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Salesforce Developer(Course)
Assignment no 1

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

Solution:

Step 1: Create Custom Objects

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

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

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

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main title is 'New Custom Object'. A message bar at the top indicates that permissions for the object are disabled by default. The 'Custom Object Definition Edit' section contains fields for 'Label' (department) and 'Plural Label' (departments), both with examples of 'Account' and 'Accounts'. There's also a checkbox for 'Starts with vowel sound'. The 'Object Name' field is set to 'department' with an example of 'Account'. A 'Description' text area is present. Under 'Context-Sensitive Help Setting', there are two options: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. 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 lists. It shows 'Record Name' as 'Department Name' with an example of 'Account Name' and 'Data Type' as 'Text'. The 'Optional Features' section has several checkboxes for reports, activities, field history, chatter groups, and licensing, all of which are unchecked. The 'Object Classification' section shows three checked checkboxes: 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section shows 'Allow Search' is unchecked. The 'Object Creation Options' section has two checkboxes: 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object', both of which are unchecked. 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 for the object 'CDepartment'. The left sidebar contains navigation links for Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main 'Details' tab is selected. The right panel displays various configuration settings for the CDepartment object, including:

- Description: CDepartment
- API Name: CDepartment__c
- Custom: ✓
- Singular Label: CDepartment
- Plural Label: CDepartments
- Enable Reports
- Track Activities
- Track Field History
- Deployment Status: Deployed
- Help Settings
- Standard salesforce.com Help Window

At the top right, there are 'Edit' and 'Delete' buttons.

The screenshot shows the Salesforce Setup interface for the object 'CDepartment', specifically the 'Fields & Relationships' section. A new relationship is being created, titled 'New Relationship'. The steps are as follows:

- Step 3. Enter the label and name for the lookup field**
Field Label: college
Field Name: college
Description:
Help Text:
- Child Relationship Name:** CDepartments
Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
 - 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.

At the bottom, there is a 'Lookup Filter' section.

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "CDepartment New Relationship" and "Step 2. Choose the related object". A dropdown menu shows "Related To college". Navigation buttons at the bottom include "Previous", "Next", and "Cancel".

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup categories. The main area is titled "CDepartment New Custom Field" and "Step 1. Choose the field type". It shows a "Data Type" section with options like None Selected, Auto Number, Formula, Roll-Up Summary, Lookup Relationship, Master-Detail Relationship, and External Lookup Relationship. The "Master-Detail Relationship" option is selected. A detailed description of this type is provided, mentioning it creates a parent-child relationship where ownership and sharing are determined by the master record. Navigation buttons at the bottom include "Next" and "Cancel".

Step 3: Create the Roll-Up Summary Field

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

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

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

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)		

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. The left sidebar includes 'User Interface' and 'Rename Tabs and Labels'. The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section has a 'New' button and a 'What Is This?' link. Under 'Custom Object Tabs', there is a table:

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

The screenshot shows the Salesforce Setup interface under the 'Object Manager' section for the 'college' object. The left sidebar lists various settings like 'Page Layouts', 'Buttons, Links, and Actions', and 'Validation Rules'. The main content area is titled 'New Custom Field' and is on 'Step 5. Add to page layouts'. It shows a table with field details and a checkbox for adding the field to specific page layouts. A note at the bottom says: '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.' Below the table is a checkbox for 'Add Field' and a dropdown for 'Page Layout Name'. At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

The screenshot shows the Salesforce Object Manager interface for creating a new custom field named "Total count" on the "college" object. The field is defined as a Roll-Up Summary type with the name "Total_count". The "Field-Level Security for Profile" section lists various user profiles with checkboxes for "Visible" and "Read Only" permissions. Most profiles have both checkboxes checked.

Field Label	Field Name	Visible	Read Only
Total count	Total_count	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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"/>
Contact Manager		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
customer		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Ann Subscription User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce Object Manager interface for creating a new custom field named "Total count" on the "college" object. The "Step 3. Define the summary calculation" section is active. It shows the "Master Object" as "college" and the "Summarized Object" as "CDepartments". Under "Select Roll-Up Type", the "COUNT" option is selected. The "Field to Aggregate" dropdown is set to "None". In the "Filter Criteria" section, the "All records should be included in the calculation" option is selected.

college

New Custom Field

Step 2. Enter the details Step 2 of 5

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

college

New Custom Field

Step 1. Choose the field type Step 1

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.

- This 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.

Master-Detail Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

True/False Allows users to select a True (checked) or False (unchecked) value.

Next Cancel

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'college'. On the right side of the header are various icons for account management. Below the header, the page title is 'college'. The main content area has a sidebar on the left with links like 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', etc. The main panel is titled 'Fields & Relationships' and shows a table with four items. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Step 4: Create a Lightning App

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

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. The main content area is titled 'New Custom Object Tab' and 'Step 2: Add to Profiles'. It displays a list of user profiles on the left and a grid of 'Tab Visibility' dropdowns on the right. The first dropdown in the grid is set to 'Default On'. The top right corner of the grid has a status message 'Step 2 of 3'.

Step 2: Add to Profiles

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

Help for this Page [?](#)

Previous Next Cancel

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main content area is titled 'New Custom Object Tab' and is divided into three steps. Step 1, 'Enter the Details', is currently active. It allows users to choose an existing custom object or create a new one. The 'Object' dropdown is set to 'college' and the 'Tab Style' dropdown is set to 'Jewel'. Step 2, 'Customize the Tab', is visible below it. Step 3, 'Add to Custom Apps', is also visible. A sidebar on the left provides navigation and search functionality.

The screenshot shows the 'Step 3. Add to Custom Apps' page. It lists various standard and custom apps available for adding to the new tab. Each app has a checkbox next to it labeled 'Include Tab', which is checked for all listed items. A note at the bottom states: 'Append tab to users' existing personal customizations'. The page includes 'Previous', 'Save', and 'Cancel' buttons at the bottom.

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

New Custom Object Tab

Step 1 of 3

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

Object	CDepartment
Tab Style	Lightning

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

Splash Page Custom Link: [None](#)

Enter a short description.

Description:

[Next](#) [Cancel](#)

Lightning Experience App Manager

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

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'User Interface' and 'Rename Tabs and Labels'. The main content area is titled 'Custom Tabs' and includes a help link. It displays sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Under 'Custom Object Tabs', there is a table with columns 'Action', 'Label', 'Tab Style', and 'Description'. The table contains five rows:

Action	Label	Tab Style	Description
Edit Del	Book1	Box	
Edit Del	CDepartments	Lightning	
Edit Del	college	Jewel	
Edit Del	Research_Proposal	Square	

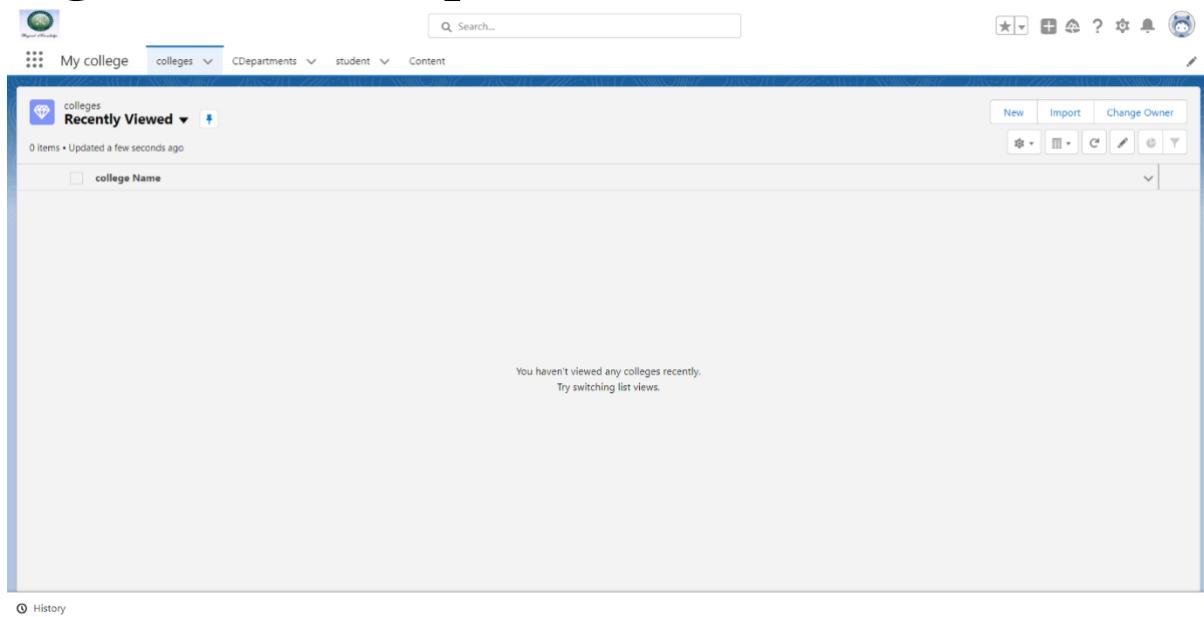
Below this, sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs' show that no items have been defined.

The screenshot shows the Salesforce Setup interface with the 'New Lightning App' page selected. The left sidebar has a search bar and navigation links for 'Salesforce', 'Data', 'Apps', 'Components', 'Lightning', 'Mobile', and 'Setup'. The main content area is titled 'App Details & Branding' and includes a help link. It displays sections for 'App Details' and 'App Branding'. The 'App Details' section contains fields for 'App Name' (My college), 'Developer Name' (My_college), and 'Description' (Enter a description...). The 'App Branding' section contains fields for 'Image' (a logo for 'Beyond Knowledge'), 'Primary Color Hex Value' (#217AC7), and a checkbox for 'Org Theme Options' (checked, with the sub-option 'Use the app's image and color instead of the org's custom theme'). A progress bar at the bottom indicates the process is at step 1 of 6, with a 'Next' button.

