

Naan Mudhalvan  
Salesforce  
Developer(Course)  
Assignment no 1

Name: Vaitheswari M

Naan Mudhalvan id:

au611420104088

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

Solution:

Step 1: Create Custom Objects

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

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** Shows "Setup" > "Object Manager".
- Section:** "New Custom Object" under "SETUP".
- Message Bar:** A yellow bar at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." It includes links to "Tell me more!" and "Don't show this message again".
- Custom Object Definition Edit:** A tab-based form with the following sections:
  - Custom Object Information:** Fields include "Label" (college), "Plural Label" (colleges), and "Example: Account". A note says "The singular and plural labels are used in tabs, page layouts, and reports." There is also a checkbox for "Starts with vowel sound".
  - Description:** A large text area for describing the object.
  - Context-Sensitive Help Setting:** Radio buttons for "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page".
  - Content Name:** A dropdown menu set to "None".
  - Enter Record Name Label and Format:** Fields for "Record Name" (college Name) and "Example: Account Name". A note says "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." A dropdown for "Data Type" is set to "Text".
  - Optional Features:** A list of checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing".
  - Object Classification:** A note stating "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." Checkboxes for "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access" are checked.
  - Deployment Status:** A note about deployment status. Radio buttons for "In Development" and "Deployed" are shown, with "Deployed" selected.
  - Search Status:** A note about search status. A checkbox for "Allow Search" is present.
  - Object Creation Options (Available only when custom object is first created):** Two checkboxes: "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".
- Buttons:** Standard "Save", "Save & New", and "Cancel" buttons at the bottom of the form.

# Second custom objects, let's call them "Department\_C"

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** Shows "Setup" > "Object Manager".
- Title Bar:** "Object Manager" with a "Help for this Page" link.
- Content Area:**
  - New Custom Object:** A message states "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." with links to "Tell me more!" and "Don't show this message again".
  - Custom Object Definition Edit:** Buttons for "Save", "Save & New", and "Cancel".
  - Custom Object Information:**
    - The singular and plural labels are used in tabs, page layouts, and reports.
    - Label:** "department" (example: Account)
    - Plural Label:** "departments" (example: Accounts)
    - Starts with vowel sound:** An unchecked checkbox.
  - Object Name:** "department" (example: Account)
  - Description:** A large text input field.
  - Context-Sensitive Help Setting:** Radio buttons for "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page".
  - Content Name:** A dropdown menu set to "None".
  - 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:** "Department Name" (example: Account Name)
    - Data Type:** "Text" (selected from a dropdown).
  - Optional Features:**
    - Checkboxes for: Allow Reports, Allow Activities, Track Field History, Allow In Chatter Groups, and Enable Licensing (unchecked).
  - Object Classification:**
    - Checkboxes for: Allow Sharing, Allow Bulk API Access, and Allow Streaming API Access (all checked).
  - Deployment Status:**
    - Radio buttons for "In Development" (unchecked) and "Deployed" (selected).
  - Search Status:**
    - A note: "When this setting is enabled, your users can find records of this object type when they search." with a "Learn more" link.
    - An unchecked checkbox for "Allow Search".
  - Object Creation Options (Available only when custom object is first created):**
    - Checkboxes for: Add Notes and Attachments related list to default page layout and Launch New Custom Tab Wizard after saving this custom object (both unchecked).
- Buttons at the bottom:** "Save", "Save & New", and "Cancel".

## Step 2: Create a Master-Detail Relationship

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

1. Goto Setup > Object Manager.
2. Click on "College\_\_c" to open its settings.

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

The screenshot shows the Salesforce Object Manager interface for the 'CDepartment' object. The left sidebar contains navigation links for Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main details pane shows the following configuration:

- Description:** CDepartment
- API Name:** CDepartment\_\_c
- Custom:** ✓
- Singular Label:** CDepartment
- Plural Label:** CDepartments
- Enable Reports:** (checkbox)
- Track Activities:** (checkbox)
- Track Field History:** (checkbox)
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

At the top right of the details pane are 'Edit' and 'Delete' buttons.

The screenshot shows the 'Fields & Relationships' section of the Salesforce Object Manager for the 'CDepartment' object. The left sidebar lists the same navigation links as the first screenshot. The main pane displays a step-by-step wizard for creating a new relationship:

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

Help for this Page [?](#)

Step 3 of 6

Previous Next Cancel

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

Lookup Filter: (empty)

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options under 'Fields & Relationships'. The main panel is titled 'New Relationship' and is on 'Step 2 of 6'. It asks to 'Select the other object to which this object is related' and has a dropdown set to 'college'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options under 'Fields & Relationships'. The main panel is titled 'New Custom Field' and is on 'Step 1 of 6'. It asks to 'Specify the type of information that the custom field will contain'. Under 'Data Type', the 'Roll Up Summary' option is selected. A detailed description of the 'Roll Up Summary' type is provided, mentioning it's 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. Navigation buttons 'Next' and 'Cancel' are at the bottom.

## Step 3: Create the Roll-Up Summary Field

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

1. Still on the "College\_c" settings, go to "Fields & Relationships."

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

Setup > OBJECT MANAGER  
CDepartment

**Fields & Relationships**  
4 Items, Sorted by Field Label

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

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

Setup > Object Manager > 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.

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

**Web Tabs**  
No Web Tabs have been defined

**Visualforce Tabs**  
No Visualforce Tabs have been defined

**Lightning Component Tabs**  
No Lightning component tabs have been defined

**Lightning Page Tabs**  
No Lightning Page Tabs have been defined

Salesforce Setup Object Manager college

**New Custom Field**

**Step 5. Add to page layouts**

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

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

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

Add Field Page Layout Name  
 college Layout

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

Help for this Page

Previous Save & New Save Cancel

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

Salesforce Setup Object Manager college

**New Custom Field**

**Step 4. Establish field-level security**

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

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

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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

Previous Next Cancel

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

The screenshot shows the third step of a five-step wizard for creating a new custom field. The title is "New Custom Field". The sub-step is "Step 3 of 5". The main section is titled "Step 3. Define the summary calculation". It includes a "Select Object to Summarize" section where "Master Object" is set to "college" and "Summarized Object" is set to "CDepartments". Below this is a "Select Roll-Up Type" section with radio buttons for COUNT (selected), SUM, MIN, and MAX. A "Field to Aggregate" dropdown is set to "None". Under "Filter Criteria", there are two options: "All records should be included in the calculation" (selected) and "Only records meeting certain criteria should be included in the calculation". Navigation buttons at the bottom right include "Previous", "Next", and "Cancel".

The screenshot shows the second step of a five-step wizard for creating a new custom field. The title is "New Custom Field". The sub-step is "Step 2 of 5". The main section is titled "Step 2. Enter the details". It includes fields for "Field Label" (set to "Total count"), "Field Name" (set to "Total\_count"), "Description" (empty), and "Help Text" (empty). There is also a checkbox for "Auto add to custom report type" which is checked, and a sub-checkbox "Add this field to existing custom report types that contain this entity" which is also checked. Navigation buttons at the bottom right include "Previous", "Next", and "Cancel".

The top screenshot shows the 'New Custom Field' wizard for the 'college' object. It's on Step 1, 'Choose the field type'. The 'Roll-Up Summary' type is selected. The bottom screenshot shows the 'Fields & Relationships' list for the 'college' object, displaying four fields: 'Name' (Text(80)), 'Created By' (Lookup(User)), 'Last Modified By' (Lookup(User)), and 'Owner' (Lookup(User,Group)).

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, Developer Name, Description).**

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The left sidebar has sections for 'User Interface' (selected), 'Rename Tabs and Labels', and 'Tabs'. A message at the top says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'New Custom Object Tab' and 'Step 2. Add to Profiles'. It displays a table where user profiles are mapped to tab visibility. The first row is selected with the radio button 'Apply one tab visibility to all profiles [Default On]'. The table has two columns: 'Profile' and 'Tab Visibility'. Most profiles have 'Default On' selected, except for 'Customer Community User' which has 'Default Off'. The bottom right of the table area contains 'Previous', 'Next', and 'Cancel' buttons.

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

Setup Home Object Manager

User Interface Rename Tabs and Labels Tabs

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

## SETUP Tabs

### New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

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

Object: college

Tab Style: Jewel

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

Splash Page Custom Link: —None--

Description:

Next Cancel

Setup Home Object Manager

User Interface Rename Tabs and Labels Tabs

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

## SETUP Tabs

### Step 3. Add to Custom Apps Step 3 of 3

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

Custom App	<input checked="" type="checkbox"/> Include Tab
Platform (standard_Platform)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>
Content (standard_Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>
Sales (standard_LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard_QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard_DataManager)	<input checked="" type="checkbox"/>
Bolt Solutions (standard_LightningBolt)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

Previous Save Cancel

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

## SETUP Tabs

### New Custom Object Tab

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

Description:

Next Cancel

Setup Home Object Manager

app

Salesforce Mobile App Data Mass Transfer Approval Requests

Apps

- App Manager
- AppExchange Marketplace
- Connected Apps
- Connected Apps OAuth Usage
- Manage Connected Apps
- Lightning Bolt
- Flow Category
- Lightning Bolt Solutions
- Mobile Apps
- Salesforce
- Salesforce Branding
- Salesforce Navigation
- Salesforce Notifications
- Salesforce Offline
- Salesforce Settings
- Packaging
- Installed Packages

## SETUP Lightning Experience App Manager

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

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

New Lightning App New Connected App

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. The main content area displays sections for 'Custom Tabs', 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section includes a 'New' button and a 'What Is This?' link. The 'Custom Object Tabs' section lists several tabs with their labels and styles:

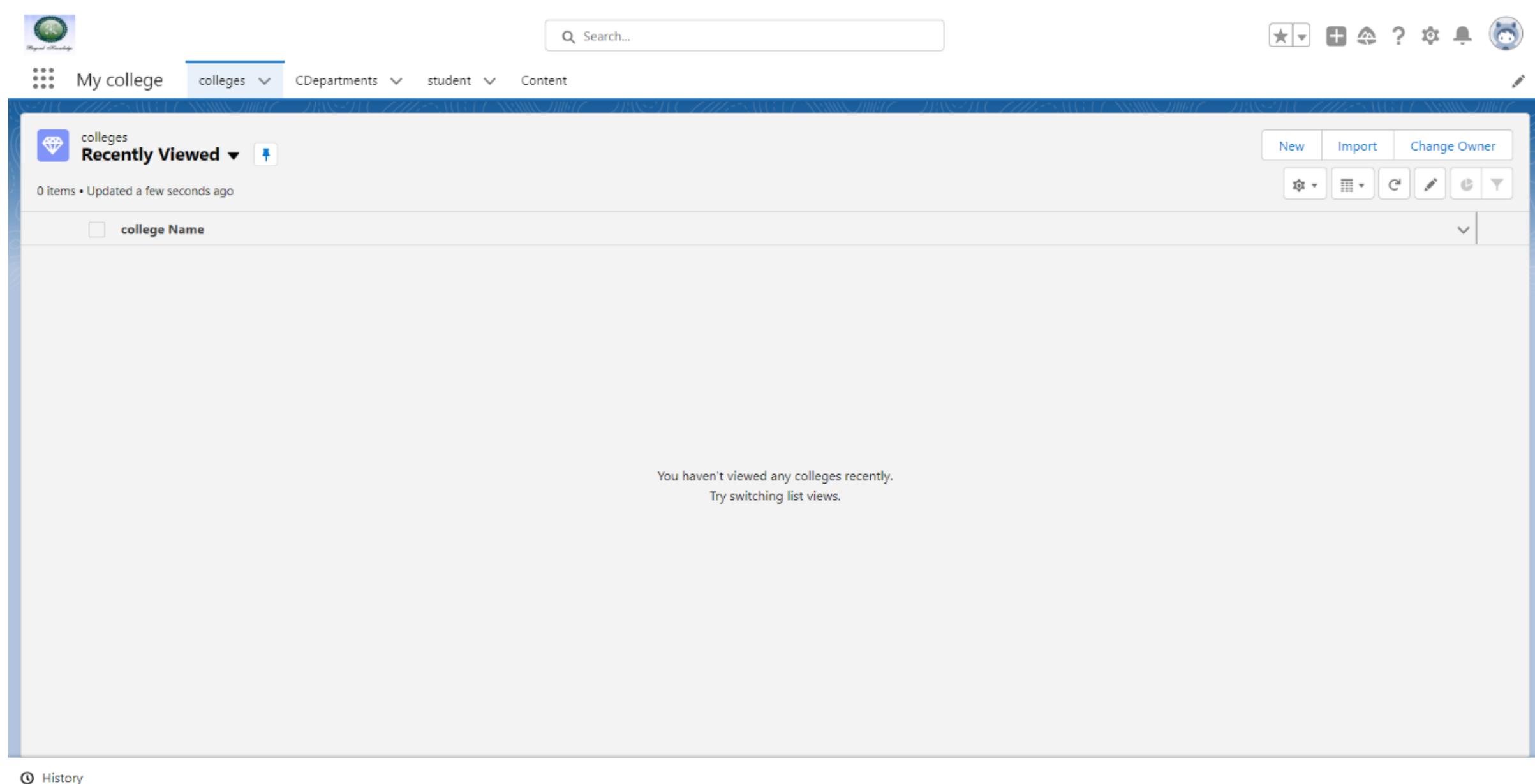
Action	Label	Tab Style	Description
Edit   Del	Book1	Box	
Edit   Del	CDepartments	Lightning	
Edit   Del	colleges	Jewel	
Edit   Del	Research Proposal	Square	
Edit   Del	student	Box	

The screenshot shows the 'New Lightning App' configuration page. The left sidebar shows 'Salesforce N...' and 'Data' sections. The main form is titled 'App Details & Branding' and includes fields for 'App Name' (My college), 'Developer Name' (My\_college), 'Description' (Enter a description...), 'Image' (a logo for 'Beyond Knowledge'), 'Primary Color Hex Value' (#217AC7), and 'Org Theme Options' (checkbox checked). A progress bar at the bottom indicates step 1 of 5.

## 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.**



app-d-dev-ed.develop.lightning.force.com/lightning/o/college\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigat... Finish update

My college colleges CDdepartments student Content

New college

Information

\* = Required Information

Owner krishna s

college Name kiot

phone 9087116402

Email kiot@.ac.in

Location

Latitude 90

Longitude 80

Cancel Save & New Save

Recently Viewed

0 items • Updated a minute ago

college Name

History

New Import Change Owner

My college colleges CDdepartments student Content

CDdepartments Recently Viewed

1 item • Updated a few seconds ago

Department Name cse

New Import

History

1 cse

app-d-dev-ed.develop.lightning.force.com/lightning/o/CDepartment\_c/new?count=3&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=169...

