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Salesforce Developer(Course)
Assignment no 1

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Zone no : Zone 8

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

Solution:

Step 1: Create Custom Objects

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

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" > "New Custom Object".
- Title Bar:** "SETUP" and "New Custom Object".
- Page Content:**
 - New Custom Object**
 - A message bar: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)"
 - Custom Object Definition Edit** (Buttons: Save, Save & New, Cancel)
 - Custom Object Information** (Required Information)
 - The singular and plural labels are used in tabs, page layouts, and reports.
 - Label:** college (Example: Account)
 - Plural Label:** colleges (Example: Accounts)
 - Starts with vowel sound:**
 - The Object Name is used when referencing the object via the API.
 - Object Name:** college (Example: Account)
 - Description:** (Large text area)
 - Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
 - Content Name:**
 - Enter Record Name Label and Format** (Required)
 - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
 - Record Name:** college Name (Example: Account Name)
 - Data Type:**
 - Optional Features**
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing (i)
 - Object Classification**
 - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).
 - Allow Sharing
 - Allow Bulk API Access
 - Allow Streaming API Access
 - Deployment Status**
 - In Development
 - Deployed
 - Search Status**
 - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).
 - Allow Search
 - Object Creation Options (Available only when custom object is first created)**
 - Add Notes and Attachments related list to default page layout
 - Launch New Custom Tab Wizard after saving this custom object
- Buttons at the bottom:** Save, Save & New, Cancel.

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A message at the top indicates that permissions for the new object are disabled by default. The main form is titled 'Custom Object Definition Edit' and contains sections for 'Custom Object Information', 'Enter Record Name Label and Format', 'Optional Features', 'Object Classification', 'Deployment Status', and 'Search Status'. The 'Custom Object Information' section includes fields for Label ('department'), Plural Label ('departments'), and Object Name ('department'). The 'Enter Record Name Label and Format' section includes a 'Record Name' field set to 'Department Name' and a 'Data Type' dropdown set to 'Text'. The 'Optional Features' section has several checkboxes for reports, activities, history, and groups, all of which are unchecked. The 'Object Classification' section has three checked checkboxes: 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has an unchecked checkbox for 'Allow Search'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Step 2: Create a Master-Detail Relationship

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

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

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

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

Details

Fields & Relationships	Description
Page Layouts	API Name
Lightning Record Pages	CDepartment__c
Buttons, Links, and Actions	Custom
Compact Layouts	✓
Field Sets	Singular Label
Object Limits	CDepartment
Record Types	Plural Label
Related Lookup Filters	CDepartments
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	

Edit Delete

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

Details

Fields & Relationships

New Relationship

Step 3. Enter the label and name for the lookup field Step 3 of 6

Help for this Page Previous Next Cancel

Field Label	college
Field Name	college
Description	
Help Text	
Child Relationship Name	CDepartments
Sharing Setting	Select the minimum access level required on the Master record to create, edit, or delete related Detail records: <input checked="" type="radio"/> Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records. <input type="radio"/> Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting	<input type="checkbox"/> Child records can be reparented to other parent records after they are created
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entry

Lookup Filter

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "CDepartment New Relationship" and "Step 2. Choose the related object". It shows a dropdown menu set to "college". Navigation buttons at the top right include "Help for this Page", "Step 2 of 6", "Previous", "Next", and "Cancel".

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various object settings. The main area is titled "CDepartment New Custom Field" and "Step 1. Choose the field type". It shows a "Data Type" section with several options: "None Selected", "Auto Number", "Formula", "Roll-Up Summary", "Lookup Relationship", "Master-Detail Relationship" (which is selected), and "External Lookup Relationship". A detailed description of the "Master-Detail Relationship" is provided, mentioning it creates a specific type of parent-child relationship. Navigation buttons at the top right include "Help for this Page", "Step 1", "Next", and "Cancel".

Step 3: Create the Roll-Up Summary Field

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

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

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

The screenshot shows the Salesforce setup interface for managing objects. The top navigation bar says 'SETUP > OBJECT MANAGER'. Below it, the object name 'department' is selected. On the left, there's a sidebar with various options like Details, Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Fields & Relationships' and shows a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The 'total count' field is listed with a DATA TYPE of 'Roll-Up Summary (COUNT college)'. There are also other standard fields like 'Created By', 'Name', 'Last Modified By', and 'Owner'.

Fields & Relationships					
5 Items, Sorted by Field Label					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	Created By	CreatedById	Lookup(User)		
	department Name	Name	Text(80)		✓
	Last Modified By	LastModifiedById	Lookup(User)		✓
	Owner	OwnerId	Lookup(User,Group)		✓
	total count	total_count_c	Roll-Up Summary (COUNT college)		✓

SETUP

Tabs

Custom Tabs

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

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

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	colleges	Lightning	
Edit Del	departments	Lightning	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

Setup Home Object Manager colle

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.

Previous Save & New Save Cancel

Step 5 of 5

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"/>

Previous Next Cancel

Help for this Page ?

Setup > Object Manager college

New Custom Field

Step 3 of 5

Select Object to Summarize

Master Object: college
Summarized Object: CDDepartments

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: None

Filter Criteria

All records should be included in the calculation.
 Only records meeting certain criteria should be included in the calculation.

Help for this Page

Previous Next Cancel

Setup > Object Manager college

New Custom Field

Step 2 of 5

Enter the details

Field Label: Total count
Field Name: Total_count
Description:
Help Text:

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Help for this Page

Previous Next Cancel

college

New Custom Field

Step 1. Choose the field type

Data Type

- None Selected
- Auto Number
- Formula
- Roll Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- ...

Step 2. Configure Roll Up Summary

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
department Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
total count	total_count_c	Roll-Up Summary (COUNT college)		

Step 4: Create a Lightning App

- 1. Type and select "App Manager."**
- 2. Click "New Lightning App."**
- 3. Fill in basic information (Name, Developer Name, Description).**
- 4. Choose the App Type (Standard, Console, Custom).**
- 5. Customize the Logo and Colour Scheme.**

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

Setup Home Object Manager

Search Setup

User Interface Rename Tabs and Labels Tabs

New Custom Object Tab Step 2 of 3

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

Apply one tab visibility to all profiles [Default On] Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	[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]

Previous Next Cancel

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main content area is titled 'New Custom Object Tab' and is divided into three steps. Step 1, 'Enter the Details', is currently active. It allows users to choose a custom object ('Object' dropdown set to 'college') and a tab style ('Tab Style' dropdown set to 'Jewel'). A note indicates that users can choose a 'Splash Page Custom Link' to show as a splash page when users click on the tab. Step 2, 'Customize the Tab', is visible below. Step 3, 'Add to Custom Apps', is also visible. The top navigation bar includes links for Home, Object Manager, and various system icons.

The screenshot shows the 'Step 3: Add to Custom Apps' page. It lists various standard and custom apps available for adding to the new custom tab. Each app has a checkbox labeled 'Include Tab'. Most checkboxes are checked. A note at the bottom states: 'Append tab to users' existing personal customizations'. The top navigation bar includes links for Home, Object Manager, and various system icons.

Custom App	Include Tab
Platform (standard_Platform)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing (standard_Marketing)	<input checked="" type="checkbox"/>
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	

New Custom Object Tab

Step 1. Enter the Details

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

Object	CDepartment
Tab Style	Lightning

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

Splash Page Custom Link	—None—
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Description

Next Cancel

Lightning Experience App Manager

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

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

SETUP

Tabs

Custom Tabs

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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	colleges	Lightning	
Edit Del	departments	Lightning	

Web Tabs

[New](#) [What Is This?](#)

No Web Tabs have been defined

Visualforce Tabs

[New](#) [What Is This?](#)

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name [i](#)

College Management

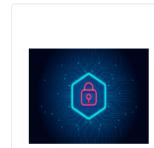
*Developer Name [i](#)

College_Management

Description [i](#)

App Branding

Image [i](#)



Primary Color Hex

▾

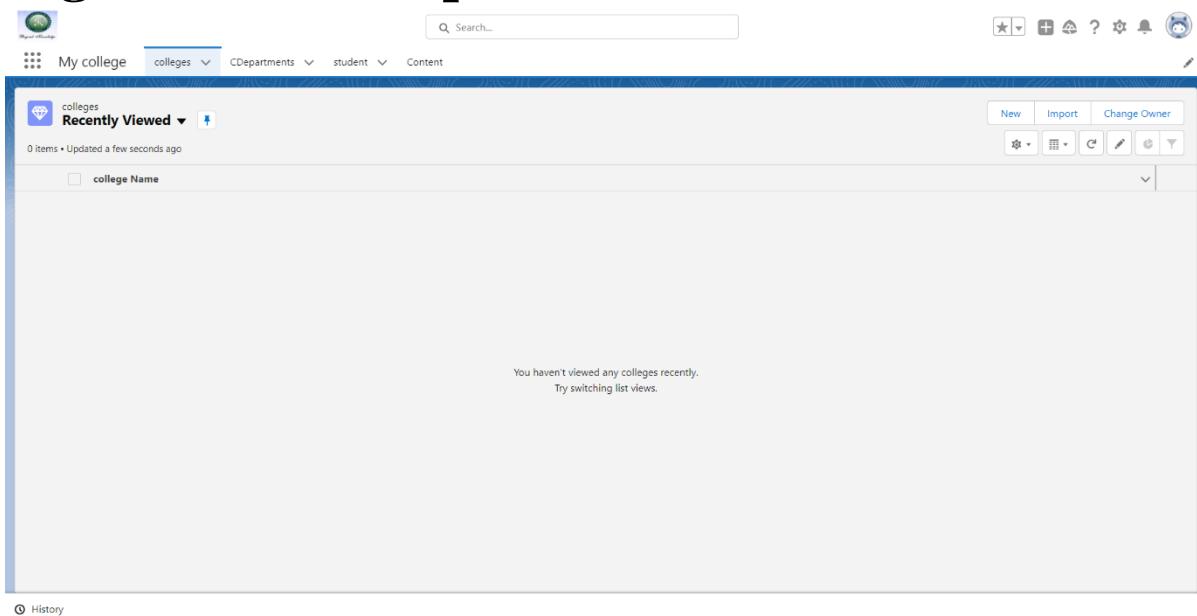
#0070D2

Next

Conclusion:

Now, whenever you create or update a record in the "Department_c" related to a "College_c," the "TotalCount_c" field on the "College_c" will automatically update to show the total number of related records.

