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Salesforce

Developer(Course)

Assignment no 1

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

Solution:

Step 1: Create Custom Objects

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



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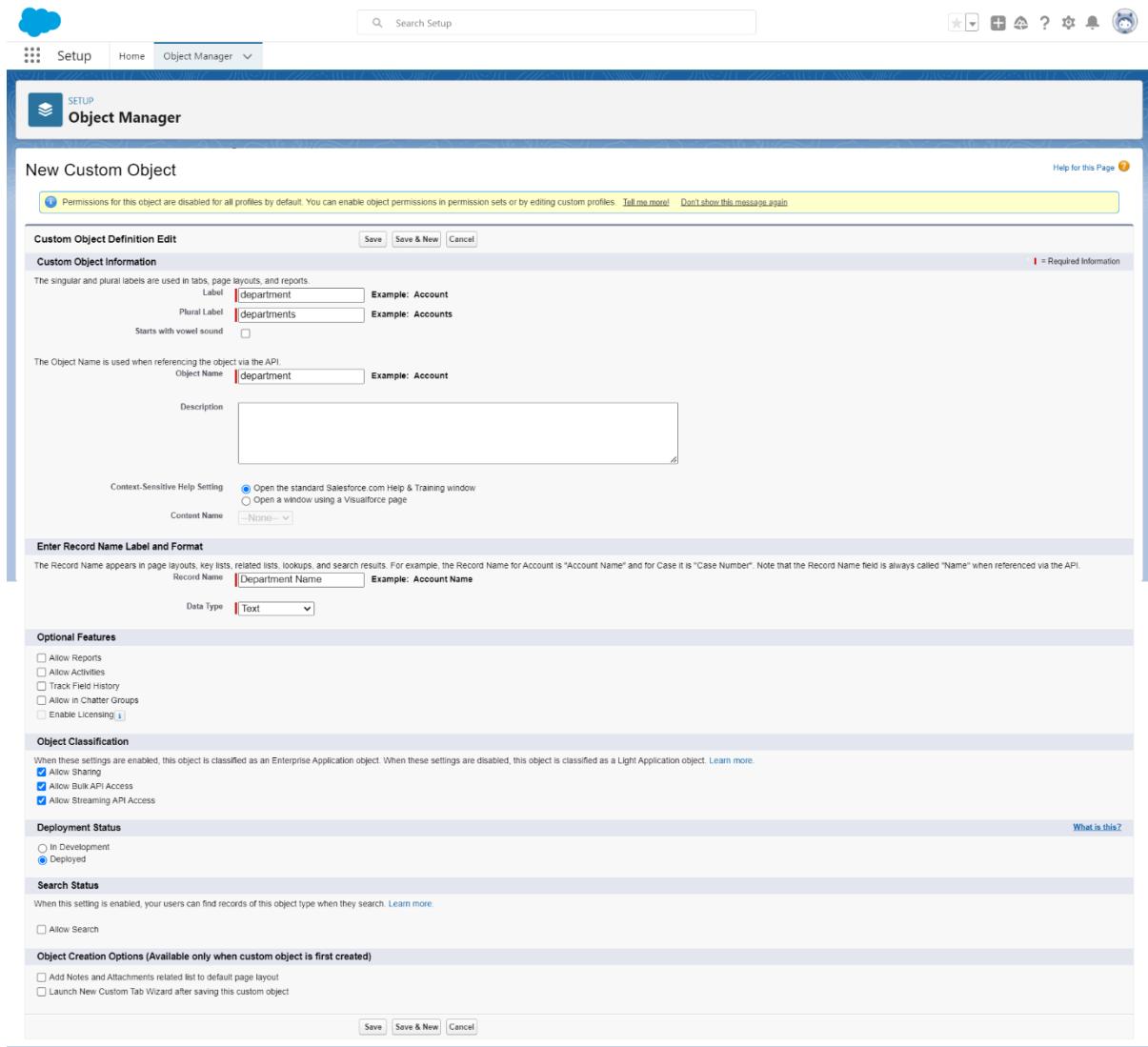
The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** "Setup" > "Object Manager" > "New Custom Object".
- Title Bar:** "SETUP" and "New Custom Object".
- Page Title:** "New Custom Object".
- Message Bar:** A yellow bar at the top stating, "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." It includes links to "Tell me more!" and "Don't show this message again".
- Section Headers:**
 - Custom Object Definition Edit**
 - Custom Object Information**
 - Enter Record Name Label and Format**
 - Optional Features**
 - Object Classification**
 - Deployment Status**
 - Search Status**
 - Object Creation Options (Available only when custom object is first created)**
- Form Fields:**
 - Custom Object Information:** "Label" (text input: college), "Plural Label" (text input: colleges), "Example" (text input: Account), "Starts with vowel sound" (checkbox).
 - Object Name:** "Object Name" (text input: college), "Example" (text input: Account).
 - Description:** A large text area.
 - Context-Sensitive Help Setting:** Radio buttons for "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page".
 - Content Name:** A dropdown menu showing "None".
 - Record Name:** "Record Name" (text input: College Name), "Example" (text input: Account Name).
 - Data Type:** A dropdown menu showing "Text".
 - Optional Features:** Checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", "Enable Licensing", and "Allow Sharing" (which is checked).
 - Object Classification:** Checkboxes for "Allow Bulk API Access" and "Allow Streaming API Access" (both are checked).
 - Deployment Status:** Radio buttons for "In Development" and "Deployed" (Deployed is selected).
 - Search Status:** A checkbox for "Allow Search".
 - Object Creation Options:** Checkboxes for "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".
- Buttons:** "Save", "Save & New", and "Cancel".

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



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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



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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.



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

Object Manager: CDepartment

Details tab selected.

Fields & Relationships section:

- Description
- API Name: CDepartment__c
- Custom: ✓
- Singular Label: CDepartment
- Plural Label: CDepartments

Enable Reports, **Track Activities**, **Track Field History**, **Deployment Status** (Deployed), **Help Settings**, and **Standard salesforce.com Help Window** are listed.

Edit and **Delete** buttons are at the top right.

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

Object Manager: CDepartment

Fields & Relationships tab selected.

New Relationship process, Step 3 of 6.

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

Field Label: college

Field Name: college

Description: (empty)

Help Text: (empty)

Child Relationship Name: CDepartments

Sharing Setting:

- 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

Previous, **Next**, and **Cancel** buttons are at the bottom right.



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The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'CDepartment New Relationship' and 'Step 2. Choose the related object'. A dropdown menu shows 'Related To college'. Navigation buttons at the bottom include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various object settings. The main area is titled 'CDepartment New Custom Field' and 'Step 1. Choose the field type'. Under 'Data Type', the 'Roll Up Summary' option is selected. A detailed description of the field type is provided, mentioning it creates a relationship that links the object to another object. The 'Master-Detail Relationship' option is also visible. Navigation buttons at the bottom include 'Next' and 'Cancel'.

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."



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- 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.**



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SETUP > OBJECT MANAGER
CDepartment

Fields & Relationships
4 Items, Sorted by Field Label

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

SETUP
Tabs

Custom Tabs

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

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

Help for this Page [?](#)

Custom Object Tabs

Action	Label	New	What Is This?	Description
Edit Del	Book1	Box		
Edit Del	Research Proposal	Square		
Edit Del	student	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.



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Setup > OBJECT MANAGER

college

Details

Fields & Relationships

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

New Custom Field

Step 5. Add to page layouts

Step 5 of 5

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

Setup > OBJECT MANAGER

college

Details

Fields & Relationships

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

New Custom Field

Step 4. Establish field-level security

Step 4 of 5

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

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

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

Previous Next Cancel



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The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being modified is 'college'. The left sidebar shows various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'New Custom Field' and is on 'Step 3 of 5'. The section is 'Step 3. Define the summary calculation'. It includes fields for 'Master Object' (college) and 'Summarized Object' (CDepartments). Under 'Select Roll-Up Type', 'COUNT' is selected. A 'Field to Aggregate' dropdown is set to 'None'. The 'Filter Criteria' section has two options: 'All records should be included in the calculation' (selected) and 'Only records meeting certain criteria should be included in the calculation'. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being modified is 'college'. The left sidebar shows various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'New Custom Field' and is on 'Step 2 of 5'. The section is 'Step 2. Enter the details'. It includes fields for 'Field Label' (Total count), 'Field Name' (Total_count), 'Description' (a large text area), and 'Help Text' (another large text area). There is an option 'Auto add to custom report type' with a checked checkbox. Below the form are navigation buttons: 'Previous', 'Next', and 'Cancel'.



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New Custom Field

Step 1. Choose the field type

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

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Roll-Up Summary 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.
- Lookup Relationship A relationship 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.
- 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 detail records are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Boolean Allows users to select a True (checked) or False (unchecked) value.

Fields & Relationships				
4 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓

Step 4: Create a Lightning App

1. Type and select "App Manager."
2. Click "New Lightning App."
3. Fill in basic information (Name,



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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.**



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The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The left sidebar has a search bar and navigation links for 'User Interface' and 'Rename Tabs and Labels'. The main content area is titled 'New Custom Object Tab' and 'Step 2: Add to Profiles'. It asks to choose user profiles for the new tab. A radio button is selected for 'Apply one tab visibility to all profiles [Default On]'. Below is a table mapping profiles to tab visibility settings.

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 - Free 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

Buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.



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The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. The main title is 'New Custom Object Tab'. The sub-section is 'Step 1. Enter the Details'. It asks to choose a custom object for the tab. An 'Object' dropdown is set to 'college', and a 'Tab Style' dropdown is set to 'Jewel'. Below this, there's a note about choosing a splash page and a 'Description' input field. At the bottom right are 'Next' and 'Cancel' buttons.

The screenshot shows the 'Tabs' configuration page continuing to 'Step 3. Add to Custom Apps'. It lists various custom apps and their visibility status. A checkbox 'Include Tab' is checked for all listed items. At the bottom right are 'Previous', 'Save', and 'Cancel' buttons.



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New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

Select an existing custom object or [create a new custom object now](#).

Object	CDepartment
Tab Style	Lightning

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

Splash Page Custom Link	-None-
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Enter a short description

Description

Next Cancel

Lightning Experience App Manager

20 Items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified Date	App ...	Visi... ▾
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	14/07/2023, 10:47 am	Classic	✓
2 Analytics Studio	Insights	Discover and manage business solutions designed for your industry.	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	✓



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The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'User Interface' and 'Rename Tabs and Labels'. A message at the top says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' and contains a table for 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. It lists tabs like Book1, Departments, colleges, Research_Proposal, and student with styles Box, Lightning, Jewel, Square, and Box respectively. Below this are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each stating 'No [tab type] have been defined'.

Action	Label	Tab Style	Description
Edit Del	Book1	Box	
Edit Del	Departments	Lightning	
Edit Del	colleges	Jewel	
Edit Del	Research_Proposal	Square	
Edit Del	student	Box	



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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.



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MECW

My college colleges CDepartments student Content

Search...

New Contact Edit New Opportunity

Related Details

college Name
mecw

Total count
2

phone
9087116402

Email
kiot@gmail.com

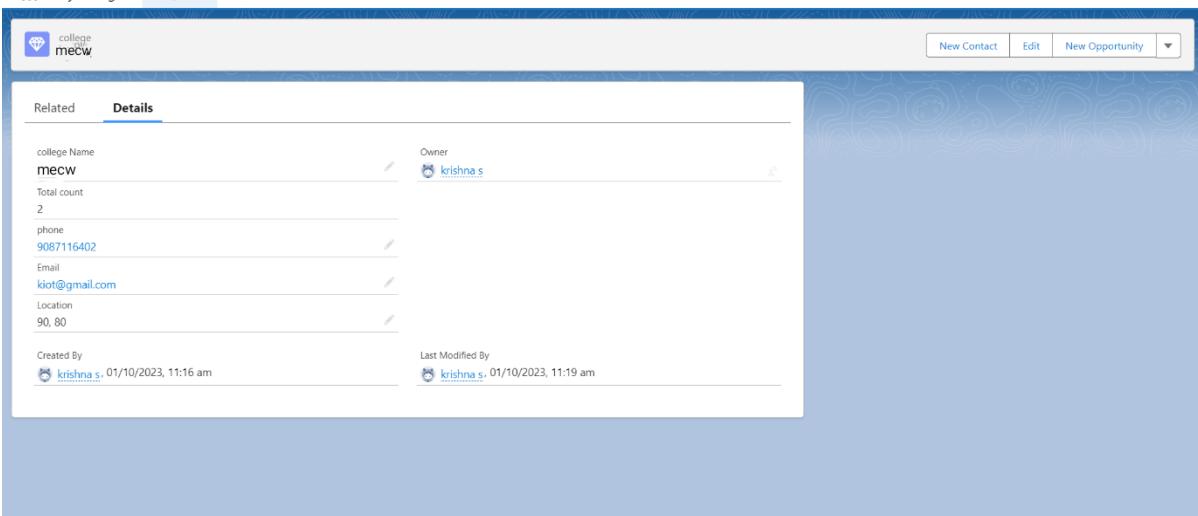
Location
90, 80

Owner
 krishna.s.