Search... Finish update

My college colleges CDepartment

To unpin, pin another list view

New CDepartment

\* = Required Information

Information
*Department Name information technology
*college kiot
email it@gmail.com
phone 897577568
hod name arul
about

Cancel Save & New Save

CDepartments Recently Viewed

1 item • Updated a minute ago

Department Name cse

History

The screenshot shows a Salesforce Lightning interface for creating a new CDepartment record. The main title is "New CDepartment". The "Information" section contains several input fields: "Department Name" (value: "information technology"), "college" (value: "kiot"), "email" (value: "it@gmail.com"), "phone" (value: "897577568"), "hod name" (value: "arul"), and "about" (empty). A tooltip "To unpin, pin another list view" is visible above the list view area. The bottom right of the form has buttons for "Cancel", "Save & New", and "Save". On the left, there's a sidebar titled "Recently Viewed" showing a single item: "1 item • Updated a minute ago" with "Department Name" set to "cse". The top navigation bar includes "My college", "colleges", and "CDepartment". The status bar at the bottom shows "History".

My college colleges CDepartments student Content

CDepartment information technology

New Contact Edit New Opportunity

Related		Details
Department Name	information technology	
college	kiot	
email	it@gmail.com	
phone	897577568	
hod name	arul	
about		
Created By	krishna s. 01/10/2023, 11:19 am	
Last Modified By	krishna s. 01/10/2023, 11:19 am	

History

My college colleges CDepartments student Content

college kiot

New Contact Edit New Opportunity

Related		Details
college Name	kiot	
Total count	1	
phone	9087116402	
Email	kiot@gmail.com	
Location	90, 80	
Created By	krishna s. 01/10/2023, 11:16 am	
Last Modified By	krishna s. 01/10/2023, 11:17 am	

History

My college colleges CDepartments student Content

CDepartments Recently Viewed

1 item • Updated a few seconds ago

<input type="checkbox"/> Department Name
1 <input type="checkbox"/> cse

New Import

Recently Viewed

1 item • Updated a few seconds ago

	college Name
1	kiot

New Import Change Owner

grid view list view

History

college kiot

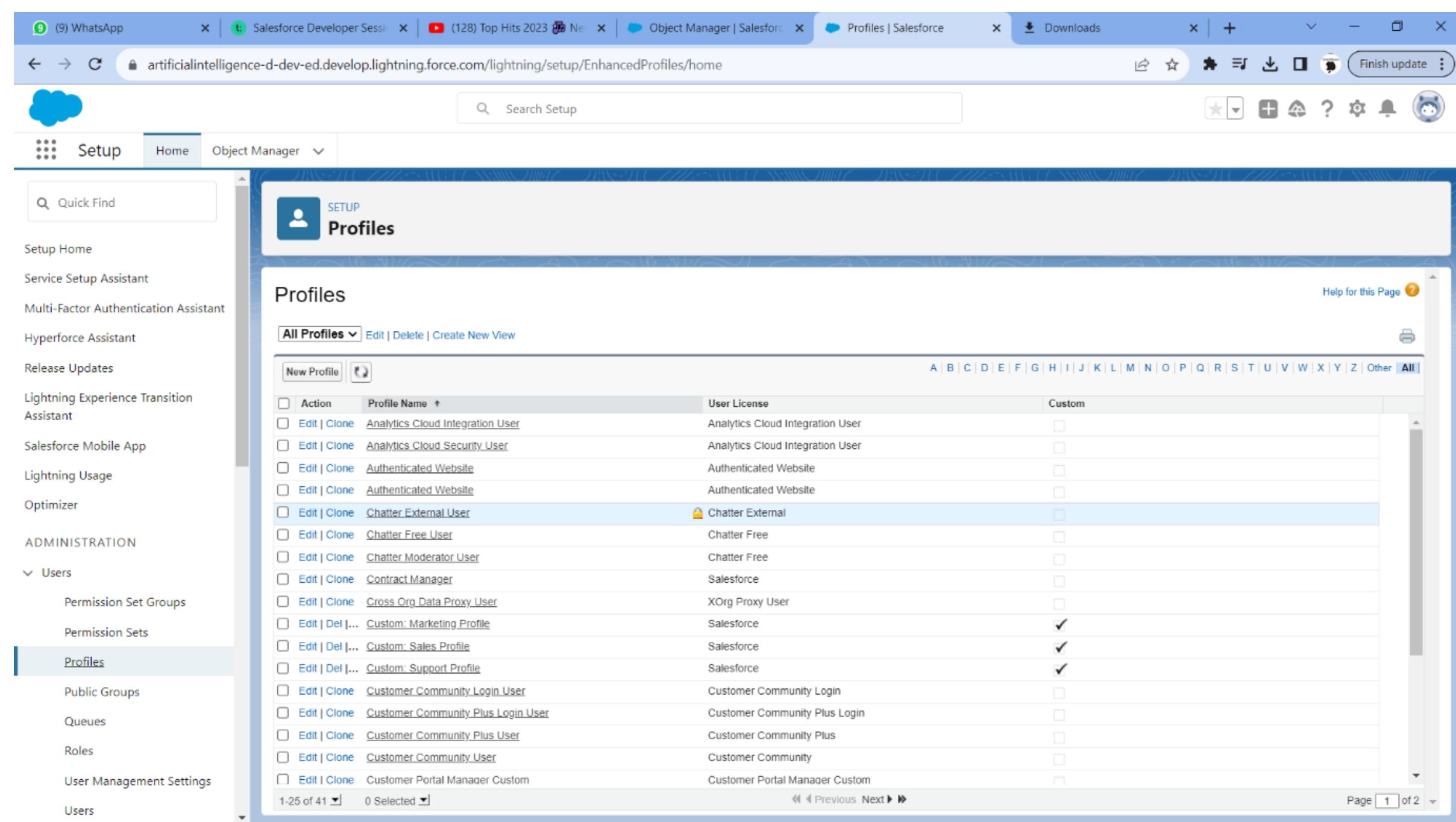
New Contact Edit New Opportunity

Related		Details	
college Name	kiot	Owner	krishna s.
Total count	2		
phone	9087116402		
Email	kiot@gmail.com		
Location	90, 80		
Created By	krishna s., 01/10/2023, 11:16 am	Last Modified By	krishna s., 01/10/2023, 11:19 am

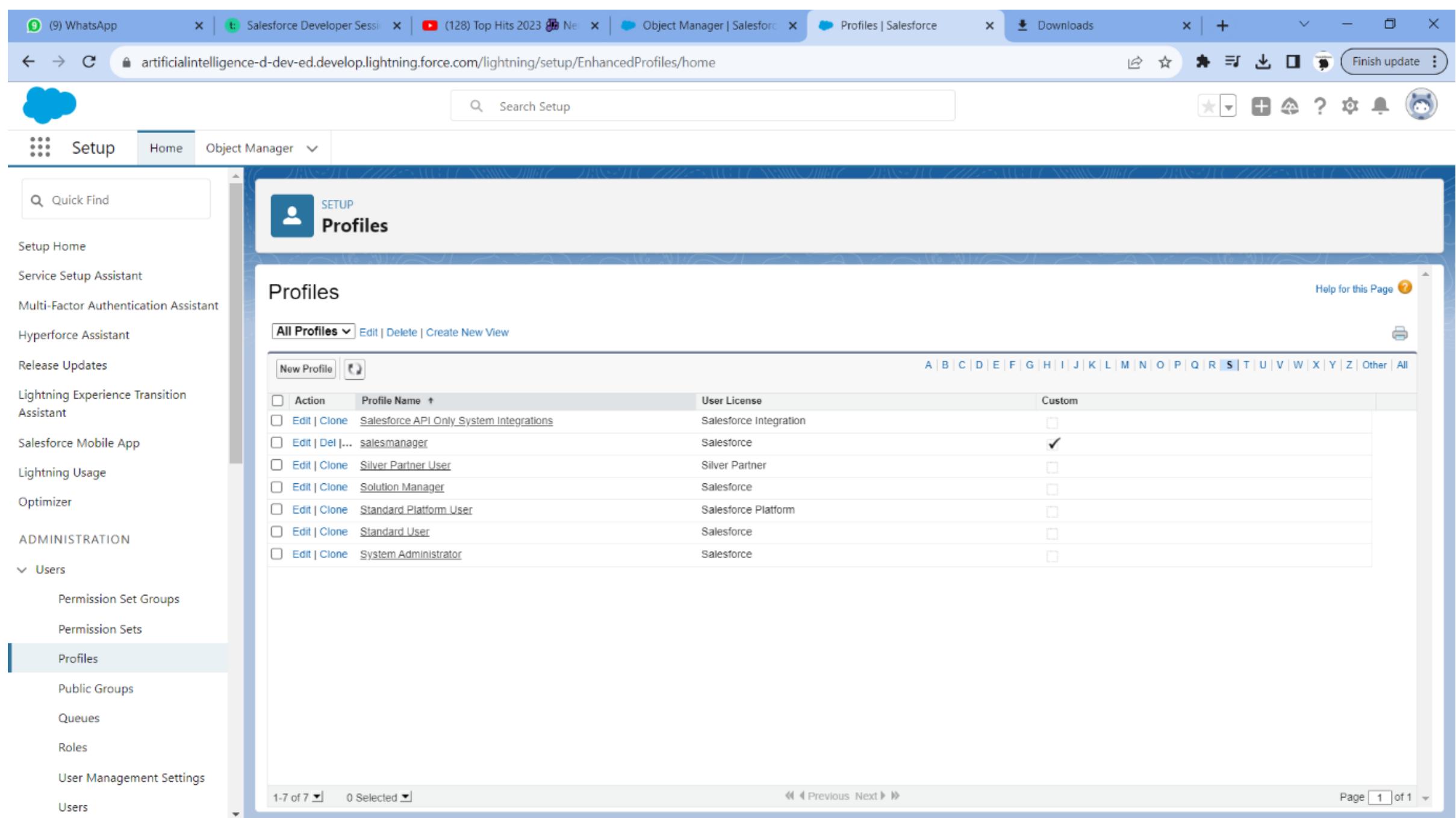
2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

Solution:

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



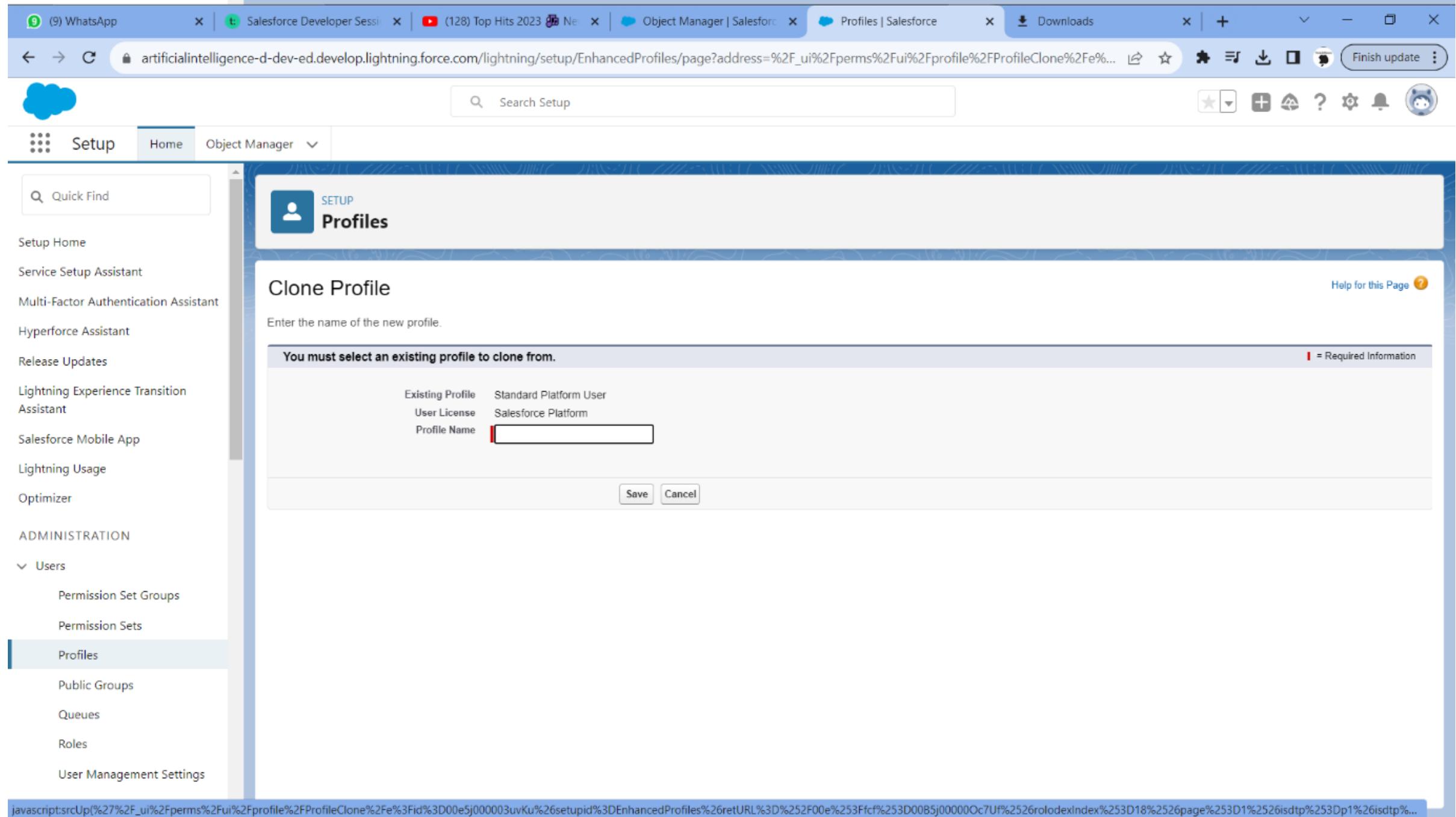
The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main area displays a list of profiles. The 'Chatter External' profile is selected, indicated by a blue highlight. The columns in the list are 'Action', 'Profile Name', 'User License', and 'Custom'. The 'User License' column includes links for Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter Free, Chatter Free User, Chatter Moderator User, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, Custom Sales Profile, Custom Support Profile, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, and Customer Portal Manager Custom. The 'Custom' column contains several checked checkboxes, notably for 'Salesforce' under Chatter Free, Chatter Free User, and Chatter Moderator User, and for 'Customer Community' under Customer Community Login User and Customer Community Plus Login User.



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. Under Users, the Profiles link is selected. The main content area displays a table of profiles:

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

Help for this Page [?](#)



The screenshot shows the 'Clone Profile' dialog box. It instructs the user to 'Enter the name of the new profile.' A note at the top states 'You must select an existing profile to clone from.' Below this, it shows an 'Existing Profile' table with one entry: Standard Platform User, User License Salesforce Platform, and Profile Name (input field). A note indicates 'I = Required Information'. At the bottom are 'Save' and 'Cancel' buttons.