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



The screenshot shows a web-based application interface. At the top, there is a navigation bar with icons for user profile, search, and various system functions. Below the navigation bar, the main menu includes 'My college', 'colleges', 'CDepartments' (which is currently selected), 'student', and 'Content'. A 'Recently Viewed' section is displayed, showing a single item: '1 item • Updated a few seconds ago'. This item is a link to 'cse'. The interface features a toolbar with buttons for 'New', 'Import', and other actions. The overall design is clean and modern, typical of a corporate or educational software.

⌚ History

The screenshot shows a software application window titled "College Management". The top navigation bar includes links for "departments" and "colleges". A search bar is located at the top right. The main content area displays a record for "college kiot". The "Details" tab is selected, showing fields for "college Name" (set to "kiot") and "department" (set to "cse"). Below these fields are "Created By" and "Last Modified By" sections, both indicating "SRINATH R, 03/10/2023, 10:10 am". A "New Contact", "Edit", and "New Opportunity" button are visible at the top right of the content area.

The screenshot shows a software application window titled "My college". The top navigation bar includes links for "colleges", "CDepartments", "student", and "Content". A search bar is located at the top right. The main content area displays a list titled "Recently Viewed" under "CDepartments". It shows one item: "1 item • Updated a few seconds ago" followed by a table with one row containing "Department Name" (cse). The table has columns for selection checkboxes, the department name, and a delete icon. A "History" link is located at the bottom left of the content area.

The image displays two screenshots of a college management system interface.

Screenshot 1: Recently Viewed

This screenshot shows a list of recently viewed items under the "Recently Viewed" section. There is one item listed: "college Name kiot". The interface includes a search bar at the top, navigation tabs like "My college", "colleges", "CDepartments", "student", and "Content", and a toolbar with various icons for actions like New, Import, and Change Owner.

Screenshot 2: College Management - college kiot

This screenshot shows a detailed view of a college record for "college kiot". The "Details" tab is selected, displaying the following information:

- college Name: kiot
- department: cse

Below the details, it shows the creation and last modification information:

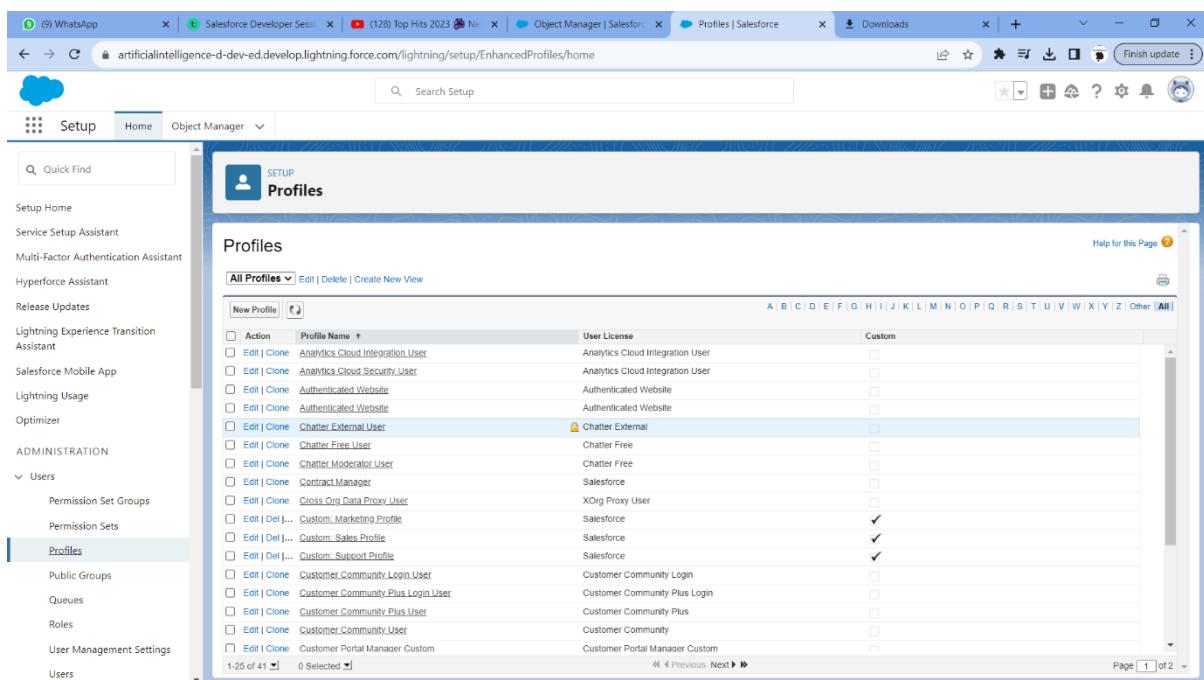
- Created By: SRINATH R., 03/10/2023, 10:10 am
- Last Modified By: SRINATH R., 03/10/2023, 10:10 am

The interface includes a search bar, navigation tabs like "departments", "colleges", and a toolbar with "New Contact", "Edit", and "New Opportunity" buttons.

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main area displays a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains several checked checkboxes, indicating that these profiles are custom profiles. The profiles listed include 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authenticator Website', 'Chatter External User', '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 'User License' column lists various license types such as Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticator Website, Chatter External, Chatter Free, Salesforce, XOrg Proxy User, and Customer Community Login.

The screenshot shows the Salesforce Profiles page and a Clone Profile dialog box.

Profiles Page:

- Header:** SETUP Profiles
- Toolbar:** Help for this Page ?
- Section:** All Profiles
- Buttons:** Edit | Delete | Create New View
- Table Headers:** Action, Profile Name, User License, Custom
- Table Data:**

Action	Profile Name	User License	Custom
Edit Del ...	Manager	Salesforce Platform	<input checked="" type="checkbox"/>
Edit Clone	Marketing_User	Salesforce	<input type="checkbox"/>
Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>

Clone Profile Dialog:

- Header:** SETUP Profiles
- Title:** Clone Profile
- Text:** Enter the name of the new profile.
- Message:** You must select an existing profile to clone from. I = Required Information
- Form Fields:**

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	<input type="text"/>
- Buttons:** Save | Cancel

The screenshot shows two stacked screenshots of the Salesforce Setup interface.

Top Screenshot: The title bar shows multiple open tabs including WhatsApp, Salesforce Developer Session, Top Hits 2023, Object Manager, Profiles, and Downloads. The main window is titled "Profiles" and shows the "Clone Profile" screen. It displays a message: "You must select an existing profile to clone from." Below this, there is a table with columns for Existing Profile, User License, and Profile Name. The "Profile Name" column contains the value "Manager". At the bottom are "Save" and "Cancel" buttons.

Bottom Screenshot: The title bar shows the "Profiles" section. The main window is titled "Profile Manager" and shows the "Profile Detail" screen for the "Manager" profile. The "Name" field is set to "Manager", "User License" is "Salesforce Platform", and "Custom Profile" is checked. The "Created By" field shows "SRINATH R, 03/10/2023, 10:27 am" and the "Modified By" field shows "SRINATH R, 03/10/2023, 10:27 am". Below this, the "Page Layouts" section is visible, showing "Standard Object Layouts" with a "Global" layout and a "Data Use Legal Basis" section.

The screenshot shows the Salesforce Setup Manager interface. The left sidebar is titled 'Setup' and includes sections for Home, Object Manager, Quick Find, and various administrative tools like Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, and Optimizer. The 'Profiles' section is currently selected. The main content area is titled 'Manager' and shows the 'Profile Edit' screen for a profile named 'Manager'. The profile has a 'User License' of 'Salesforce Platform' and a 'Custom Profile' checkbox checked. The 'Custom App Settings' section lists three items: 'Analytics Studio (standard_Insights)', 'App Launcher (standard_AppLauncher)', and 'kiot (kiot)'. The 'Analytics Studio' and 'App Launcher' checkboxes are empty, while the 'kiot (kiot)' checkbox is checked. The 'Service Provider Access' section contains a 'Tab Settings' section with a checkbox for 'Overwrite users' personal tab customizations'. Below it is a 'Standard Tab Settings' section with tabs for 'Home' and 'Default On'. Under 'Home', 'Accounts' is set to 'Default On', 'Alert Settings' is set to 'Default On', and 'Learning' is set to 'Default On'. Under 'Default On', 'Libraries' is set to 'Tab Hidden', and 'Lightning Bolt Solutions' is set to 'Default On'.

The screenshot shows the Salesforce Setup interface for managing Enhanced Profiles. 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, Users, Permission Set Groups, Permission Sets, Profiles (which is selected), Public Groups, Queues, Roles, User Management Settings, and Users.

The main content area displays the 'Profiles' setup screen. It features sections for 'Communication Subscription Channel Types', 'Communication Subscription Consents', 'Communication Subscription Timings', 'Contact Point Addresses', 'Contact Point Consents', 'Contact Point Emails', and 'Custom Object Permissions'. Each section contains a grid of checkboxes for various profile types like Individuals, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, and User External Credentials. Below these are sections for 'Session Settings' (Session Times Out After: 2 hours of inactivity) and 'Password Policies' (User passwords expire in: 90 days, Enforce password history: 3 passwords remembered, Minimum password length: 8).

