

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 'New Custom Object' page in the Salesforce Setup interface. The page title is 'New Custom Object'. At the top, there is a message: '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](#)'. Below this, the 'Custom Object Definition Edit' section contains fields for 'Label' (college) and 'Plural Label' (colleges), both with examples of 'Account'. There is also a checkbox for 'Starts with vowel sound'. The 'Object Name' field is set to 'college' with an example of 'Account'. A 'Description' text area is present. Under 'Context-Sensitive Help Setting', the option 'Open the standard Salesforce.com Help & Training window' is selected. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section includes a note about record names appearing in various contexts like layouts and search results. It shows 'Record Name' as 'College Name' with an example of 'Account Name', and 'Data Type' as 'Text'. The 'Optional Features' section has several checkboxes: 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Object Classification' section has checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section shows 'In Development' is selected. The 'Search Status' section has a checkbox for 'Allow Search'. The 'Object Creation Options' section has checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

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

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

- Header:** Search bar with "Search Setup" and various navigation icons.
- Left Sidebar:** "Setup" button, "Home" link, and "Object Manager" dropdown.
- Page Title:** "Object Manager" with a "SETUP" icon.
- Section:** "New Custom Object"
- 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." with "Tell me more!" and "Don't show this message again" links.
- Form Fields (Custom Object Definition Edit):**
 - Custom Object Information:**
 - Label: "department" (Example: Account)
 - Plural Label: "departments" (Example: Accounts)
 - Starts with vowel sound:
 - The Object Name is used when referencing the object via the API:
 - Object Name: "department" (Example: Account)
 - Description: A large text area.
 - Context-Sensitive Help Setting:
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
 - Content Name:
- Section:** "Enter Record Name Label and Format"

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	Department Name	Example: Account Name
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 - Data Type:
- Section:** "Optional Features"
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing (i)
- Section:** "Object Classification"

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

 - Allow Sharing
 - Allow Bulk API Access
 - Allow Streaming API Access
- Section:** "Deployment Status"

[What is this?](#)

 - In Development
 - Deployed
- Section:** "Search Status"

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

 - Allow Search
- Section:** "Object Creation Options (Available only when custom object is first created)"
 - Add Notes and Attachments related list to default page layout
 - Launch New Custom Tab Wizard after saving this custom object

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.

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

Object Manager: CDepartment

Details

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

Buttons: Edit, Delete

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

Object Manager: CDepartment

Fields & Relationships

New Relationship

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

Help for this Page

Step 3 of 6

Previous Next Cancel

Fields & Relationships

Page Layouts	Field Label: college
Lightning Record Pages	Field Name: college
Buttons, Links, and Actions	Description:
Compact Layouts	Help Text:
Field Sets	
Object Limits	
Record Types	
Related Lockup Filters	
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	

Sharing Settings

Child Relationship Name: CDepartments

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:

Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: Child records can be reparented to other parent records after they are created

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

Lookup Filter

The image contains two screenshots of the Salesforce Setup interface, both titled "CDepartment".

Screenshot 1: New Relationship

- Left Panel:** Shows the "Fields & Relationships" section under "New Relationship".
- Right Panel:** Step 2 of 6, "Choose the related object". It shows a dropdown menu set to "college".

Screenshot 2: New Custom Field

- Left Panel:** Shows the "Fields & Relationships" section under "New Custom Field".
- Right Panel:** Step 1 of 6, "Choose the field type". The "Data Type" section is expanded, showing options like "None Selected", "Auto Number", "Formula", "Roll Up Summary", "Lookup Relationship", "Master-Detail Relationship" (which is selected), and "External Lookup Relationship". A detailed description of "Master-Detail Relationship" is visible.

Step 3: Create the Roll-Up Summary Field

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

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

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

Setup > OBJECT MANAGER CDepartment

Fields & Relationships

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

Setup > User Interface > 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	Book1	Box	
Edit Del	Research Proposal	Square	
Edit Del	student	Box	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

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.

Step 5 of 6

Previous Save & New Save Cancel

Setup | Home | Object Manager

college New Custom Field

Step 4. Establish field-level security Step 4 of 5

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 - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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.

Setup | Home | Object Manager

college New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object	college
Summarized Object	<input type="text" value="CDepartments"/>

Select Roll-Up Type

COUNT SUM MIN MAX

Field to Aggregate:

Filter Criteria

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

Setup | Home | Object Manager

college New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label	<input type="text" value="Total count"/>
Field Name	<input type="text" value="Total_count"/>
Description	<input type="text"/>
Help Text	<input type="text"/>

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

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being created is 'college'. The 'Fields & Relationships' tab is selected. The 'Data Type' section is open, showing various options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll Up Summary' (selected), 'Lookup Relationship', 'Master-Detail Relationship', and 'External Lookup Relationship'. A note indicates that 'Roll Up Summary' creates a relationship that links the object to another object, allowing users to click on a lookup icon to select a value from a popup list. The 'Master-Detail Relationship' note specifies it creates a special type of parent-child relationship where ownership and sharing are determined by the master record. The 'External Lookup Relationship' note specifies it creates a relationship to an external object whose data is stored outside the Salesforce org.

The screenshot shows the Salesforce Setup interface displaying the list of fields for the 'college' object. The 'Fields & Relationships' tab is selected. The table lists four fields: 'college Name' (Field Label: college Name, Field Name: Name, Data Type: Text(80), Controlling Field: none, Indexed: checked), 'Created By' (Field Label: Created By, Field Name: CreatedById, Data Type: Lookup(User), Controlling Field: none, Indexed: checked), 'Last Modified By' (Field Label: Last Modified By, Field Name: LastModifiedById, Data Type: Lookup(User), Controlling Field: none, Indexed: checked), and 'Owner' (Field Label: Owner, Field Name: OwnerId, Data Type: Lookup(User/Group), Controlling Field: none, Indexed: checked).

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

Step 4: Create a Lightning App

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

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

Setup Tabs

New Custom Object Tab

Step 2. Add to Profiles Step 2 of 3

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

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

Profile	Tab Visibility
Analytics Cloud Integration User	[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

Setup Home Object Manager

Search Setup

User Interface

Rename Tabs and Labels

Tabs

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

Setup Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

Select an existing custom object or create a new custom object now.

Object: college Tab Style: Jewel

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab. Splash Page Custom Link: -None-

Enter a short description.

Description:

Next Cancel

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. On the left, a sidebar lists 'User Interface' sections: 'Rename Tabs and Labels' (selected), 'Tabs', and 'Customize Home Page'. A note says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Step 3. Add to Custom Apps' and 'Step 3 of 3'. It displays a list of 'Custom App' names with a 'Include Tab' checkbox next to each. Most checkboxes are checked. A note at the bottom says 'Append tab to users' existing personal customizations'. At the bottom right are 'Previous', 'Save', and 'Cancel' buttons.

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"/>

App Name ↑	Developer Name	Description	Last Modified Date	App ...	Visiblity
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 Console	LightningSalesConsole	Manage your sales process with accounts, leads, opportunities, and more (Lightning Experience) Lets sales reps work with multiple records on one screen	14/07/2023, 10:47 am	Lightning	✓
15 Sales Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	14/07/2023, 10:47 am	Lightning	✓
16 Salesforce Chatter			14/07/2023, 10:47 am	Classic	✓

Custom Tabs

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

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

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

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

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 Branding
* App Name <small>(Required)</small> My college	Image <small>(Required)</small>
* Developer Name <small>(Required)</small> My_college	Primary Color Hex Value #217AC7
Description <small>(Optional)</small> Enter a description...	Org Theme Options <input checked="" type="checkbox"/> Use the app's image and color instead of the org's custom theme

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.

Recently Viewed

0 items • Updated a few seconds ago

college Name

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

History

New college

* = Required Information

Information

college Name
kiot

phone
9087116402

Email
kiot@ac.in

Location
Latitude
90
Longitude
80

Owner
krishna s

Cancel Save & New Save

My college colleges CDdepartments student Content

CDepartments Recently Viewed

1 item • Updated a few seconds ago

Department Name

cse

History

app-d-dev-ed.develop.lightning.force.com/lightning/o/CDepartment__c/new?count=3&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169...

Finish update

My college colleges CDdepartments

New CDepartment

Information

* = Required Information

Department Name: information technology

college: kilot

email: it@gmail.com

phone: 897577568

hod name: arul

about:

Cancel Save & New Save

History

My college colleges CDdepartments student Content

Search... ★ + ? ⚡ 🔍

CDepartment information technology

New Contact Edit New Opportunity

Related Details

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

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

History

My college colleges CDdepartments student Content

Search... ★ + ? ⚡ 🔍

college kiot

New Contact Edit New Opportunity

Related Details

college Name: kiot Owner: krishna s.
Total count: 1
phone: 9087116402
Email: kiot@gmail.com
Location: 90, 80

Created By: krishna s. 01/10/2023, 11:16 am Last Modified By: krishna s. 01/10/2023, 11:17 am

History

My college colleges CDdepartments student Content

Search... ★ + ? ⚡ 🔍

CDepartments Recently Viewed

1 item • Updated a few seconds ago

Department Name
cse

New Import

History

Recently Viewed

1 item • Updated a few seconds ago

college Name
kiot

History

Details

Related

college Name
kiot

Owner
krishna.s

Total count
2

phone
9087116402

Email
kiot@gmail.com

Location
90, 80

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

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

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

Solution:

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

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

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

Profiles

All Profiles Edit | Delete | Create New View

New Profile

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

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

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

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

Profiles

All Profiles Edit | Delete | Create New View

New Profile

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

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

1-7 of 7 0 Selected Page 1 of 1

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main page title is 'Clone Profile'. A message at the top states: 'You must select an existing profile to clone from.' Below this, there are three fields: 'Existing Profile' (set to 'Standard Platform User'), 'User License' (set to 'Salesforce Platform'), and 'Profile Name' (which is empty). At the bottom right of the form are 'Save' and 'Cancel' buttons.

This screenshot is identical to the one above, but the 'Profile Name' field contains the text 'Manager'. The rest of the interface, including the sidebar navigation and the overall layout, remains the same.

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Setup Profiles Manager

Profile Manager

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.