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

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

History

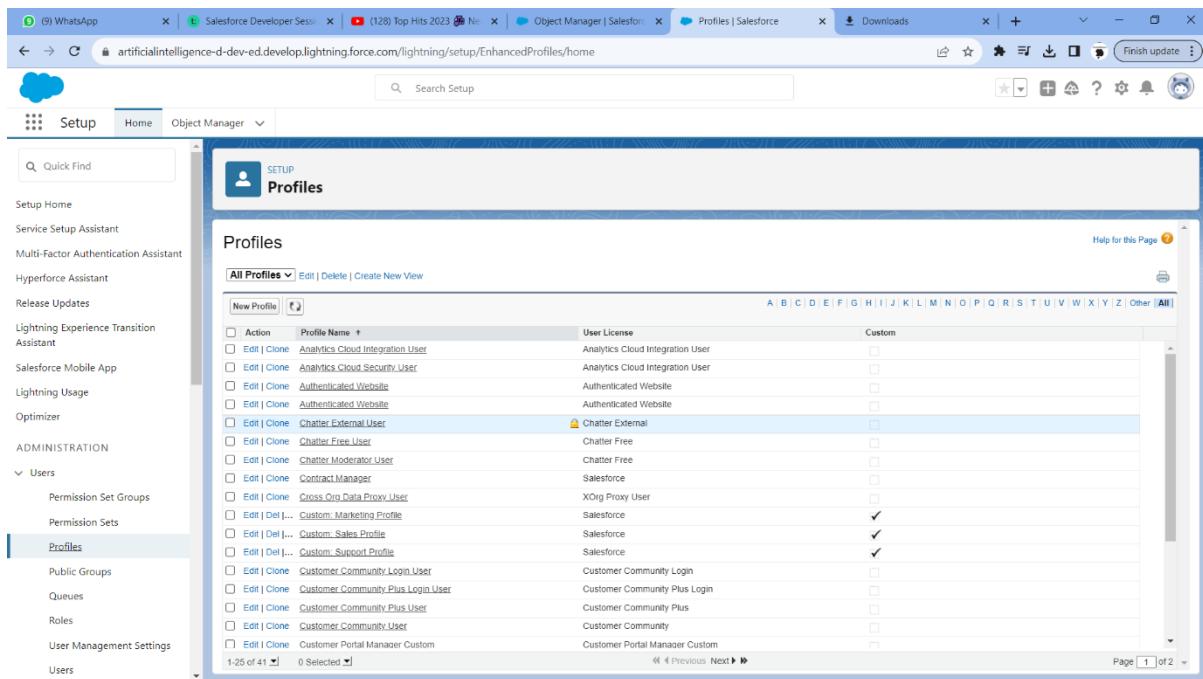


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2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main area displays a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains several checked checkboxes, indicating specific profile settings. The table is paginated at the bottom, showing page 1 of 2.

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



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The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users). The main content area displays a table titled "Profiles" with columns for Action, Profile Name, User License, and Custom. The table lists several profiles: "Salesforce API Only System Integrations" (User License: Salesforce Integration), "salesmanager" (User License: Salesforce, checked), "Silver Partner User" (User License: Silver Partner), "Solution Manager" (User License: Salesforce), "Standard Platform User" (User License: Salesforce Platform), "Standard User" (User License: Salesforce), and "System Administrator" (User License: Salesforce). A navigation bar at the bottom indicates 1-7 of 7 profiles.

The screenshot shows the "Clone Profile" dialog box. The left sidebar is identical to the previous screenshot. The main content area has a heading "Clone Profile" and a sub-instruction "Enter the name of the new profile." Below this, a message "You must select an existing profile to clone from." is displayed. A table shows the "Existing Profile" as "Standard Platform User", "User License" as "Salesforce Platform", and a "Profile Name" input field which is empty and highlighted with a red border. At the bottom of the dialog are "Save" and "Cancel" buttons.



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The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. Under Administration, the 'Users' section is expanded, and 'Profiles' is selected. The main content area is titled 'Clone Profile' and displays a message: 'You must select an existing profile to clone from.' It shows the 'Existing Profile' is set to 'Standard Platform User', 'User License' is 'Salesforce Platform', and 'Profile Name' is 'Manager'. There are 'Save' and 'Cancel' buttons at the bottom.

The screenshot shows the Salesforce Setup interface. The navigation sidebar is identical to the previous one. The main content area is titled 'Profile Manager' and displays a table of profiles. One profile is listed: 'Name: Manager, User License: Salesforce Platform, Description: Created By: SALESFORGE, Created Date: 01/10/2023, 7:09 pm, Modified By: SALESFORGE, Modified Date: 01/10/2023, 7:09 pm'. Below this table, there is a section titled 'Page Layouts' which lists various standard object layouts for objects like Global, Lead, Account, Opportunity, and Case.



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The screenshot shows the Salesforce Setup Manager - Profiles screen. On the left, the navigation sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users). The main content area is titled "Manager" and contains a "Profile Edit" form for the "Manager" profile. The form includes fields for Name (Manager), User License (Salesforce Platform), Description, and a "Custom Profile" checkbox. Below this are sections for "Custom App Settings" and "Service Provider Access". In "Custom App Settings", there are two rows of checkboxes for Analytics Studio, App Launcher, and kiot. In "Service Provider Access", there are tabs for Standard Tab Settings (Home, Accounts, Alert Settings) and Learning, Libraries, Lightning Bolt Solutions.

The screenshot shows the Salesforce Setup Manager - Profiles screen. The left sidebar is identical to the previous screenshot. The main content area is titled "Profiles" and contains several configuration sections: "Communication Subscription Channel Types", "Custom Object Permissions", "Session Settings", and "Password Policies". The "Communication Subscription Channel Types" section lists various types like Individuals, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, and User External Credentials, each with a grid of checkboxes. The "Custom Object Permissions" section shows permissions for Bank and customers objects across Basic Access (Read, Create, Edit, Delete) and Data Administration (View All, Modify All) levels. The "Session Settings" section includes "Session Times Out After" (set to 2 hours of inactivity) and "Session Security Level Required at Login" (set to None). The "Password Policies" section includes "User passwords expire in" (90 days), "Enforce password history" (3 passwords remembered), and "Minimum password length" (8).



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The screenshot shows the Salesforce Setup interface under the Profiles section. On the left sidebar, under Administration > Users, the Profiles option is selected. The main content area displays the Profiles configuration screen. It includes sections for Contact Point Addresses, Contact Point Consents, Contact Point Emails, Sellers, Streaming Channels, and Base External Credentials. Below these are sections for Custom Object Permissions (Bank and customers) and Session Settings (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login: None). The Password Policies section is also visible.

This screenshot is nearly identical to the one above, showing the same Salesforce Profiles setup page. The left sidebar shows the Profiles option selected under Administration > Users. The main content area displays the Profiles configuration screen with sections for Contact Point Addresses, Contact Point Consents, Contact Point Emails, Sellers, Streaming Channels, and Base External Credentials. It also shows Custom Object Permissions for Bank and customers, Session Settings (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login: None), and the Password Policies section.



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Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

All Users

This page allows you to create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: [All Users](#) | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit Login	Antonia Dilya	dadan	test_dilya_pas_4e6b9b79wtk_tszrgqabkox_3q8cf0yzwms_h43tkzy6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LJMS User
Edit	Chatter Export	Chatter	chatty_00d5000000cskskeah_lo0hfemprjka@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Edit Login	Ellington Amelia	aelli	amelia.ellington.1.46kxcp0odin0scyndcu4wh_hnbdlwmvyrho_wguctorlaly@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
Edit	S_GOPAL	GS	kot120@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@000500000bcaskeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@000500000bcaskeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User



Edit with WPS Office

New User

User Edit Save | Save & New | Cancel

General Information

First Name	<None Specified>
Last Name	<None Specified>
Alias	<None Specified>
Email	<None Specified>
Username	<None Specified>
Nickname	<None Specified>
Title	<None Specified>
Company	<None Specified>
Department	<None Specified>
Division	<None Specified>

Role: <None Specified>
User License: Salesforce Integration
Profile: Salesforce API Only System Integrations
Active:

Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:

Data.com User Type: <None>
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:
Load Lightning Pages While Scrolling:
Debug Mode:

New User

User Edit Save | Save & New | Cancel

General Information

First Name	sowmya
Last Name	bala
Alias	sbala
Email	2k20cse179@kiot.ac.in
Username	2k21it@kiot.ac.in
Nickname	User169616771282564526
Title	worker
Company	kiot bank
Department	<None Specified>
Division	<None Specified>

Role: <None Specified>
User License: Salesforce Platform
Profile: Manager
Active:

Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:

Data.com User Type: <None>
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:
Load Lightning Pages While Scrolling:
Debug Mode:



Edit with WPS Office

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with various links like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, etc. The main area is titled "Users" and shows a user detail page for "Sowmya bala". The "User Detail" section contains fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password Authenticator, and App Registration: Salesforce Authenticator. The "Role" section lists several options like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, and Salesforce CRM Content User. The "User License" section shows "Profile Manager" with "Active" checked. There are also tabs for Edit, Sharing, Reset Password, Login, and Freeze.

The screenshot shows a Gmail inbox. The left sidebar includes Mail, Chat, Spaces, Meet, and Labels. The inbox list shows an email from "support@salesforce.com" with the subject "Welcome to Salesforce!". The email body contains a "Welcome to Salesforce!" message, a "Verify Account" button, a URL (<https://artificialintelligence-d-dev-ed.my.salesforce.com>), and a note about saving the URL for later log-in. At the bottom, there's a copyright notice: "© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners."



Edit with WPS Office

(9) WhatsApp x | (1) Salesforce Dev x | (128) Top Hits x | Object Manager x | Users | Sales x | Downloads x | Welcome to x | Recently Viewed x | Change Your x + - □ ×

Finish update



Change Your Password

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

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
salem

Change Password

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

Login | Salesforce x +

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

Incognito Finish update



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

WATCH ON DEMAND

AIDay

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Edit with WPS Office

Recently Viewed | Bank | Salesfo... +

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

MECW

mecw Bank customers Home

Bank Recently Viewed

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

Bank Name ↓

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

sowmiya bala
artificialintelligence-d-dev-ed.develop.my.salesforce.com
Settings Log Out

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic

Add Username

New Bank | Salesforce +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=16...