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads

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

Search Setup

Profiles

Contact Point Addresses, Contact Point Consents, Contact Point Emails, Sellers, Streaming Channels, User External Credentials

Custom Object Permissions

	Bank	customers	Enhancement Requests
	Basic Access	Basic Access	Basic Access
	Read	Create	Read
	Checkmark	Checkmark	Checkmark
	Edit	Delete	Edit
	Checkmark	Checkmark	Checkmark
	Data Administration	Data Administration	Data Administration
	View All	View All	View All
	Modify All	Modify All	Modify All
Contact Point Addresses	Checkmark	Checkmark	Checkmark
Contact Point Consents	Checkmark	Checkmark	Checkmark
Contact Point Emails	Checkmark	Checkmark	Checkmark
Sellers	Checkmark	Checkmark	Checkmark
Streaming Channels	Checkmark	Checkmark	Checkmark
User External Credentials	Checkmark	Checkmark	Checkmark

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 recovery | Require a minimum 1 day password lifetime | Don't immediately expire links in forgot password emails

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads

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

Search Setup

Profiles

Custom Object Permissions

	Bank	customers	Enhancement Requests
	Basic Access	Basic Access	Basic Access
	Read	Create	Read
	Checkmark	Checkmark	Checkmark
	Edit	Delete	Edit
	Checkmark	Checkmark	Checkmark
	Data Administration	Data Administration	Data Administration
	View All	View All	View All
	Modify All	Modify All	Modify All
Contact Point Addresses	Checkmark	Checkmark	Checkmark
Contact Point Consents	Checkmark	Checkmark	Checkmark
Contact Point Emails	Checkmark	Checkmark	Checkmark
Sellers	Checkmark	Checkmark	Checkmark
Streaming Channels	Checkmark	Checkmark	Checkmark
User External Credentials	Checkmark	Checkmark	Checkmark

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 recovery | Require a minimum 1 day password lifetime | Don't immediately expire links in forgot password emails

Screenshot of the Salesforce Developer Session showing the Profiles setup page.

Profiles Setup Page:

- Custom Object Permissions:**

Object	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"/>											
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
- Session Settings:**
 - Session Times Out After: 2 hours of inactivity
 - Session Security Level Required at Login: --None--
- Password Policies:**
 - User passwords expire in: 90 days
 - Enforce password history: 3 passwords remembered
 - Minimum password length: 8
 - 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 Setup Page - All Users:

- Table View:**

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00d5j00000ctfkyc0af.tbp0zg8w3s7e@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	R_SRINATH	SR	2k20cse149@wise-panda-8ez4gw.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5j00000ctfkyc0af.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5j00000ctfkyc0af.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
- Form View:**

General Information

First Name	Sri	Role	<None Specified>
Last Name	R	User License	Salesforce
Alias	sr	Profile	--None--
Email	hisrinathhi@gmail.com	Active	<input checked="" type="checkbox"/>
Username	isrinathhi@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User169630933097598010	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	Default Limit (300)

SETUP
Users

User Sri R

Permission Set Assignments [0] | Permission Set Assignments Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0+] | User Provisioning Accounts [0]

User Detail

Name	Sri R	User License	Salesforce Profile
Alias	sr	Active	<input checked="" type="checkbox"/>
Email	bisrinathhi@gmail.com [Verify] !	Marketing User	<input type="checkbox"/>
Username	isrinathi@gmail.com	Offline User	<input type="checkbox"/>
Nickname	User1696309309759801039 !	Knowledge User	<input type="checkbox"/>
Title		Flow User	<input type="checkbox"/>
Company		Service Cloud User	<input type="checkbox"/>
Department		Site.com Contributor User	<input type="checkbox"/>
Division		Site.com Publisher User	<input type="checkbox"/>
Address			
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)		

TRAILHEAD  Playground Starter  Welcome  Install a Package  Get Your Login Credentials 

To view your password or add a note about it, click the key icon 



WELCOME, SRI

This is your Trailhead Playground, where you can complete hands-on challenges for Trailhead, and try out new Salesforce features and customizations.

Just getting started? Watch this quick video to learn tips for success.



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.

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with navigation links like 'Setup Home', 'Release Updates', 'Lightning Usage', 'ADMINISTRATION' (with sub-links for Users, Data, Email), 'PLATFORM TOOLS' (with sub-links for Apps, Feature Settings, Einstein, Objects and Fields, Process Automation), and a 'College Management' app icon. The main content area features a 'SETUP Home' section with two cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections) and 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app). A right-hand sidebar shows user information ('Sri R'), display density settings ('Comfy'), and options to switch to Salesforce Classic or add a username.

This screenshot shows a specific record in the 'College Management' app. The record details are as follows:

- Related**: College Name - kiot
- Details**:
 - Created By: SRINATH R., 03/10/2023, 10:10 am
 - Last Modified By: SRINATH R., 03/10/2023, 10:10 am

The screenshot shows the 'Profiles' page in the Salesforce Setup. The 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' (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), and 'Object Manager'. The main content displays a table of profiles:

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 C	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"/>

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

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.

Object	Layout	Record Type	Access	
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
Asset	Asset Layout	[View Assignment]	Payment Gateway	Payment Gateway Layout

Profile Detail

Name: salesmanage
User License: Salesforce Platform
Description:
Created By: GOPALS_ 01/10/2023, 7:19 pm
Modified By: GOPALS_ 01/10/2023, 7:19 pm

Page Layouts

Profile HOD

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.

Object	Layout	Record Type	Access	
Global	Global Layout	[View Assignment]	Data Use Legal Basis	Data Use Legal Basis Layout

Profile Detail

Name: HOD
User License: Salesforce Platform
Description:
Created By: SRINATH_R, 03/10/2023, 10:40 am
Modified By: SRINATH_R, 03/10/2023, 10:40 am

Page Layouts

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Profiles | Salesforce | Welcome to Salesforce: Verify... | + | - | X | Finish update

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

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 results

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save | Save & New | Cancel

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify... | + | - | X | Finish update

New User

User Edit

General Information

First Name	<input type="text"/>	Role	<None Specified>
Last Name	<input type="text"/>	User License	Salesforce Integration
Alias	<input type="text"/>	Profile	Salesforce API Only System Integrations
Email	<input type="text"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text"/>	Offline User	<input type="checkbox"/>
Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>
Company	<input type="text"/>	Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Service Cloud User	<input type="checkbox"/>
Division	<input type="text"/>	Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>

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:

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify yo... | +

Finish update

Setup Home Object Manager

Search Setup

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

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

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

User Raj Kumar

User Profile Help for this Page

Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0+] | User Provisioning Accounts [0]

User Detail

Edit Sharing Reset Password Freeze

Name	Raj Kumar	Role	Salesforce Platform
Alias	rkuma	User License	HOD
Email	chatgpt577@gmail.com [Verify]	Profile	Active <input checked="" type="checkbox"/>
Username	kiotcsehod@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User16963098881651229193 [i]	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address		Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)		

TRAILHEAD

Playground Starter

Welcome Install a Package Get Your Login Credentials

Search...

To view your password or add a note about it, click the key icon

WELCOME, RAJ

This is your Trailhead Playground, where you can complete hands-on challenges for Trailhead, and try out new Salesforce features and customizations.

Just getting started? Watch this quick video to learn tips for success.

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.

(9) WhatsApp | Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce V | Reset Password | Salesforce | + | - | X | Finish update

Setup Home Object Manager

Search Setup

Permission Sets

Help for this Page

Permission Sets

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

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/>	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	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Supervisor	Lets users create, read, edit, and delete locations, sublocations, que...	Salesforce
<input type="checkbox"/>	Experience_Profile_Manager	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	Facility_Manager	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Merchandiser	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Agent	Limited access to Order Management features for Self Service	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Operations_Manager		
<input type="checkbox"/>	Order_Management_Shopper		

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 | Page 1 of 2 | 1-25 of 29 | 0 Selected | << Previous Next >>

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

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:

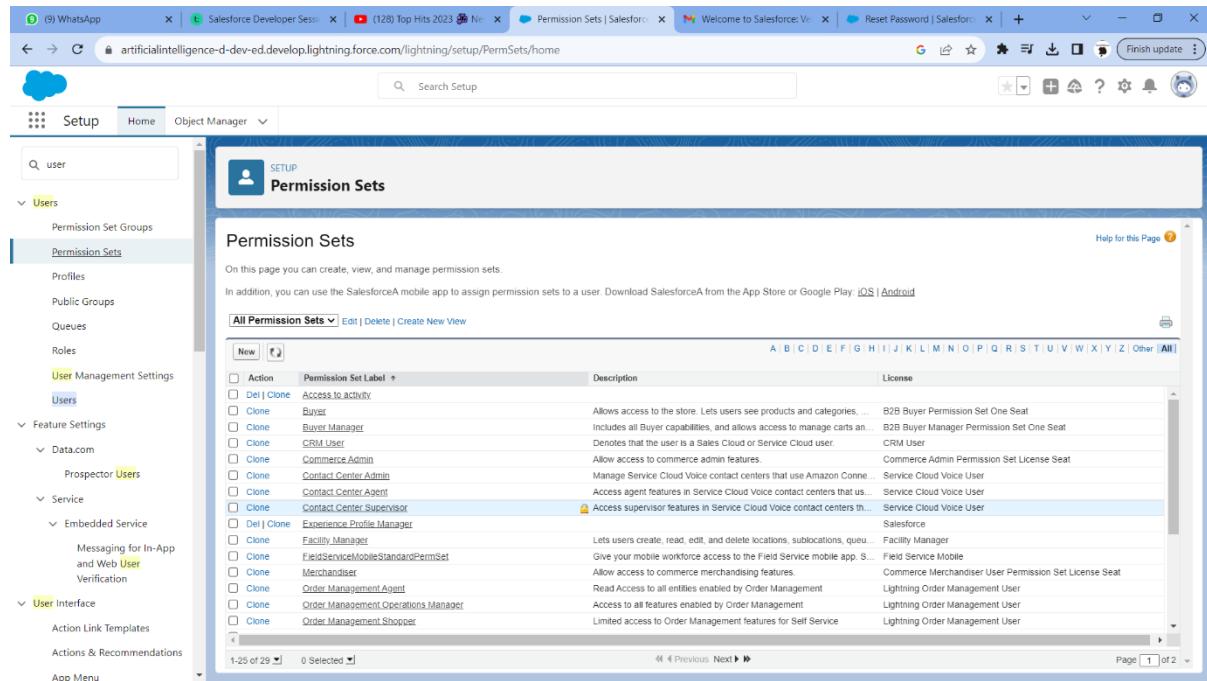
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

