup Home Object Manager

Search Setup

## Permission Sets

Help for this Page

Permission Sets

On this page you can 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: [iOS](#) | [Android](#)

All Permission Sets | Edit | Delete | Create New View

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

1-25 of 29 | 0 Selected | Page 1 of 2

<https://artificialintelligence-d-dev-ed.develop.lightning.force.com/one/app#/setup/PermSets/home>

## 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:

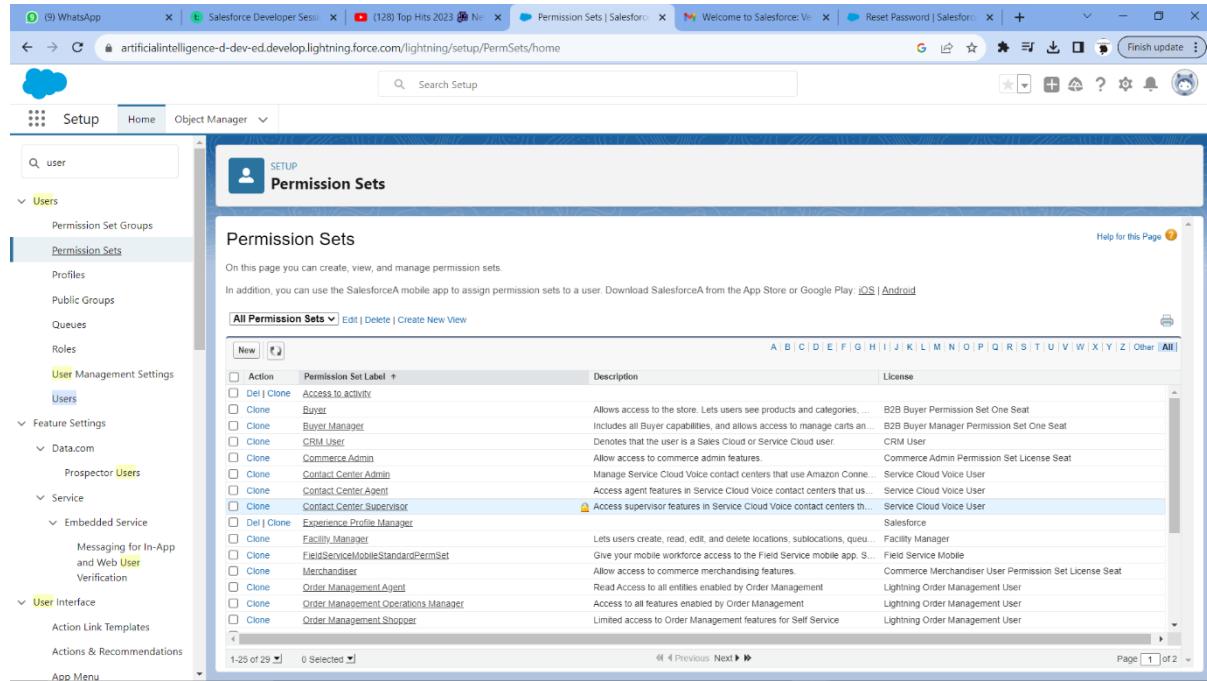
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## 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 is collapsed, and the main content area displays a table of permission sets. The table columns are '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, FieldServiceMobileStandardPermSet, Merchandiser, Order\_Management\_Agent, Order\_Management\_Operations\_Manager, and Order\_Management\_Shopper. Each row includes a checkbox for 'Action' and a 'Clone' button. The 'Description' column provides a brief overview of the permissions granted, and the 'License' column indicates the specific license required for each set. The bottom of the page shows pagination controls and a note about mobile app access.

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"/>	Clone	Buyer	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer_Manager	CRM User
<input type="checkbox"/>	Clone	CRM_User	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Commerce_Admin	Commerce Admin
<input type="checkbox"/>	Clone	Contact_Center_Admin	Commerce Cloud Voice contact centers that use Amazon Conn...
<input type="checkbox"/>	Clone	Contact_Center_Agent	Manage Service Cloud Voice contact centers that us...
<input type="checkbox"/>	Clone	Contact_Center_Supervisor	Access agent features in Service Cloud Voice contact centers th...
<input type="checkbox"/>	Clone	Experience_Profile_Manager	Salesforce
<input type="checkbox"/>	Clone	Facility_Manager	Facility Manager
<input type="checkbox"/>	Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. S...
<input type="checkbox"/>	Clone	Merchandiser	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Clone	Order_Management_Agent	Allow access to commerce merchandising features.
<input type="checkbox"/>	Clone	Order_Management_Operations_Manager	Read Access to all entities enabled by Order Management
<input type="checkbox"/>	Clone	Order_Management_Shopper	Access to all features enabled by Order Management
		Limited access to Order Management features for Self Service	Lightning Order Management User

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

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

Permission Sets

Create

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

Not sure what a permission set license is? [Learn more here.](#)

License:  --None--

Save Cancel

Help for this Page

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Search Setup

User

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Action Link Templates

Actions & Recommendations

App Menu

Permission Sets

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?

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

Not sure what a permission set license is? [Learn more here.](#)

License:  --None--

Save Cancel

Help for this Page

Screenshot of the Salesforce Setup interface showing the Permission Sets page.

**Permission Set Overview:**

Setting	Description	Value
Description	API Name	salesmanager
License	Namespace Prefix	GOPALS_
Session Activation Required	Created By	GOPAL S. 01/10/2023, 7:29 pm
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:** Permissions to authenticate against external data sources.
- Flow Access:** Permissions to execute Flows.

