

Naan Mudhalvan
Salesforce Developer(Course)
Assignment no 1

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Year & Dep : 4th year & IT
Batch : 2024
Zone no : Zone 8

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

Solution:

Step 1: Create Custom Objects

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

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** Shows "Setup" > "Object Manager" > "New Custom Object".
- Title Bar:** "SETUP" and "New Custom Object".
- Page Content:**
 - New Custom Object**
 - A message bar at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)".
 - Custom Object Definition Edit** section with buttons: "Save", "Save & New", "Cancel". A note says "I = Required Information".
 - Custom Object Information** section:
 - The singular and plural labels are used in tabs, page layouts, and reports.
 - Label:** college (Example: Account)
 - Plural Label:** colleges (Example: Accounts)
 - Starts with vowel sound:**
 - The Object Name is used when referencing the object via the API.
 - Object Name:** college (Example: Account)
 - Description:** (Large text area)
 - Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
 - Content Name:** (dropdown menu) -None-
 - Enter Record Name Label and Format** section:
 - 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:** Text (dropdown menu)
 - Optional Features** section (checkboxes):
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing
 - Object Classification** section (checkboxes):
 - Allow Sharing
 - Allow Bulk API Access
 - Allow Streaming API Access
 - Deployment Status** section (radio buttons):
 - In Development
 - Deployed
 - Search Status** section (checkbox):
 - Allow Search
 - Object Creation Options (Available only when custom object is first created)** section (checkboxes):
 - Add Notes and Attachments related list to default page layout
 - Launch New Custom Tab Wizard after saving this custom object
 - Buttons at the bottom: "Save", "Save & New", "Cancel".

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main page title is 'New Custom Object'. A message bar at the top indicates that permissions for this object are disabled by default. The 'Custom Object Definition Edit' section contains fields for 'Label' (set to 'department') and 'Plural Label' (set to 'departments'). There is also a checkbox for 'Starts with vowel sound'. Below this, the 'Object Name' field is set to 'department'. The 'Description' field is empty. Under 'Context-Sensitive Help Setting', the radio button for 'Open the standard Salesforce.com Help & Training window' is selected. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section includes a note about record names appearing in various contexts. The 'Record Name' field is set to 'Department Name' and the 'Data Type' is 'Text'. The 'Optional Features' section contains several checkboxes, all of which are checked: 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', 'Enable Licensing', 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has 'Allow Search' 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'. At the bottom of the page are 'Save', 'Save & New', and 'Cancel' buttons.

Step 2: Create a Master-Detail Relationship

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

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

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

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

Details

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

Edit Delete

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

Details

Fields & Relationships

New Relationship

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

Help for this Page

Previous Next Cancel

Field Label: college

Field Name: college

Description:

Help Text:

Child Relationship Name: CDepartments

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

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

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

Lookup Filter

The top screenshot shows the 'New Relationship' wizard, Step 2 of 6. It asks to select a related object, with 'college' typed into the search bar. The bottom screenshot shows the 'New Custom Field' wizard, Step 1 of 6. It asks to choose a field type, with 'Roll-Up Summary' selected. A detailed description of this field type is provided, mentioning it 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.

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.**

| Fields & Relationships | | | | | | |
|------------------------|--|------------------|----------------|------------------------|-------------------|---------|
| | | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| | | college | college__c | Master-Detail(college) | ✓ | ✓ |
| | | Created By | CreatedBy | Lookup(User) | | |
| | | Department Name | Name | Text(80) | ✓ | ✓ |
| | | Last Modified By | LastModifiedBy | Lookup(User) | | |

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. The main content area is titled 'Custom Tabs' and contains several sections:

- Custom Object Tabs**: A table showing three tabs: 'Book1' (Box style), 'Research Proposal' (Square style), and 'student' (Box style). Actions for each tab include 'Edit' and 'Delete'.
- Web Tabs**: A section stating "No Web Tabs have been defined".
- Visualforce Tabs**: A section stating "No Visualforce Tabs have been defined".
- Lightning Component Tabs**: A section stating "No Lightning component tabs have been defined".
- Lightning Page Tabs**: A section stating "No Lightning Page Tabs have been defined".

A help link 'Help for this Page' is located in the top right corner of the content area.

The screenshot shows the Salesforce Setup interface under the 'Object Manager' section, specifically for the 'college' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'college'. The main content area is titled 'New Custom Field' and displays the following information:

Step 5. Add to page layouts

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

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

Add Field Page Layout Name
 college Layout

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

Buttons at the bottom right include 'Previous', 'Save & New', 'Save', and 'Cancel'.

The screenshot shows the 'New Custom Field' setup page in Salesforce. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area is titled 'Step 4. Establish field-level security' with 'Step 4 of 5' at the top right. It displays a table of profiles and their security settings:

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

At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

The screenshot shows the 'New Custom Field' setup page in Salesforce. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area is titled 'Step 3. Define the summary calculation' with 'Step 3 of 5' at the top right. It includes sections for selecting the master object, summarizing by department, choosing a roll-up type (COUNT selected), and defining filter criteria (All records selected). A note indicates that the summarized object must be a department.

Select Object to Summarize
Master Object: college
Summarized Object: CDDepartments

Select Roll-Up Type
COUNT (selected)
SUM
MIN
MAX
Field to Aggregate: None

Filter Criteria
All records should be included in the calculation (selected)
Only records meeting certain criteria should be included in the calculation

At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being created is 'college'. The field name is 'Total count' and the field label is also 'Total count'. The field type is set to 'Roll Up Summary'. The 'Add this field to existing custom report types' checkbox is checked. The page is labeled 'Step 2 of 5'.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being created is 'college'. The field type is selected as 'Roll Up Summary'. The page is labeled 'Step 1'.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'college'. Below the navigation is a breadcrumb trail: 'SETUP > OBJECT MANAGER college'. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Lightning Record Pages', and 'Validation Rules'. The main content area is titled 'Fields & Relationships' and shows a table with four items. The table has columns: 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 | CreatedBy | Lookup(User) | | |
| Last Modified By | LastModifiedBy | 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. The main title is 'New Custom Object Tab'. A sub-header indicates 'Step 2. Add to Profiles' and 'Step 2 of 3'. The page instructs the user to choose user profiles for which the new custom tab will be available. It provides two options: 'Apply one tab visibility to all profiles [Default On]' (selected) and 'Apply a different tab visibility for each profile'. A list of user profiles is displayed on the left, and corresponding dropdown menus for 'Tab Visibility' are shown on the right. The profiles listed include: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Cloud Kicks Admin, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, customer, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, Customer Portal Manager Custom, Customer Portal Manager Standard, External Apps Login User, External Identity User, Force.com - App Subscription User, Force.com - Free User, Gold Partner User, High Volume Customer Portal, High Volume Customer Portal User, Identity User, Manager, Marketing User, Minimum Access - Salesforce, Partner App Subscription User, Partner Community Login User, Partner Community User, Read Only, Research Manager, Research Users, Salesforce API Only System Integrations, Sales User, security profile, Silver Partner User, Solution Manager, Standard Platform User, Standard User, and System Administrator. At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons.

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

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

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

New Custom Object Tab

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

Salesforce Setup interface showing the 'Tabs' section.

Search bar: Search Setup

Header icons: Home, Object Manager, Help, Notifications, User Profile

Left sidebar:

- User Interface
- Rename Tabs and Labels
- Tabs

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

Section: Custom Tabs

Description: You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Help for this Page

Custom Object Tabs:

| Action | Label | Tab Style | Description |
|------------|-------------------|-----------|-------------|
| Edit Del | Book1 | Box | |
| Edit Del | Departments | Lightning | |
| Edit Del | colleges | Jewel | |
| Edit Del | Research_Proposal | Square | |
| Edit Del | student | Box | |

Web Tabs:

No Web Tabs have been defined.

Visualforce Tabs:

No Visualforce Tabs have been defined.

Lightning Component Tabs:

No Lightning component tabs have been defined.

Lightning Page Tabs:

No Lightning Page Tabs have been defined.

