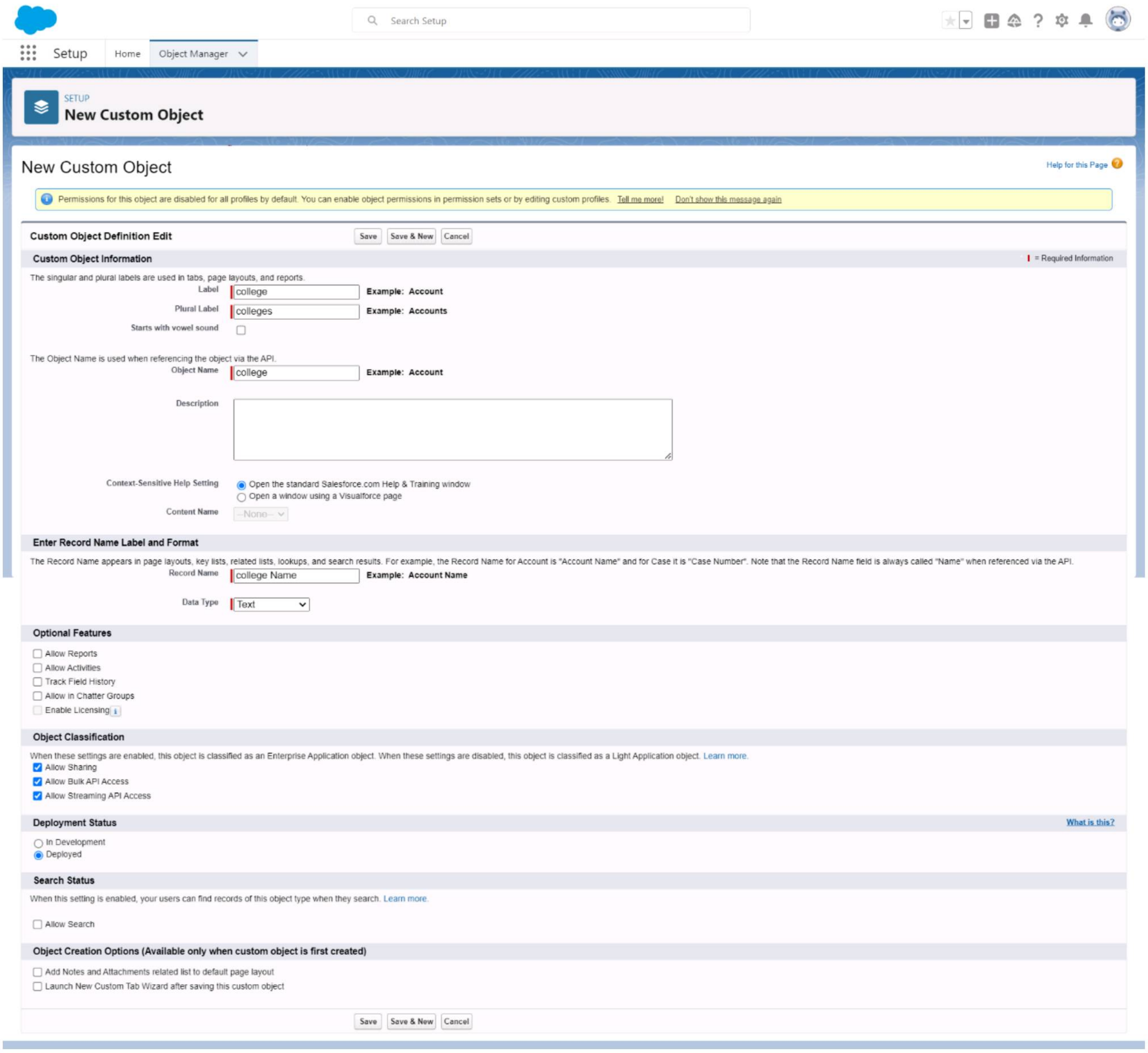
1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

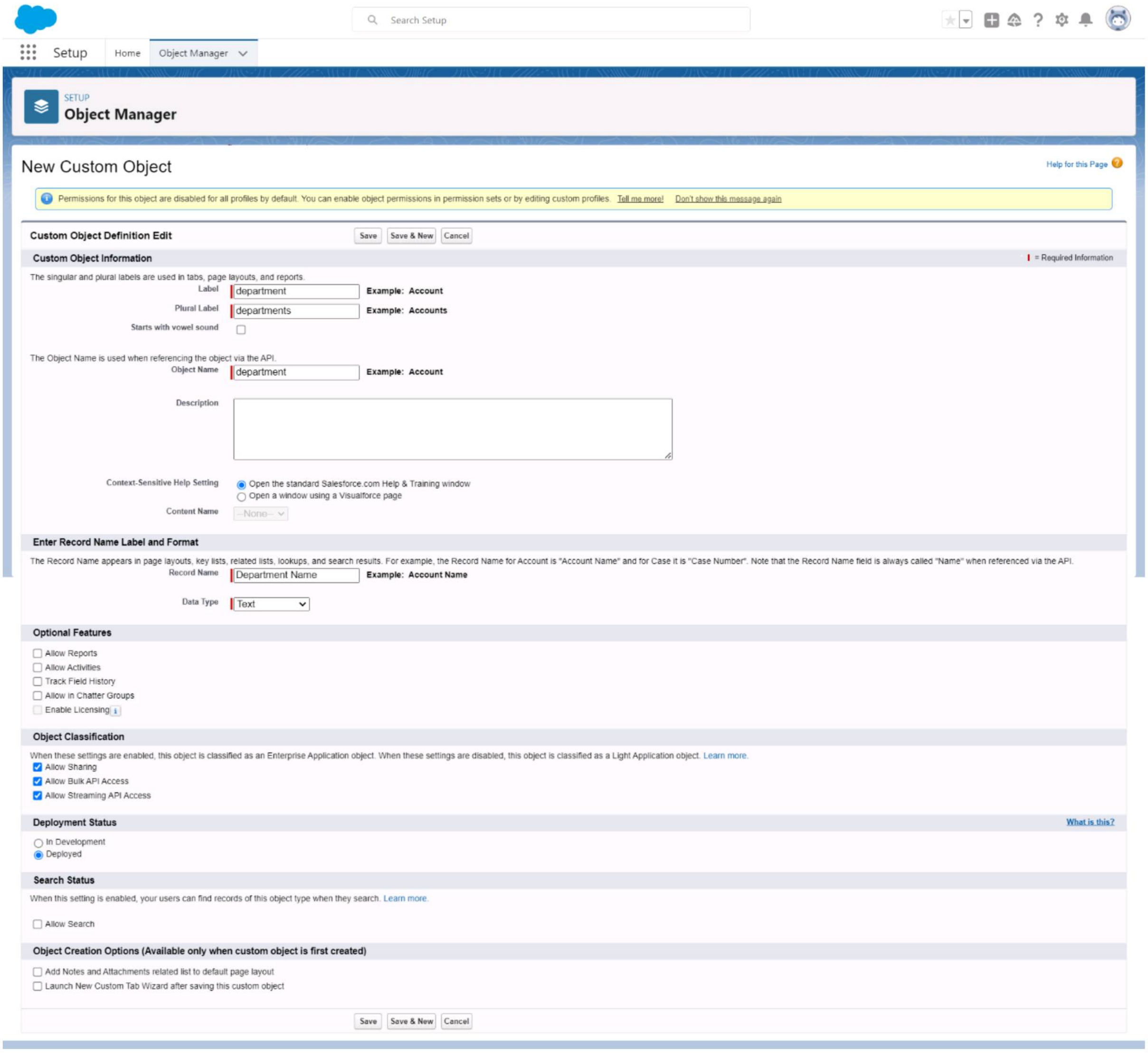
Solution:

Step 1: Create Custom Objects

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



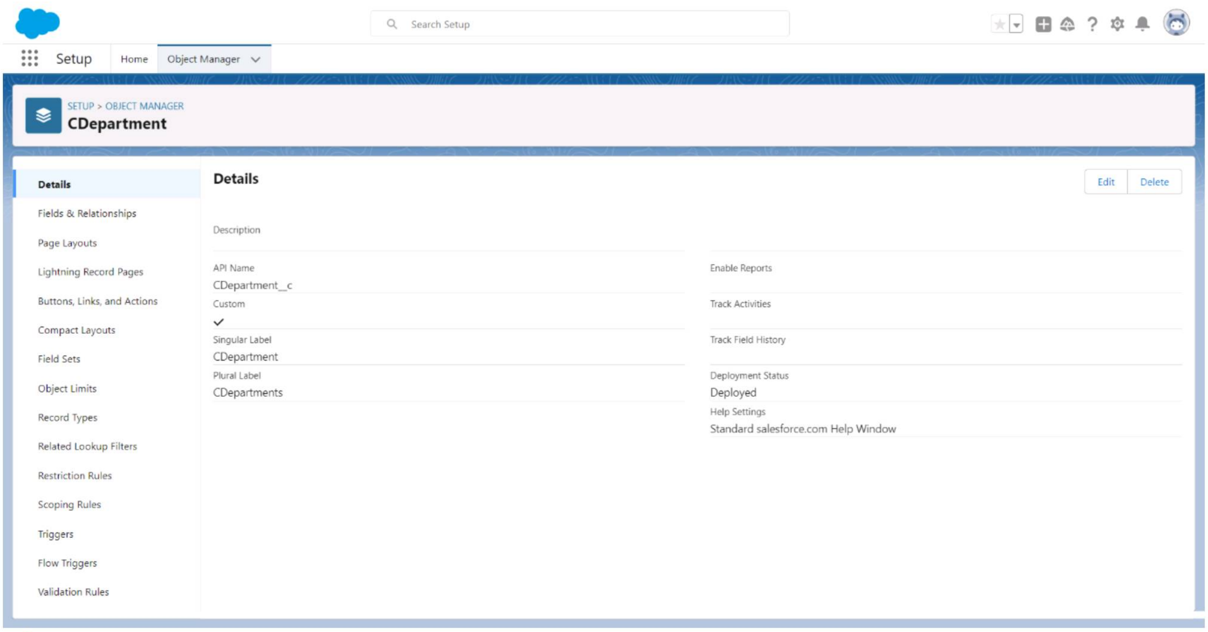
Second custom objects, let's call them "Department_C"

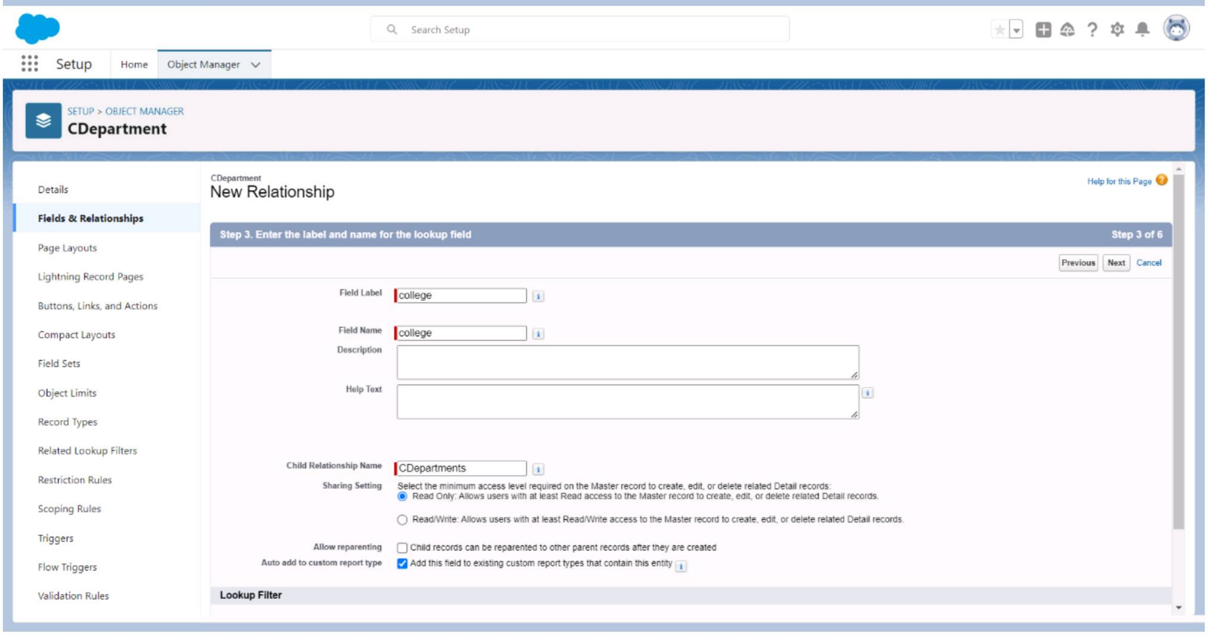

Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
department
Example: Account
Plural Label
departments
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
department
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Department Name
Example: Account Name
Data Type
Text
Optional Features
Allow Reports
Allow Activities
Track Field History
Allow in Chatter Groups
Enable Licensing
Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
What is this?
In Development
Deployed
Search Status
When this setting is enabled, your users can find records of this object type when they search. Learn more.
Allow Search
Object Creation Options (Available only when custom object is first created)
Add Notes and Attachments related list to default page layout
Launch New Custom Tab Wizard after saving this custom object
Save
Save & New
Cancel

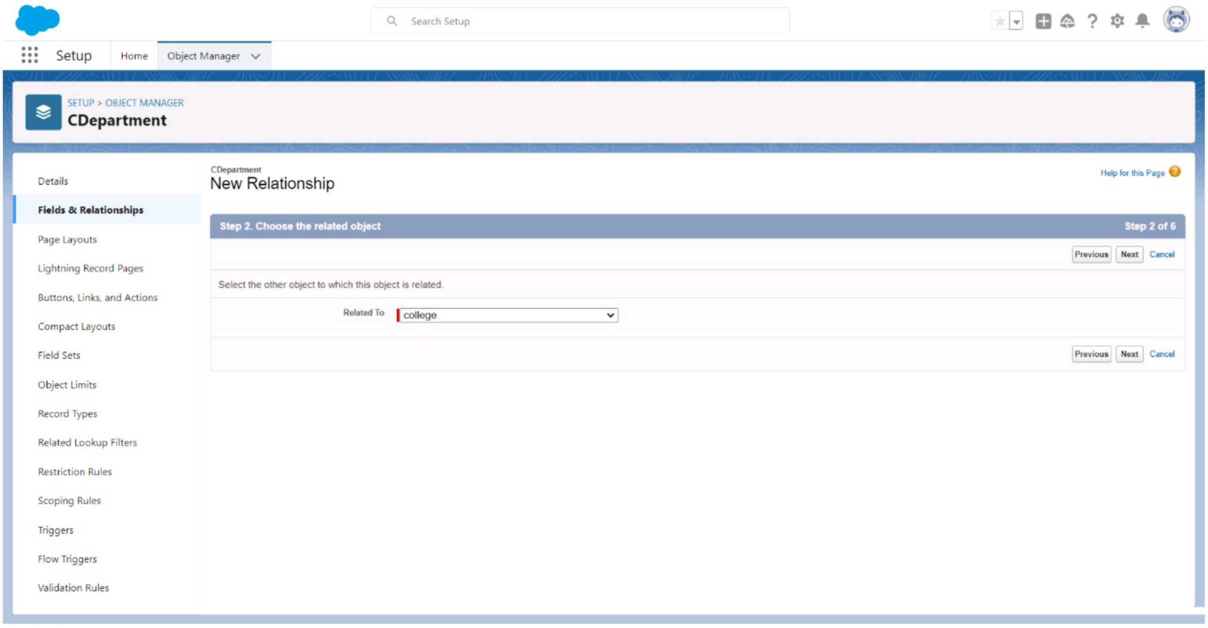
Step 2: Create a Master-Detail Relationship

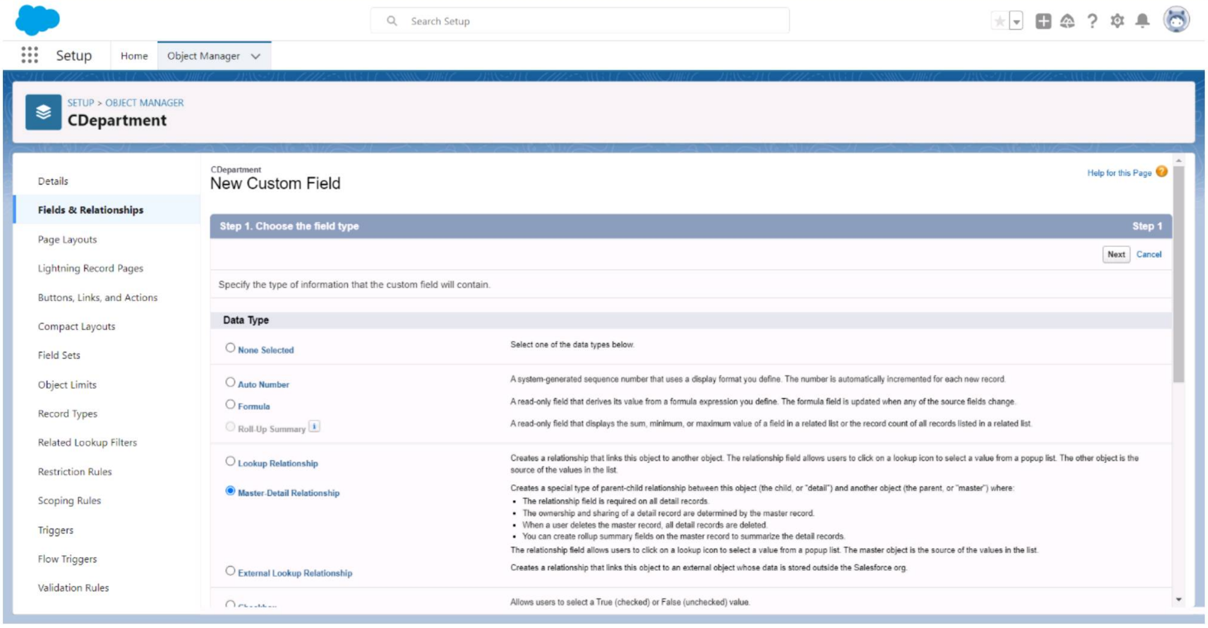
To create a Master-Detail relationship between these two custom objects, follow these steps:

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.







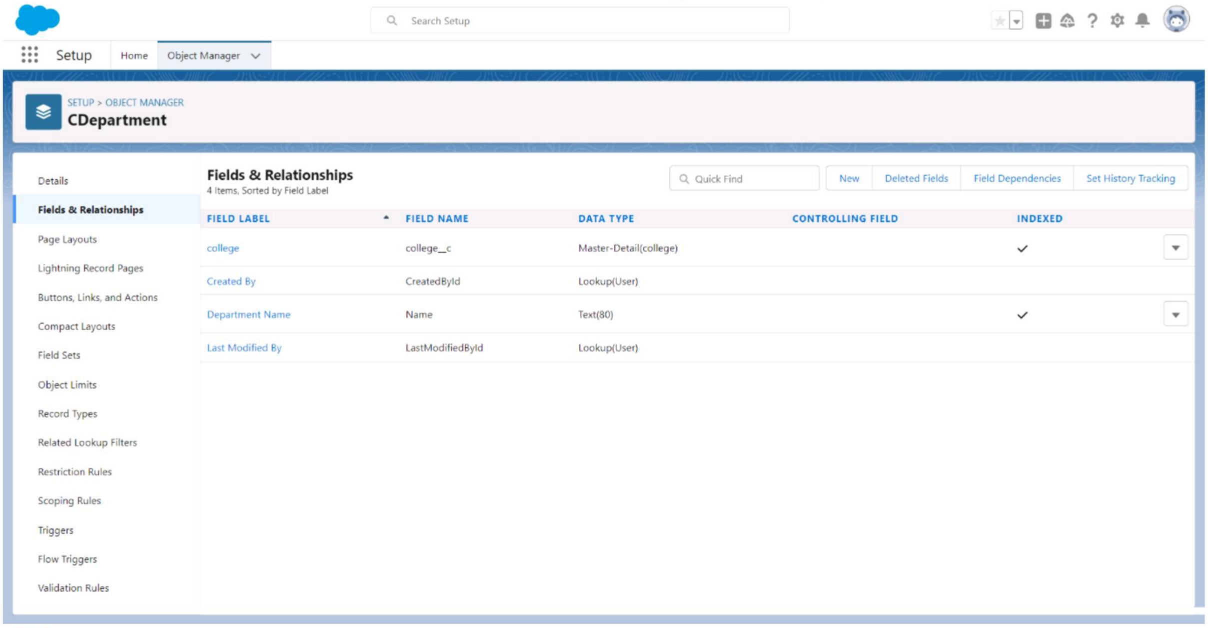


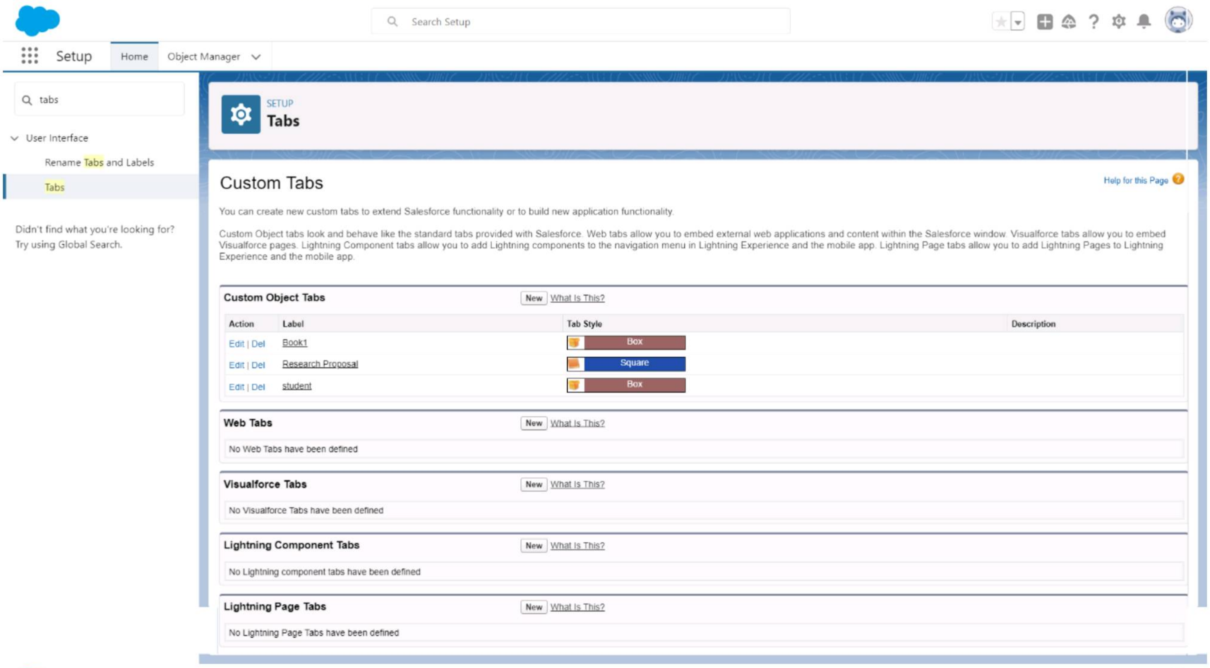
Step 3: Create the Roll-Up Summary Field

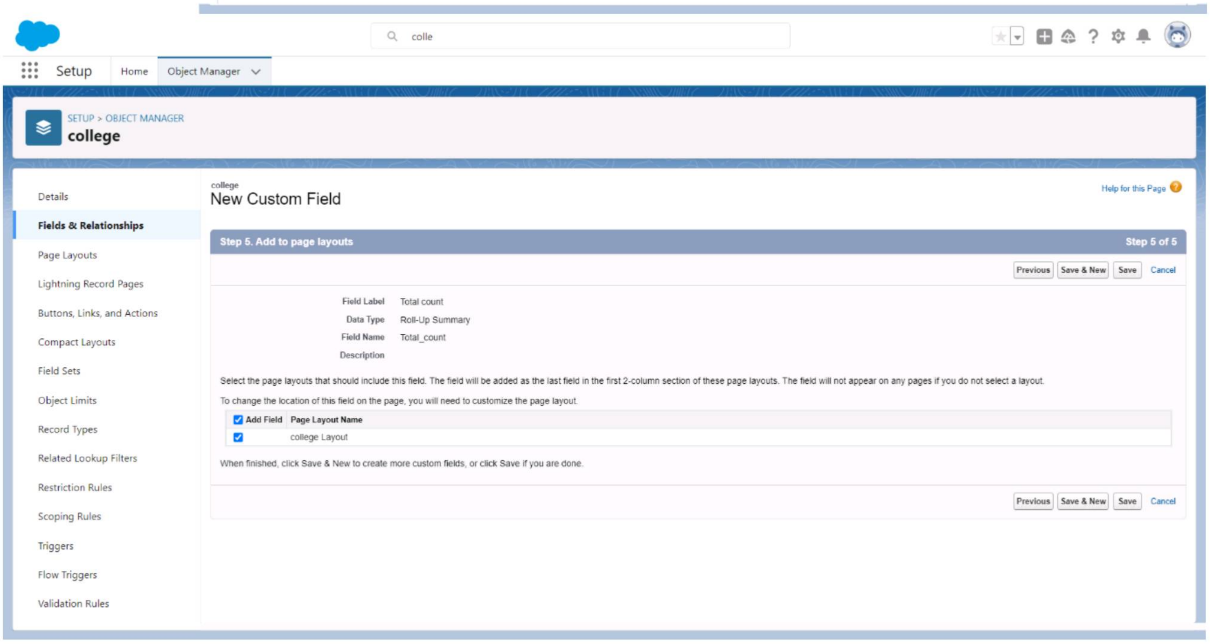
Now, let's create a Roll-Up Summary Field on the "College_C" to calculate the total number of related records in "Department__C":

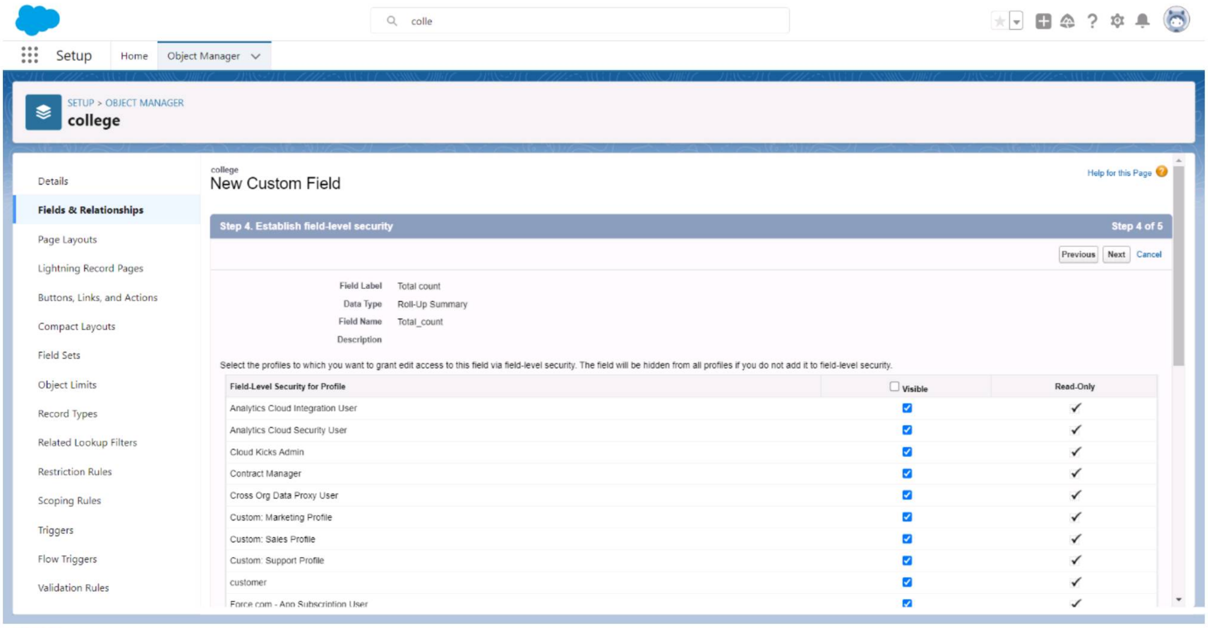
1. **Still on the "College__c" settings, go to "Fields & Relationships."**
2. **Click the "New" button to create a new custom field.**
3. **Choose "Roll-Up Summary" as the data type.**
4. **Enter a label for the field, e.g.,**
5. **Choose "Count" as the Roll-Up Type.**
6. **Select " Department__c" as 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.**

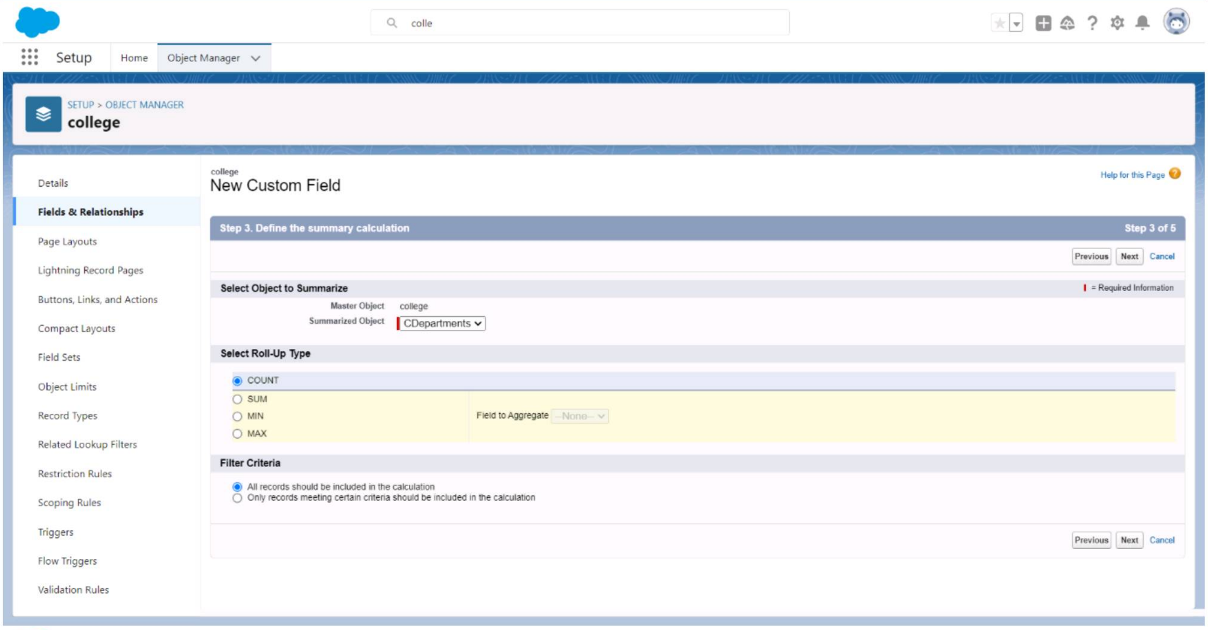
10. Click "Next" and "Save" to create the Roll-Up Summary Field.

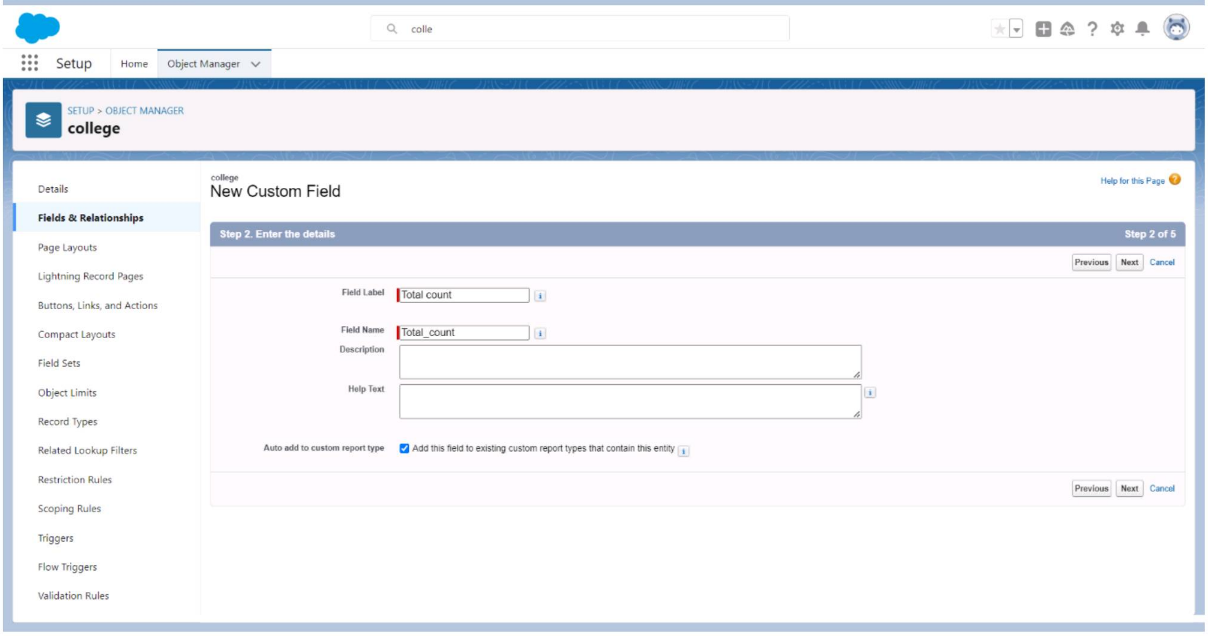


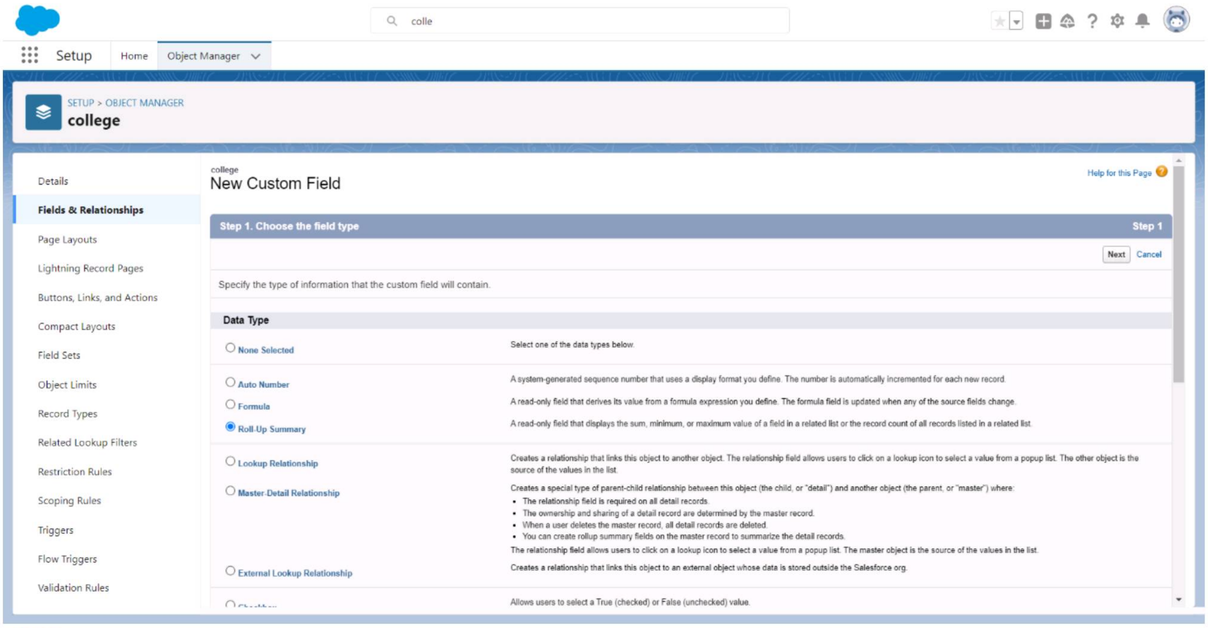


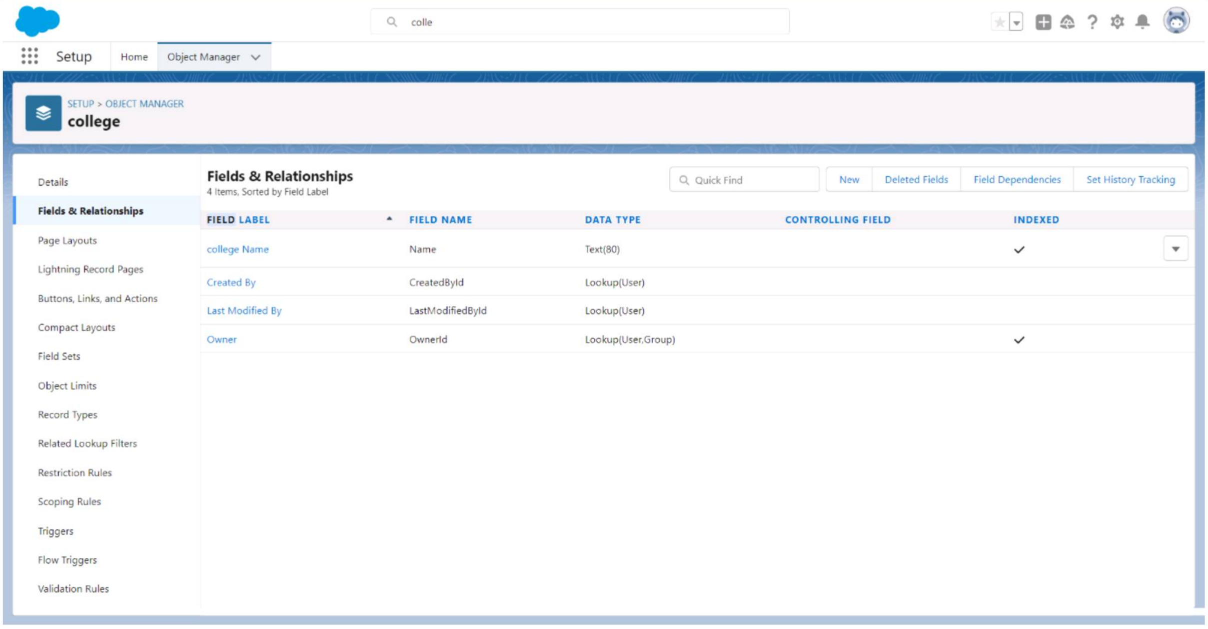



colle
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation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


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


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


colle
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Allows users to select a True (checked) or False (unchecked) value.