**Object Settings:**

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invitees	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

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

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

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

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Bank' tab is selected.

**Tab Settings**

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

**Object Permissions**

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

**Field Permissions**

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

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

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

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

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Bank' tab is selected.

**Tab Settings**

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

**Object Permissions**

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

**Field Permissions**

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

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 42.0 | Reset Password | Salesforce

[Finish update](#)

Setup Home Object Manager

User Management Settings

Current Assignments

No assignments defined.

Select Users to Assign

Full Name	All...	Username	Role	Action	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9odih.d6cwpdcuo4wh.hnbdwmvwhhq.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Force.com - App Subscription User
Chatter Expert	Chatter	chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Diya Adanna	dadian	test_diya_pas.4w8bjybi9wik.tszrgsbbkpxp.3gi8ofovzwns.h43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UIMS User
GOPAL S	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Integration User	integ	integration@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	salesmanager
Security User	sec	insightssecurity@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
sowmiya bala	sbala	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager

Cancel Next

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date (selected)

Specify the expiration date: 1 Day, 1 Week, 30 Days, 60 Days, Custom 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 Back Assign

PERMISSION SET 'SALESMANA' 1 assignments were successful.

Assignment Summary:

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

Done

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

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App Menu

Recently Viewed | customers | [S](#) [+](#)

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

MECW

mebw Bank customers Home

Search...

**Recently Viewed**

0 items • Updated a few seconds ago

customer Name	
You haven't viewed any customers recently. Try switching list views.	

**LIST VIEW CONTROLS**

New

- Clone
- Rename
- Sharing Settings
- Show List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

`javascript:void(0)`

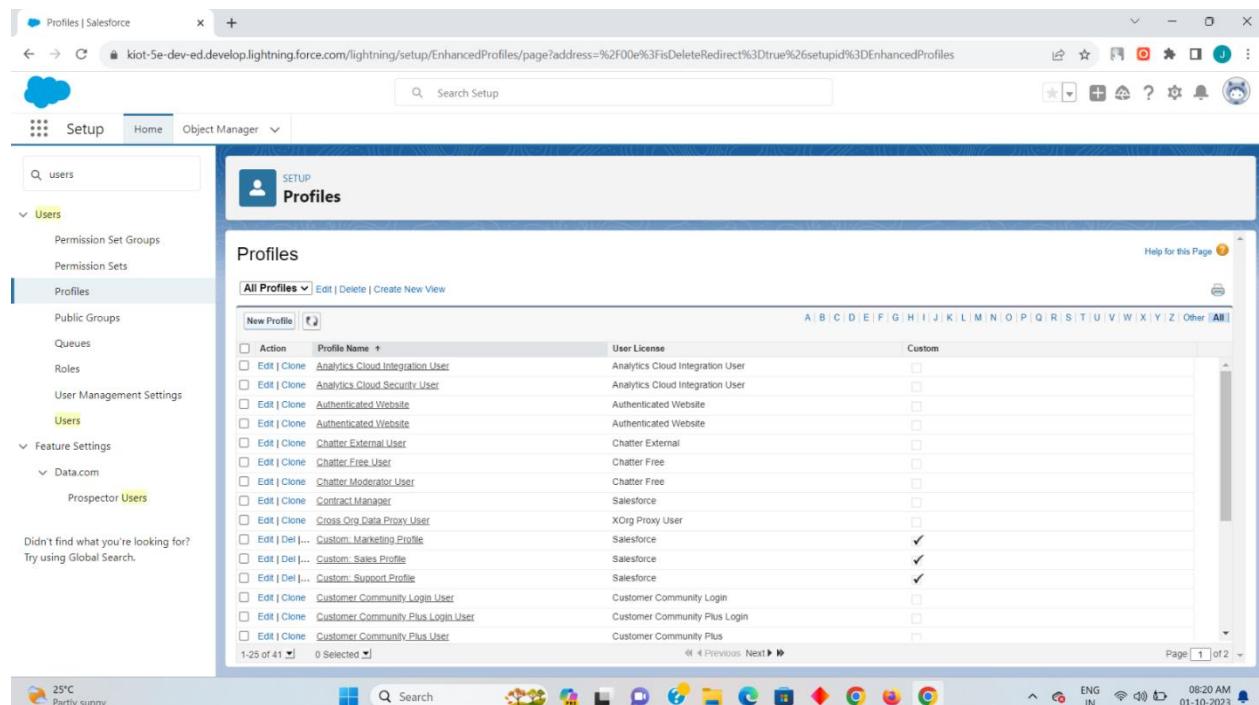
This screenshot shows a Salesforce Lightning interface for a 'customers' list view. The title bar includes 'Recently Viewed | customers' and a search bar. The main content area displays a table with a single row: 'You haven't viewed any customers recently. Try switching list views.' A context menu is open on the right side of the header, with 'New' highlighted. Other options in the menu include Clone, Rename, Sharing Settings, Show List Filters, Select Fields to Display, Delete, and Reset Column Widths.