Organization-Wide Defaults:

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

Testing:

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



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main content area displays a table of permission sets. The table has columns for Action, Permission Set Label, Description, and License. The 'Permission Set Label' column is sorted in descending order. The 'Description' column contains detailed descriptions of each permission set, such as 'Access to activity', 'Buyer Manager', and 'Facility Manager'. The 'License' column indicates which license is required for each permission set. At the bottom of the table, there are navigation links for '1 of 28' and '0 Selected'.

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"/>	Clone	Buyer	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	CRM User
<input type="checkbox"/>	Clone	CRM User	Commerce Admin
<input type="checkbox"/>	Clone	Commerce Admin	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Contact Center Agent	Commerce 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"/>	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
<input type="checkbox"/>	Clone	Order Management Shopper	Lightning Order Management User

The screenshot shows the 'Permission Sets' section of the Salesforce Setup interface. On the left, the navigation menu is expanded under 'Users', showing 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The 'Permission Sets' item is selected. The main content area displays a 'Create' form for a new permission set. The 'Enter permission set information' section includes fields for 'Label' (empty), 'API Name' (empty), 'Description' (empty), and 'Session Activation Required' (unchecked). Below this, the 'Select the type of users who will use this permission set' section contains a note about license assignment and a dropdown for 'License' set to 'None'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

This screenshot is identical to the one above, but the 'Label' field now contains the value 'salesmanager'. All other fields and the overall layout remain the same.

Permission Sets

new permission

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview

Description	API Name	Namespace Prefix
License: Salesforce Platform	new_permission	
Session Activation Required: <input type="checkbox"/>		
Last Modified By: SRINATH.R, 03/10/2023, 1:54 pm	Created By: SRINATH.R, 03/10/2023, 1:54 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

Search Setup

Permission Sets

salesmanager

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_Invites	--	4	--
Appointment_Schedule_Aggregates	No Access	--	--
Appointment_Schedule_Logs	No Access	--	--
Appointment_Topic_Time_Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset_Action_Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset_State_Periods	No Access	11	--

... > SETUP > PERMISSION SET 'NEW PERMISSION'

Current Assignments

Add Assignment

No assignments defined.

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Select Users to Assign

All Users

6 items • Sorted by Full Name • Filtered by All users • Updated a few seconds ago

Full Name ↑	Al... ↓	Username	R... ↓	A... ↓	Profile
Chatter Expert	Chatter	chatty.00d5j00000ctfkyeaf.tbp0zg8w3s7e@chatter...	✓	Chatter Free User	
Integration User	Integ	integration@00d5j00000ctfkyeaf.com	✓	Analytics Cloud Integration Us...	
Raj Kumar	rkuma	kiotcsehod@gmail.com	✓	HOD	
Security User	sec	insightssecurity@00d5j00000ctfkyeaf.com	✓	Analytics Cloud Security User	

Cancel Next

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OP5j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

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

Cancel Back Assign

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar includes sections like User Management Settings, Feature Settings, and User Interface. The main content area displays a success message: "1 assignments were successful." under the heading "salesmanager". A table titled "Assignment Summary" lists one assignment: "madhu b" with "Salesforce Platform" license and "Success" status. At the bottom right of the main window is a "Done" button.

Assignment Summary

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

Done

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes tabs for "customers", "Bank", and "customers". The main content area displays a "Recently Viewed" list titled "customers". It shows a single item: "0 items • Updated a few seconds ago". Below the list, a message says "You haven't viewed any customers recently. Try switching list views." To the right of the list is a "LIST VIEW CONTROLS" sidebar with options: New, Clone, Rename, Sharing Settings, Show List Filters, Select Fields to Display, and Delete. At the bottom of the page is a footer bar with the text "javascript:void(0)".

Recently Viewed

customers

0 items • Updated a few seconds ago

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)

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

Solution:

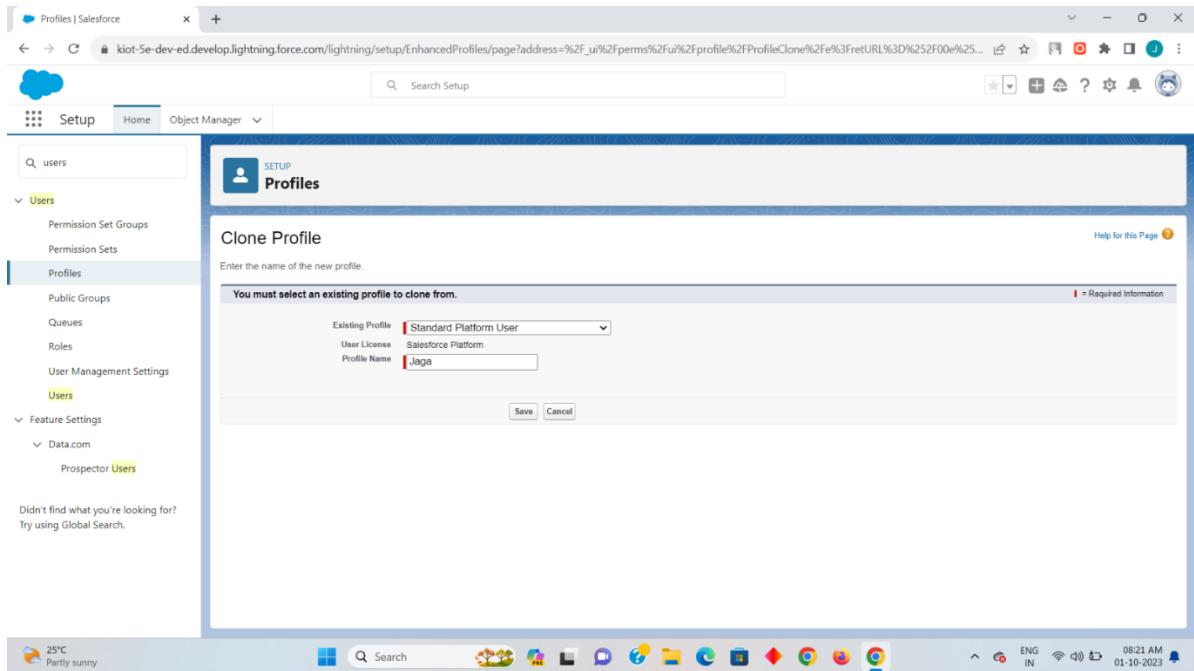
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar includes sections for Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. Under Profiles, there is a sub-section for Users. A search bar at the top right contains the text 'Search Setup'. The main content area is titled 'Profiles' and displays a table of existing profiles. The columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists profiles such as 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External', 'Chatter Free', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom - Marketing Profile', 'Custom - Sales Profile', 'Customer Community Login User', 'Customer Community Plus Login', and 'Customer Community Plus User'. The 'User License' column shows various options like 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External', etc. The 'Custom' column indicates which profiles are custom-built, with several checked off. At the bottom of the table, it says '1-25 of 41' and '0 Selected'. The status bar at the bottom of the browser window shows the date '01-10-2023' and time '08:20 AM'.

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.