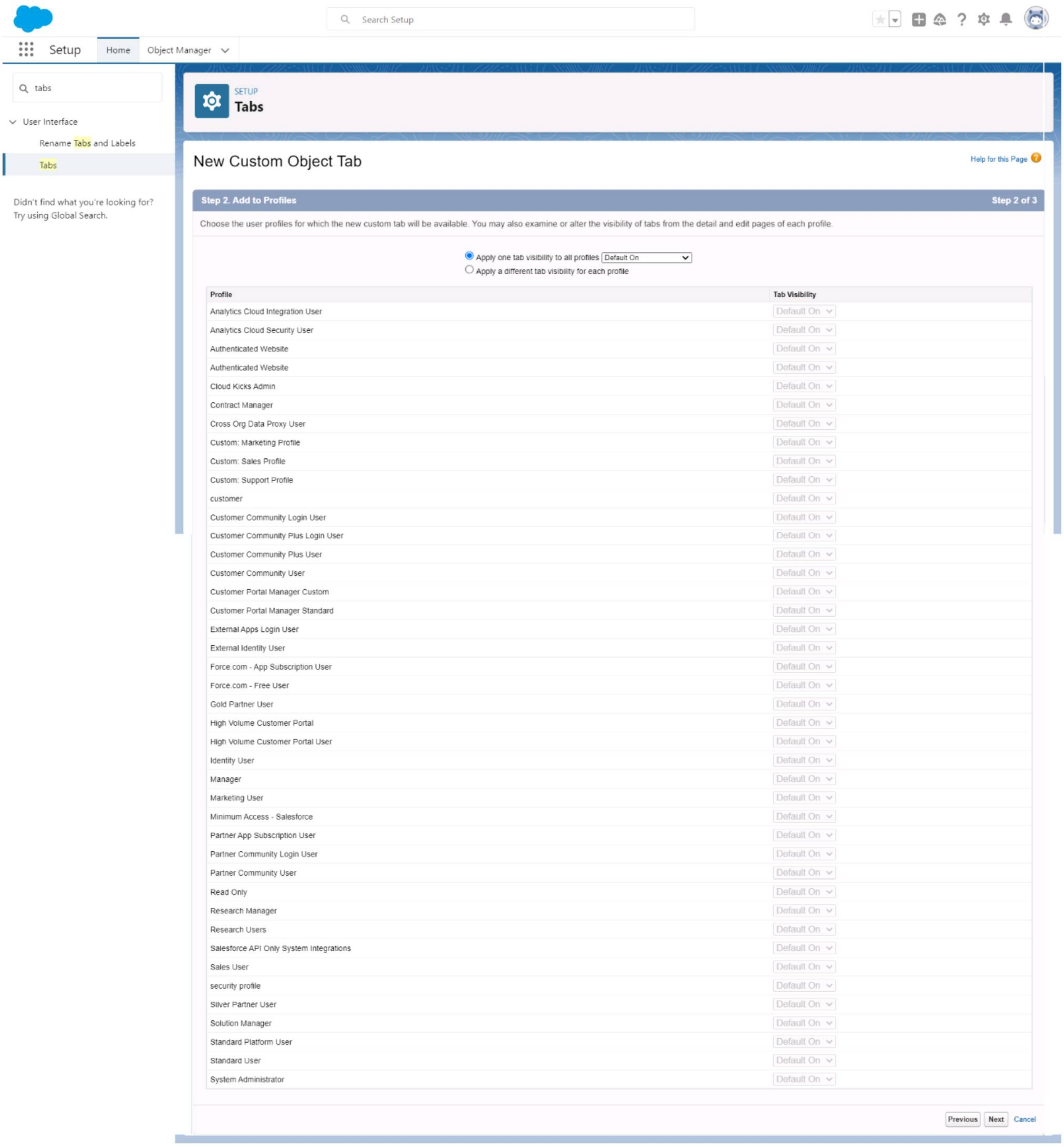

colle
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
Fields & Relationships
4 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
college Name
Name
Text(80)
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)

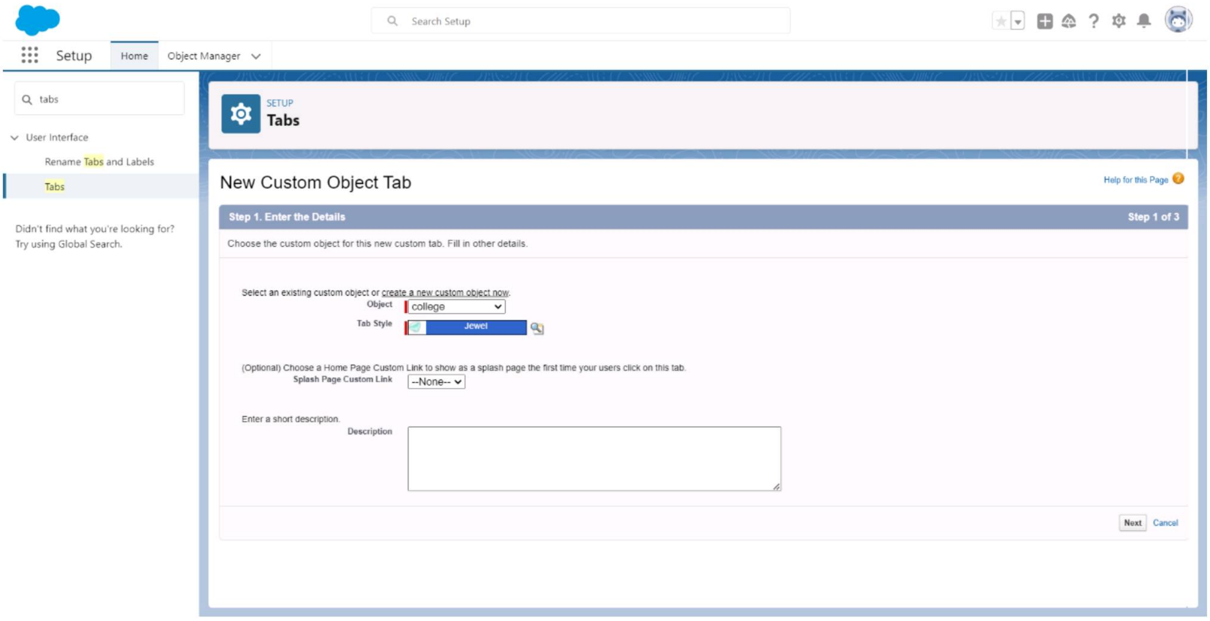
Step 4: Create a Lightning App

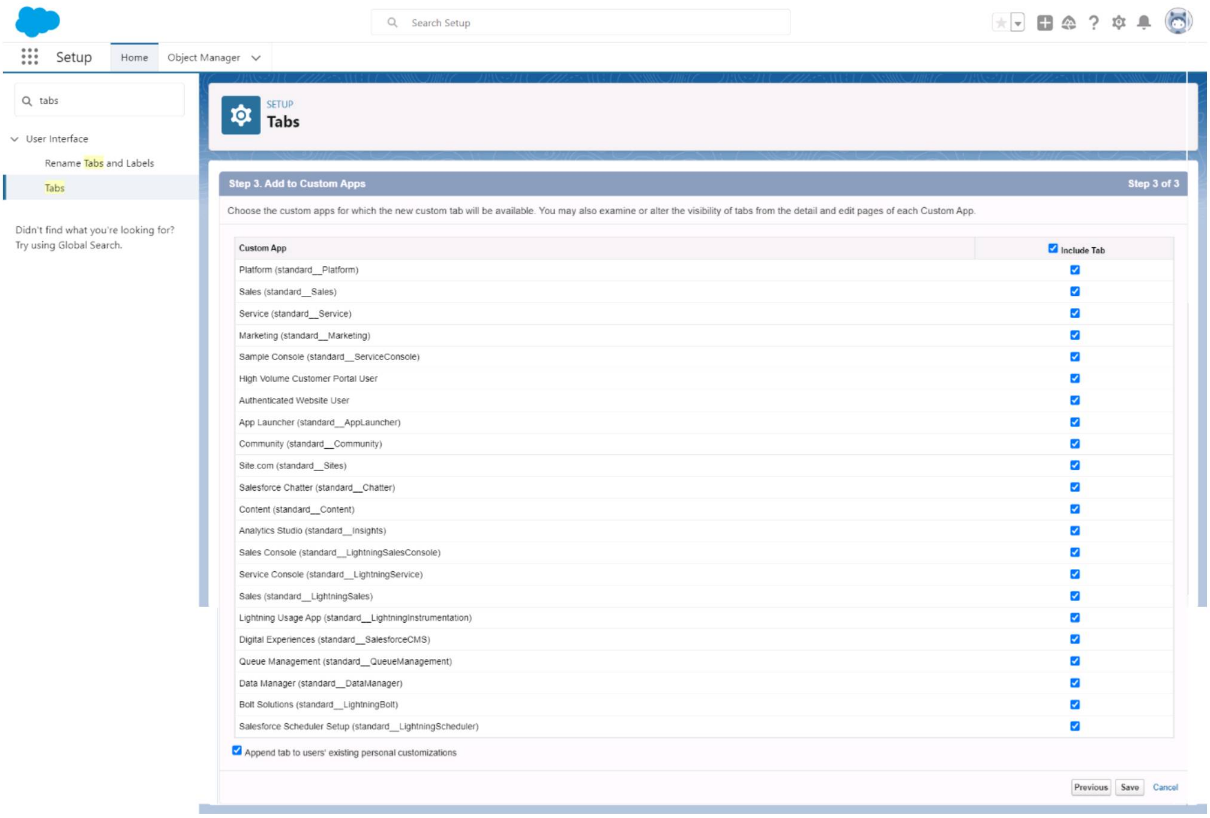
1. **Type and select "App Manager."**
2. **Click "New Lightning App."**
3. **Fill in basic information (Name, Developer Name, Description).**
4. **Choose the App Type (Standard, Console, Custom).**
5. **Customize the Logo and Colour Scheme.**
6. **Configure Navigation Items (objects to appear in the app's menu).**
7. **Set the App Visibility (default access).**
8. **Optionally, choose Record Pages (Lightning Record Pages).**
9. **Review and Save the app.**

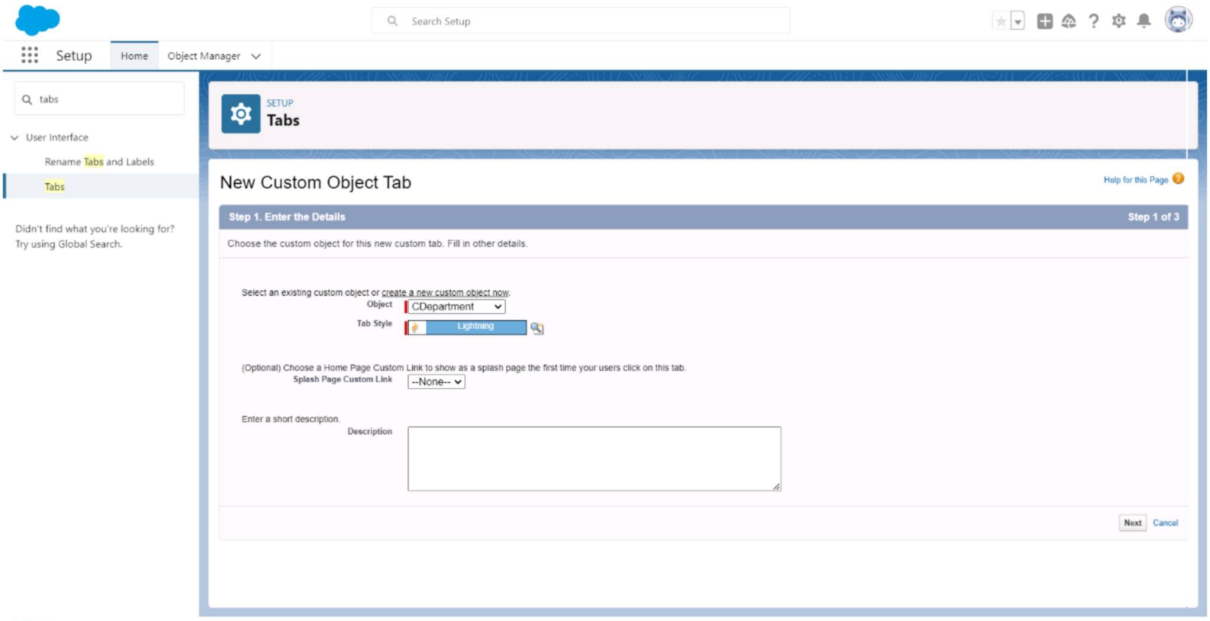
10. **Assign the app to users or profiles.**

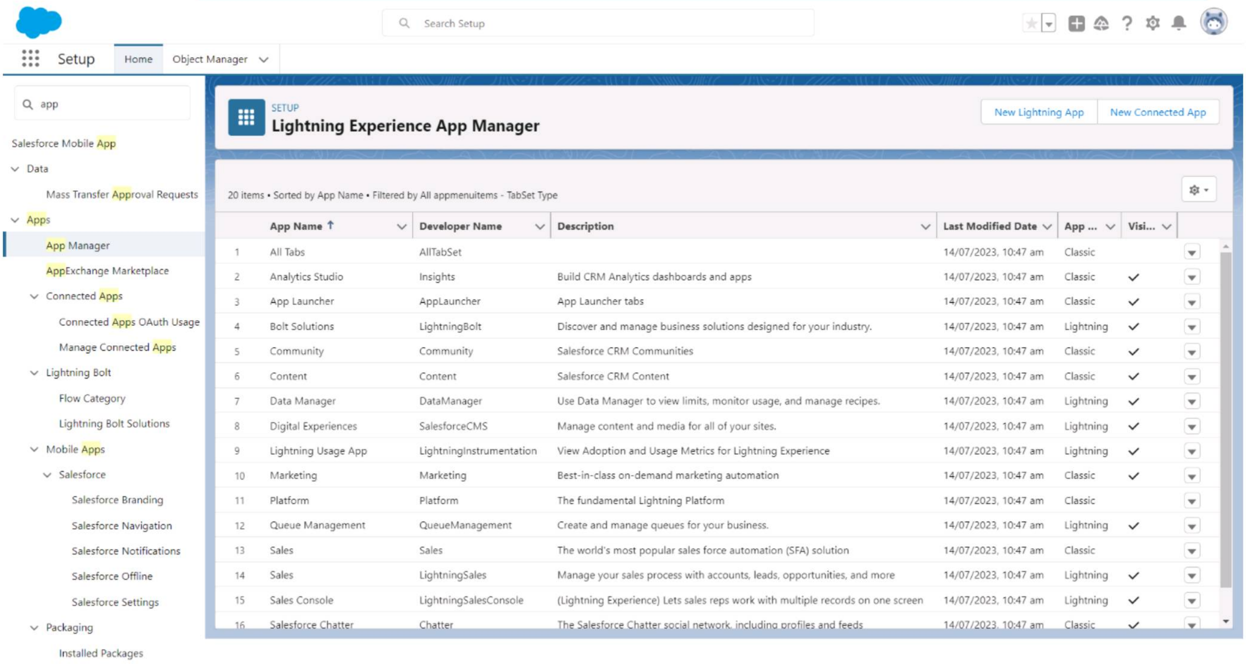
11. **Test the app with the assigned users.**

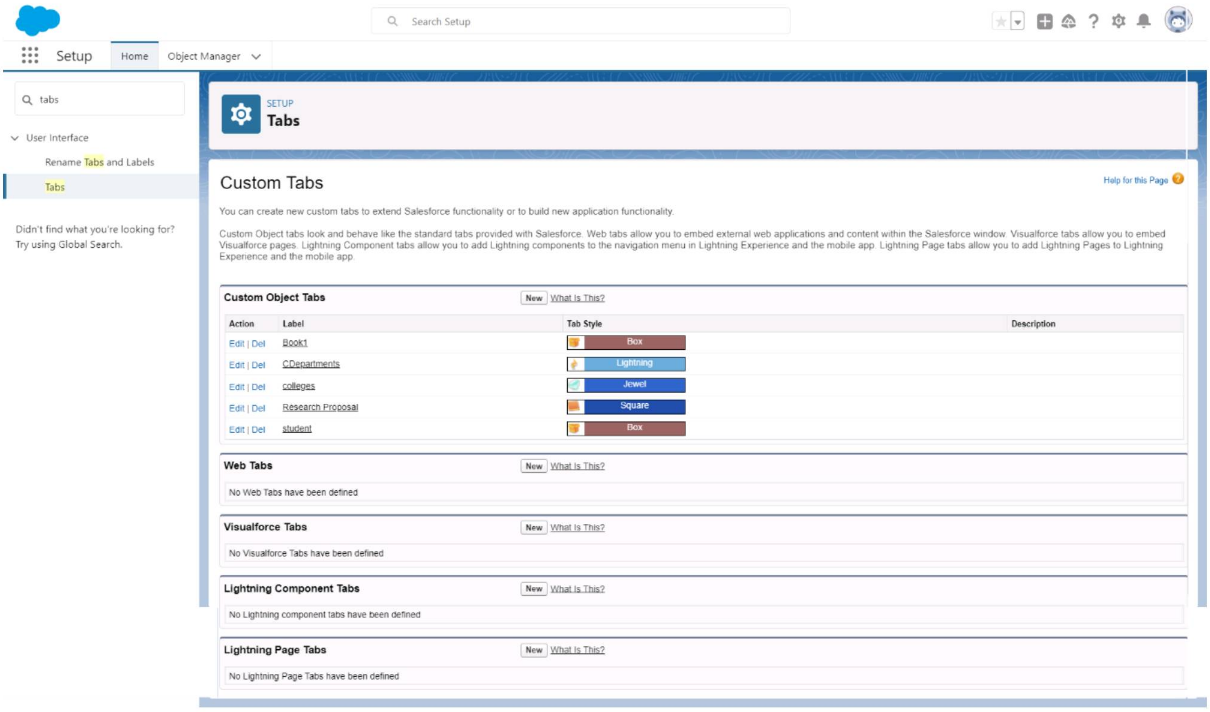


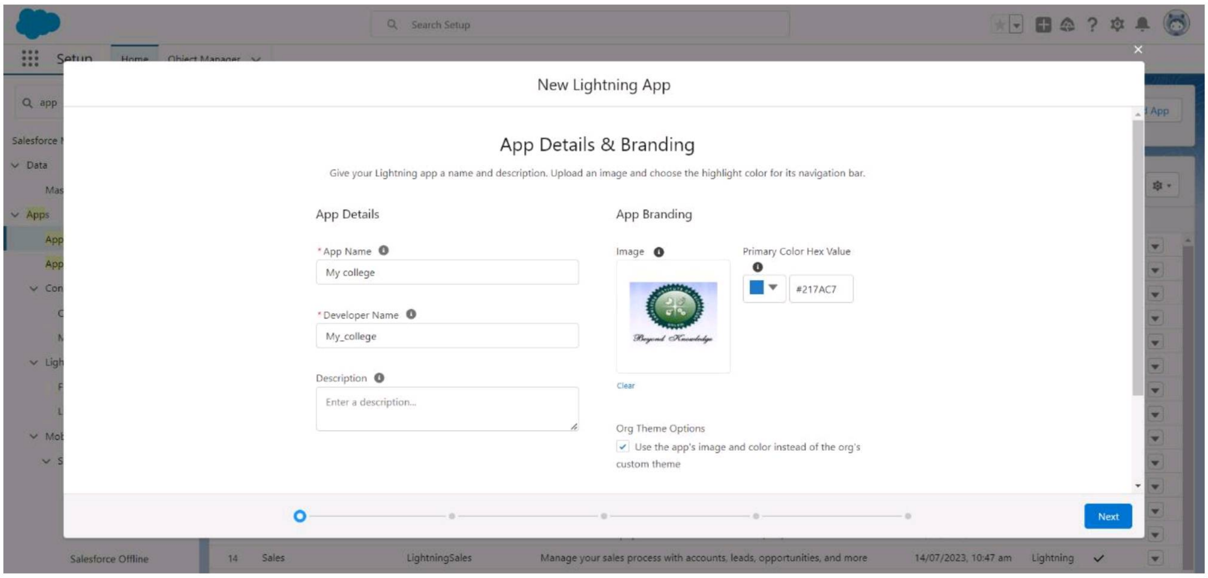

Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other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


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


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


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



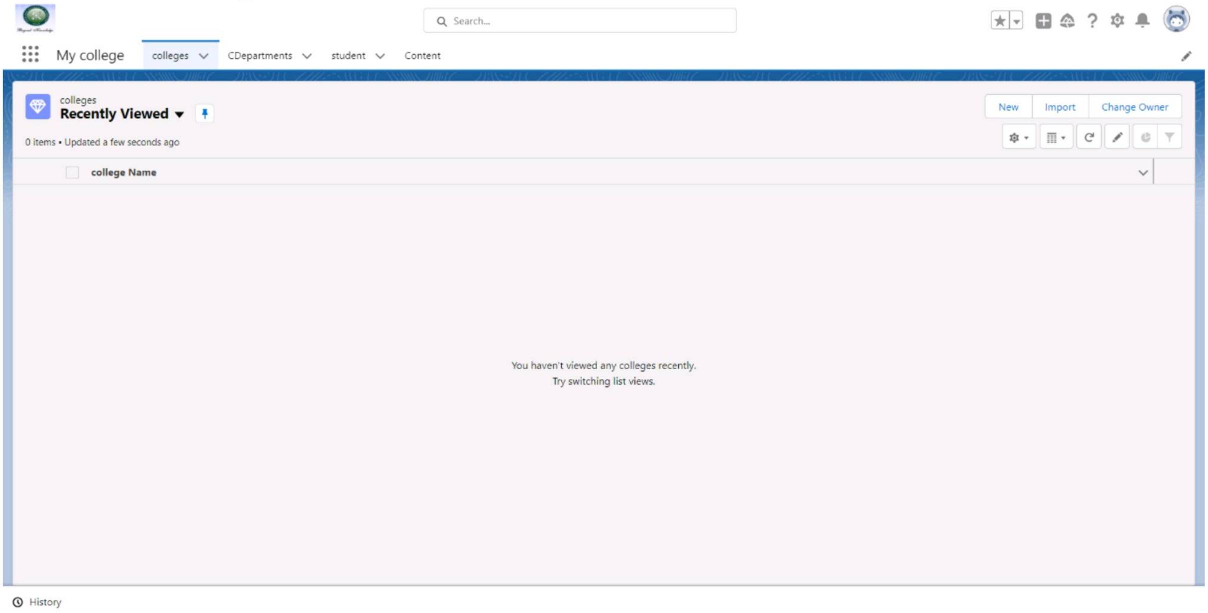


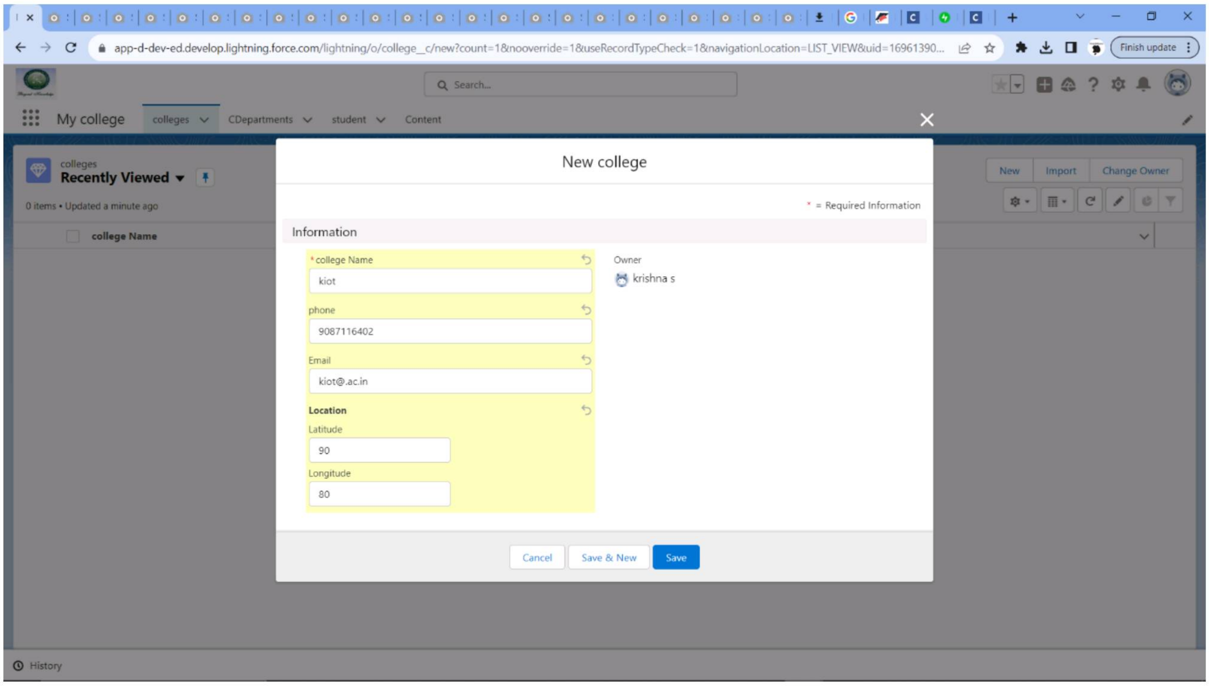
Conclusion:

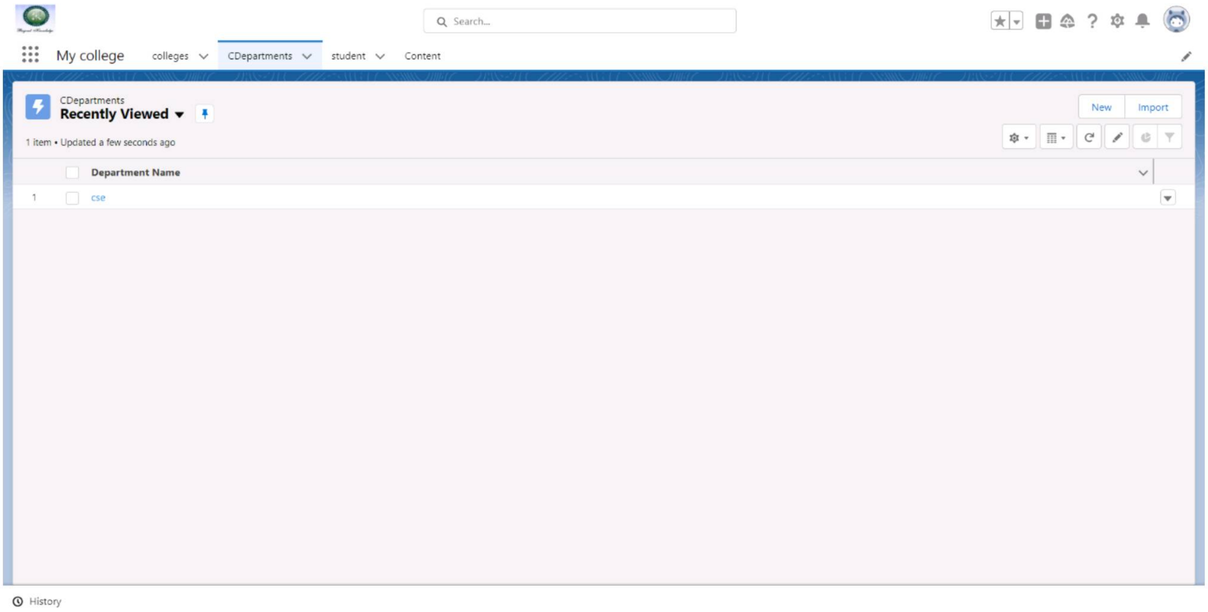
Now, whenever you create or update a record in the "Department__c" related to a "College__c," the "TotalCount__c" field on the "College__c" will automatically update to show the total number of related records.

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

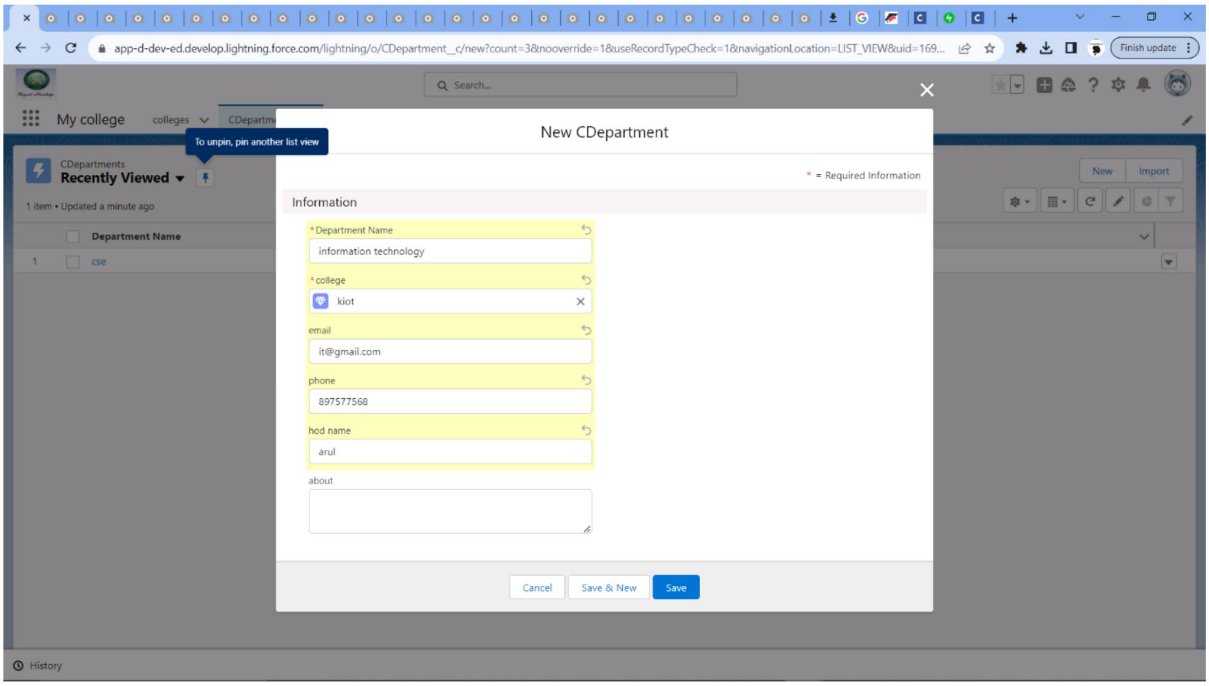
organization's requirements.



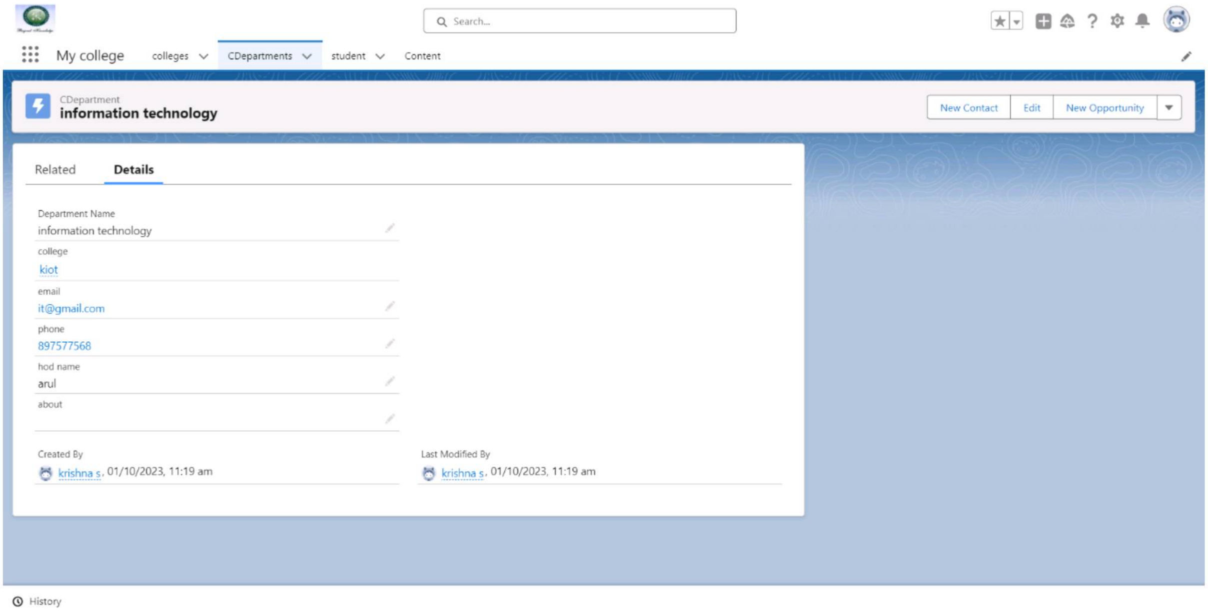


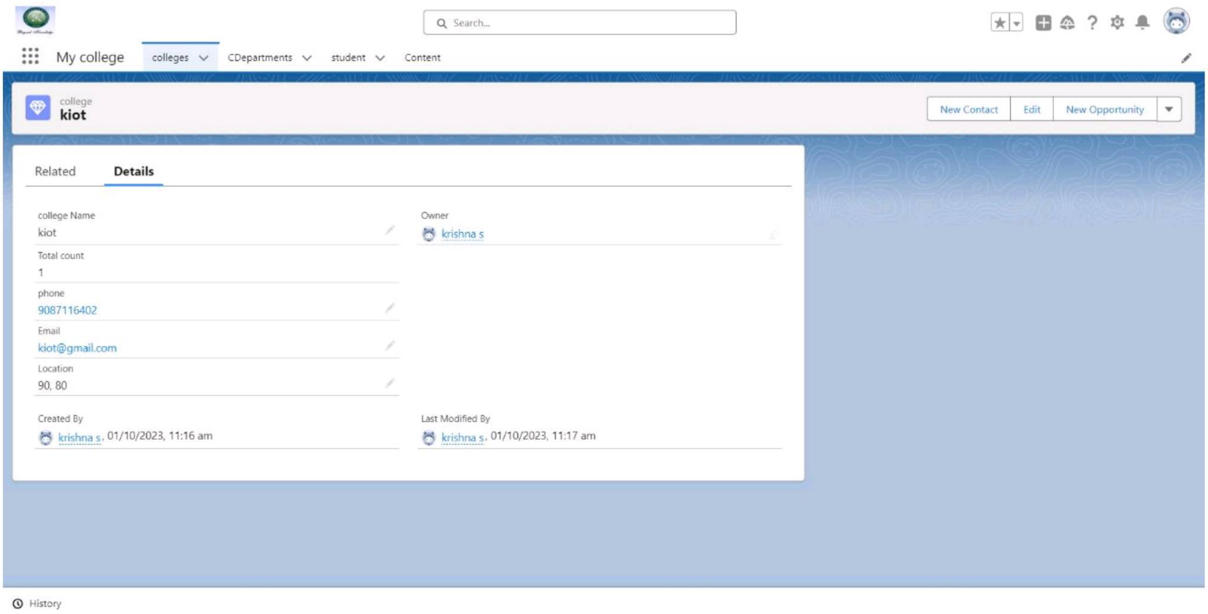


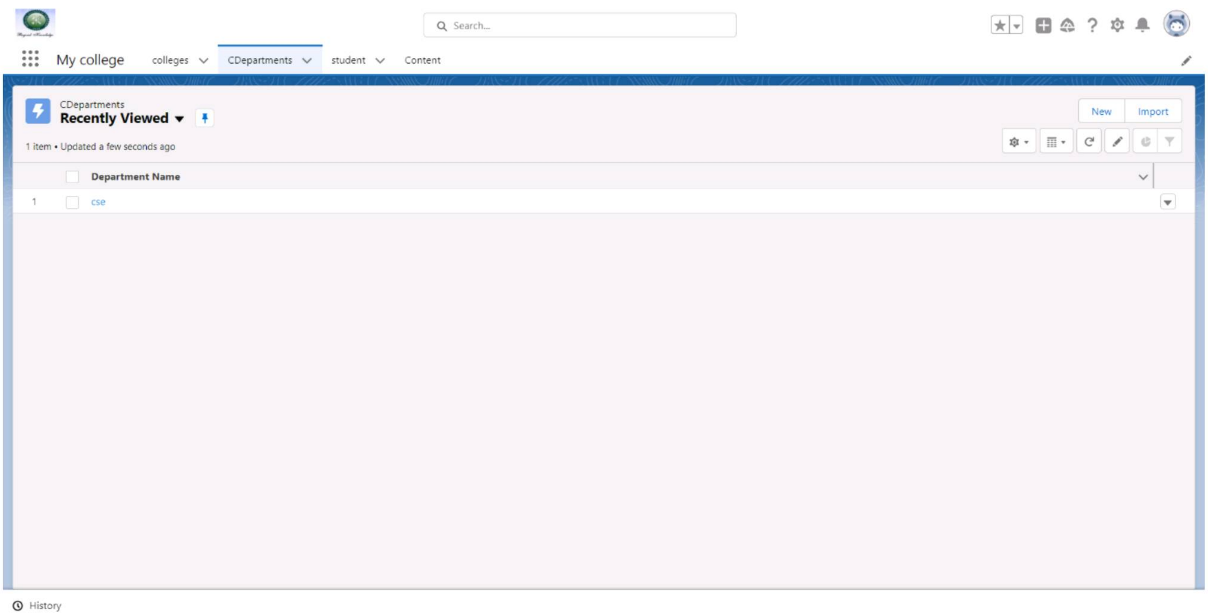
My college
colleges
CDepartments
student
Content
CDepartments
Recently Viewed
New
Import
1 item • Updated a few seconds ago
Department Name
1
cse
History