Profile Detail

Name: Manager	User License: Salesforce Platform	Custom Profile: ✓
Description:	Created By: QOPAL_S 01/10/2023, 7:09 pm	Modified By: QOPAL_S 01/10/2023, 7:09 pm

Page Layouts

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

Record Type Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings	Visible	Default
Home	Default On	<input checked="" type="radio"/>
Accounts	Default On	<input checked="" type="radio"/>
Alert Settings	Default On	<input checked="" type="radio"/>

Learning: Default On

Libraries: Tab Hidden

Lightning Bolt Solutions: Default On

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Setup Profiles Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name: Manager	Save	Save & New	Cancel
User License: Salesforce Platform	Custom Profile: ✓		
Description:			

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings	Visible	Default
Home	Default On	<input checked="" type="radio"/>
Accounts	Default On	<input checked="" type="radio"/>
Alert Settings	Default On	<input checked="" type="radio"/>

Learning: Default On

Libraries: Tab Hidden

Lightning Bolt Solutions: Default On

Salesforce Developer Session | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

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

Communication Subscription Channel Types

	Individuals	Locations	Party Consents	Push Topics	Sellers	Streaming Channels	User External Credentials
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>					
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Salesforce Developer Session | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

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

Communication Subscription Channel Types

	Individuals	Locations	Party Consents	Push Topics	Sellers	Streaming Channels	User External Credentials
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>					
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Salesforce Developer Session | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

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

Custom Object Permissions

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

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Salesforce Developer Session | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

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

Custom Object Permissions

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

	Basic Access	Create	Edit	Delete	Data Administration	View All	Modify All
Enhancement Requests	<input checked="" 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

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Don't immediately expire links in forgot password emails

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Users

All Users

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

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

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
Edit Login	Adanna_Girva	dadan	test_girva_pas_4w@byt6jwkk.tszgrgat6kxyox_3qj8ofwyzwms.h43tkze6mea@gmail.com		<input checked="" type="checkbox"/>	JMS User
Edit	Chatter Expert	Chatter	chatty_005f000000bcakab.lc0nfwmpjke@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit Login	Ellington_Amelia	aelli	amelia.elington.1.46kxp9og0ih.dlcwyodcu4wh.hnbdwmywthbz.wguctor1daly@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
Edit	S_GOPAL	GS	kot520@gmail.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@0005000000bcakab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@0005000000bcakab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security 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

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Users

New User

User Edit

General Information

First Name	<input type="text"/>
Last Name	<input type="text"/>
Alias	<input type="text"/>
Email	<input type="text"/>
Username	<input type="text"/>
Nickname	<input type="text"/>
Title	<input type="text"/>
Company	<input type="text"/>
Department	<input type="text"/>
Division	<input type="text"/>

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

Marketing 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): | High-Contrast Palette on Charts: | Load Lightning Pages While Scrolling: | Debug Mode:

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

New User

User Edit Save Save & New Cancel

General Information

First Name	sowmya
Last Name	bala
Alias	sbala
Email	2k20cse179@kot.ac.in
Username	2k21it@kot.ac.in
Nickname	User16961677128256452616
Title	worker
Company	kot bank
Department	
Division	

Role: <None Specified>

User License: Salesforce Platform

Profile: Manager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

User: sowmya bala

User Detail

Name: sowmya bala

Alias: sbala

Email: 2k20cse179@kot.ac.in (Verify)

Username: 2k21it@kot.ac.in

Nickname: User16961677128256452616

Title: worker

Company: kot bank

Department:

Division:

Address:

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

Locale: English (India)

Language: English

Delegated Approver: Manager

Receive Approval Request Emails: Only if I am an approver

Federation ID:

App Registration: One Time Password Authentication:

App Registration: Salesforce Authenticator:

Role: Salesforce Platform

User License: Salesforce Platform

Profile: Manager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Mobile Push Registrations:

Data.com User Type:

Accessibility Mode (Classic Only):

Debug Mode:

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Salesforce CRM Content User:

Gmail

Compose

Inbox 5,318

support@salesforce.com <support@salesforce.com> to me 7:13 PM (0 minutes ago)

salesforce

Welcome to Salesforce!

Click below to verify your account.

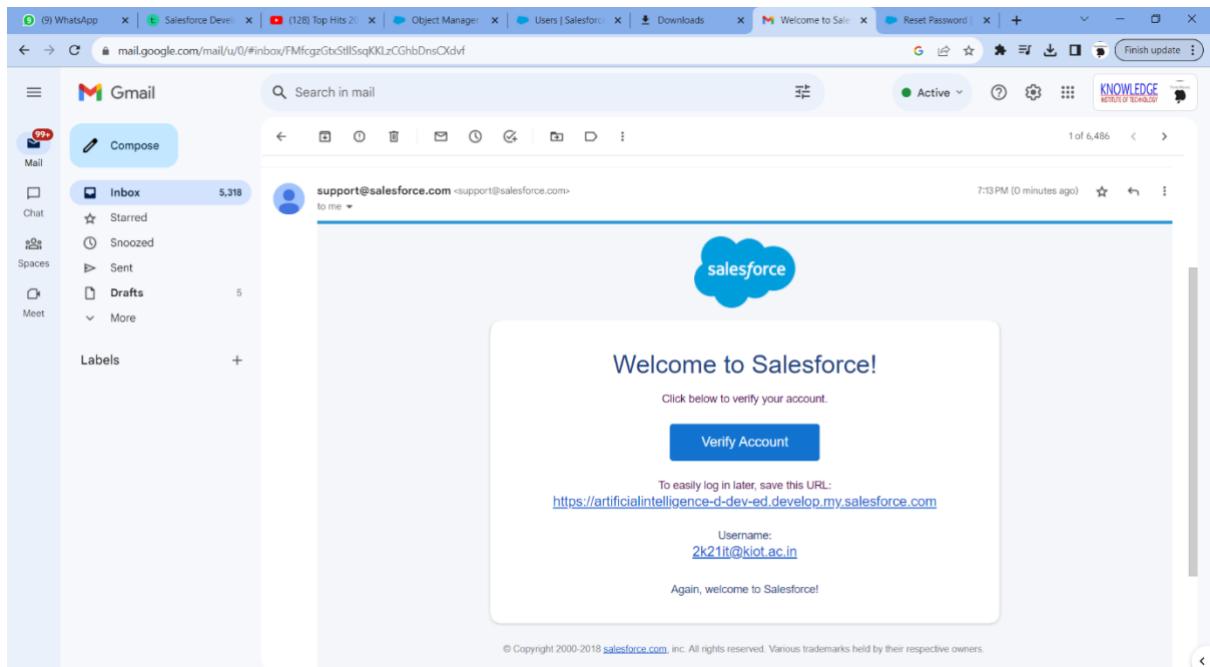
Verify Account

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

Username:
2k21it@kiot.ac.in

Again, welcome to Salesforce!

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salesforce

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

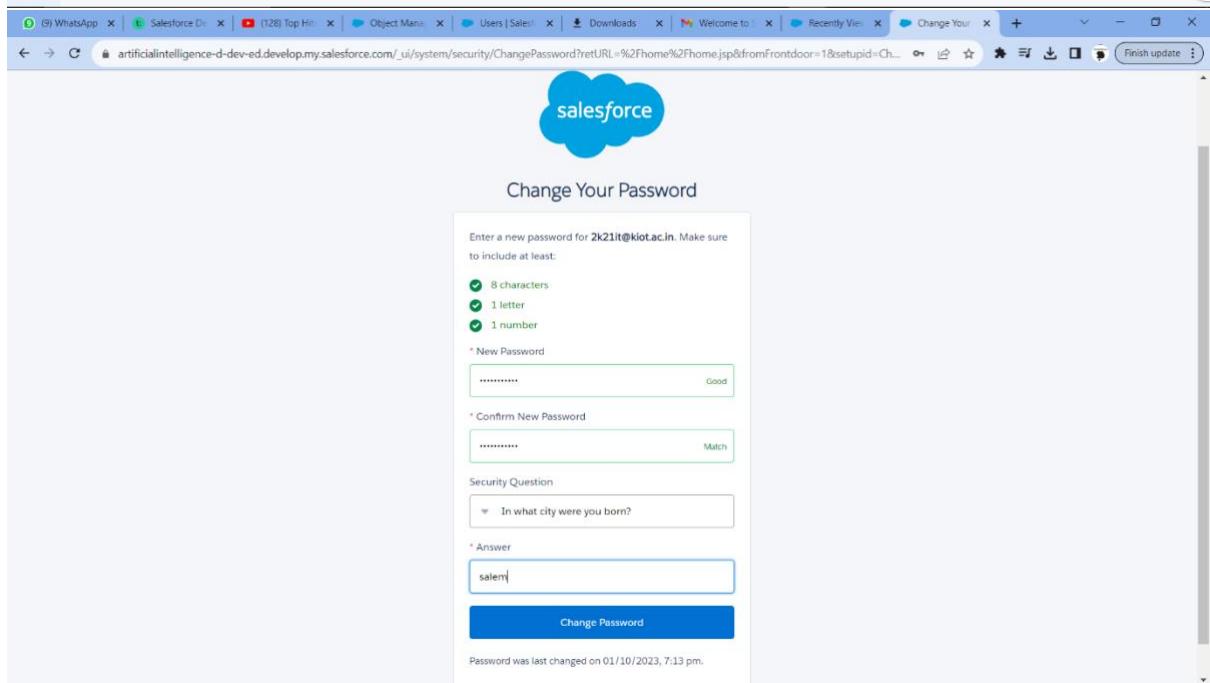
* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
salem

Change Password

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



Login | Salesforce

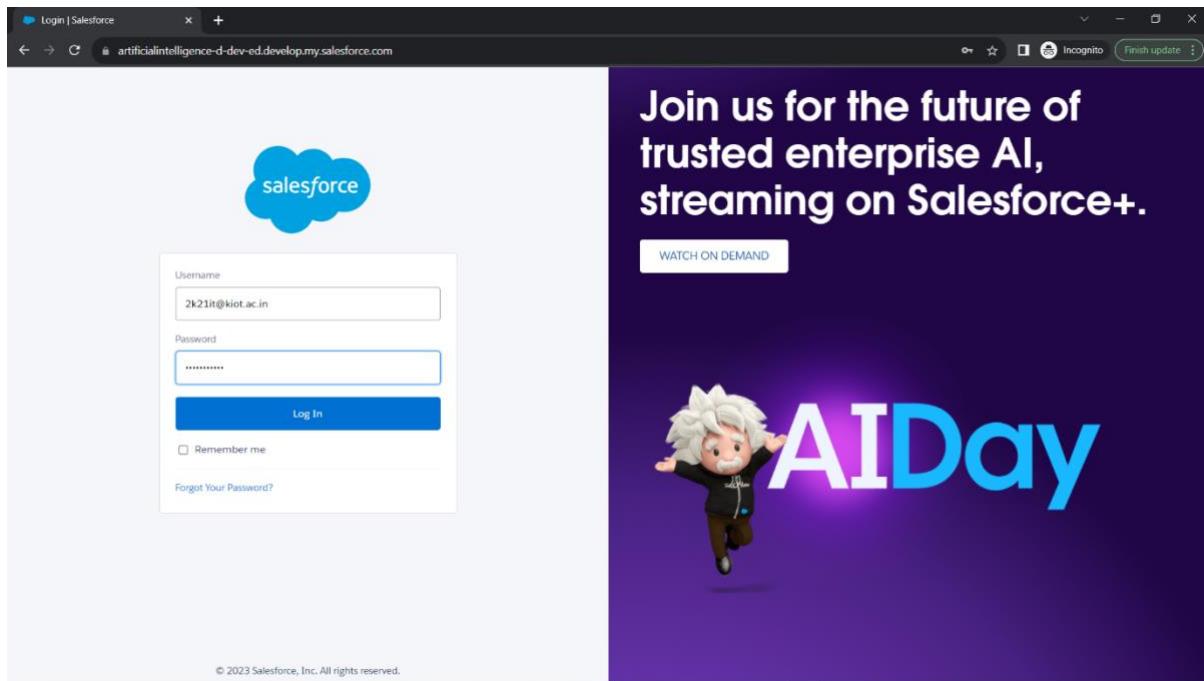
artificialintelligence-d-dev-ed.develop.my.salesforce.com

