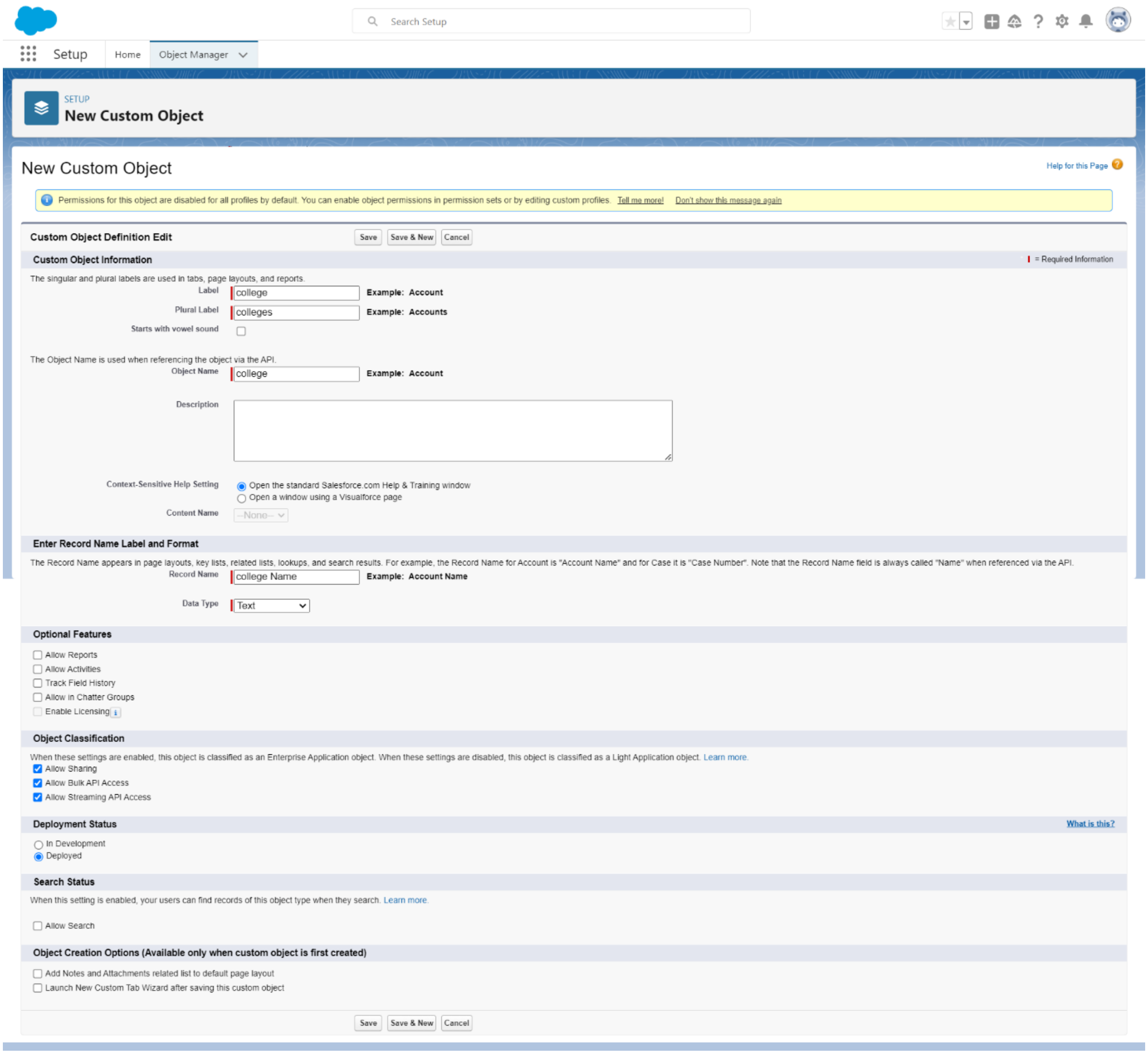
Naan Mudhalvan Salesforce Developer(Course) Assignment no 1

Name : Sobana R
Naan Mudhalvan id : au611420205041
Year & Dep : 4th year & IT
Batch : 2024
Zone no : Zone 8

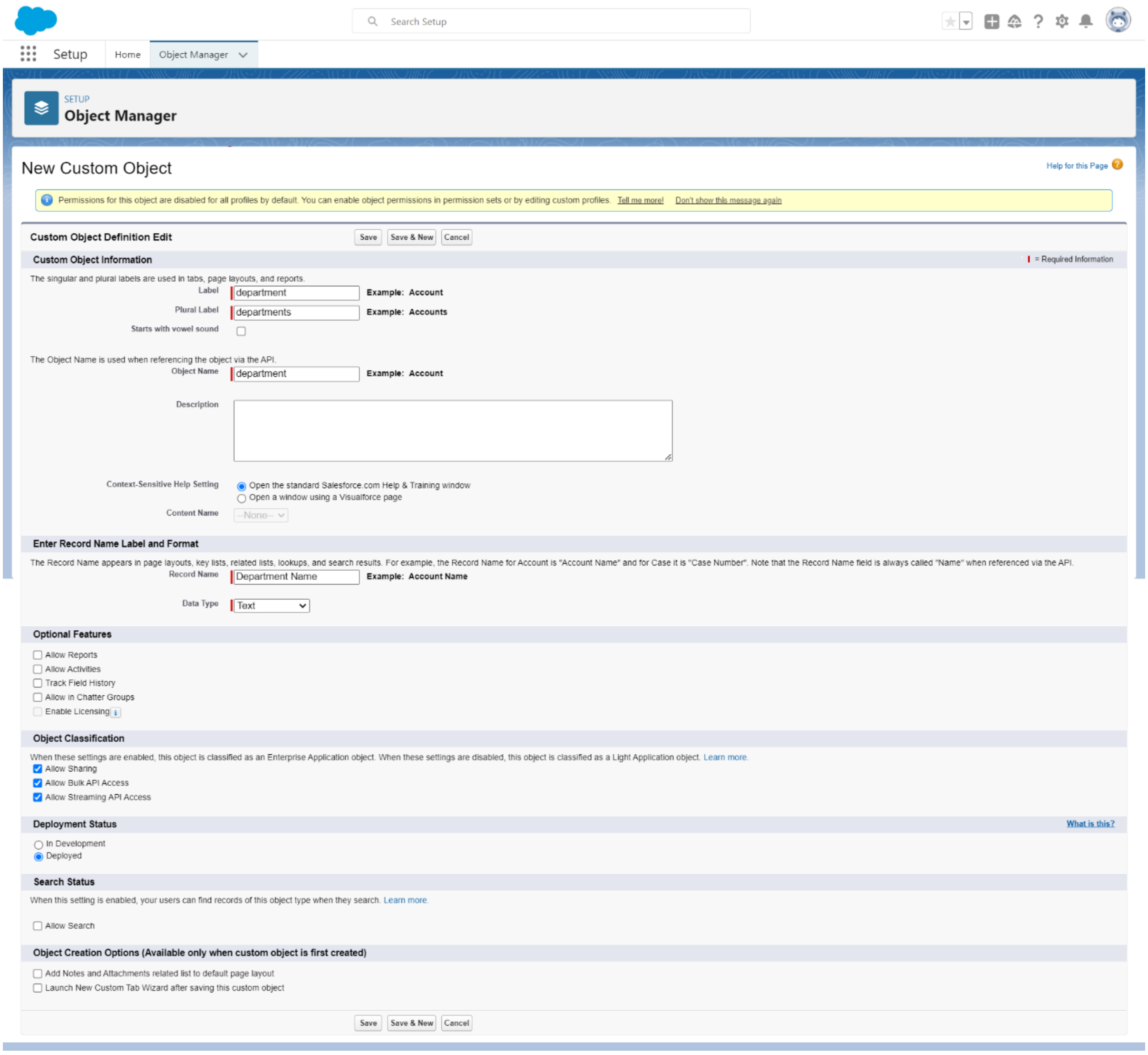
1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

Solution:
Step 1: Create Custom Objects

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



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



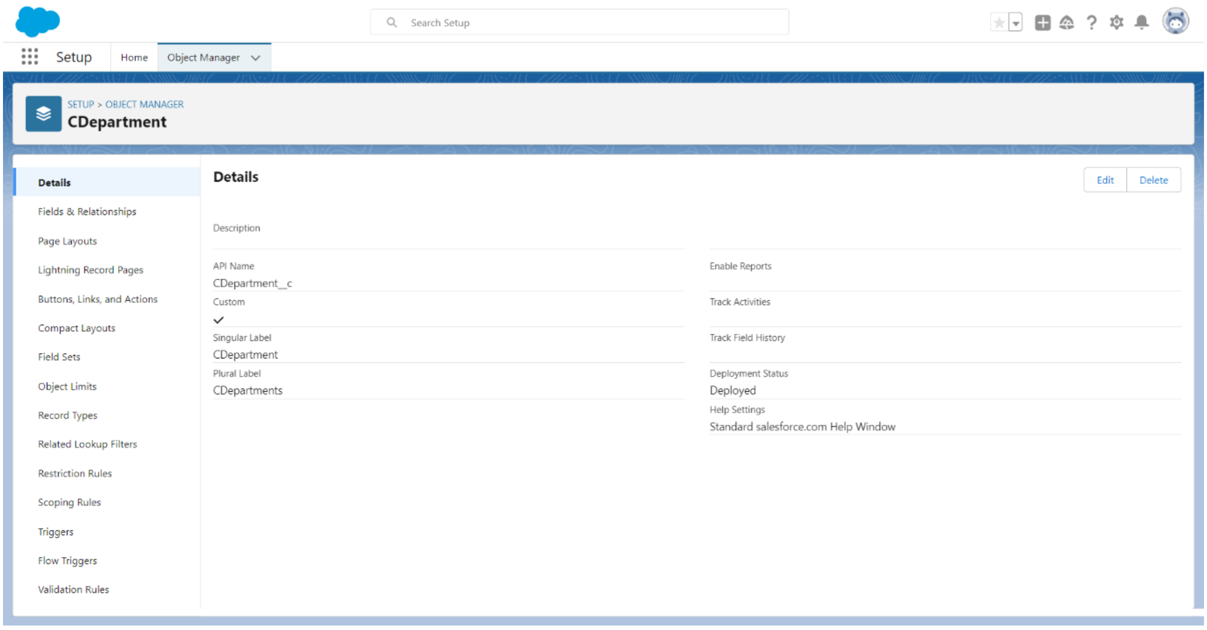
Step 2: Create a Master-Detail Relationship

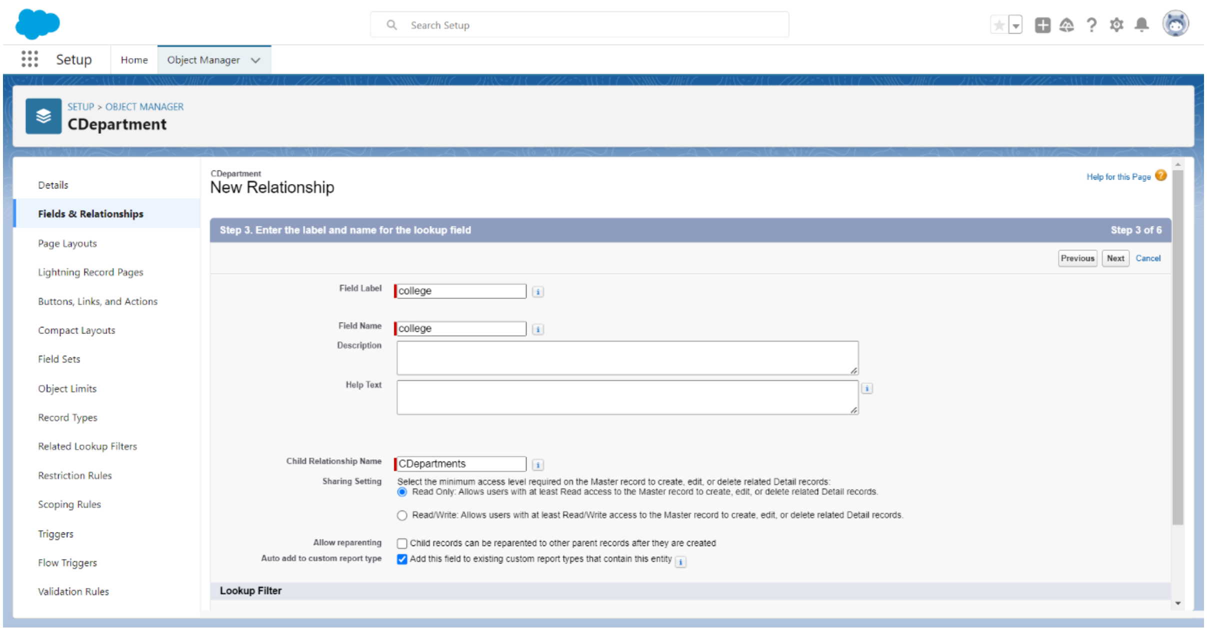
To create a Master-Detail relationship between these two custom objects, follow these steps:

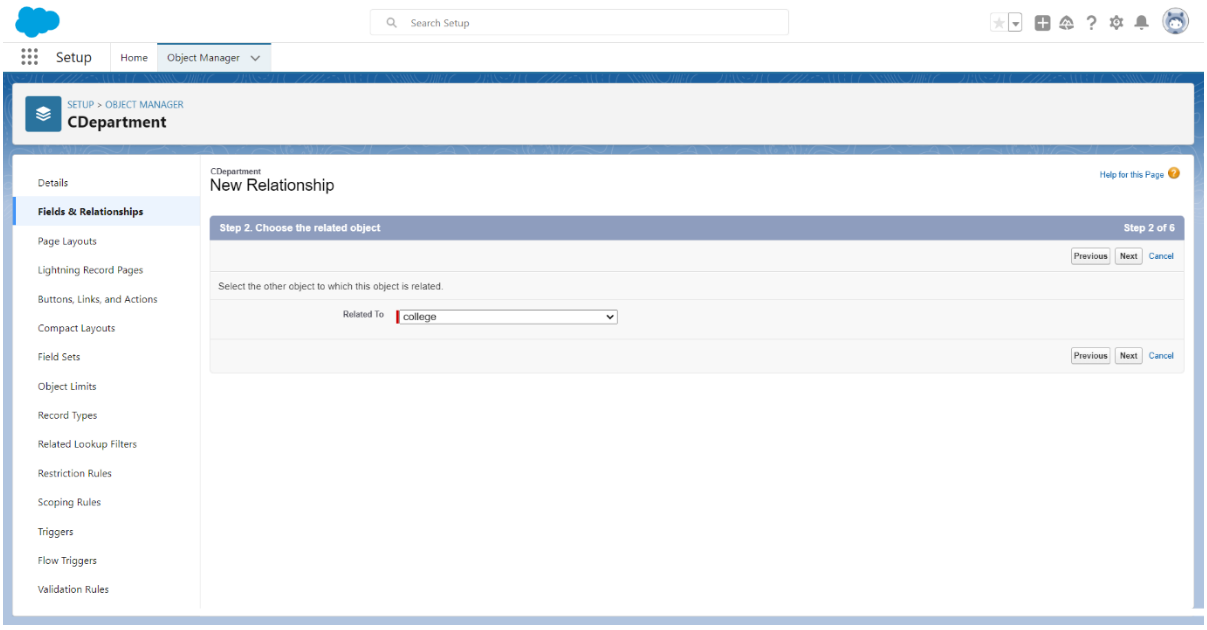
1. Go to Setup > Object Manager.
2. Click on "College__c" to open its

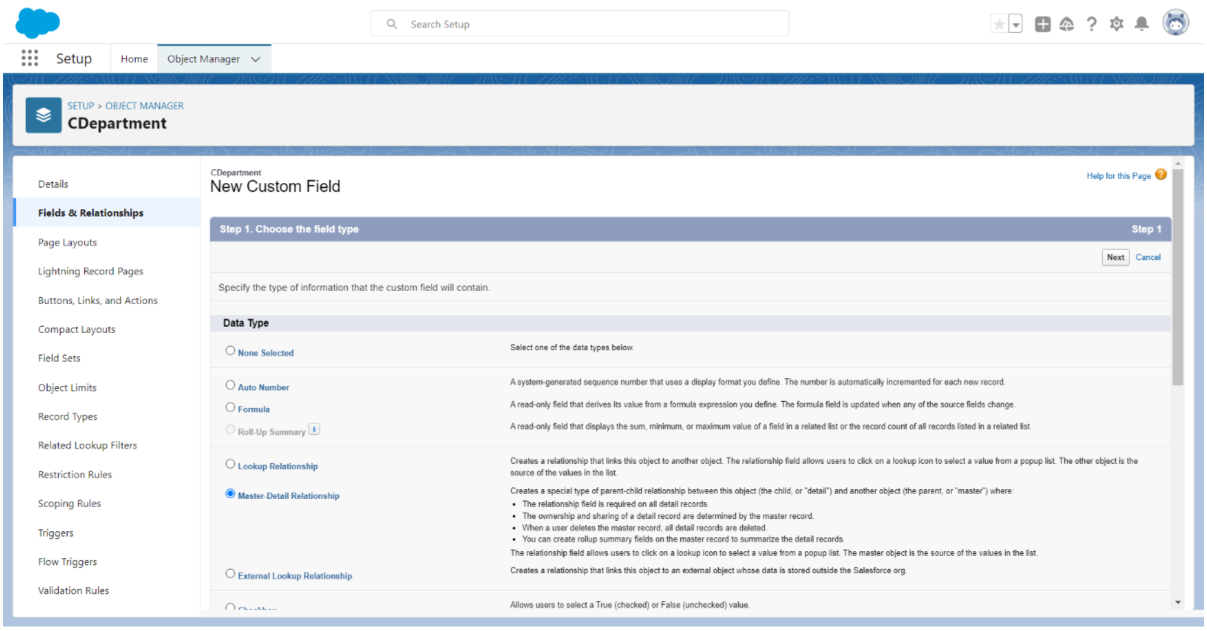
settings.

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


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
CDepartment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
Details
Edit
Delete
Description
API Name
CDepartment__c
Custom
Singular Label
CDepartment
Plural Label
CDepartments
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
CDepartment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
CDepartment
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
college
Field Name
college
Description
Help Text
Child Relationship Name
CDepartments
Sharing Setting
Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting
Child records can be reparented to other parent records after they are created
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Lookup Filter





Step 3: Create the Roll-Up Summary Field

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

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

2. Click the "New" button to create a new custom field.

3. Choose "Roll-Up Summary" as the data type.

4. Enter a label for the field, e.g.,

5. Choose "Count" as the Roll-Up Type.

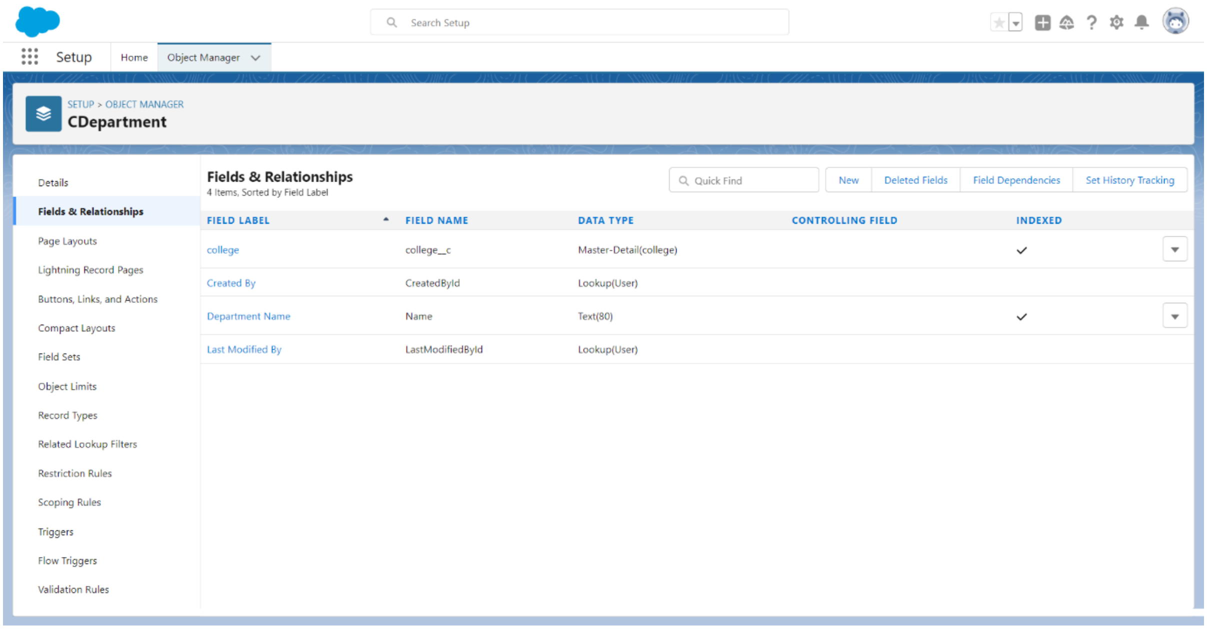
6. Select " Department__c" as the object to roll up information from.

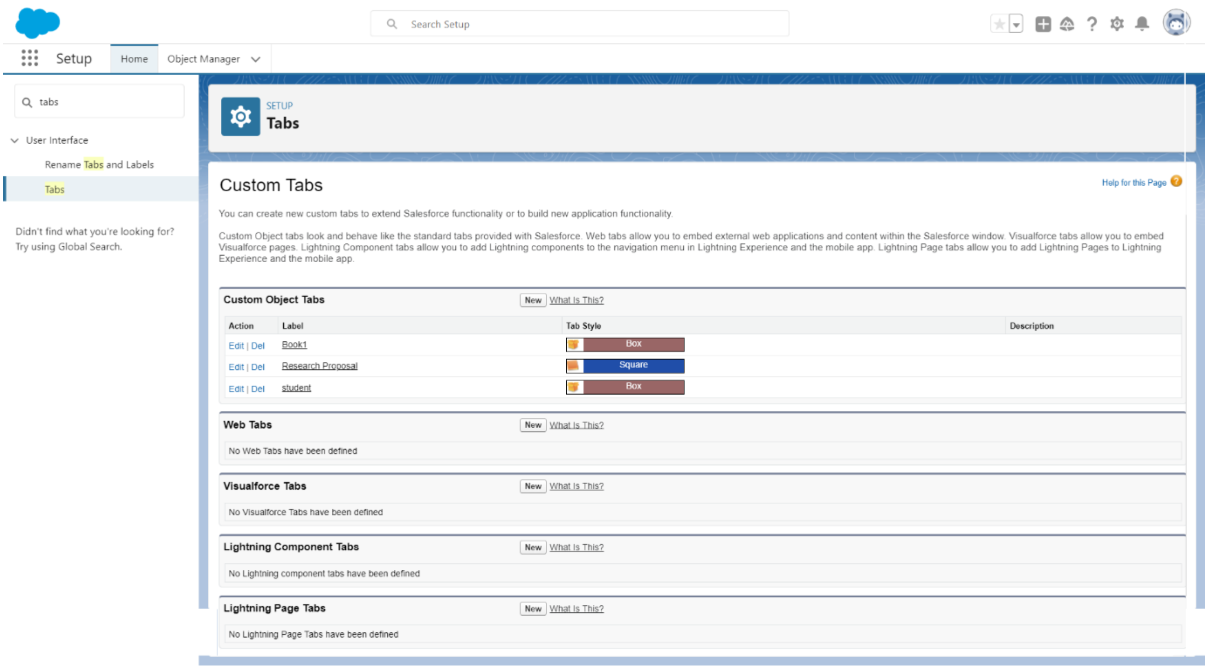
7. Specify the filter criteria if you want to filter the related records.

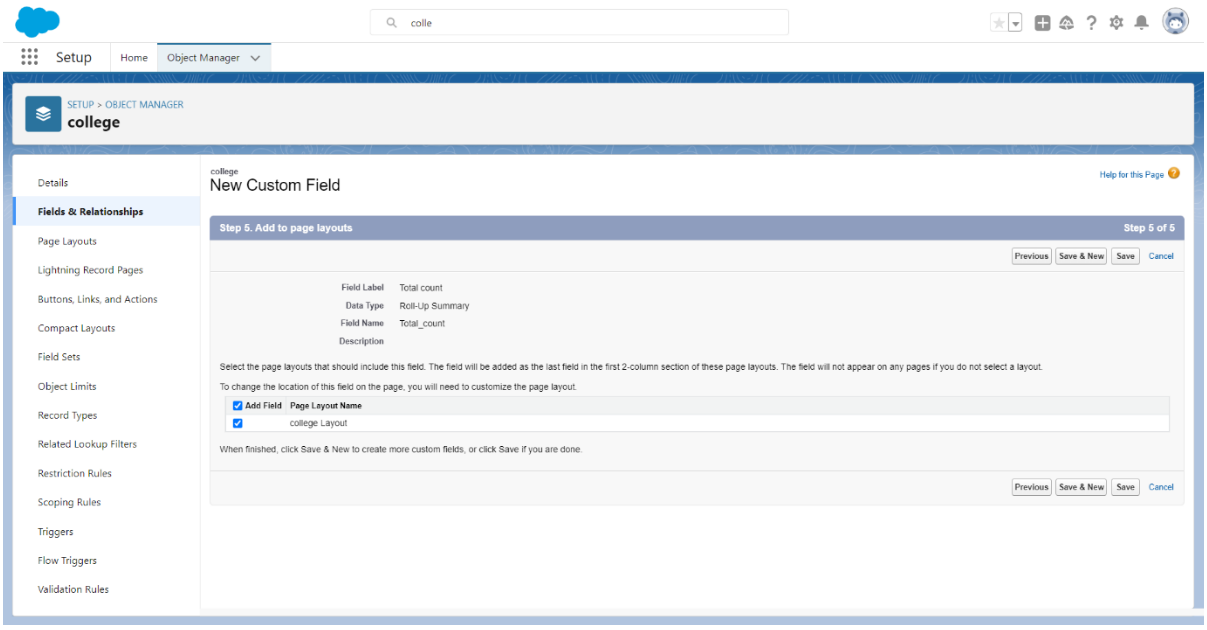
8. Configure other settings as needed and click "Next."

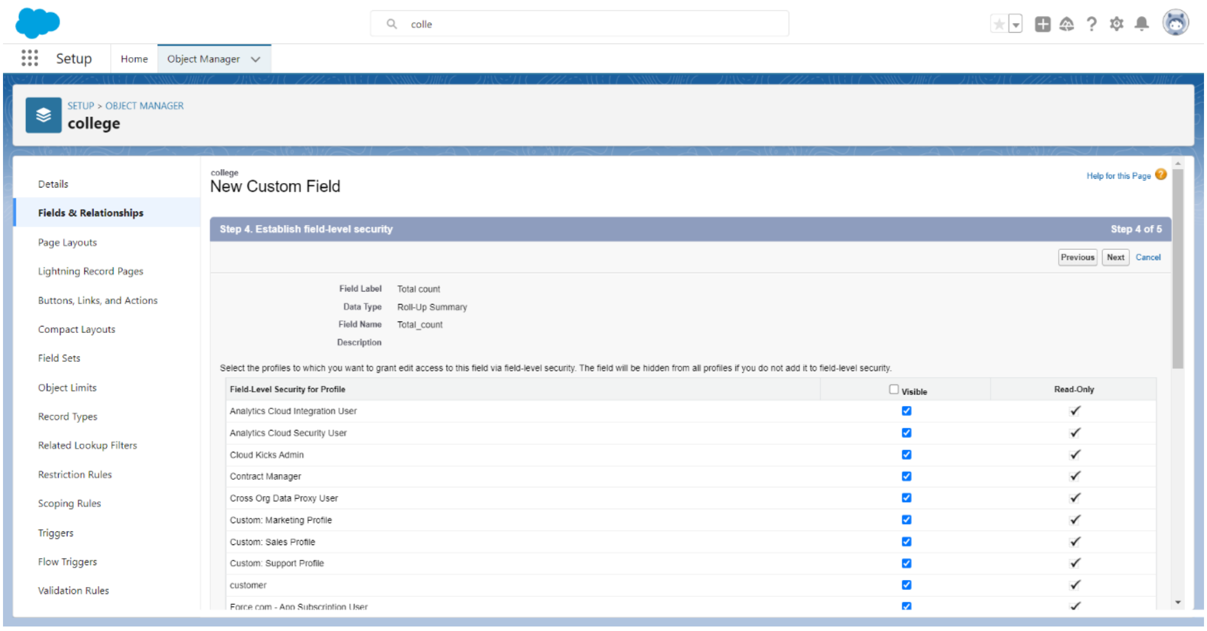
9. Specify the field-level security and add it to relevant page layouts.

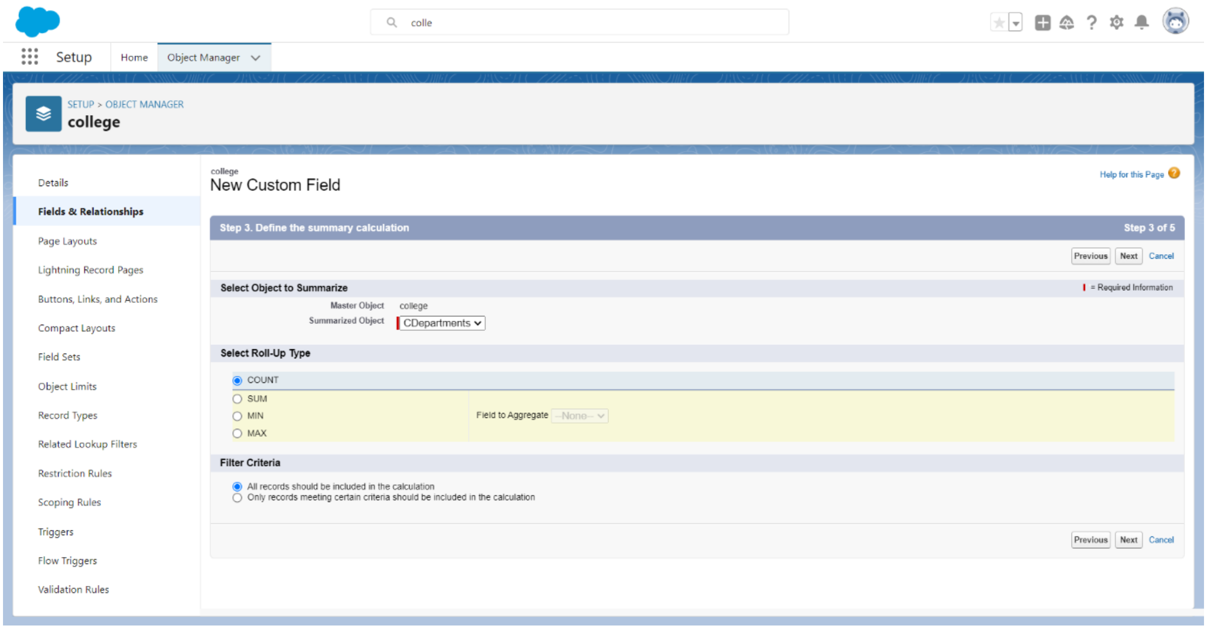
10. Click "Next" and "Save" to create the Roll-Up Summary Field.

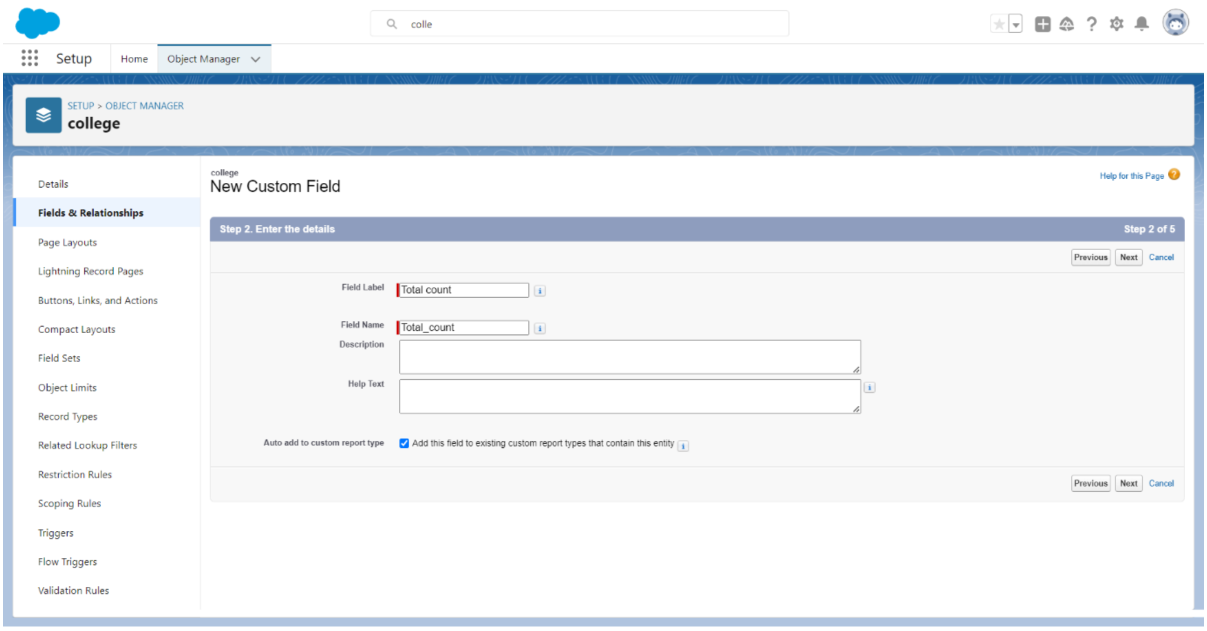

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
CDepartment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
Fields & Relationships
4 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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)

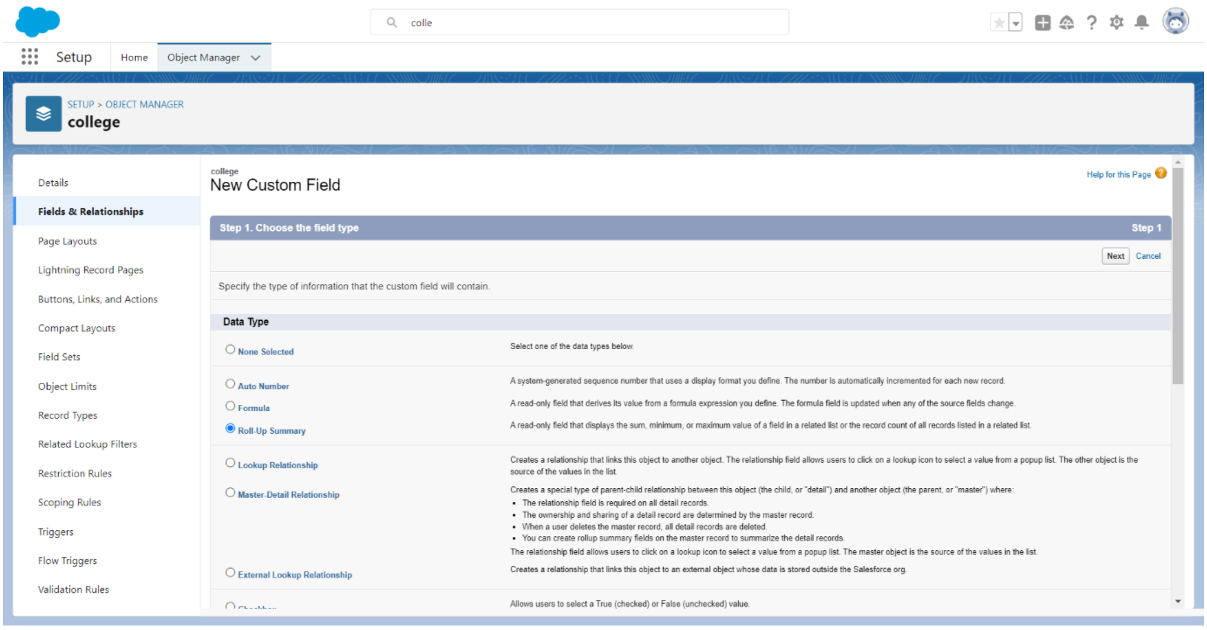

Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
Book1
Box
Edit | Del
Research Proposal
Square
Edit | Del
student
Box
Web Tabs
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