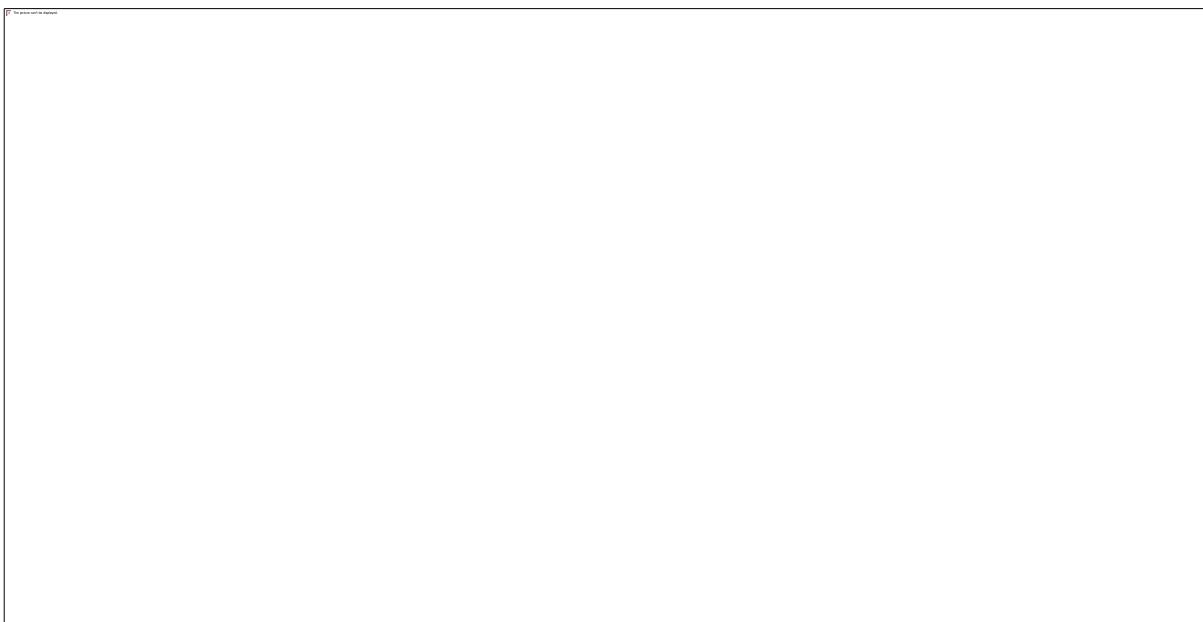
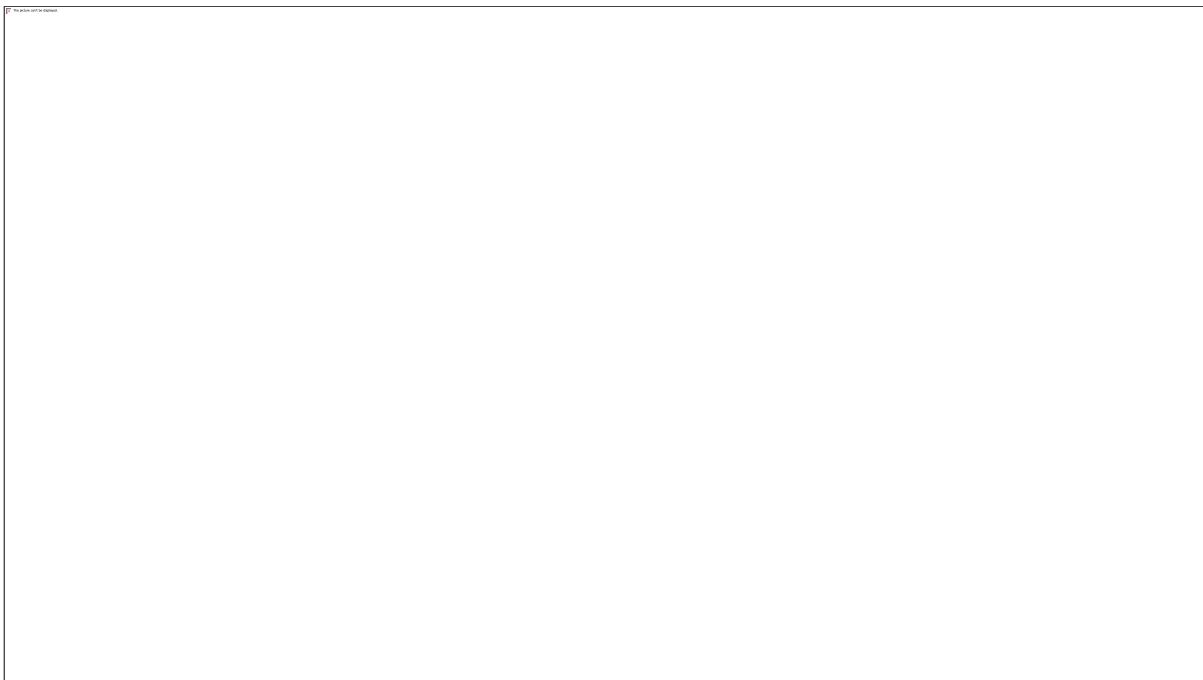
The bottom half of the screen is a large empty white area.

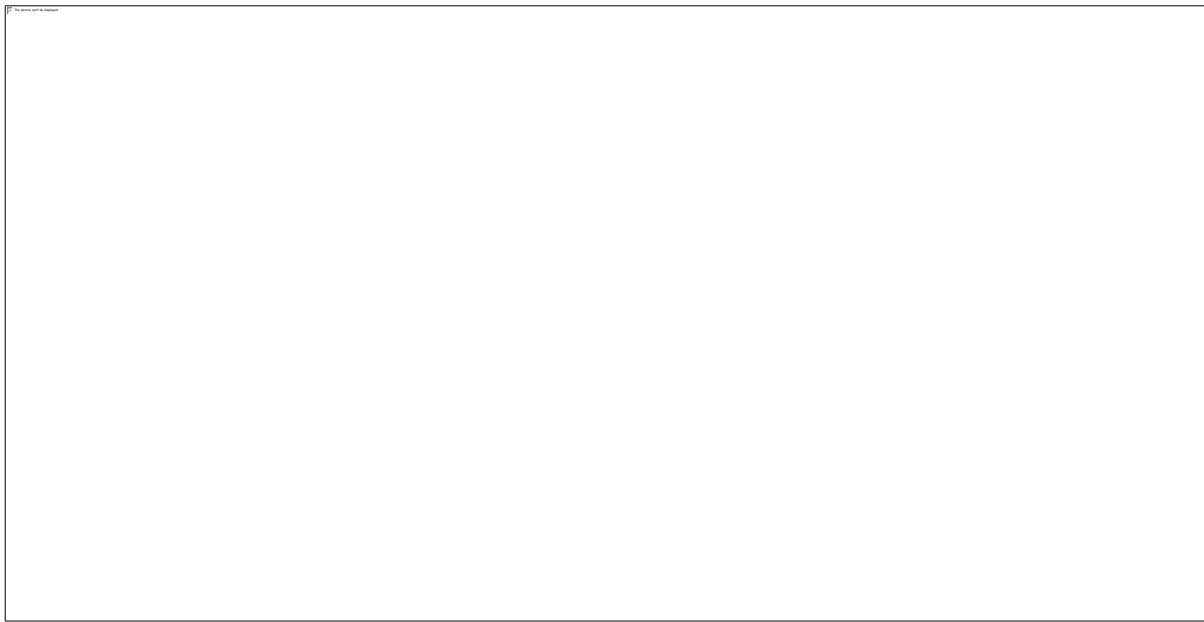
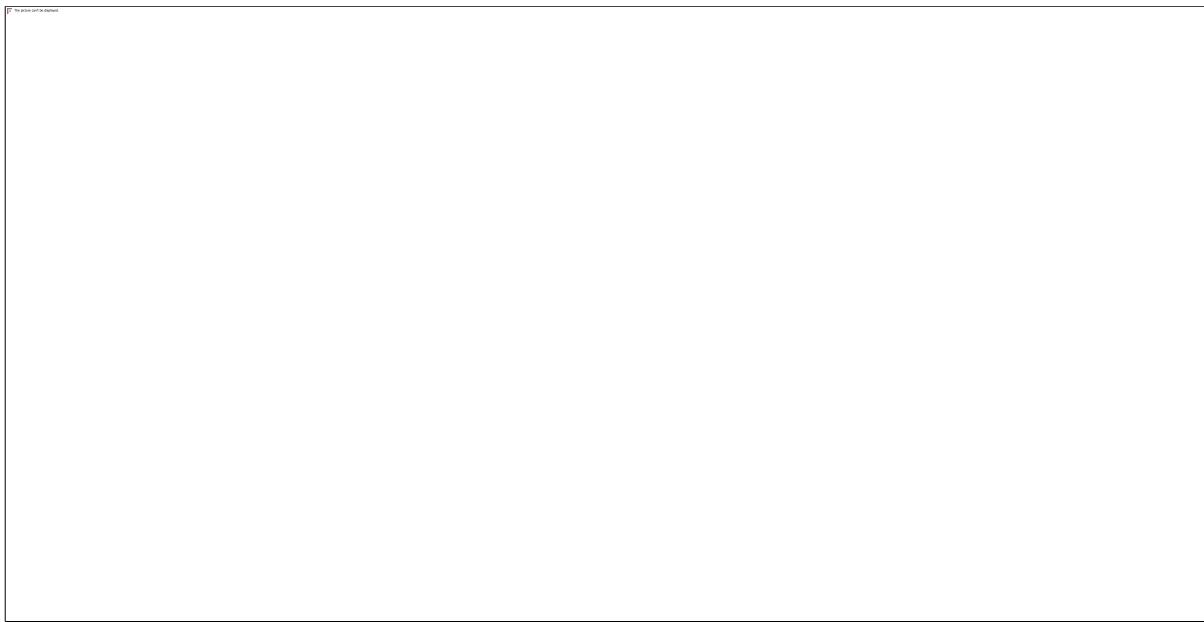
Conclusion:

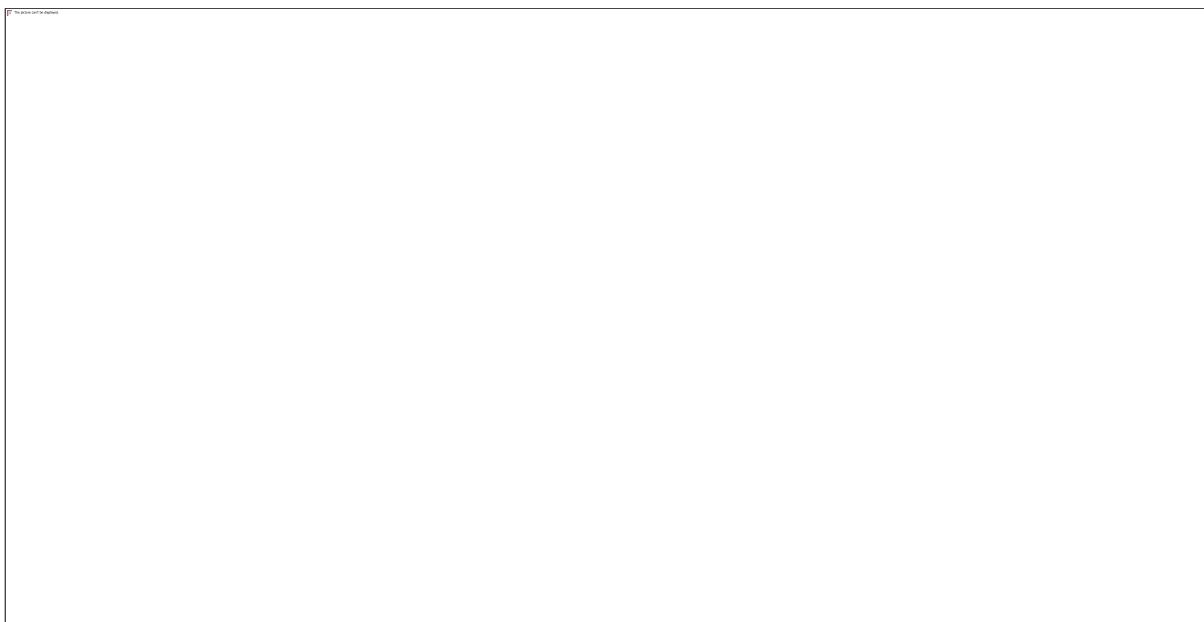
Now, whenever you create or update a record in the "Department_c" related to a "College_c," the "TotalCount_c" field on the "College_c" will automatically update to show the total number of related records.

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.









MECW

My college colleges CDdepartments student Content

Search... ★ + ? ☰ 🔍

college mecw New Contact Edit New Opportunity ▾

Details

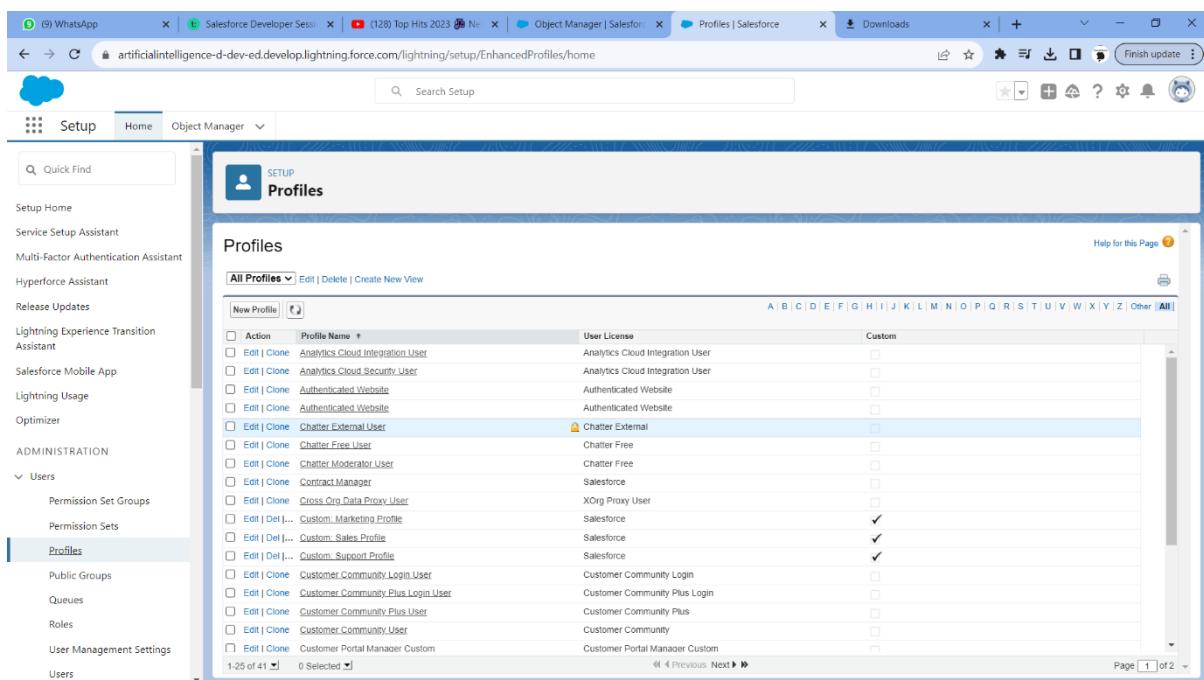
| | |
|--|--|
| Related | Details |
| college Name mecw | Owner krishna s |
| Total count 2 | |
| phone 9087116402 | |
| Email kion@gmail.com | |
| Location 90, 80 | |
| Created By krishna s , 01/10/2023, 11:16 am | Last Modified By krishna s , 01/10/2023, 11:19 am |

History

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main area displays a list of profiles, each with a checkbox, a profile name, a user license, and a status column. The status column contains icons indicating whether the profile is standard or custom. The list includes profiles like '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 status column for most profiles shows 'Custom' with a checkmark, except for a few which show 'Standard' with a standard icon.

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes options like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users (with sub-options: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users). The main content area displays a table titled "Profiles" with columns: Action, Profile Name, User License, and Custom. The table lists various profiles such as "Salesforce API Only System Integrations", "salesmanager", "Silver Partner User", "Solution Manager", "Standard Platform User", "Standard User", and "System Administrator". A navigation bar at the bottom indicates "1 of 7" and "0 Selected".

The screenshot shows the "Clone Profile" dialog box. The left sidebar is identical to the previous screenshot. The main content area has a header "Clone Profile" and a sub-header "Enter the name of the new profile." Below this, a message says "You must select an existing profile to clone from." It shows a table with columns: Existing Profile, User License, and Profile Name. Under "Existing Profile", it lists "Standard Platform User". Under "User License", it lists "Salesforce Platform". Under "Profile Name", there is a text input field containing a redacted value. At the bottom of the dialog are "Save" and "Cancel" buttons.

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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

Help for this Page

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

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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 |

Custom Profile ✓

Page Layouts

| Standard Object Layouts | Global | Operating Hours |
|----------------------------|--|---|
| Email Application | Global Layout [View Assignment] | Operating Hours Layout [View Assignment] |
| Home Page Layout | No Assigned [View Assignment] | Order [View Assignment] |
| Account | Home Page Default [View Assignment] | Order Product [View Assignment] |
| Alternative Payment Method | Account Layout [View Assignment] | Payment [View Assignment] |
| Appointment Invitation | Alternative Payment Method Layout [View Assignment] | Payment Authorization [View Assignment] |
| Asset | Appointment Invitation Layout [View Assignment] | Payment Authorization Adjustment [View Assignment] |
| | Asset Layout [View Assignment] | Payment Gateway [View Assignment] |

Help for this Page

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

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

Finish update

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

Manager

Set the permissions and page layouts for this profile.

Profile Edit

| Name | Manager | User License | Salesforce Platform | Description | Custom Profile |
|---------------------------------------|----------------------------------|----------------------------------|-------------------------------|-----------------------|----------------------------------|
| Analytics Studio (standard__Insights) | <input type="radio"/> | <input checked="" type="radio"/> | Platform (standard__Platform) | Visible | Default |
| App Launcher (standard__AppLauncher) | <input type="radio"/> | <input checked="" type="radio"/> | WDC (standard__Work) | <input type="radio"/> | <input checked="" type="radio"/> |
| slot (slot) | <input checked="" type="radio"/> | <input type="radio"/> | | | |

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

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

Custom Object Permissions

| Object | Basic Access | Data Administration |
|-----------|---|---------------------|
| Bank | Read Create Edit Delete View All Modify All | |
| customers | Read Create Edit Delete View All Modify All | |

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Custom Object Permissions

| Object | Basic Access | Data Administration |
|----------------------|---|---------------------|
| Enhancement Requests | Read Create Edit Delete View All Modify All | |

Custom Object Permissions

| Object | Basic Access | Data Administration |
|---------------------------|---|---------------------|
| User External Credentials | Read Create Edit Delete View All Modify All | |

Communication Subscription Channel Types

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

Custom Object Permissions

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Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e500000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | 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

Custom Object Permissions

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

Session Settings

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

Password Policies

| | |
|----------------------------------|---|
| User passwords expire in: | 90 days |
| Enforce password history: | 3 passwords remembered |
| Minimum password length: | 8 |
| Password complexity requirement: | Must include alpha and numeric characters |
| Password question requirement: | Cannot contain password |
| Maximum invalid login attempts: | 10 |
| Lockout effective period: | 15 minutes |

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e500000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | 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

Custom Object Permissions

| | Bank | customers | Enhancement Requests | | |
|-------------------------|----------|-----------|----------------------|--------|---------------------|
| Contact Point Addresses | Read | Read | Read | | |
| Contact Point Consents | Read | Read | Read | | |
| Contact Point Emails | Read | Read | Read | | |
| Basic Access | Read | Create | Edit | Delete | Data Administration |
| | View All | Modify | View All | Modify | View All |

Session Settings

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

Password Policies

| | |
|----------------------------------|---|
| User passwords expire in: | 90 days |
| Enforce password history: | 3 passwords remembered |
| Minimum password length: | 8 |
| Password complexity requirement: | Must include alpha and numeric characters |
| Password question requirement: | Cannot contain password |
| Maximum invalid login attempts: | 10 |
| Lockout effective period: | 15 minutes |