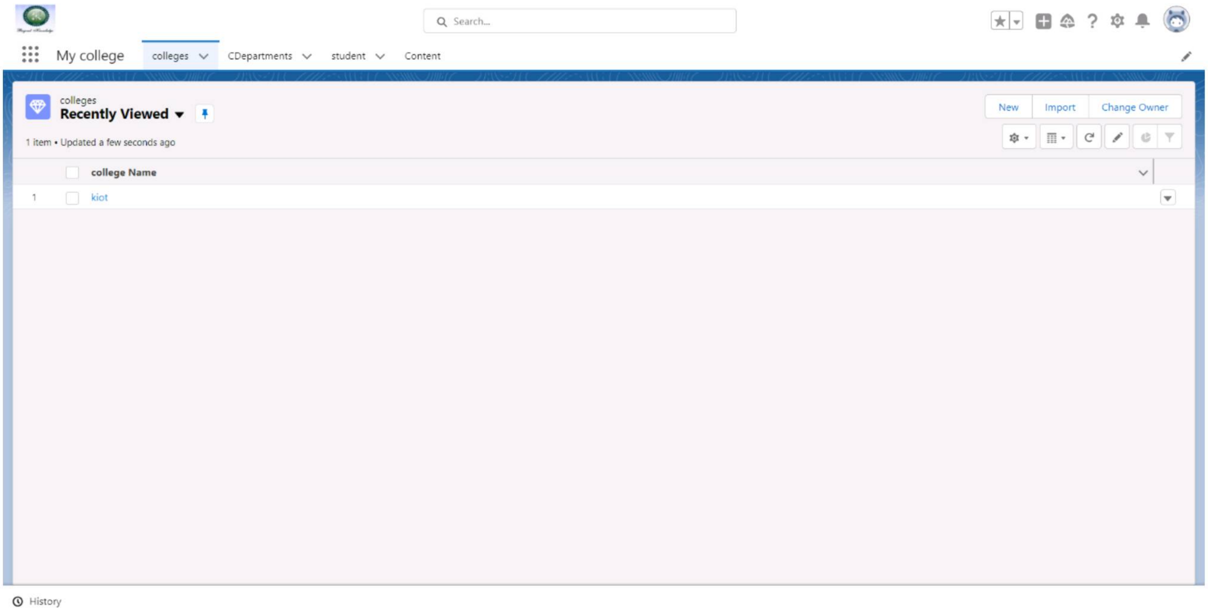


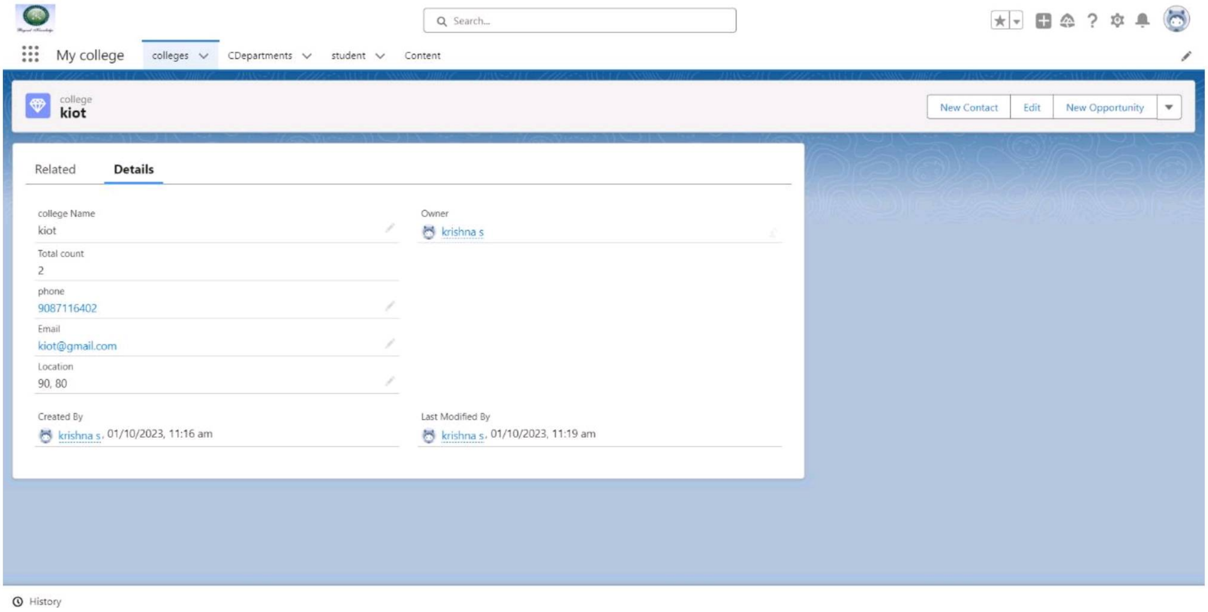
app-d-dev-ed.develop.lightning.force.com/lightning/o/CDepartment__c/new?count=3&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169...
Finish update
My college
To unpin, pin another list view
New CDepartment
* = Required Information
Information
*Department Name
information technology
*college
kiot
email
it@gmail.com
phone
897577568
hod name
arul
about
Cancel
Save & New
Save
History


Search...
My college
colleges
CDepartments
student
Content
CDepartment
information technology
New Contact
Edit
New Opportunity
Related
Details
Department Name
information technology
college
kiot
email
it@gmail.com
phone
897577568
hod name
arul
about
Created By
krishna s, 01/10/2023, 11:19 am
Last Modified By
krishna s, 01/10/2023, 11:19 am
History


Search...
My college
colleges
CDepartments
student
Content
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


Search...
My college
colleges
CDepartments
student
Content
CDepartments
Recently Viewed
New
Import
1 item • Updated a few seconds ago
Department Name
1
cse
History

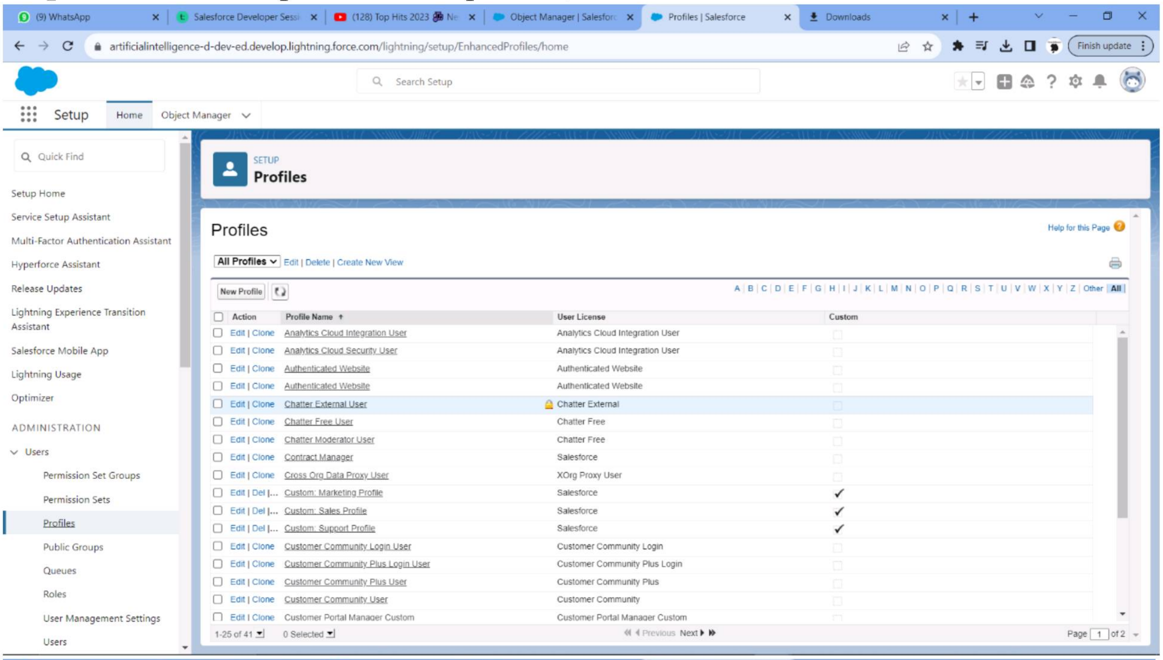

Search...
My college
colleges
CDepartments
student
Content
colleges
Recently Viewed
New
Import
Change Owner
1 item • Updated a few seconds ago
college Name
1
kiot
History

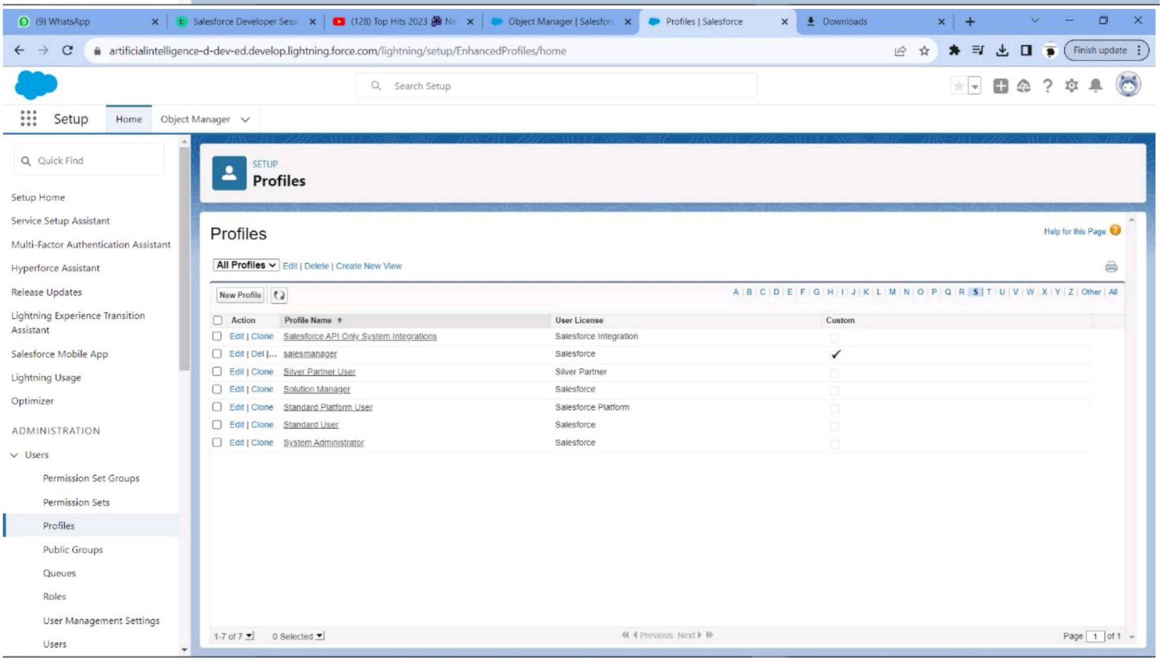

Search...
My college
colleges
CDepartments
student
Content
college
kiot
New Contact
Edit
New Opportunity
Related
Details
college Name
kiot
Owner
krishna s
Total count
2
phone
9087116402
Email
kiot@gmail.com
Location
90, 80
Created By
krishna s, 01/10/2023, 11:16 am
Last Modified By
krishna s, 01/10/2023,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

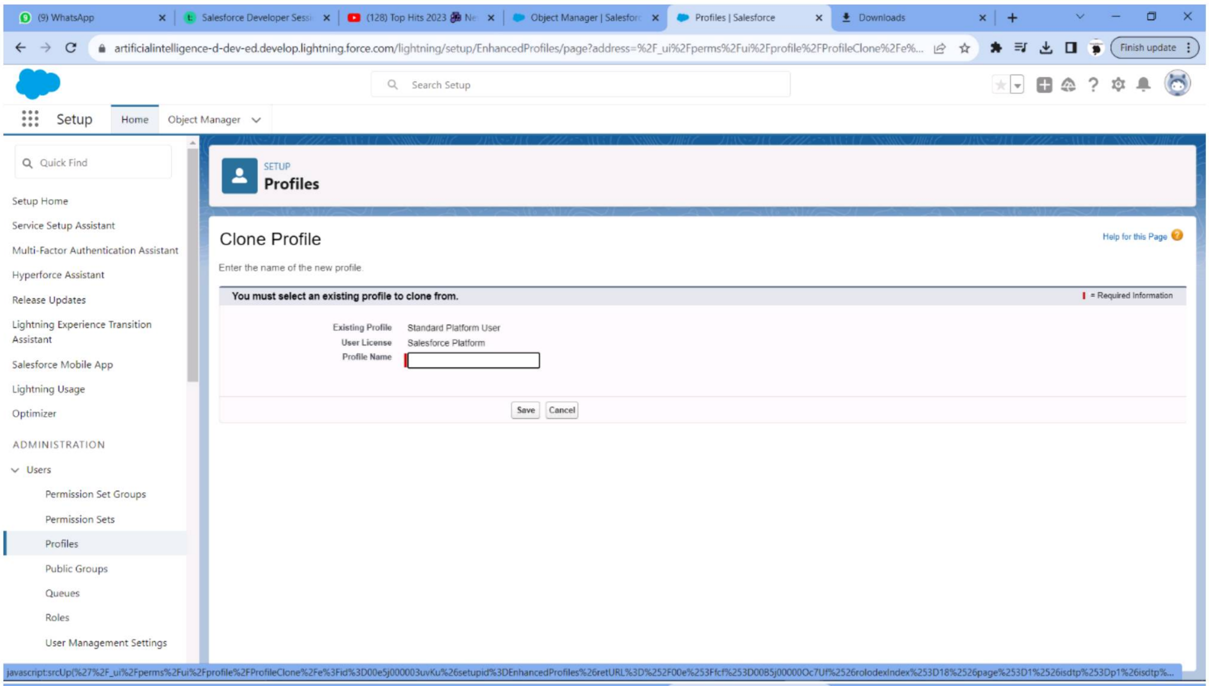
2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

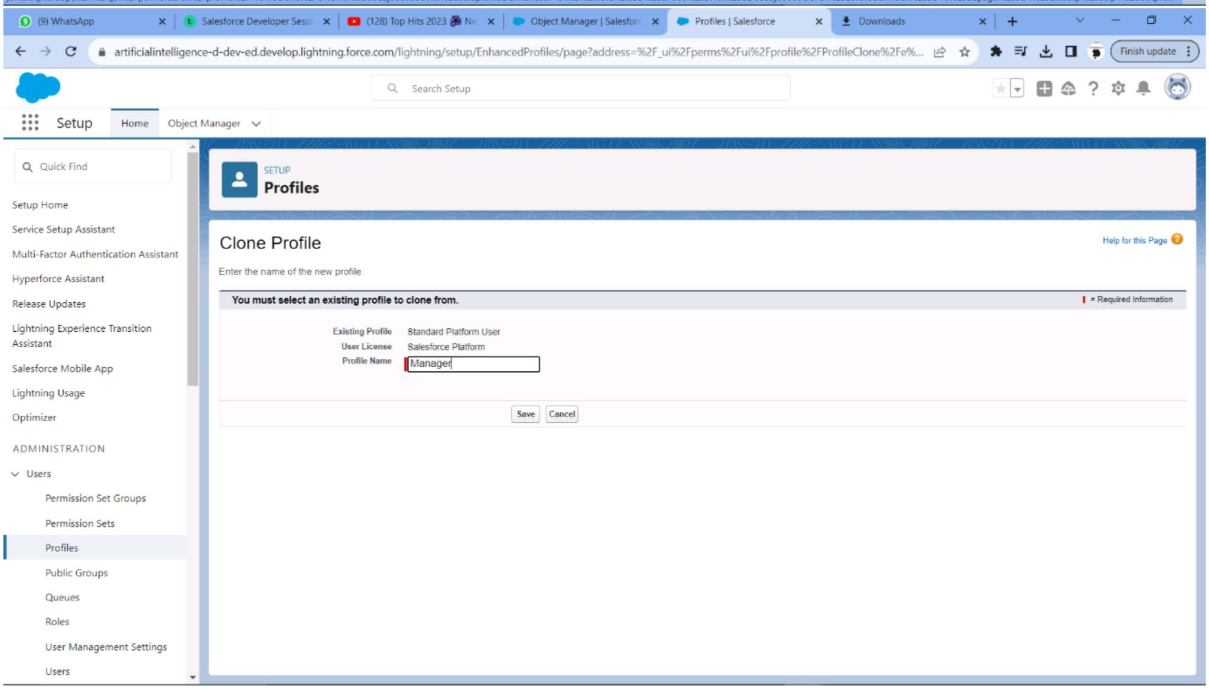
Solution:

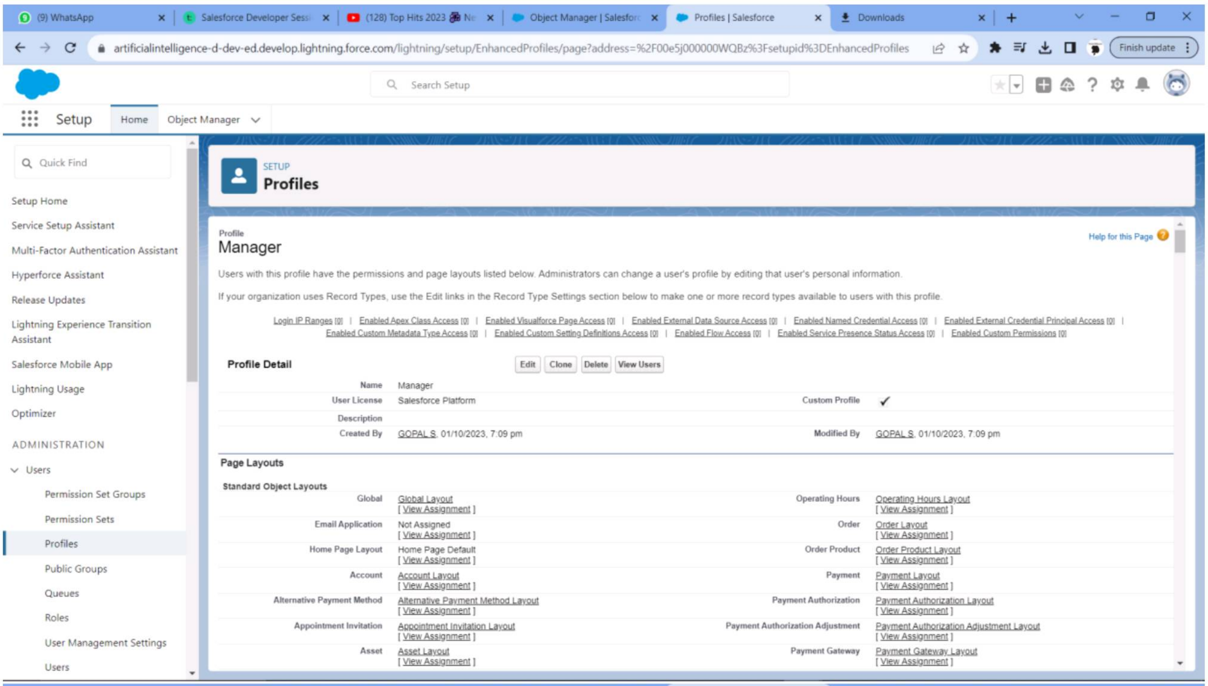
Step 1: Create two separate custom profiles, one for User A and one for User B.

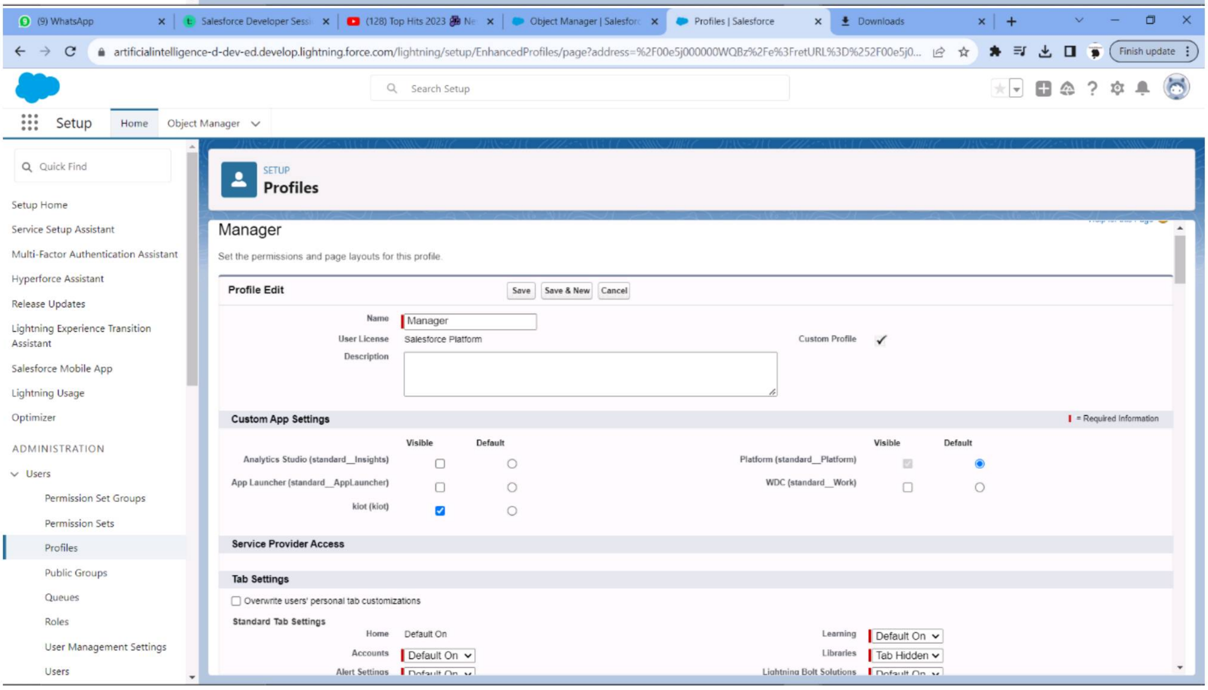


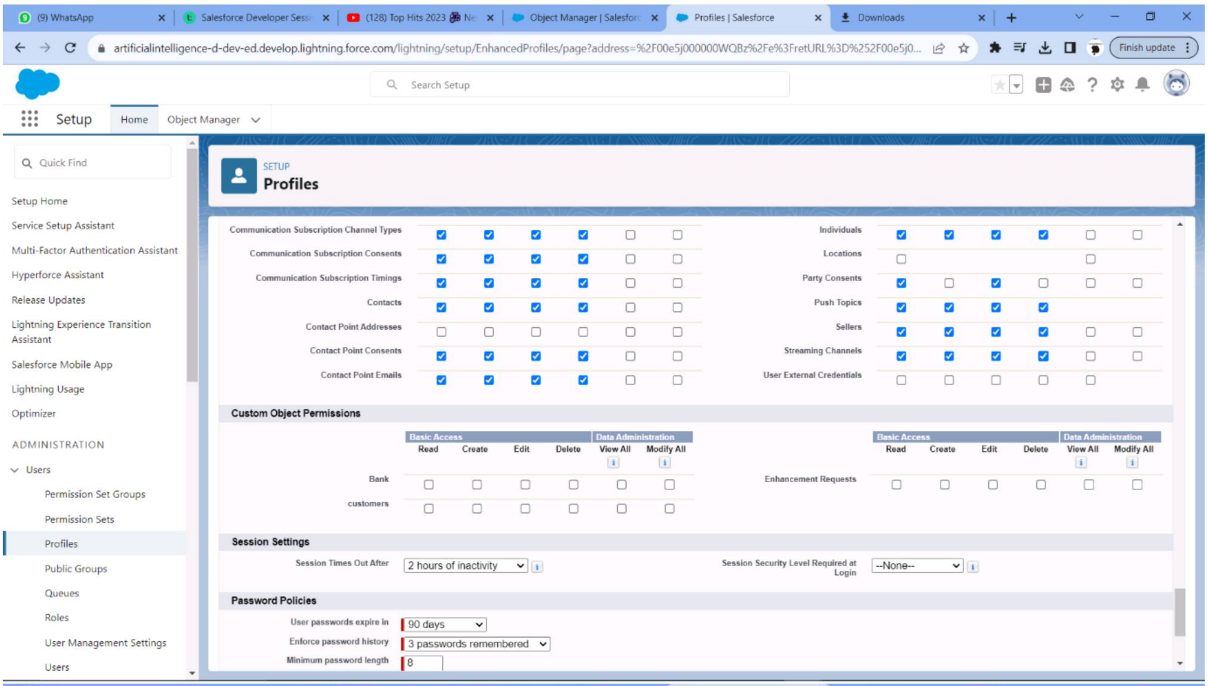



Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile Standard Platform User
User License Salesforce Platform
Profile Name
Save
Cancel

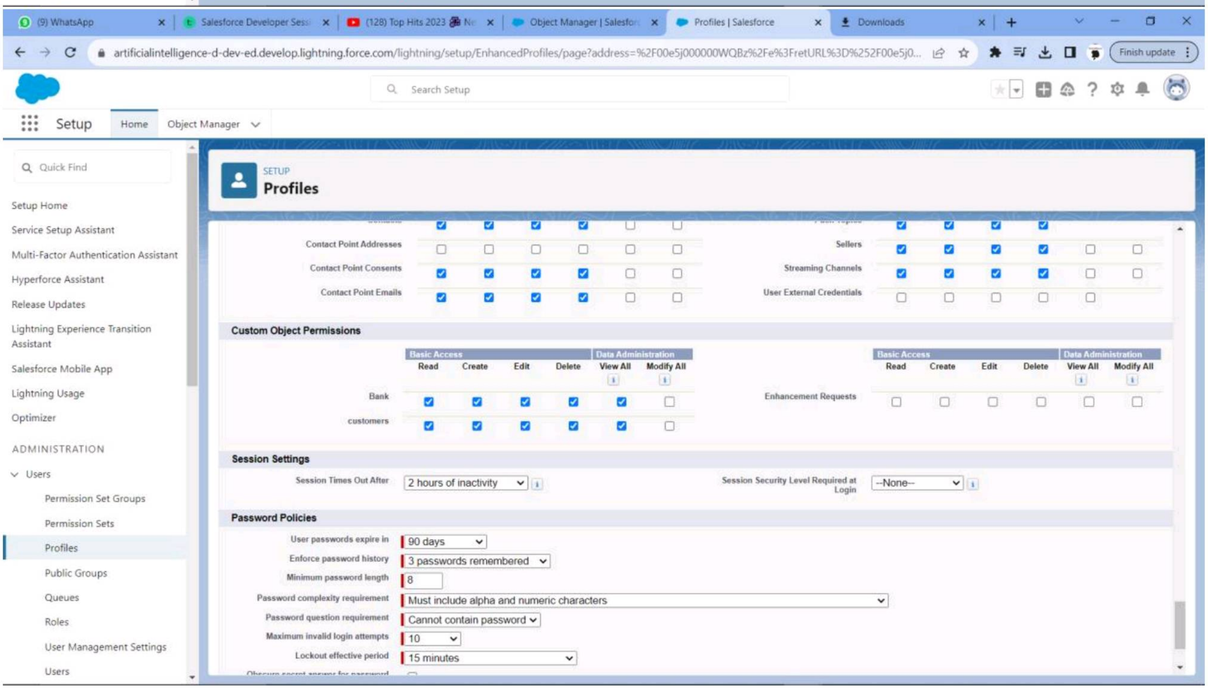

Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile Standard Platform User
User License Salesforce Platform
Profile Name Manager
Save
Cancel


SETUP
Profiles
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
Edit
Clone
Delete
View Users
Name Manager
User License Salesforce Platform
Custom Profile
Description
Created By GOPAL S, 01/10/2023, 7:09 pm
Modified By GOPAL S, 01/10/2023, 7:09 pm
Page Layouts
Standard Object Layouts
Global Global Layout [View Assignment]
Operating Hours Operating Hours Layout [View Assignment]
Email Application Not Assigned [View Assignment]
Order Order Layout [View Assignment]
Home Page Layout Home Page Default [View Assignment]
Order Product Order Product Layout [View Assignment]
Account Account Layout [View Assignment]
Payment Payment Layout [View Assignment]
Alternative Payment Method Alternative Payment Method Layout [View Assignment]
Payment Authorization Payment Authorization Layout [View Assignment]
Appointment Invitation Appointment Invitation Layout [View Assignment]
Payment Authorization Adjustment Payment Authorization Adjustment Layout [View Assignment]
Asset Asset Layout [View Assignment]
Payment Gateway Payment Gateway Layout [View Assignment]

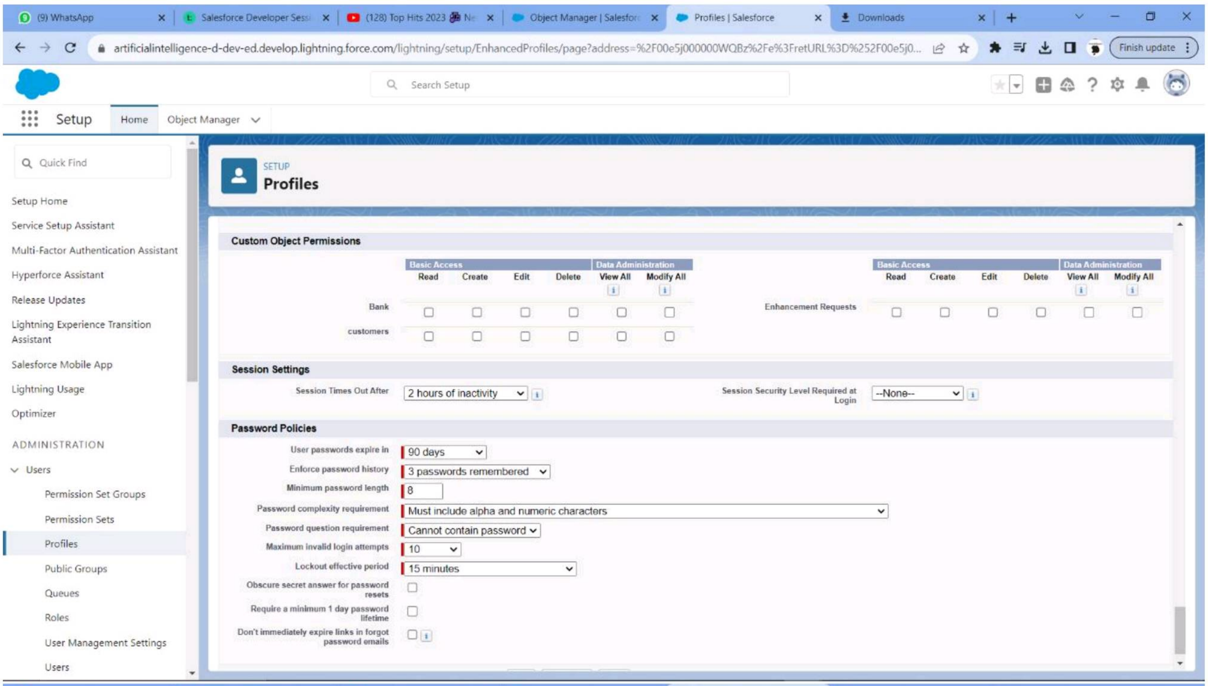

SETUP
Profiles
Manager
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name Manager
User License Salesforce Platform
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
kiot (kiot)
Platform (standard__Platform)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Home Default On
Accounts Default On
Learning Default On
Libraries Tab Hidden

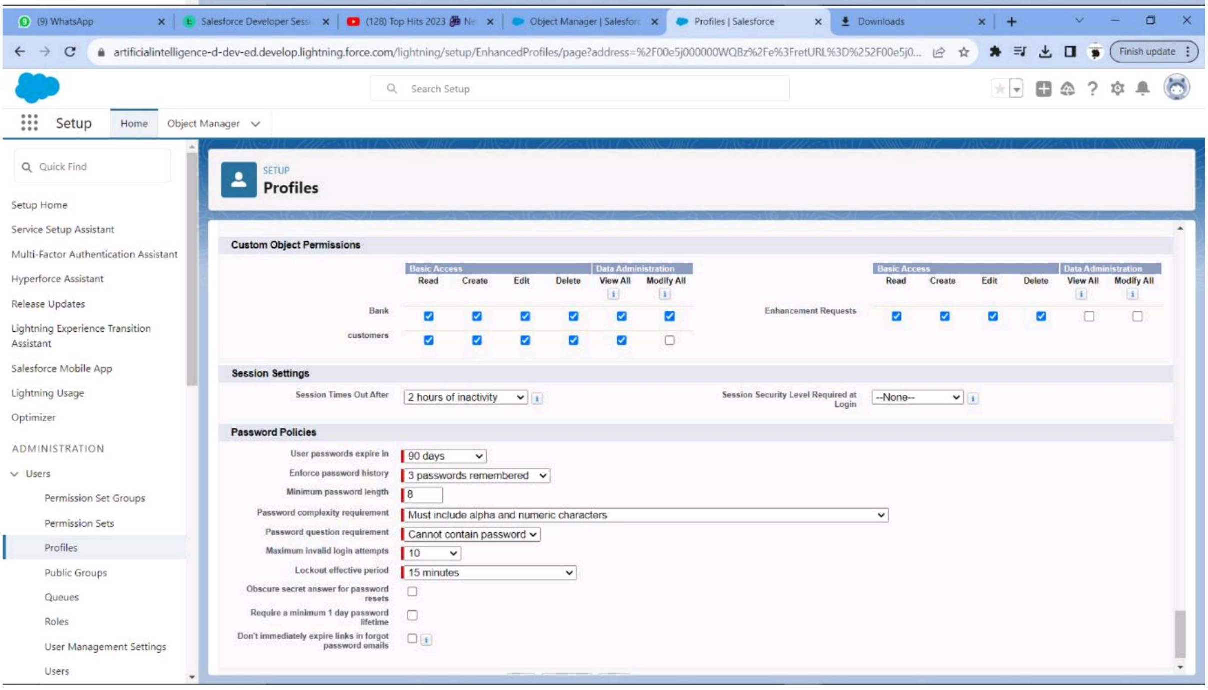


Setup
Home
Object Manager
SETUP
Profiles
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Communication Subscription Channel Types
Communication Subscription Consents
Communication Subscription Timings
Contacts
Contact Point Addresses
Contact Point Consents
Contact Point Emails
Individuals
Locations
Party Consents
Push Topics
Sellers
Streaming Channels
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8



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


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2Fe%3FretURL%3D%252F00e5j0...
Setup
Home
Object Manager
SETUP
Profiles
Custom Object Permissions
Basic Access
Read
Create
Edit
Delete
Data Administration
View All
Modify All
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
Maximum invalid login attempts
10
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails
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


