

Naan Mudhalvan
Salesforce Developer(Course)
Assignment no 1

Name : Sharmila S
Naan Mudhalvan id : au611420104072
Year & Dep : 4th year & CSE
Batch : 2024
Zone no : Zone 8

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

Solution:

Step 1: Create Custom Objects

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

Setup

Home

Object Manager

Search Setup

Setup

New Custom Object

Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Get more info!](#) [Don't show this message again](#)

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Content Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type

Optional Features

☐ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing [Learn more](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

What is this?

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

☐ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

SaveSave & NewCancel

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

Step 2: Create a Master-Detail Relationship

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

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

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

SETUP > OBJECT MANAGER

CDepartment

Details

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

Details

Description

API Name
CDepartment__c
Custom
✓
Singular Label
CDepartment
Plural Label
CDepartments

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

EditDelete

SETUP > OBJECT MANAGER

CDepartment

Details

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

New Relationship

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

PreviousNextCancel

Field Labelcollege

Field Namecollege

Description

Help Text

Child Relationship NameCDepartments

Sharing Setting

Select the minimum access level required on the Master record to create, edit, or delete related Detail records.
☒ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
☐ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

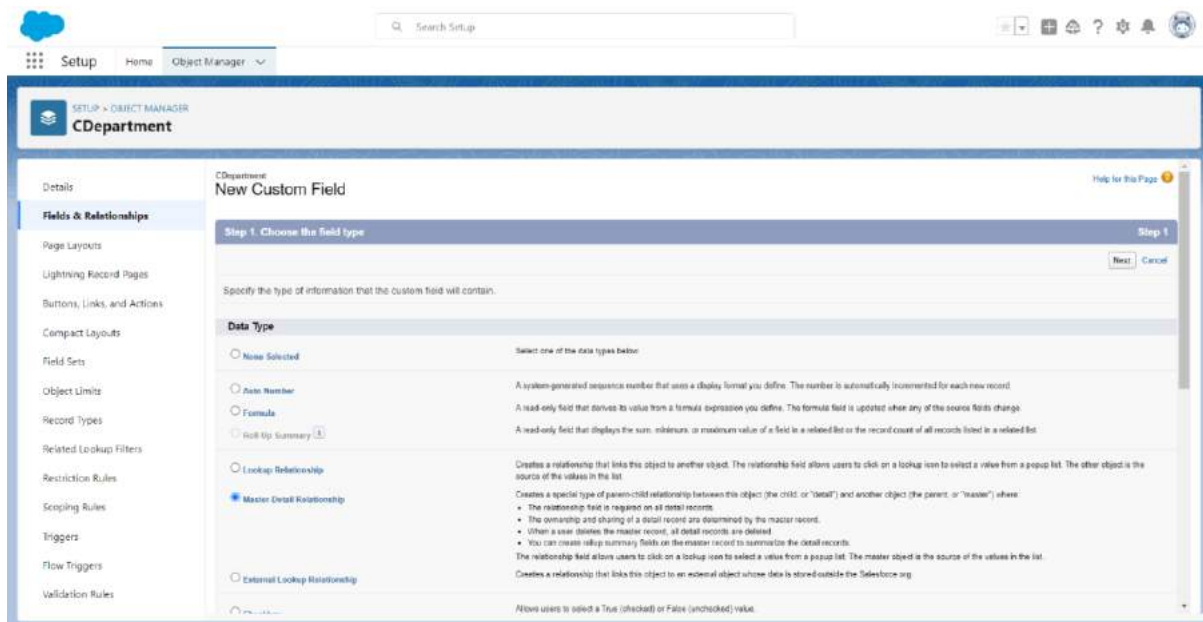
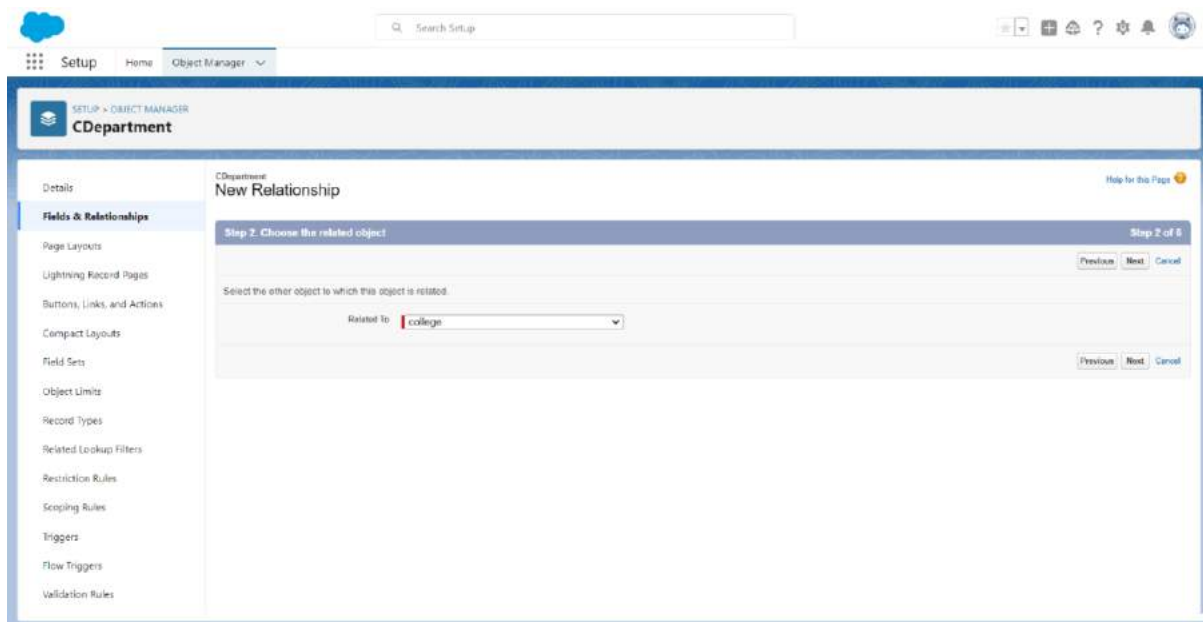
Allow reparenting

☐ Child records can be reparented to other parent records after they are created.

Auto add to custom report type

☒ Add this field to existing custom report types that contain this entity.

Lookup Filter

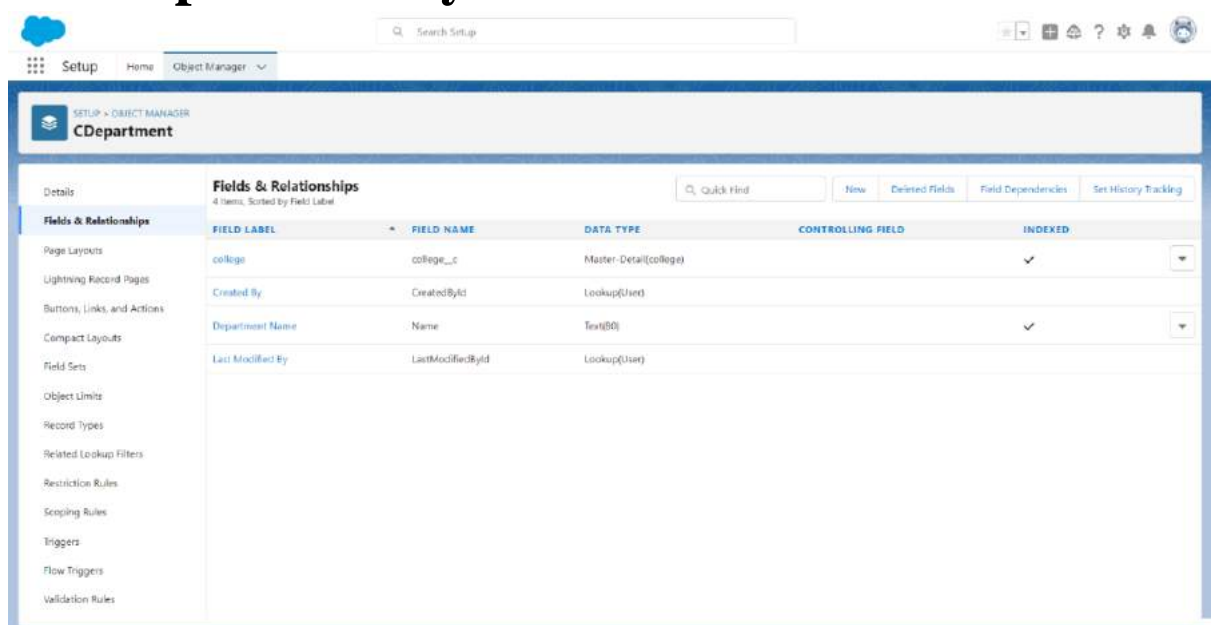


Step 3: Create the Roll-Up Summary Field

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

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

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



The screenshot shows the Salesforce Setup interface for a user named 'colle'. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'college' and 'New Custom Field'. It shows 'Step 5. Add to page layouts' of a 5-step wizard. A table lists the field details: Field Label 'Total count', Data Type 'Roll-Up Summary', Field Name 'Total_count', and Description. Below the table, it instructs the user to select page layouts that should include this field. Two checkboxes are shown: 'Add Field' (checked) and 'Page Layout Name' (checked), with 'college Layout' selected. At the bottom, it says 'When finished, click Save & New to create more custom fields, or click Save if you are done.' The wizard has buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

Setup

Home

Object Manager

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Step 5. Add to page layouts

Field Label: Total count

Data Type: Roll-Up Summary

Field Name: Total_count

Description:

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

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

☒ Add Field

☒ Page Layout Name

college Layout

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

Previous Save & New Save Cancel

cloud

Setup Home Object Manager

college

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

college

New Custom Field

Help for this Page

Step 4. Establish field-level security

Previous Next Cancel

Field Label	Total count
Data type	Roll-Up Summary
Field Name	Total_count
Description	
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.	
Field-Level Security for Profile	<input type="checkbox"/> Visible <input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Cross Org Data Picky User	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
customer	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Finance.com - App Subscription User	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

cloud

Setup Home Object Manager

college

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

college

New Custom Field

Help for this Page

Step 3. Define the summary calculation

Previous Next Cancel

Select Object to Summarize

Master Object college

Summarized Object CDDepartments

Required Information

Select Roll-Up Type

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate

Filter Criteria

☒ All records should be included in the calculation

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

Previous Next Cancel

cloud

call

Setup

Home

Object Manager

college

college

Setup > OBJECT MANAGER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 2: Enter the details

Step 2 of 3

Previous

Next

Cancel

Field Label

Total count

Field Name

Total_count

Description

Help Text

Auto add to custom report type

☒ Add this field to existing custom report types that contain this entity

Previous

Next

Cancel

cloud

call

Setup

Home

Object Manager

college

college

Setup > OBJECT MANAGER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 1: Choose the field type

Step 1

Next

Cancel

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

Data Type

☐ None Selected

Select one of the data types below

☐ Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☒ Roll Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

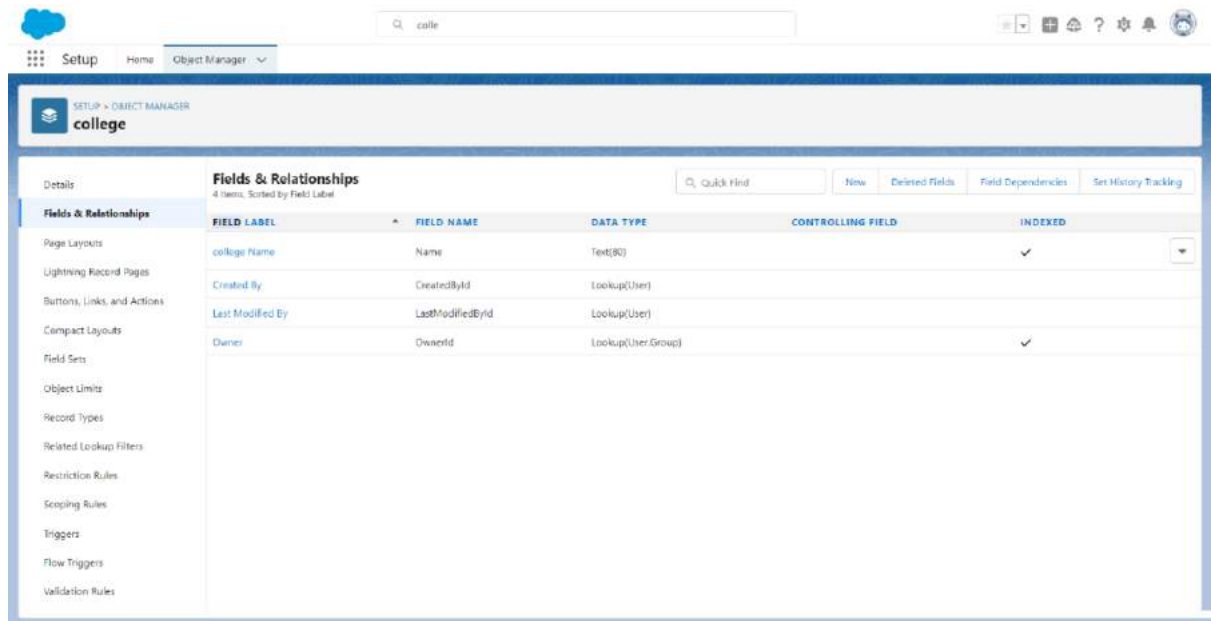
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ External Lookup Relationship

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

☐ Boolean

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



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.

Setup Home Object Manager

Search Setup

Setup Tabs

Q tabs

User Interface

Rename Tabs and Labels

Tab

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

Help for this Page

Step 2 of 3

Step 2. Add to Profiles

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.