Obscure secret answer for password resets | Require a minimum 1 day password lifetime | Don't immediately expire links in forgot password emails

Salesforce Developer Session | 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"/> |
| Data Administration | <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

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

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

View: All Users | Edit | Create New | View

| Action | Full Name | Alias | Username | Role | Active | Profile |
|---|------------------|---------|---|-------------------------------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> Edit Login | Adriana_Diva | dadan | test_diva_pas_4w@bytb9wtk.tszgrgshkpx3qj8efoyzwns.h43hkzw6mea@gmail.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | JMS User |
| <input type="checkbox"/> Edit | Chatter_Expert | Chatter | chatty.00d500000bcskkeab.lo0hfwmn0ite@chatter.salesforce.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> Edit Login | Ellington_Amelia | aell | amelia.ellington.146kxc95000jh.d6cwyodcu04wh.hnb0wmvwhho.wguctor1dalv@gmail.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> Edit | S_GCPA | GS | kot520@gmail.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> Edit | User_Integration | integ | integration@00d500000bcskkeab.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User_Security | sec | insightssecurity@00d500000bcskkeab.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Analytics Cloud Security User |

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

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: [] Role: <None Specified>

Last Name: [] User License: Salesforce Integration

Alias: [] Profile: Salesforce API Only System Integrations

Email: [] Active:

Username: [] Marketing User:

Nickname: [] Offline User:

Title: [] Knowledge User:

Company: [] Flow User:

Department: [] Service Cloud User:

Division: [] Site.com Contributor User:

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

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION > Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings > Users Data Email PLATFROM TOOLS > Apps Feature Requests

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

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmiya Role: <None Specified>

Last Name: balaji User License: Salesforce Platform

Alias: sbala Profile: Manager

Email: 2k20ose179@kiot.ac.in Active:

Username: 2k21it@kiot.ac.in Marketing User:

Nickname: User169616771282564526 Offline User:

Title: worker Knowledge User:

Company: kiot bank Flow User:

Department:

Division:

Data.com User Type: [] Service Cloud User:

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

Accessibility Mode (Classic Only): Site.com Publisher User:

High-Contrast Palette on Charts: WDC User:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION > Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings > Users Data Email PLATFROM TOOLS > Apps Feature Requests

User Sowmya bala

User Detail

| Name | sowmya bala | Role | Salesforce Platform |
|---|--|--------------------------------------|---------------------|
| Alias | sbala | User License | Manager |
| Email | 2k20case179@kiot.ac.in [Verify] | Profile | Active ✓ |
| Username | 2k21it@kiot.ac.in | Marketing User | |
| Nickname | User16961677128256452616 | Offline User | |
| Title | worker | Knowledge User | |
| Company | kiot bank | Flow User | |
| Department | | Service Cloud User | |
| Division | | Sites.com Contributor User | |
| Address | | Sites.com Publisher User | |
| Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) | WDC User | |
| Locale | English (India) | Mobile Push Registrations | ✓ |
| Language | English | Data.com User Type | |
| Delegated Approver | | Accessibility Mode (Classic Only) | |
| Manager | Only if I am an approver | Debug Mode | |
| Federation ID | | High-Contrast Palette on Charts | |
| App Registration: One-Time Password Authenticator | | Load Lightning Pages While Scrolling | ✓ |
| App Registration: Salesforce Authenticator | | Salesforce CRM Content User | ✓ |

Compose

Inbox 5,318

support@salesforce.com <support@salesforce.com> to me

7:13 PM (0 minutes ago)

Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Username:
2k21it@kiot.ac.in

Again, welcome to Salesforce!

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(9) WhatsApp x | (1) Salesforce Dev x | (128) Top Hit x | Object Manager x | Users | Sales x | Downloads x | Welcome to x | Recently Viewed x | Change Your x + - _ Finish update

artificialintelligence-d-dev-ed.develop.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupId=Ch...

salesforce

Change Your Password

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

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

..... Good

* Confirm New Password

..... Match

Security Question

In what city were you born?

* Answer

salem

Change Password

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

Login | Salesforce x +

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

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

MECW

mecw Bank customers Home

Bank Recently Viewed

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

Bank Name ↓

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

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

Settings Log Out

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic

Add Username

New Bank | Salesforce +

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

mecw Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

* = Required Information

Information

*Bank Name: boi

Owner: sowmiya bala

phoneno: 0897754534

Cancel Save & New Save

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

Top Screenshot: A "New customer" form is open. The "Information" section contains two required fields: "customer Name" (set to "madhu") and "Bank" (set to "boi"). Below the form are three buttons: "Cancel", "Save & New", and "Save".

Bottom Screenshot: The customer record has been successfully created. A green banner at the top right of the page states "customer 'madhu' was created." The record details are shown in the "Details" tab, including the customer name "madhu", bank "boi", and the creation information: "Created By" (sowmiya bala) and "Last Modified By" (sowmiya bala). Navigation buttons "New Contact", "Edit", and "Delete" are visible on the right.

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

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"/> |

1.7 of 7 0 Selected | Page 1 of 1

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

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 | <input type="text" value="salesmanager"/> |

Save Cancel

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

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.

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

Profile Detail

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

Page Layouts

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

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

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 |
|------|-------------|--------------|---------------------|-------------|----------------|
| | | | | | ✓ |

Custom App Settings

| Visible | Default | Visible | Default |
|-------------------------------------|----------------------------------|--------------------------|----------------------------------|
| <input type="checkbox"/> | <input checked="" type="radio"/> | <input type="checkbox"/> | <input checked="" type="radio"/> |
| <input type="checkbox"/> | <input checked="" type="radio"/> | <input type="checkbox"/> | <input checked="" type="radio"/> |
| <input checked="" type="checkbox"/> | <input type="radio"/> | <input type="checkbox"/> | <input checked="" type="radio"/> |

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

| Home | Default On |
|----------|------------|
| Accounts | Learning |

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

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

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

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Save | Save & New | Cancel

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

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit

General Information

First Name:

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

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit

General Information

First Name: 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 yo... | + | Finish update

The screenshot shows the Salesforce Setup interface with the 'User Management Settings' section selected under 'User'. The 'Users' tab is active. The main content area displays the 'Users' configuration page with sections for 'Mailing Address', 'Single Sign On Information', 'Locale Settings', and 'Approver Settings'. The 'Mailing Address' section includes fields for Street, City, Zip/Postal Code, State/Province, and Country. The 'Single Sign On Information' section has a 'Federation ID' field. The 'Locale Settings' section shows the Time Zone as '(GMT+05:30) India Standard Time (Asia/Kolkata)', Locale as 'English (India)', and Language as 'English'. The 'Approver Settings' section includes fields for 'Delegated Approver' and 'Manager', and a dropdown for 'Receive Approval Request Emails' set to 'Only if I am an approver'. A checkbox for 'Generate new password and notify user immediately' is checked. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

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

This screenshot is identical to the one above, showing the 'User Management Settings' page for 'Users' in the Salesforce Setup interface. The configuration fields for Mailing Address, Single Sign On Information, Locale Settings, and Approver Settings are the same, with the 'Generate new password and notify user immediately' checkbox checked. The 'Save', 'Save & New', and 'Cancel' buttons are visible at the bottom.

Screenshot of the Salesforce Developer Session 2 interface showing the User Management Settings for a user named "madhu b".

User Detail:

- Name: madhu b
- Alias: mb
- Email: 2k20csit79@kiot.ac.in [Verify]
- Username: 2k20csit@kiot.ac.in
- Nickname: User16961684242855419206
- Title: worker
- Company: kiot bank
- Department: Sales
- Division: Address: 41/94, aryanpalayam, uhamasolapuram .., Paraikkadu , salem- 636308
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English
- Delegated Approver: Manager
- Receive Approval Request Emails: Only if I am an approver
- Federation ID: App Registration: One-Time Password Authenticator
- Role: User License: Active, Profile: salesmanager
- Site.com Contributor User
- Site.com Publisher User
- WDC User
- Mobile Push Registrations: View
- Data.com User Type:
- Accessibility Mode (Classic Only):
- Debug Mode:
- High-Contrast Palette on Charts:
- Load Lightning Pages While Scrolling:

Gmail inbox:

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 Incognito (3) Finish update

MECW

mecw Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New

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

List View

Recently Viewed | customers | [+ Incognito \(3\) Finish update](#)

MECW

Search... [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

(9) WhatsApp | Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesfor... | Welcome to Salesforce! | Reset Password | Salesfor... | [Finish update](#)

