

# Naan Mudhalvan

## Salesforce

### Developer(Course)

### Assignment no 1

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Zone no : Zone 8



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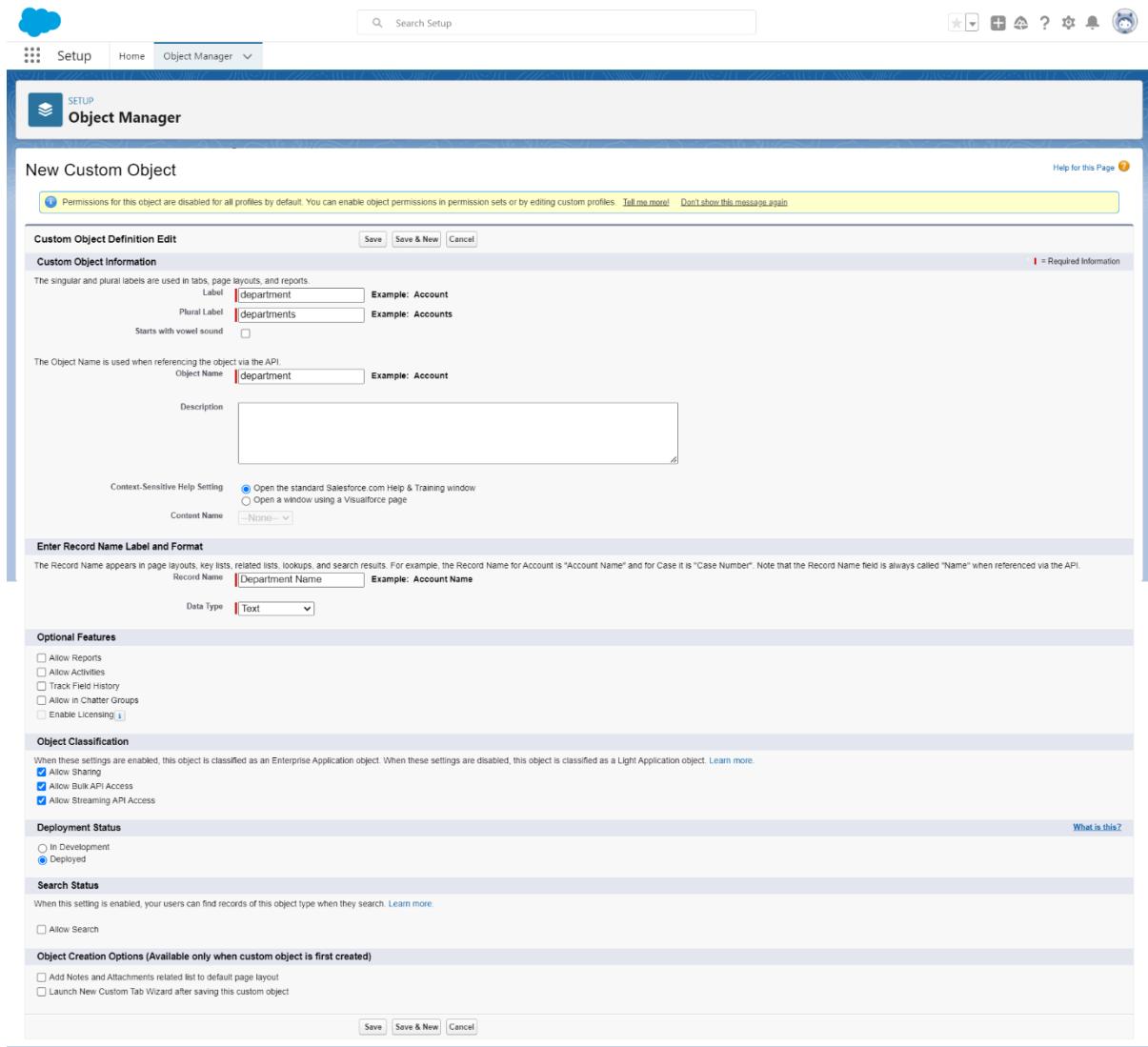
The screenshot shows the Salesforce Setup interface with the following details:

- 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: Custom Object Definition Edit**
  - Custom Object Information:**
    - The singular and plural labels are used in tabs, page layouts, and reports.
    - Label:** college (Example: Account)
    - Plural Label:** colleges (Example: Accounts)
    - Starts with vowel sound:**
  - The Object Name is used when referencing the object via the API.
  - Object Name:** college (Example: Account)
  - Description:** (Large text area)
  - Context-Sensitive Help Setting:**
    - Open the standard Salesforce.com Help & Training window
    - Open a window using a Visualforce page
  - Content Name:** --None--
- Section: Enter Record Name Label and Format**
  - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
  - Record Name:** college Name (Example: Account Name)
  - Data Type:** Text
- Section: Optional Features**
  - Allow Reports
  - Allow Activities
  - Track Field History
  - Allow in Chatter Groups
  - Enable Licensing
- Section: Object Classification**
  - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).
  - Allow Sharing
  - Allow Bulk API Access
  - Allow Streaming API Access
- Section: Deployment Status**
  - In Development
  - Deployed
- Section: Search Status**
  - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).
  - Allow Search
- Section: Object Creation Options (Available only when custom object is first created)**
  - Add Notes and Attachments related list to default page layout
  - Launch New Custom Tab Wizard after saving this custom object

# 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'. It shows a dropdown menu set to 'college'. Navigation buttons at the top right include 'Help for this Page', '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 this field type is provided, mentioning it creates a relationship that links the object to another object and 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. Navigation buttons at the top right include 'Help for this Page', 'Step 1', '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

Details

**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

User Interface

Rename Tabs and Labels

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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The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being created is 'college'. The field name is 'Total count'.

**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.

Help for this Page

Step 5 of 5

Previous Save & New Save Cancel

The screenshot shows the Salesforce Setup interface for establishing field-level security for the 'Total count' field. Step 4 of 5 is shown.

**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"/>

Help for this Page

Step 4 of 5

Previous Next Cancel



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The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being configured is 'college'. The left sidebar lists various setup categories under 'Fields & Relationships'. The main panel is titled 'New Custom Field' and is currently on 'Step 3. Define the summary calculation'.  
In this step, the user is selecting the 'Object to Summarize' as 'college' and the 'Summarized Object' as 'CDepartments'. The 'Roll-Up Type' is set to 'COUNT'. The 'Filter Criteria' section has the option 'All records should be included in the calculation' selected. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface continuing the creation of a new custom field. The object is still 'college'. The left sidebar remains the same. The main panel is now on 'Step 2. Enter the details'.  
The user has entered the following details:

- Field Label: 'Total count'
- Field Name: 'Total\_count'
- Description: (empty)
- Help Text: (empty)

A checkbox 'Auto add to custom report type' is checked, and another checkbox 'Add this field to existing custom report types that contain this entity' is also checked. Navigation buttons at the bottom right include '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.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
  - 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.
- Master-Detail Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- 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-
-------------------------	--------

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

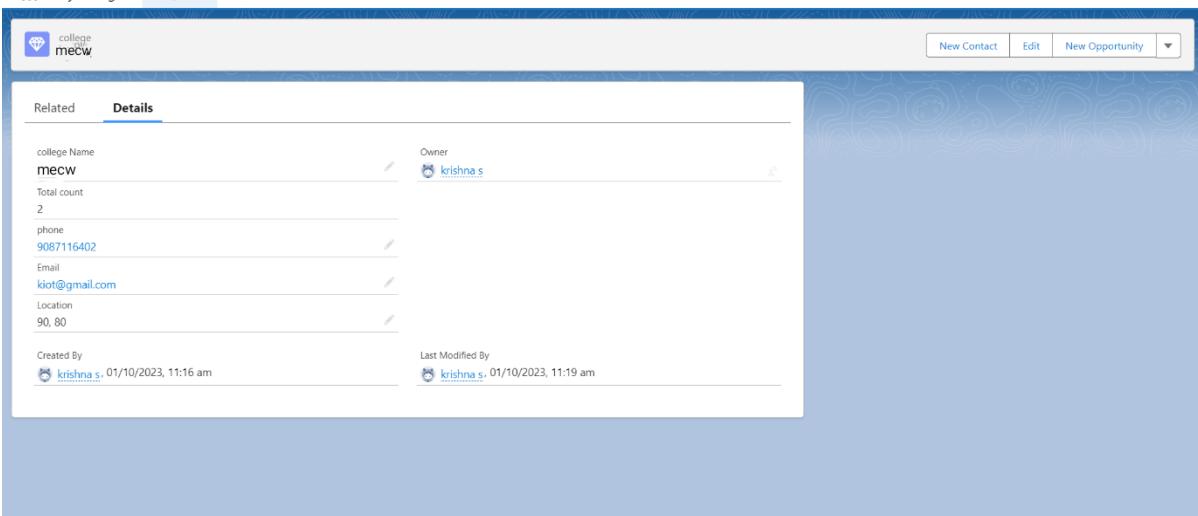
Location  
90, 80

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

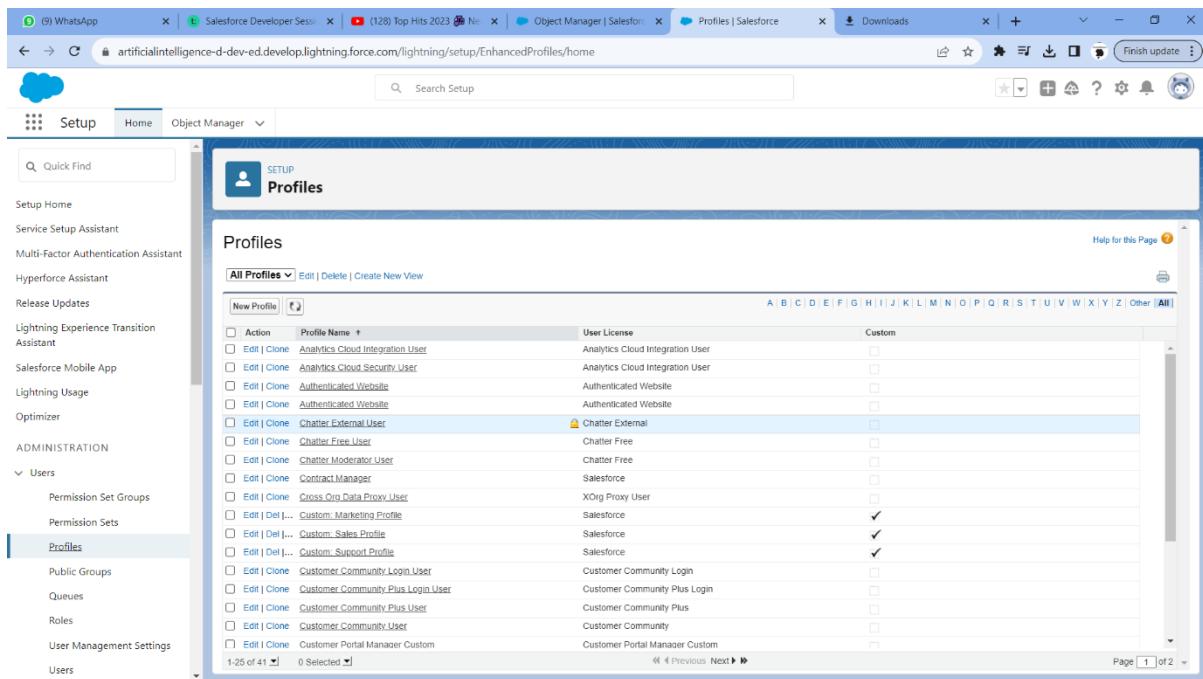


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2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