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

- Header:** The URL is <https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fedit>. The tabs at the top include WhatsApp, Salesforce Developer Session, Top Hits 2023, Object Manager | Salesforce, Profiles | Salesforce, Downloads, and Finish update.
- Left Sidebar:** The sidebar under "Setup" includes links for Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and a expanded "ADMINISTRATION" section with sub-links: Users (Permission Set Groups, Permission Sets, **Profiles**, Public Groups, Queues, Roles), User Management Settings, and Users.
- Page Content:** The main content area is titled "SETUP Profiles" and "Clone Profile". It displays the message "You must select an existing profile to clone from." Below this, there are fields for "Existing Profile" (Standard Platform User), "User License" (Salesforce Platform), and "Profile Name" (input field containing "Manager"). At the bottom are "Save" and "Cancel" buttons.

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%3Fsetupid%3DEnhancedProfiles

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

SETUP Profiles

Profile Manager

Help for this Page ?

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

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

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

**Profile Detail**

Name		Manager	Custom Profile
User License	Salesforce Platform	<input checked="" type="checkbox"/>	
Description			
Created By	GOPAL S, 01/10/2023, 7:09 pm	Modified By	GOPAL S, 01/10/2023, 7:09 pm

**Page Layouts**

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

**Setup** Home Object Manager

## Profiles

**Manager**

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	Manager	Save	Save & New	Cancel
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>		
Description				

**Custom App Settings**

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

**Service Provider Access**

Overwrite users' personal tab customizations

**Tab Settings**

Home	Default On	Learning	Default On
Accounts	Default On	Libraries	Tab Hidden
Alert Settings	Default On	Lightning Bolt Solutions	Default On

**Communication Subscription Channel Types**

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

**Custom Object Permissions**

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

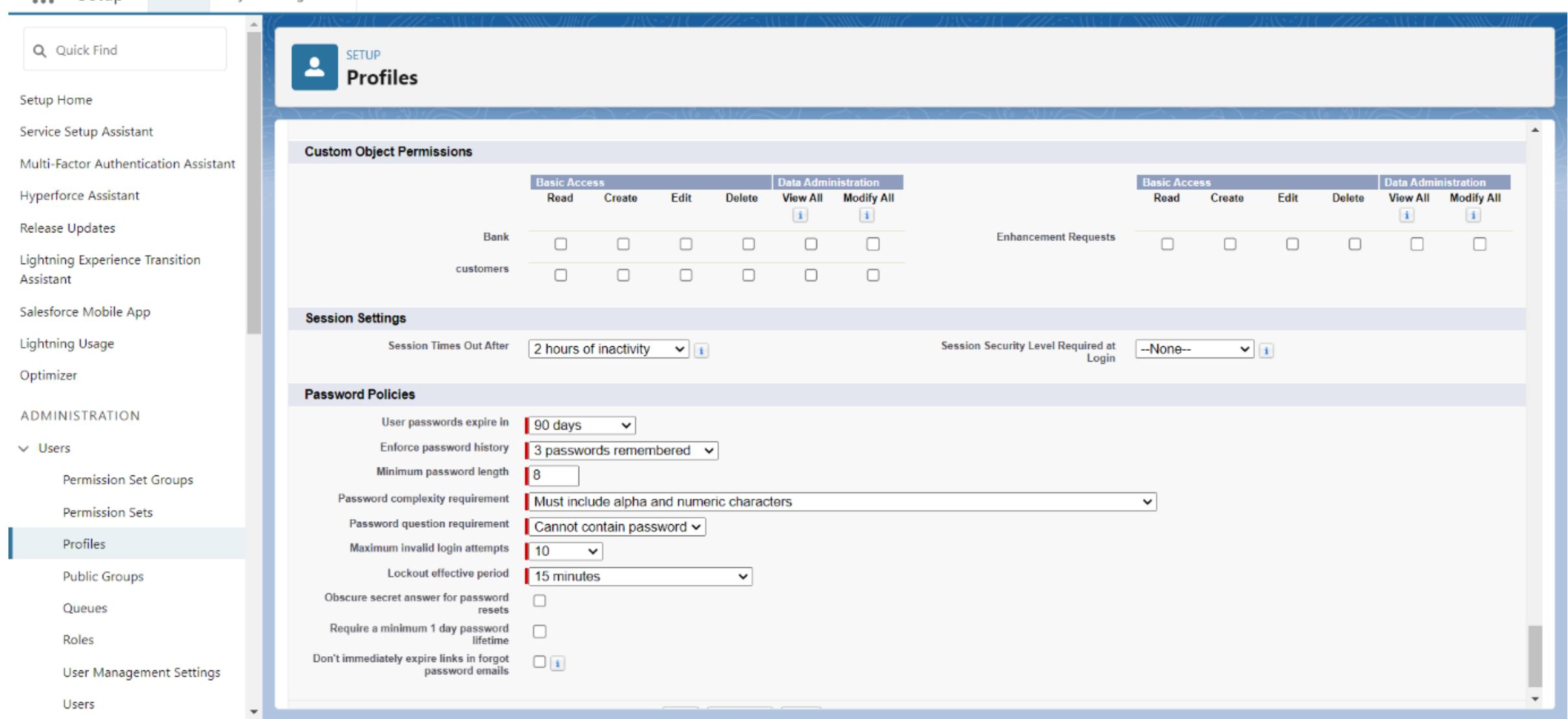
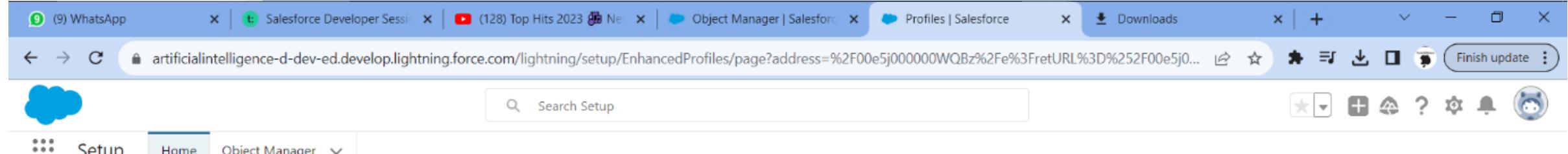
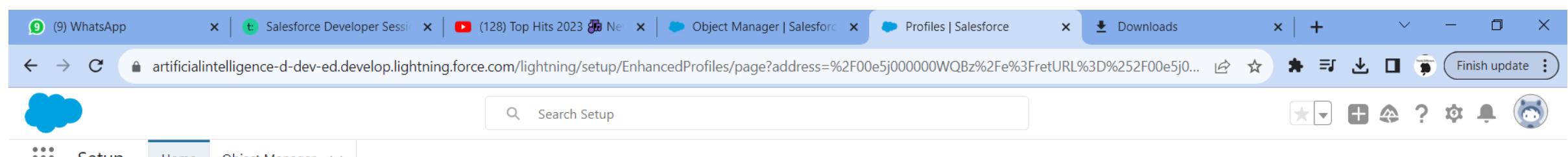
**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

**Password Policies**

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8



**Setup** Home Object Manager

## Profiles

Custom Object Permissions

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

Enhancement Requests

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

**Users**

## All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

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

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>   <a href="#">Login</a>	Adanna_Diya	dadan	test_diya_pas_4w8bjybi5wiktszorgsbkxpx_3qj8ofoyzwns_h43bkzw6mea@gmail.com		<input checked="" type="checkbox"/>	UMS User
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty_00d5j00000bcskkeab_1c0fwmqgike@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>   <a href="#">Login</a>	Ellington_Amelia	aeilli	amelia_ellington_1_46kxcp9oodih_d6cwpdcuo4wh_hnbdwmvwhhg_wguctpr1dalv@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	S_GOPAL	GS	kios20@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	User_Integration	integ	integration@00d5j00000bcskkeab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@00d5j00000bcskkeab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv...

Cloud icon

Setup Home Object Manager

## Users

### New User

User Edit

General Information

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

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Required Information: !

Save Save & New Cancel

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION > Users > Data > Email PLATFORM TOOLS > Apps > Feature Settings

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2fe%3FretURL%3D%252F005%253FisUserEntityOv...

Cloud icon

Setup Home Object Manager

## Users

### New User

User Edit

General Information

First Name	sowmiya
Last Name	bala
Alias	sbala
Email	2k20cse179@kiot.ac.in
Username	2k21it@kiot.ac.in
Nickname	User169616771282564526
Title	worker
Company	kiot bank
Department	
Division	

Role: <None Specified>

User License: Salesforce Platform

Profile: Manager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Required Information: !

Save Save & New Cancel

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION > Users > Data > Email PLATFORM TOOLS > Apps > Feature Settings

The image shows a dual-monitor setup. The left monitor displays the Salesforce User Management interface, specifically the 'Users' page for a user named 'sowmiya bala'. The right monitor displays the Gmail inbox.

**Salesforce User Management (Left Monitor):**

- Page Header:** artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000A4UxG%3Fnoredirect%3D1%26isUserEntityO... (with a 'Finish update' button)
- Setup Bar:** Home, Object Manager
- Left Sidebar:** 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 (selected), Data, Email, Platform Tools, Apps, Feature Settings.
- User Detail:** Name: sowmiya bala, Alias: sibala, Email: 2k20cse179@kiot.ac.in [Verify], Username: 2k21it@kiot.ac.in, Nickname: User16961677128296452616, Title: worker, Company: kiot bank, Department, Division, Address, 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, App Registration: Salesforce Authenticator.
- Role:** User License: Salesforce Platform Profile: Manager, Active: checked, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations: View, Data.com User Type: View, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling: checked, Salesforce CRM Content User: checked.

**Gmail Inbox (Right Monitor):**

- Page Header:** mail.google.com/mail/u/0/#inbox/ (with a 'Finish update' button)
- Left Sidebar:** Mail (99+), Compose, Chat, Spaces, Meet.
- Inbox:** 5,318 messages.
- Message Preview:** From support@salesforce.com (sent 7:13 PM (0 minutes ago)).

**Welcome to Salesforce!**  
Click below to verify your account.  
**Verify Account**  
To easily log in later, save this URL:  
<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>  
Username:  
2k21it@kiot.ac.in  
Again, welcome to Salesforce!

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

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

WATCH ON DEMAND

AIDay

© 2023 Salesforce, Inc. All rights reserved.

Recently Viewed | Bank | Salesforce

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

Incognito Finish update

kiot 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.

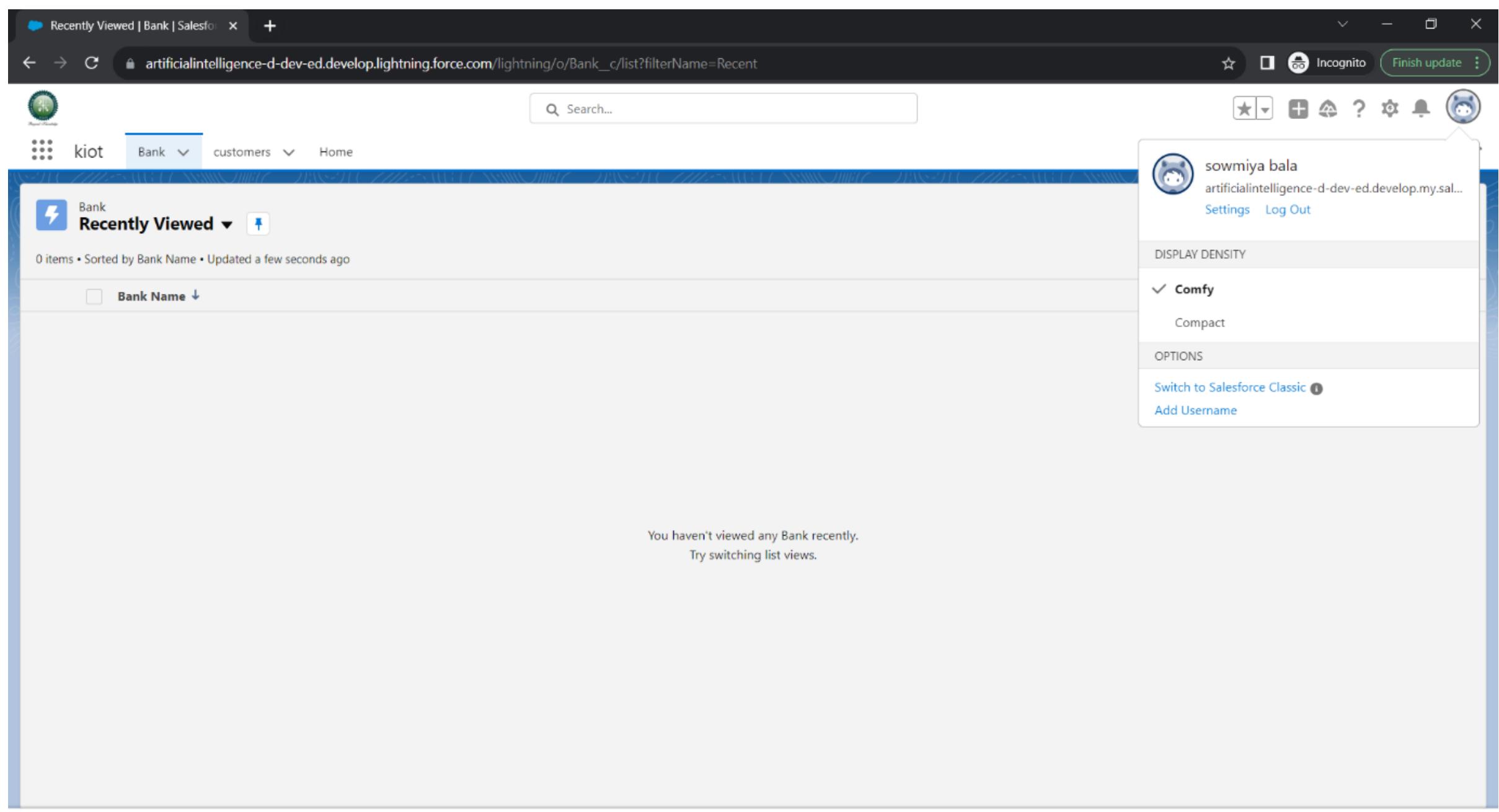
sowmiya bala  
artificialintelligence-d-dev-ed.develop.my.salesforce.com  
Settings Log Out