☒ Apply one tab visibility to all profiles **Default On**

☐ Apply a different tab visibility for each profile

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

Previous Next Cancel

Setup

Home

Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Tab

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

SETUP

Tabs

New Custom Object Tab

Help for this Page

Step 1. Enter the Details

Step 1 of 3

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

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

Object: college

Tab Style: JENSEI

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: --None--

Enter a short description.
Description:

Next Cancel

Setup

Home

Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Tab

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

SETUP

Tabs

Step 3. Add to Custom Apps

Step 3 of 3

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

Custom App	Include Tab
Platform (standard__Platform)	<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"/>
Service Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Site)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningImplementation)	<input checked="" type="checkbox"/>
Digital Experiences (standard__SalesforceUX)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
Self Solutions (standard__LightningSelf)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

Previous Save Cancel

Setup

Home

Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Tab

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

SETUP

Tabs

Help for this Page

New Custom Object Tab

Step 1 of 3

Step 1. Enter the Details

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

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

Object:

CD Department

Tab Style:

Lightning

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link:

None

Enter a short description.
Description:

Next Cancel

Setup

Home

Object Manager

Search Setup

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Packaging

Installed Packages

SETUP

Lightning Experience App Manager

New Lightning App

New Connected App

20 items • Sorted by App Name • Filtered by All app:users - TabSet Type

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

Setup

Home

Object Manager

Search Setup

Setup

Home

Object Manager

tabs

Renaming Tabs and Labels

Tab

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tab

Custom Tabs

Help for this Page

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

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

Custom Object Tabs

New What is This?

Action	Label	Tab Style	Description
Edit New	Book1	Box	
Edit New	Comments	Lightning	
Edit New	colleges	Smart	
Edit New	Research Proposal	Lightning	
Edit New	united	Box	

Web Tabs

New What is This?

No Web Tabs have been defined

Visualforce Tabs

New What is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New What is This?

No Lightning component tabs have been defined

Lightning Page Tabs


New What is This?


No Lightning Page Tabs have been defined


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 picture can't be displayed.


 The picture can't be displayed.

 The picture can't be displayed.

 The picture can't be displayed.

 The picture can't be displayed.

 The picture can't be displayed.

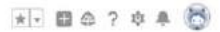
 The picture can't be displayed.

The picture can't be displayed.

MECW

My college colleges departments student Content

Search...



college
mecw

New Contact Edit New Opportunity

Related Details

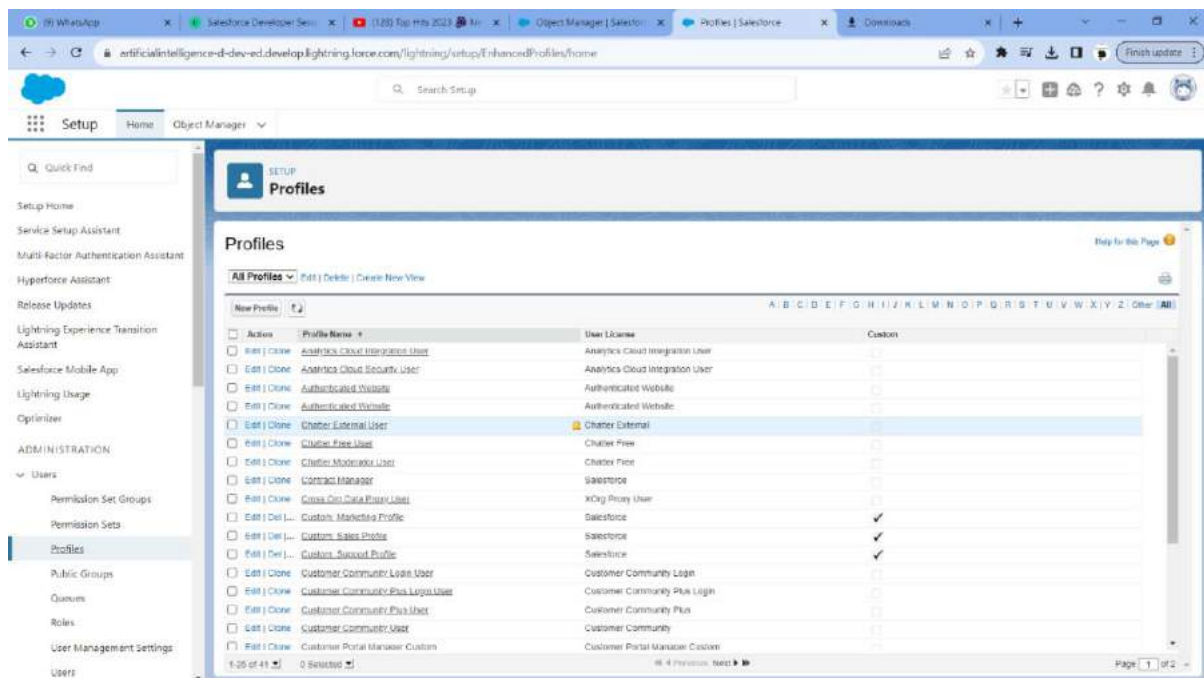
college Name	Owner
mecw	krishna s
Total count	
2	
phone	
9867116402	
Email	
krish@gmail.com	
Location	
90, 60	
Created By	Last Modified By
krishna s - 01/10/2023, 11:16 am	krishna s - 01/10/2023, 11:19 am

History

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

Solution:

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



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

Profiles

Help for this Page

All Profiles (1) Edit | Delete | Create New View

New Profile (1)		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		
<input type="checkbox"/>	Actions	Profile Name	User License	Custom
<input type="checkbox"/>	Edit Clone	Salesforce Administrator	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Salesmanager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Standard Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

1-7 of 7 0 Selected 44 Previous Next X 88 Page 1 of 1

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

Clone Profile

Help for this Page

Enter the name of the new profile

You must select an existing profile to clone from. Required Information

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

Save Cancel

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard Platform User

User License: Salesforce Platform

Profile Name:

Save Cancel

Setup Home

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

Profile Manager

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

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

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Settings Definition Access (0) | Enabled Perm Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Manager
User License	Salesforce Platform
Description	
Created By	GCBELLS 01/10/2023, 7:06 pm
Modified By	GCBELLS 01/10/2023, 7:08 pm

Page Layouts

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

Setup Profiles Manager

Set the permissions and page layouts for this profile

Profile Edit

Name: Manager
User License: Salesforce Platform
Description:
Custom Profile: ☒

Custom App Settings

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

Service Provider Access

Tab Settings

☐ Override every personal tab customizations

Standard Tab Settings: Home: Default On, Accounts: Default On, Alerts: Default On, Learning: Default On, Libraries: Tab Hidden, Lightning Bulk Solutions: Default On

Setup Profiles

Communication Subscription Channel Types

	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Strategies	<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					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Bank	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Profiles

Profile	Read	Create	Edit	Delete	View All	Modify All
Contract Point Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Profile	Read	Create	Edit	Delete	View All	Modify All
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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	Read	Create	Edit	Delete	View All	Modify All
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

Session Settings

Session Times Out After:

Session Security Level Required at Login:

Password Policies

User passwords expire in:

Enforce password history:

Minimum password length:

Password complexity requirement:

Password question requirement:

Maximum invalid login attempts:

Lockout effective period:

Obscure secret answers for password resets: ☐

Require a minimum 1 day password lifetime: ☐

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

Profiles

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

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

Session Settings

Session Times Out After:

Session Security Level Required at Login:

Password Policies

User passwords expire in:

Enforce password history:

Minimum password length:

Password complexity requirement:

Password question requirement:

Maximum invalid login attempts:

Lockout effective period:

Obscure secret answers for password resets: ☐

Require a minimum 1 day password lifetime: ☐

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

Salesforce Setup: Profiles

Custom Object Permissions

	Read	Create	Edit	Delete	View All	Modify All
Stack	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Enhancement Requests	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answers for password resets: ☐

Require a minimum 1 day password lifetime: ☐

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

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 | Edit | Create New User

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adriana Chaz	adriana	adriana_chaz@salesforce.com		<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/> Edit Login	Charles Ernst	charles	charles_ernst@salesforce.com		<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/> Edit Login	Elington, Amelia	amelia	amelia_elington@salesforce.com		<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/> Edit	S. Gordon	sg	sgordon@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	user	integration@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	security@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Setup Home Object Manager

Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer

ADMINISTRATION

Users

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

Data
Email
PLATFORM TOOLS
Apps

Setup Users

New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division

Role
User License
Profile
Active
Marketing User
Offline User
Knowledge User
Flows User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WOC User
Data.com User Type
Data.com Monthly Addition Link
Accessibility Mode (Classic-Only)
High-Contrast Palettes on Charts
Load Lightning Pages While Scrolling
Debug Mode

Role: <None Specified>
User License: Salesforce Integration
Profile: Salesforce API Only System Integrations
Active: ☒
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flows User: ☐
Service Cloud User: ☐
Site.com Contributor User: ☐
Site.com Publisher User: ☐
WOC User: ☐
Data.com User Type: <None-->
Data.com Monthly Addition Link: Default Link (200)
Accessibility Mode (Classic-Only): ☐
High-Contrast Palettes on Charts: ☐
Load Lightning Pages While Scrolling: ☒
Debug Mode: ☐

Setup Home Object Manager

Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer

ADMINISTRATION

Users

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

Data
Email
PLATFORM TOOLS
Apps

Setup Users

New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division

Role
User License
Profile
Active
Marketing User
Offline User
Knowledge User
Flows User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WOC User
Data.com User Type
Data.com Monthly Addition Link
Accessibility Mode (Classic-Only)
High-Contrast Palettes on Charts
Load Lightning Pages While Scrolling
Debug Mode

First Name: sorenson
Last Name: Data
Alias: sdata
Email: 2k20cse179@koot.ac.in
Username: 2k21a@koot.ac.in
Nickname: User169616771202564526
Title: worker
Company: koot bank
Department:
Division:

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

Browser tabs: WhatsApp, Salesforce Developer Services, 128 Top Hits 2023, Object Manager | Salesforce, Users | Salesforce, Downloads.

Address bar: artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005500000A4LxG%3Fnonredirect%3D192&lastEntityO...

Search Setup

Setup Home Object Manager

Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer

ADMINISTRATION

Users

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

Users

DATA
Email
PLATFORM TOOLS
Apps

Setup Users

User: **sowmya bala**

Permissions Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Members (0) | Queue Members (0) | Roles (0) | Role Permissions (0) | Shared Data (0) | Third Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User: Privacy Account (0)

User Detail

Name: sowmya bala Edit Starting Reset Password Login Focus

Alias: sba User License: Salesforce Platform Profile: Master Profile

Email: 2k20cet123@kot.ac.in (Verify) Username: 2k21t@kot.ac.in

Nickname: User169616771282568252616 Nickname

Title: worker Marketing User ☐

Company: KOT BANK Offlin User ☐

Department: Knowledge User ☐

Division: Flow User ☐

Address: Service Cloud User ☐

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata) Site.com Contributor User ☐

Locale: English (India) Site.com Publisher User ☐

Language: English WDC User ☐

Delegated Approver: Mobile Push Registration Data.com User Type ☐

Manager: Accessibility Mode (Classic Only) ☐

Receive Approval Request Emails: cmy it i am an approver Debug Mode ☐

Federation ID: High Contrast Palette on Charts ☐

App Registration: One-Time Password Authenticator Load Lightning Pages While Scrolling ☒

App Registration: Salesforce Authentication Salesforce CRM Content User ☒

Browser tabs: WhatsApp, Salesforce Dev..., 128 Top Hits 2..., Object Manager | Salesforce, Users | Salesforce, Downloads, Welcome to Sa..., Reset Password | X.

Address bar: <mailto:support@salesforce.com>

Gmail

Compose

Mail

Chat

Spaces

Meet

Inbox 5,318

Starred

Shocked

Sent

Drafts 6

More

Labels +

Search in mail

Active

KNOWLEDGE

1 of 6,486

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

To me

7:13 PM 10 minutes ago

salesforce

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:

<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>

Username:

2k21t@kot.ac.in

Again, welcome to Salesforce!

© Copyright 2000-2018 [salesforce.com](https://www.salesforce.com), Inc. All rights reserved. Various trademarks held by their respective owners.

artificialintelligence-d-dev-ed.develop.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&board=on&door=1&startid=Ch...

salesforce

Change Your Password

Enter a new password for **2k21n@klot.ac.in**. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password: Good

* Confirm New Password: Match

Security Question

▼ In what city were you born?