Incognito Finish update

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

WATCH ON DEMAND

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The screenshot shows the Salesforce login interface on the left and a promotional banner for "AI Day" on the right. The banner features a cartoon character with white hair and a black hoodie, running towards the right. The text "Join us for the future of trusted enterprise AI, streaming on Salesforce+" is displayed above the character, and "WATCH ON DEMAND" is a button below it. The bottom of the banner has the text "© 2023 Salesforce, Inc. All rights reserved.".

Recently Viewed | Bank | Salesfo

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

Incognito Finish update

kiot

Bank customers Home

Search...

Recently Viewed

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

Bank Name ↓

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

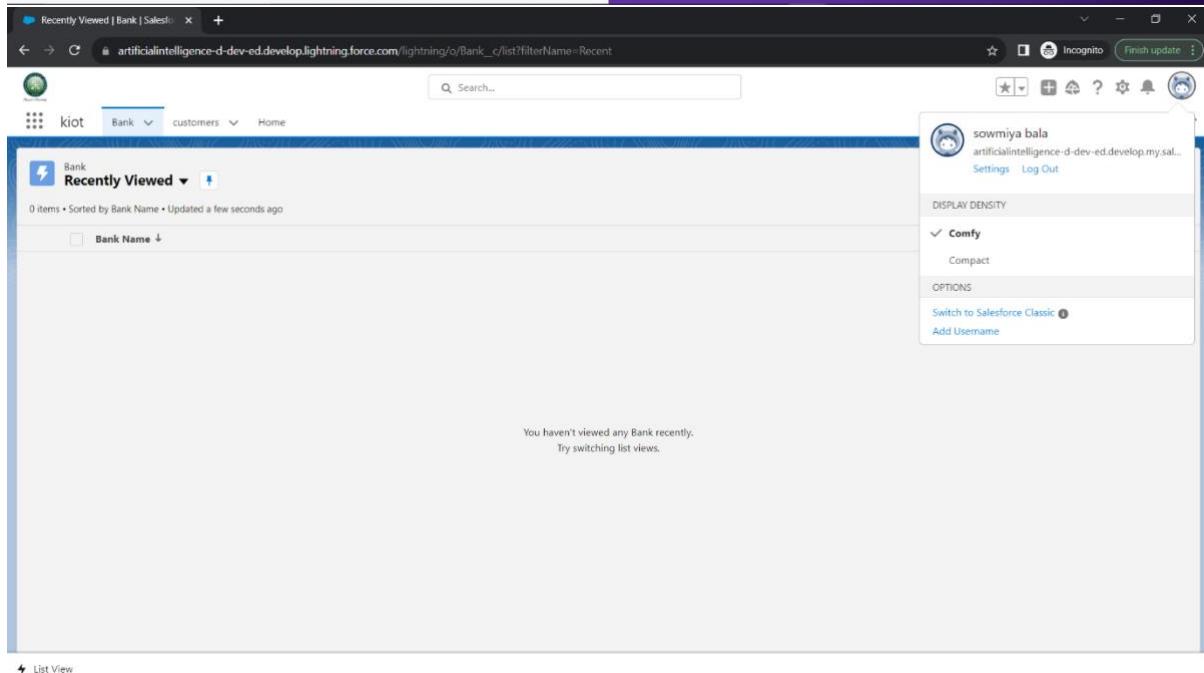
sowmiya bala
artificialintelligence-d-dev-ed.develop.my.sal...
Settings Log Out

DISPLAY DENSITY

✓ Comfy
Compact

OPTIONS

Switch to Salesforce Classic Add Username



The screenshot shows the Salesforce Lightning interface. On the left, there's a sidebar with navigation links like "kiot", "Bank", "customers", and "Home". A search bar is at the top. The main area displays a "Recently Viewed" list for "Bank". It shows a single item: "0 items • Sorted by Bank Name • Updated a few seconds ago". Below this, there's a sorting option "Bank Name ↓". A message at the bottom says "You haven't viewed any Bank recently. Try switching list views.". On the right, there's a user profile for "sowmiya bala" with options to "Settings" and "Log Out". A "DISPLAY DENSITY" dropdown is set to "Comfy", with "Compact" as another option. At the bottom, there are links to "Switch to Salesforce Classic" and "Add Username".

New Bank | Salesforce

Recently Viewed ▾

Bank Name

New Bank

Information

* = Required Information

*Bank Name	boi
Owner	sowmiya bala
phoneno	0997754534

Cancel Save & New Save

Bank customers Home

Search...

Incognito Finish update

List View

This screenshot shows the 'New Bank' form in the Salesforce Lightning interface. The form contains three required fields: 'Bank Name' (boi), 'Owner' (sowmiya bala), and 'phoneno' (0997754534). The 'Save' button at the bottom right is highlighted in blue.

New customer | Salesforce

Recently Viewed ▾

customer Name

New customer

Information

* = Required Information

*customer Name	madhu
*Bank	boi

Cancel Save & New Save

Bank customers Home

Search...

Incognito Finish update

List View

This screenshot shows the 'New customer' form in the Salesforce Lightning interface. The form contains two required fields: 'customer Name' (madhu) and 'Bank' (boi). The 'Save' button at the bottom right is highlighted in blue.

madhu | customer | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/r/customer__c/a025j00000f0YfaAAM/view

Incognito Finish update

Search...

kiot Bank customers Home

customer madhu

customer "madhu" was created.

New Contact Edit Delete

Related Details

customer Name
madhu

Bank
boi

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

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

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

- Header:** The title bar includes tabs for WhatsApp, Salesforce Developer Session 2, Top Hits 2023, New Post, Profiles | Salesforce, and Welcome to Salesforce: Verify... The URL is artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home.
- Left Sidebar:** The sidebar under "Setup" contains links for Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings).
- Search Bar:** A search bar at the top right says "Search Setup".
- Page Content:** The main content area is titled "Profiles" with a "SETUP" button. It displays a table of profiles:

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	salesmanager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>
- Page Bottom:** Includes navigation links for Previous, Next, Page 1 of 1, and a JavaScript footer.

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

Clone Profile

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page

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

Q Quick Find Search Setup

This screenshot shows the 'Clone Profile' page in the Salesforce Setup interface. It displays a message requiring the selection of an existing profile to clone. A table lists the 'Existing Profile' as 'Standard Platform User' and the 'User License' as 'Salesforce Platform'. The 'Profile Name' field contains 'salesmanager'. Below the table are 'Save' and 'Cancel' buttons. At the top right, there is a 'Help for this Page' link. The left sidebar shows various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, and User Management Settings.

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

Profile salesmanager

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.

Profile Detail

Name	salesmanager
User License	Salesforce Platform
Description	
Created By	GOPAL S 01/10/2023, 7:19 pm
Modified By	GOPAL S 01/10/2023, 7:19 pm

Custom Profile

Page Layouts

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

Help for this Page

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

Q Quick Find Search Setup

This screenshot shows the 'Profile salesmanager' page in the Salesforce Setup interface. It displays a summary of the profile, including its name, user license, and creation/modification details. The 'Custom Profile' checkbox is checked. The 'Page Layouts' section lists various standard object layouts assigned to the profile, such as Global Layout for Email Application and Order Layout for Home Page Layout. The left sidebar shows the same setup categories as the previous screenshot.

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

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

Profile Edit salesmanage

Profile Edit Name: salesmanage User License: Salesforce Platform Description: Custom Profile: ✓

Custom App Settings

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

Service Provider Access

Tab Settings

Standard Tab Settings Home Default On Learning Default On

Contact Point Email: User External Credentials:

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	Basic Access	Create	Edit	Delete	Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	View All	Modify All
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>	Don't immediately expire links in forgot password emails:	<input type="checkbox"/>				

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

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

Profile Edit salesmanage

Profile Edit Name: salesmanage User License: Salesforce Platform Description: Custom Profile: ✓

Custom App Settings

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

Service Provider Access

Tab Settings

Standard Tab Settings Home Default On Learning Default On

Contact Point Email: User External Credentials:

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	Basic Access	Create	Edit	Delete	Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	View All	Modify All
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>	Don't immediately expire links in forgot password emails:	<input type="checkbox"/>				

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

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Save | Save & New | Cancel

Salesforce Developer Session 2 | Users | Salesforce | Welcome to Salesforce: Verify...