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2Fe%3FretURL%3D%252F00e5j0...
Setup
Home
Object Manager
SETUP
Profiles
Custom Object Permissions
Basic Access
Read
Create
Edit
Delete
Data Administration
View All
Modify All
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
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15 minutes
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Service Setup Assistant
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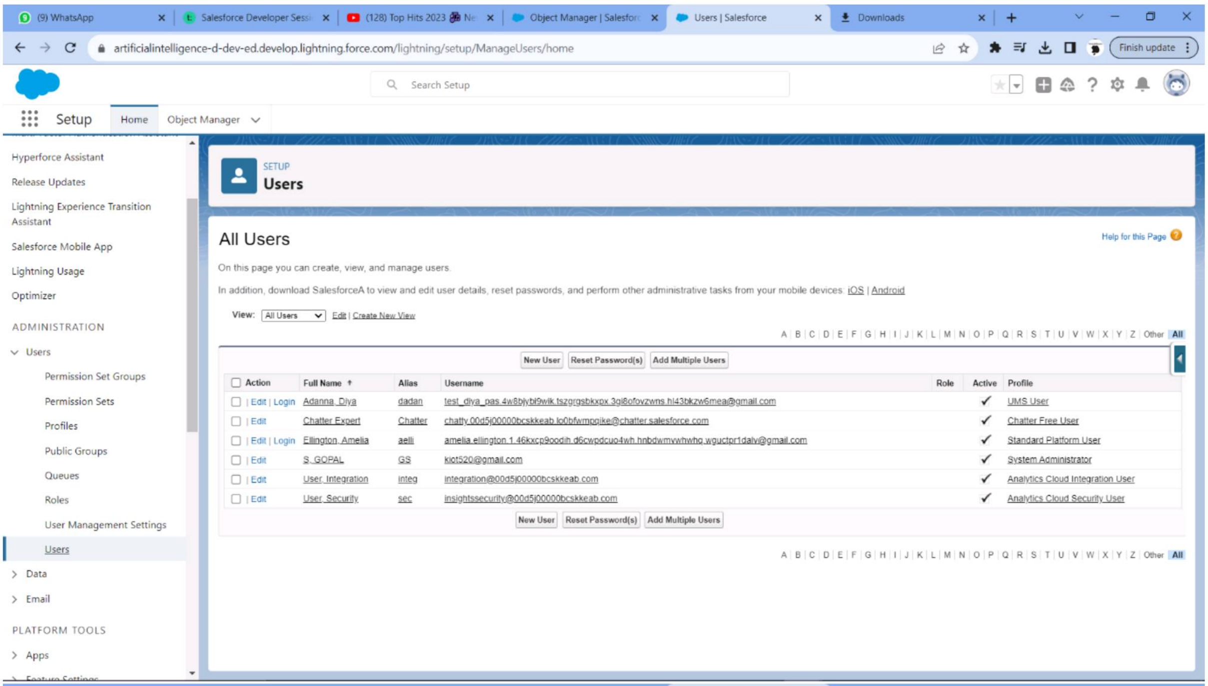
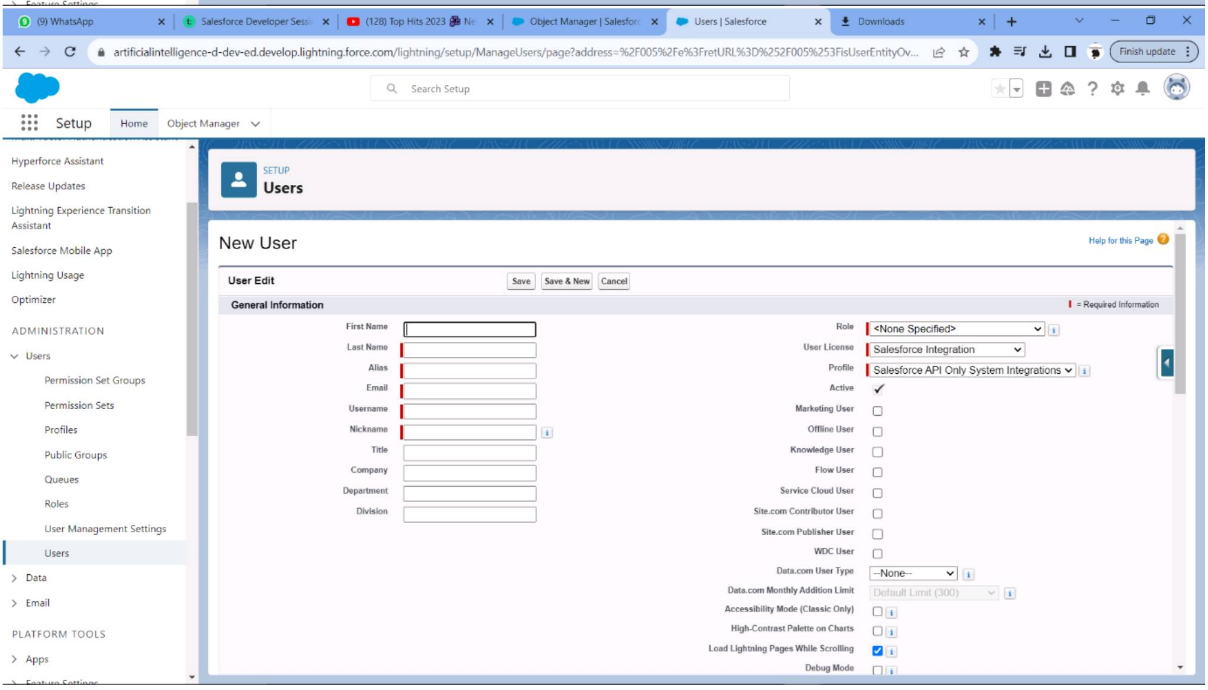
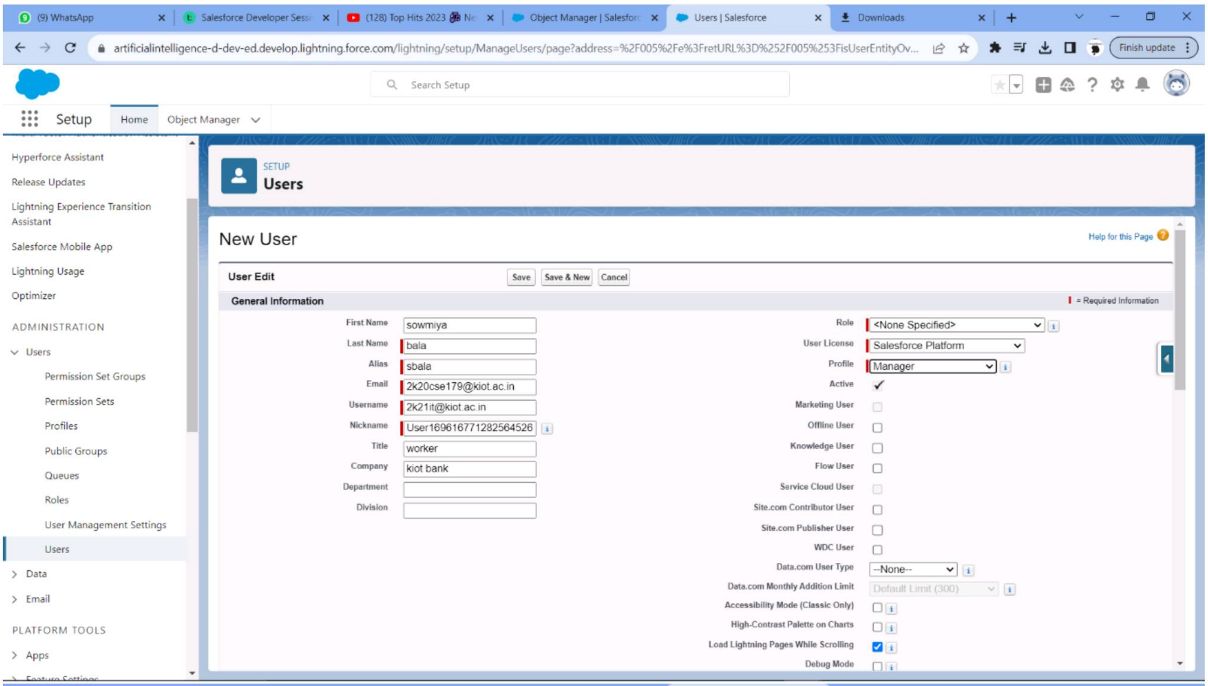
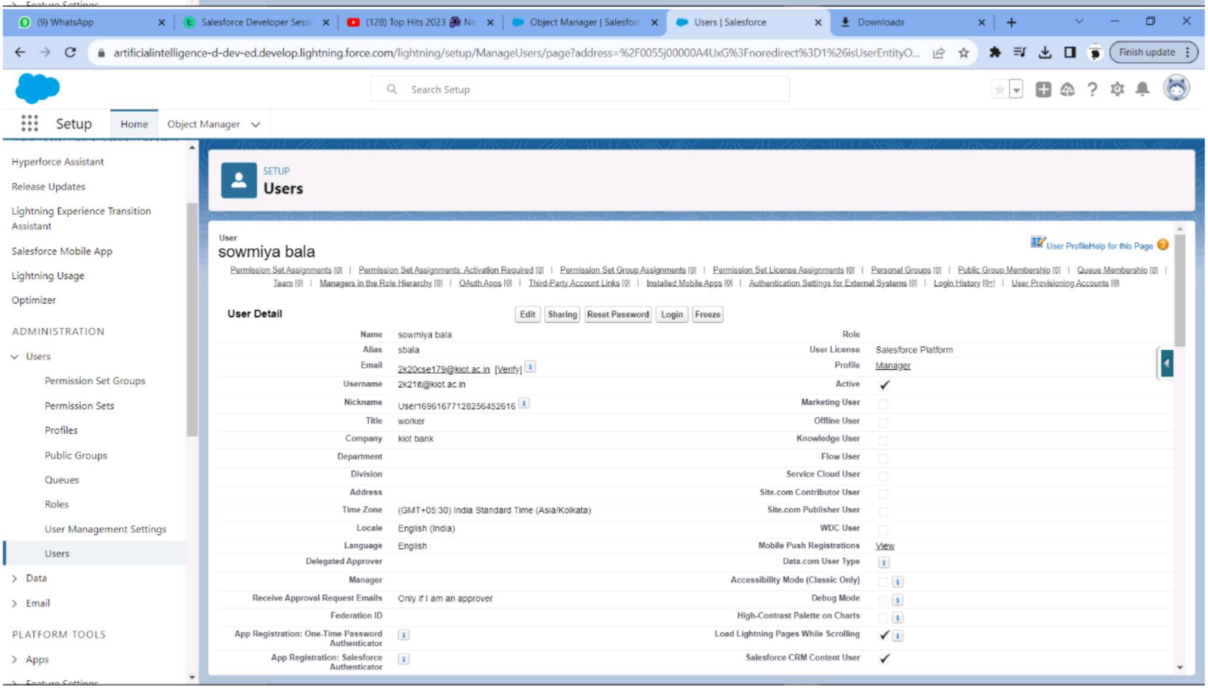
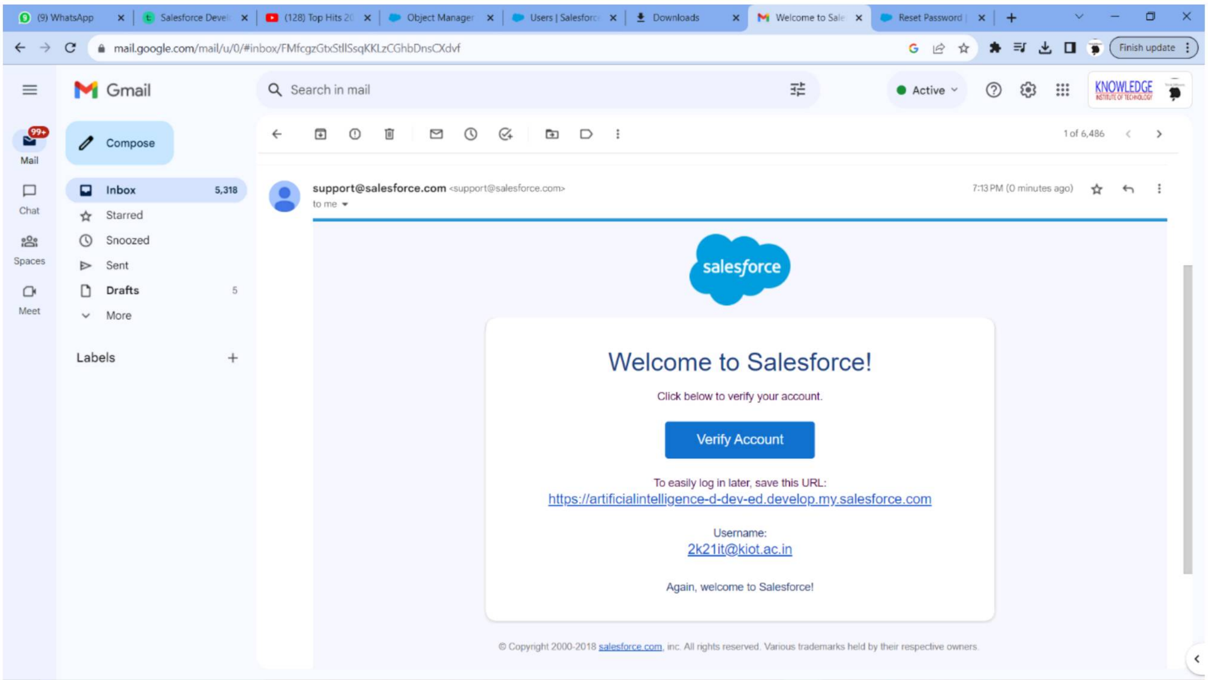
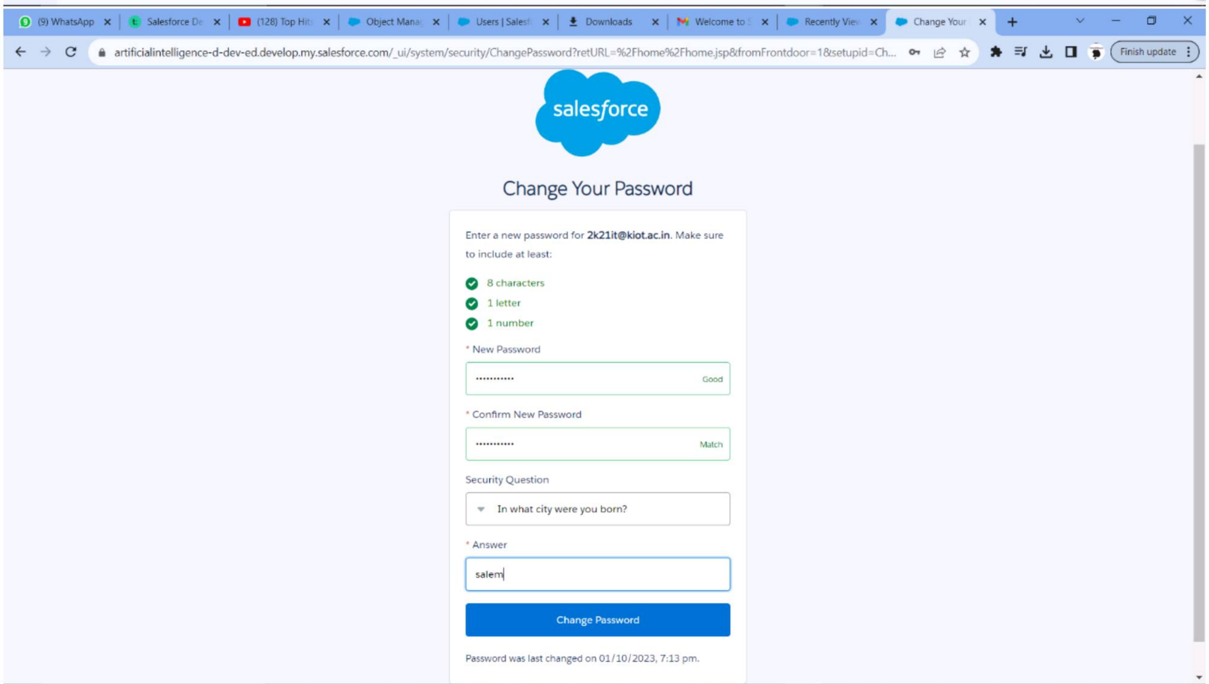
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users

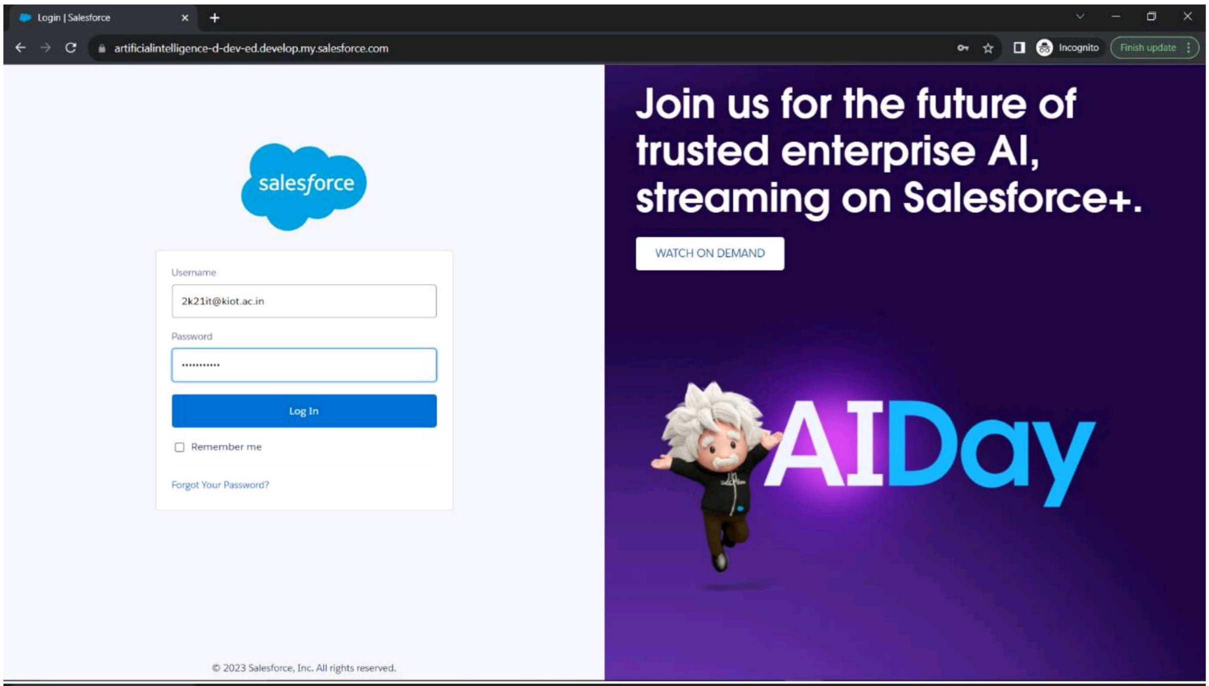

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
Setup
Home
Object Manager
SETUP
Users
All Users
On this page you can create, view, and manage users.
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android
View: All Users
Edit | Create New View
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile
Adanna, Diya
Chatter Expert
Ellington, Amelia
S, GOPAL
User, Integration
User, Security
UMS User
Chatter Free User
Standard Platform User
System Administrator
Analytics Cloud Integration User
Analytics Cloud Security User
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Apps

Setup
Home
Object Manager
SETUP
Users
New User
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division
Role
<None Specified>
User License
Salesforce Integration
Profile
Salesforce API Only System Integrations
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Default Limit (300)
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode

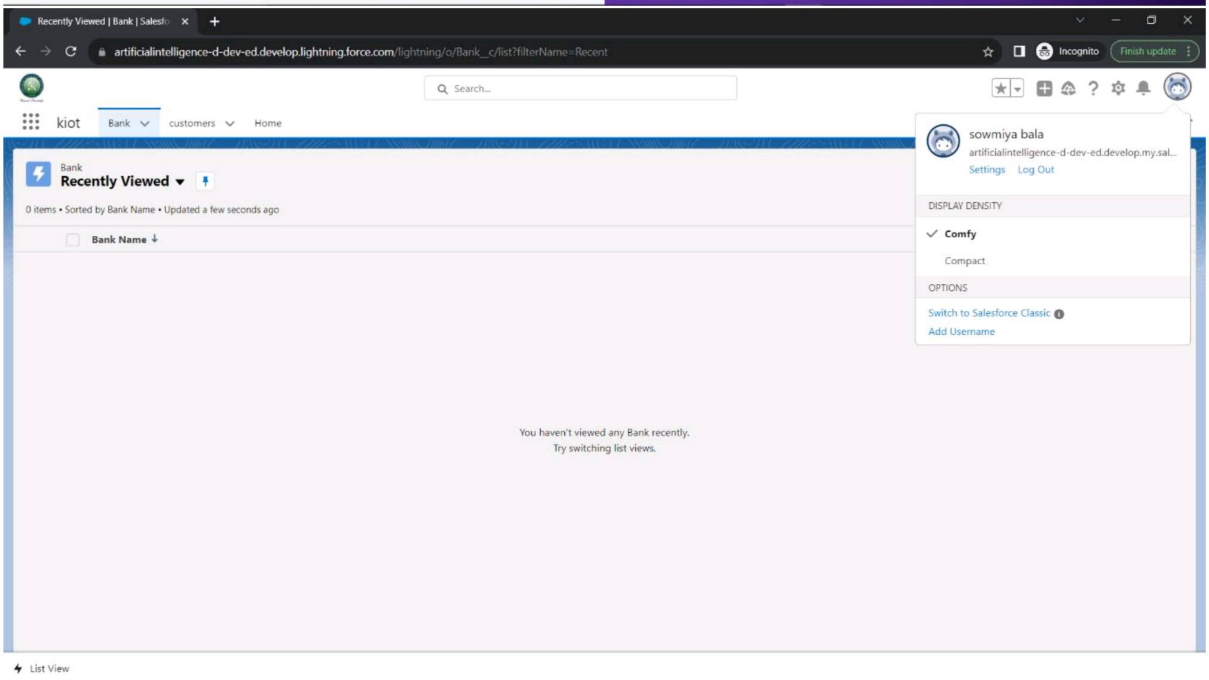

Setup
Home
Object Manager
SETUP
Users
New User
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
sowmiya
Last Name
bala
Alias
sbala
Email
2k20cse179@kiot.ac.in
Username
2k21it@kiot.ac.in
Nickname
User169616771282564526
Title
worker
Company
kiot bank
Department
Division
Role
<None Specified>
User License
Salesforce Platform
Profile
Manager
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Default Limit (300)
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode

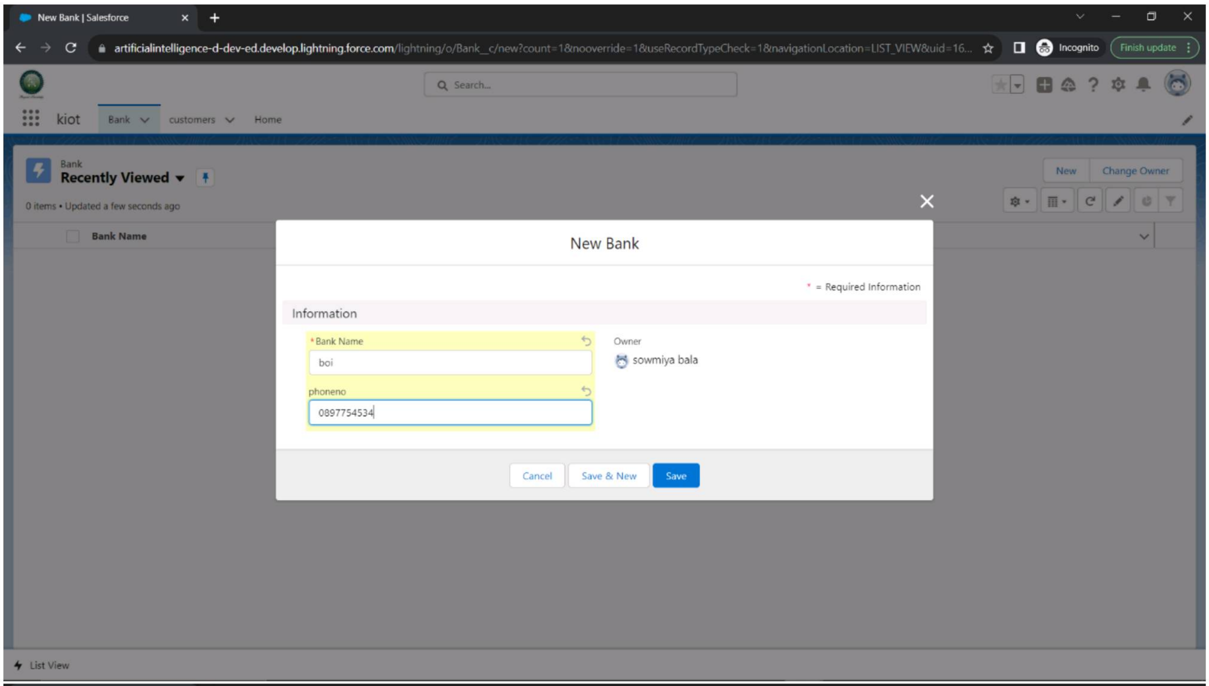

Setup
Home
Object Manager
SETUP
Users
User
sowmiya bala
User Detail
Edit
Sharing
Reset Password
Login
Freeze
Name
sowmiya bala
Alias
sbala
Email
2k20cse179@kiot.ac.in [Verify]
Username
2k21it@kiot.ac.in
Nickname
User16961677128256452616
Title
worker
Company
kiot bank
Department
Division
Address
Time 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
Role
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
View
Data.com User Type
Accessibility Mode (Classic Only)
Debug Mode
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Salesforce CRM Content User

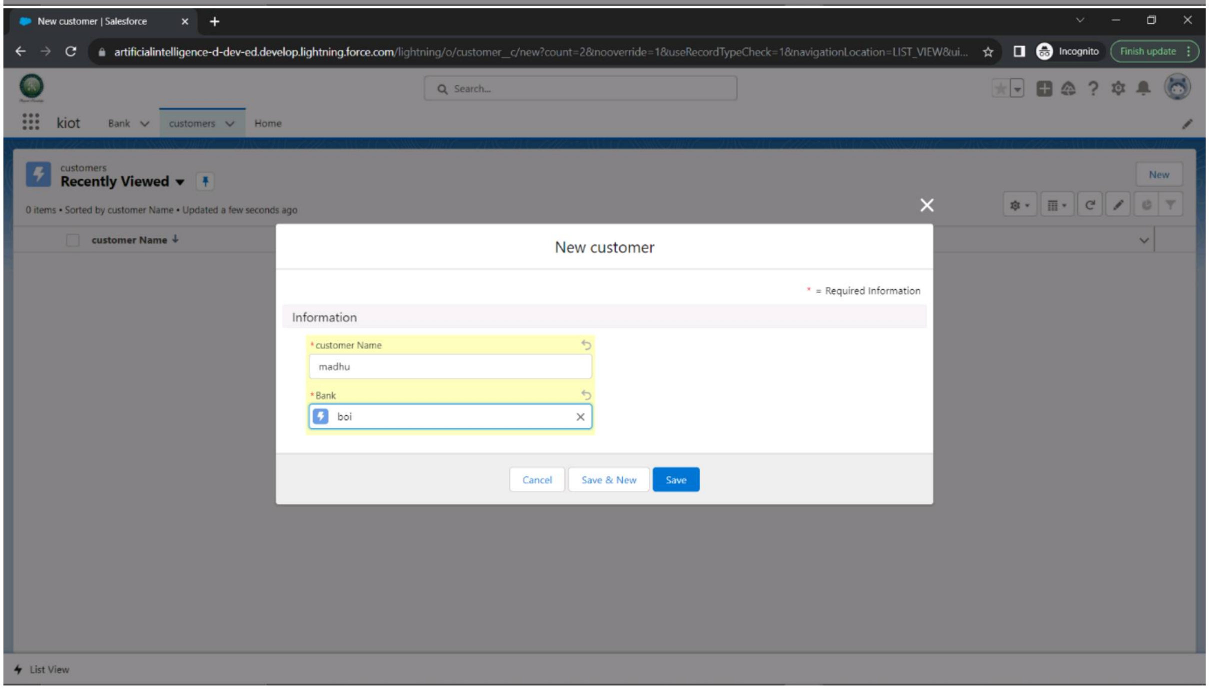

mail.google.com/mail/u/0/#inbox/FMfcgzGtxStllSsqKKLzCGhbDnsCXdvf
Gmail
Search in mail
Compose
Inbox 5,318
Starred
Snoozed
Sent
Drafts 5
More
Labels
support@salesforce.com <support@salesforce.com>
to me
7:13 PM (0 minutes ago)
salesforce
Welcome to Salesforce!
Click below to verify your account.
Verify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

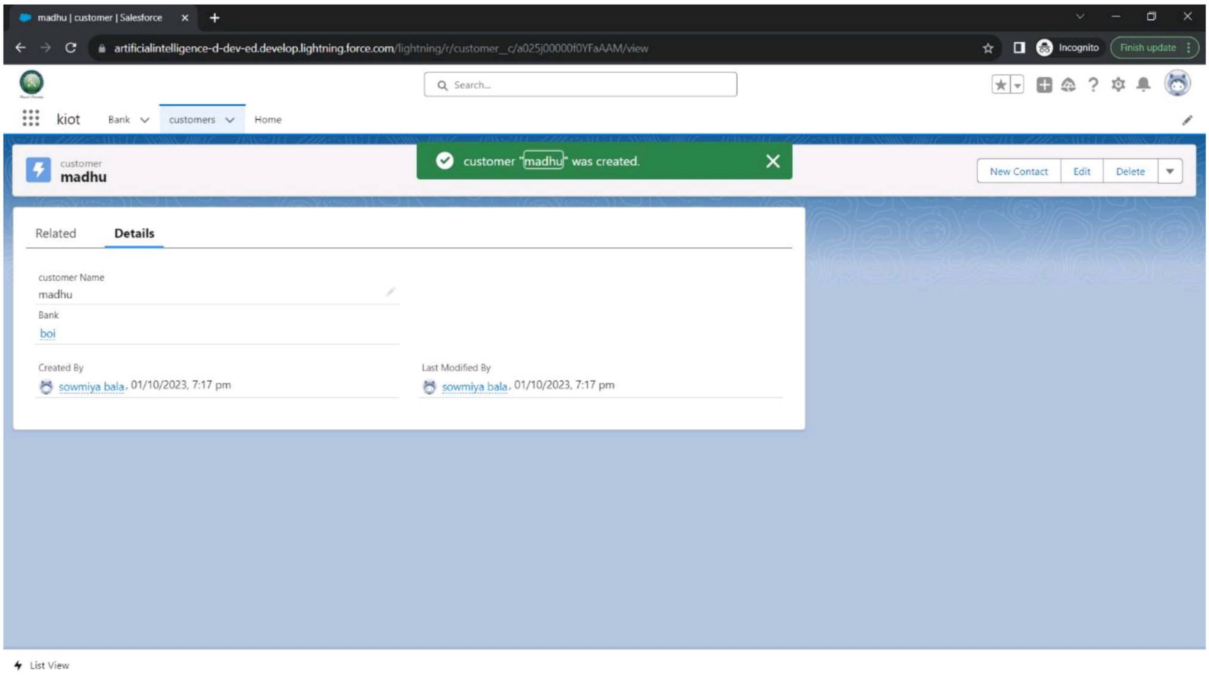

artificialintelligence-d-dev-ed.develop.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupid=Ch...
salesforce
Change Your Password
Enter a new password for 2k21it@kiot.ac.in. Make sure to include at least:
8 characters
1 letter
1 number
* New Password
Good
* Confirm New Password
Match
Security Question
In what city were you born?
* Answer
salem
Change Password
Password was last changed on 01/10/2023, 7:13 pm.

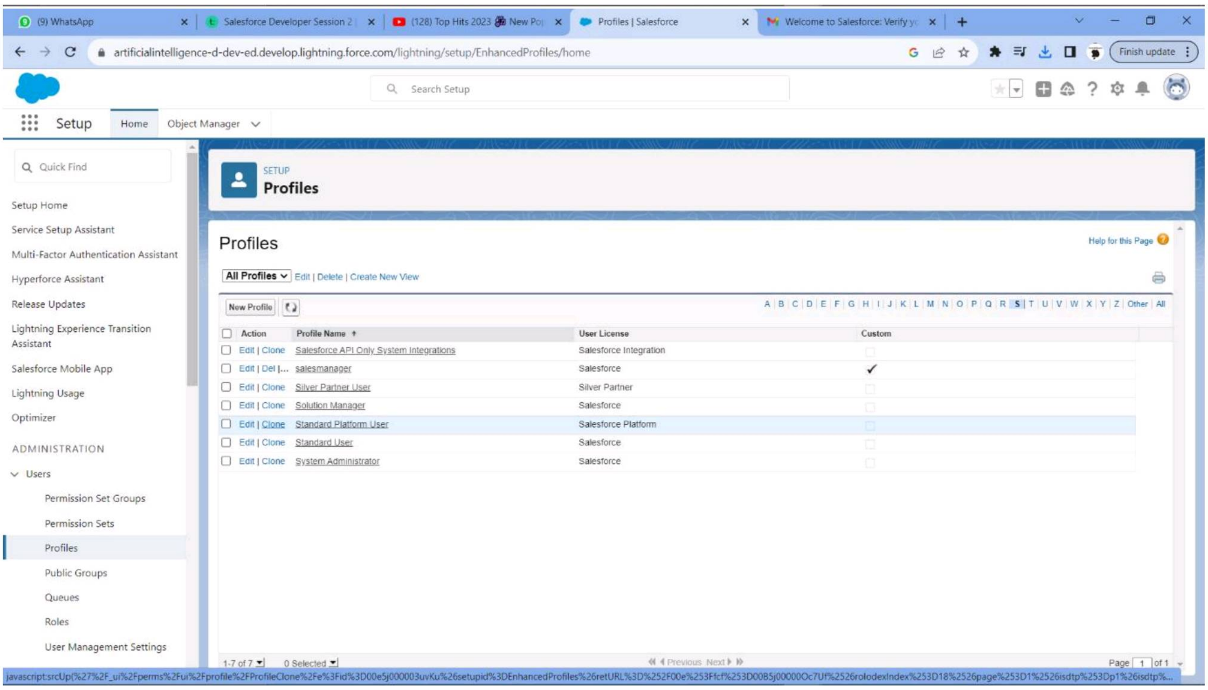

Login | Salesforce
artificialintelligence-d-dev-ed.develop.my.salesforce.com
salesforce
Username
2k21it@kiot.ac.in
Password
Log In
Remember me
Forgot Your Password?
© 2023 Salesforce, Inc. All rights reserved.
Join us for the future of trusted enterprise AI, streaming on Salesforce+.
WATCH ON DEMAND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

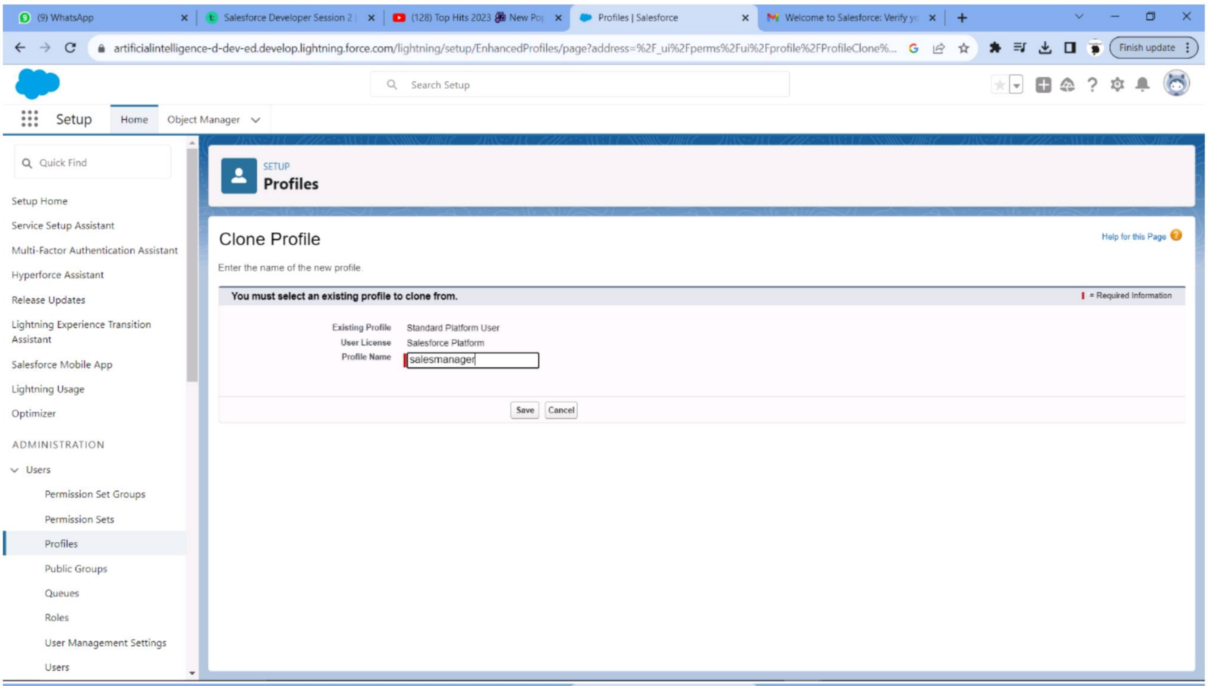

Recently Viewed | Bank | Salesfo
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/list?filterName=Recent
Search...
kiot
Bank
customers
Home
Bank
Recently Viewed
0 items • Sorted by Bank Name • Updated a few seconds ago
Bank Name
sowmiya bala
artificialintelligence-d-dev-ed.develop.my.sal...
Settings
Log Out
DISPLAY DENSITY
Comfy
Compact
OPTIONS
Switch to Salesforce Classic
Add Username
You haven't viewed any Bank recently.
Try switching list views.
List View

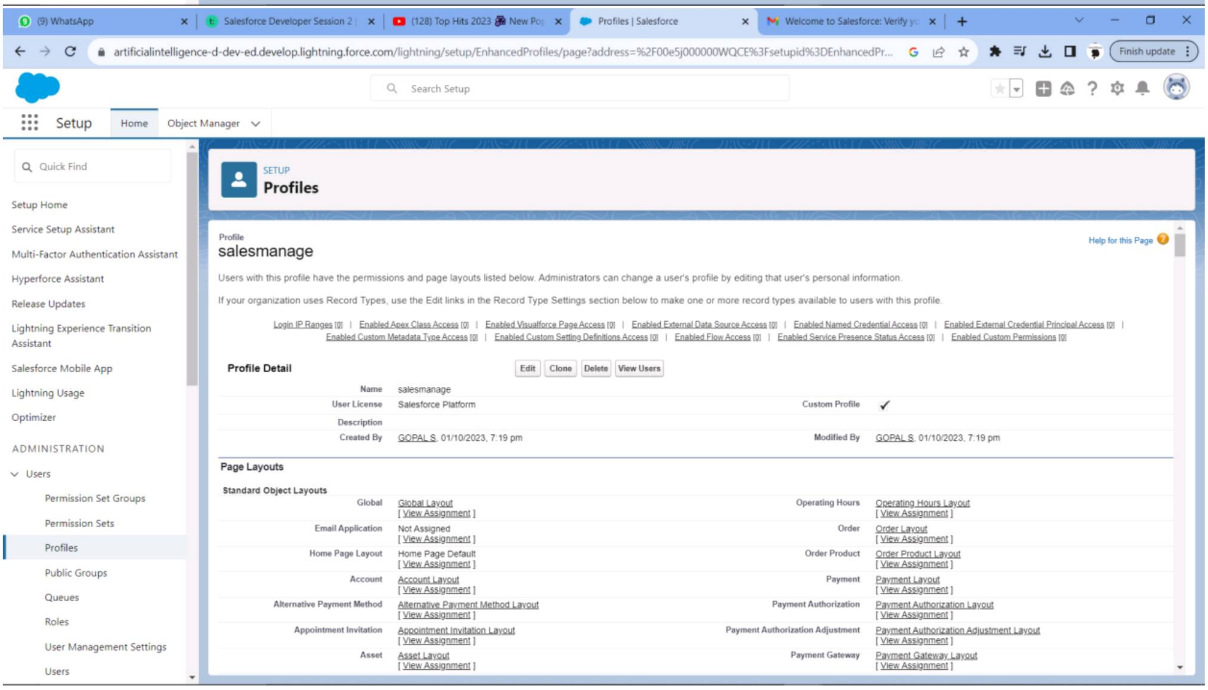

New Bank | Salesforce
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=16...
kiot
Bank
customers
Home
Bank
Recently Viewed
0 items • Updated a few seconds ago
New
Change Owner
Bank Name
New Bank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

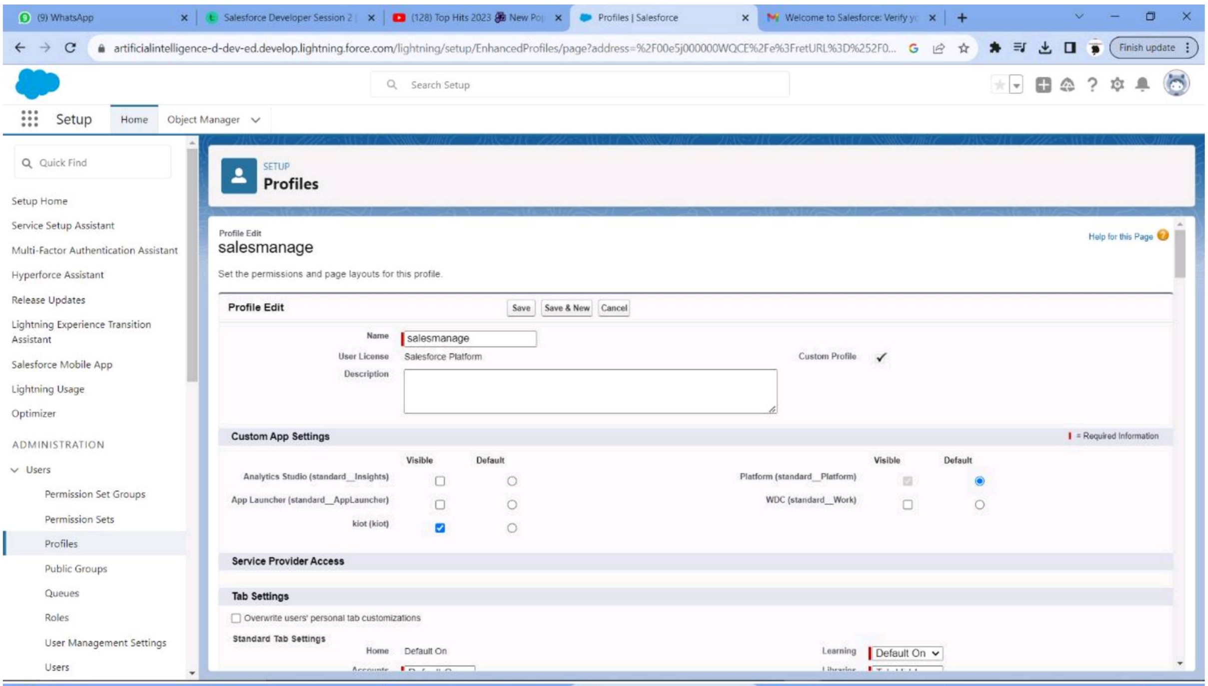

New customer | Salesforce
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer__c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&ui...
kiot
Bank
customers
Home
customers
Recently Viewed
0 items • Sorted by customer Name • Updated a few seconds ago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