* Answer:

Change Password

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

Login | Salesforce

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

salesforce

Username:

Password:

Log In


☐ Remember me

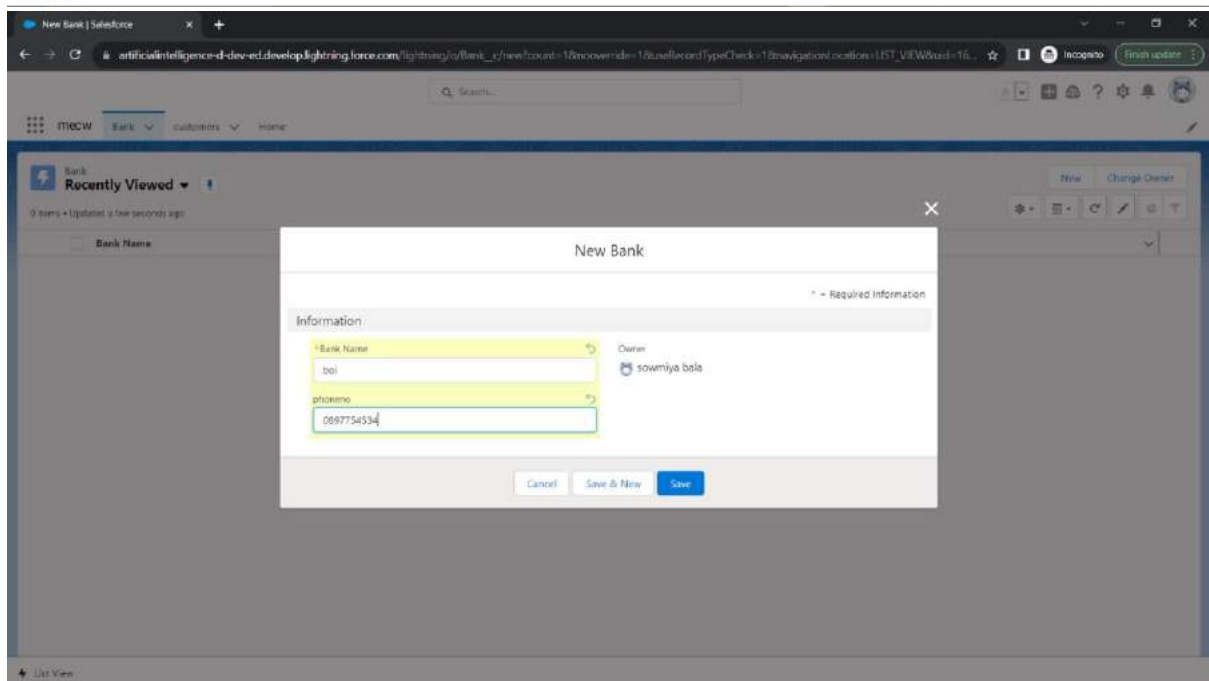
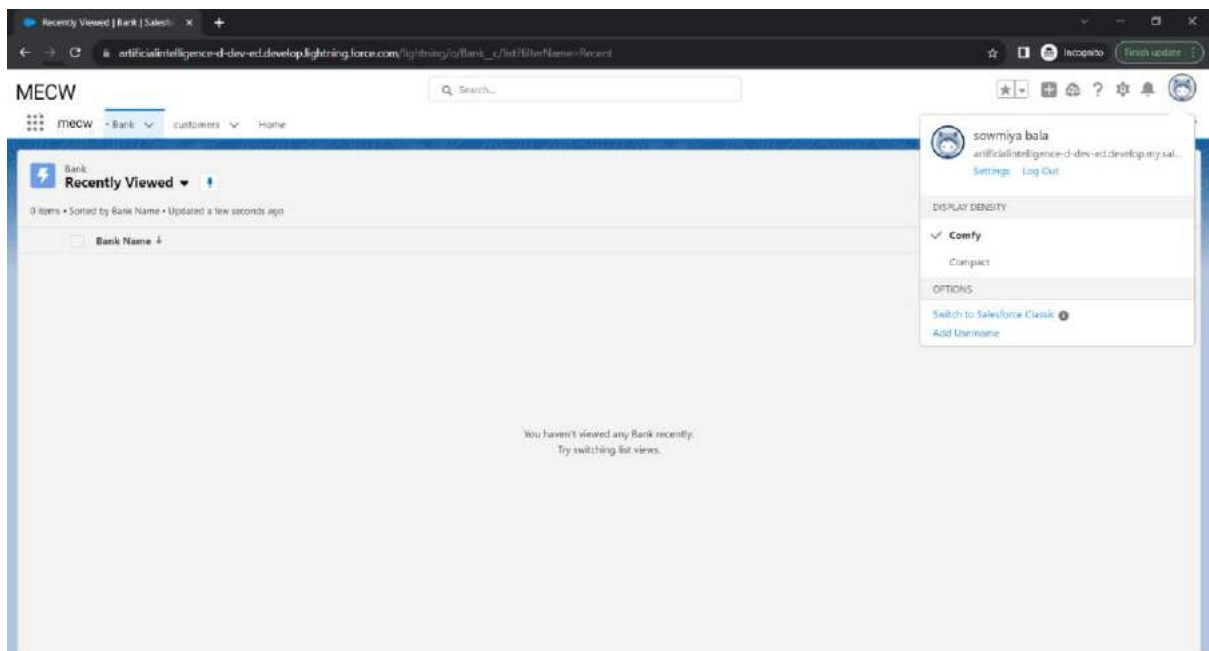
[Forgot Your Password?](#)

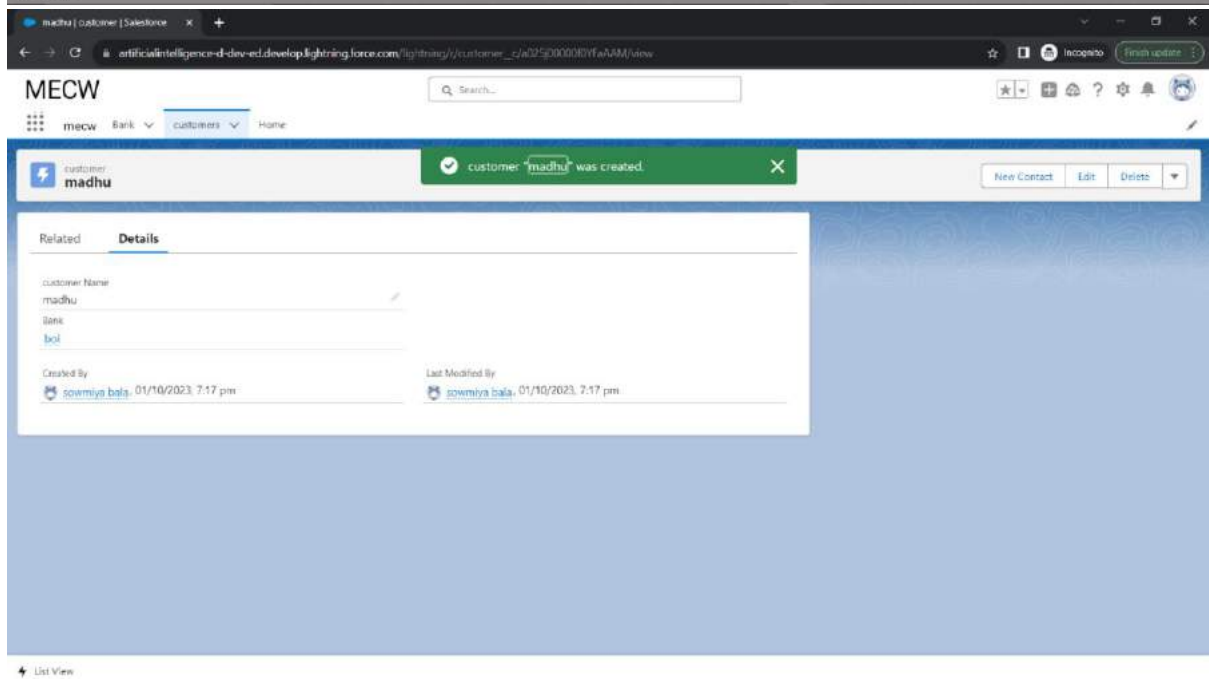
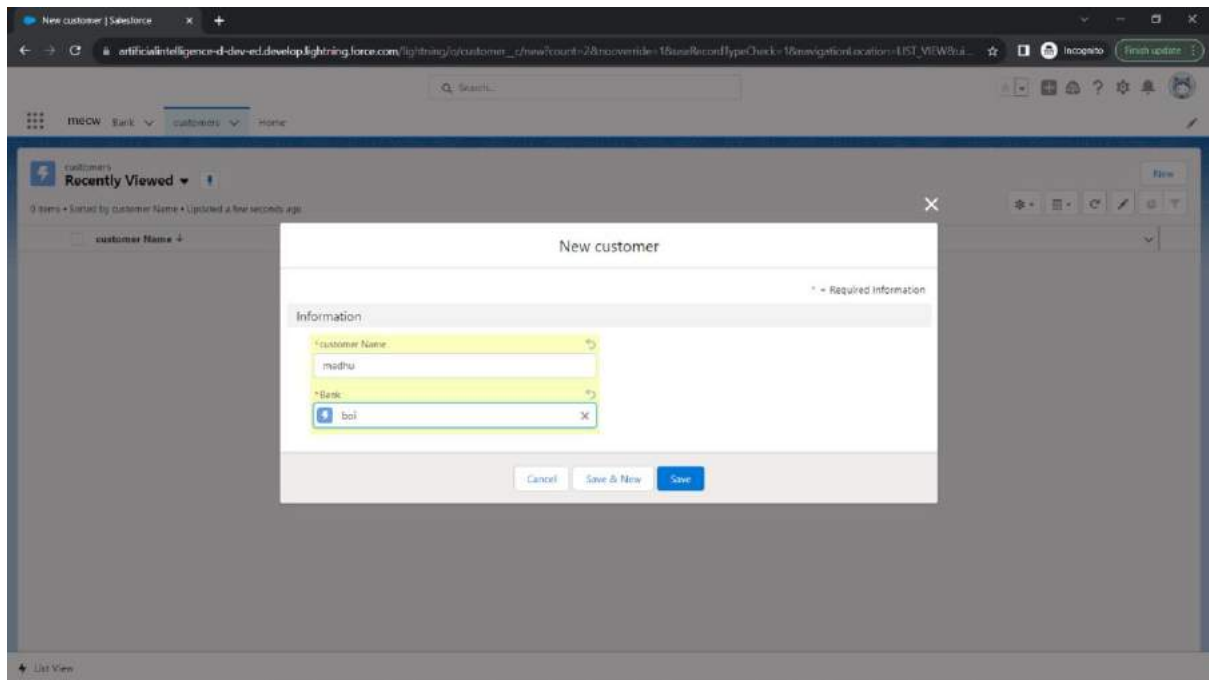
© 2023 Salesforce, Inc. All rights reserved.

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

WATCH ON DEMAND

 **AI Day**





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

Profiles

1.7 of 7 0 Selected

Actions	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Salesforce Administrator	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Salesmanager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard 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"/>

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. Required Information

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

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

Quick Find

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.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail

Name: salesmanage
User License: Salesforce Platform
Description:
Created By: GCBLS, 01/10/2023, 7:10 pm
Modified By: GCBLS, 01/10/2023, 7:10 pm

Page Layouts

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

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

Quick Find

Setup

Home

Object Manager

Profiles

Profile Edit: salesmanage

Set the permissions and page layouts for this profile.

Profile Edit

Name: salesmanage
User License: Salesforce Platform
Description:

Custom App Settings

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

Service Provider Access

Tab Settings

Override user's personal tab customizations

Standard Tab Settings

Name: Default On
Learning: Default On
Onboarding: On

Salesforce Setup: Profiles

Custom Object Permissions

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

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

Maximum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answers for password resets: ☐

Require a minimum 1 day password lifetime: ☐

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

Salesforce Setup: Profiles

Custom Object Permissions

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

Maximum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answers for password resets: ☐

Require a minimum 1 day password lifetime: ☐

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

Save Save & New Cancel

Setup Home Object Manager

Q user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

SETUP Users

Mailing Address

Street

City

Zip/Postal Code

State/Province

Country

Single Sign On Information

Federation ID

Locale Settings

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

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails Only if I am an approver

☒ Generate new password and notify user immediately

Save Save & New Cancel

Setup Home Object Manager

Q user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

SETUP Users

Mailing Address

Street 4154 - aryanpalayam, vinnarsoguram...

City SALEM

Zip/Postal Code 636308

State/Province TAMIL NADU

Country

Single Sign On Information

Federation ID

Locale Settings

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

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails Only if I am an approver

☒ Generate new password and notify user immediately

Save Save & New Cancel

Salesforce Developer Edition Setup Page

Setup > Users > User Management Settings > Users

User: madhu b

User Detail

Name	madhu b	Role	Salesforce Platform
Alias	mb	User License	Salesforce Platform
Email	2k20csit123@kiet.ac.in [Verify]	Profile	salesforce_admin
Username	2k20csit@kiet.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	USER16961804242865419206	Marketing User	<input type="checkbox"/>
Title	worker	Offline User	<input type="checkbox"/>
Company	KOI BANK	Knowledge User	<input type="checkbox"/>
Department	Sales	Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	8154, arinjodeyan, uthahesokapuram, Parakkadu, Salem-636308 SALAM, INDIA	Sales.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+5:30) India Standard Time (Asia/Kolkata)	Sales.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Notifications	<input checked="" type="checkbox"/>
Manager		Data.com User Type	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an Approver	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Colorcode ID		Debug Mode	<input type="checkbox"/>
App Registration One-Time Password		High-Contrast Palette on Charts	<input type="checkbox"/>
Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration One-Time Password		Adaptive CRM Content User	<input type="checkbox"/>

Gmail Interface

Search in mail

Compose

Inbox 5,318

Starred

Shooved

Sent

Drafts

More

Labels

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:

<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>

Username:

2k20csit@kiet.ac.in

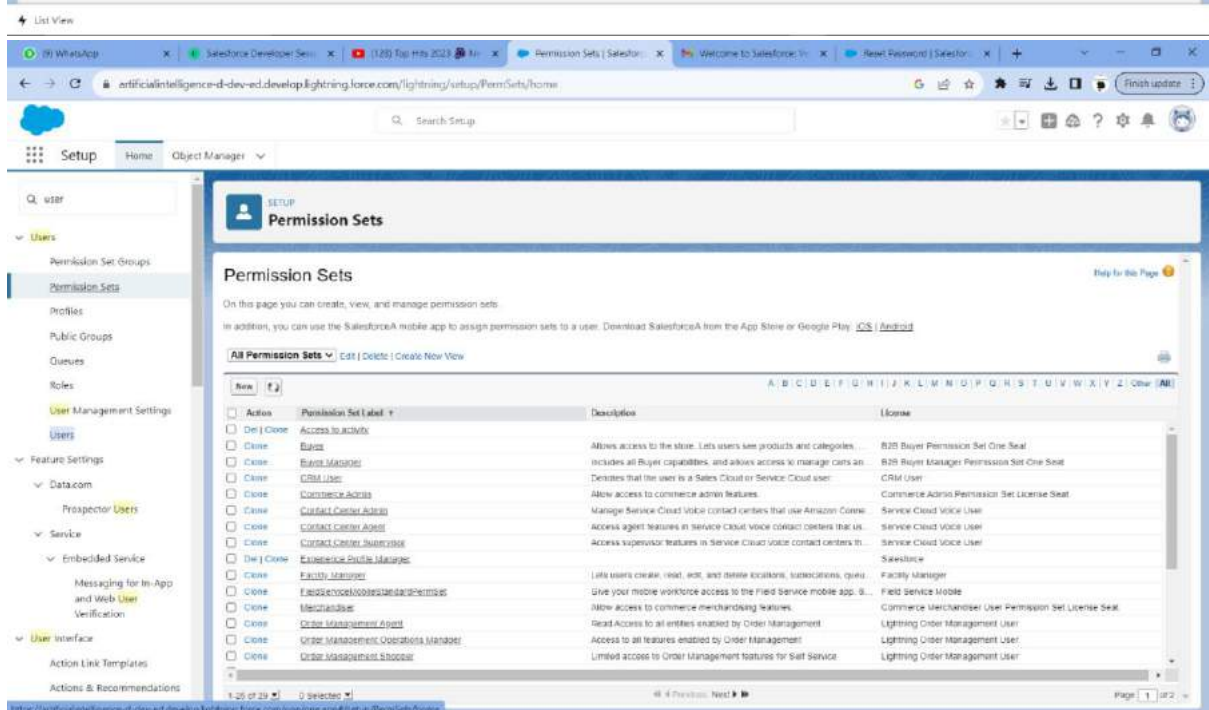
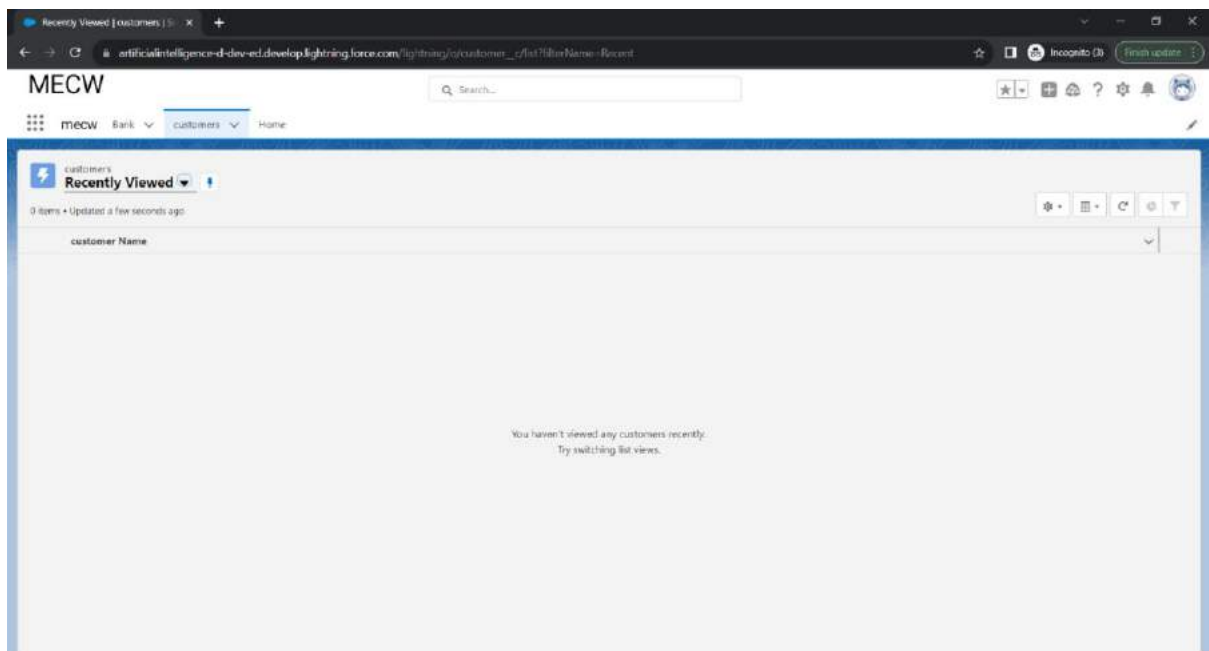
Again, welcome to Salesforce!

© Copyright 2000-2019 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.

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

Reply Forward

The screenshot displays the Salesforce Lightning Experience interface. At the top, the browser address bar shows the URL: `artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank_v2/Id/01b1Name-Recent`. The page header includes the text 'Recently Viewed | Bank | Sales' and a 'Refresh update' button. The main navigation bar features the 'MECW' logo and a menu with 'Bank', 'customers', and 'Home'. A search bar is located in the top right corner. The 'Recently Viewed' section is titled 'Bank' and shows '0 items • Updated a few seconds ago'. A message in the center of the list states: 'You haven't viewed any Bank recently. Try switching list views.' The bottom left corner contains a 'List View' button.



Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:

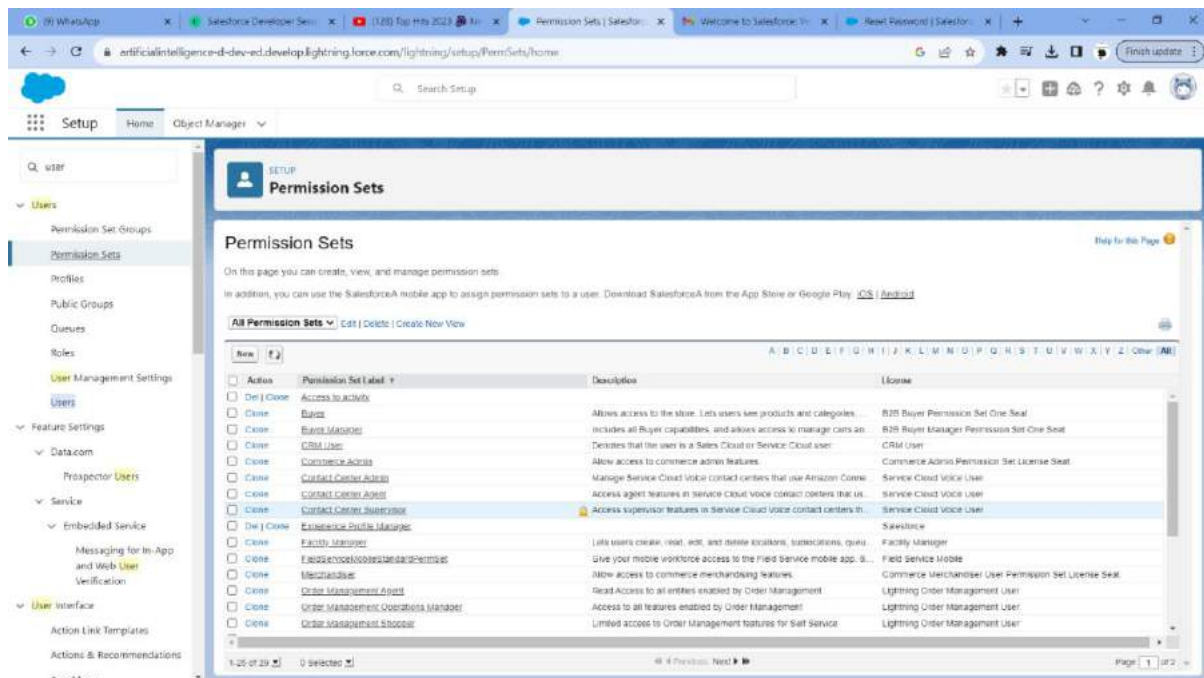
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

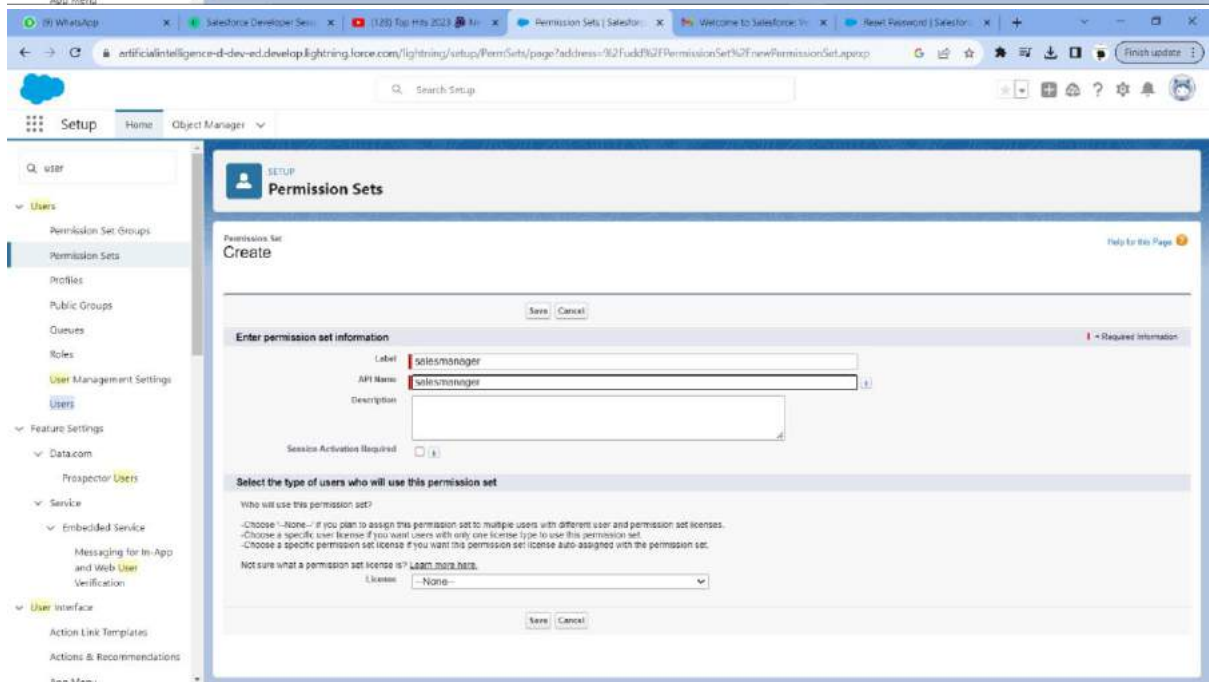
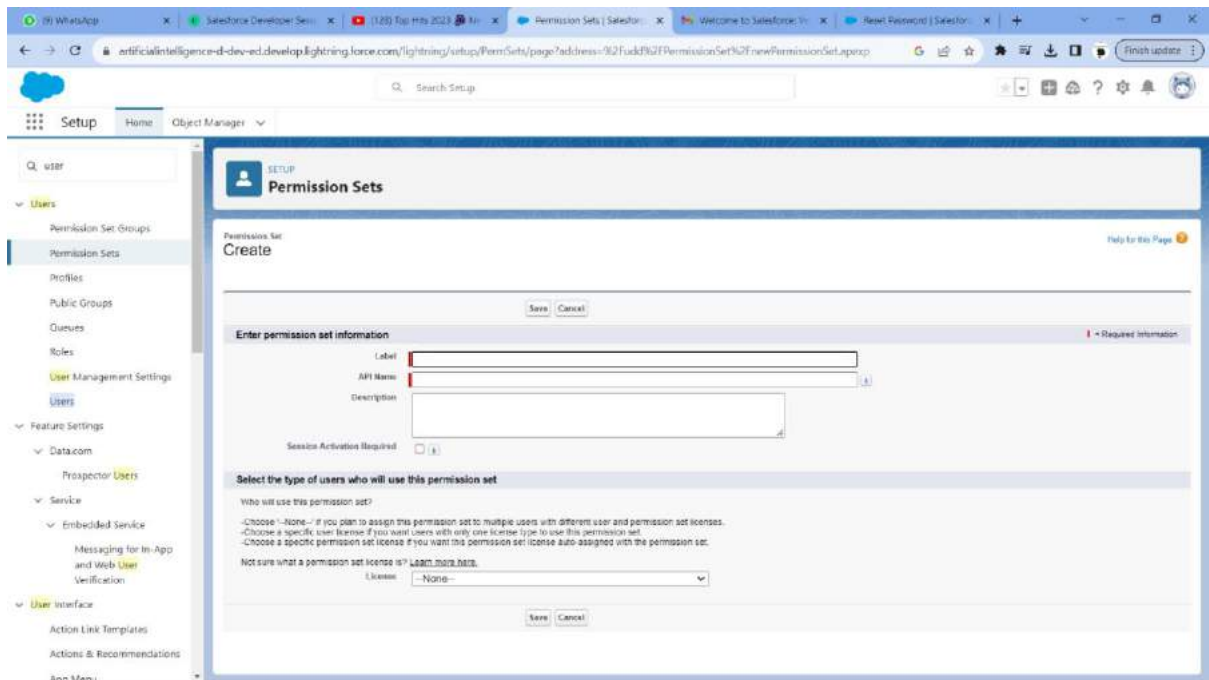
Organization-Wide Defaults:

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

Testing:

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





Setup Home Object Manager

Q user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

SETUP Permission Sets

Permission Set: salesmanager

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name
License	salesmanager
Session Activation Required	Namespace Prefix
Last Modified By: GORAL S. 01/10/2023, 7:29 pm	Created By: GORAL S. 01/10/2023, 7:29 pm

Apps

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

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

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

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

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

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

Setup Home Object Manager

Q user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations

SETUP Permission Sets

Permission Set: salesmanager

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview • **Object Settings**

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	82	—
AI Insights Reports	No Access	—	—
AI Record Insights	No Access	—	—
Alternative Payment Methods	No Access	27	—
API Attachments Event Stores	No Access	14	—
App Analytics Query Requests	No Access	—	—
Appointment Usage Assignments	No Access	—	—
Appointment Categories	No Access	5	—
Appointment Invitations	No Access	17	—
Appointment Invites	—	4	—
Appointment Schedule Appointments	No Access	—	—
Appointment Schedule Logs	No Access	—	—
Appointment Times Time Slots	No Access	9	—
Asset Actions	No Access	30	—
Asset Action Sources	No Access	10	—
Asset Relationships	—	10	—
Assets	No Access	42	—
Asset State Periods	No Access	11	—

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User
- Verification

User Interface

- Action Link Templates
- Actions & Recommendations

Permission Set: salesmanager

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Bank

Bank Edit

Tab Settings

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

Object Permissions

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

Field Permissions

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

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User
- Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Permission Set: salesmanager

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Bank

Bank Save Cancel

Tab Settings

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

Object Permissions

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

Field Permissions

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

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
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Setup - PERMISSION SET 'SALESMANAGER'

salesmanager

Current Assignments

No assignments defined.

Add Assignment

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
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Select Users to Assign

All Users

1 item selected

Search this list...