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

New User

User Edit

General Information

First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Alias:	<input type="text"/>
Email:	<input type="text"/>
Username:	<input type="text"/>
Nickname:	<input type="text"/>
Title:	<input type="text"/>
Company:	<input type="text"/>
Department:	<input type="text"/>
Division:	<input type="text"/>

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing 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):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit

General Information

First Name	machhu
Last Name	b
Alias	mb
Email	2k20cse179@kiot.ac.in
Username	2k20cse179@kiot.ac.in
Nickname	User169618842428654192
Title	worker
Company	kiot bank
Department	Sales
Division	

Role <None Specified>

User License Salesforce Platform

Profile salesmanager

Active

Marketing 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)

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Help for this Page

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

Setup Home Object Manager

Search Setup

User Management Settings

Mailing Address

Street	
City	
Zip/Postal Code	
State/Province	
Country	

Single Sign On Information

Federation ID	
---------------	--

Locale Settings

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

Approver Settings

Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
<input checked="" type="checkbox"/> Generate new password and notify user immediately	

Save Save & New Cancel

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

Setup Home Object Manager

Q user

v Users

- Permission Set Groups
- Permission Sets
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- Messaging for In-App and Web User Verification
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu

SETUP Users

Mailing Address

Street	4/194, aryampalayam, uthamasolapuram ..
City	SALEM
Zip/Postal Code	636308
State/Province	TAMIL NADU
Country	

Single Sign On Information

Federation ID	
---------------	--

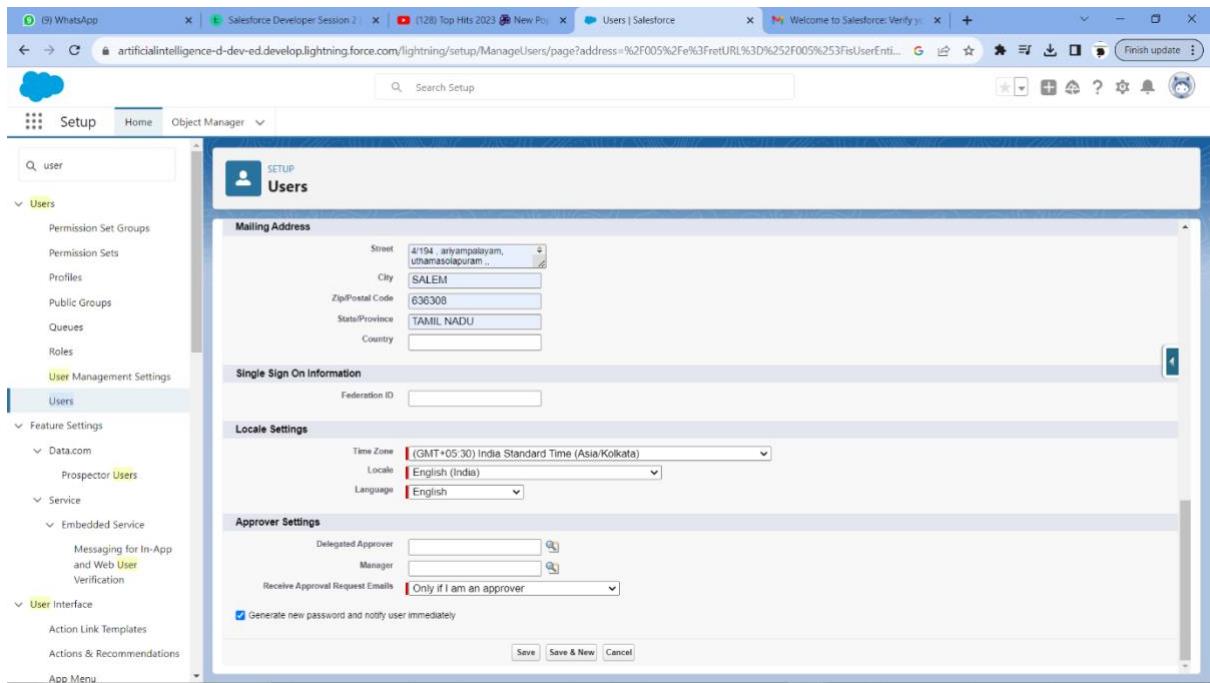
Locale Settings

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

Approver Settings

Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
<input checked="" type="checkbox"/> Generate new password and notify user immediately	

Save Save & New Cancel



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

Setup Home Object Manager

Q user

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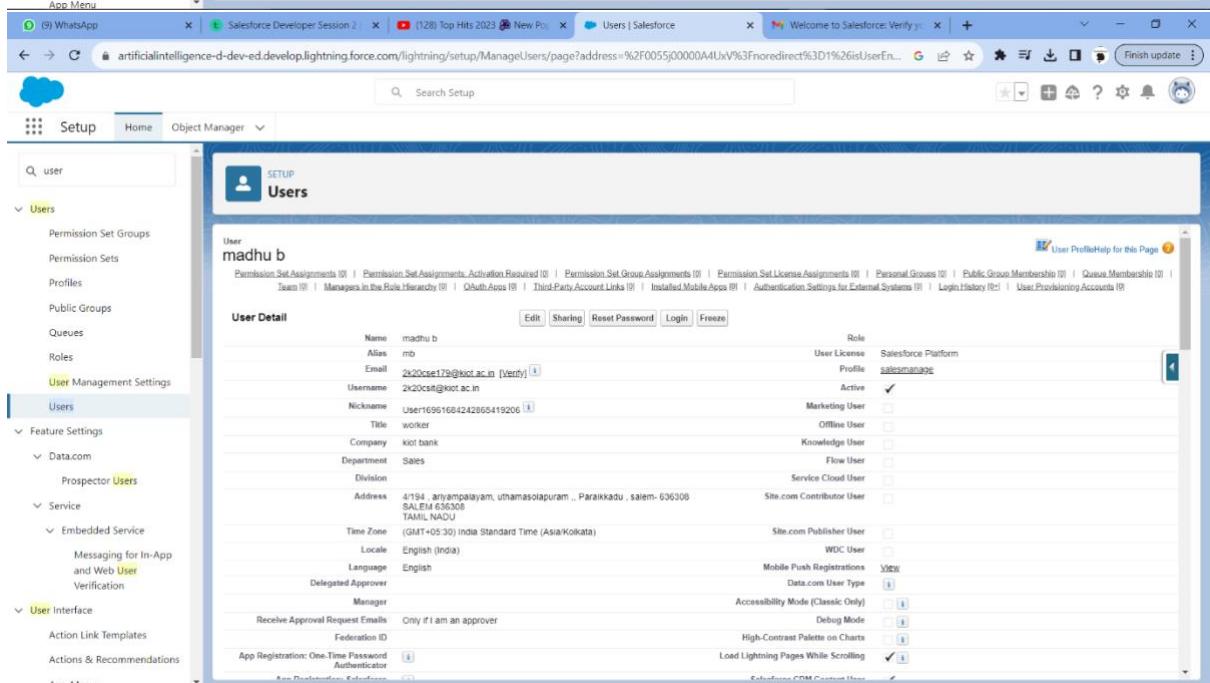
SETUP Users

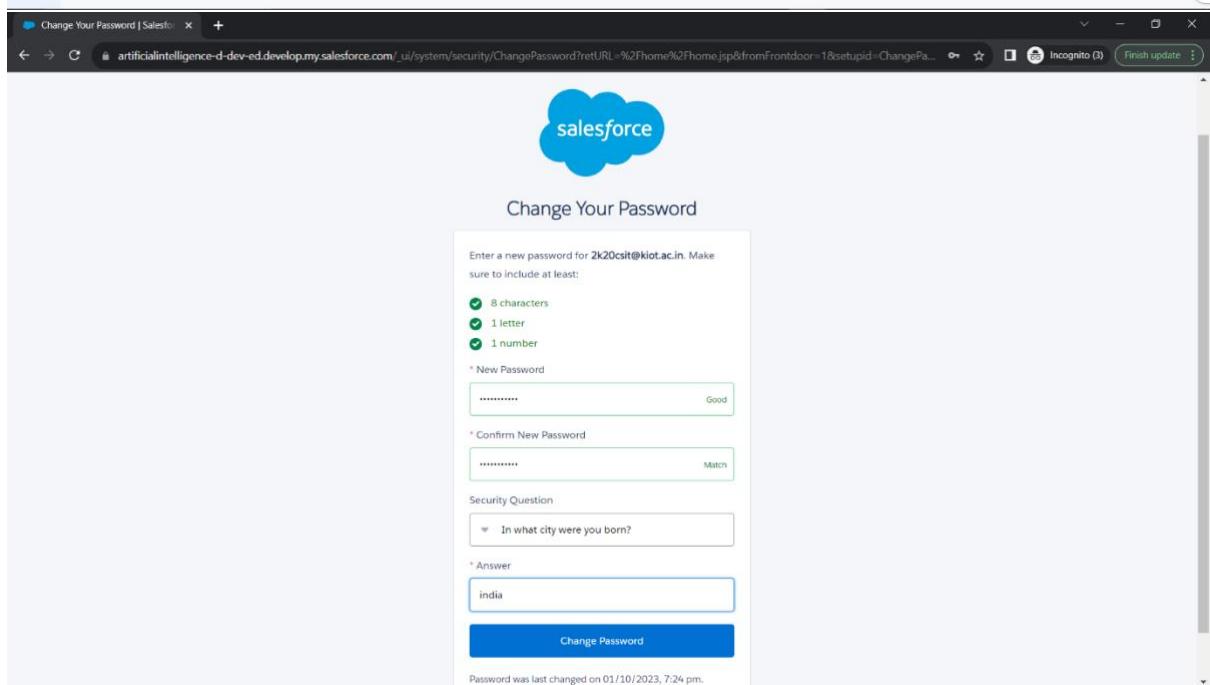
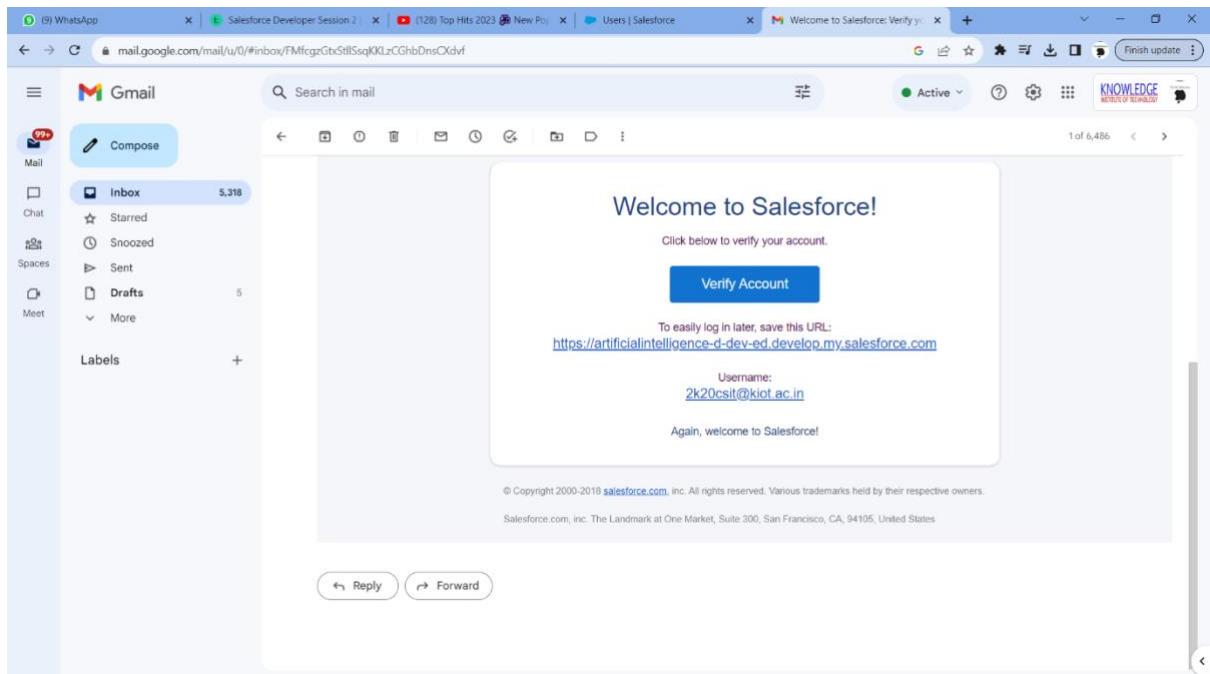
User madhu b