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... Incognito Finish update

kiot Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

Information

\* = Required Information

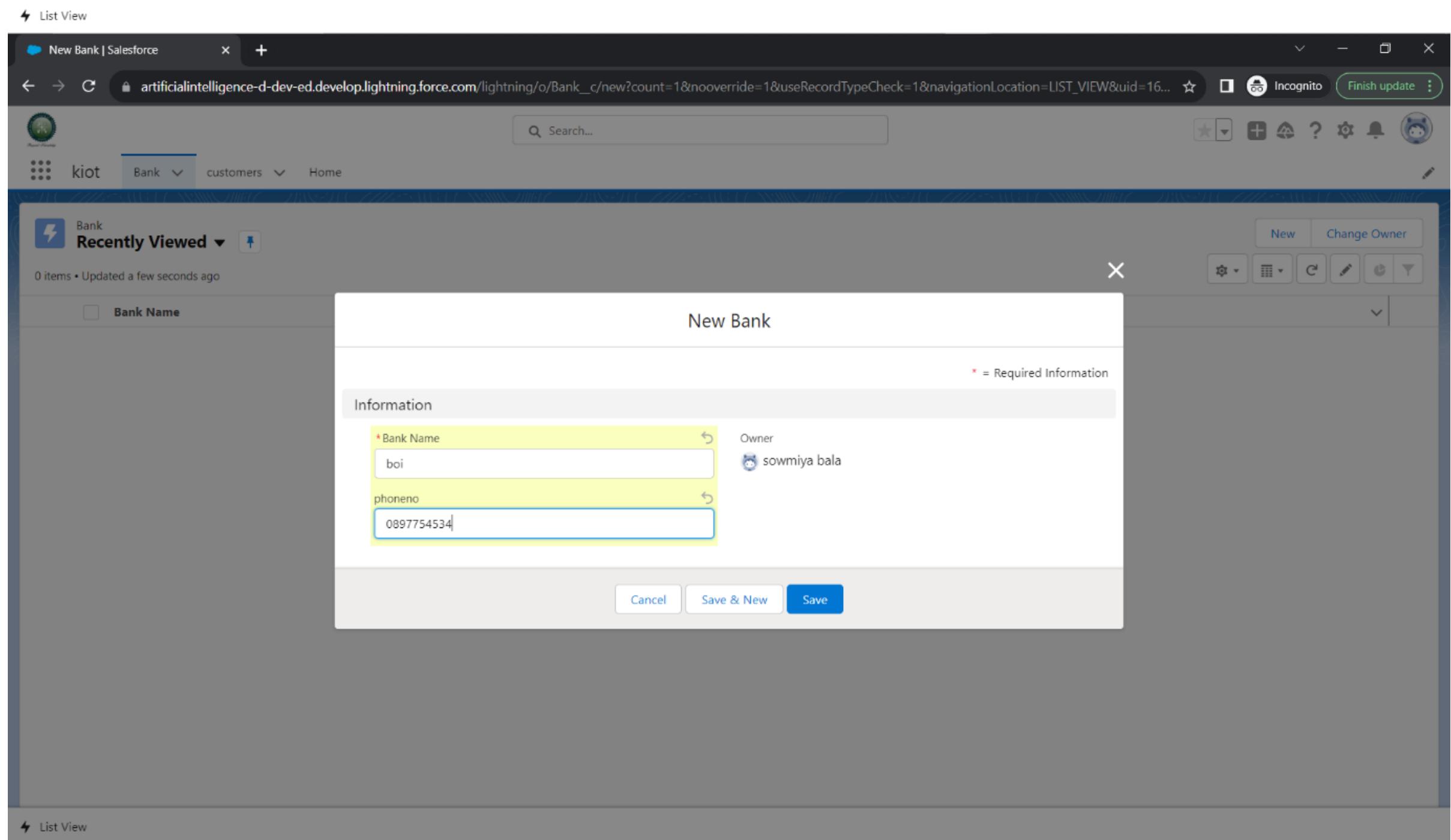
Bank Name: boi

Owner: sowmiya bala

phoneno: 0897754534

New Change Owner

Cancel Save & New Save



New customer | Salesforce

Recently Viewed

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

customer Name ↓

New customer

Information

\*customer Name: madhu

\*Bank: boi

Cancel Save & New Save

madhu | customer | Salesforce

customer "madhu" was created.

Related Details

customer Name: madhu

Bank: boi

Created By: sowmiya bala, 01/10/2023, 7:17 pm

Last Modified By: sowmiya bala, 01/10/2023, 7:17 pm

New Contact Edit Delete

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

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

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

SETUP Profiles

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

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

1 of 7 | 0 Selected | Previous | Next | Page 1 of 1

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

I = Required Information

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

Save Cancel

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

## Setup Profiles

**Profile**  
**salesmanage**

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

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

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

**Profile Detail**

Name	Salesmanage	<a href="#">Edit</a>	<a href="#">Clone</a>	<a href="#">Delete</a>	<a href="#">View Users</a>
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>			
Description					
Created By	GOPAL S. 01/10/2023, 7:19 pm	Modified By GOPAL S. 01/10/2023, 7:19 pm			

**Page Layouts**

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

**ADMINISTRATION**

Users

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

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

## Setup Profiles

**Profile Edit**  
**salesmanage**

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	<input type="text" value="salesmanage"/>	<a href="#">Save</a>	<a href="#">Save &amp; New</a>	<a href="#">Cancel</a>
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>		
Description				

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

Standard Tab Settings	Home	Default On	Learning	<input type="button" value="Default On"/>
Accounts	<input type="radio"/>	<input checked="" type="radio"/>	Billing	<input type="radio"/>
Opportunities	<input type="radio"/>	<input checked="" type="radio"/>	Lead	<input type="radio"/>
Tasks	<input type="radio"/>	<input checked="" type="radio"/>	Case	<input type="radio"/>
Events	<input type="radio"/>	<input checked="" type="radio"/>	Case History	<input type="radio"/>

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

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

Custom Object Permissions

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

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

Password Policies

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

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

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

Custom Object Permissions

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

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

Password Policies

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

Save | Save & New | Cancel

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Post | Users | Salesforce | Welcome to Salesforce: Verify your account | Finish update

Setup Home Object Manager

Search Setup

Cloud icon

User icon

SETUP Users

New User

User Edit

General Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Post | Users | Salesforce | Welcome to Salesforce: Verify your account | Finish update

Setup Home Object Manager

Search Setup

Cloud icon

User icon

SETUP Users

New User

User Edit

General Information

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:

Role: <None Specified>

User License: Salesforce Platform

Profile: salesmanage

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:

Help for this Page

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

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Mailing Address

Street: [ ]

City: [ ]

Zip/Postal Code: [ ]

State/Province: [ ]

Country: [ ]

Single Sign On Information

Federation ID: [ ]

Locale Settings

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

Locale: English (India)

Language: English

Approver Settings

Delegated Approver: [ ]

Manager: [ ]

Receive Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately

Save Save & New Cancel

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

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Mailing Address

Street: 4/194, ariyampalayam, uthamasolapuram..

City: SALEM

Zip/Postal Code: 636308

State/Province: TAMIL NADU

Country: [ ]

Single Sign On Information

Federation ID: [ ]

Locale Settings

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

Locale: English (India)

Language: English

Approver Settings

Delegated Approver: [ ]

Manager: [ ]

Receive Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately

Save Save & New Cancel

The image displays two screenshots of a web browser showing the configuration and verification of a new Salesforce user account.

**Screenshot 1: Salesforce Setup - User Detail**

This screenshot shows the Salesforce Setup interface under the "Users" section. A user named "madhu b" is being edited. The "Edit" tab is selected. The user's details include:

- Name:** madhu b
- Alias:** mb
- Email:** 2k20cse179@kiot.ac.in [Verify] [\[Edit\]](#)
- Username:** 2k20csit@kiot.ac.in
- Nickname:** Use116961684242865419206 [\[Edit\]](#)
- Title:** worker
- Company:** kiot bank
- Department:** Sales
- Division:**
- Address:** 4/194, ariyampalayam, uthamasolapuram, Parakkadu, salem- 636308 SALEM 636308 TAMIL NADU
- 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:** [\[Edit\]](#)

**User Role:** Salesforce Platform Profile: salesmanage

**Screenshot 2: Gmail inbox - Salesforce welcome email**

This screenshot shows an incoming email in a Gmail inbox. The subject is "Welcome to Salesforce!" and the body contains the following text:

Welcome to Salesforce!

Click below to verify your account.

[Verify Account](#)

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

Username:  
`2k20csit@kiot.ac.in`

Again, welcome to Salesforce!

At the bottom of the email are "Reply" and "Forward" buttons.

**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

Recently Viewed

Bank customers Home

Search...

New

Bank Name

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

List View

Recently Viewed | customers | S

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

Incognito (3) Finish update

kiot Bank customers Home

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

This screenshot shows the Salesforce Lightning interface. The top navigation bar includes links for 'Recently Viewed', 'customers', and 'Home'. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled 'Recently Viewed' under the 'customers' category. It displays a message stating 'You haven't viewed any customers recently.' with a suggestion to 'Try switching list views.' There is also a 'customer Name' search field. At the bottom left, there is a link to 'List View'.

(9) WhatsApp

Salesforce Developer Session

(128) Top Hits 2023

Permission Sets | Salesforce

Welcome to Salesforce: Ve

Reset Password | Salesforce

Finish update

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

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Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

SETUP

Permission Sets

Help for this Page

All Permission Sets | Edit | Delete | Create New View

New

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

1-25 of 29 0 Selected

Previous Next

Page 1 of 2

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

This screenshot shows the Salesforce Setup interface. The left sidebar lists various settings like 'User Management Settings', 'Feature Settings', and 'User Interface'. The main content area is titled 'Permission Sets' under the 'SETUP' section. It displays a table of permission sets with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table includes rows for 'Access\_to\_activity', 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Supervisor', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience\_Profile\_Manager', 'Facility Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order Management\_Agent', 'Order Management\_Operations\_Manager', and 'Order Management\_Shopper'. At the bottom, there are pagination controls and a note indicating 1-25 of 29 results.

## 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

User A, and records owned by User B are shared with User B.

### Ownership:

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

### Organization-Wide Defaults:

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

### Testing:

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

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

The URL in the browser bar is [artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/home](https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/home).

The page title is "Permission Sets".

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

- Permission Set Groups
- Permission Sets** (selected)
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
  - Users
- Feature Settings
  - Data.com
    - Prospector Users
  - Service
    - Embedded Service
      - Messaging for In-App and Web User Verification
  - User Interface
    - Action Link Templates
    - Actions & Recommendations
- App Menu

The main content area displays a table of permission sets:

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Access_to_activity	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer_Manager	Denotes that the user is a Sales Cloud or Service Cloud user	CRM User
<input type="checkbox"/>	CRM_User	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Commerce_Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Admin	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Agent	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Experience_Profile_Manager	Lets users create, read, edit, and delete locations, sublocations, queu...	Salesforce
<input type="checkbox"/>	Facility_Manager	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Agent	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Operations_Manager	Limited access to Order Management features for Self Service	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Shopper		

Page 1 of 2

Salesforce Developer Session | Lightning | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43 | Reset Password | Salesforce

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

Setup Home Object Manager

Search Setup

Cloud icon

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

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Permission Sets

Create

Help for this Page

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

Cloud icon

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

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App Menu

SETUP

Permission Sets

Create

Help for this Page

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

Salesforce Developer Session | Lightning | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43 | Reset Password | Salesforce

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

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

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App Menu

SETUP

Permission Sets

Create

Help for this Page

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

Cloud icon

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

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User Management Settings

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Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Permission Sets

Create

Help for this Page

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

**Permission Sets**

**salesmanager**

**Permission Set Overview**

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

**Apps**

- Assigned Apps**: Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**: Permissions to execute Apex classes
- Visualforce Page Access**: Permissions to execute Visualforce pages
- External Data Source Access**: Permissions to authenticate against external data sources
- Flow Access**: Permissions to execute Flows

**Object Settings**

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

Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce: Venkatesh

Reset Password | Salesforce

Finish update

Setup Home Object Manager

Search Setup

Video Tutorial | Help for this Page

Permission Set Overview > Object Settings Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Save Cancel

Object Settings Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Save Cancel

Object Settings Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Salesforce Setup interface showing the creation of a Permission Set Assignment.

The top window shows the "Current Assignments" screen for the "salesmanager" permission set. It displays a cactus and sun illustration with the message "No assignments defined." The sidebar navigation includes "Users", "Permission Sets", and "User Interface".

The bottom window shows the "Select Users to Assign" screen. It lists users under the heading "All Users" with 1 item selected. The user "madhu b" is selected (indicated by a checked checkbox). Other users listed include Amelia Ellington, Chatter Expert, Diya Adanna, GOPAL S, Integration User, Security User, and sowmiya bala. The "Next" button is visible at the bottom right.

Salesforce Setup interface showing the assignment of a permission set to a user.

The top window shows the "Select an Expiration Option FOR Assigned Users" screen. The "No expiration date" option is selected. A table lists a single user, "madhu b", assigned to the "salesmanager" profile, with "Salesforce Platform" as the User License and "Never Expires" as the Expires On date. A "Time Zone" dropdown is also present.

The bottom window shows the "Assignment Summary" screen after the assignment was completed. It displays the same user information: "madhu b" assigned to "salesmanager" profile, "Salesforce Platform" User License, and "Success" status. A green success message at the top states "1 assignments were successful." A "Done" button is visible at the bottom right.

Recently Viewed | customers | S | +

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

Incognito (3) Finish update

kiot Bank customers Home

Search...

Recently Viewed

customers

customer Name

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

LIST VIEW CONTROLS

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

javascript:void(0)

Detailed description: This screenshot shows a Salesforce Lightning interface for managing customer records. The main title is 'Recently Viewed' under the 'customers' object. The list view displays one column named 'customer Name'. A message at the bottom of the list area says, 'You haven't viewed any customers recently. Try switching list views.' On the right side, a context menu is open with several options: 'New' (highlighted in orange), 'Clone', 'Rename', 'Sharing Settings', 'Show List Filters', 'Select Fields to Display', 'Delete', and 'Reset Column Widths'. The browser's address bar shows the specific URL for this list view. The top navigation bar includes links for 'kiot', 'Bank', 'customers', and 'Home', along with a search bar and various browser controls.