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 with the 'Profiles' tab selected. On the left, the navigation menu is expanded to show the 'Profiles' section under 'Users'. The main content area displays the 'Clone Profile' screen, which prompts the user to enter the name of the new profile and select an existing profile to clone from. The 'Existing Profile' dropdown is set to 'Standard Platform User', and the 'User License' dropdown is set to 'Salesforce Platform'. The 'Profile Name' input field contains 'Manager'. Below the form are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. On the left, the navigation menu is expanded to show the 'Profiles' section under 'Users'. The main content area displays the 'Profile Manager' screen, which lists the details of the 'Manager' profile. The 'Profile Detail' section shows the profile's name ('Manager'), user license ('Salesforce Platform'), and creation date ('Created By: SALESFORGE 01/10/2023, 7:09 pm'). The 'Modified By' field is also visible. The 'Page Layouts' section lists various standard object layouts for the 'Manager' profile, such as 'Global' (for Account, Lead, Opportunity, etc.), 'Email Application' (for Contact, Lead, etc.), 'Home Page Layout' (for Home Page Default), 'Appointment' (for Appointment, Case, etc.), and 'Alternative Payment Method' (for Alternative Payment Method Layout). Each layout entry includes fields for 'Name', 'Order', 'Under Product', 'Payment', 'Payment Authorization', and 'Payment Gateway'.



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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, Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users), and a search bar labeled "Quick Find".

The main content area is titled "Profiles" and "Manager". It displays the "Profile Edit" form for the "Manager" profile. The "Name" field is set to "Manager", "User License" is "Salesforce Platform", and "Description" is empty. A "Custom Profile" checkbox is checked. The "Custom App Settings" section shows settings for various apps like Analytics Studio, App Launcher, and kiot. The "Service Provider Access" section shows tab settings for Home, Accounts, Alert Settings, Learning, Libraries, and Lightning Bolt Solutions.

This screenshot shows the same Salesforce Setup Manager - Profiles screen as the previous one, but with different sections visible. 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 checkboxes for selection. The "Custom Object Permissions" section shows permissions for "Bank" and "customers" objects across basic and data administration operations. The "Session Settings" section includes "Session Times Out After" (set to "2 hours of inactivity"), "Session Security Level Required at Login" (set to "None"), and "Password Policies" (set to "User passwords expire in 90 days, Enforce password history 3 passwords remembered, Minimum password length 8").



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The screenshot shows the Salesforce Setup interface under the Profiles tab. 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 two tables for Custom Object Permissions: one for the Bank object and another for the customers object. The Bank table shows permissions for Read, Create, Edit, Delete, View All, and Modify All. The customers table shows similar permissions. Under Session Settings, the session times out after 2 hours of inactivity and requires no security level at login. The Password Policies section defines the following requirements:

- 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

This screenshot is identical to the one above, showing the Salesforce Profiles setup page. The sidebar and main content area are the same, displaying the Profiles configuration screen with its various sections and settings. The password policies are also identical, defining the same set of requirements for user password management.



Edit with WPS Office

**Custom Object Permissions**

	Bank	customers	Enhancement Requests	
	Basic Access	Data Administration	Basic Access	Data Administration
Read	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Modify All	<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
<a href="#">Edit</a>   <a href="#">Login</a>	Antonia Dilya	dadan	test_dilya_pas_4e6b9b79wtk_tszrgqabkox_3q8cf0yzwms_h43tkzy6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LJMS User
<a href="#">Edit</a>	Chatter Export	Chatter	chatty_00d5000000cskskeah_lo0hfemprjka@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>   <a href="#">Login</a>	Ellington Amelia	aelli	amelia.ellington.1.46kxcpkoodin6scyndcu4wh_hnbdlwmvyrho_wguctorlaly@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	S_GOPAL	GS	kot120@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	User_Integration	integ	integration@000500000bcaskeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	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 with checkboxes, and the "User License" section also has checkboxes. A "Sharing" tab is visible at the top.

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. The footer of the email includes 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

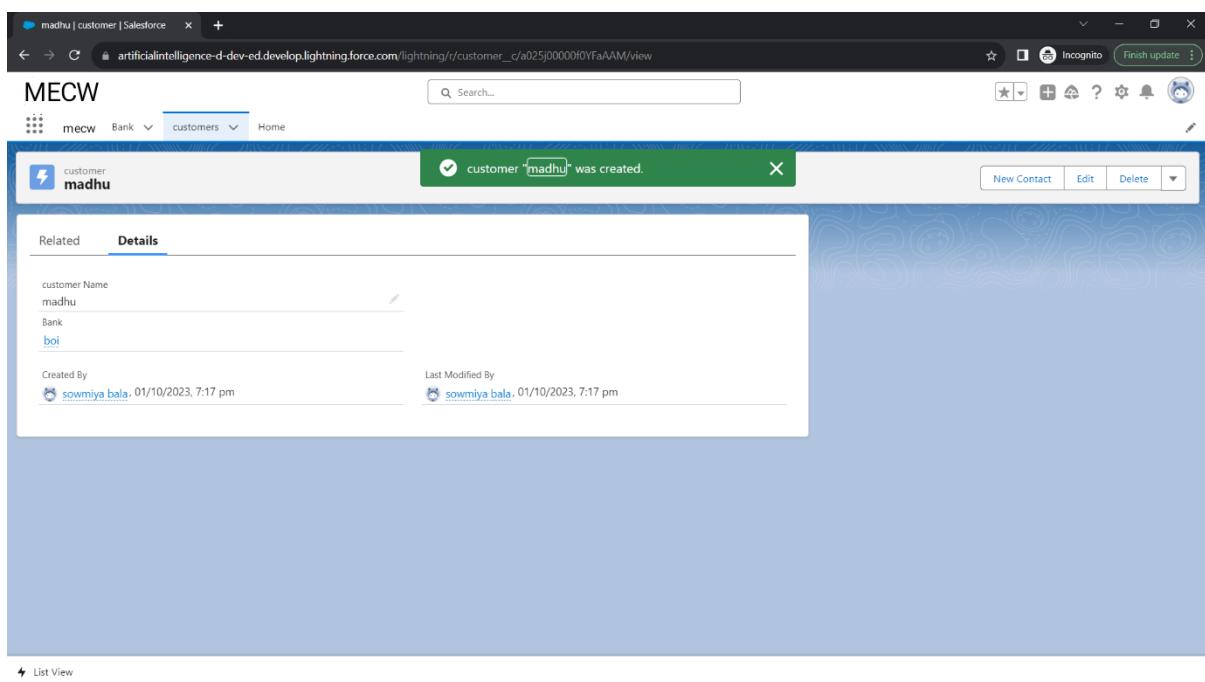
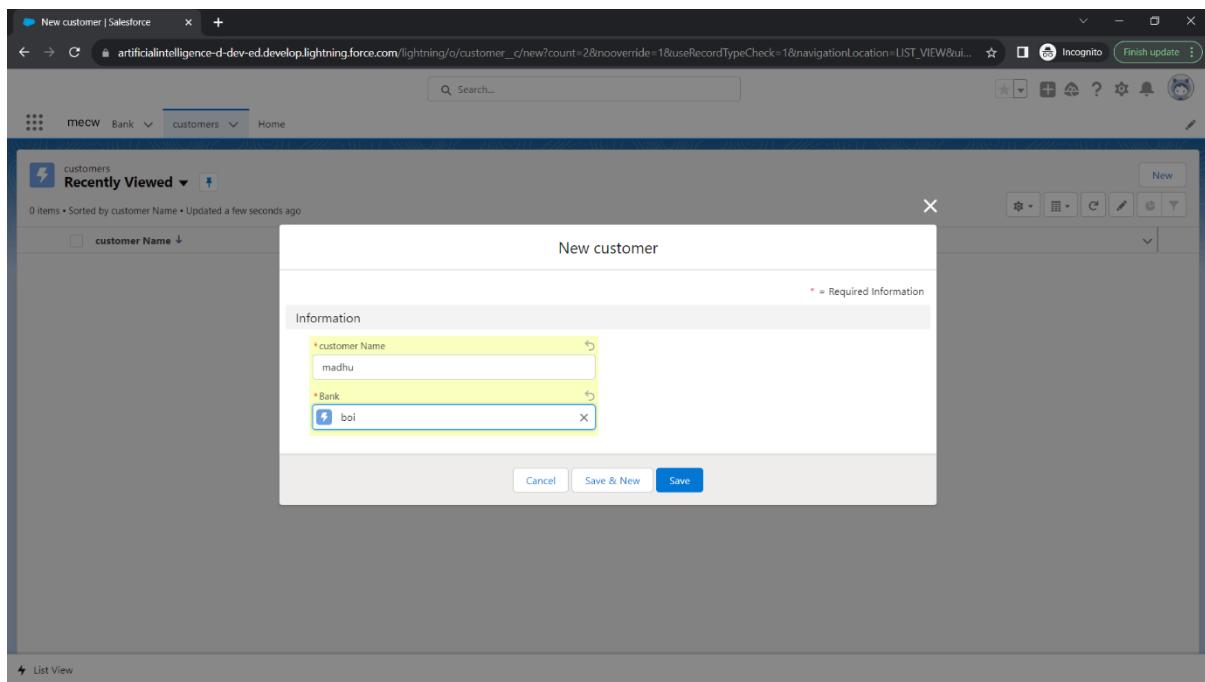
Owner: sowmiya bala

phoneno: 0897754534

Cancel Save & New Save



Edit with WPS Office



Edit with WPS Office

The screenshot shows the Salesforce Setup Profiles page. The left sidebar is titled "Setup" and includes sections for "Users" (selected), "Permission Set Groups", "Permission Sets", "Profiles" (selected), "Public Groups", "Queues", "Roles", and "User Management Settings". The main content area is titled "Profiles" and shows a table of profiles. The table has columns for "Action", "Profile Name", "User License", and "Custom". The "User License" column contains "Salesforce Integration", "Salesforce", "Silver Partner", "Solution Manager", "Salesforce Platform", "Standard User", and "System Administrator". The "Custom" column has a checked checkbox next to "Salesforce". A navigation bar at the bottom indicates "1 of 7" and "0 Selected".