Conclusion:

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

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



The screenshot shows a Salesforce Lightning interface for creating a new college record. The page title is "New college". The "Information" section contains the following fields:

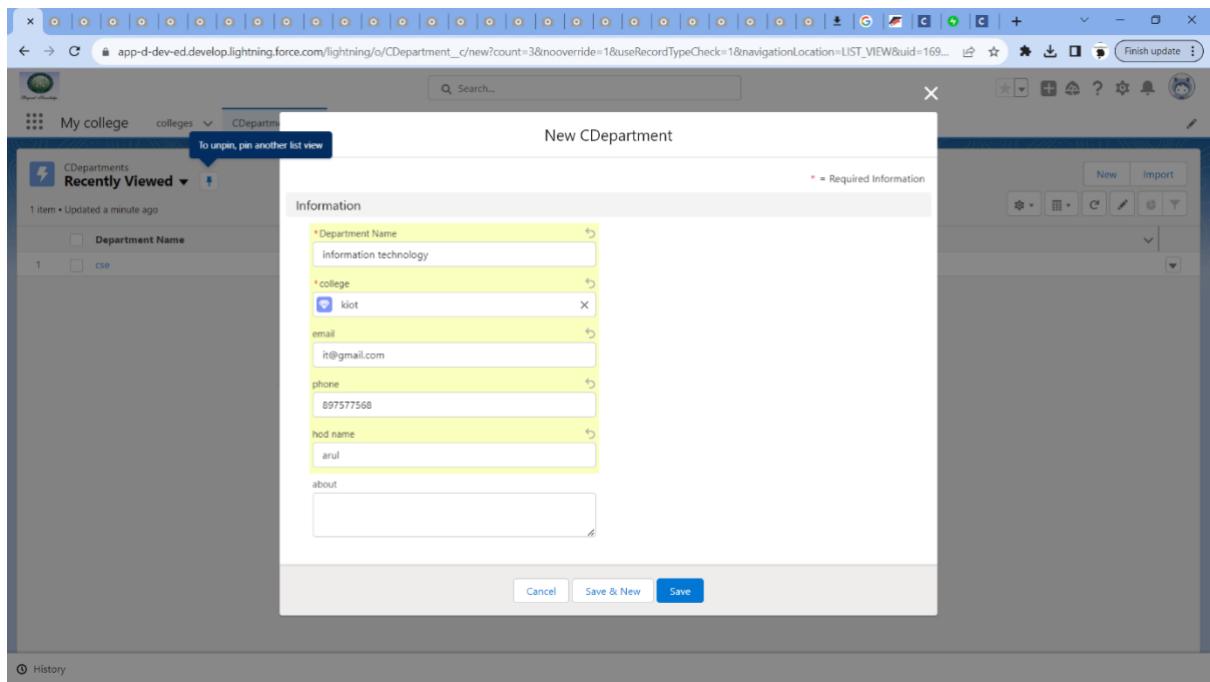
- college Name**: kiot (highlighted in yellow)
- phone**: 9087116402
- Email**: kiot@ac.in
- Location**
 - Latitude: 90
 - Longitude: 80

The "Owner" field shows "krishna s". At the bottom right of the form are buttons for "Cancel", "Save & New", and "Save".

The screenshot shows a Salesforce Lightning interface for managing CDepartments. The page title is "CDepartments". The list view shows one item:

- Department Name**: cse

At the top right of the list view are buttons for "New", "Import", and other actions.



My college colleges CDDepts student Content

CDDepartment 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 CDDepts student Content

College kiot

New Contact Edit New Opportunity

Related Details

college Name
kiot

Total count
1

phone
9087116402

Email
kiot@gmail.com

Location
90, 80

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

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

History

My college colleges CDDepts student Content

CDDepts 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

1 kiot

History

college Name: kiot

Total count: 2

phone: 9087116402

Email: kiot@gmail.com

Location: 90, 80

Owner: krishna s

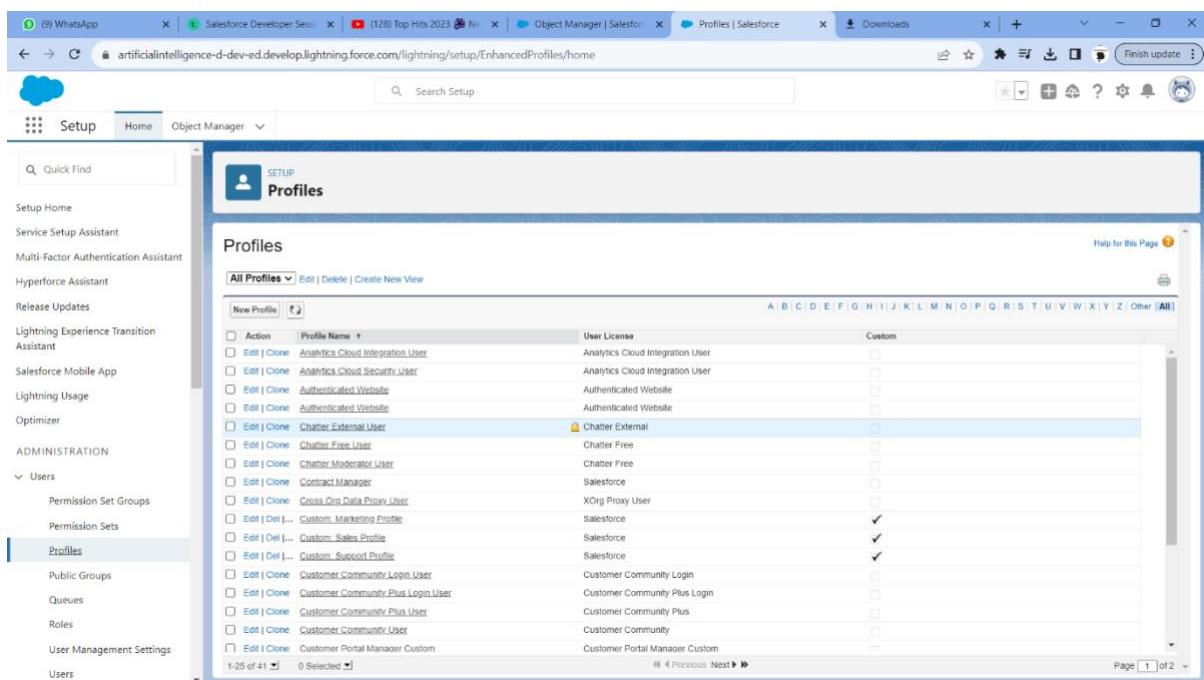
Created By: krishna s, 01/10/2023, 11:16 am

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

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lighting Usage, Optimizer, Administration (with sub-links for Users, Permission Set Groups, Permission Sets, and Profiles), and User Management Settings. The main content area displays a table titled 'Profiles' with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists various profiles such as 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom: Marketing Profile', 'Custom: Sales Profile', 'Custom: Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'Custom' column contains checkboxes, many of which are checked for specific profiles like 'Custom: Marketing Profile', 'Custom: Sales Profile', and 'Customer Community User'.

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fu%2Fprofile%2FProfileClone%2Fe%...| 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

Clone Profile

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

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | Setup | Home | Object Manager | Help for this Page

Clone Profile
Enter the name of the new profile.
You must select an existing profile to clone from.

Existing Profile: Standard Platform User
User License: Salesforce Platform
Profile Name: Manager

Save | Cancel

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

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | Setup | Home | Object Manager | Help for this Page

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.

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

Profile Detail
Name: Manager
User License: Salesforce Platform
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]
Email Application: Not Assigned [View Assignment]
Home Page Layout: Home Page Default [View Assignment]
Account: Account Layout [View Assignment]
Alternative Payment Method: Alternative Payment Method Layout [View Assignment]
Appointment Invitation: Appointment Invitation Layout [View Assignment]
Asset: Asset Layout [View Assignment]

Operating Hours: Operating Hours Layout [View Assignment]
Order: Order Layout [View Assignment]
Order Product: Order Product Layout [View Assignment]
Payment: Payment Layout [View Assignment]
Payment Authorization: Payment Authorization Layout [View Assignment]
Payment Authorization Adjustment: Payment Authorization Adjustment Layout [View Assignment]
Payment Gateway: Payment Gateway Layout [View Assignment]

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | + | - | Search Setup | Finish update

Manager

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

Analytics Studio (standard__Insights)	Visible <input type="checkbox"/>	Default <input type="radio"/>	Platform (standard__Platform)	Visible <input type="checkbox"/>	Default <input type="radio"/>
App Launcher (standard__AppLauncher)	Visible <input type="checkbox"/>	Default <input type="radio"/>	WDC (standard__Work)	Visible <input type="checkbox"/>	Default <input type="radio"/>
Not (not)	Visible <input checked="" type="checkbox"/>	Default <input type="radio"/>			

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings	Home <input type="radio"/> Default On	Learning <input type="radio"/> Default On
Accounts	Accounts <input type="radio"/> Default On	Libraries <input type="radio"/> Tab Hidden
Alert Settings	Alert Settings <input type="radio"/> Default On	Lightning Bolt Solutions <input type="radio"/> Default On

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | + | - | Search Setup | Finish update

Manager

Set the permissions and page layouts for this profile.

Communication Subscription Channel Types

Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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"/>
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"/>
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"/>

Individuals

Locations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>				

Custom Object Permissions

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

Enhancement Requests

Basic Access	Data Administration					
	Read	Create	Edit	Delete	View All	Modify All
	<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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | Finish update

Profiles

Custom Object Permissions

	Bank	customers	Enhancement Requests			
Basic Access	Read	Create	Edit	Delete	View All	Modify All
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Contact Point Consents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>
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"/>				

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

Custom Object Permissions

	Bank	customers	Enhancement Requests			
Basic Access	Read	Create	Edit	Delete	View All	Modify All
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Contact Point Consents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>
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"/>				

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 | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | Finish update

Profiles

Custom Object Permissions

	Bank	customers	Enhancement Requests			
Basic Access	Read	Create	Edit	Delete	View All	Modify All
Contact Point Addresses	<input type="checkbox"/>					
Contact Point Consents	<input type="checkbox"/>					
Contact Point Emails	<input type="checkbox"/>					
Sellers	<input type="checkbox"/>					
Streaming Channels	<input type="checkbox"/>					
User External Credentials	<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
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Maximum invalid login attempts	10
Lockout effective period	15 minutes

Custom Object Permissions

	Bank	customers	Enhancement Requests			
Basic Access	Read	Create	Edit	Delete	View All	Modify All
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Contact Point Consents	<input checked="" 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"/>
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"/>				

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 | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQbz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | Finish update

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home | Object Manager | Salesforce | Users | Salesforce | Downloads | + | - | Search Setup | Finish update