mecw Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

* = Required Information

Information

Bank Name: boi

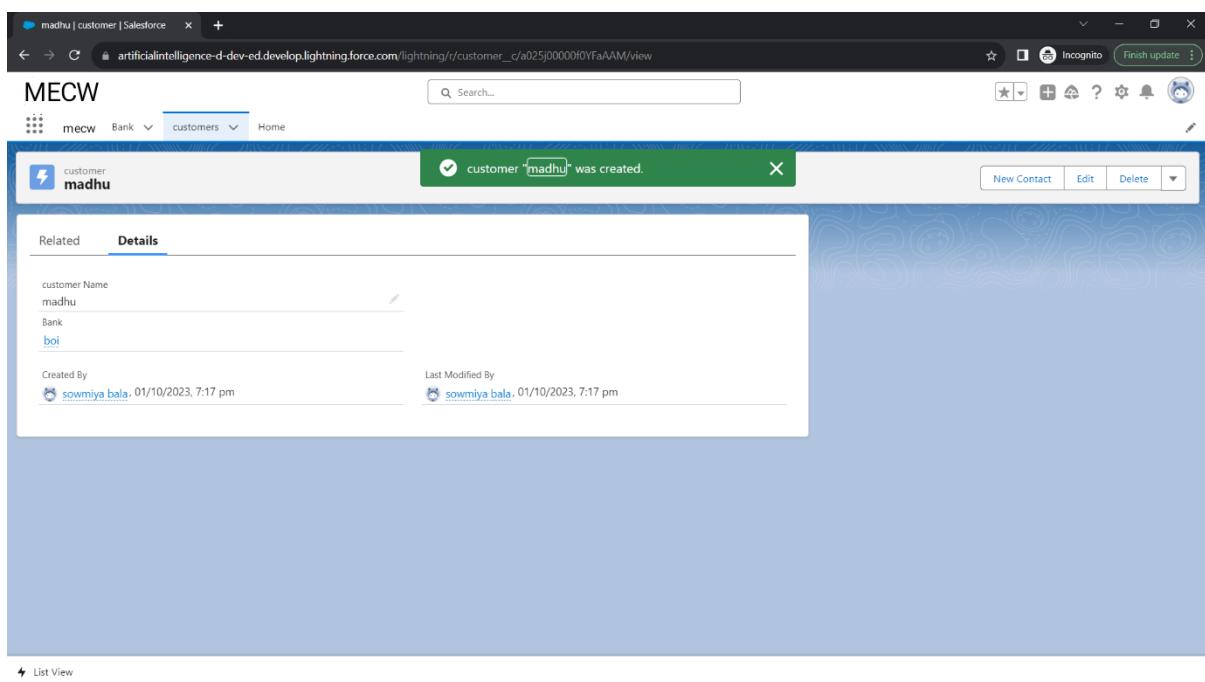
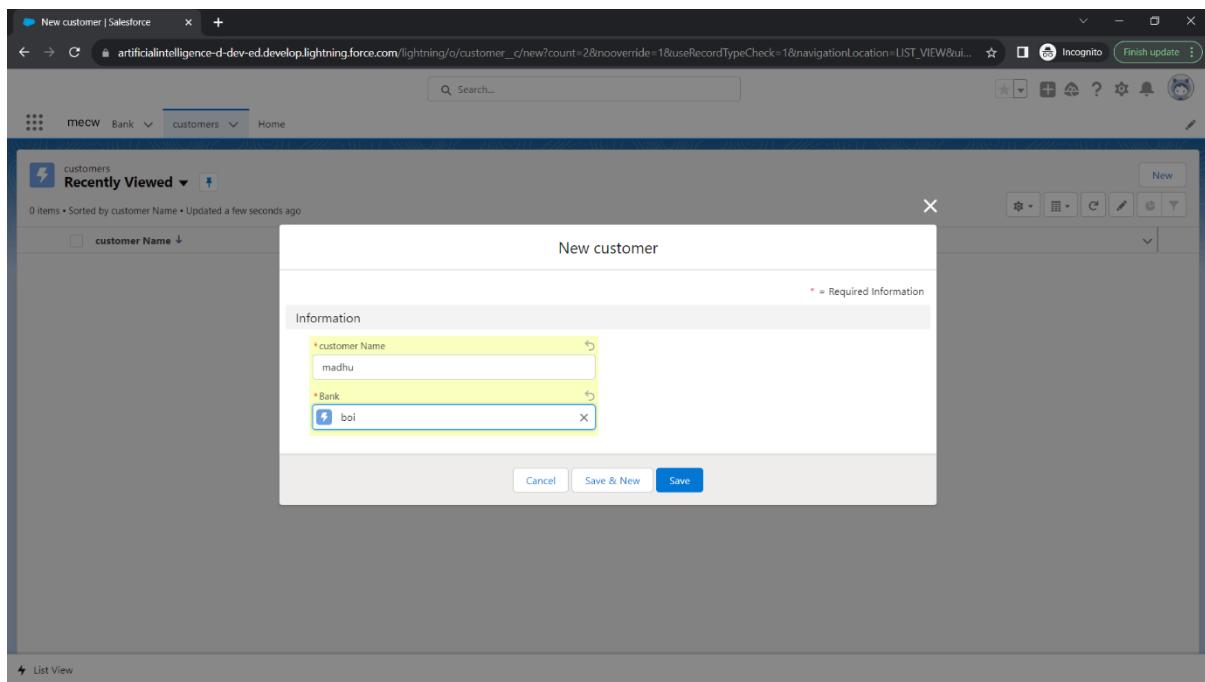
Owner: sowmiya bala

phoneno: 0897754534

Cancel Save & New Save



Edit with WPS Office



Edit with WPS Office

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings). The main content area displays a table titled "Profiles" with the following data:

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

Page navigation and search bars are at the bottom.

The screenshot shows the "Clone Profile" page. The left sidebar is identical to the previous screenshot. The main content area has a heading "Clone Profile" and a sub-instruction "Enter the name of the new profile." Below this, a message says "You must select an existing profile to clone from." A table shows the selection details:

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

At the bottom are "Save" and "Cancel" buttons.



Edit with WPS Office

The screenshot shows the Salesforce 'Profiles' page under the 'Setup' tab. The 'salesmanagement' profile is selected. The page includes sections for Profile Detail (Name: salesmanagement, User License: Salesforce Platform, Description: Created By: Suman S, Created Date: 01/10/2022, 7:19 pm, Modified By: Suman S, Modified Date: 01/10/2022, 7:19 pm), Page Layouts (Standard Object Layouts for Account, Contact, Lead, Opportunity, Product, Payment, and Asset), and a permissions section (Profile Permissions, Object Permissions, and Record Types). A sidebar on the left lists various setup categories like Service Desk Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, and Salesforce Mobile App.

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

- Header:** WhatsApp, Salesforce Developer Session 2, Top Hits 2023, Profiles | Salesforce, Welcome to Salesforce: Verify your...
- Page:** Profiles
- Profile Edit:** Profile Name: salesmanage, User License: Salesforce Platform, Description: (empty), Custom Profile checked.
- Custom App Settings:** Analytics Studio (standard_Insights) - Visible (unchecked), Default (radio button selected). Platform (standard_Platform) - Visible (checked), Default (radio button selected).
- Service Provider Access:** App Launcher (standard_AppLauncher) - Visible (unchecked), Default (radio button selected). WDC (standard_Work) - Visible (unchecked), Default (radio button selected).
- Tab Settings:** Overwrite users' personal tab customizations (checkbox unchecked).
- Standard Tab Settings:** Home (radio button selected), Default On (radio button selected). Accounts (radio button selected), Learning (radio button selected), Default On (radio button selected).

Custom Object Permissions

Object	Bank	customers	Enhancement Requests
Basic Access	Read, Create, Edit, Delete	View All, Modify All	Read, Create, Edit, Delete
Data Administration	View All, Modify All	Read, Create, Edit, Delete	View All, Modify All

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Custom Object Permissions

Object	Bank	customers	Enhancement Requests
Basic Access	Read, Create, Edit, Delete	View All, Modify All	Read, Create, Edit, Delete
Data Administration	View All, Modify All	Read, Create, Edit, Delete	View All, Modify All

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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



Edit with WPS Office

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. A modal window titled 'New User' is open, showing the 'User Edit' form. The 'General Information' tab is active. The user details entered are:

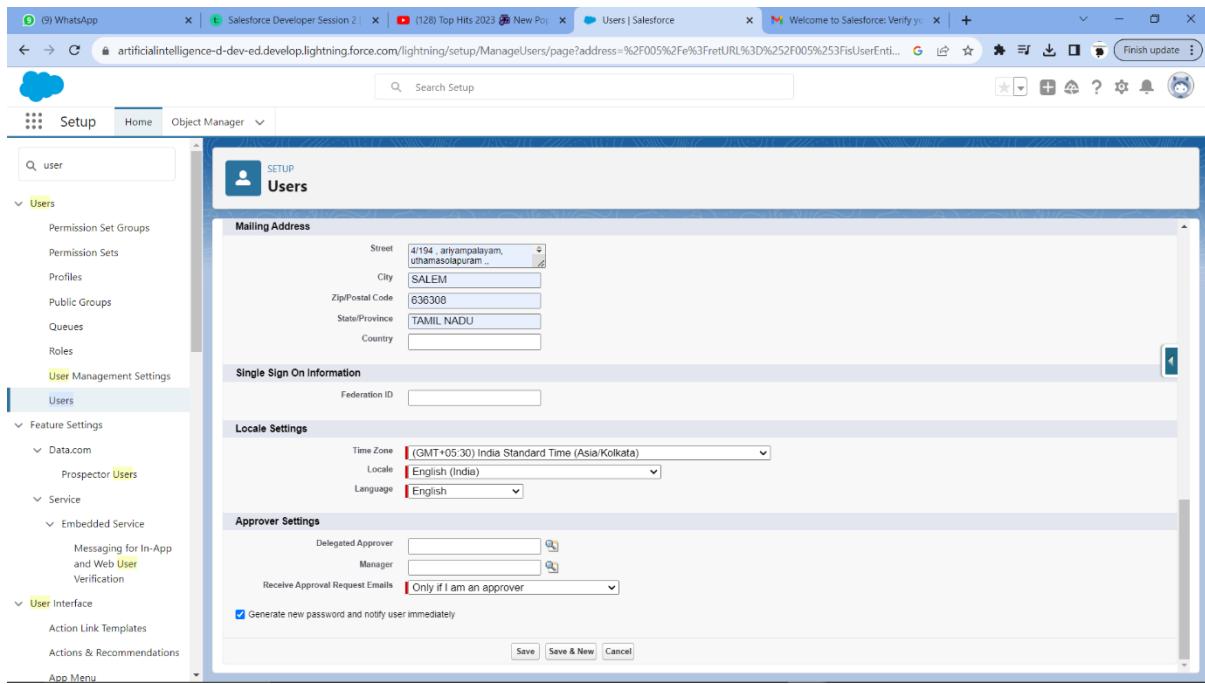
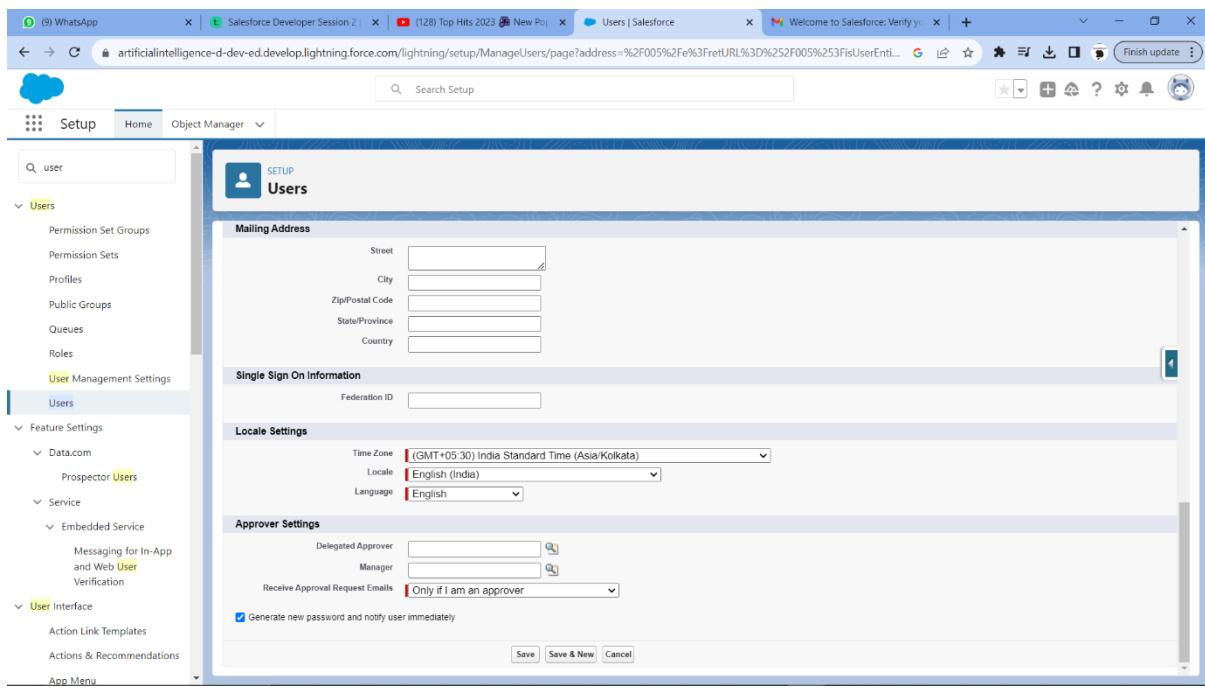
Field	Value
First Name	madhu
Last Name	b
Alias	mb
Email	2k20cse179@kiot.ac.in
Username	2k20cse179@kiot.ac.in
Nickname	User169616842428654192
Title	worker
Company	kiot bank
Department	Sales
Division	

The 'Role' dropdown is set to '<None Specified>'. The 'User License' dropdown is set to 'Salesforce Integration'. The 'Profile' dropdown is set to 'Salesforce API Only System Integrations'. The 'Active' checkbox is checked. Other checkboxes for various user types like Marketing User, Offline User, etc., are unchecked. The 'Data.com User Type' dropdown is set to '-None-'.