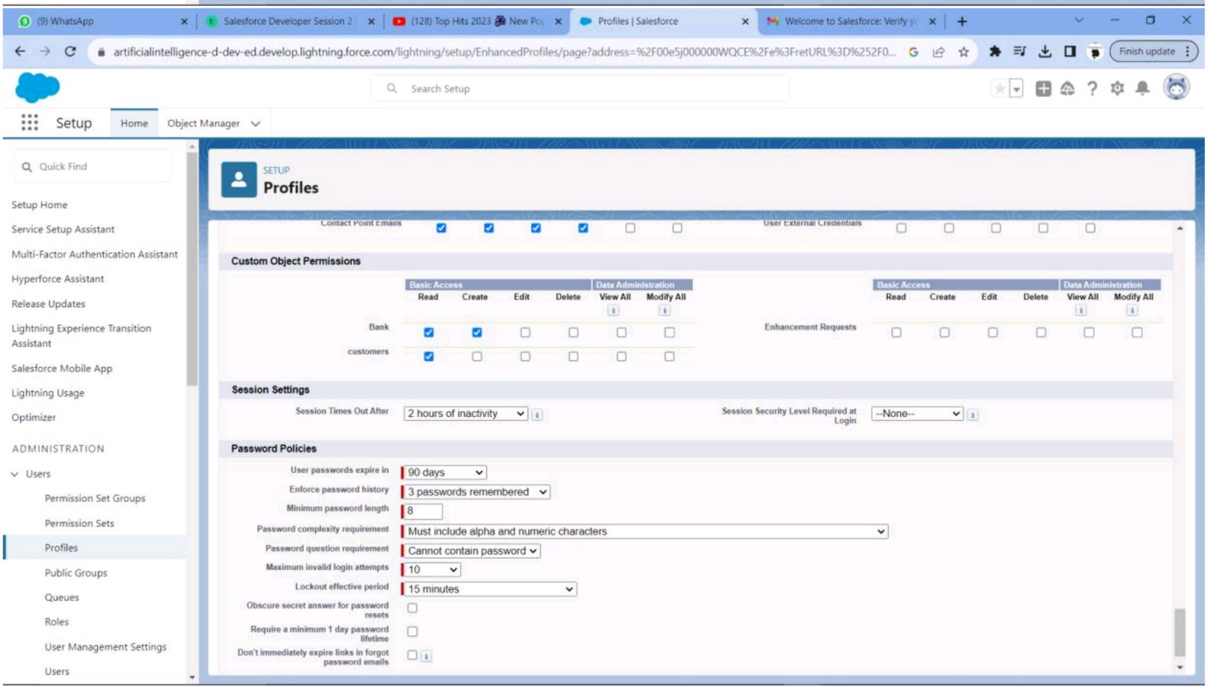

madhu | customer | Salesforce
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/r/customer__c/a025j00000f0YFaAAM/view
Incognito
Finish update
Search...
kiot
Bank
customers
Home
customer
madhu
customer "madhu" was created.
New Contact
Edit
Delete
Related
Details
customer Name
madhu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

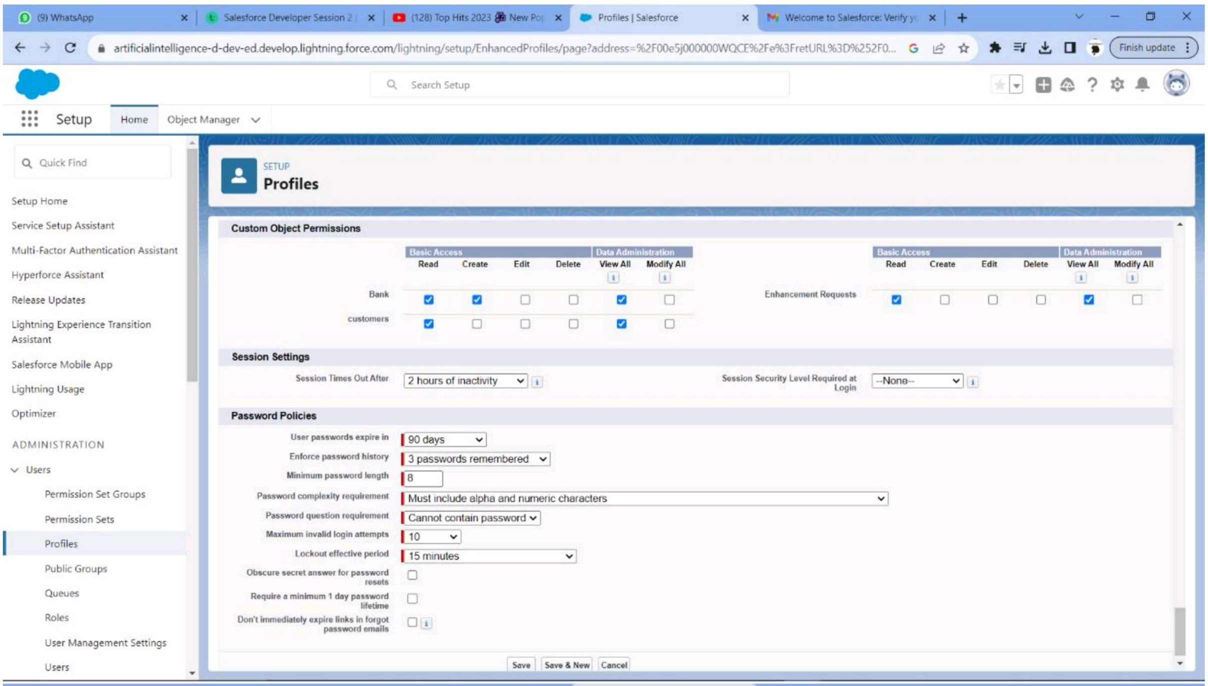

(9) WhatsApp
Salesforce Developer Session 2
(128) Top Hits 2023 New Po
Profiles | Salesforce
Welcome to Salesforce: Verify y
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home
Finish update
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service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


Setup
Home
Object Manager
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile Standard Platform User
User License Salesforce Platform
Profile Name salesmanager
Save
Cancel
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users


Setup
Home
Object Manager
SETUP
Profiles
Profile
salesmanage
Help for this Page
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Profile Detail
Edit
Clone
Delete
View Users
Name salesmanage
User License Salesforce Platform
Custom Profile
Description
Created By GOPAL S, 01/10/2023, 7:19 pm
Modified By GOPAL S, 01/10/2023, 7:19 pm
Page Layouts
Standard Object Layouts
Global Global Layout
Operating Hours Operating Hours Layout
Email Application Not Assigned
Order Order Layout
Home Page Layout Home Page Default
Order Product Order Product Layout
Account Account Layout
Payment Payment Layout
Alternative Payment Method Alternative Payment Method Layout
Payment Authorization Payment Authorization Layout
Appointment Invitation Appointment Invitation Layout
Payment Authorization Adjustment Payment Authorization Adjustment Layout
Asset Asset Layout
Payment Gateway Payment Gateway Layout
[View Assignment]


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


Profiles | Salesforce
SETUP
Profiles
Contact Point Emails
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
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


Profiles | Salesforce
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%2Fe%3FretURL%3D%252F0...
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
SETUP
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
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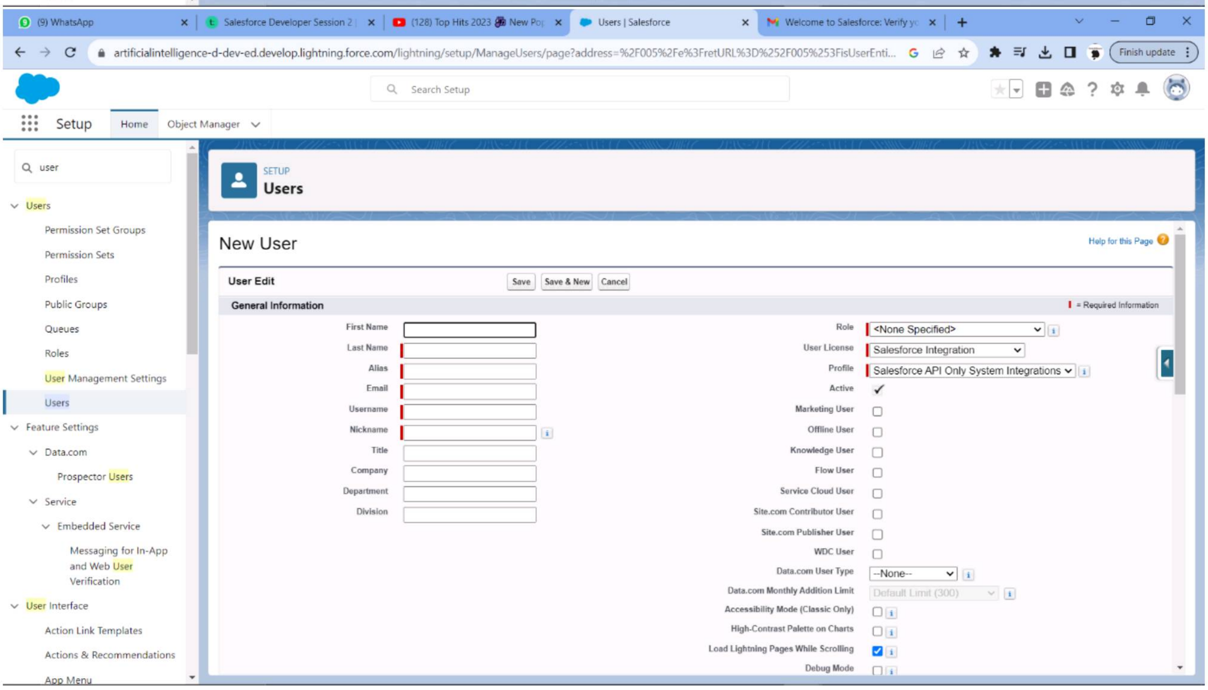
Maximum invalid login attempts
10
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails
Save
Save & New
Cancel


Users | Salesforce
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Setup
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user
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Permission Set Groups
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Public Groups
Queues
Roles
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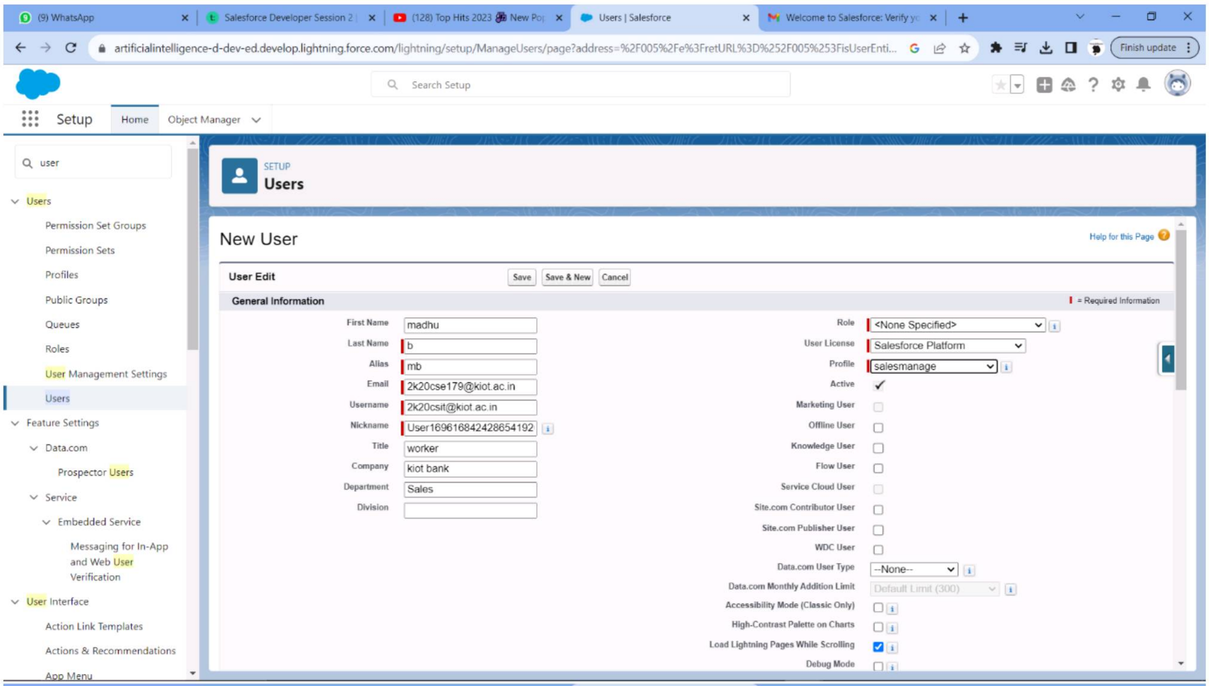
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division
Role
<None Specified>
User License
Salesforce Integration
Profile
Salesforce API Only System Integrations
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Default Limit (300)
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEnti...
Search Setup
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Prospector Users
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Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
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New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
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Last Name
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Email
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Username
2k20csit@kiot.ac.in
Nickname
User169616842428654192
Title
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Department
Sales
Division
Role
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User License
Salesforce Platform
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salesmanage
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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
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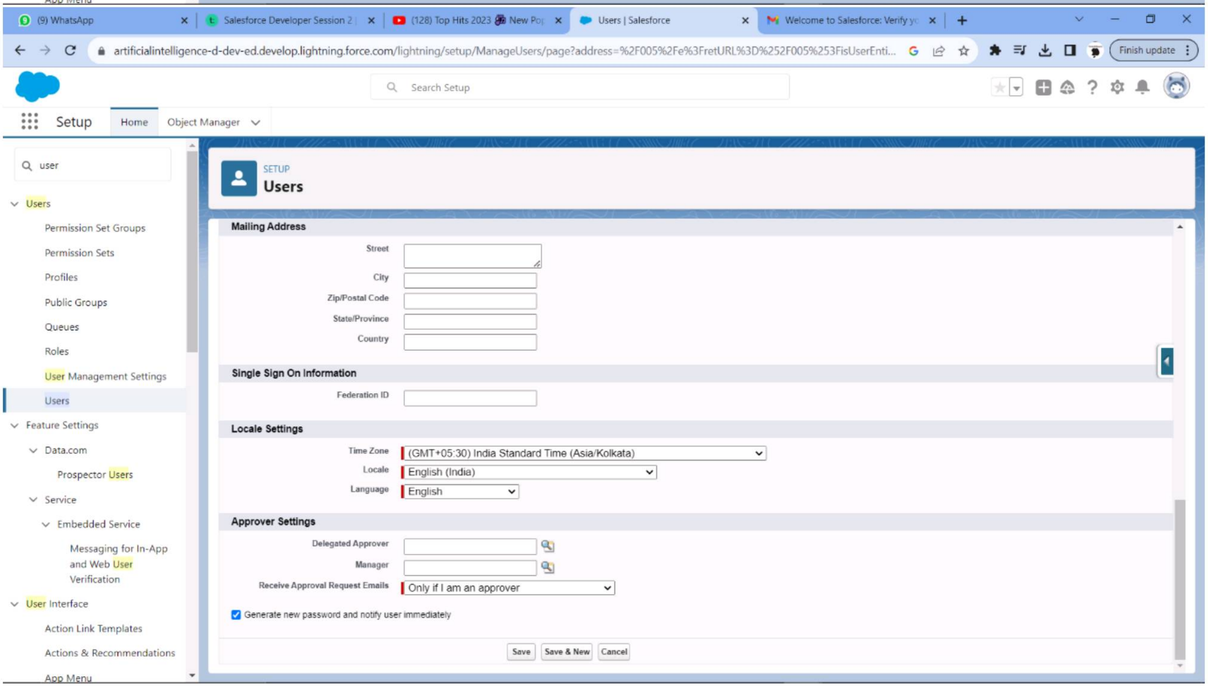
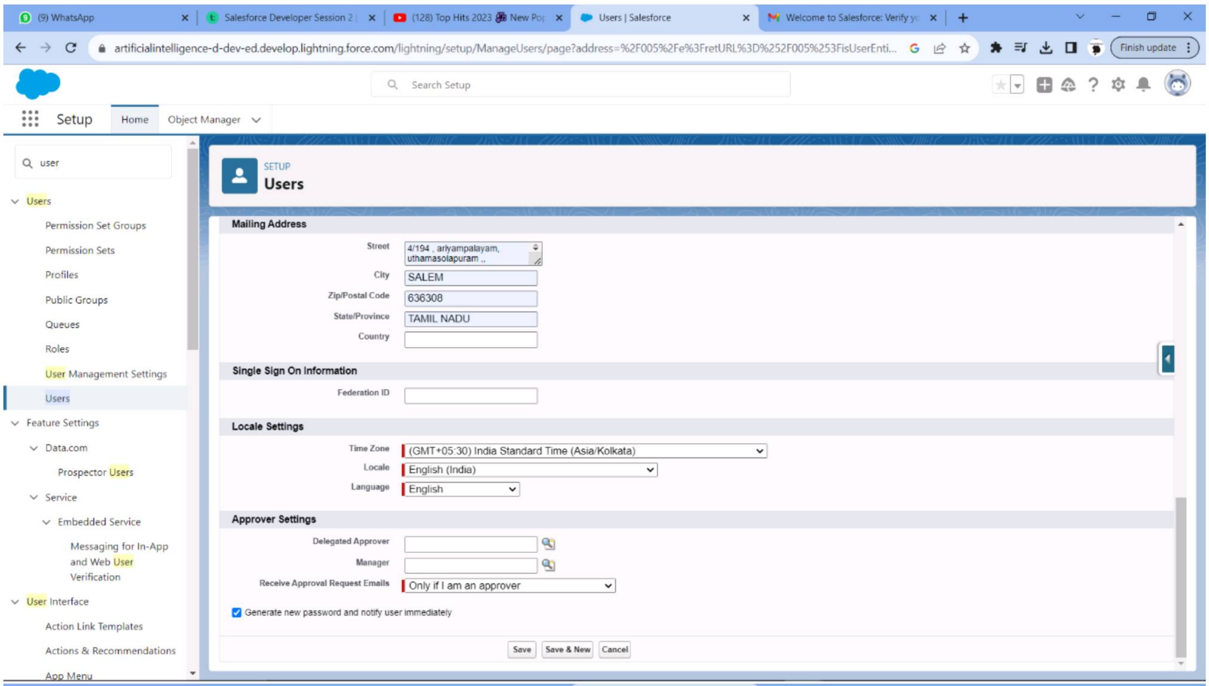
Data.com Monthly Addition Limit
Default Limit (300)
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode


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



Setup
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Profiles
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Queues
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Feature Settings
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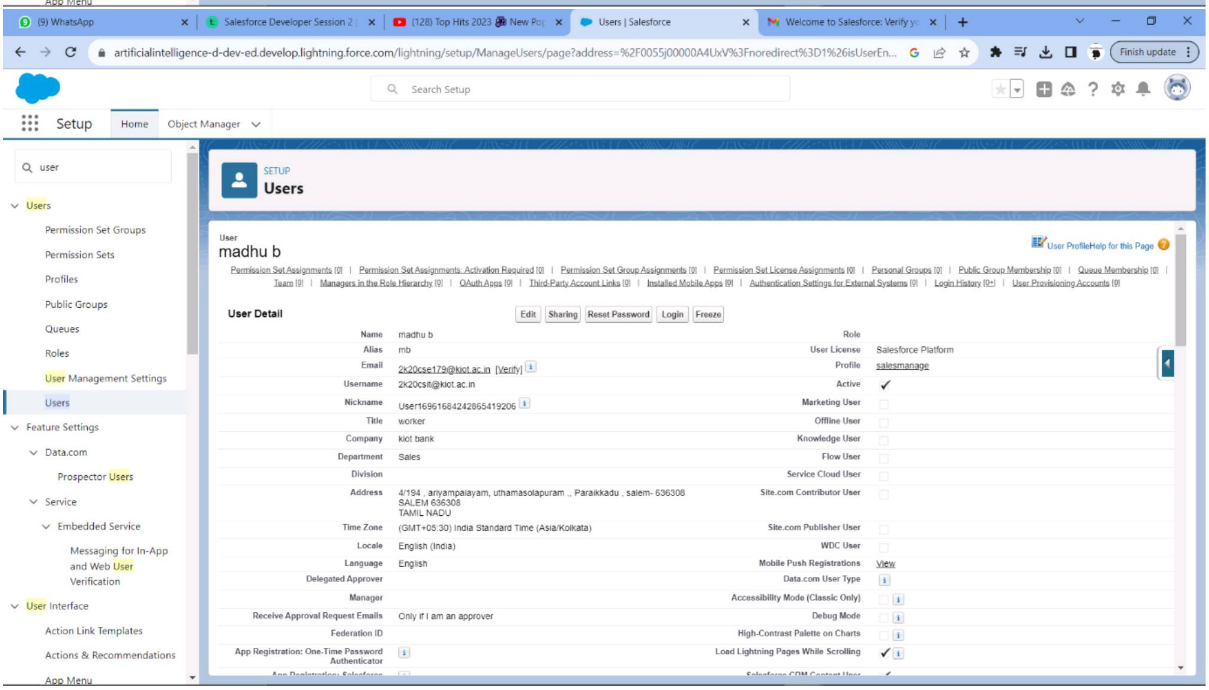
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
Users
Mailing Address
Street 4/194 , ariyampalayam, uthamasolapuram ,,
City SALEM
Zip/Postal Code 636308
State/Province TAMIL NADU
Country
Single Sign On Information
Federation ID
Locale Settings
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Approver Settings
Delegated Approver
Manager
Receive Approval Request Emails Only if I am an approver
Generate new password and notify user immediately
Save
Save & New
Cancel



Setup
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Object Manager
Search Setup
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
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User Interface
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App Menu
SETUP
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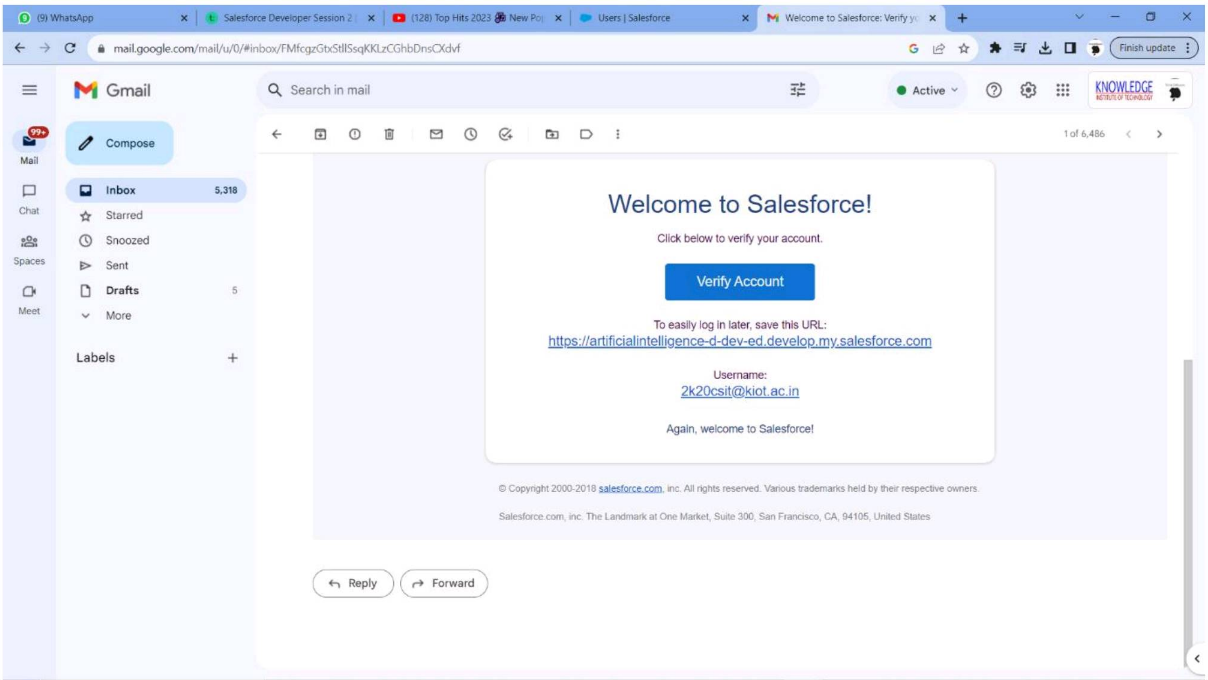
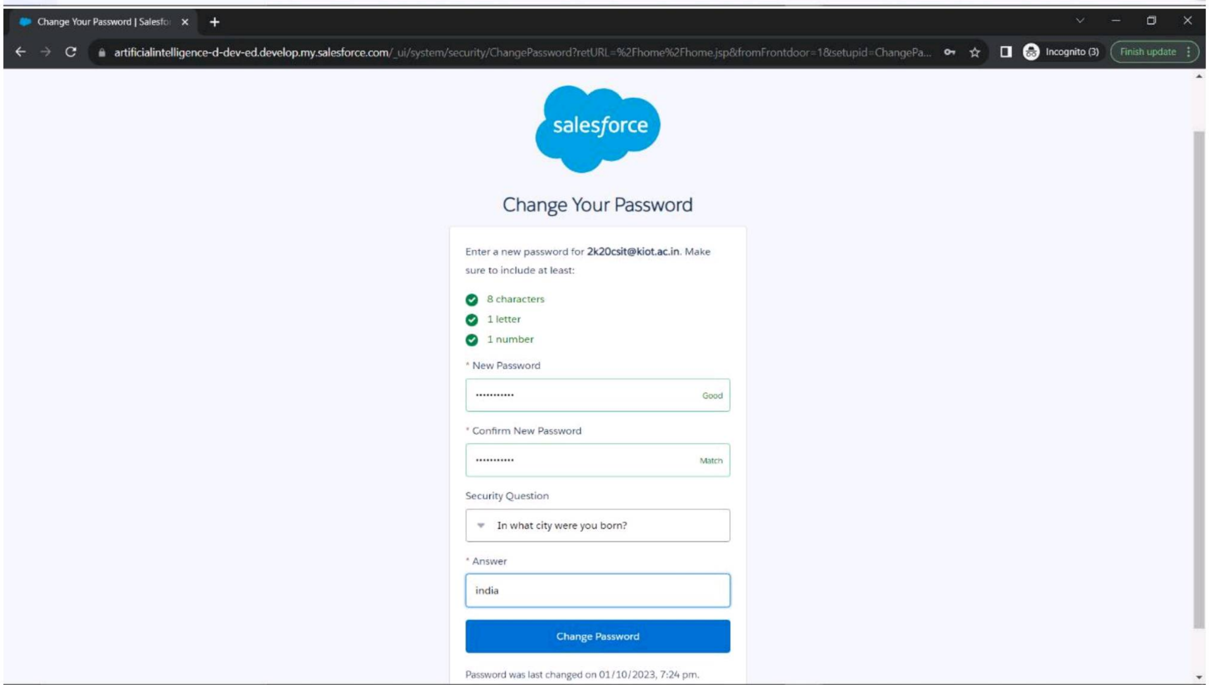
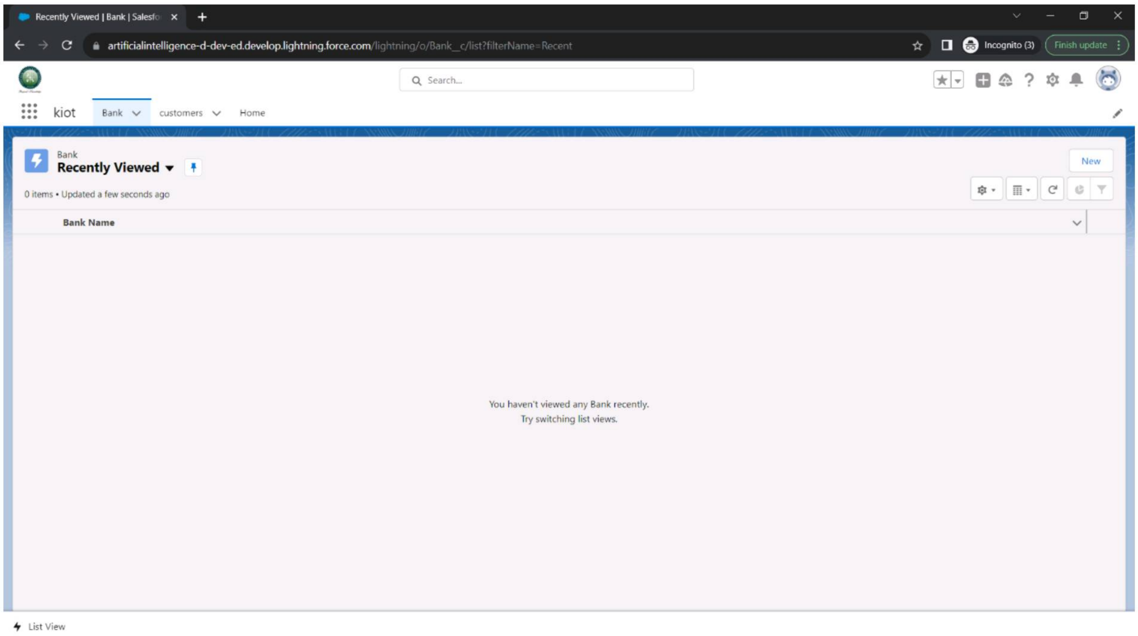
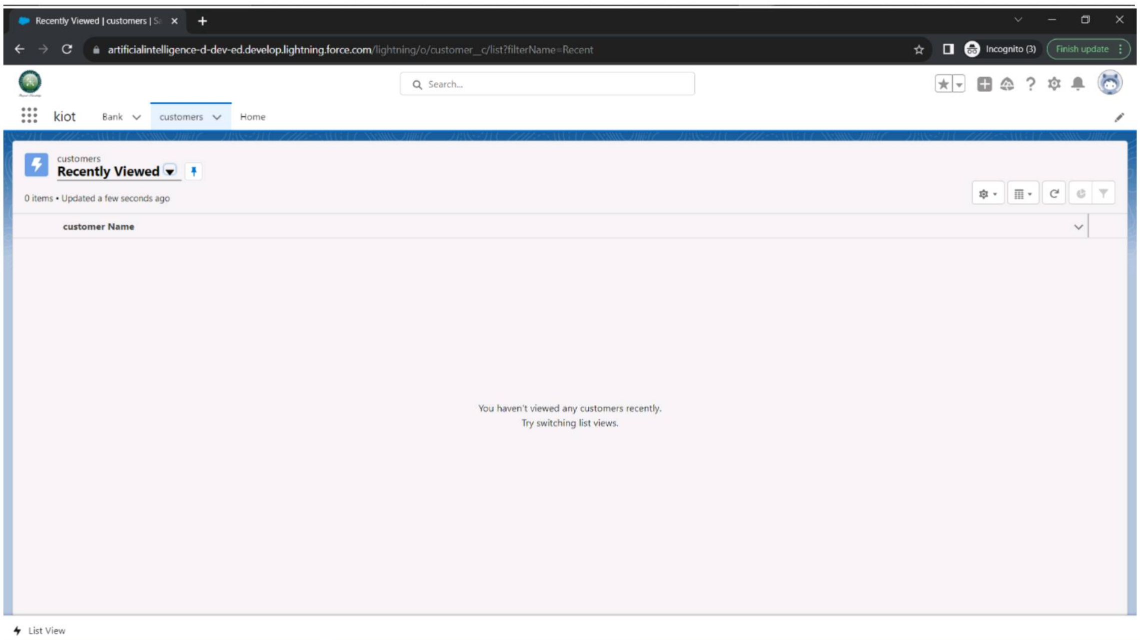
User Profile Help for this Page
User Detail
Edit
Sharing
Reset Password
Login
Freeze
Name madhu b
Role
Alias mb
User License Salesforce Platform
Email 2k20cse179@kiot.ac.in [Verify]
Profile salesmanage
Username 2k20csit@kiot.ac.in
Active
Nickname User16961684242865419206
Marketing User
Title worker
Offline User
Company kiot bank
Knowledge User
Department Sales
Flow User
Division
Service Cloud User
Address 4/194 , ariyampalayam, uthamasolapuram ,, Paraikkadu , salem- 636308 SALEM 636308 TAMIL NADU
Site.com Contributor User
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Site.com Publisher User
Locale English (India)
WDC User
Language English
Mobile Push Registrations View
Delegated Approver
Data.com User Type
Manager
Accessibility Mode (Classic Only)
Receive Approval Request Emails Only if I am an approver
Debug Mode
Federation ID
High-Contrast Palette on Charts
App Registration: One-Time Password Authenticator
Load Lightning Pages While Scrolling


mail.google.com/mail/u/0/#inbox/FMfcgzGtxStllSsqKKLzCGhbDnsCXdvf
Gmail
Search in mail
Compose
Inbox 5,318
Starred
Snoozed
Sent
Drafts 5
More
Labels
1 of 6,486
Welcome to Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://artificialintelligence-d-dev-ed.develop.my.salesforce.com
Username:
2k20csit@kiot.ac.in
Again, welcome to Salesforce!
© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.
Salesforce.com, inc. The Landmark at One Market, Suite 300, San Francisco, CA, 94105, United States
Reply
Forward


Change Your Password | Salesforce
salesforce
Change Your Password
Enter a new password for 2k20csit@kiot.ac.in. Make sure to include at least:
8 characters
1 letter
1 number
* New Password
Good
* Confirm New Password
Match
Security Question
In what city were you born?
* Answer
india
Change Password
Password was last changed on 01/10/2023, 7:24 pm.


Recently Viewed | Bank | Salesfo
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/list?filterName=Recent
Incognito (3)
Finish update
Search...
kiot
Bank
customers
Home
Bank
Recently Viewed
New
0 items • Updated a few seconds ago
Bank Name
You haven't viewed any Bank recently.
Try switching list views.
List View


Recently Viewed | customers | S
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer__c/list?filterName=Recent
Incognito (3)
Finish update
Search...
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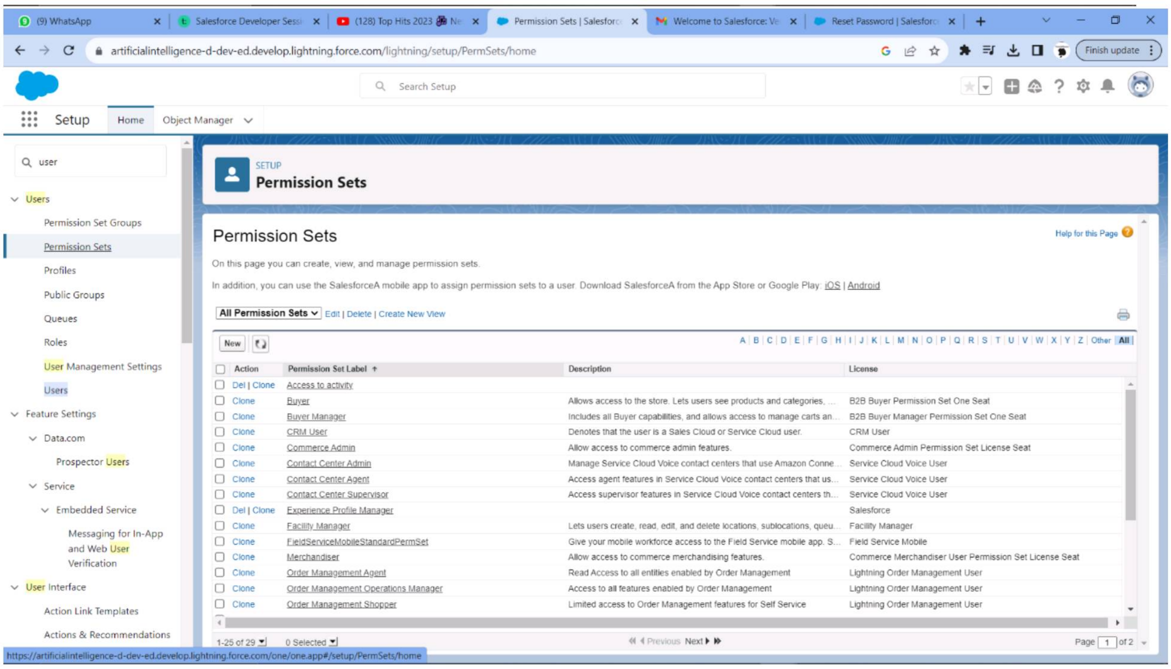
customers
Home
customers
Recently Viewed
0 items • Updated a few seconds ago
customer Name
You haven't viewed any customers recently.
Try switching list views.
List View


(9) WhatsApp
Salesforce Developer Sessi
(128) Top Hits 2023
Permission Sets | Salesforc
Welcome to Salesforce: Ve
Reset Password | Salesforc
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home
Finish update
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Setup
Home
Object Manager
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Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
SETUP
Permission Sets
Permission Sets
Help for this Page
On this page you can create, view, and manage permission sets.
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android
All Permission Sets
Edit | Delete | Create New View
New
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action
Permission Set Label
Description
License
Del | Clone
Access to activity
Clone
Buyer
Allows access to the store. Lets users see products and categories, ...
B2B Buyer Permission Set One Seat
Clone
Buyer Manager
Includes all Buyer capabilities, and allows access to manage carts an...
B2B Buyer Manager Permission Set One Seat
Clone
CRM User
Denotes that the user is a Sales Cloud or Service Cloud user.
CRM User
Clone
Commerce Admin
Allow access to commerce admin features.
Commerce Admin Permission Set License Seat
Clone
Contact Center Admin
Manage Service Cloud Voice contact centers that use Amazon Conne...
Service Cloud Voice User
Clone
Contact Center Agent
Access agent features in Service Cloud Voice contact centers that us...
Service Cloud Voice User
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Contact Center Supervisor
Access supervisor features in Service Cloud Voice contact centers th...
Service Cloud Voice User
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Experience Profile Manager
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Clone
Facility Manager
Lets users create, read, edit, and delete locations, sublocations, queu...
Facility Manager
Clone
FieldServiceMobileStandardPermSet
Give your mobile workforce access to the Field Service mobile app. S...
Field Service Mobile
Clone
Merchandiser
Allow access to commerce merchandising features.
Commerce Merchandiser User Permission Set License Seat
Clone
Order Management Agent
Read Access to all entities enabled by Order Management
Lightning Order Management User
Clone
Order Management Operations Manager
Access to all features enabled by Order Management
Lightning Order Management User
Clone
Order Management Shopper
Limited access to Order Management features for Self Service
Lightning Order Management User
1-25 of 29
0 Selected
Previous
Next
Page 1 of 2
https://artificialintelligence-d-dev-ed.develop.lightning.force.com/one/one.app#/setup/PermSets/home

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

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

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

Ownership:

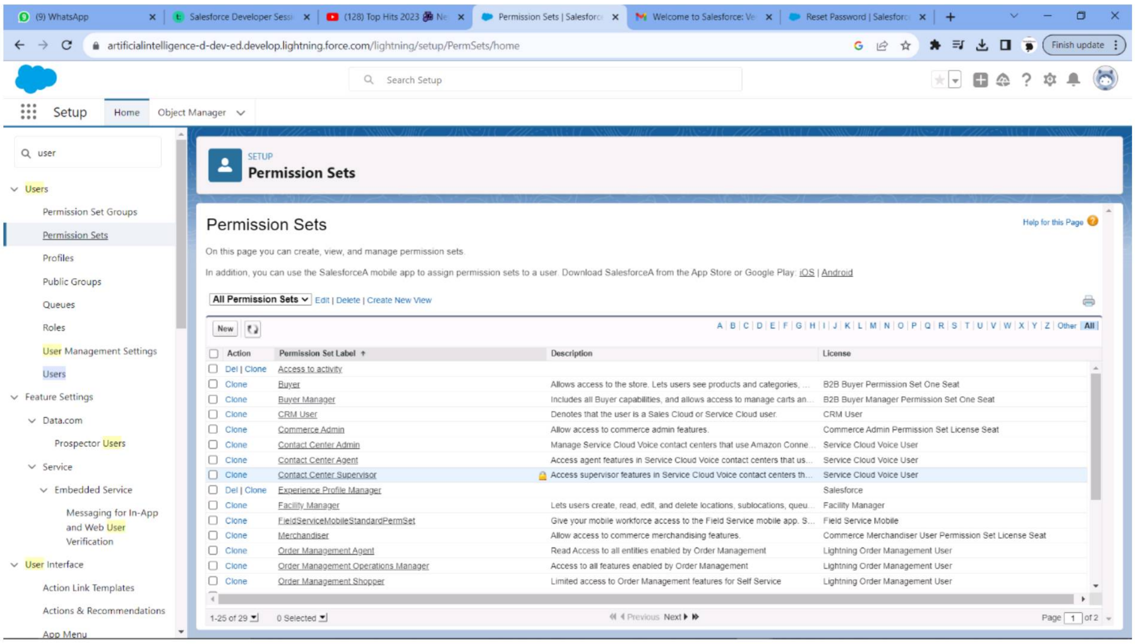
• Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