	Full Name	All...	Username	Role	Ac...	Profile
<input type="checkbox"/>	Amelia Ellington	aeEll	amelia.ellington.146kxip8oodilcd6wpcdu04whfnbdeamwshqngucprtdalv@gmail.com	<input checked="" type="checkbox"/>		Force.com - App Subscription User
<input type="checkbox"/>	Chatter Expert	Chatter	chatty00d5j0000bckkkrab.ln0hmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>		Chatter Free User
<input type="checkbox"/>	Diya Adanna	dadann	test_dya_pas_Ae0tjybr0wktstgrgibkpx.3g0f0f0v0w0s.k04Bk0z0f0m0s@gmail.com	<input checked="" type="checkbox"/>		UIMS User
<input type="checkbox"/>	GOPAL S	GS	k0t5j0h@gmail.com	<input checked="" type="checkbox"/>		System Administrator
<input type="checkbox"/>	Integration User	Integ	integration@00d5j0000bckkkrab.com	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
<input checked="" type="checkbox"/>	madhu b	mb	2420c0h@dot.ac.in	<input checked="" type="checkbox"/>		salesmanager
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j0000bckkkrab.com	<input checked="" type="checkbox"/>		Analytics Cloud Security User
<input type="checkbox"/>	sowmiye bala	sbala	24211@dot.ac.in	<input checked="" type="checkbox"/>		Manager

Cancel Next

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

Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date

Time Zone: Select a time zone...

1 Day 1 Week 30 Days 60 Days Custom Date

Selected Users

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

Cancel Back Assign

Setup Home Object Manager

Search Setup


user

Users

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

Feature Settings

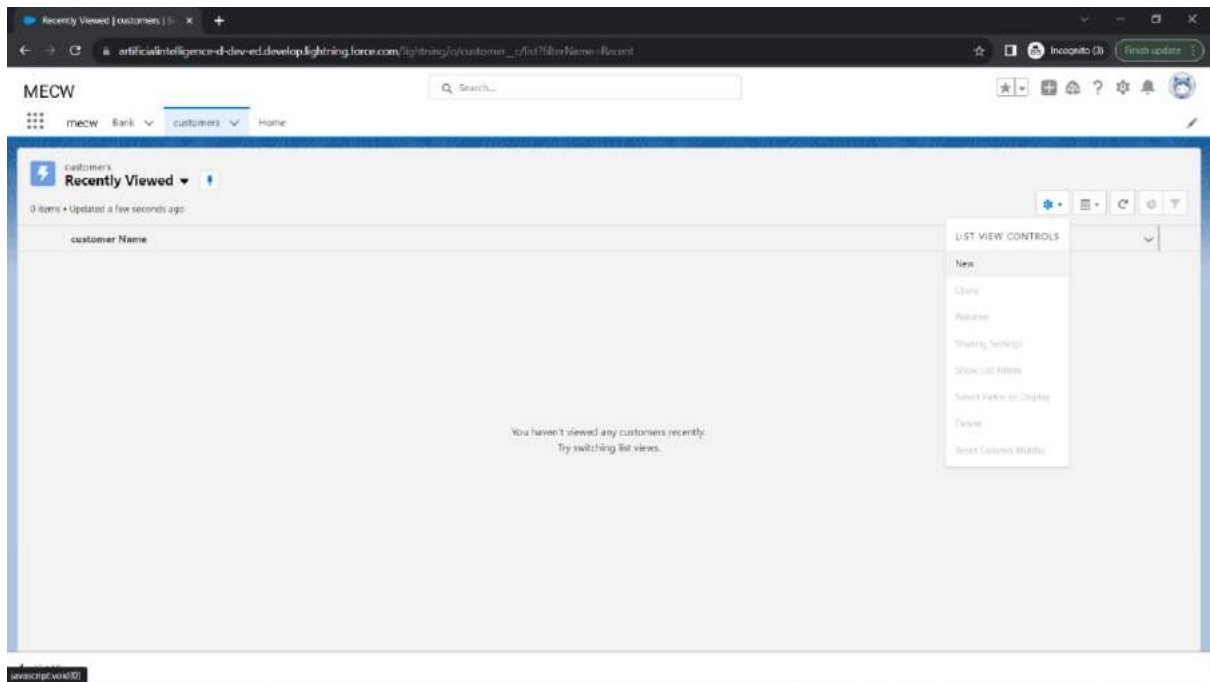
- Data.com
 - Prospector Users
- Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
- User Interface
 - Action Link Templates
 - Actions & Recommendations
 - App Menu

 **salesmanager** 1 assignments were successful

Assignment Summary

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

Done

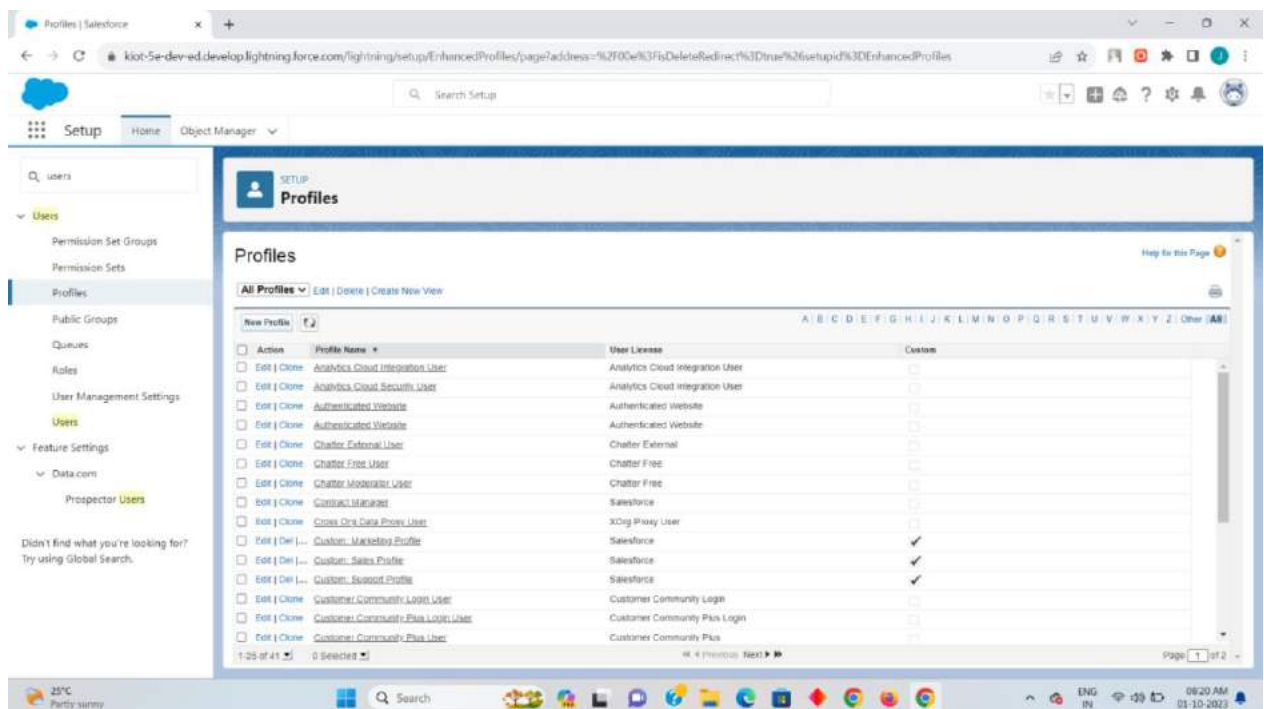


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

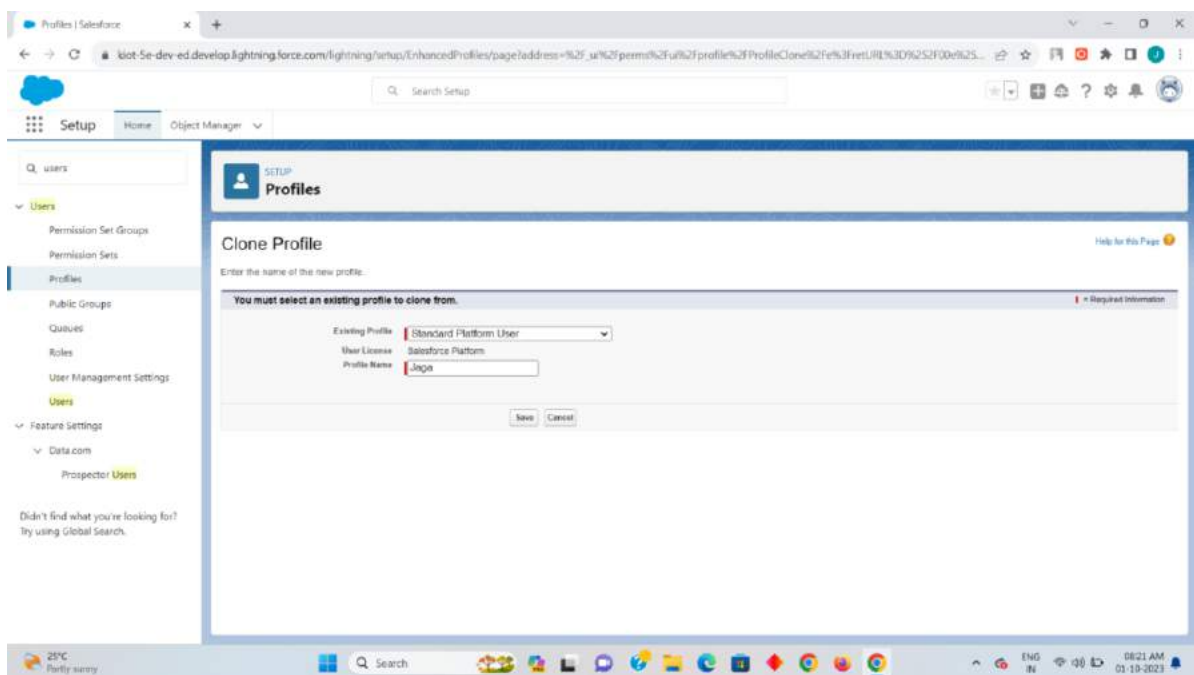
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

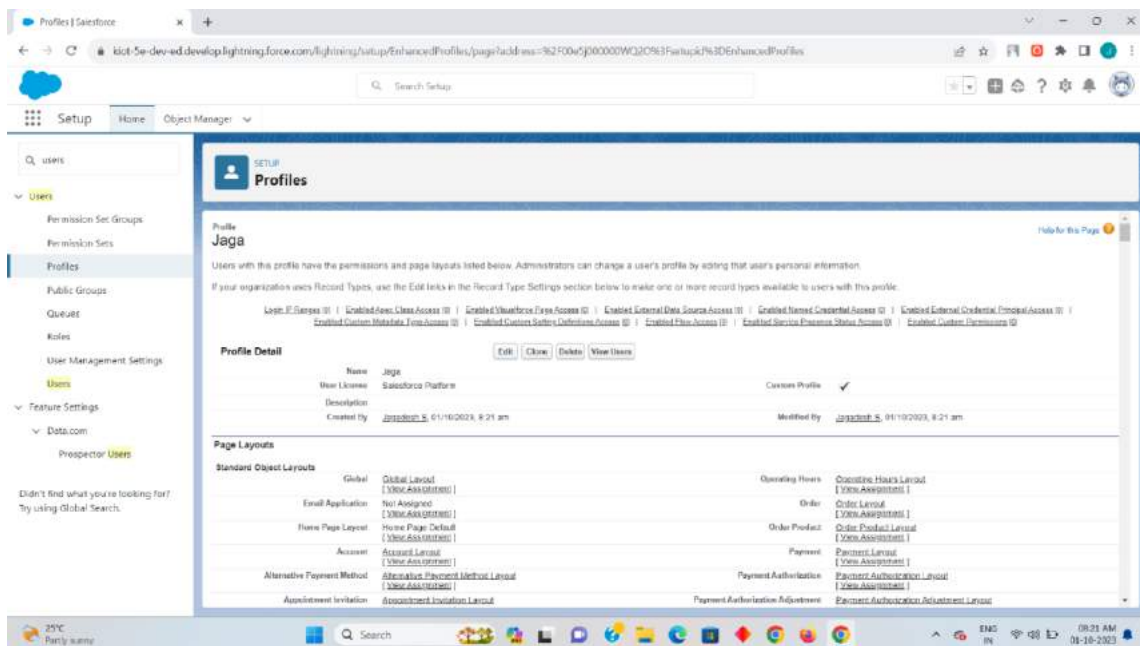
Click on the new to create a new profile along with the label and Api



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

Step 3:

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



The screenshot shows the Salesforce Setup interface for a user profile named 'Jaga'. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area is titled 'Profiles' and shows the 'Jaga' profile details. The profile is associated with the 'Salesforce Platform' license and was created by 'jprasad@S' on 01/10/2023 at 8:21 am. The 'Custom Profile' checkbox is checked. Below the profile details, there is a 'Page Layouts' section with a table of standard object layouts. The table has columns for 'Standard Object Layouts' and 'Global'. The rows include 'Global Layout', 'Email Application', 'Home Page Layout', 'Account', 'Alternative Payment Method', and 'Appointment Invitation'. Each row has a corresponding layout name and a link to edit it. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 09:21 AM on 01-10-2023.