All Users

This page allows you to create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users | Edit | Create New | View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adriana_Diva	dadan	test_diva_pas_4w@bytb9wtk.tszgrg9kxpx_3qj8efoyzwms.h43hkze6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JMS User
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty_00d500000bc5skkeab.lo0hfwmgnote@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Ellington_Amelia	ash	amelia.ellington.1.46kxc9p9o0gh.d6cwydcu4wh.hnb0wmwvtheho.wguctor1dah@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S_GOPAL	GS	kot120@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@b00d500000bc5skkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@b00d500000bc5skkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv... | Users | Salesforce | Downloads

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: [] Last Name: [] Role: <None Specified>

Aliases: [] User License: [] Salesforce Integration

Email: [] Profile: [] Salesforce API Only System Integrations

Username: [] Active:

Nickname: [] Marketing User:

Title: [] Offline User:

Company: [] Knowledge User:

Department: [] Flow User:

Division: [] Service Cloud User:

Data.com User Type: [] Site.com Contributor User:

Data.com Monthly Addition Limit: Default Limit (300) Site.com Publisher User:

Accessibility Mode (Classic Only): High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling: Debug Mode:

Help for this Page

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv... | Users | Salesforce | Downloads

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmiya Last Name: bela Role: <None Specified>

Aliases: sbae User License: [] Salesforce Platform

Email: 2k20cse179@kiot.ac.in Profile: [] Manager

Username: 2k21it@kiot.ac.in Active:

Nickname: User169616771282564526 Marketing User:

Title: worker Offline User:

Company: kiot bank Knowledge User:

Department: Flow User:

Division: Service Cloud User:

Data.com User Type: [] Site.com Contributor User:

Data.com Monthly Addition Limit: Default Limit (300) Site.com Publisher User:

Accessibility Mode (Classic Only): High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling: Debug Mode:

Help for this Page

Screenshot of a web browser showing the Salesforce Setup interface and a Gmail inbox.

The top window is the Salesforce Setup interface, specifically the "Users" page. The user details for "Sowmya bala" are displayed, including her name, email (2k21it@kiot.ac.in), and various profile settings like Marketing User, Active, and Manager. The sidebar shows navigation links for Setup, Home, Object Manager, and various administrative modules.

The bottom window is a Gmail inbox. A new email from support@salesforce.com is visible, with the subject "Welcome to Salesforce!". The email body contains a "Verify Account" button, a URL (<https://artificialintelligence-d-dev-ed-develop.my.salesforce.com>), and a welcome message. The Gmail interface includes a sidebar with Mail, Chat, Spaces, Meet, and Drafts sections.

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

Username: 2k21it@kiot.ac.in

Password:

Log In

Remember me

Forgot Your Password?

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

WATCH ON DEMAND

AIDay

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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.salesforce.com
Settings Log Out

DISPLAY DENSITY

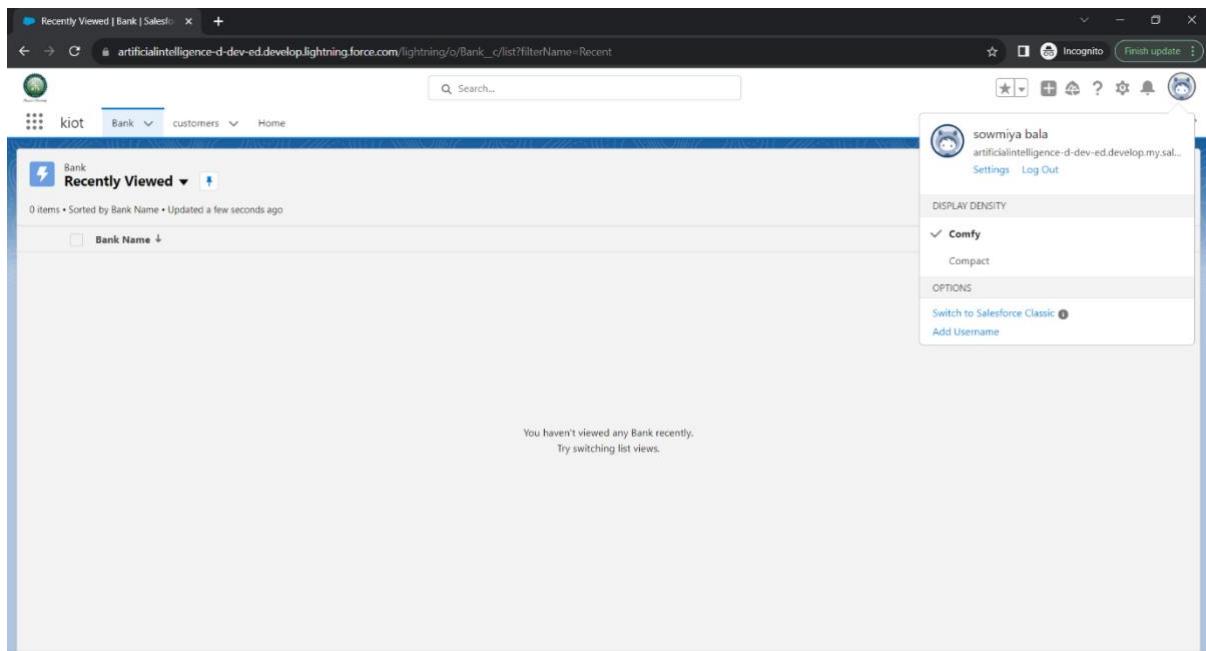
✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic

Add Username



New Bank | Salesforce +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=16...

Incognito Finish update

kiot Bank customers Home

Search...

Recently Viewed ▾

0 items • Updated a few seconds ago

Bank Name ↓

New Bank

* = Required Information

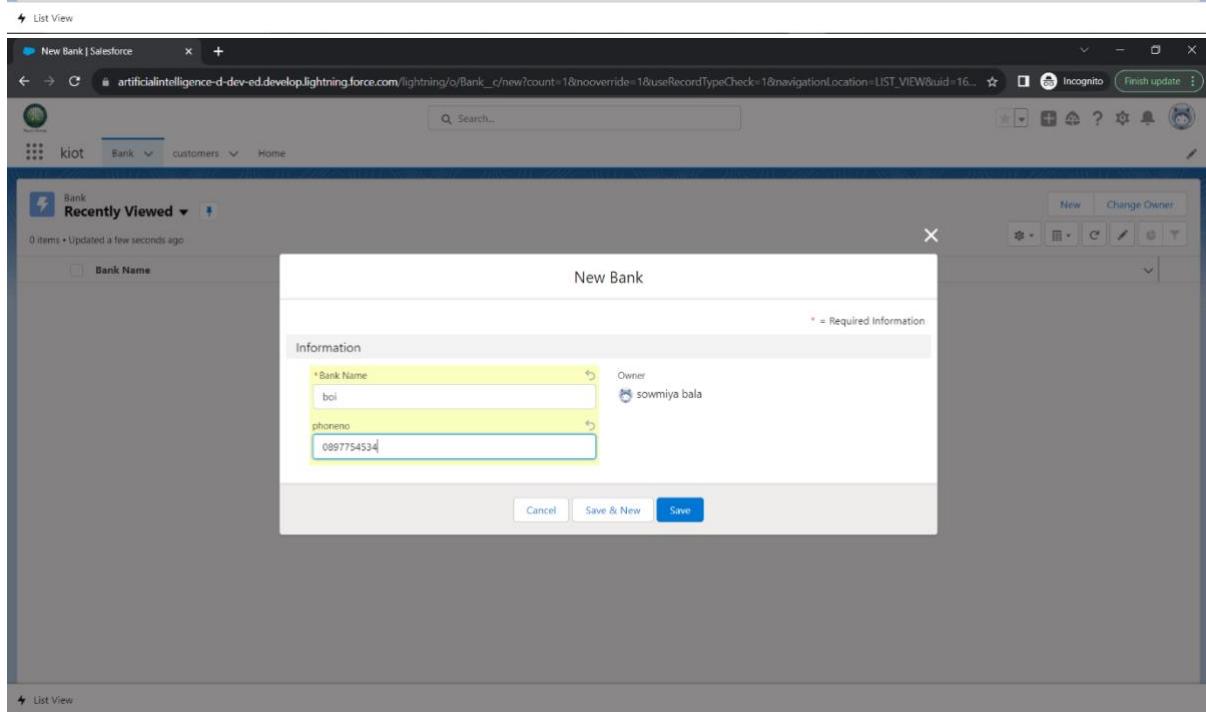
Information

* Bank Name: boi

Owner: sowmiya bala

Phone No.: 0897754534

Cancel Save & New Save



The screenshot displays two screenshots of the Salesforce Lightning Experience interface.

Top Screenshot: A 'New customer' modal window is open. It shows the 'Information' section with two required fields: 'customer Name' (containing 'madhu') and 'Bank' (containing 'boi'). Below the form are 'Cancel', 'Save & New', and 'Save' buttons. A note at the top right indicates that an asterisk (*) denotes required information.

Bottom Screenshot: The customer record has been created. The page title is 'madhu | customer | Salesforce'. A green success message at the top states 'customer "madhu" was created.' The record details are shown in the 'Details' tab, including the customer name 'madhu', bank 'boi', and creation information ('Created By: sowmiya bala, 01/10/2023, 7:17 pm' and 'Last Modified By: sowmiya bala, 01/10/2023, 7:17 pm'). Navigation links 'Related' and 'List View' are visible at the bottom.

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is titled "Setup" and includes sections for Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Update, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage Optimizer, and ADMINISTRATION. Under ADMINISTRATION, the "Users" section is expanded, showing sub-options: Permission Set Groups, Permission Sets, Profiles (which is currently selected), Public Groups, Queues, Roles, and User Management Settings. The main content area is titled "Profiles" and displays a table of existing profiles. The columns are "Action", "Profile Name", "User License", and "Custom". The profiles listed are: salesforce API Only System Integrations (User License: Salesforce Integration, Custom: unchecked), salesmanager (User License: Salesforce, Custom: checked), Silver Partner User (User License: Silver Partner, Custom: unchecked), Solution Manager (User License: Salesforce, Custom: unchecked), Standard Platform User (User License: Salesforce Platform, Custom: unchecked), Standard User (User License: Salesforce, Custom: unchecked), and System Administrator (User License: Salesforce, Custom: unchecked). At the bottom of the table, there are navigation links for "1 of 7" and "0 Selected", along with "4 Previous" and "Next > 10" buttons. The bottom right corner shows "Page 1 of 1".