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

Setup Home Object Manager

Search Setup

Permission Sets

Help for this Page

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

| Action | Permission Set Label | Description | License |
|--------------------------|-------------------------------------|---|--|
| <input type="checkbox"/> | Access to activity | Allows access to the store. Lets users see products and categories, ... | B2B Buyer Permission Set One Seat |
| <input type="checkbox"/> | Buyer | Includes all Buyer capabilities, and allows access to manage carts an... | B2B Buyer Manager Permission Set One Seat |
| <input type="checkbox"/> | Buyer Manager | Denotes that the user is a Sales Cloud or Service Cloud user. | CRM User |
| <input type="checkbox"/> | CRM User | Allow access to commerce admin features. | Commerce Admin Permission Set License Seat |
| <input type="checkbox"/> | Commerce Admin | Manage Service Cloud Voice contact centers that Amazon Conn... | Service Cloud Voice User |
| <input type="checkbox"/> | Contact Center Admin | Access agent features in Service Cloud Voice contact centers that us... | Service Cloud Voice User |
| <input type="checkbox"/> | Contact Center Agent | Access supervisor features in Service Cloud Voice contact centers th... | Service Cloud Voice User |
| <input type="checkbox"/> | Contact Center Supervisor | Salesforce | |
| <input type="checkbox"/> | Experience Profile Manager | Allows users create, read, edit, and delete locations, sublocations, que... | Facility Manager |
| <input type="checkbox"/> | Facility Manager | Give your mobile workforce access to the Field Service mobile app. S... | Field Service Mobile |
| <input type="checkbox"/> | FieldServiceMobileStandardPermSet | Allow access to commerce merchandising features. | Commerce Merchandiser User Permission Set License Seat |
| <input type="checkbox"/> | Merchandiser | Read Access to all entities enabled by Order Management | Lightning Order Management User |
| <input type="checkbox"/> | Order Management 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 | All | [New](#) | [Edit](#)

Page 1 of 2

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:

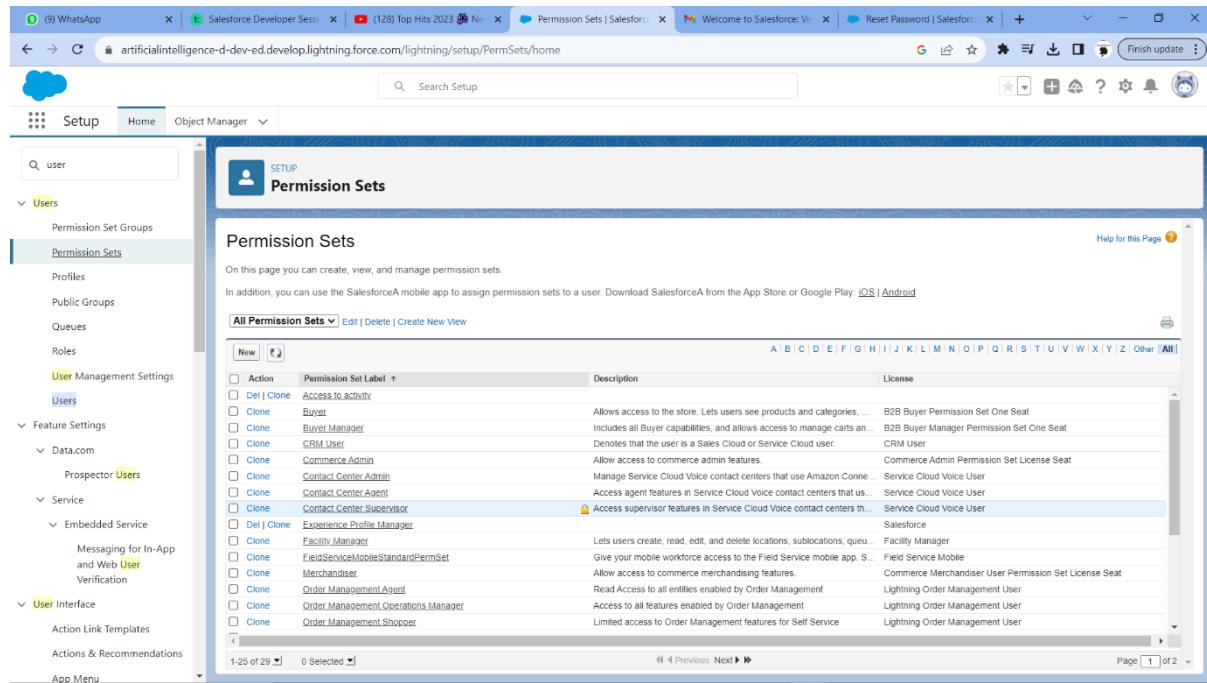
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

Organization-Wide Defaults:

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

Testing:

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



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main content area displays a table of permission sets. The table columns are 'Action', 'Permission Set Label +', 'Description', and 'License'. The table lists various permission sets such as Access_to_Activity, Buyer, Buyer_Manager, CRM_User, Commerce_Admin, Contact_Center_Admin, Contact_Center_Agent, Contact_Center_Supervisor, Experience_Profile_Manager, Facility_Manager, FieldServiceMobileStandardPermSet, Merchandiser, Order_Management_Agent, Order_Management_Operations_Manager, and Order_Management_Shopper. Each row includes a checkbox for 'Action' and a 'Clone' button. The 'Description' column provides a brief overview of the permissions granted, and the 'License' column indicates the specific license required for each set. The bottom of the page shows navigation links for 'Previous' and 'Next' pages, and a note indicating there are 1-25 of 29 permission sets listed.

| Action | Permission Set Label + | Description | License |
|--------------------------|------------------------|---|---|
| <input type="checkbox"/> | Access_to_Activity | Allows access to the store. Lets users see products and categories, ... | B2B Buyer Permission Set One Seat |
| <input type="checkbox"/> | Clone | Buyer | B2B Buyer Manager Permission Set One Seat |
| <input type="checkbox"/> | Clone | Buyer_Manager | CRM User |
| <input type="checkbox"/> | Clone | CRM_User | Commerce Admin Permission Set License Seat |
| <input type="checkbox"/> | Clone | Commerce_Admin | Commerce Admin |
| <input type="checkbox"/> | Clone | Contact_Center_Admin | Commerce Cloud Voice contact centers that use Amazon Conne... |
| <input type="checkbox"/> | Clone | Contact_Center_Agent | Manage Service Cloud Voice contact centers that use Amazon Conne... |
| <input type="checkbox"/> | Clone | Contact_Center_Supervisor | Access agent features in Service Cloud Voice contact centers that us... |
| <input type="checkbox"/> | Clone | Experience_Profile_Manager | Access supervisor features in Service Cloud Voice contact centers th... |
| <input type="checkbox"/> | Clone | Facility_Manager | Salesforce |
| <input type="checkbox"/> | Clone | FieldServiceMobileStandardPermSet | Facility Manager |
| <input type="checkbox"/> | Clone | Merchandiser | Field Service Mobile |
| <input type="checkbox"/> | Clone | Order_Management_Agent | Commerce Merchandiser User Permission Set License Seat |
| <input type="checkbox"/> | Clone | Order_Management_Operations_Manager | Allow access to commerce merchandising features. |
| <input type="checkbox"/> | Clone | Order_Management_Shopper | Read Access to all entities enabled by Order Management |
| | | | Access to all features enabled by Order Management |
| | | | Limited access to Order Management features for Self Service |

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. On the left, the navigation sidebar is open, showing categories like 'Users', 'Feature Settings', 'Data.com', 'Service', 'User Interface', and 'App Menu'. The 'Users' category is expanded, showing sub-options such as 'User Management Settings' and 'Prospector Users'. The main content area displays the 'Permission Set Create' page. The 'Enter permission set information' section requires the 'Label' (set to 'user') and 'API Name' (set to 'user'). The 'Description' field is empty. The 'Session Activation Required' checkbox is unchecked. Below this, the 'Select the type of users who will use this permission set' section includes a note about who will use the permission set ('None') and options for assigning it to multiple users or specific user or permission set licenses. The 'License' dropdown is set to '-None-'.

This screenshot is identical to the one above, except the 'Label' field now contains 'salesmanager' and the 'API Name' field also contains 'salesmanager'. All other fields and settings remain the same as in the first screenshot.

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

Permission Set Overview:

| Setting | Description |
|------------------|-----------------------------|
| API Name | salesmanager |
| Namespace Prefix | GOPALS_ |
| Created By | GOPALS_ 01/10/2023, 7:29 pm |

Apps:

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

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

Object Settings:

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

Salesforce Developer Session | WhatsApp | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

Permission Set Overview > Object Settings > Bank

Object Permissions

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

Field Permissions

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

Salesforce Developer Session | WhatsApp | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

Object Permissions

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

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OP55j000008Phok/PermissionSetAssignment/home

Setup Home Object Manager

Search Setup

User salesmanager

Current Assignments

No assignments defined.

This screenshot shows the Salesforce Setup interface for managing users. The left sidebar is expanded to show the 'Users' section under 'Permission Set Groups'. The main area displays the 'salesmanager' user profile. Below the profile picture, the heading 'Current Assignments' is followed by a decorative illustration of a cactus and clouds. A message indicates 'No assignments defined.' There are buttons for 'Edit', 'Delete', and 'Add Assignment'.