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

User Detail

Name	madhu b	Role	Salesforce Platform
Alias	mb	User License	salesmanager
Email	2k20cse179@kot.ac.in (Verify) [i]	Profile	<input checked="" type="checkbox"/>
Username	2k20cse179@kot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User16961684242865419206	Marketing User	<input type="checkbox"/>
Title	woker	Offline User	<input type="checkbox"/>
Company	kot bank	Knowledge User	<input type="checkbox"/>
Department	Sales	Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	4/194, aryampalayam, uthamasolapuram .. Paraiakkadu , salem- 636308	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input type="checkbox"/>
Language	English	Data.com User Type	<input type="checkbox"/>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager		Debug Mode	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/>
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator		Enhanced COM Component Usage	<input type="checkbox"/>





Recently Viewed | Bank | Salesforce

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

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

List View

Recently Viewed | customers | Salesforce

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

customers Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

(9) WhatsApp

Salesforce Developer Session

(128) Top Hits 2023

Permission Sets | Salesforce

Welcome to Salesforce!

Reset Password | Salesforce

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

Setup

Search Setup

Permission Sets

Help for this Page

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Access To Activities	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 and orders.	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 Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Admin	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor		Salesforce
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, sublocations, queue, and activity history.	Facility Manager
<input type="checkbox"/>	Field Service Mobile Standard PermSet	Give your mobile workforce access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/>	Merchandise	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper	Limited access to Order Management features for Self Service.	Lightning Order Management User

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

<https://artificialintelligence-d-dev-ed.develop.lightning.force.com/one/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 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 columns are 'Action', 'Permission Set Label', 'Description', and 'License'. The 'Permission Set Label' column lists various roles and features, such as 'Access to activity', 'Buyer', 'Buyer Manager', 'CRM User', etc. The 'Description' column provides a brief overview of the permissions granted by each set. The 'License' column indicates the specific license required for each set. The table is paginated at the bottom, showing page 1 of 2.

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 and...	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		Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Cloud Voice User
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Salesforce
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, publications, queu...	Facility Manager
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Admin	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Limited access to Order Management features for Self Service	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper		

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Vi | Reset Password | Salesforce | Finish update

Permission Sets

Create

Enter permission set information

Label: API Name: Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Help for this Page

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Vi | Reset Password | Salesforce | Finish update

Permission Sets

Create

Enter permission set information

Label: salesmanager API Name: salesmanager Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

License:

Help for this Page

Salesforce Developer Session | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Vi | Reset Password | Salesforce | Finish update

Permission Sets

salesmanager

Video Tutorial | Help for this Page

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

Permission Set Overview

Description	API Name	Namespace Prefix	Created By
License	salesmanager		GOPALS_ 01/10/2023, 7:29 pm
Session Activation Required	<input type="checkbox"/>		
Last Modified By	GOPALS_ 01/10/2023, 7:29 pm		

Apps

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

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

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

Learn More

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce | Finish update

Setup Home Object Manager

Q user

v Users

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

v Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

v User Interface

- Action Link Templates
- Actions & Recommendations

javascript:srcSet('!/%2FOP55j000008Phok%3Fs%3DentityPermissions%26sdtpl%3Dp1');

SETUP Permission Sets

Video Tutorial | Help for this Page

salesmanager

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

Permission Set Overview > Object Settings

Object Settings

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

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce | Finish update

Setup Home Object Manager

Q user

v Users

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- Actions & Recommendations

https://artificialintelligence-d-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/OP55j000008Phok%3Fs%3DentityPermissions&o=015j00002bfTh&sdtpl=p1

SETUP Permission Sets

Video Tutorial | Help for this Page

salesmanager

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

Permission Set Overview > Object Settings > Bank

Bank

Edit

Tab Settings

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

Object Permissions

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

Field Permissions

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

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce | Finish update

Permission Sets

Permission Set salesmanager

Object Settings Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Video Tutorial | Help for this Page

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce | Finish update

salesmanager

Current Assignments

No assignments defined.

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce! | Reset Password | Salesforce | Finish update

Select Users to Assign

All Users

Full Name	Role	Profile
Amelia Ellington	Force.com - App Subscription User	
Chatter Expert	Chatter Free User	
Diya Adanna	UMS User	
GOPAL S	System Administrator	
Integration User	Analytics Cloud Integration User	
madhu b	salesmanage	
Security User	Analytics Cloud Security User	
sowmya bala	Manager	

Cancel Next

Search Setup

Setup Home Object Manager

Q user

Users

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

Feature Settings

- Data.com
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User Interface

- Action Link Templates
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- App Menu

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce! | Reset Password | Salesforce | Finish update

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration 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

Search Setup

Setup Home Object Manager

Q user

Users

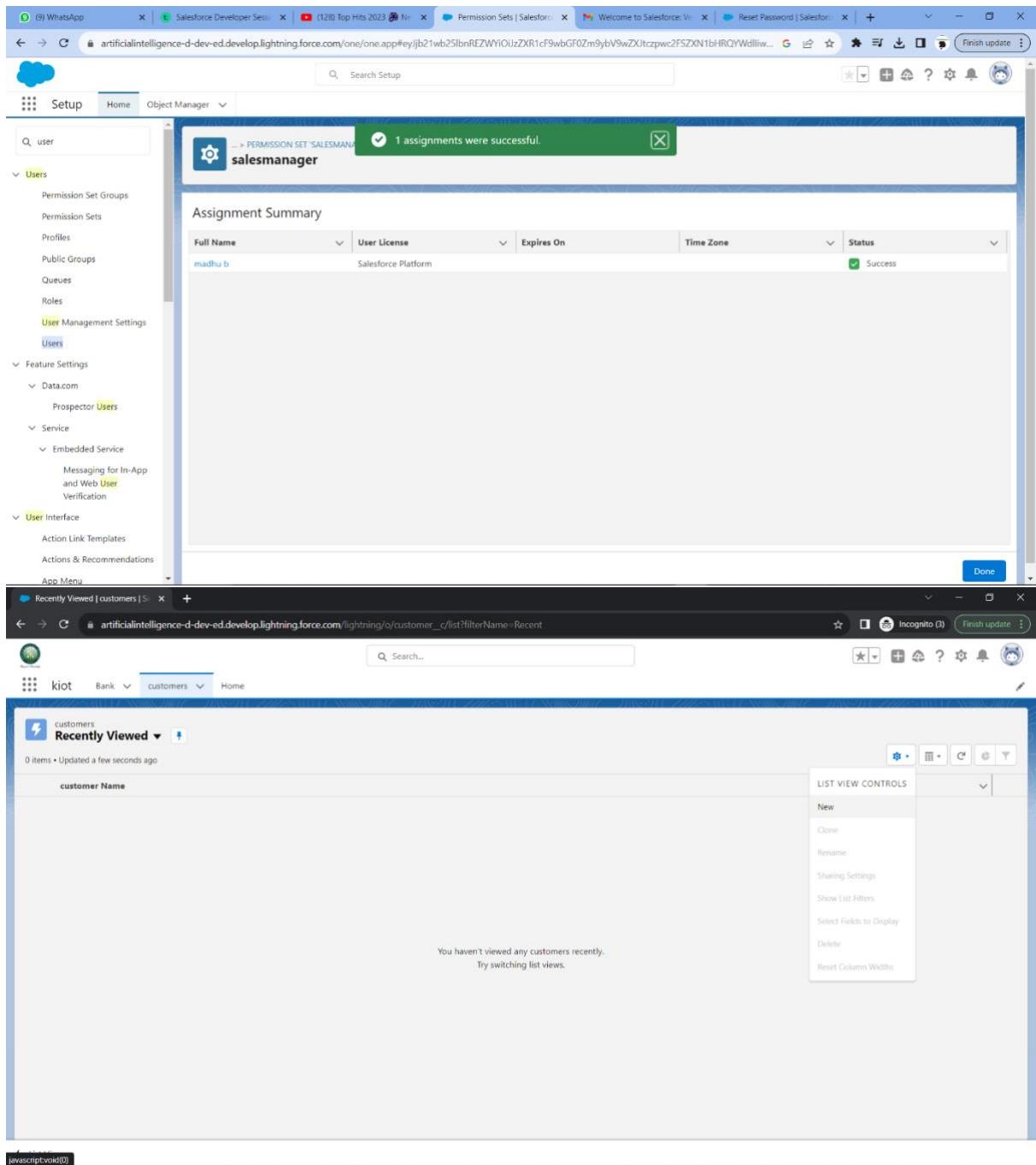
- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
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3.. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete 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 navigation includes 'Users' under 'Profiles'. The main content area displays a table of profiles with columns for Action, Profile Name, User License, and Custom settings. The 'Profile Name' column lists various profiles such as 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External', etc. The 'User License' column shows licenses like 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External', etc. The 'Custom' column contains checkboxes, many of which are checked. A search bar at the top right says 'Search Setup'.

Step 2:

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

The screenshot shows the 'Clone Profile' page in the Salesforce Setup. The left sidebar navigation includes 'Users' under 'Profiles'. The main content area has a form titled 'Clone Profile' with a note 'Enter the name of the new profile.' and a warning 'You must select an existing profile to clone from.' It shows an 'Existing Profile' dropdown set to 'Standard Platform User', a 'User License' dropdown set to 'Salesforce Platform', and a 'Profile Name' input field containing 'Jaga'. Below the form are 'Save' and 'Cancel' buttons. The status bar at the bottom indicates it's 08:21 AM on 01-10-2023.