Standard Object Layouts	Global
Global Layout	[View Assignment]
Email Application	Not Assigned [View Assignment]
Home Page Layout	Home Page Default [View Assignment]
Account	Account Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout

Profiles | Salesforce

Search Setup

Setup Home Object Manager

Users

Profiles

Custom Object Permissions

Session Settings

23°C Partly sunny

Search

ENG IN 08:21 AM 01-10-2023

Profiles

Object	Read	Create	Edit	Delete	View All	Modify All
Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Communication Subscription Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Communication Subscription Settings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Object Permissions	<input 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 Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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	Read	Create	Edit	Delete	View All	Modify All
Providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Timeout 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: ☐

Require login IP restrictions: ☐

Skip employee device activation during Experience Cloud site login: ☐

Profiles | Salesforce

Search Setup

Setup Home Object Manager

Users

Profiles

Custom Object Permissions

Session Settings

23°C Partly sunny

Search

ENG IN 08:21 AM 01-10-2023

Profiles

Object	Read	Create	Edit	Delete	View All	Modify All
Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Communication Subscription Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Communication Subscription Settings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Object Permissions	<input 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 Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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	Read	Create	Edit	Delete	View All	Modify All
Providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resources	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Timeout After: 2 hours of inactivity

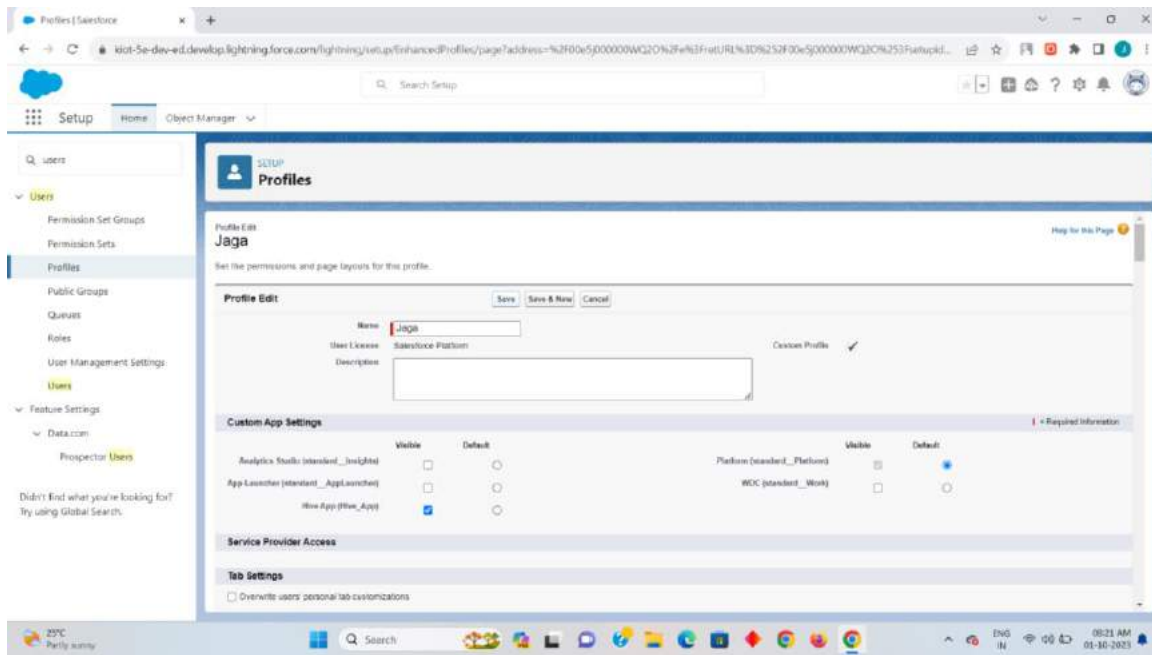
Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees: ☐

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

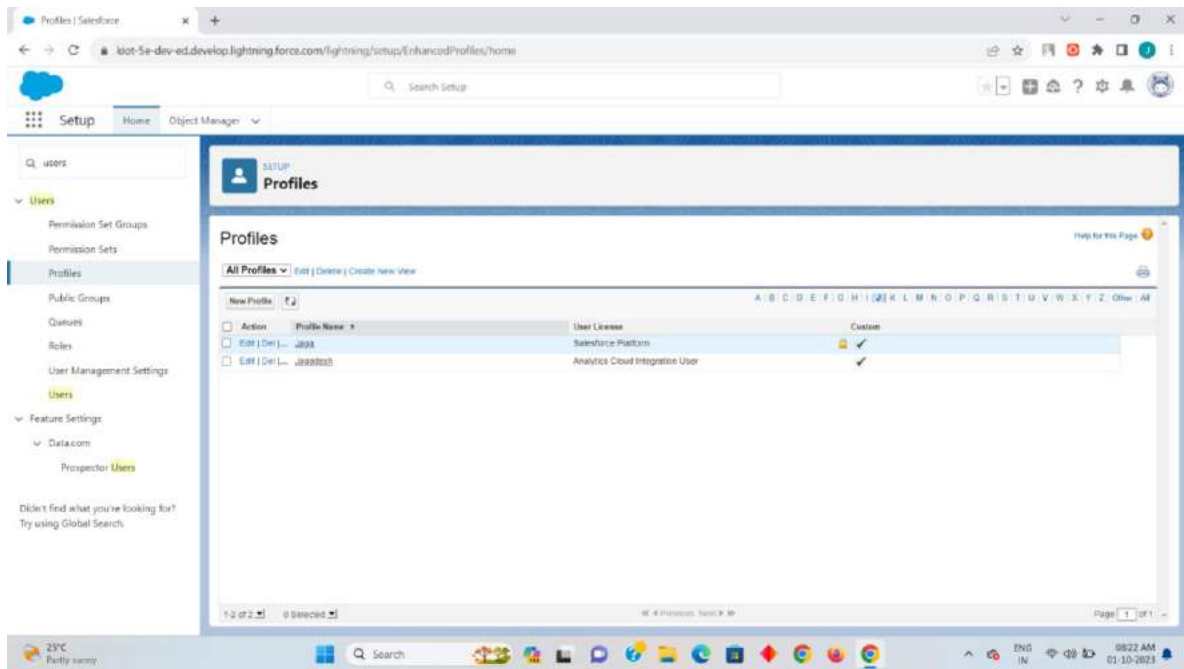
Require login IP restrictions: ☐

Skip employee device activation during Experience Cloud site login: ☐



Step 4

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



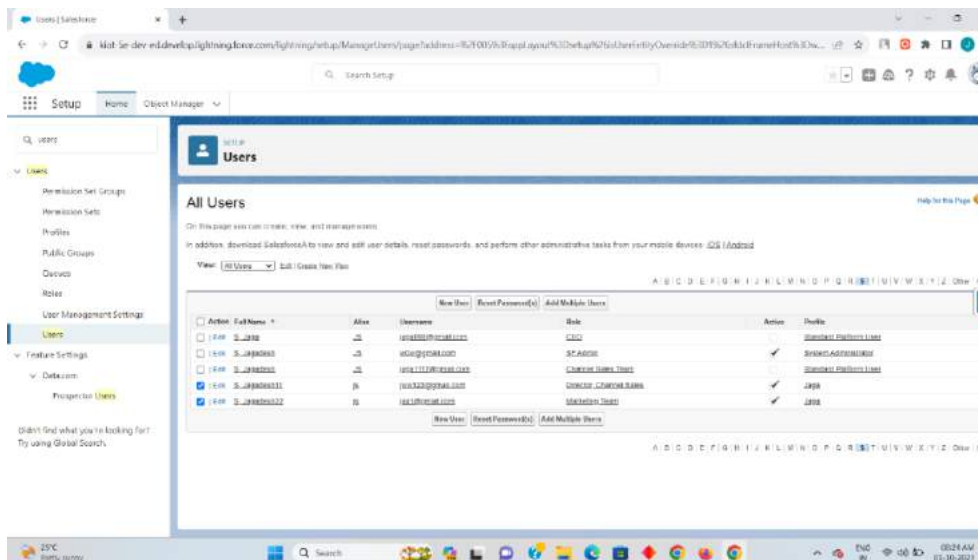
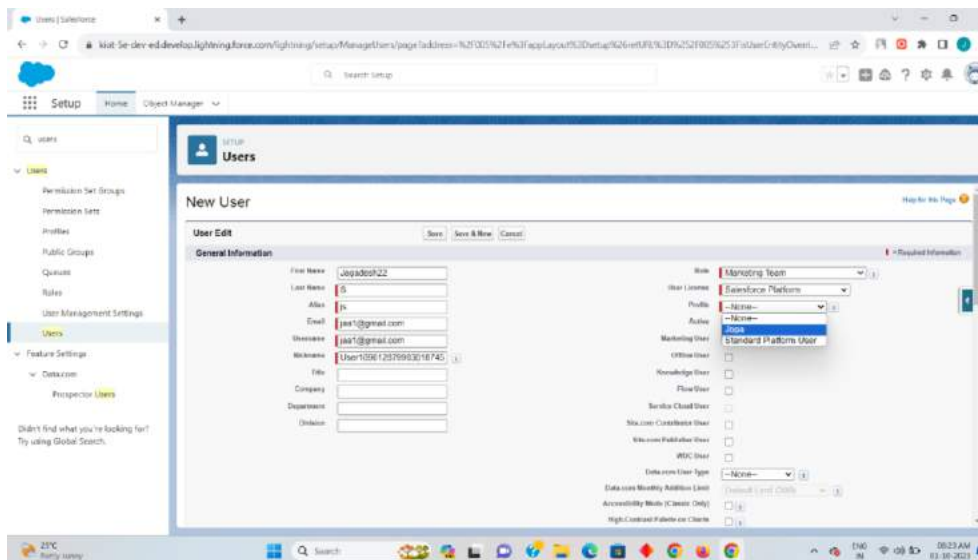
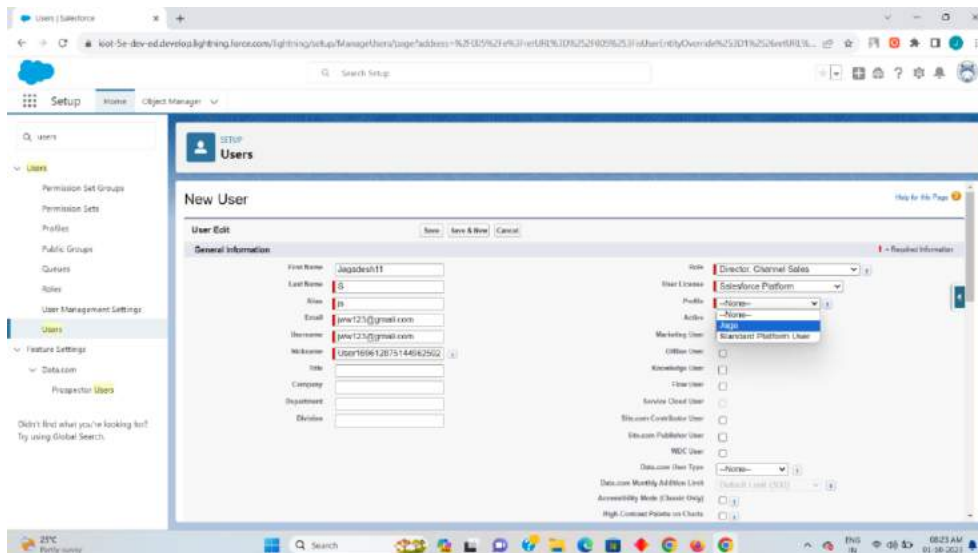
Step 5:

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

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

The screenshot shows the Salesforce Setup page for managing users. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area is titled 'All Users' and includes a search bar and a 'Help for this Page' link. Below the title, there is a section for 'View: All Users' and a 'Create New User' button. The table below lists the following users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Edget	Chatter	chatter_00d50000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Gary_Jack	Jack	gary_jack_7f0d0000000000000000000000000000@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	Jaga	Jaga	jaga0000@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Jaga2	Jaga	jaga0000@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Jaga3	Jaga	jaga0000@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Jaga4	Jaga	jaga0000@gmail.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Jaga5	Jaga	jaga0000@gmail.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User



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

Step 6:

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

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

Permissions Sets | Salesforce

kiot-se-dev-ed.develop.lightning.force.com/lightning/setup/permsets/home

Search Setup

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

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

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 | [Add](#) | [Delete](#) | [Create New View](#)

Row	Label	Description	License
<input type="checkbox"/>	Admin	Allows access to the store. Lets users see products and categories, includes all Buyer capabilities, and allows access to manage carts on devices that the user is a Sales Cloud or Service Cloud user.	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	B2B Buyer Manager		B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User		CRM User
<input type="checkbox"/>	Commerce Admin	Allows access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Service Cloud Voice Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Service Cloud Voice Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Service Cloud Voice Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Salesforce		Salesforce
<input type="checkbox"/>	Field Service Mobile	Lets users create, read, edit, and delete locations, appointments, and tasks.	Field Service Mobile
<input type="checkbox"/>	Field Service Mobile - Provisioning	Give your mobile workforce access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/>	Commerce User Manager	Allows access to commerce merchandising features.	Commerce User Manager User Permission Set License Seat
<input type="checkbox"/>	Order Management Agent	Read access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management.	Lightning Order Management User

1:25 of 70 0 Selected 4 Products New

Page 1 of 2

29°C Partly sunny

08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-se-dev-ed.develop.lightning.force.com/lightning/setup/permsets/pageaddress=7627udd962fPermissionSet627newPermissionSet.apexp

Search Setup

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

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

Permission Sets

Create

Save Cancel

Enter permission set information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

-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.](#)