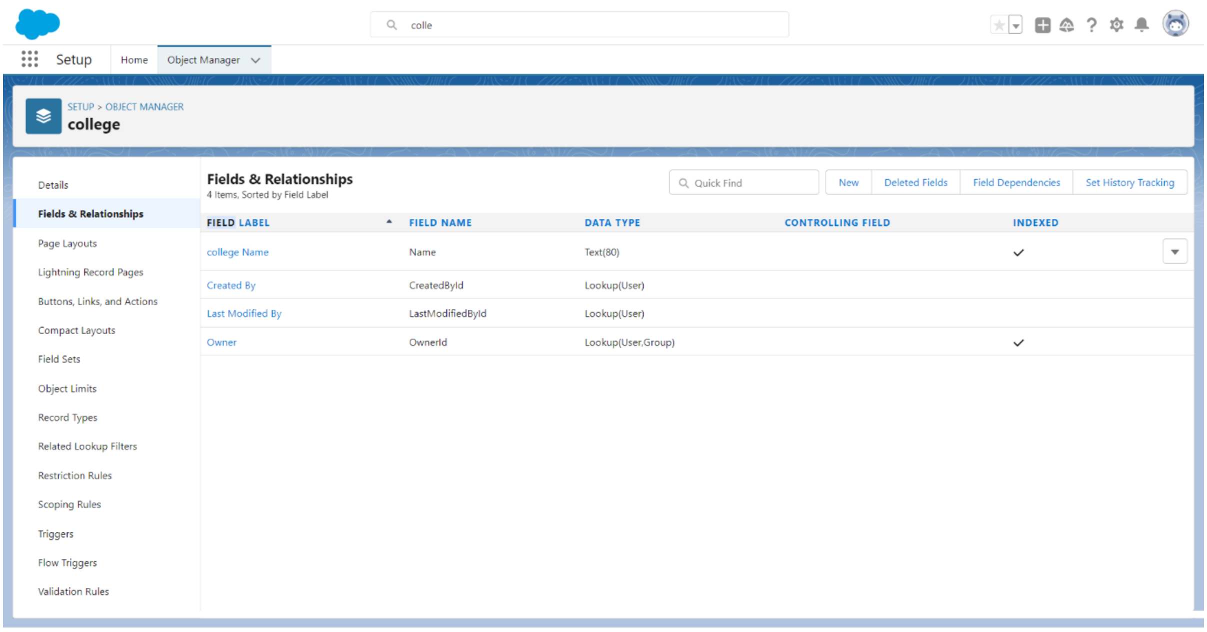

colle
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation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


colle
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 4. Establish field-level security
Step 4 of 5
Previous Next Cancel
Field Label Total count
Data Type Roll-Up Summary
Field Name Total_count
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Cloud Kicks Admin
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
customer


colle
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 3. Define the summary calculation
Step 3 of 5
Previous
Next
Cancel
Select Object to Summarize
= Required Information
Master Object
college
Summarized Object
CDepartments
Select Roll-Up Type
COUNT
SUM
MIN
MAX
Field to Aggregate
--None--
Filter Criteria
All records should be included in the calculation
Only records meeting certain criteria should be included in the calculation
Previous
Next
Cancel


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



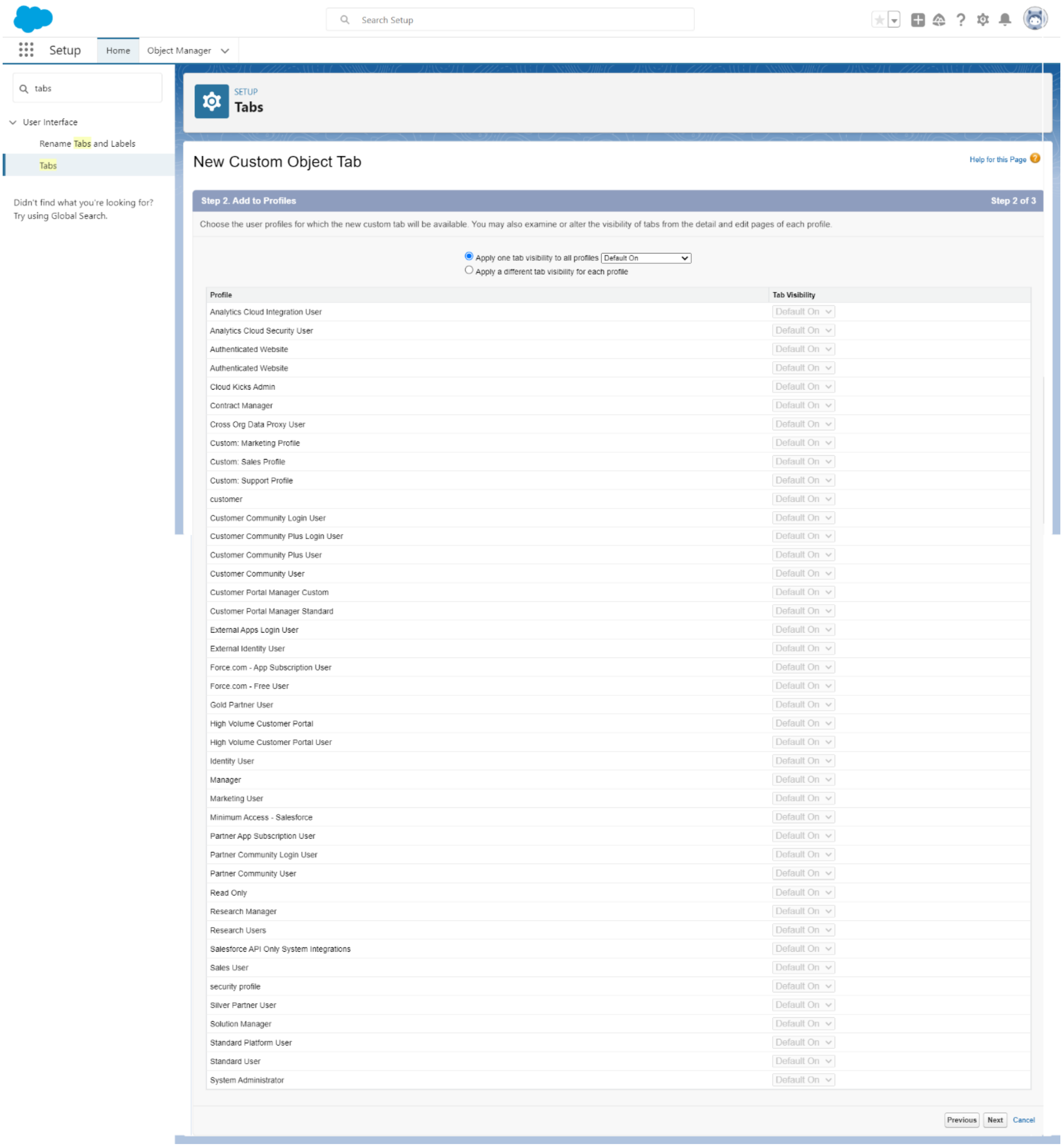


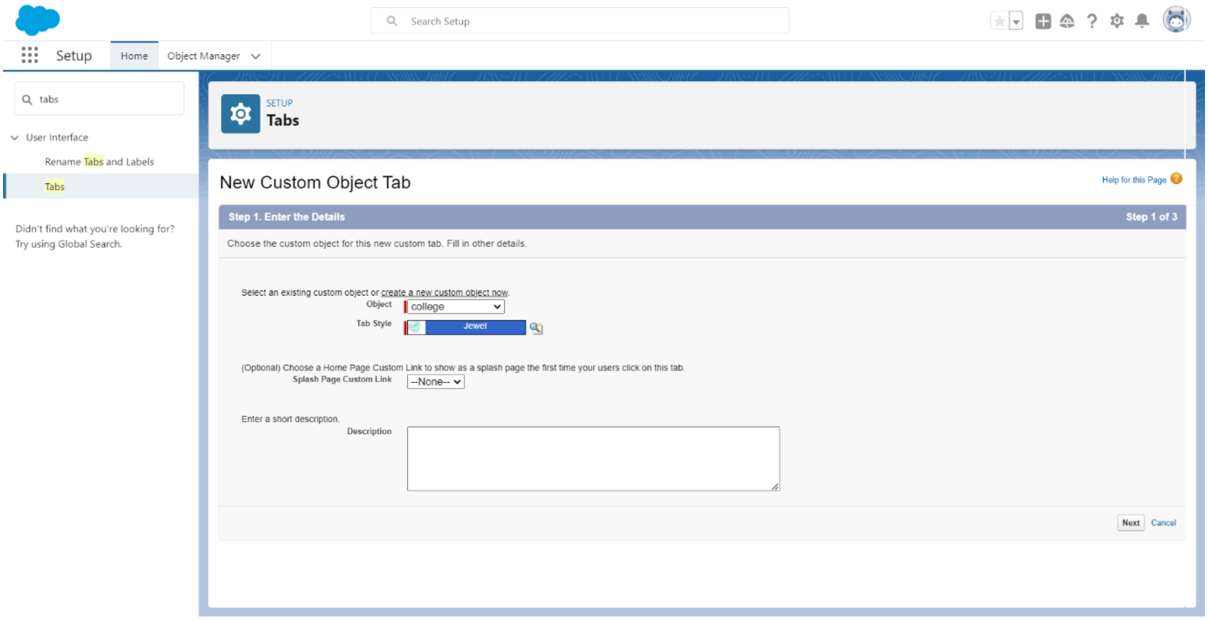
Step 4: Create a Lightning App

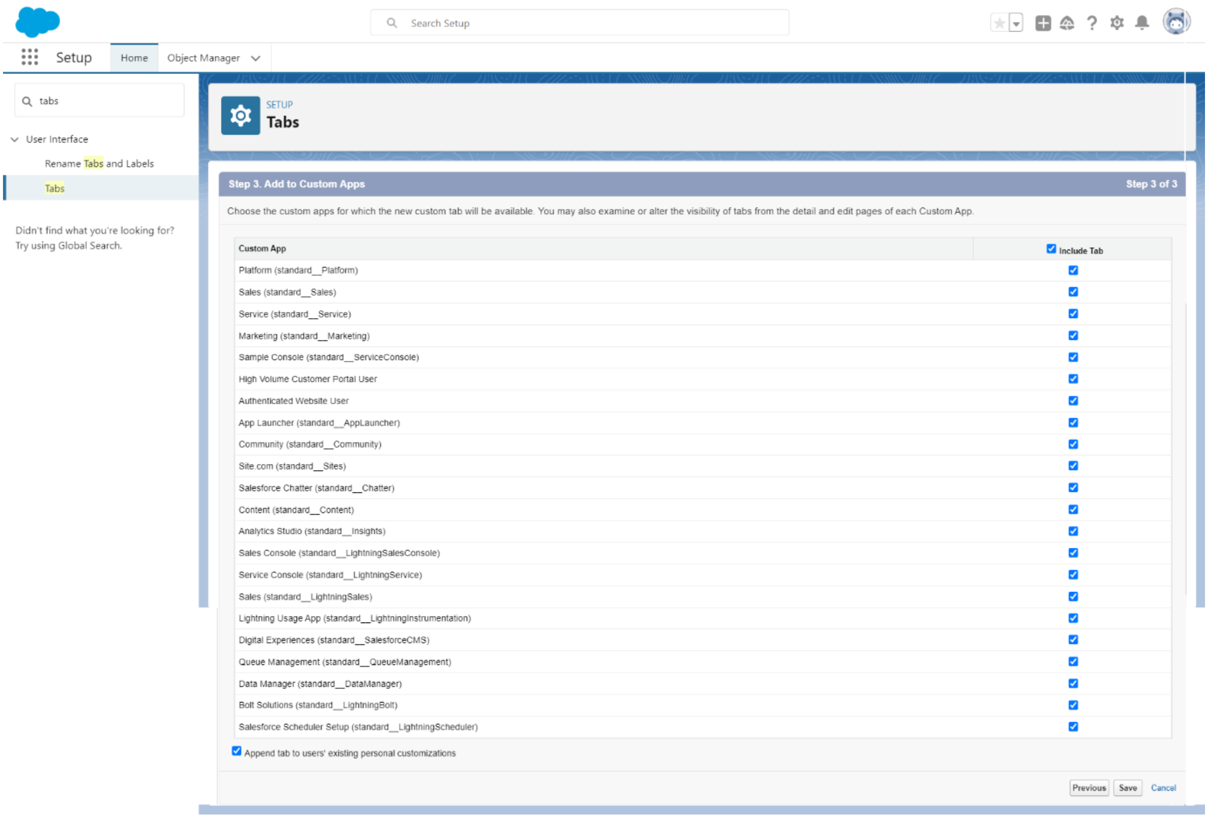
1. Type and select "App Manager."
2. Click "New Lightning App."
3. Fill in basic information (Name,

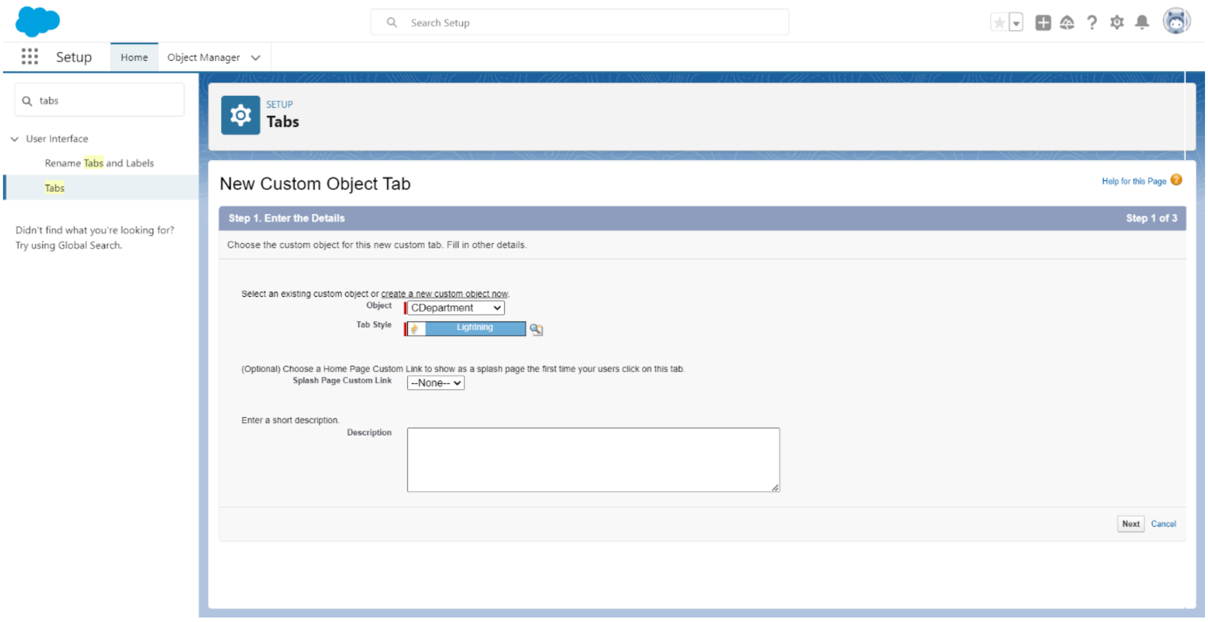
Developer Name, Description).

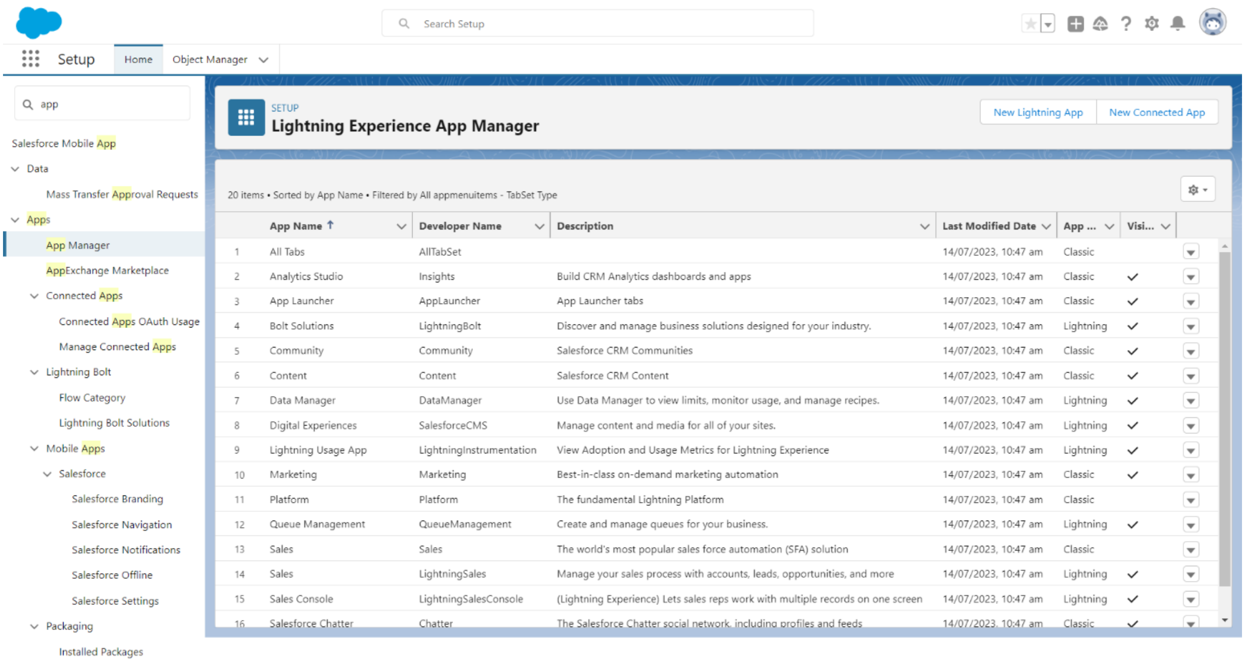
4. Choose the App Type (Standard, Console, Custom).
5. Customize the Logo and Colour Scheme.
6. Configure Navigation Items (objects to appear in the app's menu).
7. Set the App Visibility (default access).
8. Optionally, choose Record Pages (Lightning Record Pages).
9. Review and Save the app.
10. Assign the app to users or profiles.
11. Test the app with the assigned users.

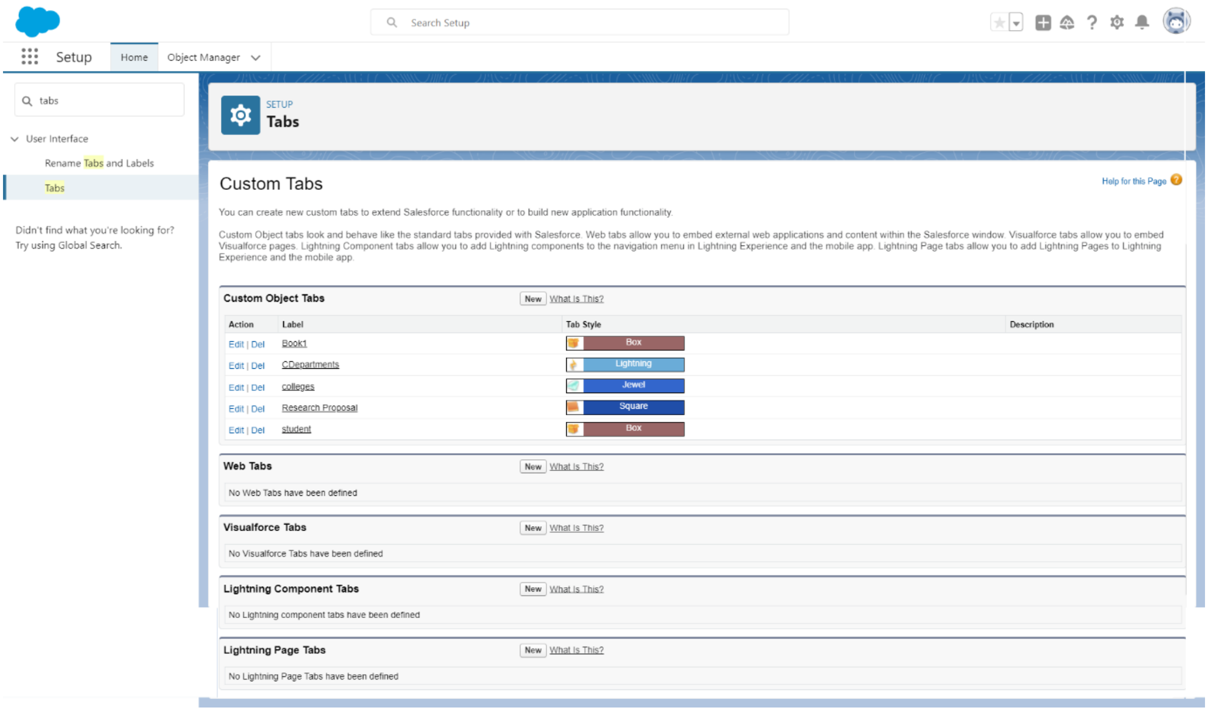

Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.
Apply one tab visibility to all profiles
Default On
Apply a different tab visibility for each profile
Profile
Tab Visibility
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Cloud Kicks Admin
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
customer
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Customer Portal Manager Custom
Customer Portal Manager Standard
External Apps Login User
External Identity User
Force.com - App Subscription User
Force.com - Free User
Gold Partner User
High Volume Customer Portal
High Volume Customer Portal User
Identity User
Manager
Marketing User
Minimum Access - Salesforce
Partner App Subscription User
Partner Community Login User
Partner Community User
Read Only
Research Manager
Research Users
Salesforce API Only System Integrations
Sales User
security profile
Silver Partner User
Solution Manager
Standard Platform User
Standard User
System Administrator
Previous
Next
Cancel


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


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


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


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


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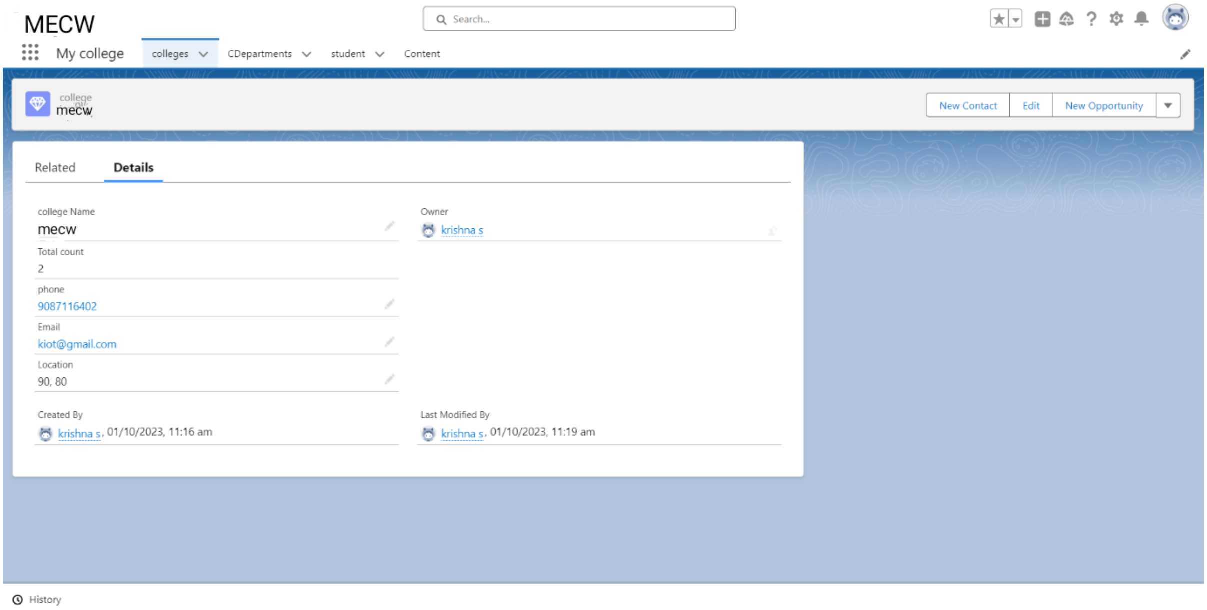
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
Book1
Box
Edit | Del
CDepartments
Lightning
Edit | Del
colleges
Jewel
Edit | Del
Research Proposal
Square
Edit | Del
student
Box
Web Tabs
New
What Is This?
No Web Tabs have been defined
Visualforce Tabs
New
What Is This?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

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.

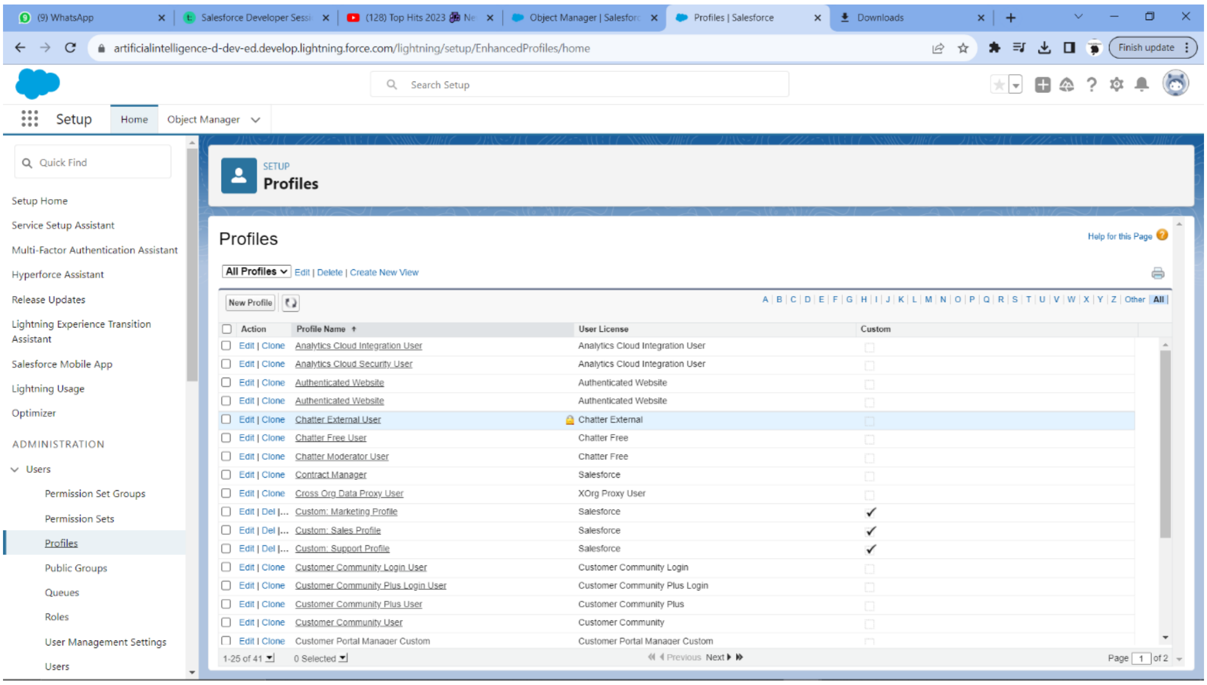
Remember to adjust field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your organization's requirements.

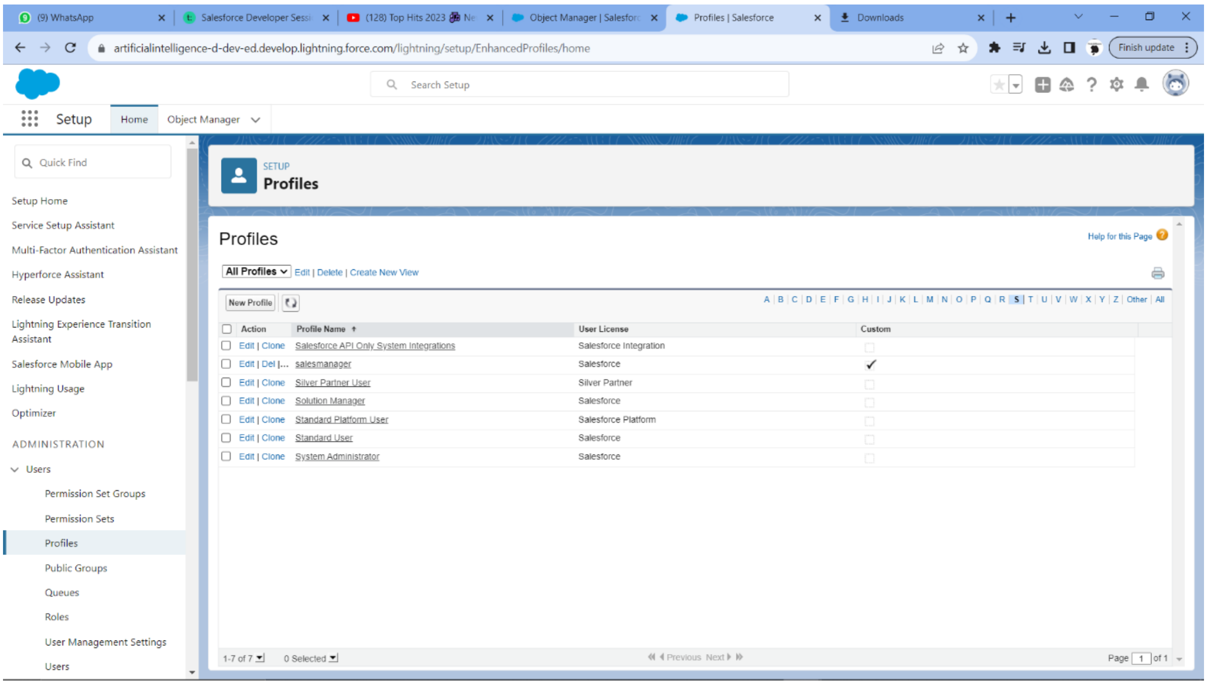

MECW
Search...
My college
colleges
CDepartments
student
Content
college
mecw
New Contact
Edit
New Opportunity
Related
Details
college Name
mecw
Owner
krishna s
Total count
2
phone
9087116402
Email
kiot@gmail.com
Location
90, 80
Created By
krishna s, 01/10/2023, 11:16 am
Last Modified By
krishna s, 01/10/2023, 11:19 am
History

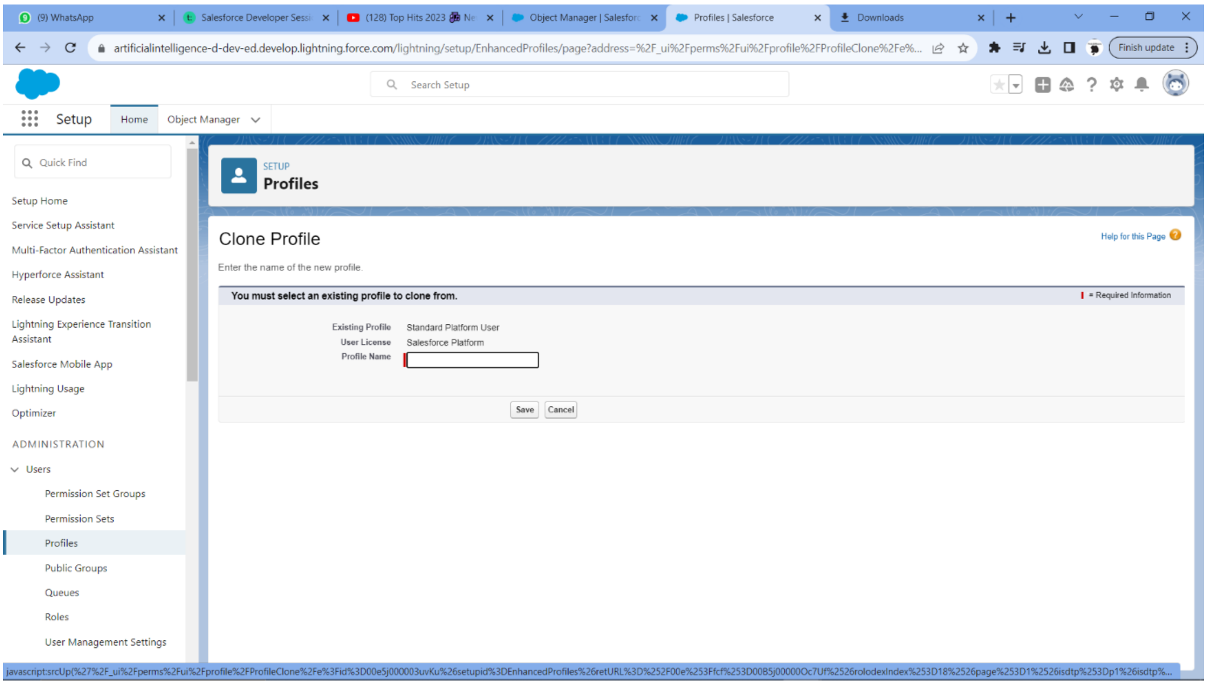
2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

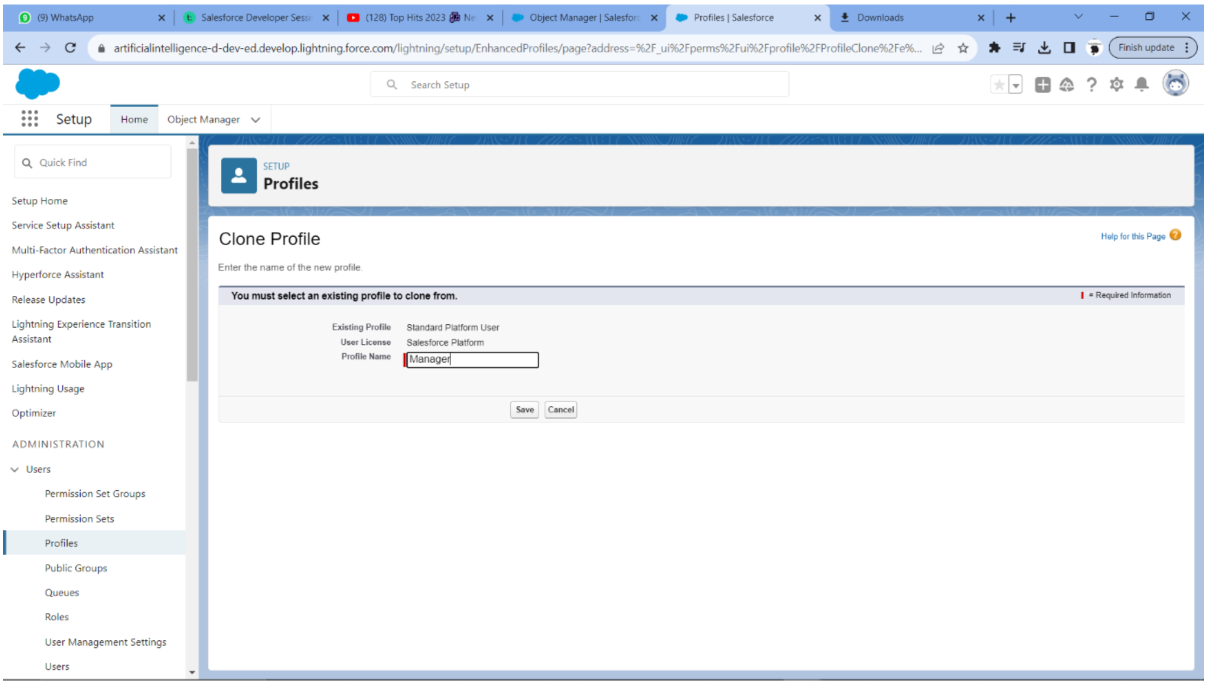
Solution:

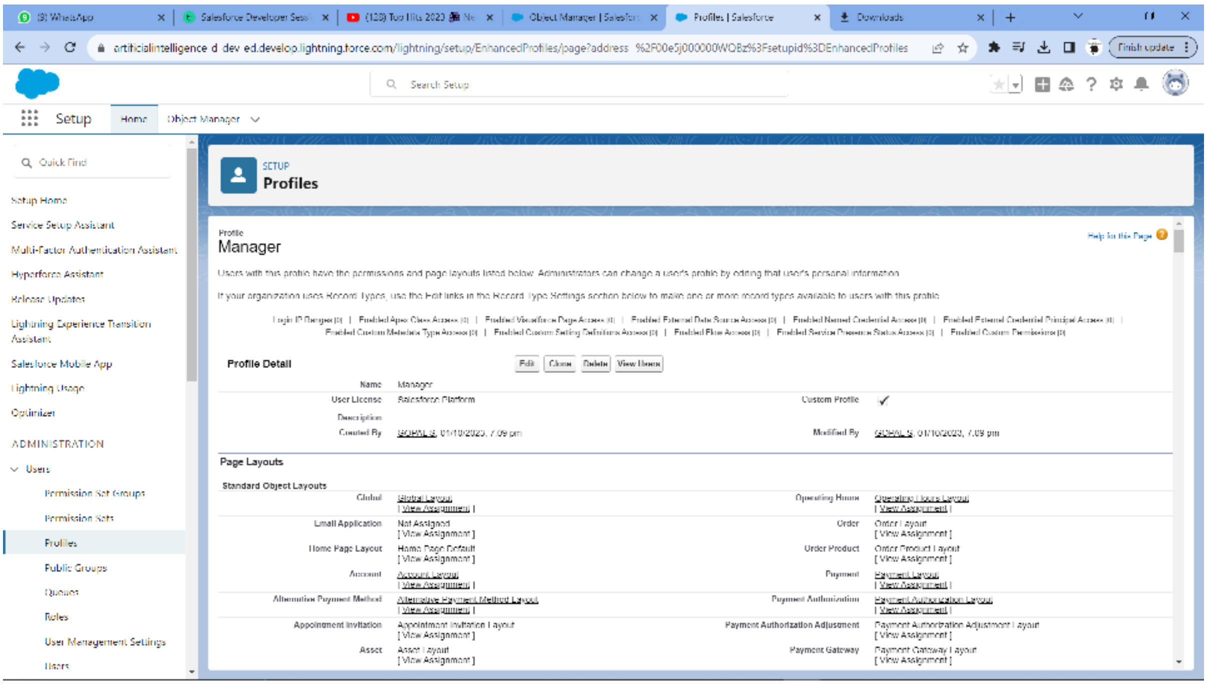
Step 1:Create two separate custom profiles, one for User A and one for User B.