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

Step 3:

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

Profiles | Salesforce

http://kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%3Fsetupid%3DEnhancedProfiles

Setup Home Object Manager

Search Setup

Profile Jaga

Profile Detail

Name	Jaga	User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description		Created By	Jagadeesh S 01/10/2023, 8:21 am	Modified By	Jagadeesh S 01/10/2023, 8:21 am

Page Layouts

Standard Object Layouts	Global	Operating Hours
Email Application	Global Layout [View Assignment]	Order Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product Layout [View Assignment]
Account	Account Layout [View Assignment]	Payments Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment Authorizations Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]

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

25°C Partly sunny

Search

Cloud File Explorer Home Help

ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Profile Jaga

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees:

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

Did you find what you're looking for?
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Search

Cloud File Explorer Home Help

ENG IN 08:21 AM 01-10-2023

The screenshot shows the 'Profiles' setup page in Salesforce. The left sidebar is titled 'Users' and includes options for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a 'Prospector Users' section. The main content area is titled 'SETUP Profiles' and displays a grid of permissions for various objects. The grid has sections for 'Communication Subscription Consents', 'Communication Subscription Timings', 'Contacts', 'Contact Point Addresses', 'Contact Point Consents', 'Contact Point Emails', 'Locations', 'Party Consents', 'Push Topics', 'Sellers', 'Streaming Channels', and 'User External Credentials'. Each section contains a table with columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). Below the grid, there are 'Custom Object Permissions' sections for 'Providers' and 'Resources'. At the bottom, there are 'Session Settings' for session times out after 2 hours of inactivity and session security levels required at login (None). The status bar at the bottom right shows it's 08:21 AM on 01-10-2023.

The screenshot shows the 'Profile Edit' page for a profile named 'Jaga'. The left sidebar is identical to the previous screenshot. The main content area is titled 'Profile Edit Jaga' and says 'Set the permissions and page layouts for this profile.' It includes a 'Profile Edit' section with fields for Name (Jaga), User License (Salesforce Platform), and Description. There is a 'Custom Profile' checkbox checked. Below this are 'Custom App Settings' and 'Service Provider Access' sections. Under 'Custom App Settings', there are sections for Analytics Studio, App Launcher, and Hive App, each with 'Visible' and 'Default' checkboxes. Under 'Service Provider Access', there is a 'Tab Settings' section with a checkbox for 'Override users' personal tab customizations'. The status bar at the bottom right shows it's 08:21 AM on 01-10-2023.

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 under the 'Profiles' section. On the left sidebar, 'Users' is selected. The main area displays a table titled 'All Profiles' with one row for 'Jaga'. The 'Profile Name' is 'Jaga', 'User License' is 'Salesforce Platform', and 'Custom' is checked. The status bar at the bottom indicates it's page 1 of 1.

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 under the 'Users' section. On the left sidebar, 'Users' is selected. The main area displays a table titled 'All Users' with several rows of users. The columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The 'Active' column for most users has a checked checkbox, while for 'Customer Community User' and 'Standard Platform User', it is unchecked. The status bar at the bottom indicates it's page 1 of 1.

The screenshot shows the 'New User' page in the Salesforce Setup. The user information is as follows:

- General Information:**
 - First Name: Jagadesh11
 - Last Name: S
 - Alias: J
 - Email: jnwr123@gmail.com
 - Username: jnwr123@gmail.com
 - Nickname: User169612875144962592
 - Title:
 - Company:
 - Department:
 - Division:
- Role:** Director, Channel Sales
- User License:** Salesforce Platform
- Profile:** Standard Platform User
- Active:** None
- Marketing User:** Standard Platform User
- Offline User:** None
- Knowledge User:** None
- Flow User:** None
- Service Cloud User:** None
- Site.com Contributor User:** None
- Site.com Publisher User:** None
- WDC User:** None
- Data.com User Type:** None
- Data.com Monthly Addition Limit:** Default Limit (300)
- Accessibility Mode (Classic Only):** None
- High-Contrast Palette on Charts:** None

The screenshot shows the 'New User' page in the Salesforce Setup. The user information is as follows:

- General Information:**
 - First Name: Jagadesh22
 - Last Name: S
 - Alias: J
 - Email: jnwt1@gmail.com
 - Username: jnwt1@gmail.com
 - Nickname: User169612879983618745
 - Title:
 - Company:
 - Department:
 - Division:
- Role:** Marketing Team
- User License:** Salesforce Platform
- Profile:** Standard Platform User
- Active:** Jagade
- Marketing User:** Standard Platform User
- Offline User:** None
- Knowledge User:** None
- Flow User:** None
- Service Cloud User:** None
- Site.com Contributor User:** None
- Site.com Publisher User:** None
- WDC User:** None
- Data.com User Type:** None
- Data.com Monthly Addition Limit:** Default Limit (300)
- Accessibility Mode (Classic Only):** None
- High-Contrast Palette on Charts:** None

The screenshot shows the 'All Users' page in the Salesforce Setup. The table lists the following users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	S.Jagade	J	jnwt09@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S.Jagade22	J	w0x@gmail.com	SE Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S.Jagade22	J	jnwt117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	S.Jagade2211	J	test123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jagade
<input checked="" type="checkbox"/>	S.Jagade222	J	test123@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jnwt

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

Step 6:

Now the two user as been created with the profile so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can be created as setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.

The screenshot shows the 'Permission Sets' page in the Salesforce Setup. The left sidebar under 'Users' is expanded, showing 'Permission Set Groups' and 'Permission Sets'. The main area displays a table of permission sets with columns for Action, Permission Set Label, Description, and License. Some rows are collapsed. A navigation bar at the bottom includes links for 'New', 'Edit', 'Delete', and 'Create New View'. A help link 'Help for this Page' is also present.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Guest	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	B2B Buyer Manager	Includes all buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers tha...	Salesforce
<input type="checkbox"/>	Facility Manager	Facility Manager	Facility Manager
<input type="checkbox"/>	FieldServiceMobileStandardPermis...	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	Merchandise	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User

The screenshot shows the 'Create' page for a new permission set. The left sidebar under 'Users' is expanded, showing 'Permission Set Groups' and 'Permission Sets'. The main area has a form titled 'Enter permission set information' with fields for 'Label' (set to 'permission12'), 'API Name' (set to 'permission12'), and 'Description'. Below this is a section 'Select the type of users who will use this permission set' with a note about who will use the permission set. At the bottom, there is a 'License' dropdown set to '-None-' and a 'Save' button.

Permission Sets | Salesforce

Search Setup

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

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SEARCH

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

Permission Set Overview

Description License Session Activation Required Last Modified By

Assigned Apps

Assigned Connected Apps

Object Settings

App Permissions

Apex Class Access

Visualforce Page Access

External Data Source Access

Video Tutorial | Help for this Page

08:24 AM 01-10-2023 ENG IN

Permission Sets | Salesforce

Search Setup

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

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SEARCH

Object Settings

Object Name Account Account No Access 9 —

No Access 44 —

No Access — —

No Access — —

No Access 27 —

No Access 14 —

No Access — —

No Access — —

No Access 3 —

No Access 17 —

— 4 —

No Access — —

No Access — —

No Access 6 —

No Access 30 —

No Access 18 —

Total Fields Tab Settings

Video Tutorial | Help for this Page

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Permission Sets | Salesforce

Search Setup

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

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SEARCH

Accounts

Object Permissions

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

Field Permissions

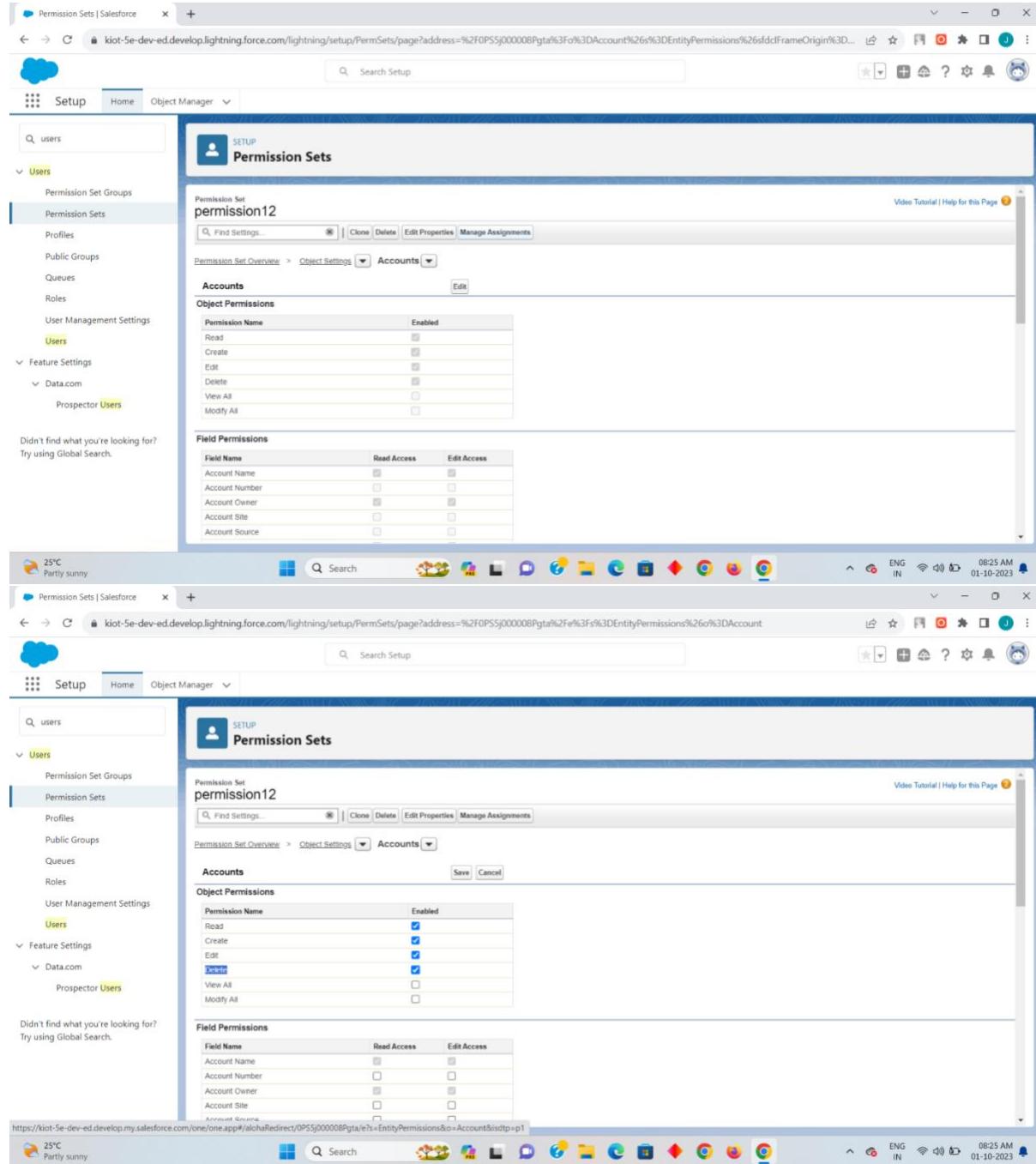
Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input type="checkbox"/>	<input type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source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