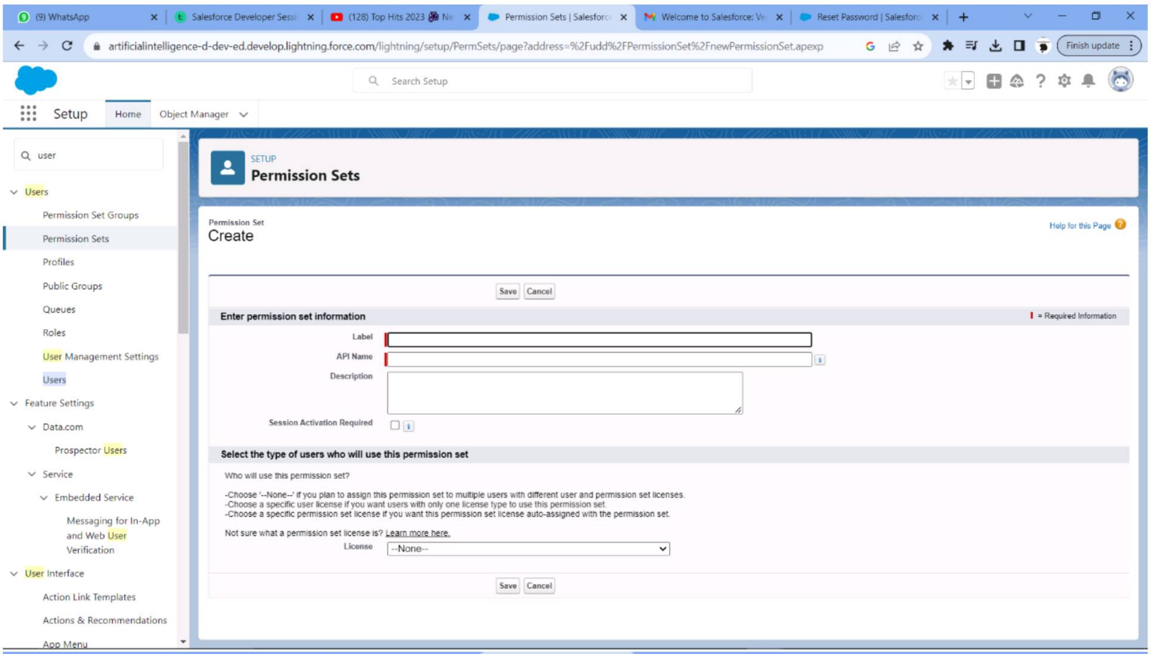
Organization-Wide Defaults:

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

Testing:

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




Setup
Home
Object Manager
Search Setup
user
Users
Permission Set Groups
Permission Sets
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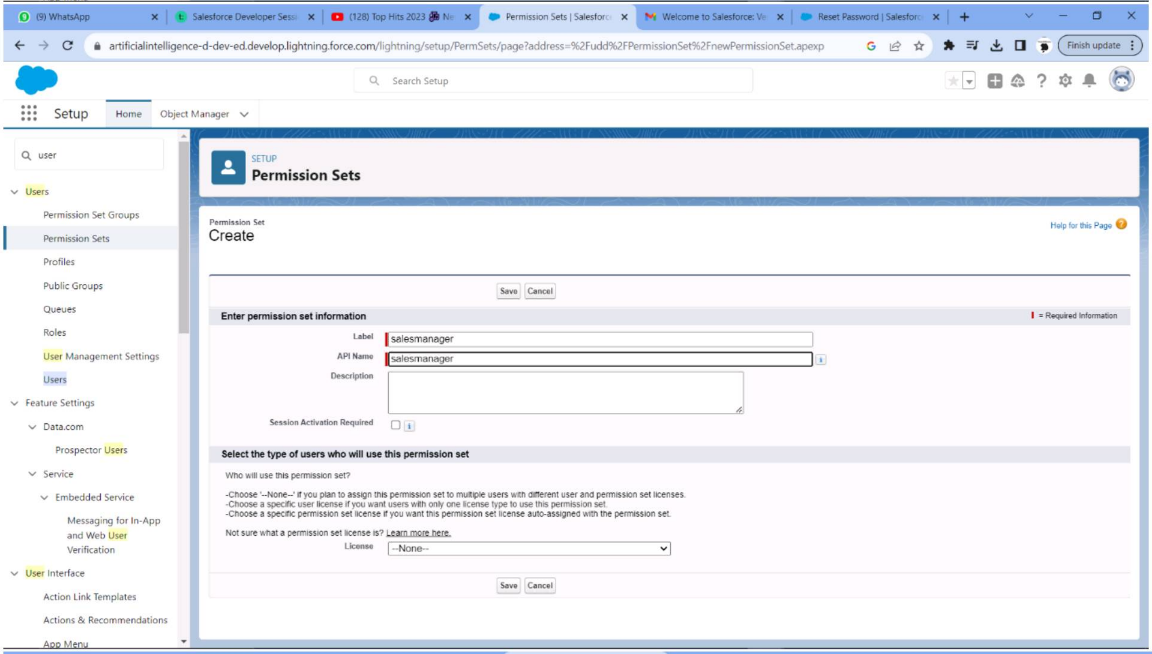
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
Permission Sets
Permission Set
Create
Help for this Page
Save Cancel
Enter permission set information
= Required Information
Label
API Name
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
Not sure what a permission set license is? Learn more here.
License
--None--
Save Cancel


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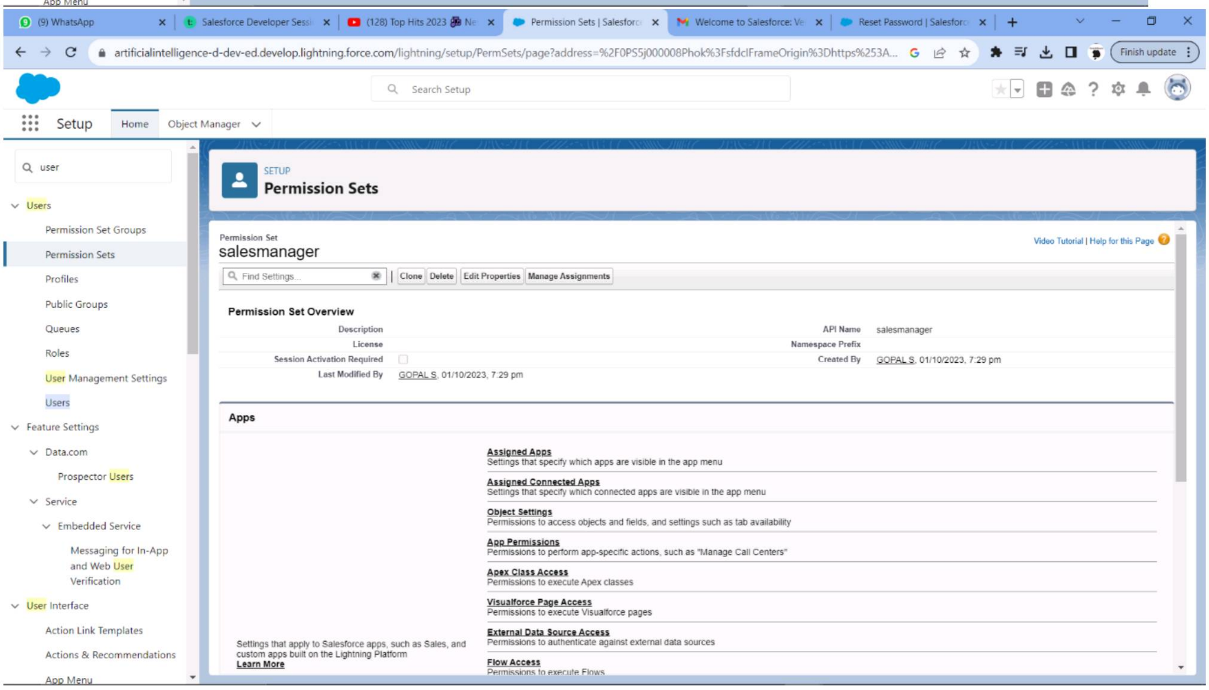
Help for this Page
Save Cancel
Enter permission set information
= Required Information
Label salesmanager
API Name salesmanager
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
-Choose '--None--' if you plan to assign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


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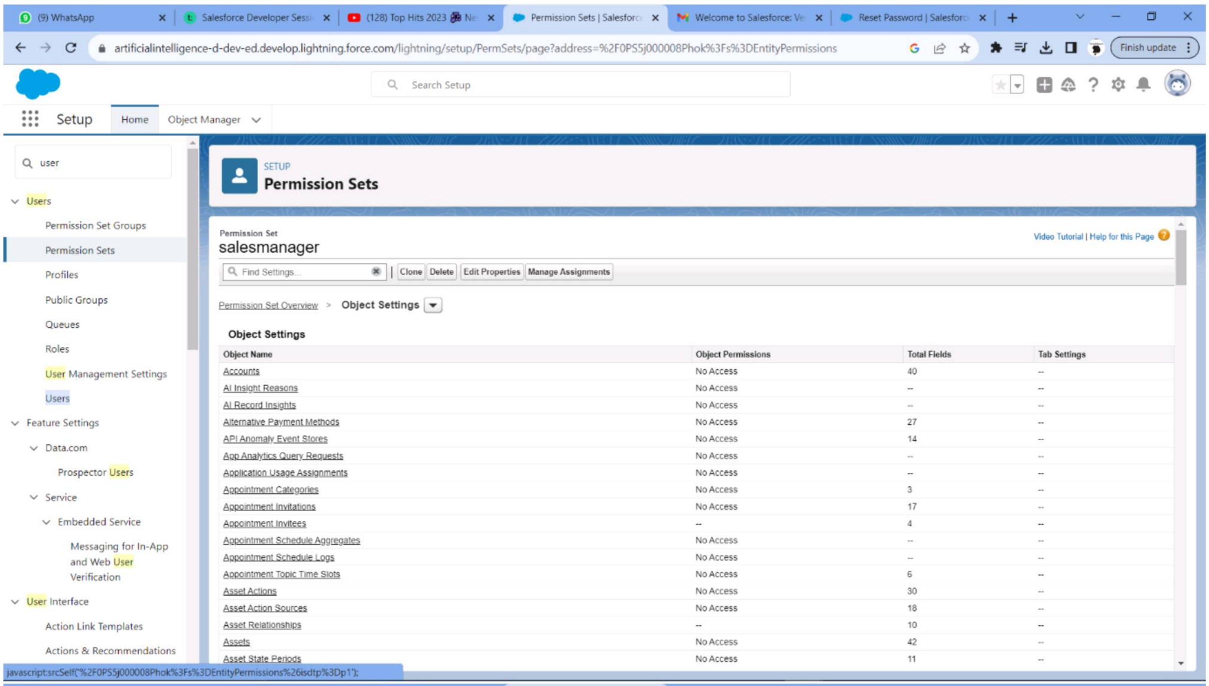
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
Permission Sets
Permission Set
salesmanager
Video Tutorial | Help for this Page
Find Settings...
Clone Delete Edit Properties Manage Assignments
Permission Set Overview
Description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


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008Phok%3Fs%3DEntityPermissions
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Prospector Users
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Messaging for In-App and Web User Verification
User Interface
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SETUP
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Video Tutorial | Help for this Page
Find Settings...
Clone
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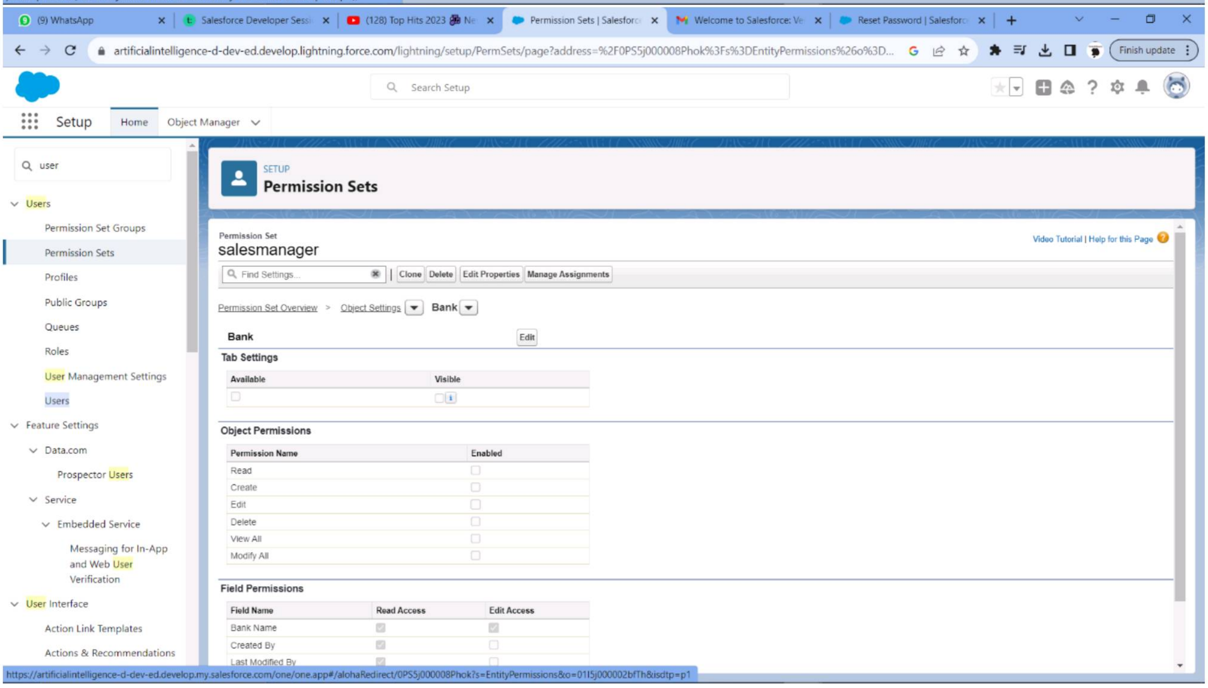
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
Object Settings
Object Name
Object Permissions
Total Fields
Tab Settings
Accounts No Access 40 --
AI Insight Reasons No Access -- --
AI Record Insights No Access -- --
Alternative Payment Methods No Access 27 --
API Anomaly Event Stores No Access 14 --
App Analytics Query Requests No Access -- --
Application Usage Assignments No Access -- --
Appointment Categories No Access 3 --
Appointment Invitations No Access 17 --
Appointment Invitees -- 4 --
Appointment Schedule Aggregates No Access -- --
Appointment Schedule Logs No Access -- --
Appointment Topic Time Slots No Access 6 --
Asset Actions No Access 30 --
Asset Action Sources No Access 18 --
Asset Relationships -- 10 --
Assets No Access 42 --
Asset State Periods No Access 11 --
javascript:srcSelf('%2F0PS5j000008Phok%3Fs%3DEntityPermissions%26isdtp%3Dp1');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Search Setup
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Video Tutorial | Help for this Page
Find Settings...
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Edit Properties
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Permission Set Overview > Object Settings > Bank
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Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Bank Name
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Last Modified By
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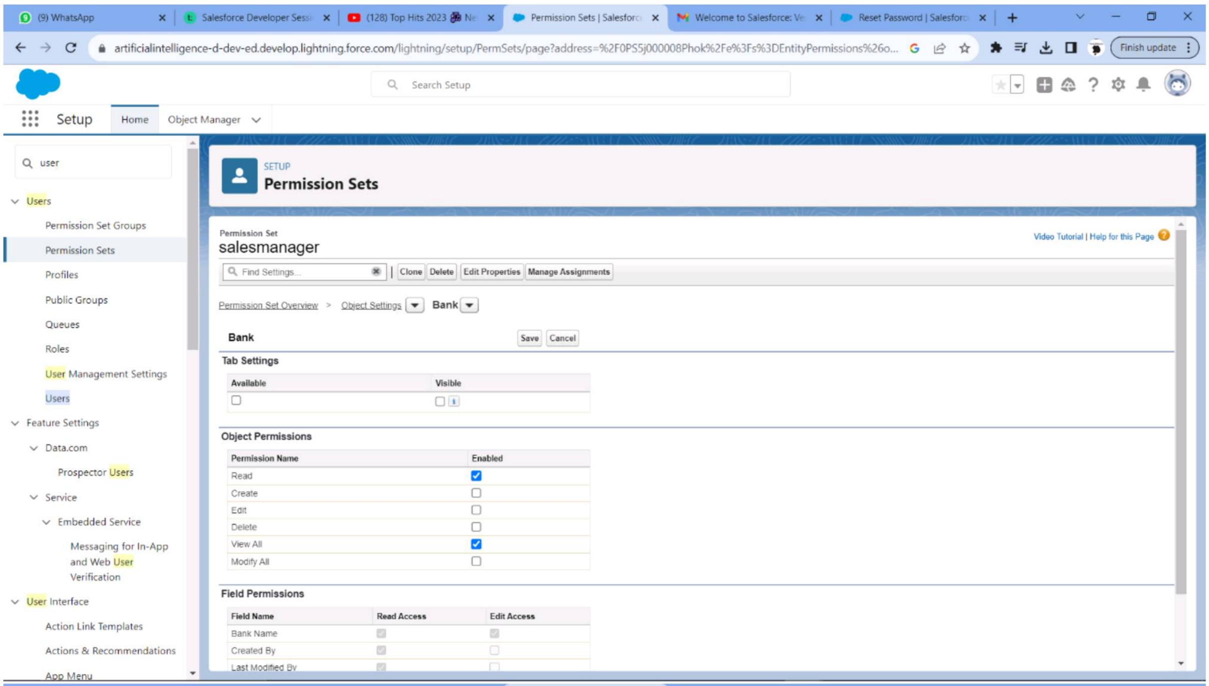
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008Phok%2Fe%3Fs%3DEntityPermissions%26o...
Search Setup
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Prospector Users
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Messaging for In-App and Web User Verification
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App Menu
SETUP
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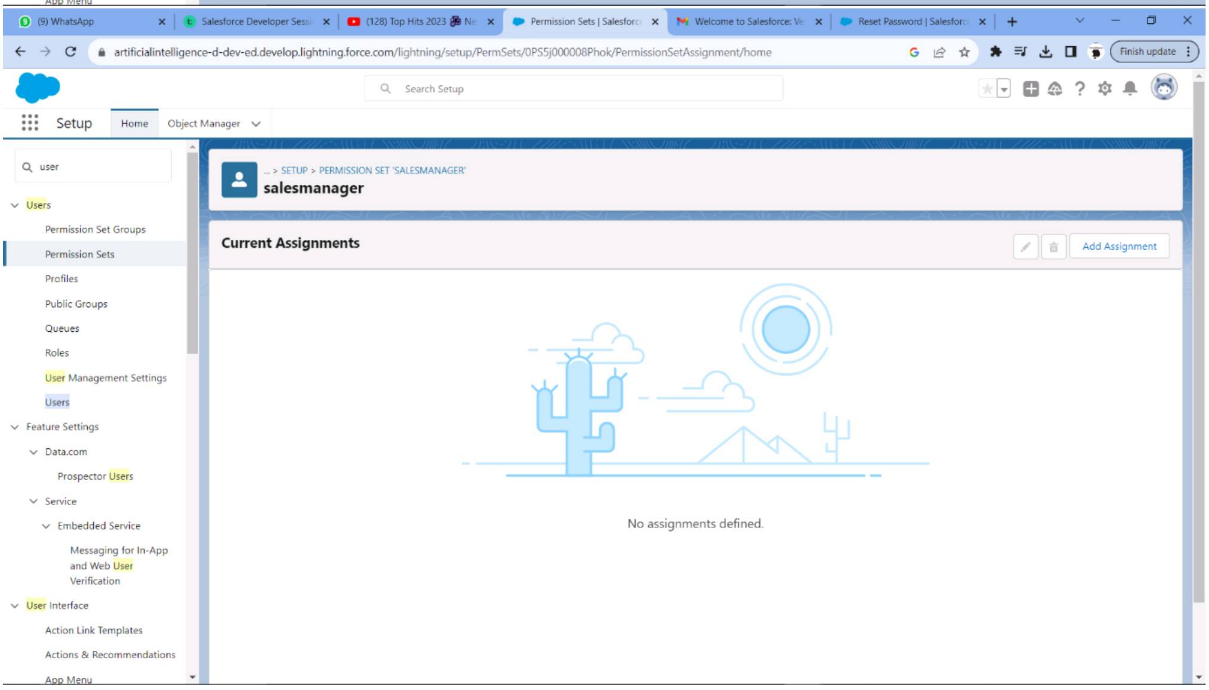
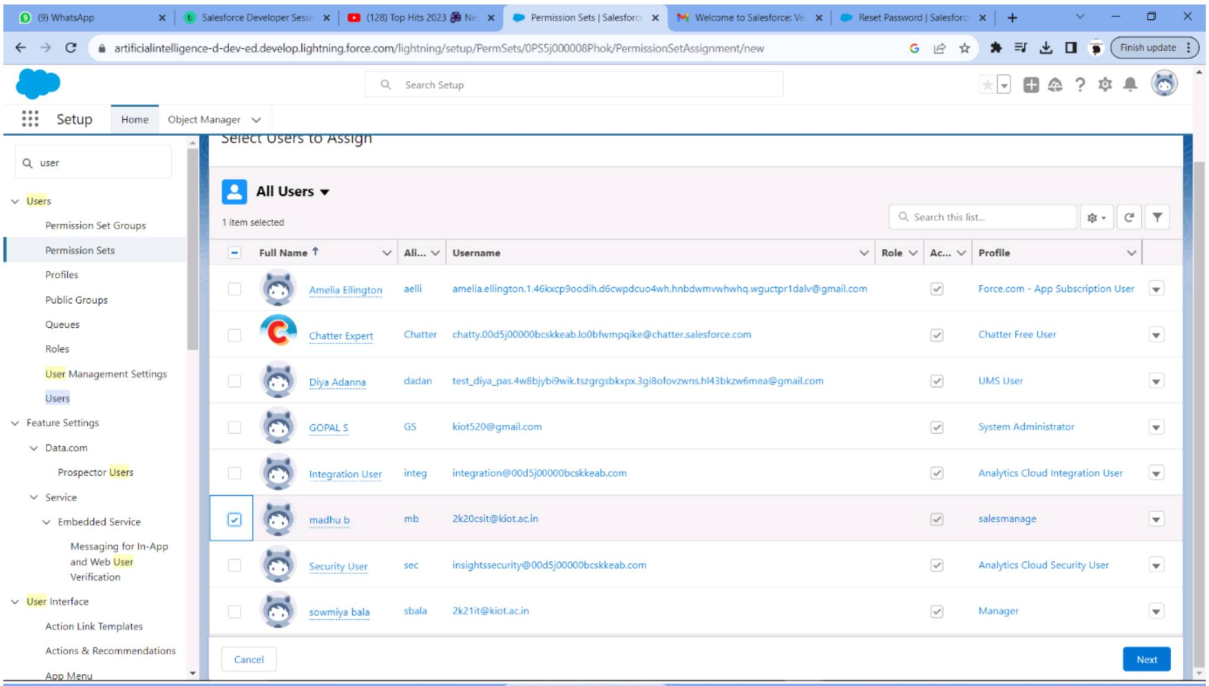
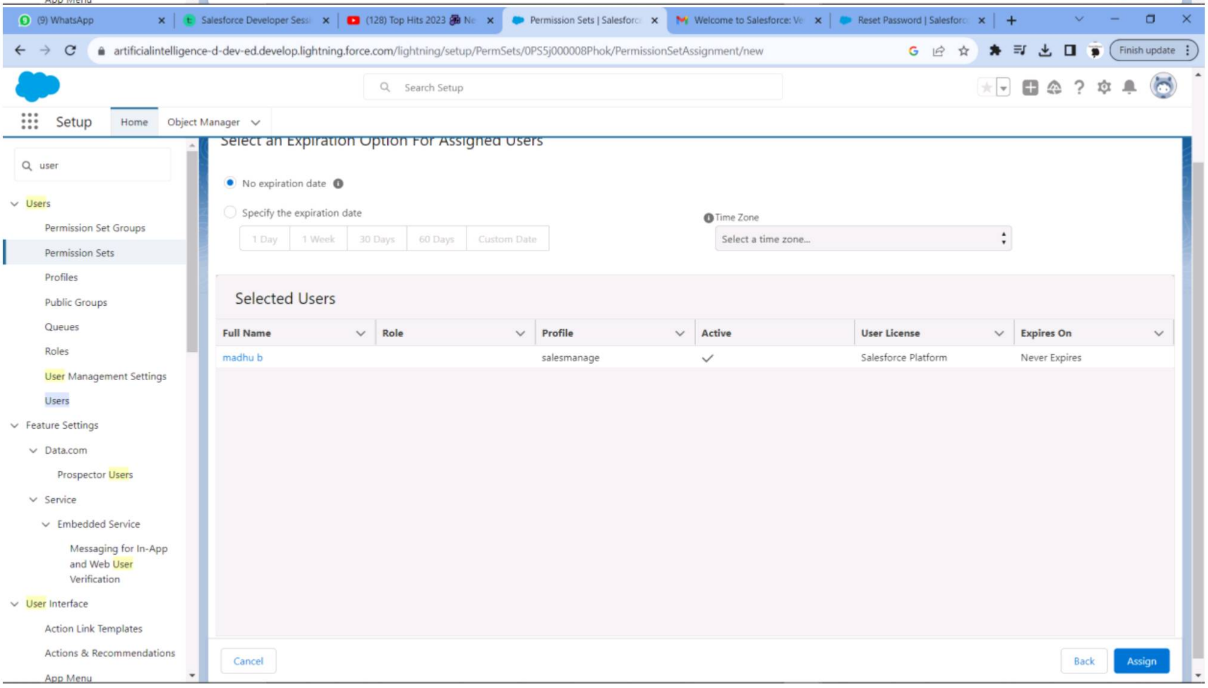
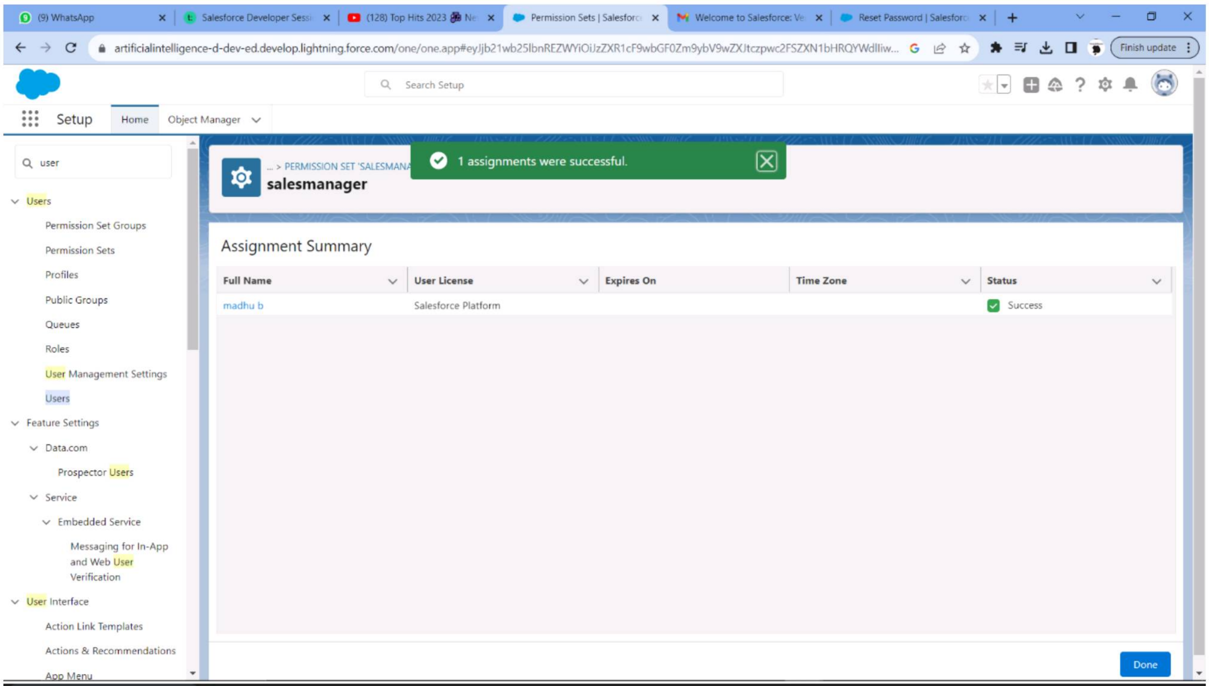
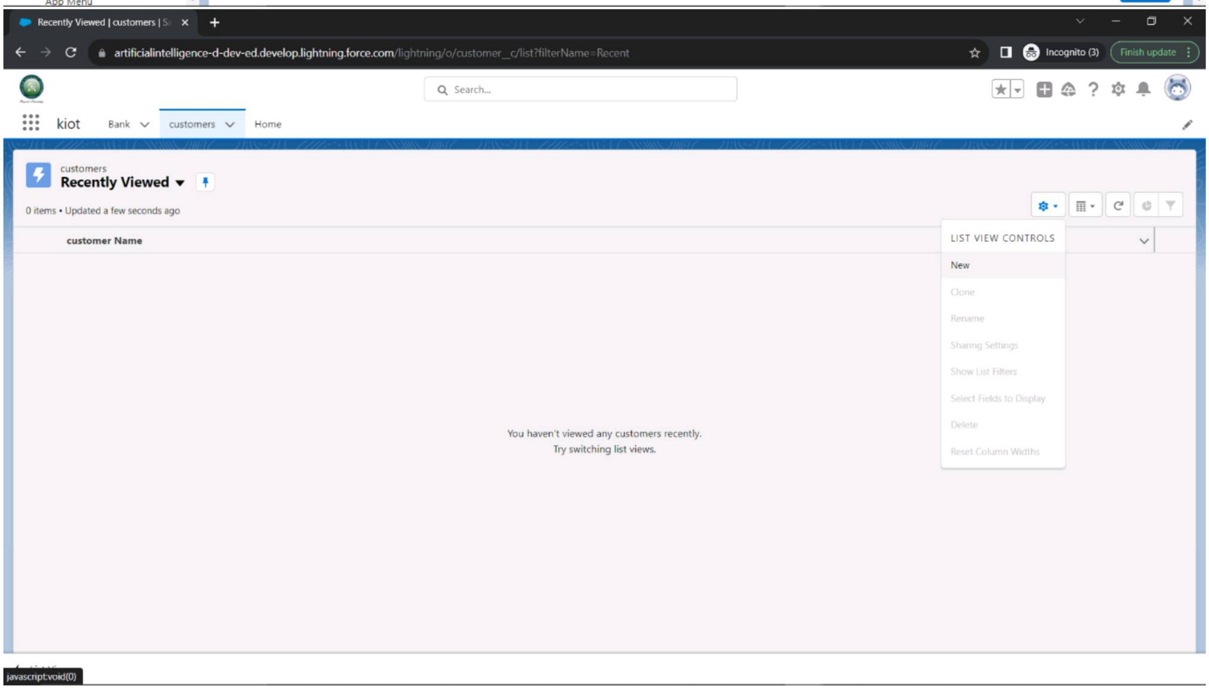
Permission Set
salesmanager
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
Bank
Bank
Save
Cancel
Tab Settings
Available
Visible
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Bank Name
Created By
Last Modified By


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


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008Phok/PermissionSetAssignment/new
Setup
Home
Object Manager
Select Users to Assign
All Users
1 item selected
Full Name
All...
Username
Role
Ac...
Profile
Amelia Ellington aelli amelia.ellington.146kxcp9oodih.d6cwpdcuo4wh.hnbdwmvwhwhq.wguctpr1dalv@gmail.com Force.com - App Subscription User
Chatter Expert Chatter chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com Chatter Free User
Diya Adanna dadan test_diya_pas.4w8bjybi9wik.tszgrgsbkxpx.3gi8ofovzwns.hl43bkzw6mea@gmail.com UMS User
GOPAL S GS kiot520@gmail.com System Administrator
Integration User integ integration@00d5j00000bcskkeab.com Analytics Cloud Integration User
madhu b mb 2k20csit@kiot.ac.in salesmanage
Security User sec insightssecurity@00d5j00000bcskkeab.com Analytics Cloud Security User
sowmiya bala sbala 2k21it@kiot.ac.in Manager
Cancel
Next


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008Phok/PermissionSetAssignment/new
Setup
Home
Object Manager
Select an Expiration Option For Assigned Users
No expiration date
Specify the expiration date
1 Day
1 Week
30 Days
60 Days
Custom Date
Time Zone
Select a time zone...
Selected Users
Full Name
Role
Profile
Active
User License
Expires On
madhu b salesmanage Salesforce Platform Never Expires
Cancel
Back
Assign

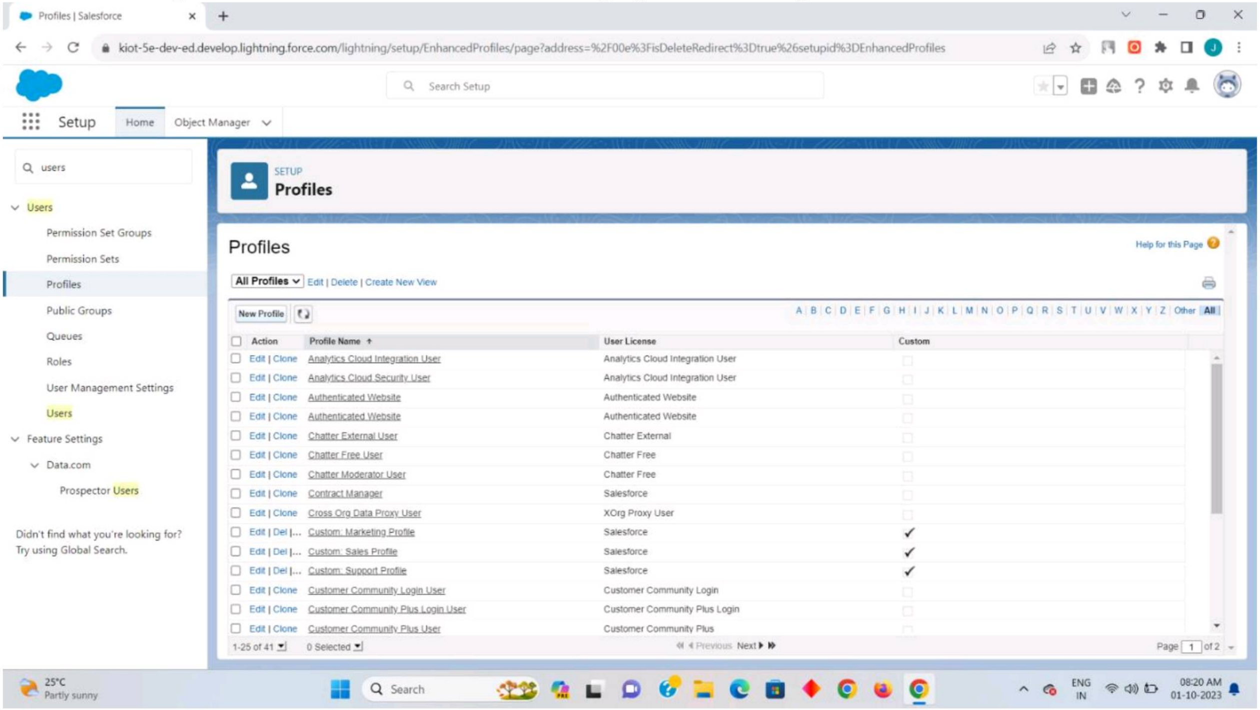

1 assignments were successful.
PERMISSION SET 'SALESMANA
salesmanager
Assignment Summary
Full Name
User License
Expires On
Time Zone
Status
madhu b
Salesforce Platform
Success
Setup
Home
Object Manager
Search Setup
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User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


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

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

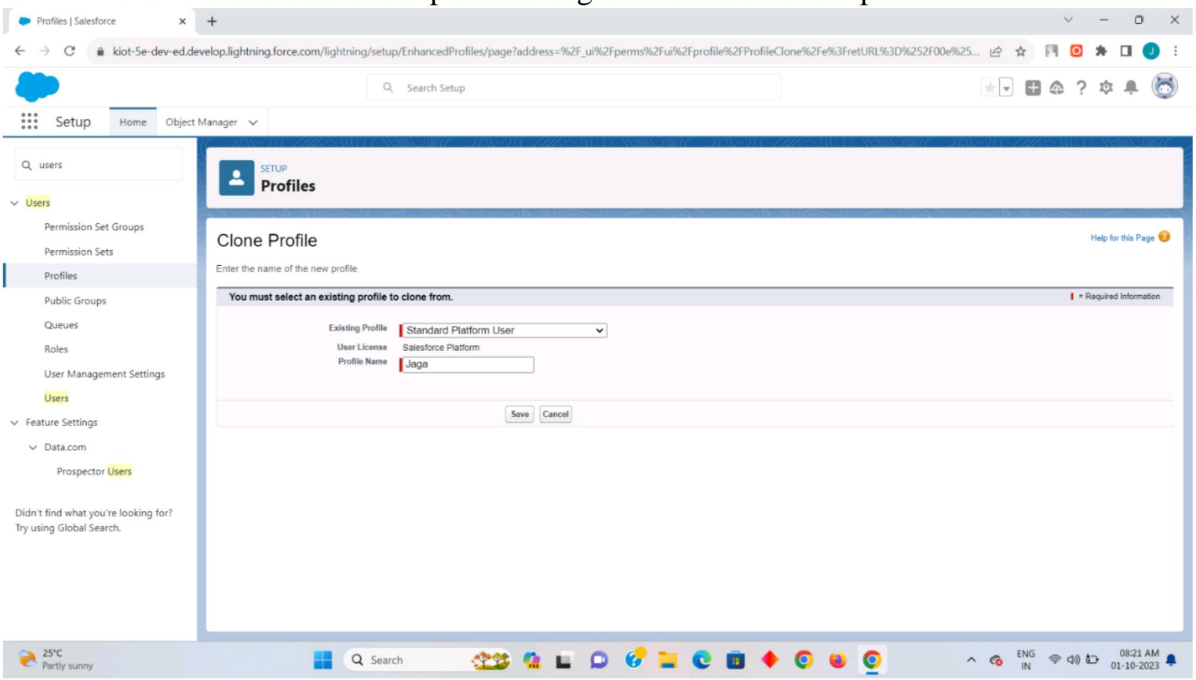
Solution:

Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per. <u>Setup-quick search[profile]</u>



Step 2:

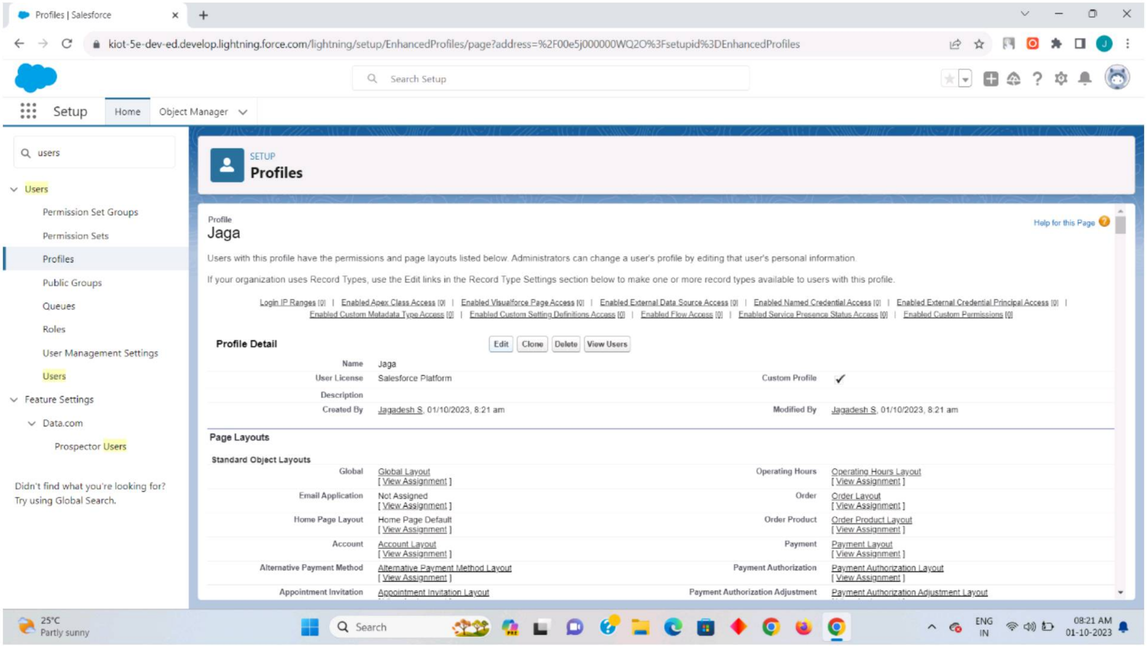
Click on the new to create a new profile along with the label and Api

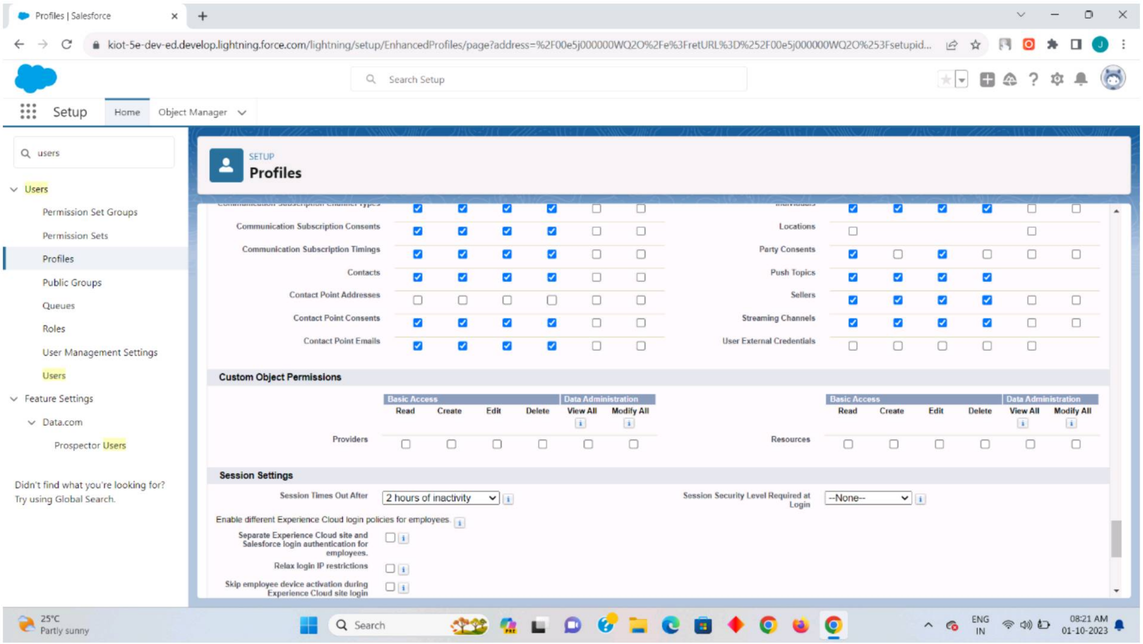


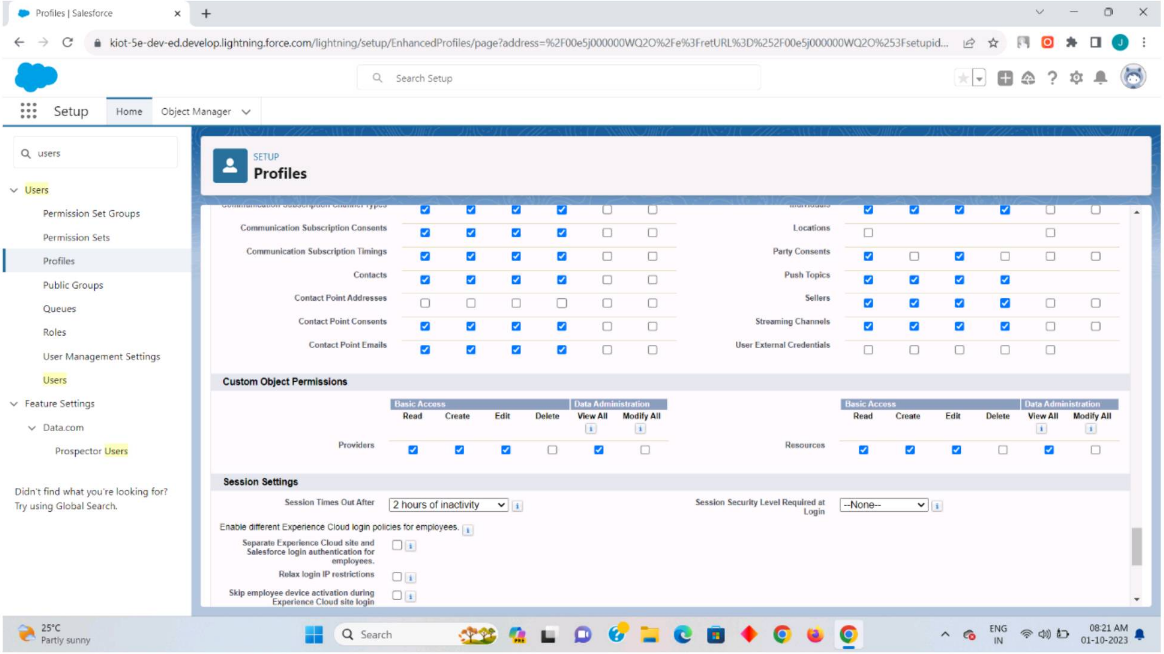
Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.

Step 3:

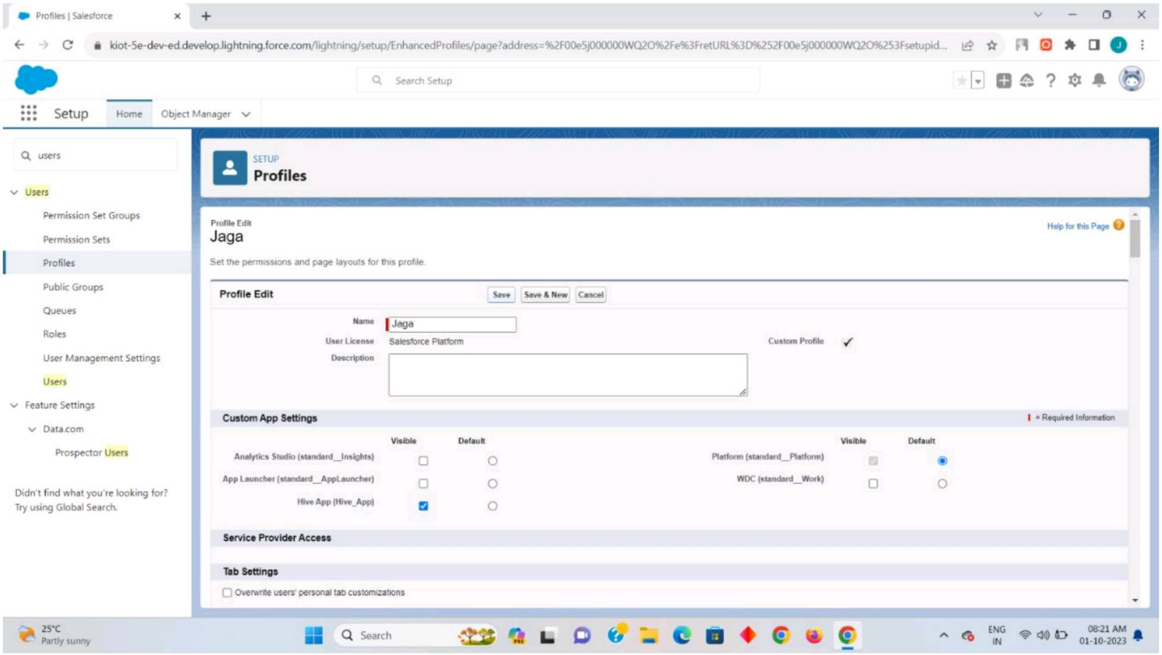
Now click on the edit and scroll down to custom object settings and enable the read,create,edit and view options. After that click on save.







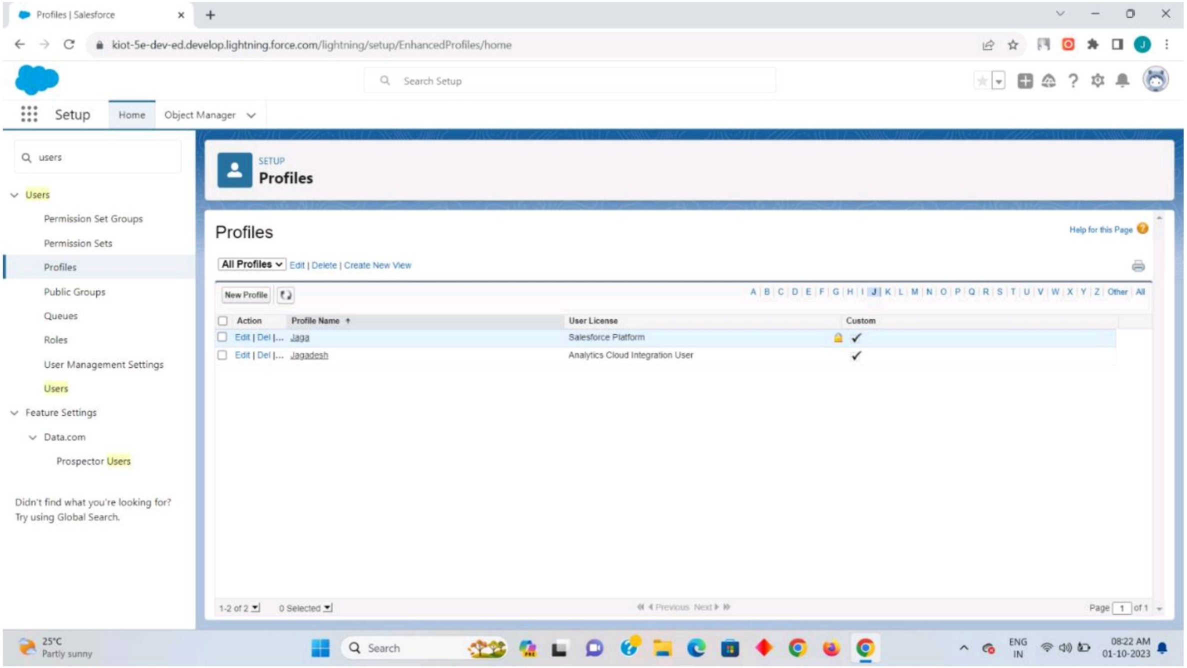
Profiles | Salesforce
Setup
Home
Object Manager
SETUP
Profiles
Custom Object Permissions
Providers
Resources
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--



Profiles | Salesforce
Setup
Home
Object Manager
SETUP
Profiles
Profile Edit
Jaga
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
Jaga
User License
Salesforce Platform
Custom Profile
Description
Custom App Settings
Service Provider Access
Tab Settings

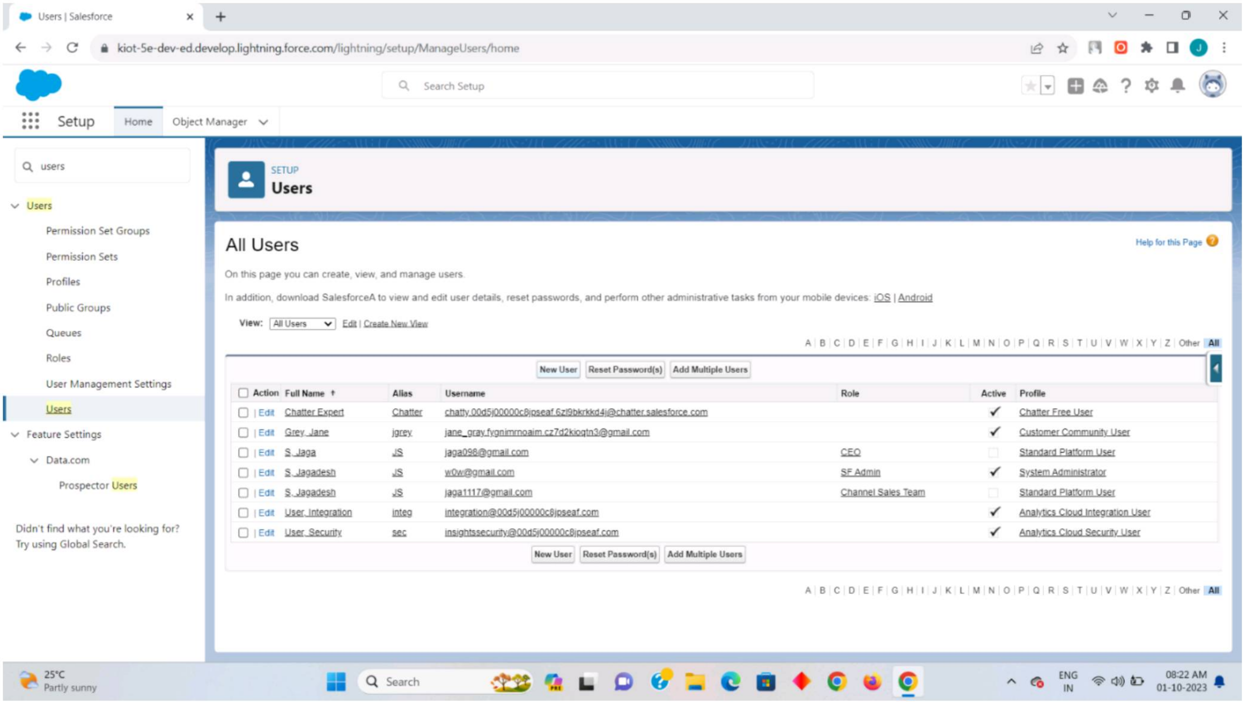
Step 4

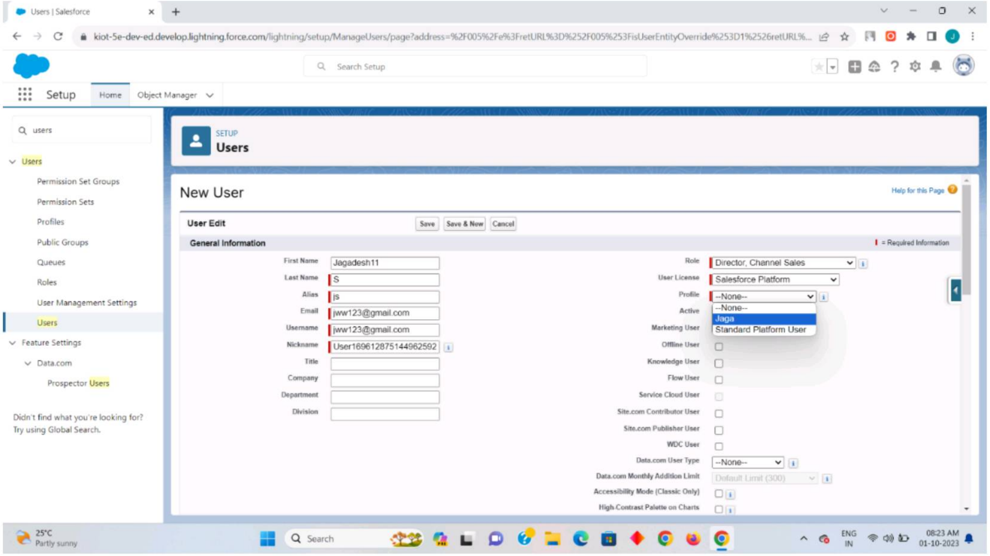
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it

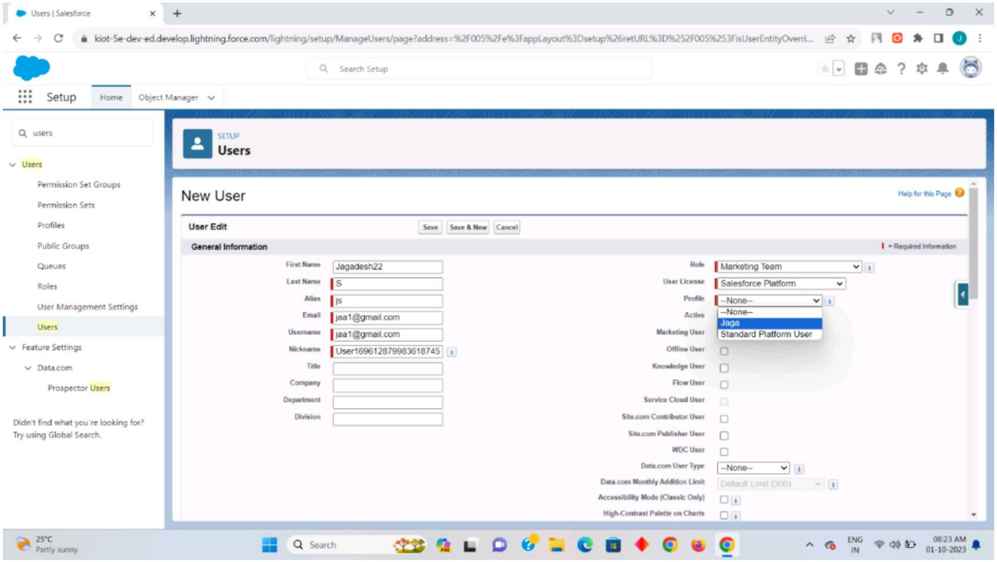


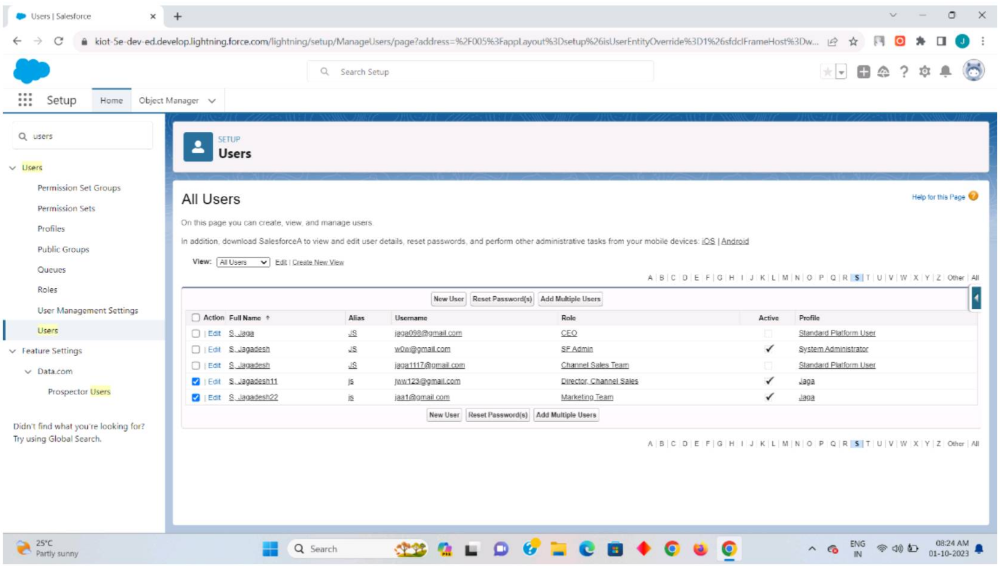
Step 5:

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.







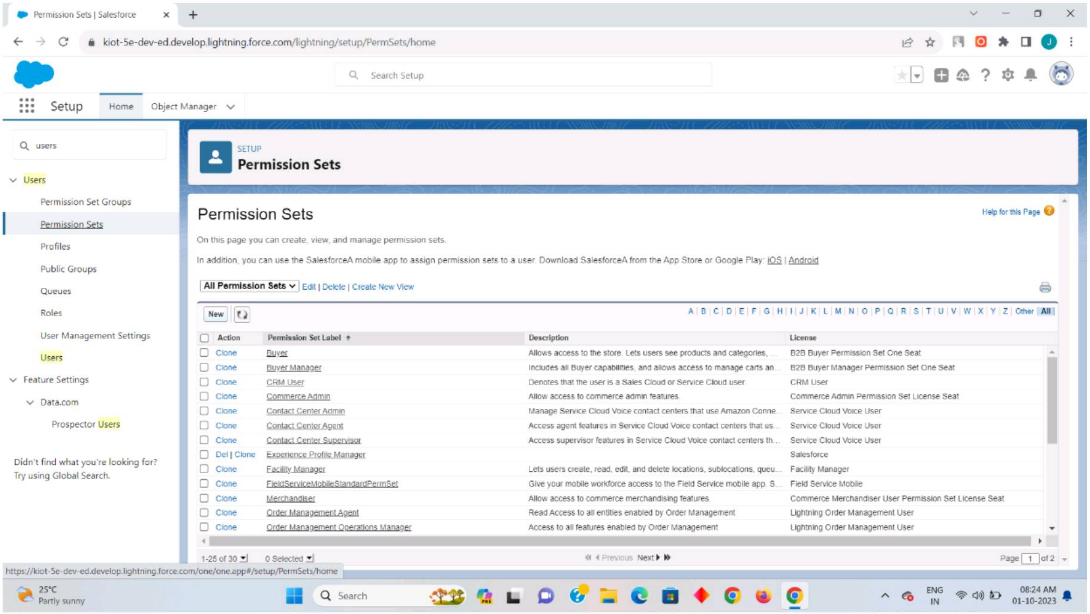


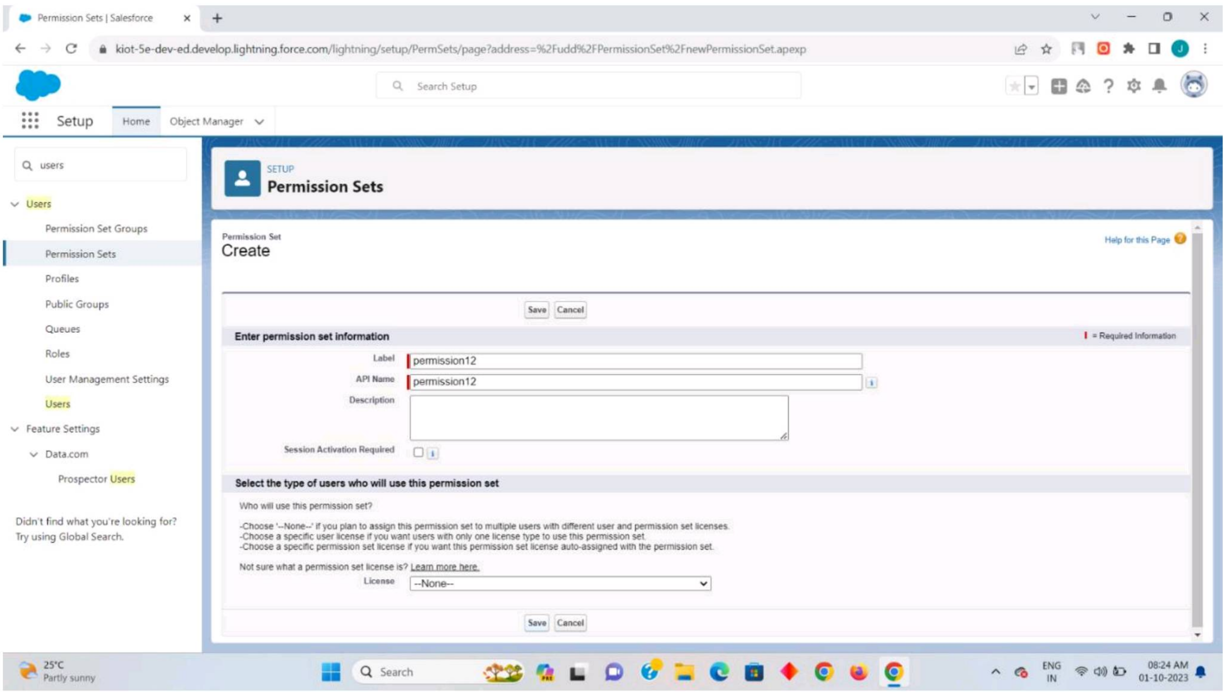
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

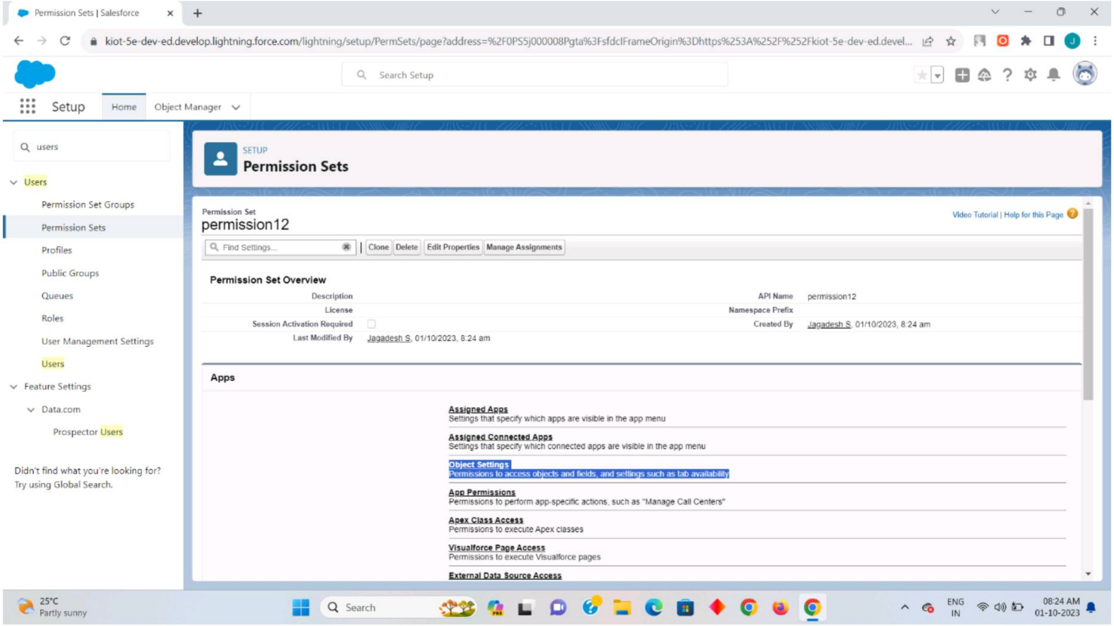
Step 6:

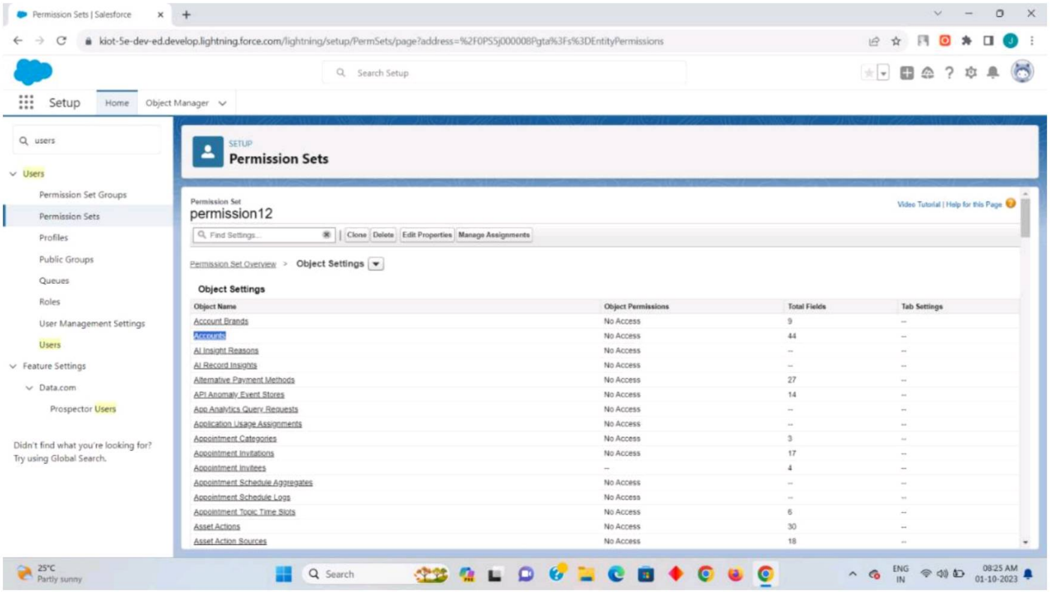
Now the two user as been created with the profle so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can created as

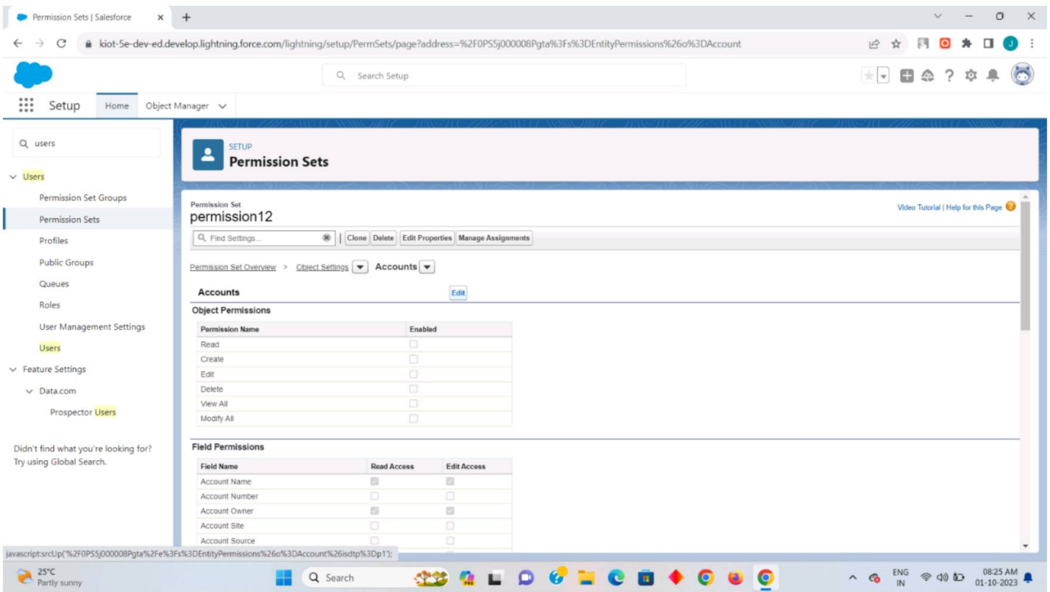
<u>setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.</u>





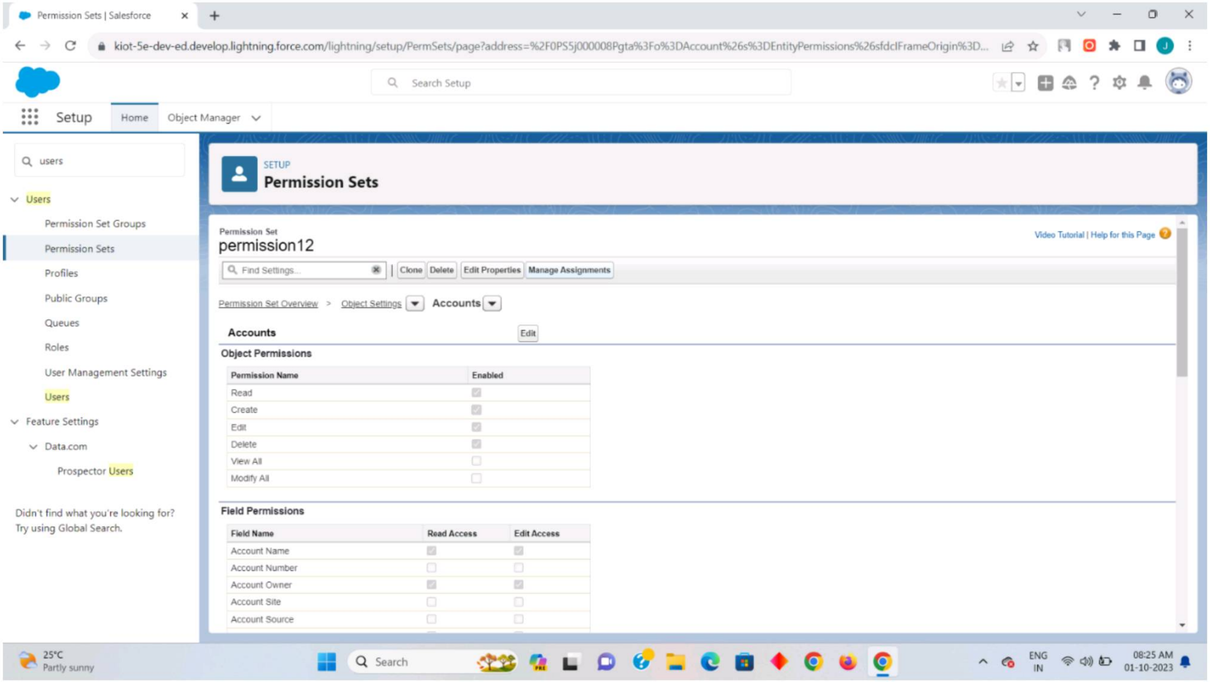

Permission Sets | Salesforce
Setup
Home
Object Manager
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Permission Sets
Permission Set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

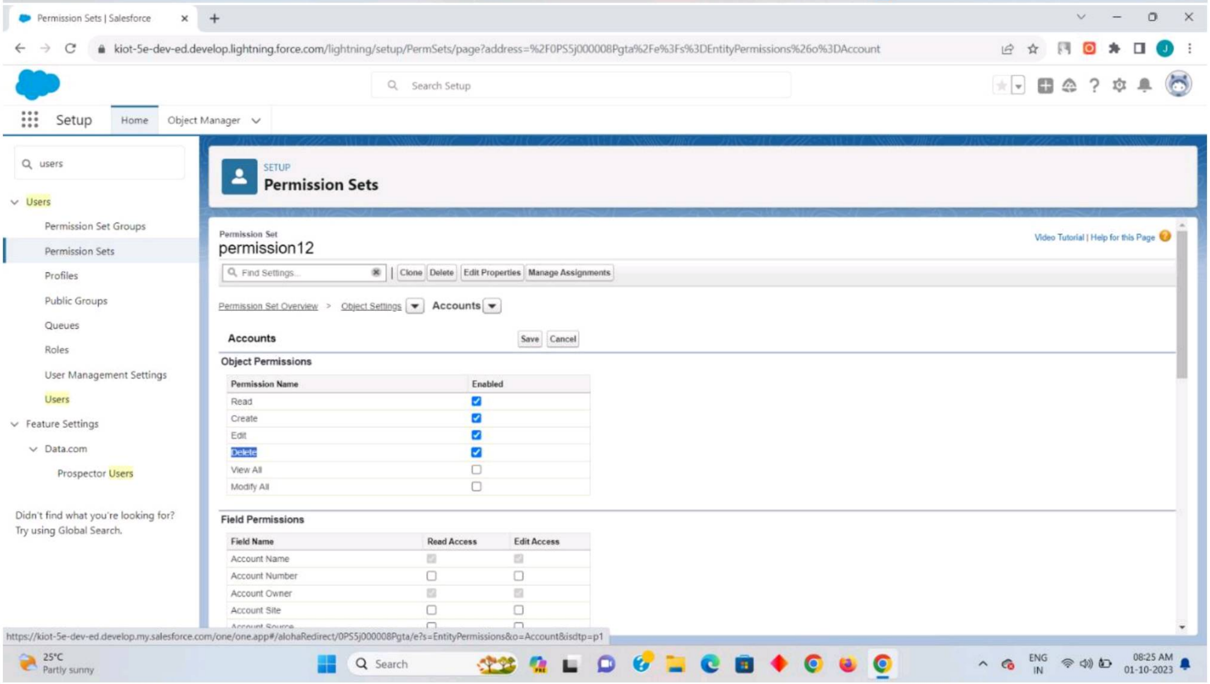

Permission Sets | Salesforce
SETUP
Permission Sets
Permission Set
permission12
Permission Set Overview
Object Settings
Object Name
Object Permissions
Total Fields
Tab Settings
Account Brands
Accounts
AI Insight Reasons
AI Record Insights
Alternative Payment Methods
API Anomaly Event Stores
App Analytics Query Requests
Application Usage Assignments
Appointment Categories
Appointment Invitations
Appointment Invitees
Appointment Schedule Aggregates
Appointment Schedule Logs
Appointment Topic Time Slots
Asset Actions
Asset Action Sources
No Access
08:25 AM
01-10-2023


Permission Sets | Salesforce
SETUP
Permission Sets
Permission Set
permission12
Permission Set Overview
Object Settings
Accounts
Edit
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Account Name
Account Number
Account Owner
Account Site
Account Source
08:25 AM
01-10-2023

Step 7:

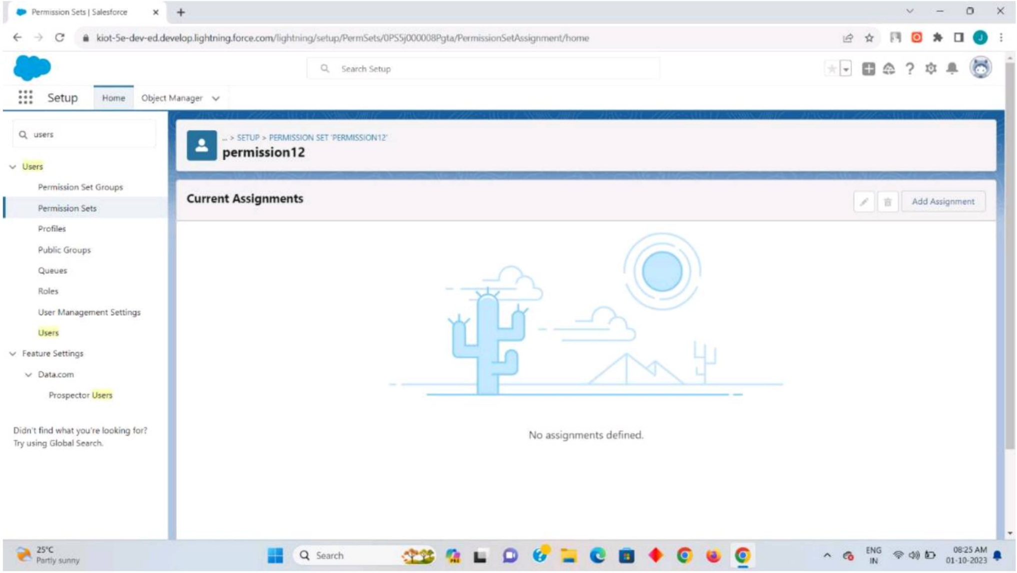
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

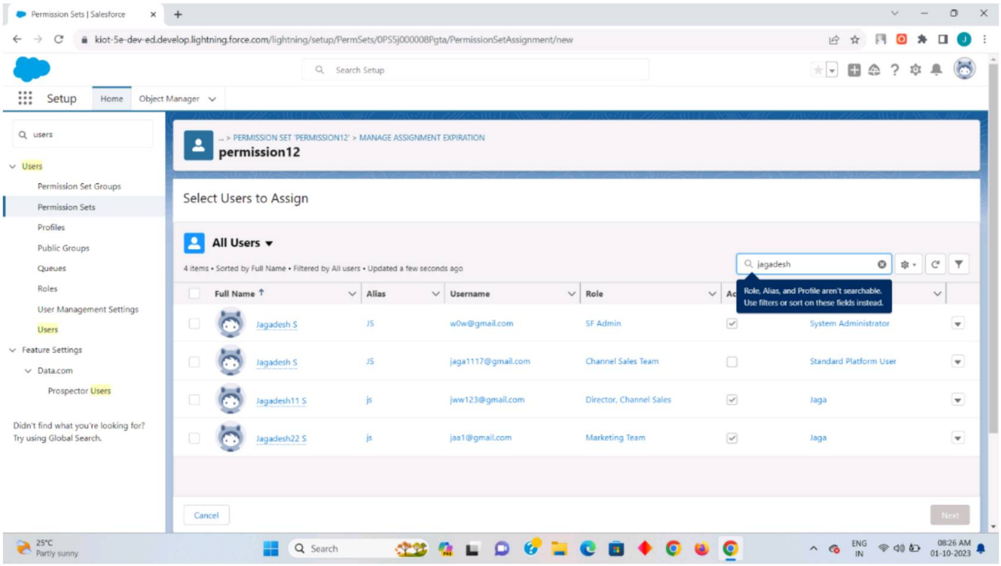


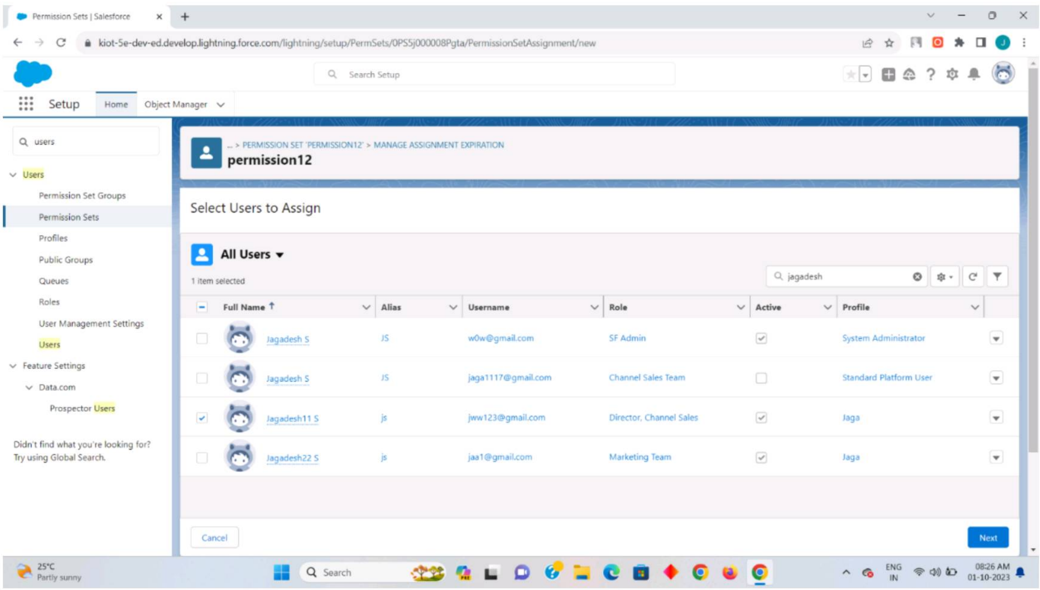


Step 8

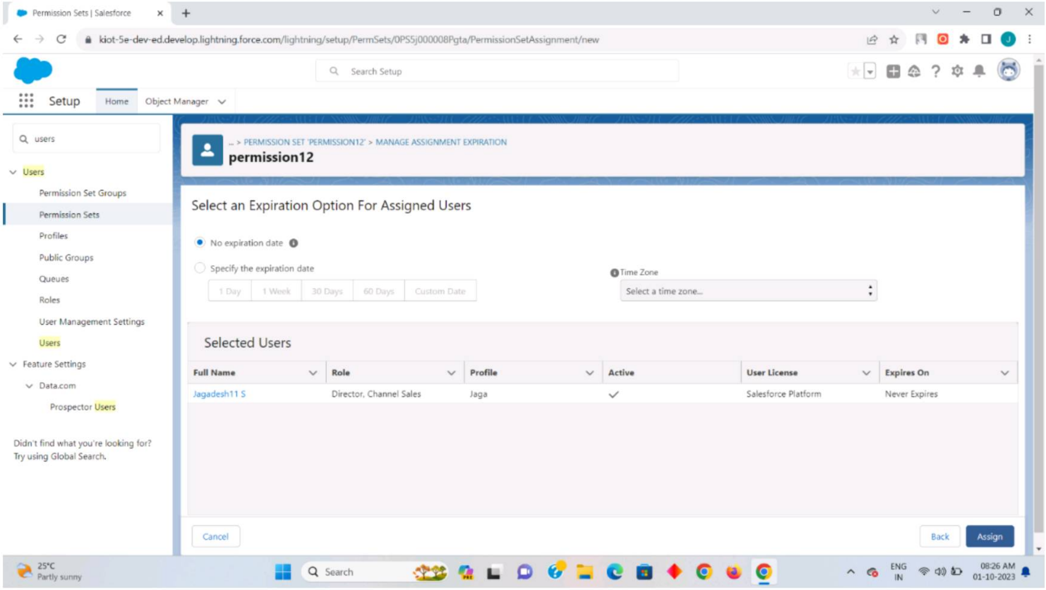
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



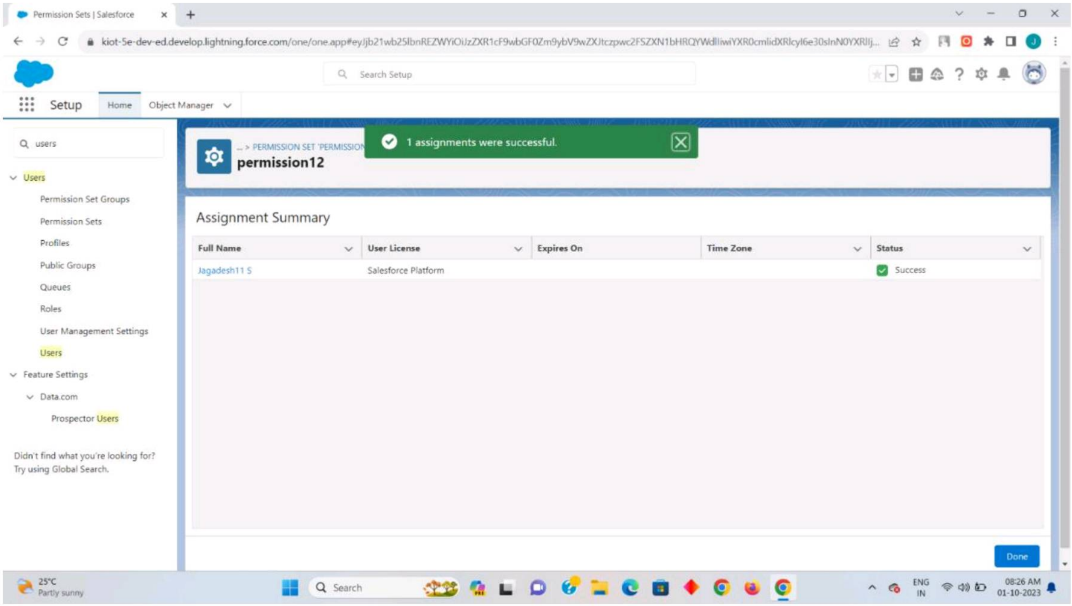




Click on next.



Now click on Assign.



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

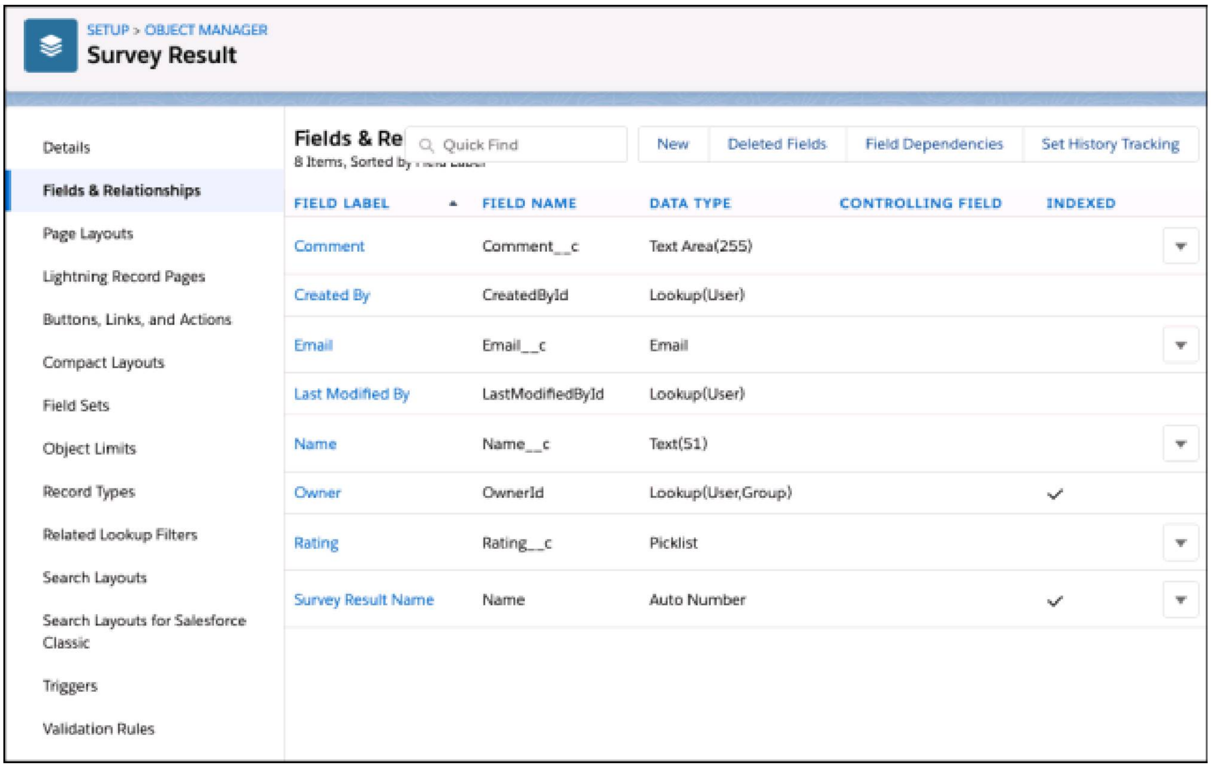
4.Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

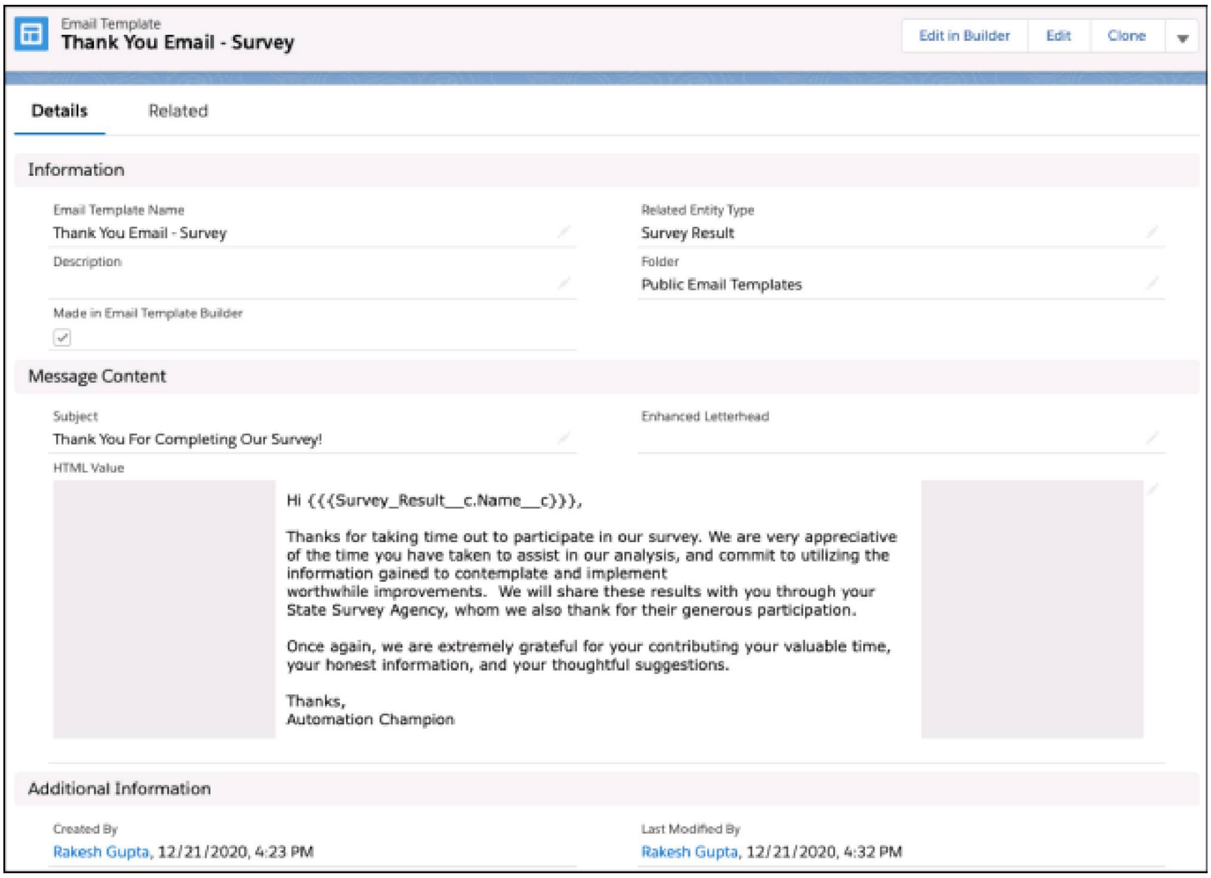
The next step is to create a custom object **Survey Result** and a few custom fields to store survey responses.

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



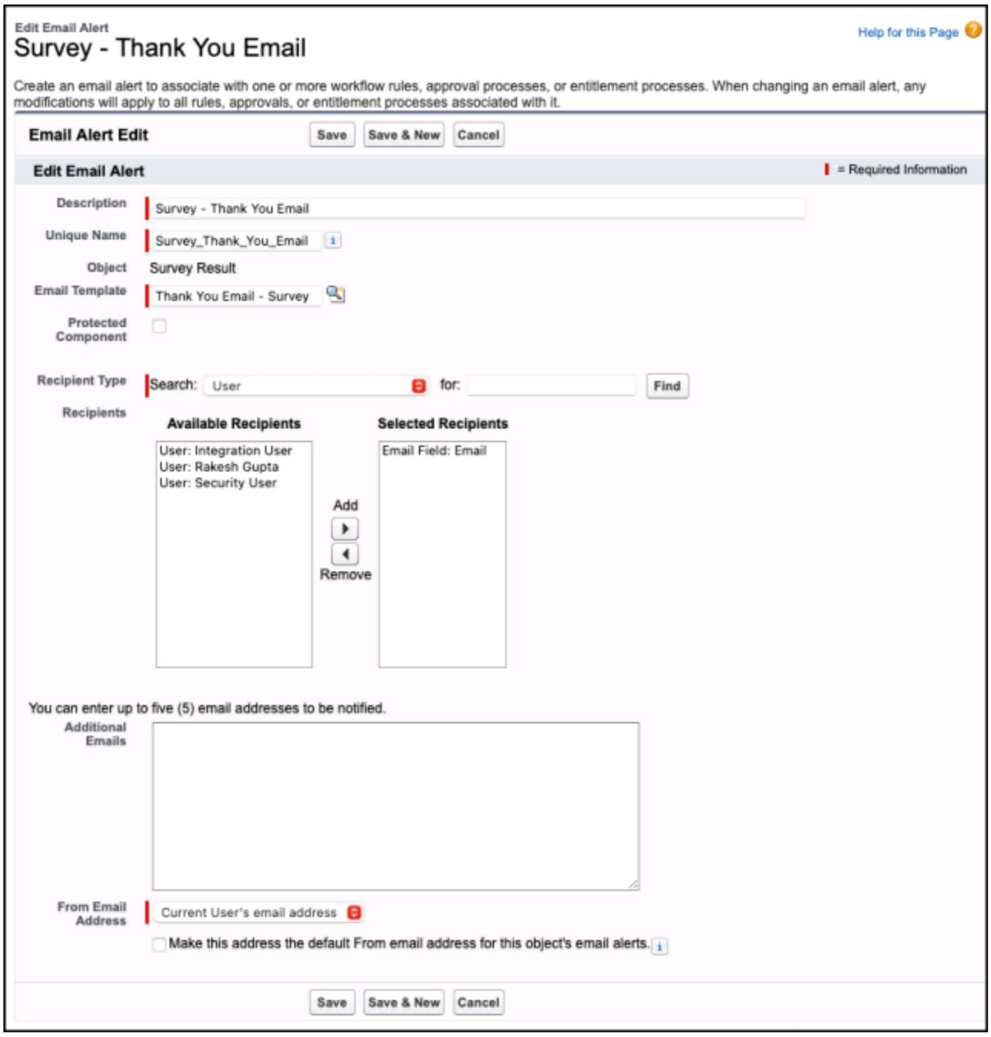
Step 2: Create a Thank You For Survey Lightning Email Template

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



Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.
3. Select **Email Alerts**, click on the **New Email Alert** button.
4. **Name** the **Email Alert** and click the Tab button. The **Unique Name** will populate.
5. For **Object** select **Survey Result.**
6. For the **Email Template** chooses **Lightning Email Template Thank You Email – Survey**.
7. For **Recipient Type** select **Email Field: Email.**
8. Click **Save**.



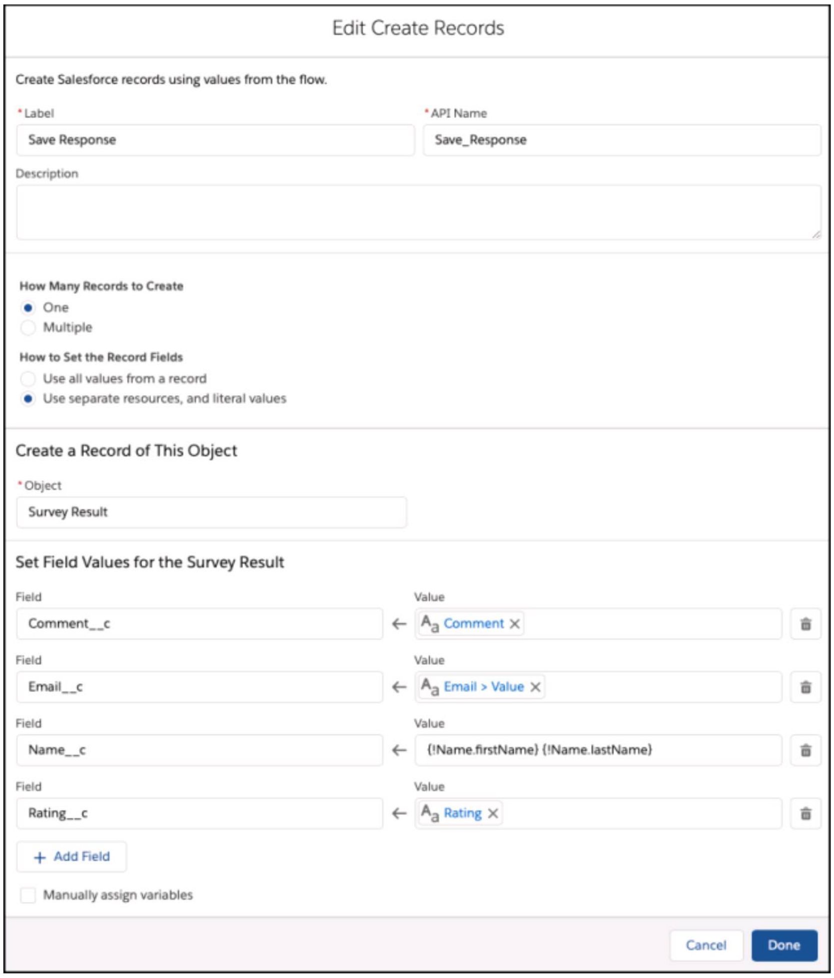
Step 4.1: Salesforce Flow — Create a Screen that Allow Users to Fill Survey

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

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

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

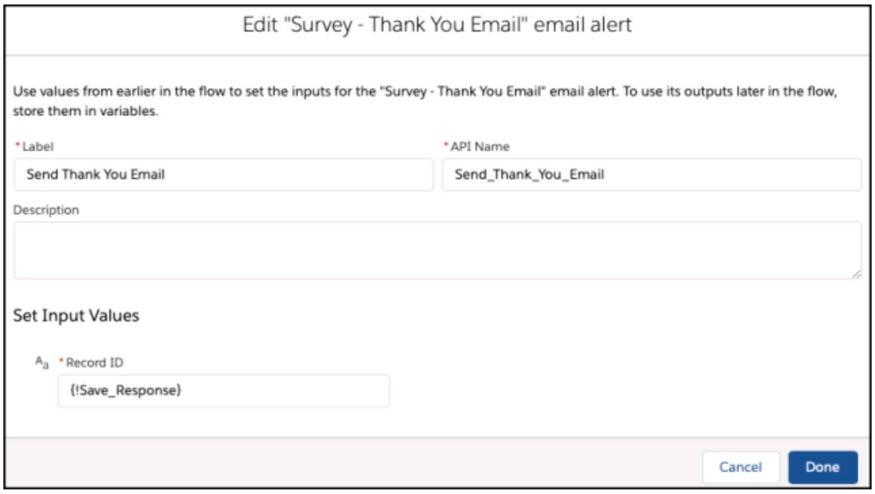
    2. Click **Add Row**
    3. Row 2:
        1. **Field: Email__c**
        2. **Value: {!Email.value}**
    4. Click **Add Row**
    5. Row 3:
        1. **Field: Name__c**
        2. **Value: {!Name.firstName} {!Name.lastName}**
    6. Click **Add Row**
    7. Row 3:
        1. **Field: Rating__c**
        2. **Value: {!Rating}**
7. Click **Done**.



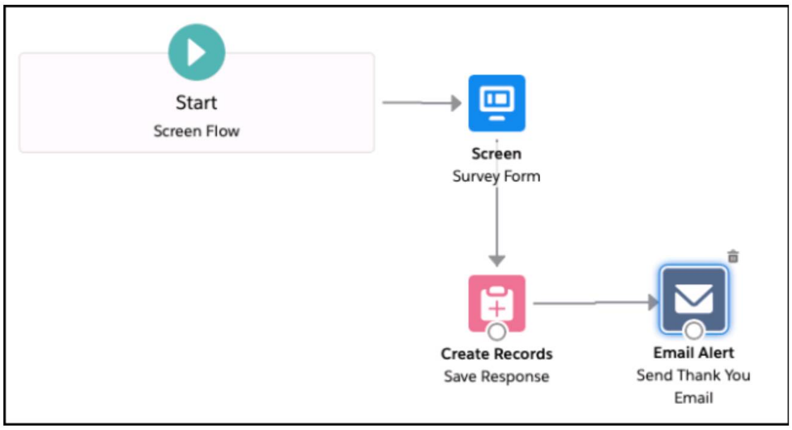
Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

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

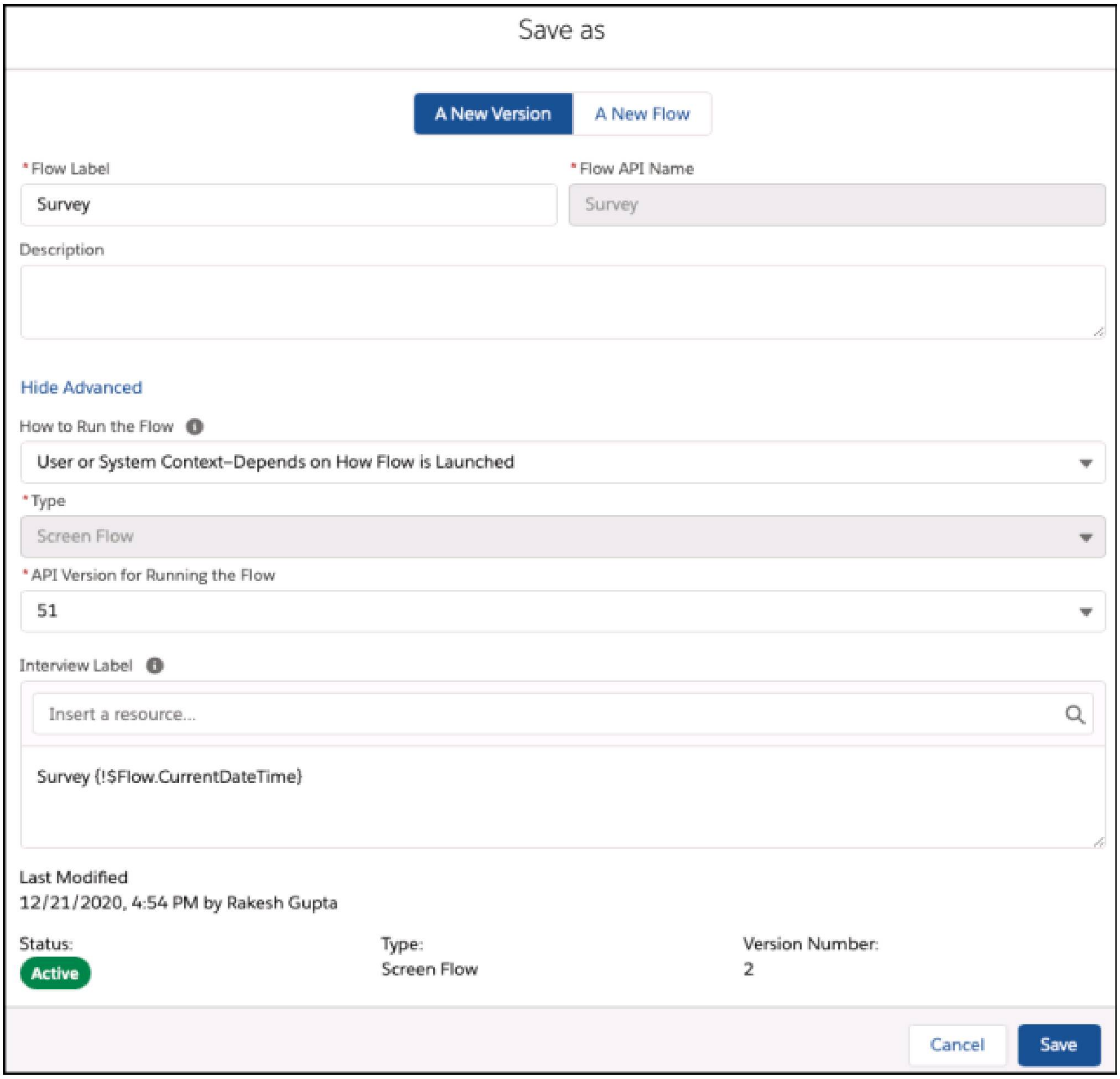
1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.
4. Clicks on the **Survey – Thank You Email** email alert.
5. Click **Done**.



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



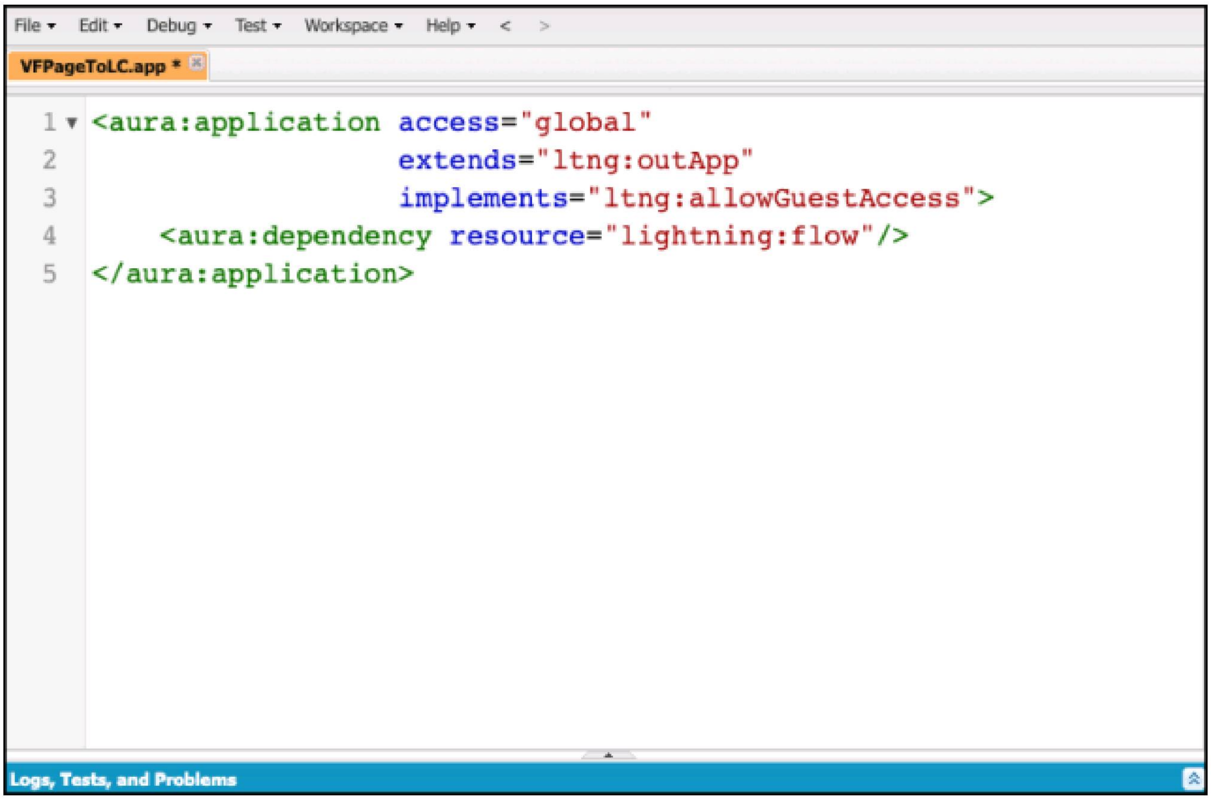
1. Click **Save**.
2. Enter **Flow Label** the **API Name** will auto-populate.
3. Click **Show Advanced**.
4. **How to Run the Flow**: **User or System Context—Depends on How Flow is Launched**
5. **Type**: **Screen Flow**
6. **API Version for Running the Flow**: **51**
7. **Interview Label**: **Survey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


Save as
A New Version
A New Flow
* Flow Label
Survey
* Flow API Name
Survey
Description
Hide Advanced
How to Run the Flow
User or System Context–Depends on How Flow is Launched
* Type
Screen Flow
* API Version for Running the Flow
51
Interview Label
Insert a resource...
Survey {!$Flow.CurrentDateTime}
Last Modified
12/21/2020, 4:54 PM by Rakesh Gupta
Status:
Active
Type:
Screen Flow
Version Number:
2
Cancel
Save

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

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

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

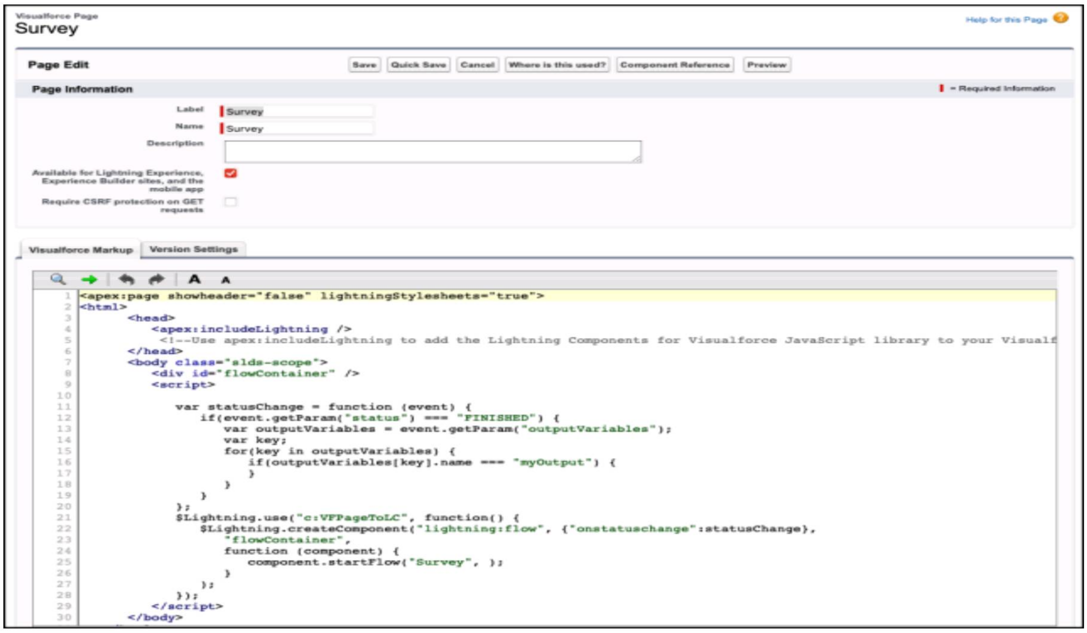


Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

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

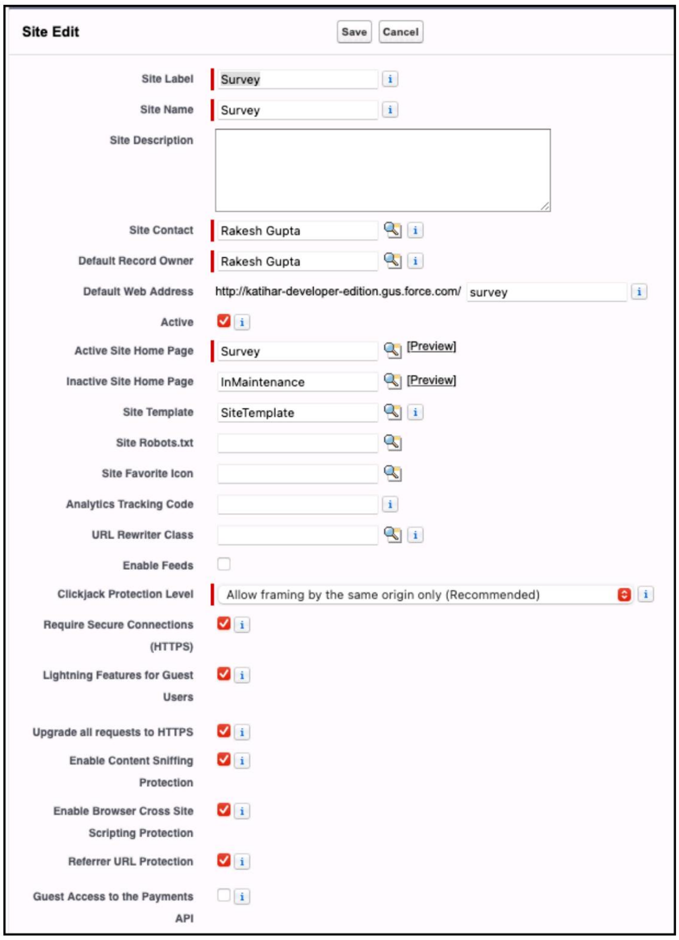
1. In the Quick Find box, type **Visualforce Pages**.
2. Clicks on the **New** button.
3. Copy code from **GitHub** and paste it into your visualforce page
4. Click **Save.**



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

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

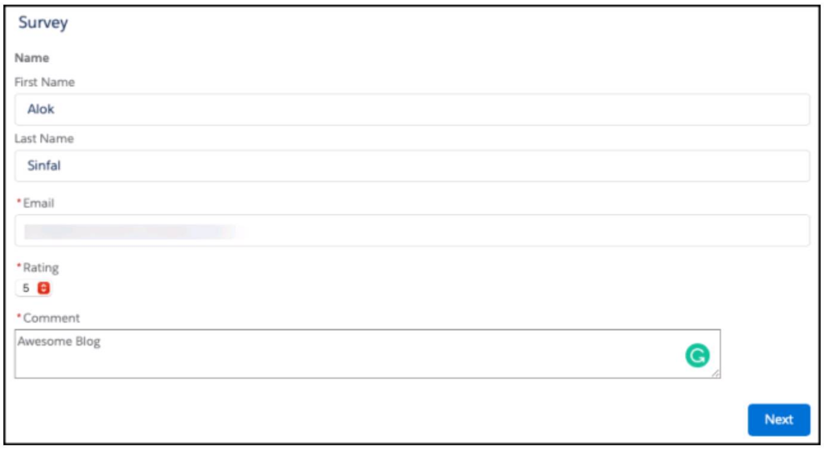
1. Click **Setup**.
2. In the Quick Find box, type **Sites**.
3. Clicks on the **New** button.
4. Fill the details as per the screenshot below:
5. Click **Save.**



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

Proof of Concept

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



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