The screenshot shows the Salesforce Setup Clone Profile page. The left sidebar is identical to the previous one. The main content area is titled "Clone Profile" and contains the message "Enter the name of the new profile." Below this, a note says "You must select an existing profile to clone from." A table shows the "Existing Profile" as "Standard Platform User", "User License" as "Salesforce Platform", and "Profile Name" as "salesmanager". There are "Save" and "Cancel" buttons at the bottom.



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, Order, Product, Payment, and Case), 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:

**Buttons**

Save | Save & New | Cancel



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 is being created with the following details:

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	

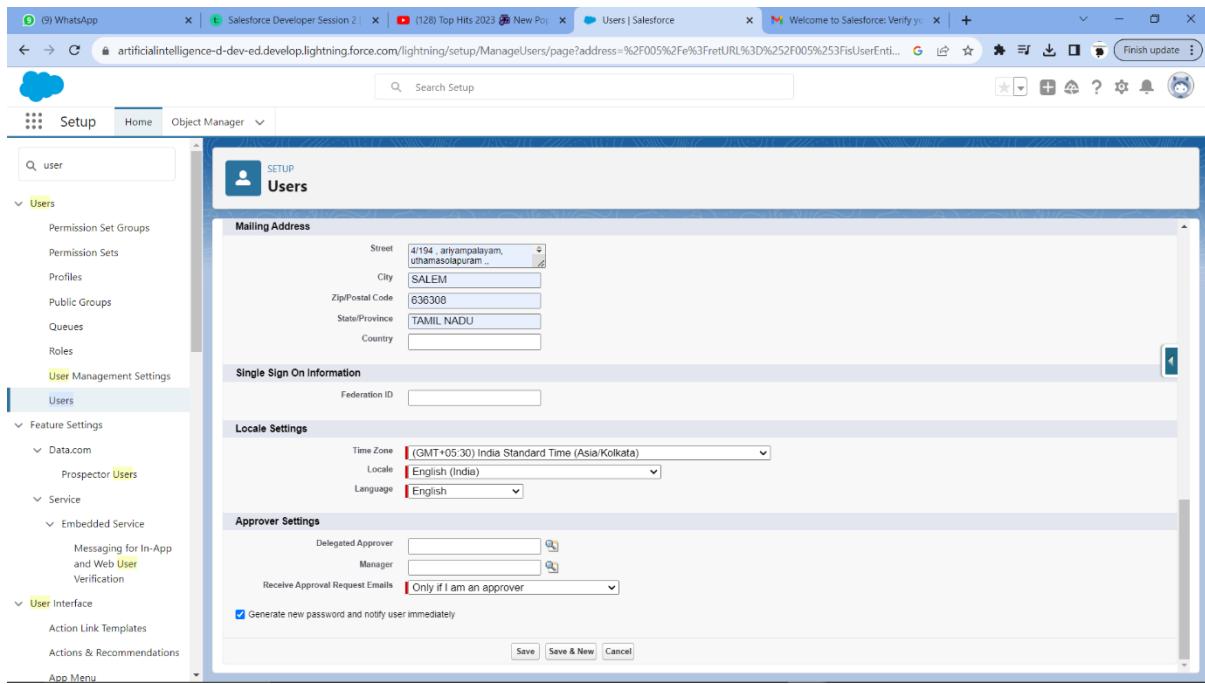
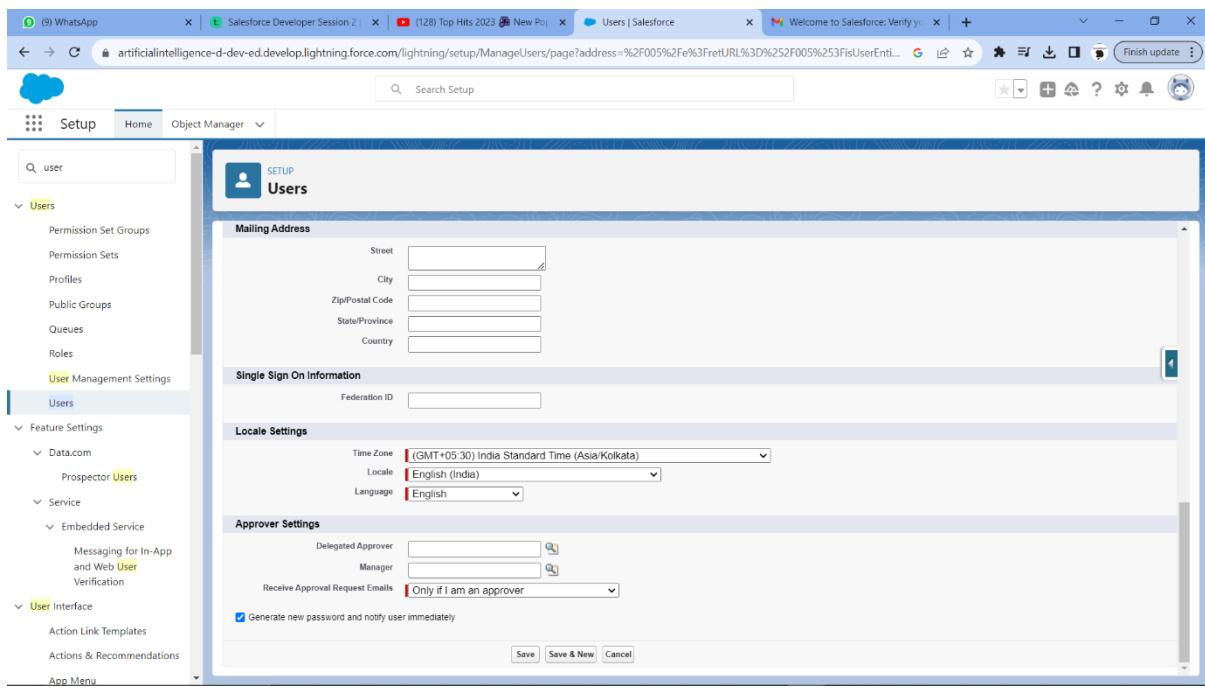
Other settings include:

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

This screenshot is identical to the one above, except the 'Profile' dropdown has been changed to 'salesmanage'. All other fields and settings remain the same.



Edit with WPS Office



Edit with WPS Office

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with various categories like Permission Set Groups, Profiles, Public Groups, Roles, and User Management Settings. Under User Management Settings, 'Users' is selected. The main area displays a user record for 'madhu b'. The user 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 shows 'Salesforce Platform Profile' assigned as 'salesmanager'. 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 sidebar includes options for Mail, Chat, Spaces, and Meet. The inbox has 5,318 messages. A prominent message from Salesforce is displayed, titled 'Welcome to Salesforce!'. It contains a 'Verify Account' button and a URL: <https://artificialintelligence-d-dev-ed-develop.my.salesforce.com>. Below the URL, it says 'Again, welcome to Salesforce!'. At the bottom of the message, there's a note: '© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.' and '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

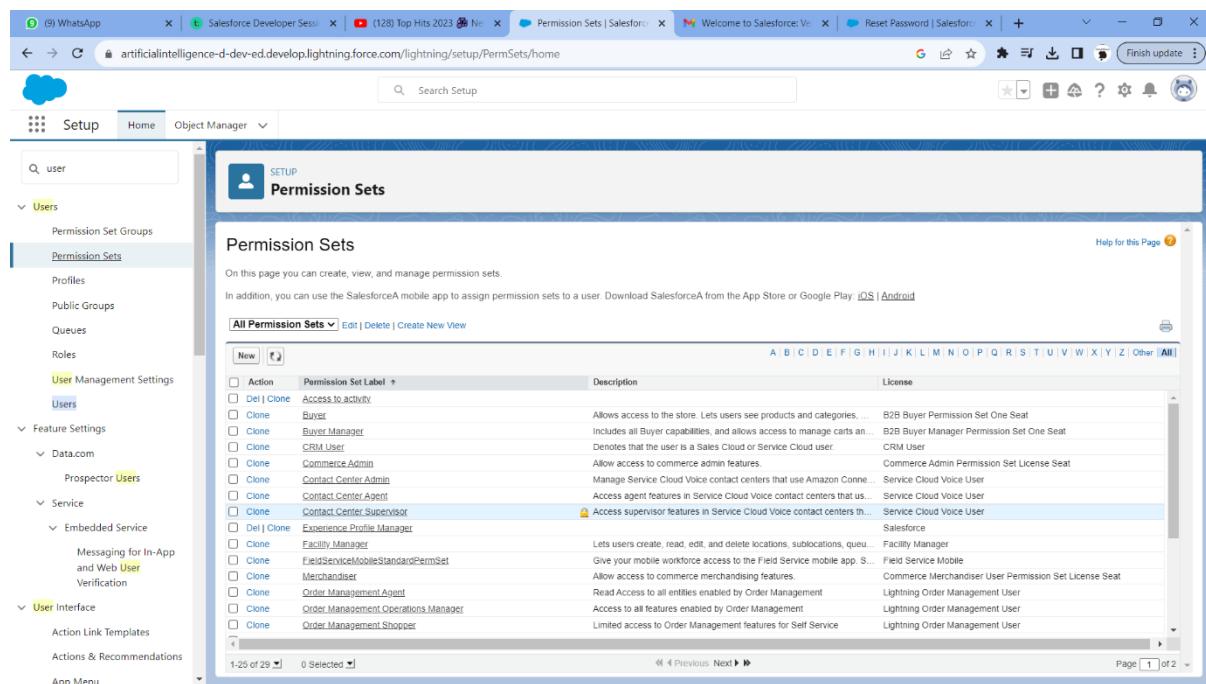
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## 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", "Action Link Templates", "Actions & Recommendations", and "App Menu".
- Top Bar:** Includes tabs for "WhatsApp", "Salesforce Developer Session", "Top Hits 2023", "Permission Sets | Salesforce", "Welcome to Salesforce", "Reset Password | Salesforce", and "Finish update".
- Content Area:** Displays the "Permission Sets" page for the "salesmanager" permission set. It shows the "Permission Set Overview" with the following details:
  - API Name:** salesmanager
  - Namespace Prefix:** GOPAL\_S
  - Created By:** GOPAL\_S (01/10/2023, 7:29 pm)
  - Description:** (empty)
  - License:** (empty)
  - Session Activation Required:** (checkbox)
  - Last Modified By:** GOPAL\_S (01/10/2023, 7:29 pm)
- Bottom Panel:** Shows 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", "Action Link Templates", and "Actions & Recommendations".
- Top Bar:** Includes tabs for "WhatsApp", "Salesforce Developer Session", "Top Hits 2023", "Permission Sets | Salesforce", "Welcome to Salesforce", "Reset Password | Salesforce", and "Finish update".
- Content Area:** Displays the "Permission Sets" page for the "salesmanager" permission set. It shows the "Permission Set Overview" and then switches to the "Object Settings" tab.
- Table:** Shows object settings for various Salesforce objects:
 