Video Tutorial | Help for this Page

08:25 AM 01-10-2023 ENG IN

Step 7:

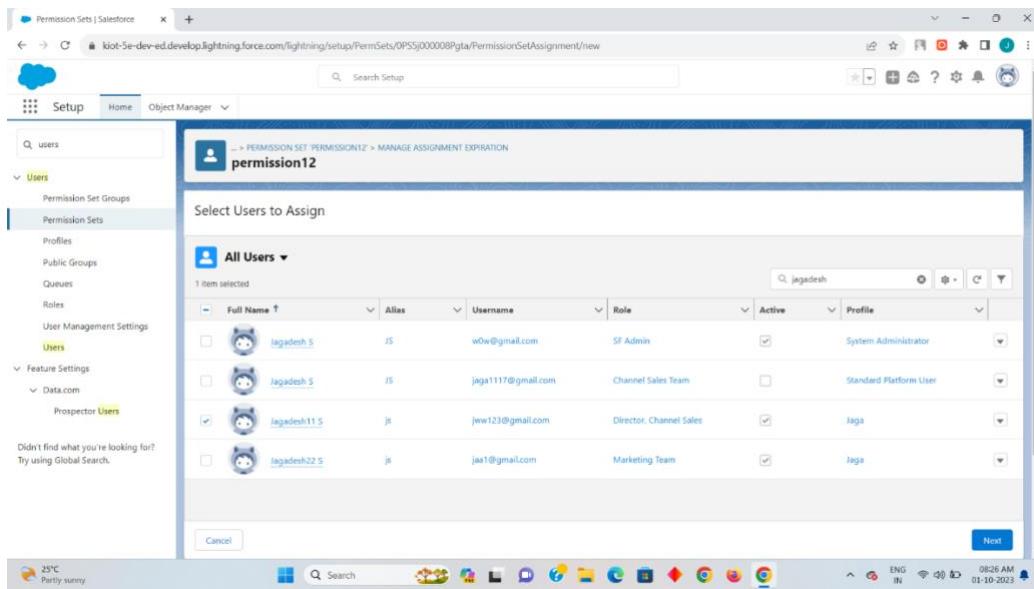
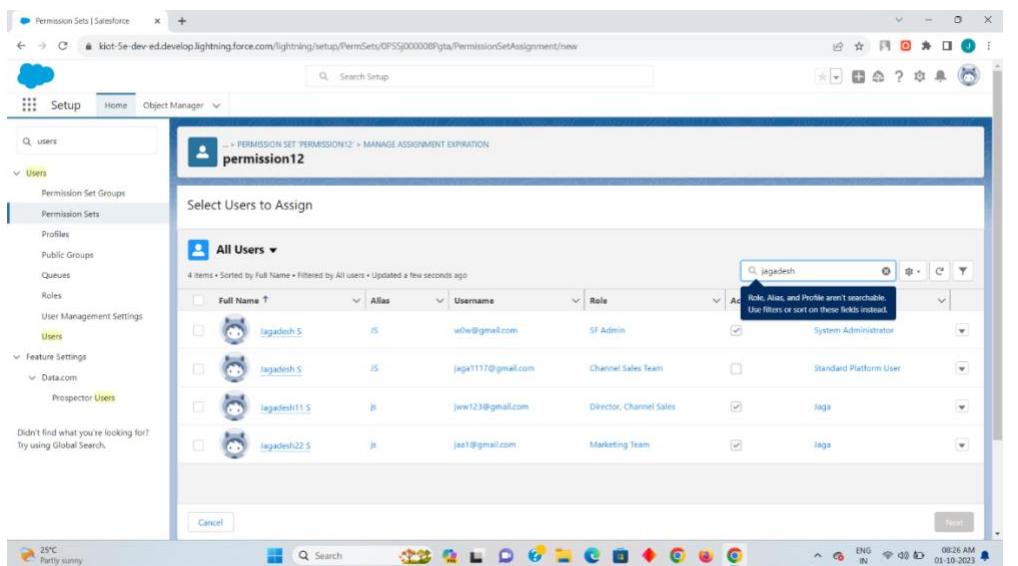
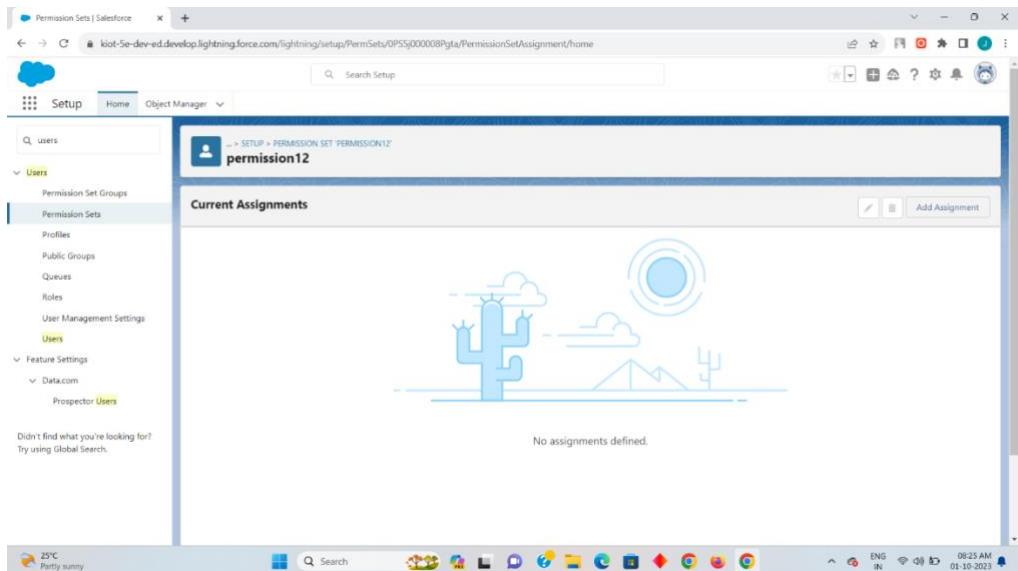
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.



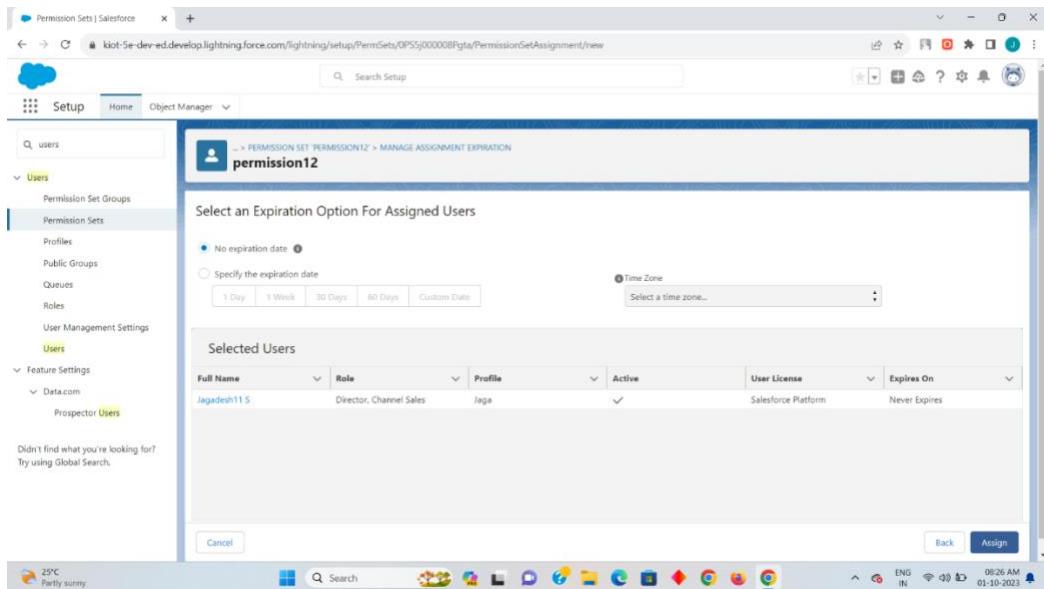
The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar is collapsed, and the main area displays the 'Permission Sets' page for a permission set named 'permission12'. The 'Object Settings' dropdown is set to 'Accounts'. In the 'Object Permissions' section, the 'Delete' checkbox is checked under the 'Edit' row. In the 'Field Permissions' section, the 'Account Source' field has both 'Read Access' and 'Edit Access' checkboxes checked. The status bar at the bottom indicates the URL as <https://kiot-5e-dev-ed.my.salesforce.com/beta/beta.app#/alphaRedirect/0F5j000008Pgta/e?isEntityPermissions&do=Account&isSdtp=p1>.

Step 8:

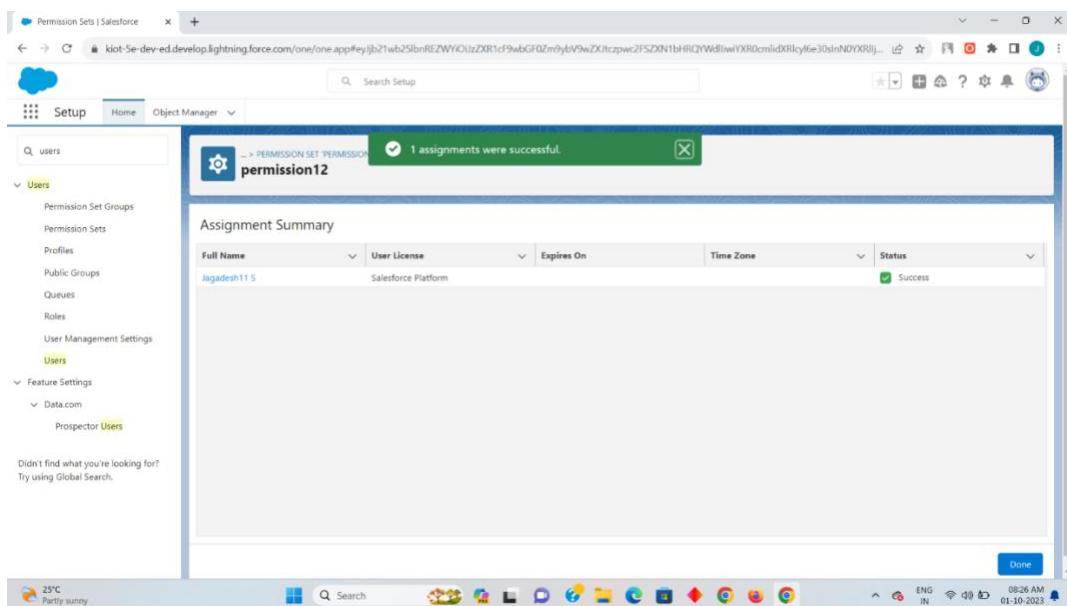
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



- Click on next.