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:

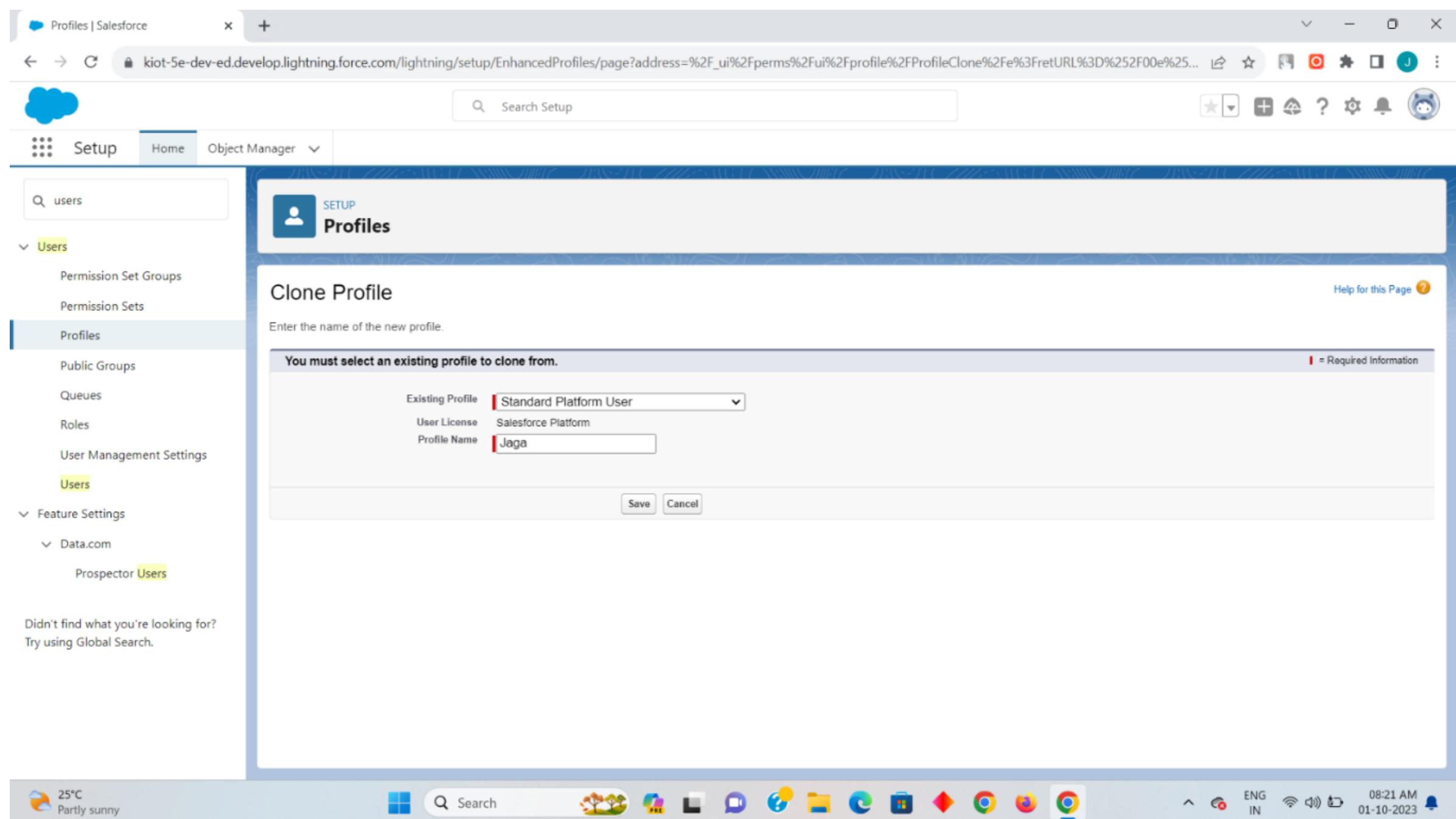
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit follow as per.

Setup-quick search[profile]

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is collapsed, and the main area displays a list of profiles. The list includes columns for Action, Profile Name, User License, and Custom. The User License column lists various Salesforce licenses such as Analytics Cloud Integration User, Authenticated Website, Chatter External, Chatter Free, Contract Manager, XOrg Proxy User, Salesforce, Customer Community Login, and Customer Community Plus. The Custom column contains several checked boxes. At the bottom of the list, it says "1-25 of 41" and "0 Selected".

## Step 2:

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



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

Step 3:

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

The image contains two screenshots of the Salesforce Setup interface, illustrating the steps to modify user profile permissions.

**Screenshot 1: Profile Detail View**

This screenshot shows the "Profile Detail" section for the "Jaga" profile. Key details include:

- Name:** Jaga
- User License:** Salesforce Platform
- Description:** (empty)
- Created By:** Jagadesh S. 01/10/2023, 8:21 am
- Modified By:** Jagadesh S. 01/10/2023, 8:21 am

**Page Layouts** section (partial view):

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

**Screenshot 2: Custom Object Permissions View**

This screenshot shows the "Custom Object Permissions" section. It includes sections for:

- Communication Subscription Channel Types:** A grid of checkboxes for various communication types.
- Custom Object Permissions:** A grid for managing permissions for providers and resources across basic access, data administration, and specific actions like view all and modify all.
- Session Settings:** Options for session times out after (2 hours of inactivity), session security level required at login (None), and different Experience Cloud login policies.

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

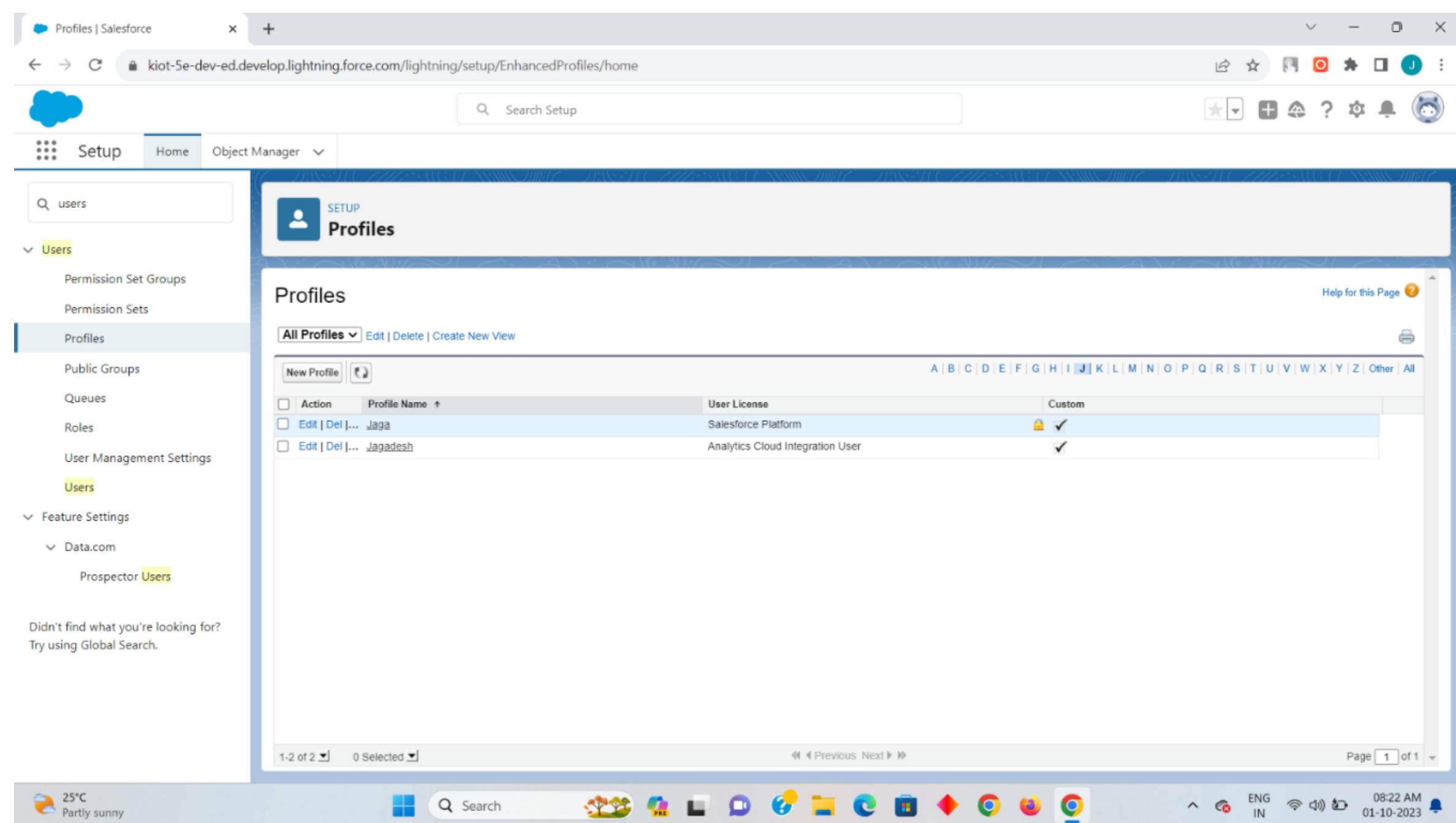
- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Top Navigation:** Setup, Home, Object Manager
- Left Sidebar:** Users (selected), Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings (Data.com, Prospector Users).
- Central Content:**
  - Profile Edit:** Jaga
  - Set the permissions and page layouts for this profile.
  - Profile Edit Form:**

Name	Jaga
User License	Salesforce Platform
Description	(Empty text area)
Custom Profile <input checked="" type="checkbox"/>	
  - Custom App Settings:**

	Visible	Default	Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>
Hive App (Hive_App)	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>
  - Service Provider Access:** (Section header)
  - Tab Settings:** (Section header)
    - Overwrite users' personal tab customizations

## 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



The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is collapsed, and the main content area is titled 'Profiles'. A sub-header 'All Profiles' is visible. The table lists two profiles:

Action	Profile Name	User License	Custom
<a href="#">Edit   Del</a>	Jaga	Salesforce Platform	✓
<a href="#">Edit   Del</a>	Jagadesh	Analytics Cloud Integration User	✓

At the bottom of the page, there are navigation links for '1-2 of 2' and '0 Selected', and a 'Page 1 of 1' indicator. The browser status bar at the bottom shows the URL 'kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home', the date '01-10-2023', and the time '08:22 AM'.

## Step 5:

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

Salesforce Setup - All Users

This screenshot shows the Salesforce Setup interface for managing users. The left sidebar is collapsed, showing the 'Users' section under 'User Management Settings'. The main content area displays a table of existing users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. A 'New User' button is at the top left of the table.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty_00d5f00000c8joseaf_6z9bkrrkd4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	Grey_Jane	jgray	jane_gray.fygnimmoaim.cz7d2kiogtn3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<a href="#">Edit</a>	S.Jaga	JS	jaga098@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	S.Jagadesh	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	S.Jagadesh	JS	jaga117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	User_Integration	Integ	integration@00d5f00000c8joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@00d5f00000c8joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Help for this Page ?

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

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

Salesforce Setup - New User

This screenshot shows the 'New User' creation page. The 'General Information' section is filled with sample data. In the 'Profile' dropdown, 'Jaga' is selected from a dropdown menu. The status bar shows the date as 01-10-2023 and time as 08:22 AM.

First Name: Jagadesh11  
Last Name: S  
Alias: JS  
Email: jww123@gmail.com  
Username: jww123@gmail.com  
Nickname: User169612875144962592  
Title:   
Company:   
Department:   
Division:

Role: Director, Channel Sales  
User License: Salesforce Platform  
Profile: **Jaga** (selected)  
Active:   
Marketing User: Standard Platform User  
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type:  (Default Limit: 300)  
Accessibility Mode (Classic Only):   
High Contrast Palette on Charts:

Help for this Page ?

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

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

Salesforce Setup - New User

This screenshot shows the 'New User' creation page again. The 'General Information' section is filled with sample data. In the 'Profile' dropdown, 'Jaga' is selected from a dropdown menu. The status bar shows the date as 01-10-2023 and time as 08:23 AM.

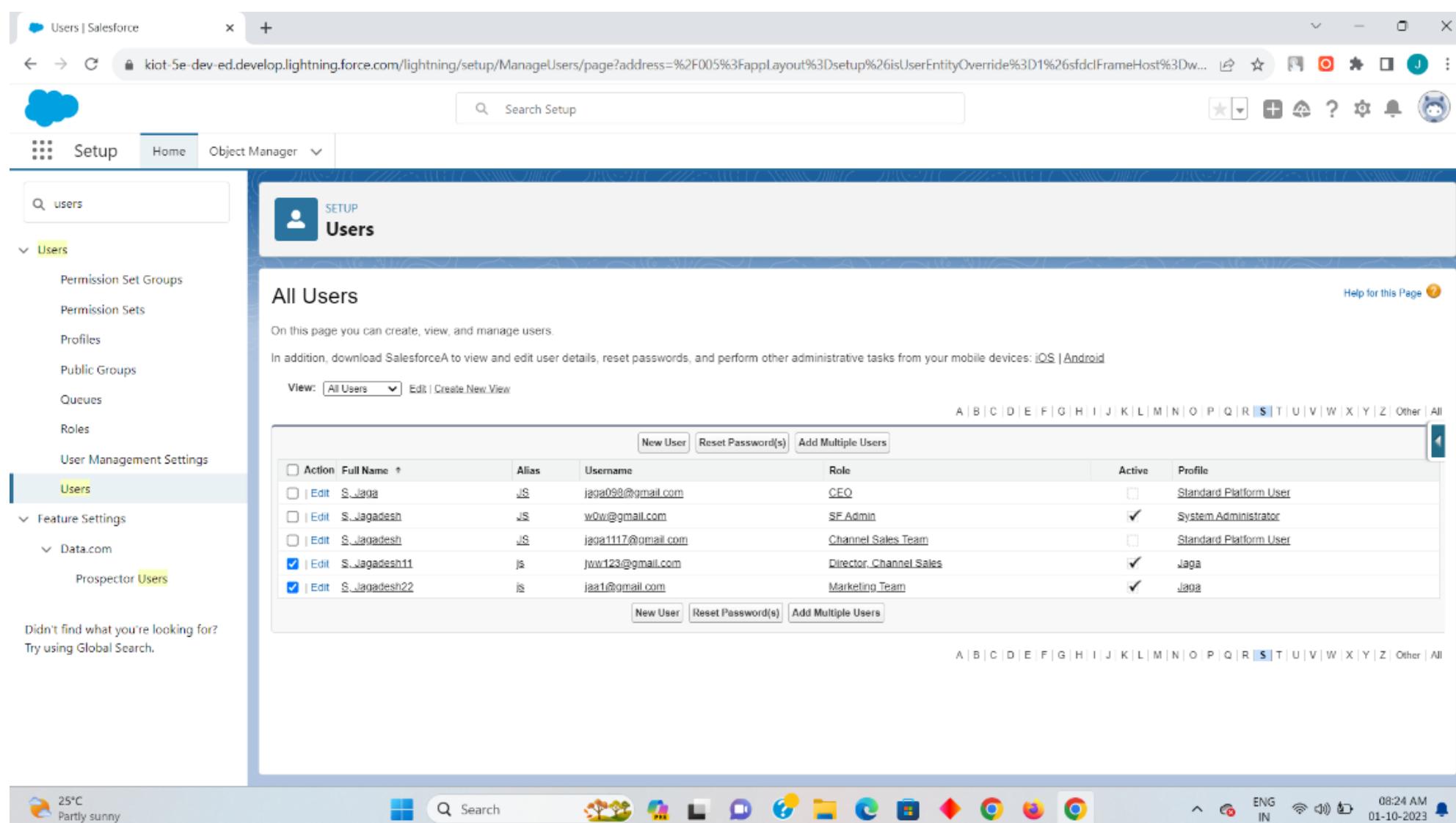
First Name: Jagadesh22  
Last Name: S  
Alias: JS  
Email: jaa1@gmail.com  
Username: jaa1@gmail.com  
Nickname: User169612879983618745  
Title:   
Company:   
Department:   
Division:

Role: Marketing Team  
User License: Salesforce Platform  
Profile: **Jaga** (selected)  
Active:   
Marketing User: Standard Platform User  
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type:  (Default Limit: 300)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

Help for this Page ?