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 with the following details:

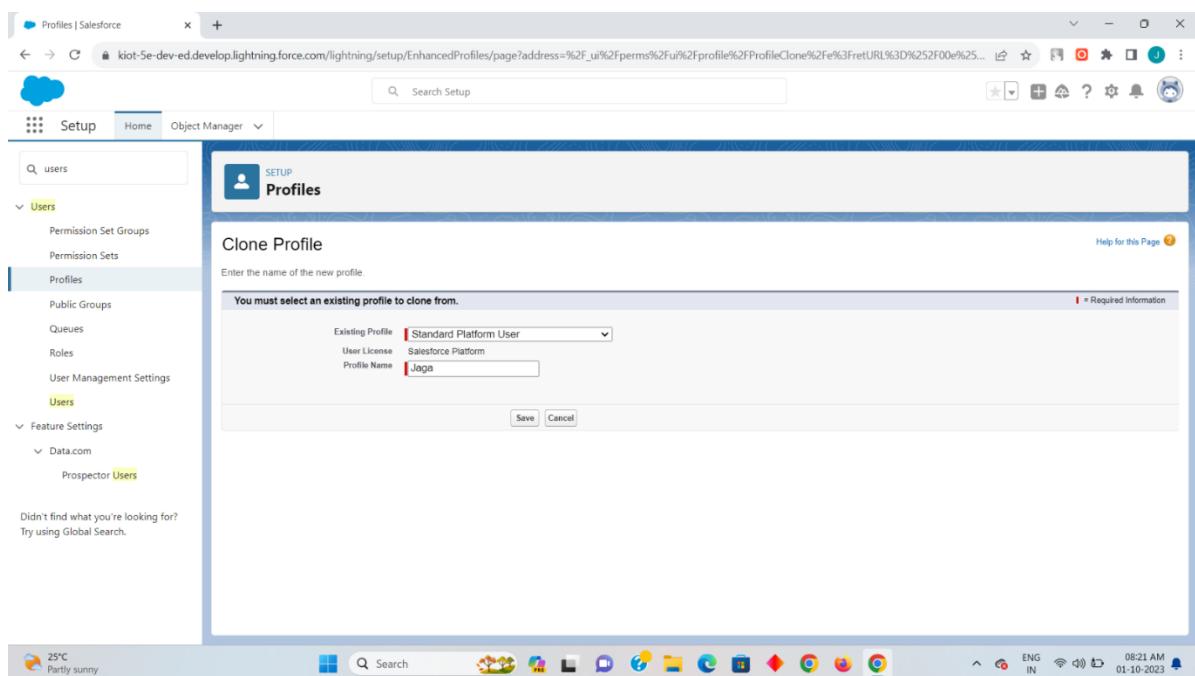
- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager. Under "Users", "Profiles" is selected.
- Section Header:** Profiles
- Sub-Header:** All Profiles
- Table:** A list of profiles with columns: Action, Profile Name, User License, and Custom. Some profiles have checkboxes next to them.

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

- Page Footer:** 25°C Partly sunny, Search bar, various icons, and system status (ENG IN, 08:20 AM, 01-10-2023).

## Step 2:

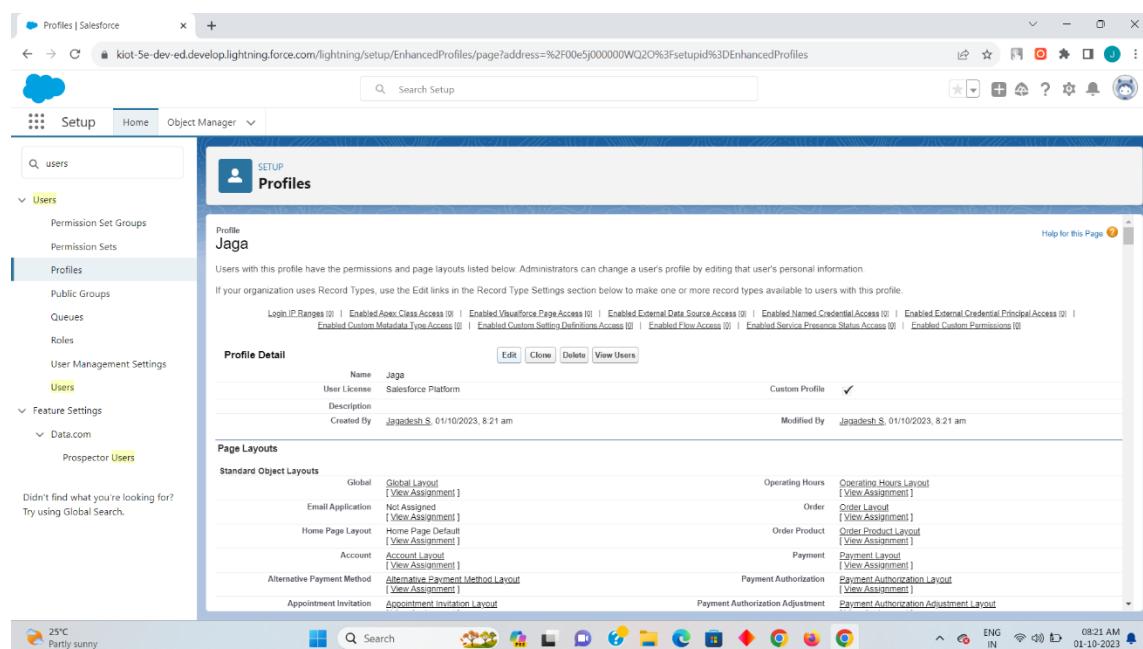
Click on the new to create a new profile along with the label and Api



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

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3FreURL%3D%252F00e5j00000WQ2O%253Fsetupid...

Setup Home Object Manager

Search Setup

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.

25°C Partly sunny

SETUP Profiles

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

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

Custom Object Permissions

	Basic Access	Read	Create	Edit	Delete	Data Administration	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 activation during Experience Cloud site login.