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OP55j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Search Setup

Select Users to Assign

All Users

1 item selected

| Full Name ↑ | All... ↓ | Username | Role | Ac... ↓ | Profile |
|------------------|----------|---|-------------------------------------|-----------------------------------|----------------------------------|
| Amelia Ellington | aelli | amelia.ellington.146kxcp9oodih.d6cwpdcuo4wh.hnbdwvwvhq.wguctpr1dalv@gmail.com | <input checked="" type="checkbox"/> | Force.com - App Subscription User | <input type="button" value="▼"/> |
| Chatter Expert | Chatty | chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com | <input checked="" type="checkbox"/> | Chatter Free User | <input type="button" value="▼"/> |
| Diya Adanna | dadan | test_diya_pas.4w8bjybi9wik.tszgrgsbkbpx.3gi8ofovzwns.h43bkzw6mea@gmail.com | <input checked="" type="checkbox"/> | UMS User | <input type="button" value="▼"/> |
| GOPAL S | GS | kiot520@gmail.com | <input checked="" type="checkbox"/> | System Administrator | <input type="button" value="▼"/> |
| Integration User | integ | integration@00d5j00000bcskkeab.com | <input checked="" type="checkbox"/> | Analytics Cloud Integration User | <input type="button" value="▼"/> |
| madhu b | mb | 2k20csit@klot.ac.in | <input checked="" type="checkbox"/> | salesmanage | <input type="button" value="▼"/> |
| Security User | sec | insightssecurity@00d5j00000bcskkeab.com | <input checked="" type="checkbox"/> | Analytics Cloud Security User | <input type="button" value="▼"/> |
| sowmya bala | sbala | 2k21it@kiot.ac.in | <input checked="" type="checkbox"/> | Manager | <input type="button" value="▼"/> |

Cancel Next

This screenshot shows the 'Select Users to Assign' dialog box. The title is 'All Users'. It lists eight users with their full names, usernames, and profiles. The user 'madhu b' has a checked checkbox next to it, indicating they are selected. At the bottom of the dialog are 'Cancel' and 'Next' buttons.

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

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/OP55j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

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

Cancel Back Assign

This screenshot shows the 'Select an Expiration Option For Assigned Users' page in the Salesforce Setup. It displays a table of selected users, with one user ('madhu b') assigned to the 'salesmanager' profile. The user has a 'Salesforce Platform' license and 'Never Expires'. The 'Expires On' column is set to 'Never Expires'.

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

artificialintelligence-d-dev-ed.lightning.force.com/one/one.app#eyjjb21wb25lbREZWYiOjUzZXR1cF9wbGF0Zm9ybV9wZXItczpwc2FSZXN1bHRQYWdliw...

Setup Home Object Manager

PERMISSION SET 'SALESMANA' 1 assignments were successful.

salesmanager

Assignment Summary

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

Done

This screenshot shows the 'Assignment Summary' page after the permission set assignment was completed. A success message indicates '1 assignments were successful.' The summary table shows the user 'madhu b' assigned to the 'Salesforce Platform' license with a status of 'Success'.

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

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

MECW

mebw 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. | |

LIST VIEW CONTROLS

New

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

`javascript:void(0)`

This screenshot shows a Salesforce Lightning interface for a 'customers' list view. The title bar indicates 'Recently Viewed | customers'. The main content area displays a table with a single row: 'You haven't viewed any customers recently. Try switching list views.' A context menu is open on the right side of the screen, specifically over the 'LIST VIEW CONTROLS' header. The 'New' option is highlighted. Other menu items include Clone, Rename, Sharing Settings, Show List Filters, Select Fields to Display, Delete, and Reset Column Widths. The URL in the browser is 'artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer_c/list?filterName=Recent'.

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.

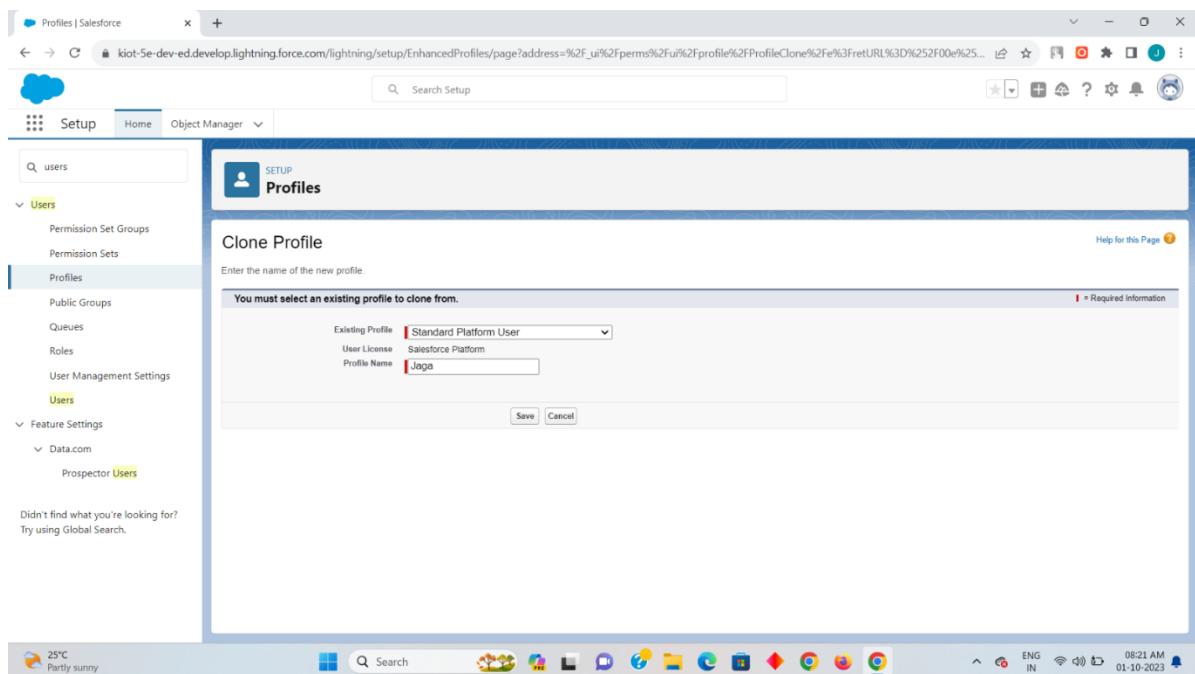
Setup-quick search[profile]

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

- Page Title:** Profiles | Salesforce
- URL:** kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e%3FisDeleteRedirect%3Dtrue%26setupid%3DEnhancedProfiles
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, Users (selected), Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, Prospector.
- Content Area:**
 - Section Header:** Profiles
 - Sub-Header:** All Profiles ▾, Edit | Delete | Create New View
 - Table:** A list of profiles with columns: Action, Profile Name, User License, and Custom. Some profiles have checkboxes next to them. Examples include:
 - Analytics Cloud Integration User (User License: Analytics Cloud Integration User)
 - Analytics Cloud Security User (User License: Analytics Cloud Integration User)
 - Authenticated Website (User License: Authenticated Website)
 - Chatter External User (User License: Chatter External)
 - Chatter Free User (User License: Chatter Free)
 - Chatter Moderator User (User License: Chatter Free)
 - Contract Manager (User License: Salesforce)
 - Cross Org Data Proxy User (User License: XOrg Proxy User)
 - Custom Marketing Profile (User License: Salesforce)
 - Custom Sales Profile (User License: Salesforce)
 - Custom Support Profile (User License: Salesforce)
 - Customer Community Login User (User License: Customer Community Login)
 - Customer Community Plus Login User (User License: Customer Community Plus Login)
 - Customer Community Plus User (User License: Customer Community Plus)
 - Page Footer:** Page 1 of 2, 1-25 of 41, 0 Selected.
- Bottom Bar:** Weather (25°C, Partly sunny), Search, and various system icons.
- System Status:** ENG IN, 08:20 AM, 01-10-2023.

Step 2:

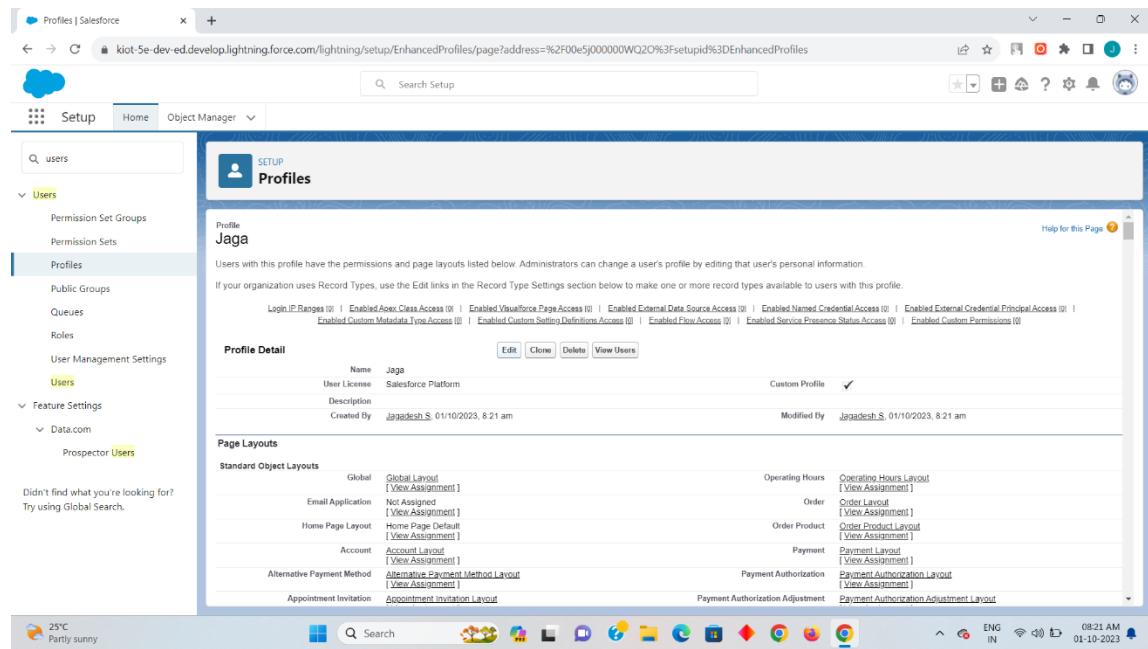
Click on the new to create a new profile along with the label and Api



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.