The screenshot shows the Salesforce Setup Home page. The left sidebar is titled "Setup" and includes sections 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", and "Optimizer". Under "ADMINISTRATION", there are sections for "Users" (with "Profiles" selected), "Permission Set Groups", "Permission Sets", "Public Groups", "Queues", "Roles", "User Management Settings", and "Users". The main content area is titled "SETUP Profiles" and shows a "Clone Profile" dialog. It prompts the user to "Enter the name of the new profile." Below this, a note says "You must select an existing profile to clone from." A table lists "Existing Profile" as "Standard Platform User", "User License" as "Salesforce Platform", and "Profile Name" as "Salesmanager". At the bottom of the dialog are "Save" and "Cancel" buttons.

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

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

Profile salesmanage

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

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

Login IP Range (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Page Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail

Name	salesmanage	User License	Salesforce Platform	Description	Created By	Modified By
Custom Profile	<input checked="" type="checkbox"/>				GQPAL_S_01/10/2023, 7:19 pm	GQPAL_S_01/10/2023, 7:19 pm

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 Adjustment Layout [View Assignment]
Asset	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
	Asset Layout [View Assignment]	Payment Gateway Layout [View Assignment]

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

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

Profile Edit salesmanage

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On
Learning	<input checked="" type="radio"/>
Threads	<input type="radio"/>

Salesforce Developer Session 2

Profiles | Salesforce

Welcome to Salesforce: Verify

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	View All	Modify All		Basic Access	Create	Edit	Delete	View All	Modify All
Contact Point Emails	<input checked="" type="checkbox"/>												
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
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

Obfuscate secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Salesforce Developer Session 2

Profiles | Salesforce

Welcome to Salesforce: Verify

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

Session Settings

Session Times Out After: 2 hours of inactivity

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Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obfuscate secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save

Save & New

Cancel

Salesforce Developer Session 2

Users | Salesforce

Welcome to Salesforce: Verify your...

Finish update

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

New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role <None Specified>

User License Salesforce Integration

Profile Salesforce API Only System Integrations

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type -None-

Data.com Monthly Addition Limit Default Limit (300)

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Salesforce Developer Session 2

Users | Salesforce

Welcome to Salesforce: Verify your...

Finish update

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

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Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

New User

User Edit Save Save & New Cancel

General Information

First Name madhu

Last Name b

Alias mb

Email 2k20cse179@kiot.ac.in

Username 2k20cse179@kiot.ac.in

Nickname User169616842428654192

Title worker

Company kiot bank

Department Sales

Division

Role <None Specified>

User License Salesforce Platform

Profile salesmanager

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

The screenshot shows the Salesforce Setup interface with the 'User Management Settings' section selected under 'User'. The main content area displays the 'Users' configuration page. Key fields include:

- Mailing Address:** Street (4/194, aryampalayam, Uthmasolapuram ..), City (SALEM), Zip/Postal Code (636308), State/Province (TAMIL NADU), Country (India).
- Single Sign On Information:** Federation ID (empty).
- Locale Settings:** Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), Language (English).
- Approver Settings:** Delegated Approver (empty), Manager (empty), Receive Approval Request Emails (Only if I am an approver), Generate new password and notify user immediately (checked).

Buttons at the bottom: Save, Save & New, Cancel.

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

The screenshot shows the Salesforce Setup interface with the 'User Management Settings' section selected under 'User'. The main content area displays the 'Users' configuration page. Key fields include:

- Mailing Address:** Street (4/194, aryampalayam, Uthmasolapuram ..), City (SALEM), Zip/Postal Code (636308), State/Province (TAMIL NADU), Country (India).
- Single Sign On Information:** Federation ID (empty).
- Locale Settings:** Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), Language (English).
- Approver Settings:** Delegated Approver (empty), Manager (empty), Receive Approval Request Emails (Only if I am an approver), Generate new password and notify user immediately (checked).

Buttons at the bottom: Save, Save & New, Cancel.

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

User Detail

Name	madhu b	Role	Salesforce Platform
Alias	mb	User License	Active
Email	2k20csit179@kiot.ac.in [Verify]	Profile	salesmanag
Username	2k20csit@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User16961604242805419206	Offline User	<input type="checkbox"/>
Title	worker	Knowledge User	<input type="checkbox"/>
Company	kiot bank	Flow User	<input type="checkbox"/>
Department	Sales	Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	41/104, aruppampalayam, umamasolapuram .. ParaiKKadu , salem- 603608 SALEM 633608 TAMIL NADU	Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	VIEW
Language	English	Data.com User Type	<input type="checkbox"/>
Delegated Approver	Manager	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

Gmail | Search in mail | Active | 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>

Again, welcome to Salesforce!

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Salesforce.com, Inc. The Landmark at One Market, Suite 300, San Francisco, CA, 94105, United States

Reply | Forward

Change Your Password | Salesforce

artificialintelligence-d-dev-ed.develop.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupId=ChangePa... Incognito (3) Finish update



Change Your Password

Enter a new password for 2k20csit@kiot.ac.in. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
india

Change Password

Password was last changed on 01/10/2023, 7:24 pm.

Recently Viewed | Bank | Salesforce

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

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 | [S](#) +

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

Incognito (3) [Finish update](#)

kiot Bank customers Home

Search...

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

WhatsApp Salesforce Developer Session 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 Home Object Manager

Search Setup

Q 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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Action Link Templates

Actions & Recommendations

SETUP

Permission Sets

Help for this Page

All Permission Sets [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Access to activity	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	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 Conne...	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...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Salesforce
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app. ...	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Limited access to Order Management features for Self Service	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper		

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

1-25 of 29 0 Selected [4 Previous](#) [Next 10](#) 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:

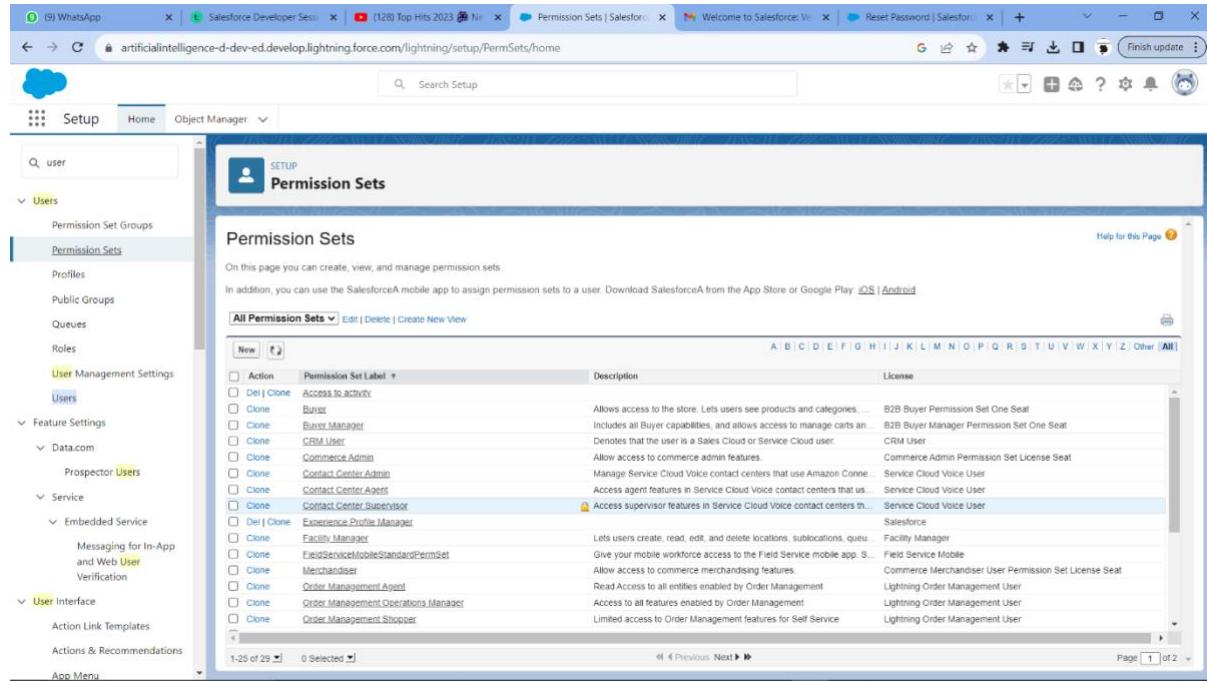
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

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 access each other's records.



The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar is collapsed, and the main area displays a table of permission sets. The table has columns for Action, Permission Set Label, Description, and License. The 'Permission Set Label' column lists various roles and profiles, such as 'Access_to_activity', 'Buyer', 'Buyer_Manager', 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"/>	Clone	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Clone	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Clone	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Agent	Access supervisor features in Service Cloud Voice contact centers th...	Salesforce
<input type="checkbox"/>	Contact_Center_Supervisor	Lets users create, read, edit, and delete locations, sublocations, queu...	Facility Manager
<input type="checkbox"/>	Dej_Clone	Give your mobile workforce access to the Field Service mobile app. ...	Field Service Mobile
<input type="checkbox"/>	Clone	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Clone	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Clone	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Clone	Limited access to Order Management features for Self Service.	Lightning Order Management User

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

Setup Home Object Manager

Q Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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App Menu

SETUP

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: -None-

Save Cancel

Help for this Page

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

Setup Home Object Manager

Q Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Permission Sets

Create

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License: -None-

Save Cancel

Help for this Page

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

Permission Set Overview:

Setting	Description	Value
API Name	salesmanager	
Namespace Prefix	GOPALS	
Created By	GOPALS	
Last Modified By	GOPALS	
Session Activation Required	unchecked	

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

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

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

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

Apex Class Access: Permissions to execute Apex classes.

Visualforce Page Access: Permissions to execute Visualforce pages.

External Data Source Access: Permissions to authenticate against external data sources.

Flow Access: Permissions to execute Flows.

Object Settings (Detailed View):

Object Name	Object Permissions	Total Fields	Tab Settings
ACCOUNTS	No Access	40	--
AI Insights 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 Assessments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invites	--	4	--
Appointment Schedule Aggregate	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	--

Screenshot of the Salesforce Setup interface showing the Permission Sets page for the 'salesmanager' permission set.