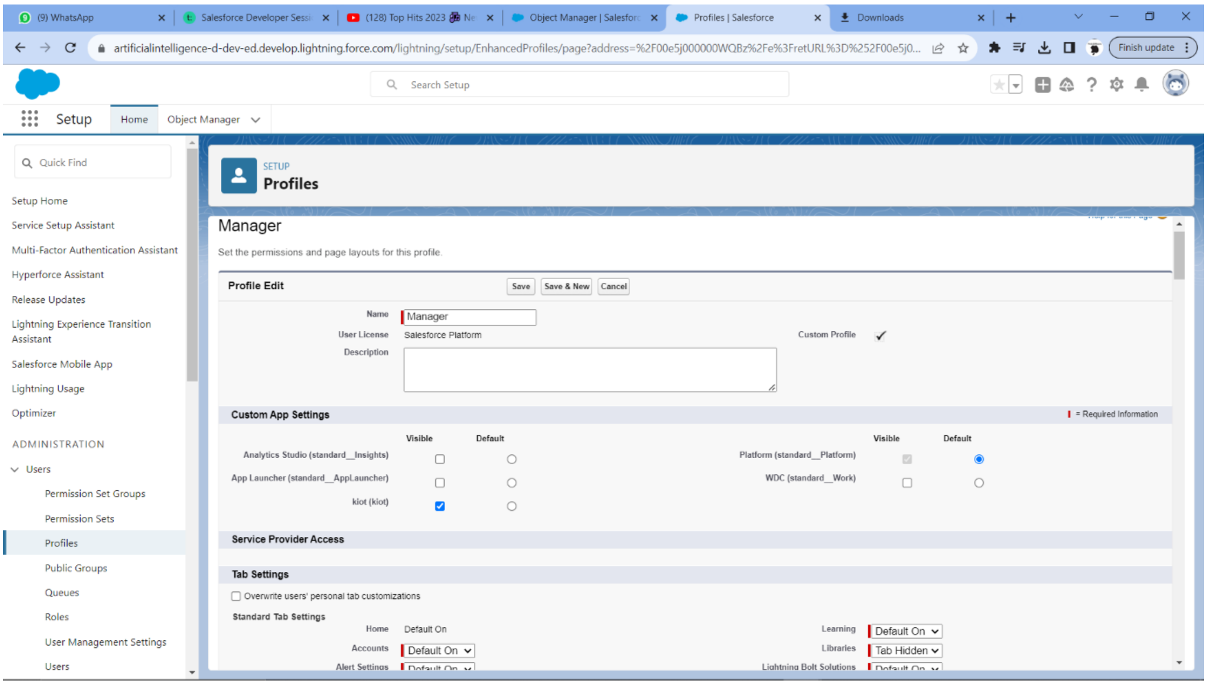


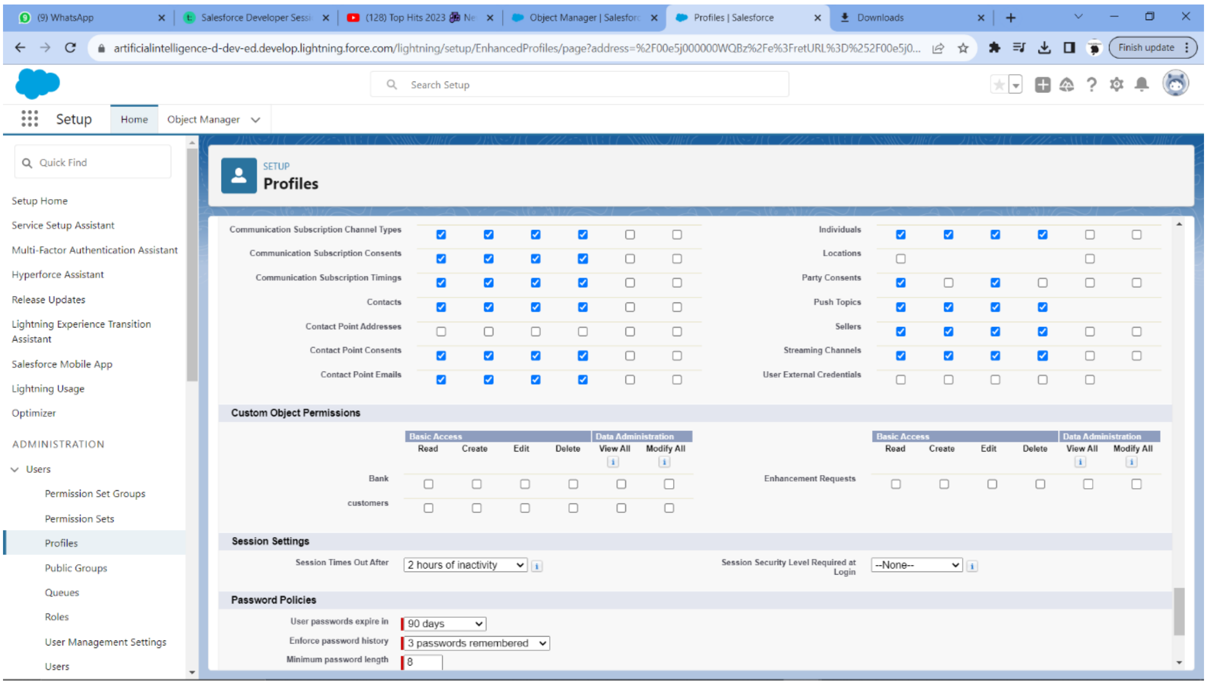

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home
Setup
Home
Object Manager
Search Setup
SETUP
Profiles
Profiles
All Profiles
Edit | Delete | Create New View
New Profile
Action
Profile Name
User License
Custom
Edit | Clone Salesforce API Only System Integrations Salesforce Integration
Edit | Del | ... salesmanager Salesforce ✓
Edit | Clone Silver Partner User Silver Partner
Edit | Clone Solution Manager Salesforce
Edit | Clone Standard Platform User Salesforce Platform
Edit | Clone Standard User Salesforce
Edit | Clone System Administrator Salesforce
1-7 of 7
0 Selected
Page 1 of 1
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users

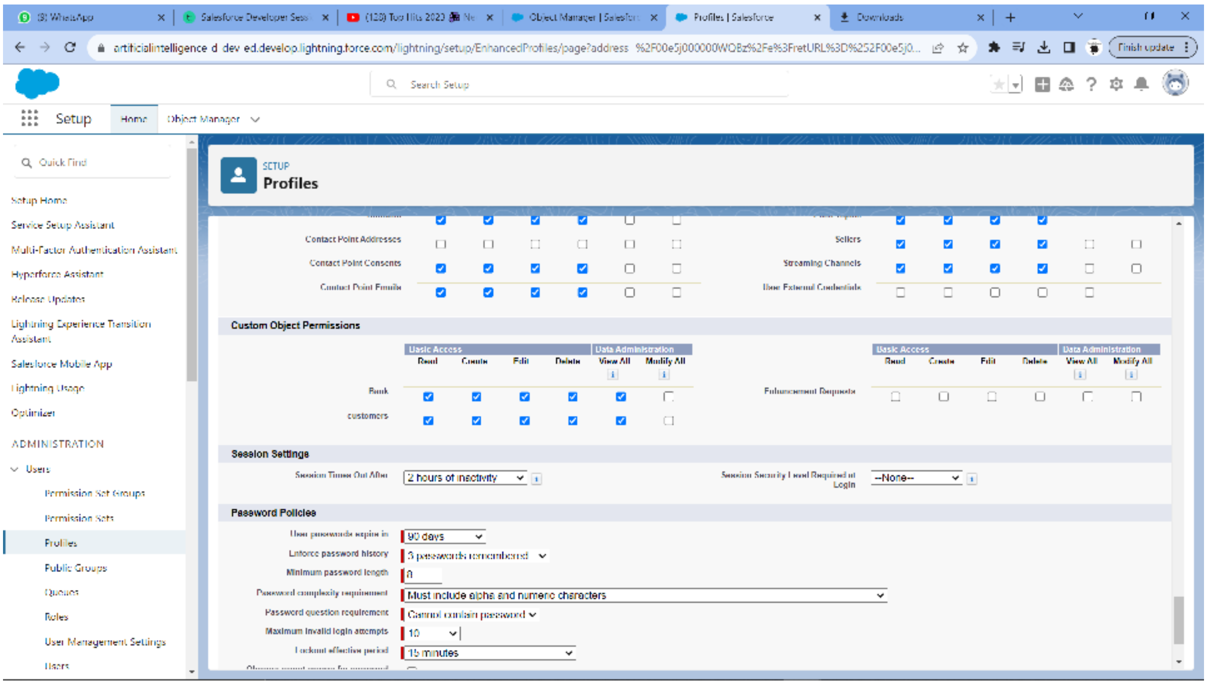

Setup
Home
Object Manager
Search Setup
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile Standard Platform User
User License Salesforce Platform
Profile Name
Save
Cancel

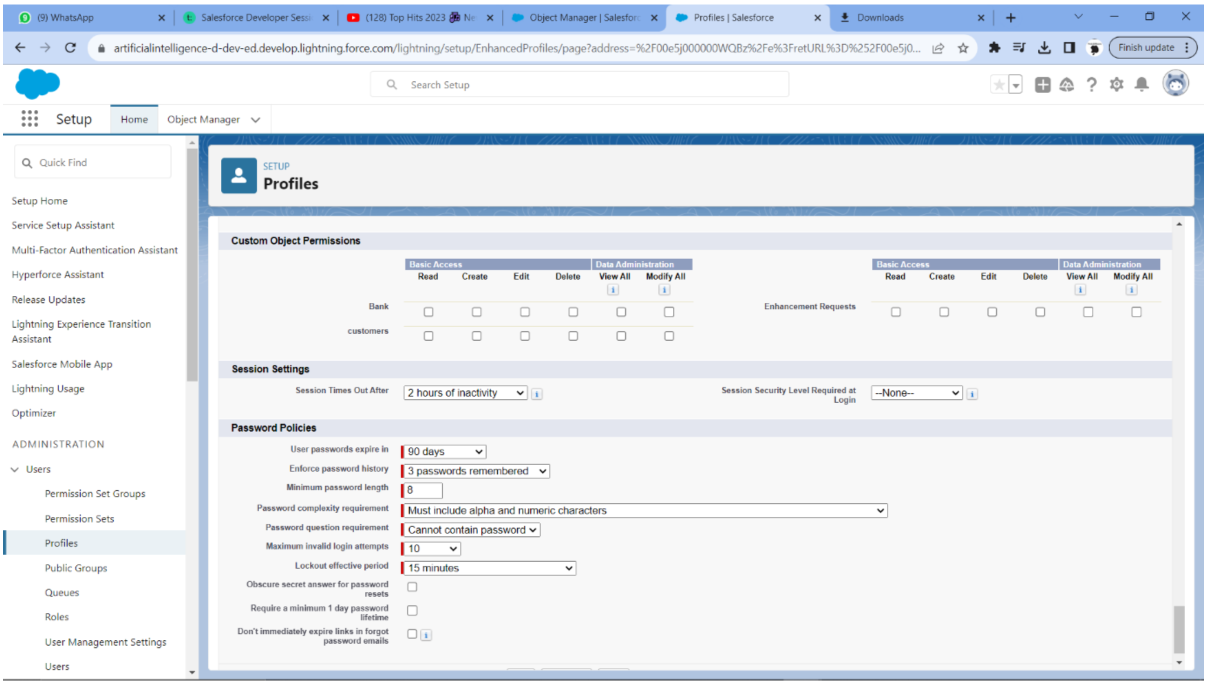

SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Standard Platform User
User License
Salesforce Platform
Profile Name
Manager
Save
Cancel

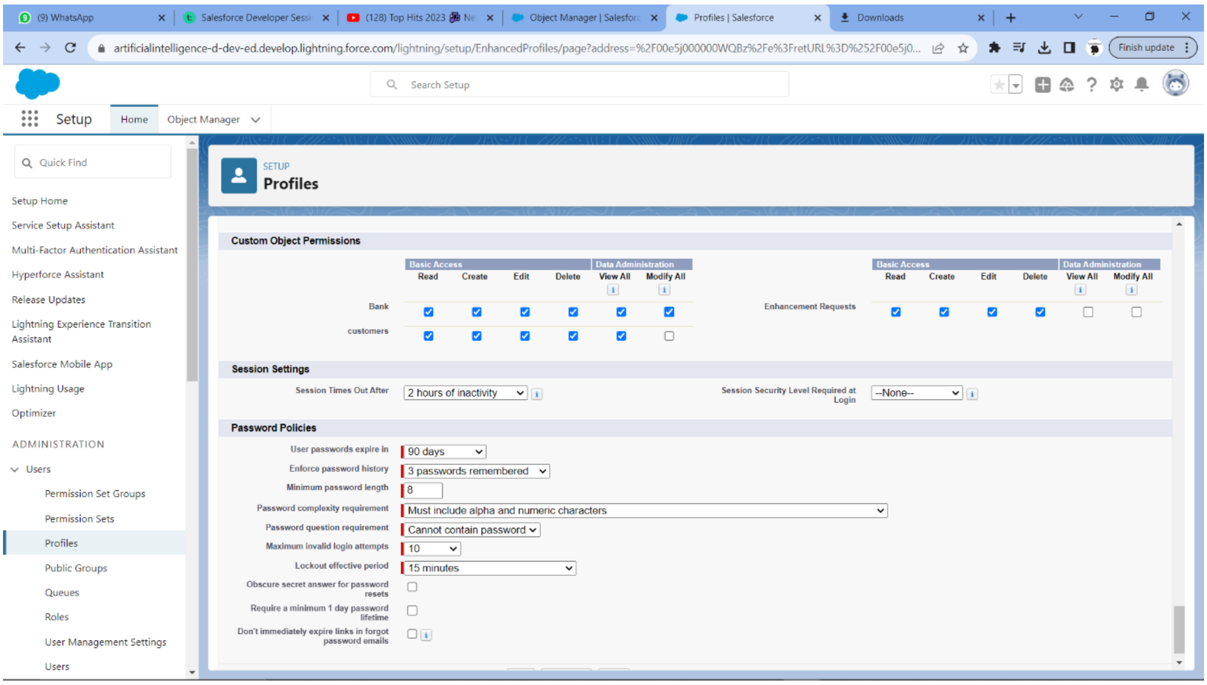

SETUP
Profiles
Profile
Manager
Profile Detail
Edit
Clone
Delete
View Users
Name
Manager
User License
Salesforce Platform
Custom Profile
Page Layouts
Standard Object Layouts


Setup
Home
Object Manager
Search Setup
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
SETUP
Profiles
Manager
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
Manager
User License
Salesforce Platform
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
kiot (kiot)
Platform (standard__Platform)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Home
Default On
Accounts
Default On
Learning
Default On
Libraries
Tab Hidden


SETUP
Profiles
Communication Subscription Channel Types
Communication Subscription Consents
Communication Subscription Timings
Contacts
Contact Point Addresses
Contact Point Consents
Contact Point Emails
Individuals
Locations
Party Consents
Push Topics
Sellers
Streaming Channels
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8


Profiles | Salesforce
SETUP
Profiles
Setup
Home
Object Manager
Quick Find
Custom Object Permissions
Session Settings
Session Times Out After
2 hours of inactivity
Password Policies
90 days
Must include alpha and numeric characters
15 minutes


Profiles | Salesforce
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2Fe%3FretURL%3D%252F00e5j0...
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
SETUP
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
Maximum invalid login attempts
10
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page
Setup
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read Create Edit Delete View All Modify All
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
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Password complexity requirement
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Cannot contain password
Maximum invalid login attempts
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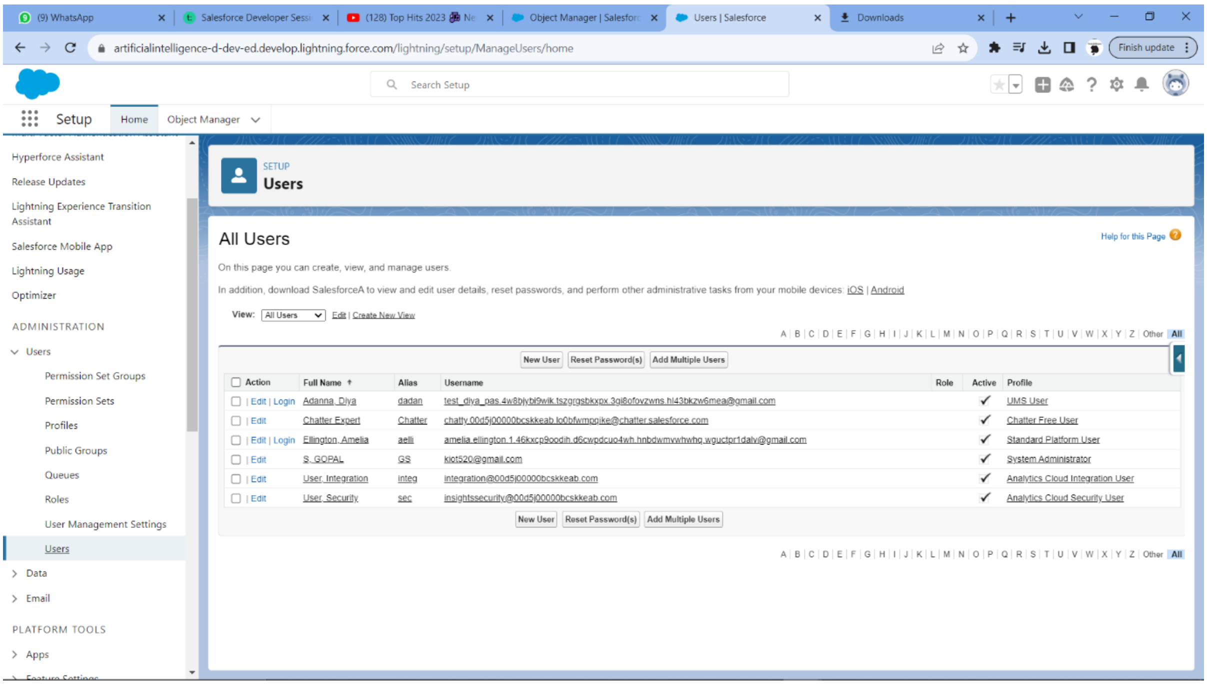
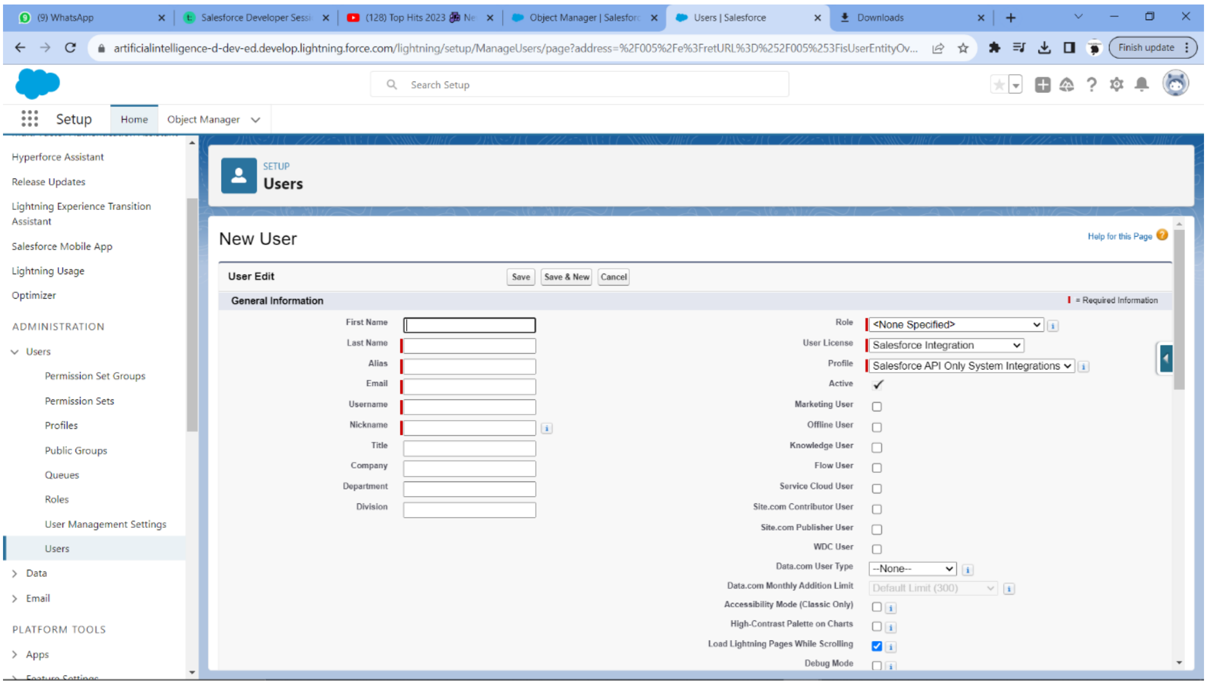
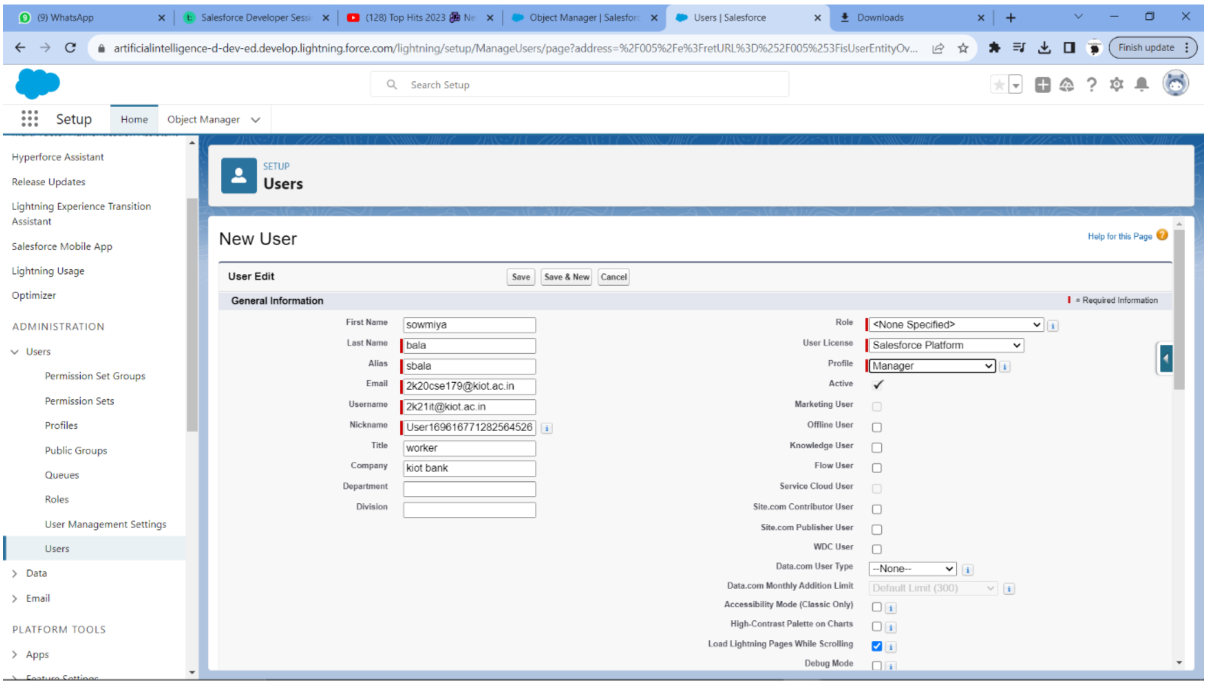
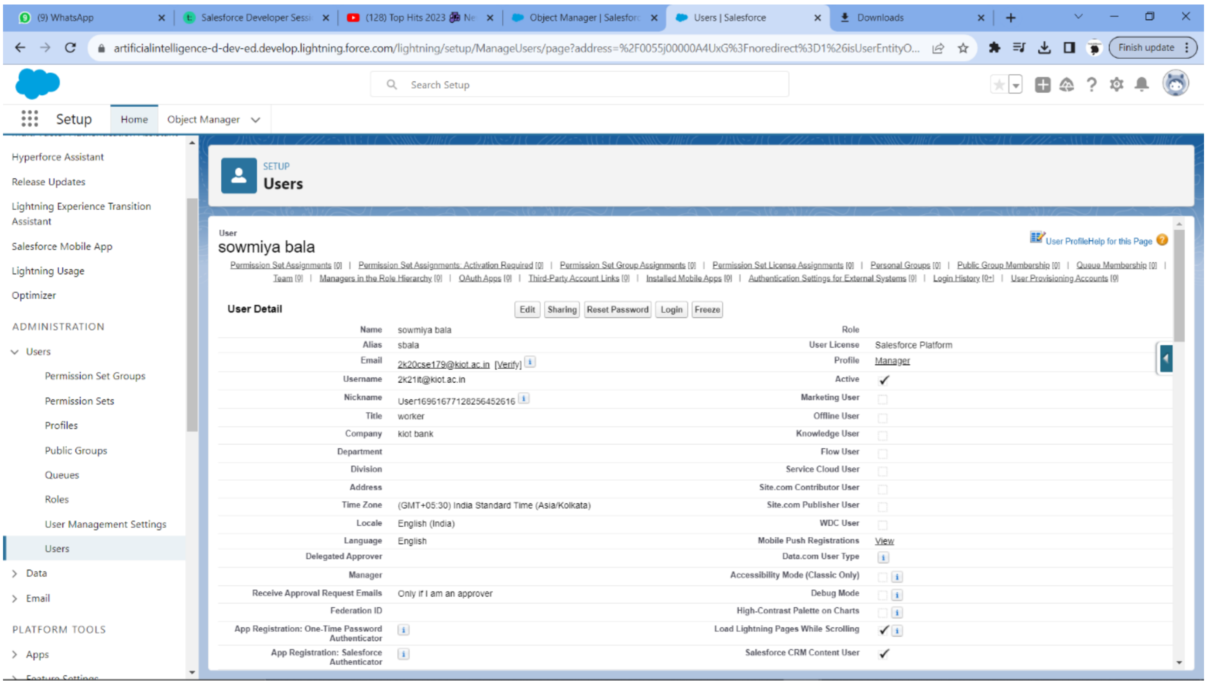
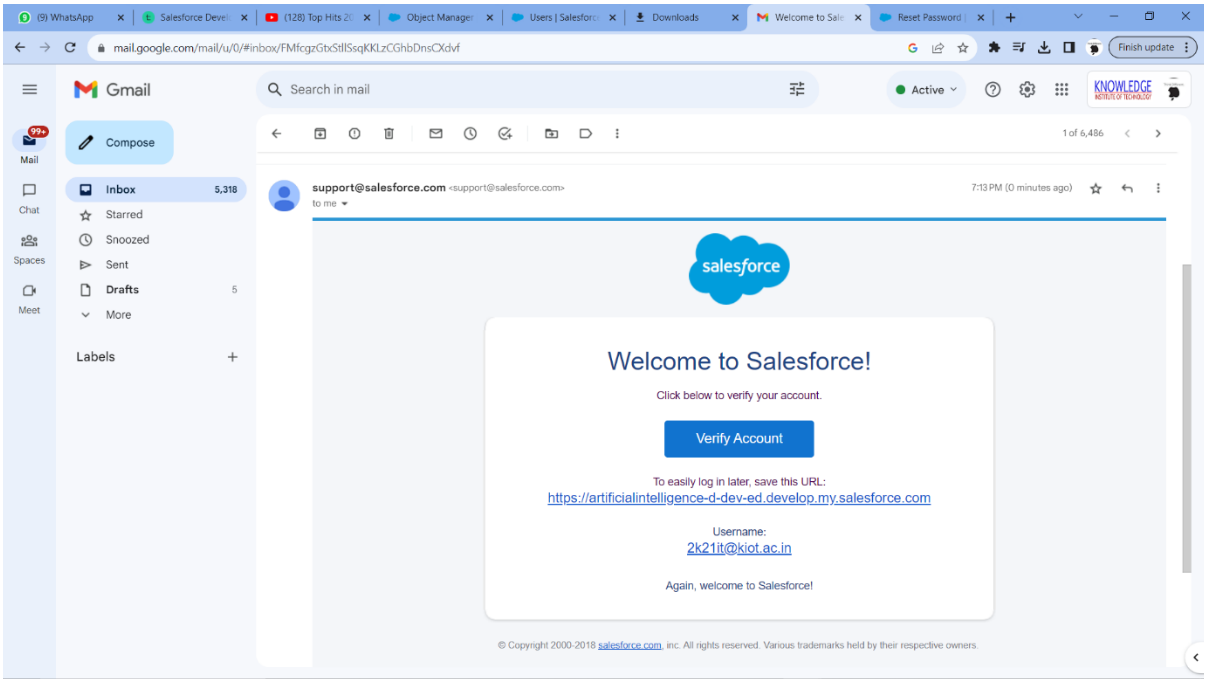
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails

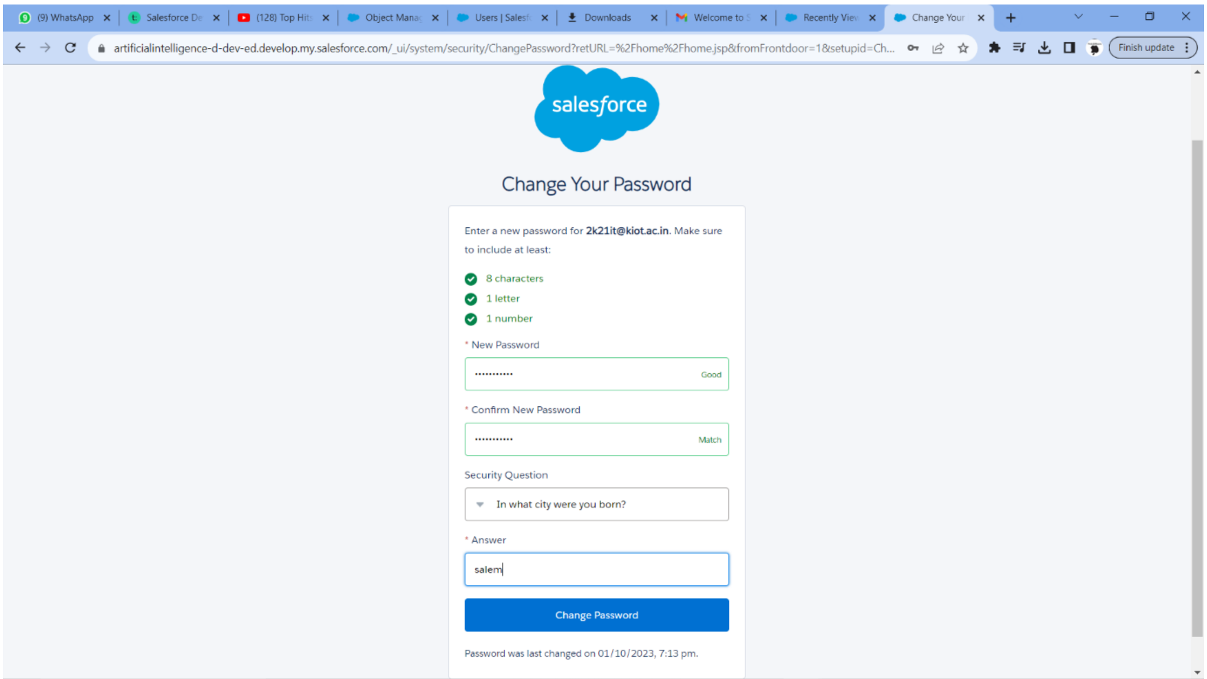

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
Setup
Users
All Users
On this page you can create, view, and manage users.
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android
View: All Users
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile
Adanna, Diya
Chatter Expert
Ellington, Amelia
S, GOPAL
User, Integration
User, Security
UMS User
Chatter Free User
Standard Platform User
System Administrator
Analytics Cloud Integration User
Analytics Cloud Security User

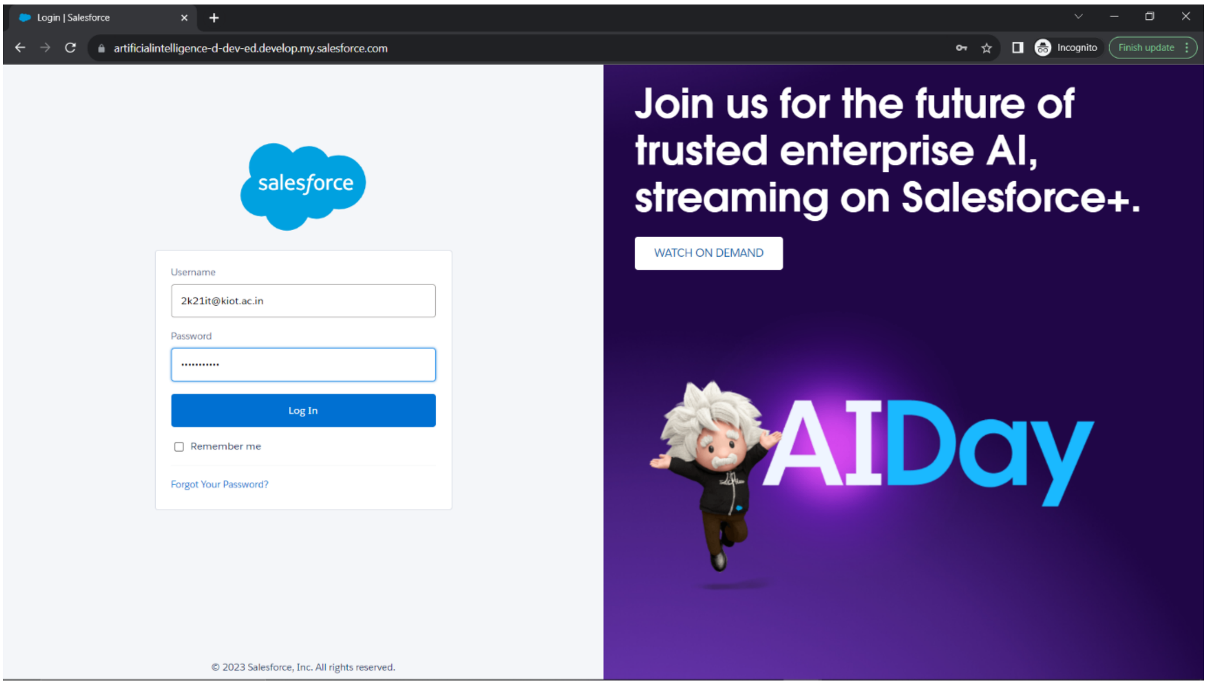

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv...
Search Setup
Setup
Home
Object Manager
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Apps
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division
Role
<None Specified>
User License
Salesforce Integration
Profile
Salesforce API Only System Integrations
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Default Limit (300)
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode

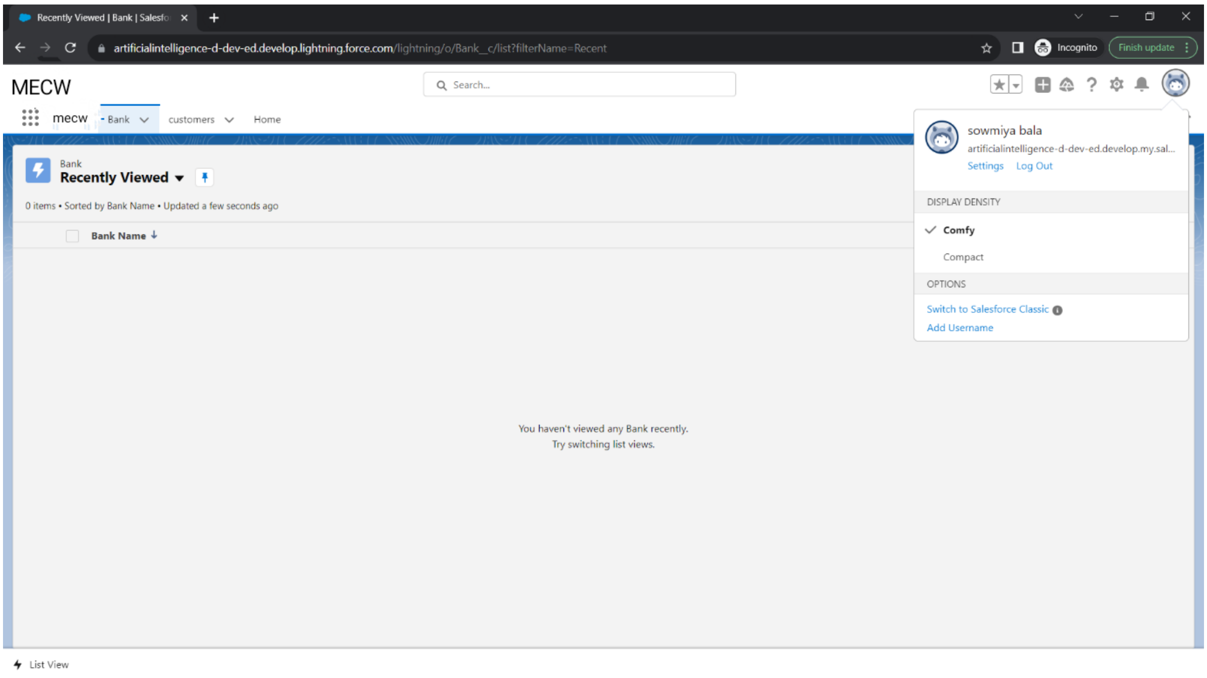

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv...
Search Setup
Setup
Home
Object Manager
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
sowmiya
Last Name
bala
Alias
sbala
Email
2k20cse179@kiot.ac.in
Username
2k21it@kiot.ac.in
Nickname
User16961677128256452
Title
worker
Company
kiot bank
Department
Division
Role
<None Specified>
User License
Salesforce Platform
Profile
Manager
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Default Limit (300)
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode

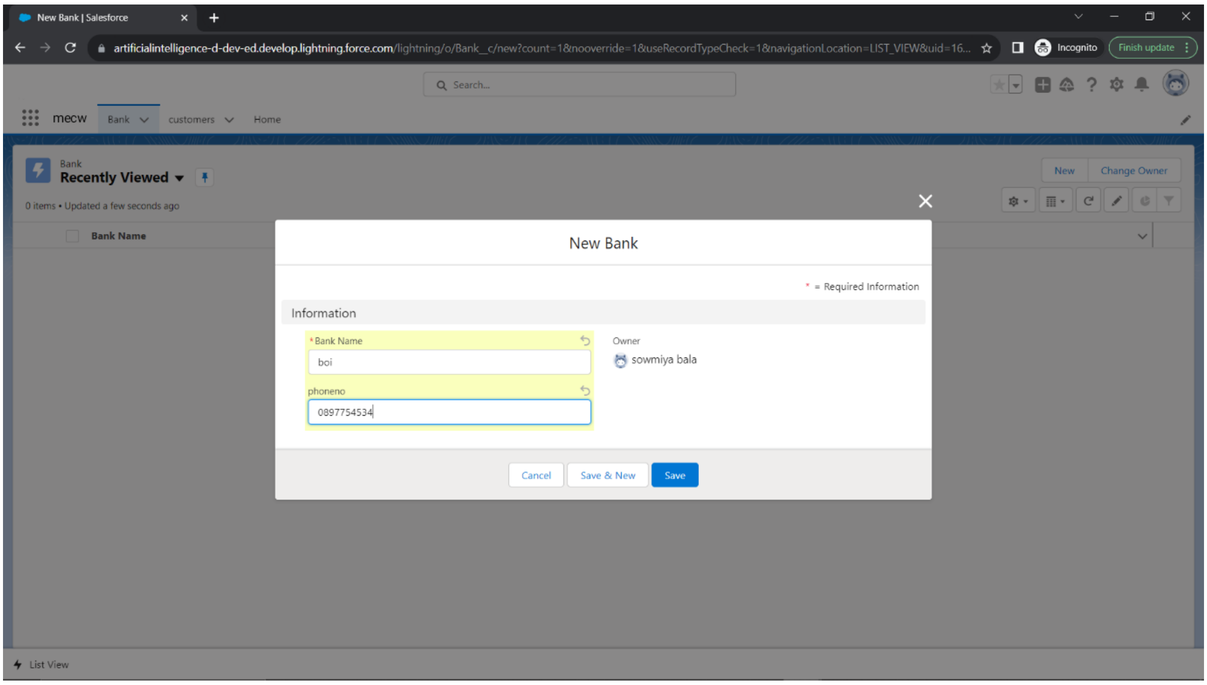

Setup
Home
Object Manager
Search Setup
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Apps
SETUP
Users
User
sowmiya bala
User Detail
Edit
Sharing
Reset Password
Login
Freeze
Name sowmiya bala
Alias sbala
Email 2k20cse179@kiot.ac.in [Verify]
Username 2k21it@kiot.ac.in
Nickname User16961677128256452616
Title worker
Company kiot bank
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Receive Approval Request Emails Only if I am an approver
User License Salesforce Platform
Profile Manager
Active

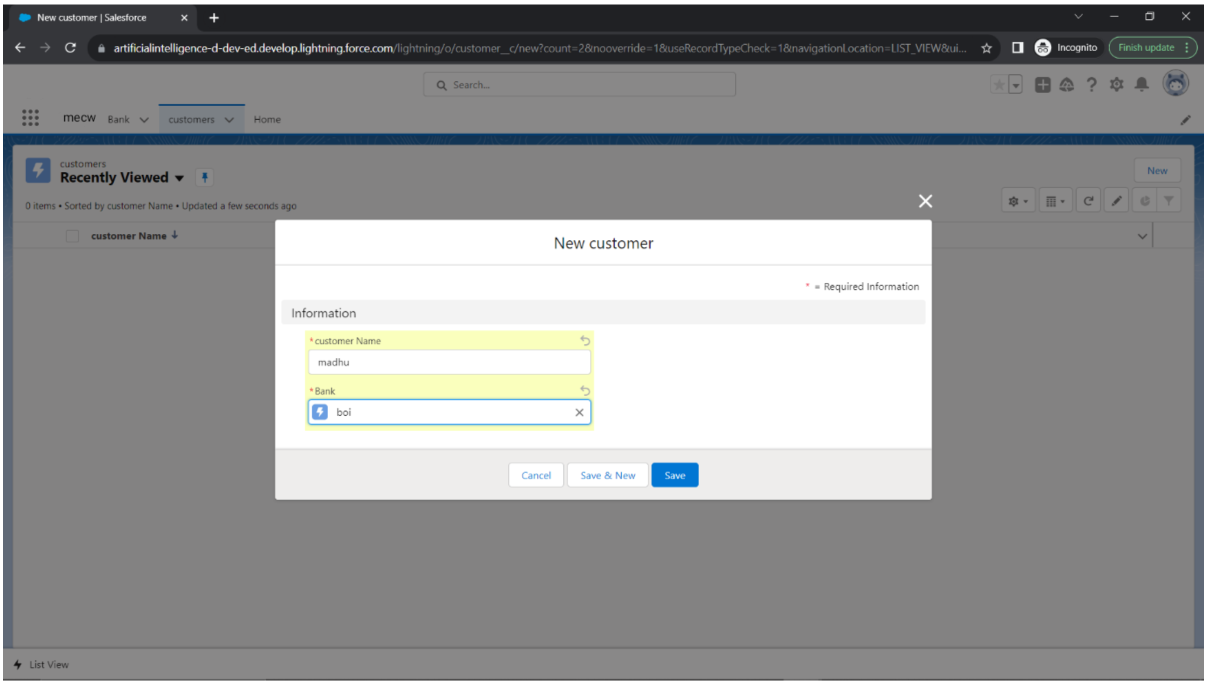

mail.google.com/mail/u/0/#inbox/FMfcgzGtxStllSsqKKLzCGhbDnsCXdvf
Gmail
Search in mail
Compose
Inbox 5,318
Starred
Snoozed
Sent
Drafts
More
Labels
1 of 6,486
support@salesforce.com <support@salesforce.com>
to me
7:13 PM (0 minutes ago)
salesforce
Welcome to Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://artificialintelligence-d-dev-ed.develop.my.salesforce.com
Username:
2k21it@kiot.ac.in
Again, welcome to Salesforce!
© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.

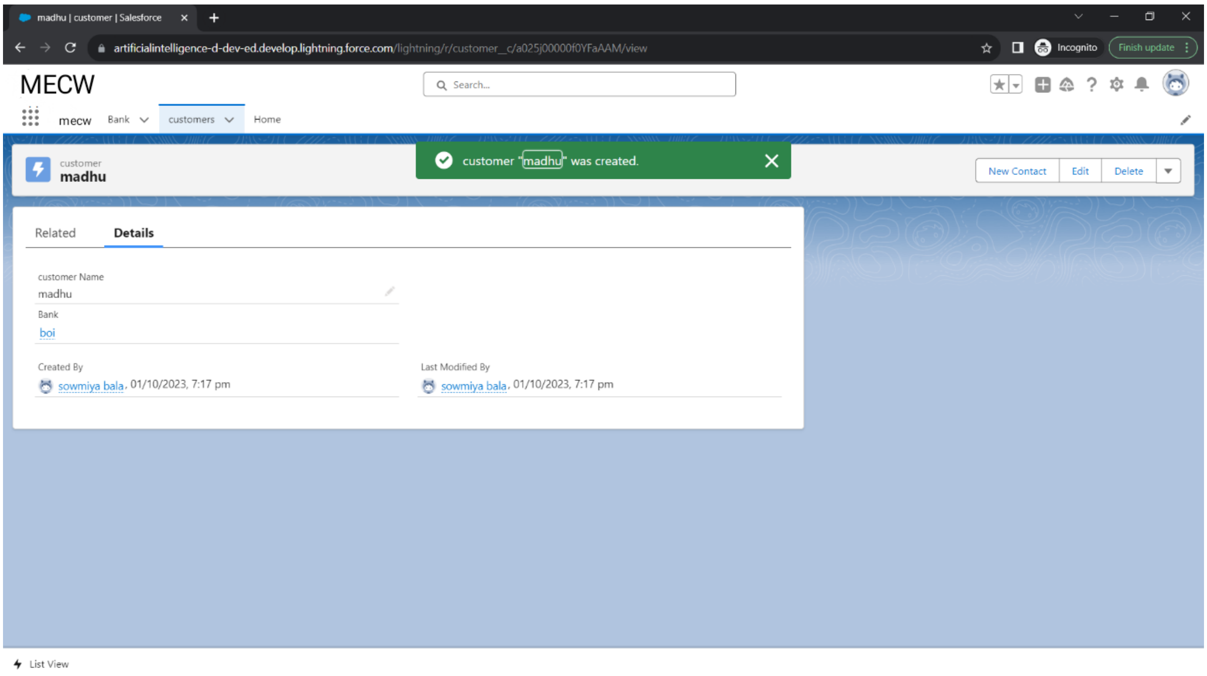

salesforce
Change Your Password
Enter a new password for 2k21it@kiot.ac.in. Make sure to include at least:
8 characters
1 letter
1 number
* New Password
Good
* Confirm New Password
Match
Security Question
In what city were you born?
* Answer
salem
Change Password
Password was last changed on 01/10/2023, 7:13 pm.

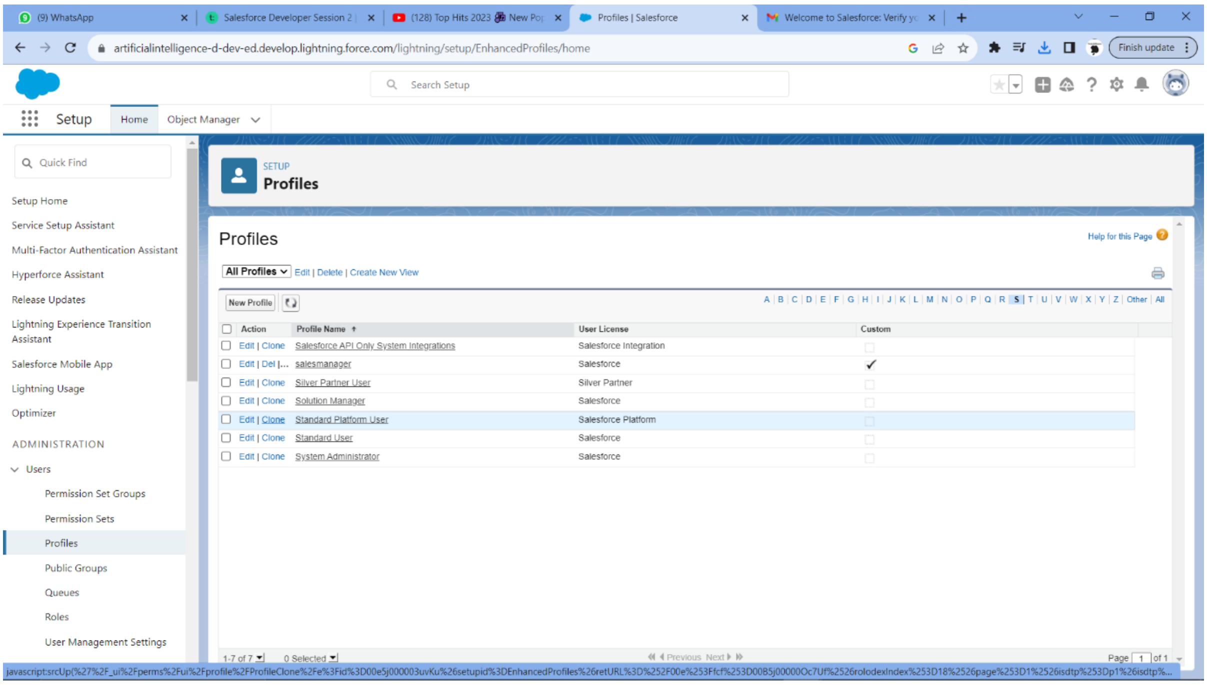

Login | Salesforce
artificialintelligence-d-dev-ed.develop.my.salesforce.com
salesforce
Username
2k21it@kiot.ac.in
Password
Log In
Remember me
Forgot Your Password?
© 2023 Salesforce, Inc. All rights reserved.
Join us for the future of trusted enterprise AI, streaming on Salesforce+.
WATCH ON DEMAND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

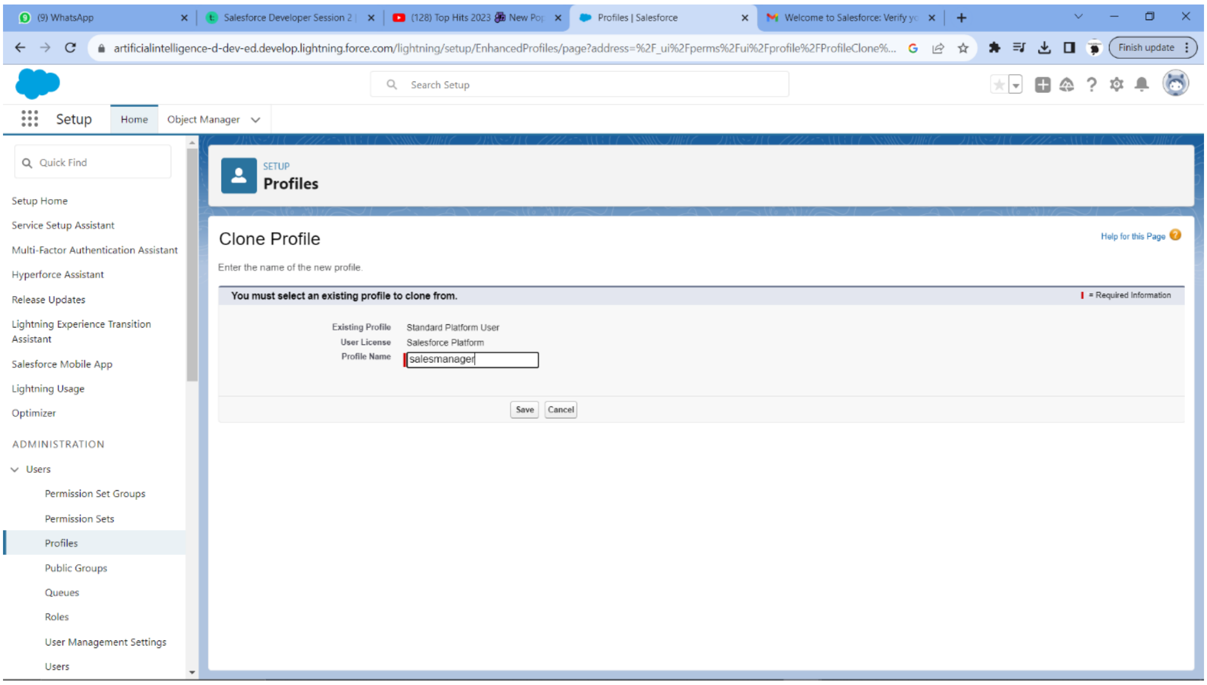

Recently Viewed | Bank | Salesfo
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/list?filterName=Recent
Incognito
Finish update
MECW
Search...
mecw
Bank
customers
Home
sowmiya bala
artificialintelligence-d-dev-ed.develop.my.sal...
Settings
Log Out
DISPLAY DENSITY
Comfy
Compact
OPTIONS
Switch to Salesforce Classic
Add Username
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.
List View

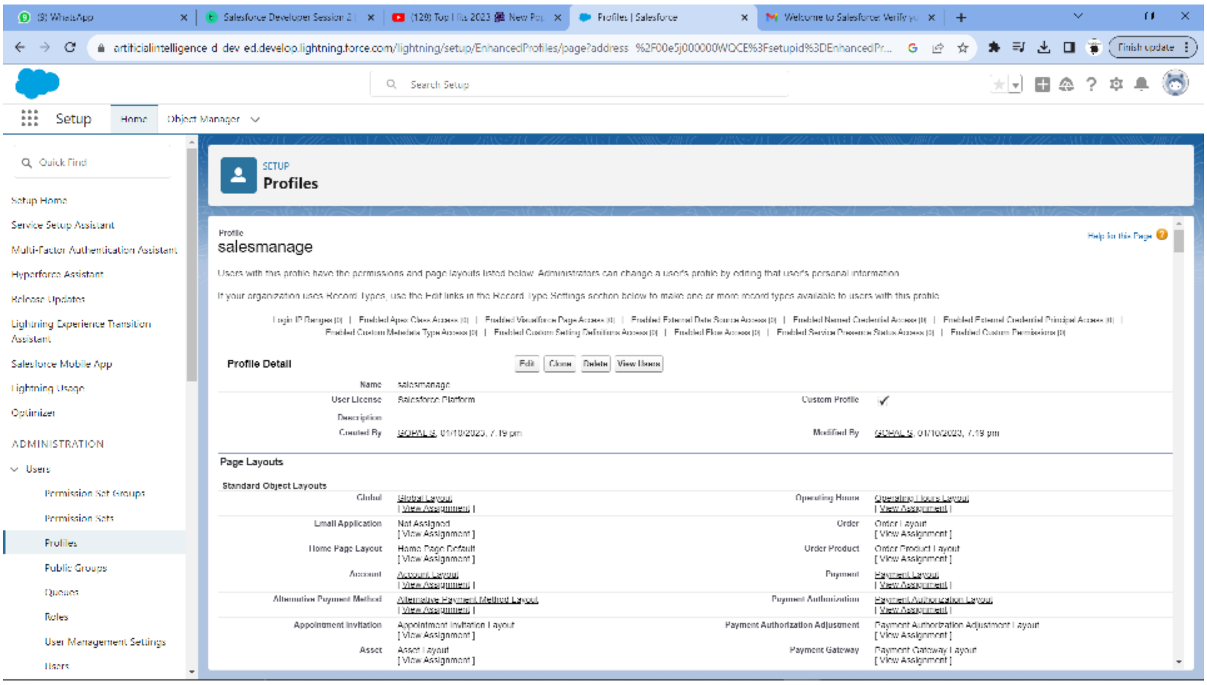

New Bank | Salesforce
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=16...
Incognito
Finish update
Search...
mecw
Bank
customers
Home
Bank
Recently Viewed
0 items • Updated a few seconds ago
Bank Name
New
Change Owner
New Bank
* = Required Information
Information
* Bank Name
boi
Owner
sowmiya bala
phoneno
0897754534
Cancel
Save & New
Save
List View

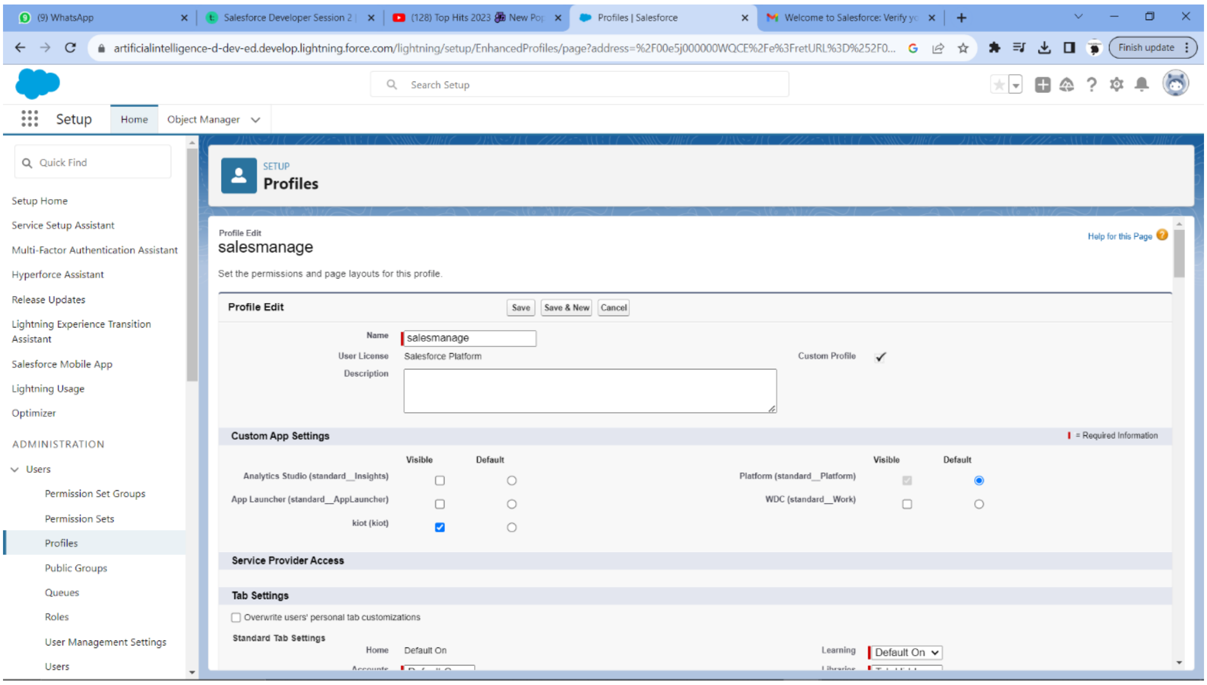

New customer | Salesforce
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer__c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&ui...
Incognito
Finish update
Search...
mecw
Bank
customers
Home
customers
Recently Viewed
0 items • Sorted by customer Name • Updated a few seconds ago
New
customer Name
New customer
* = Required Information
Information
* customer Name
madhu
* Bank
boi
Cancel
Save & New
Save
List View

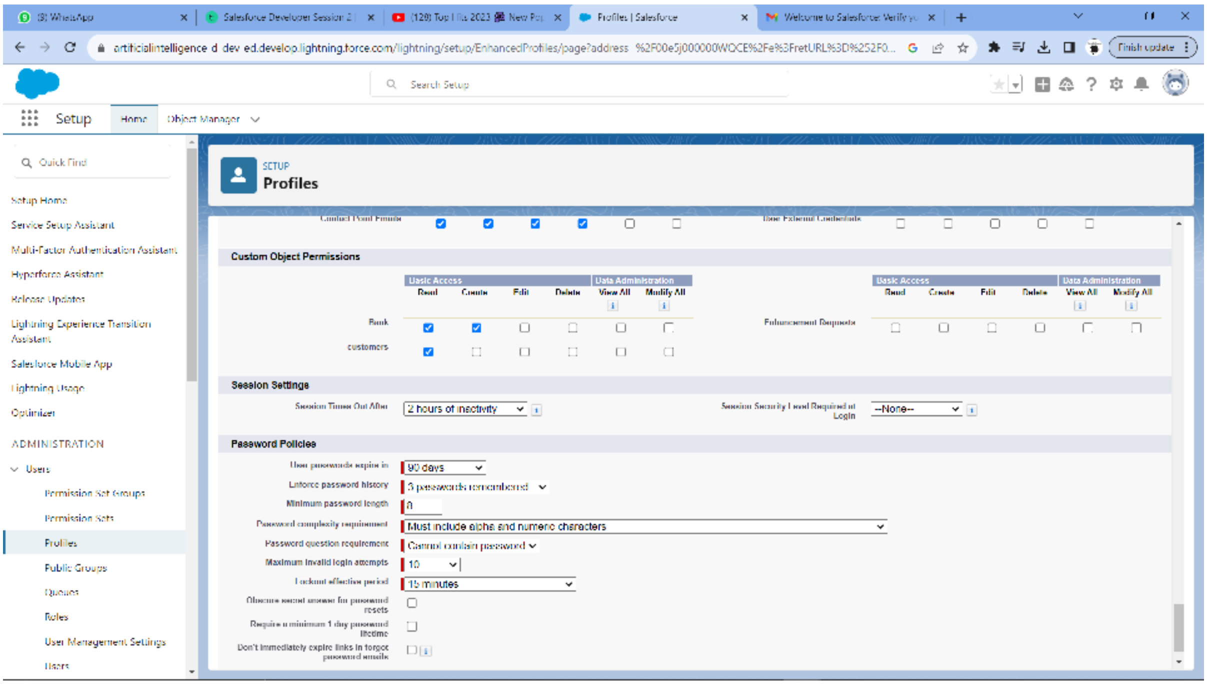

madhu | customer | Salesforce
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/r/customer__c/a025j00000f0YFaAAM/view
Incognito
Finish update
MECW
Search...
mecw
Bank
customers
Home
customer
madhu
customer "madhu" was created.
New Contact
Edit
Delete
Related
Details
customer Name
madhu
Bank
boi
Created By
sowmiya bala, 01/10/2023, 7:17 pm
Last Modified By
sowmiya bala, 01/10/2023, 7:17 pm
List View

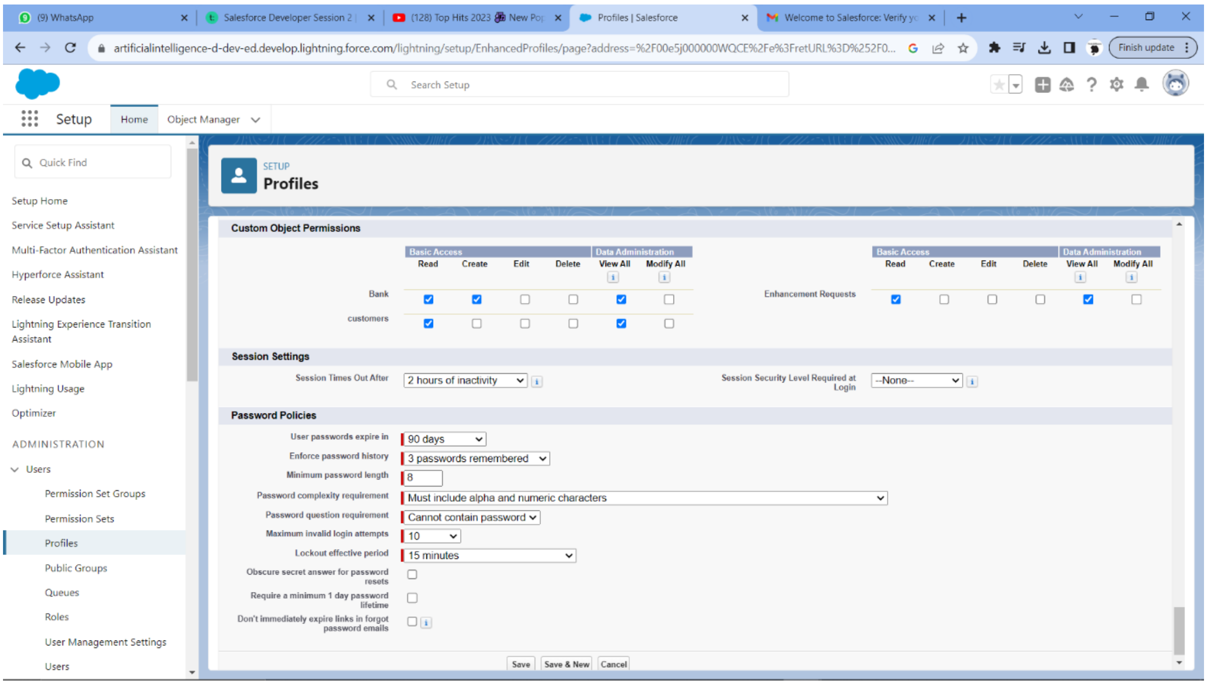

(9) WhatsApp
Salesforce Developer Session 2
(128) Top Hits 2023 New Pop
Profiles | Salesforce
Welcome to Salesforce: Verify yo
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home
Finish update
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
SETUP
Profiles
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action
Profile Name
User License
Custom
Edit | Clone Salesforce API Only System Integrations Salesforce Integration
Edit | Del | ... salesmanager Salesforce
Edit | Clone Silver Partner User Silver Partner
Edit | Clone Solution Manager Salesforce
Edit | Clone Standard Platform User Salesforce Platform
Edit | Clone Standard User Salesforce
Edit | Clone System Administrator Salesforce
1-7 of 7
0 Selected
Previous Next
Page 1 of 1


(9) WhatsApp
Salesforce Developer Session 2
(128) Top Hits 2023 New Pop
Profiles | Salesforce
Welcome to Salesforce: Verify yo
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%...
Finish update
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile Standard Platform User
User License Salesforce Platform
Profile Name salesmanager
Save
Cancel


Setup
Home
Object Manager
Search Setup
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
SETUP
Profiles
Profile
salesmanage
Help for this Page
Profile Detail
Edit
Clone
Delete
View Users
Name salesmanage
User License Salesforce Platform
Custom Profile
Description
Created By
Modified By
Page Layouts
Standard Object Layouts
Global Global Layout
Operating Hours Operating Hours Layout
Email Application Not Assigned
Order Order Layout
Home Page Layout Home Page Default
Order Product Order Product Layout
Account Account Layout
Payment Payment Layout
Alternative Payment Method Alternative Payment Method Layout
Payment Authorization Payment Authorization Layout
Appointment Invitation Appointment Invitation Layout
Payment Authorization Adjustment Payment Authorization Adjustment Layout
Asset Asset Layout
Payment Gateway Payment Gateway Layout
[View Assignment]


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%2Fe%3FretURL%3D%252F0...
Setup
Home
Object Manager
Search Setup
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
SETUP
Profiles
Profile Edit
salesmanage
Help for this Page
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name salesmanage
User License Salesforce Platform
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
kiot (kiot)
Platform (standard__Platform)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Home Default On
Learning Default On


SETUP
Profiles
Custom Object Permissions
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Password Policies
90 days
Must include alpha and numeric characters
15 minutes