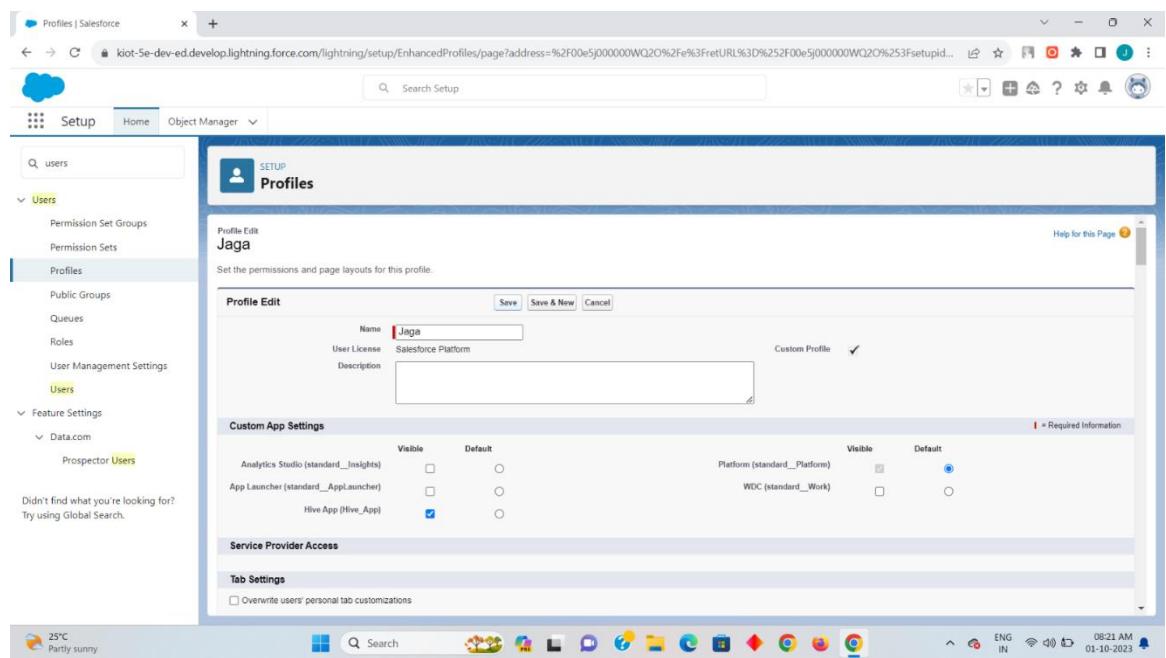
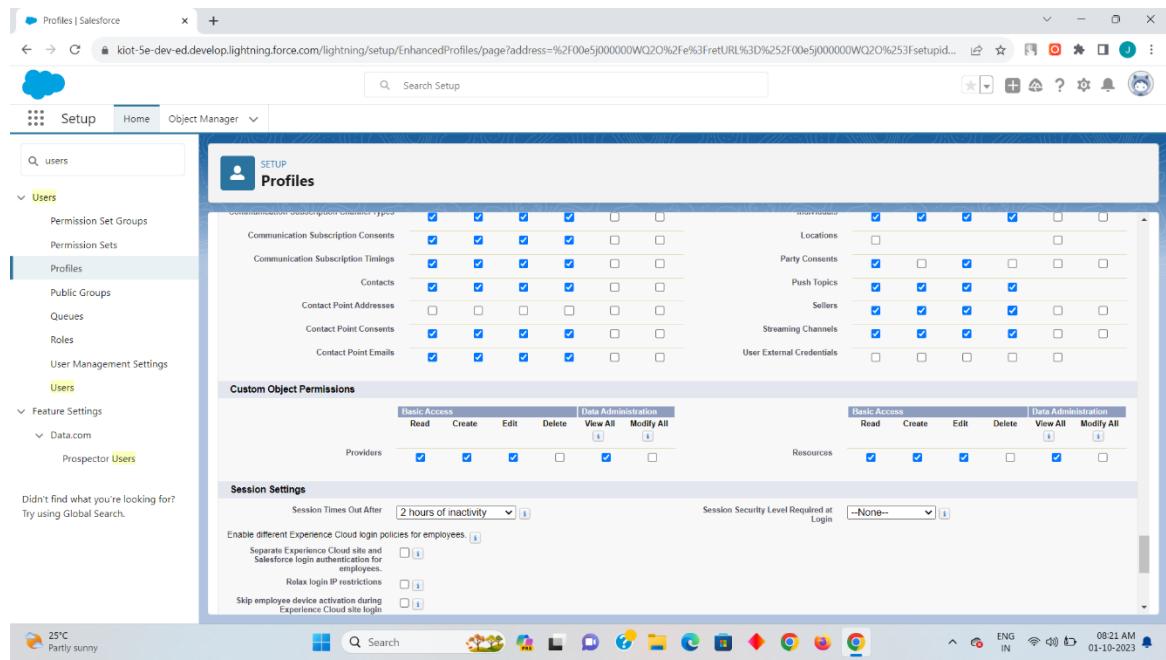
The image contains two screenshots of the Salesforce Setup interface, illustrating the steps to manage user profiles and object permissions.

Screenshot 1: Profile Edit Screen

This screenshot shows the "Profiles" section of the Setup menu. A specific profile named "Jaga" is selected. The "Profile Detail" section displays basic information: Name (Jaga), User License (Salesforce Platform), Description (None), Created By (Jagadeesh S.), and Modified By (Jagadeesh S.). The "Page Layouts" section lists standard object layouts for various objects like Account, Contact, and Lead, each with a "View Assignment" link. The "Custom Profile" checkbox is checked.

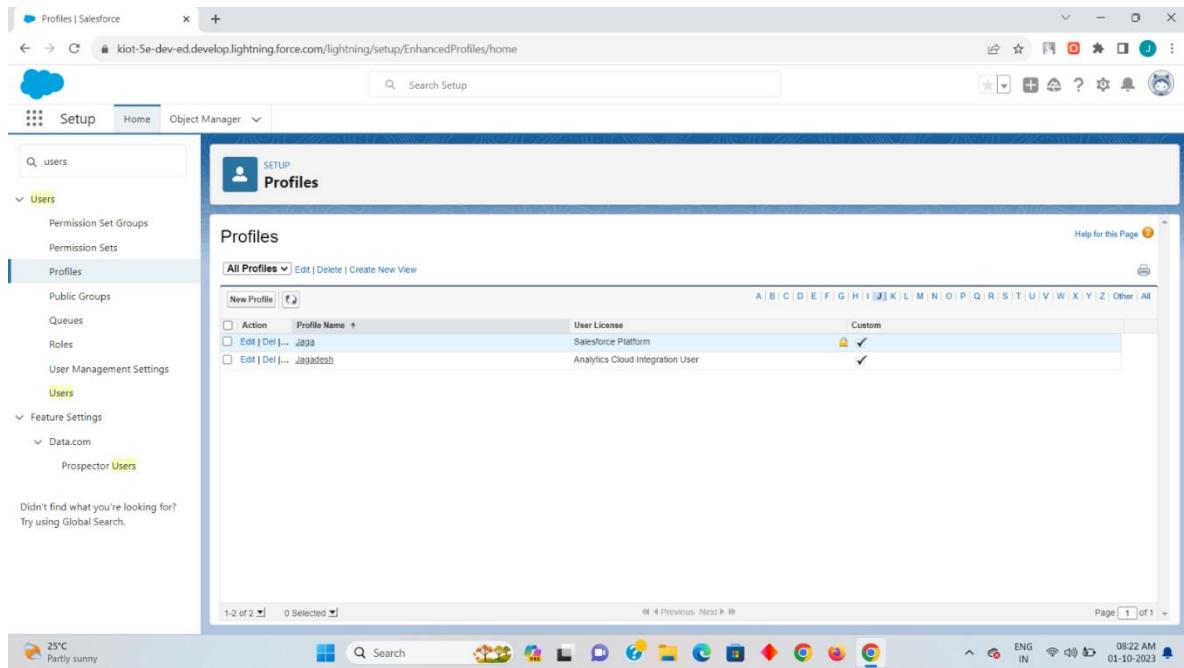
Screenshot 2: Custom Object Permissions Screen

This screenshot shows the "Custom Object Permissions" section under the "Profiles" tab. It displays a grid of checkboxes for enabling permissions on various objects. The columns represent different permission types (Basic Access, Data Administration) and objects (Communication Subscription Consents, Communication Subscription Timings, Contacts, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, User External Credentials). Below this, there are sections for "Custom Object Permissions" and "Session Settings".



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, showing options like Setup, Home, Object Manager, and a search bar. The main content area is titled 'Profiles' and displays a table of profiles. The table includes columns for Action, Profile Name, User License, and Custom. A new profile named 'Jaga' is listed under the 'User License' column, which is set to 'Salesforce Platform'. The 'Custom' column for this profile has a checked checkbox. The table header includes links for All Profiles, Edit, Delete, and Create New View. Below the table, there's a navigation bar with links for A through Z and Other, and a page number indicator showing 1 of 1.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Jaga	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Jagadeesh	Analytics Cloud Integration User	<input checked="" type="checkbox"/>

Step 5:

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

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar is titled 'Users' and includes sections for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. Under 'User Management Settings', 'Users' is selected. The main content area is titled 'SETUP Users' and shows a table of 'All Users'. The table columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Chatter_Expert', 'Grey_Jane', 'S.Jaga', 'S.Jagadesh', 'User_Integration', and 'User_Security'. Each user row has a checkbox for 'Action', a link to 'Edit', and a link to 'Reset Password(s)'. The 'Role' column indicates their current role, and the 'Active' column shows a checked box for most users. The 'Profile' column lists the profiles assigned to each user. At the bottom of the table, there are links for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 08:22 AM on 01-10-2023.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty.00d500000c8joseaf.6zlbkrirk4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Grey_Jane	Grey	jane_gray.fygnimmoalm.c27d2ksgoth@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	S.Jaga	JS	jaga98@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S.Jagadesh	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S.Jagadesh	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	Integ	integration@00d500000c8joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d500000c8joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Setup - Users

New User

User Edit

General Information

First Name	Jagadesh11
Last Name	S
Alias	jS
Email	jwv123@gmail.com
Username	jwv123@gmail.com
Nickname	User169612875144962592
Title	
Company	
Department	
Division	

Role: Director, Channel Sales
User License: Salesforce Platform
Profile: Standard Platform User
Active: Jaga
Marketing User: Standard Platform User

Office 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): None, High-Contrast Palette on Charts: None

Save | Save & New | Cancel | Help for this Page

Salesforce Setup - Users

New User

User Edit

General Information

First Name	Jagadesh22
Last Name	S
Alias	jS
Email	jwv1@gmail.com
Username	jwv1@gmail.com
Nickname	User169612879983618745
Title	
Company	
Department	
Division	

Role: Marketing Team
User License: Salesforce Platform
Profile: Standard Platform User
Active: Jaga
Marketing User: Standard Platform User

Office 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): None, High-Contrast Palette on Charts: None

Save | Save & New | Cancel | Help for this Page

Salesforce Setup - Users

All Users

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

In addition, download Salesforce to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit S.Jagadesh	jS	jwv10@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit S.Jagadesh22	jS	jwv1@gmail.com	SE Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit S.Jagadesh	jS	jwv117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	Edit S.Jagadesh11	jS	jwv123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	Edit S.Jagadesh22	jS	jwv10@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Standard Platform User

New User | Reset Password(s) | Add Multiple Users | 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

Save | Save & New | Cancel | Help for this Page

Now you can preview your two user that you have created in my side I had create the two users a as a director channel sales with the College Management

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.