The left sidebar shows the navigation menu under '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

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Bank' tab is selected. The 'Object Permissions' section shows the following 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"/>

The 'Field Permissions' section shows the following 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"/>

Screenshot of the Salesforce Setup interface showing the Permission Sets page for the 'salesmanager' permission set after changes have been made.

The left sidebar shows the same navigation menu under 'Users'.

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Bank' tab is selected. The 'Object Permissions' section now shows different 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"/>

The 'Field Permissions' section remains the same as in the previous screenshot.

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: V | Reset Password | Salesforce | + | - | Search Setup | Setup | Home | Object Manager | ... | Finish update

Setup Home Object Manager

User salesmanager

Current Assignments

No assignments defined.

Search Setup

Search this list...

Full Name All... Username Role Ac... Profile

Full Name	All...	Username	Role	Ac...	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9oodlh.d6cwpdcuo4wh.hnbdwvwvhq.wguctpr1dalv@gmail.com	Force.com - App Subscription User		
Chatter Expert	Chatty	chatty.00d5j00000bcskkkeab.lo0bfhwmpqjke@chatter.salesforce.com	Chatter Free User		
Diya Adanna	dadan	test_diya_pas.4w8bjybi9wik.tszgrgsbkxpx.3gi0fovzwrs.h43bkzw6mea@gmail.com	UMS User		
GOPAL S	GS	kiot520@gmail.com	System Administrator		
Integration User	integ	integration@00d5j00000bcskkkeab.com	Analytics Cloud Integration User		
madhu b	mb	2k20csit@kiot.ac.in	salesmanager		
Security User	sec	insightssecurity@00d5j00000bcskkkeab.com	Analytics Cloud Security User		
sowmya bala	sbala	2k21it@kiot.ac.in	Manager		

Cancel Next

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: V | Reset Password | Salesforce | + | - | Search Setup | Setup | Home | Object Manager | ... | Finish update

Setup Home Object Manager

Select Users to Assign

All Users

1 item selected

Search this list...

Full Name All... Username Role Ac... Profile

Full Name	All...	Username	Role	Ac...	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9oodlh.d6cwpdcuo4wh.hnbdwvwvhq.wguctpr1dalv@gmail.com	Force.com - App Subscription User		

Cancel Next

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date (radio button selected)

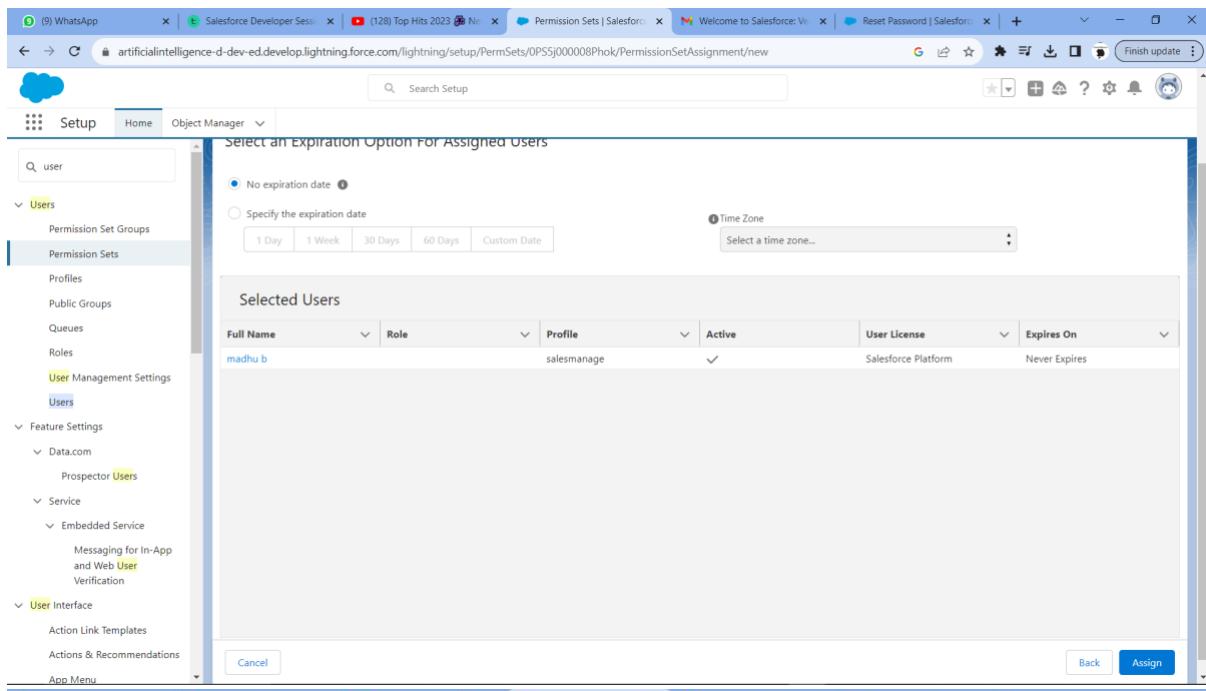
Specify the expiration date (radio button)

Time Zone: Select a time zone...

Selected Users:

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

Cancel Back Assign



Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce

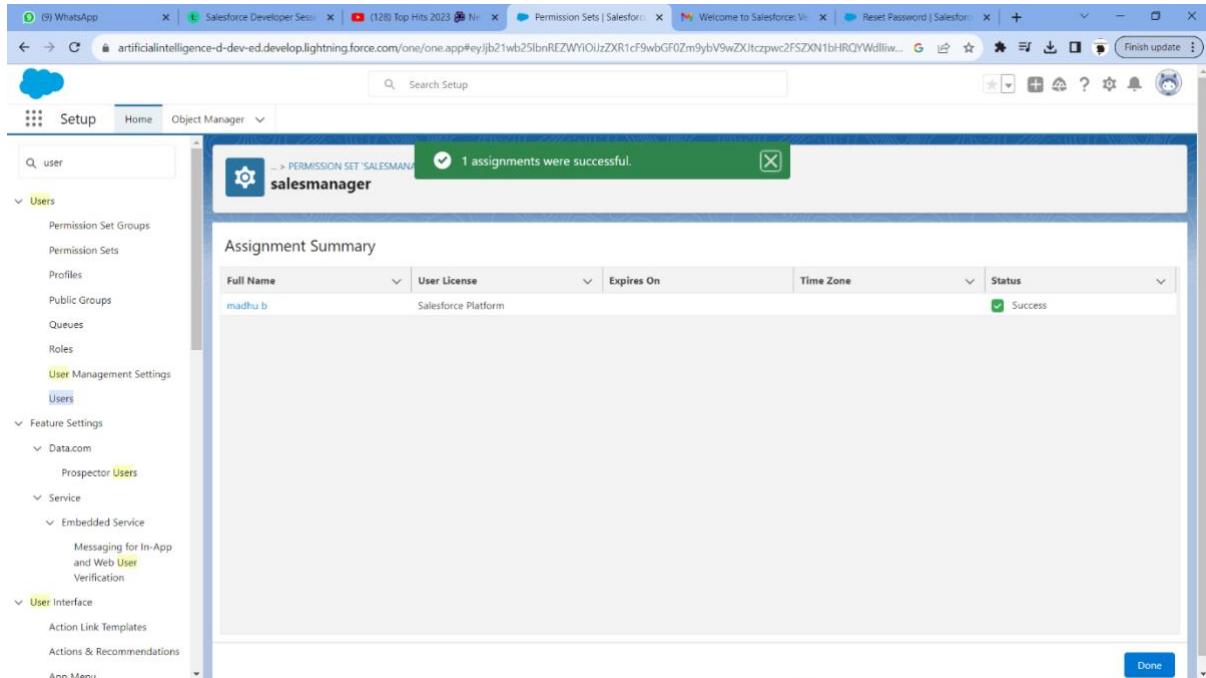
Setup Home Object Manager

PERMISSION SET 'SALESMANAGER' 1 assignments were successful.

Assignment Summary

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

Done



Recently Viewed | customers | [S](#) [+](#)

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

Incognito (3) [Finish update](#)

kiot Bank customers Home

Search...

Recently Viewed ▾

0 items • Updated a few seconds ago

customer Name

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

LIGHTNING LIST VIEW CONTROLS

New

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

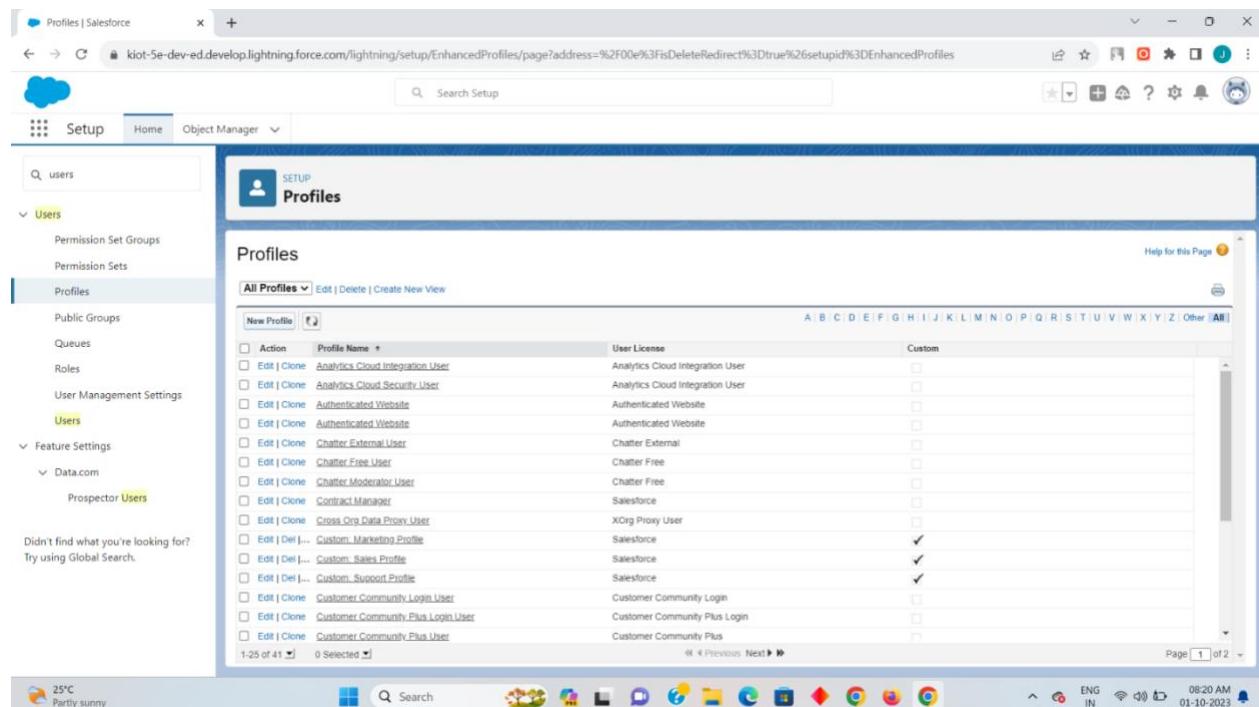
javascript:void(0)