25°C Partly sunny

SETUP Profiles

Communication Subscription Consents Communication Subscription Timings Contacts Contact Point Addresses Contact Point Consents Contact Point Emails Locations Party Consents Push Topics Sellers Streaming Channels User External Credentials

Custom Object Permissions

| | Basic Access | Create | Edit | Delete | Data Administration |
|-----------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| Providers | <input type="checkbox"/> View All <input type="checkbox"/> Modify All |
| Resources | <input type="checkbox"/> Read <input type="checkbox"/> Create <input type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/> View All <input type="checkbox"/> Modify All |

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

ENG IN 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.

25°C Partly sunny

SETUP Profiles

Communication Subscription Consents Communication Subscription Timings Contacts Contact Point Addresses Contact Point Consents Contact Point Emails Locations Party Consents Push Topics Sellers Streaming Channels User External Credentials

Custom Object Permissions

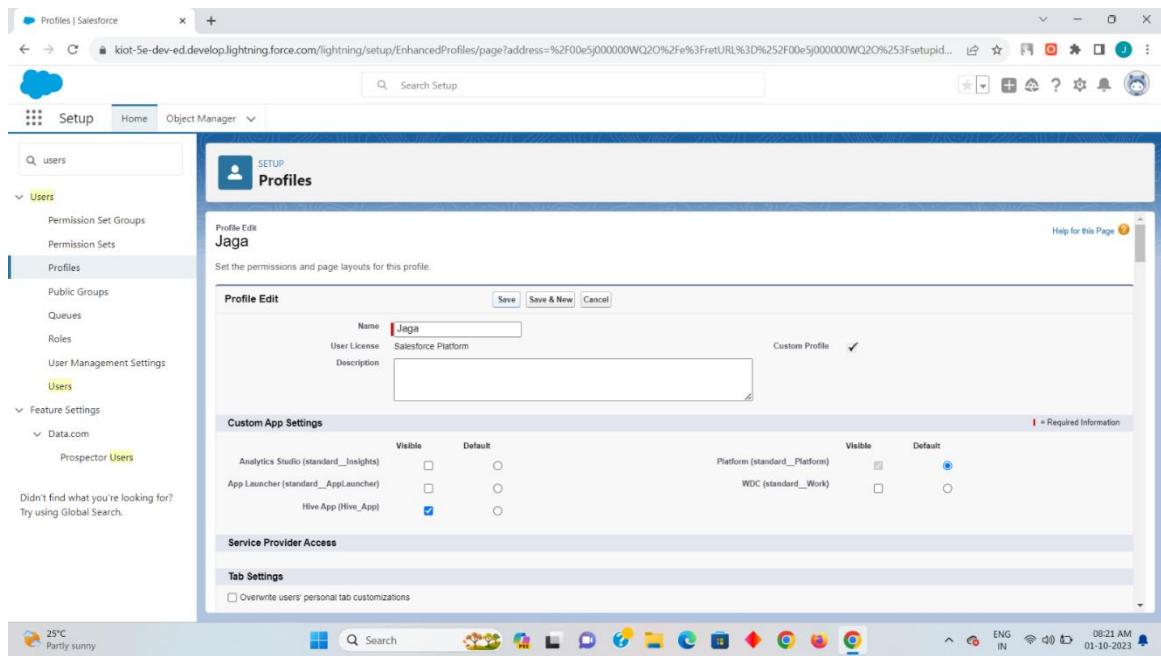
| | Basic Access | Create | Edit | Delete | Data Administration |
|-----------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---|
| Providers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> View All <input type="checkbox"/> Modify All |
| Resources | <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> View All <input checked="" type="checkbox"/> Modify All |

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

ENG IN 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.00d500000c8joseaf6z@bkrikid4@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> | Grey_Jane | Jgrey | jane_gran_fygnimmajm.c27d2kioqth@gmail.com | | <input checked="" type="checkbox"/> | Customer Community User |
| <input type="checkbox"/> | S.Jaga | JS | jaga38@gmail.com | CEO | <input type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> | S.Jagadesh | JS | w0w@gmail.com | SF Admin | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | S.Jagadesh | JS | jaga1117@gmail.com | Channel Sales Team | <input type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> | User_Integration | Integ | integration@00d500000c8joseaf.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> | User_Security | sec | insightssecurity@00d500000c8joseaf.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |

Salesforce Setup - Users

New User

User Edit

General Information

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

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

Office User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type: None, Data.com Monthly Addition Limit: Default Limit (300), Accessibility Mode (Classic Only): None, High-Contrast Palette on Charts: None

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

Salesforce Setup - Users

New User

User Edit

General Information

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

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

Office User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type: None, Data.com Monthly Addition Limit: Default Limit (300), Accessibility Mode (Classic Only): None, High-Contrast Palette on Charts: None

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

Salesforce Setup - Users

All Users

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

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

View: All Users | Create New View

| Action | Full Name | Alias | Username | Role | Active | Profile |
|-------------------------------------|-------------------|-------|------------------|-------------------------|-------------------------------------|------------------------|
| <input type="checkbox"/> | Edit S.Jagadesh | jS | jwv10@gmail.com | CEO | <input checked="" type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> | Edit S.Jagadesh20 | jS | x0@y0t0.com | SP Admin | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | Edit S.Jagadesh | jS | jwv117@gmail.com | Channel Sales Team | <input type="checkbox"/> | Standard Platform User |
| <input checked="" type="checkbox"/> | Edit S.Jagadesh11 | jS | jwv123@gmail.com | Director, Channel Sales | <input checked="" type="checkbox"/> | Jaga |
| <input checked="" type="checkbox"/> | Edit S.Jagadesh22 | jS | jwv10@gmail.com | Marketing Team | <input checked="" type="checkbox"/> | Standard Platform User |

New User | Reset Password(s) | Add Multiple Users | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

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

Now you can preview your two user that you have created in my side I had create the two users a 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

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Permission Sets

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 [Clone](#)

| Action | Permission Set Label | Description | License |
|--------------------------|---------------------------|-----------------------------------|--|
| <input type="checkbox"/> | Clone | Buyer | B2B Buyer Permission Set One Seat |
| <input type="checkbox"/> | Clone | Buyer Manager | B2B Buyer Manager Permission Set One Seat |
| <input type="checkbox"/> | Clone | CRM User | CRM User |
| <input type="checkbox"/> | Clone | Commerce Admin | Commerce Admin Permission Set License Seat |
| <input type="checkbox"/> | Clone | Contact Center Admin | Manage Service Cloud Voice contact centers that use Amazon Commerce |
| <input type="checkbox"/> | Clone | Contact_Center_Agent | Access agent features in Service Cloud Voice contact centers that use Amazon Commerce |
| <input type="checkbox"/> | Clone | Contact_Center_Supervisor | Access supervisor features in Service Cloud Voice contact centers that use Amazon Commerce |
| <input type="checkbox"/> | Del/Clone | Experience Profile Manager | Salesforce |
| <input type="checkbox"/> | Clone | Facility Manager | Facility Manager |
| <input type="checkbox"/> | Clone | FieldServiceMobileStandardPermSet | Field Service Mobile |
| <input type="checkbox"/> | Clone | Merchandise | Commerce Merchandise User Permission Set License Seat |
| <input type="checkbox"/> | Clone | OrderManagementAgent | Lightning Order Management User |
| <input type="checkbox"/> | Clone | OrderManagementOperationsManager | 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 | [All](#)

1-25 of 30 | [Selected](#)

Page | 1 of 2

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

25°C Partly sunny

Q Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Permission Set Create

Enter permission set information

Label: API Name: 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://kot-5e-dev-ed.lightning.force.com/one/one.app#/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

25°C Partly sunny

Q Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5\$000008Pgt%3FsfdclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

Search

Cloud File Explorer Home Help

Video Tutorial | Help for this Page

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

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

Permission Set Overview

Description
License
Session Activation Required
Last Modified By

Apps

Assigned Apps
Assigned Connected Apps
Object Settings
App Permissions
Apex Class Access
Visualforce Page Access
External Data Source Access

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5\$000008Pgt%3DsEntityPermissions