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Permission Sets

Buyer

Buyer Manager

CRM User

Commerce Admin

Contact Center Admin

Contact Center Agent

Contact Center Supervisor

Experience Profile Manager

Facility Manager

Field Service Manager

Merchandise

Order Management Agent

Order Management Operations Manager

Buyer

Buyer Manager

CRM User

Commerce Admin

Contact Center Admin

Contact Center Agent

Contact Center Supervisor

Experience Profile Manager

Facility Manager

Field Service Manager

Merchandise

Order Management Agent

Order Management Operations Manager

B2B Buyer Permission Set One Seat

B2B Buyer Manager Permission Set One Seat

CRM User

Commerce Admin Permission Set License Seat

Service Cloud Voice User

Service Cloud Voice User

Service Cloud Voice User

Salesforce

Field Service Mobile

Commerce Merchandise User Permission Set License Seat

Lightning Order Management User

Lightning Order Management User

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

New

Help for this Page

1-25 of 30 0 Selected

Page 1 of 2

https://kiot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/home

25°C Partly sunny

Q Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Permission Set Create

Label: permission12

API Name: permission12

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License: -None-

Save Cancel

https://kiot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/page?address=%2FPermissionSet%2FnewPermissionSet.apexp

25°C Partly sunny

Q Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5j000008Pgt%3FsfdclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

08:24 AM 01-10-2023

Permission Sets

permission12

Find Settings | Clone | Delete | Edit Properties | Manage Assignments

API Name: permission12
Namespace Prefix:
Created By: Jagadeesh S. 01/10/2023, 8:24 am

Session Activation Required:

Last Modified By: Jagadeesh S. 01/10/2023, 8:24 am

Apps

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

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

Object Settings
Permissions to access objects, 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

Permission Sets | Salesforce

https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5j000008Pgt%3DsfdlentityPermissions

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

08:25 AM 01-10-2023

Permission Sets

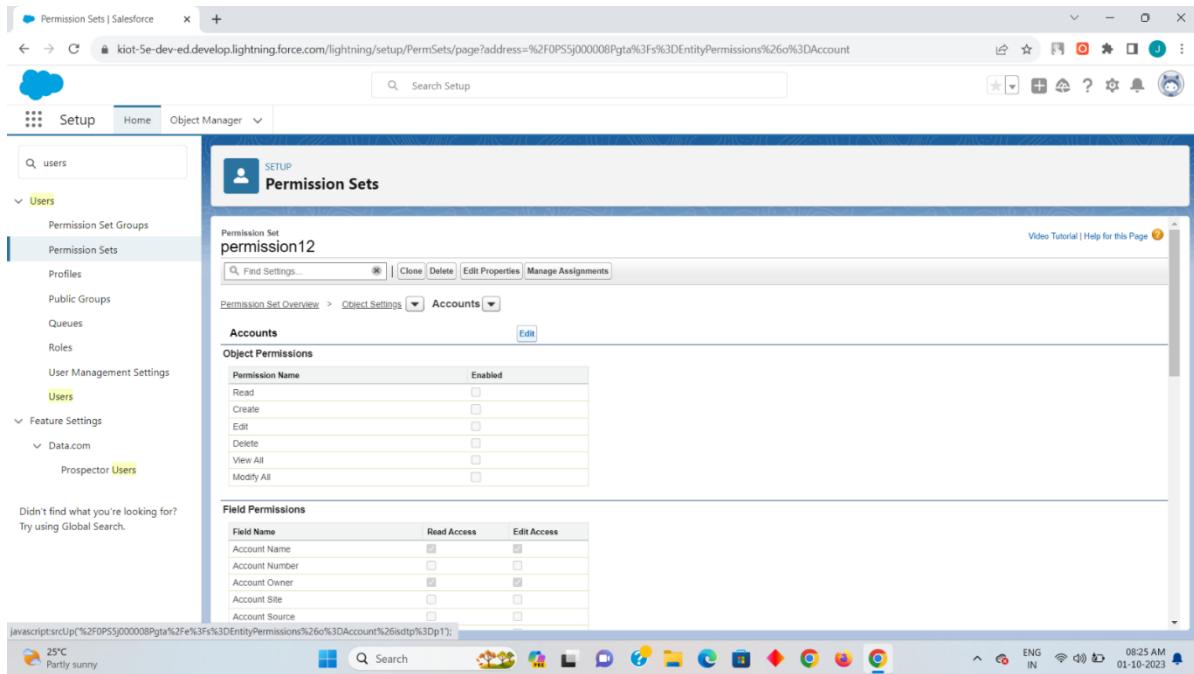
permission12

Find Settings | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	9	--
Accounts	No Access	44	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Activity Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assessments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invites	--	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	--



Step 7:

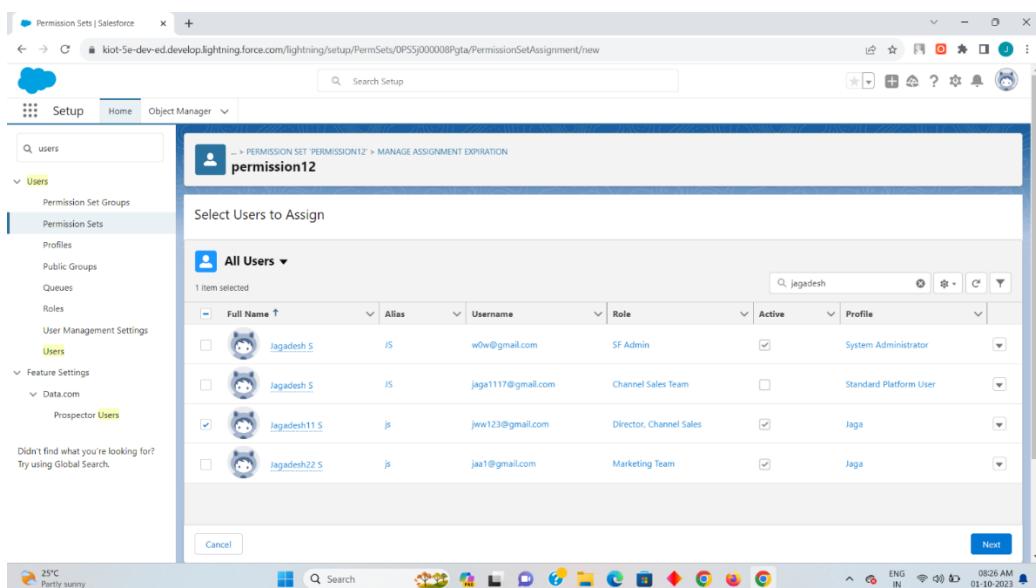
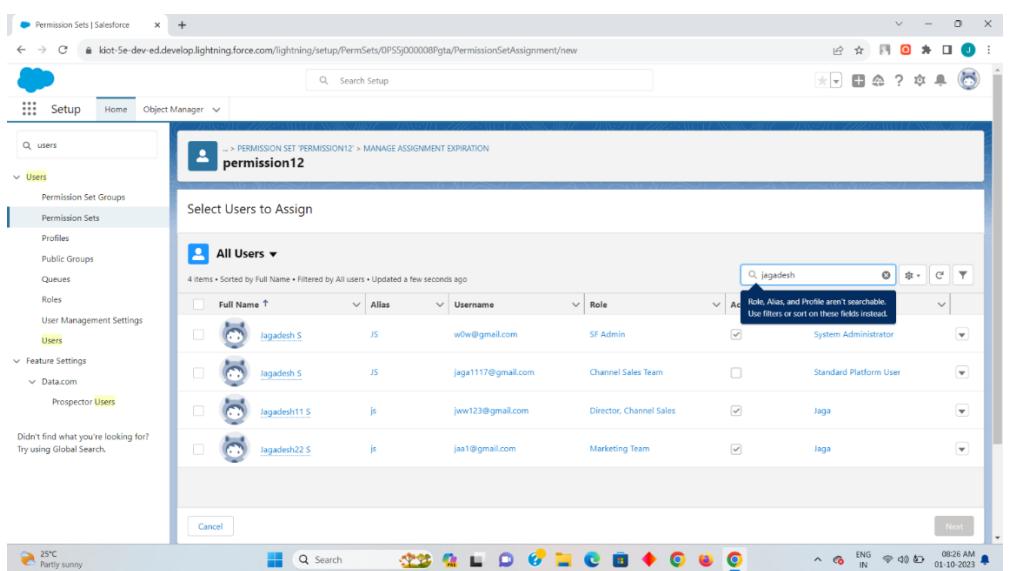
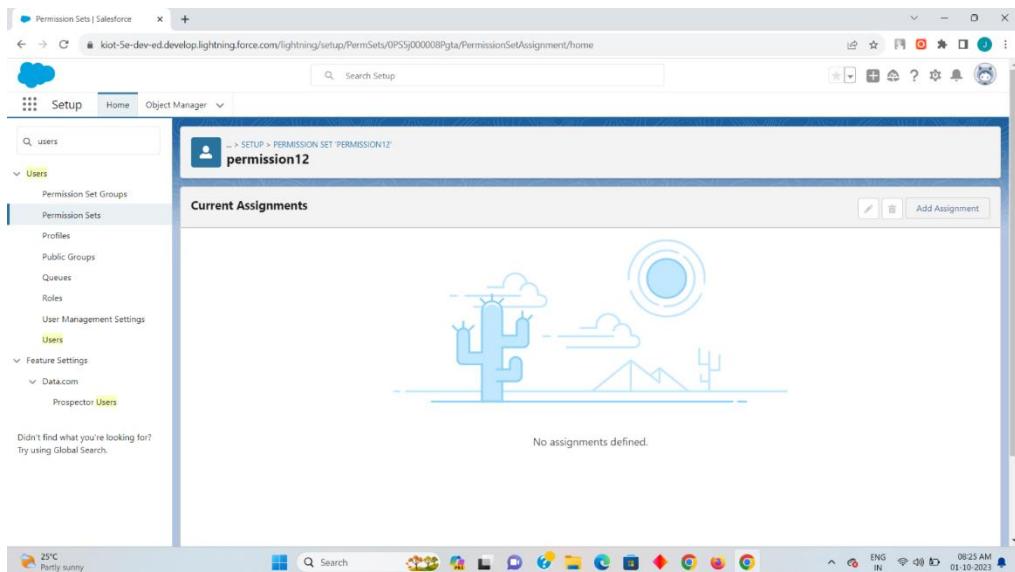
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