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" permission is checked for the "Bank" object. The URL in the browser is <https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%3Fs%3DEntityPermissions%26o%3D...>.

The screenshot shows the same Salesforce setup interface after changes have been made. The "Read" permission for the "Bank" object in the "Object Permissions" section is now checked. The URL in the browser is <https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%2Fe%3Fs%3DEntityPermissions%26o...>.



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. Several users are listed, each with a checkbox next to their name. One user, 'madhu b', has a checked checkbox. At the bottom right of the dialog box is a 'Next' button.

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.tszrgsbkxpx.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	



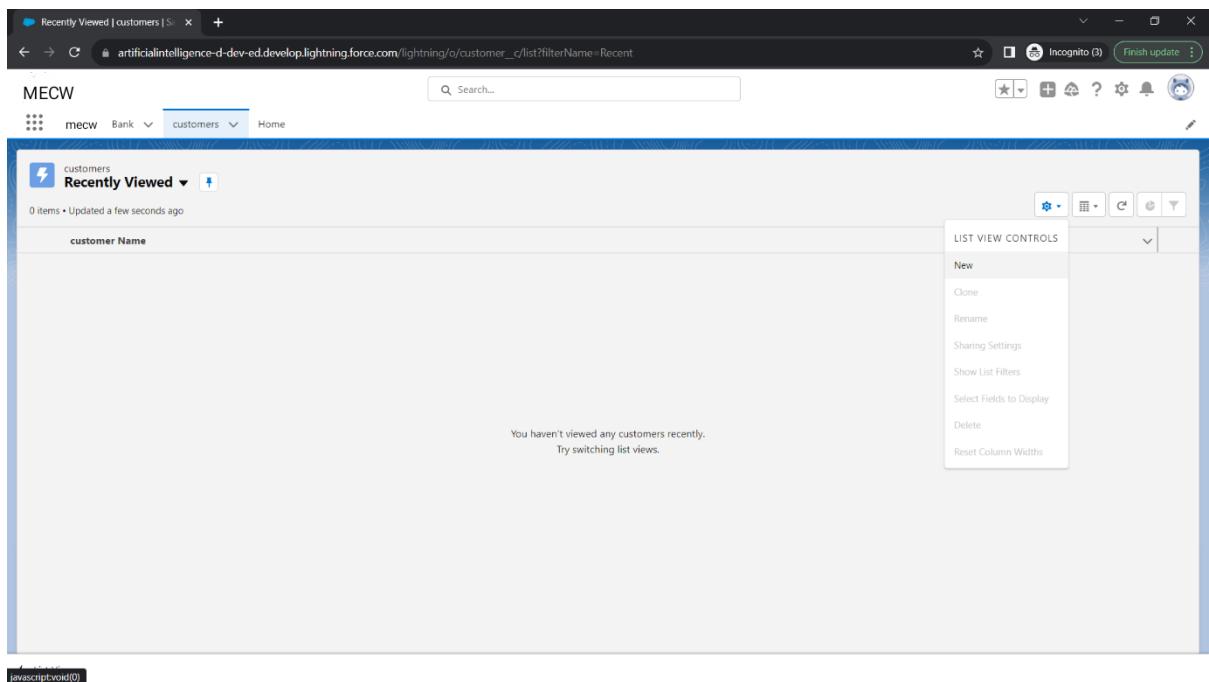
Edit with WPS Office

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing categories like User Management Settings, User Interface, and Feature Settings. The 'User Management Settings' section is currently selected, with 'Users' highlighted. The main content area displays a dialog titled 'Select an Expiration Option For Assigned Users'. It contains two radio button options: 'No expiration date' (selected) and 'Specify the expiration date'. Below this are buttons for '1 Day', '1 Week', '30 Days', and '60 Days', followed by a 'Custom Date' field. A 'Time zone' dropdown is present, with the placeholder 'Select a time zone...'. A table titled 'Selected Users' lists one user, 'madhu b', with details: Role 'salesmanager', Profile 'Salesforce Platform', Active status, and 'Expires On' set to 'Never Expires'. At the bottom right of the dialog are 'Cancel', 'Back', and 'Assign' buttons.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing categories like User Management Settings, User Interface, and Feature Settings. The 'User Management Settings' section is currently selected, with 'Users' highlighted. The main content area displays a success message: '1 assignments were successful.' above a 'PERMISSION SET SALESMANAGER' summary. The summary table has columns: Full Name, User License, Expires On, Time Zone, and Status. One row is listed: 'madhu b', 'Salesforce Platform', 'Never Expires', 'UTC-07:00 (Pacific Daylight)', and 'Success'. At the bottom right of the summary area is a 'Done' button.



Edit with WPS Office



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 has 'Users' selected under 'Profiles'. The main area displays a table of profiles with columns for Action, Profile Name, User License, and Status (Custom). The table includes rows for various standard and custom profiles like 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External', etc. A search bar at the top right says 'Search Setup'.

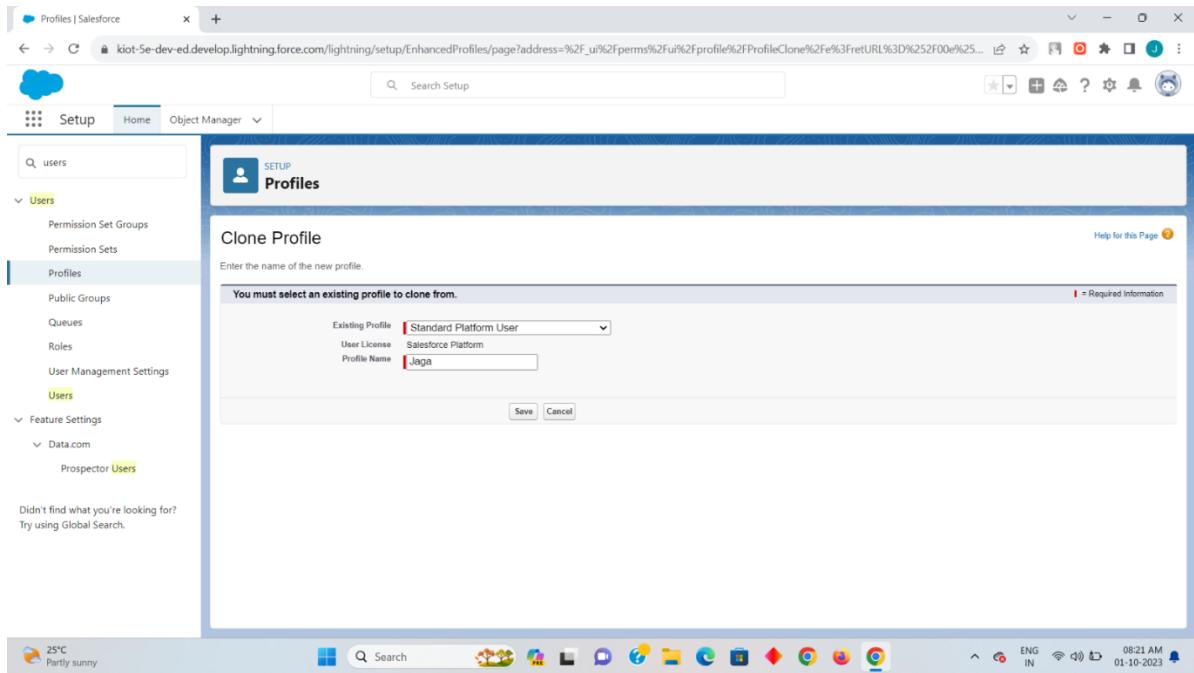
Action	Profile Name	User License	Status
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input 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   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"/>

## Step 2:

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



Edit with WPS Office



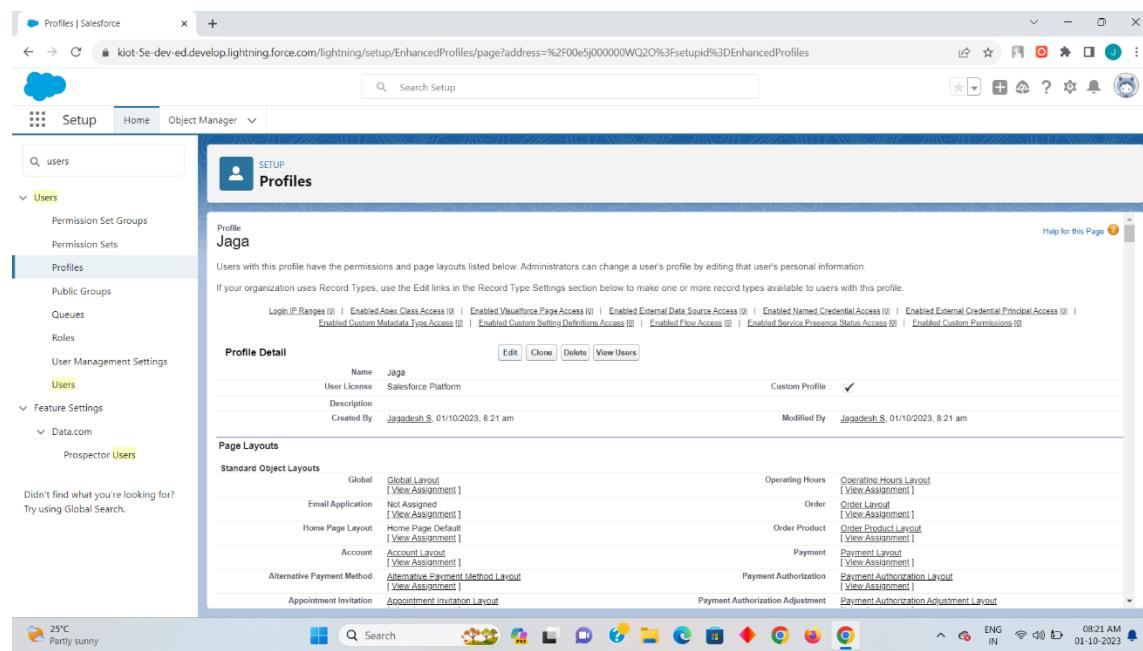
Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.