This screenshot is identical to the one above, except the 'Profile' dropdown in the 'User Edit' form is now set to 'salesmanage' instead of 'Salesforce API Only System Integrations'.



Edit with WPS Office



Edit with WPS Office

The screenshot shows the Salesforce Setup interface. On the left, a sidebar navigation menu includes sections like Permission Set Groups, Profiles, Public Groups, Roles, User Management Settings (which is currently selected), and various Service and User Interface options. The main content area displays the 'User Detail' for a user named 'madhu b'. The user's details include:

- Name: madhu b
- Alias: mb
- Email: 2k20csit179@kiot.ac.in [Verify]
- Username: 2k20csit@kiot.ac.in
- Nickname: User16961684242855419206
- Title: worker
- Company: kiot bank
- Department: Sales
- Division: Address: UTSI, arayampalayam, utthamasapuram, , Paraiakkadu , salem- 636308
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English
- Delegated Approver:
- Manager:
- Receive Approval Request Emails: Only if I am an approver
- Federation ID:
- App Registration: One-Time Password Authenticator

The 'Role' section indicates the user is a 'Salesforce Platform Profile' with 'salesmanager' assigned. Other roles listed are Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, and Load Lightning Pages While Scrolling.

The screenshot shows a Gmail inbox. The left sidebar lists Mail, Chat, Spaces, and Meet. The inbox contains 5,318 messages. A prominent message from 'Welcome to Salesforce!' is displayed. The email content is as follows:

Welcome to Salesforce!

Click below to verify your account.

[Verify Account](#)

To easily log in later, save this URL:
<https://artificialintelligence-d-dev-ed-develop.my.salesforce.com>

Username:
2k20csit@kiot.ac.in

Again, welcome to Salesforce!

At the bottom of the email, there is a copyright notice: © Copyright 2000-2018 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.



Edit with WPS Office

Change Your Password | Salesforce

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

salesforce

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
india

Change Password

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

Recently Viewed | Bank | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank_c/list?filterName=Recent Incognito (3) Finish update

MECW

mecw Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

New

List View



Edit with WPS Office

Recently Viewed | customers | S | +

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

Incognito (3) Finish update

MECW

meow Bank customers Home

Search...

customers Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

(9) WhatsApp | (1) Salesforce Developer Session | (128) Top Hits 2023 | (1) Permission Sets | Salesforce | (1) Welcome to Salesforce: V | (1) Reset Password | Salesforce | +

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

Finish update

Setup

Home Object Manager

Search Setup

Permission Sets

Help for this Page

Permission Sets

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

In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | Edit | Delete | Create New View

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

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

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



Edit with WPS Office

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:



Edit with WPS Office

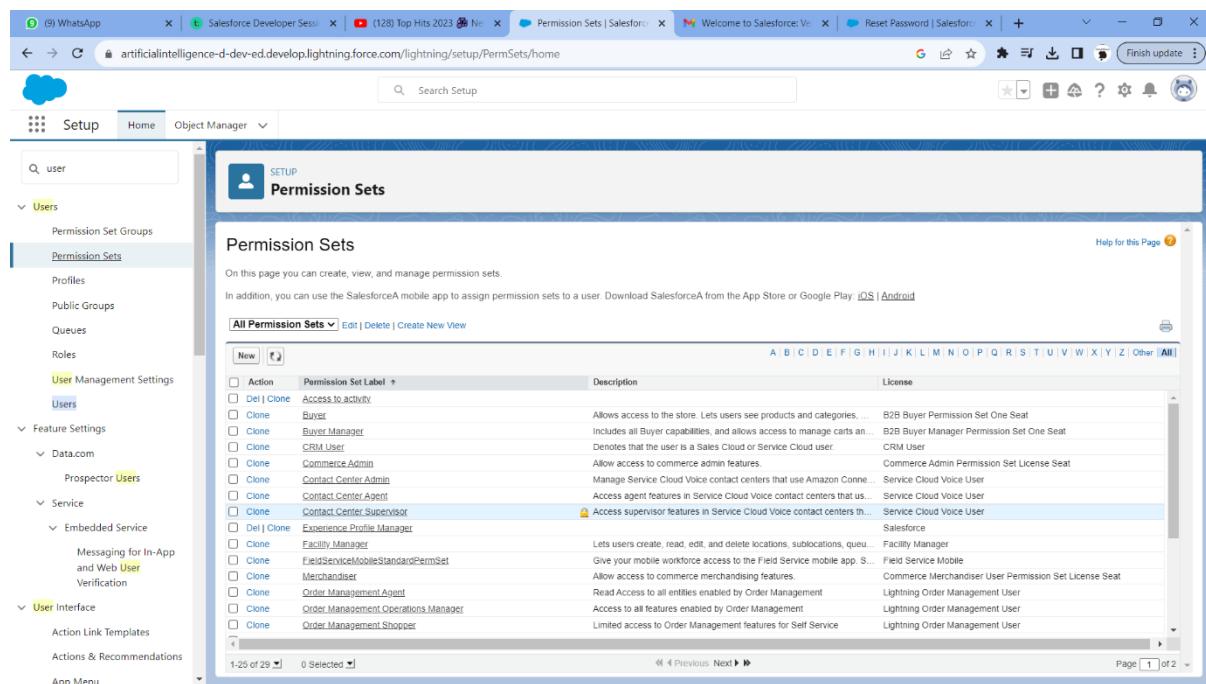
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

Organization-Wide Defaults:

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

Testing:

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



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

- Page Title:** Permission Sets
- Section:** Permission Sets
- Sub-section:** All Permission Sets
- Table Headers:** Action, Permission Set Label, Description, License
- Table Data:** A list of permission sets including:
 - Access_to_ACTIVITY
 - Buyer
 - Buyer_Manager
 - CRM_User
 - Commerce_Admin
 - Contact_Center_Admin
 - Contact_Center_Agent
 - Contact_Center_Supervisor
 - Experience_Profile_Manager
 - Facility_Manager
 - FieldServiceMobileStandardPermSet
 - Merchandiser
 - Order_Management_Agent
 - Order_Management_Operations_Manager
 - Order_Management_Shopper
- Page Navigation:** 1-25 of 29, 0 Selected, Page 1 of 2



Edit with WPS Office

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' section selected. A sub-menu for 'Users' is open, showing options like 'User Management Settings' and 'Users'. The main window displays a 'Create' form for a new permission set. The 'Enter permission set information' section includes fields for 'Label' (set to ' '), 'API Name' (set to ' '), and 'Description'. Below this, a note about session activation is present. The 'Select the type of users who will use this permission set' section contains a note about license assignment and a dropdown for 'License' which is set to 'None'. Buttons for 'Save' and 'Cancel' are at the bottom.

This screenshot is identical to the one above, but with different input values. In the 'Label' field, the word 'salesmanager' has been typed. The 'API Name' field also contains 'salesmanager'. All other fields and sections remain the same as in the first screenshot.



Edit with WPS Office

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

- Left Sidebar:** Shows the navigation tree under the "Users" category, including "Permission Set Groups", "Permission Sets", "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings", "Users", "Feature Settings", "Data.com", "Prospector", "Service", "Embedded Service", "User Interface", and "App Menu".
- Top Bar:** Includes tabs for "Setup", "Home", "Object Manager", and a search bar.
- Central Content:** Displays the "Permission Sets" page for the "salesmanager" permission set. The "Permission Set Overview" section shows the API Name as "salesmanager", Namespace Prefix as "", and Created By as "GOPAL_S" on "01/10/2023, 7:29 pm". It also lists "Session Activation Required" and "Last Modified By".
- Right Side:** A sidebar with sections for "Assigned Apps", "Assigned Connected Apps", "Object Settings", "App Permissions", "Apex Class Access", "Visualforce Page Access", "External Data Source Access", and "Flow Access".

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

- Left Sidebar:** Shows the navigation tree under the "Users" category, including "Permission Set Groups", "Permission Sets", "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings", "Users", "Feature Settings", "Data.com", "Prospector", "Service", "Embedded Service", "User Interface", and "App Menu".
- Top Bar:** Includes tabs for "Setup", "Home", "Object Manager", and a search bar.
- Central Content:** Displays the "Permission Sets" page for the "salesmanager" permission set. The "Permission Set Overview" section shows the API Name as "salesmanager", Namespace Prefix as "", and Created By as "GOPAL_S" on "01/10/2023, 7:29 pm". It also lists "Session Activation Required" and "Last Modified By".
- Right Side:** A sidebar with sections for "Object Settings", "Object Name", "Object Permissions", "Total Fields", and "Tab Settings". The table lists various objects and their permissions.

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



Edit with WPS Office

The screenshot shows the Salesforce Setup interface under the Users section. A permission set named "salesmanager" is selected. In the "Object Permissions" section, the "Read" and "Edit" checkboxes for the "Bank" object are checked. The "Field Permissions" section shows that "Read Access" is checked for all fields: "Bank Name", "Created By", and "Last Modified By".

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

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

The screenshot shows the same Salesforce Setup interface and permission set "salesmanager". After changes, the "Read" and "Edit" checkboxes for the "Bank" object are unchecked. The "Field Permissions" section now shows that "Edit Access" is checked for all fields: "Bank Name", "Created By", and "Last Modified By".

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



Edit with WPS Office

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing the 'Users' section under 'User Management Settings'. The main content area is titled 'salesmanager' and shows the 'Current Assignments' section. It features a decorative illustration of a cactus and a sun. Below the illustration, a message reads 'No assignments defined.'

The screenshot shows the 'Select Users to Assign' dialog box. The left sidebar is identical to the previous screenshot. The main content area is titled 'Select Users to Assign' and shows a list of 'All Users'. The list includes columns for Full Name, Username, Role, and Profile. One user, 'madhu b', has a checked checkbox next to their name, indicating they are selected for assignment.

Full Name	Username	Role	Profile
Amelia Ellington	aelli	Force.com - App Subscription User	
Chatter Expert	chatty.00d5j00000bcskkeab.lobfwmpqike@chatter.salesforce	Chatter Free User	
Diya Adanna	test_diya_pas.4w8bjyb9wik.tszrgsbkpx.3gj8ofovwns.hl43bkzw6mea@gmail.com	UMS User	
GOPAL S	kiot520@gmail.com	System Administrator	
Integration User	integ	Analytics Cloud Integration User	
madhu b	mb	salesmanage	
Security User	sec	Analytics Cloud Security User	
sowmya bala	sbala	Manager	



Edit with WPS Office

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

Time zone: Select a time zone...

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

Cancel Assign

PERMISSION SET 'SALESMANAGER'

1 assignments were successful.