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

Solution:

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

Setup-quick search[profile]

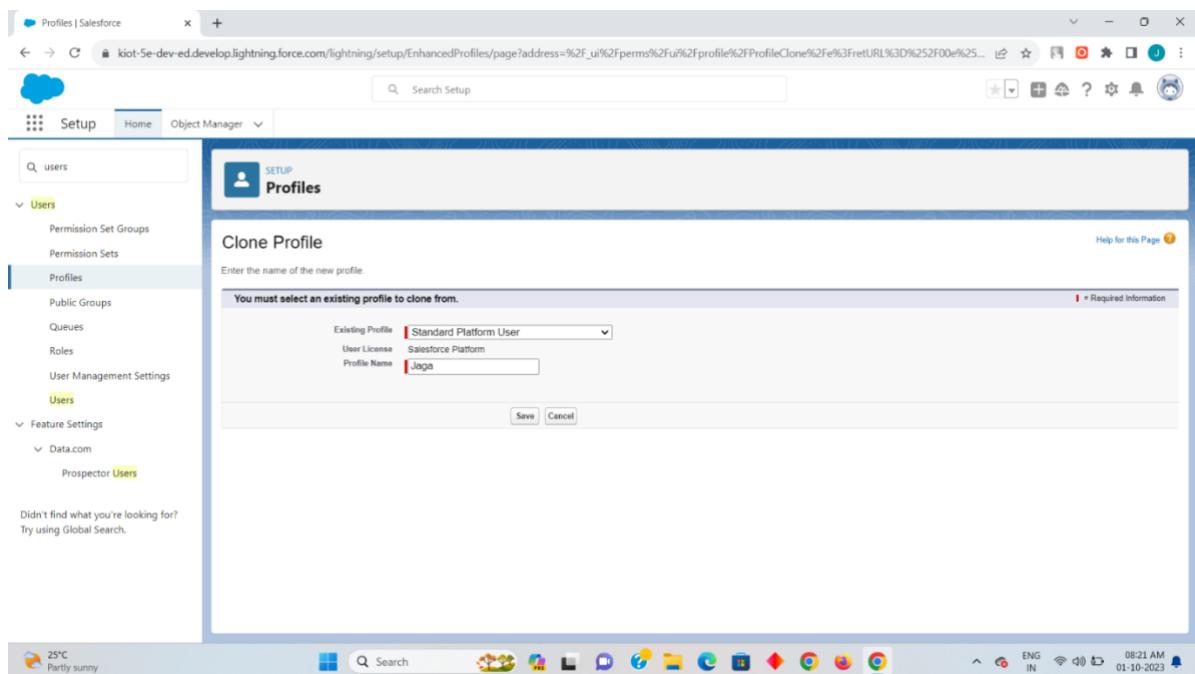


The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager. Under "Users", "Profiles" is selected. Other sections like "Permission Set Groups" and "User Management Settings" are also visible.
- Page Title:** Profiles
- Section:** Profiles
- Buttons:** All Profiles, Edit | Delete, Create New View, Help for this Page.
- Table:** A list of profiles with columns: Action, Profile Name, User License, and Custom. Some profiles have checkboxes next to them, such as "Analytics Cloud Integration User" and "XOrg Proxy User".
- Page Footer:** Page 1 of 2, with navigation arrows.
- System Status:** 25°C Partly sunny, ENG IN, 08:20 AM, 01-10-2023.

Step 2:

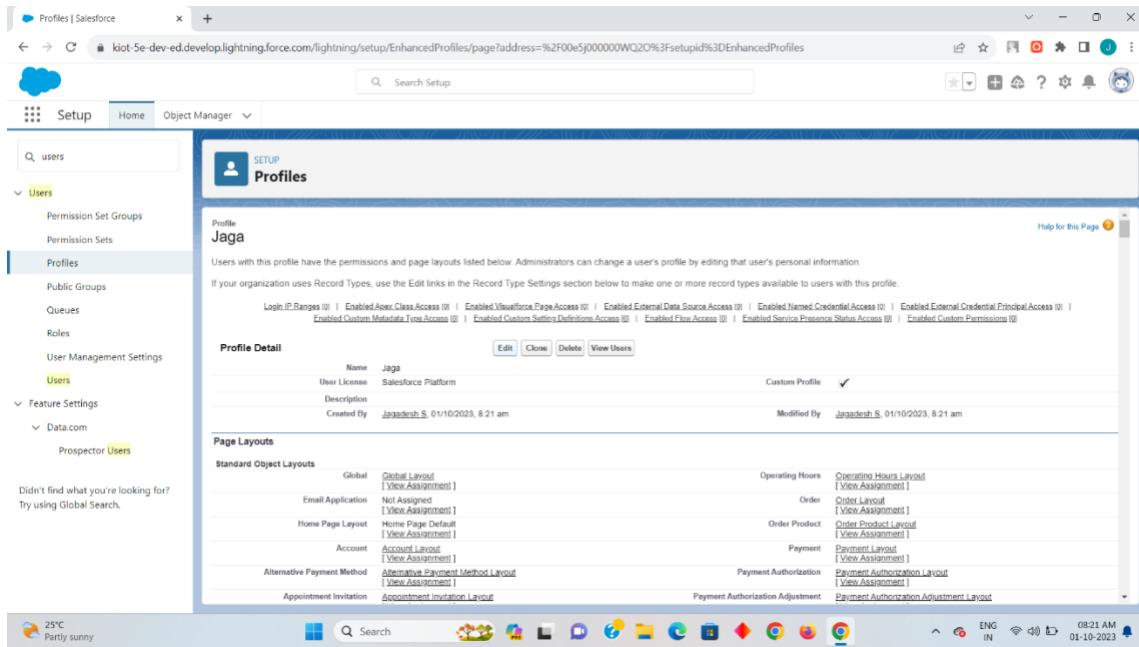
Click on the new to create a new profile along with the label and Api



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

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3FreURL%3D%252F00e5j00000WQ2O%253fsetupid...

Setup Home Object Manager

Search Setup

Users

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

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

SETUP Profiles

Communication Subscriptions, Contact Types, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, User External Credentials

Communication Subscription Consents, Communication Subscription Timings, Contacts, Contact Point Addresses, Contact Point Consents, Contact Point Emails

Basic Access Read Create Edit Delete Data Administration View All Modify All

Providers Resources

Session Settings Session Times Out After 2 hours of inactivity Session Security Level Required at Login None

Enable different Experience Cloud login policies for employees Separate Experience Cloud site and Salesforce login authentication for employees Relax login IP restrictions Skip employee device activation during Experience Cloud site login

25°C Partly sunny 08:21 AM 01-10-2023

Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3FreURL%3D%252F00e5j00000WQ2O%253fsetupid...

Setup Home Object Manager

Search Setup

Users

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

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

SETUP Profiles

Communication Subscriptions, Contact Types, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, User External Credentials

Communication Subscription Consents, Communication Subscription Timings, Contacts, Contact Point Addresses, Contact Point Consents, Contact Point Emails

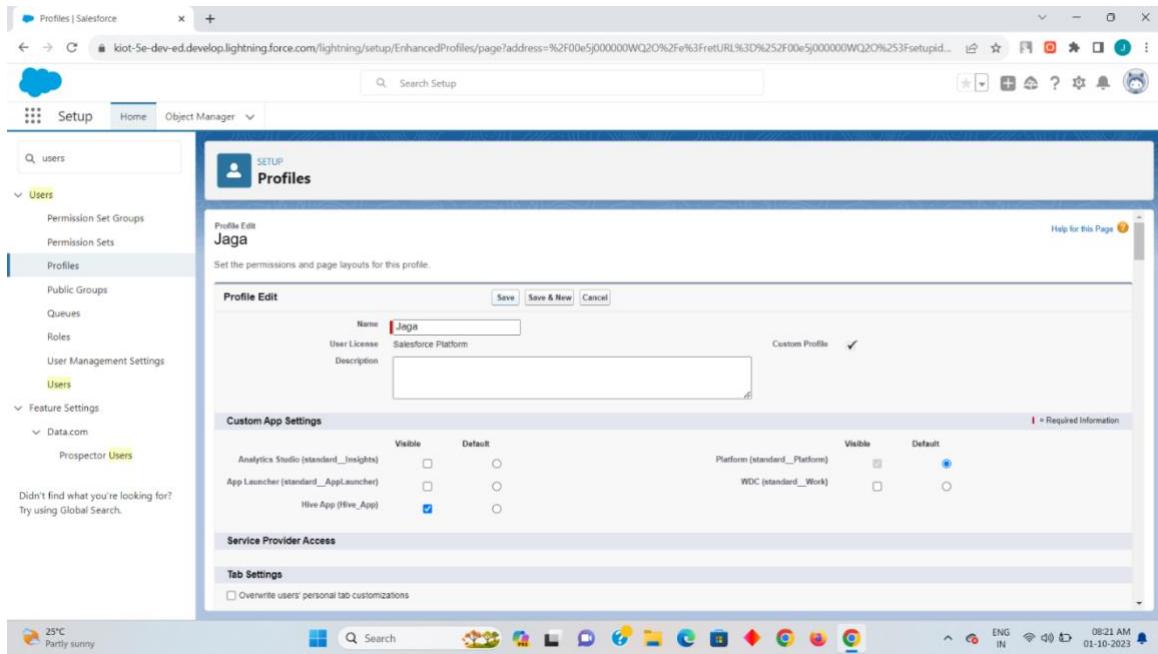
Basic Access Read Create Edit Delete Data Administration View All Modify All