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.



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.

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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
- Prospector Users

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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.

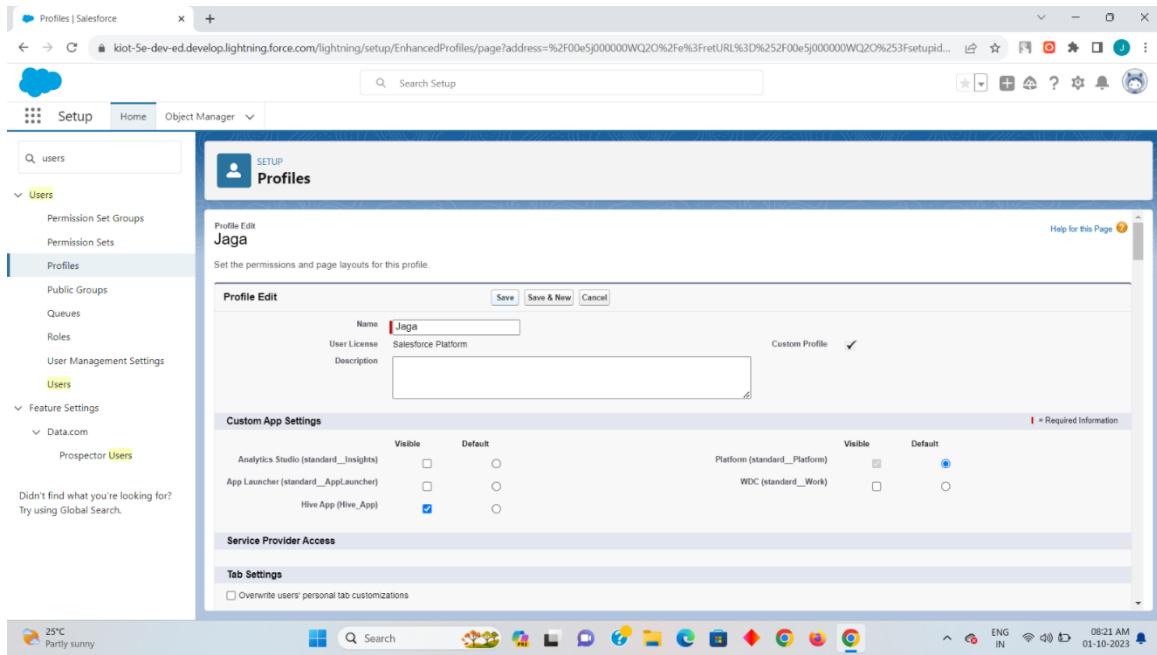
- Separate Experience Cloud site and Salesforce login authentication for employees.
- Relax login IP restrictions.
- Skip employee device activation during Experience Cloud site login.

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Edit with WPS Office

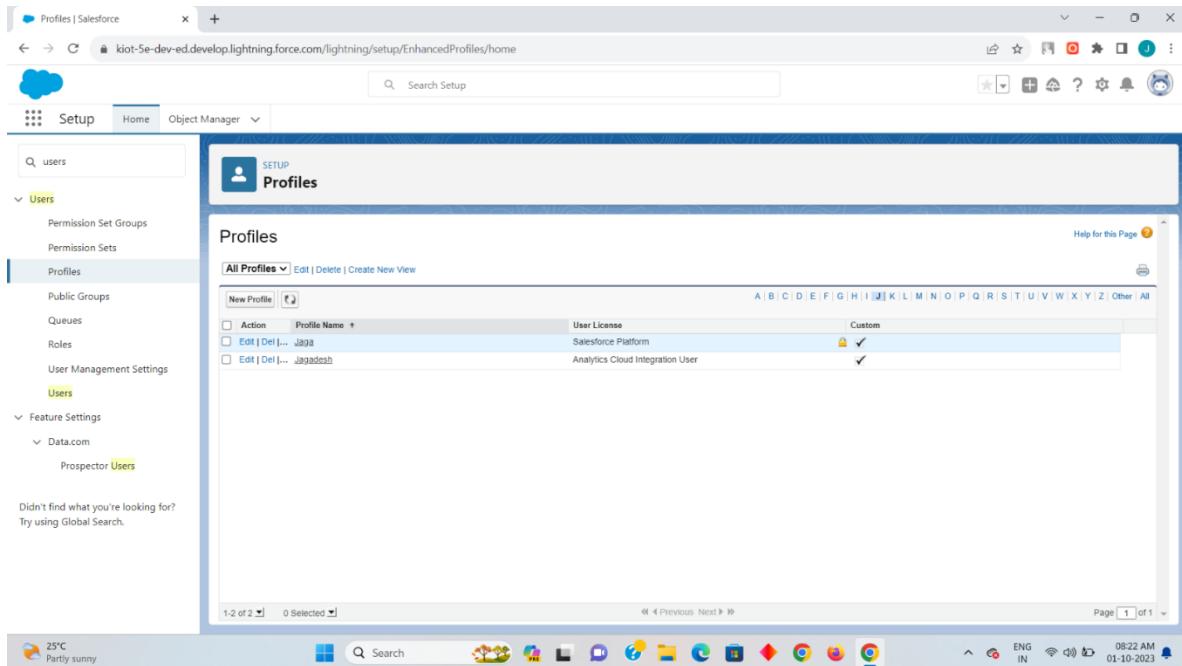


## Step 4

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



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## Step 5:

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



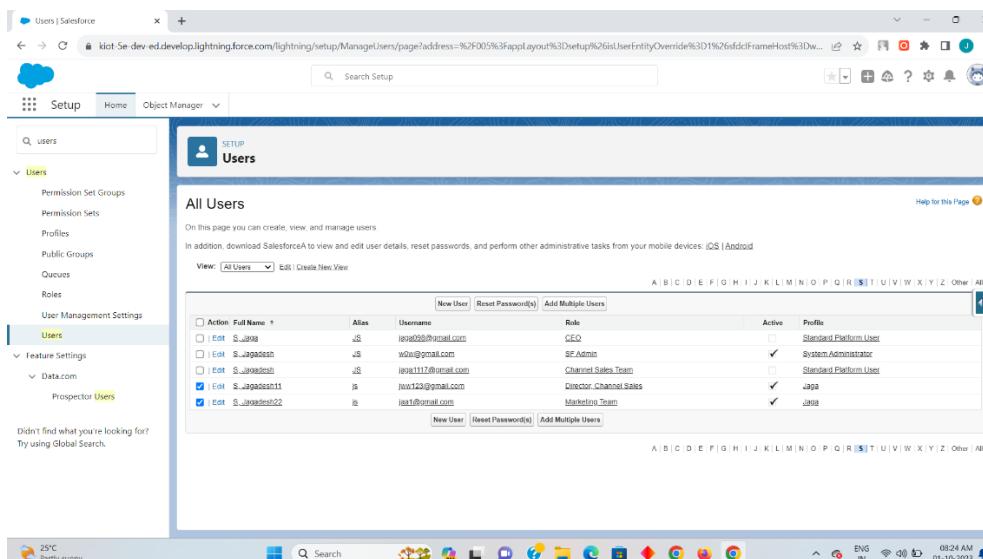
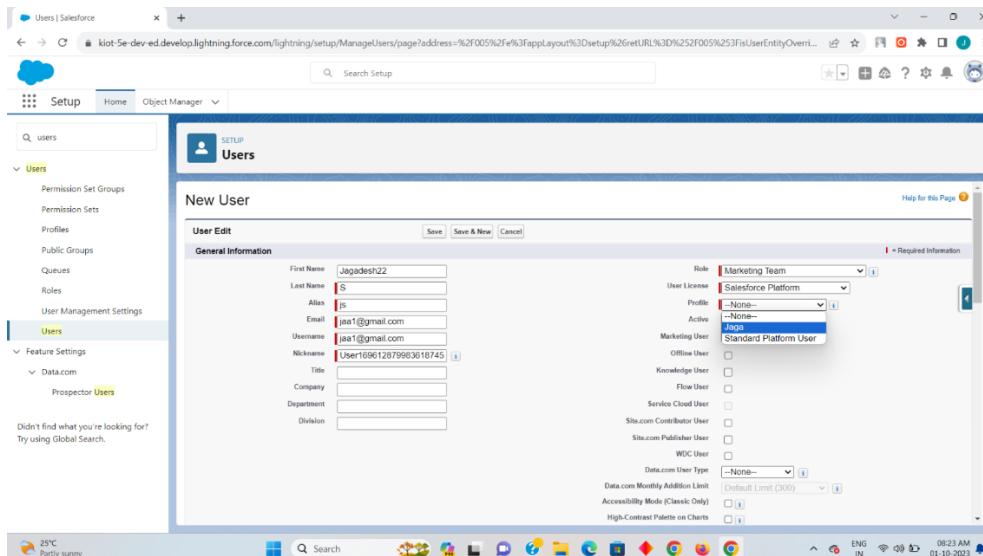
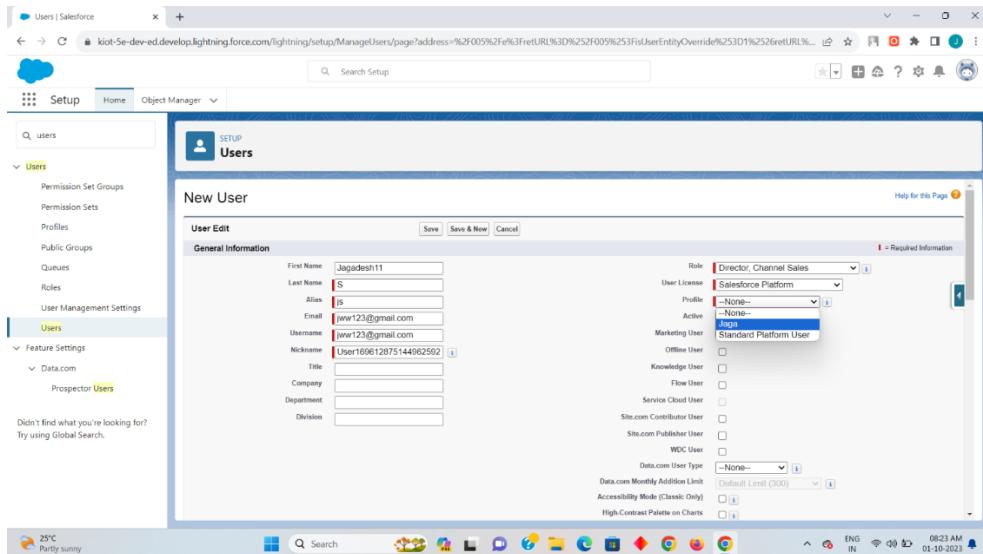
Edit with WPS Office