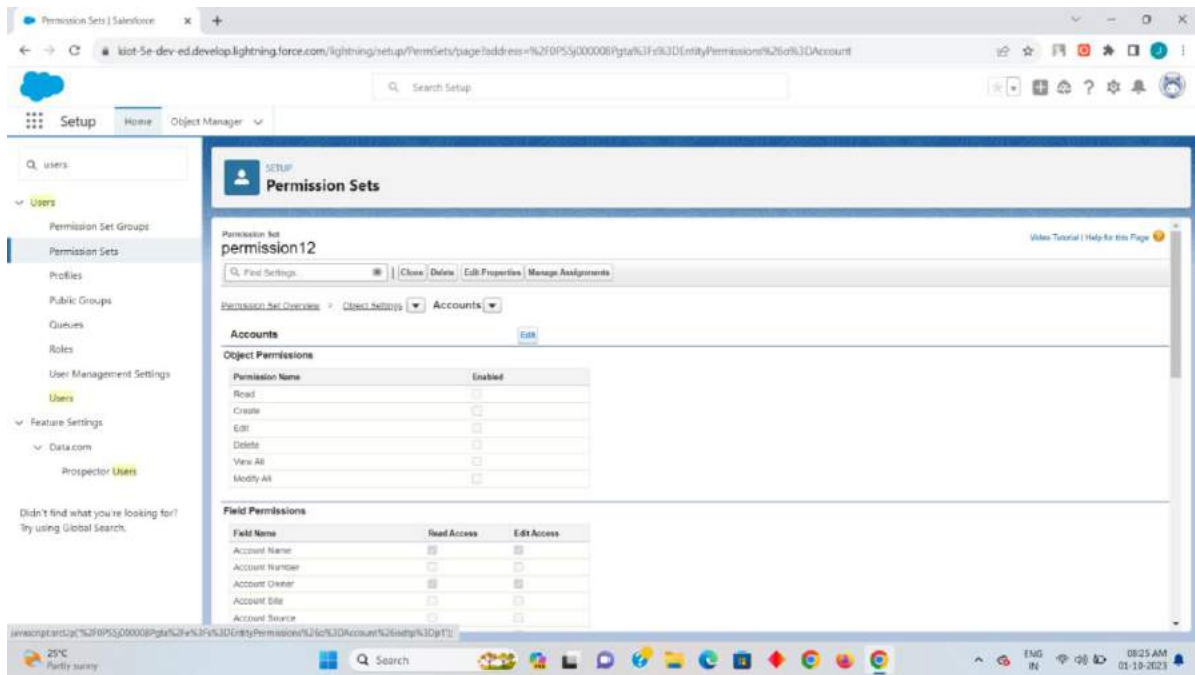
License

Save Cancel

29°C Partly sunny

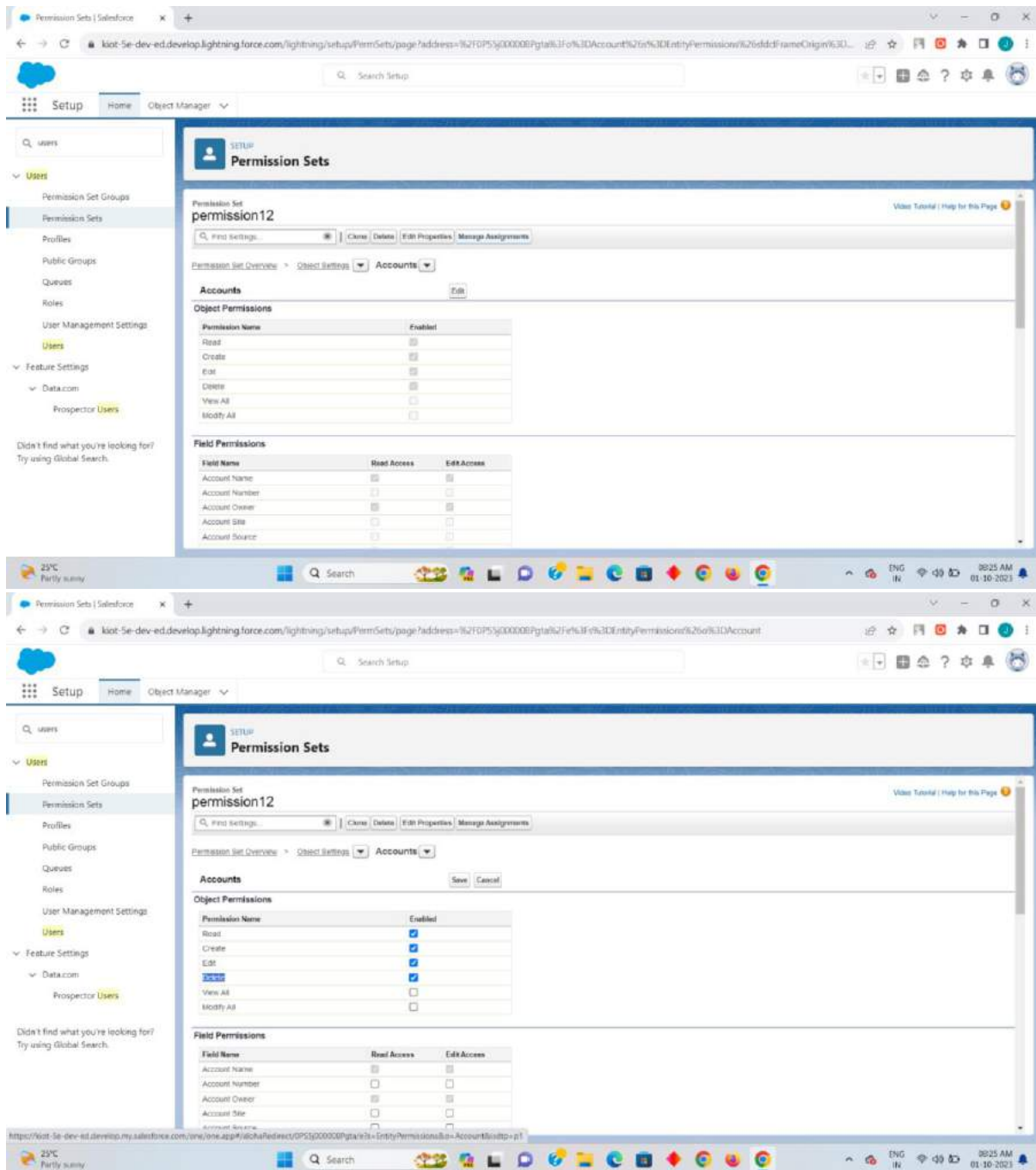
ENG IN

08:24 AM 01-10-2023



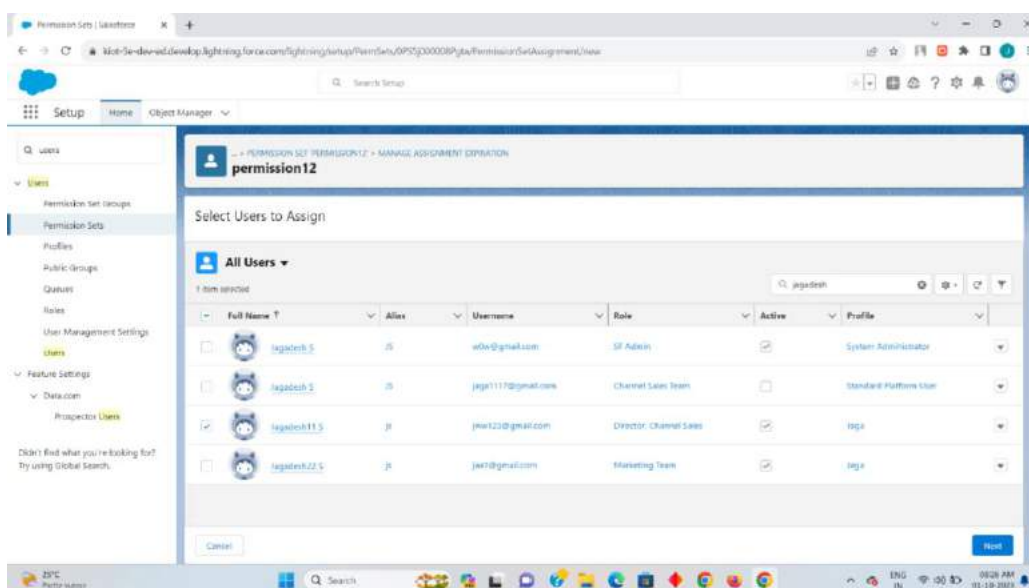
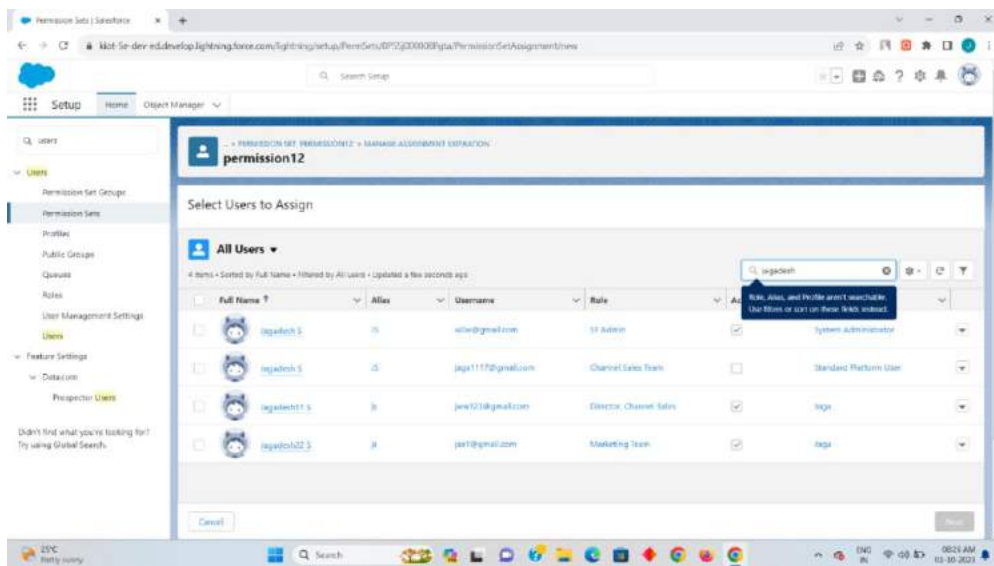
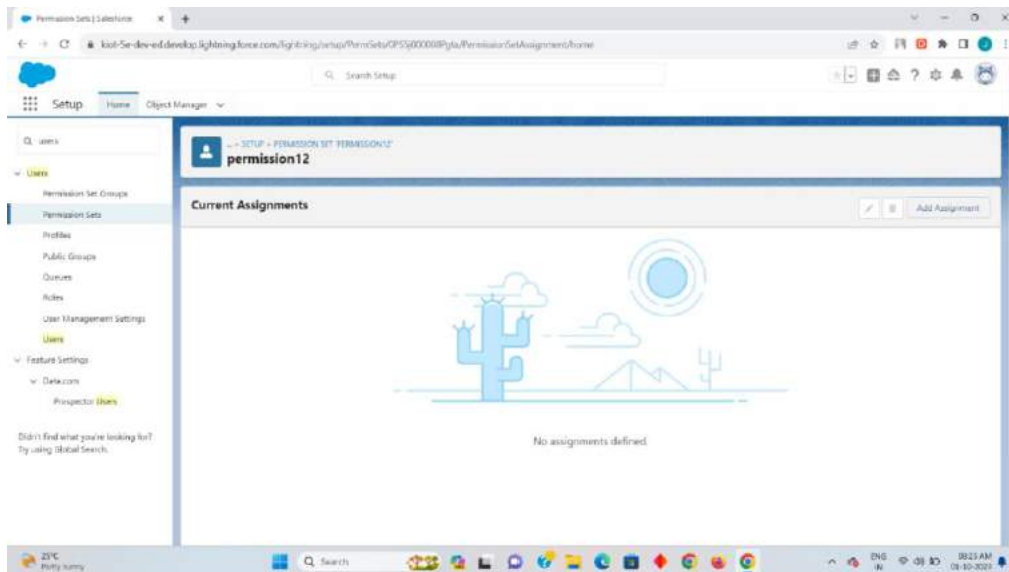
Step 7:

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.

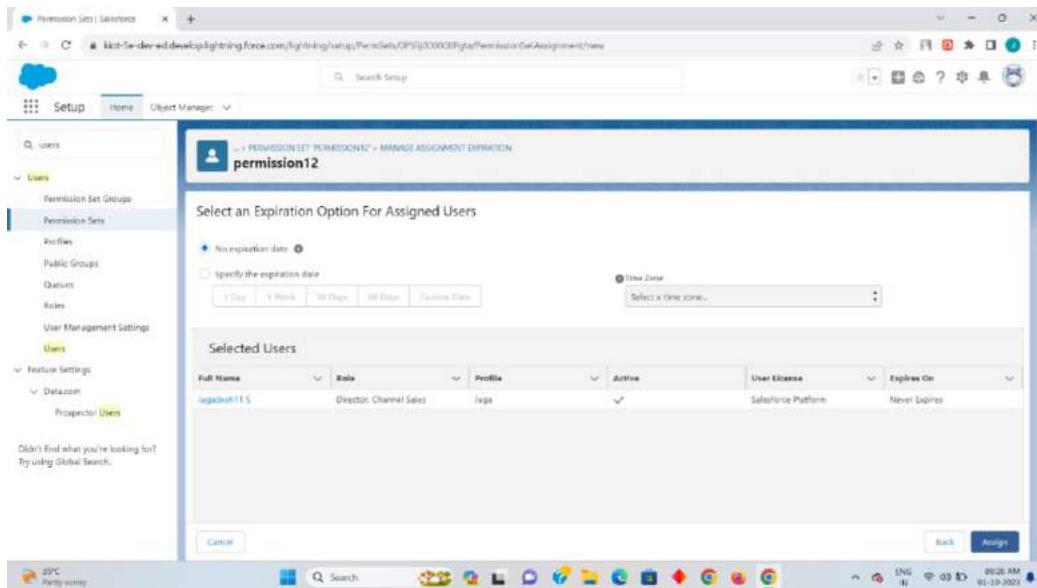


Step 8

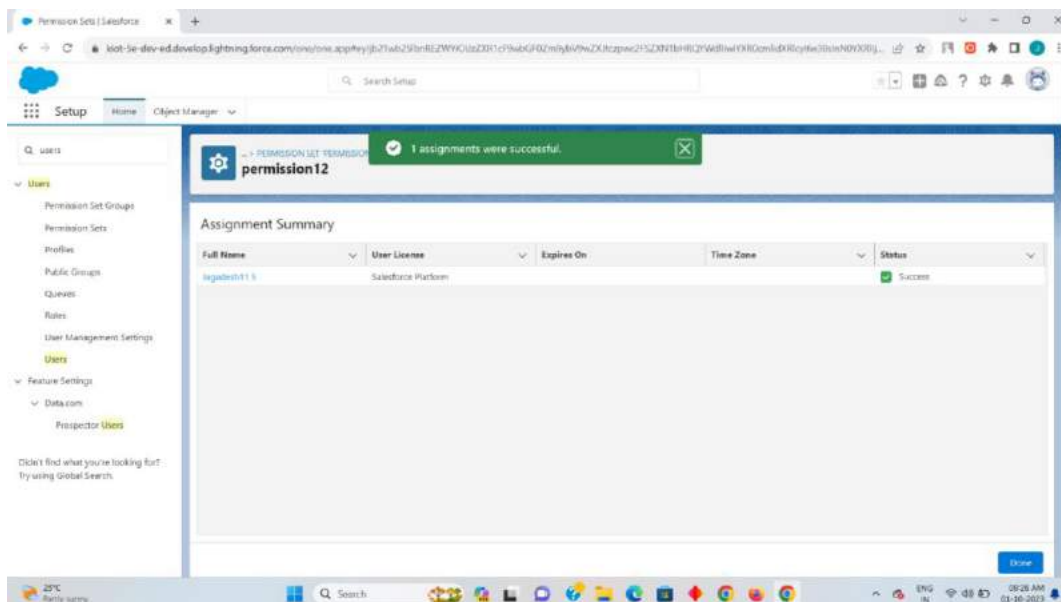
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



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


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

Solution:

Step 1: Create a Custom Object

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

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

<div>  <div> <div>SETUP > OBJECT MANAGER</div> <div>Survey Result</div> </div> </div>					
<div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>Search Layouts for Salesforce Classic</div> <div>Triggers</div> <div>Validation Rules</div>	Fields & Relationships	<div> <input type="text" value="Quick Find"/> </div> <div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div>	8 Items, Sorted by		
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	Comment	Comment__c	Text Area(255)		
	Created By	CreatedById	Lookup(User)		
	Email	Email__c	Email		
	Last Modified By	LastModifiedById	Lookup(User)		
	Name	Name__c	Text(51)		
	Owner	OwnerId	Lookup(User,Group)		✓
	Rating	Rating__c	Picklist		
	Survey Result Name	Name	Auto Number		✓

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

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

Email Template

Thank You Email - Survey

[Edit in Builder](#)
[Edit](#)
[Clone](#)

Details
Related

Information

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

Message Content

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

Additional Information

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

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**.