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

Search

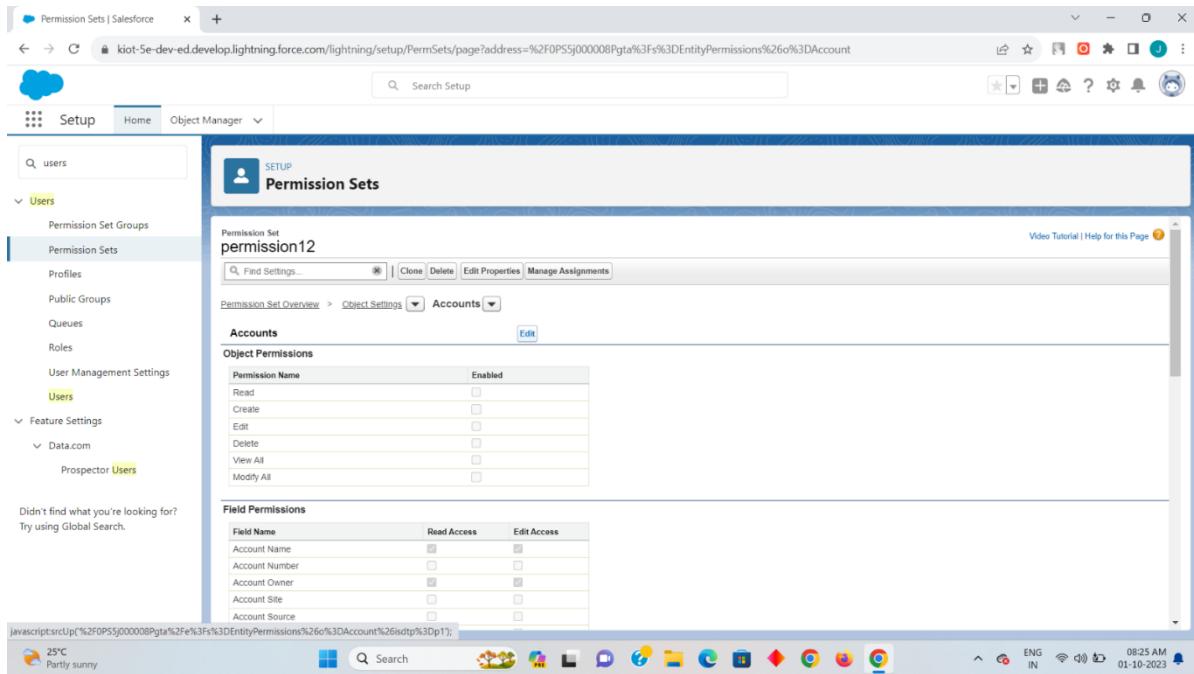
Cloud File Explorer Home Help

Video Tutorial | Help for this Page

Object Settings

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

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:

- Object Permissions:**

| Permission Name | Enabled |
|-----------------|-------------------------------------|
| Read | <input type="checkbox"/> |
| Create | <input checked="" type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> |
| Delete | <input checked="" type="checkbox"/> |
| View All | <input type="checkbox"/> |
| Modify All | <input type="checkbox"/> |
- Field Permissions:**

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

Step 8

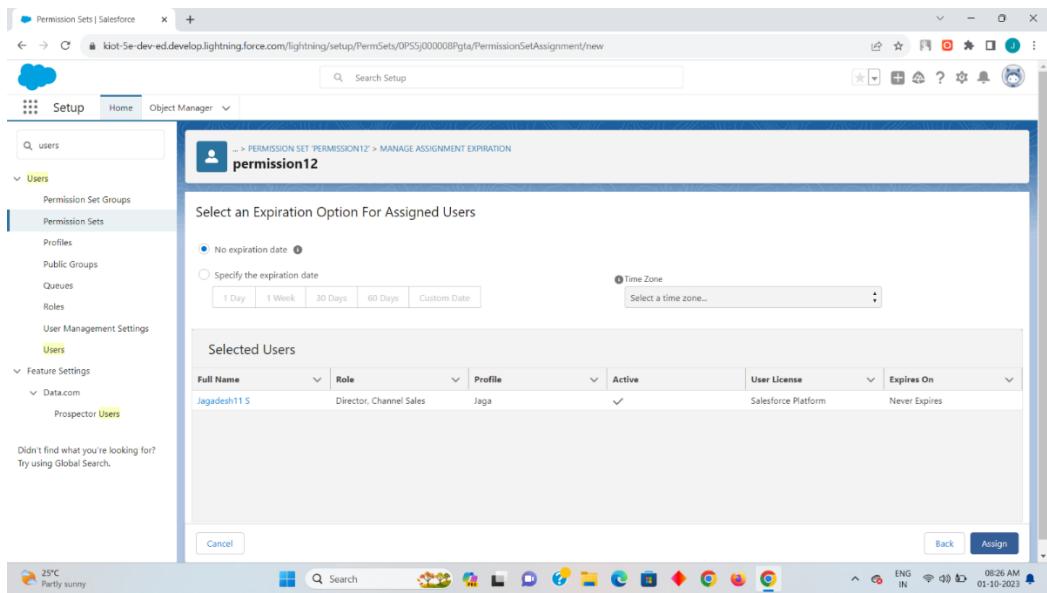
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.

The screenshot shows the 'Permission Sets | Salesforce' page. The left sidebar is expanded, showing 'Users' selected under 'Permission Sets'. The main content area is titled 'permission12' and shows a section titled 'Current Assignments' with a cactus and sun icon. Below it, a message says 'No assignments defined.' A small note at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

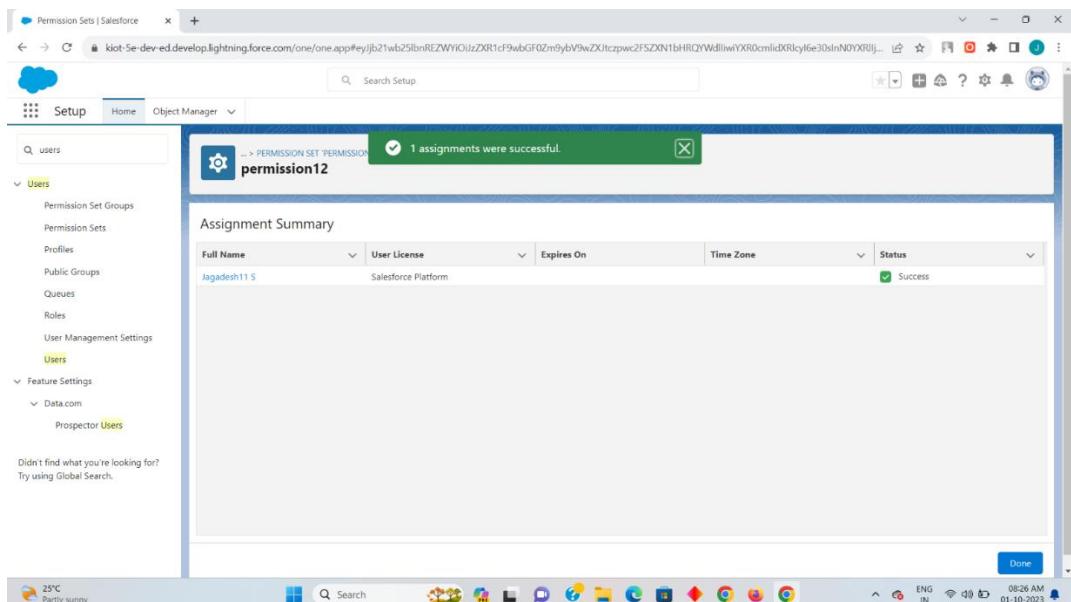
This screenshot shows the 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog. It has a title bar 'permission12'. The main area is titled 'Select Users to Assign' and contains a table with columns: Full Name, Alias, Username, Role, Active, and Profile. A search bar at the top right shows 'jagadesh'. A note below the search bar says 'Roles, Alias, and Profile aren't searchable. Use filters or sort on these fields instead.' The table lists four users: Jagadesh S, Jagadesh S, Jagadesh11 S, and Jagadesh22 S. The 'Active' column for Jagadesh11 S is checked. The 'Profile' column for all users is set to 'System Administrator'. A 'Next' button is visible at the bottom right.

This screenshot shows the same 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog. The 'Active' column for Jagadesh11 S is now unchecked. The 'Profile' column for Jagadesh11 S is now set to 'Jaga'. The 'Next' button is visible at the bottom right.

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 |
|---|---|

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

Additional Emails:

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

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.

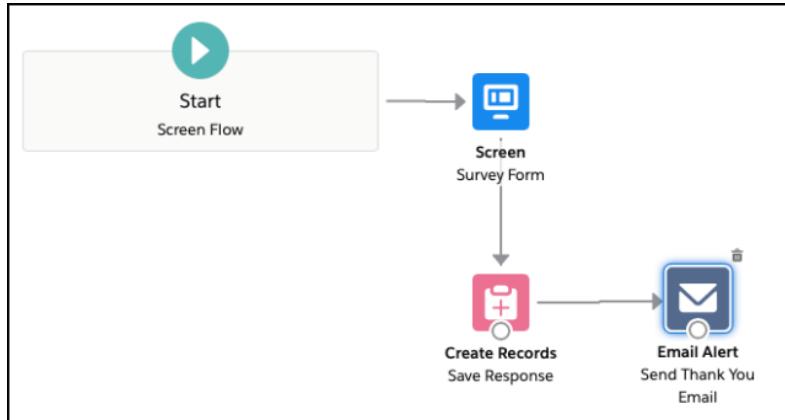
Edit "Survey - Thank You Email" email alert

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 | |
| A_a * Record ID | {!Save_Response} |

Cancel 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

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

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

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

The screenshot shows the Salesforce IDE interface. At the top, there is 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 is 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 buttons for 'Save', 'Quick Save', 'Cancel', 'Where is this used?', 'Component Reference', and 'Preview'. A note 'I = Required Information' is present. The main area has tabs for 'Page Information' and 'Visualforce Markup'. Under 'Page Information', fields include 'Label' (Survey), 'Name' (Survey), and 'Description'. There are checkboxes for 'Available for Lightning Experience, Experience Builder sites, and the mobile app' (checked) and 'Require CSRF protection on GET requests' (unchecked). The 'Visualforce Markup' tab is active, showing 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") {
                // Do something with myOutput
            }
        }
    }
};
$Lightning.use("c:VFFPageToLC", function() {
    $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
        "flowContainer",
        function (component) {
            component.startFlow("Survey", );
        }
    );
});
</script>
</body>
```

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

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

1. Click **Setup**.

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

Site Edit

Save **Cancel**

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

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