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%2Fe%3FretURL%3D%252F0...
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
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Users
SETUP
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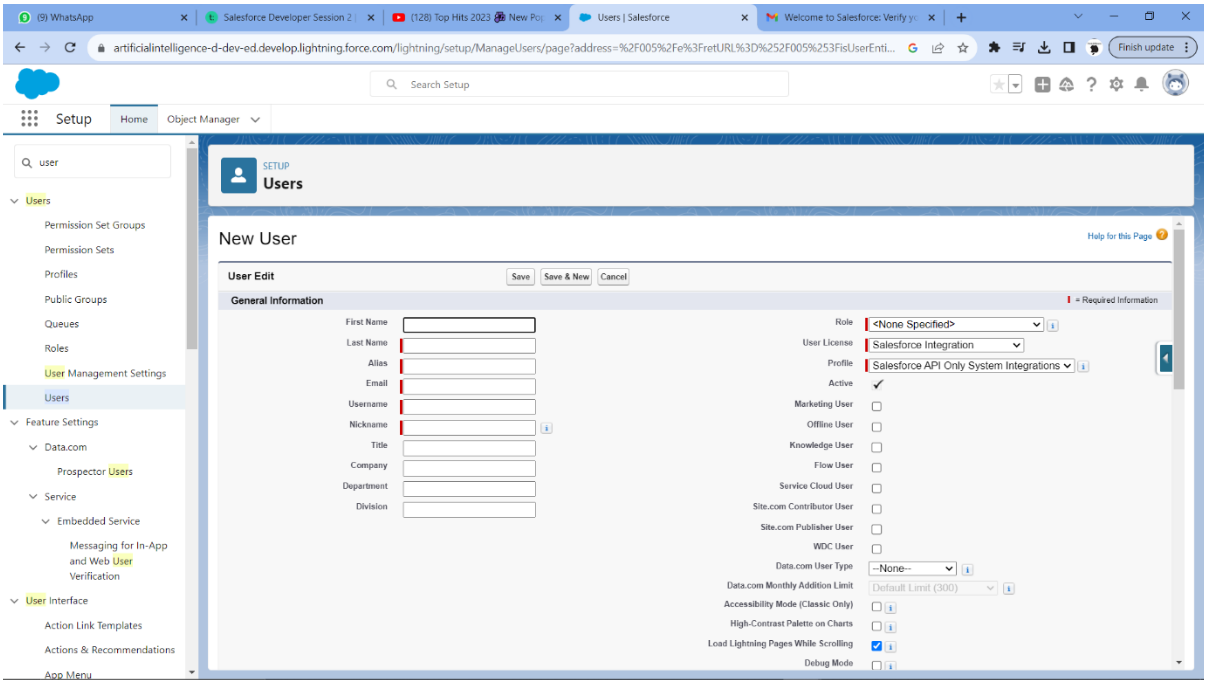
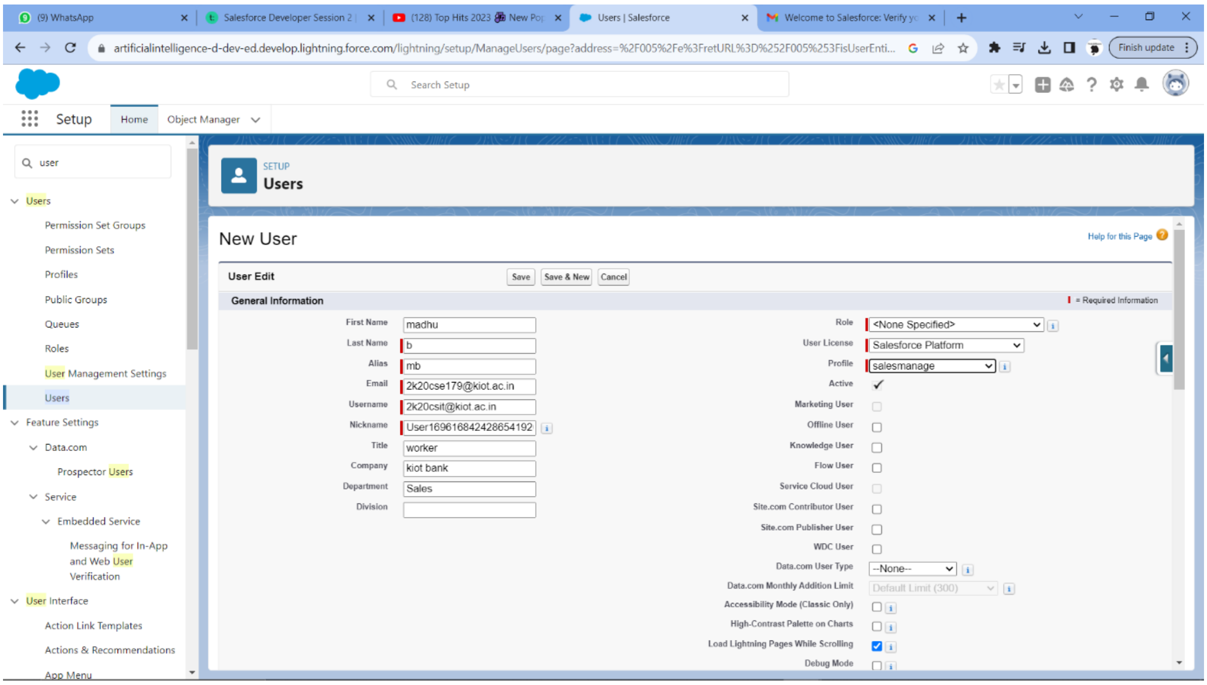
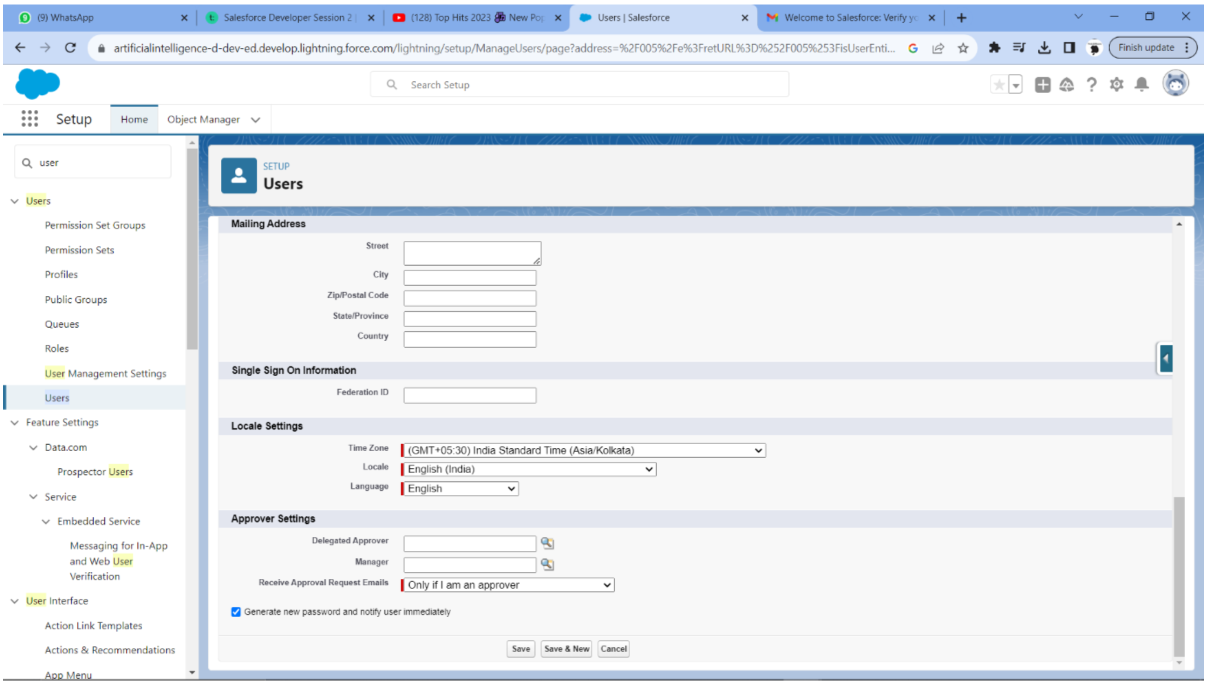
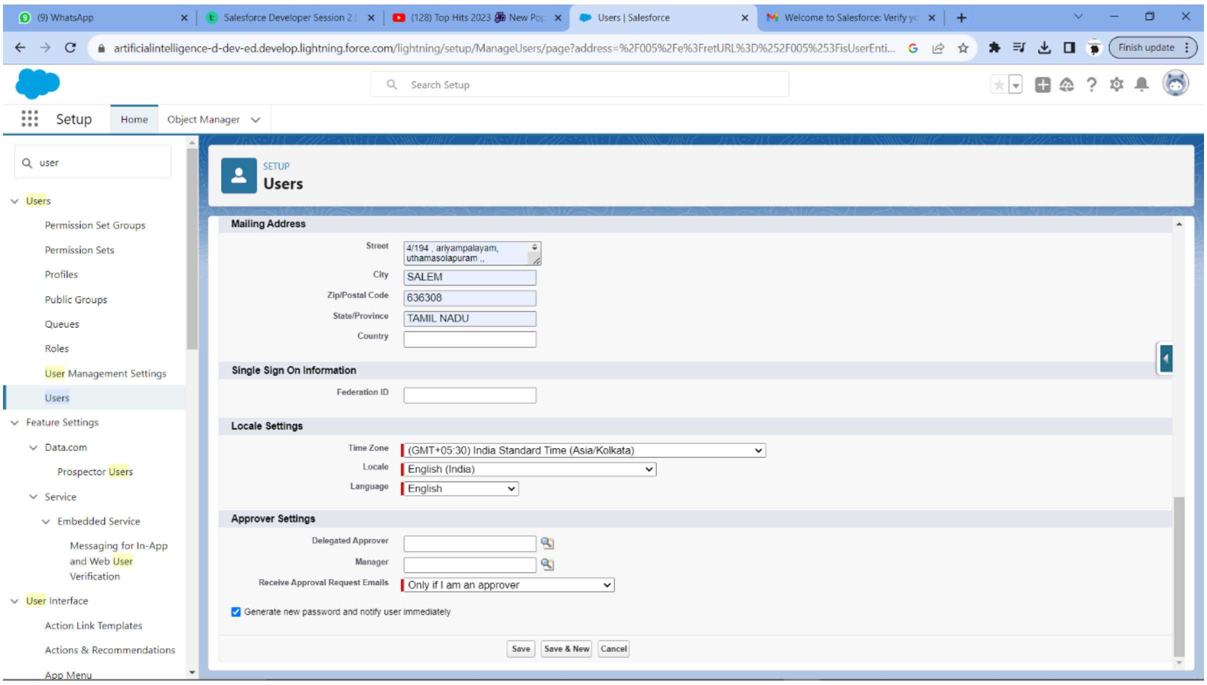
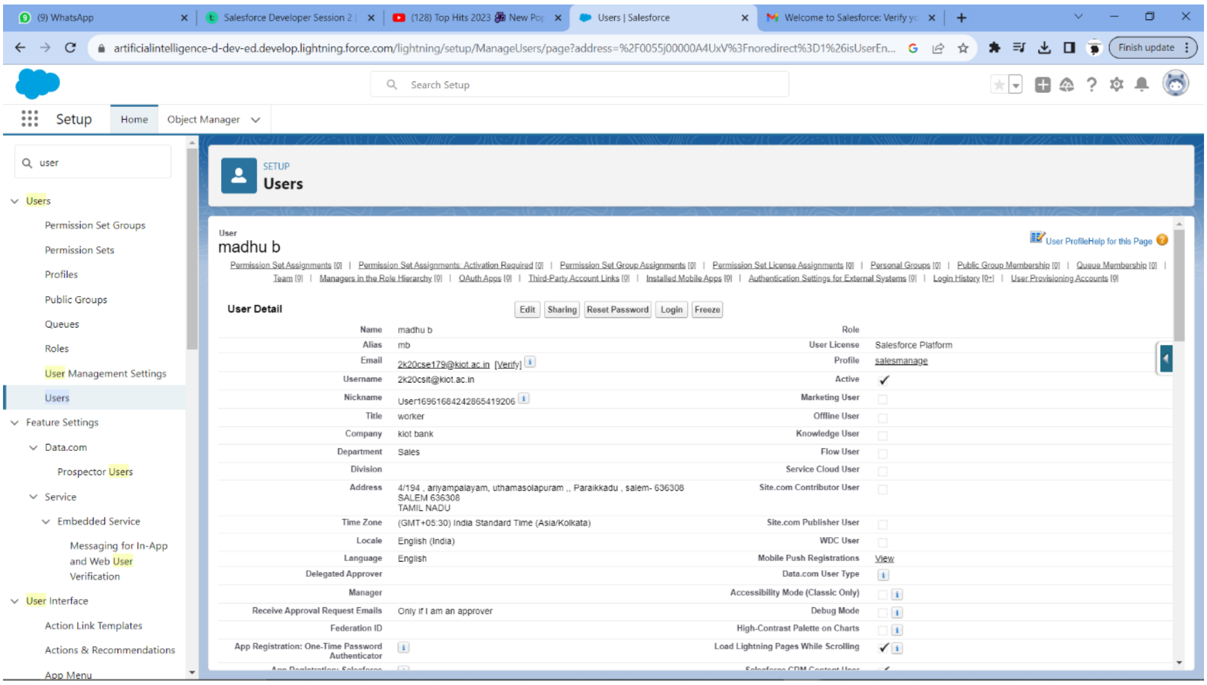
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
Maximum invalid login attempts
10
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails
Save
Save & New
Cancel

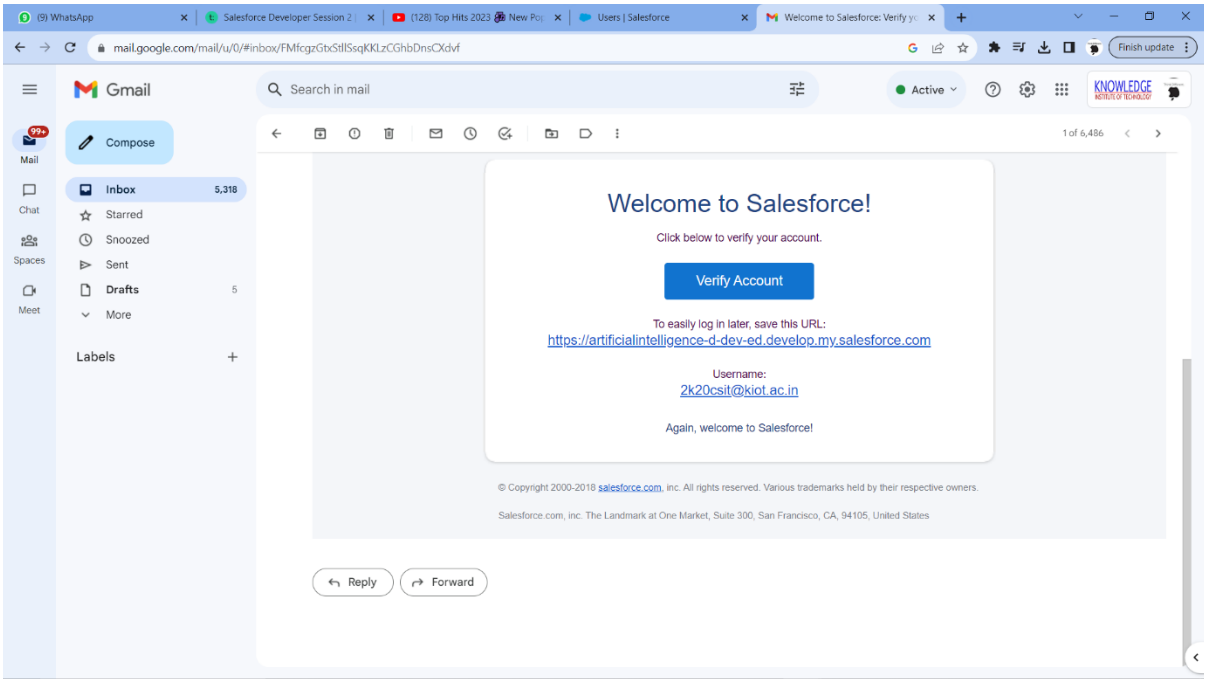

New User
User Edit
General Information
First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division
Role
User License
Profile
Active

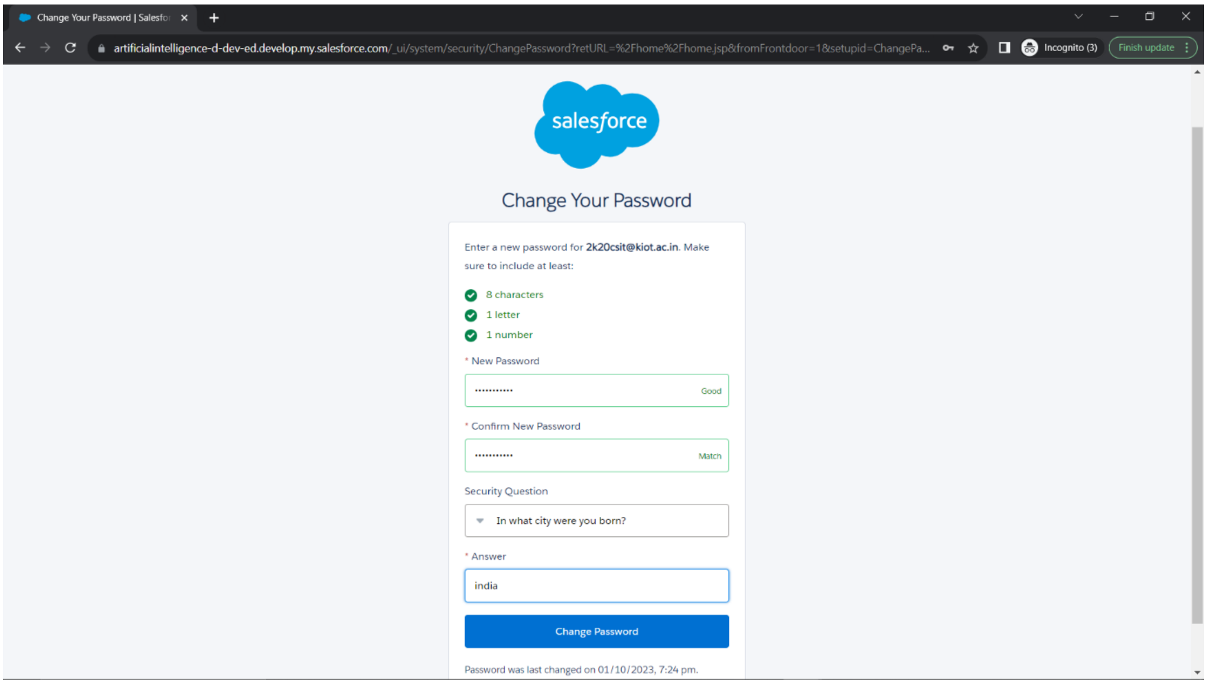

New User
User Edit
General Information
madhu
b
mb
2k20cse179@kiot.ac.in
2k20csit@kiot.ac.in
worker
kiot bank
Sales
Salesforce Platform
salesmanage

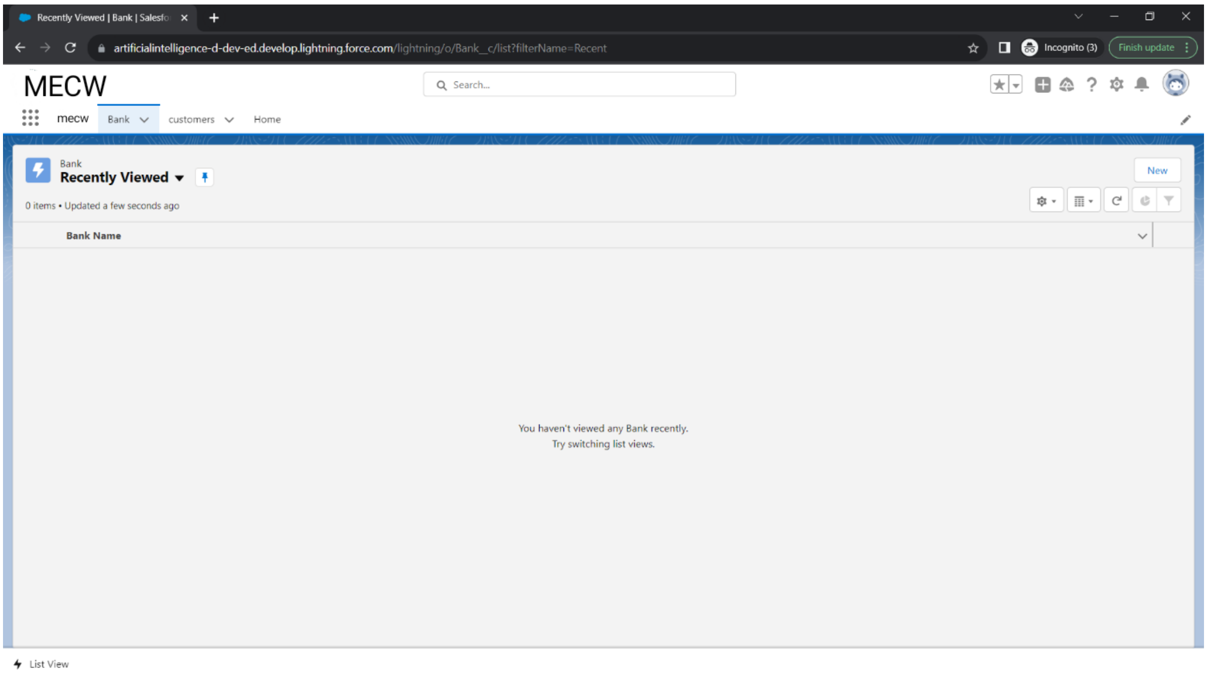

Setup
Home
Object Manager
Search Setup
SETUP
Users
Mailing Address
Street
City
Zip/Postal Code
State/Province
Country
Single Sign On Information
Federation ID
Locale Settings
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale
English (India)
Language
English
Approver Settings
Delegated Approver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

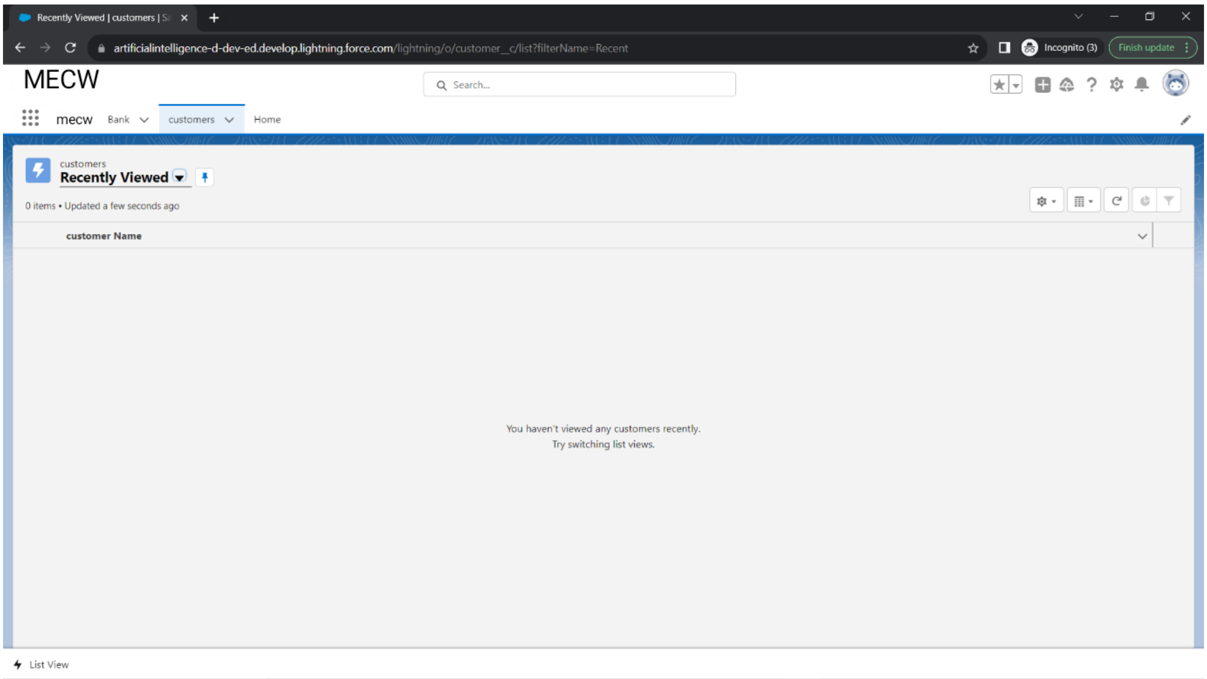

Setup
Home
Object Manager
Search Setup
SETUP
Users
Mailing Address
Street
4/194 , ariyampalayam, uthamasolapuram ,
City
SALEM
Zip/Postal Code
636308
State/Province
TAMIL NADU
Country
Single Sign On Information
Federation ID
Locale Settings
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale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

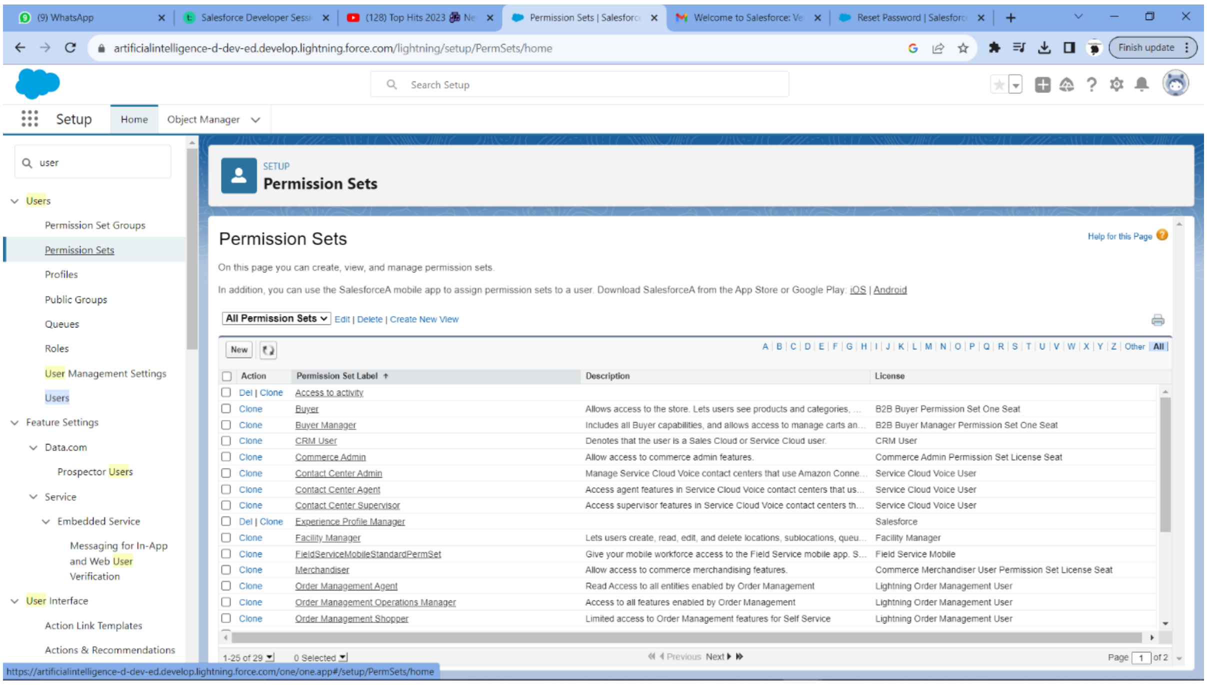

Setup
Home
Object Manager
Search Setup
SETUP
Users
User
madhu b
User Detail
Edit
Sharing
Reset Password
Login
Freeze
Name madhu b
Alias mb
Email 2k20cse179@kiot.ac.in [Verify]
Username 2k20csit@kiot.ac.in
Nickname User16961684242865419206
Title worker
Company kiot bank
Department Sales
Address 4/194 , ariyampalayam, uthamasolapuram ,, Paraikkadu , salem- 636308
SALEM 636308
TAMIL NADU
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Receive Approval Request Emails Only if I am an approver
User License Salesforce Platform
Profile salesmanage
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations


mail.google.com/mail/u/0/#inbox/FMfcgzGtxStlISsqKKLzCGhbDnsCXdvf
Gmail
Search in mail
Compose
Inbox 5,318
Starred
Snoozed
Sent
Drafts 5
More
Labels
Welcome to Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://artificialintelligence-d-dev-ed.develop.my.salesforce.com
Username:
2k20csit@kiot.ac.in
Again, welcome to Salesforce!
© 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
Reply
Forward


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
Search...
mecw
Bank
customers
Home
Bank
Recently Viewed
New
0 items • Updated a few seconds ago
Bank Name
You haven't viewed any Bank recently.
Try switching list views.
List View


MECW
mecw Bank customers Home
customers
Recently Viewed
0 items • Updated a few seconds ago
customer Name
You haven't viewed any customers recently.
Try switching list views.
List View


Setup Home Object Manager
SETUP
Permission Sets
Permission Sets
On this page you can create, view, and manage permission sets.
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android
All Permission Sets Edit | Delete | Create New View
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
Action Permission Set Label Description License
Access to activity
Buyer
Buyer Manager
CRM User
Commerce Admin
Contact Center Admin
Contact Center Agent
Contact Center Supervisor
Experience Profile Manager
Facility Manager
FieldServiceMobileStandardPermSet
Merchandiser
Order Management Agent
Order Management Operations Manager
Order Management Shopper
1-25 of 29 0 Selected Previous Next Page 1 of 2

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

• Create a sharing rule that shares Account records owned by User A with User A and records owned by IJser B with user B.

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

Ownership:

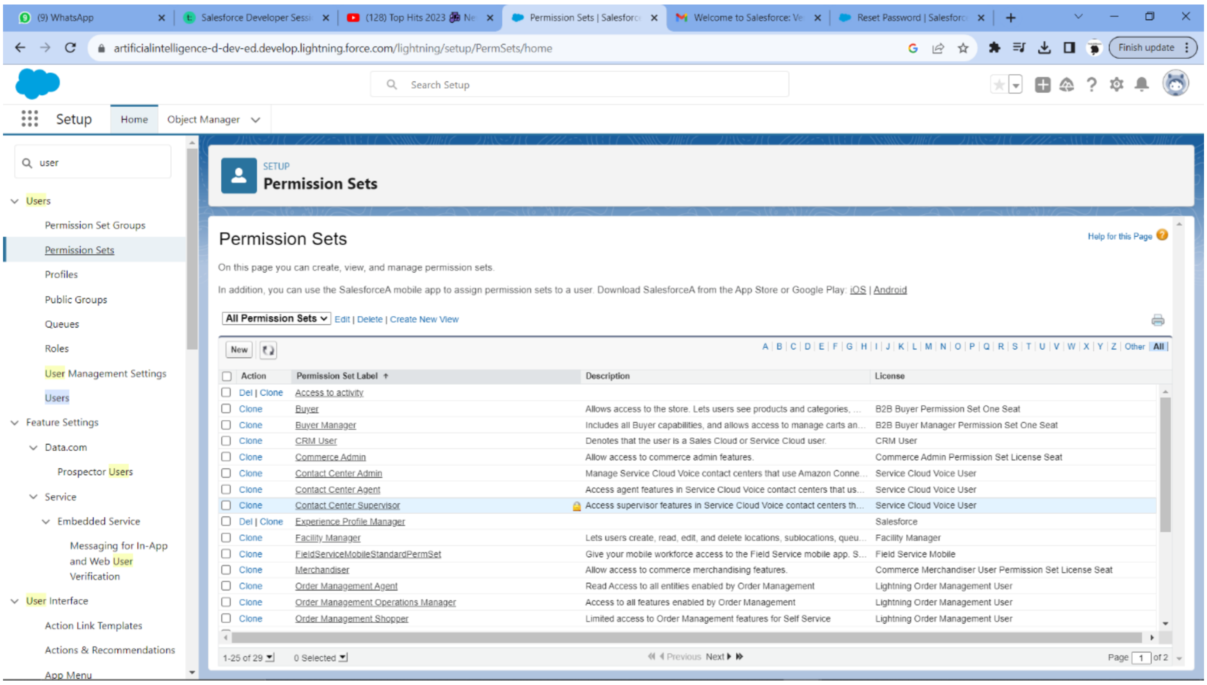
• Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

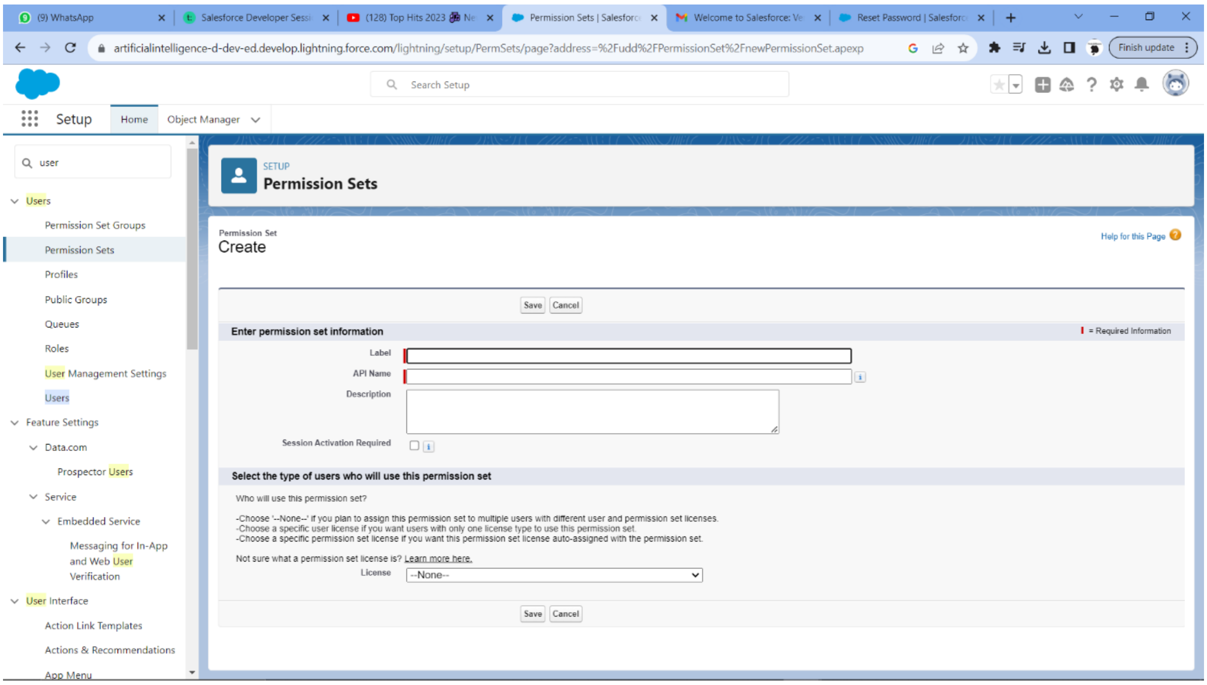
Organization-Wide Defaults:

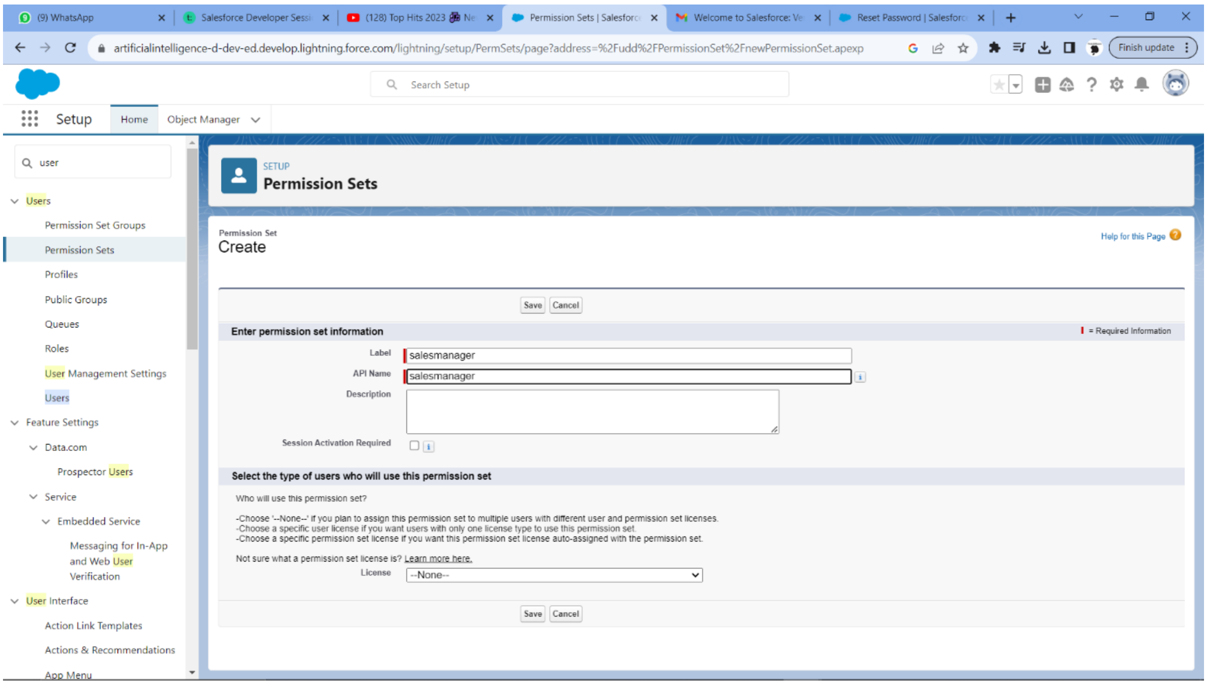
• Set the organization-wide defaults for the Account object to "Private" to ensure that records are private by default.

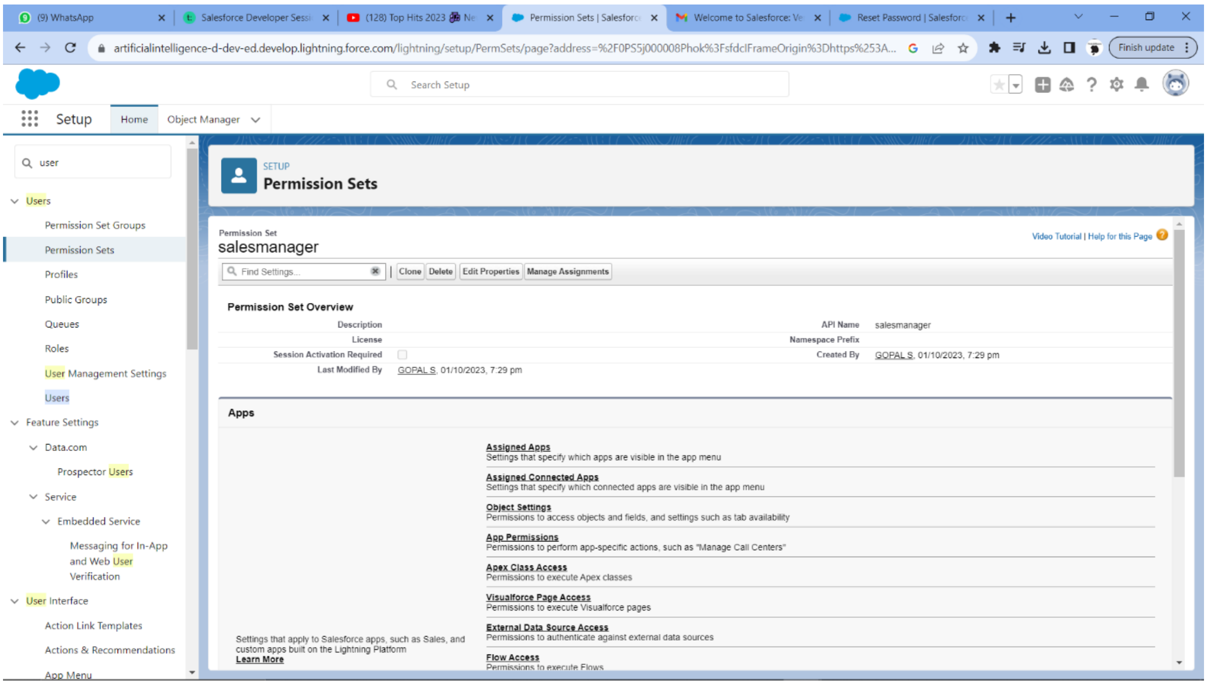
Testing:

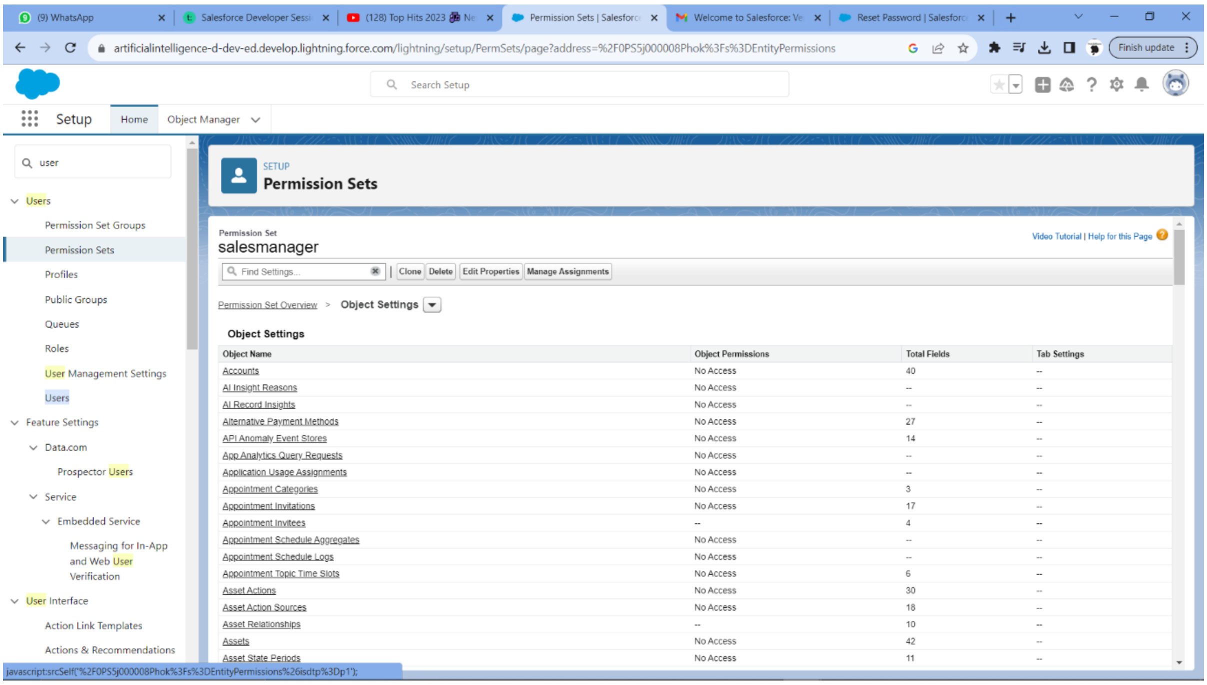
• Test the setup by logging in as User A and User B separately to verify that they cannot access each other's records.