The screenshot shows the 'Edit Email Alert' interface for 'Survey - Thank You Email'. The page includes a header with 'Edit Email Alert' and 'Survey - Thank You Email', and a 'Help for this Page' link. Below the header is a description: 'Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.' The main form is titled 'Email Alert Edit' and contains several sections: 'Edit Email Alert' with fields for Description, Unique Name, Object, Email Template, Protected Component, and Recipient Type; 'Recipients' with 'Available Recipients' and 'Selected Recipients' lists; 'Additional Emails' with a text area; and 'From Email Address' with a dropdown and a checkbox. The 'Recipients' section shows 'User' as the selected type, with a search bar and a 'Find' button. The 'Available Recipients' list includes 'User: Integration User', 'User: Rakesh Gupta', and 'User: Security User'. The 'Selected Recipients' list shows 'Email Field: Email'. The 'From Email Address' dropdown is set to 'Current User's email address'.

Edit Email Alert Save Save & New Cancel

Edit Email Alert ! = Required Information

Description Survey - Thank You Email

Unique Name Survey_Thank_You_Email i

Object Survey Result

Email Template Thank You Email - Survey 🔍

Protected Component ☐

Recipient Type Search: User ! for: Find

Recipients

Available Recipients

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

Selected Recipients

Email Field: Email

Add
Remove

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

Additional Emails

From Email Address Current User's email address !

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

Save Save & New Cancel

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

1. Click **Setup**.

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

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

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

2.Value: {!Comment}

2.Click Add Row

3.Row 2:

1.Field: Email__c

2.Value: {!Email.value}

4.Click Add Row

5.Row 3:

1.Field: Name__c

**2.Value: {!Name.firstName}
 {!Name.lastName}**

6.Click Add Row

7.Row 3:

1.Field: Rating__c

2.Value: {!Rating}

7.Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

* Label
Save Response

* API Name
Save_Response

Description

How Many Records to Create

☒ One
☐ Multiple

How to Set the Record Fields

☐ Use all values from a record
☒ Use separate resources, and literal values

Create a Record of This Object

* Object
Survey Result

Set Field Values for the Survey Result

Field
Comment__c

←
Value
Comment

Field
Email__c

←
Value
Email > Value

Field
Name__c

←
Value
(!Name.firstName) (!Name.lastName)

Field
Rating__c

←
Value
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.

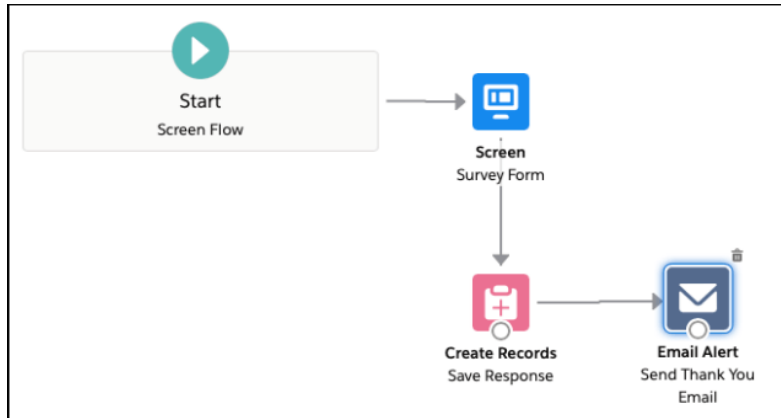
1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.

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

5. Click **Done**.

The screenshot shows a configuration window titled "Edit 'Survey - Thank You Email' email alert". It includes a header with instructions: "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." Below this, there are two input fields: "Label" with the value "Send Thank You Email" and "API Name" with the value "Send_Thank_You_Email". A "Description" field is also present. Under the "Set Input Values" section, there is a field for "Record ID" with the value "{!Save_Response}". At the bottom right, there are "Cancel" and "Done" buttons.

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



1. Click **Save**.

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

3. Click **Show Advanced**.

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

5. Type: Screen Flow

6. API Version for Running the Flow: 51

**7. Interview Label: Survey
{!\$Flow.CurrentDateTime}**

8. Click Save.

Save as

A New Version

A New Flow

* Flow Label

Survey

* Flow API Name

Survey

Description

Hide Advanced

How to Run the Flow ⓘ

User or System Context—Depends on How Flow is Launched

* Type

Screen Flow

* API Version for Running the Flow

51

Interview Label ⓘ

Insert a resource...

Survey {!\$Flow.CurrentDateTime}

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

2

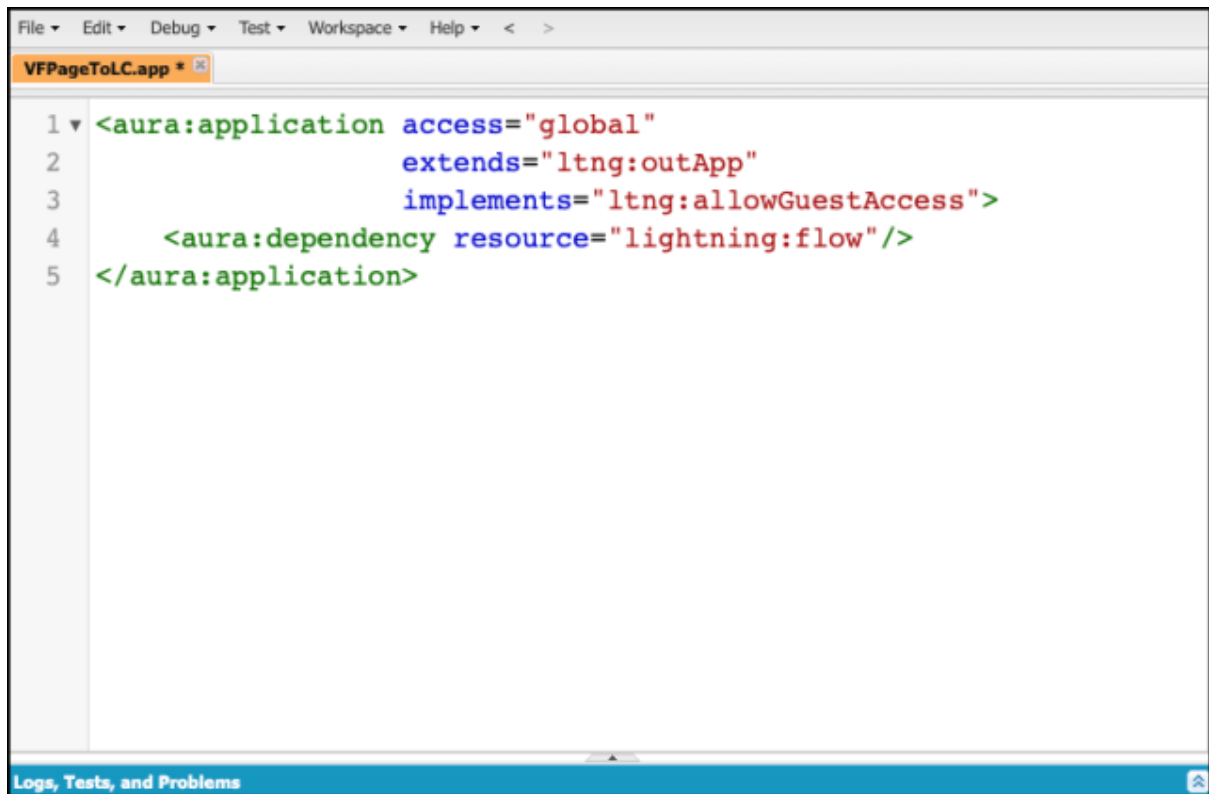
Cancel

Save

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

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

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



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

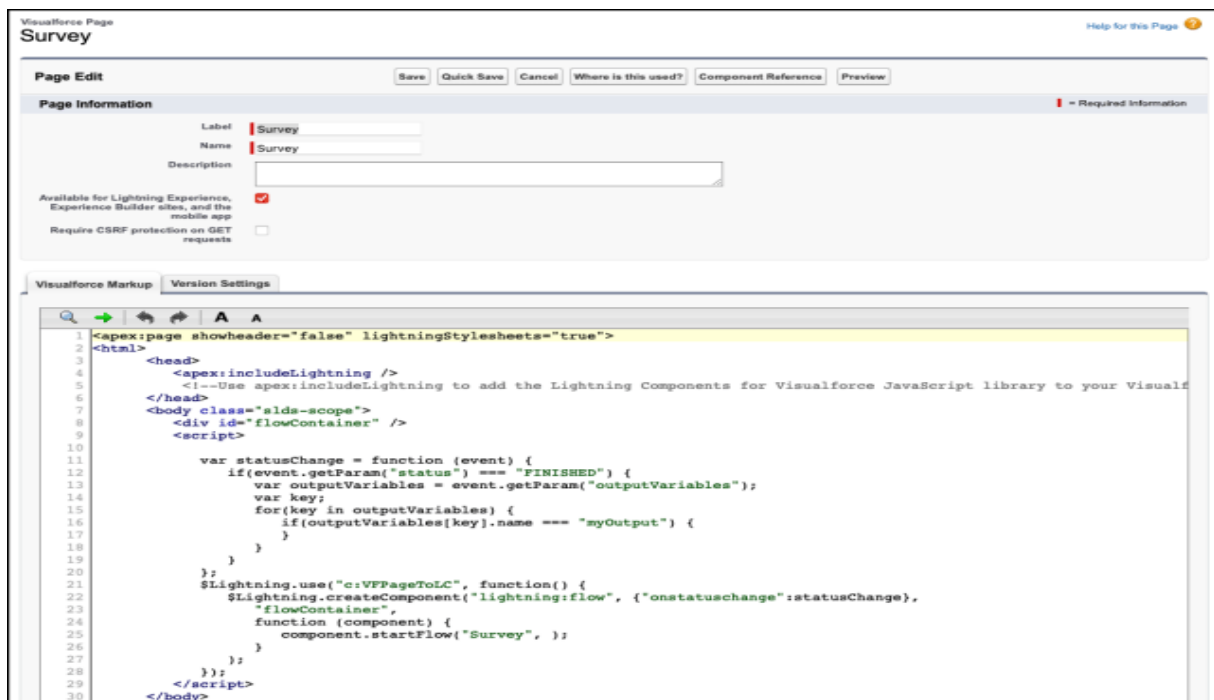
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

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

component on the page
using **\$Lightning.createComponent()**

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



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

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

1. Click **Setup**.

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

Site Edit [Save] [Cancel]

Site Label: Survey [i]

Site Name: Survey [i]

Site Description: [Text Area]

Site Contact: Rakesh Gupta [i]

Default Record Owner: Rakesh Gupta [i]

Default Web Address: http://katihar-developer-edition.gus.force.com/ survey [i]

Active: ☒ [i]

Active Site Home Page: Survey [Preview] [i]

Inactive Site Home Page: InMaintenance [Preview] [i]

Site Template: SiteTemplate [i]

Site Robots.txt: [Text Field] [i]

Site Favorite Icon: [Text Field] [i]

Analytics Tracking Code: [Text Field] [i]

URL Rewriter Class: [Text Field] [i]

Enable Feeds: ☐

Clickjack Protection Level: Allow framing by the same origin only (Recommended) [i]

Require Secure Connections (HTTPS): ☒ [i]

Lightning Features for Guest Users: ☒ [i]

Upgrade all requests to HTTPS: ☒ [i]

Enable Content Sniffing Protection: ☒ [i]

Enable Browser Cross Site Scripting Protection: ☒ [i]

Referrer URL Protection: ☒ [i]

Guest Access to the Payments API: ☐ [i]

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

Proof of Concept

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

Survey

Name

First Name

Alok

Last Name

Sinfal

* Email

* Rating

5

* Comment

Awesome Blog

Next

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

Thank You For Completing Our Survey!

Survey Site Guest User

via

bj9amq6fe7r1b-cdzwmaa.gs0.bnc.salesforce.com

8:09 PM (1 minute ago)

to me

Hi Alok Sinfal,

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

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

Thanks,
Automation Champion

Reply

Forward