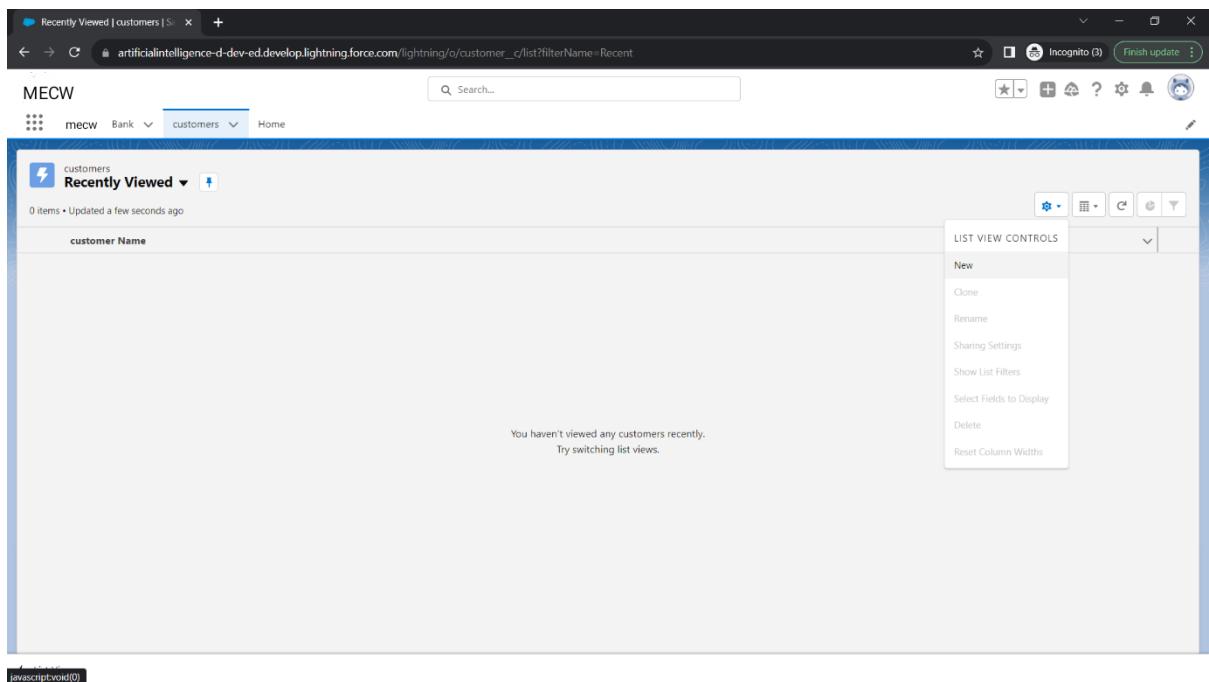
Assignment Summary

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

Done



Edit with WPS Office



javascript:void(0)



Edit with WPS Office

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]



Edit with WPS Office

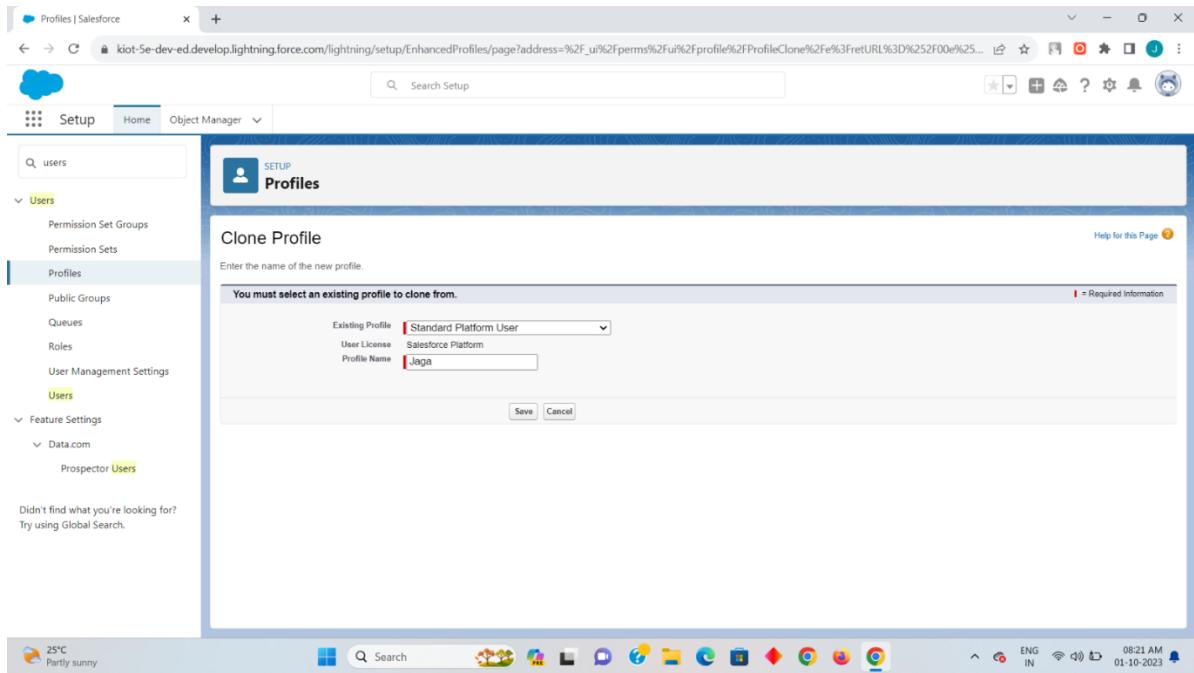
The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar includes sections for Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, Users (selected), Feature Settings, and Data.com. A note at the bottom says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Profiles" and shows a table of existing profiles. The columns are "Action", "Profile Name", "User License", and "Custom". The "User License" column contains various license names like Analytics Cloud Integration User, Authenticated Website, Chatter External, Chatter Free, Contract Manager, XOrg Proxy User, Salesforce, Customer Community Login, and Customer Community Plus. The "Custom" column has checkboxes, many of which are checked. At the bottom of the table, it says "1-25 of 41" and "0 Selected". The top right of the page has a "Help for this Page" link and a "All" link. The bottom right shows the date and time as "01-10-2023 08:20 AM".

Step 2:

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



Edit with WPS Office



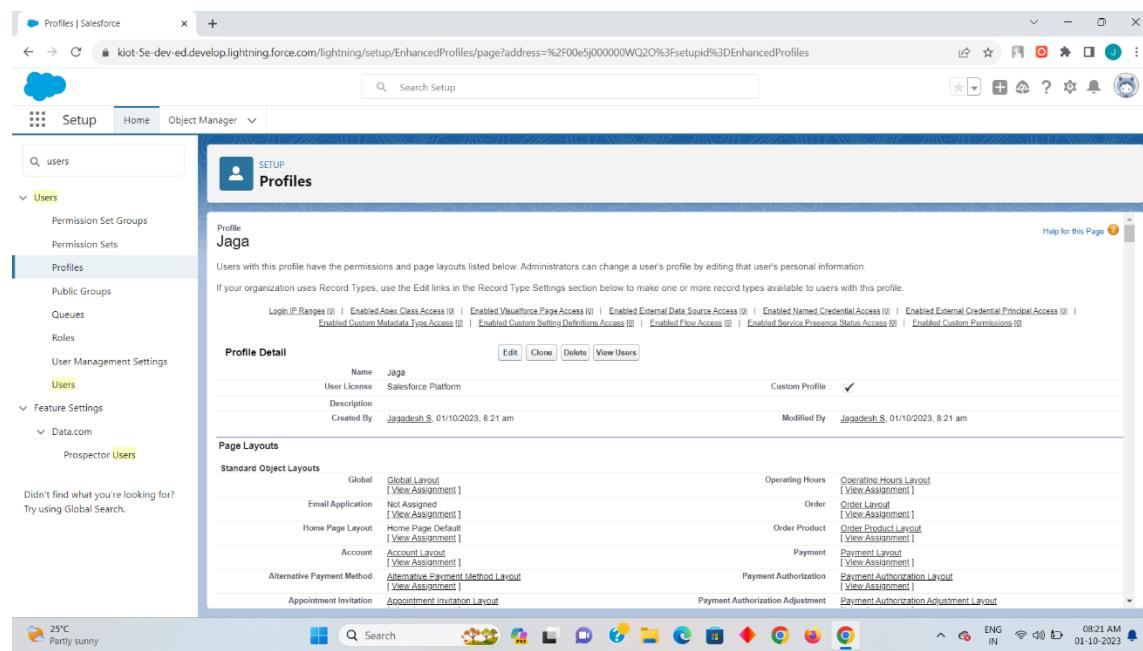
Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.



Edit with WPS Office

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.



Edit with WPS Office

Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Users

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

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

SETUP Profiles

Communication Subscription Consent Types

	Communication Subscription Consents	Communication Subscription Timings	Contacts	Contact Point Addresses	Contact Point Consents	Contact Point Emails	Locations	Party Consents	Push Topics	Sellers	Streaming Channels	User External Credentials
Basic Access	<input checked="" type="checkbox"/>											
Create	<input checked="" type="checkbox"/>											
Edit	<input checked="" type="checkbox"/>											
Delete	<input checked="" type="checkbox"/>											
View All	<input checked="" type="checkbox"/>											
Modify All	<input checked="" type="checkbox"/>											

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees.

- Separate Experience Cloud site and Salesforce login authentication for employees.
- Relax login IP restrictions.
- Skip employee device activation during Experience Cloud site login.

25°C Partly sunny

08:21 AM 01-10-2023

Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Users

- Permission Set Groups
- Permission Sets
- Profiles**
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
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Didn't find what you're looking for?
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SETUP Profiles

Communication Subscription Consent Types

	Communication Subscription Consents	Communication Subscription Timings	Contacts	Contact Point Addresses	Contact Point Consents	Contact Point Emails	Locations	Party Consents	Push Topics	Sellers	Streaming Channels	User External Credentials
Basic Access	<input checked="" type="checkbox"/>											
Create	<input checked="" type="checkbox"/>											
Edit	<input checked="" type="checkbox"/>											
Delete	<input checked="" type="checkbox"/>											
View All	<input checked="" type="checkbox"/>											
Modify All	<input checked="" type="checkbox"/>											

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees.

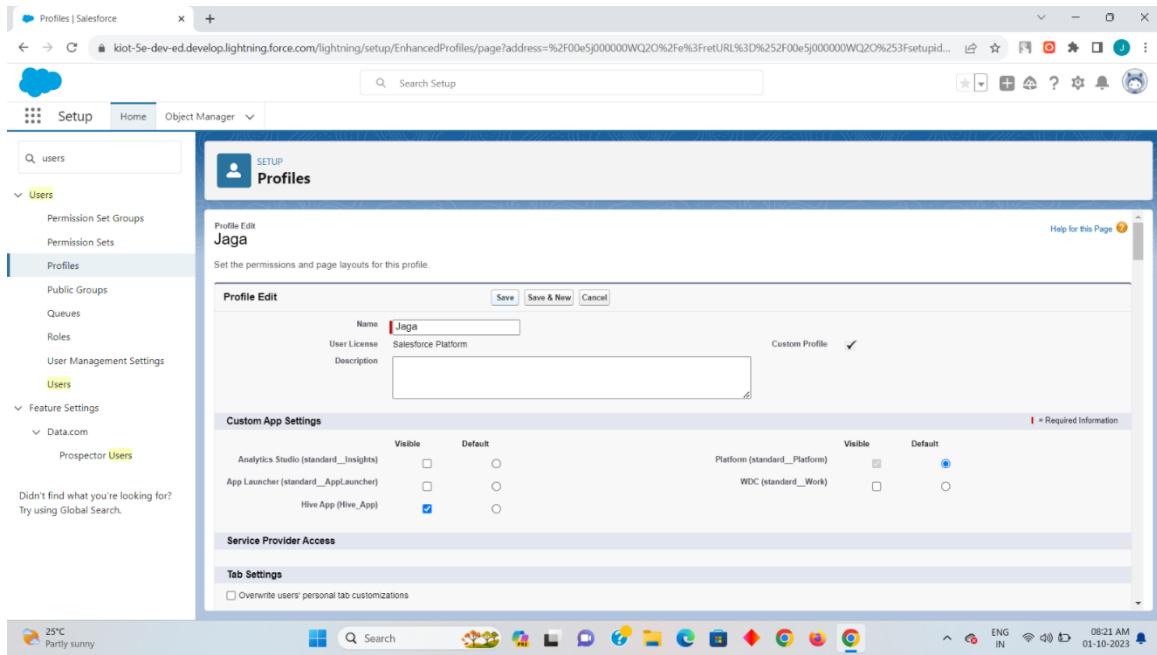
- Separate Experience Cloud site and Salesforce login authentication for employees.
- Relax login IP restrictions.
- Skip employee device activation during Experience Cloud site login.