The screenshots illustrate the configuration of a Permission Set in Salesforce:

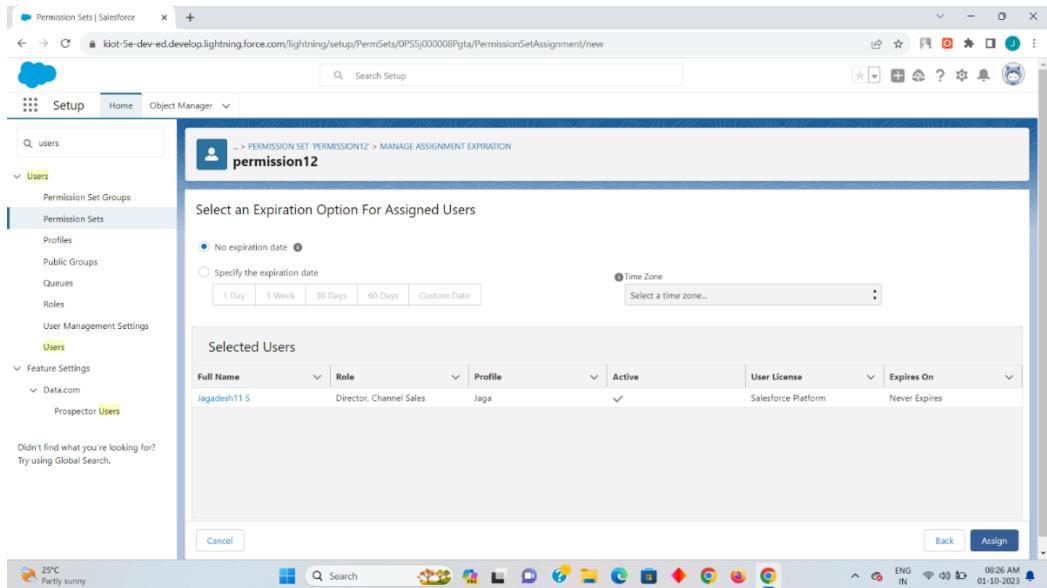
- Screenshot 1:** Shows the 'Object Permissions' section for the 'Accounts' object. The 'Delete' permission is currently unchecked.
- Screenshot 2:** Shows the 'Object Permissions' section for the 'Accounts' object. The 'Delete' permission is now checked.
- Screenshot 3:** Shows the 'Save' button being clicked to apply the changes.

Step 8

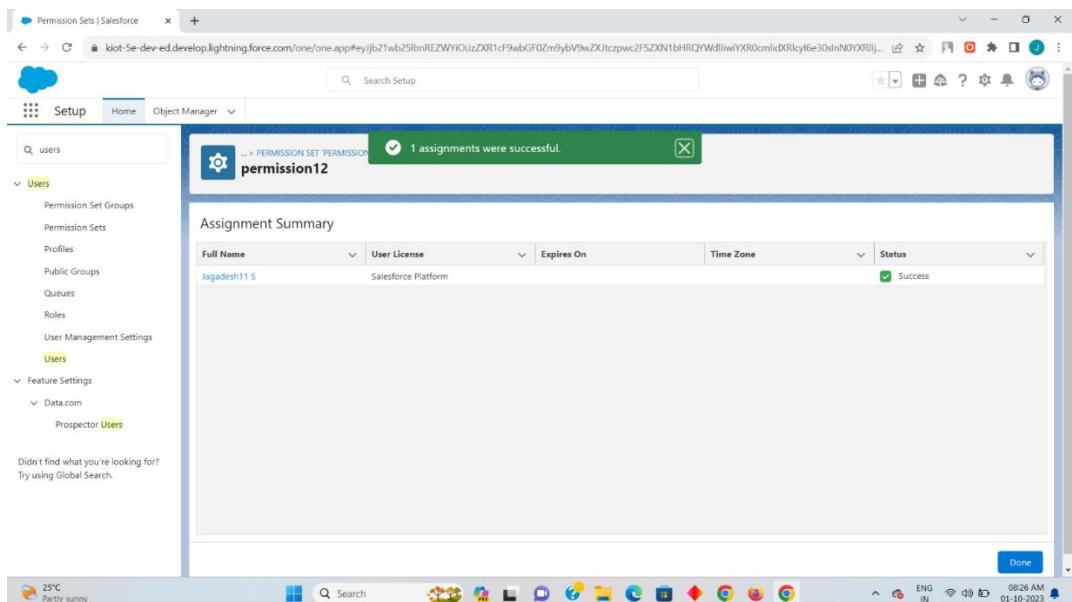
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



Now the specific access for the Jagadeth11 user has been assigned successfully.

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

Solution:

Step 1: Create a Custom Object

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

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

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

The screenshot shows the 'Email Template' page in Salesforce. At the top, there's a header with the template name 'Thank You Email - Survey'. To the right are buttons for 'Edit in Builder', 'Edit', 'Clone', and a dropdown menu. Below the header, there are two tabs: 'Details' (which is selected) and 'Related'. Under the 'Information' section, there are fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Description' (empty), 'Related Entity Type' (set to 'Survey Result'), 'Folder' (empty), and 'Public Email Templates' (empty). A checkbox labeled 'Made in Email Template Builder' is checked. In the 'Message Content' section, there are fields for 'Subject' (set to 'Thank You For Completing Our Survey!') and 'Enhanced Letterhead' (empty). The 'HTML Value' field contains the following content:

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

Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.
3. Select **Email Alerts**, click on the **New Email Alert** button.
4. Name the **Email Alert** and click the Tab button. The **Unique Name** will populate.
5. For **Object** select **Survey Result**.

6. For the Email Template chooses Lightning Email Template Thank You Email – Survey.
7. For Recipient Type select Email Field: Email.
8. Click Save.

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

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for: Find

Recipients

Available Recipients	Selected Recipients
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email
Add <input type="button" value=">"/>	Remove <input type="button" value="<"/>

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

Additional Emails:

From Email Address: Current User's email address

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

Save | Save & New | Cancel

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

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

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

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

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

2.Click Add Row

3.Row 2:

1.Field: Email__c

2.Value: {!Email.value}

4.Click Add Row

5.Row 3:

1.Field: Name__c

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

6.Click Add Row

7.Row 3:

1.Field: Rating__c

2.Value: {!Rating}

7.Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

* Label: Save Response * API Name: Save_Response

Description:

How Many Records to Create:
 One
 Multiple

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

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

Set Field Values for the Survey Result

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

[Cancel](#) [Done](#)

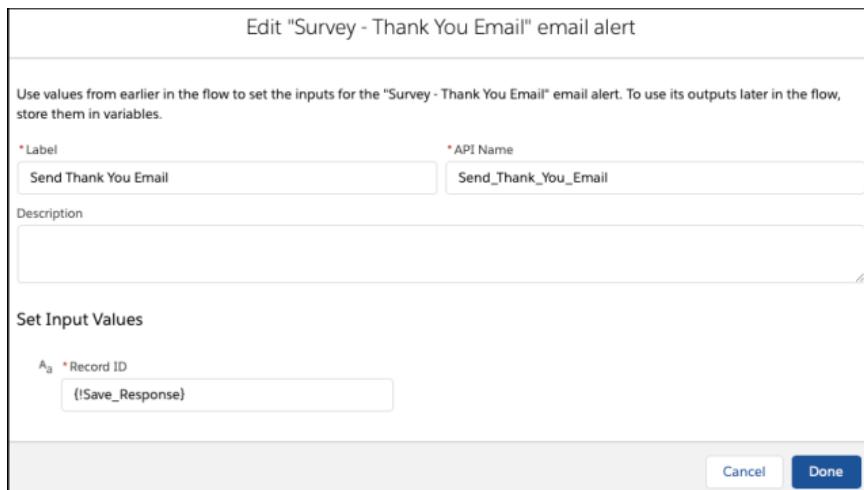
Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

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

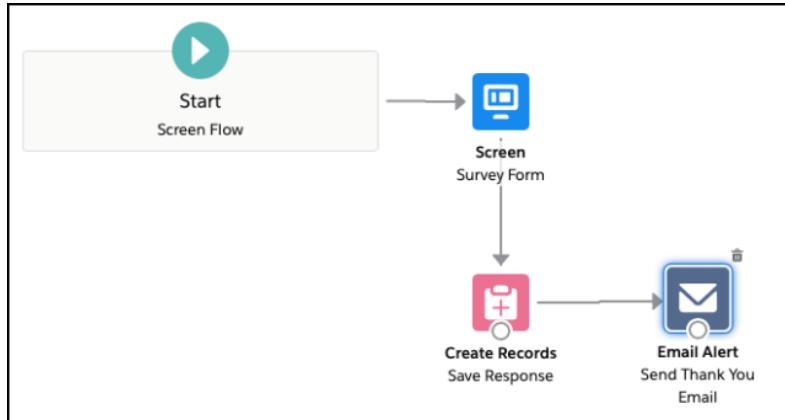
- 1.Under **Toolbox**, select **Element**.
- 2.Drag-and-drop **Action** element onto the Flow designer.
- 3.In the **Action** box, type **Survey – Thank You Email**.