Providers Resources

Session Settings Session Times Out After 2 hours of inactivity Session Security Level Required at Login None

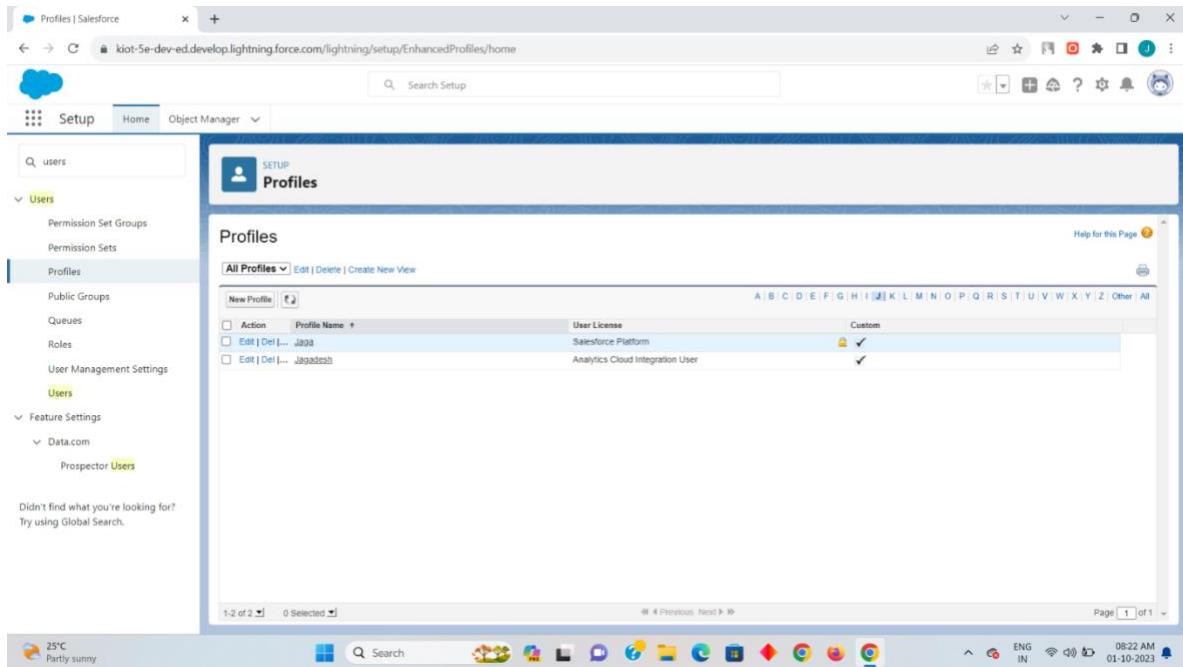
Enable different Experience Cloud login policies for employees Separate Experience Cloud site and Salesforce login authentication for employees Relax login IP restrictions Skip employee device activation during Experience Cloud site login

25°C Partly sunny 08:21 AM 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



Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along

with the profile as Jaga which we have created on the step 2.once the one user has been created click on the save&new so that you can create the second user and there the user name can be created with alternate name but with the same user profile and once the two user are created click on save.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty.00d500000c0joseaf.6z@berkx44@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit	Grey_Jane	jgrey	jane.grey_hygnimmoam.cz7dz2koogt3@gmail.com	<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	Edit	S.Jaga	JS	jaga266@gmail.com	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit	S.Jagadeesh	JS	wow@gmail.com	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	S.Jagadeesh	JS	jaga1117@gmail.com	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit	User_Integration	Integ	integration@00d500000c0joseaf.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00d500000c0joseaf.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Users | Salesforce

Setup Home Object Manager

Search Setup

New User

User Edit Save Save & New Cancel

General Information

First Name	Jagadesh11
Last Name	S
Alias	R
Email	jag123@gmail.com
Username	jag123@gmail.com
Nickname	User1696128751449629
Title	
Company	
Department	
Division	

Role Director, Channel Sales **User License** Salesforce Platform **Profile** -None- **Active** -None- **Marketing User** Jaga Standard Platform User

Office User Knowledge User Flow User Service Cloud User Site.com Contributor User Site.com Publisher User WDC User

Data.com User Type -None- Data.com Monthly Addition Limit Default Limit (300) Accessibility Mode (Classic Only) High-Contrast Palette on Charts

Help for this Page

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08:23 AM 01-10-2023 ENG IN

Users | Salesforce

Setup Home Object Manager

Search Setup

New User

User Edit Save Save & New Cancel

General Information

First Name	Jagadesh22
Last Name	S
Alias	R
Email	jag1@gmail.com
Username	jag1@gmail.com
Nickname	User169612879963618745
Title	
Company	
Department	
Division	

Role Marketing Team **User License** Salesforce Platform **Profile** -None- **Active** -None- **Marketing User** Jaga Standard Platform User

Office User Knowledge User Flow User Service Cloud User Site.com Contributor User Site.com Publisher User WDC User

Data.com User Type -None- Data.com Monthly Addition Limit Default Limit (300) Accessibility Mode (Classic Only) High-Contrast Palette on Charts

Help for this Page

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Users | Salesforce

Setup Home Object Manager

Search Setup

All Users

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

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

View: All Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Ent S.Jaga	s	jagat09@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Ent S.Jagadeesh	s	w0r@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Ent S.Jagadeesh	s	jag1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	Ent S.Jagadeesh11	s	jag123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	Ent S.Jagadeesh22	s	jag10@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

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

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

Step 6:

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

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

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

On this page you can create, view, and manage permission sets.
In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | Edit | Delete | Create New View

New

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

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

1-25 of 30 | 0 Selected |

Page | 1 | of 2 |

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

25°C Partly sunny

Q Search

ENG IN 06:24 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

On this page you can create, view, and manage permission sets.
In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

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:

Save Cancel

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

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Q Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgt%3FsfdclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

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

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

Video Tutorial | Help for this Page

Permission Set Overview

Description	License
Session Activation Required	<input type="checkbox"/>
Last Modified By	Jagadish 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

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgt%3Ds%3DEntityPermissions

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

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

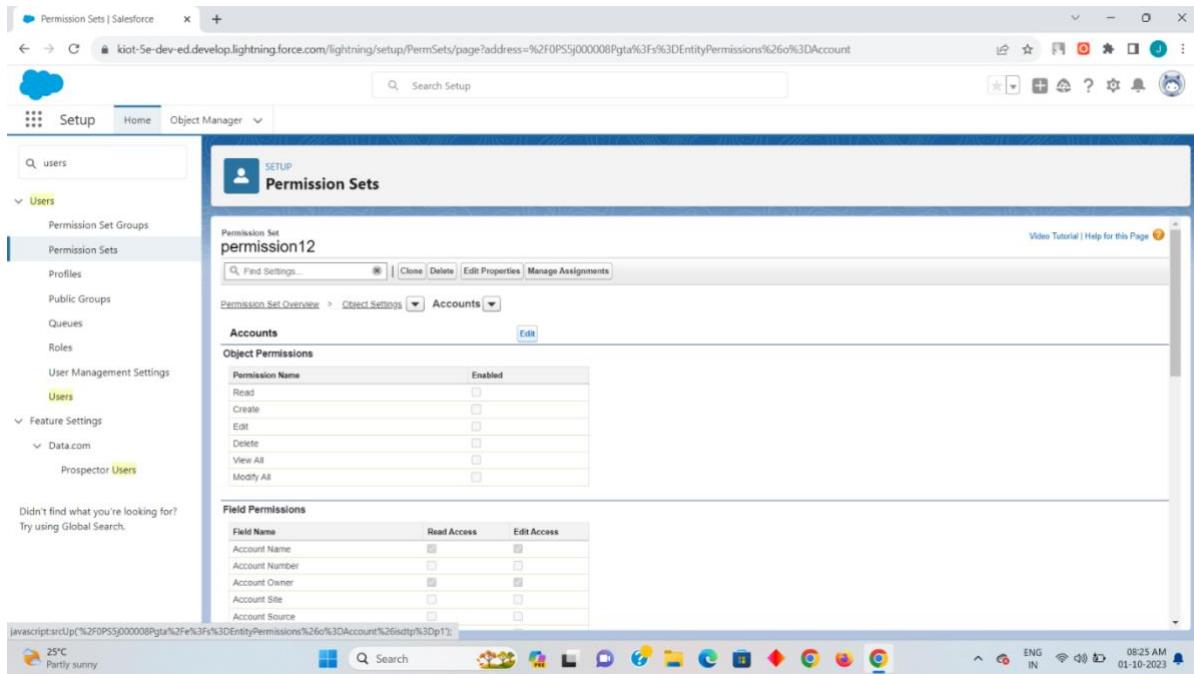
Didn't find what you're looking for?
Try using Global Search.

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Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	9	--
Accounts	No Access	44	--
AI Insight Reasons	No Access	--	--
AI Recent Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
Age Analytics Query Requests	No Access	--	--
Application Usage Assessments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invites	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--

ENG IN 08:25 AM 01-10-2023



Step 7:

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

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

- Screenshot 1:** Shows the 'Object Permissions' section for the 'Accounts' object. Under 'Object Permissions', the 'Enabled' column is checked for all permissions: Read, Create, Edit, Delete, View All, and Modify All.
- Screenshot 2:** Shows the 'Object Permissions' section for the 'Accounts' object. Under 'Object Permissions', the 'Enabled' column is checked for Read, Create, Edit, and Delete, while View All and Modify All are unchecked.
- Screenshot 3:** Shows the 'Object Permissions' section for the 'Accounts' object. Under 'Object Permissions', the 'Enabled' column is checked for Read, Create, Edit, and Delete, while View All and Modify All are checked.

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.

The screenshot shows the 'Permission Sets | Salesforce' page in a browser. The URL is kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/OPSS000008PgtA/PermissionSetAssignment/home. The left sidebar is open, showing 'Users' selected under 'Permission Sets'. The main content area is titled 'permission12' and shows a section titled 'Current Assignments' with a decorative illustration of a cactus and sun. Below it, a message says 'No assignments defined.'