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

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



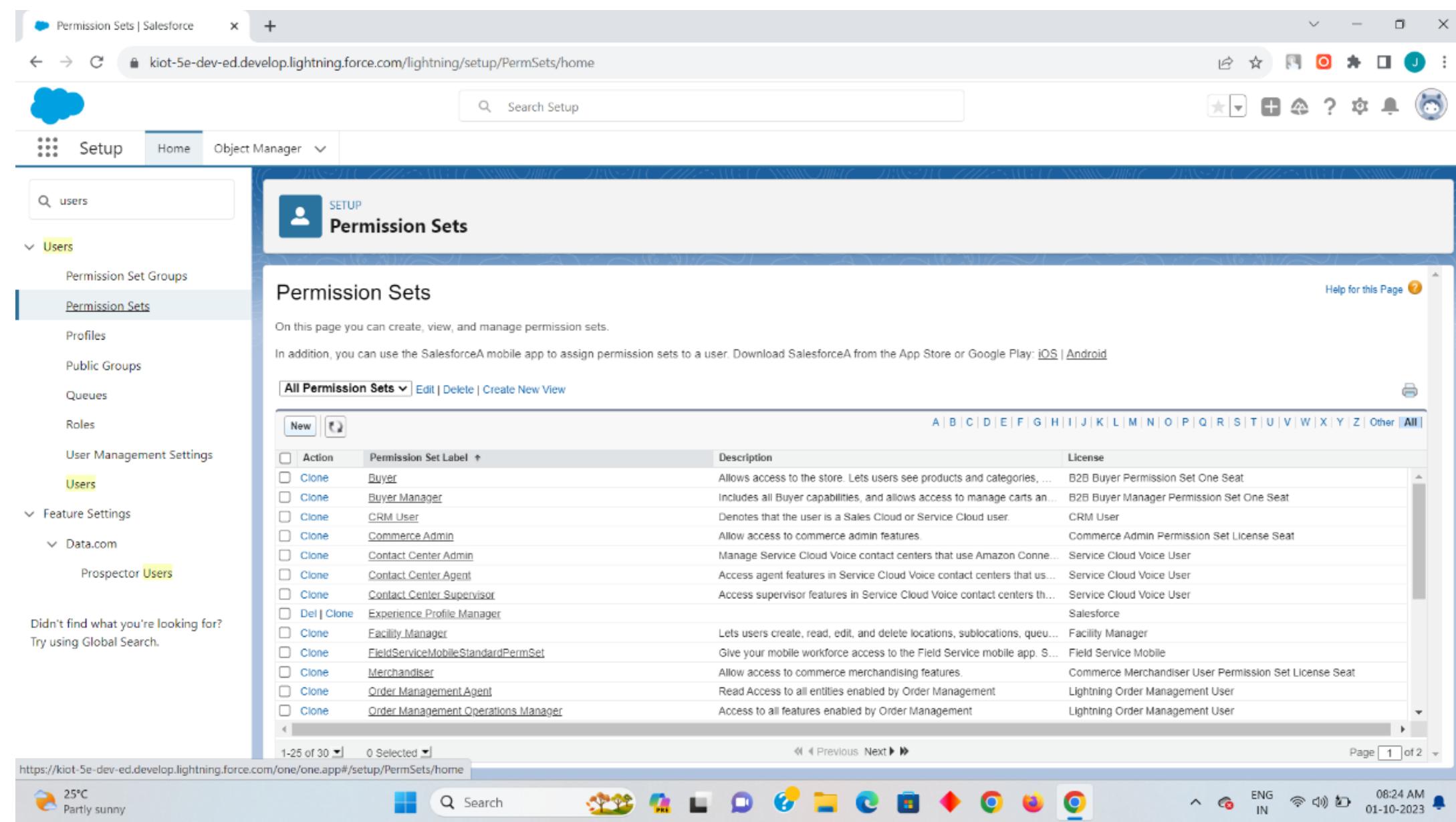
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

## 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

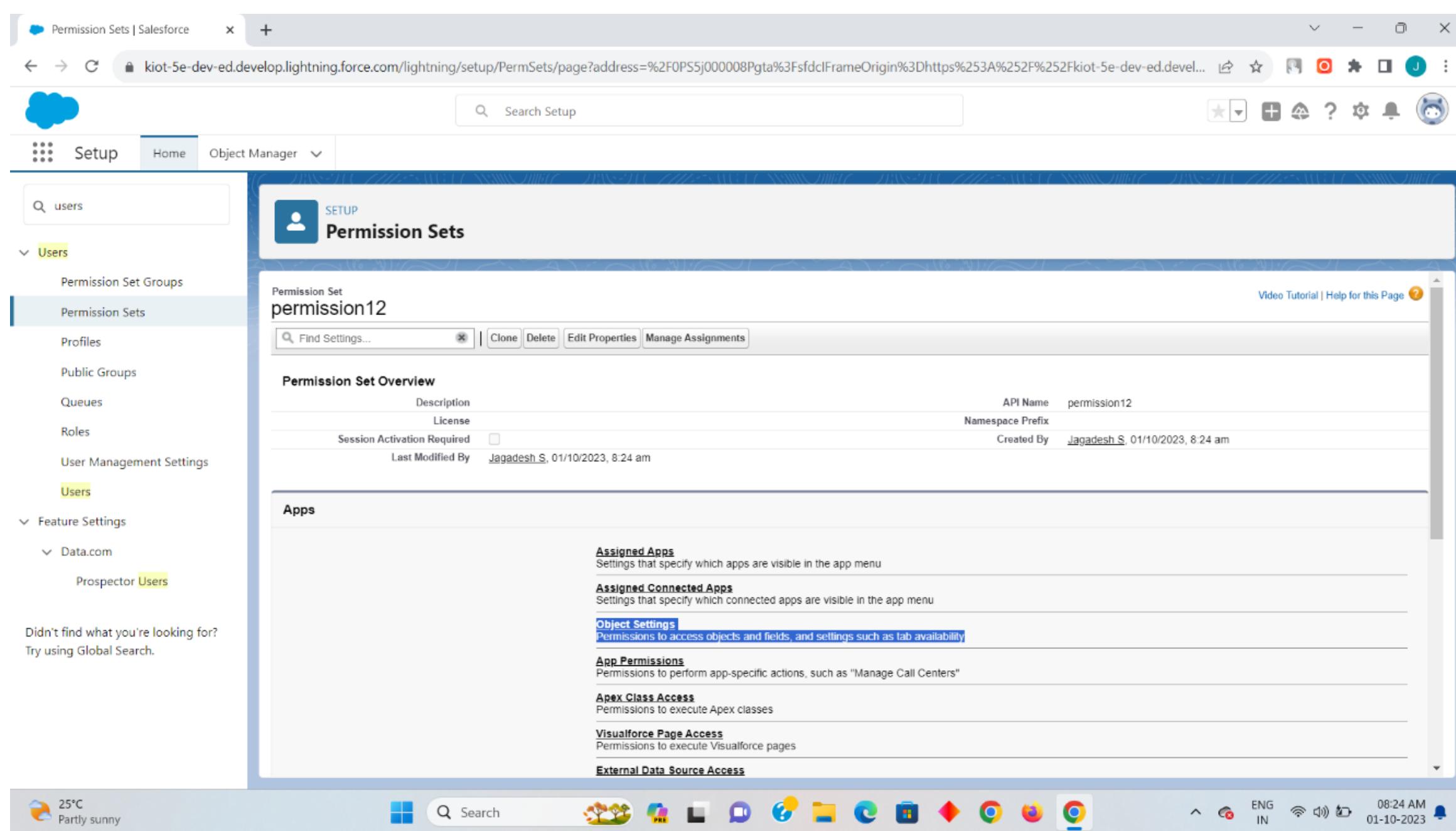
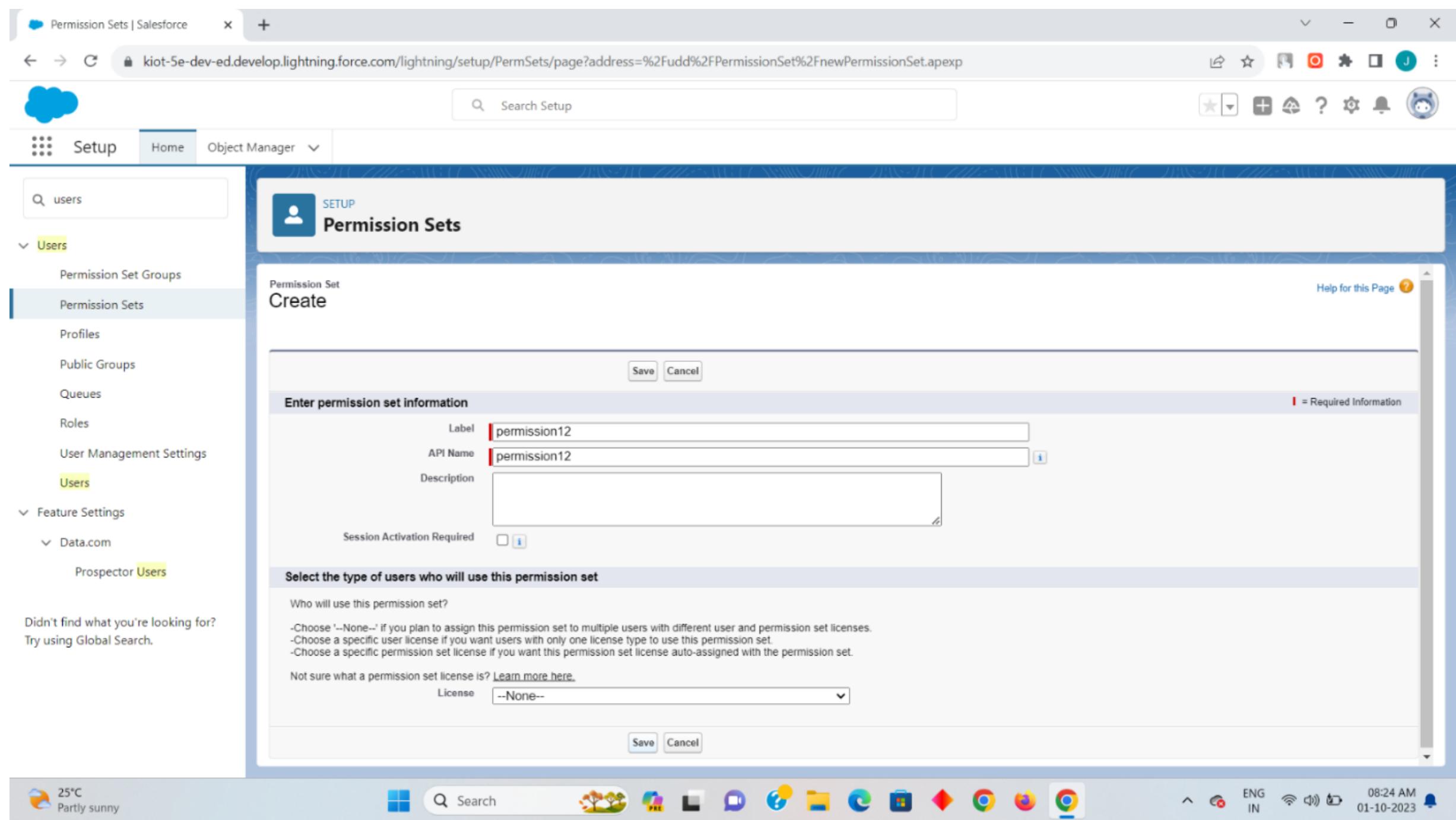
setup-quick search[permission set]-new-fill

label name[auto select the API name]-click on  
save-object settings-accounts.



The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar is collapsed, and the main content area displays a list of permission sets. The list includes columns for Action, Permission Set Label, Description, and License. The 'Permission Set Label' column is currently sorted by label. The 'Description' column provides a brief overview of the permissions granted by each set. The 'License' column indicates the specific license required for each set. The list contains 30 items, with the first few being 'Buyer', 'Buyer Manager', 'CRM User', and 'Commerce Admin'. The interface includes standard Salesforce navigation elements like a search bar, a help icon, and a toolbar at the top.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone	Buyer	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	CRM User	CRM User
<input type="checkbox"/>	Clone	Commerce Admin	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Contact Center Admin	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Agent	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Supervisor	Service Cloud Voice User
<input type="checkbox"/>	Del   Clone	Experience Profile Manager	Salesforce
<input type="checkbox"/>	Clone	Facility Manager	Facility Manager
<input type="checkbox"/>	Clone	FieldServiceMobileStandardPermSet	Field Service Mobile
<input type="checkbox"/>	Clone	Merchandiser	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Clone	Order Management Agent	Lightning Order Management User
<input type="checkbox"/>	Clone	Order Management Operations Manager	Lightning Order Management User



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

- Header:** The title bar displays "Permission Sets | Salesforce" and the URL "kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Pgta%3Fs%3DEntityPermissions".
- Left Sidebar:** The sidebar includes a blue cloud icon, a search bar with "users", and a navigation menu:
  - Users:** "Permission Set Groups", "Permission Sets" (selected), "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings", "Users" (highlighted in yellow).
  - Feature Settings:** "Feature Settings" (highlighted in yellow), "Data.com", "Prospector Users".
  - A message: "Didn't find what you're looking for? Try using Global Search."
- Top Bar:** Includes icons for Home, Object Manager, and various system settings.
- Search Bar:** A search bar at the top right with the placeholder "Search Setup".
- Main Content:** The "Permission Sets" page for "permission12".
  - Header:** "SETUP" and "Permission Sets".
  - Actions:** "Find Settings...", "Clone", "Delete", "Edit Properties", "Manage Assignments".
  - Breadcrumbs:** "Permission Set Overview" > "Object Settings".
  - Section:** "Object Settings".
  - Table:** A grid showing object permissions. The columns are "Object Name", "Object Permissions", "Total Fields", and "Tab Settings". The rows include:

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	--

Permission Sets | Salesforce x + v - 0 x

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008PgtA%3Fs%3DEntityPermissions%26o%3DAccount

Cloud Search Setup Search Setup Star Help Feedback Settings Logout

Setup Home Object Manager Users

users

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

Permission Sets SETUP Video Tutorial Help for this Page

permission12

Find Settings... \* Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Accounts

Accounts Edit

Object Permissions

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

Field Permissions

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

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

25°C Partly sunny Search Cloud File Help ENG IN Wi-Fi Speaker 08:25 AM 01-10-2023

## Step 7:

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

The screenshots show the Salesforce Setup interface for managing Permission Sets. In the 'Object Permissions' section for the 'Accounts' object, the 'Delete' permission is initially unchecked. After being checked and the page saved, the permission is now enabled.