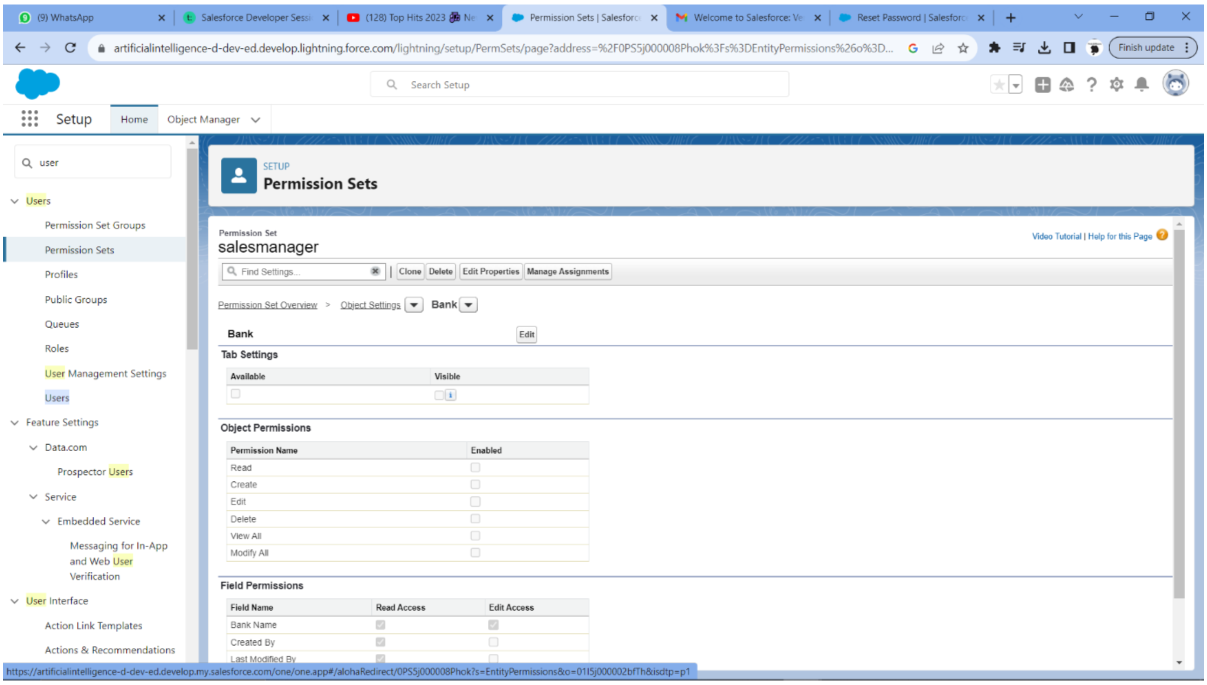


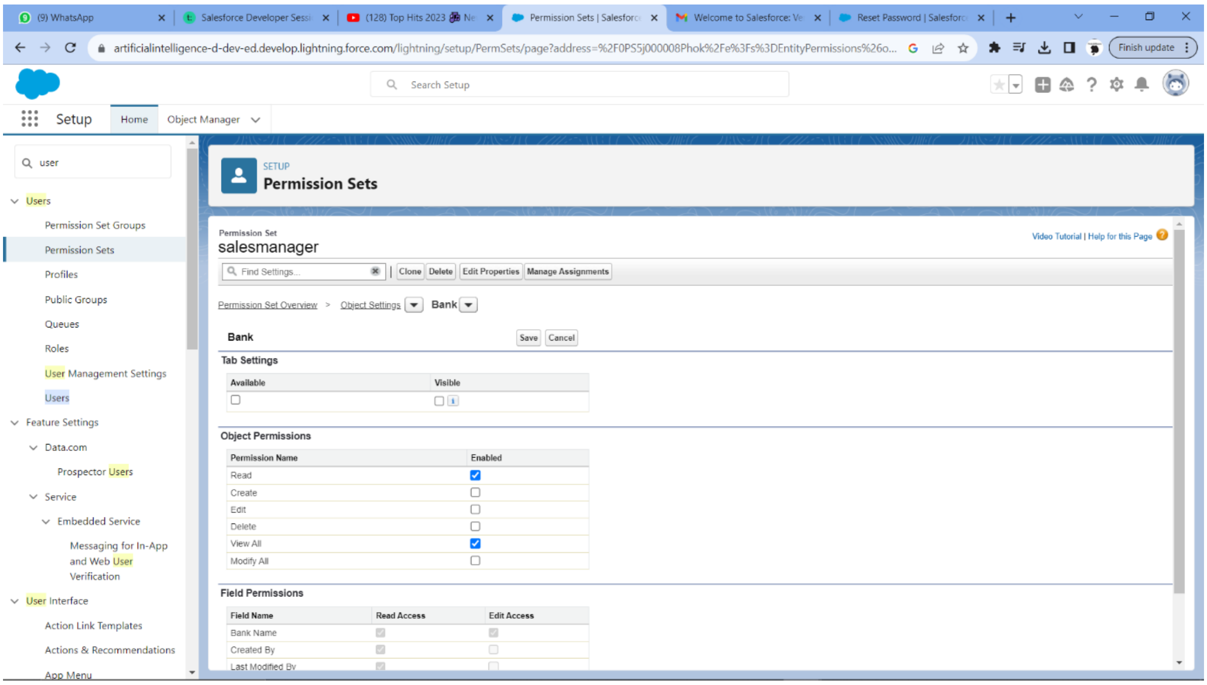

Setup
Home
Object Manager
SETUP
Permission Sets
Permission Set
Create
Help for this Page
Save Cancel
Enter permission set information
= Required Information
Label
API Name
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
Not sure what a permission set license is? Learn more here.
License
--None--
Save Cancel

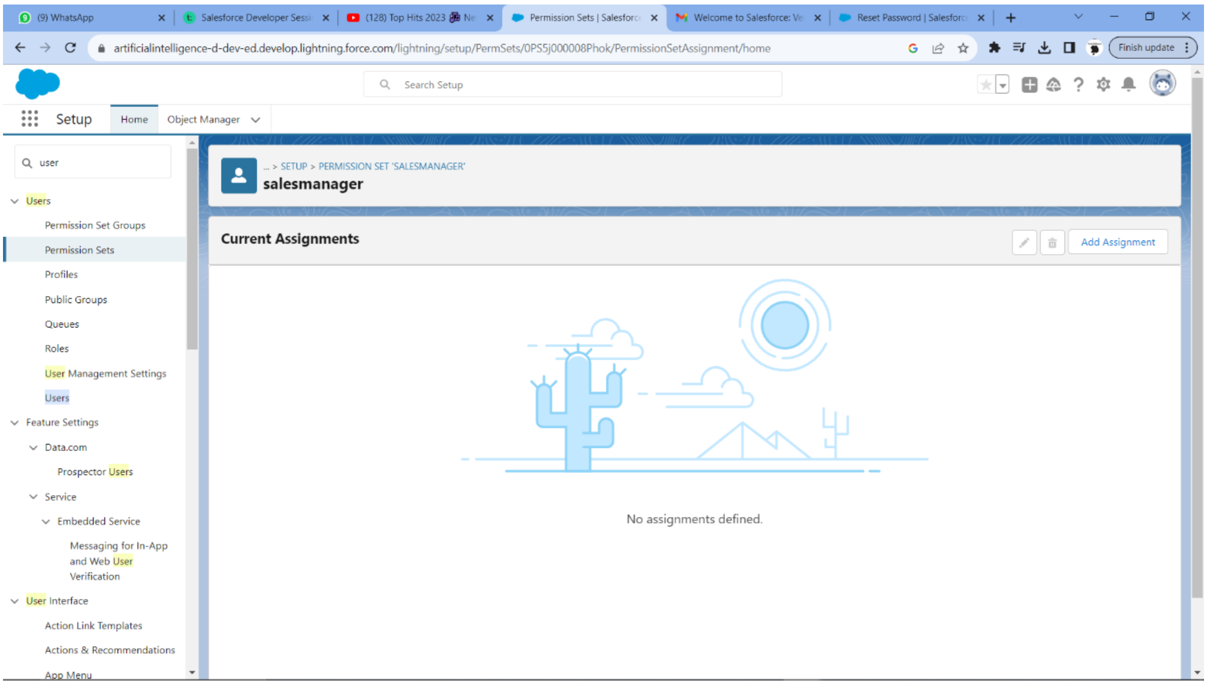

Setup
Home
Object Manager
SETUP
Permission Sets
Permission Set
Create
Help for this Page
Save Cancel
Enter permission set information
= Required Information
Label
salesmanager
API Name
salesmanager
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
Not sure what a permission set license is? Learn more here.
License
--None--
Save Cancel


SETUP
Permission Sets
Permission Set
salesmanager
Clone
Delete
Edit Properties
Manage Assignments
Video Tutorial | Help for this Page
Permission Set Overview
Description
License
Session Activation Required
Last Modified By GOPAL S, 01/10/2023, 7:29 pm
API Name salesmanager
Namespace Prefix
Created By GOPAL S, 01/10/2023, 7:29 pm
Apps
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
Learn More
Assigned Apps
Settings that specify which apps are visible in the app menu
Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu
Object Settings
Permissions to access objects and fields, and settings such as tab availability
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access
Permissions to execute Apex classes
Visualforce Page Access
Permissions to execute Visualforce pages
External Data Source Access
Permissions to authenticate against external data sources
Flow Access
Permissions to execute Flows

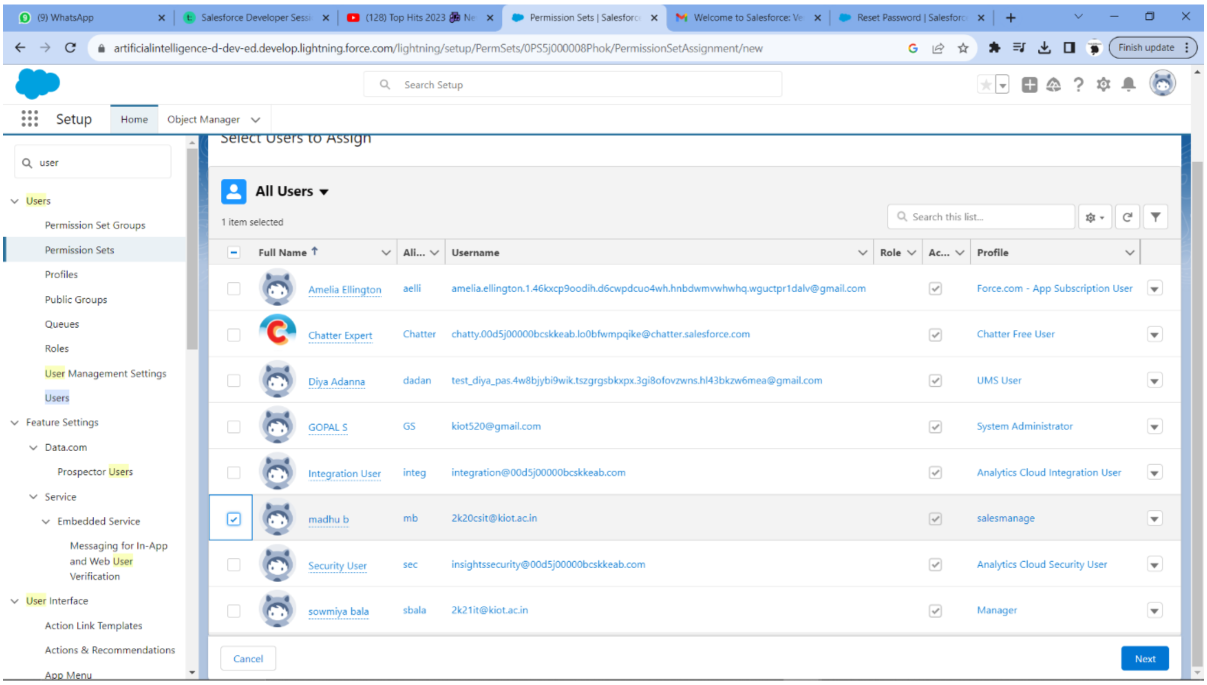

SETUP
Permission Sets
Permission Set
salesmanager
Clone
Delete
Edit Properties
Manage Assignments
Video Tutorial | Help for this Page
Permission Set Overview > Object Settings
Object Settings
Object Name
Object Permissions
Total Fields
Tab Settings
Accounts No Access 40 --
AI Insight Reasons No Access -- --
AI Record Insights No Access -- --
Alternative Payment Methods No Access 27 --
API Anomaly Event Stores No Access 14 --
App Analytics Query Requests No Access -- --
Application Usage Assignments No Access -- --
Appointment Categories No Access 3 --
Appointment Invitations No Access 17 --
Appointment Invitees -- 4 --
Appointment Schedule Aggregates No Access -- --
Appointment Schedule Logs No Access -- --
Appointment Topic Time Slots No Access 6 --
Asset Actions No Access 30 --
Asset Action Sources No Access 18 --
Asset Relationships -- 10 --
Assets No Access 42 --
Asset State Periods No Access 11 --


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

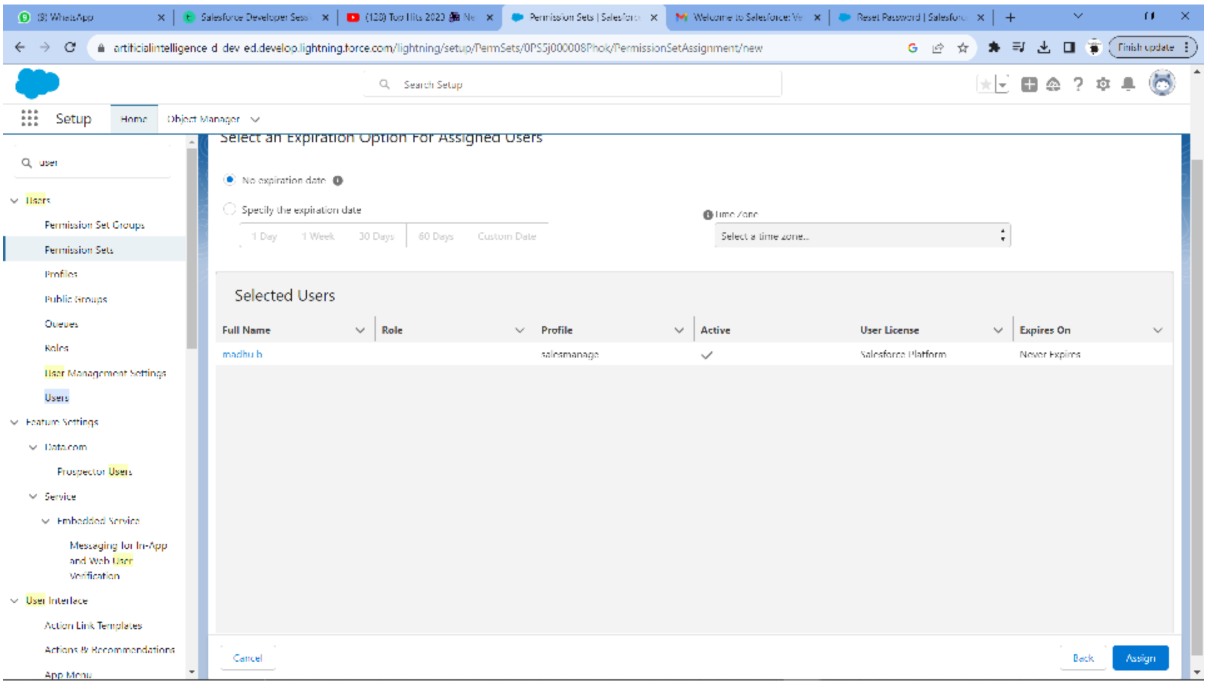

Setup
Home
Object Manager
Search Setup
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates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

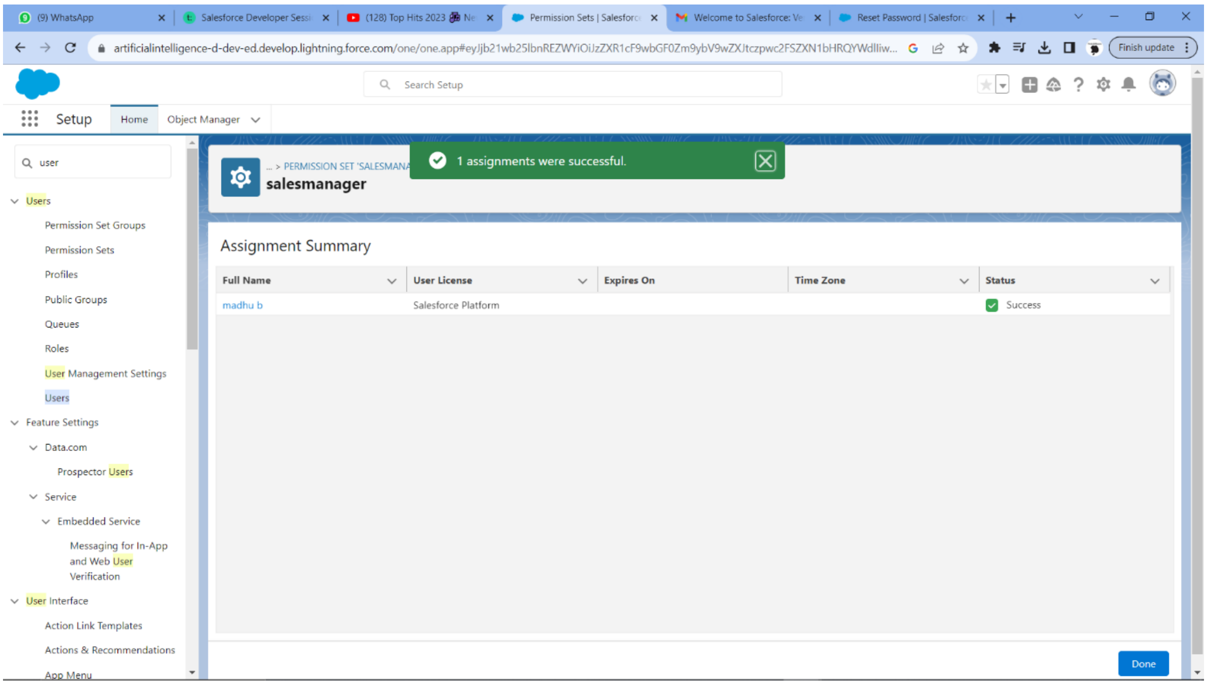


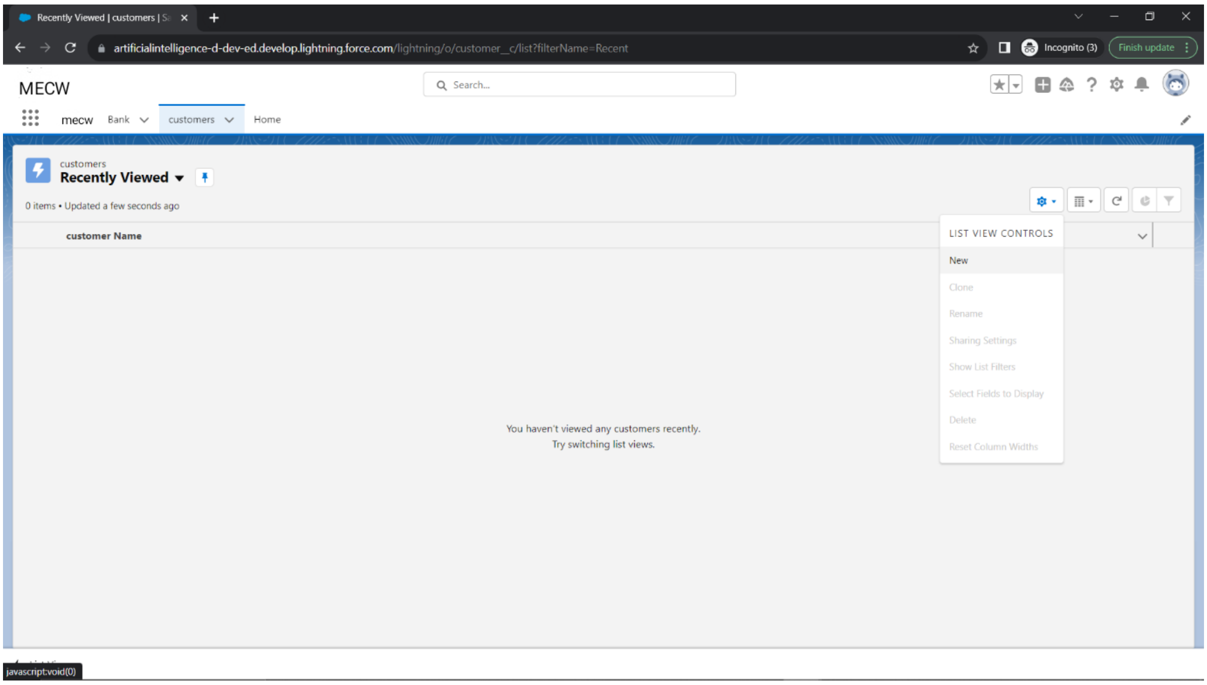
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008Phok/PermissionSetAssignment/home
Setup
Home
Object Manager
Search Setup
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP > PERMISSION SET 'SALESMANAGER'
salesmanager
Current Assignments
Add Assignment
No assignments defined.



artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008Phok/PermissionSetAssignment/new
Setup
Home
Object Manager
Search Setup
Select Users to Assign
All Users
1 item selected
Search this list...
Full Name
All...
Username
Role
Ac...
Profile
Amelia Ellington
aelli
amelia.ellington.1.46kxcp9oodih.d6cwpdcuo4wh.hnbdwmvwhwhq.wguctpr1dalv@gmail.com
Force.com - App Subscription User
Chatter Expert
Chatter
chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com
Chatter Free User
Diya Adanna
dadan
test_diya_pas.4w8bjybi9wik.tszgrgsbkxpx.3gi8ofovzwns.hl43bkzw6mea@gmail.com
UMS User
GOPAL S
GS
kiot520@gmail.com
System Administrator
Integration User
integ
integration@00d5j00000bcskkeab.com
Analytics Cloud Integration User
madhu b
mb
2k20csit@kiot.ac.in
salesmanage
Security User
sec
insightssecurity@00d5j00000bcskkeab.com
Analytics Cloud Security User
sowmiya bala
sbala
2k21it@kiot.ac.in
Manager
Cancel
Next


Setup
Home
Object Manager
Select an Expiration Option For Assigned Users
No expiration date
Specify the expiration date
1 Day
1 Week
30 Days
60 Days
Custom Date
Time Zone
Select a time zone...
Selected Users
Full Name
Role
Profile
Active
User License
Expires On
madhu b
salesmanage
Salesforce Platform
Never Expires
Cancel
Back
Assign
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu


Setup
Home
Object Manager
PERMISSION SET 'SALESMANA
1 assignments were successful.
salesmanager
Assignment Summary
Full Name
User License
Expires On
Time Zone
Status
madhu b
Salesforce Platform
Success
Done
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu

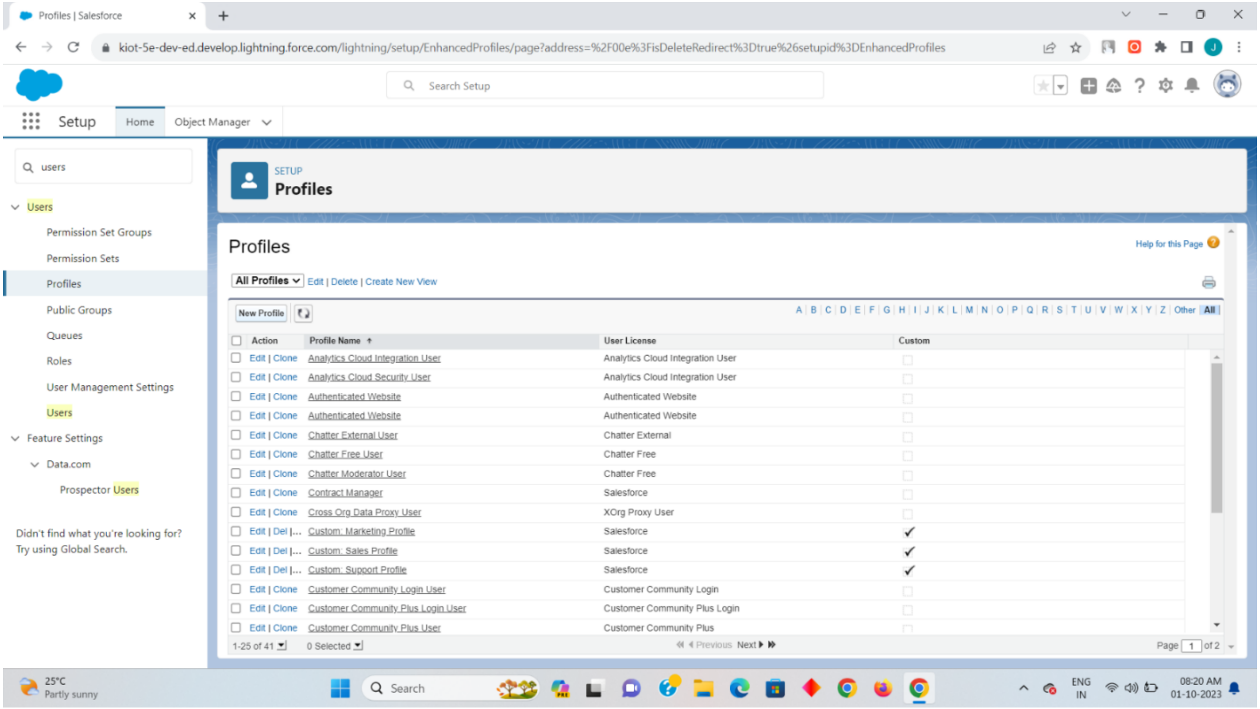

Recently Viewed | customers | Sa
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer__c/list?filterName=Recent
Incognito (3)
Finish update
MECW
Search...
mecw
Bank
customers
Home
customers
Recently Viewed
0 items • Updated a few seconds ago
customer Name
LIST VIEW CONTROLS
New
Clone
Rename
Sharing Settings
Show List Filters
Select Fields to Display
Delete
Reset Column Widths
You haven't viewed any customers recently.
Try switching list views.
javascript:void(0)

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

Solution:

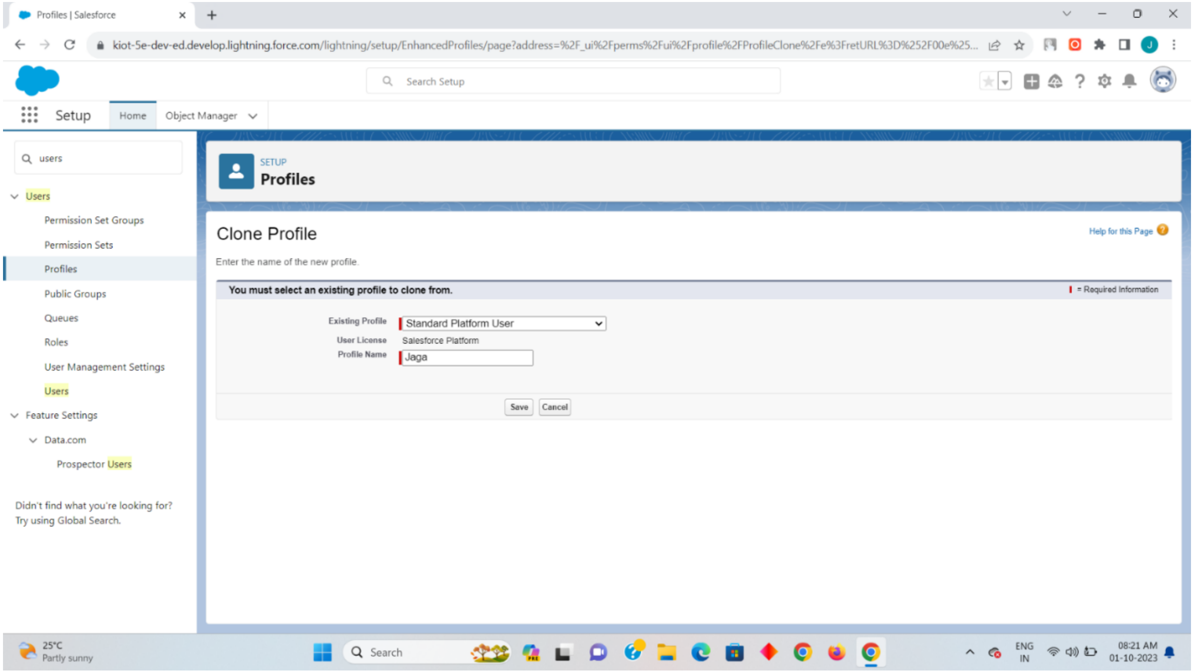
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

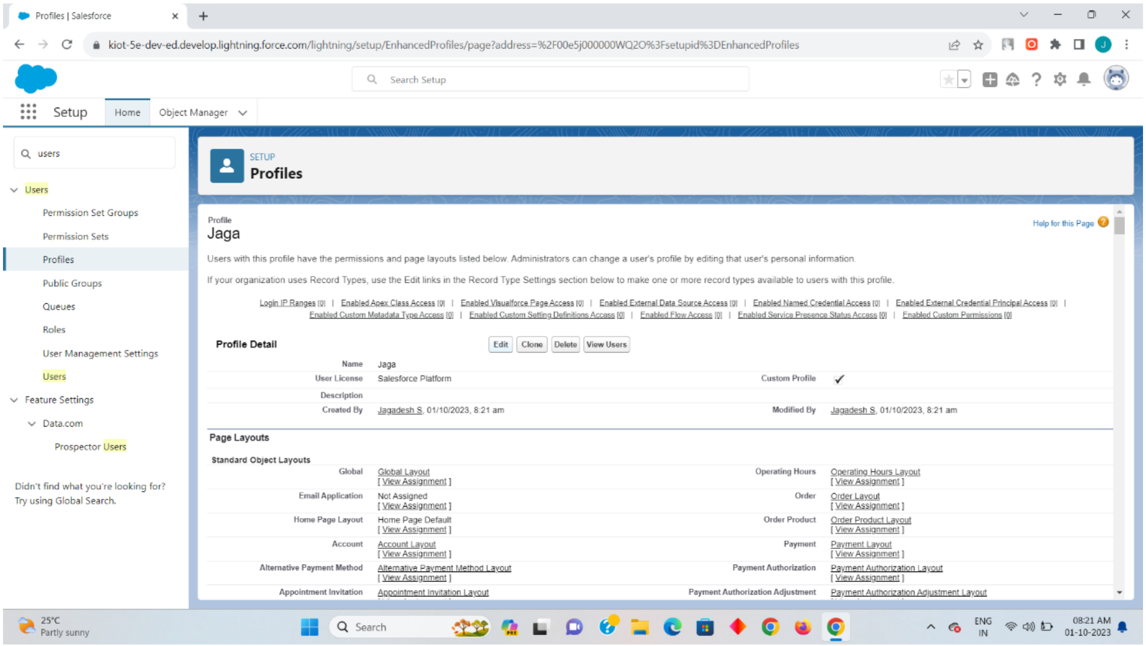
Click on the new to create a new profile along with the label and Api

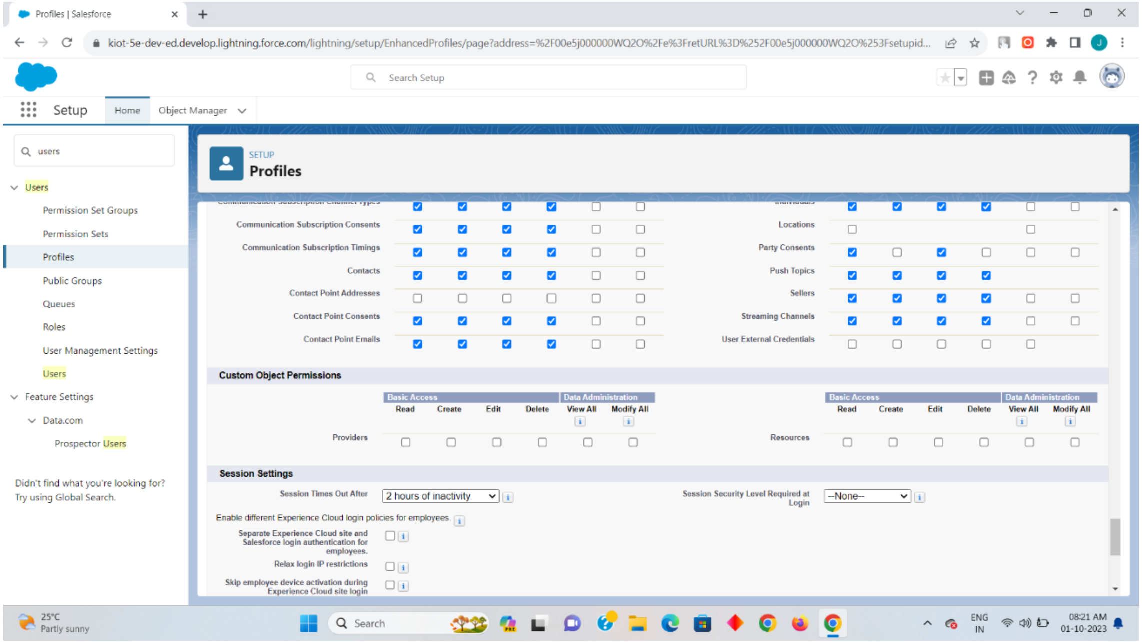


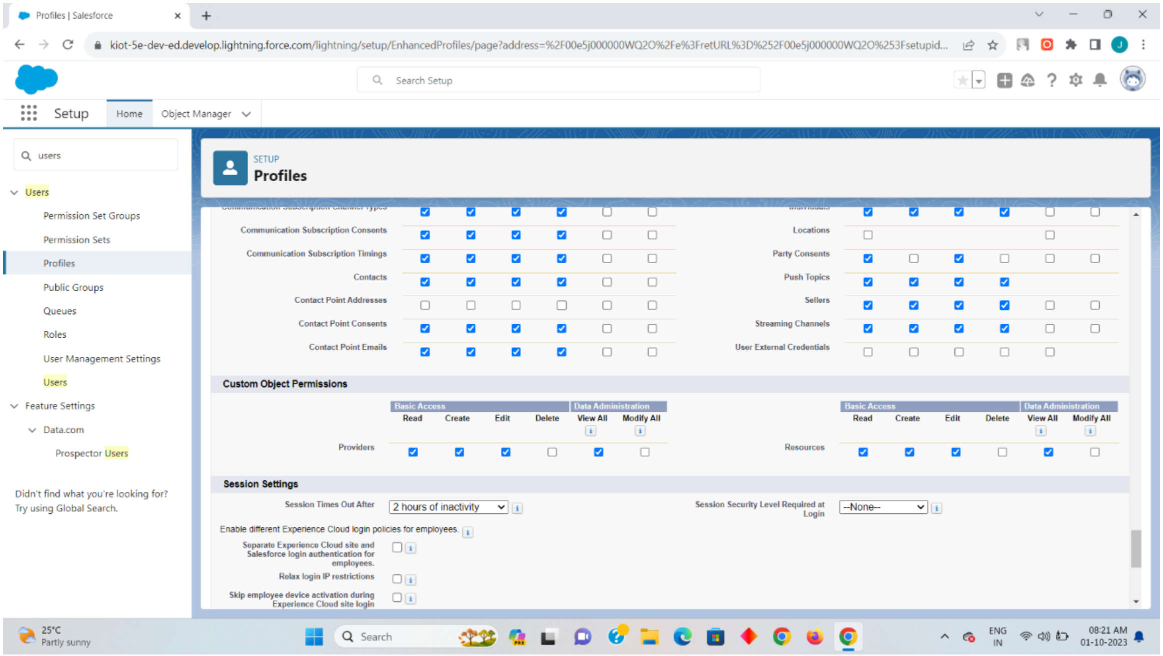
Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.