25°C Partly sunny

ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3FreURL%3D%252F00e5j00000WQ2O%253Fsetupid...

Setup Home Object Manager

Search Setup

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.

25°C Partly sunny

SETUP Profiles

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

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

Custom Object Permissions

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

Session Settings

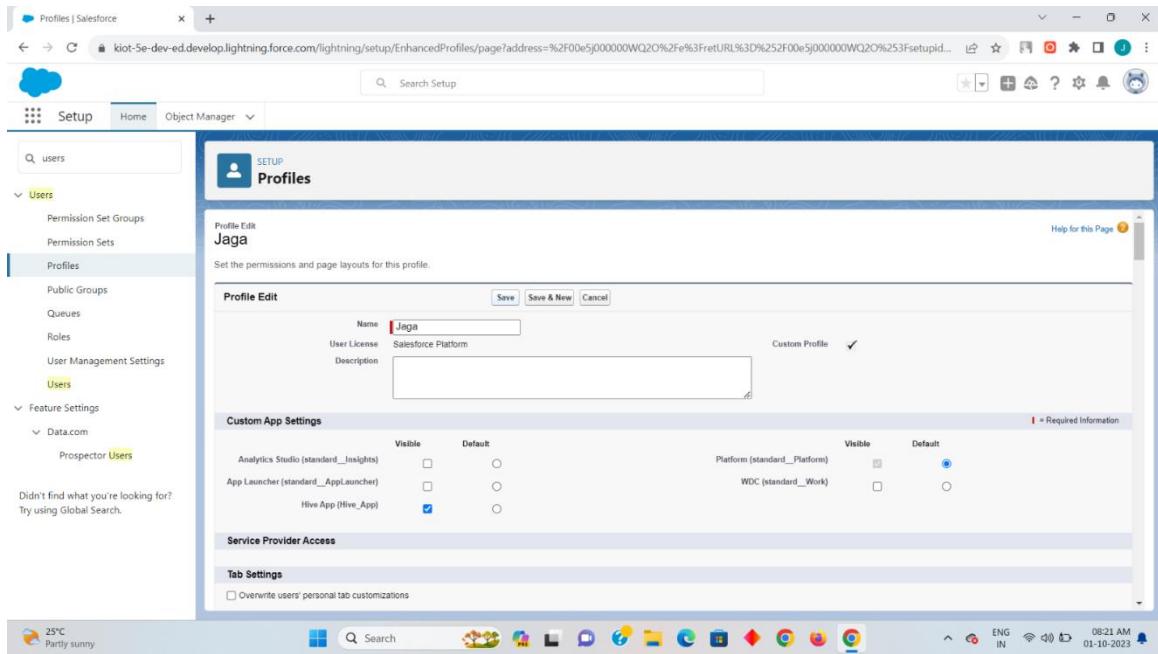
Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

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

25°C Partly sunny

ENG IN 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 Expert	Chatter	chatty@00d500000c8oseaf6z@bkrikid4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit Grey Jane	Jgrey	jane_gran_fygnimmoalm.c27d2kioqth@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	Edit S.Jaga	JS	jaga038@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit S.Jagadesh	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit S.Jagadesh	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit User_Integration	Integ	integration@00d500000c8oseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit User_Security	sec	insightssecurity@00d500000c8oseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Setup - Users

New User

User Edit

General Information

First Name	Jagadesh11
Last Name	S
Alias	J
Email	jwv123@gmail.com
Username	jwv123@gmail.com
Nickname	User169612875144962592
Title	
Company	
Department	
Division	

Role: Director, Channel Sales  
User License: Salesforce Platform  
Profile: Standard Platform User  
Active: Jaga  
Marketing User: Standard Platform User

Office User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type:   
Data.com Monthly Addition Limit: Default Limit (300)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

Help for this Page

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

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

25°C Partly sunny 08:23 AM 01-10-2023 ENG IN

Salesforce Setup - Users

New User

User Edit

General Information

First Name	Jagadesh22
Last Name	S
Alias	J
Email	jw1@gmail.com
Username	jw1@gmail.com
Nickname	User169612879983618745
Title	
Company	
Department	
Division	

Role: Marketing Team  
User License: Salesforce Platform  
Profile: Standard Platform User  
Active: Jaga  
Marketing User: Standard Platform User

Office User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type:   
Data.com Monthly Addition Limit: Default Limit (300)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

Help for this Page

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

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

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Salesforce Setup - Users

All Users

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

View: All Users | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh	S	jwv123@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh22	S	x@x@gmail.com	SE Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh	S	jwv117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh11	S	jwv123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	<a href="#">Edit</a> S.Jagadesh22	S	jwv123@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Marketing Team

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 | Other | All

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

## Step 6:

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

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

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the Salesforce 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](#)

New [Clone](#)

Action	Permission Set Label	Description	License
<input type="checkbox"/>	<a href="#">Clone</a>	Buyer	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	<a href="#">Clone</a>	Buyer Manager	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	<a href="#">Clone</a>	CRM User	CRM User
<input type="checkbox"/>	<a href="#">Clone</a>	Commerce Admin	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	<a href="#">Clone</a>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Commerce
<input type="checkbox"/>	<a href="#">Clone</a>	Contact_Center_Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Commerce
<input type="checkbox"/>	<a href="#">Clone</a>	Contact_Center_Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Commerce
<input type="checkbox"/>	<a href="#">Del/Clone</a>	Experience Profile Manager	Salesforce
<input type="checkbox"/>	<a href="#">Clone</a>	Facility Manager	Facility Manager
<input type="checkbox"/>	<a href="#">Clone</a>	FieldServiceMobileStandardPermSet	Field Service Mobile
<input type="checkbox"/>	<a href="#">Clone</a>	Merchandise	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	<a href="#">Clone</a>	OrderManagementAgent	Lightning Order Management User
<input type="checkbox"/>	<a href="#">Clone</a>	OrderManagementOperationsManager	Lightning Order Management User