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

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

## Step 8

Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then

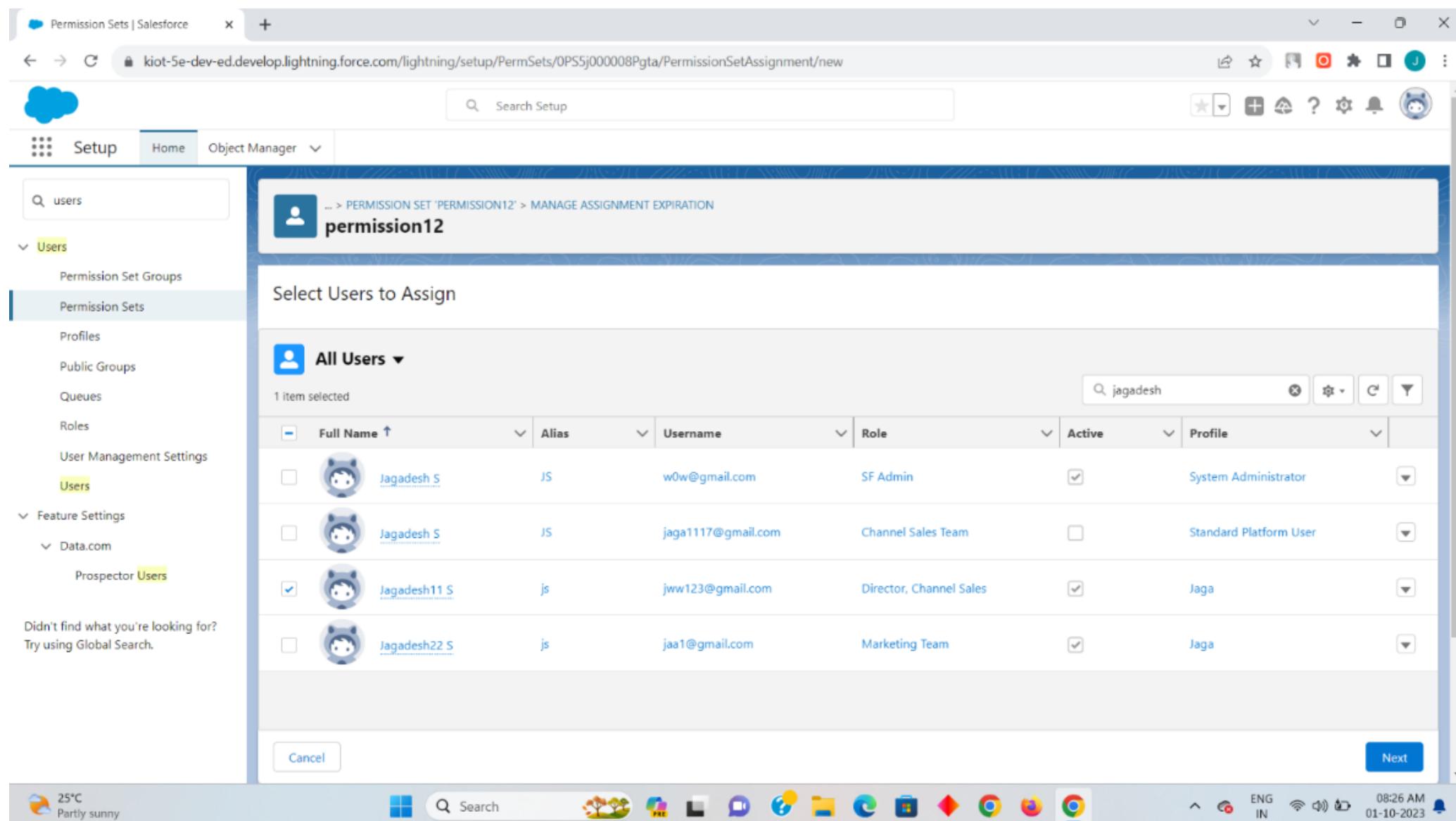
click on assign so that the specific selected user can have a special access as delete on it.

This screenshot shows the 'Permission Sets | Salesforce' page in the Salesforce setup. The left sidebar is expanded, showing sections like 'Permission Set Groups', 'Permission Sets' (which is selected), 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The main content area is titled 'permission12' and shows a section titled 'Current Assignments' with a sub-section 'No assignments defined.' Below this is a decorative illustration of a cactus and sun. At the bottom of the main content area, there is a message: 'Didn't find what you're looking for? Try using Global Search.'

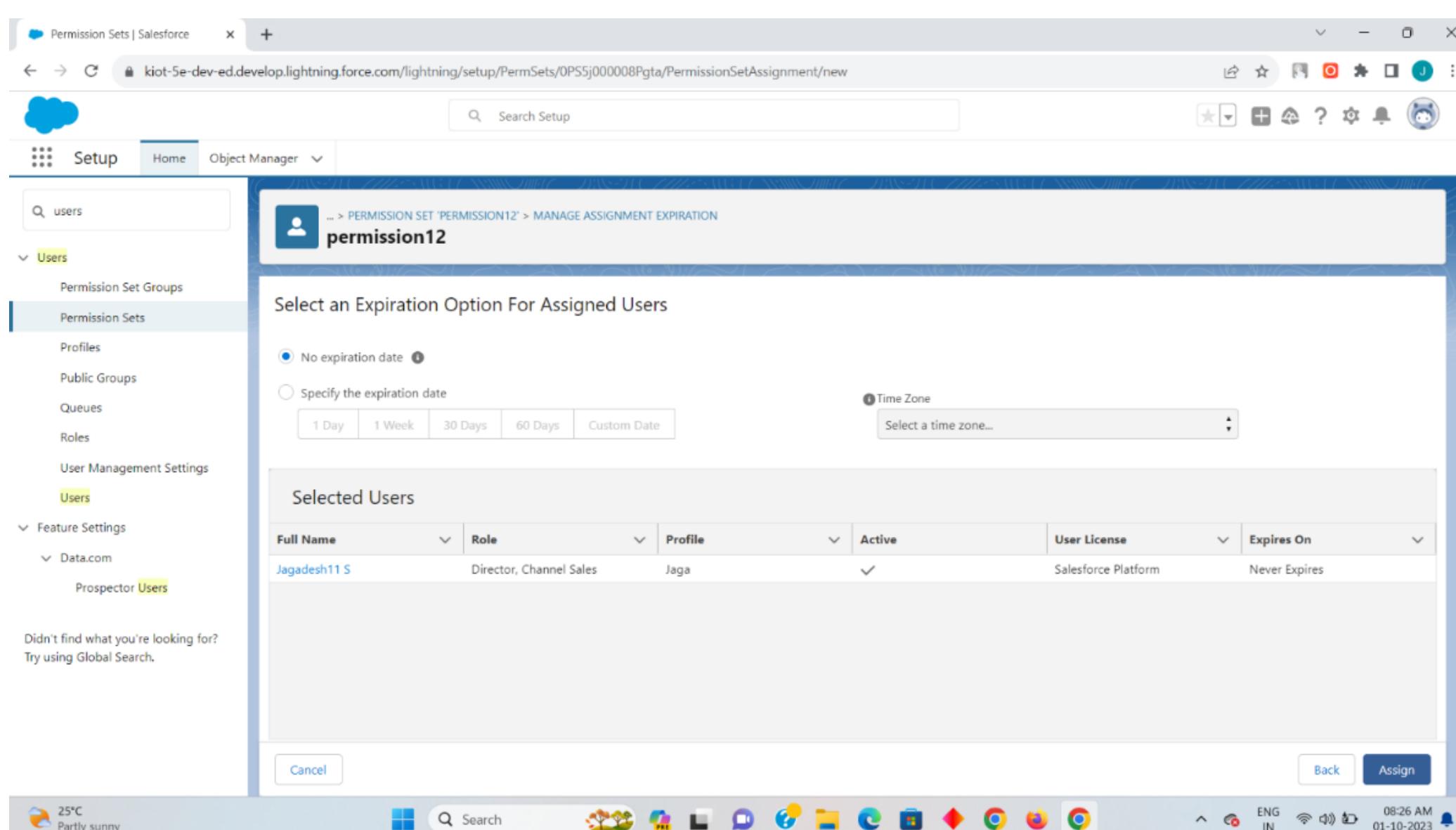
This screenshot shows the 'Manage Assignment Expiration' step of the permission set assignment process. The left sidebar is identical to the previous screenshot. The main content area is titled 'permission12 > PERMISSION SET 'PERMISSION12' > MANAGE ASSIGNMENT EXPIRATION'. It has a sub-section titled 'Select Users to Assign' with a heading 'All Users'. A search bar at the top of this list contains the text 'jagadesh'. Below the search bar is a table with columns: 'Full Name', 'Alias', 'Username', 'Role', and 'Actions'. There are four users listed:

Full Name	Alias	Username	Role	Actions
Jagadesh S	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/> System Administrator
Jagadesh S	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/> Standard Platform User
Jagadesh11 S	js	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/> Jaga
Jagadesh22 S	js	jaa1@gmail.com	Marketing Team	<input checked="" type="checkbox"/> Jaga

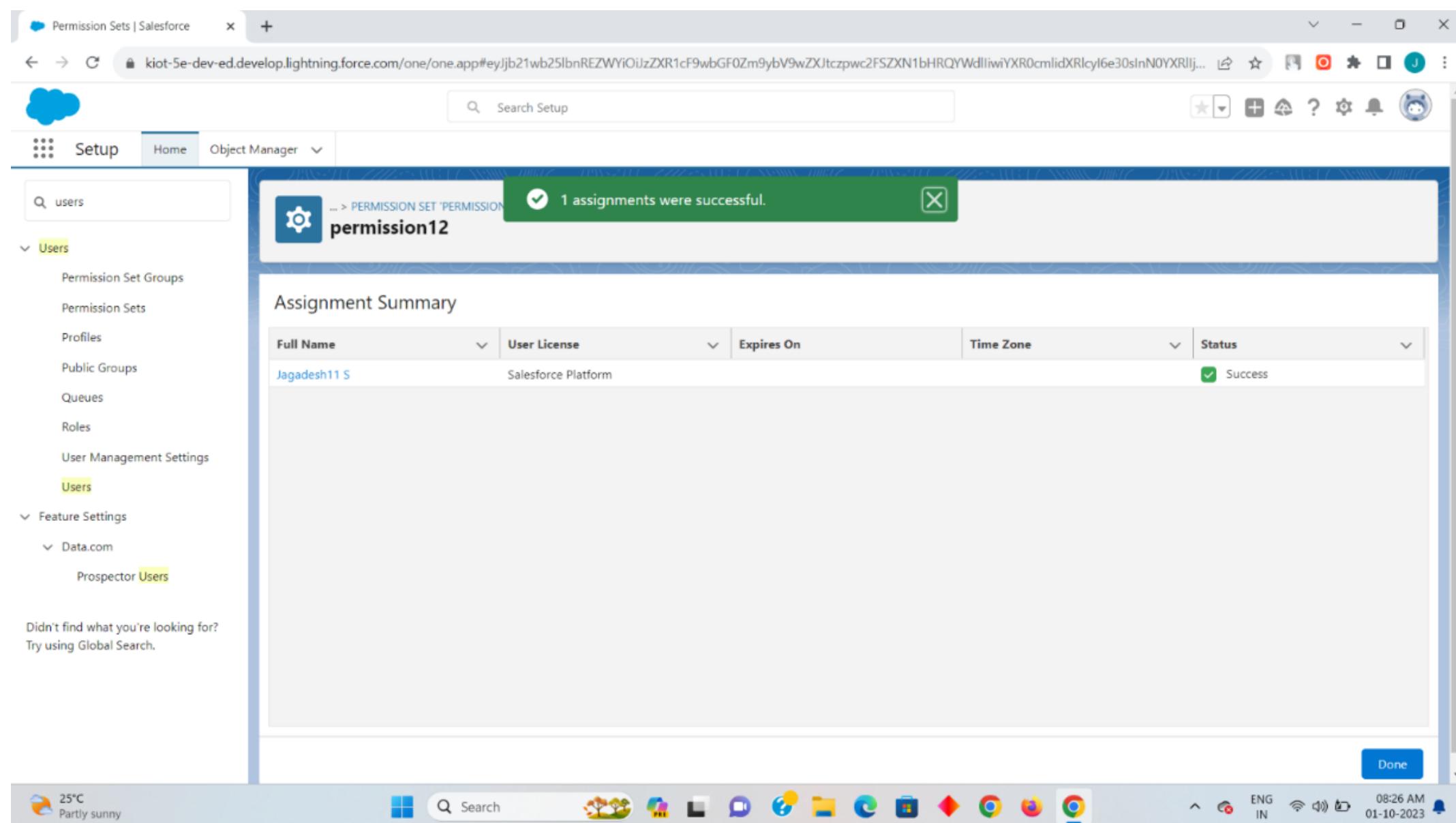
At the bottom of the list, there are 'Cancel' and 'Next' buttons. The status bar at the bottom of the browser window shows '08:26 AM 01-10-2023'.



Click on next.



Now click on Assign.



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

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

Solution:

Step 1: Create a Custom Object

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

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

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	Survey Result Name	Name	Auto Number		✓	
Search Layouts						
Search Layouts for Salesforce Classic						
Triggers						
Validation Rules						

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

1. Click **AppLauncher**.
2. In the Quick Find box, type **Email Templates**.
3. Clicks on the **NewEmail template** button.
4. **Name the Lightning Email Template** and make sure to store it in the **PublicEmail Templates** folder.

## 5. Create a template like the following screenshot.

The screenshot shows the 'Email Template' page in Salesforce. The title bar says 'Email Template' and 'Thank You Email - Survey'. The top right has buttons for 'Edit in Builder', 'Edit', 'Clone', and a dropdown. Below is a 'Details' tab and a 'Related' tab. Under 'Information', there's a 'Description' section with fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Related Entity Type' (set to 'Survey Result'), 'Folder' (set to 'Public Email Templates'), and a checked 'Made in Email Template Builder' checkbox. In the 'Message Content' section, the 'Subject' is 'Thank You For Completing Our Survey!' and the 'HTML Value' contains a personalized message: 'Hi {{Survey\_Result\_\_c.Name\_\_c}}, Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation. Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.' It also credits 'Thanks, Automation Champion'. At the bottom, under 'Additional Information', it shows 'Created By' Rakesh Gupta, 12/21/2020, 4:23 PM and 'Last Modified By' Rakesh Gupta, 12/21/2020, 4:32 PM.

## Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.

3. Select **Email Alerts**, click on the **NewEmail Alert** button.
4. Name the **Email Alert** and click the Tab button. The **UniqueName** will populate.
5. For **Object** select **SurveyResult**.
6. For the **Email Template** chooses **Lightning Email Template Thank YouEmail – Survey**.
7. For **RecipientType** 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 <small>i</small>								
Object	Survey Result								
Email Template	Thank You Email - Survey <small>?</small>								
Protected Component	<input type="checkbox"/>								
Recipient Type	Search: User <small>?</small> for: <input type="text"/> Find								
Recipients	<table border="1"> <tr> <th>Available Recipients</th> <th>Selected Recipients</th> </tr> <tr> <td>User: Integration User User: Rakesh Gupta User: Security User</td> <td>Email Field: Email</td> </tr> <tr> <td>Add <small>▶</small></td> <td></td> </tr> <tr> <td>Remove <small>◀</small></td> <td></td> </tr> </table>	Available Recipients	Selected Recipients	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email	Add <small>▶</small>		Remove <small>◀</small>	
Available Recipients	Selected Recipients								
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email								
Add <small>▶</small>									
Remove <small>◀</small>									
You can enter up to five (5) email addresses to be notified.									
Additional Emails	<input type="text"/>								
From Email Address	<input type="text"/> Current User's email address <small>?</small> <input type="checkbox"/> Make this address the default From email address for this object's email alerts <small>i</small>								

Save    Save & New    Cancel

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

1. Click **Setup**.
2. In the Quick Find box, type **Flows**.
3. Select **Flows** then click on the **New Flow**.
4. Select the **Screen Flow** option and click on **Next** and configure the flow as follows:
  1. How do you want to start building: **Freeform**

5. We will use the **Screen** element to capture a **Surveyresponse** form. Drag and drop a **Screen** element onto the canvas.