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.



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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 view and update service cases and 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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Q Search

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ENG IN 06:24 AM 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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Q Search

25°C Partly sunny

ENG IN 08:24 AM 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:**

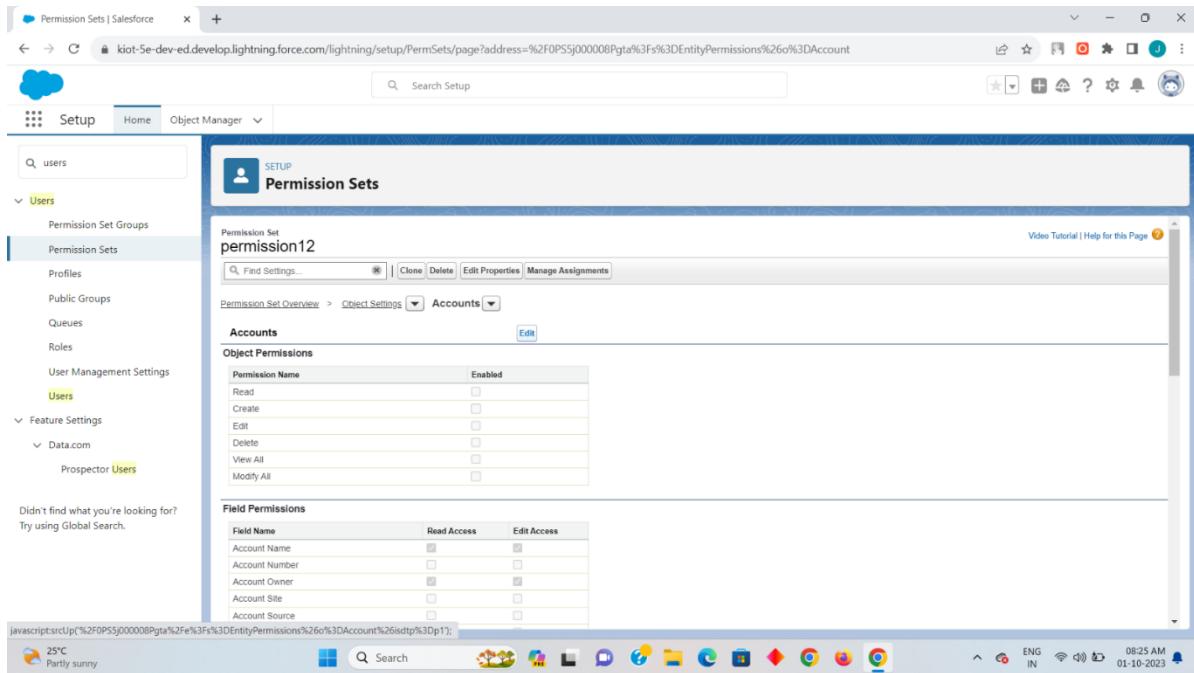
The screenshot shows the Salesforce Setup interface with the following details:

- 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	--



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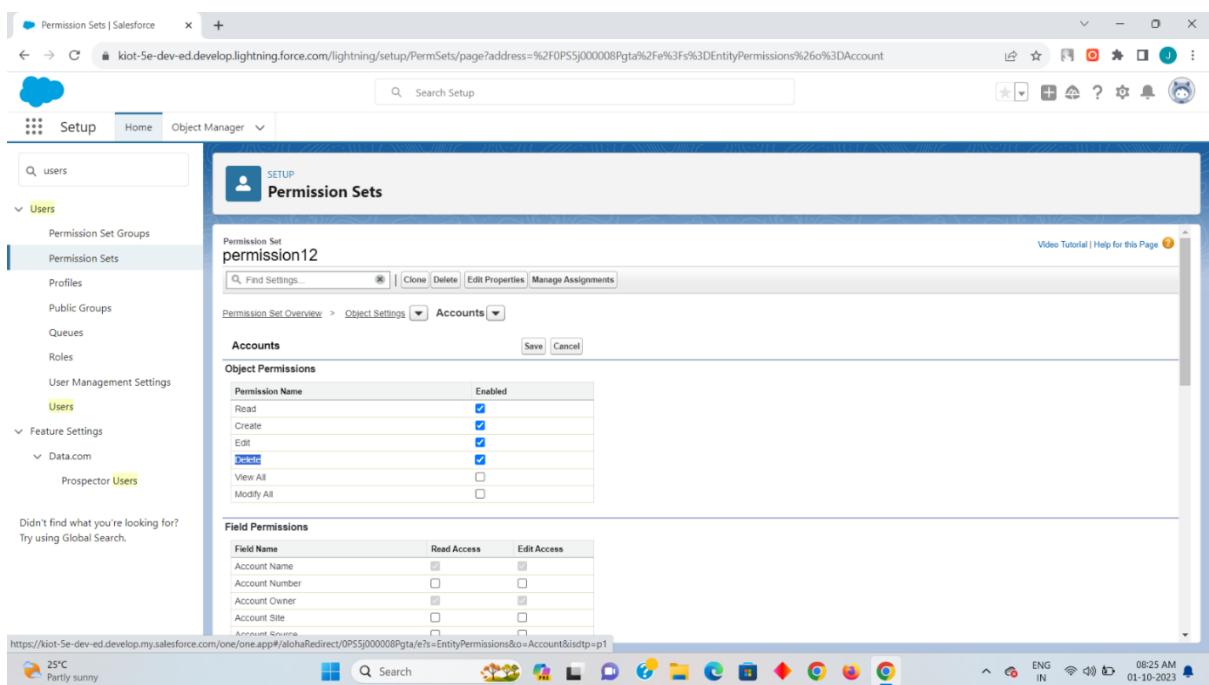
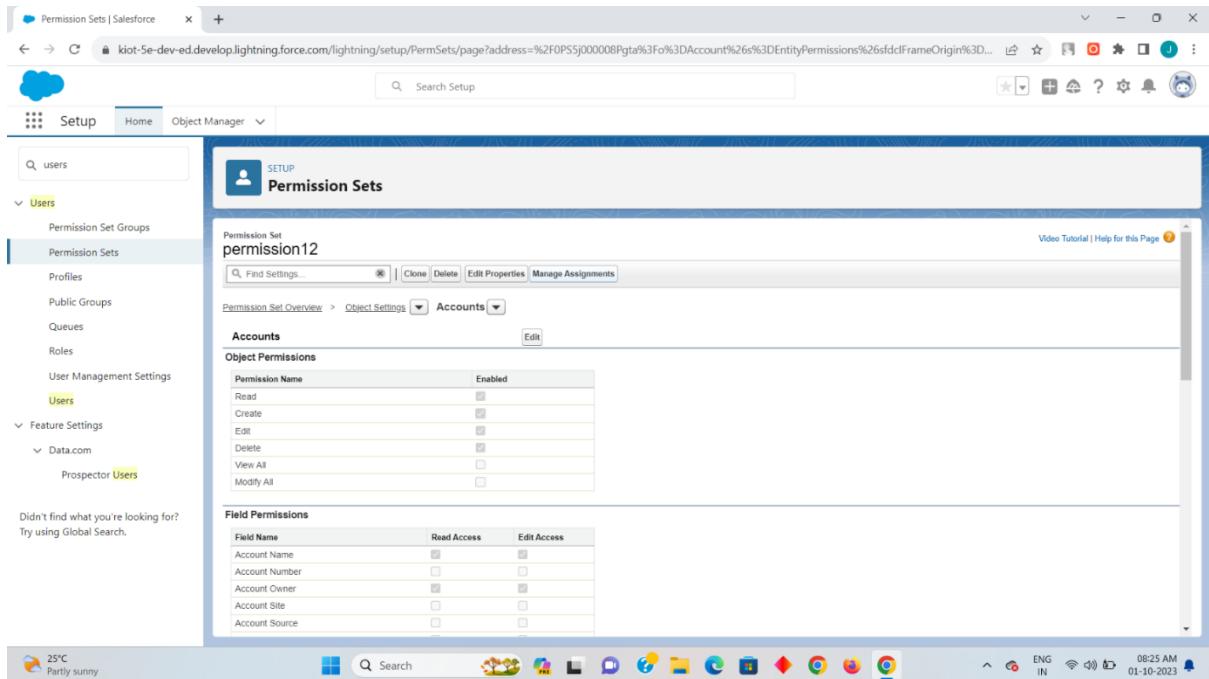