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 | [All](#)

1-25 of 30 | [Selected](#)

Page | 1 of 2

https://kiot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/home

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Q Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

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Data.com

Prospector Users

Permission Set Create

Enter permission set information

Label:  API Name:  Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

Not sure what a permission set license is? [Learn more here.](#)

License:

Save Cancel

https://kiot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

25°C Partly sunny

Q Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5\$000008Pgt%3FsfdclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

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User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Did you find what you're looking for?  
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Search

Cloud File Explorer Home Help

Video Tutorial | Help for this Page

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

Last Modified By Jagadish S. 01/10/2023, 8:24 am

Permission Set Overview

Description  
License  
Session Activation Required  
Last Modified By

Apps

Assigned Apps  
Assigned Connected Apps  
Object Settings  
App Permissions  
Apex Class Access  
Visualforce Page Access  
External Data Source Access

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5\$000008Pgt%3DsEntityPermissions

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Did you find what you're looking for?  
Try using Global Search.

25°C Partly sunny

Search

Cloud File Explorer Home Help

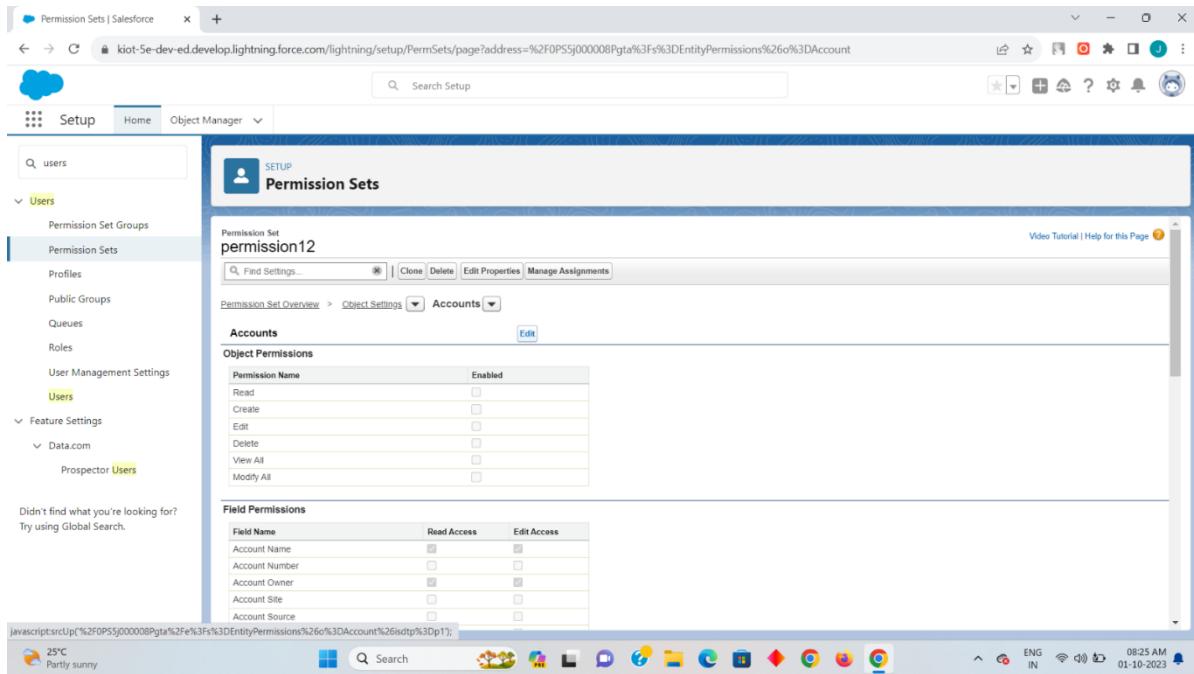
Video Tutorial | Help for this Page

Object Settings

Object Name Object Permissions Total Fields Tab Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	9	--
Accounts	No Access	44	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Activity Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assessments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invites	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--

ENG IN 08:25 AM 01-10-2023



## 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 show the Salesforce Setup interface for creating a new Permission Set named 'permission12'. The left sidebar navigation includes 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area displays the 'Object Permissions' and 'Field Permissions' sections for the 'Accounts' object. In the first screenshot, the 'Edit' permission is checked under 'Object Permissions'. In the second screenshot, the 'Edit' permission has been unchecked.