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08:21 AM 01-10-2023



Edit with WPS Office

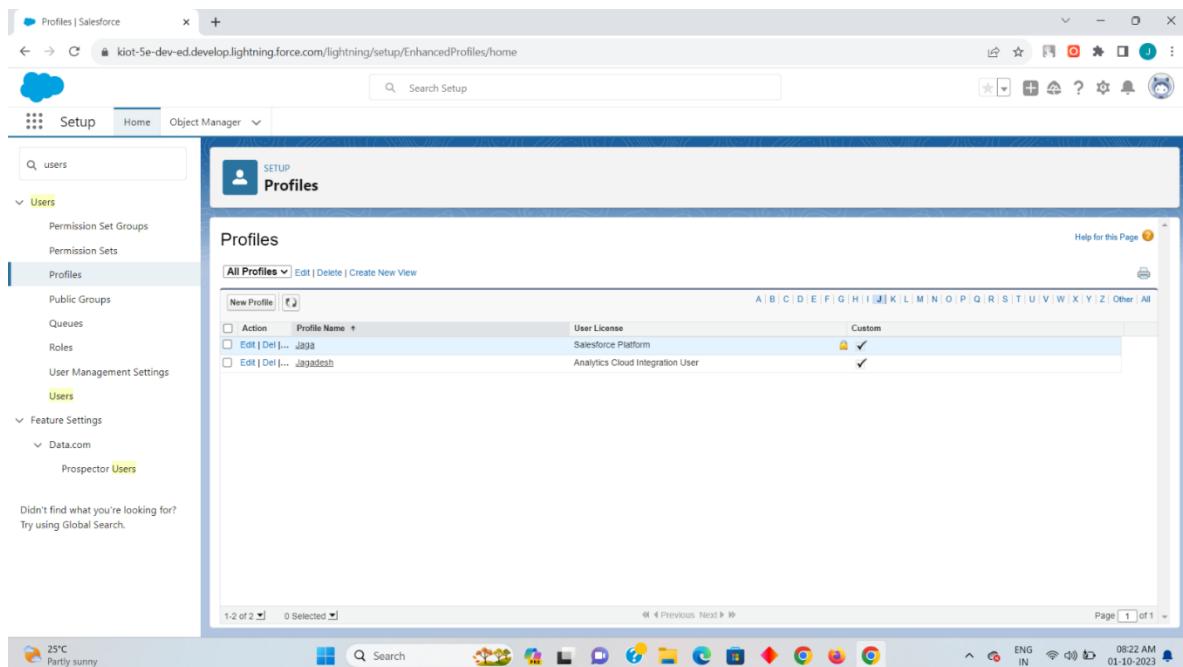


Step 4

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



Edit with WPS Office



Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user



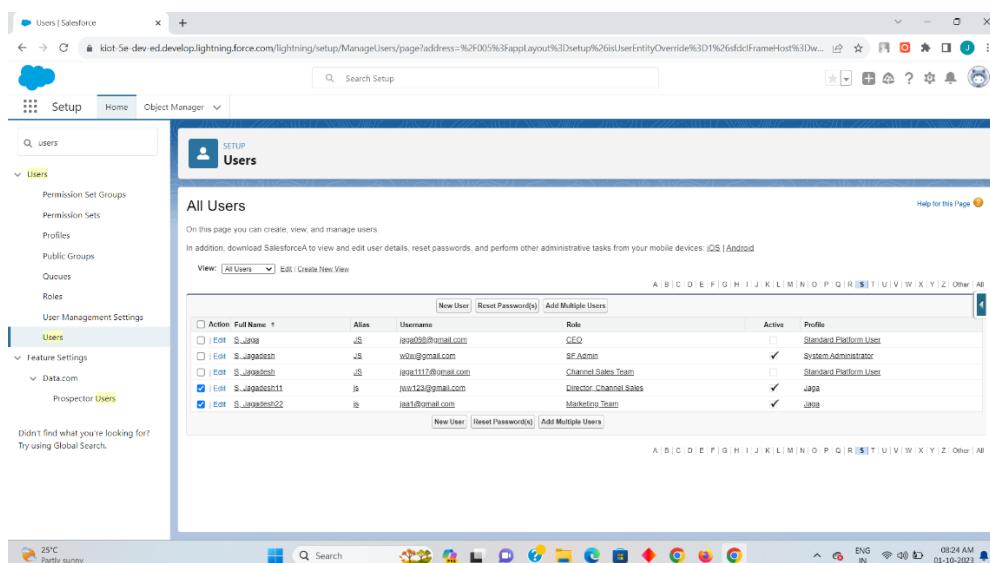
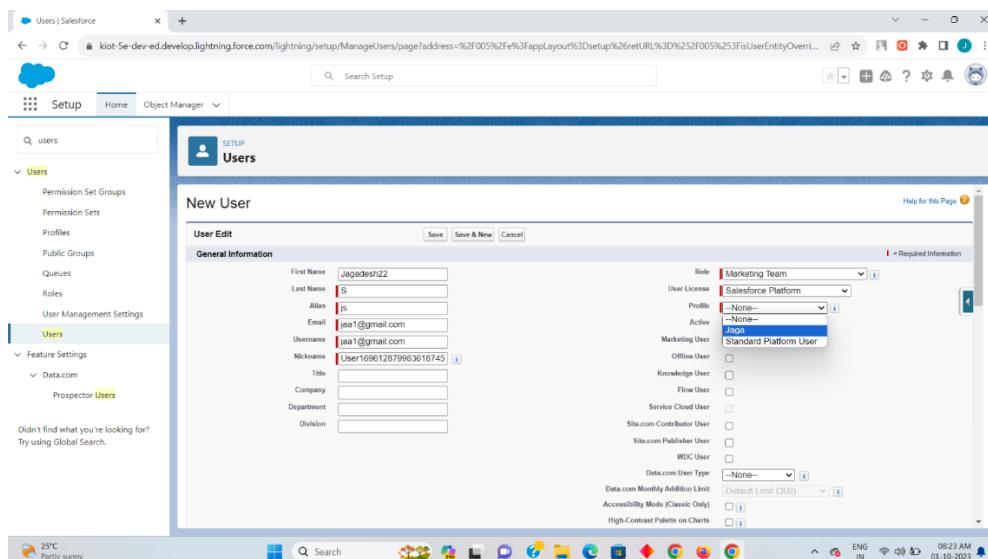
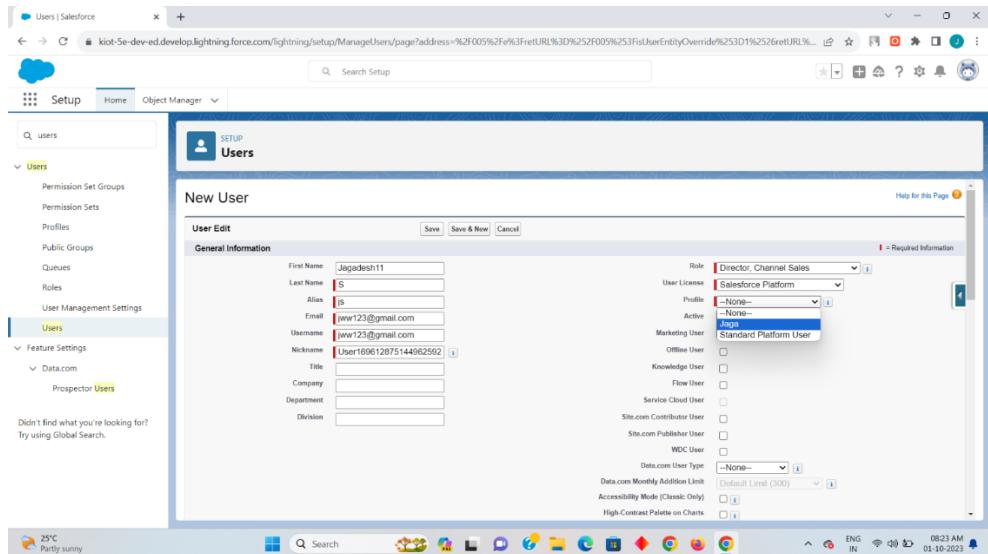
Edit with WPS Office

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty@00d500000c0joseaf.6z@bkrked4i@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Grey Jane	jgrey	jane_gray.vgnimmoalm.cz7d2kogt3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	S_Jaga	JS	jaga096@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S_Jagadesh	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S_Jagadesh	JS	jaga117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	Integ	integration@00d500000c0joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d500000c0joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User



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

Step 6:

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

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



Edit with WPS Office

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

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SETUP Permission Sets

Help for this Page

Permission Sets

On this page you can create, view, and manage permission sets. In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android

All Permission Sets | Edit | Delete | Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories, includes all Buyer capabilities, and allows access to manage carts and orders.	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Deli Clone	Experience Profile Manager	Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, publications, queues, and other facility-related data.	Facility Manager
<input type="checkbox"/>	Field Service Mobile	Give your mobile workforce access to the Field Service mobile app. Service workers can log in to the app and access their tasks.	Field Service Mobile
<input type="checkbox"/>	Merchandise	Allow access to commerce merchandising features.	Commerce Merchandise 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

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

1-25 of 30 0 Selected

Page 1 of 2

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06:24 AM ENG IN 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

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SETUP Permission Sets

Help for this Page

Permission Set Create

Enter permission set information

Label: permission12

API Name: permission12

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License: -None-

Save Cancel

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08:24 AM ENG IN 01-10-2023



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

- Page Title:** Permission Sets | Salesforce
- URL:** kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgt%3FsfdclFrameOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...
- Header:** Search Setup, Home, Object Manager
- Left Sidebar:** Users (selected), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (selected), Feature Settings, Data.com, Prospectors (Users)
- Main Content:**
 - Section:** Permission Sets
 - Permission Set:** permission12
 - Buttons:** Find Settings, Clone, Delete, Edit Properties, Manage Assignments
 - Permission Set Overview:**
 - Description: License
 - Session Activation Required:
 - Last Modified By: Jagadeesh S. 01/10/2023, 8:24 am
 - API Name: permission12
 - Namespace Prefix:
 - Created By: Jagadeesh S. 01/10/2023, 8:24 am
 - 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.
 - Select 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:**

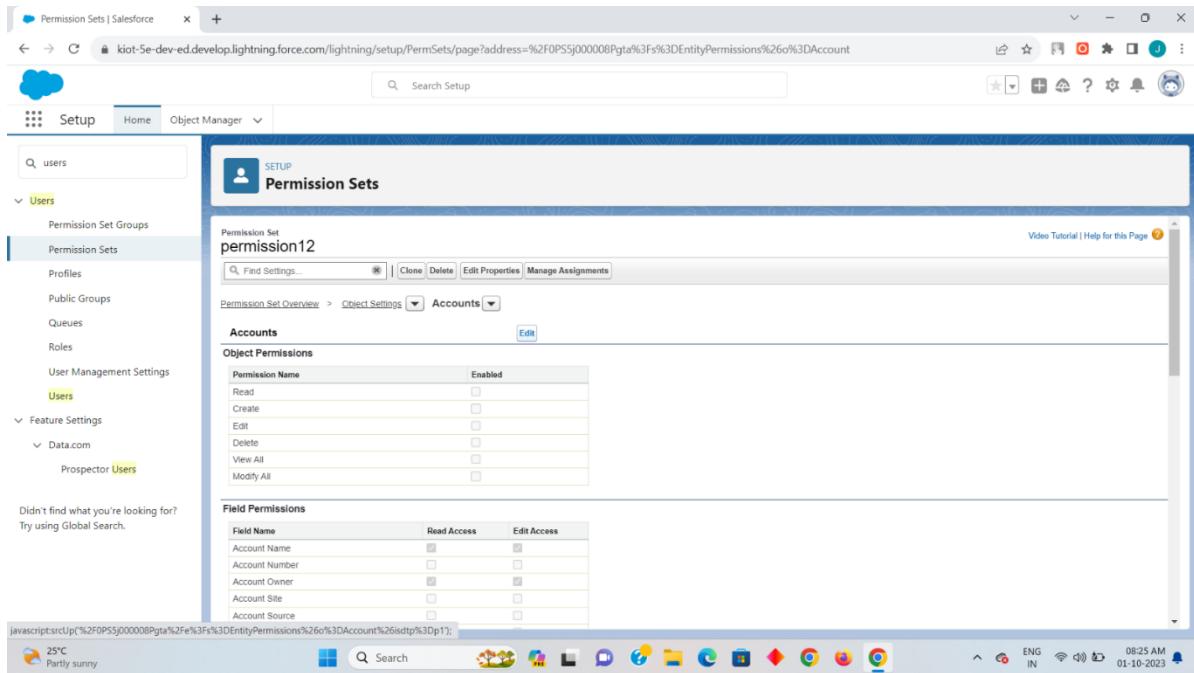
The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Permission Sets | Salesforce
- URL:** kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgt%3DEntityPermissions
- Header:** Search Setup, Home, Object Manager
- Left Sidebar:** Users (selected), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (selected), Feature Settings, Data.com, Prospectors (Users)
- Main Content:**
 - Section:** Permission Sets
 - Permission Set:** permission12
 - Buttons:** Find Settings, Clone, Delete, Edit Properties, Manage Assignments
 - Permission Set Overview > Object Settings:**
 - Object Settings:**