## Step 7:

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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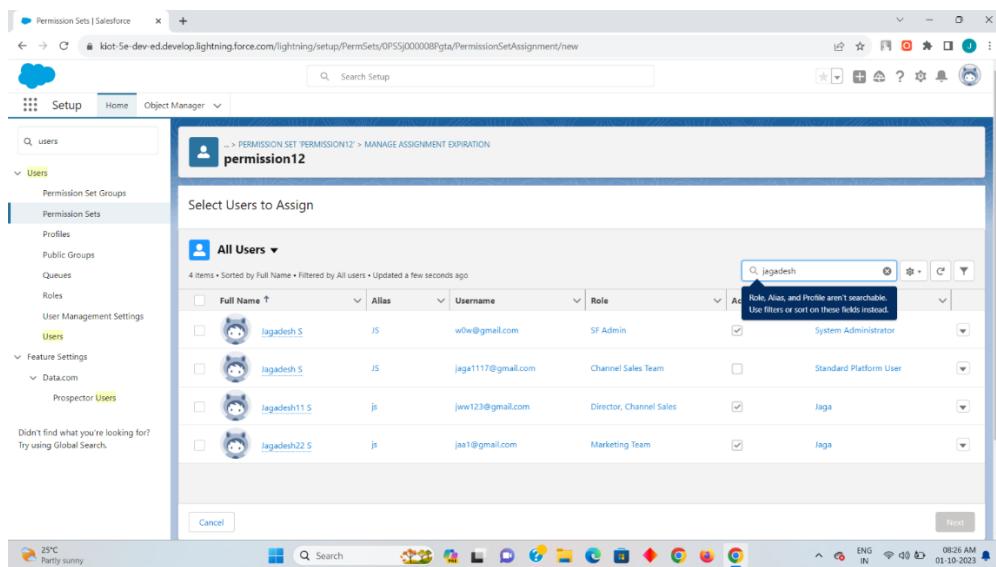
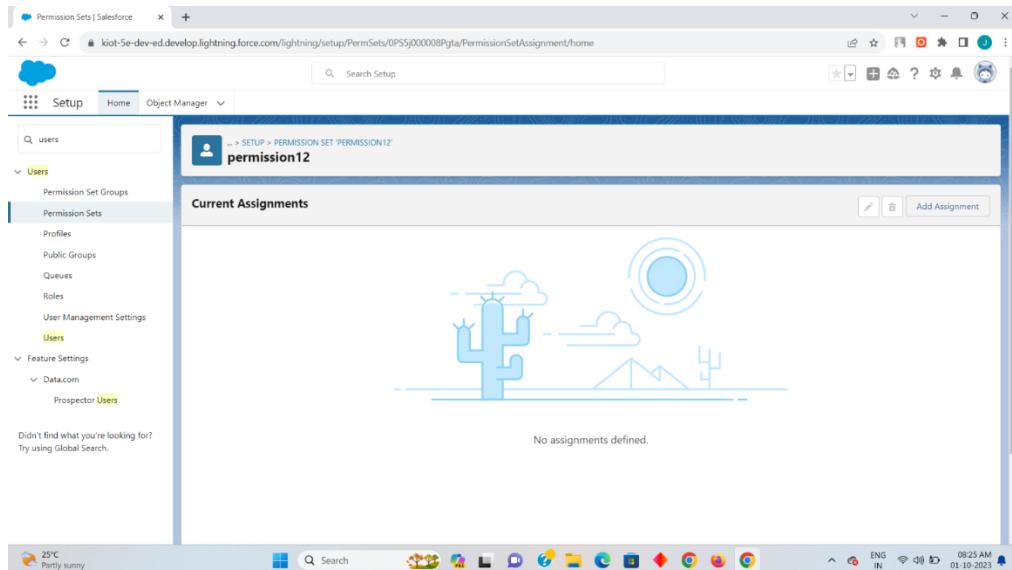
## Step 8

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:

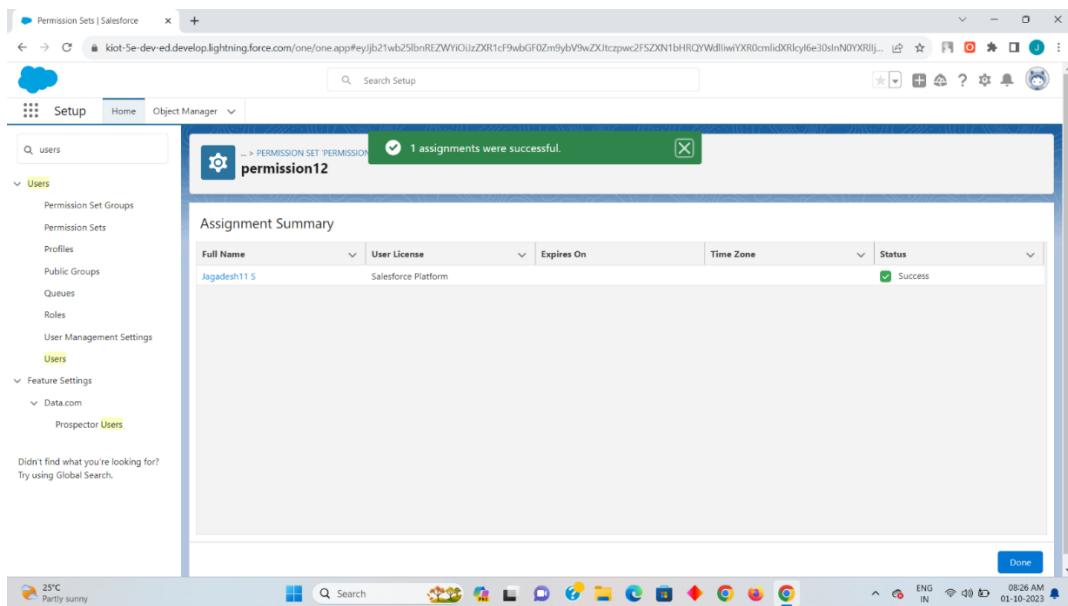
Full Name	Role	Profile	Active	User License	Expires On
Jagadesh11 S	Director, Channel Sales	Jaga	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires

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

Now click on Assign.



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



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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**.



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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



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# screenshot.

The screenshot shows the Salesforce Email Template page for 'Thank You Email - Survey'. The page has a header with 'Email Template' and the template name. It includes tabs for 'Details' and 'Related', and buttons for 'Edit in Builder', 'Edit', and 'Clone'. The 'Information' section contains fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Related Entity Type' (set to 'Survey Result'), 'Description' (empty), and 'Folder' (set to 'Public Email Templates'). A checkbox 'Made in Email Template Builder' is checked. The 'Message Content' section includes a subject 'Thank You For Completing Our Survey!' and an HTML value block. The HTML content starts with 'Hi {{Survey\_Result\_\_c.Name\_\_c}},' followed by a message of thanks for participation, a note about sharing results through State Survey Agency, and a closing note of gratitude. It ends with 'Thanks,  
Automation Champion'. The 'Additional Information' section shows 'Created By' Rakesh Gupta on 12/21/2020 at 4:23 PM and 'Last Modified By' Rakesh Gupta on 12/21/2020 at 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      Save    Save & New    Cancel

**Edit Email Alert**      | = Required Information

Description	Survey - Thank You Email
Unique Name	Survey_Thank_You_Email
Object	Survey Result
Email Template	Thank You Email - Survey
Protected Component	<input type="checkbox"/>

Recipient Type: Search: User for: Find

**Recipients**

Available Recipients	Selected Recipients
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email

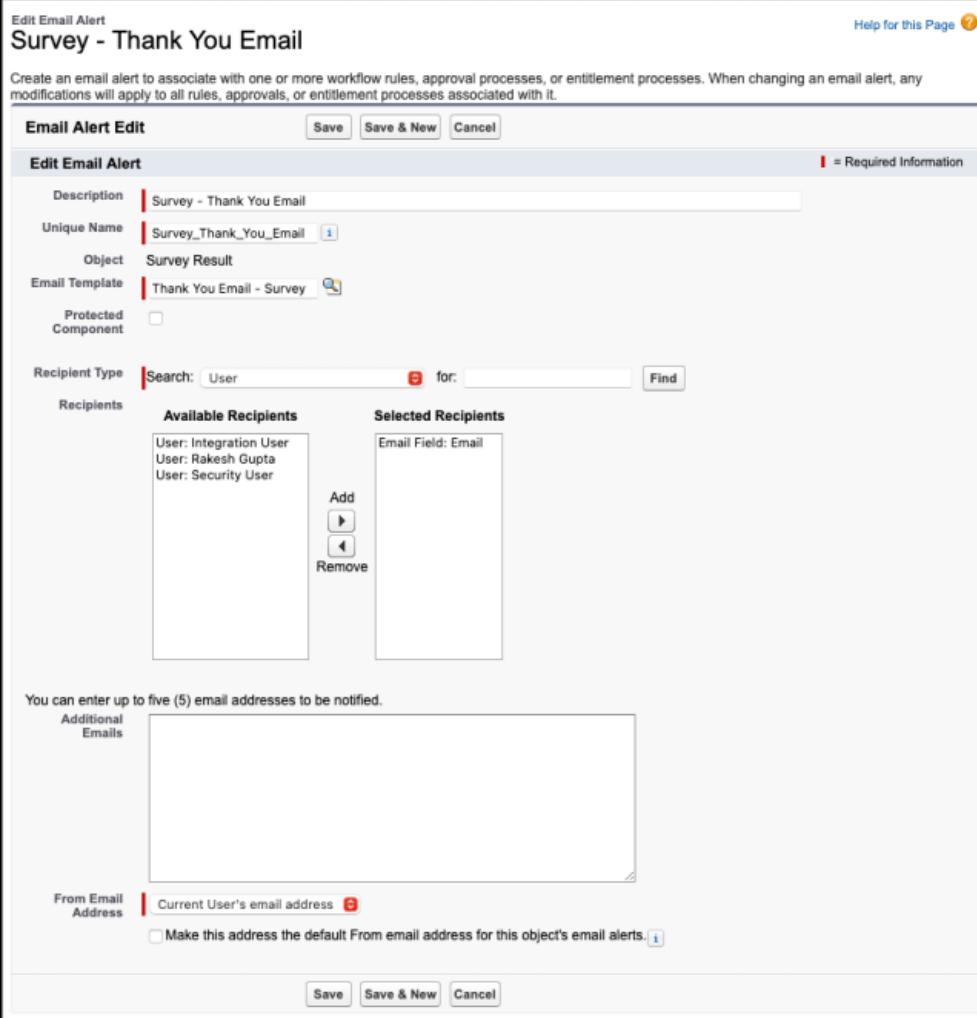
Add    Remove

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    Save & New    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**.