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

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

## Step 8

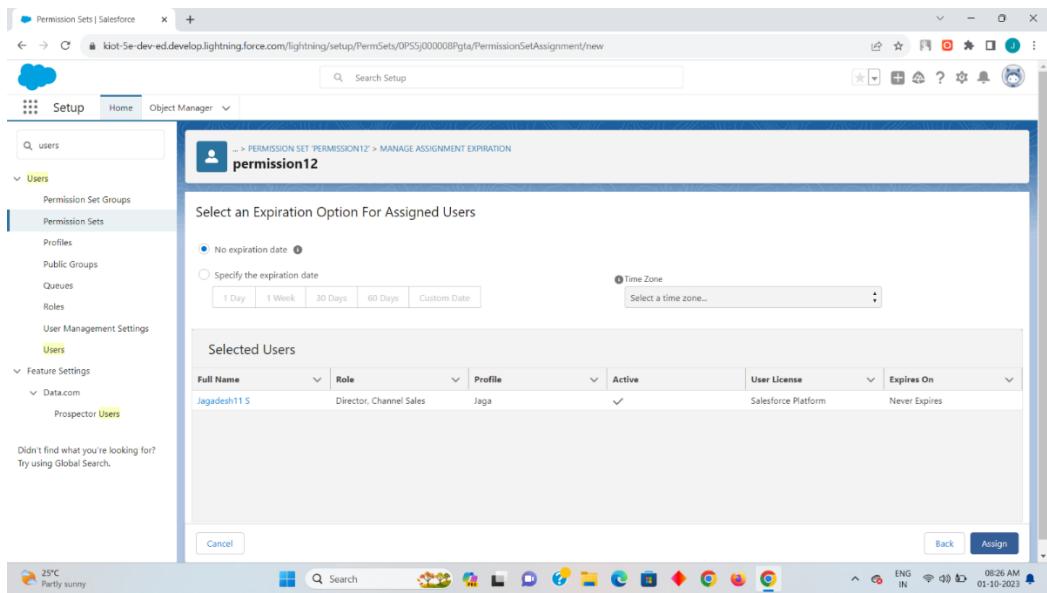
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.

The screenshot shows the 'Permission Sets | Salesforce' page. The left sidebar is expanded, showing 'Users' selected under 'Permission Sets'. The main content area is titled 'permission12' and shows a section titled 'Current Assignments' with a cactus and sun icon. Below it, a message says 'No assignments defined.' A small note at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

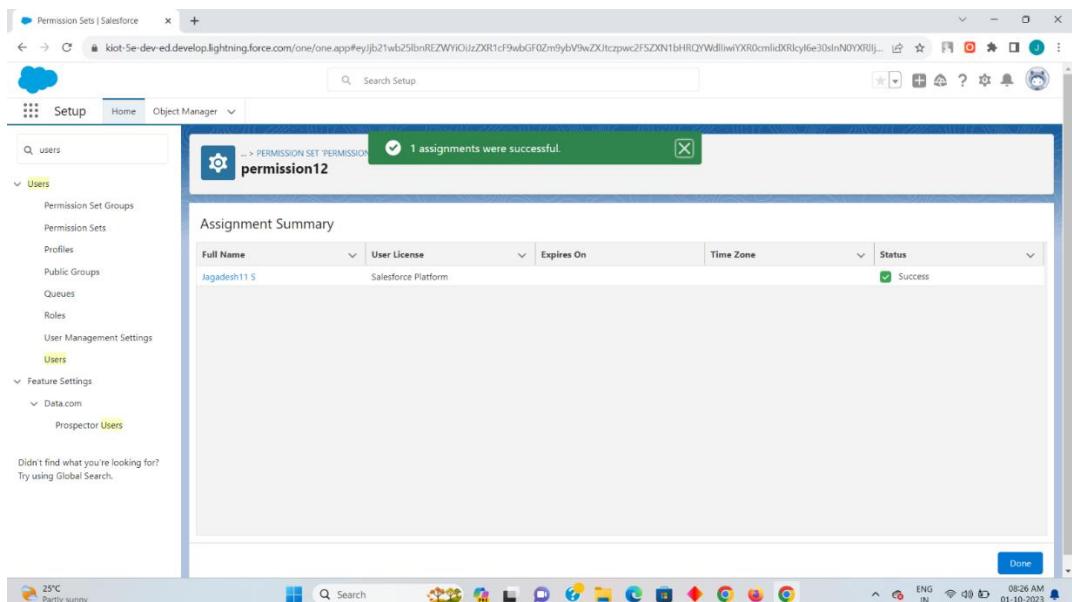
This screenshot shows the 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog. It has a header 'permission12' and a sub-header 'Select Users to Assign'. A search bar at the top right contains 'jagadesh'. The main table lists four users: Jagadesh S, Jagadesh S, Jagadesh11 S, and Jagadesh22 S. The 'Jagadesh S' row is highlighted. A tooltip above the table says 'Roles, Alias, and Profile aren't searchable. Use filters or sort on these fields instead.' Buttons for 'Cancel' and 'Next' are at the bottom.

This screenshot shows the same 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog. Now, only the first user, 'Jagadesh S', has a checked checkbox next to its name. The 'Next' button is visible at the bottom right.

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.

Email Template  
**Thank You Email - Survey**

**Details** Related

**Information**

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

**Message Content**

Subject Thank You For Completing Our Survey!	Enhanced Letterhead
HTML Value	<p>Hi {{{Survey_Result__c.Name__c}}},</p> <p>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.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>

**Additional Information**

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

## Step 3: Create an Email Alert

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

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

Survey - Thank You Email

Description: Survey - Thank You Email

Unique Name: Survey\_Thank\_You\_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Recipient Type: Email Field: Email

Available Recipients:

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

Selected Recipients:

- Email Field: Email

You can enter up to five (5) email addresses to be notified.

From Email Address: Current User's email address

Make this address the default From email address for this object's email alerts.

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

- 1. Click Setup.**

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

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

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

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

Edit Create Records

Create Salesforce records using values from the flow.