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

5.Click Done.



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

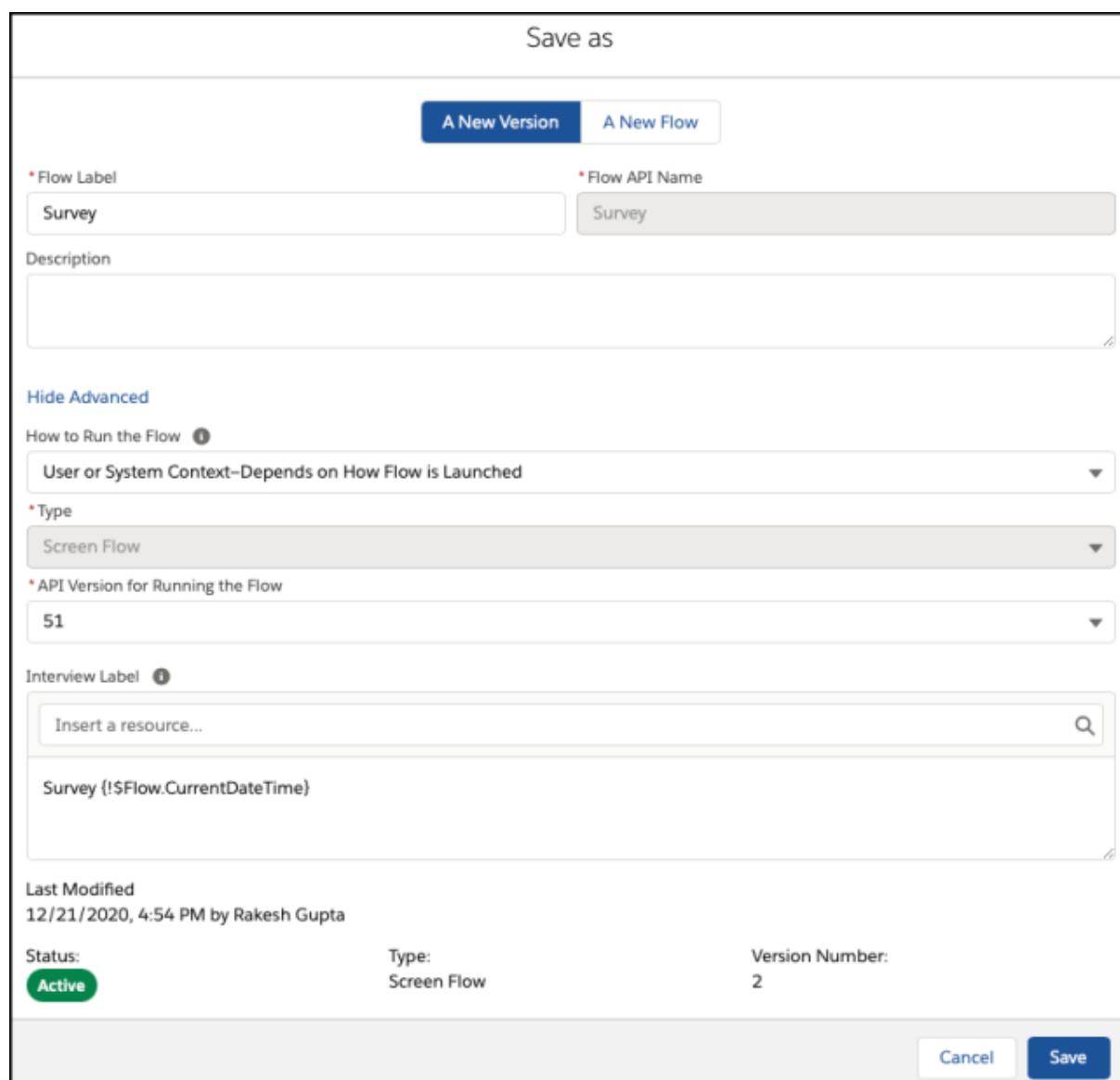
Insert a resource... 🔍

Survey {!\$Flow.CurrentDateTime}

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

Status: Active Type: Screen Flow Version Number: 2

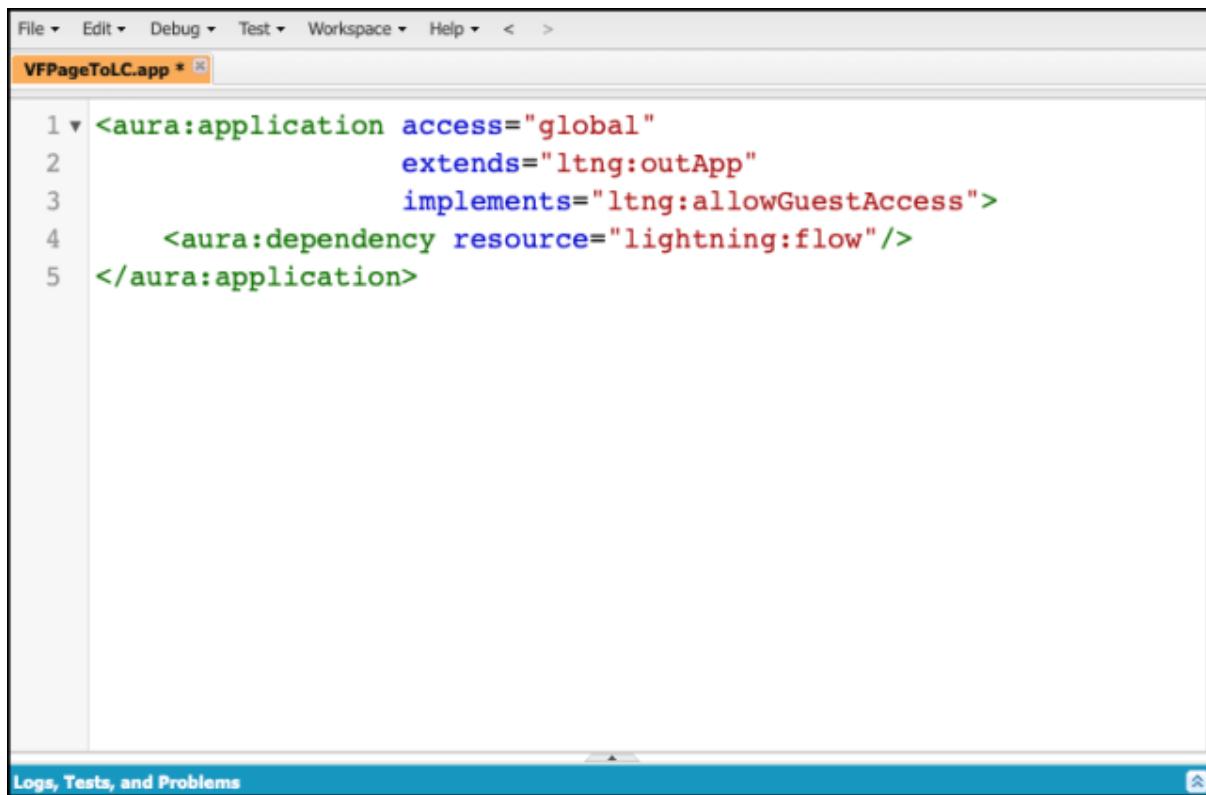
Cancel Save



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 (VFPPageToLC)** 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 following details:

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

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

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

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

Add the Lightning Components for Visualforce JavaScript library to your Visualforce page using the **<apex:includeLightning/>** component. In the Visualforce page, reference the dependency app. Then write a JavaScript 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 Survey' setup screen. The 'Page Information' section includes fields for Label ('Survey'), Name ('Survey'), Description, and checkboxes for 'Available for Lightning Experience, Experience Builder sites, and the mobile app' (checked) and 'Require CSRF protection on GET requests' (unchecked). Below this is the 'Visualforce Markup' tab, which contains 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="slds-scope">
<div id="flowContainer" />
<script>
var statusChange = function (event) {
    if(event.getParam("status") === "FINISHED") {
        var outputVariables = event.getParam("outputVariables");
        var key;
        for(key in outputVariables) {
            if(outputVariables[key].name === "myOutput") {
                ...
            }
        }
    }
};
$Lightning.use("c:VFFPageToLC", 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 e
Default Record Owner	Rakesh Gupta	i e
Default Web Address	http://kathiarch-developer-edition.gus.force.com/survey	
Active	<input checked="" type="checkbox"/>	i
Active Site Home Page	Survey	i [Preview]
Inactive Site Home Page	InMaintenance	i [Preview]
Site Template	SiteTemplate	i e
Site Robots.txt	 	
Site Favorite Icon	 	
Analytics Tracking Code	 	
URL Rewriter Class	 	
Enable Feeds	 	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	
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:

Survey

Name

First Name
Alok

Last Name
Sinfal

*Email
[REDACTED]

*Rating
5

*Comment
Awesome Blog 

Next

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

Thank You For Completing Our Survey!  [Inbox](#)  

 **Survey Site Guest User** via [bj9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com](#)
to me 

8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,
Automation Champion