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



Edit with WPS Office

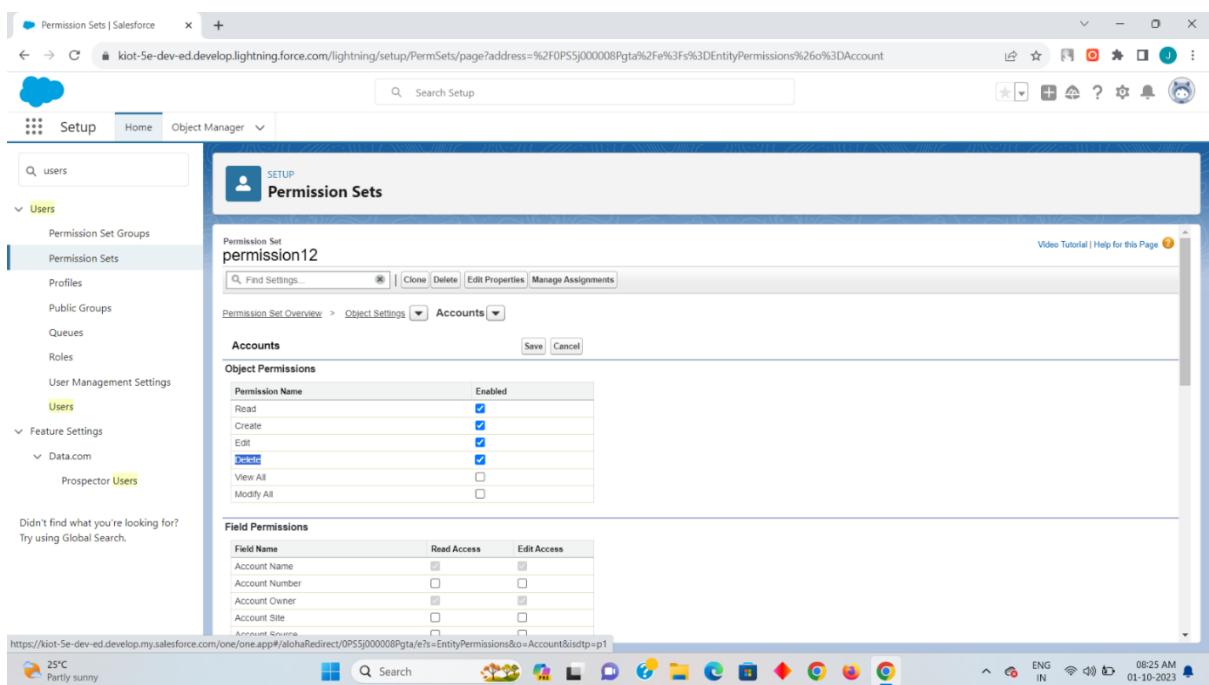
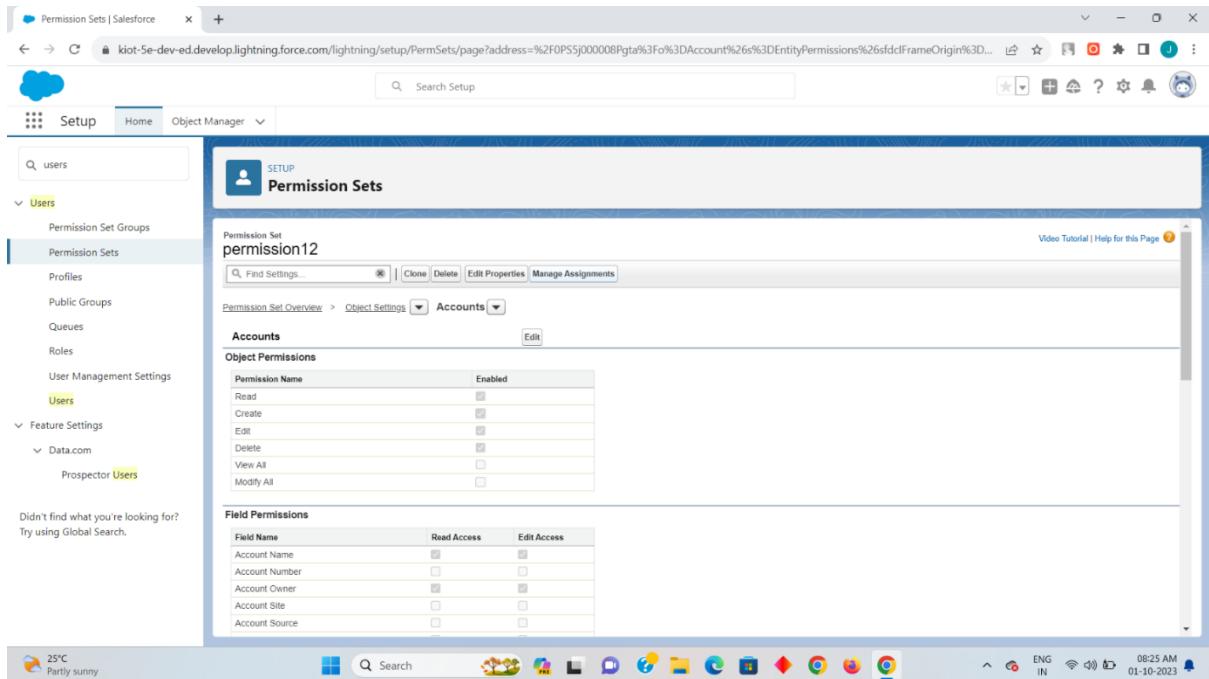


Step 7:

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.



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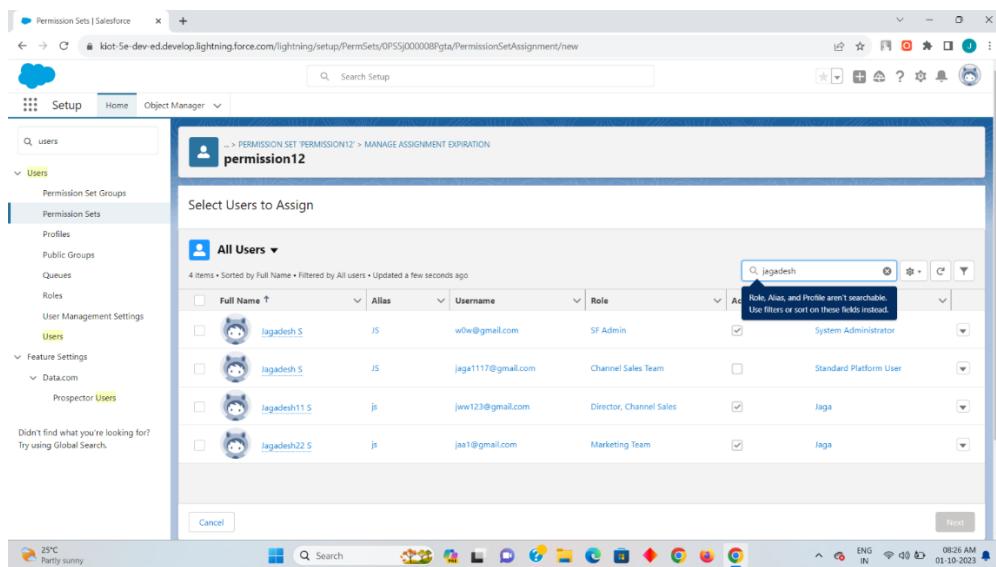
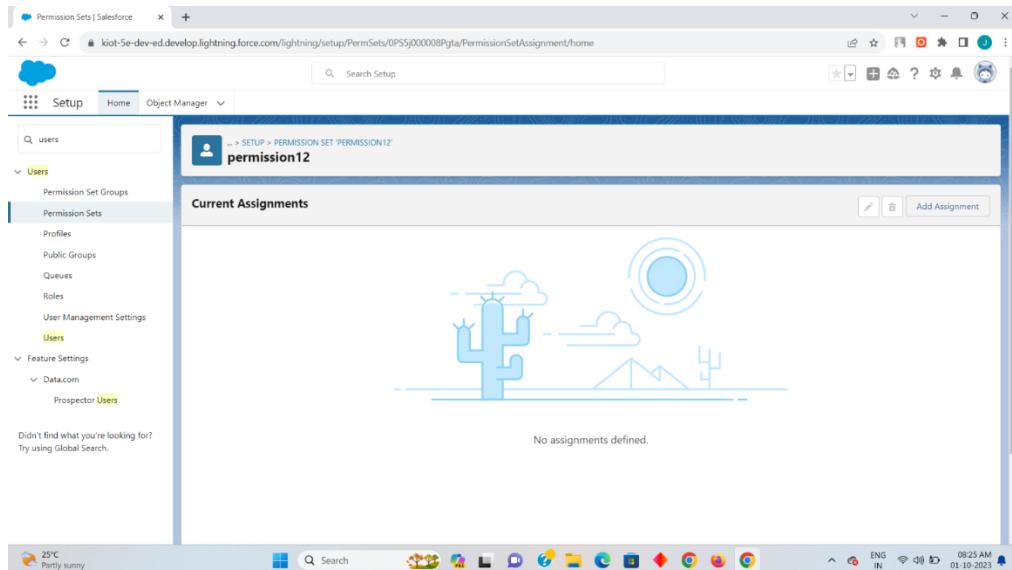
Step 8

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



Edit with WPS Office

and then click on assign so that the specific selected user can have a special access as delete on it.



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The screenshot shows the 'PERMISSION SET PERMISSION12 > MANAGE ASSIGNMENT EXPIRATION' page. On the left, the navigation sidebar is open with 'Users' selected under 'Permission Sets'. The main area displays a table titled 'Select Users to Assign' with the following data:

Full Name	Role	Active	Profile
Jagadesh S	SF Admin	<input checked="" type="checkbox"/>	System Administrator
Jagadesh S	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
Jagadesh11 S	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
Jagadesh22 S	Marketing Team	<input checked="" type="checkbox"/>	Jaga

At the bottom right of the table is a 'Next' button.

Click on next.

The screenshot shows the 'PERMISSION SET PERMISSION12 > MANAGE ASSIGNMENT EXPIRATION' page. The 'Permission Sets' tab is selected in the sidebar. The main area displays a table titled 'Select an Expiration Option For Assigned Users' with the following data:

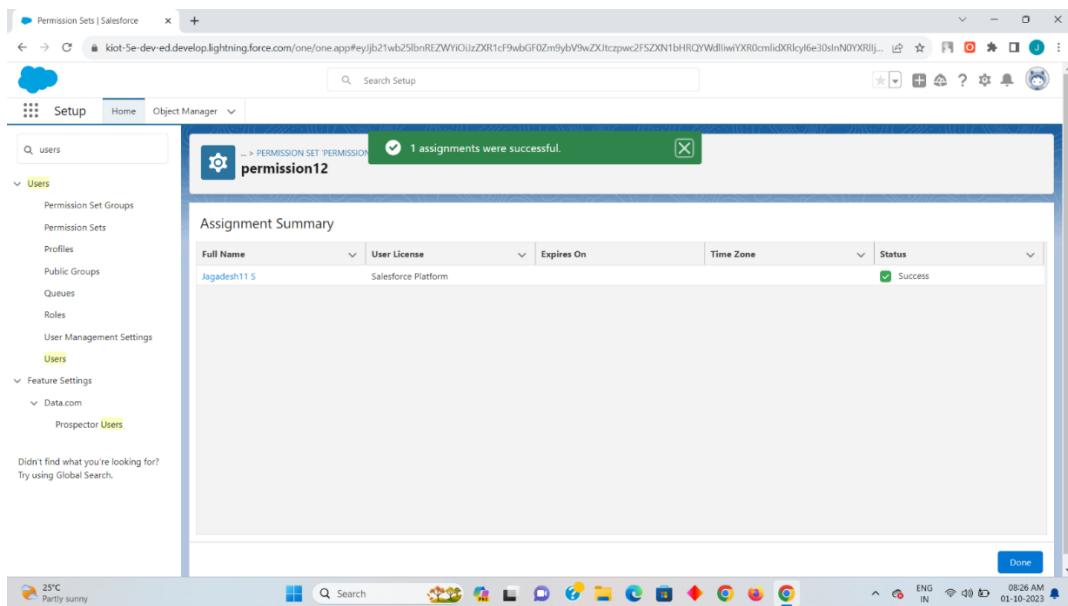
Full Name	Role	Profile	Active	User License	Expires On
Jagadesh11 S	Director, Channel Sales	Jaga	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires

At the bottom right of the table are 'Back' and 'Assign' buttons.

Now click on Assign.



Edit with WPS Office



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



Edit with WPS Office

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**.



Edit with WPS Office



SETUP > OBJECT MANAGER
Survey Result

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

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

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



Edit with WPS Office

screenshot.

The screenshot shows the Salesforce Email Template page for a template named "Thank You Email - Survey".

Details Tab:

- Email Template Name: Thank You Email - Survey
- Related Entity Type: Survey Result
- Description: Public Email Templates
- Made in Email Template Builder: checked

Message Content Tab:

- Subject: Thank You For Completing Our Survey!
- Enhanced Letterhead: Not selected
- HTML Value:

```
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
```

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**



Edit with WPS Office

Email Alert button.