\* Label: Save Response      \* API Name: Save\_Response

Description:

How Many Records to Create  
 One  
 Multiple

How to Set the Record Fields  
 Use all values from a record  
 Use separate resources, and literal values

Create a Record of This Object  
\* Object: Survey Result

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text" value="A_a Comment"/>
Email__c	<input type="text" value="A_a Email &gt; Value"/>
Name__c	<input type="text" value="(!Name.firstName) (!Name.lastName)"/>
Rating__c	<input type="text" value="A_a Rating"/>

+ Add Field     Manually assign variables

Cancel    Done

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

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

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

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

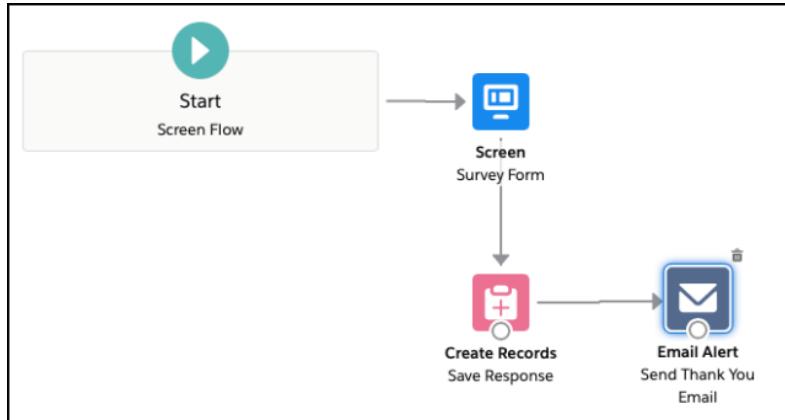
### 5.Click Done.

Edit "Survey - Thank You Email" email alert

Use values from earlier in the flow to set the inputs for the "Survey - Thank You Email" email alert. To use its outputs later in the flow, store them in variables.

*Label	*API Name
Send Thank You Email	Send_Thank_You_Email
Description	
Set Input Values	
Aa * Record ID (!Save_Response)	
<span style="float: right;">Cancel</span> <span style="background-color: #0070C0; color: white; padding: 2px 5px; border-radius: 5px;">Done</span>	

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

\* Type  
Screen Flow

\* API Version for Running the Flow  
51

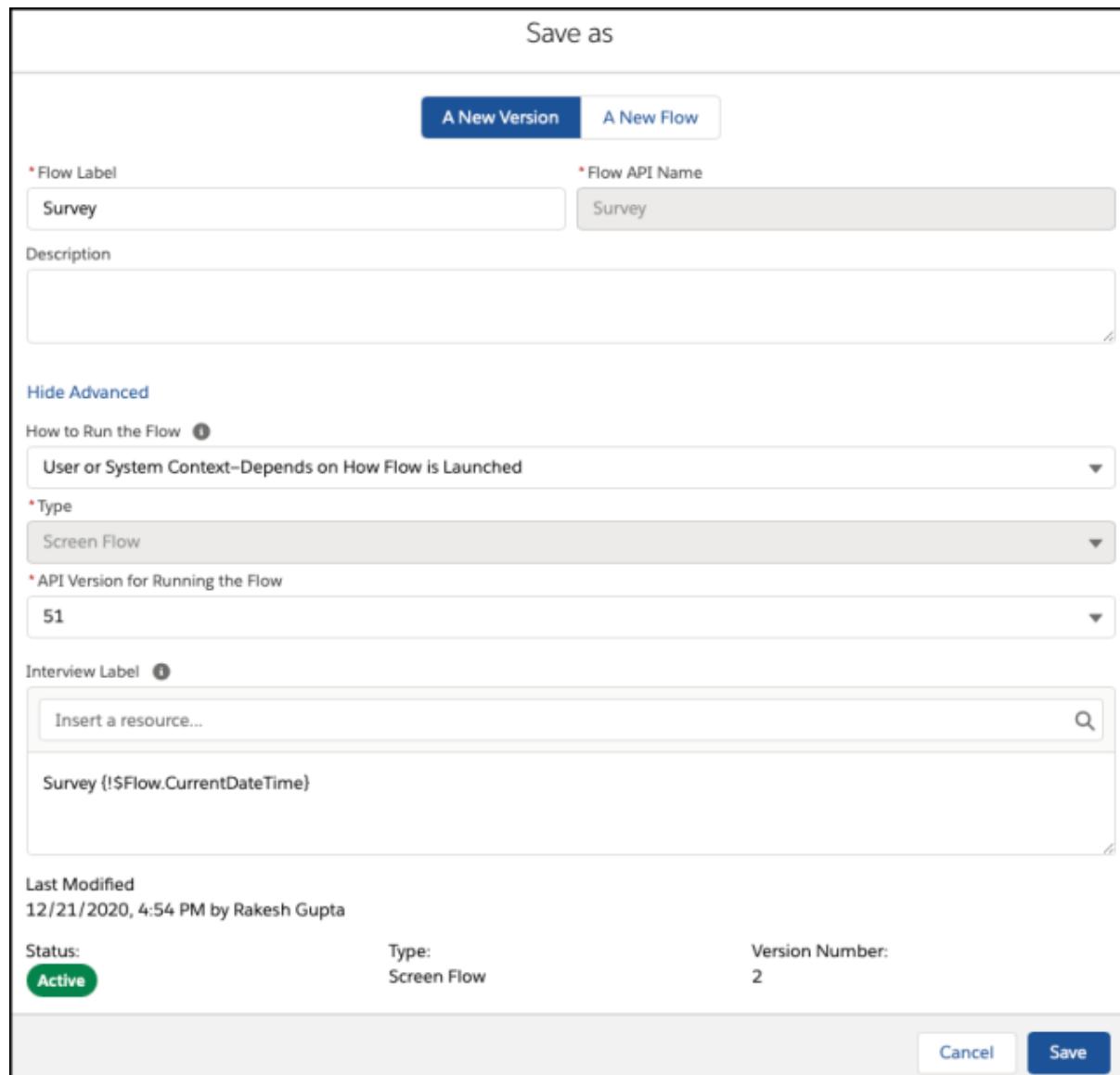
Interview Label i  
Insert a resource... 🔍