- Now click on Assign.



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

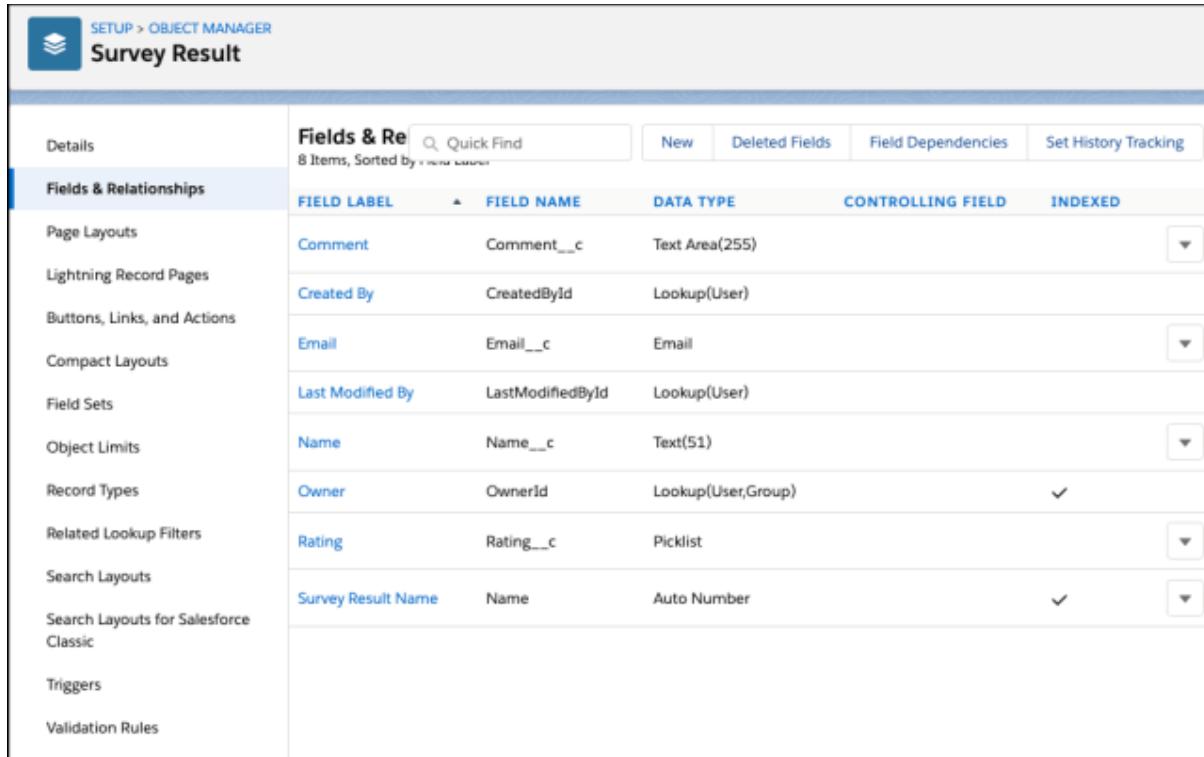
4. Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

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

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



The screenshot shows the Salesforce Object Manager interface for creating a custom object named 'Survey Result'. The 'Fields & Relationships' tab is selected. A table lists the fields with their labels, names, data types, controlling fields, and indexing status.

	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Comment	Comment	Comment__c	Text Area(255)		
Created By	Created By	CreatedById	Lookup(User)		
Email	Email	Email__c	Email		
Last Modified By	Last Modified By	LastModifiedById	Lookup(User)		
Name	Name	Name__c	Text(51)		
Owner	Owner	OwnerId	Lookup(User,Group)	✓	
Rating	Rating	Rating__c	Picklist		
Survey Result Name	Survey Result Name	Name	Auto Number	✓	

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.

Email Template
Thank You Email - Survey

[Edit in Builder](#) [Edit](#) [Clone](#) ▾

Details	Related
Information	
Email Template Name Thank You Email - Survey	Related Entity Type Survey Result
Description	Folder Public Email Templates
Made in Email Template Builder <input checked="" type="checkbox"/>	
Message Content	
Subject Thank You For Completing Our Survey!	Enhanced Letterhead
HTML Value	<p>Hi {{Survey_Result__c.Name__c}},</p> <p>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.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>
Additional Information	
Created By Rakesh Gupta , 12/21/2020, 4:23 PM	Last Modified By Rakesh Gupta , 12/21/2020, 4:32 PM

Step 3: Create an Email Alert

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

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

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text" value="Comment"/> A_a
Email__c	<input type="text" value="Email > Value"/> A_a
Name__c	<input type="text" value="(!Name.firstName) (!Name.lastName)"/> A_a
Rating__c	<input type="text" value="Rating"/> A_a

[+ Add Field](#)

Manually assign variables

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

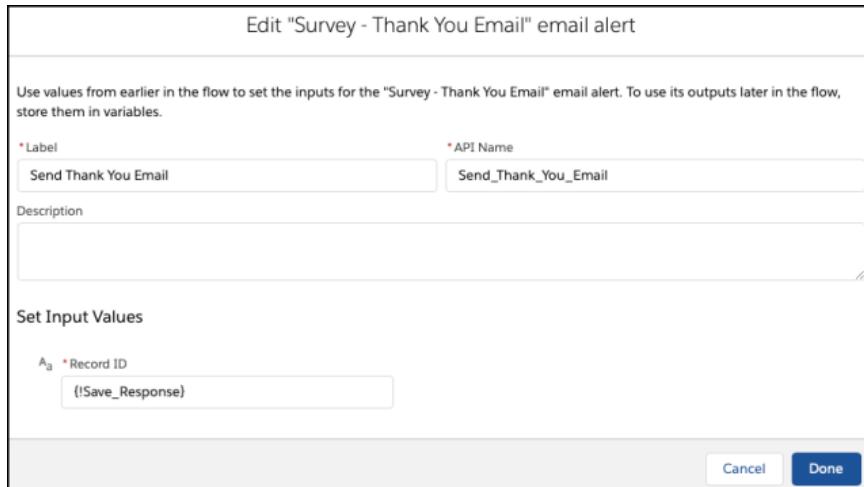
Step 4:

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

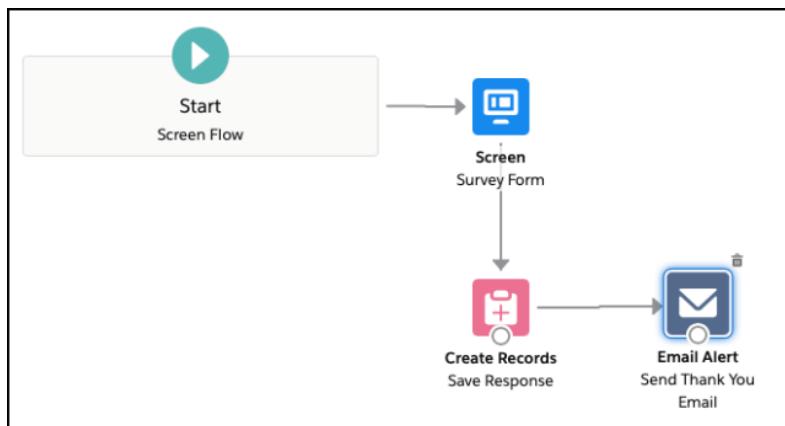
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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 * Flow API Name

Survey 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:	Type:	Version Number:
Active	Screen Flow	2

Cancel **Save**

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

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

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

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

- Toolbar:** File, Edit, Debug, Test, Workspace, Help.
- Tab:** 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. In the Quick Find box, type **Visualforce Pages**.
2. Clicks on the **New** button.
3. Copy code from [GitHub](#) and paste it into your visualforce page
4. Click **Save**.

The screenshot shows the Visualforce Page Editor for a page named 'Survey'. The 'Page Information' section includes fields for Label ('Survey'), Name ('Survey'), and Description. It also has checkboxes for 'Available for Lightning Experience, Experience Builder sites, and the mobile app' (checked) and 'Require CSRF protection on GET request' (unchecked). The 'Visualforce Markup' tab displays the following Apex code:

```

1 <apex:page showheader="false" lightningStylesheets="true">
2 <html>
3   <head>
4     <apex:includeLightning />
5     <!-- Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualf
6   </head>
7   <body class="slds-scope">
8     <div id="flowContainer" />
9     <script>
10       var statusChange = function (event) {
11         if(event.getParam("status") === "FINISHED") {
12           var outputVariables = event.getParam("outputVariables");
13           var key;
14           for(key in outputVariables) {
15             if(outputVariables[key].name === "myOutput") {
16               ...
17             }
18           }
19         }
20       };
21       $Lightning.use("c:VFPageToLC", function() {
22         $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
23         "flowContainer",
24         function (component) {
25           component.startFlow("Survey");
26         }
27       });
28     </script>
29   </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**.

The screenshot shows the 'Site Edit' screen for creating a new site. The 'Site Label' is set to 'Survey' and the 'Site Name' is also 'Survey'. The 'Site Description' field is empty. Under 'Active Site Home Page', 'Survey' is selected. Under 'Inactive Site Home Page', 'InMaintenance' is selected. Other settings include 'Site Template' (SiteTemplate), 'Site Robots.txt' (empty), 'Site Favorite Icon' (empty), 'Analytics Tracking Code' (empty), 'URL Rewriter Class' (empty), and 'Enable Feeds' (unchecked). Protection settings include 'Clickjack Protection Level' (Allow framing by the same origin only (Recommended)), 'Require Secure Connections (HTTPS)' (checked), 'Lightning Features for Guest Users' (checked), 'Upgrade all requests to HTTPS' (checked), 'Enable Content Sniffing Protection' (checked), 'Enable Browser Cross Site Scripting Protection' (checked), 'Referrer URL Protection' (checked), and 'Guest Access to the Payments API' (unchecked).

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

Proof of Concept

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

The form has the following fields:

- Name
- First Name: Alok
- Last Name: Sinfal
- *Email: [Redacted]
- *Rating: 5
- *Comment: Awesome Blog

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

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