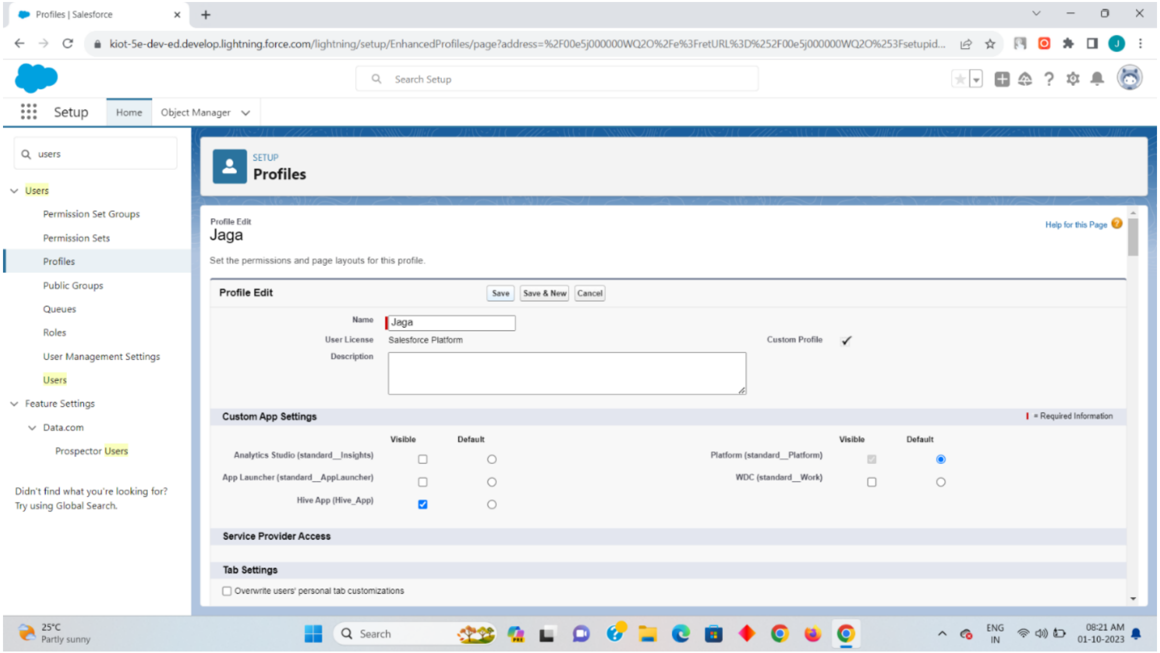
Step 3:

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



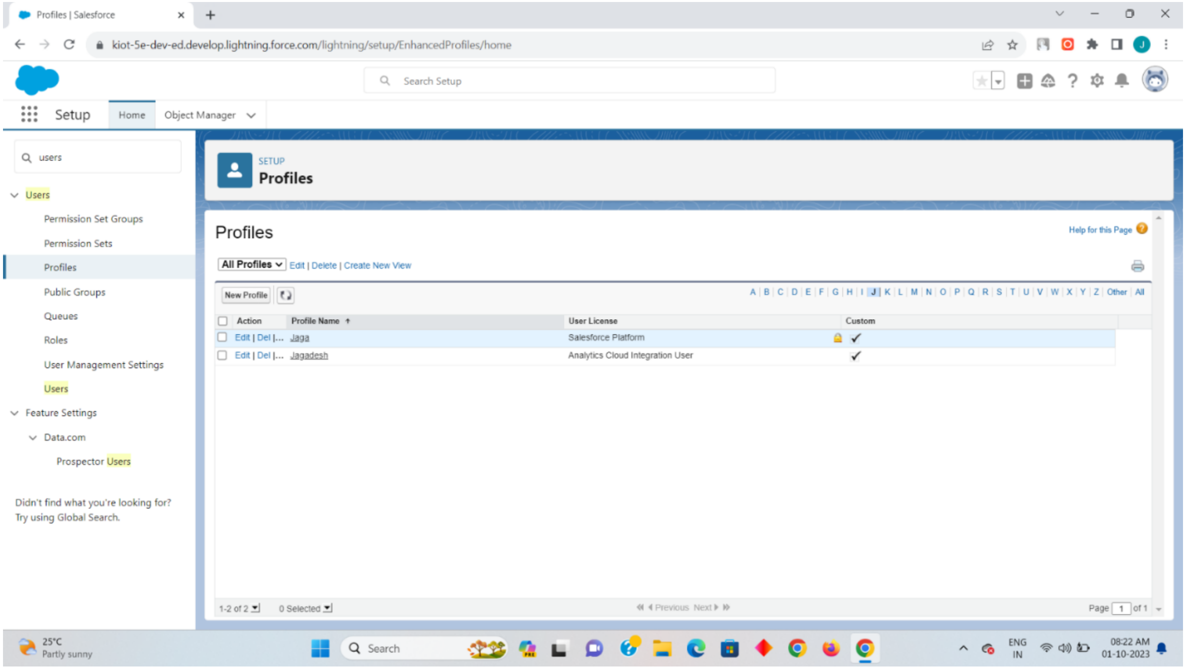

Profiles | Salesforce
Search Setup
Setup
Home
Object Manager
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Communication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


Profiles | Salesforce
Search Setup
Setup
Home
Object Manager
users
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 Consents
Communication Subscription Timings
Contacts
Contact Point Addresses
Contact Point Consents
Contact Point Emails
Locations
Party Consents
Push Topics
Sellers
Streaming Channels
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Providers
Resources
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Enable different Experience Cloud login policies for employees.
Separate Experience Cloud site and Salesforce login authentication for employees.
Relax login IP restrictions
Skip employee device activation during Experience Cloud site login



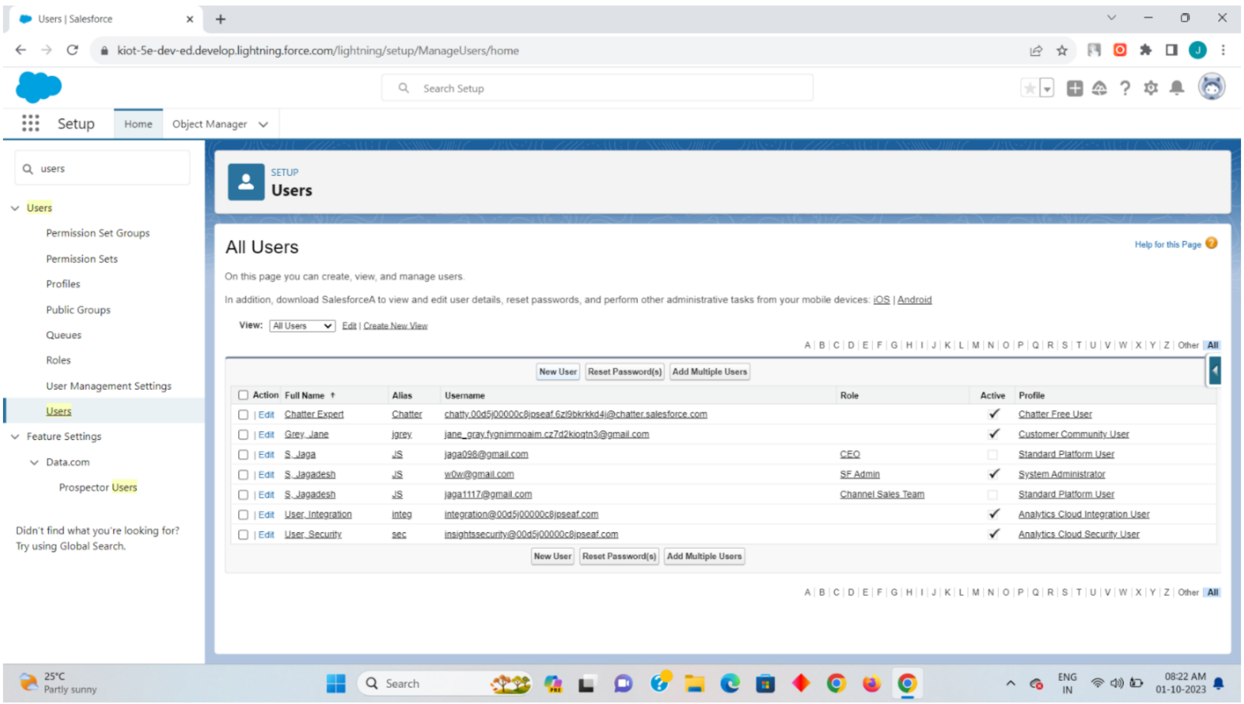
Step 4

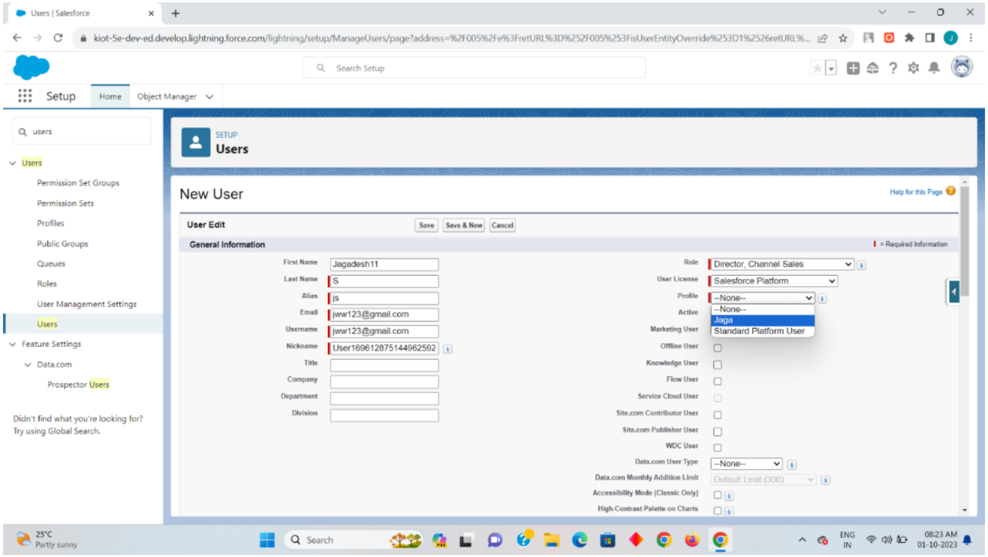
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it

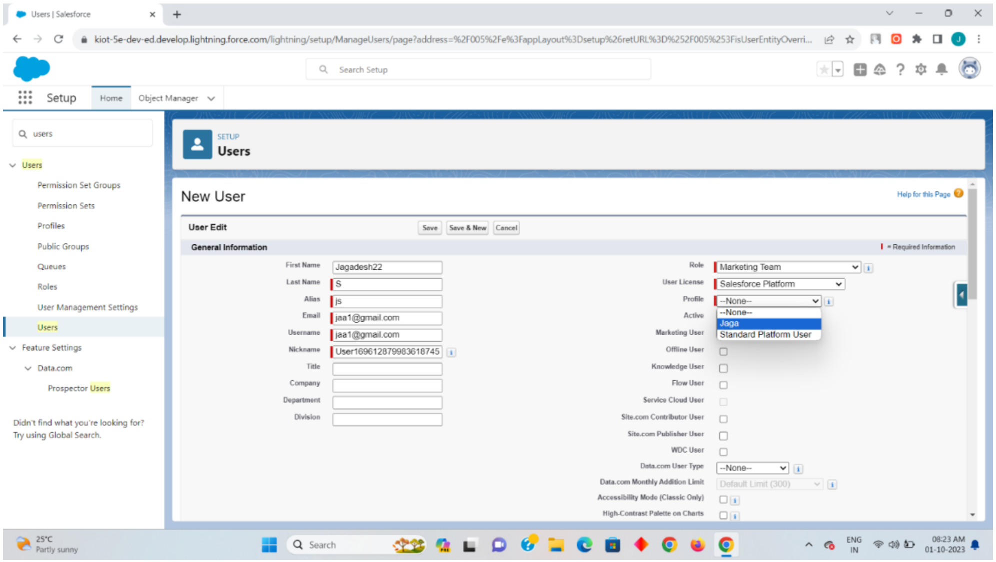


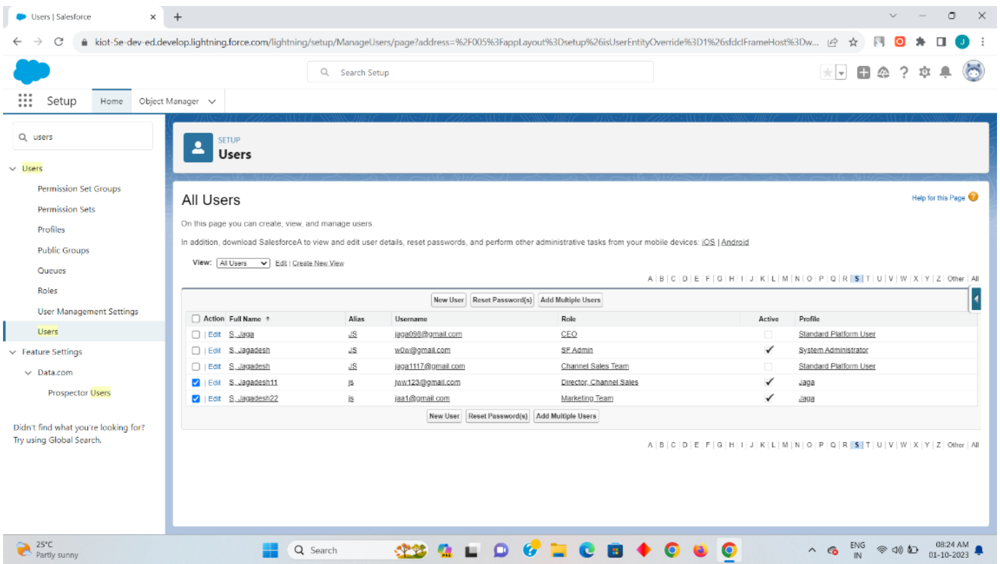
Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along with the profile as Jaga which we have created on the step 2.once the one user has been created click on the save&new so that you can create the second user and there the user name can been created with alternate name but with the same user profile and once the two user are create click on save.




Users | Salesforce
Setup
Home
Object Manager
SETUP
Users
New User
User Edit
Save
Save & New
Cancel
General Information
First Name
Jagadesh11
Last Name
S
Alias
js
Email
jww123@gmail.com
Username
jww123@gmail.com
Role
Director, Channel Sales
User License
Salesforce Platform
Profile
--None--
Jaga
Standard Platform User


Users | Salesforce
Setup
Home
Object Manager
SETUP
Users
New User
User Edit
Save
Save & New
Cancel
General Information
First Name
Jagadesh22
Last Name
S
Alias
js
Email
jaa1@gmail.com
Username
jaa1@gmail.com
Role
Marketing Team
User License
Salesforce Platform
Profile
--None--
Jaga
Standard Platform User

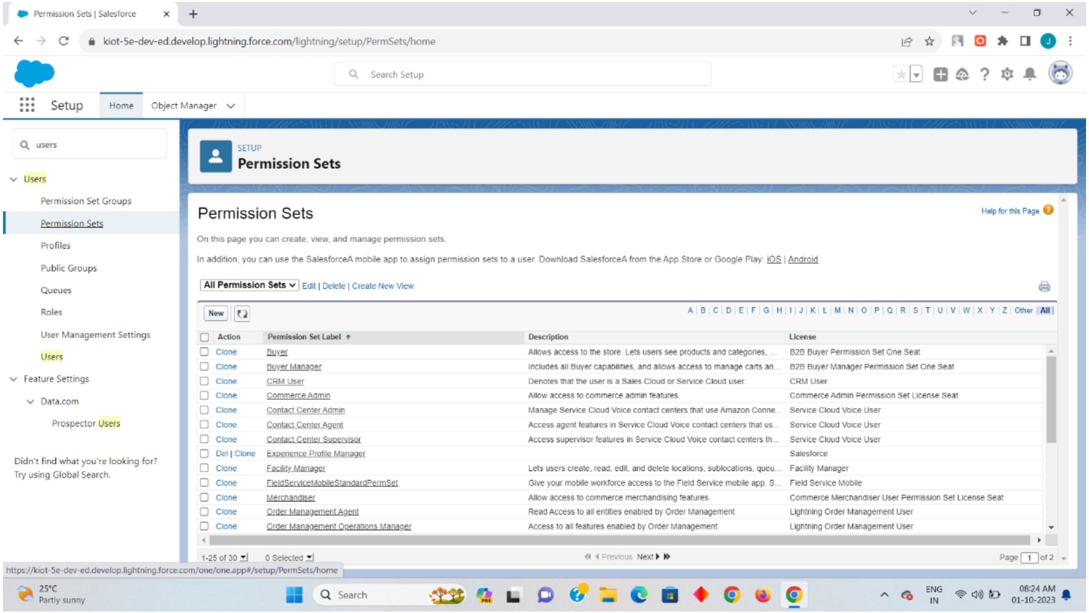

Users | Salesforce
Setup
Home
Object Manager
SETUP
Users
All Users
On this page you can create, view, and manage users
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile

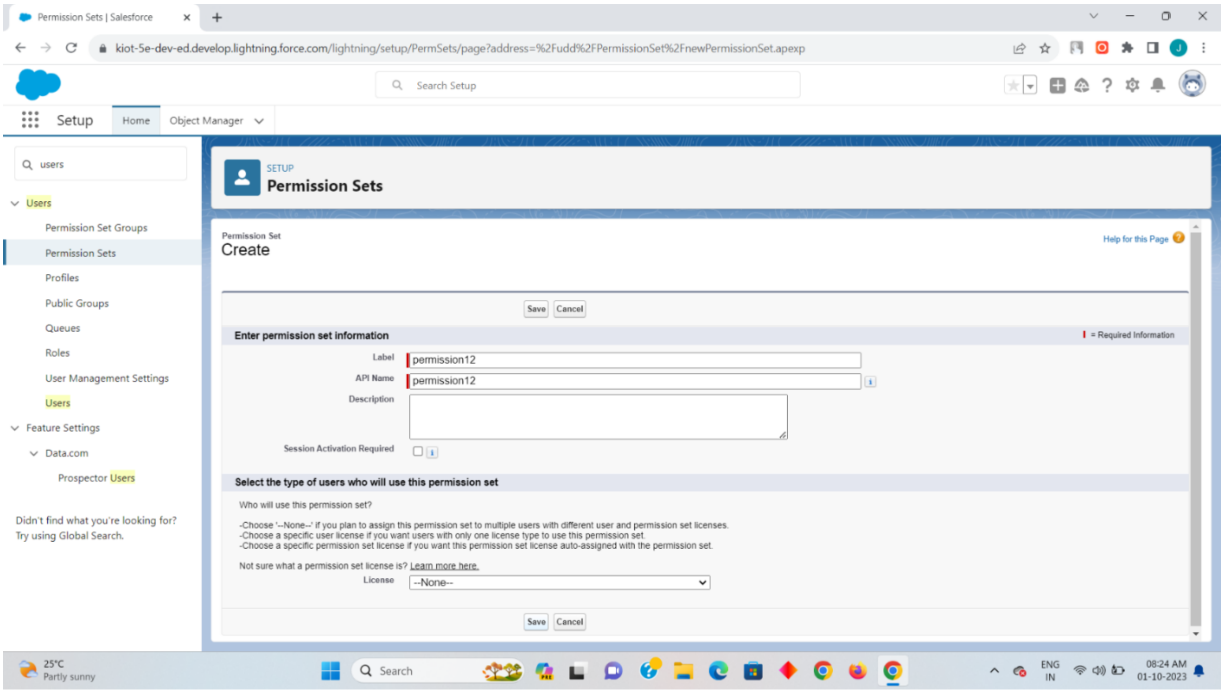
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

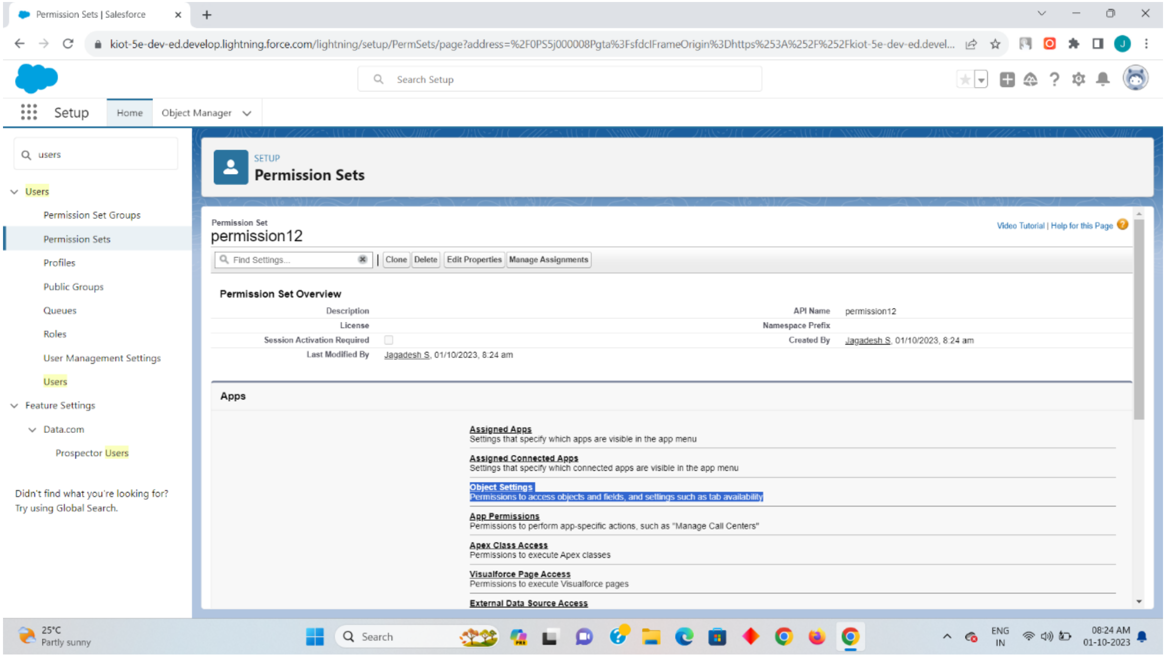
Step 6:

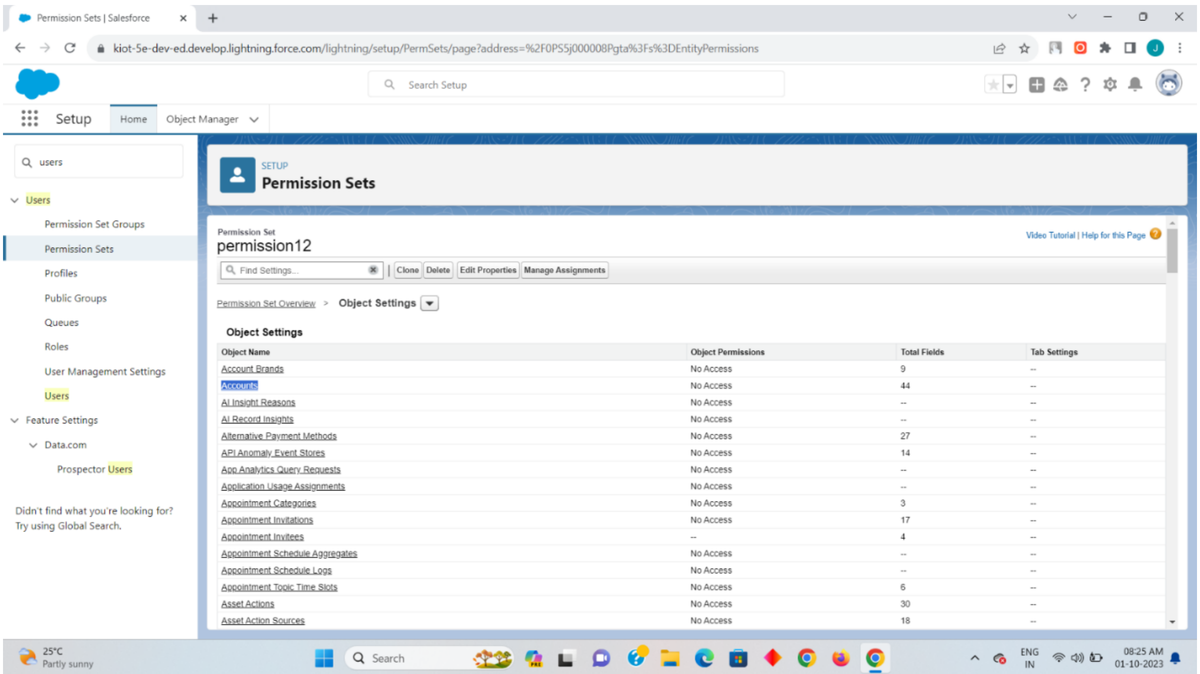
Now the two user as been created with the profle so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can created as

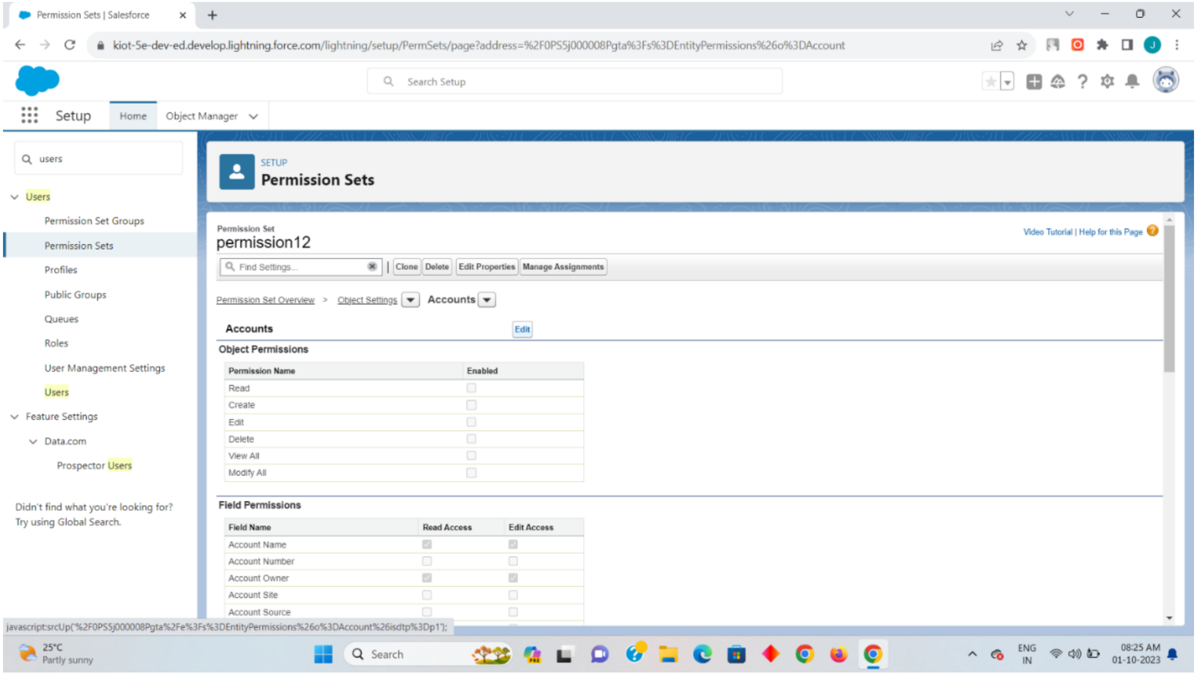
<u>setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.</u>


Permission Sets | Salesforce
kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home
Search Setup
Setup
Home
Object Manager
users
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
Permission Sets
Permission Sets
Help for this Page
On this page you can create, view, and manage permission sets.
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android
All Permission Sets
Edit | Delete | Create New View
New
Action
Permission Set Label
Description
License
Clone
Buyer
Allows access to the store. Lets users see products and categories, ...
B2B Buyer Permission Set One Seat
Buyer Manager
Includes all Buyer capabilities, and allows access to manage carts an...
B2B Buyer Manager Permission Set One Seat
CRM User
Denotes that the user is a Sales Cloud or Service Cloud user.
CRM User
Commerce Admin
Allow access to commerce admin features.
Commerce Admin Permission Set License Seat
Contact Center Admin
Manage Service Cloud Voice contact centers that use Amazon Conne...
Service Cloud Voice User
Contact Center Agent
Access agent features in Service Cloud Voice contact centers that us...
Service Cloud Voice User
Contact Center Supervisor
Access supervisor features in Service Cloud Voice contact centers th...
Service Cloud Voice User
Del | Clone
Experience Profile Manager
Salesforce
Facility Manager
Lets users create, read, edit, and delete locations, sublocations, queu...
Facility Manager
FieldServiceMobileStandardPermSet
Give your mobile workforce access to the Field Service mobile app. S...
Field Service Mobile
Merchandiser
Allow access to commerce merchandising features.
Commerce Merchandiser User Permission Set License Seat
Order Management Agent
Read Access to all entities enabled by Order Management
Lightning Order Management User
Order Management Operations Manager
Access to all features enabled by Order Management
Lightning Order Management User
1-25 of 30
0 Selected
Previous
Next
Page 1 of 2
25°C
Partly sunny
Search
ENG
IN
08:24 AM
01-10-2023


Permission Sets | Salesforce
kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp
Search Setup
Setup
Home
Object Manager
users
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
Permission Sets
Permission Set
Create
Help for this Page
Save
Cancel
Enter permission set information
= Required 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
25°C
Partly sunny
Search
ENG
IN
08:24 AM
01-10-2023

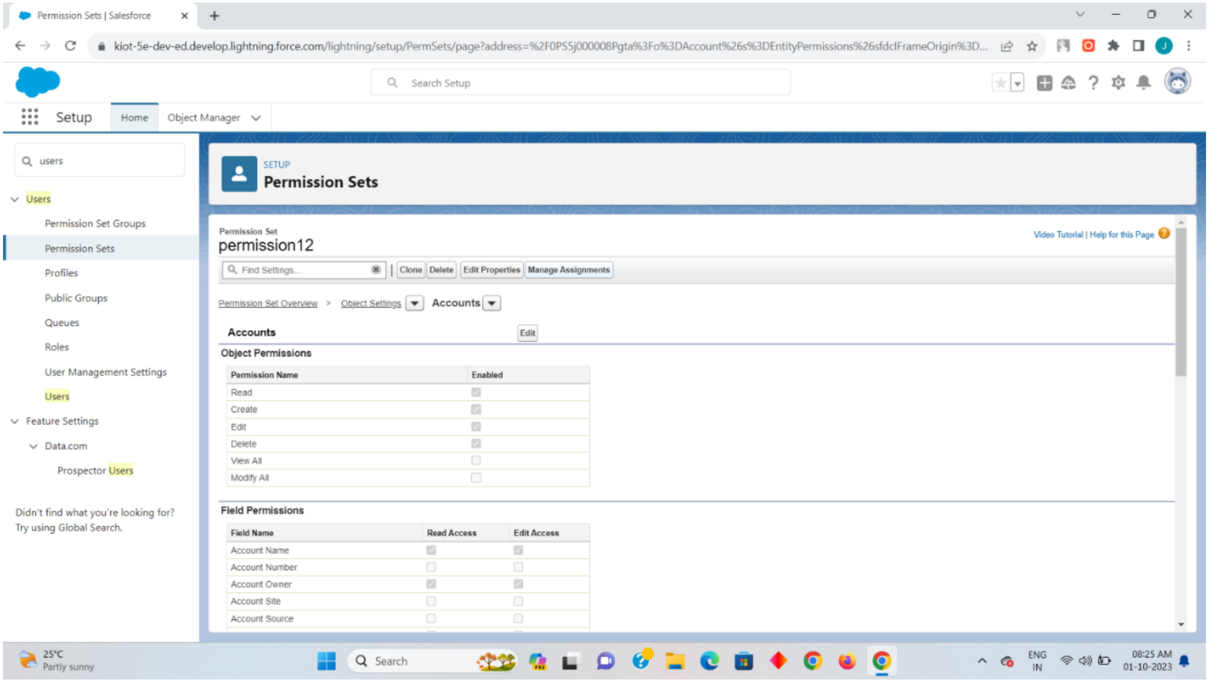

Permission Sets | Salesforce
Setup
Home
Object Manager
Search Setup
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.
SETUP
Permission Sets
Permission Set
permission12
Video Tutorial | Help for this Page
Clone Delete Edit Properties Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By Jagadesh S, 01/10/2023, 8:24 am
API Name permission12
Namespace Prefix
Created By Jagadesh 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
Object Settings
Permissions to access objects and fields, and settings such as tab availability
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access
Permissions to execute Apex classes
Visualforce Page Access
Permissions to execute Visualforce pages
External Data Source Access
25°C
Partly sunny
Search
08:24 AM
01-10-2023

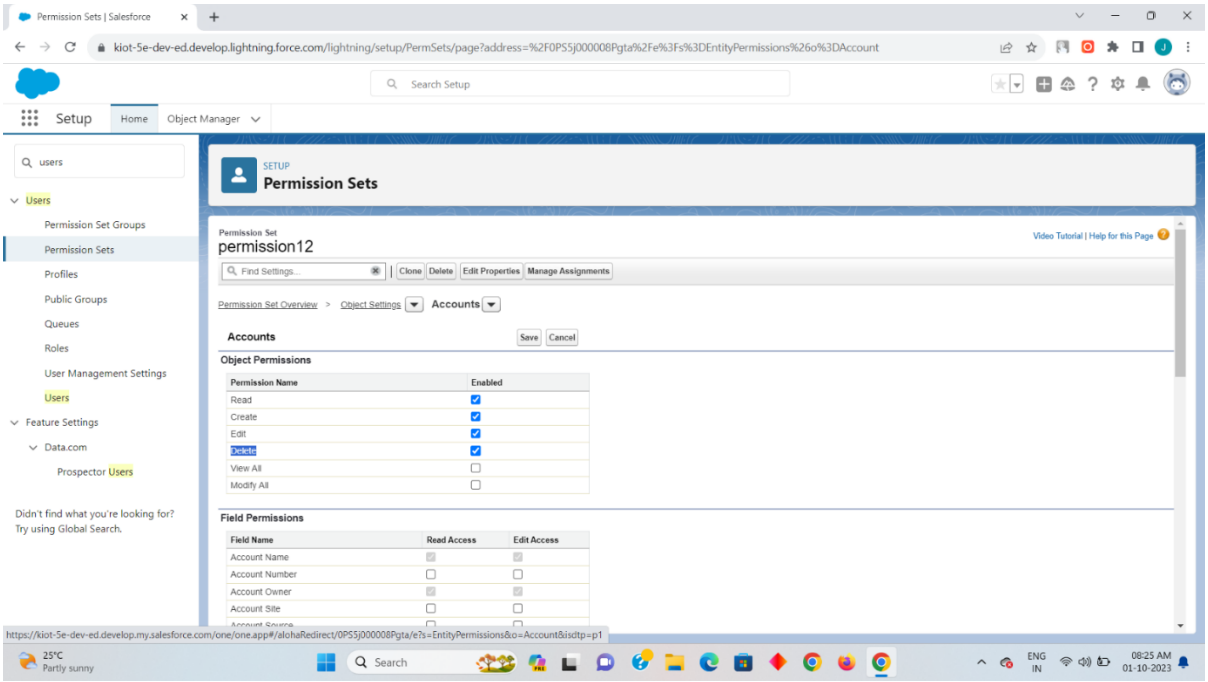

Permission Sets | Salesforce
Setup
Home
Object Manager
Search Setup
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.
SETUP
Permission Sets
Permission Set
permission12
Video Tutorial | Help for this Page
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
25°C
Partly sunny
Search
08:25 AM
01-10-2023



Step 7:

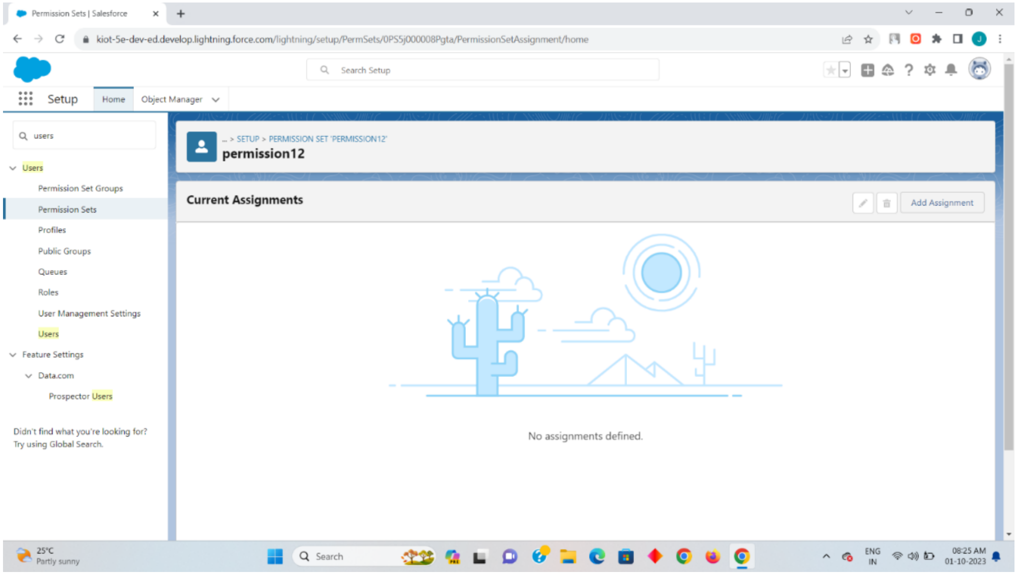
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