Survey {!\$Flow.CurrentDateTime}

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

Status: Active Type: Screen Flow Version Number: 2

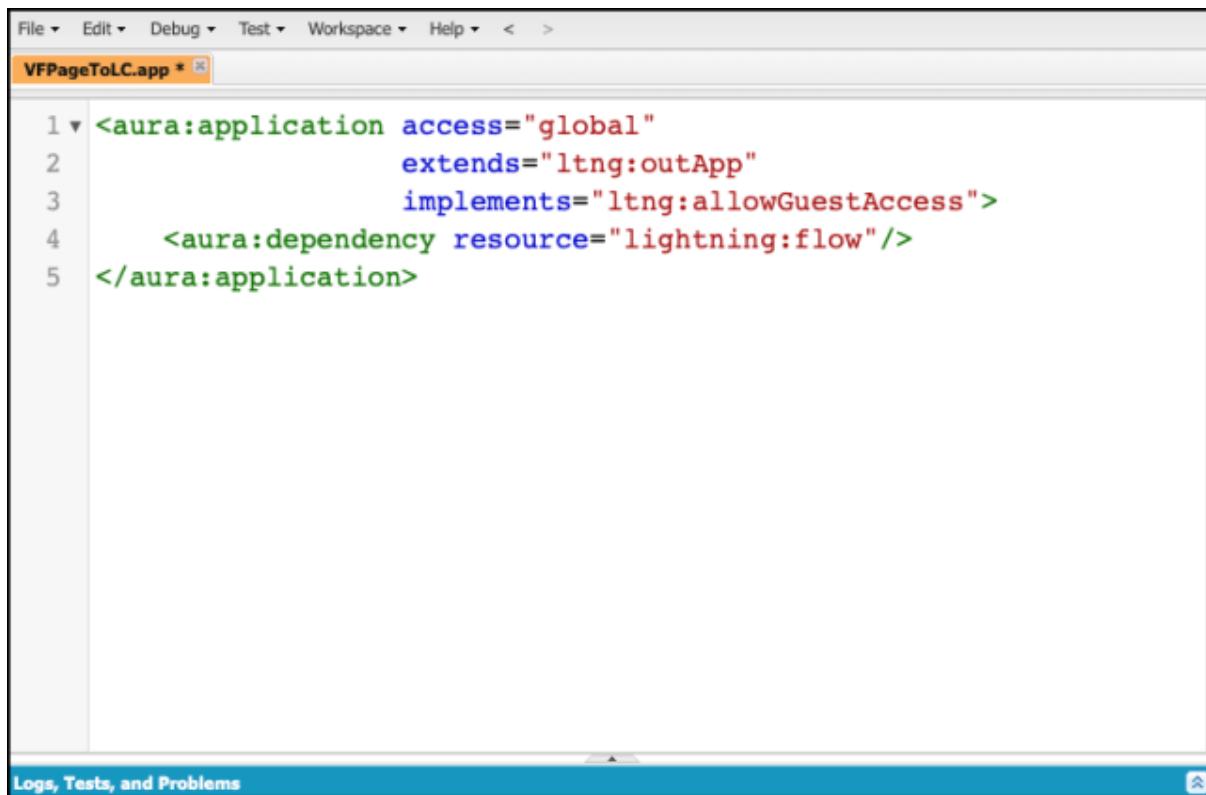
Cancel Save



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

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

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



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 active. 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 for a page named 'Survey'. The 'Page Information' section includes fields for Label ('Survey'), Name ('Survey'), and Description. Under 'Available for Lightning Experience, Experience Builder sites, and the mobile app', the checkbox is checked. The 'Visualforce Markup' tab is selected, showing 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") {
                ...
            }
        }
    }
};
$Lightning.use("c:VFFPageToLC", 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**.

**Site Edit**

**Save** **Cancel**

Site Label	Survey	
Site Name	Survey	
Site Description	   	
Site Contact	Rakesh Gupta	
Default Record Owner	Rakesh Gupta	
Default Web Address	http://kathiarch-developer-edition.gus.force.com/survey	
Active	<input checked="" type="checkbox"/>	
Active Site Home Page	Survey	[Preview]
Inactive Site Home Page	InMaintenance	[Preview]
Site Template	SiteTemplate	
Site Robots.txt	   	
Site Favorite Icon	   	
Analytics Tracking Code	   	
URL Rewriter Class	   	
Enable Feeds	   	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	
Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/>	
Lightning Features for Guest	<input checked="" type="checkbox"/>	
Users	   	
Upgrade all requests to HTTPS	<input checked="" type="checkbox"/>	
Enable Content Sniffing Protection	<input checked="" type="checkbox"/>	
Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/>	
Referrer URL Protection	<input checked="" type="checkbox"/>	
Guest Access to the Payments API	   	

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 [bj9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com](#)  
to me 

8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,  
Automation Champion