4. Name the Email Alert and click the Tab button. The Unique Name will populate.
5. For Object select Survey Result.
6. For the Email Template chooses Lightning Email Template Thank You Email – Survey.
7. For Recipient Type select Email Field: Email.
8. Click Save.

Edit Email Alert
Survey - Thank You Email

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

Email Alert Edit

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: User

Recipients:

Available Recipients	Selected Recipients
User: Integration User User: Rakesh Gupta User: Security User	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.

Save Cancel



Edit with WPS Office

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**.



Edit with WPS Office

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 with WPS Office

Edit Create Records

Create Salesforce records using values from the flow.

* Label: Save Response * API Name: Save_Response

Description:

How Many Records to Create
 One
 Multiple

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

Create a Record of This Object
* Object: Survey Result

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text"/> A_a Comment X
Email__c	<input type="text"/> A_a Email > Value X
Name__c	<input type="text"/> (!Name.firstName) (!Name.lastName)
Rating__c	<input type="text"/> A_a Rating X
+ Add Field	
<input type="checkbox"/> Manually assign variables	

Cancel Done

Step 4.3: Salesforce Flow – Call an Action – Email Alert to Send Out Thank You Email

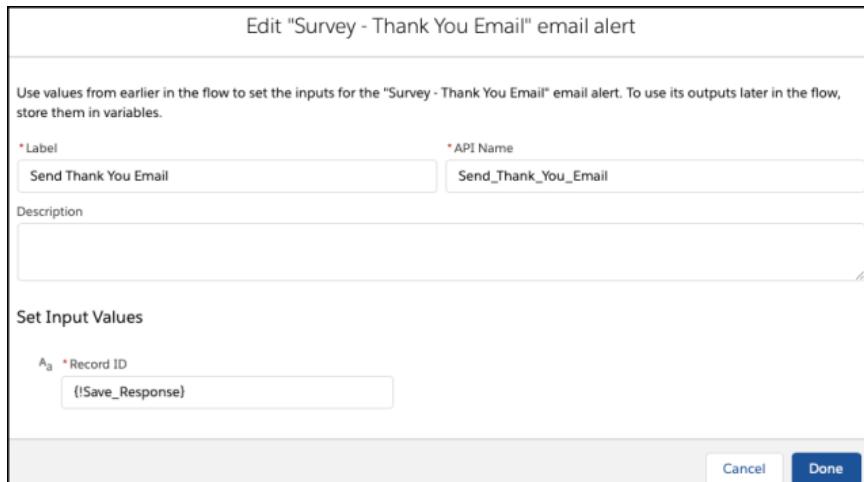
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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**.

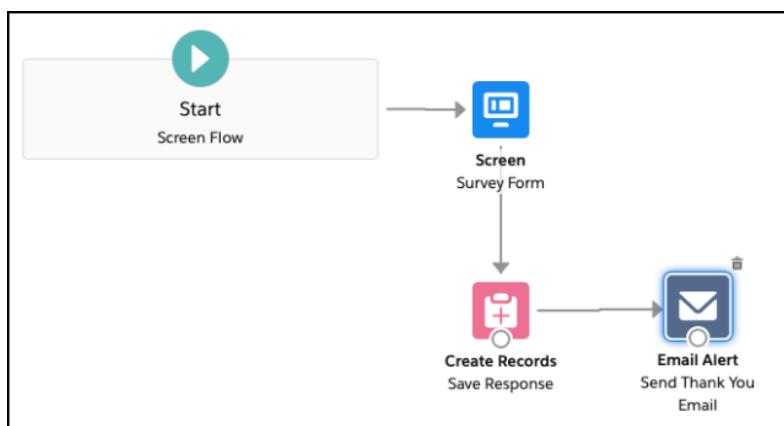


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- 4. Clicks on the Survey – Thank You Email email alert.**
- 5. Click Done.**



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



- 1. Click Save.**
- 2. Enter Flow Label the API Name will auto-populate.**
- 3. Click Show Advanced.**
- 4. How to Run the Flow: User or System Context—Depends on How Flow is**



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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

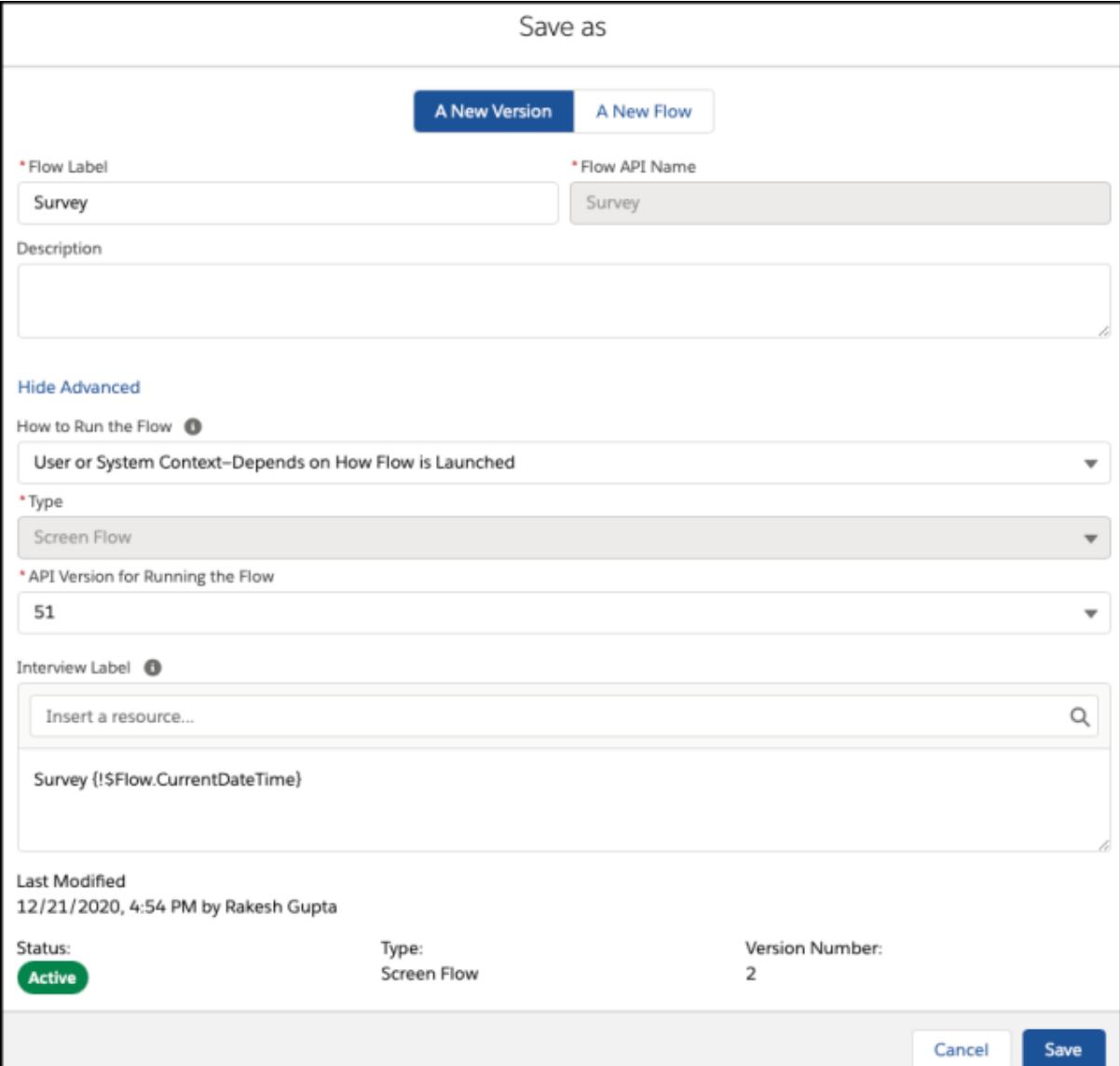
* API Version for Running the Flow 51

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



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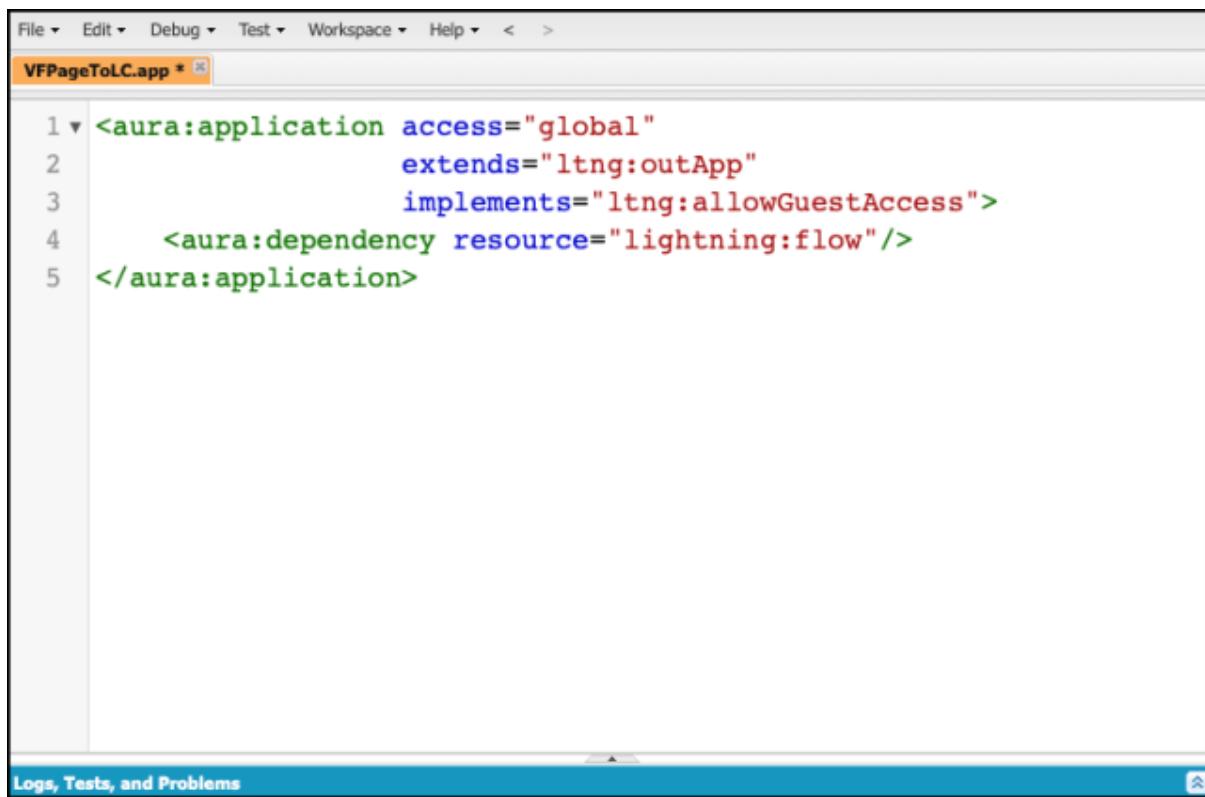
Visualforce Page

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.



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The screenshot shows the Eclipse IDE interface with the following details:

- Toolbar:** File, Edit, Debug, Test, Workspace, Help.
- Title Bar:** VFPageToLC.app *
- Code Editor:** Displays the following Aura component code:

```
1 <aura:application access="global"
2         extends="ltng:outApp"
3         implements="ltng:allowGuestAccess">
4             <aura:dependency resource="lightning:flow"/>
5         </aura:application>
```
- Bottom Bar:** Logs, Tests, and Problems

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



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

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

The screenshot shows the Visualforce Page Editor interface. At the top, there's a toolbar with 'Save', 'Quick Save', 'Cancel', 'Where is this used?', 'Component Reference', and 'Preview' buttons. Below the toolbar, the 'Page Information' section is visible, containing fields for 'Label' (Survey), 'Name' (Survey), and 'Description'. There are also checkboxes for 'Available for Lightning Experience, Experience Builder, mobile web, and the mobile app' and 'Require CSRF protection on GET requests'. The 'Visualforce Markup' tab is selected, displaying the following code:

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

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

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



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

Site Edit

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

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:



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Survey

Name

First Name
Alok

Last Name
Sinfal

*Email
[REDACTED]

*Rating
5 

*Comment
Awesome Blog 

Next

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

Thank You For Completing Our Survey!  

 Survey Site Guest User via b9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com
to me   

Hi Alok Sinfal,

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

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

Thanks,
Automation Champion



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