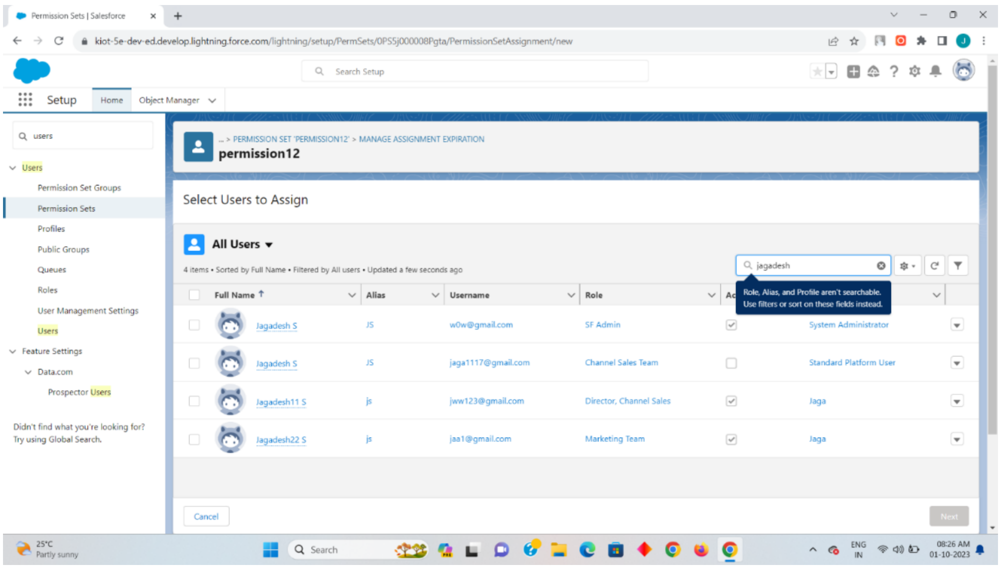


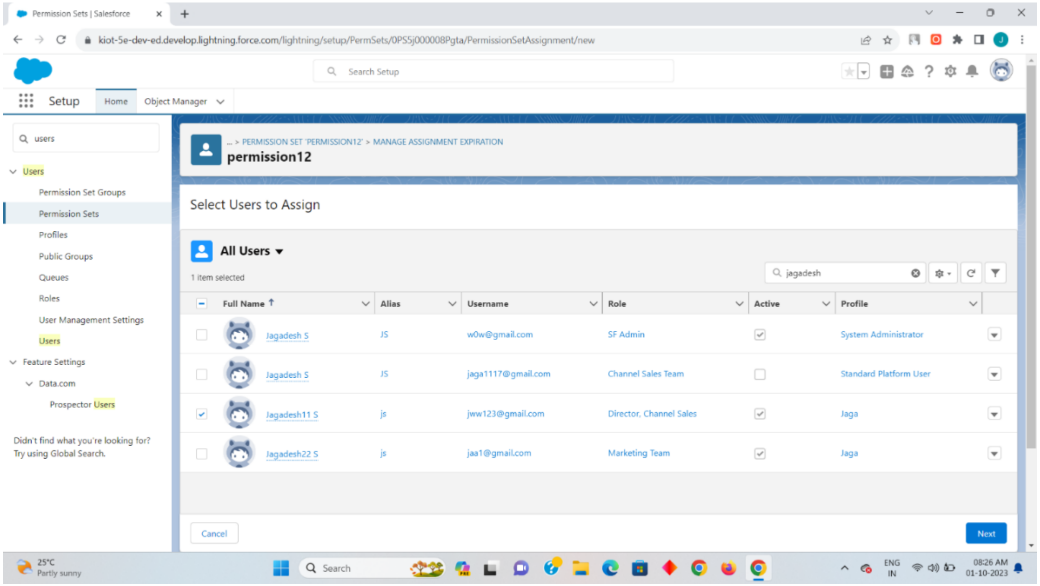


Step 8

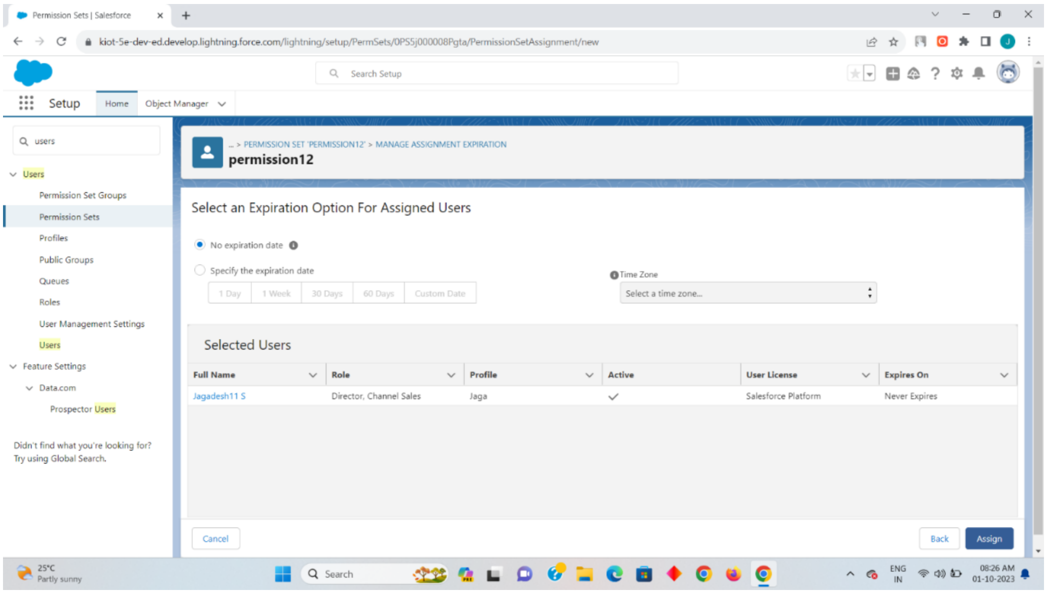
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



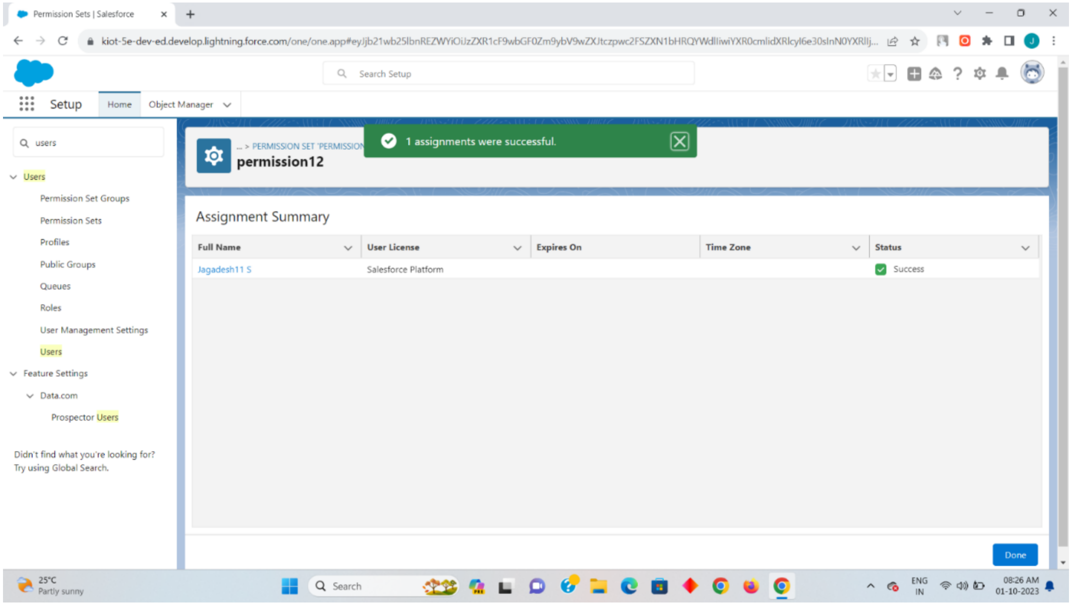




Click on next.



Now click on Assign.



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

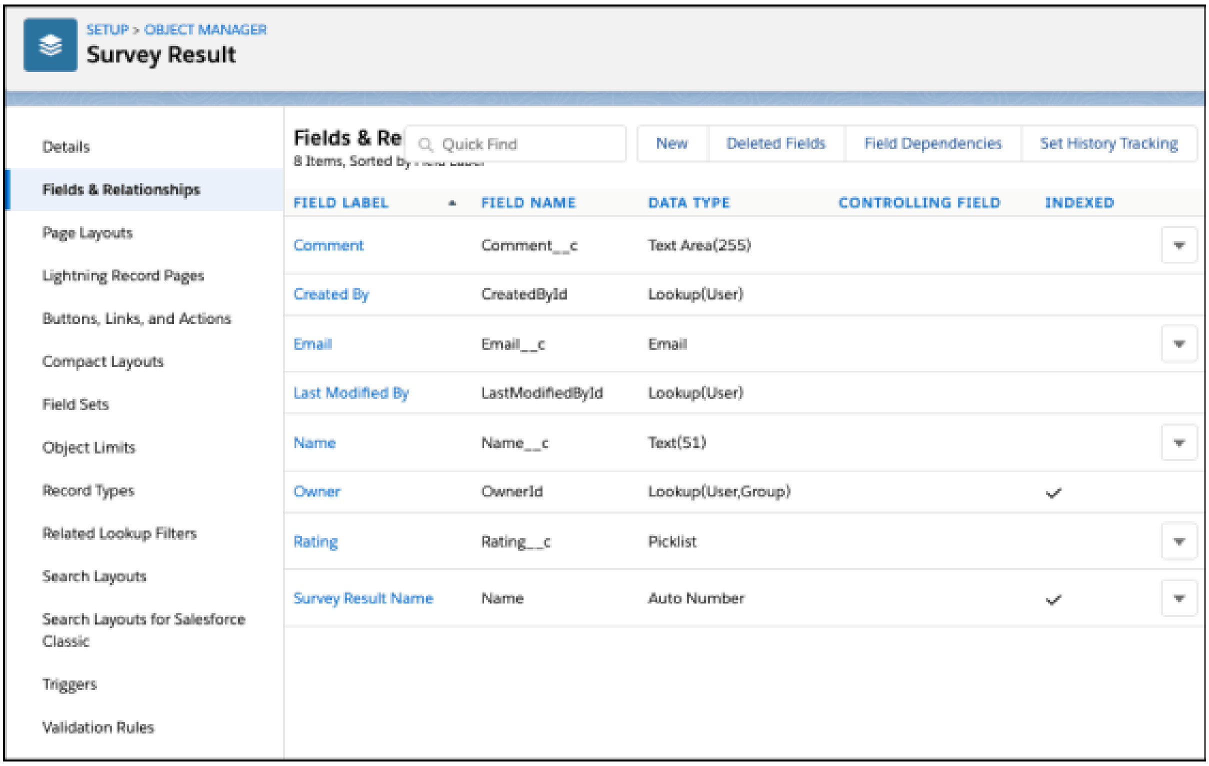
4.Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

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

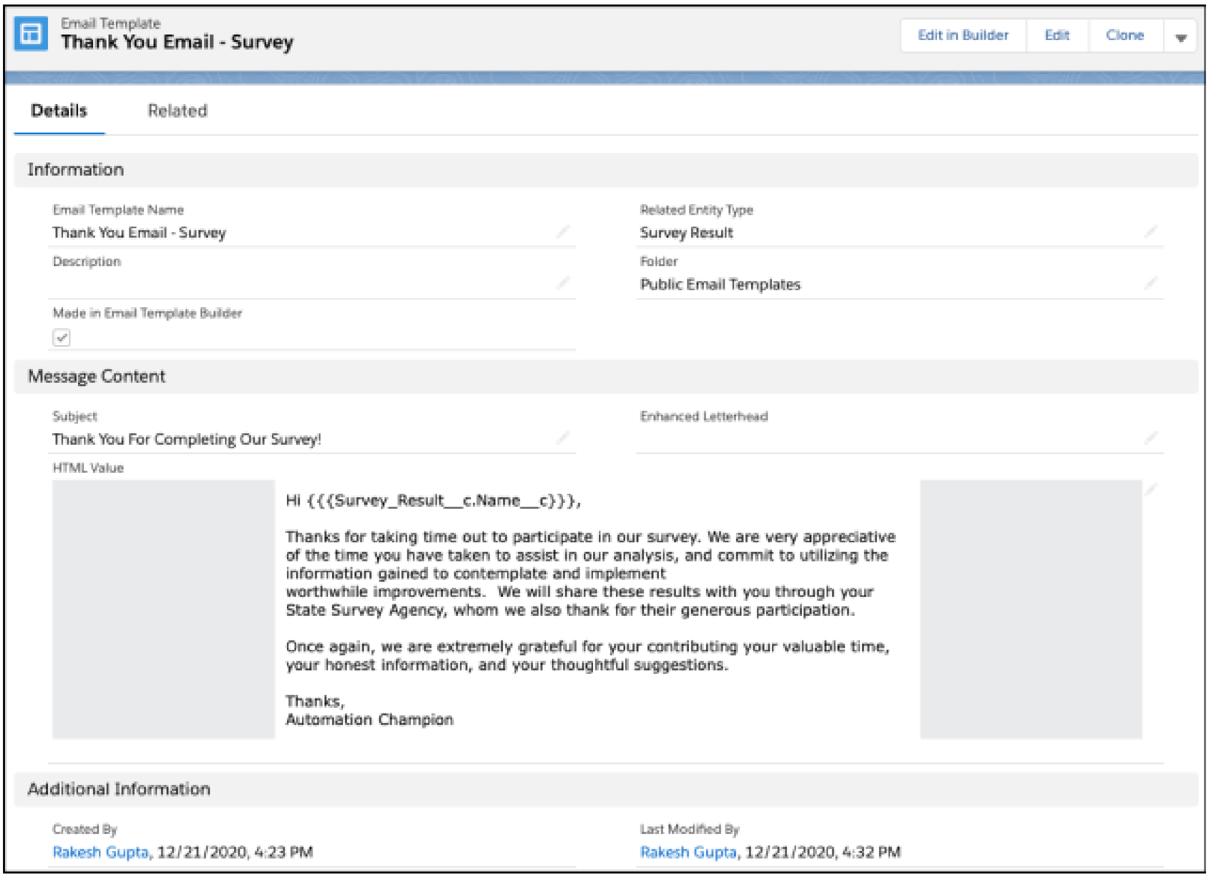
1. Click **Setup**.
2. In the Object Manager, click **Create | Custom Object**.
3. Now create a custom object **Survey Result** and fields as shown in the screenshot below:
4. Click **Save.**



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

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

screenshot.

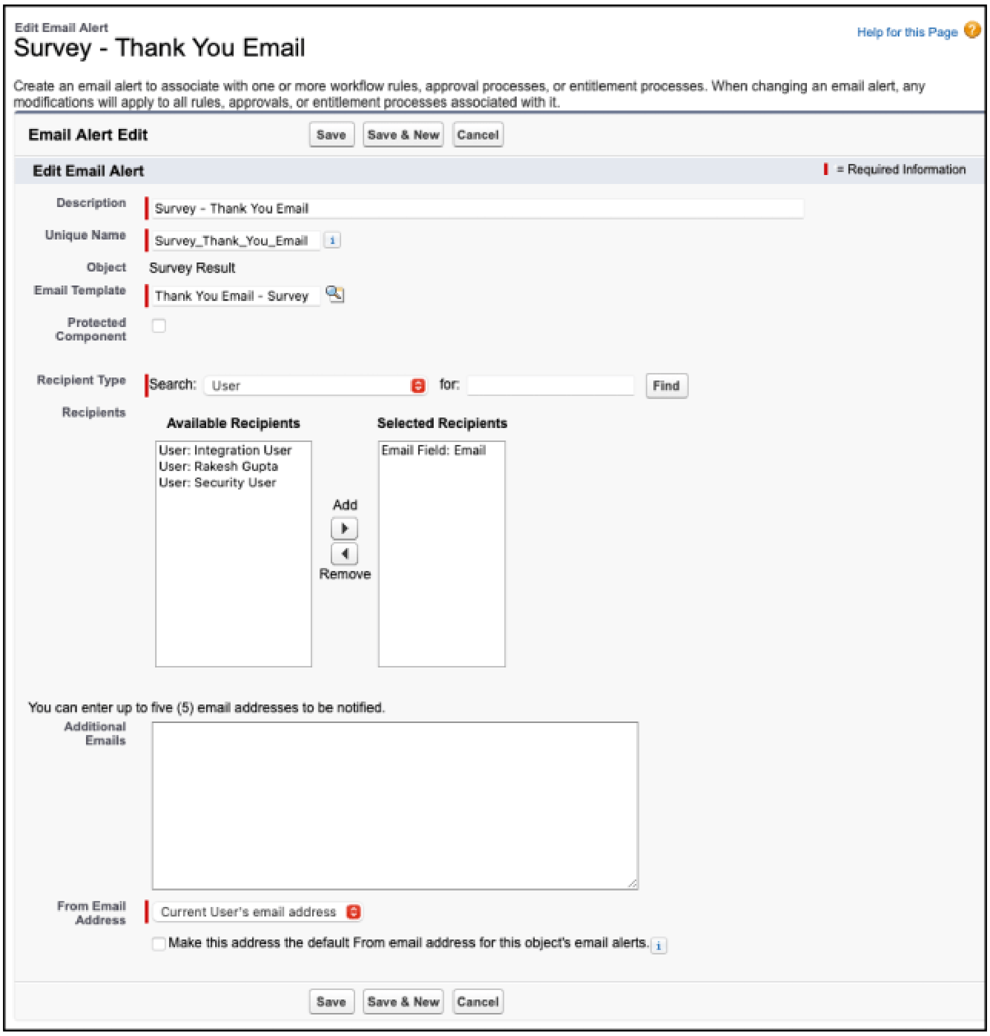


Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.
3. Select **Email Alerts**, click on the **New**

Email Alert button.

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



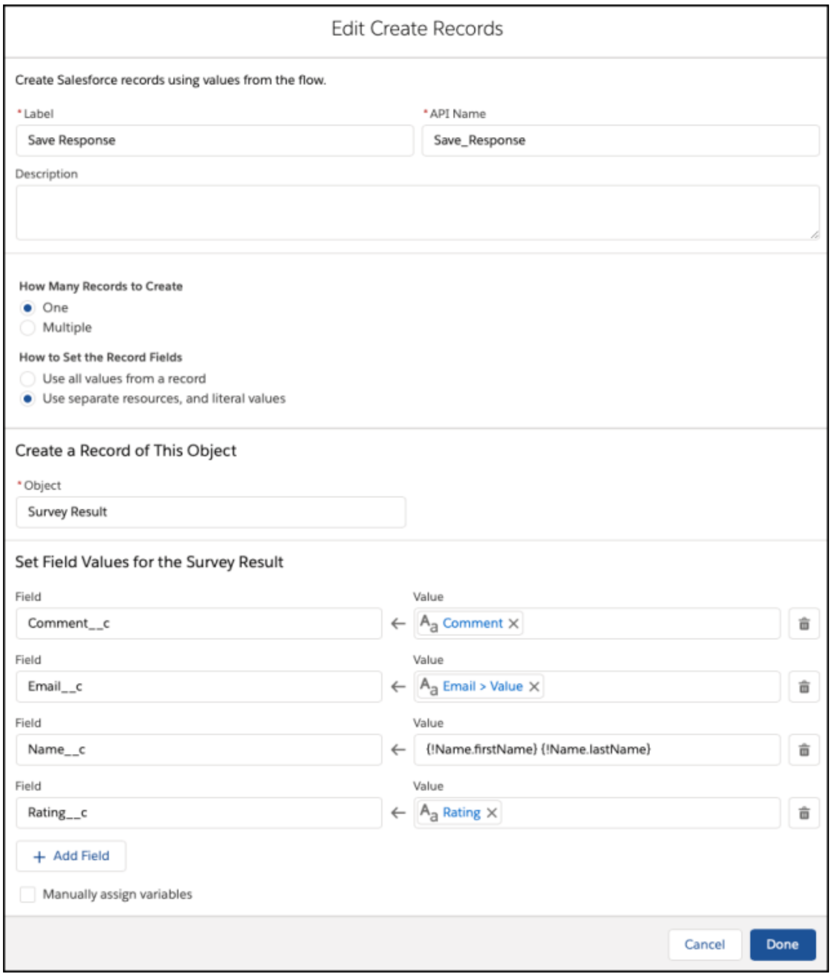
Step 4.1: Salesforce Flow — Create a Screen that Allow Users to Fill Survey

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

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

1. Drag-and-drop the **Create Records** element onto the Flow designer.
2. Enter a name in the **Label** (**Save Response**) field; the **API Name** will auto-populate.
3. For **How Many Records to Create** – select **One.**

4. For **How to Set the Record Fields – select Use separate resources, and literal values.**
5. Select the **Survey_Result__c** object from the dropdown list.
6. **Set Field Values for the Survey Result**
    1. Row 1:
        1. **Field: Comment__c**
        2. **Value: {!Comment}**
    2. Click **Add Row**
    3. Row 2:
        1. **Field: Email__c**
        2. **Value: {!Email.value}**
    4. Click **Add Row**
    5. Row 3:
        1. **Field: Name__c**
        2. **Value: {!Name.firstName} {!Name.lastName}**
    6. Click **Add Row**
    7. Row 3:
        1. **Field: Rating__c**
        2. **Value: {!Rating}**
7. Click **Done**.

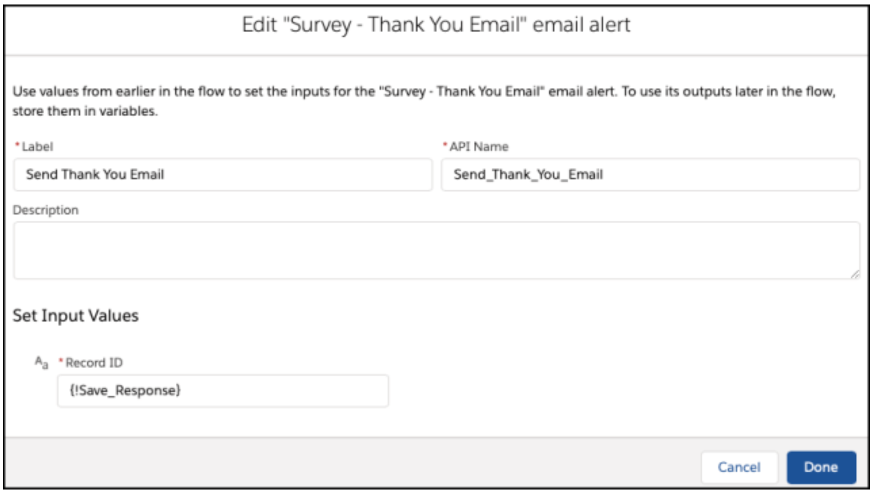


Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

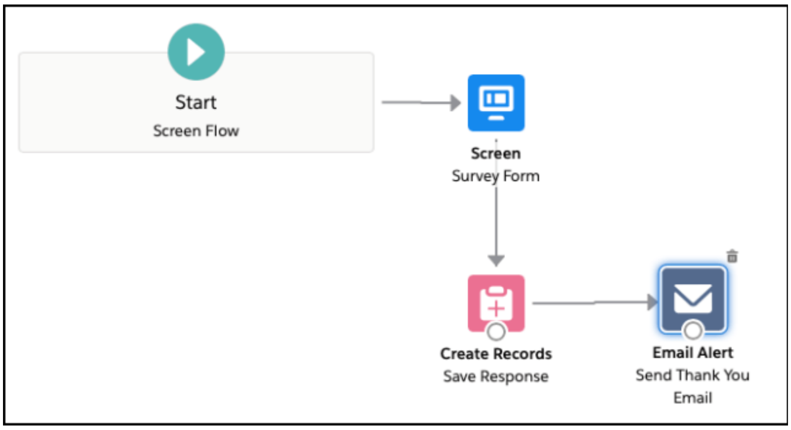
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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

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



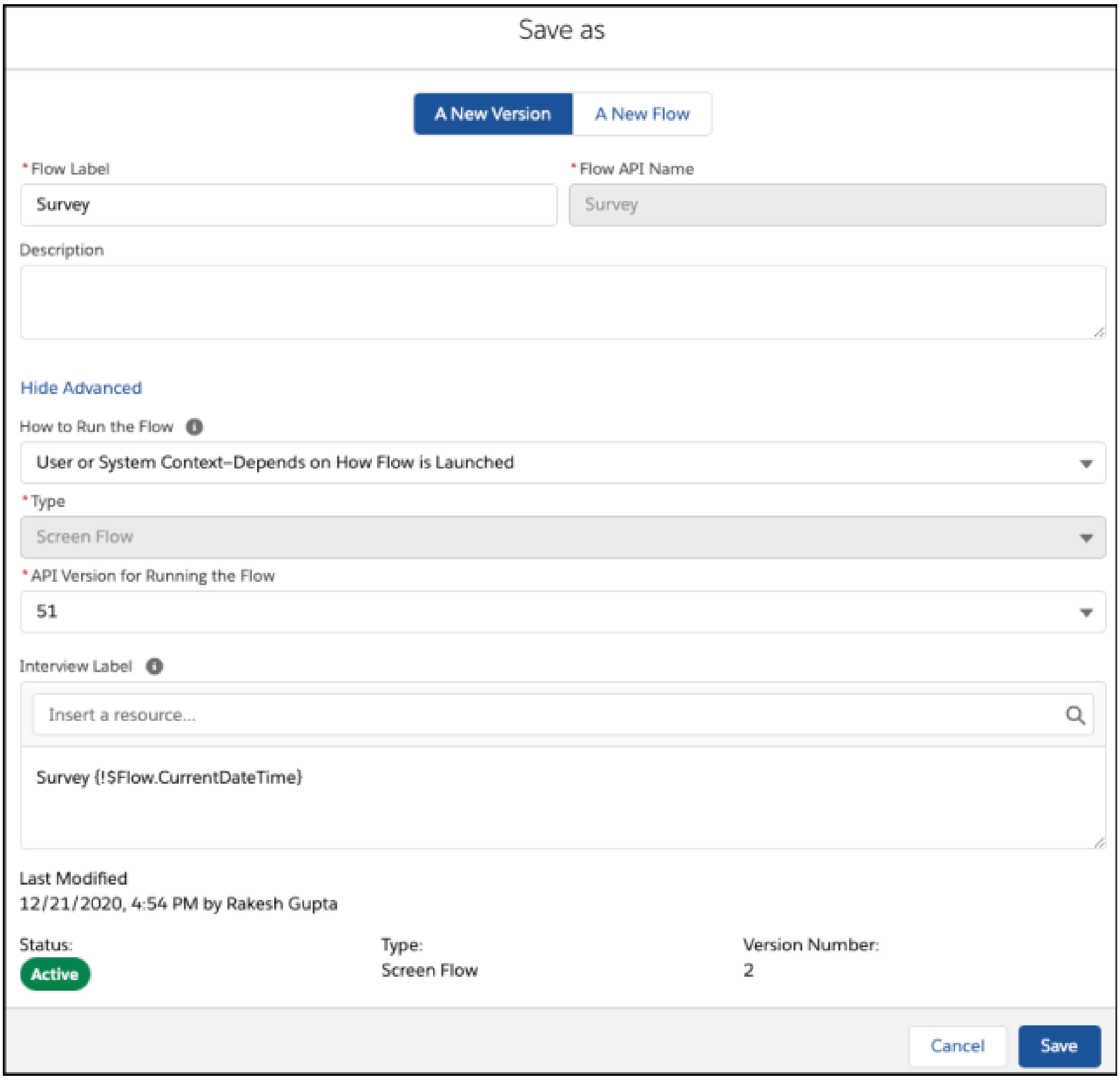
In the end, Sergio's **Flow** will look like the following screenshot:



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

Launched

5. **Type: Screen Flow**
6. **API Version for Running the Flow: 51**
7. **Interview Label: Survey {!$Flow.CurrentDateTime}**
8. Click **Save**.

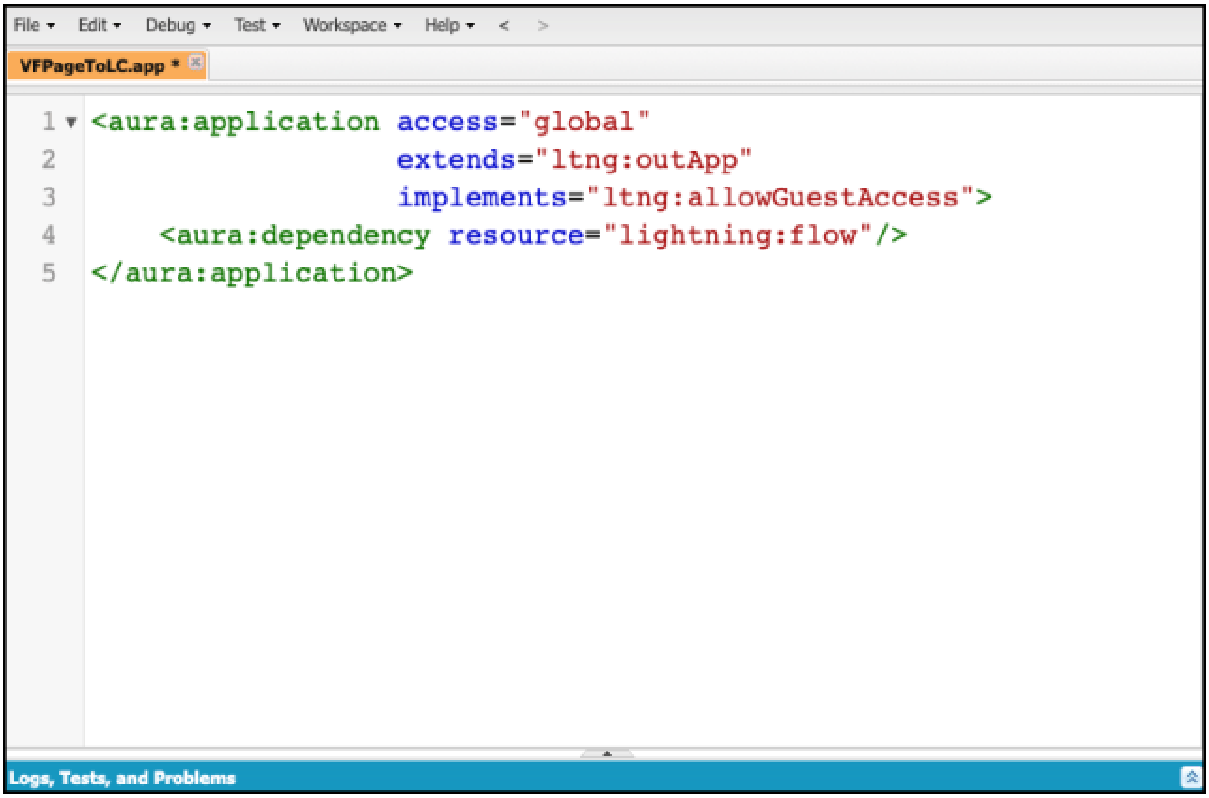


Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a

Visualforce Page

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

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

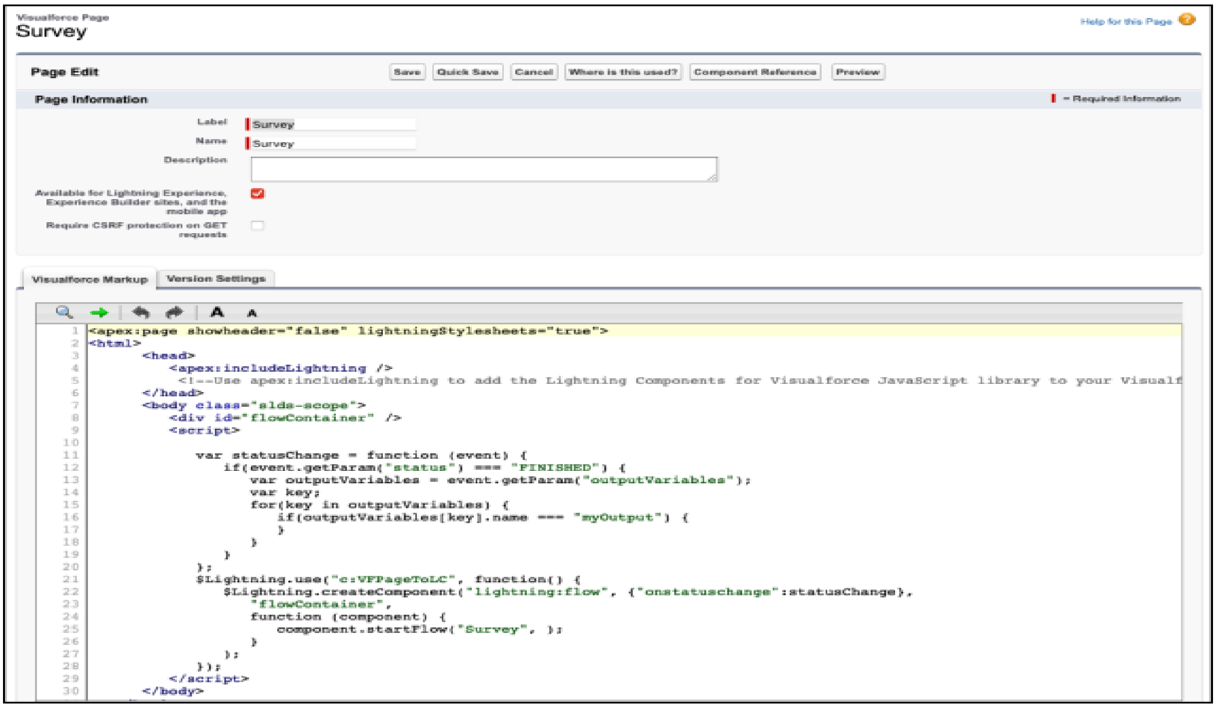


Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

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

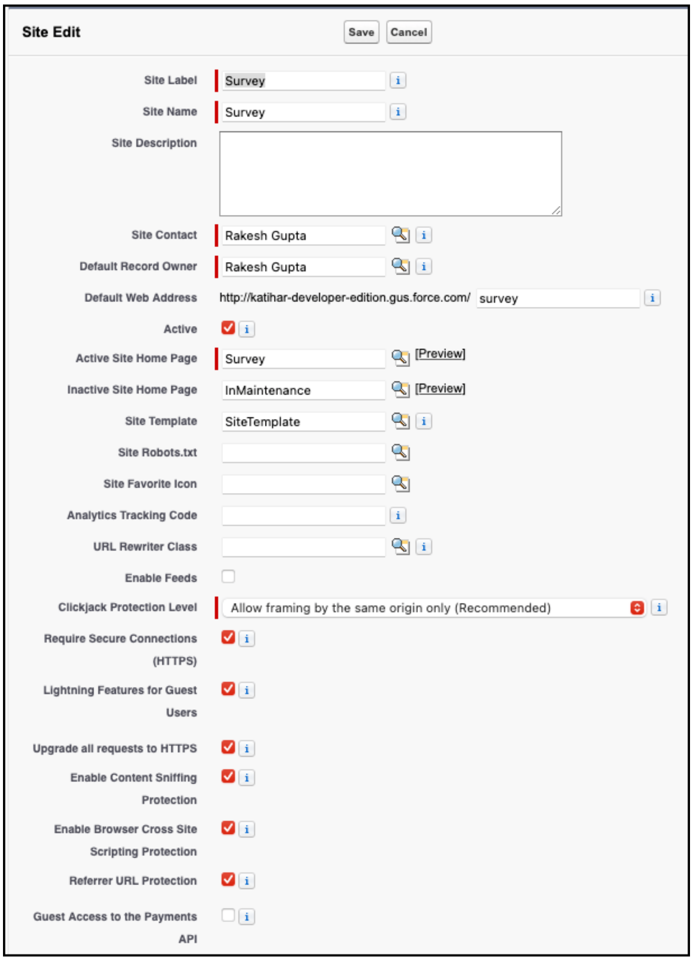
1. Click **Setup**.
2. In the Quick Find box, type **Visualforce Pages**.
3. Clicks on the **New** button.
4. Copy code from <u>**GitHub**</u> and paste it into your visualforce page
5. Click **Save.**



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

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

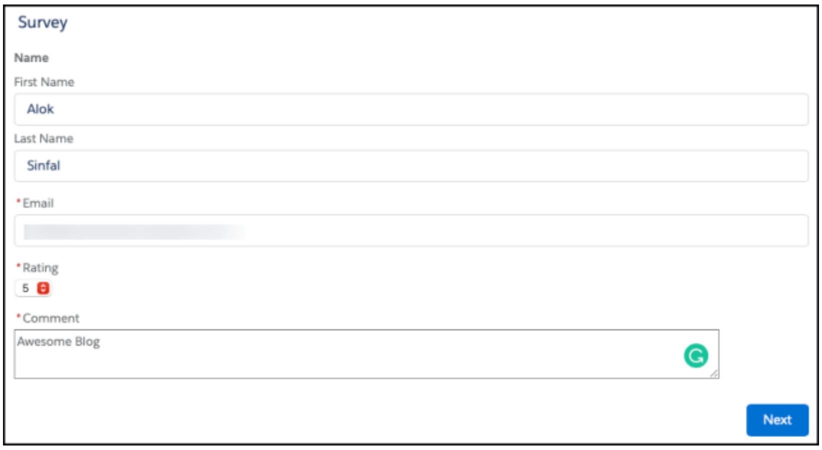
1. Click **Setup**.
2. In the Quick Find box, type **Sites**.
3. Clicks on the **New** button.
4. Fill the details as per the screenshot below:
5. Click **Save.**



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

Proof of Concept

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



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