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



Edit Create Records

Create Salesforce records using values from the flow.

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

Description:

How Many Records to Create  
 One  
 Multiple

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

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

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text"/> 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
<a href="#">+ Add Field</a>	
<input type="checkbox"/> Manually assign variables	

Cancel Done

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

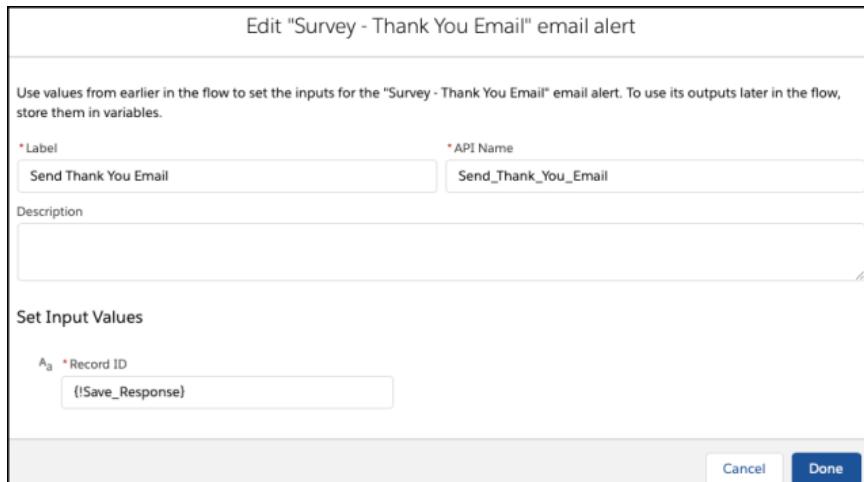
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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**.

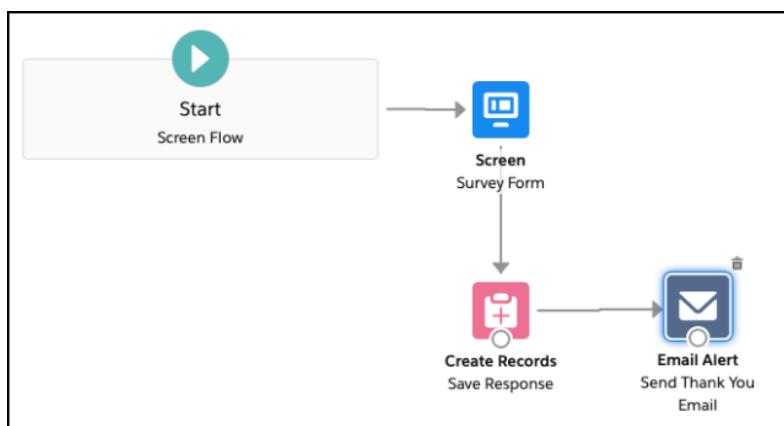


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- 4. Clicks on the Survey – Thank You Email email alert.**
- 5. Click Done.**



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

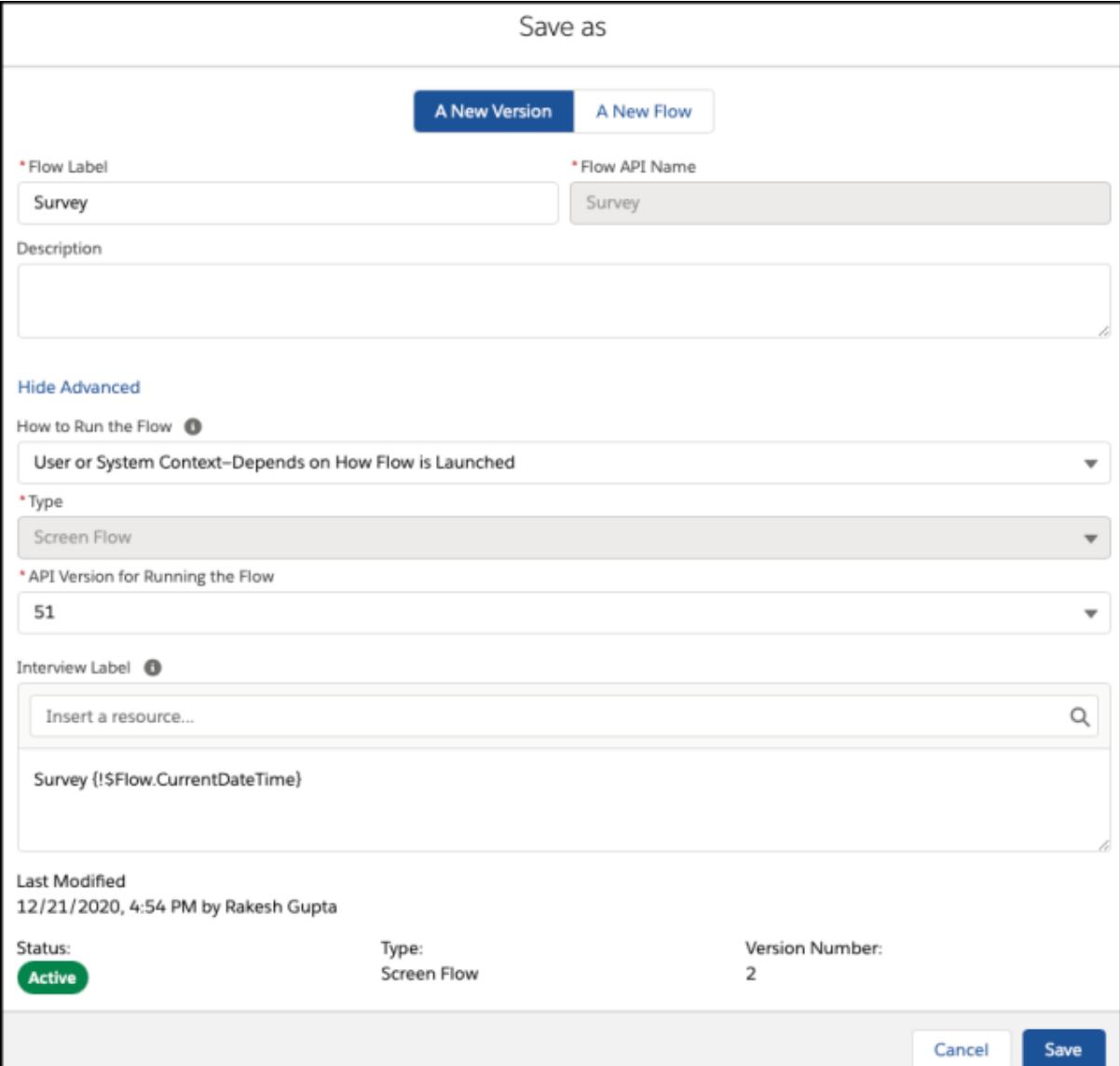
\* API Version for Running the Flow 51

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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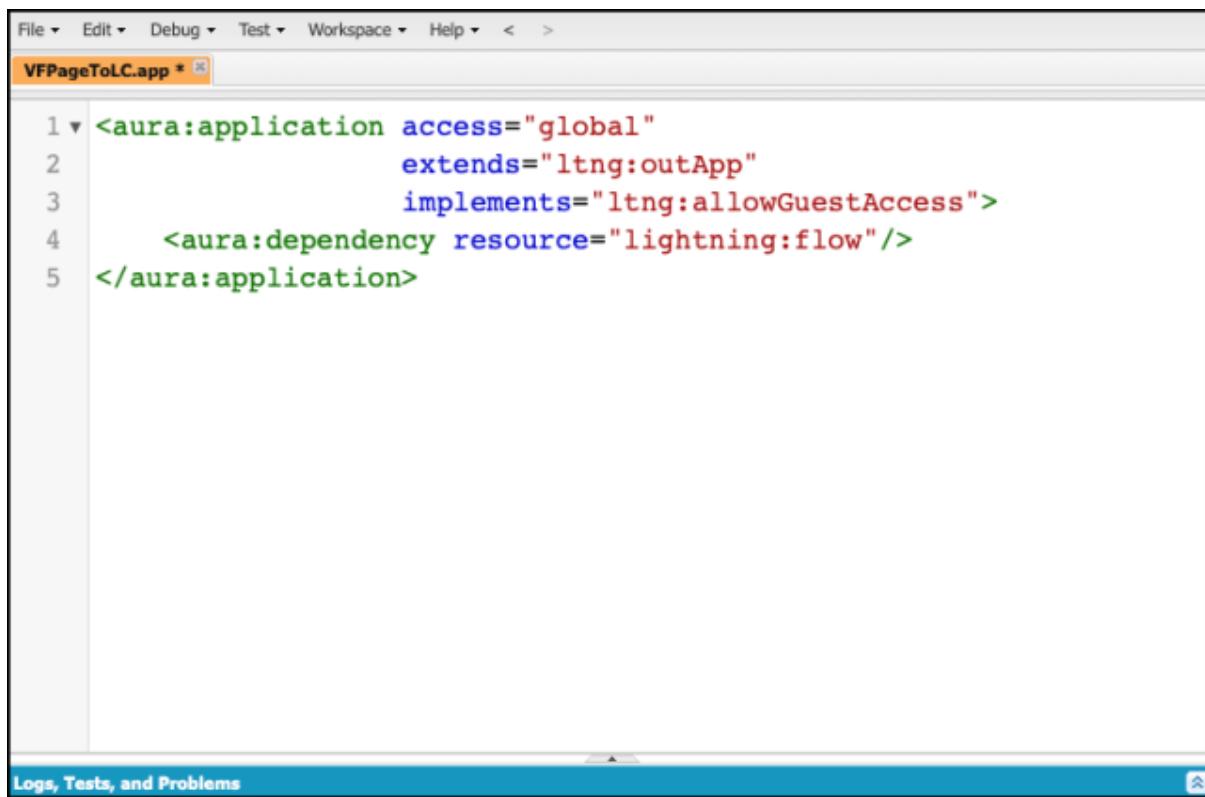
## Visualforce Page

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

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