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

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

3. Row 2:

  1. **Field: Email\_c**
  2. **Value: {!Email.value}**
4. Click **Add Row**
5. Row 3:

  1. **Field: Name\_c**
  2. **Value: {!Name.firstName}**  
**{!Name.lastName}**
6. Click **Add Row**
7. Row 3:

  1. **Field: Rating\_c**
  2. **Value: {!Rating}**
7. Click **Done.**

Edit Create Records

Create Salesforce records using values from the flow.

* Label	* API Name
Save Response	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	A_a Comment
Email__c	A_a Email > Value
Name__c	{!Name.firstName} {!Name.lastName}
Rating__c	A_a Rating

+ Add Field

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.

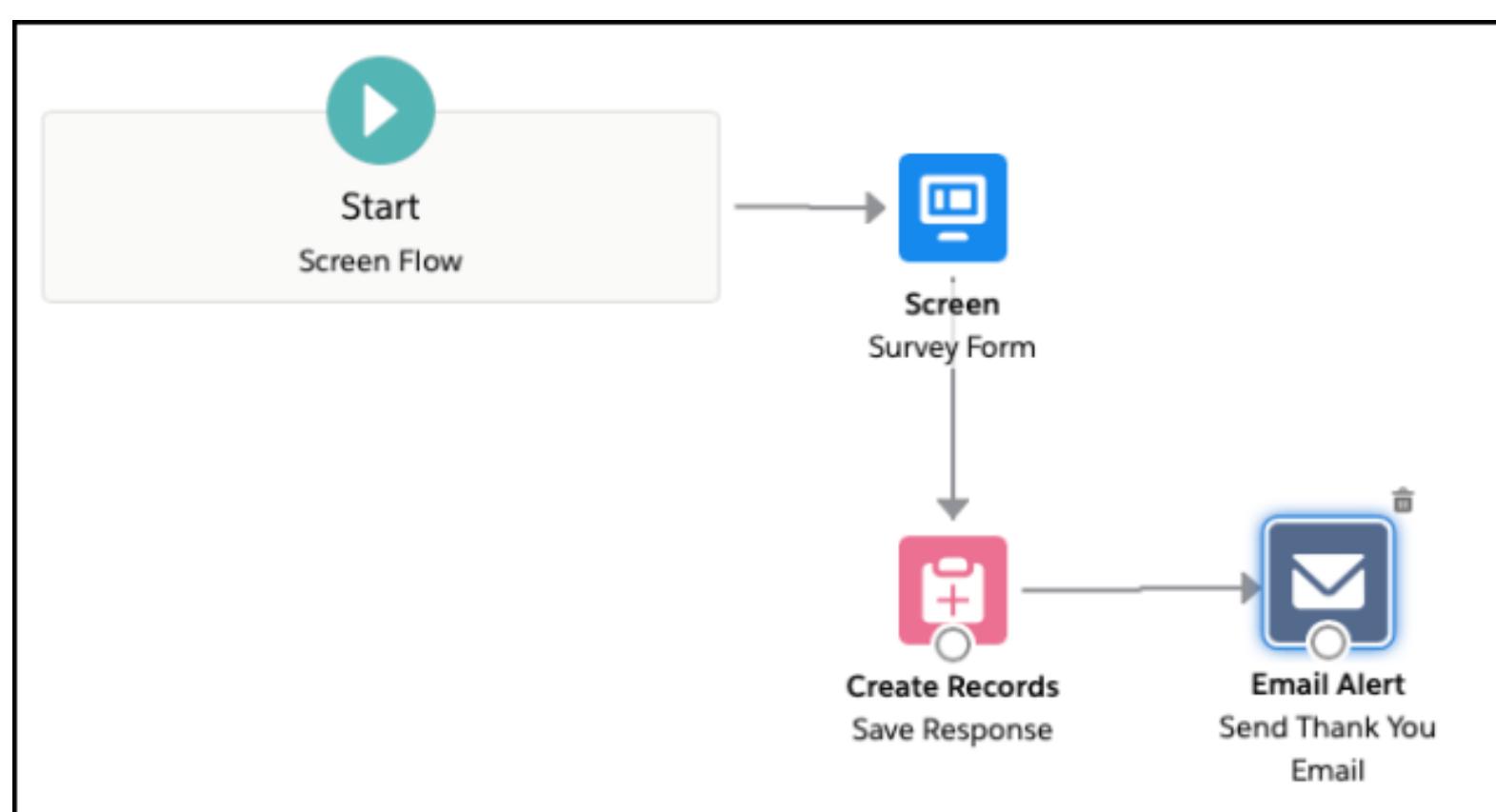
3. In the **Action** box, type **Survey – Thank You Email**.
4. Clicks on the **Survey – Thank You Email** email alert.
5. Click **Done**.

Edit "Survey - Thank You Email" email alert

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

*Label	*API Name
Send Thank You Email	Send_Thank_You_Email
Description	
<input type="text"/>	
Set Input Values	
A3 *Record ID	(!Save_Response)
<input type="button" value="Cancel"/> <input type="button" value="Done"/>	

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



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

- 3. Click Show Advanced.**
- 4. How to Run the Flow: User or System Context— Depends on How Flow is Launched**
- 5. Type: Screen Flow**
- 6. API Version for Running the Flow: 51**
- 7. Interview Label: Survey  
{!\$Flow.CurrentDateTime}**
- 8. Click Save.**

Save as

A New Version A New Flow

\* Flow Label Survey \* Flow API Name Survey

Description

Hide Advanced

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

\* Type Screen Flow

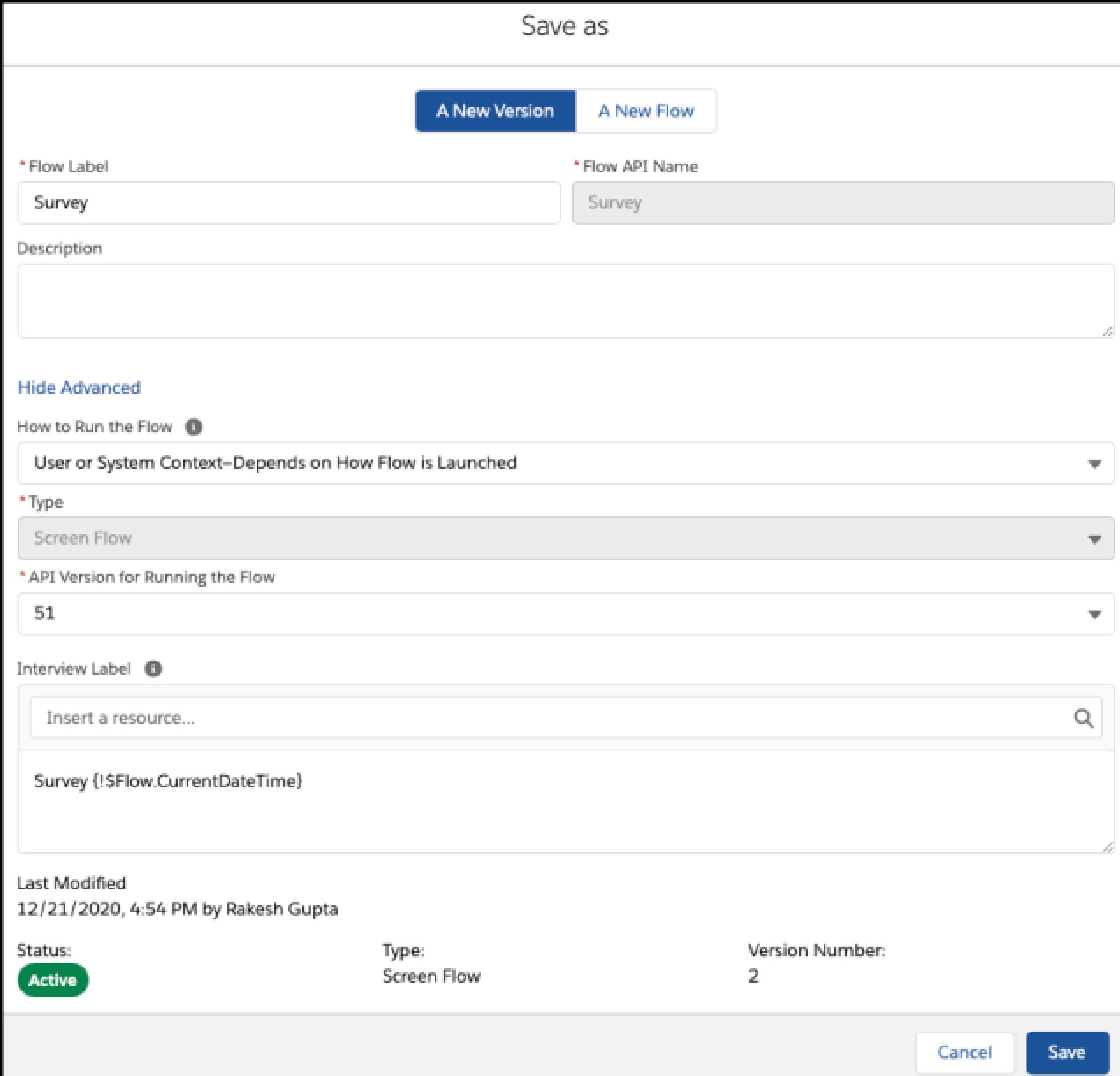
\* API Version for Running the Flow 51

Interview Label i  
Insert a resource... 🔍  
Survey {!\$Flow.CurrentDateTime}

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

Status: Active Type: Screen Flow Version Number: 2

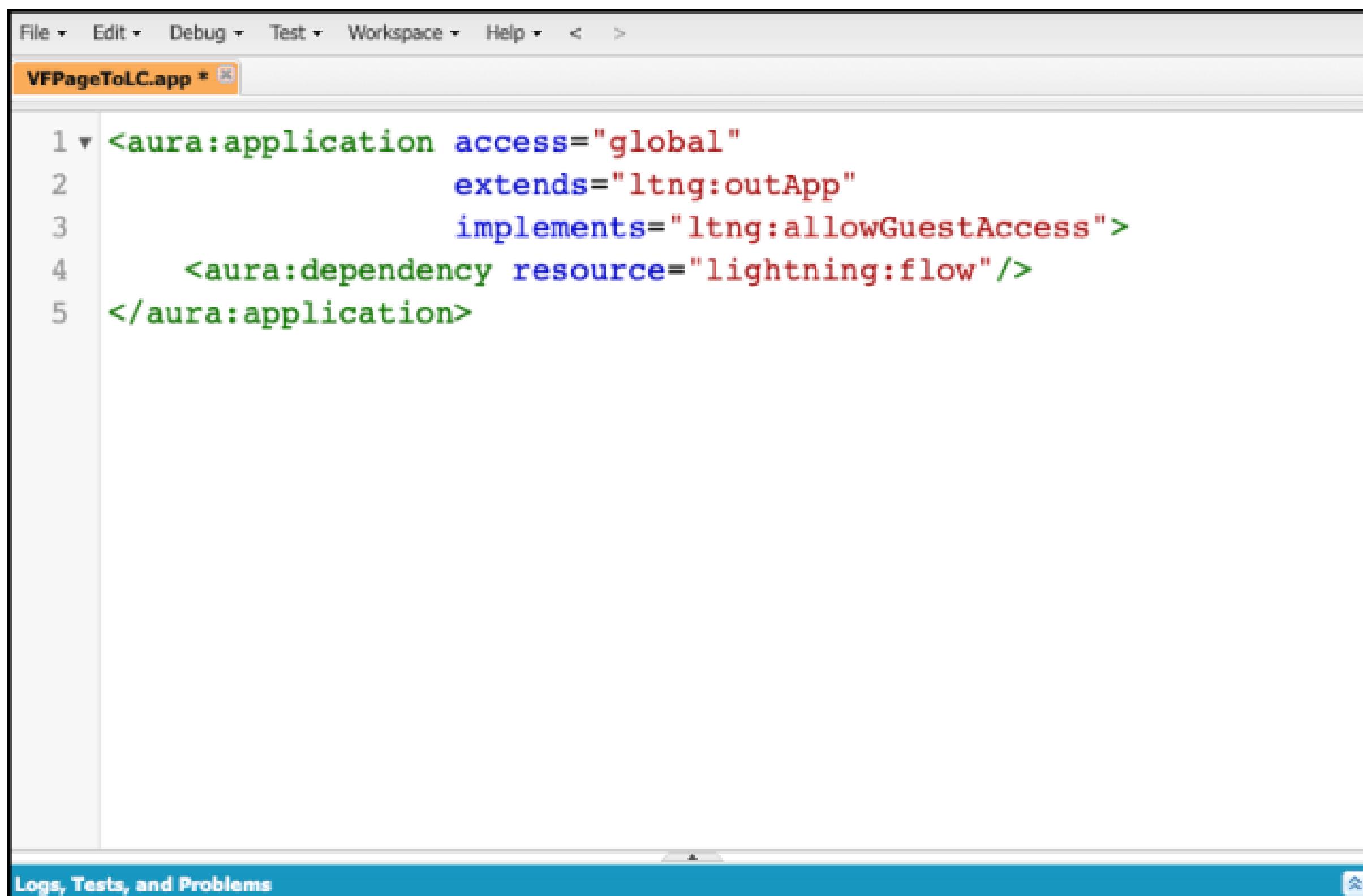
Cancel Save



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

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

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



The screenshot shows the Salesforce IDE interface with the title bar "File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >" and the file tab "VFPageToLC.app \*". The main editor area contains the following code:

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

The code defines a Lightning Application component named "VFPageToLC.app" that extends "ltng:outApp" and implements "ltng:allowGuestAccess". It includes a dependency on the "lightning:flow" component.

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

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

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

Then write a JavaScript function that creates the component on the page  
using **\$Lightning.createComponent()**

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

The screenshot shows the Visualforce Page Editor for a page named 'Survey'. The 'Page Information' section includes fields for Label ('Survey'), Name ('Survey'), and Description. Under 'Available for Lightning Experience, Experience Builder sites, and the mobile app', the 'Check' box is selected. Under 'Require CSRF protection on GET requests', the 'Check' box is unselected. Below the editor, the 'Visualforce Markup' tab is active, displaying the following code:

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

```

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

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

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

Site Edit

Save Cancel

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

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

## Proof of Concept

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

The form has the following fields:

- Name
- First Name: Alok
- Last Name: Sinfal
- \*Email: (redacted)
- \*Rating: 5
- \*Comment: Awesome Blog

At the bottom right is a blue "Next" button.

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