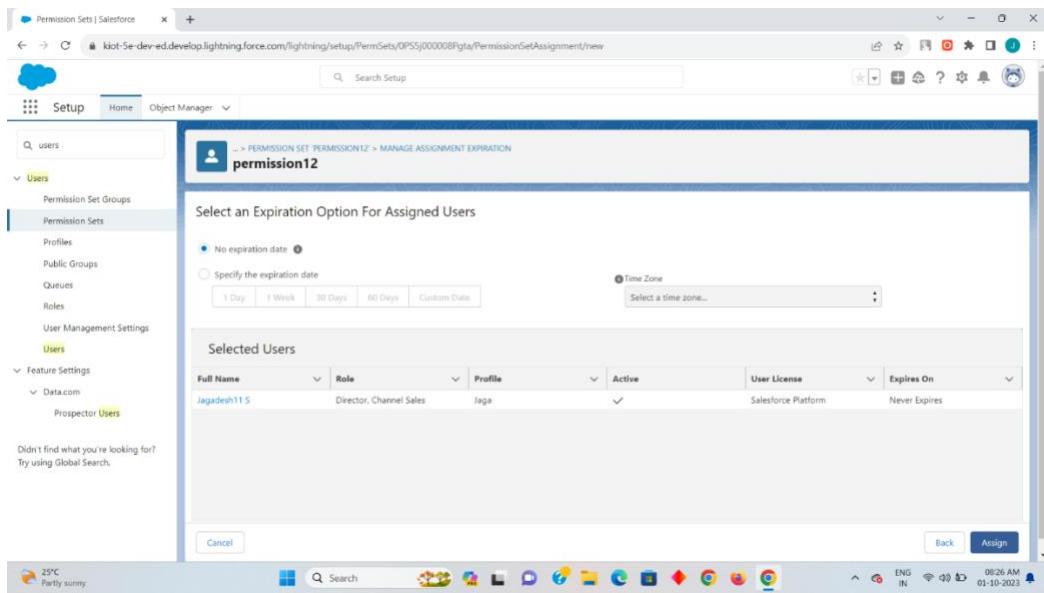
This screenshot shows the 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' step. The search bar at the top contains 'jagadesh'. The table lists four users: jagadesh, jagadesh11, jagadesh22, and jagadesh11. The 'jagadesh' row has a checked checkbox in the 'Active' column. A tooltip for the 'Active' column header states: 'Role, Alias, and Profile aren't searchable. Use filters or sort on these fields instead.'

Full Name	Alias	Username	Role	Active	Profile
jagadesh	JS	wow@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
jagadesh	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
jagadesh11	JB	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
jagadesh22	JB	jaat@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

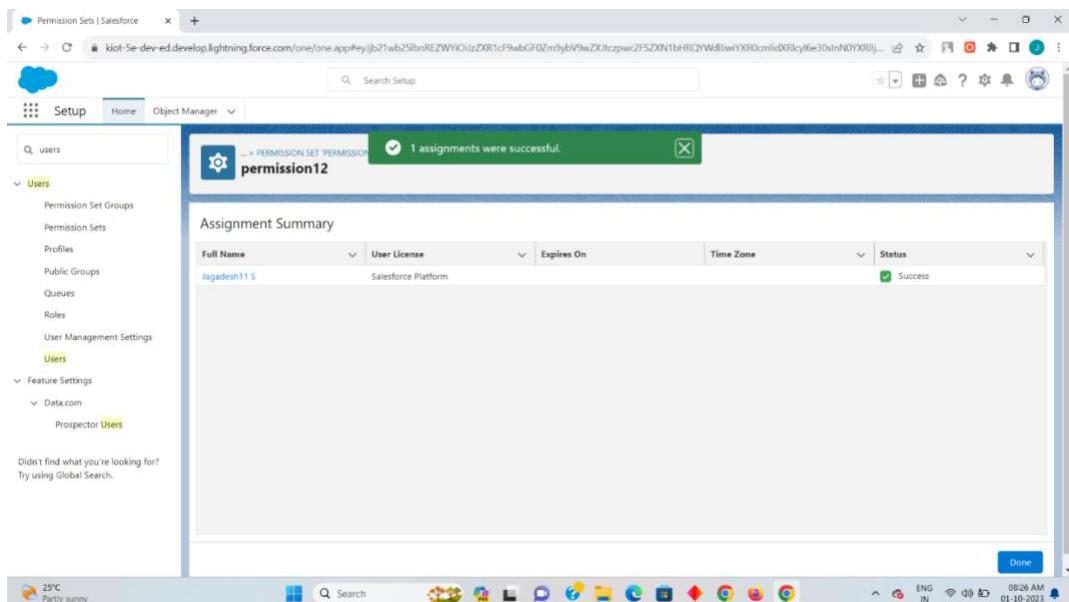
This screenshot shows the same 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' step. Now, the 'jagadesh11' row has a checked checkbox in the 'Active' column, while the others are unchecked.

Full Name	Alias	Username	Role	Active	Profile
jagadesh	JS	wow@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
jagadesh	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
jagadesh11	JB	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
jagadesh22	JB	jaat@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

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**.

Fields & Relationships		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Comment	Comment__c	Text Area(255)			
Lightning Record Pages	Created By	CreatedById	Lookup(User)			
Buttons, Links, and Actions	Email	Email__c	Email			
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)			
Field Sets	Name	Name__c	Text(51)			
Object Limits	Owner	OwnerId	Lookup(User,Group)		✓	
Record Types	Rating	Rating__c	Picklist			
Related Lookup Filters	Survey Result Name	Name	Auto Number		✓	
Search Layouts						
Search Layouts for Salesforce Classic						
Triggers						
Validation Rules						

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

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

Email Template
Thank You Email - Survey

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
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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.**

Survey - Thank You Email

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Recipient Type: Email Field: Email

Available Recipients:

- User: Integration User
- User: Rakesh Gupta
- User: Security User

Selected Recipients:

- Email Field: Email

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

From Email Address: Current User's email address

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

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

- 1. Click Setup.**

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

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

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

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

Edit Create Records

Create Salesforce records using values from the flow.

* Label: Save Response * API Name: Save_Response

Description:

How Many Records to Create
 One
 Multiple

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

Create a Record of This Object
* Object: Survey Result

Set Field Values for the Survey Result

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

Cancel Done

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

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

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

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

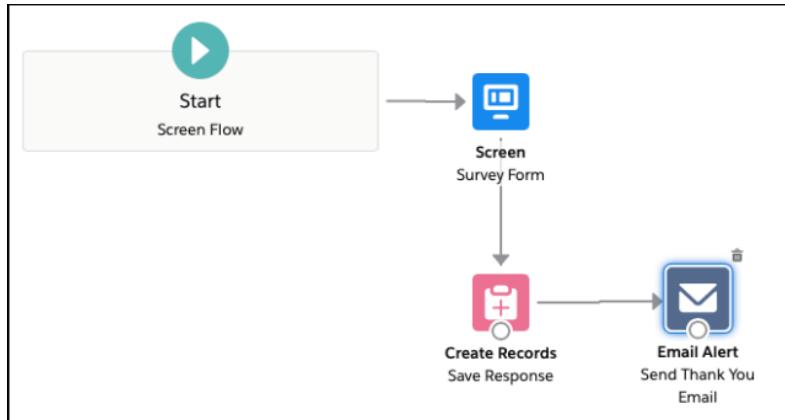
5.Click Done.

Edit "Survey - Thank You Email" email alert

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

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

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



1.Click Save.

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

3.Click **Show Advanced**.

4. How to Run the Flow: User or System Context—Depends on How Flow is Launched

5. Type: Screen Flow

6. API Version for Running the Flow: 51

7. Interview Label: Survey

{!\$Flow.CurrentDateTime}

8. Click Save.

Save as

A New Version A New Flow

* Flow Label * 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: Active

Type: Screen Flow

Version Number: 2

Cancel Save

The screenshot shows the 'Save as' dialog for creating a new flow. The 'A New Version' button is highlighted. The flow is named 'Survey' with an API name of 'Survey'. The 'How to Run the Flow' setting is 'User or System Context—Depends on How Flow is Launched'. The flow type is 'Screen Flow' and the API version is '51'. The interview label is set to the formula '{!\$Flow.CurrentDateTime}'. The status is 'Active', the type is 'Screen Flow', and the version number is '2'. The dialog includes 'Cancel' and 'Save' buttons.

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

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

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

The screenshot shows the Salesforce IDE interface. At the top, there's a menu bar with options like File, Edit, Debug, Test, Workspace, Help, and navigation arrows. Below the menu is a tab bar with 'VFPageToLC.app *'. The main area contains the following code:

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

At the bottom of the interface, there's a blue footer bar with the text 'Logs, Tests, and Problems' and a small icon.

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

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

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

component on the page using `$Lightning.createComponent()`

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

The screenshot shows the Salesforce Visualforce Page Editor. At the top, there's a header with 'Visualforce Page' and 'Survey'. Below it is a 'Page Edit' toolbar with 'Save', 'Quick Save', 'Cancel', 'Where is this used?', 'Component Reference', and 'Preview' buttons. A note 'I = Required Information' is present. The main area has a 'Page Information' section where 'Label' and 'Name' are set to 'Survey', and a 'Description' field is empty. Under 'Available for Lightning Experience, Experience Builder mobile, and the mobile app', the 'Checkmark' checkbox is checked. Under 'Require CSRF protection on GET requests', the checkbox is unchecked. Below this is a 'Visualforce Markup' tab which contains the following code:

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

```

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

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

1. Click **Setup**.

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

The screenshot shows the 'Site Edit' page in Salesforce. The page has a header with 'Site Edit' and buttons for 'Save' and 'Cancel'. It contains several input fields and dropdown menus for configuring a site. The 'Site Label' is set to 'Survey'. The 'Default Web Address' field contains the URL 'http://kathiara-developer-edition.gus.force.com/survey'. The 'Active' checkbox is checked. Under the 'Users' section, 'Upgrade all requests to HTTPS' is checked. Under 'Protection', 'Enable Content Sniffing' and 'Referrer URL Protection' are checked. Under 'Scripting Protection', 'Enable Browser Cross Site' is checked. Under 'API', 'Guest Access to the Payments' is 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:

Survey

Name

First Name
Alok

Last Name
Sinfal

*Email
[REDACTED]

*Rating
5

*Comment
Awesome Blog 

Next

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

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

 **Survey Site Guest User** via [bj9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com](#) to me  8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,
Automation Champion